



2021健康营养行业品牌渠道 发展洞察

Insights into Brand Channel Development of Health & Nutrition Industry 2021

NHNE 中国国际健康营养博览会
China International Natural Health
& Nutrition Expo (NHNE)



1200+健康营养品牌方问卷调研

More than **1200** health &
nutrition brand questionnaires

10000+活跃专业观众数据调研

Data research of more than **10000**
active professional visitors

有关品牌商 & 渠道商的N个事实

N facts about brands & channels

从展会视角看行业

Viewing the industry from the
perspective of exhibitions

历时 **285** 天

285 days

31次深度访谈

31 in-depth interviews

57次企业走访

57 business visits

有关品牌商的N个事实

N facts about brands

2020	销售额 Sales volume	品类分布 Distribution of product categories	剂型分布 Distribution of dosage forms	渠道分布 Distribution of channels
2021	销售额目标 Sales targets	渠道 Channels	供货方式 Supply modes	剂型/新品 Dosage forms/New products

77.3% 企业销售保持增长

77.3% of enterprises maintained a sales growth

近80% 企业保持年销售额增长

Nearly 80% of enterprises maintained an annual sales growth

31.8% 企业增长率超过50%，**13.6%**企业增长率超过100%

31.8% of enterprises had a growth rate of more than 50%, and **13.6%** of enterprises had a growth rate of more than 100%

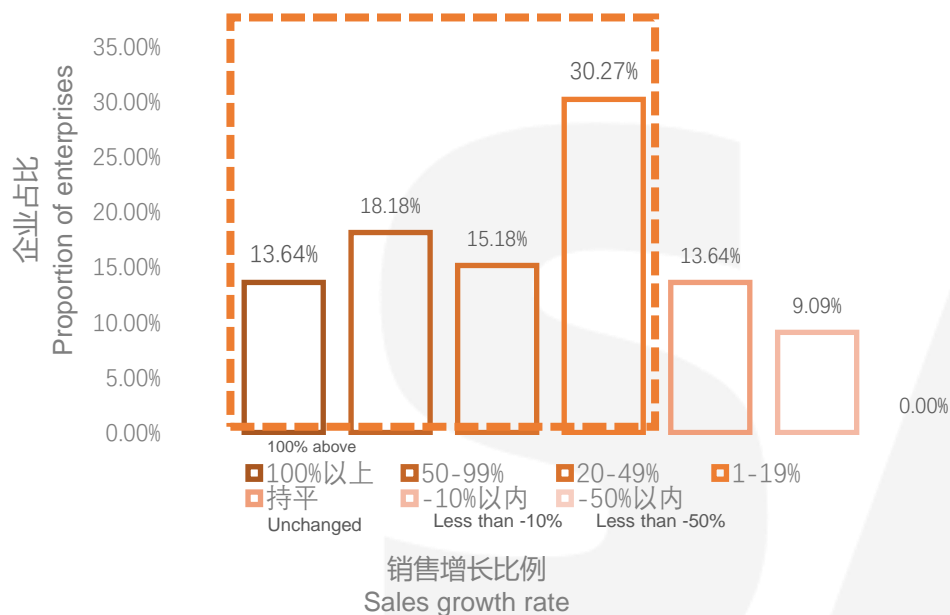
65% 企业保持毛利额增长

65% of enterprises maintained a growth in gross profits

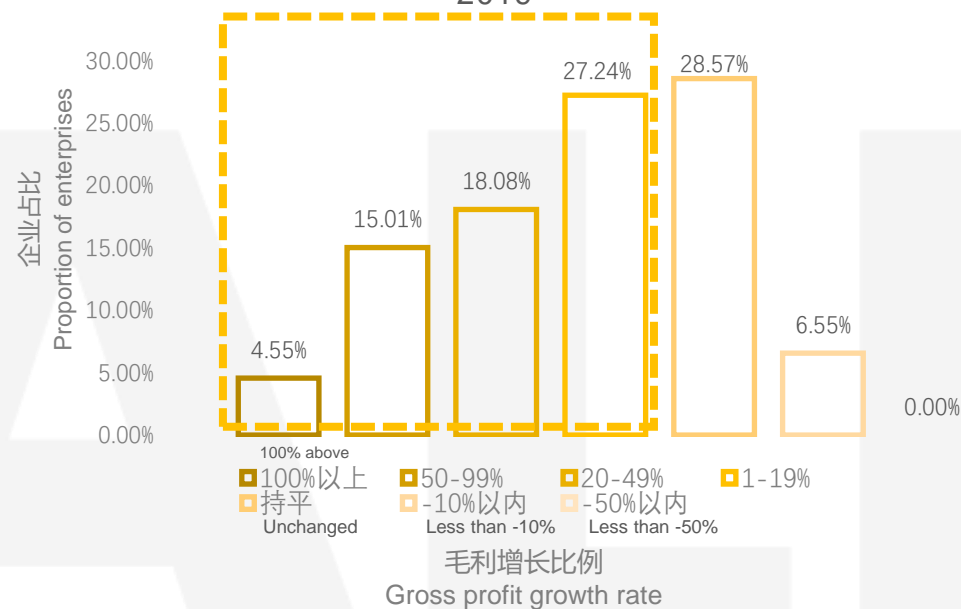
19.5% 企业增长率超过50%，**4.5%**企业增长率超过100%

19.5% of enterprises had a growth rate of more than 50%, and **4.5%** of enterprises had a growth rate of more than 100%

2020年较2019年**销售**实际增长比例
Actual sales growth rate in 2020 compared with 2019



2020年较2019年**毛利额**增长比例
Gross profit growth rate in 2020 compared with 2019



84.5%企业销售额保持在800万元以上

84.5% of enterprises maintained a sales volume of more than 8 million yuan

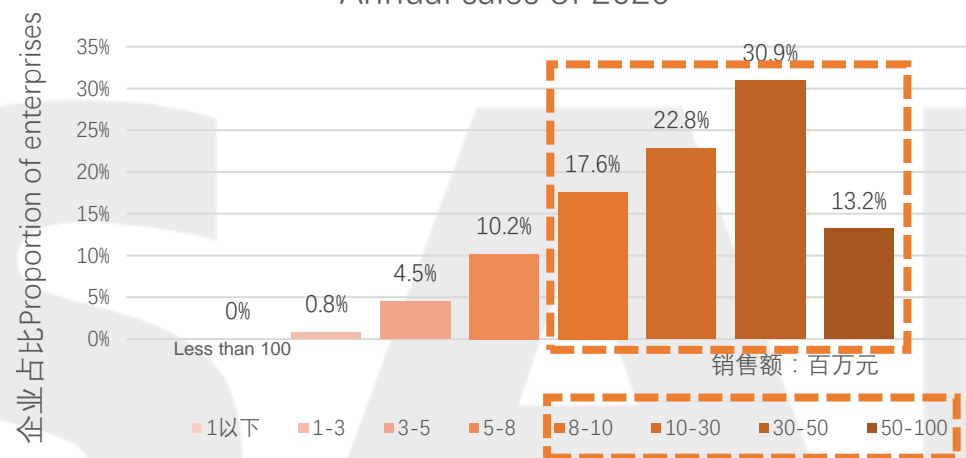
94% 企业保持500万以上上年销售额

94% of enterprises maintained an annual sales volume of more than 5 million yuan

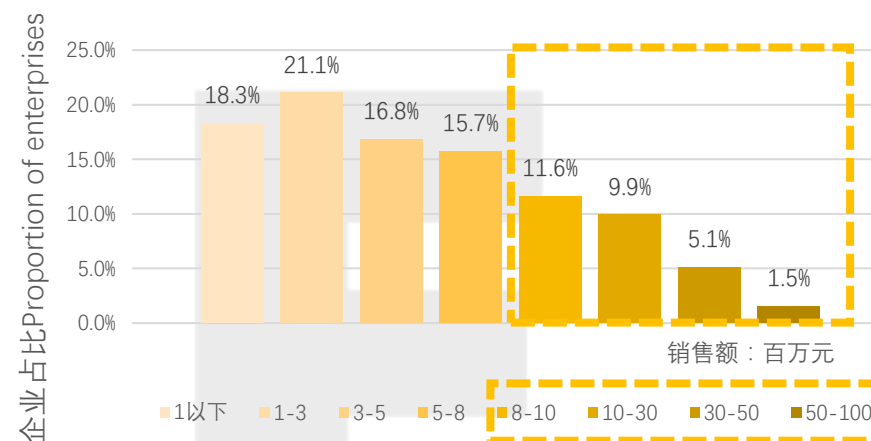
28% 企业通过NHNE达成超800万 销售额目标

28% of enterprises achieved the sales target of more than 8 million through the NHNE

2020年全年销售额
Annual sales of 2020



2020年通过NHNE达成的销售额
Sales volume achieved through NHNE in 2020



2020年品牌商的品类分布?

Category distribution of brand owners in 2020

NO.2 7.81%

老年营养

Nutrition for
the elderly

增强免疫

NO.1 10.94%

Immunity enhancement

NO.3 7.29%

改善睡眠

Sleep improvement

NO.5 6.75%

儿童营养
缓解疲劳

Childhood nutrition
and Fatigue relieving

NO.4 6.79%

肠胃养护

Intestinal health

NO.7 5.21%

美容养颜
身材管理
孕期营养
Beauty,
figure management
& pregnancy
nutrition

NO.6 6.25%

骨骼健康

Bone health

NO.9 4.16%

调节三高

Hypertension,
hyperglycemia and
hyperlipemia regulation

NO.10 3.65%

特殊膳食

Special diets

NO.8 4.18%

运动营养

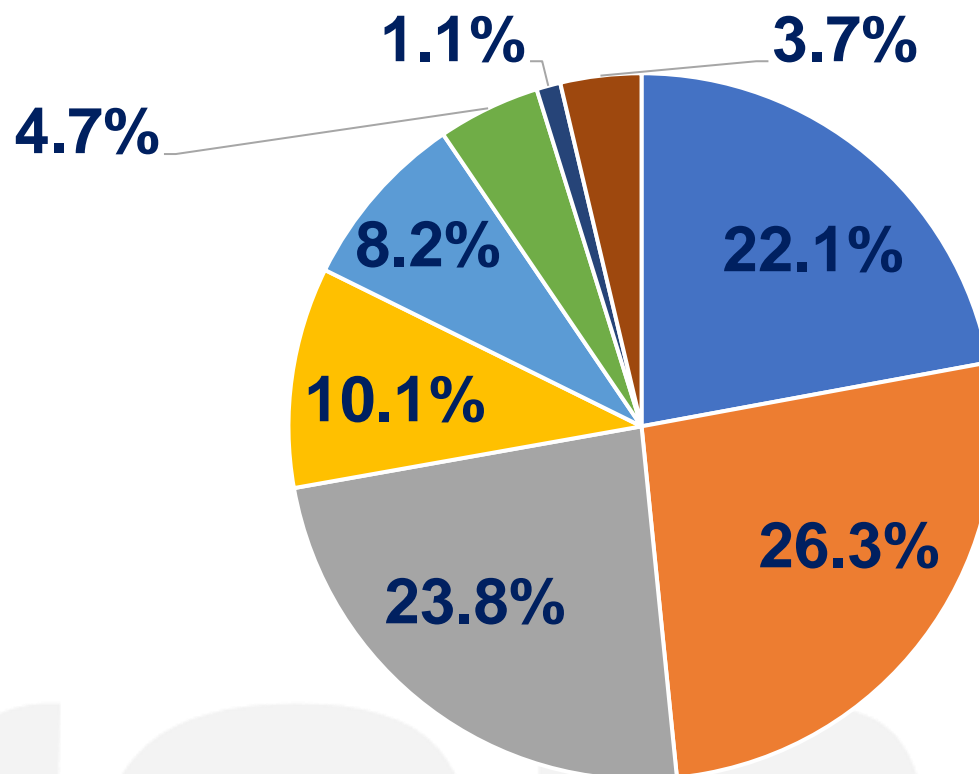
Sports nutrition

护肝 5.21%其他
明目 5.21% Others
改善贫血
清咽利喉
Liver protection,
eye care, anemia
improvement,
throat clearing

Innovation Makes the Future

2020年品牌商的产品剂型分布?

Dosage form distribution of brand owners in 2020



■ 粉剂 ■ 片剂 ■ 胶囊 ■ 口服液 ■ 糖果 ■ 果冻 ■ 晶球 ■ 其他
Powder Tablets Capsules Oral liquid Sweets Jelly Crystal balls Others

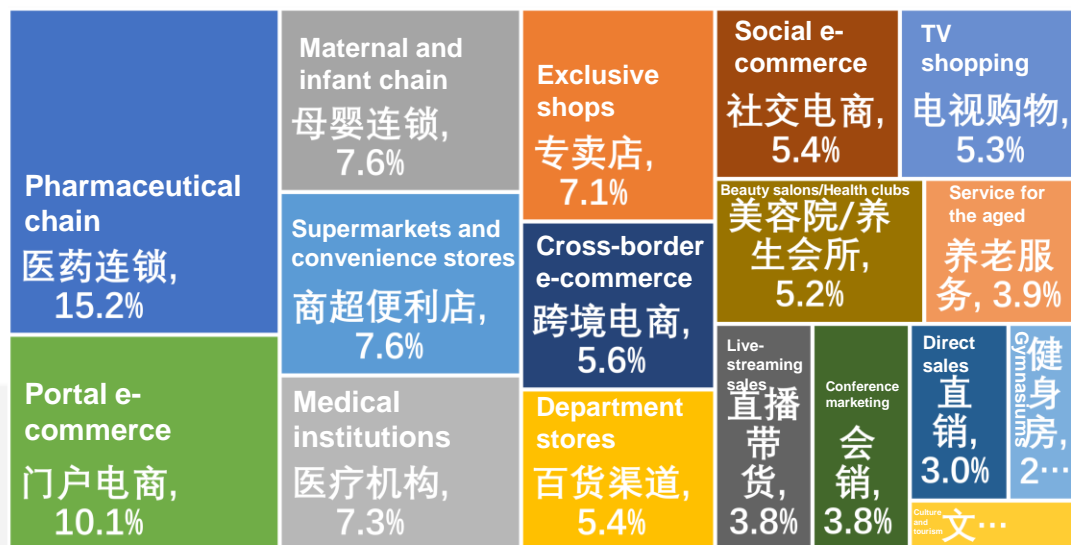
Innovation Makes the Future

2020年品牌商的渠道分布?

Channel distribution of brand owners in 2020

2020年品牌方的营销渠道

Marketing channels of brand owners in 2020



较2019年的渠道变化

Change in channels compared with 2019

增加: 医药连锁、专卖店、百货渠道、直播带货、母婴连锁、门户电商、跨境电商、社交电商、美容院/养生会所、养老服务、健身房

Increase: pharmaceutical chain, exclusive shops, department stores, live-streaming sales, maternal and infant chain, portal e-commerce, cross-border e-commerce, social e-commerce, beauty salons/health clubs, service for the aged, gymnasiums

持平: 商超便利店、直销、会销、电视购物、医疗机构

Unchanged: supermarkets, convenience stores, direct sales, conference marketing, TV shopping, medical institutions

减少: 文化旅游

Decrease: culture and tourism

2020年最大的销售渠道

The largest sales channel in 2020

医药连锁

pharmaceutical chain

2020年最大的线上销售渠道

The largest on-line sales channel in 2020

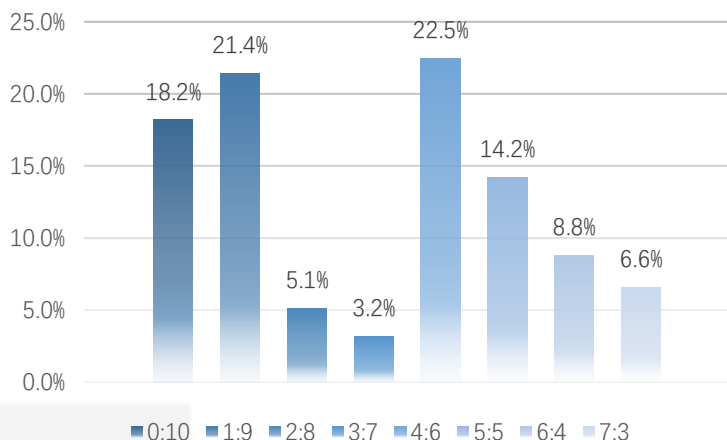
天猫 京东 苏宁易购 拼多多 社群营销 淘宝

Tmall, JD.com, Suning.com, Pinduoduo, community marketing, Taobao

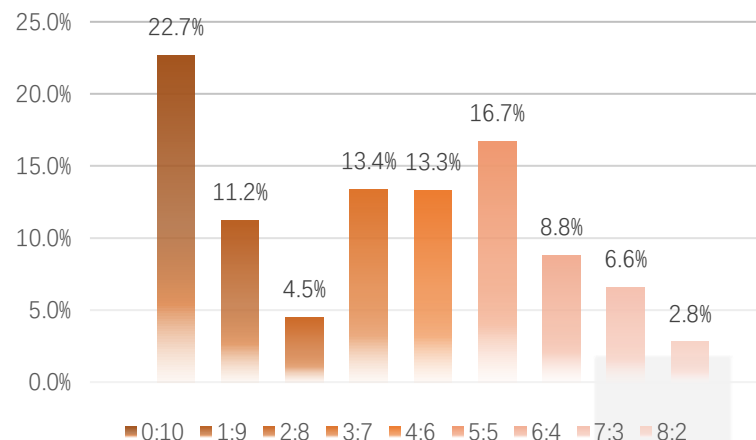
2020年品牌商的渠道分布?

Channel distribution of brand owners in 2020

线上线下的销售比例 Online and offline sales ratio



线上线下的利润比例 Online and offline profit ratio



销售额 Sales volume

企业重点投入线下渠道占据了较大比例，也有相当数量的企业在同步布局线上线下渠道

Many enterprises focus on offline channels, and a considerable number of enterprises simultaneously layout online and offline channels

利润额 Profits

大多数的企业线下投入收获的利润高于线上利润

Most enterprises achieved a growth in offline sales

2021

品牌商计划做哪些改变?

What changes will brand owners make in 2021?

品牌商眼中的合作伙伴将发生怎样的变化?

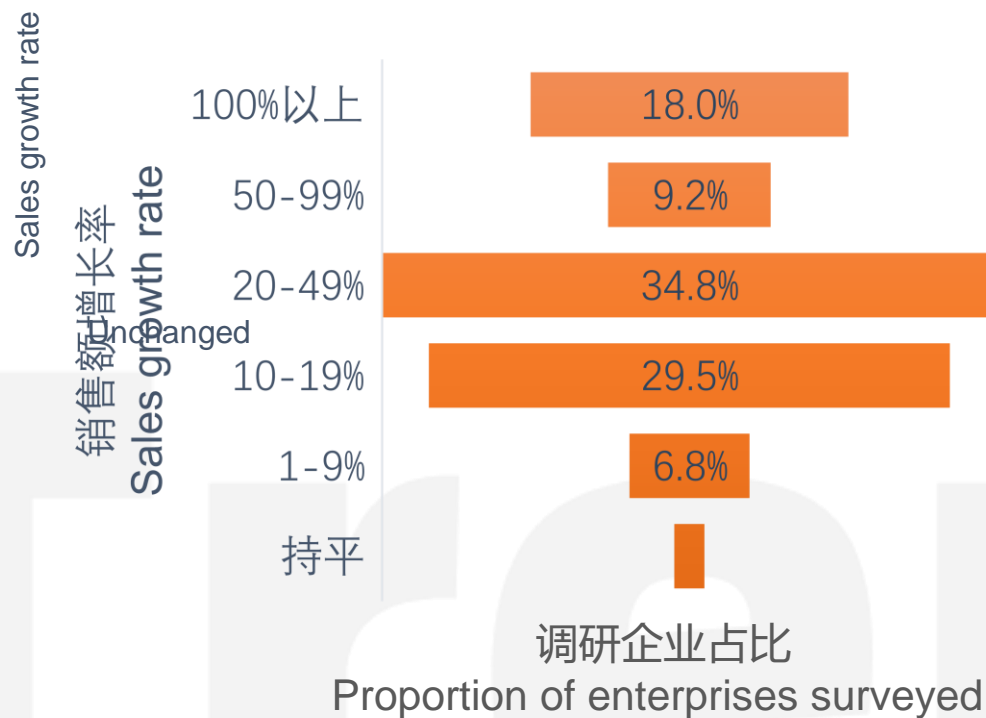
What changes will their partners make in the eyes of brand owners?

2021 品牌商计划做哪些改变?

What changes will brand owners make in 2021?

销售额目标

Sales target



如何实现目标?

Ways to realize the target?

- 54.5%** 推出新品牌或新产品
Launching new brands or new products
- 31.2%** 拓展新的销售渠道
Developing new sales channels
- 10.6%** 渠道下沉
Promoting the channel penetration into lower-tier markets
- 3.7%** 提高产品价格
Increasing the product price

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2021 品牌商计划做哪些改变?

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渠道变化

Changes in channels

- 36.4%** 增加线下渠道比例
Increase the proportion of offline channels
- 50%** 增加线上渠道比例
Increase the proportion of online channels
- 18.6%** 线上线下渠道比例保持不变
Keep the proportion of online and offline channels unchanged

重点开拓的渠道

Key channels for development

Pharmaceutical chain 医药连锁, 12.8%	Portal e-commerce 门户电商, 7.7%	Live-streaming sales 直播带货, 7.2%	Cross-border e-commerce 跨境电商, 6.2%	Supermarkets and convenience stores 商超便利 店, 5.6%	TV shopping 电视购物, 5.1%
Social e-commerce 社交电商, 8.7%	Medical institutions 医疗机构, 7.6%	Maternal and infant chain 母婴连 锁, 6.9%	Service for the aged 养老服务, 6.1%	Exclusive shops 专卖店, 4.9%	Department stores 百货 渠道, 3.4%
			Beauty salons/Health clubs 美容院/养 生会所, 5.8%	Conference marketing 会销, 3.9%	Culture and tourism 文化 旅
				Direct sales 直销, 4.3%	Gymnasiums 健身房,...

Innovation Makes the Future

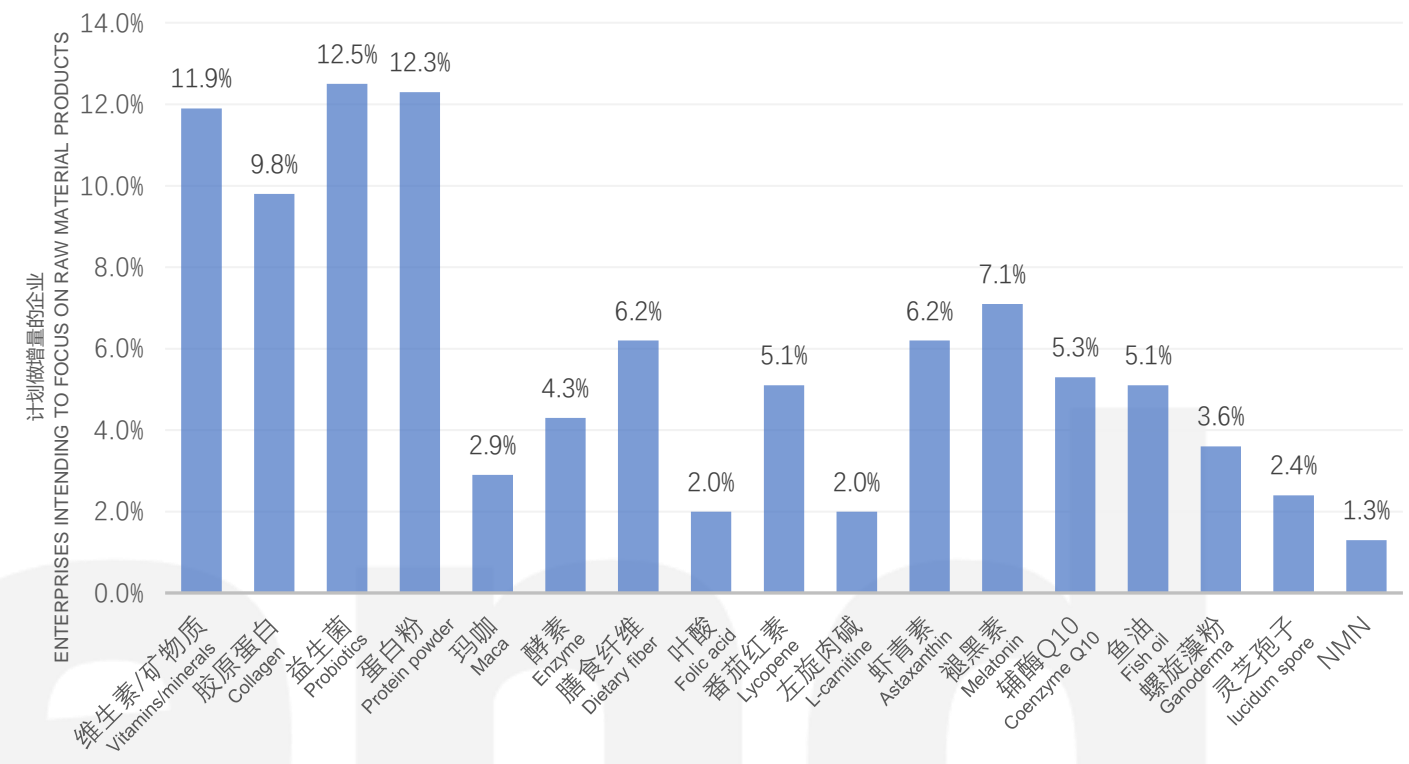
2021 品牌商计划做哪些改变?

What changes will brand owners make in 2021?

产品类别

Product category

计划加强哪一类原料类产品?
The category of raw material products to be strengthened



2021 品牌商计划做哪些改变?

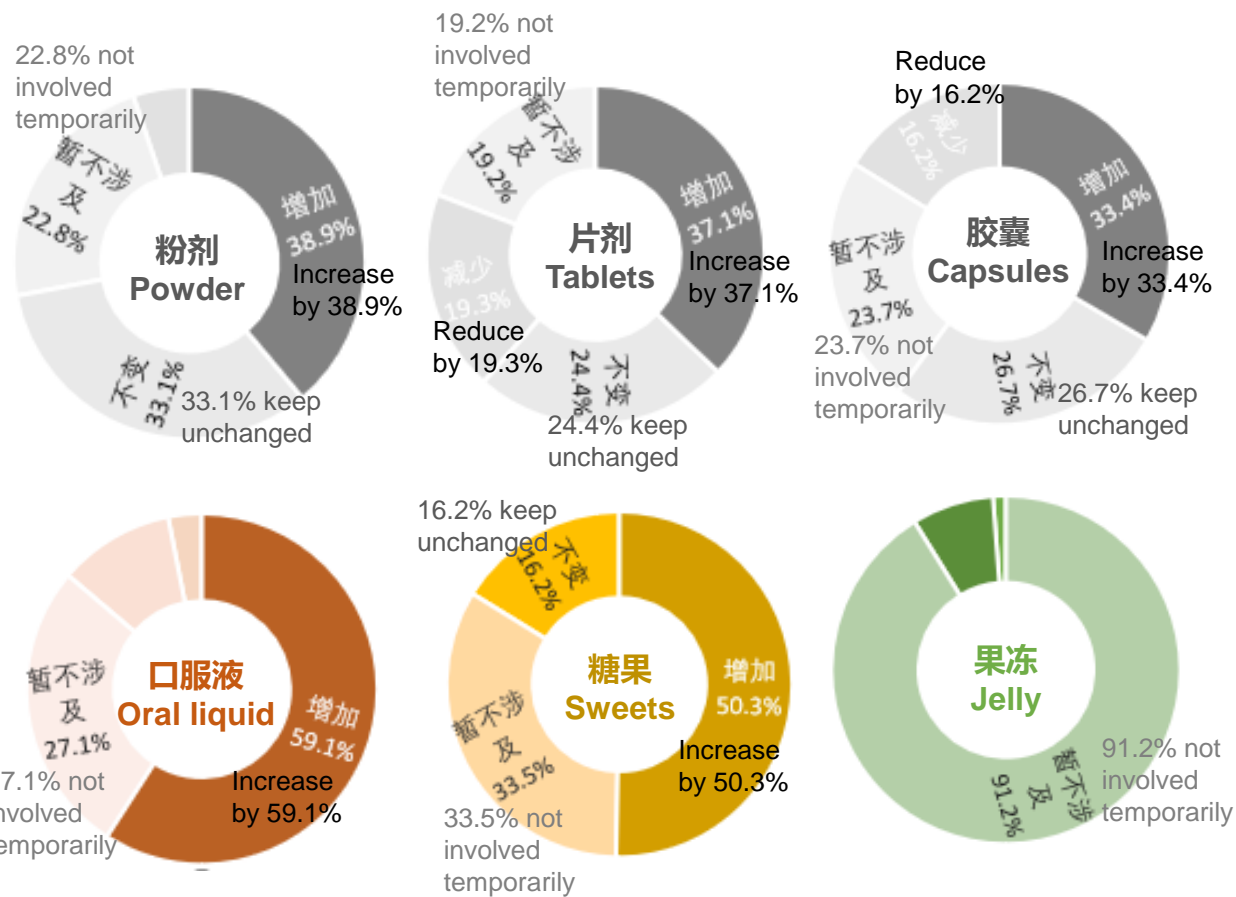
What changes will brand owners make in 2021?

-剂型-

Dosage forms



- ✓ 市场中占主导的剂型仍以粉剂、片剂、胶囊类为主，并逐渐向快消化的产品剂型倾斜。
- ✓ The dominant dosage forms in the market are still powder, tablets and capsules, and are gradually inclined to the dosages that are quickly digestible.
- ✓ 品牌更倾向于增加口服液、糖果类口感更好的剂型。零食形态的软糖剂型除维生素外拓展到多品类，深受消费者欢迎，保持高速稳健增长。
- ✓ Brand owners are more inclined to increase the oral liquid, sweets and other dosage forms that taste better. In addition to vitamins, the dosage form of soft sweets has been extended to many categories, and has been highly favored by consumers and maintained a high speed and steady growth.



Innovation Makes the Future

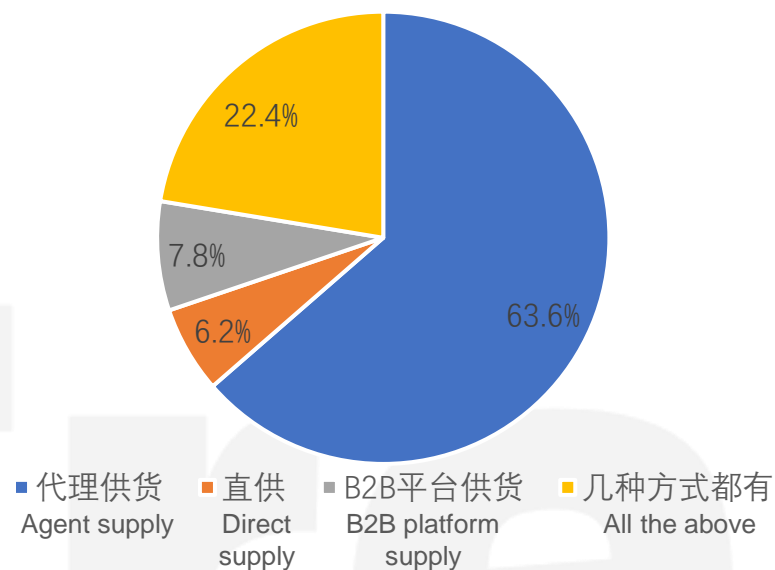
2021 品牌商计划做哪些改变?

What changes will brand owners make in 2021?

2020对药店/商超/百货的供货方式

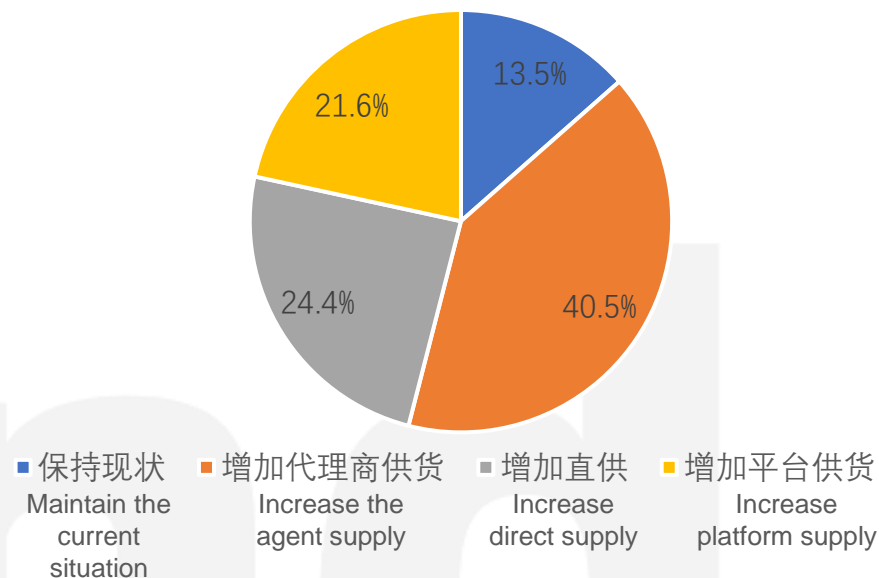
Modes of supply to drug

stores/supermarkets/department stores in 2020



2021-2022对供货方式的规划

Planning of supply modes between 2021 and 2022



2021 品牌商计划做哪些改变?

What changes will brand owners make in 2021?

品牌商眼中的自己?

How do brand owners see themselves?

1. 产品质量已得到品牌方的一致重视并作为最重点的核心竞争力提供有竞争力的价格
 2. 推出针对细分市场的产品和服务
 3. 推出个性化、场景化的新产品满足消费者需求
 4. 大单品策略
 5. 销售渠道多元化
 6. 推出更多跨界新品
 7. 产品同质化将带来更激烈的市场竞争
 8. 受监管政策影响将迎来更大挑战
1. They have paid high attention to the quality of products, seen it as the most important core competitiveness, and provided competitive prices
 2. Launch products and services oriented to the market segments
 3. Launch personalized and scenario-based new products to meet the needs of consumers
 4. Implement the strong item strategy
 5. Promote the diversification of sales channels
 6. Launch more cross-sector new products
 7. Product homogenization will lead to more fierce market competition
 8. There will be greater challenges due to the influence of regulatory policies

2021 品牌商眼中的代理商发展趋势? Development trend of agents in the eyes of brand owners in 2021

代理商 Agents

1. 会有更多专注细分领域的代理商
 2. 更倾向于选择有潜力可持续发展的品牌
 3. 发展线上线下一体化
 4. 营销精准化趋势进一步加强 (会员营销、社群营销、私域种草、直播带货等)
 5. 承担更多品牌推广责任, 向服务型转型, 加强和提高消费者体验和服务
 6. 寻求贴牌合作, 推出自有品牌
1. There will be more agents focusing on segments
 2. Agents will be more inclined to choose the brands with potential for sustainable development
 3. Agents will focus on online and offline integration
 4. The trend of precision marketing will be further strengthened (member marketing, community marketing, private domain promotion, live-streaming sales, etc.)
 5. Take more responsibility for brand promotion, make a shift to service companies, and strengthen and improve the experience and services of consumers
 6. Seek for OEM cooperation, and launch their own brands

Marketing

有关渠道商的N个事实 N facts about channels

2020	销售额 Sales volume	渠道分布 Distribution of channels	品牌数量 Number of brands	产品类别 Product category
2021	重点发展的品类 Key categories for development	全渠道布局 Omni-channel layout	新领域 New fields	

Trends

81.5%经销商代理商销售额保持增长 81.5% of distributors/agents maintained a sales growth

93.6% 的企业销售额保持持平或增长

93.6% of enterprises kept their sales volume unchanged or increased their sales volume

18% 的企业销售额增长在50%以上

18% of enterprises had a sales growth rate of 50% above

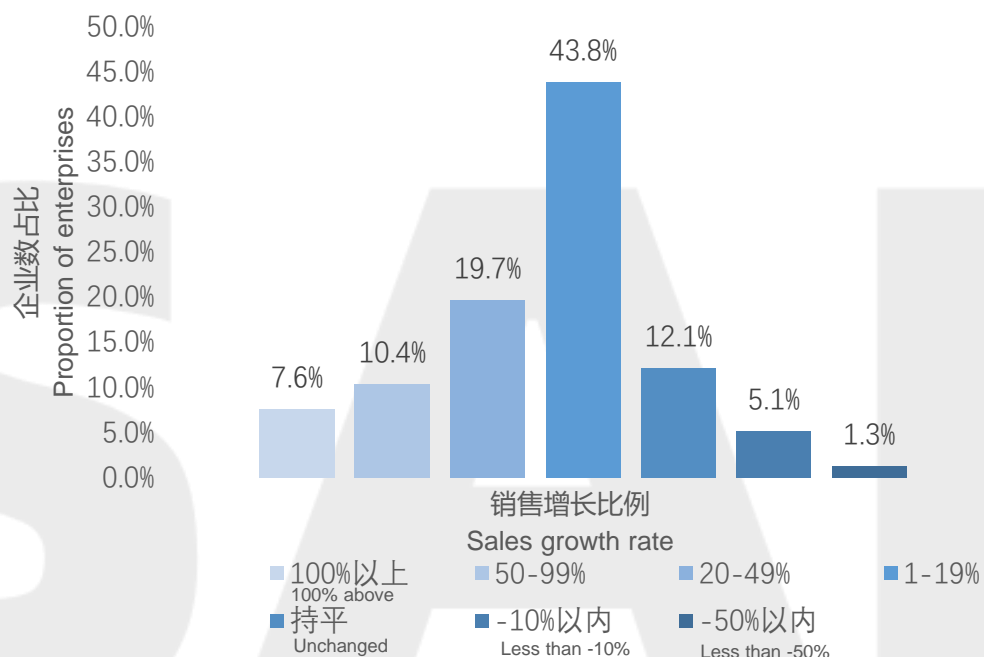
94.9% 的企业毛利额保持持平或增长

94.9% of enterprises kept their gross profits unchanged or increased their gross profits

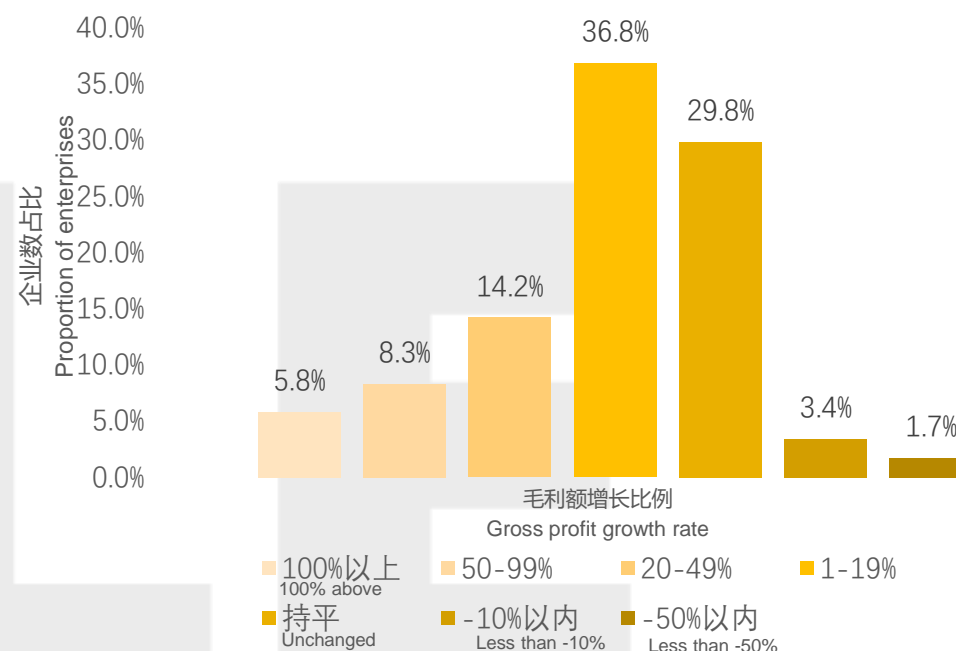
14.1% 的企业毛利额增长在50%以上

14.1% of enterprises had a growth rate of 50% above in gross profits

2020年企业销售额情况
 Sales volume of enterprises in 2020

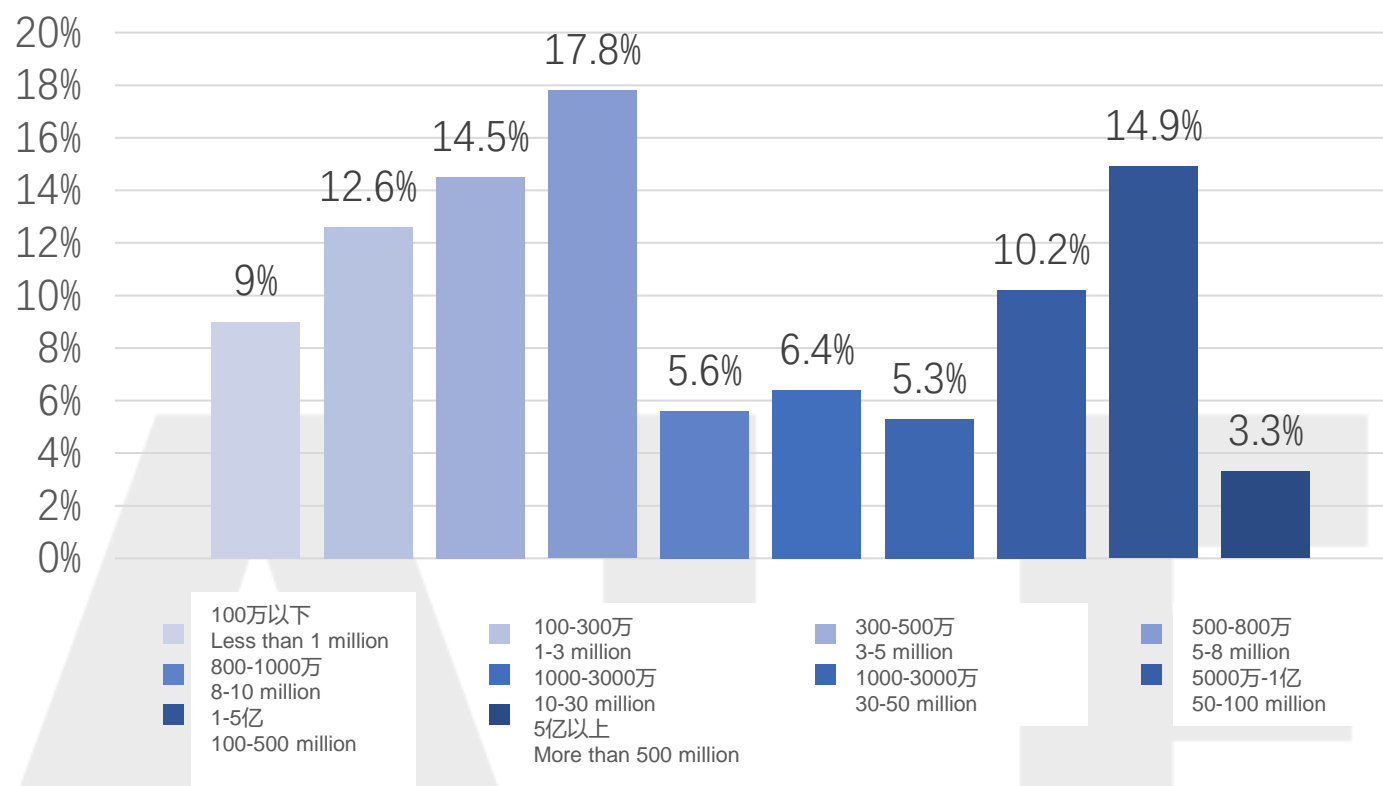


2020年企业毛利额情况
 Gross profits of enterprises in 2020



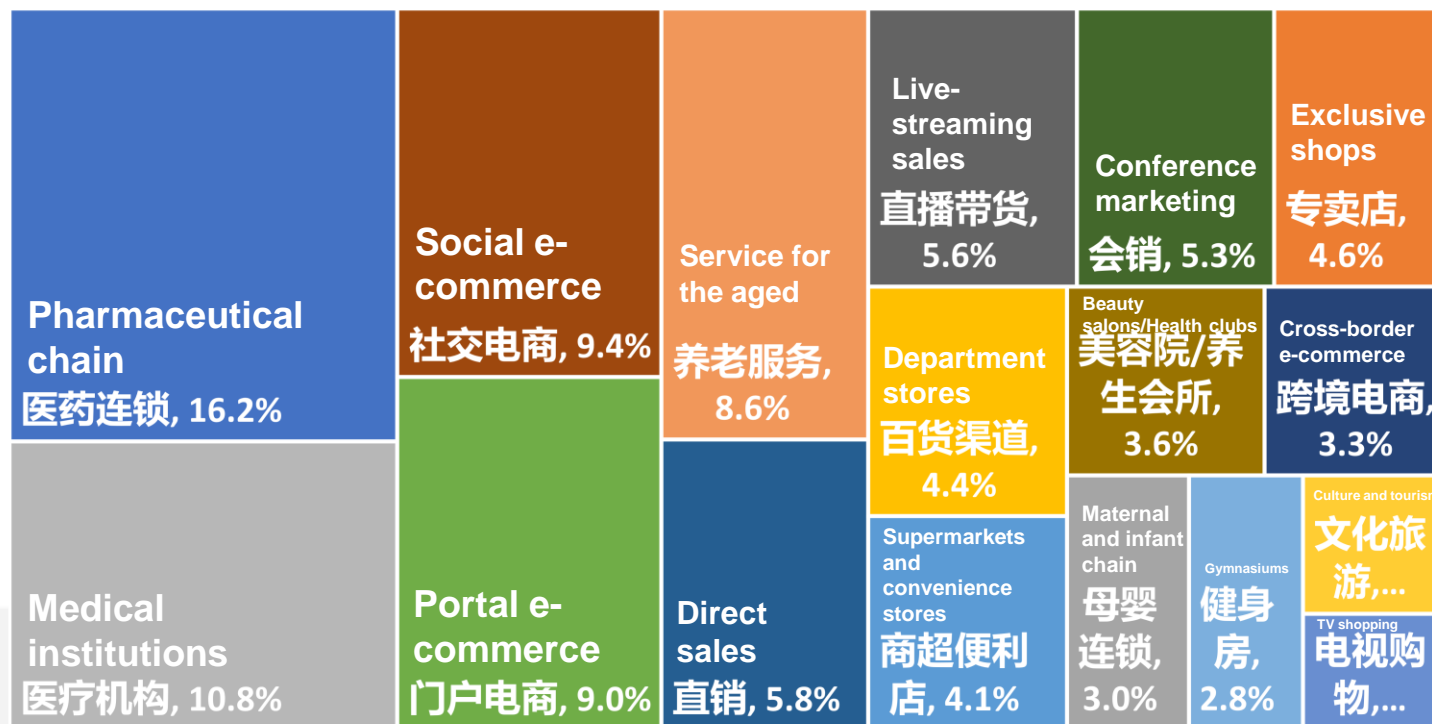
40.1%经销商代理商销售额保持在千万级以上

40.1% of distributors/agents maintained their sales volume of more than 10 million



2020 代理商主要服务什么渠道?

Main channels that agents serve in 2020



Marketing

2020年代理的品牌情况 Agent brands in 2020

相比2019年
Compared with 2019

37.3% 的代理商增加了品牌代理数量

41.1% 的代理商所代理的品牌数了保持不变

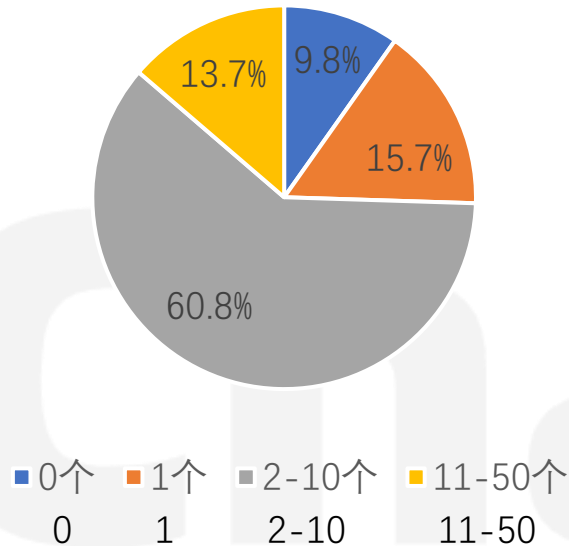
21.6% 的代理商在代理品牌数量不变的情况下调整品牌运营方向

37.3% of agents increased the number of agent brands

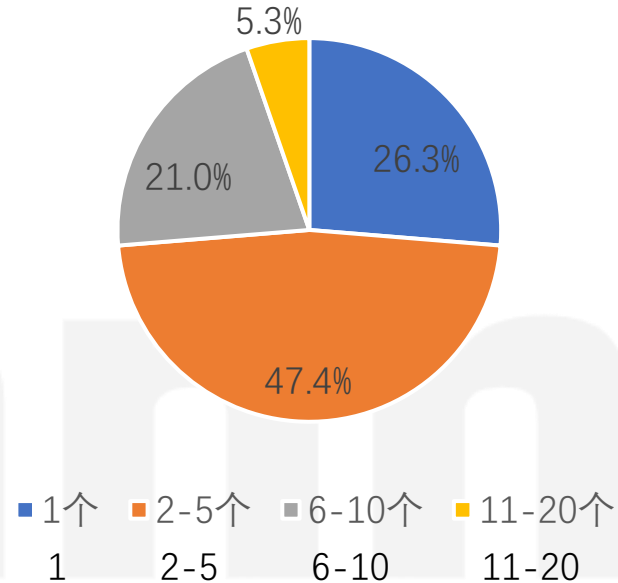
41.1% of agents maintained the number of their agent brands unchanged

21.6% of agents adjusted the direction of brand operation while maintaining the number of their agent brands unchanged

2020年所代理品牌的数量
Number of agent brands in 2020



相比2019年品牌增加数量
Increase in the number of brands compared with 2019

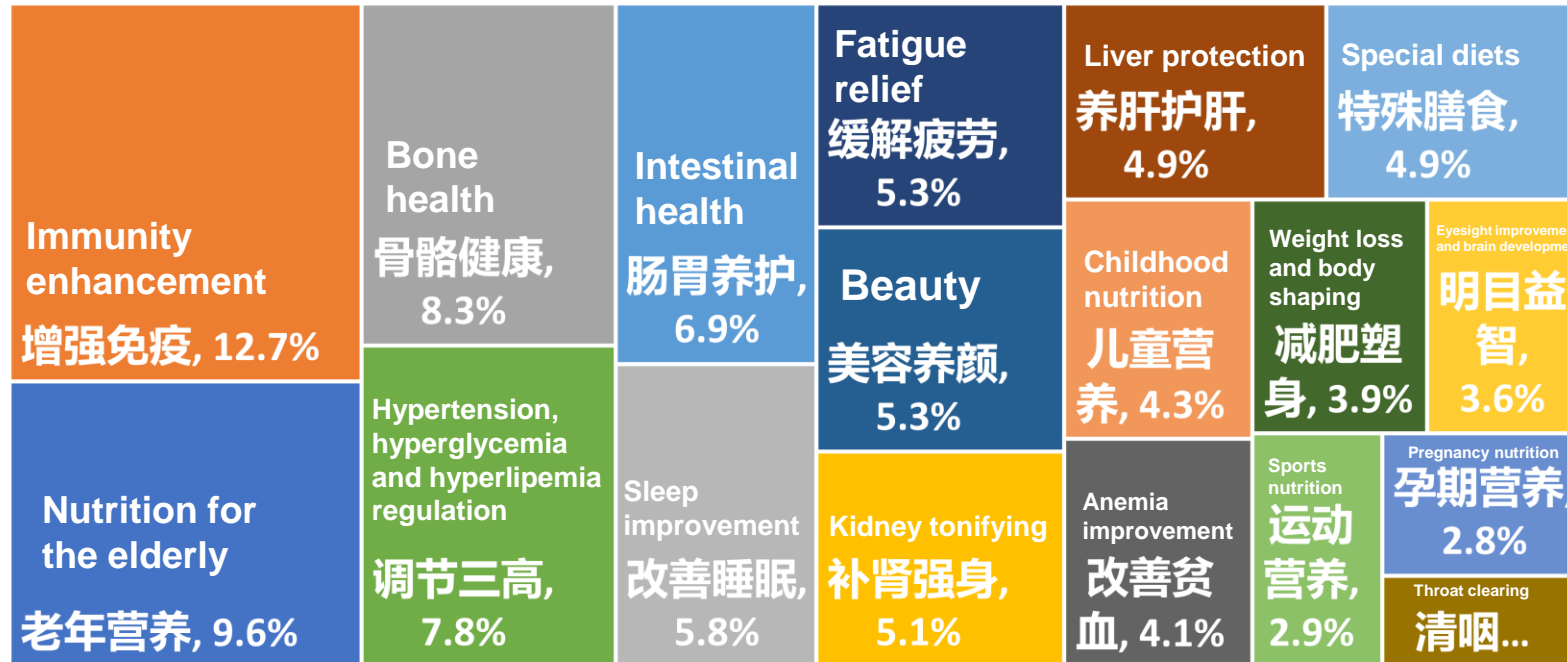


2020年代理的品牌情况

Agent brands in 2020

2020年所代理品牌的品类占比

Proportion of agent brand categories in 2020



- 增强免疫、中老年营养相关品类、以及肠道、睡眠、亚健康相关的品类占据半壁江山；
- 女性相关的口服美容、减肥塑身、孕期营养，以及儿童营养，男性相关的护肝类、运动营养等品类具备较大的发展空间。
- Immunity enhancement related products, nutrition and health care products for the middle-aged and elderly, and products related to intestinal health, sleep, sub-health improvement account for half of all products;
- Oral products for beauty, weight loss and pregnancy nutrition of females, childhood nutrition related products, and products related to liver protection and sports nutrition of males have a large space for development.

2021

代理商计划做哪些改变？

What changes will agents make in 2021?

代理商眼中的合作伙伴将发生怎样的变化？

What changes will their partners make in the eyes of agents?

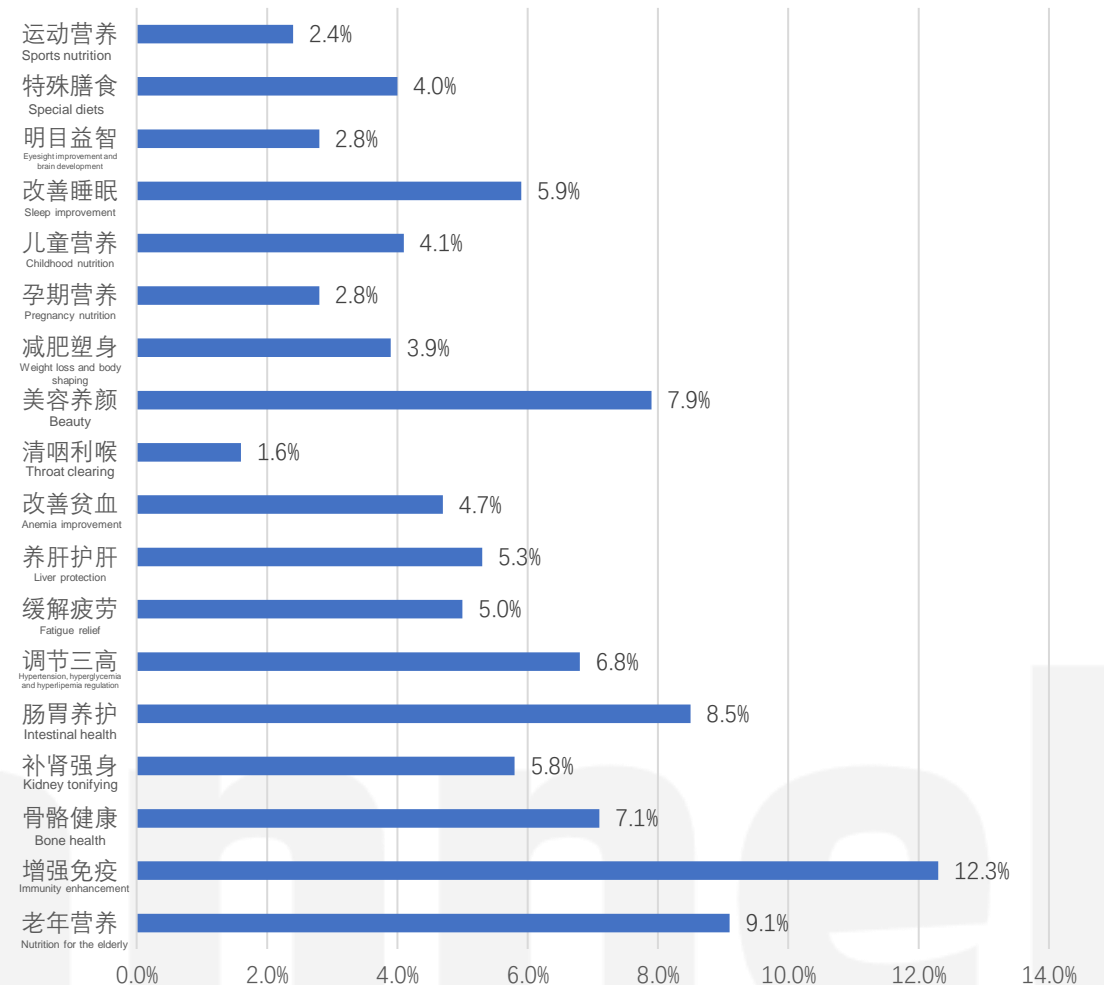
2021年代理商将发生哪些改变?

What changes will agents make in 2021?

产品类别 Product category

计划增加哪些类型的产品? Products to be increased

- 第一梯队：增强免疫、美容养颜、肠道健康、中老年营养相关品类；
- 第二梯队：骨骼健康、调节三高、改善睡眠、特定营养/精准营养类的产品；
- 第三梯队：缓解疲劳、改善贫血、儿童营养等品类。
- First category: products related to immunity enhancement, beauty, intestinal health and nutrition for the middle-aged and elderly;
- Second category: products related to bone health, hypertension, hyperglycemia and hyperlipemia regulation, sleep improvement, and specific nutrition/precision nutrition;
- Third category: products related to fatigue relief, anemia improvement, and childhood nutrition.



2021年代理商将发生哪些改变?

What changes will agents make in 2021?

未来的发展规划?

Future development planning

- 线上线下全渠道融合
- 更多投入线下, 线上更多元化,
- 扩展保健食品以外的产品: 健康食品/饮料
- Promote the integration of all channels, both online and offline
- Focus more on offline channels, and further diversify online channels
- Develop other products in addition to health-care food: healthy food/drinks



24.3% 开设直营零售店

24.3% of agents will run direct-sale stores

18.2% 开发自主品牌

18.2% will develop their own brands

16.6% 发展电商平台

(抖音 21% 快手 18% 淘宝 14% 拼多多 13% 京东 11% 全球购 11% 天猫 9% 小红书 9% 苏宁易购 4% 有赞 2%)

16.6% will develop e-commerce platforms

(TikTok 21% Kuaishou 18% Taobao 14% Pingduoduo 13% JD.com 11% Taobao Global 11% Tmall 9% Xiaohongshu 9% Suning.com 4% Youzan 2%)

10.1% 发展社交新零售如社区团购

10.1% will develop new social retail modes such as community group-buying

9.4% 代理营养保健食品以外的品类如健康食品和饮料

9.4% will be engaged in the agency service of the products in addition to nutrition and health-care products, such as healthy food and drinks

12% 发展营销服务 6.1% 发展文化传播 3.3% 其他

12% will develop marketing services 6.1% will be engaged in cultural communication

3.3% will do other things



中国国际健康营养博览会
China International Natural Health & Nutrition Expo

Trends

未来市场趋势 Future Market Trend

未来市场趋势 Future market trend

营养新国潮市场：老字号滋补品牌掀起“营养”新国风

New national trend of nutrition brands in the market: time-honored nutrition brands set off a new consumption trend of “nutrition”

- 传统滋补品牌在营养“新国潮”的带动下，将老字号品牌与现代流行风尚相结合，收获了更多Z世代年轻消费者、白领女性的青睐。
- 营养新国潮亦是传统中医药品牌扩展边界的不二之选。
- Under the new national trend of nutrition brands, the time-honored nutrition brands have been favored by more Generation-Z young consumers and office ladies by combining time-honored brands with modern fashion.
- The new national trend of nutrition is also the only choice for traditional Chinese medicine brands to expand the boundary.

老字号品牌案例 Case of time-honored brands



老字号品牌“东阿阿胶”今年重磅发布“健康小金条”东阿阿胶粉。以国潮形象设计融合新品发布，引发年轻群体关注。

Dong-E-E-Jiao, a time-honored brand, launched its donkey-hide gelatin powder "Healthy Gold Bar" this year. This new product shows its image in the style of national trend, drawing high attention from young people.



中国中药：打造新一代随身滋补膏方选料和科技的融合，给您殿堂级中古膏方新养生
 Sino-TCM: The fusion of selected materials and technology, the new Chinese - style tonic products with paste formula

未来市场趋势

Future market trend

银发经济市场不断扩大

Constant growth of silver economic market

- 根据人口普查统计，到2030年中国老年人口的总量将达到4亿，相当于美国人口的总量2倍；
- 中老年健康营养市场将迎来产业发展的高峰；
- 营养健康产品领域：**延缓衰老、改善骨骼健康、有益大脑、改善睡眠、免提高疫力**成为国民关注的热点；
- 定位为**精准营养**的产品、定制化的**营养餐**产品未来逐渐展现发展向好势头。
- According to census statistics, the total number of elderly people in China will reach 400 million by 2030, twice the total population of the United States;
- The middle-aged and elderly health and nutrition market will usher in the peak of industrial development;
- The field of nutrition and health products, such as the products for delaying senility, improving bone health, benefiting brain, improving sleep and enhancing immunity has become the focus of national attention;
- Precision nutrition products and customized nutritious food will gradually show a good momentum of development in the future.

未来市场趋势 Future market trend

个性化产品优势凸显

Prominent advantages of personalized and customized products

- 据投资银行数据，2040年市场规模可达4480亿RMB；
- 目前仍处于早期阶段，仅局限于通过问卷调查形式，提供适合不同消费者群体符合各自营养需求的产品；
- 进一步的定制化：需要采集消费者血样，定制身体所需营养产品；
- 终极定制：基因检测，进一步会同时利好生物技术和营养食品产业。
- According to the data of the investment bank, the market size will reach RMB 448 billion by 2040;
- At present, it is still in the early stage. It is only possible to provide products which are suitable for different consumer groups and meet their respective nutritional needs through questionnaire survey;
- Further customization: Blood samples need to be collected from consumers to customize the nutritional products suitable for them;
- Ultimate customization: genetic testing will further benefit both biotechnology and nutritional food industry.

懂你心意 更懂你



女王定制每日所需营养
自由搭配 5分钟为你量身定制

LemonBox定制营养包

点击开始定制GO >

三步定制
STEP BY STEP

STEP 1
填写健康问卷，告诉我们你的健康目标、饮食习惯和身体状况。

STEP 2
获取定制的每日营养补充推荐配方，以及健康生活建议。

STEP 3
获得从美国生产的定制每日维生素补充包。

FANCL
Health Science

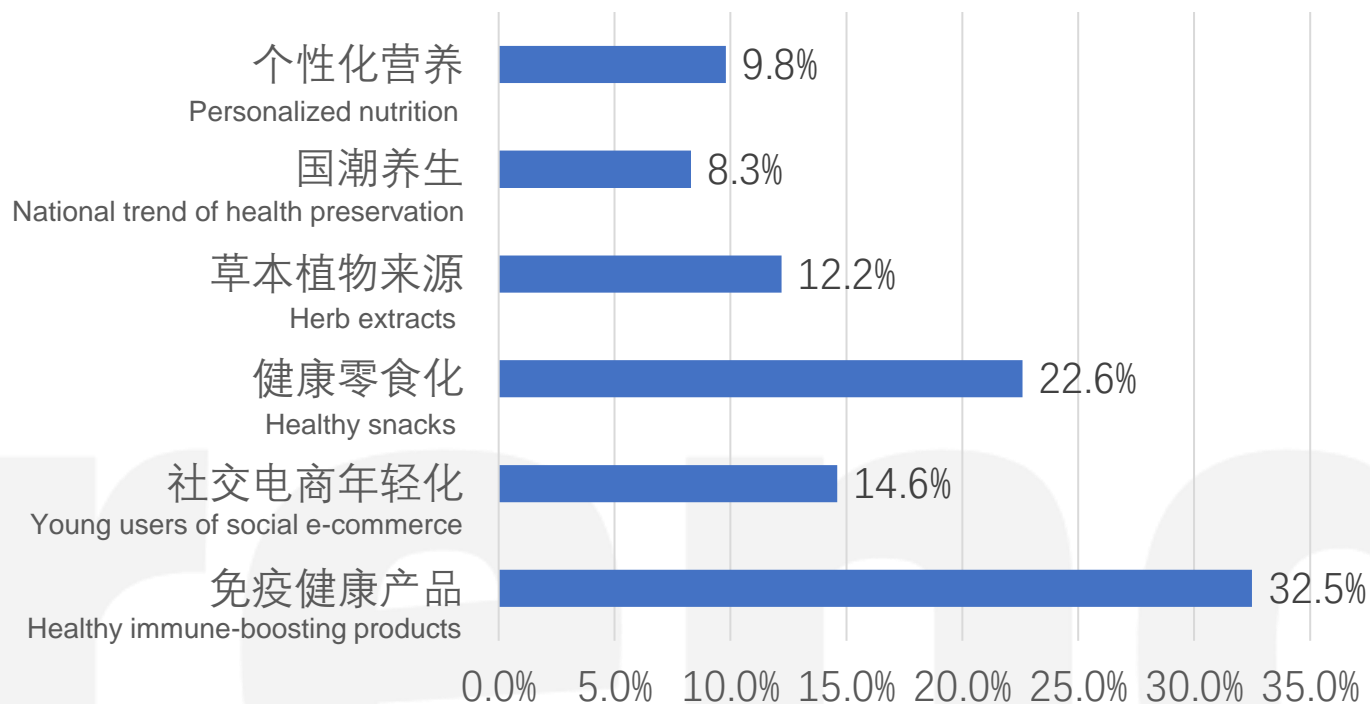


未来市场趋势

Future market trend

全球健康营养品牌关注的未来趋势

Future development trend of global health and nutrition brands



未来行业关键词星瞻

Key words of future industry

产品Products

- # 维生素/矿物质、益生菌、蛋白粉类
- # Vitamins/minerals, probiotics, protein powder
- # 辅酶Q10, 褪黑素、鱼油、破壁灵芝孢子粉
- # Coenzyme Q10, melatonin, fish oil, shell-broken ganoderma lucidum spore powder
- # 增强免疫、美容养颜、肠道健康、中老年营养类产品
- # Products related to immunity enhancement, beauty, intestinal health and nutrition for the middle-aged and elderly
- # 增加口服液、糖果类口感更好的剂型, 更具备科技含量的剂型如“晶球”
- # Increase oral liquid, sweets and other dosage forms that taste better and involve advanced science and technology, such as “crystal ball”

渠道Channels

- # 55%的品牌商希望保持或增加线下比
- # 55% of brand owners hope that the proportion of offline channels can be maintained or increase
- # 品牌方供货方式仍然以代理商模式为主
- # The supply method of brand owners is still based on the agent mode
- # 代理商更多投入线下, 线上更多元化
- # Agents pay more attention to offline channels and further diversify online channels
- # 代理商扩展保健食品以外的产品: 健康食品/饮料
- # Agents develop other products in addition to health-care food, such as healthy food/drinks

市场Market

- # 营养新国潮全球瞩目
- # The new national trend of nutrition brands catching the world's attention
- # 个性定制化产品优势凸显
- # Prominent advantages of personalized and customized products
- # 银发经济市场不断扩大
- # Constant growth of silver economic market
- # 营销精准化趋势进一步加强
- # Further strengthening of the precision marketing trend

以爆款引爆产品

2015年, Doctor's Best来到中国, 致力于为中国消费者提供科学的膳食营养补充搭配方案。目前旗下已拥有心脑血管及三高系列、骨关节系列、眼部健康系列、女性系列、男性系列、消化系统系列、基础营养系列等多个产品系列及300多款明星产品, 深受中国消费者喜爱。

Doctor's Best came to China in 2015 and was committed to providing scientific dietary supplement matching solutions to Chinese consumers. At present, more than 300 products cover many series, including cardiovascular, eye health, bone joint, digestive system, basic nutrition and so on. These products are popular in Chinese consumers.

心脑血管健康系列

Cardiovascular Health Series

Q10 Coenzyme Q10
高含量鱼油 Fish Oil
纳豆激酶 Nattokinase
银杏精华 Ginkgo Essence

口服美容系列

Oral Beauty Series

胶原蛋白片 Collagen tablets
虾青素, 神经酰胺胶囊 Astaxanthin
Ceramide capsules

骨关节系列

Bone Joint Series

氨糖系列 Glucosamine
复合钙系列 Complex calcium



Science-Based Nutrition
科学营养实力派



美味软糖系列

Gummies Series

Lutein & Zeaxanthin Gummies 叶黄素软糖
Melatonin Gummies 褪黑素软糖
Coenzyme Q10 Gummies 辅酶Q10软糖

眼部健康系列

Eye Health Series

Lutein & Zeaxanthin Gummies 叶黄素软胶囊

综合营养系列

Comprehensive Nutrition Series

Gastrointestinal conditioning 肠胃调理系列
Sleep 睡眠系列
Brain 健脑系列



中国国际健康营养博览会

China International Natural Health & Nutrition Expo

感谢聆听!

Thank you for your attention!



SHANGHAI

