

China Dietary Supplement Market Overview

中国膳食补充剂市场分析



Probiotic and Omega-3 Industry Summit

Jeff Crowther – Executive Director (USCHPA)

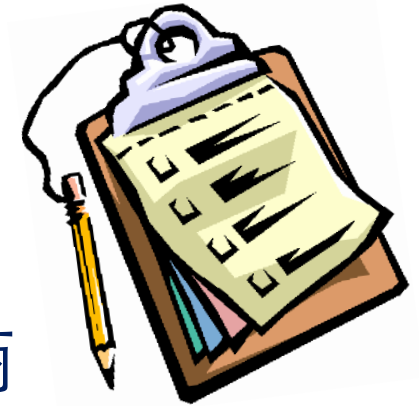
益生菌和 Omega-3 行业峰会

美中健康产品协会执行总裁——杰富礼

China: Dietary Supplement Market Overview

中国膳食补充剂市场分析

- **Regulatory** 法规环境
- **Sales Channels** 销售渠道
- **Cross Border E-Commerce** 跨境电商
- **Introduction to USCHPA** 协会介绍



Regulatory

法规环境



China's 12th Five Year Plan (2011-2015)

中国“十二五规划” (2011-2015)

For the first time ever, China specifically made the health food industry part of their long term plans. Areas of Focus:

中国首次将健康产品产业列入长期发展规划之中。“十二五”规划重点领域:

1. **R&D of new food ingredient** 研发新食品原料
2. **Improve quality** 提高质量
3. **Promote development** 促进发展
4. **Increase consumption for special needs groups pregnancy, children, elderly, athletes, soldiers etc.** 增加特殊人群消费，如孕妇、儿童、老年人、运动员、军人等人员的消费
5. **Incorporate TCM – botanicals** 将中医和植物研究相结合
6. **Encourage growth of high tech larger firms** 鼓励高科技大企业的成长
7. **By 2015 nutrition and health foods should hit \$159 billion with an annual growth rate of 20%** 2015年营养和健康产品年增长率提至20%，销售总额达1610亿美元
8. **Top 100 firms control 50% of the market** 一百强企业控制市场份额达50%

Dietary Supplement Import Approvals

膳食补充剂市场准入

Official Path: Registering products with China's Food and Drug Administration (CFDA) as "Healthy Food".

官方途径：通过国家食品药品监督管理总局进行“保健品”注册

Gray Path: Approval from Administration of Quality Supervision Inspection and Quarantine (AQSIQ) as "Food". This Ended January 2014

边缘途径：通过国家质检总局以“食品”名义进口，此方法于2014年1月叫停。



CFDA Regulatory Process

食药监局注册流程



- **CFDA's health food registration has 27 allowable claims** 食药监局规定**27**种保健食品功能声称
- **One product can have up to three claims** 每个品最多进行**3**个功能声称
- **Claims require extensive testing including human and animal trials** 进行功能声称的产品需要进行人体和动物实验

CFDA New Approved Claims

1. Improve immune system (AT)
2. Improve Sleep (HAT)
3. Relieve physical fatigue (HAT)
4. Enhance oxygen deficient endurance (AT)
- 5. Help protect against radioactive matters (AT)**
6. Increase bone density (AT)
7. Protect liver against chemical damage (AT)
8. Relieve eye fatigue (HT)
- 9. Eliminate acne (HAT)**
- 10. Eliminate chloasma (HAT)**
- 11. Improve moisture of the skin (HT)**
- 12. Improve oil content of the skin (HT)**
13. Weight loss (HAT)
14. Help in lowering blood glucose (HAT)
- 15. Improve growth and development (HAT)**
16. Anti-oxidation (HAT)
17. Improve nutritional anemia (HAT)
18. Help in memory improvement (HAT)
- 19. Adjust intestinal flora (HAT)**
20. Promote lead excretion (HAT)
- 21. Promote digestion (HAT)**
22. Clear the throat (HAT)
- 23. Protect gastric mucosa (HAT)**
24. Promote lactation (HAT)
- 25. Promote Fecal Excretion (HAT)**
- 26. Help in lowering blood pressure (HAT)**
27. Help in lowering blood lipid (HAT)

Cancelled

Combined

Combined

HT = Human Testing

AT = Animal Testing

HAT = Human and Animal Testing

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CFDA: 27项申报保健功能或将减为18个

1. 增强免疫力功能(AT)
2. 改善睡眠功能 (HAT)
3. 缓解体力疲劳功能(HAT)
4. 提高缺氧耐受力功能 (AT)
5. 对辐射危害有辅助保护功能 (AT)
6. 增加骨密度功能 (AT)
7. 对化学性肝损伤有辅助保护功能(AT)
8. 缓解视力疲劳功能 (HT)
9. 祛除痤疮功能 (HAT)
10. 祛除黄褐斑功能 (HAT)
11. 改善肌肤水分功能(HT)
12. 改善皮肤油份功能 (HT)
13. 减肥功能 (HAT)
14. 辅助降血糖功能(HAT)
15. 改善生长发育功能 (HAT)
16. 抗氧化功能 (HAT)
17. 改善营养性贫血功能 (HAT)
18. 辅助改善记忆功能(HAT)
19. 调节肠道菌群功能 (HAT)
20. 促进排铅功能 (HAT)
21. 促进消化功能 (HAT)
22. 清咽功能(HAT)
23. 对胃粘膜损伤有辅助保护功能 (HAT)
24. 促进泌乳功能(HAT)
25. 通便功能(HAT)
26. 辅助降血压功能 (HAT)
27. 辅助降血脂功能(HAT)

取消

HT = 临床试验

合一

AT = 动物实验

合一

HAT = 临床实验和动物实验

CFDA's "Blue Hat" Registration for Health Food

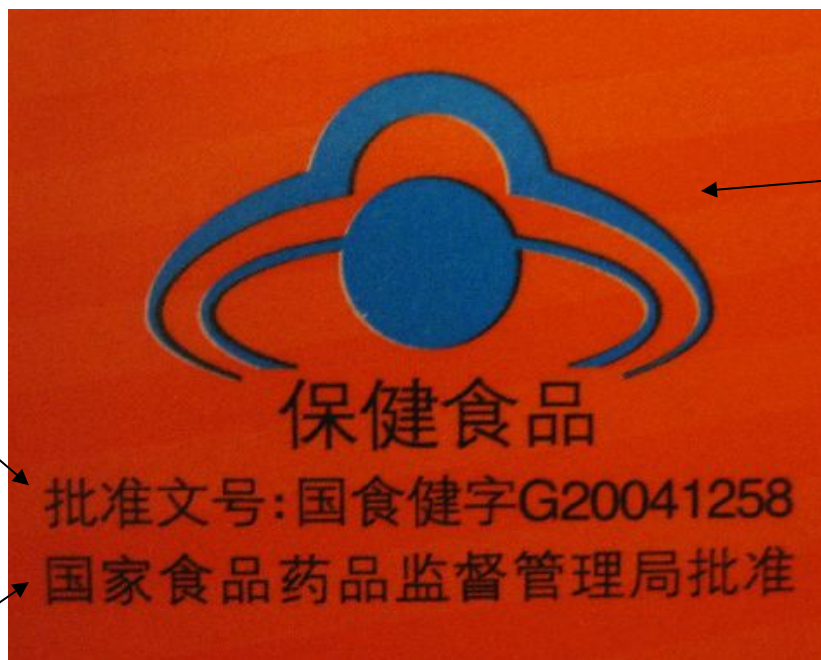
国家食药监局“蓝帽子”保健食品注册

This is the year it was approved and its corresponding certificate number.

"G" indicates it is a domestic product

批准文号是指该产品是哪年通过注册，G是指这是国产品牌。

This means China Food and Drug Administration (CFDA). 这是国家食药监局批准的官方标识。



This is the CFDA Functional product logo with Chinese statement which means health food product. 蓝帽子形状标识代表该产品获得“保健食品”批准。



Registration Costs

注册成本

- **Need to hire registration consultant** 建议通过咨询公司进行办理
- **Registration fee in excess of \$100,000 per SKU** 每个品的注册费用大概需要10万美金
- **2-3 years waiting period** 等待2-3年

Regulatory 法规环境



Blue Hat Registration Costs: “蓝帽子”注册项目费用一览

Item	Fee (¥)	Fee (\$)
Agent Fees 咨询费	¥350,000	\$56,452
Toxicology test 毒理性测试	¥70,000	\$11,290
Function appraisal test (animal) 动物实验	¥80,000	\$12,903
Function appraisal test (human) 人体试验	¥200,000	\$32,258
Hygienically and stability test 卫生和稳定性试验	¥60,000	\$9,677
Efficacy composition evaluation 功效成分评估	¥30,000	\$4,839
Stimulant / banned substance test 兴奋剂/禁用物质检测	¥10,000	\$1,613
Microbial identification 微生物检测	¥15,000	\$2,419
Microbial toxicity evaluation 微生物毒性检测	¥15,000	\$2,419
Review inspection 评定审查	¥50,000	\$8,065
TOTAL 费用总计	¥880,000	\$141,935

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History of CFDA Registrations 1996 – 2014

1996-2014年
“保健食品”获准数量统计



Year	Domestic	Foreign	Total
2014	941	10	951
2013	946	11	957
2012	691	11	702
2011	767	13	780
2010	751	21	772
2009	568	25	593
2008	596	36	632
2007	377	10	387
2006	751	17	768
2005	943	29	972
2004	1531	54	1585
2003	603	50	653
2002	882	52	934
2001	491	47	538
2000	779	74	853
1999	689	91	780
1998	742	77	819
1997	1003	106	1109
1996	55	2	57

The first year that registration administration was transferred from the Ministry of Health to the State Food and Drug Administration



CFDA 国家食品药品监督管理总局
China Food and Drug Administration

NEW Draft Regulations for Nutritional Supplements *Released November 5, 2014*

2014年11月5日发布营养素补充剂新规（征求意见稿）

Administrative Regulations for Nutritional Supplements

营养素补充剂管理规定(征求意见稿)

Information Requirement for Nutritional Supplements DRAFT

营养素补充剂资料要求(征求意见稿)

**Discarded and rewritten to be included in the Overall Food Safety Law
新规在新《食品安全法》中有所体现**

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USCHPA had a meeting with CFDA on June 1, 2015 to discuss the NEW Draft Regulations for Health Food

2015年6月1日，美中健康产品协会与食药监局组织了会面，
并就新《食品安全法》关于保健食品的部分进行讨论。

- **Health Food will become part of the Food Safety Law under health food ingredient catalog system, which will be released for comment by CFDA soon.** 保健食品将会列于“保健食品原料目录系统”的一部分进行管理，该规定将很快进行发布并征求意见。
- **Foreign companies need to provide CFDA with approvals from home country. U.S. should be able to use “Free Sale Certificate”** 进口产品应向食药监局提供进口国生产批准文书。美国产品应提供本国颁发的“自由销售证明”。
- **Blue Hat registration process will continue. Companies wishing to sell products made from ingredients that are already in approved blue hat products can do so on a recording “notification” basis.** 保健食品审批制不会被完全取消。备案制仅适用于以被批准的保健食品原料为成分的产品。



- **However, these products may not be able to use the blue hat logo. CFDA is considering creating a new label for “recorded” products.**
通过备案制上市销售的产品不可以使用蓝帽子标识。国家食药监局或将发放新统一标识以用于区分备案产品。
- **CFDA and National Health Commission will be working to create a list of approved ingredients for health products.**
国家食药监局和国家卫计委将共同出台可用于保健食品批准原料名录。
- **This list will be separate from TCM herbal list and New Raw Food Material list**
该名录将区别于中药原料名录和新食品原料名录
- **CFDA is considering restructuring the 27 health claims, but not certain at this point** 国家食药监局将重新制定27项保健食品功能声称，但目前仍不确定。



CFDA 国家食品药品监督管理总局
China Food and Drug Administration

- **Companies must manufacture according to China GMP standards. Asked if CFDA will require foreign companies to follow China GMP standard and they said, “they are currently doing inspection at overseas pharmaceutical and medical device facilities and will not rule out the possibility of the same inspections for health products.**

保健食品企业在生产过程中必须遵循中国GMP标准。关于海外企业是否必须遵循该标准，食药监局回应“他们目前正在就国外的药品生产流程和生产设备进行考察，但是并不排除进口保健食品使用同一套中国 GMP 标准的可能性。”

- **However at this point, foreign companies would just need to provide their GMP standards** 但是，在未决定之前，海外企业只需严格遵守本国 GMP 标准即可。

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Sales Channels

销售渠道

Sales Channels 销售渠道



Will New Regulations Officially Open Traditional Channels?
新规的实行会打开传统销售渠道吗？

- **High-end Supermarkets**
高端进口超市
- **Shopping Mall Kiosks**
商场销售区
- **Health and Beauty Store**
日化和健康产品专营店



Watson's 屈臣氏
Mannings 万宁

- **Pharmacies** 药店
- **Direct Sales** 直销
- **E-Commerce** 电商



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“Western Firms Caught Off Guard as Chinese Shoppers Flock to Web”

中国电商市场一路高歌 西方零售巨头大跌眼镜

Wall Street Journal - June 14, 2015 华盛顿邮报

“China’s e-commerce market grew 49% last year—after gains in the prior three years of 59%, 51%, and 70%, respectively. In 2013, China overtook the U.S. as the world’s biggest e-commerce market, and last year the country rang up \$453 billion in sales online, 11% of all retail sales.” 去年中国的电商市场销售额增长了49个百分点，在2014年的前三年，其增量率分别是59%，51%和70%。2013年，中国成功超越美国，成为世界最大的电商消费市场。中国2014年的电商销售总额达到4530亿美元，占据零售市场总销售额的11%。

As stated in the article many global consumer goods giants underestimated e-commerce and as a result overstocked brick and mortars resulting in declining sales and expired products. 文章中提到，许多全球零售巨头低估了电商的威力，而导致其存货过多、商品过期，吃尽苦头。

文章来源 Source:

<http://www.wsj.com/articles/western-firms-caught-off-guard-as-chinese-shoppers-flock-to-web-1434274202>

Sales Channels 销售渠道



**China E-Commerce
Fastest Growing
中国电商急剧增长**

**648 million shoppers
6.48亿在线顾客**

**\$453 billion
4530亿销售额**

淘宝网
Taobao.com

天猫 Tmall.com

1号店 The Store
 **JD.COM** 京东

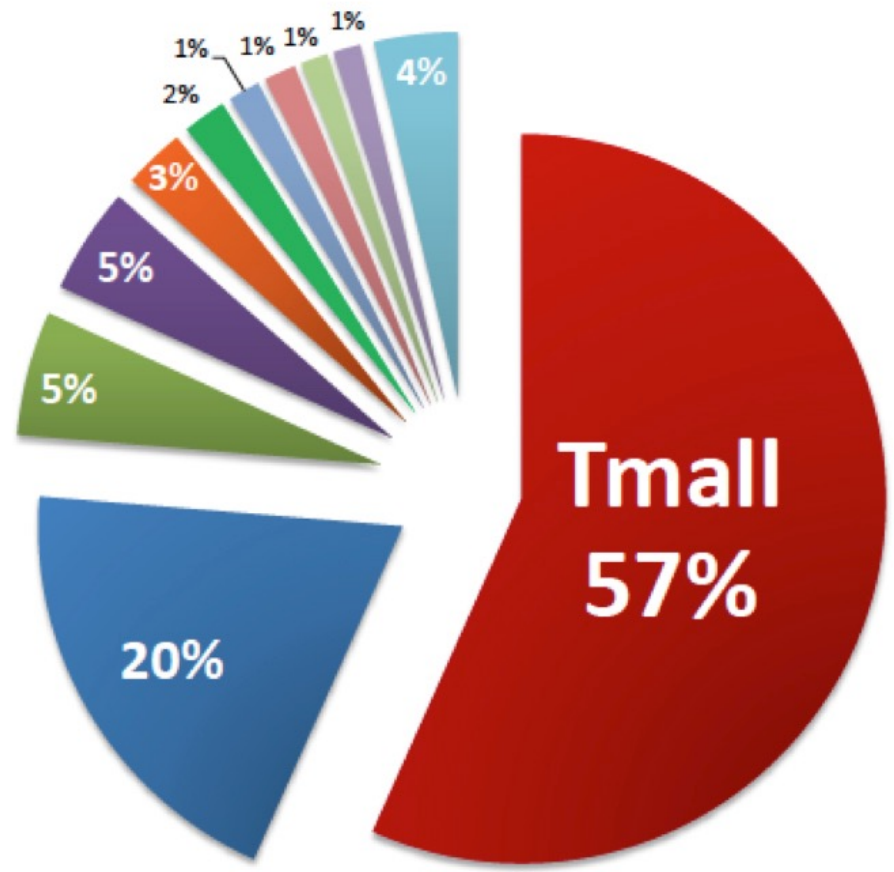
亚马逊
amazon.cn

易迅 51buy.com
QQ网购数码电器城
易迅网

当当网
dangdang.com


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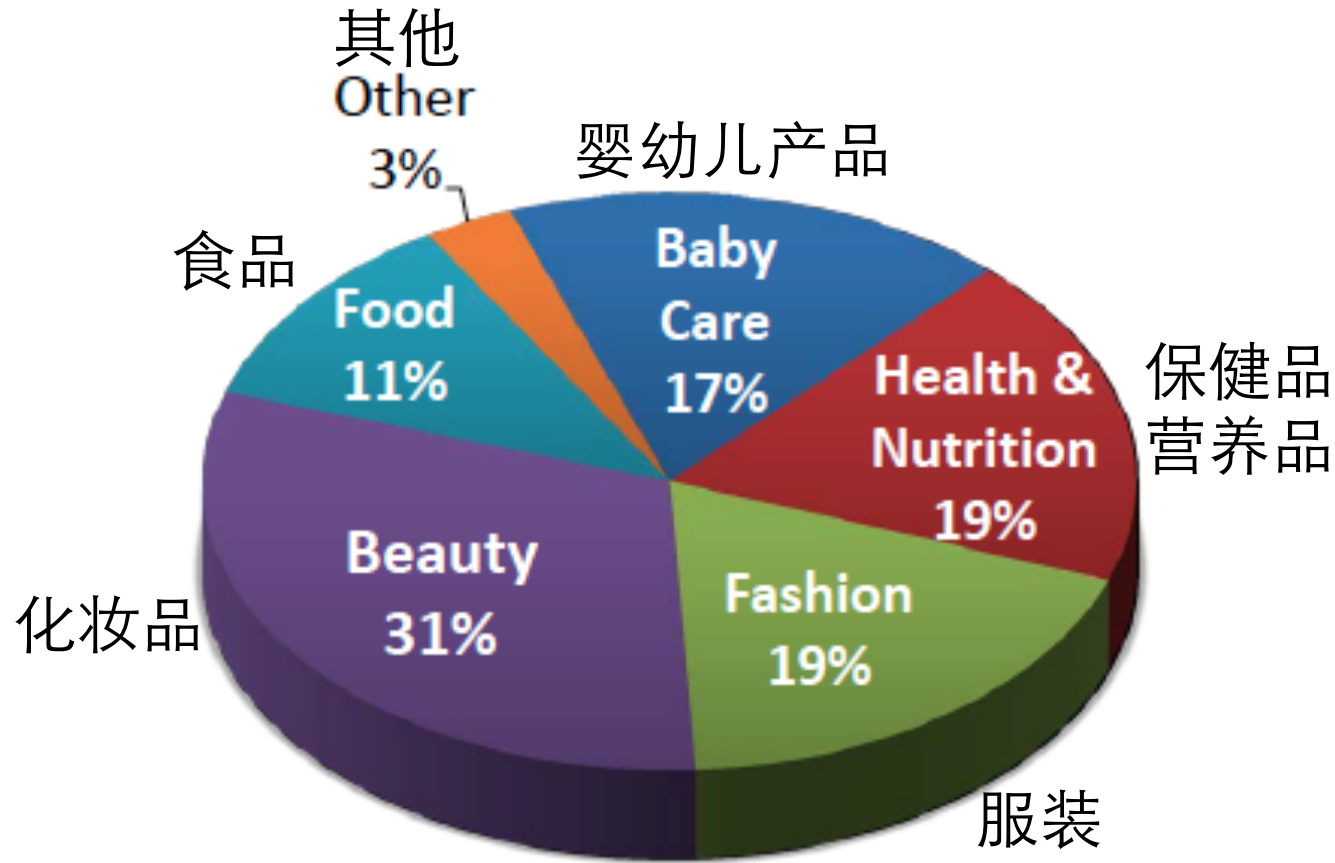
Sales Channels 销售渠道



- Tmall 天猫
- 360buy 京东商城
- Suning 苏宁易购
- Tencent B2C 腾讯
- Amazon.cn 亚马逊
- Dangdang 当当网
- Gomei 国美在线
- Vipshop 唯品会
- Yihaodian 一号店
- Vancl 凡客
- Others 其他

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Sales Channels 销售渠道



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Sales Channels 销售渠道



- **Alibaba has 350 million annual active buyers** 淘宝有3.50亿个全年活跃的用户
- **Has more than 1,800 distribution centers** 1800个集散中心
- **30 million packages a day** 每天发送3千万个包裹
- **Singles Day 2014 processed 278 million packages** 2014双十一期间发送2.78亿个包裹
- **NOT THE RIGHT FIT FOR EVERYONE**

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Cross Border E-commerce

跨境电商

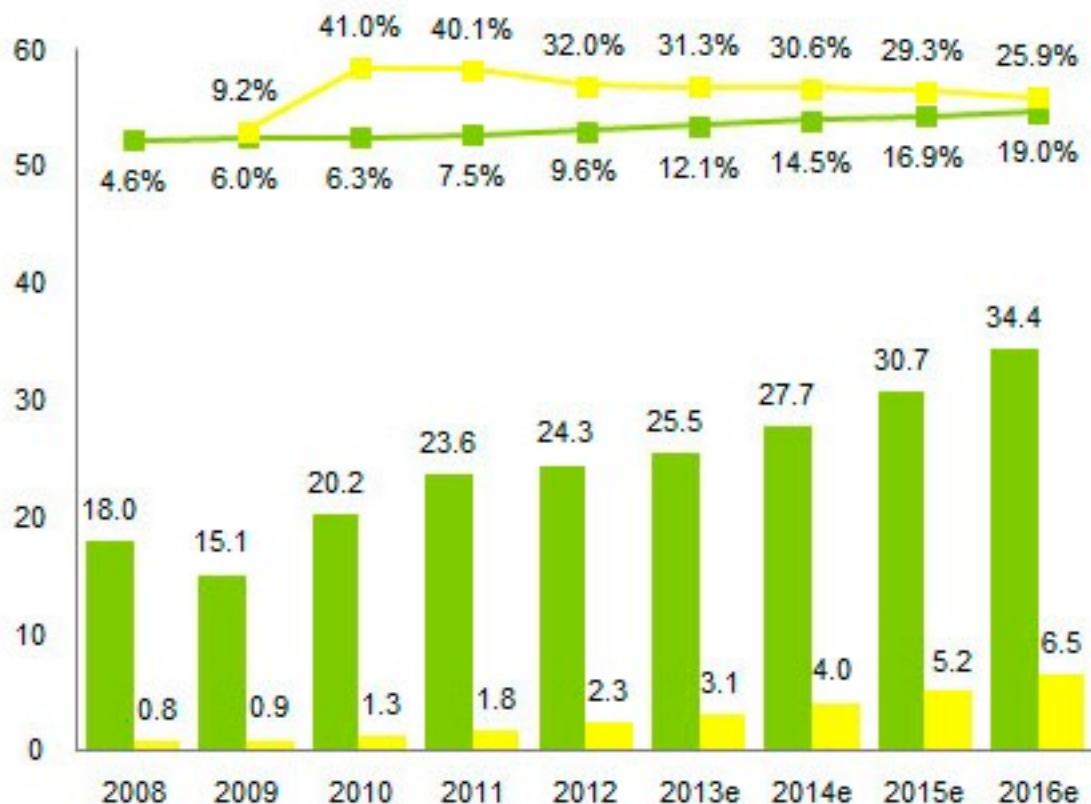
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Cross Border E-Commerce 跨境电商



中国进出口总额变化 VS 跨境电商交易额变化

The Sum of China Imports & Exports vs. Value of Cross-border E-commerce Transactions 2008-2016



- The sum of imports & exports (trillion Yuan)
- The Value of cross-border e-commerce transactions (trillion Yuan)
- % Share of cross-border e-commerce transactions in total imports & exports
- % Growth rate of cross-border e-commerce transactions

Since 2012
2,000 companies have registered
as cross border traders

自2012年起，2000家企业已经注册
开展跨境电商业务

Cross Border Percentage Total Imports / Exports

2008 – 4.6%
2016 – 19%

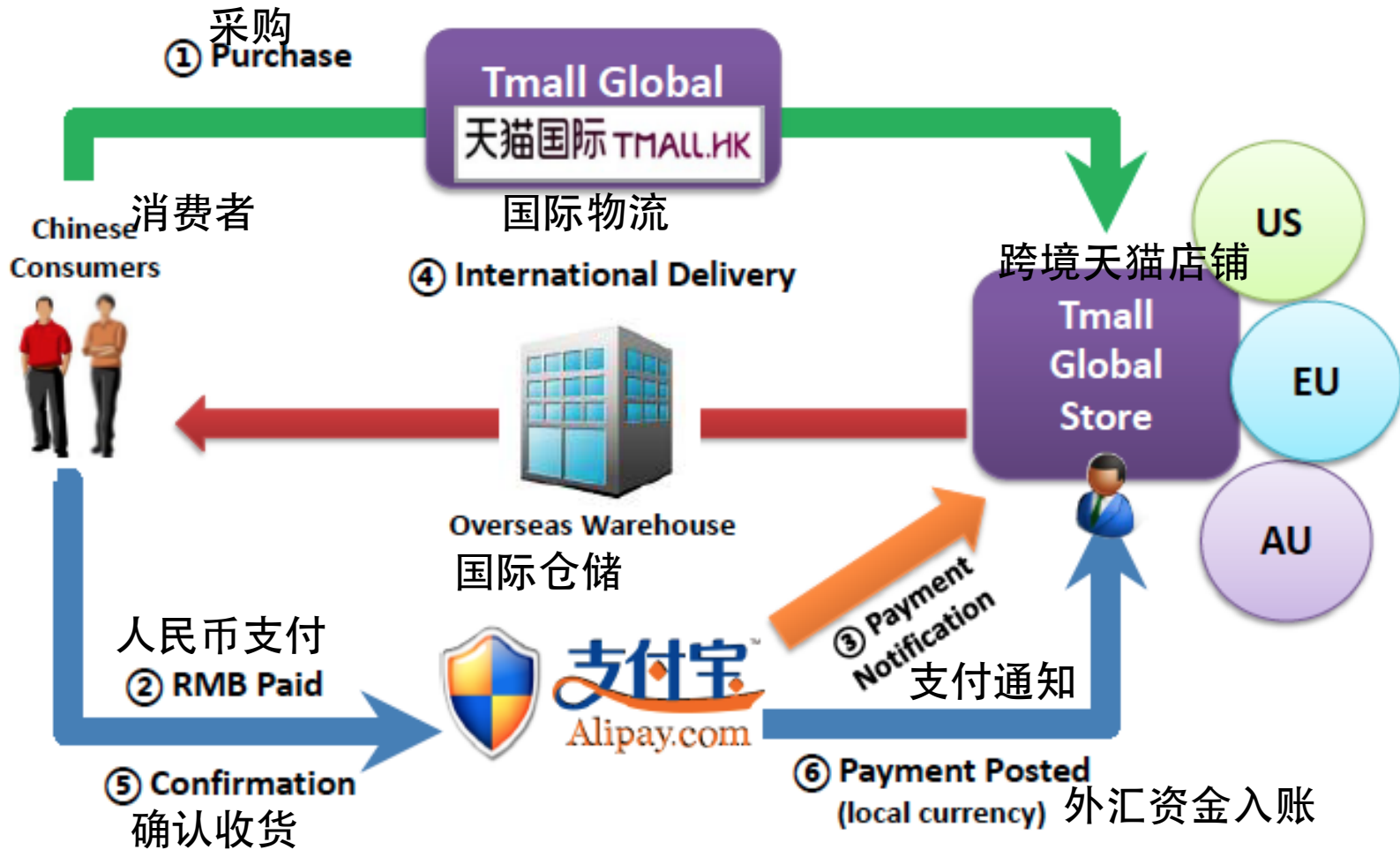
跨境电商占进出口总额的比例

2008 – 4.6%
2016 – 19%

Source: www.iresearchchina.com

进出口总额 (万亿)
跨境电商交易额 (万亿)
跨境电商占进出口总额的比例
跨境电商增长率

Cross Border E-commerce 跨境电商



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Cross Border E-commerce Insights 跨境电商运营模式



3rd Party Customer Service Company (TP Firm)

跨境电商专业运营公司（第三方）

- **Need TP company 专业运营公司**
\$1,500 - \$4,800 monthly fees
3 - 10 % profit share
每月1500-4800美元不等的服务费用
销售额3-10%抽成
- **Need Warehousing (inventory control) 仓储方案**
(存货控制)
- **Shipping \$4 per lb. \$1 every lb. after 国际物流转运首重4美元，每增加一磅增加1美元**
- **Customs 10% tax if over ¥500 in value**
超过500元的包裹收取顾客10%的进口关税
- **Tmall Global (Need Invite) 天猫国际（仅接受邀请）**
\$25,000 deposit (refundable)
\$5 - 10 thousand annual fee
3% commission per sale
1% for currency exchange
25000美元押金（可退）
5000-10000美元年费
每笔订单3%天猫抽成
1%货币兑换费用
- **Not all products can use free trade zone**
自贸区可接受的商品类别有限

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**Introduction
to
U.S. - China Health Products Association
美中健康产品协会介绍**

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Intro to U.S. – China HPA 协会介绍



Established: July 28, 2010

成立时间: 2010年6月28日

Status: U.S. Non-Profit 501c6 Organization

注册性质: 美国非营利性组织

Model: Traditional Association / Business Consultancy

运行模式: 行业协会/商务咨询

Position: Largest foreign organization of companies focused on dietary supplements and nutritional ingredients in China

定位: 中国保健食品行业最具权威性的国外协会组织。

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USCHPA MEMBERS 协会会员



Intro to U.S. – China HPA 协会介绍



Association Services: 协会服务

1. Regulatory Advocacy	法规促进
<i>Annual Industry Paper</i>	年度行业报告
<i>Comments to China Gov.</i>	递交行业意见
2. Business Services	商业服务
<i>On the Ground Partner</i>	准入咨询
<i>Product Registration</i>	产品注册
<i>Market Intel</i>	市场调研
<i>Trade Mark Issues</i>	商标注册
<i>Quality Assurance</i>	质量认证
<i>Sourcing Assistance</i>	供应商信息
<i>Conferences/Networking</i>	组织会议/行业交流
<i>Partner Introductions</i>	合作伙伴介绍



Staff 协会员工

Jeff Crowther-	Executive Director/Founder 执行董事
Ben Zhang-	Science/Regulatory Manager 科学及法规事务经理
Lilian Lin-	Communications 媒介公关经理
Guo Jing -	Translation / Interpretation 翻译
Guo Junlong-	Web Designer / IT 网络经理
Carrie Wang-	Researcher 研究员
Coco Liu-	General Assistant 董事助理

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Nutritional Outlook Magazine: “Best of Industry Award 2014”
美国《营养展望杂志》授予 USCHPA “2014年最佳行业协会奖”



U.S.–China Health Products Association

Navigating China’s complex natural-products industry is easier, thanks to the USCHPA.

BY KIMBERLY J. DECKER

[Article Link Here](#)
文章链接



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China International Nutrition and Health Summit 2014 2014中国国际营养与健康产业峰会

Bringing the Dietary Supplement and Nutritional Ingredient Industry together
探讨膳食补充剂和营养原料工业合作前景

U.S.– China Health Products Association 美中健康产品协会
CCPIT Sub-Council of Chemical Industry 中国对外贸易促进委员会化工行业分会

Nov.3 – 4, 2014
2014年11月3日–4日



- USCHPA hosted the first annual summit on November 3-4, 2014 in Beijing.
2014年协会成功举办中国营养与健康产业峰会
- 110 Global Attendees representing 60 organizations
60家全球企业，110名参会人员
- 24 Presentations from leading Industry experts
24个行业专家进行精彩演讲
- 5 Governments involved: Canada, China, Israel, EU Delegation and U.S.
5国政府组织出席：加拿大、中国、以色列、欧盟、美国。



INSIDE THIS ISSUE

USCHPA Submits Comment Paper to CFDA

CFDA Released New Regulation Draft on Cosmetics Management

China to Relax Limit on Online Drug Sales

Zhengzhou Regulator Warns Online Purchasing of Foreign Health Products

Wal-Mart Feels Pinch From China Austerity Campaign

Imported cosmetics face stiffer regulation

Traditional Chinese Medicine Gets Traction Among Scientists



USCHPA Submits Comment Paper to CFDA

On November 5, 2014, China's FDA released two draft regulations for nutritional supplements entitled, "Administrative Regulations for Nutritional Supplements and Information Requirement for Nutritional Supplements". At this time, the draft regulations are defining "nutrients or nutritional supplements" as vitamins and minerals.

The USCHPA submitted their comments and requests for clarifications to China FDA on November 26, 2014. The association's major ask is that CFDA consider adding ingredients other than just vitamins and minerals to their definition of "nutritional supplement" such as Omega Fatty Acids, Lutein, Lycopene, amino acids, probiotics, Coenzyme Q10 and other ingredients that are nutritionally important to enhancing a healthy diet and lifestyle.

These new drafts are a step in the right direction and are the first step by CFDA to gain more control over the industry while streamlining administrative processes and creating a more open market for dietary supplements.

As mentioned, this is just the first step. There is still a lot of work a head. USCHPA sees this as a positive move by CFDA. The association will continue to share information with CFDA and all other relevant government agencies and organizations in order to encourage the continued development of China's dietary supplement industry.

The translated regulations and USCHPA's report to CFDA can be found on the association's site by clicking: [HERE](#)



Weekly English Newsletter
145+ Issues Archived
Over 5,000 Database
130期英文电子周报
每次5000人的发送量

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Are you seeking a reliable partner to help you navigate and successfully enter the China dietary supplement market?

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健康周报

第 10 期-2014 年 12 月 3 日

本期内容

第十三届中国国际营养健康产业博览会圆满闭幕

中澳自由贸易协定将对澳有机食品市场带来利好

黄连素可以激发棕色脂肪活性

预计 2017 年功能性食品市场将增长 25%

美国茶叶市场销售增长 5.9%

南美市场的融合



第十三届中国国际营养健康产业博览会圆满闭幕

由国家商务部批准，中国对外贸易经济合作企业协会、中国健康产业发展联盟、中国健康产业工作委员会、中国营养协会、亚洲保健营养促进委员会、亚洲经济贸易发展中心主办，北京海名汇博会展有限公司承办的“2014 第 13 届中国国际营养健康产业（北京）博览会”30 日在北京圆满闭幕。根据主办方的数据，本届展会总面积达到 25000 平方米，有来自二十七个国家和地区的超过一千家参展商，总共参观人数超过八万人。

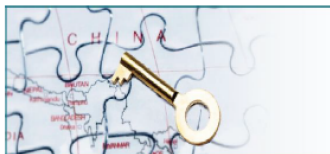
美中健康产品协会作为专业买家也到会进行了实地的考察，总体来说，本次展会还是非常成功的，但是从美中健康产品协会的角度，我们可以提供几点参考意见：

1. 作为一次国际性的展会，此次展会参展的外国厂商大都来自中国临近的亚洲国家，欧美参展商比较少。我

“Health Weekly –健康周报” Chinese Language Weekly Newsletter 中文周报

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Intro to U.S. – China HPA 协会介绍



SOCIAL MEDIA 社交媒体
Launched WeChat Group - December 1, 2014
2014年1月正式开通微信公众账号



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**THANK
YOU**

Jeff Crowther 杰富礼
Executive Director 执行董事

jcrowther@uschinahpa.org

感谢聆听!



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