

### Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Despite a big population of people diagnosed with overweight issues, the weight loss market in China only achieved moderate growth in 2015-16. The health supplement market grew faster by comparison, but still remains highly fragmented with fierce competition. There is no reason for brands to think this is an easy market, just because people want to pay anything for health." Ruyi Xu, Head of Research China

### This report looks at the following areas:

- From weight loss to weight management
- Guiding choices is important
- Beauty supplements will become a key growth area

### What you need to know

The weight loss market came back to moderate growth in 2014 and 2015, but faces challenges ahead as consumers prefer more natural ways to lose weight such as exercising and diet control. Brands need to adapt to their changing attitudes towards an ideal body shape by fitting into consumer's lifestyles rather than changing them.

The health supplement market will be led by stronger growth in minerals and dietary supplements as consumers are looking for more diversified products to battle against different health issues. There is room for product innovation to make supplements look natural, tasty and fun to eat.

### BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

арас +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Table of Contents

Overview

### What you need to know Covered in this report Weight loss products Health supplements Definitions **Executive Summary** The market Moderate growth in weight loss Figure 1: Best- and worst-case forecast of total certified weight loss value sales, China 2011-21 Minerals and dietary supplements lead growth in health supplements

Figure 2: Best- and worst-case forecast of total health supplement value sales, China 2011-21

### Key players

The consumer

### Only half consumers think they are in shape

Figure 3: Perception of body shape, June 2016

### Changing attitudes towards weight

Figure 4: Attitudes towards body shape and weight management, Jun 2016

### Meal replacements and weight loss products are in low priority

Figure 5: Ways to manage body shape in the past 12 months, Jun 2016

### Minerals and dietary supplements over vitamins

Figure 6: Type of health supplements taken in the past 12 months, March 2015

### Gap in health conditions and perceptions of supplements

Figure 7: Perceived health conditions that health supplements can help (June 2016) vs sub-health conditions consumers have (March 2015)

### Making health supplements snack-like and more fun to eat

Figure 8: Best snack format for health supplements, June 2016

### What we think

### Issues & Insights

### From weight loss to weight management

The facts

#### The implications

Figure 9: Example of dietary supplement for muscle health, US 2015

Figure 10: Examples of weight management dietary supplements, Italy 2015

#### Guiding choices is important

The facts

The implications

# BUY THIS REPORT NOW

APAC +61 (0) 2 8284 8100



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Beauty supplements will become a key growth area

The facts

### The implications

Figure 11: Examples of beauty supplements with specialised skin benefits, Japan and UK 2016

Figure 12: Examples of beauty supplements good for skin, hair and nail, UK 2015-16

Figure 13: Examples of beauty supplements with food imagery, UK and USA, 2016

### The Market – What You Need to Know

### Weight loss regained growth but face challenges ahead

### Minerals and dietary supplements lead growth

### Market Size and Forecast

### Weight loss recovered but faces challenges ahead

Figure 14: Value sales of total certified weight loss products, China 2011-16

Figure 15: Best- and worst-case forecast of total certified weight loss value sales, China 2011-21

### Health supplements forecast to grow in double digits

Figure 16: Value sales of total health supplements, China 2011-16

Figure 17: Best- and worst-case forecast of total health supplement value sales, China 2011-21

### Market Factors

### Aging population

Imbalanced dietary habits causing overweight

Chronic diseases on rise with a changing structure

Proliferation of online shopping and the cross-border online shopping

Regulatory changes

### Deregulating the health food product registration process

Health food added in National Medicare Subsidiary Scheme

### Market Segmentation

### Weight loss

Figure 18: Value sales of certified weight loss, by segment, China 2011-16

### Health supplements

Figure 19: Value sales of health supplements, by segment, China 2011-16

Figure 20: Top 20 growing nutrients in new health supplement launches, China 2014-16 (until August)

### Key Players – What You Need to Know

Besunyen eyeing on Orlistat weight loss drugs

Health supplement market remains highly fragmented

MLM losing out to online retailing

Major Australian brands reporting record sales growth

Chinese capital active in business acquisitions

Beauty supplements on the rise

# BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMALL: reports@mintel.com



### Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Weight Loss Market Figure 21: Besunyen revenue by product, 2015-16 Figure 22: List of key players in weight loss health food and meal replacement, China Health Supplement Market Figure 23: Leading companies in health supplement market, by value share, China 2014-15 Pfizer Amway Herbalife By-Health NBTY Blackmores and Swisse **Competitive Strategies** Chinese capital active in foreign business acquisitions Precision marketing Elevating the brand experience Who's Innovating? Trends in product claims Figure 24: Examples of Japanese manufacturer launching health supplement drinks targeting women, China 2016 Figure 25: Example of powder drink with skin and anti-aging benefits, China 2016 Figure 26: Top 20 claims in new health supplement launches, China 2014-16 (until August) Health supplements in a snack-like format Figure 27: New health supplement launches by product format, China vs Global, 2015-16 (until August) Figure 28: E-jiao cake, China 2016 Figure 29: Health supplements in chocolate format, USA 2015 Figure 30: Health supplements in chewybites and snack format, Canada and France, 2014-15 Figure 31: Health supplements in drinks format, Germany and USA, 2015 Figure 32: Health supplements in seeds and gummies format, UK, Mexico, USA, 2015-16 The Consumer – What You Need to Know More conscious about body shape than weight Meal replacements and weight loss products are not top solutions Minerals and dietary supplements on the rise, vitamins losing appeal Gap in health conditions and perceptions of supplements Wide interest in snack-like health supplements Self-evaluation of Body Shape Only half are satisfied

Figure 33: Perception of body shape, Jun 2016

Weight management opportunities in the young male market

# BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMALL: reports@mintel.com



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Ways of Weight Management

### No change in the top three options

Figure 34: Ways to manage body shape in the past 12 months, June 2016

### Consumers prefer safer, less costly, more convenient options

### Meal replacements and weight loss medicine on back burner

Doing nothing by those who consider them too slim

### Attitudes towards Weight Management

#### A trend to focus more on shape than weight

Figure 35: Attitudes towards body shape and weight management, June 2016

#### Who are these people?

Figure 36: Type of health supplements taken by consumer segmentation, Jun 2016

### On-pack descriptions of nutrition and energy become more important

Figure 37: Attitudes towards nutrition and energy labelling, Jun 2016

Figure 38: Attention to nutrition and energy information, by city, June 2016

### More opportunities for food and drink manufacturers

### Usage of Health Supplements

### Minerals and dietary supplements on the rise

Figure 39: Type of health supplements taken in the past 12 months, March 2015

### Driving usage frequency among mid and light users

#### Heavy user profile

Figure 40: Percentage of heavy health supplement users, by age and gender, June 2016

### City differences

Figure 41: Percentage of heavy health supplement users, by city tier, June 2016

Figure 42: Percentage of heavy health supplement users, by tier one city, June 2016

### Perceived Functions of Health Supplements

### Gap between consumer health conditions and perceived effectiveness of supplements

Figure 43: Perceived health conditions that health supplements can help (June 2016) vs sub-health conditions consumers have (March 2015)

### Minerals stand out

Figure 44: Percentage of heavy health supplement users by perceived health conditions that health supplements can help, June 2016

### Not just for old consumers

Figure 45: Selected perceived health conditions that health supplements can help, by age, June 2016

### Opportunities in Snack-like Health Supplements

### Wide interest in health supplements in a snack format

Figure 46: Best snack format for health supplements, June 2016

### Meet the Mintropolitans

### More MinTs think they are slightly fat and are figure-cautious

Figure 47: Perception of body shape, June 2016

# BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMALL: reports@mintel.com



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure	e 48: Ways to manage body shape in the past 12 months, by consumer classification, June 2016
More fait	h in health supplements
Figure	e 49: Percentage of heavy health supplement users, by consumer classification, June 2016
Figure	e 50: Perceived health conditions that health supplements can help, by consumer classification, June 201
Appendix	- Methodology and Abbreviations
Methodo	ogy
Fan char	t forecast
Abbrevia	tions
Appendix	– Market Size, Segmentation and Forecast
Figure	e 51: Total sales value of certified weight loss and health supplements, China 2011-21
Figure	e 52: Sales value of certified weight loss and health supplements, by segment, China 2011-21
Figure	e 53: Best- and worst-case forecast of vitamin value sales, China 2011-21
Figure	e 54: Best- and worst-case forecast of mineral value sales, China 2011-21
Figure	55: Best- and worst-case forecast of dietary supplement value sales, China 2011-21

# BUY THIS REPORT NOW

VISII: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMAIL: reports@mintel.com