

Health Supplements - China - November 2019

Report Price: £3695 | \$4995 | €4400

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

This report looks at the following areas:

- Key audience is high income consumers
- Expand the popularity of beauty supplements among males
- Tap into customisation for young people

The health supplements market has experienced fast growth over the past five years due to the rising importance of health among Chinese consumers. However, half of consumers still have concerns about the effectiveness of health supplements. Brands should provide communication channels to consumers to ensure the effectiveness of their products and build a closer relationship to assuage their worries.



"Continuously rising awareness of disease prevention and the expanding ageing population will ensure the future growth of the health supplements market, but consumers' concerns about reliability and effectiveness of health supplements are the biggest obstacles to brands' further growth."

– Roolee Lu, Research Analyst

Buy this report now

Visit store.mintel.com

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

Table of Contents

OVERVIEW

- What you need to know
- Covered in this report
- Excluded

EXECUTIVE SUMMARY

- The market
- Further growth expected due to national health strategy and market standardization

Figure 1: Best-and worst-case forecast of total value sales of health supplements market, China, 2014-24

- Dietary supplements lead growth of health supplements category
- Companies and brands
- Increased consolidation and expanded portfolios
- Full channel coverage in both online and offline
- The consumer
- Strong demand for probiotics from families with babies and children aged 4-12

Figure 3: Usage of health supplements, by product type, China, July 2019

- Communication needed to reassure consumers
- Interest in health supplements grows as income increases and age decreases

Figure 5: Functions bought and interested in, China, July 2019

- Reference to reliable and professional information

Figure 6: Information channel, China, July 2019

- Product outweighs packaging in gifting

Figure 7: Features for gifting, China, July 2019

- More effort needed to build connection between ingredients and functions

Figure 8: Knowledge about selected ingredients, China, July 2019

- What we think

ISSUES AND INSIGHTS

- Key audience is high income consumers
- The facts
- The implications

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

Figure 9: By-Health's raw materials map

Figure 10: myGNC PRO Access

- **Expand the popularity of beauty supplements among males**

- **The facts**

- **The implications**

Figure 11: Example of beauty supplements targeting male consumers, UK

Figure 12: Example of collagen drink designed for men, Myanmar

- **Tap into customisation for young people**

- **The facts**

- **The implications**

Figure 13: Example of health supplements in gummy and liquid spray format, US and Italy

Figure 14: Qi Miao De Shi Guang Variety Show

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

THE MARKET – WHAT YOU NEED TO KNOW

- **Continuous growth due to expanded demand**
- **Prevention instead of treatment**
- **Dietary supplements' segment share keeps increasing**

MARKET SIZE AND FORECAST

- **Stable growth resumes after short-term downturn**

Figure 15: Best-and worst-case forecast of total value sales of health supplements market, China, 2014-24

MARKET DRIVERS

- **Healthy China 2030 drives change from treatment to prevention**
- **Acceleration of ageing society brings greater demand**
- **Expenditure on healthcare grows fast**
- **Standardized regulation will win back trust**

MARKET SEGMENTATION

- **Chance for vitamins in pregnancy nutrition and beauty functions**

Figure 16: Best-and worst-case forecast of vitamins segment, by value, China, 2014-24

- **Minerals benefit from ageing population**

Figure 17: Best-and worst-case forecast of minerals segment, by value, China, 2014-24

- **Popular products fuel growth of dietary supplements**

Figure 18: Best-and worst-case forecast of dietary supplements segment, by value, China, 2014-24

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

KEY PLAYERS – WHAT YOU NEED TO KNOW

- **Intense competition accelerates market concentration**
- **Omni-channel coverage**
- **Focus on all-natural claims and alternative formats**

MARKET SHARE

Figure 19: Market share of leading companies in health supplements market, China, 2017-18

- **Acceleration of industry consolidation**
- **Expanded product portfolios**
- **Growing importance of online channels**

COMPETITIVE STRATEGIES

- **The whole is greater than the sum of its parts**
- **From online to offline**

Figure 20: Swisse's first global physical flagship store in Shanghai

- **Communicate with young consumers in their way**

Figure 21: Official account of Swisse on Xiaohongshu

WHO'S INNOVATING?

- **All-natural is worthy of attention**

Figure 22: new launches in health supplements with all-natural claim, Global, Oct 2017- Sep 2019

Figure 23: New health supplement launches with all-natural product claim, US, Poland and Spain, 2018-2019

- **Liquid formats are popular in beauty supplements**

Figure 24: New beauty supplement launches, by format type, global, Oct 2017-Sep 2019

Figure 25: New beauty supplement launches with liquid format type, Germany and US, 2019

- **Cross-over to create new consumption occasions**

Figure 26: Ejiao series of drinks from the cross-over between DEEJ and Pacific Coffee

THE CONSUMER – WHAT YOU NEED TO KNOW

- **Biggest concern is about functions**
- **Males and females reach a consensus on beauty**
- **Reliable information is most sought-after**
- **Packaging is not a primary concern in gifting**

USAGE OF HEALTH SUPPLEMENTS

- **Continued popularity of probiotics**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Figure 27: Usage of health supplements, by product type, China, July 2019

Figure 28: Usage of probiotics among children, by age, China, July 2019

- **Deep penetration of grape seed products**

Figure 29: Usage of grape seeds, by gender and age, China, July 2019

- **Whey products need to expand consumption occasions**

Figure 30: Usage of whey products, by age, China, July 2019

Figure 31: Usage of whey products, China, July 2019

- **Dominance of TCM among older people**

Figure 32: Usage of TCM supplements, by age, China, July 2019

CONCERNS ABOUT CONSUMPTION

- **Uncertainty can be potential**

Figure 33: Concerns about consumption, China, July 2019

Figure 34: By-Health's nutrition discovery centre in Zhuhai, China

- **Young consumers are not regular takers**

Figure 35: Concerns about consumption – I don't usually take health supplements on a schedule, by age, China, July 2019

FUNCTIONS BOUGHT AND INTERESTED IN

- **Being young and beautiful always in for females**

Figure 36: Functions bought and interested in – have bought before, by gender, China, July 2019

Figure 37: Functions bought and interested in – have bought before, by age, China, July 2019

- **Market potential for males in beauty supplements**

Figure 38: Functions bought and interested in – haven't bought this but are interested in buying, by gender, China, July 2019

- **Consumers' interest is driven by household income**

Figure 39: Functions bought and interested in – haven't bought this but are not interested in buying, by household income, China, July 2019

- **Consumers' interest increases as age decreases**

Figure 40: Functions bought and interested in – haven't bought this but are not interested in buying, by age, China, July 2019

INFORMATION CHANNEL

- **Reliable information matters**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Figure 41: Information channel, China, July 2019

- **Consumers aged 25-39 are sophisticated in product selection**

Figure 42: Information channel, by age, China, July 2019

- **Celebrity effect works for younger generations**

Figure 43: Information channel – recommendations from celebrities, by generation, China, July 2019

Figure 44: By-health and its spokesman Cai Xunkun

- **TV still has strong influence among seniors**

Figure 45: Information channel – TV Advertisements, by age, China, July 2019

FEATURES FOR GIFTING

- **Right product for the right recipient**

Figure 46: Features for gifting, China, July 2019

Figure 47: Features for gifting – designed for specific groups, by age, China, July 2019

- **Premiumisation for consumers aged 30-39**

Figure 48: Features for gifting – using ingredients from authentic origin places, by age, China, July 2019

- **Lesser importance of exquisite packaging**

Figure 49: Features for gifting, by region, China, July 2019

KNOWLEDGE ABOUT SELECTED INGREDIENTS

- **Functions come first, then ingredients**

Figure 50: Knowledge about selected ingredients, China, July 2019

- **Male consumers are less conscious about beauty functions**

Figure 51: Knowledge about selected ingredients, China, July 2019

Figure 52: Knowledge about selected ingredients, by gender, China, July 2019

- **High consciousness of melatonin among young consumers**

Figure 53: Knowledge about selected ingredients, China, July 2019

- **Degree of familiarity varies by age**

Figure 54: Knowledge about selected ingredients – I am not familiar with this ingredient, by age, China, July 2019

MEET THE MINTROPOLITANS

- **Greater consumption and interest in health supplements**

Figure 55: Functions bought and interested in – have bought before, by consumer classification, China, July 2019

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

Figure 56: Functions bought and interested in – haven't bought this and are not interested in buying, by consumer classification, China, July 2019

- **Better knowledge of trendy ingredients**

Figure 57: Knowledge about selected ingredients – I am not familiar with this ingredient, by consumer classification, China, July 2019

APPENDIX – MARKET SIZE AND FORECAST

Figure 58: Total market value of health supplements, China, 2014–24

APPENDIX – MARKET SEGMENTATION

Figure 59: Total market value of vitamins, 2014–24

Figure 60: Total market value of minerals, 2014–24

Figure 61: Total market value of dietary supplements, 2014–24

APPENDIX – METHODOLOGY AND ABBREVIATIONS

- **Methodology**
- **Fan chart forecast**
- **Abbreviations**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.