



Fresh Food in China

December 2023

Table of Contents

Fresh Food in China

EXECUTIVE SUMMARY

Fresh food in 2023: The big picture

2023 key trends

Retailing developments

What next for fresh food?

MARKET DATA

Table 1 - Total Sales of Fresh Food by Category: Total Volume 2018-2023

Table 2 - Total Sales of Fresh Food by Category: % Total Volume Growth 2018-2023

Table 3 - Retail Sales of Fresh Food by Category: Volume 2018-2023

Table 4 - Retail Sales of Fresh Food by Category: % Volume Growth 2018-2023

Table 5 - Retail Sales of Fresh Food by Category: Value 2018-2023

Table 6 - Retail Sales of Fresh Food by Category: % Value Growth 2018-2023

Table 7 - Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2018-2023

Table 8 - Retail Distribution of Fresh Food by Format: % Volume 2018-2023

Table 9 - Forecast Total Sales of Fresh Food by Category: Total Volume 2023-2028

Table 10 - Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2023-2028

Table 11 - Forecast Retail Sales of Fresh Food by Category: Volume 2023-2028

Table 12 - Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2023-2028

Table 13 - Forecast Retail Sales of Fresh Food by Category: Value 2023-2028

Table 14 - Forecast Retail Sales of Fresh Food by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Eggs in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price rises continue to drive dynamic retail value growth of eggs in 2023

Health claims are on the rise, increasing the penetration of various egg types in China

PROSPECTS AND OPPORTUNITIES

Processed options offer potential competition to fresh eggs

Health trend to drive new product development

Summary 2 - Major Processors of Eggs 2023

CATEGORY DATA

Table 15 - Total Sales of Eggs: Total Volume 2018-2023

Table 16 - Total Sales of Eggs: % Total Volume Growth 2018-2023

Table 17 - Retail Sales of Eggs: Volume 2018-2023

Table 18 - Retail Sales of Eggs: % Volume Growth 2018-2023

Table 19 - Retail Sales of Eggs: Value 2018-2023

Table 20 - Retail Sales of Eggs: % Value Growth 2018-2023

Table 21 - Retail Sales of Eggs by Packaged vs Unpackaged: % Volume 2018-2023

Table 22 - Forecast Total Sales of Eggs: Total Volume 2023-2028

Table 23 - Forecast Total Sales of Eggs: % Total Volume Growth 2023-2028

Table 24 - Forecast Retail Sales of Eggs: Volume 2023-2028

Table 25 - Forecast Retail Sales of Eggs: % Volume Growth 2023-2028

Table 26 - Forecast Retail Sales of Eggs: Value 2023-2028

Table 27 - Forecast Retail Sales of Eggs: % Value Growth 2023-2028

Fish and Seafood in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Steady increment in fish and seafood consumption

Crustaceans experience price decreases

PROSPECTS AND OPPORTUNITIES

Outlook for seafood imports from Japan threatened by government response to Fukushima nuclear wastewater

Freshippo develops new technology to eliminate earthy taste in freshwater fish

Summary 3 - Major Processors of Fish and Seafood 2023

CATEGORY DATA

Table 28 - Total Sales of Fish and Seafood by Category: Total Volume 2018-2023

Table 29 - Total Sales of Fish and Seafood by Category: % Total Volume Growth 2018-2023

Table 30 - Retail Sales of Fish and Seafood by Category: Volume 2018-2023

Table 31 - Retail Sales of Fish and Seafood by Category: % Volume Growth 2018-2023

Table 32 - Retail Sales of Fish and Seafood by Category: Value 2018-2023

Table 33 - Retail Sales of Fish and Seafood by Category: % Value Growth 2018-2023

Table 34 - Retail Sales of Fish and Seafood by Packaged vs Unpackaged: % Volume 2018-2023

Table 35 - Forecast Total Sales of Fish and Seafood by Category: Total Volume 2023-2028

Table 36 - Forecast Total Sales of Fish and Seafood by Category: % Total Volume Growth 2023-2028

Table 37 - Forecast Retail Sales of Fish and Seafood by Category: Volume 2023-2028

Table 38 - Forecast Retail Sales of Fish and Seafood by Category: % Volume Growth 2023-2028

Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Value 2023-2028

Table 40 - Forecast Retail Sales of Fish and Seafood by Category: % Value Growth 2023-2028

Fruits in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price continues to drive dynamic value growth of fruits

Shenzhen Pagoda Industrial (Group) Corporation Limited

PROSPECTS AND OPPORTUNITIES

Fruits increasingly leans towards premiumisation

Consumption of blueberries set to continue growing, supported by domestic production

Summary 4 - Major Processors of Fruits 2023

CATEGORY DATA

Table 41 - Total Sales of Fruits by Category: Total Volume 2018-2023

Table 42 - Total Sales of Fruits by Category: % Total Volume Growth 2018-2023

Table 43 - Retail Sales of Fruits by Category: Volume 2018-2023

Table 44 - Retail Sales of Fruits by Category: % Volume Growth 2018-2023

Table 45 - Retail Sales of Fruits by Category: Value 2018-2023

Table 46 - Retail Sales of Fruits by Category: % Value Growth 2018-2023

Table 47 - Retail Sales of Fruits by Packaged vs Unpackaged: % Volume 2018-2023

Table 48 - Forecast Total Sales of Fruits by Category: Total Volume 2023-2028

Table 49 - Forecast Total Sales of Fruits by Category: % Total Volume Growth 2023-2028

Table 50 - Forecast Retail Sales of Fruits by Category: Volume 2023-2028

Table 51 - Forecast Retail Sales of Fruits by Category: % Volume Growth 2023-2028

Table 52 - Forecast Retail Sales of Fruits by Category: Value 2023-2028

Table 53 - Forecast Retail Sales of Fruits by Category: % Value Growth 2023-2028

Meat in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Declining retail volumes of meat as consumers switch to foodservice

Pork's average unit price continues declining in 2023, ensuring affordability

PROSPECTS AND OPPORTUNITIES

Convenience may drive further shift towards processed meat and quick recipe kits, leading to lower consumption of fresh meat

Increasing presence of premium meat options

Summary 5 - Major Processors of Meat 2023

CATEGORY DATA

Table 54 - Total Sales of Meat by Category: Total Volume 2018-2023

Table 55 - Total Sales of Meat by Category: % Total Volume Growth 2018-2023

Table 56 - Retail Sales of Meat by Category: Volume 2018-2023

Table 57 - Retail Sales of Meat by Category: % Volume Growth 2018-2023

Table 58 - Retail Sales of Meat by Category: Value 2018-2023

Table 59 - Retail Sales of Meat by Category: % Value Growth 2018-2023

Table 60 - Retail Sales of Meat by Packaged vs Unpackaged: % Volume 2018-2023

Table 61 - Forecast Sales of Meat by Category: Total Volume 2023-2028

Table 62 - Forecast Sales of Meat by Category: % Total Volume Growth 2023-2028

Table 63 - Forecast Retail Sales of Meat by Category: Volume 2023-2028

Table 64 - Forecast Retail Sales of Meat by Category: % Volume Growth 2023-2028

Table 65 - Forecast Retail Sales of Meat by Category: Value 2023-2028

Table 66 - Forecast Retail Sales of Meat by Category: % Value Growth 2023-2028

Nuts in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Stable performance for nuts in 2023

Fresh coconut water becomes sensation in tea shops, driving the rapid growth of foodservice volumes

PROSPECTS AND OPPORTUNITIES

E-commerce to drive growth of fresh walnuts

Homemade plant-based milk could offer potential for various nuts

Summary 6 - Major Processors of Nuts 2023

CATEGORY DATA

Table 67 - Total Sales of Nuts by Category: Total Volume 2018-2023

Table 68 - Total Sales of Nuts by Category: % Total Volume Growth 2018-2023

Table 69 - Retail Sales of Nuts by Category: Volume 2018-2023

Table 70 - Retail Sales of Nuts by Category: % Volume Growth 2018-2023

Table 71 - Retail Sales of Nuts by Category: Value 2018-2023

Table 72 - Retail Sales of Nuts by Category: % Value Growth 2018-2023

Table 73 - Retail Sales of Nuts by Packaged vs Unpackaged: % Volume 2018-2023

Table 74 - Forecast Total Sales of Nuts by Category: Total Volume 2023-2028

Table 75 - Forecast Total Sales of Nuts by Category: % Total Volume Growth 2023-2028

Table 76 - Forecast Retail Sales of Nuts by Category: Volume 2023-2028

Table 77 - Forecast Retail Sales of Nuts by Category: % Volume Growth 2023-2028

Table 78 - Forecast Retail Sales of Nuts by Category: Value 2023-2028

Table 79 - Forecast Retail Sales of Nuts by Category: % Value Growth 2023-2028

Pulses in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Total volume sales of pulses recover from effects of 2022's foodservice disruptions

Mung beans become innovative ingredient in tea and coffee foodservice NPD

PROSPECTS AND OPPORTUNITIES

Chickpeas offer potential due to rising awareness of healthy attributes

Proportion of packaged and organic pulses via retail is set to increase

Summary 7 - Major Processors of Pulses 2023

CATEGORY DATA

Table 80 - Total Sales of Pulses by Category: Total Volume 2018-2023

Table 81 - Total Sales of Pulses by Category: % Total Volume Growth 2018-2023

Table 82 - Retail Sales of Pulses by Category: Volume 2018-2023

Table 83 - Retail Sales of Pulses by Category: % Volume Growth 2018-2023

Table 84 - Retail Sales of Pulses by Category: Value 2018-2023

Table 85 - Retail Sales of Pulses by Category: % Value Growth 2018-2023

Table 86 - Retail Sales of Pulses by Packaged vs Unpackaged: % Volume 2018-2023

Table 87 - Forecast Total Sales of Pulses by Category: Total Volume 2023-2028

Table 88 - Forecast Total Sales of Pulses by Category: % Total Volume Growth 2023-2028

Table 89 - Forecast Retail Sales of Pulses by Category: Volume 2023-2028

Table 90 - Forecast Retail Sales of Pulses by Category: % Volume Growth 2023-2028

Table 91 - Forecast Retail Sales of Pulses by Category: Value 2023-2028

Table 92 - Forecast Retail Sales of Pulses by Category: % Value Growth 2023-2028

Starchy Roots in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Post-pandemic mobility drives demand for starchy roots in 2023

Variety of sweet potatoes becomes more diverse and with a premium positioning

PROSPECTS AND OPPORTUNITIES

"Waterfall" potato dishes are trending on Chinese social media platforms

Food as medicine may benefit other starchy roots

Summary 8 - Major Processors of Starchy Roots 2023

CATEGORY DATA

Table 93 - Total Sales of Starchy Roots by Category: Total Volume 2018-2023

Table 94 - Total Sales of Starchy Roots by Category: % Total Volume Growth 2018-2023

Table 95 - Retail Sales of Starchy Roots by Category: Volume 2018-2023

Table 96 - Retail Sales of Starchy Roots by Category: % Volume Growth 2018-2023

Table 97 - Retail Sales of Starchy Roots by Category: Value 2018-2023

- Table 98 - Retail Sales of Starchy Roots by Category: % Value Growth 2018-2023
- Table 99 - Retail Sales of Starchy Roots by Packaged vs Unpackaged: % Volume 2018-2023
- Table 100 - Forecast Total Sales of Starchy Roots by Category: Total Volume 2023-2028
- Table 101 - Forecast Total Sales of Starchy Roots by Category: % Total Volume Growth 2023-2028
- Table 102 - Forecast Retail Sales of Starchy Roots by Category: Volume 2023-2028
- Table 103 - Forecast Retail Sales of Starchy Roots by Category: % Volume Growth 2023-2028
- Table 104 - Forecast Retail Sales of Starchy Roots by Category: Value 2023-2028
- Table 105 - Forecast Retail Sales of Starchy Roots by Category: % Value Growth 2023-2028

Sugar and Sweeteners in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Resumption of normal lifestyles influences category dynamics in 2023
- Brown sugar becomes increasingly important in retail

PROSPECTS AND OPPORTUNITIES

- Total volume sales set to remain flat over the forecast period
- Monk fruit sweetener offers strong potential due to its healthy attributes
- Summary 9 - Major Processors of Sugar and Sweeteners 2023

CATEGORY DATA

- Table 106 - Total Sales of Sugar and Sweeteners: Total Volume 2018-2023
- Table 107 - Total Sales of Sugar and Sweeteners: % Total Volume Growth 2018-2023
- Table 108 - Retail Sales of Sugar and Sweeteners: Volume 2018-2023
- Table 109 - Retail Sales of Sugar and Sweeteners: % Volume Growth 2018-2023
- Table 110 - Retail Sales of Sugar and Sweeteners: Value 2018-2023
- Table 111 - Retail Sales of Sugar and Sweeteners: % Value Growth 2018-2023
- Table 112 - Retail Sales of Sugar and Sweeteners by Packaged vs Unpackaged: % Volume 2018-2023
- Table 113 - Forecast Total Sales of Sugar and Sweeteners: Total Volume 2023-2028
- Table 114 - Forecast Total Sales of Sugar and Sweeteners: % Total Volume Growth 2023-2028
- Table 115 - Forecast Retail Sales of Sugar and Sweeteners: Volume 2023-2028
- Table 116 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2023-2028
- Table 117 - Forecast Retail Sales of Sugar and Sweeteners: Value 2023-2028
- Table 118 - Forecast Retail Sales of Sugar and Sweeteners: % Value Growth 2023-2028

Vegetables in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Vegetables recover from pandemic impact in 2023
- Freshippo transforms organic vegetable accessibility through supply chain strategy

PROSPECTS AND OPPORTUNITIES

- Health awareness could drive growth of corn, with processed shelf-stable corn as a strong competitor
- Share of packaged vegetables is set to continue rising
- Summary 10 - Major Processors of Vegetables 2023

CATEGORY DATA

- Table 119 - Total Sales of Vegetables by Category: Total Volume 2018-2023
- Table 120 - Total Sales of Vegetables by Category: % Total Volume Growth 2018-2023
- Table 121 - Retail Sales of Vegetables by Category: Volume 2018-2023

Table 122 - Retail Sales of Vegetables by Category: % Volume Growth 2018-2023

Table 123 - Retail Sales of Vegetables by Category: Value 2018-2023

Table 124 - Retail Sales of Vegetables by Category: % Value Growth 2018-2023

Table 125 - Retail Sales of Vegetables by Packaged vs Unpackaged: % Volume 2018-2023

Table 126 - Forecast Total Sales of Vegetables by Category: Total Volume 2023-2028

Table 127 - Forecast Total Sales of Vegetables by Category: % Total Volume Growth 2023-2028

Table 128 - Forecast Retail Sales of Vegetables by Category: Volume 2023-2028

Table 129 - Forecast Retail Sales of Vegetables by Category: % Volume Growth 2023-2028

Table 130 - Forecast Retail Sales of Vegetables by Category: Value 2023-2028

Table 131 - Forecast Retail Sales of Vegetables by Category: % Value Growth 2023-2028

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/fresh-food-in-china/report.