



2020年中国乳制品行业数据中台研究报告

China Dairy Industry Data Mid-Office Solutions Report 2020

亿欧智库 www.iyiou.com/intelligence

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研究背景

中国乳制品行业规模超三千亿元，自20世纪90年代起，经历蓄力、爆发、冷却调整、高端国产化四大阶段，目前中国乳制品行业面临增长、升级、多样化的新时代痛点，其背后体现了全行业对精细化运营、全域优化、快速响应的需求，传统的数字化解决方案已经无法满足行业需求，数据中台能有效助力中国乳制品行业全域+敏捷数字化发展。

研究目的

- ◆ 第一，对中国乳制品行业的发展阶段、新时代痛点进行分析，深入探究中国乳制品行业转型方向；
- ◆ 第二，对中国乳制品行业各个环节的数字化现状进行分析，揭示乳制品行业数字化进程和发展方向；
- ◆ 第三，阐释数据中台对中国乳制品行业现阶段的适用性，同时分析数据中台的方法论、架构和价值点，结合具体案例，揭示数据中台对乳制品行业数字化转型的深刻意义。

研究方法

为达到研究目的，本次研究主要使用2种研究方法：

- ◆ 第一，亿欧智库基于自身对行业长期观察获得的行业知识，通过**桌面研究 (Desk Research)** 的方式，对中国乳制品多家上市公司全流程、多环节数字化进程做深度分析与总结，形成本报告的基础观点；
- ◆ 第二，亿欧智库通过对数据中台厂商多位专家进行**深度访谈 (Experts IDI)**，充分听取行业专家见解，形成客观、有深度的研究观点。

通过本次研究，亿欧智库主要得出了以下5个结论：

- ◆ 中国乳制品行业规模超三千亿元，自20世纪90年代起，经历蓄力、爆发、冷却调整阶段，目前积极向高端健康，国产占比提升方向发展，但渠道、品牌、产品的多元化加剧了乳制品市场竞争，暴露了中国乳制品行业增长、升级、多样化等新时代痛点，进一步体现了全行业对精细化运营、全域优化、快速响应的改进需求。
- ◆ **中国乳制品行业数字化转型已经走过三个阶段，行业效率提升是持续推进数字化转型发展的动力。**其中牧场及奶源采集环节，大型牧场奶源自动化、数字化管理改造较早，普及程度较高；生产制造环节，单点自动化已基本实现，部分环节数字化程度较高，但全流程数字工厂仍然处在早期；渠道供应环节，分销模式仍占主体，经销体系数字化仍在早期；直销渠道数字化程度较高，但孤岛现象严重；消费者连接环节，仍然依赖于线下渠道，数字化使用效率不高，数据分散、模糊、不可控。
- ◆ **基于单点的数字化已无法满足行业的需求，中国乳制品行业需要进入以全域敏捷为特征的数字化转型的新阶段。**
- ◆ **数据中台价值能有效助力乳制品行业全域+敏捷数字化发展。**数据中台的构建基于新的技术、理念和方法论，可解决传统数仓的系统建设问题，有效适应新变化，是企业数字化系统迈向数据智能的重要演进之路。**亿欧智库将数据中台定义为：企业内支持高效构建全域数据资产、敏捷赋能多类业务、智能服务全流程人员的数据智能系统。**
- ◆ 乳制品数据中台目前主要聚焦消费者连接环节，逐步产业链中上游环节渗透。**数据中台目前已助力部分乳制品品牌进入消费者连接的新阶段，实现全域数据回传、敏捷支持、用户画像、精准运营等，使用效果显著。**

In the study, we mainly reached the following conclusions:

- China dairy market has witnessed a steady growth since the beginning of 1990s, and with the 2008 Melamine scandal, the market experienced a short period of turbulence and went through a restructuring process. The market gradually shifted from scale growth to quality upgrading, together with more high-end brands and a growing proportion of domestic products. With a market size over 300 billion RMB, however, the intense competition in channels, brands and products reflects pinpoints and needs in refined operations, optimization and quick response.
- **China dairy industry has gone through three stages of digital transformation**, and efficiency will be the driving force in the future. In the milk collection process, automation and digitalization have been earlier adopted by large dairy farms. In manufacturing process, only part of it has been automated and highly digitized, digital transformation is still in the early stage. Most dairy companies take distribution sales as the primary channel while direct sales as a supplement. The distribution system is still in the early stage of digitalization, while direct sales is relatively mature but with serious isolation between channels. On the consumer side, offline channels are less efficient in digital management, thus data is isolated, fuzzy and hard to control.
- **China dairy industry is urged to go further in digital transformation, that is, a new stage of universal and agile digitalization.**
- **Data Mid-Office Solutions perfectly fulfils the need of universal and agile digitalization.** It can avoid repeated system constructions – a problem raised by traditional Data Warehouse – and thus will be the lighthouse to the advancement of Smart Data System. **We define Data Mid-Office Solutions as an advanced Data System which can help build up universal data asset, enable multiple types of business and provide smart services to people throughout the whole supply chain.**
- At present, Dairy Data Mid-Office Solutions mainly focuses on the consumer side, and gradually penetrates to the supply chain management. It has been adopted by several dairy companies, providing data retrieve service, agile support, detailed portrait and accurate operations.

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Case of Data Mid-Office Solutions in China Dairy Industry——Alicloud Data Mid-Office

Part 1. 中国乳制品行业数字化转型趋势

Digital Transformation Trend in China Dairy Industry

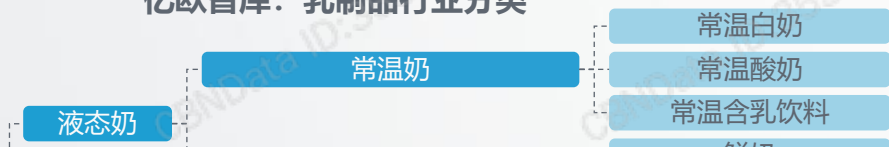
1.1 中国乳制品行业发展情况

The Background of China Dairy Industry

中国乳制品行业规模超三千亿元，液态奶种类众多，占据中国90%以上的乳制品主流市场

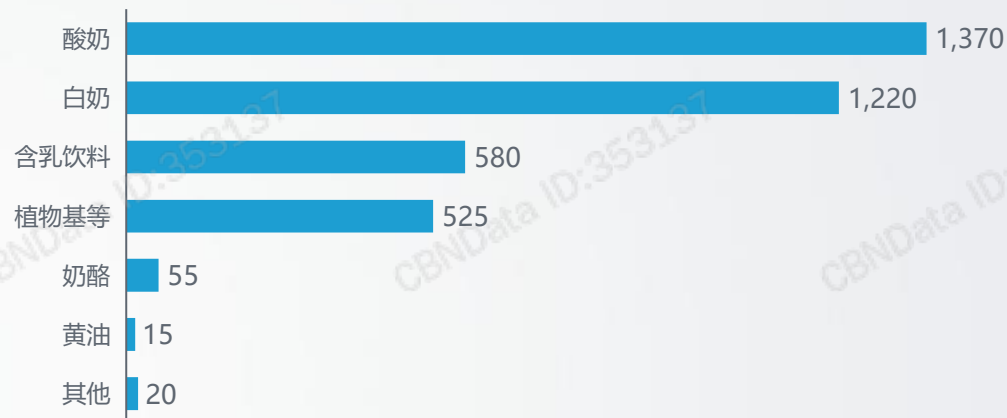
- ◆ **中国市场拥有最丰富的乳制品品类：** 乳制品是指使用牛乳或羊乳及其加工制品为主要原料加工制作的产品，主要包括液态奶、奶粉、炼乳、干酪和其他乳制品。目前我国单液态奶就出现13个细分品类，跨界产品层出不穷，使我国企业在乳品创新、场景拓展、功能加持等方面，拥有更多可延展的机会。
- ◆ **乳制品行业市场规模庞大，液态奶占绝对主流：** 2018年乳制品市场规模达到3590.41亿元，总销量3099万吨，同比增长1.0%。液态奶占比稳定在90%以上。

亿欧智库：乳制品行业分类



亿欧智库：2018年中国乳制品细分市场零售额

(单位：亿元人民币)



亿欧智库：中国乳制品销量构成

(单位：千吨)



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