

PURCHASING FOOD AND DRINK FOR CHILDREN – CHINA – 2024

The children's food market is becoming more regulated. In addition to upgrading their products, brands and companies should actively support parents in educating their children on healthy eating and providing them with a happy childhood.



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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Definition
- What you need to know

The Market

- Market factors

Companies and Brands

- Marketing activities
- New product trends
- Examples of products that reflect these trends

The consumer

- Seize the opportunity in nuts for children
 - Graph 1: category penetration, 2023
- Social ecommerce's influence on younger parents is not to be overlooked
 - Graph 2: purchase channel, 2023
- Dairy products can help parents tackle leading health issues in children
 - Graph 3: consumption purpose, 2023
- Parents value the nutritional content of children's food
 - Graph 4: purchase factor, 2021 vs 2023
- Low intake of vegetables/fruits is the most prominent dietary issue in children
 - Graph 5: concerns on diet, 2022 vs 2023
- Consumer segmentation

Issues and insights

What we think

THE MARKET

Market Factors

- China's child population aged 0-17 remained stable from 2010 to 2020, but birth rate continues to fall
 - Graph 6: birth rate and rate of natural increase in population, 2013-2023
- WHO reiterates its recommendation to strengthen regulation of children's food marketing

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- Stakeholders introduce a series of group standards for children's food market, and the 'Food Education Improvement' Accreditation promotes food education
- List of group standards issued and in development since 2020
- Attitudes towards parenting change, and companionship becomes more important

COMPANIES AND BRANDS

Marketing Activities

- Children's food and drink brands actively participate in developing group standards and white papers
- babytree contributes to Age-specific Nutritional Guidelines for Chinese Children, setting the course for age segmentation in children's nutrition
- IP co-branding appeals to children and grown-ups alike
- Organise offline events to increase interaction with kids and adults

New Product Trends

- Share of products with children claims decreases
 - Graph 7: share of food and drink launches with children* claims, 2019-23
- Overview of sub-category innovation
- Global major sub-categories in new children's food and drink products
- Fastest growing sub-categories in new children's food and drink products in China
- Innovations in plant-based dairy drinks in the China market
- Overview of innovations in claims categories
 - Graph 8: share of new food and drink products with children* claims in the last five years, by claim, 2019-23
- New products with suitable for claims in the international market
- Overview of innovations in functional claims
- Major functional claims in global new children's food and drink products
- Major functional claims in new children's food and drink products in China
- New products with digestive functional claims in China
- Energy replenishment functional claims deserve more attention in the domestic market

THE CONSUMER

Category penetration

- Unlock the potential in nut products for children
 - Graph 9: category penetration, 2023
- Diversified nut products are worth exploring
- Food and drinks for school-age children are worth exploring
 - Graph 10: category penetration of products for children, by age and gender of children, 2023
- Impress younger parents with high-nutrition Chinese dishes

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- Graph 11: category penetration of selected categories, by age of parents, 2023

Purchase channel

- Specialty stores and convenience stores compete with mainstream shopping channels
 - Graph 12: purchase channel, 2023
- Higher-income families have strong purchasing power but trade-up spending by low- and middle-income families is not to be underestimated
 - Graph 13: purchase channel – selected channels, by monthly household income, 2023
- Lock on to social ecommerce's influence on younger parents
 - Graph 14: purchase channel, by plan to have more children, 2023
 - Graph 15: purchase channel, by age of parents, 2023

Consumption purpose

- Dairy products can help parents solve top health concerns in children
 - Graph 16: consumption purpose, 2023
- Biscuits with functional benefits have a greater appeal to younger parents
 - Graph 17: consumption purpose – biscuits, by age of parents, 2023
- High- and middle-income families are more likely to use biscuits and juice to manage children's emotions
 - Graph 18: consumption purpose – to appease/reward children, by monthly household income, 2023

Purchase factors

- Parents are placing more importance on health benefits and nutrition of products compared to the past
 - Graph 19: purchase factor, 2021 vs 2023
- All eyes are on products that are free from artificial preservatives and colourings
 - Graph 20: health claims in new food and drink products for children*, 2021-23
- Younger parents are paying closer attention to products' age suitability and warning labels
 - Graph 21: purchase factor – selected factors, by age of parents, 2023
- Backing up nutritional value with product certifications makes it more convincing to consumers
 - Graph 22: purchase factor – selected factors, by choice of purchase factor, 2023

Concerns on diet

- Low intake of vegetables/fruits is the most prominent dietary issue in children
- Parents are increasingly worried about children's bad eating behaviours
 - Graph 23: concerns on diet, 2022 vs 2023
- Differentiate products by tackling related poor eating habits in children
 - Graph 24: concerns on diet – selected concerns on diet, by choice of other concerns, 2023
- Children prefer deep-fried food more as they age
 - Graph 25: concerns on diet, by age of children, 2023
- Choose healthy ingredients and optimise production processes to satisfy children's taste buds

Consumer segmentation

- Three types of parents
 - Graph 26: consumer segmentation, 2023
- Who are they?
- Overview of demographic distribution
- Give concerned parents peace of mind with a full emphasis on the products' nutritional value
 - Graph 27: purchase factor – selected factors, by consumer segmentation, 2023
- Biscuits with high nutritional value will appeal more to relaxed parents
 - Graph 28: consumption purpose (biscuits) – selected purposes, by consumer segmentation, 2023
- Expert endorsement attracts assertive parents
 - Graph 29: factors for choosing dietary supplements – recommendation by professionals, by consumer segmentation, 2023

ISSUES AND INSIGHTS

Expand the product range and resist homogenisation by developing dairy products for children

- Dairy products are the most prominent category in children's food and drinks with the most intense market competition
- Development of domestic children's dairy sub-categories reaches a plateau with high homogenisation in existing categories
- Plant-based dairy drinks – starting from nut milk
- Plant-based dairy products – making the most of children's favourite characteristics

Be moderately indulgent to provide children with a wonderful childhood

- Children want delicious but not-so-healthy food and drinks, and it's not easy to say no to them
- Balance taste and health for better acceptance by children
- ...or highlight zero or low levels of undesirable additives to reassure parents
- Portion control and moderate indulgence

Facilitate children's mental and physical development through age segmentation in food and drinks

- Tailor key points in food education for each age group
- Pre-school – focus on educating parents on children's diet
- Early school age – make learning about food and drinks enjoyable for children
- Older children – convey scientific concepts through brand events and help children understand the world they live in

APPENDIX – METHODOLOGY AND ABBREVIATIONS

- Methodology
- Abbreviations

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