1998-1999

IMI

消费行为与生活形态年鉴

IMI CONSUMER BEHAVIOURS & LIFE PATTERNS YEARBOOK

北京·上海·广州·重庆·武汉·西安

BEIJING SHANGHAI GUANGZHOU CHONGQING WUHAN XIAN

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中国物价出版社

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第七篇　烟酒
Part VII　Alcohol Products and Cigarette

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- 白酒　Hard liquor
- 葡萄酒　Wine
- 香烟　Cigarette

烟酒

酒类

1997年，我国酒类产量有增无减，其中白酒总产量为800多万吨；啤酒为1866万吨，已连续四年蝉联世界亚军，且保持了高于10%的年增长率；葡萄酒继96年的红火之势后仍然有进一步的发展，年总产量达45万吨。

从整体上看今年的酒类市场，市场销售活跃，竞争异常激烈，各品种结构调整速度进一步加快，具体表现在：白酒的年销量继续走低，占饮料酒的比重将持续下降；啤酒的产量将继续增长，但增长速度减缓，优质高档啤酒的比重将提高；葡萄酒总体趋势依然看好，尤以干白、干红、干桃红为代表；黄酒在酒类行业中所占比例较小，因受地域等因素影响，只有部分名牌在市场上赢得了消费者和市场，今年将是黄酒扶强劣汰的重要一年；白兰地，威士忌困境未脱，销量会继续下降；保健酒销售情况转好，卫生部将对保健酒功能进行重新确定，从而净化保健酒市场。

根据人们的消费习惯，酒类销势也呈现四化，即低度化、优质化、大众化、营养化。

饮料酒工业是我国食品工业中的主要产业之一，国家针对其长期存在的结构问题提出“优质低耗，多品种”的发展方针，以及四个转变：粮食酒向果类酒转变，高度酒向低度酒转变，蒸馏酒向发酵酒转变，普通酒向优质酒转变。

啤酒

啤酒作为一种低酒精、高营养的饮料酒越来越受到消费者的青睐。它也是世界上最古老且最受人们欢迎的大众化酒种，种类很多，作用也不尽相同：象经过地巴氏高温杀菌处理的熟啤酒；未经地巴氏高温杀菌的生啤酒，俗称扎啤；以及干啤酒、黑啤酒和时下流行的保健啤酒、减肥啤酒等。

我国现有啤酒企业700多家，但绝大多数是一些小型企业，年产量超过十万吨的大型酒厂只有24家，超过5万吨的也只有61家，其余都是一些年产4万吨以下的小型酒厂。进入九十年代以来，我国啤酒工业经历了超常规的发展，97年总产量达到1866万吨，连续4年保持着的10%的增长率，比上年增长12.8%，高于白酒增长幅度10.3个百分点。在我国1997年啤酒产量前20强企业中，产量达到20万吨的企业有12家，比上年增加2家。20强企业产量比上年增长10.9%，占全国啤酒总产量的26.1%。

表1　1997年我国啤酒产量前10强企业排名

排序	企业名称	产量(吨)
1	北京燕京啤酒集团公司	733468
2	青岛啤酒集团有限公司	414767
3	广州珠江啤酒集团公司	350541
4	沈阳华润雪花啤酒有限公司	297167
5	重庆啤酒有限责任公司	272404
6	河南金星啤酒集团有公司	268610
7	哈尔滨啤酒有限公司	252931
8	武汉欧联东西湖啤酒有限公司	247111
9	钱啤集团股份有限公司	235365
10	宣化钟楼啤酒集团有限公司	229423

资料来源：国家统计局

目前我国的啤酒业大致呈以下格局。一种是国字号大型企业，如燕京啤酒集团、青岛啤酒股份有限公司、珠江啤酒集团等，他们控制了国内啤酒市场的一部分主要消费地区和主要消费城市；另一种是被大企业集团收购或走上合资道路的啤酒企业，这种企业虽产销力不比大型企业，但拥有强大财力作后盾，他们在自己的周围市场里已根深蒂固，因此前景也颇为看好，其中合资企业较多。下表可以明确表示：

表2 1997年各啤酒品牌的市场占有率

品牌名称	青岛	蓝带	百威	五星	蓝剑	生力	嘉士顿	贝克	燕京	朝日
市场占有率 %	20.3	14.9	7.7	7.6	5.4	4.3	4.1	3.8	2.2	2.0
销售量份额 %	25.6	13.6	7.1	11.5	12.8	2.8	3.2	3.3	2.5	2.3
市场覆盖面 %	16.8	15.7	8.1	5.1	0.4	5.3	4.7	4.0	1.9	1.7

资料来源：原国内贸易部商业信息中心

由表2可见，老名牌青岛啤酒的业绩有目共睹，以绝对优势稳坐龙头位置。蓝带则异军突起，占据第二位置。百威呈上升势头。

随着人们收入的增加，啤酒消费已无淡季、旺季之分，啤酒消费市场日趋成熟：一、消费品种日趋多样化，从技术上讲有熟啤、生啤、纯生啤、果味啤等；从酒精含量上讲有12度、11度、10度、7度等；从包装上讲有瓶装、易拉罐、桶装等；二、消费对象日益扩大，不但城市居民把啤酒当成液体面包，而且条件稍好的农村，啤酒销量也成倍上升，同时饮用啤酒的女性以每年15%左右的速度增加；三、形成新的消费格局：国啤中除青岛、五星等几个全国名牌畅销全国外，地方名牌国啤形成区域性市场，占领优势；四、自酿啤酒渐为都市部分高收入、高消费人群所接受。

98年夏天的啤酒市场进行了口味大战，浓醇型、纯爽型、清淡型三足鼎立。清淡型的市场前景被看好，可以冰啤作为典型，冰啤酒液清亮、浊度低、抗冻力强、口感柔和、纯正、无杂味、保存期可延长50%等优点而使其受到青睐。国外则开发了多种新型啤酒，如：日本生产的富含蛋白质和维生素及有机酸的玉米啤酒；荷兰研制的浓郁爽口的浓缩啤酒；美国的新品种奶酿啤酒等。更有人预测二十一世纪的啤酒类型有：添加各种调剂的果味和奶味啤酒，具有特定消费对象的专用啤酒，适合健康意识的保健啤酒，及用于烹饪佳肴的烹饪啤酒。总之，各种新型啤酒的开发将为我国啤酒工业带来广阔的发展前景。

虽然我国啤酒产量的增长速度超过了世界上的任何国家和地区，但就目前人均消费水平而言，却还远远低于世界水平，在我国有消费水平并有消费需求的4亿人口中，人均消费水平为12升/年，而德国人均消费138.3升/年，人均消费最高的捷克是159.6升/年，另外还存在数亿人的潜在消费市场及可开发的冬季啤酒市场，因此啤酒在中国无疑是具有潜力的。

白酒

白酒一直是我国酒类消费的主体，1997年全国白酒产量达到800多万吨，比96年上升了2.5%，到去年年底，我国白酒厂家共4.5万家左右，面对供远大于求的市场，全行业感到步履维艰，除少数几家名酒厂家如:茅台，五粮液等仍保持旺销势头，许多厂家均不同程度地呈现了销量或效益下滑的趋势，白酒市场的总体份额近年来每年以近10%的速度下降。去年川酒发展较好，年产量122万吨，五粮液、泸洲老窖、全兴、剑南春、郎酒、沱牌这六家酒厂的酒产量是3.6万吨，白酒总产量34万吨，利税总额31.68亿元，其中利润18.04亿元。

表3 97年白酒市场情况

品牌名称	市场综合占有率%	市场销售量份额%	市场覆盖面%
茅台	14.3	12.0	15.7
五粮液	12.8	10.0	14.7
剑南春	10.4	10.0	10.6
古井贡	8.5	7.9	8.9
郎酒	5.8	4.1	7.0
泸洲老窖	5.7	5.2	6.0
红星二锅头	5.4	8.1	3.6
泰山特曲	4.2	10.1	0.2
酒鬼酒	2.7	2.8	2.7
全兴大曲	2.5	2.2	2.7
其他	27.8	27.6	27.9

资料来源：原国内贸易部商业信息中心

白酒的香型一般分为：浓香型、酱香型、清香型、曲香型、芝麻香型等5种。随着人们生活水平的提高，消费者逐渐喜欢有益于健康的低度白酒，而浓辣的高度白酒逐渐被冷落，我国白酒的消费自1980年开始向低度转化，因此白酒总销量逐年增加。目前我国白酒中，高度酒（50度以上）占20%，中度酒（40—50度）占40%，低度酒（40度以下）占40%。生产和销售的趋势为：高度白酒的产量逐渐减少，低度白酒的产量逐渐增加。

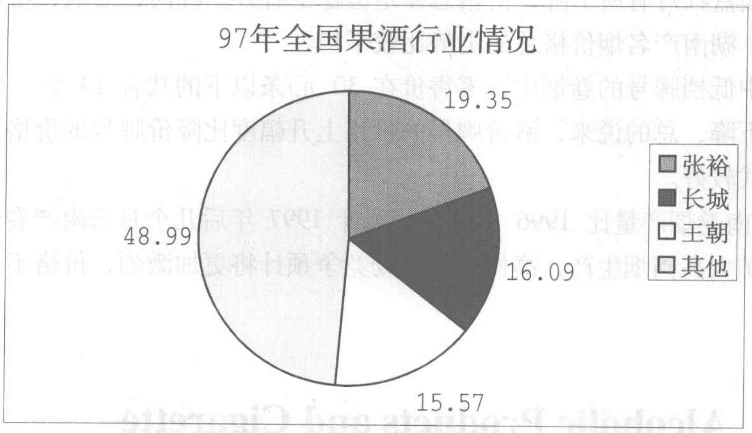
白酒的发展受到政策限制，还受到葡萄酒、啤酒增长快速的冲击。从行业发展规划上看，为制止白酒生产脏乱散的情况，保证酒质、保证酒税，国家准备实行酒类专卖。另外国家反对酿酒业的高耗粮，提倡节约粮食的果酒、黄酒的发展，而限制白酒，国家工商行政管理局颁发的《酒类广告管理办法》对酒类广告进行严格控制，使得白酒在人民生活、交际中的主体地位受到削弱。消费习惯的改变也是一方面，消费者越来越关心身体，不再无节制饮酒，对酒种的选择很严格，造成白酒的饮用量日益减少。预计98年白酒销量依然走低，白酒占饮料酒的比例将继续下降。

葡萄酒

葡萄酒是酒精含量最低、营养成分较高的世界通用饮料酒，素有“百酒之王”的美誉。目前世界葡萄酒年产量约2500万吨，近年来随着我国国民素质的提高，饮酒习惯的不断改善，饮用葡萄酒的人越来越多，全国葡萄酒年产量从1949年的不足200吨增至95年的20万吨，97年产量竟达45万吨。据海关资料统计，97年我国进口葡萄酒达2191.08万升，比上年增长1406.8%，进口酿酒葡萄原汁400.04万升，比上年增长1251.5%，增长速度惊人。

如此看来自96年下半年起的以“干红”为代表的葡萄酒热而造成的巨大市场缺口已基本填平，市场状况为：供求基本平衡，国产优质葡萄酒略有缺口，进口葡萄酒过剩。葡萄酒消费已从初时的追逐流行风尚，逐渐转向注重品牌、讲究口味、讲究质量的理性消费，市场进入平稳发展时期。

目前我国生产葡萄酒的企业达300余家，部分白酒企业也开始转而发展葡萄酒，张裕、长城、王朝为代表的三大国产品牌占据了葡萄酒的大部分市场。张裕是历史最悠久的酿酒公司，它的“夜光杯”中国红、中国白、“丰收”牌桂花陈葡萄酒和“通化”系列在国内外市场占据一定地位；长城葡萄酒有限公司，其产品5次蝉联国家金奖，去年实现销售收入4.5亿元，利税总额达1.47亿元，比96年净增1.9倍；王朝葡萄酒97年产量达1.6万吨，利税超过2亿元。1997年果酒行业情况如下图：（原国家国内贸易局商业信息中心提供）



目前，葡萄酒世界人均年消费量为6升，欧美一些国家达70升，而我国目前年人均消费葡萄酒不到0.3升，仅为世界平均消费水平的2.85%，中国葡萄酒市场潜力巨大。

葡萄酒之所以如此火热，主要因为它的营养价值、保健作用，及国家产业政策的扶植，使得其产销日益兴旺，根据国家的产业政策，果酒发展大有前途：国家对白酒，尤其是高度、烈性白酒采取控制发展政策，而鼓励生产果酒；从原料来源看，酿葡萄酒不耗粮食；从世界潮流看，葡萄酒作为低酒精度保健饮料，已成为市场主流，因此葡萄酒仍属卖方市场，以至外国葡萄酒竞相进入国内。

香烟

1997 年，以深化改革为动力，以扭亏为盈、提高效益为中心，烟草行业进一步强化专卖管理，严格控制"两烟"总量，搞好两个结构调整，狠抓基础，稳中求进，促进了行业持续、稳定、健康发展。农民和地方政府种烟积极性很高，烟叶生产幅度超过国家计划；卷烟产销计划执行情况良好，产销基本平衡；行业实现税利持续增长。

1997 年 1~8 月份，全国共生产卷烟 2237.5 万箱，比上年同期下降 1.3%。烟草系统批发销售卷烟 2183.8 万箱，比上年同期下降 1.5%，其中国内销售 2170.3 万箱，与上年同期 2170.6 万箱基本持平；出口 13.5 万箱，比上年同期下降 68.5%。8 月末工商库存合计 299.4 万箱，其中工业库存 43.9 万箱，商业库存 255.5 万箱。1997 年生产、销售卷烟 3378 万箱，其中国内 3345 万箱，出口 33 万箱。

表 4　1997 年 1-8 月各类卷烟生产销存情

单位：万箱，%

类型	生产			国内销售			商业库存		
	1997 年	1996 年	增长	1997 年	1996 年	增长	1997 年	1996 年	增长
一类	206.7	174.1	18.7	309.2	248.3	24.5	66.6	57.7	15.4
二类	318.2	287.3	10.8	272.6	245.8	10.9	52.6	41.5	26.8
三类	900.1	886.9	1.5	848	766.5	10.6	96.6	86.9	11.2
四类	698.0	751.3	-7.1	355.3	451.6	-21.3	36.2	42.4	-14.8
五类	114.6	166.5	-31.2	18.8	72.0	-73.9	3.6	5.7	-36.4
滤嘴	2147.6	2110.7	1.7	1701.1	1605.5	6.0	242.7	219.7	10.5

注：一类卷烟含增值税（下同）为 7500 元/箱及以上，二类卷烟为 5000~7500 元/箱，三类卷烟为 2500~5000 元/箱，四类卷烟为 1250~2500 元/箱，五类卷烟为 1250 元/箱以下。生产为出产价，国内销售为批发零售价，商业库存为商业购进价。

资料来源：国家信息中心

从 1996 年 8、9 月份开始，部分高档卷烟市场零售价格持续回落，到 1997 年 8 月，大部分高档卷烟价格开始回升。根据中国卷烟批发市场的资料，1997 年 1~8 月沪产软盒中华、牡丹，硬盒双喜卷烟零售价比 1996

年年均价有所上升，双喜和硬盒牡丹有所下降，价格总体走势稳中有升。红河，三塔，特蝴蝶泉，特桂花，石林等，云南产卷烟有所上升，湖南产名烟价格总的走势比较平稳。

据卷烟批发市场统计，中低档牌号的卷烟中，零售价在 30 元/条以下的共有 13 个，其中有 9 个牌号的价格比上年上升，4 个比上年下降，总的说来，涨价牌号的价格上升幅度比降价牌号的价格下降幅度大。价格稳中有升，中低档卷烟市场形式较好。

受计划所限，1997 年云南卷烟产量比 1996 年减少，预计 1997 年后几个月云南产卷烟价格趋稳，不会有大幅度下降。由于各地都在扩大高档烟生产，高档卷烟市场竞争预计将更加激烈，价格不会有大幅度上升。

Alcoholic Products and Cigarette

Alcoholic drink

In year 1997, the output of liquor drinks in China increased continuously with over 8 million tons hard Liquor and 1.866 millions beer. It maintained a growth momentum of 10% and had ranked the second place of the world for the fourth time. The output of wine be further developed after the prosperous 1996.

This year, the characteristics of liquor market will be: The sales of hard Liquor and market share of all liquor will continuously decline; the output of beer will increase again, but its speed will slow down, and the proportion of higher grade beer with good quality will have a rise; the overall tendency of wine will still be optimistic, especially represented by white-dry, red-dry and pink-dry wine; the occupation of yellow rice wine will be quite small in liquor market, and since some area factors, only some products of famous brand are welcomed by consumers in market, and it will be a key year to subsidize the good and eliminate the bad. The sales of brandy and whisky will go on to decrease since not getting free from difficulties; the situation of health care wine will turn better, and the market will be purified, because the Ministry of Hygiene will reconfirm the function of health care wine.

According to people’s consuming habit, there are four trends in the sales of liquor: mild, good quality, popularizing and nutrient.

Drinking liquor is a major trade of Chinese food industry. The guide principle delivered by country “good quality with low costs and more varieties” is to solve the long-existing structural problem, and together with four types of transformation: from cereal liquor to fruit liquor; from strong liquor to mild liquor; from distilled liquor to fermented liquor; from normal liquor to high quality liquor. And thus can enable the structure of drinking liquor trade will be adjusted including diversify varieties and the scale-group of the structure of the enterprises.

Beer

At present, there have been more than 700 enterprises producing beer in our country, but most of them are small factories with annual output below 4000 tons. Only 61 factories can surpass 500 tons in annual output and merely 24 enterprises can produce over 0.1 million tons each year. When entering 1990s, the beer trade of China experienced an extraordinary development with total output of 1.866 million tons in 1997, keeping a 10% increase rate for four years, which was 12.8% more than the previous year and 10.3% higher than the increase rate for four years, which was 12.8% more than the previous year and 10.3% higher than the increase rate of Hard Liquor. Among the top 20 enterprises of 1997, there were 12 had their output reached 0.2 million tons, which were two enterprises more than the last year. The output of the 20 enterprises rose 10.9%, representing 26.1% of the country's total output.

Table 1: Top 10 enterprises of the output of Chinese beer in 1997.

Rank order	Name of Enterprises	Output(tons)
	Beijing Yanjing Beer Group company	733468
2	Tsing Tao Beer Group Limited company	414767
3	Guangzhou Zhujiang Beer Group company	350541
4	Shenyang Chinese Resource Snowflower Beer Limited company	297167
5	Chongqing Beer Limited Liability company	272404
6	Henan Golden star Beer Group Limited company	268610
7	Haerbin Beer Limited company	252931
8	Wuhan Europe-allied East & West Lake Beer Limited company	247111
9	Qian Beer Group Limited Liability company	235365
10	Xuanhua Zhonglou Beer Group Limited company	229423

Source: State Statistical Bureau

The present beer trade of China has an overall outcome of three major patterns: The first is state- owned large enterprises, e.g. Yanjing Beer Group, TsingTao Beer Limited company, Zhujiang Beer Group, etc. They control the major consuming area and cities; the second is the joint ventures, which was purchased by large groups. Although its ability of production and sales cannot catch up with large enterprises, the owned powerful backing of big funds, and they look good in their surrounding market with hopeful prospect, and most of them are joint ventures. Amid the over 700 beer enterprises, 7% are foreign investment enterprises in large scale. Among those 61 enterprises surpassing annual output of 0.1 million tons, 50 or more are cooperating with foreign enterprises, and their market share is more than 25%. The following table can show it more specified:

Table 2: Market share of each brand in 1997.

Brand	Tsing Tao	Blue Ribbon	Budweiser	Five Star	Blue Sword	San Miguel	Carlsberg	Beck's	Yan jing	Asahi
Market share %	20.3	14.9	7.7	7.6	5.4	4.3	4.1	3.8	2.2	2.0
Sales share %	25.6	13.6	7.1	11.5	12.8	2.8	3.2	3.3	2.5	2.3
Market coverage	16.8	15.7	8.1	5.1	0.4	5.3	4.7	4.0	1.9	1.7

Source: Business Information Center of Ministry of Internal Trade.

People begin to pay more and more attention to the "up and down tendency" in beer market, i.e. the increase of the output and the decrease of the number of enterprises. The beer trade develop to intensive scale operation pattern: export increases, while cheap beer decreases, and enterprises transform themselves from the pattern of manufacture operation to capital operation; foreign beer increases while the number of brand decreases; and the market is divided by famous brand.

Accompanied with the increase of income level, the beer consumption has eliminated the differences between off seasons and peak period. Beer consumption of Chinese people has entered a delightful stage: the consuming variety diversifies. Technically, there are ripe beer, raw beer, pure raw beer and beer of fruit flavor; from the content of alcohol, there are 12% , 11%, 10%, 7%; on package, there are bottle package ,tin package and barrel package. Second, consuming objects are enlarging day by day. Beer is not only the "liquid bread" for urban citizens, but also has multiplied sales in good conditional rural area, and the number of women who drink beer increases at a rate around 15%. Third, the formation of new consumption pattern: among national brand beer (except Tsing Tao, Five Star that are sold well in national market), those regional famous beer has formed its own market and gained advantages in certain area. Fourth, self- brewed beer are gradually accepted by those city people with higher income and consumption level.

Although the output of Chinese beer has a fast increasing speed that surpasses any other country of the world, the consumption level of per capita people is far below the world level. In China, among the 400 million people that have consuming ability and consuming demand, the consumption amount per capita people is 12 liter/ year, while the same index is 138.3 liter/year in Germany, and 159.6 liter /year in Czechoslovakia which is the highest of the world. In addition, there is a big potential market about several hundred million people, and the market in off-seasons can also be developed. Therefore, it is no doubt that China has a big potential beer market.

Hard Liquor

Hard Liquor is always the main part of Chinese liquor consumption. In 1997, the output of hard Liquor was beyond 8 billion tons in China, a rounding 2.5% increase over 1996. By the end of the last year there were altogether 45 thousand enterprises that produced hard Liquor in China. Facing the market situation of supply sharply exceeding demand, the whole trade walked with difficulties except several famous brand product, e.g. Moutai, Wuliangye still maintains good momentum. Many enterprises have phenomenon of sales and profits declining in different degree. The total market share of hard Liquor is decreasing at a rate of 10%. The Chuan liquor developed quite good in last year with annual output of 1.22 million tons. Six enterprises- Wuliangye, Luzhoulaojiao, Quanxingdaqu, Jiannanchun, Langjiu and Tuopaidaqu- had a 36 thousand tons' output of famous liquor, and total output of hard Liquor was 0.34 million tons with profits before tax 3.168 billion RMB, and the net profits was 1.804 billion RMB.

There are five types of flavors in hard Liquor: rich aroma, sauce aroma, faint aroma and sesame aroma. As the improvement in people's living standard, consumers like mild hard Liquor that is tasty and can benefit health, meanwhile, the stronger spirit is ignored day by day. The consumption of hard Liquor in China converted into mild type from 1980, so the total sales volume increases year by year. In the present hard Liquor industry. strong liquor (more than 50% alcohol) occupies 20%, moderate liquor (40% -50% alcohol) possesses 40% , and mild liquor (below 40% alcohol) takes 40% of market. The tendency of production and sales is: the decrease of strong hard Liquor output and the increase of mild hard Liquor output.

Table 3: Market situation of hard Liquor in 1997

Brand	Complex market share %	Market sales share %	Market coverage %
Moutai	14.3	12.0	15.7
Wuliangye	12.8	10.0	14.7
Jiannanchun	10.4	10.0	10.6
Gujinggong	8.5	7.9	8.9
Langjiu	5.8	4.1	7.0
Luzhoulaojiao	5.7	5.2	6.0
Red star Erguotou	5.4	8.1	3.6
Taishan Tequ	4.2	10.1	0.2
Tippler spirit	2.7	2.8	2.7
Quanxing Daqu	2.5	2.2	2.7
Others	27.8	27.6	27.9

Source: Business Information Center of Ministry of Internal Trade.

The development of hard Liquor is limited by policy, and smashed by the rapid growth of wine and beer. From the overall arrangement to this industry, the state government is preparing to carry franchisee to eliminate the dirty, disorder and loose situation in hard Liquor manufacture, and to insure the liquor-brew quality and tax from the industry. In addition, the country is against the higher consumption of grain and rice in brew industry, and advocates the development of fruit wine. Yellow rice liquor instead of hard Liquor.

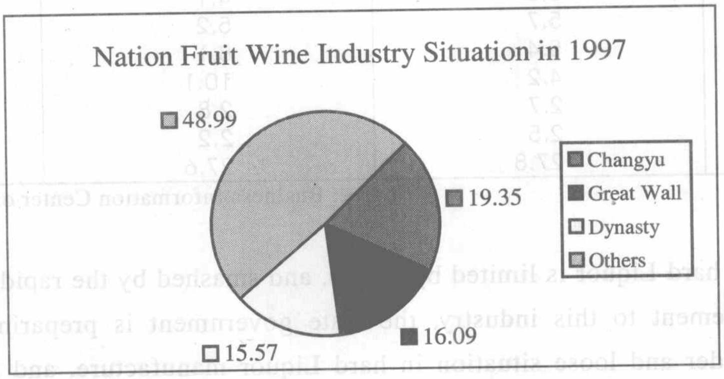
It is predicted that the sales will be in low level, and the proportion of hard Liquor in liquor drinks market will continuously decline, because the government control in consumption by public expense; the changing flavor of people, e.g. young people pursue new varieties; the change of concept cause the decrease of buying liquor as a gift, and those famous brand have high price level or increase price frequently; the hard Liquor production exceeds sales.

Wine

The present wine output of the world is about 2.5 million tons. In recent years , there are more and more people in China drink wine as the improvement in people's quality and drinking habits. The output of wine in China rose to 200 thousand tons in 1995 from the less than 200 tons in 1949, while the output reached 450 thousand tons in 1997. According to the astonishing custom statistics, China imported 21.9108 million liter wine, representing an increase of 1406.8% over the previous year; and imported pure grape nectar 4.0004 million liter to brew wine which increased 1251.5% over the last year.

Thus, the big market gap caused by the representative "red-dry" wine attraction since the second half year of 1996 has been filled up. The market situation is: a general balance between supplies and demand; nationally produced wine is inefficient, while the imported wine has surplus. The wine consumption has changed its original "chasing fashion" purpose, and begins to concentrate on rational consumption, especially on brand, flavor and quality. The market enters a steady developing period.

There are more than 300 enterprises that produce wine in China. Some hard Liquor enterprises begin to produce wine. Three national brand-Changyu, Great Wall and Dynasty-occupy most of the market. Changyu is a wine brew company with a long history. Its "Luminous Cup" , Chinese red, Chinese white, Harvest stored wine fermented with osmanthus flowers, and "Tonghua" series possess a position in inland and overseas market; The Great Wall grape wine limited company has got the National Golden Prize for 5 times, and last year, it gained a sales revenue of 0.45 billion RMB, profits before tax about 0.147 billion RMB, which is 1.9 times more than that of 1996; The output of Dynasty wine in 1997 reached 16 thousand tons, and realized over 0.2 billion RMB profits before tax. The situation of fruit wine industry in 1997 is shown below:



Source: Business Information Center of Ministry of Internal Trade.

At present, the annual wine consumption per capita people of the world is 6 liter, and it reaches 70 liter in European and American developed countries, while the consumption amount is only 0.3 liter per capita people every year in China, which only equals to 2.85% of the average world level. It thus also brings potential demand of wine in China.

Cigarette

In 1997, from January to August, the national output of cigarette was 22,375,000 boxes, 1.3% lower than the same period of 1996. The wholesale of cigarette was 21,838,000 boxes, 1.5% lower than the same period of 1996; in which , the internal sales volume was 21,703,000 boxes, nearly the same as the same period of 1996 (21,766,000 boxes); the export volume was 135,000 boxes, 68.5% lower than the same period of 1996. At the end of August, the total industrial and commercial stock was 2,994,000 boxes; in which, industrial stock was 439,000 boxes while commercial stock was 2,555,000 boxes. In 1997,the production and marketing of cigarette was 33,780,000 boxes, in which the internal volume was 33,450,000 boxes while the export volume was 330,000 boxes.

From August to September1996, the retail prices of some high grade cigarette had kept decreasing. In August 1997,most of the prices of the high-grade cigarette began to rise again. According to the information from Chinese cigarette wholesale market, in January ~ August, 1997, the retail prices of Zhonghua and Peony of soft box and Shuangxi of hard box that made in Shanghai risen comparing with the annual price was stable rise. The prices of Honghe, Santa, Special Hudiequan, Special Guihua and Yunnan Shilin rised, while the prices of other brands all dropped, Yunyan of hard box, Hongtashan of soft box and A Shi ma of hard box had a descend rate of more than 10%. The trend of prices of famous cigarette made in Hunan was stable.

Surveys from cigarette wholesale market showed than in the middle and low grade cigarette, there were thirteen kinds of cigarette whose retail prices were under 30 RMB per bar . The prices of nine kinds of cigarette risen comparing with that of the previous year, while the prices of four kinds of cigarette dropped. In general, the range of price rising was larger than that of price dropping. The price was stably rising, and the market condition of middle and low-grade cigarette was fairly good.

Table 4: The situation of production and marketing and stock of cigarette, January ~ August,1998

Unit: ten-thousand boxes, (%)

Type	Production			Internal marketing			commercial stock		
	1997	1996	Growth rate	1997	1996	Growth rate	1997	1996	Growth rate
The first type	206.7	174.1	18.7	309.2	248.3	24.5	66.6	57.7	15.4
The first type	318.2	287.3	10.8	272.6	245.8	10.9	52.6	41.5	26.8
The first type	900.1	886.9	1.5	848	766.5	10.6	96.6	86.9	11.2
The first type	698.0	751.3	-7.1	355.3	451.6	-21.3	36.2	42.4	-14.8
The first type	114.6	166.5	-31.2	18.8	72.0	-73.9	3.6	5.7	-36.4
Filter-tipped cigarette	2147.6	2110.7	1.7	1701.1	1605.5	6.0	242.7	219.7	10.5

Note : The VAT (value -added tax) of the first type of cigarette is 7,500 RMB and more than 7,500 RMB per box; the VAT of the second type of cigarette is 5,000-7,000 RMB per box; the VAT of the third type of cigarette is 2,500 ~ 5,000RMB per box; the VAT of the forth type of cigarette is 1,250 ~ 2,500 RMB per box; the VAT of the fifth type of cigarette is less than 1,250 RMB per box.. The price of production is producer price, the price of internal marketing is wholesale and retail price; the price of commercial stock is commercial buyer price.

Source of information : National Information Center

Limited by the plan, in 1997, the output of cigarette made in Yunnan was less than that of 1996. It was estimated that in the left months of 1997,the prices of cigarette made in Yunnan would be stable, and without dropping by a margin. Since the produce of high grade cigarette was in creasing all over the country, the market competition of high grade cigarette would be more and more fiercely, and price rising by a big margin would not take place.

1. 啤酒 / Beer

● 北京 / Beijing

1-1 最近三个月饮用频率的比例/ Proportion of the Sample Consuming Beer in the Last Three Months

	人数 Number	百分比 Percent
天天喝 daily	150	15.1
一周 3 次或以上 3 times or over per week	205	20.7
一周 1 次左右 once a week	173	17.5
一个月 2～3 次 2 or 3 times a month	113	11.4
一个月 1 次或以下 once a month or below	96	9.7
没喝过 never	254	25.6

n=991

1-2 最常用品牌排名/ Ranking of the Most Frequently Used Brands

排名 BrandRanking	品牌 Brands	人数 Number	百分比 Percent
1	燕京 Yanjing	683	92.8
2	青岛 Tsing Tao	13	1.8
2	五星 Five Star	13	1.8
3	北京 Beijing	10	1.4
4	百威 Budweiser	4	0.5
5	喜力 Heineken	3	0.4

n=736

1-3 样本、男性各年龄层、女性各年龄层的常用品牌/ The Most Frequently Used Brands by the Whole Sample, Age and Gender Groups

	人数 Number	第一品牌及百分比 1st/ percent	第二品牌及百分比 2nd/ percent	第三品牌及百分比 3rd/ percent
样本 Sample	736	**燕京 Yanjing(92.8)**	**青岛 Tsing Tao(1.8)** **五星 Five Star(1.8)**	**北京 Beijing(1.4)**
男性 Male	423	**燕京 Yanjing(93.6)**	**五星 Five Star(1.9)**	**青岛 Tsing Tao(1.7)**
16~24 岁 Age	57	燕京 Yanjing(89.5)	五星 Five Star(3.5)	百威 Budweiser(1.8) 青岛 Tsing Tao(1.8) 生力 San Miguel(1.8) 喜力 Heineken(1.8)
25~34 岁 Age	133	燕京 Yanjing(96.2)	五星 Five Star(1.5)	北京 Beijing(0.8) 贝克 Beck's(0.8) 青岛 Tsing Tao(0.8)
35~44 岁 Age	122	燕京 Yanjing(94.3)	五星 Five Star(2.5)	百威 Budweiser(0.8) 北京 Beijing(0.8) 朝日/舒波乐 Asahi(0.8) 青岛 Tsing Tao(0.8)
45~54 岁 Age	74	燕京 Yanjing(89.2)	青岛 Tsing Tao(5.4)	百威 Budweiser(1.4) 北京 Beijing(1.4) 虎牌 Tiger(1.4) 红星 Red Star(1.4)
55~60 岁 Age	37	燕京 Yanjing(97.3)	五星 Five Star(2.7)	
女性 Female	313	**燕京 Yanjing(91.7)**	**北京 Beijing(2.2)**	**青岛 Tsing Tao(1.9)**
16~24 岁 Age	35	燕京 Yanjing(80.0)	北京 Beijing(5.7)	百威 Budweiser(2.9) 朝日/舒波乐 Asahi(2.9) 青岛 Tsing Tao(2.9) 五星 Five Star(2.9) 喜力 Heineken(2.9)
25~34 岁 Age	98	燕京 Yanjing(91.8)	青岛 Tsing Tao(3.1)	北京 Beijing(1.0) 生力 San Miguel(1.0) 五星 Five Star(1.0) 喜力 Heineken(1.0)
35~44 岁 Age	95	燕京 Yanjing(93.7)	五星 Five Star(3.2)	北京 Beijing(1.1) 蓝带 Blue Ribbon(1.1) 青岛 Tsing Tao(1.1)
45~54 岁 Age	63	燕京 Yanjing(93.7)	北京 Beijing(3.2)	贝克 Beck's(1.6) 青岛 Tsing Tao(1.6)
55~60 岁 Age	22	燕京 Yanjing(95.5)	北京 Beijing(4.5)	

1-4 理想品牌排名/ Ranking of the Ideal Brands

排名 BrandRanking	品牌 Brands	人数 Number	百分比 Percent
1	燕京 Yanjing	803	81.0
2	青岛 Tsing Tao	45	4.5
3	五星 Five Star	30	3.0
4	北京 Beijing	18	1.8
5	百威 Budweiser	8	0.8
5	贝克 Beck's	8	0.8
6	蓝带 Blue Ribbon	7	0.7
7	喜力 Heineken	5	0.5
7	嘉士伯 Carlsberg	5	0.5
8	生力 San Miguel	4	0.4

n=991

1-5 样本、男性各年龄层、女性各年龄层最近三个月有无购买的比例/ Purchasing in the Last Three Months by the Whole Sample, Age and Gender Groups

	人数 Number	买过 yes	没买过 no
样本 Sample	991	74.1	25.9
男性 Male	493	82.6	17.4
16~24 岁 Age	78	66.7	33.3
25~34 岁 Age	151	84.1	15.9
35~44 岁 Age	140	85.7	14.3
45~54 岁 Age	83	88.0	12.0
55~60 岁 Age	41	85.4	14.6
女性 Female	498	65.7	34.3
16~24 岁 Age	88	39.8	60.2
25~34 岁 Age	140	73.6	26.4
35~44 岁 Age	138	71.7	28.3
45~54 岁 Age	89	70.8	29.2
55~60 岁 Age	43	62.8	37.2

1-6 样本、男性各年龄层、女性各年龄层最近三个月的饮用频率/ Frequencies of Consuming Beer in the Last Three Months by the Whole Sample, Age and Gender Groups

	人数 Number	天天喝 daily	一周3次或以上 3 times or over per week	一周1次左右 once a week	一个月2~3次 2 or 3 times a month	一个月1次或以下 once a month or below	没喝过 never
样本 Sample	991	15.1	20.7	17.5	11.4	9.7	25.6
男性 Male	493	19.3	26.8	22.1	11.4	6.5	14.0
16~24 岁 Age	78	7.7	17.9	19.2	14.1	14.1	26.9
25~34 岁 Age	151	16.6	33.1	21.9	11.9	4.6	11.9
35~44 岁 Age	140	25.0	27.9	22.9	7.9	4.3	12.1
45~54 岁 Age	83	20.5	27.7	24.1	9.6	7.2	10.8
55~60 岁 Age	41	29.3	14.6	22.0	19.5	4.9	9.8
女性 Female	498	11.0	14.7	12.9	11.4	12.9	37.1
16~24 岁 Age	88	2.3	4.5	8.0	9.1	15.9	60.2
25~34 岁 Age	140	9.3	20.7	14.3	12.1	13.6	30.0
35~44 岁 Age	138	13.8	15.9	15.9	13.8	9.4	31.2
45~54 岁 Age	89	16.9	15.7	13.5	12.4	12.4	29.2
55~60 岁 Age	43	14.0	9.3	7.0	4.7	16.3	48.8

1-7 样本、男性各年龄层、女性各年龄层的品牌习惯/ Brand Habit in Consuming Beer by the Whole Sample, Age and Gender Groups

	人数 Number	基本固定饮用一个牌子 used in only one brand	比较固定地饮用两三个牌子 used in two or three brands	基本上没有固定哪个牌子 no brand preference
样本 Sample	737	79.1	16.7	4.2
男性 Male	424	79.0	16.3	4.7
16~24 岁 Age	57	64.9	26.3	8.8
25~34 岁 Age	133	79.7	17.3	3.0
35~44 岁 Age	123	82.1	15.4	2.4
45~54 岁 Age	74	85.1	10.8	4.1
55~60 岁 Age	37	75.7	10.8	13.5
女性 Female	313	79.2	17.3	3.5
16~24 岁 Age	35	68.6	25.7	5.7
25~34 岁 Age	98	76.5	20.4	3.1
35~44 岁 Age	95	81.1	13.7	5.3
45~54 岁 Age	63	84.1	14.3	1.6
55~60 岁 Age	22	86.4	13.6	0.0

1-8 选择该类商品的考虑因素/ Ranking of the Considerations in Purchasing

注：本题为多选题，合计百分比超过 100%（Multiple answers）

排名 Ranking	考虑因素 Considerations	人次 Person-time	百分比 Percent
1	口味好 pleasant taste	445	60.4
2	价格适中 reasonable price	334	45.3
3	有名的牌子 famous brand	322	43.7
4	购买方便 easy to buy	178	24.2
5	生产日期 date of production	167	22.7
6	只是由于习惯 out of habit	102	13.8
7	生产地 place of production	41	5.6
8	单位发的 offered by the working unit	29	3.9
9	广告影响 influence of advertising	17	2.3
10	别人送的 given by other people	14	1.9
11	朋友推荐 introduction of friends	13	1.8
12	有优惠条件 with preferential terms	6	0.8
13	包装吸引人 appealing package	3	0.4
13	售货员介绍 introduced by the shop assistants	3	0.4

n=737

1-9 样本、男性各年龄层、女性各年龄层最常饮用的包装形式/ Package Types of the Consumed Beer by the Whole Sample, Age and Gender Groups

	人数 Number	瓶装 bottle	听装 tin	散装扎啤 jar without package	其它 others
样本 Sample	737	82.8	16.7	0.5	0.0
男性 Male	424	84.0	15.3	0.7	0.0
16~24 岁 Age	57	75.4	24.6	0.0	0.0
25~34 岁 Age	133	87.2	11.3	1.5	0.0
35~44 岁 Age	123	87.8	12.2	0.0	0.0
45~54 岁 Age	74	78.4	20.3	1.4	0.0
55~60 岁 Age	37	83.8	16.2	0.0	0.0
女性 Female	313	81.2	18.5	0.3	0.0
16~24 岁 Age	35	80.0	20.0	0.0	0.0
25~34 岁 Age	98	84.7	14.3	1.0	0.0
35~44 岁 Age	95	78.9	21.1	0.0	0.0
45~54 岁 Age	63	81.0	19.0	0.0	0.0
55~60 岁 Age	22	77.3	22.7	0.0	0.0

1-10 样本、男性各年龄层、女性各年龄层最常饮用的口味/ The Taste of the Consumed Beer by the Whole Sample, Age and Gender Groups

	人数 Number	清爽型 fresh and cool	醇厚型 mellow	其它 others
样本 Sample	737	95.0	5.0	0.0
男性 Male	424	94.3	5.7	0.0
16~24 岁 Age	57	93.0	7.0	0.0
25~34 岁 Age	133	97.0	3.0	0.0
35~44 岁 Age	123	93.5	6.5	0.0
45~54 岁 Age	74	97.3	2.7	0.0
55~60 岁 Age	37	83.8	16.2	0.0
女性 Female	313	95.8	4.2	0.0
16~24 岁 Age	35	97.1	2.9	0.0
25~34 岁 Age	98	98.0	2.0	0.0
35~44 岁 Age	95	94.7	5.3	0.0
45~54 岁 Age	63	93.7	6.3	0.0
55~60 岁 Age	22	95.5	4.5	0.0

1-11 样本、男性各年龄层、女性各年龄层最常饮用的场合/ Settings of Consumption by the Whole Sample, Age and Gender Groups

注：本题为多选题，合计百分比超过 100%（Multiple answers）

	人数 Number	口渴时 when thirsty	平时吃饭喝 at dinner	宴席、聚会喝 at banquet	去酒吧喝 at bar	外出/旅游时 outing/traveling	其它 others
样本 Sample	737	5.7	68.4	49.1	3.3	4.1	0.3
男性 Male	424	6.4	71.9	46.5	3.1	4.0	0.5
16~24 岁 Age	57	3.5	54.4	64.9	8.8	1.8	0.0
25~34 岁 Age	133	4.5	70.7	51.9	3.8	3.0	0.0
35~44 岁 Age	123	10.6	78.9	37.4	0.8	4.9	0.0
45~54 岁 Age	74	5.4	78.4	35.1	2.7	5.4	1.4
55~60 岁 Age	37	5.4	67.6	51.4	0.0	5.4	2.7
女性 Female	313	4.8	63.6	52.7	3.5	4.2	0.0
16~24 岁 Age	35	0.0	42.9	60.0	8.6	5.7	0.0
25~34 岁 Age	98	6.1	64.3	49.0	7.1	6.1	0.0
35~44 岁 Age	95	4.2	65.3	58.9	1.1	4.2	0.0
45~54 岁 Age	63	6.3	69.8	47.6	0.0	1.6	0.0
55~60 岁 Age	22	4.5	68.2	45.5	0.0	0.0	0.0

1-12 重度消费者人口分布/ Demographics of the Heavy Consumers

	人数 Number	16-24 岁 Age	25-34 岁 Age	35-44 岁 Age	45-54 岁 Age	55-60 岁 Age
样本 Sample	528	9.1	32.2	32.0	19.1	7.6
男性 Male	336	10.4	32.1	31.5	17.9	8.0
天天喝 daily	95	6.3	26.3	36.8	17.9	12.6
一周 3 次或以上 3 times or over a week	132	10.6	37.9	29.5	17.4	4.5
一周 1 次左右 once a week	109	13.8	30.3	29.4	18.3	8.3
女性 Female	192	6.8	32.3	32.8	21.4	6.8
天天喝 daily	55	3.6	23.6	34.5	27.3	10.9
一周 3 次或以上 3 times or over a week	73	5.5	39.7	30.1	19.2	5.5
一周 1 次左右 once a week	64	10.9	31.3	34.4	18.8	4.7

1-13 不同消费者层的常用品牌/ The Most Frequently Used Brands by Market Segments

1-13-1 时尚流行指标/ Fads Popular Index

	人数 Number	第一品牌及百分比 1st/percent	第二品牌及百分比 2nd/percent	第三品牌及百分比 3rd/percent
样本 Sample	730	燕京 Yanjing(92.7)	青岛 Tsing Tao(1.8) 五星 Five Star(1.8)	北京 Beijing(1.4)
平实生活指向 simple living orientation	399	燕京 Yanjing(94.0)	五星 Five Star(2.0)	北京 Beijing(1.5)
时尚流行指向 fashion orientation	331	燕京 Yanjing(91.2)	青岛 Tsing Tao(2.7)	五星 Five Star(1.5)