

Food of the future

How health is spurring ingredient innovation in China



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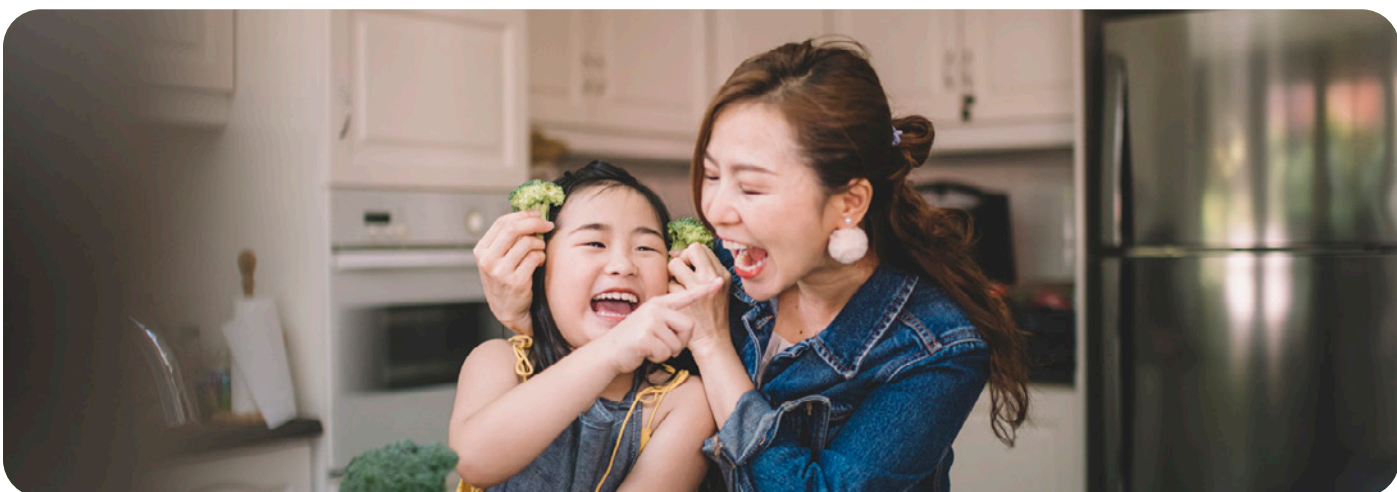
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Introduction

China's food culture reflects the diversity of its vast territory and abundant resources, with regional cuisines based on the availability of raw materials, their weather, and various ethnicities¹. Home to 1.4 billion people², the country's packaged food and drink market is growing rapidly with increased urbanisation, economic growth, and changing lifestyles, creating opportunities for both local and foreign brands³.

By 2022, nearly two-thirds (65%) of Chinese lived in urban areas⁴, and many up-and-coming food trends are specific to cities, especially when it comes to interest in western food products. However, although Beijing and Shanghai may be the first places that come to mind when companies consider exporting to China, the country has 16 cities with a population of over 10 million, and 65 cities with more than one million inhabitants⁵. The proportion of Chinese living in urban areas is forecasted to exceed 75% by 2035⁶.

This report focuses on some of the most important market trends among Chinese consumers, especially with rising health consciousness among city-dwellers, and what foreign brands should consider when looking to launch a product in China.



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Market trends

Healthy eating has become a lifestyle choice for many Chinese, making China the most health-conscious country in the world – and more than 40% of consumers say they are willing to pay more for healthier options⁷.

The trend towards plant-based eating and plant protein is already well-established in China, the world's number one plant protein exporter⁸. It can process 79% of global soy protein isolate, and the Chinese government plans to halve meat consumption by 2030⁹. Nevertheless, per capita meat consumption has been rising steadily for three decades, as incomes have increased¹⁰.

Health consciousness is also driving the market for functional foods, and probiotics are a major focus. Awareness of probiotics has risen, particularly among younger Chinese consumers, as a growing body of research highlights their potential benefits¹¹.

Alongside novel foods and formats, China has a long history of using food to improve health. The health-giving properties of plants have been part of the fabric of Chinese culture for millennia, with botanicals forming the basis of traditional Chinese medicine (TCM), as well as many plants and extracts serving simultaneously as health ingredients and food ingredients¹². Examples include goji berries, schisandra, bitter melon, and ginger, all of which have a dual purpose as food ingredients and in TCM preparations.

In modern usage, the concept of *yangsheng*, which translates loosely as a nourishing lifestyle for health and wellbeing, is a fundamental part of Chinese food culture, and many concepts of TCM are incorporated in the diet¹³. Now, Chinese and foreign brands alike aim to leverage consumers' interest in plant ingredients and extracts in a wide range of new consumer packaged goods.

For foreign brands that aim to establish a presence in China, important initial considerations include:

Having a Chinese name that embodies the company's personality and helps attract attention online¹⁴.

Establishing a presence on Baidu (China's Google), where nearly two-thirds of Chinese consumers search for information on brands before purchasing a product. Social media and mobile apps are among the nation's most effective marketing channels¹⁵.

Registering the brand as a trademark in China. Under its 'first to file' rule, the first entity or individual to register IP rights will hold those rights exclusively regardless of the original user¹⁶.

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Probiotics

Chinese trends in probiotics

Food as medicine is a widely accepted concept in China, and the market for digestive health products is well-established. However, it is only in recent years that consumers have started to use probiotics – as well as a range of other dietary supplements – as an alternative to over-the-counter pharmaceutical digestive remedies, and the market is growing rapidly¹⁷.

In 2020, China surpassed the US and Europe to become the world's largest market for probiotic yoghurts and supplements¹⁸. Probiotics are now the biggest segment of the Chinese health food and supplements market, second only to vitamins and minerals, and digestive health is the most sought-after benefit¹⁹. Younger consumers in particular are helping to increase demand for probiotics, and several companies have invested in the growing probiotics sector, thereby boosting the market still further as new products appear in stores²⁰.

Foreign brands account for about 85% of the probiotic market in China, but local firms are also making strides in R&D and product development²¹. Ketuo Bio, for instance, has highlighted that clinical trials looking at its core strains have been performed in Chinese and Asian populations, while many trials of foreign probiotics focus on European or American populations. This may be

significant due to differences in dietary habits, as well as potential inherent differences, in the Chinese gut²².

Chinese brands often leverage their products' suitability for the Chinese microbiota in their marketing, including major player JuneYao Group, which also has been upgrading the number of colony-forming units (CFUs) in its probiotics, to ensure they each contain at least 100 billion²³.

China's probiotics market is dominated by Dupont de Nemours and Chr. Hansen, while major Chinese vendors like Health and Happiness International Holdings, By-Health, Beijing Scitop Bio-tech and Juneyao Grand Healthy Drinks and Wonderlab together account for less than 15% of sales²⁴.

Probiotics: Latest market developments

Investment and new product development in the Chinese probiotic sector is flourishing. In November 2020, Australia-based Beroni Group launched its Beilemei probiotic health product in China²⁵, and in March 2021, Swedish probiotic firm Probi partnered with Sinopharm, one of China's largest pharmaceutical companies, a move that provides further momentum to the Chinese probiotics market²⁶. Then in September 2022, US-based PanTheryx launched digestive health products including its TruBiotics probiotics in China, citing the country's surging health and wellness market²⁷.

At Hi & Fi Asia-China 2023, several Chinese companies and multinationals made significant moves on the Chinese probiotics market:

Novozymes OneHealth joined with Sanofi Consumer Jiankang Pharmaceuticals to promote probiotic health products²⁸.

Shanghai-based Bright Dairy launched a sour milk probiotic drink fermented with Chr. Hansen's lactic acid bacteria, available in three flavours: sweet and sour strawberry, delicious green apple, and refreshing lemon²⁹.

Junlebao introduced a kefir probiotic product called Kephan K-10 with 10 kinds of kefir lactic acid bacteria, which are fermented for around 10 hours for different flavour experiences³⁰.

Jinqi Biology launched a patented bacterium – *Lactobacillus paracasei* ET-22 – screened from the intestinal tract of healthy Chinese people and specifically targeted at the intestinal health of Chinese people³¹.

Regulation

Probiotics are regulated as functional foods in China and fall under the remit of the State Food and Drug Administration (SFDA)³².

The latest draft regulation for probiotics was published in 2019, and contains specific requirements for probiotic health foods³³. Some key points include:

Probiotics must be living microorganisms, with a CFU count of at least 10⁶ per millilitre or gram of finished product during its entire shelf life.

They must be safe and contain no genetically modified culture or metabolites.

The strain or strains used must be characterised and described, as well as the culturing conditions and preservation method.

Applicants should also provide documentation related to the health benefits of each strain³⁴.

Since 1996, more than 130 different probiotic health foods have obtained health food registration approval in China, with immunity-related claims the most popular, followed by digestive health claims³⁵.



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Alternative proteins

Local perceptions and demand

China has a long history of plant-based protein consumption. That may appear positive for the alternative proteins sector, but preferences for traditional plant protein foods such as tofu, tempeh, beans, and pulses do not necessarily translate into an appetite for newer plant-based proteins.

The Chinese meat market is divided, with about 43% of consumers striving to eat little to no meat, primarily for personal health reasons³⁶. On the other hand, the remaining 57% eat meat regularly and have no intention of reducing their consumption, a proportion that outstrips that of western markets (except the United States where this is true for 60% of consumers)³⁷.

Meanwhile, a younger generation of Chinese consumers is more curious about alternative proteins, such as plant-based meat and cultivated meat, with about 36% of urban-dwelling 19 to 28-year-olds willing to buy such products, according to a recent survey from ProVeg International³⁸. This group accounts for less than 20% of the country's population, but purchases 40% of new consumer products³⁹.

ProVeg China found nearly two-thirds (65.3%) of these younger consumers knew about plant-based meat, and of those, 43.2% had tried it in the past 12 months⁴⁰.

Those most likely to purchase plant-based meat were those who were most highly educated, and those who lived in Beijing and Shanghai, due to those cities' cultural diversity and faster economic development. Top purchase drivers were health, safety, nutrition, cost, and animal welfare, while only around 10% of respondents said environmental sustainability was their top consideration⁴¹.

*According to ProVeg: "In order to increase the purchase intention of plant-based meat among Gen-Z consumers in China, companies and organisations must focus on expanding consumer awareness and recognition of plant-based-meat products via improved market education."*⁴²

Similarly, a McKinsey survey found the sustainability claims that resonated most strongly with Chinese consumers were those that also related to personal health, such as antibiotic-free, pasture-raised, or free

range⁴³. It found that 70% rarely or never ate meat alternatives, compared to 40% of global consumers, while almost half said they were concerned about the taste, cost, nutritional value, or additives in such products. For global companies, it suggested that limited awareness of animal welfare and sustainability issues, as well as poor perception of meat alternatives' health benefits, could pose barriers⁴⁴.

*According to McKinsey, "Success would require investing significant time and resources to educate targeted consumers and build the market for relevant products. Making these efforts context specific — for example, linking new plant-based protein products to China's long history of eating tofu — might greatly enhance the odds of success."*⁴⁵

Regulation

The Chinese government is supportive of the alternative proteins industry, with a drive to ensure food security focused particularly on protein security, and a sustainable food supply. In a 2022 speech to the Chinese People's Political Consultative Conference, President Xi Jinping said: "It is necessary to expand from traditional crops and livestock and poultry resources to more abundant biological resources, develop biotechnology and bio-industry, and seek energy and protein from plants, animals, and micro-organisms."⁴⁶

China's agricultural five-year plan and National Development and Reform Commission's five-year plan not only include plant-based meat, but also cultivated meat products, otherwise known as cell cultured meat or lab-grown meat^{47 48}.

For foreign brands, key concerns include:

Gaining regulatory approval

This can be a complex process, and may be even more complicated for some manufacturers, as genetically modified ingredients are strictly controlled, and some of the ingredients used in plant-based meat products in other countries are not allowed in China, such as Impossible Foods' plant-based heme⁴⁹.

Finding a partner and dealing with trademarking issues

This could involve listing a trademark on menus, for instance, or agreeing parameters for a food operator to reformulate for local tastes⁵⁰.

Food safety and quality standards

A spate of major food safety scandals has left Chinese consumers particularly wary of unfamiliar food products, leading the government to tighten requirements for importers in 2022⁵¹.

Import/export forecast

China is the world's biggest consumer and producer of animal proteins, although its per capita consumption is about half that of the United States⁵². It produces the most pork, fish, and eggs worldwide, and is the second-largest producer of chicken⁵³. It is also the world's biggest importer of South American soy for animal feed, accounting for 55% of total exports from the region⁵⁴.

Asia Research and Engagement, a Singapore-based company helping companies in sustainable development, has advised China to ensure alternative proteins make up half of its protein volume by 2060 in an effort to achieve decarbonisation⁵⁵. The Chinese government has set guidelines to halve meat consumption, but for health and nutrition reasons⁵⁶.

Aside from a potentially massive market for meat alternatives as consumers are urged to shift away from meat, China's plant protein processing capacities make it a vital source of raw materials globally⁵⁷.

Already the world's top exporter of plant protein, the country has its sights set on using new technologies for alternative proteins, with its 14th five-year plan for agriculture making specific reference to cell-based meat, synthetic egg cream, and functional recombinant protein cultivation, and outlining measures to promote cell-based meat and other proteins⁵⁸. Chinese cellular protein company CellX received US\$6.5 million in June 2023 to launch the country's first cultured meat pilot plant⁵⁹.

Dao Foods International, an advocacy firm that supports the Chinese alternative proteins sector, is particularly enthusiastic about plant-based dairy due to a long history of dairy alternatives in China, and it is also backing the plant-based meat industry, including the local industry's leading player, Starfield⁶⁰. Dao Foods claims there are untapped investment opportunities in Chinese alternative proteins, saying on its website:

*"The 400 million millennials in China are willing to try new foods, and the macro environment is supportive of alternative proteins. That, and health-conscious consumers are increasingly reverting back to traditional Chinese diets that are more plant-based."*⁶¹



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Herbal extracts and botanicals

Local demand and perceptions

Principles of traditional Chinese medicine (TCM) are part of Chinese consumers' cultural heritage, and even as biomedicine is widely respected, TCM has an important influence on contemporary Chinese eating habits. This includes combining ingredients in certain ways or eating particular foods according to the season in the lunar calendar⁶².

When it comes to specific botanicals, Chinese associate certain plants and combinations of plants with various health benefits, and young people often incorporate TCM theories into a modern lifestyle by adding herbs to drinks and combining foods based on their properties⁶³. General preventive nutrition tends to focus on flavour (sweet, acrid, sour, bitter, and salty) and thermal properties of ingredients (hot, warm, neutral, cool, and cold)⁶⁴.

There are thousands of botanicals used in various TCM remedies, which are often sold in popular combinations for teas and soups⁶⁵. Some of the most widely used soup ingredients include fox nuts, Chinese red dates (jujube), goji berries, lotus seeds, Chinese yam, angelica root, codonopsis root, Solomon's seal root, lily bulb, and dried longan, among many others⁶⁶.

Mintel also highlights the popularity of plant-based drinks (made from soy, coconut, rice and oats, for example) in combination with botanical ingredients in China. Examples include Mixed Shine Muscat Flavoured Soy Milk, which combines GMO-free soy with Japanese muscat grape juice; Sokenbicha Herbal Tea made with 12 botanical ingredients, rice milk and soy milk; and Kagome Aojil Soy Latte, described as a cleansing green drink made with green vegetables, plant-origin lactic acid bacteria and soy milk⁶⁷.

According to Leatherhead Food Research, Chinese consumers generally have a positive impression of botanical ingredients, including multifunctional plant extracts, such as sweeteners, thickeners, colours, and preservatives⁶⁸. Examples include rosemary extract used as a preservative, stevia for sweetening, lycopene from tomatoes for colouring or as a nutritional ingredient, and baobab fruit pulp as a texturiser and sweetener⁶⁹.

Regulation

Companies using plant-derived ingredients must consider how they are regulated – whether as a food additive, novel food ingredient, or a functional food, for instance – and this will depend on their function within the finished product. Botanicals must also be well-characterised (including their Latin name and plant part or parts), and any health claims must be supported⁷⁰. In China, companies may make nutritional claims for botanical ingredients, if they qualify, and may also make Health Food functionality claims, which are restricted to a specific list updated in August 2023⁷¹. Claims must be supported by animal feeding trials, while some also require human feeding trials⁷².

Many TCM ingredients are permitted for use in food, including ginseng, dandelion, and goji berries⁷³. Late in 2023, nine ingredients became the latest to be recognised as suitable for use in both TCM and food: dangshen (*Codonopsis pilosula*), *Cistanche deserticola*, *Dendrobium officinale*, American ginseng, Milkvetch of the astragalus family, lingzhi (ganoderma), *Cornus officinalis*, *Gastrodia elata*, and *Eucommia ulmoides*⁷⁴.

Import/export forecast

China is the world's biggest exporter of medicinal and aromatic plants, accounting for more than 15% of global exports, according to the International Trade Centre (ITC)⁷⁵. The ITC suggests there may be market potential in stacking sustainability certifications, such as 'organic' and 'fair', and developing certified markets for cultivated and wild-harvested plants from China could help ensure stable livelihoods for those in the sector, who are often the country's rural poor.

"Ingredients and products often carry both certifications, and there is evidence that the market is increasingly demanding dually certified organic and fair products," the ITC said in a recent report⁷⁶.

According to Fairtrade International, the proportion of certified herbs, spices and teas is increasing year-on-year, and Fair Trade USA also has reported double-digit annual growth in certified imports⁷⁷. Meanwhile, the organic food market is growing rapidly, boosting demand for certified organic botanical ingredients⁷⁸. In the US, the organic food market broke through the \$60 billion mark for the first time in 2022⁷⁹, while in Europe, organic sales reached €52 billion in 2020, led by Germany, France, and Italy⁸⁰.

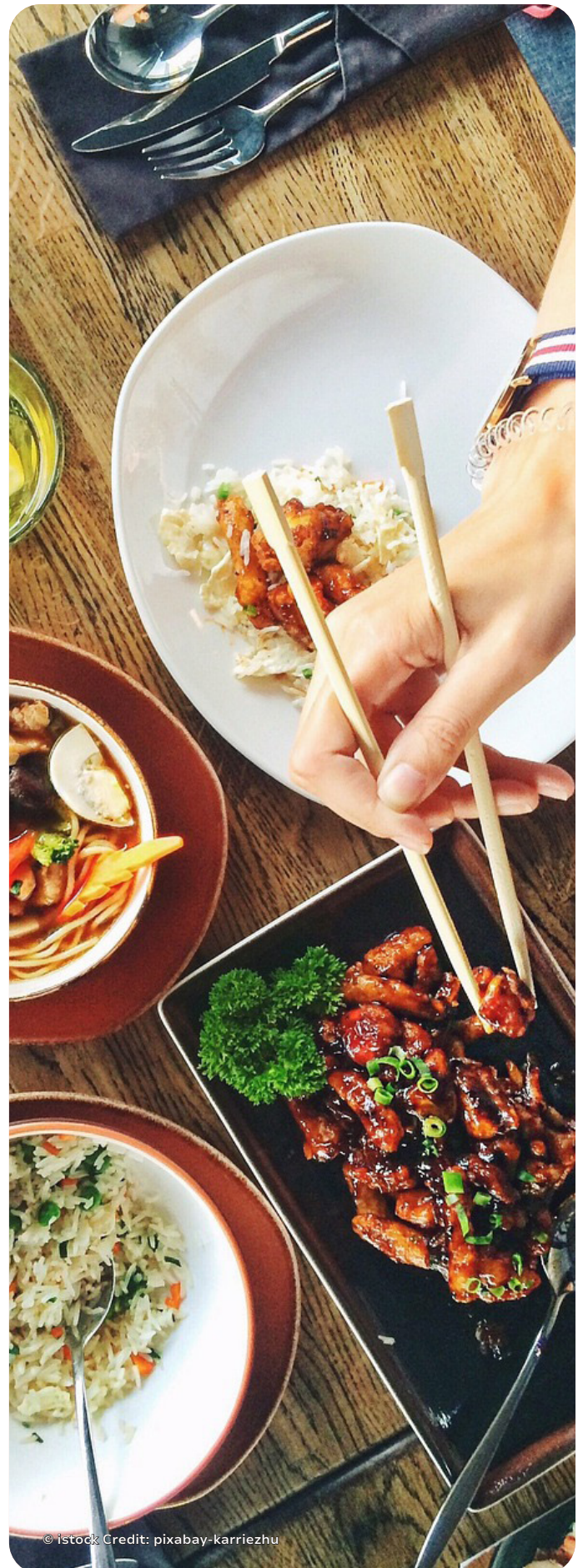
For Chinese exporters, it is important to bear in mind that consumers are not the main driver of the growth in organic certification in Europe. Instead, buyers are requiring more traceability and cross-contamination prevention in their supply chains, particularly as the European Green Deal has set new rules for sourcing from developing countries to reduce the use of pesticides, increase organic production, and promote sustainable packaging materials⁸¹.



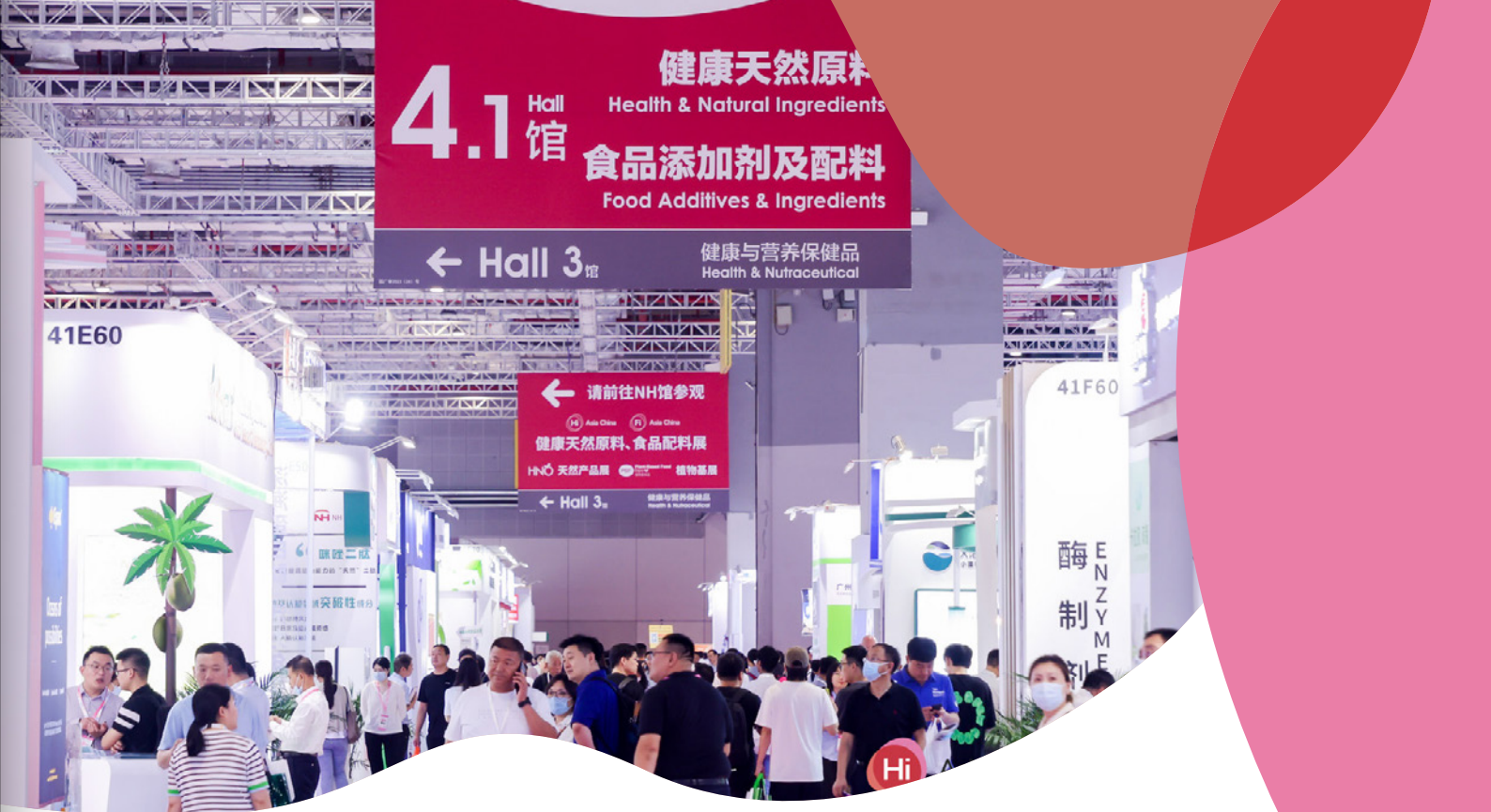
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Key takeaways

- Urban-dwelling Chinese are driving new trends in healthy eating, and a large proportion is willing to spend more for healthier options
- Plant protein foods are well-established in China, but there is still work to do to convince consumers of the benefits of plant-based meat alternatives
- Personal health is the top purchase driver for consumers of plant-based meat, while there is low awareness of sustainability considerations
- The Chinese government has set guidelines to halve meat consumption for health, nutrition, and food security reasons
- The younger generation of Chinese adults is the most receptive to plant-based meat and dairy alternatives, and probiotics
- The probiotics market is dominated by foreign brands, but Chinese companies emphasise the benefits of testing probiotic strains with Chinese consumers
- Probiotic investment is flourishing and many Western companies are partnering with Chinese firms in the sector to access the market
- Immunity-related health claims dominate in probiotic health foods, followed by digestive health claims
- Traditional Chinese medicine has an important influence on contemporary approaches to healthy eating
- Consumers may find botanical ingredients appealing in diverse product categories for their health properties
- Stacking certifications like 'organic' and 'fair' could help botanical suppliers tap into a growing global market niche



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Hi & Fi Asia-China: China's one-stop-shop for the food and health industry

Hi & Fi Asia-China is a three-day trade show that takes place in Shanghai each year. Healthplex & Nutraceutical Products China, ProPak China & FoodPack, and Starch Expo offer a single platform for sourcing new ingredients, finished health products, processing and packaging solutions. With more than 2300 exhibitors, the event serves China's ever-growing food and nutraceutical industry and is comprehensively tailored to the region's unique requirements.

The numbers for Hi & Fi Asia China speak for themselves: with over 12,000 visitors coming from more than 115 countries, the event attracts business professionals, manufacturers, and suppliers and helps them make meaningful connections, establish long-lasting ingredient sourcing partnerships, and find inspiration for new product development thanks to more than 30 information-packed content sessions.

to sourcing ingredients, raw materials, services, and functional products. Taking place from **19 to 21 June 2024** at the **National Exhibition and Convention Center in Shanghai**, Hi & Fi Asia-China is the event that is shaping China's health and nutrition landscape.

Don't miss Hi & Fi Asia-China, the gateway to success for health and food industry professionals in the region.

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