

Gut Health Management – China – 2021

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:

- Market factors influencing the gut health industry
- Marketing strategies to watch
- New product innovations to watch
- Incidence and the underlying causes of gut issues
- Current usage and future interests in gut health management products
- Attitudes towards probiotics

Consumers aged 30–39 (26% vs 22% among total) are particularly aware of a sensitive digestive system as a sign of ageing. Furthermore, this group (52% vs 48% among total) are more likely to have taken gut health supplements and functional foods to manage gut health. This suggests that gut health is a key opportunity area for food, drink and supplement manufacturers to tap into the healthy ageing trend by promoting the long-term health benefits.

Gut issue sufferers cite a variety lifestyle factors as the root causes of their issues. Overall, COVID-19 and its subsequent concern in poor immunity is not the single most crucial cause of having gut issues. Unbalanced diet, stress/sleep problems and lack of exercise also have an impact.

Mass market consumers have a rising awareness of the holistic health benefits of probiotics. While this may sound tempting for food, drink and supplement companies to flood into the probiotics market, given that consumers do not have a clear preference on brands, product homogenisation could be a major barrier for brands to address if they are to break through the competition in the probiotics market.

The good news is that the value of probiotics – especially the use of multiple strains – is on consumers' radar. This creates new opportunities for brands to emphasise strains cleverly on marketing messages to differentiate (eg calls different strains by using a 'nickname' alongside educating consumers about their unique health benefits). Brands can also dial into the healthy diet trend by



"Gut health will evolve to be more than simply preventing physical health issues from happening in consumers' current life stage. For mass market consumers, they will have a long-term goal to achieve healthy ageing. For gut issue sufferers, this will include leading a better lifestyle but also healing important parts of the body-signalling process."

– Catherine Liu, Senior 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

Gut Health Management - China - 2021

Report Price: £3695 | \$4995 | €4400

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

introducing gut-healing diets (eg avoid problematic ingredients such as additives), helping consumers to heal the gut and the subsequent gut-signalling pathways to other parts of the body.



What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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

Table of Contents

OVERVIEW

- Key issues covered in this Report
- Products covered in this Report
- Products/services excluded

EXECUTIVE SUMMARY

- The market
- Economic hardship has limited impact on gut health market players
- Healthy ageing drives demand for gut health management solutions
- Company strategies and innovations
- Marketing highlight
- Product innovation highlight
- The consumer
- Rising awareness of gut-skin link

Figure 1: Percentage incidence of gut health issues, 2020, 2021

- Root cause of gut issues lies in various lifestyle factors
- Supplements, functional foods and sugar reduction is about to take off

Figure 3: Methods that improved gut health, China, 2021

- Topical, natural and fermented products are emerging

Figure 4: Gut health product usage, China, 2021

- Rising awareness of probiotics' holistic functions beyond mere immunity

Figure 5: Awareness of probiotics functions, China, 2021

- Probiotics' product flavours and multiple strains win over brand

Figure 6: Select attitudes towards probiotics, China, 2021

- What we think

ISSUES AND INSIGHTS

- Gut health fits into a solution for healthy ageing
- The facts
- The implications

Figure 7: Examples of gut health products integrated with age management benefits, China, 2020-21

Figure 8: Nestinity by Nestlé, China, 2021

- Differentiating probiotics via clever education on multiple strains and their functions

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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 facts**
- **The implications**

Figure 9: Bear Classmate's probiotic dietary supplements, China, 2021

Figure 10: Examples of products featuring specific emotional wellness functions, China and Japan, 2019-20

- **Tap into the interest in gut-healing diet**
- **The facts**
- **The implications**

Figure 11: Examples of brands using gut healing dietary concept, China and US, 2020-21

Figure 12: Examples of high fibre products for people with acute gut issues, China and Australia, 2020-21

MARKET FACTORS

- **Economic hardship has limited impact on market players**
Figure 13: Financial confidence: proportion of those who are 'very/somewhat/a little bit' confident, 2019-21
- **Ageing drives gut health management solutions**
Figure 14: Population structure, by age, China, 1982-2020
- **Government support drives industry evolution - holistic management becomes important**
- **eCommerce accelerates consumer reach for gut health supplements**

MARKETING ACTIVITIES

- **Lifestyle marketing emerges in food and drink category**
Figure 15: Bright Dairy's '7-day Improvement Plan' yogurt drink, China, 2021
Figure 16: Helga's '14-day gut health challenge', Australia, 2021
- **'Nickname' marketing approach emerges in dietary supplement category**
Figure 17: Wonderlab's probiotic products, China, 2020-21
- **Global and regional OTC brands are exploring further avenues to connection**
Figure 18: Numan's acid reflux treatment plan, UK, 2021

NEW PRODUCT TRENDS

- **Category highlight**
Figure 19: Share of food*, drink, supplements, beauty and personal care launches with functional claims related to gut health**, China, 2018-21
- **"Microbiome" concept grows in skin care**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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 20: Top five food*, drink, supplement and oral hygiene category launches with the microbiome-related claims**, China, 2018-21 (moving annual)

Figure 21: Examples of probiotic-formulated BPC products that highlight the efficacy of probiotics, global, 2020-21

- **Health claims highlight**
- **Looking beyond digestion to cover healthy ageing benefits**

Figure 22: Top 10 food*, drink and supplement launches with gut health benefits**, China, 2018-21 (moving annual)

Figure 23: Examples of sports nutrition products featuring gut health benefits, China and US, 2019-20

Figure 24: Examples of yogurt added with anti-ageing and eye health-improving benefits, China, 2021

- **Make fibre claim as interesting as sugar and calorie reduction**

Figure 25: Select "plus" and "minus" claims in food*, drink and supplement launches with high/added fibre claim, China, 2018-21 (moving annual)

Figure 26: Examples of products that highlight fibre's blood sugar suppressant and low calories attributes, China, 2021

- **Gut health claims become popular in free-from products**

Figure 27: Selected functional claims in food*, drink and supplement launches with** and without free-form claims, China, 2018-21

Figure 28: Examples of free-from claimed products that highlight the benefits of gut healing, China and overseas, 2020-21

- **Ingredient highlight**
- **Use fermented ingredients or fermentation process to fast track into gut health market**

Figure 29: Top five functional claims in food* and drink launches which mentions "ferment" on packaging, China, 2018-21

Figure 30: Examples of drinks that use fermentation, China and Overseas, 2020-21

Figure 31: Examples of products using fermentation technique, Overseas, 2020-21

- **Opportunity to reinforce gut-brain axis through stress-relief and sleep-improving probiotics**

Figure 32: Selected functional claims in food*, drink and supplement launches with a probiotic claim, China, APAC, 2018-21 (moving annual)

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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 33: Examples of products that highlight probiotics' sleep and stress relief benefits, Japan, 2020

GUT HEALTH ISSUES

- **Rising incidence of skin problems besides popular lower digestive tract issues**

Figure 34: Rankings of gut health issues, China, 2020, 2021

Figure 35: Percentage incidence of gut health issues, 2020, 2021

- **Women have well-rounded awareness of gut health issues**

Figure 36: Select gut health issues, by gender, China, 2021

CAUSES OF GUT HEALTH ISSUES

- **Root cause of gut issues lies in various lifestyle factors**

Figure 37: Causes of gut health issues, China, 2021

- **Young people are savvier about lifestyle causes**

Figure 38: Select causes of gut health issues, by age, China, 2021

METHODS THAT IMPROVED GUT HEALTH

- **Supplements, functional foods and sugar reduction are about to take off**

Figure 39: Methods that improved gut health, China, 2021

- **Fermented foods attract parents with older children**

Figure 40: Future interest in fermented food*, by age of children under 18 in household, China, 2021

- **High fibre diet can attract heartburn and gastric ulcer sufferers**

Figure 41: Select methods that improve gut health issues – have used and effective, by select gut health issues, China, 2021

Figure 42: Future interest in eating high fibre foods*, by select gut health issues, China, 2021

GUT HEALTH PRODUCT USAGE

- **Topical, natural and fermented products are emerging**

Figure 43: Gut health product usage, China, 2021

- **Renewed perception of fruit vinegar**

- **A gut health supplement suitable for everyday usage**

Figure 44: Select gut health product usage – have not tried but are interested in trying, by select attitude towards gut health products, China, 2021

- **Potential to add on mood-digestive health benefit**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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 45: Select gut health product usage – have not tried but are interested in trying, by select attitude towards emotional wellbeing, China, 2021

- **Patented tech will attract consumer usage of probiotic supplements**

Figure 46: Select gut health product usage – have not tried but are interested in trying, by select attitude towards gut health products, China, 2021

Figure 47: Select gut health product usage – have not tried but are interested in trying, by select gut health issues, China, 2021

ATTITUDES TOWARDS PROBIOTICS

- **Rising awareness of holistic functions**

Figure 48: Awareness of probiotics functions, China, 2021

- **Various flavours and multiple strains win over brand**

Figure 49: Select attitudes towards probiotics, China, 2021

Figure 50: Select attitude towards probiotics, by select awareness of probiotics functions, China, 2021

- **Food and drink brands to attract sleep-improving seekers**

Figure 51: Select attitude towards probiotics, by select gut health product usage – have not tried but are interested in trying, China, 2021

- **Supplement brands to attract future users through highlighting gut-brain axis**

Figure 52: Attitude towards gut health products, by select gut health product usage – have not tried but are interested in trying, China, 2021

Figure 53: Select attitude towards probiotics, by select awareness of probiotics functions, China, 2021

APPENDIX – METHODOLOGY AND ABBREVIATIONS

- **Methodology**
- **Abbreviations**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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)**.