

# CHILDREN'S NUTRITION - CHINA - 2024

With the current trend for precise and science-based parenting, uncovering potential appetites that exist in the gaps between current product ranges and demographic demands has become an important jumping-off point for product innovation.



Qianqian Ji, Senior Analyst, China Insights



# Report Content

## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Definition
- What you need to know

### The market

- Market factors
- Marketing activities
- Product innovation with children claims has slowed in general, but activity is up in some categories
  - Graph 1: category distribution of new food, drink\* and healthcare products with the children claim (5-12 years old), January 2019-December 2023
  - Graph 2: share of new food, drink\* and healthcare launches with children and babies & toddlers claims, 2019-23
- New product trends

### The consumer

- Emotional and bone development issues are growing rapidly
  - Graph 3: children's health issues, 2022-23
- Height is the biggest and fastest-growing issue of concern
  - Graph 4: parents' health concerns, 2022-23
- 'Minus' concept snacks may be the next innovation opportunity
  - Graph 5: the necessity of measures for managing children's health, 2023
- Online channels top the list for parents acquiring nutritional knowledge
  - Graph 6: sources of information on child nutrition, 2023
- Parents consider daily meals and snacks to be important sources of key nutrients
  - Graph 7: sources of nutrition for children, 2023
- Efficacy-related claims are a must-have selling point for health supplements, and increased palatability for children adds value
  - Graph 8: purchasing drivers for choosing children's dietary supplements, 2023
- Parents prefer food and drinks based on natural ingredients and with no/low sugar claims
  - Graph 9: attitudes towards children's nutrition, 2023

### Issues and insights

### What we think

## THE MARKET

### Market factors

- The number of children will decline year by year as a result of the falling birth rate
  - Graph 10: % of population aged 5-14, 2013-22
  - Graph 11: birth rate (‰), 2013-22
- Increased focus on balanced nutrient intake, light food and healthful snacks
  - Graph 12: Results of an online poll asking "What's your biggest concern about ready meals in schools?"
- Consumers' willingness to invest in children's health continues to grow despite the intentional spending trend
  - Graph 13: value sales of children's health/dietary supplements, 2022-23

### Marketing activities

- Charitable approaches enhance brand recognition among the public
- Storytelling strengthens the links between product efficacy and consumer hearts and minds
- Linking healthful snacks to nutritional science

### New product trends

- Product innovation with children claims has slowed in general, but activity is up in some categories
  - Graph 14: share of new food, drink\* and healthcare launches with children and babies & toddlers claims, 2019-23
  - Graph 15: category distribution of new food, drink and healthcare products with the children claim (5-12 years old), January 2019-December 2023
- A growing proportion of innovative products contain botanical/herbal ingredients
  - Graph 16: launches with botanical/herbal ingredients as a proportion of all food, drink\* and healthcare launches targeting children (aged 5-12), 2019-23
- The concept of 'clean ingredients' is on the rise
  - Graph 17: launches with low/no/reduced trans fat claims as a proportion of all food, drink\* and healthcare launches targeting children (aged 5-12), 2019-23
- An imbalance between market supply and demand leads to slower innovation in children's products focusing on bone health
  - Graph 18: launches focusing on bone health as a proportion of all food, drink\* and health/nutritional supplement launches targeting children (aged 5-12), 2019-23
- A 'golden ratio' enhances the effectiveness of active substances
- Age-specific nutrition caters to the precision parenting trend
- Build on a base of nutritious ingredients kids don't always enjoy

## THE CONSUMER

### Children's health issues

- Emotional health and bone development problems are growing rapidly

- Graph 19: children's health issues, 2022-23
- Strong correlation between bone development problems and gastrointestinal problems
  - Graph 20: parents' health concerns, by children's health issues, 2023
- Height continues to be the most important and fastest-growing concern for parents
  - Graph 21: parents' health concerns, 2022-23

## Necessary approaches to managing children's health

- Parents' belief in the necessity of 'light' food for children is relatively strong...
  - Graph 22: the necessity of measures for managing children's health, 2023
- ...but most won't take action, especially in lower-income families
  - Graph 23: the necessity of measures related to a 'light diet' for managing children's health, 2023
  - Graph 24: the necessity of measures related to a 'light diet' for managing children's health, by monthly household income, 2023

## Sources of knowledge on child nutrition

- Online channels top the list for parents acquiring nutritional knowledge and making purchasing decisions
  - Graph 25: sources of information on child nutrition, 2023
- Online content platforms and specialist offline channels are more popular with higher-income households
  - Graph 26: sources of information on child nutrition, by monthly household income, 2023
- For parents of children with bone development problems, specialist offline services are more appealing
  - Graph 27: sales assistants in mother and baby specialty stores, by children's health issues, 2023

## Sources of nutrition

- Snacks that highlight specific nutrients and supplements that highlight functionality are more appealing to parents
  - Graph 28: sources of nutrition for children, 2023
- Micronutrients and unsaturated fatty acids appeal more in milk powder

## Purchasing drivers for choosing children's dietary supplements

- Parents find efficacy-related claims more appealing, and increased palatability for children can add value
  - Graph 29: purchasing drivers for choosing children's dietary supplements, 2023
- Brand awareness and product segmentation attract parents with higher education levels and income
  - Graph 30: purchasing drivers for choosing children's dietary supplements, by education level, 2023

## Attitudes towards children's nutrition

- Food and beverages flavoured and coloured with natural ingredients are more popular with parents and children
  - Graph 31: attitudes towards children's nutrition, 2023
- No/low sugar and contains sugar substitutes claims are favoured over regular sugar
  - Graph 32: attitudes towards child nutrition – attitudes towards natural sugar/sugar substitutes, 2023
- Consumers are relatively willing to buy age-specific nutrition products
- Parents whose children have mood/sleep problems need more targeted nutritional guidance and product advice

- Graph 33: attitudes towards children's nutrition, by children's health issues, 2023

## ISSUES AND INSIGHTS

### **Prospects remain bright in the bone health/height spaces**

- An imbalance between supply and demand leads to market adjustments, but consumer interest continues to grow rapidly
- With severe ingredient homogenisation, product innovation needs to tap into new potential demand...
- ...such as the impact of gut health on bones and height
- Bone health is a gap in the probiotic category
- Children's milk powder brands can emphasise the link between micronutrients and bone health in their communications

### **Balance palatability and nutritional value with natural ingredients**

- Trend: children's products boasting both palatability and a basis in nutritional science will be increasingly popular
- Opportunity: natural ingredients simultaneously meet parents' demand for nutrition and palatability
- The challenge: how to bridge the sensory gap between natural and artificial additives

### **Use the 'stage-specific' concept to precisely target consumer segments**

- Extend the age-specific concept to 'stage-specific' as a premiumisation strategy
- Immunity and digestive problems can be key functional claims for stage-specific children's health products
  - Graph 34: children's health issues, by attitudes towards children's nutrition, 2023
- Segment and position products to target micro-needs derived from the physiological characteristics of children in different age groups
- Examples of products containing different popular ingredients for children's immunity and digestive problems
- Stage-specific minus claim snacks help parents wean children off heavily-flavoured food

## APPENDIX – METHODOLOGY AND ABBREVIATIONS

- Methodology
- Abbreviations

### Disclaimer

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a Chinese licensed market survey agent ([See Research Methodology for more information](#)).

### Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at <http://www.mintel.com/terms>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

### Published by Mintel Group Ltd

[www.mintel.com](http://www.mintel.com)

### Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850