



# Health and Wellness in China

November 2023

Table of Contents

## Health and Wellness in China

### EXECUTIVE SUMMARY

Overview

### DISCLAIMER

## HW Hot Drinks in China

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Consumer interest in fortified/functional hot drinks drives growth in 2022

Continued concern not only about COVID-19, but also other infectious diseases, means immune support leads health and wellness hot drinks

Interest in particular diets boosts interest in the keto claim within health and wellness hot drinks

#### PROSPECTS AND OPPORTUNITIES

The growing importance of hot drinks in providing health benefits to consumers

Natural likely to show significant promise in health and wellness hot drinks during the forecast period as illness prevention remains paramount

As more consumers seek to take care of their health, no allergens is set to show promise over the forecast period

#### CATEGORY DATA

Table 1 - Sales of Hot Drinks by Health and Wellness Type: Value 2019-2022

Table 2 - Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2019-2022

Table 3 - Company Shares of Organic Hot Drinks (Biggest HW Type in Global Hot Drinks): % Value 2019-2022

Table 4 - Company Shares of Natural Hot Drinks (2nd Biggest HW Type in Global Hot Drinks): % Value 2019-2022

Table 5 - Company Shares of Gluten Free Hot Drinks (3rd Biggest HW Type in Global Hot Drinks): % Value 2019-2022

Table 6 - Company Shares of Good Source of Vitamins Hot Drinks (4th Biggest HW Type in Global Hot Drinks): % Value 2019-2022

Table 7 - Company Shares of No Allergens Hot Drinks (5th Biggest HW Type in Global Hot Drinks): % Value 2019-2022

Table 8 - Forecast Sales of Hot Drinks by Health and Wellness Type: Value 2022-2027

Table 9 - Forecast Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2022-2027

## HW Soft Drinks in China

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Rising demand for better for you soft drinks amongst health-conscious consumers leads to product development

No sugar holds first place within health and wellness soft drinks in 2022

High fibre records positive growth due to increased awareness of juice's health benefits

#### PROSPECTS AND OPPORTUNITIES

Demand for health and immunity set to drive growth for fortified/functional soft drinks

No sugar also likely to show promise in health and wellness soft drinks during the forecast period due to the "Three Reduce" policy

Brain health and memory set to rise, with gamers and older people two consumer groups with potential

#### CATEGORY DATA

Table 10 - Sales of Soft Drinks by Health and Wellness Type: Value 2019-2022

Table 11 - Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2019-2022

Table 12 - Company Shares of No Sugar Soft Drinks (Biggest HW Type in Global Soft Drinks): % Value 2019-2022

Table 13 - Company Shares of Energy Boosting Soft Drinks (2nd Biggest HW Type in Global Soft Drinks): % Value 2019-2022

Table 14 - Company Shares of Natural Soft Drinks (3rd Biggest HW Type in Global Soft Drinks): % Value 2019-2022

Table 15 - Company Shares of Good Source of Vitamins Soft Drinks (4th Biggest HW Type in Global Soft Drinks): % Value 2019-2022

Table 16 - Forecast Sales of Soft Drinks by Health and Wellness Type: Value 2022-2027

Table 17 - Forecast Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2022-2027

## HW Snacks in China

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

2022 marks a strong starting point for dairy free ice cream

Although leading health and wellness snacks, no sugar snacks maintains decline due to concerns about over-processing and taste

Due to concerns about health and weight, no fat records positive growth in 2022

#### PROSPECTS AND OPPORTUNITIES

Low fat and no fat set to increase in significance within health and wellness snacks as health concerns rise

High protein set to drive growth as consumers look to maintain or boost their health

Good source of vitamins one to watch as consumers seek to improve their metabolism

#### CATEGORY DATA

Table 18 - Sales of Snacks by Health and Wellness Type: Value 2019-2022

Table 19 - Sales of Snacks by Health and Wellness Type: % Value Growth 2019-2022

Table 20 - Company Shares of Gluten Free Snacks (Biggest HW Type in Global Snacks): % Value 2019-2022

Table 21 - Company Shares of Vegetarian Snacks (2nd Biggest HW Type in Global Snacks): % Value 2019-2022

Table 22 - Company Shares of Organic Snacks (3rd Biggest HW Type in Global Snacks): % Value 2019-2022

Table 23 - Company Shares of Vegan Snacks (4th Biggest HW Type in Global Snacks): % Value 2019-2022

Table 24 - Company Shares of No Allergens Snacks (5th Biggest HW Type in Global Snacks): % Value 2019-2022

Table 25 - Forecast Sales of Snacks by Health and Wellness Type: Value 2022-2027

Table 26 - Forecast Sales of Snacks by Health and Wellness Type: % Value Growth 2022-2027

## HW Dairy Products and Alternatives in China

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

High protein remains a popular claim in dairy products and alternatives in 2022

Probiotic accounts for the highest sales within health and wellness dairy products and alternatives as consumers seek to boost their immunity

Keto sees rising interest within health and wellness dairy products and alternatives, as more consumers turn away from a carb-heavy diet

#### PROSPECTS AND OPPORTUNITIES

Further regulation on food safety will lead to changes in formulations and labelling

As consumers look to boost their metabolism, good source of minerals likely to show the most promise in health and wellness dairy products and alternatives

Plant-based expected to record good growth

#### CATEGORY DATA

Table 27 - Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2019-2022

Table 28 - Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2019-2022

Table 29 - Company Shares of Organic Dairy Products and Alternatives (Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2022

Table 30 - Company Shares of Good Source of Minerals Dairy Products and Alternatives (2nd Biggest HW Type in Global Dairy Products and Alternatives): % V

Table 31 - Company Shares of Gluten Free Dairy Products and Alternatives (3rd Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-20

Table 32 - Company Shares of Lactose Free Dairy Products and Alternatives (4th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2

Table 33 - Company Shares of Low Fat Dairy Products and Alternatives (5th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2022

Table 34 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2022-2027

Table 35 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2022-2027

## HW Cooking Ingredients and Meals in China

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Better for you prevails in cooking ingredients and meals

Vegetarian accounts for the highest sales within health and wellness cooking ingredients and meals as the importance of health rises

Low salt records sales rise due to the impact of “Three Reduce” and resultant health concerns

#### PROSPECTS AND OPPORTUNITIES

Clean label will be one to watch, as Chinese consumers’ awareness of health and food safety rises, while regulations are set to tighten

Vegetarian set to see promising absolute growth in health and wellness cooking ingredients and meals as the consumer base expands

No salt expected to record growth as government campaigns raise health concerns, and legislative pressure is set to intensify

#### CATEGORY DATA

Table 36 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2019-2022

Table 37 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2019-2022

Table 38 - Company Shares of Organic Cooking Ingredients and Meals (Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 39 - Company Shares of Gluten Free Cooking Ingredients and Meals (2nd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 40 - Company Shares of Vegetarian Cooking Ingredients and Meals (3rd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 41 - Company Shares of Vegan Cooking Ingredients and Meals (4th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 42 - Company Shares of Natural Cooking Ingredients and Meals (5th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 43 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2022-2027

Table 44 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2022-2027

## HW Staple Foods in China

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Concerns about sugar drive category switching and product development

No sugar leads sales in health and wellness staple foods, as “Three Reduce” raises awareness of dangers of overconsumption of sugar

Keto shows positive growth within health and wellness staple foods in 2022 as more consumers follow a specific ketogenic diet

#### PROSPECTS AND OPPORTUNITIES

Clean label will continue to rise in staple foods

Vegetarian staple foods to show growth in health and wellness staple foods, as these are consumed by a wider group than just vegetarians

Good source of omega 3s expected to record a rise in sales as consumers look to improve their general health

#### CATEGORY DATA

Table 45 - Sales of Staple Foods by Health and Wellness Type: Value 2019-2022

Table 46 - Sales of Staple Foods by Health and Wellness Type: % Value Growth 2019-2022

Table 47 - Company Shares of Gluten Free Staple Foods (Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 48 - Company Shares of Organic Staple Foods (2nd Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 49 - Company Shares of High Fibre Staple Foods (3rd Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 50 - Company Shares of Vegetarian Staple Foods (4th Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 51 - Forecast Sales of Staple Foods by Health and Wellness Type: Value 2022-2027

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/health-and-wellness-in-china/report](http://www.euromonitor.com/health-and-wellness-in-china/report).