



森美(集團)控股有限公司
Summi (Group) Holdings Limited
00756.HK

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聯絡方式

馬有恆 Brian Ma
森美(集團)控股有限公司
電郵: brianma@hksummi.com

劉秀芳 Sabrina Lau
森美(集團)控股有限公司
電郵: sabrinalau@hksummi.com

電話:(852) 3163 1000
傳真:(852) 3163 1122



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JUICE IN CHINA

Euromonitor International
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森美集團首次獲歐睿國際(Euromonitor International) 2018年2月中國果汁飲料行業 Passport-Juice in China報告關注

JUICE IN CHINA

HEADLINES

- Juice records an off-trade current value decline of 1% and off-trade volume decline of 4% in 2017.
- Upgraded consumption adds some positivity to sales.
- Off-trade volume decline is outpaced by net on-trade volume performance in 2017.
- Coca-Cola China Ltd leads the category with off-trade value sales of CNY14.7 billion in 2017.
- Juice to see an off-trade CAGR of -1% at constant 2017 prices and an off-trade volume CAGR of -2% over the forecast period to fall to CNY75.3 billion and 8.7 billion litres in 2022.

PROSPECTS

Upgraded Consumption Fuels Some Dynamism

With growing disposable incomes and the rise of the middle class, high-end juice, such as not from concentrate 100% juice, has enjoyed robust growth. Although the overall juice category suffered negative off-trade volume and value growth in 2017, not from concentrate 100% juice grew by 20% and 24%, respectively, in the same year, boosted by its better taste and healthier product positioning due to shorter shelf life. Moreover, no additives or sugar are added to such products, further promoting its healthy image.

Consumers' leaning up to 100% juice, particularly not from concentrate 100% juice, are expected to continue to do so over the forecast period, supported by rising health awareness and disposable income. As such, more manufacturers are anticipated to launch relevant products over the forecast period to ride the healthier juice wave. To resolve the issue of cold storage, Beijing Huiyuan introduced Xiangguo Yuanzhi not from concentrate 100% orange juice in early 2017, which can be stored at room temperature. More manufacturers are expected to follow Beijing Huiyuan and launch similar new products over the forecast period.

Orange Juice is Still the Mainstay

Orange juice is still the primary product. As such, reconstituted orange juice represents the bulk of category presence. Nevertheless, niche flavours and compound juice have also proved persuasive, such as cranberry juice, blueberry juice, aloe vera and kiwi juice. Consumers are, in fact, in pursuit of juice with more health benefits, such as strong antioxidant.

Over the forecast period, orange juice is likely to continue its lead in juice, thanks to its competitiveness in production cost and cycle. However, niche juice is also expected to flourish, to meet consumers' varied consumption needs.

Creative Approaches To Woo Young Consumers

To attract young consumers, juice manufacturers adopt new brand strategies and employ creative marketing approaches to connect with young Chinese. Beijing Huiyuan relied on the popular short video clips and live broadcasting to promote its brand and products. In the first half of 2017, the company invited actor, Lin Gengxin, to send season's greeting in short video clips during the Chinese New Year and produced an internet hit, Qiansheyi short video clip, introducing Huiyuan's products and manufacturing process. The company also joined with other

Manufacturers of Not From Concentrate 100% Juice Enjoy Dynamism

With a smaller base, manufacturers of not from concentrate 100% juice enjoyed faster growth in 2017, evidenced by China Tianyi Holdings Ltd and Shanghai Jiajun Beverage Co Ltd, as they have just emerged, with rapid expansion through the establishment of nationwide sales networks. Expanding from a regional brand, Summi from China Tianyi Holdings is currently more present in high-end supermarkets. 2017 saw Summi's penetration into automatic vending machines in subway stations in Shanghai. Vita Coco from All Market Inc, nevertheless, focused on second- and third-tier cities, particularly in Northwest and Southwest China, where there is great potential.

非濃縮還原100%果汁生產商享受其增長動力

由於基數較小，中國天溢控股有限公司和上海佳駿飲料有限公司即隨之掘起，通過建立全國銷售網絡迅速擴張，證明了2017年非濃縮果汁生產商正處於快速增長。來自中國天溢控股的森美(Summi)從一個區域品牌擴展至目前更多高端超市。在2017年裡，可見森美(Summi)透過自動售貨機亦滲透上海地鐵車站。

當中報告揭曉整體飲料市場及品牌排名

森美集團於2015年開始生產及銷售自「森美鮮榨橙汁」近年採取漸進式的行銷策略拓展市佔率，現銷售點約5,000個，分佈於北京、上海、重慶、成都、廣州、深圳和香港等富裕城市。

當中報告亦指出未來行業及市場飲料口味等消費趨勢，尤以消費升級促進行業活力 - 「隨著可支配收入的增加及中產階級掘起，高端果汁尤其是非濃縮還原100%果汁已處強勁增長。」及橙汁依然是主流 - 「橙汁仍然是主要產品，而還原橙汁(reconstituted orange juice)反映整體存在格局。」

Euromonitor 對中國2022年100%純果汁市場預測為138 百億元人民幣

Table 11 LBN Brand Shares of Off-trade Juice: % Value 2014-2017

% off-trade value nsp Brand (GB0)	Company (NBO)	2014	2015	2016	2017
Minute Maid (Coca-Cola Co. The)	Coca-Cola China Ltd	17.4	16.9	18.1	18.5
Hui Yuan (China Huiyuan Juice Group Ltd)	Beijing Huiyuan Beverage & Food Group Corp	5.3	6.5	7.4	8.1
Master Kong	Ting Hsin International Corp	8.1	6.5	5.9	6.9
Garden Fresh (China National Food Industry Group Corp)	Shenzhen Grandness Industry Groups Co Ltd	4.9	5.9	6.5	5.6
Wahaha	Hangzhou Wahaha Group Co Ltd	4.1	3.3	3.0	2.7
President (Uni- President Enterprises Corp)	President Enterprises (China) Investment Co Ltd	5.7	3.9	2.3	2.0
Nongfu Orchard (Yiangshengfang Co Ltd)	Nongfu Spring Co Ltd	2.0	1.9	2.0	2.0
Qian Shou (Beijing Shunshu Agriculture Co Ltd)	Beijing Qianshou Fruit & Vegetable Beverage Co Ltd	1.7	1.6	1.7	1.8
Tropicana (PepsiCo Inc)	Ting Hsin International Group	1.5	1.5	1.6	1.7
Sea Salt (Uni- President Enterprises Corp)	President Enterprises (China) Investment Co Ltd	0.6	2.9	1.9	1.7
Wei Chuan (Ting Hsin International Group)	Hangzhou Wei Chuan Foods Co	0.5	0.6	0.8	0.8
Lingxunofang	Shanghai Jiajun Beverage Co Ltd	0.3	0.5	0.6	0.8
Sunjoy Qin Hing Water (Sutony Holdings Ltd)	Beijing Huiyuan Beverage & Food Group Corp	0.4	0.6	0.6	0.6
Rougemont (Lassonde Industries Inc)	Great Lake Tianjin Fresh Foods & Juice Co Ltd	0.5	0.5	0.5	0.6
Great Lake (Lwayway Marketing Corp)	Great Lake Tianjin Fresh Foods & Juice Co Ltd	0.6	0.6	0.5	0.4
Dole (Dole Food Co Inc)	PepsiCo China Ltd	0.4	0.4	0.4	0.4
FRUITCO	Wuxi Chengshan Foods Co Ltd	0.2	0.3	0.3	0.4
Doo (Coca-Cola Co. The)	Coca-Cola China Ltd	0.4	0.4	0.4	0.4
Summi	China Tianyi Holdings Ltd	-	0.1	0.2	0.4
Vita Coco	All Market Inc	-	0.1	0.3	0.4
Pai Sen Bai	Changping Pai Sen Bai Orange Juice Co Ltd	0.3	0.3	0.3	0.3
UFC (Lam Soon Group) Caps-Some (Deutsche SIS; Walle GmbH & Co KG)	Universal Food PCL Restates Beverage (Beijing) Co Ltd	0.1	0.2	0.3	0.3
Huabang (Lotte Group)	Lotte Huabang (Beijing)	0.2	0.2	0.3	0.3

Table 13 Forecast Off-trade Sales of Juice by Category: Value 2017-2022

CNY million	2017	2018	2019	2020	2021	2022
100% Juice	8,898.1	9,846.5	10,827.8	11,838.4	12,863.1	13,881.7

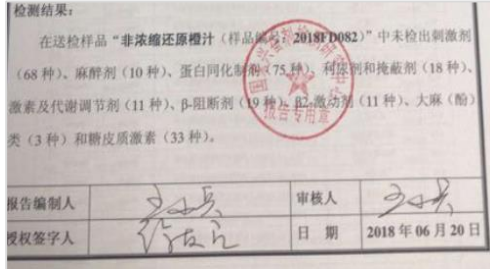


歐睿信息諮詢有限公司 (Euromonitor International) 成立於1972年，在出版市場報告，商業參考資料和網上資料庫方面擁有超過40年的經驗，服務和技術方面的不斷進步確保了公司多年來始終在所有市場信息解決方案提供者中的領先地位。歐睿信息諮詢公司對全球205個國家的消費者和行業信息進行研究，並對其中80個國家的市場相關信息進行深入調查。這80個國家和地區占了全球人口的85%，全球GDP的98%。

每年歐睿信息公司要出版超過6,000份市場調查報告，其中包括行業報告，國家報告，全球報告和公司介紹。歐睿在全球有超過1000位分析師，併在英國倫敦，美國芝加哥，新加坡，中國上海、日本東京、立陶宛維爾紐斯都等全球11個國家設有分部。總部位於英國倫敦。

「森美鮮榨橙汁」通過禁藥測試 為國家體育總局訓練局合作作好基礎

國家興奮劑檢測研究中心於6月30日發出有關森美非濃縮還原(NFC) 鮮榨橙汁的檢測報告。在被檢驗的非濃縮還原橙汁(NFC)樣本中並無發現刺激劑, 麻醉劑, 蛋白同化制劑, 利尿劑, 掩蔽劑, 激素及代謝調節劑, b-阻斷劑, b2-激動劑, 大麻及糖皮質激素。森美集團通過檢驗說明森美鮮榨橙汁的質量已達國家最高標準, 同時國家體育總局訓練局副局長呂鐵杭親臨森美集團重慶開州鮮橙果園視察, 森美集團為國家體育總局訓練局合作作好基礎。



「森美鮮榨橙汁」與「盒馬鮮生」達成銷售合作 進一步提升品牌競爭力

「森美鮮榨橙汁」與「盒馬鮮生」達成銷售合作。目前森美鮮榨橙汁已在盒馬鮮生全線北京、南京、廣州及深圳分店銷售, 預計在本年第三季亦會陸續拓展至貴陽、成都、西安分店銷售。客戶可到門市感受森美高端產品, 同時體現盒馬新零售的高效便捷。這不但有助提升品牌競爭力, 更能顯示森美鮮榨橙汁品質在消費升級的市場品位。



「森美鮮榨橙汁」借助智能無人售貨機戰略佈局 進入醫院重點消費群

目前森美鮮榨橙汁已通過智慧無人售貨機在中國北京、上海、廣州、深圳、南京、武漢、長沙、西安、福州、廈門、泉州、濟南、威海、煙台等地的醫院營運, 當中包括北京中國人民解放軍總醫院(301醫院)、上海復旦大學附屬中山醫院、中山大學附屬第一醫院黃埔院區、武漢大學中南醫院、北京大學深圳醫院、泉州兒童醫院、濟南婦幼保健院、廈門兒童醫院等醫院放置超過200台智能無人售貨機。



「森美鮮榨橙汁」進駐香港 HMV 各門店餐廳 成為健康活力生活時尚

森美鮮榨橙汁成功進駐香港 HMV 各門店, 以小專櫃陳列盒裝橙汁, 突顯森美鮮橙汁是健康活力的生活時尚, 森美小冰箱亦成為HMV內餐廳潮物。標榜「音樂·時尚·餐飲」集結一身的HMV 香港共有8間門店銷售影音產品及生活流行潮物。HMV是一間連鎖唱片店, 源自英國, HMV分店遍佈多個國家, 包括英國、加拿大、日本、香港、新加坡等地。



森美一直關懷社區，於四月份森美支持【陪著你跑】慈善路跑活動

森美關懷及深入社區，支持及贊助貝智基金「陪著你跑」慈善活動。是次活動路程長約6,800米。6,800是香港確診自閉症學童的數字。跑過6,800米，象徵跑者對自閉症兒童一步一步的支持。



森美活動



森美陪伴一起發動世界盃狂熱



森美與譚仔雲南米線推廣合作



積極推廣 關懷社區 建立品牌價值

森美支持7月13-15日既「探索大自然遊學園 x 動物農莊」親子活動



4月28至5月1日黃金海岸商場舉行「小小運動會」

