Consumer Health in China

EXECUTIVE SUMMARY

Consumer health in 2023: The big picture
2023 key trends
Competitive landscape
Retailing developments
What next for consumer health?

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Vitamins and dietary supplements registration and classification
Self-medication/self-care and preventive medicine
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DISCLAIMER

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Analgesics in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Outbreaks of COVID-19 and influenza stimulate the consumption of analgesics
The market demonstrates a preference for specific active ingredients
Topical analgesics/anaesthetic continues to exhibit robust growth

PROSPECTS AND OPPORTUNITIES

Systemic analgesics poised for continued steady growth due to increasing consumer awareness
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Combination products are gaining ground in sleep aids
Domestic players venture into the category, due to health food filing system

PROSPECTS AND OPPORTUNITIES

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Sleep aids set to keep being stretched, with innovative ingredients

CATEGORY DATA

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Cough, Cold and Allergy (Hay Fever) Remedies in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

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Systemic antihistamines/allergy remedies has great growth potential
Combination products outperforms the market thanks to national endorsement

PROSPECTS AND OPPORTUNITIES

Return to slower growth expected for cough remedies and pharyngeal preparations
Paediatric cough, cold and allergy remedies has the strongest growth potential

CATEGORY DATA

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Dermatologicals in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Holistic health concerns boost sales of dermatologicals
Hair loss treatments continues to be the most promising category

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E-commerce set to see ongoing growth
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Digestive Remedies in China

KEY DATA FINDINGS

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Herbal/traditional digestive remedies are increasingly favoured by consumers
Penetration of e-commerce continues to rise

PROSPECTS AND OPPORTUNITIES
Digestive remedies is saturated, and therefore has limited growth potential
Laxatives set to experience stronger competition from outside the category

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Eye Care in China

KEY DATA FINDINGS

2023 DEVELOPMENTS
Use of digital devices continues to drive steady growth for eye care
Japanese manufacturers are currently facing significant challenges and dilemmas

PROSPECTS AND OPPORTUNITIES
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CATEGORY DATA
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Wound Care in China
KEY DATA FINDINGS

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Resurgence of outdoor activities drives rebound for wound care
Technological innovations shape awareness and the need for proper wound care
Convenience and efficiency are the legacy of O2O platforms

PROSPECTS AND OPPORTUNITIES
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Further specialised solutions expected in wound care

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Sports Nutrition in China

KEY DATA FINDINGS

2023 DEVELOPMENTS
Return of outdoor activities and sports engagements drive full recovery for sports nutrition
Convenient formats attract younger consumers
Lifting of COVID-19 restrictions brings back the buzz for protein/energy bars

PROSPECTS AND OPPORTUNITIES
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Interest-based e-commerce has become a new battlefield

CATEGORY DATA
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Dietary Supplements in China

KEY DATA FINDINGS

2023 DEVELOPMENTS
“Fourth meal” becomes a new choice for Chinese consumers in their pursuit of health
COVID-19-related dietary supplements usher in sales surges for specific categories
Glucosamine sees a decline due to intensified competition

PROSPECTS AND OPPORTUNITIES
Fast-paced lifestyles will accelerate the growth of liver health products
Nurturing health gaining traction amongst younger consumers

CATEGORY DATA
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**Vitamins in China**

**KEY DATA FINDINGS**

**2023 DEVELOPMENTS**

Demand for vitamins rises due to COVID-19
Paediatric vitamins maintains healthy growth despite the declining birth rate
Interest-based e-commerce propels online sales of vitamins

**PROSPECTS AND OPPORTUNITIES**

Older consumers will become a new target group for vitamins
The shifting focus of women's vitamins

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**Weight Management and Wellbeing in China**

**KEY DATA FINDINGS**

**2023 DEVELOPMENTS**

Health concerns remain a key factor for decline in weight management and wellbeing
Increasing focus on immunity drives dynamic growth for supplement nutrition drinks
E-commerce platforms are crucial for the distribution of weight management and wellbeing products

**PROSPECTS AND OPPORTUNITIES**

Diverse performances across different categories
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**Herbal/Traditional Products in China**

**KEY DATA FINDINGS**

**2023 DEVELOPMENTS**
Recovery for nurturing products in herbal/traditional dietary supplements
Due to the pandemic, herbal/traditional cough, cold, and allergy (hay fever) remedies attracts attention

PROSPECTS AND OPPORTUNITIES
Heated market for herbal/traditional dietary supplements for liver health
Herbal/traditional digestive remedies set to experience continued growth in demand

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Paediatric Consumer Health in China

KEY DATA FINDINGS

2023 DEVELOPMENTS
Declining birth rate does not hinder growth for paediatric vitamins and dietary supplements
Paediatric OTC experiences a trend towards diversification

PROSPECTS AND OPPORTUNITIES
Diversification of paediatric vitamins and dietary supplements
Steady growth expected in paediatric OTC

CATEGORY DATA
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