

Mar., 2021, Beijing

Opportunities and Challenges for Chinese Multimodal Marketing in 2021

——Health & Nutrition Food



Did you get these hot spots in 2020?

Cross-over	co-branded	Celebrity' s/ KOL' s pick
Free sugar, no fat	Tiktok/ Short video	Live-streaming sales
Kuaishou, Xinba	Viya,Austin Li,Luo Yonghao	Bilibili, Youngster



01

The development of health and nutrition food is accelerating in 2020 in China

02

Transformation in offline retail channels-
- Digital Transformation & New Retail

03

Diversified online channels—Live streaming sales

04

Examples of Chinese marketing hot spots worthy of attention

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Analysis and summary

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Part 01

The development of health and nutrition food is accelerating in 2020 in China

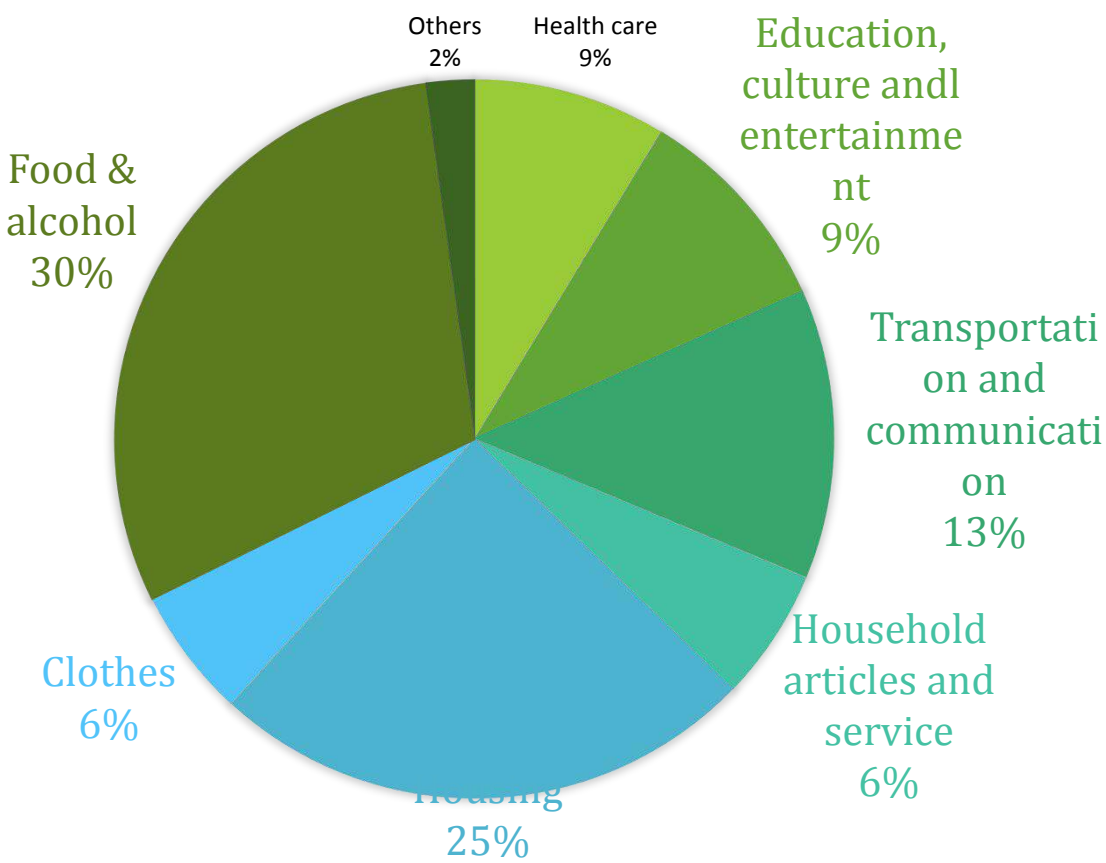
01 The nutritional & health food industry in China has been developing steadily in recent years. Keeping healthy through health food becomes a lifestyle.

Market Scale and Forecast of China's Nutrition and Health Food in 2013-2021



Original from iimedia Research

Per capita consumption expenditure and composition in 2020

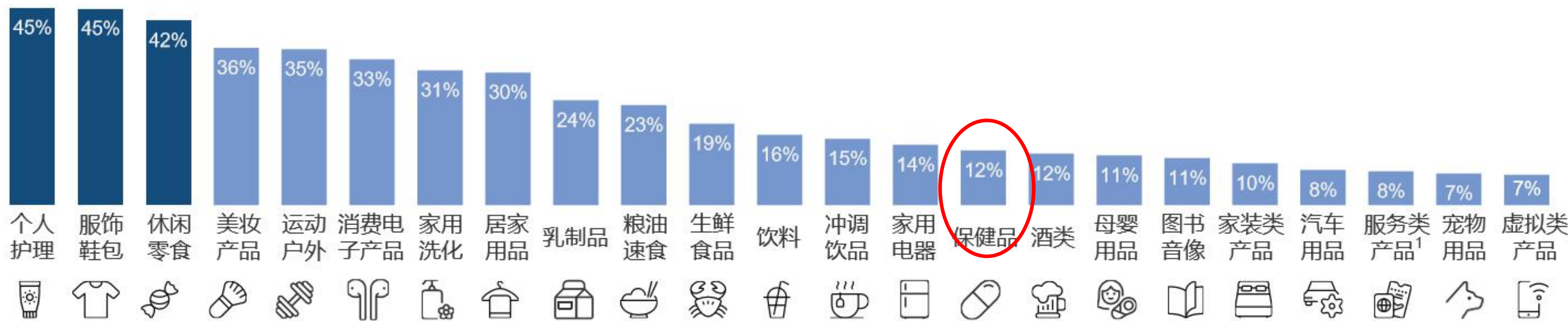


Original from China National Bureau of Statistics

02 Consumer insights during Double Eleven in 2020

In the post-COVID-19 era, health awareness has been greatly enhanced, and consumers' willingness to buy personal care, nutrition and health products and other health products during Double Eleven is significantly higher than that of 2019.

Categories that consumers plan to buy during Double Eleven



Respondents' planned purchase category preferences (by revenue segment) are covered as follows

- 5000 Yuan and below
- 5000-10,000 Yuan
- 10,001 Yuan and above

Nutrition and health food increased by **12%**

03 Business data brief report of healthcare industry on Taobao during Double Eleven in 2020

It only took **10 minutes** for Tmall Global health care industry to reach over **100 million** sales on November 11 2020, with a year-on-year growth of more than **50%**.

Tmall Global health care industry | Category, brand, store and product ranking list

Dietary supplement



Traditional tonic



Product Category TOP5



Growing category TOP5



Brand TOP5



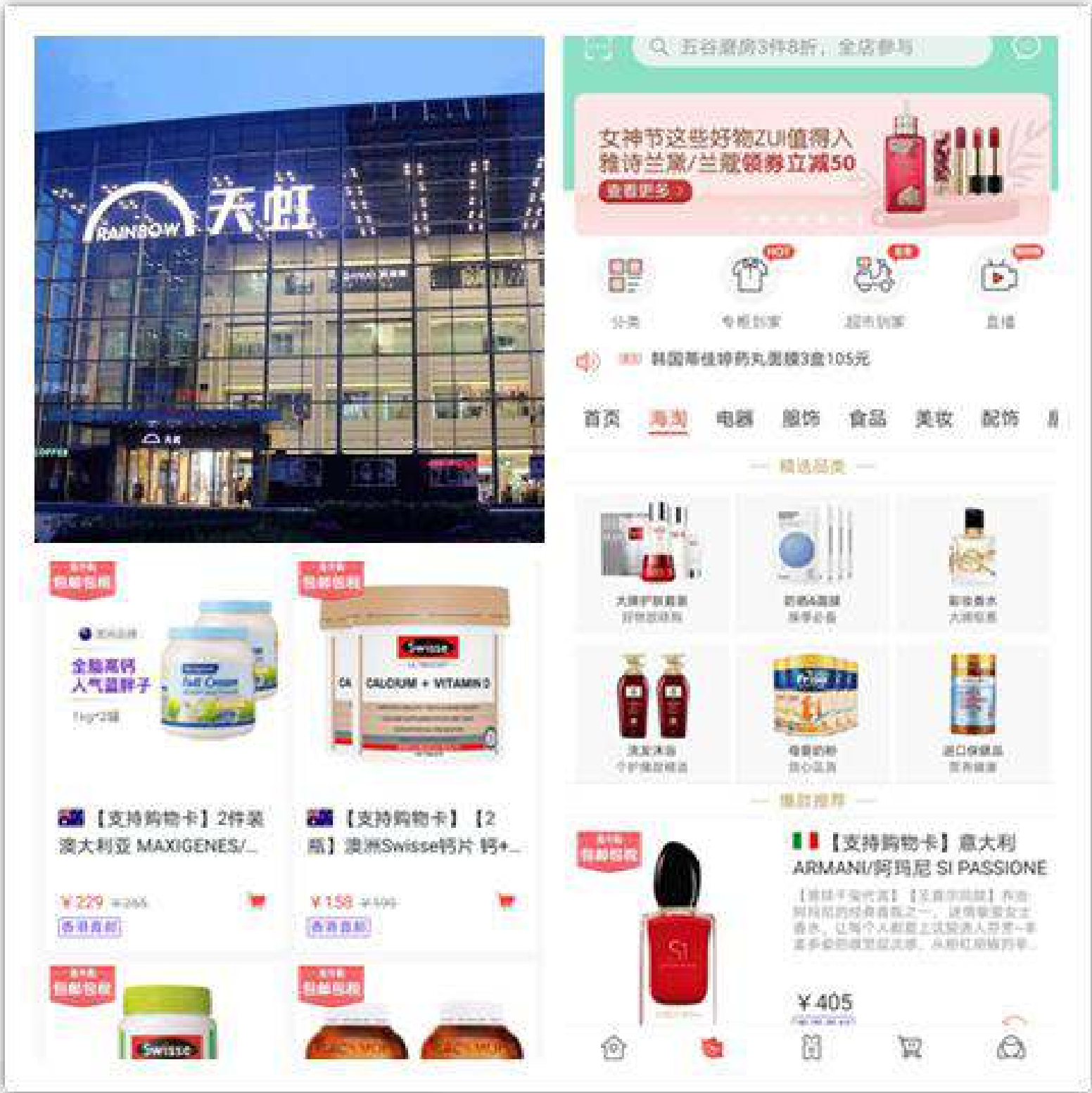
Data original : Tmall Global



Part 02

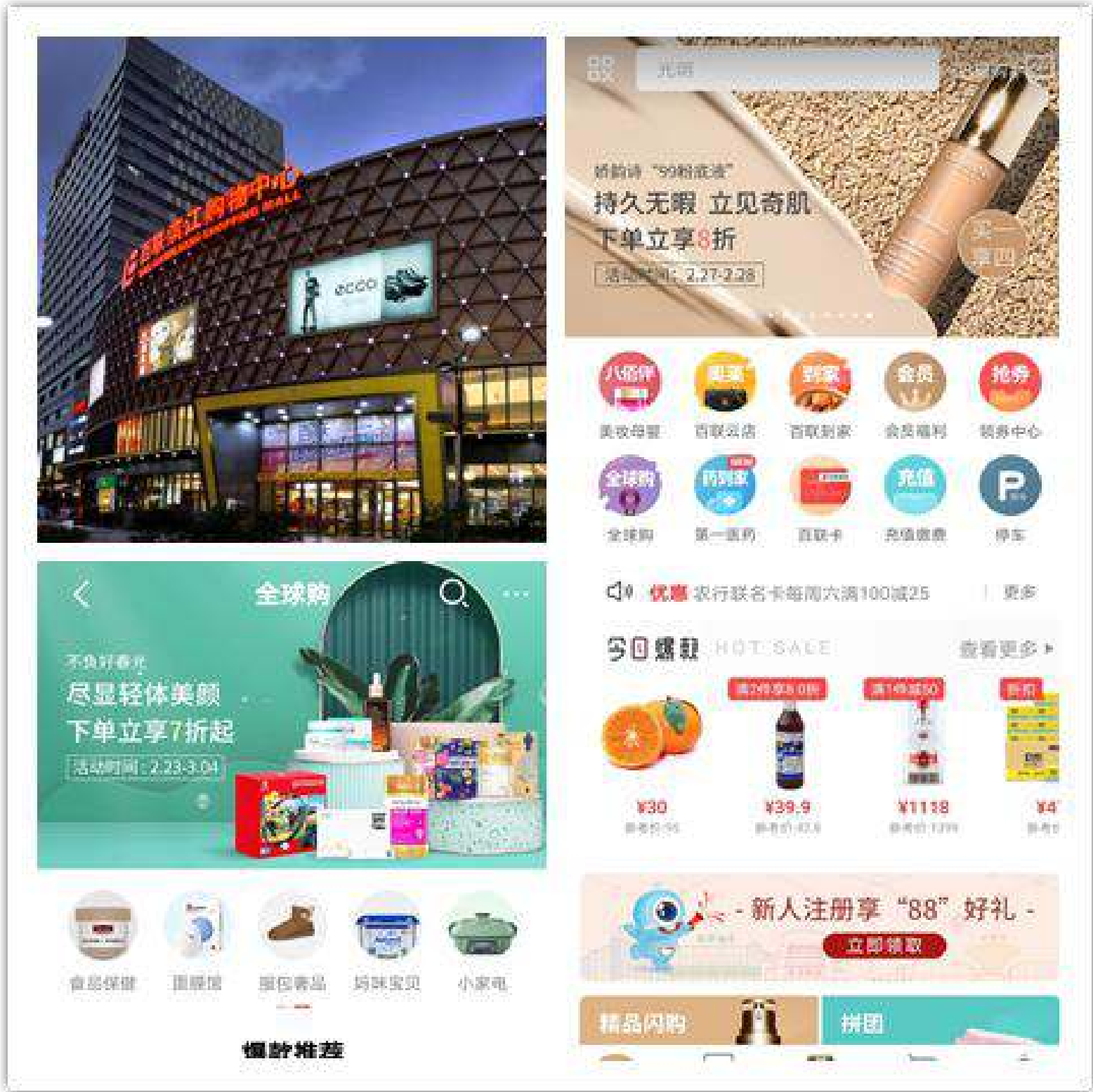
**Transformation in offline retail
channels -- Digital Transformation
& New Retail**

01 Digital transformation accelerated by Offline retail



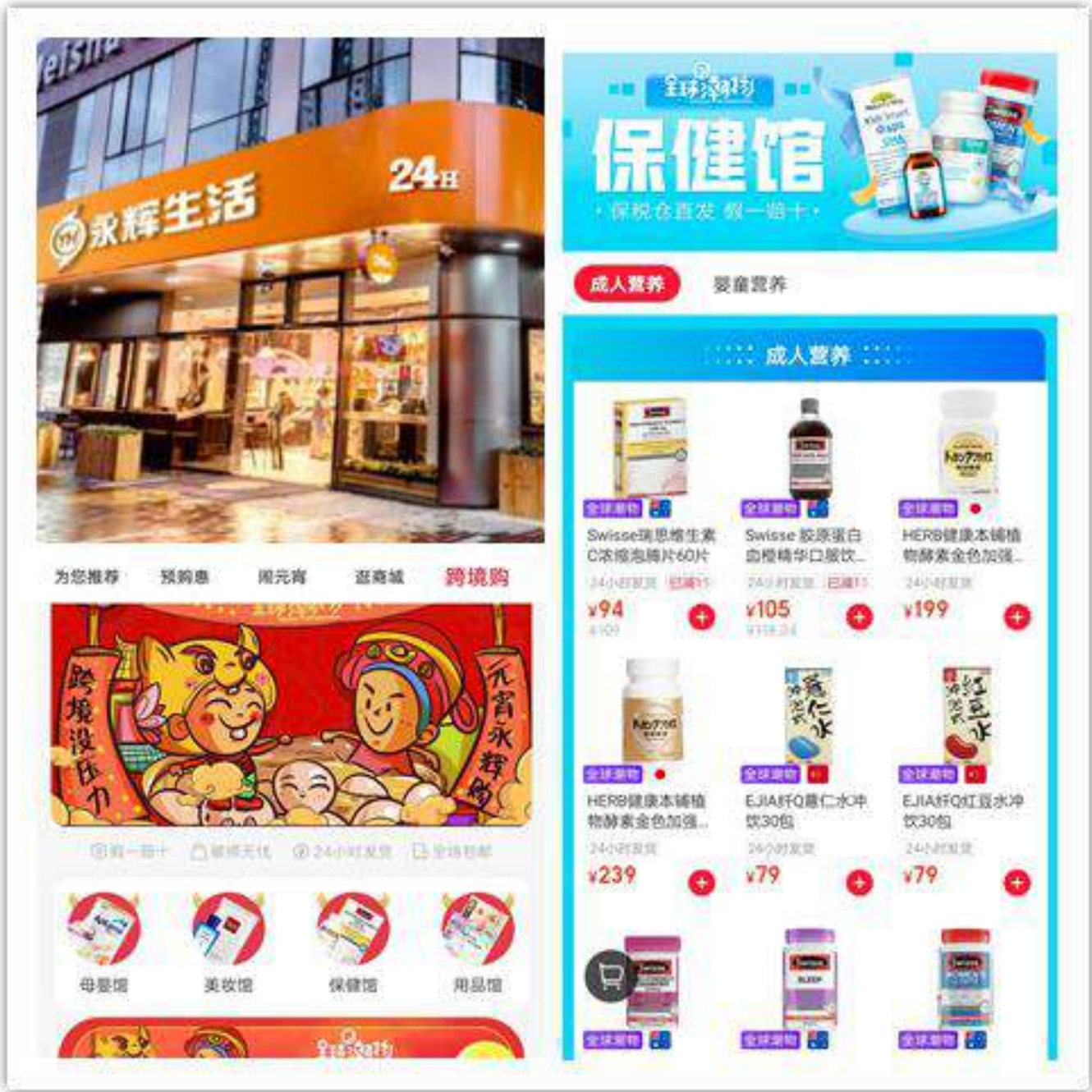
The RAINBOW department store O2O

Department store and shopping Centre



The BAILIAN Group O2O

01 Digital transformation accelerated by Offline retail



YONHUI SUPERSTORES O2O

Supermarket & Drugstore



NEPSTAR on ELEMA

02 New Retail

Restructuring the online and offline retail business



Fresh HEMA-fresh goods supermarket



Missfresh- fresh goods supermarket



Dingdang Kuaiyao-pharmacy



Part 03

**Diversified online channels—
Live streaming sales**

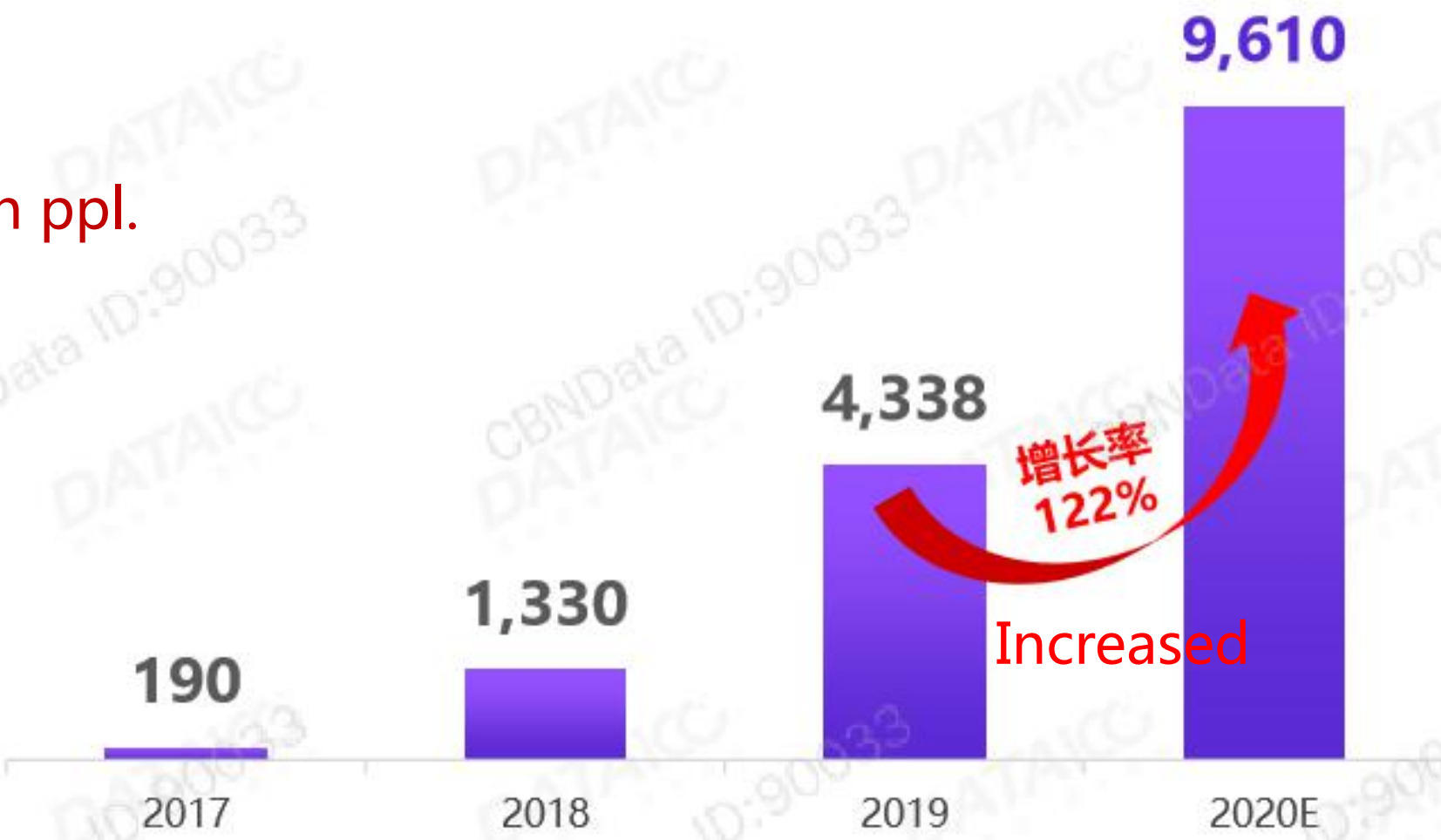
01 Livestreaming E-commerce Value

As of March 2020
online shoppers VS. Live streaming e-commerce users



Unit : hundred million ppl.

2017-2020
The value of livestreaming e-commerce



Unit : hundred million yuan

Note : Statistics from CNNIC and Data100

02 Taobao live business data brief report during Double Eleven in 2020

During Double Eleven , hosts and merchants continue to break out in Taobao live

*During Double Eleven
Taobao live **GMV** increased by*

100%+

*In past 12 month Live
streaming merchant
increased by*

220%+

*Part of the live streaming studios with
turnover of more than 100 million*

雅诗兰黛	ESTEE LAUDER
华为终端	HUA WEI
L a n c o m e 法 国 兰 蔻	LANCOME
海 尔 官 方 旗 舰 店	Haier
小 米 官 方 旗 舰 店	MI
欧 莱 雅 旗 舰 店	L' OREAL
苏 宁 官 旗	Suning
SHISEIDO资生堂官方旗舰店	SHISEIDO
荣 耀 官 方 旗 舰 店	SHISEIDO
L A M E R 海 蓝 之 谜	Honor (HUAWEI)
.....	

Key Points

- **300 million** users , GMV **doubled**.
- In the **1st hour**, **12** single products exceeded 100 million
- **33** Taobao live studios exceeded 100 million
- Merchants’ live streaming increased by **220%+**

Note : 1. GMV includes direct live transaction, pre-sale deposit and balance payment.
2. Double Eleven refers to the period from November 1 to November 11, 2020

03 Diversified live streaming platforms in China



01

Taobao Live

Livestreaming sales platform
Highly focus on 2 top live stream hosts
Viya and Austin Li



02

JD Live

Livestreaming sales
No top live stream host
With a proposed USP of greater quality contents and logistics



03

Red Live

Essential product education
Life-style sharing
Creator's stage



04

Douyin Live

Cash in flow
Content sales
Stars and celebrities join
Top hosts: Luo Yonghao and Chen He



05

Kuaishou

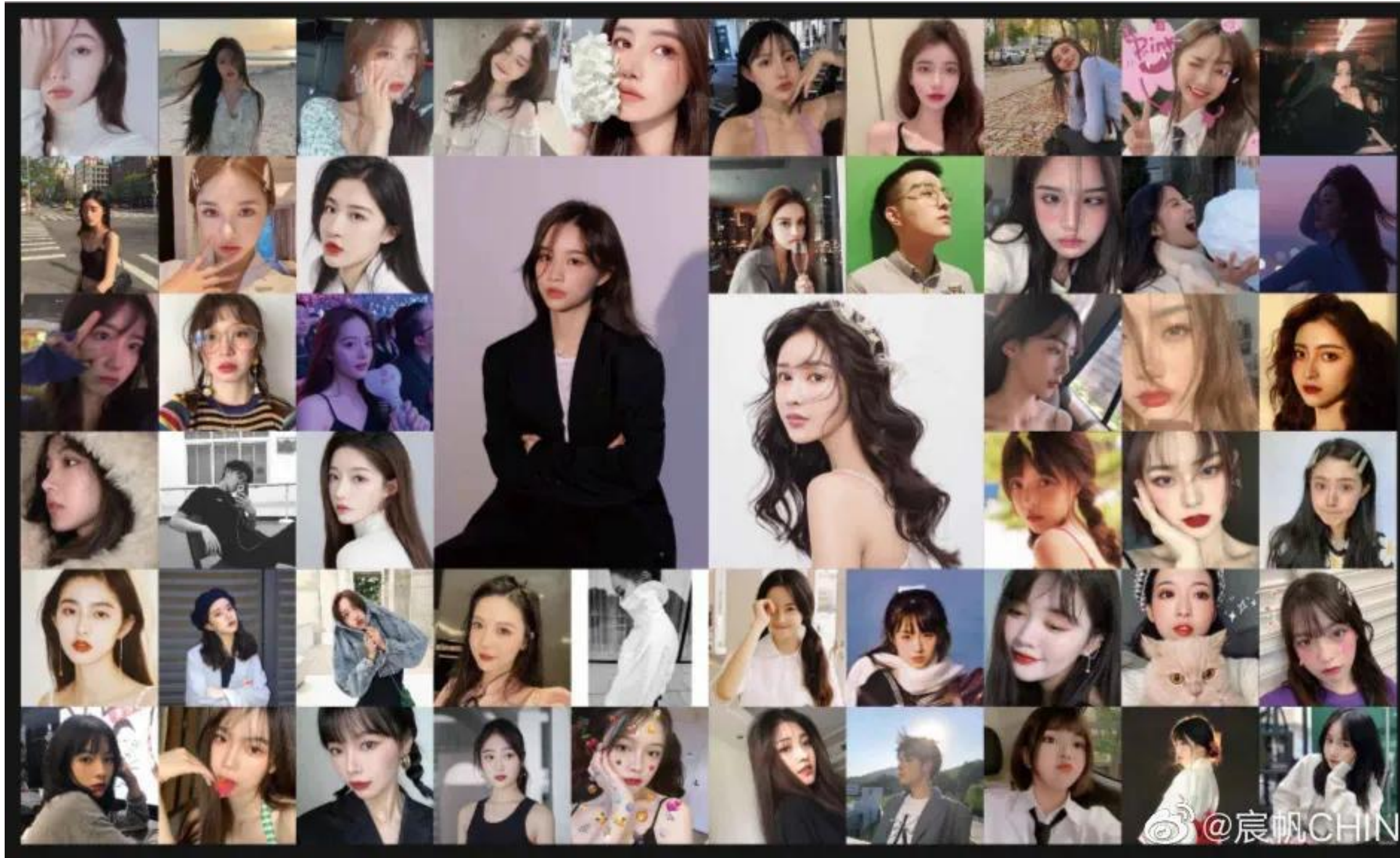
Intra-city & social contact
"homie economy"
Top host "Xinba"



Part 04

**Examples of Chinese marketing
hot spots worthy of attention**

01 Internet influencer economy Case study : The Chenfan Commercial Co. by Cherie



□ It recently received tens of millions of US dollars in Series round B financing.

□ Contract influencer **300+**

□ Fans **330 mil.**

□ Characters:

- Focus on in-depth female consumption
- Self-owned brands covering women's wear, children's wear, home life, beauty makeup
- Deep Recommendation – influencer Marketing -- Fission Sharing for After-Sales Users
- Reengineered flexible supplychain
- Live streaming sales
 - Top 3 KOL of Taobao Live
 - Sales volume of 2.5 bil. led through its livestreaming sales in 2020 double 11 day

02 Fresh food e-commerce/Local living service/Community Group purchasing

Internet grocery field guide



Top E-commerce



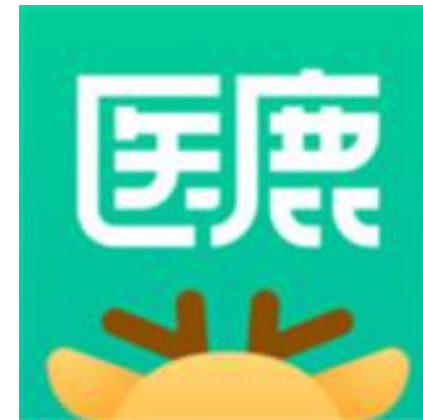
APP



Alliance or Self-operation



03 Other hot distribution channels : Internet medical care、 private traffic economy...



Tencent 腾讯



Internet hospital、 on-line pharmacy

We-chat eco-matrix
– Channels (**new**)



Part 05

Analysis and Summary

01 Summary

Change of
consumers

Change of
distribution
Channels

3 "A"
Tips on
entering
Chinese
market



Generation Z personalized, digital, focusing on convenience and experience

Break through barriers between online and offline sales

→ **Adapt** to consumers-centered multi-modal marketing

→ **Accelerate** product upgrading, foster solid supply chain

→ **Attend Healthplex Expo** to know more about China's market and seek local cooperative partners

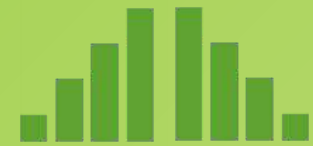
02 Healthplex Expo 2020 Review

HEALTHPLEX EXPO 2020



DATE 25-27th Nov., 2020

VENUE NECC Exhibition Centre



SPACE 160,000+ m²



EXHIBITOR 1800+



VISITOR 80,000+



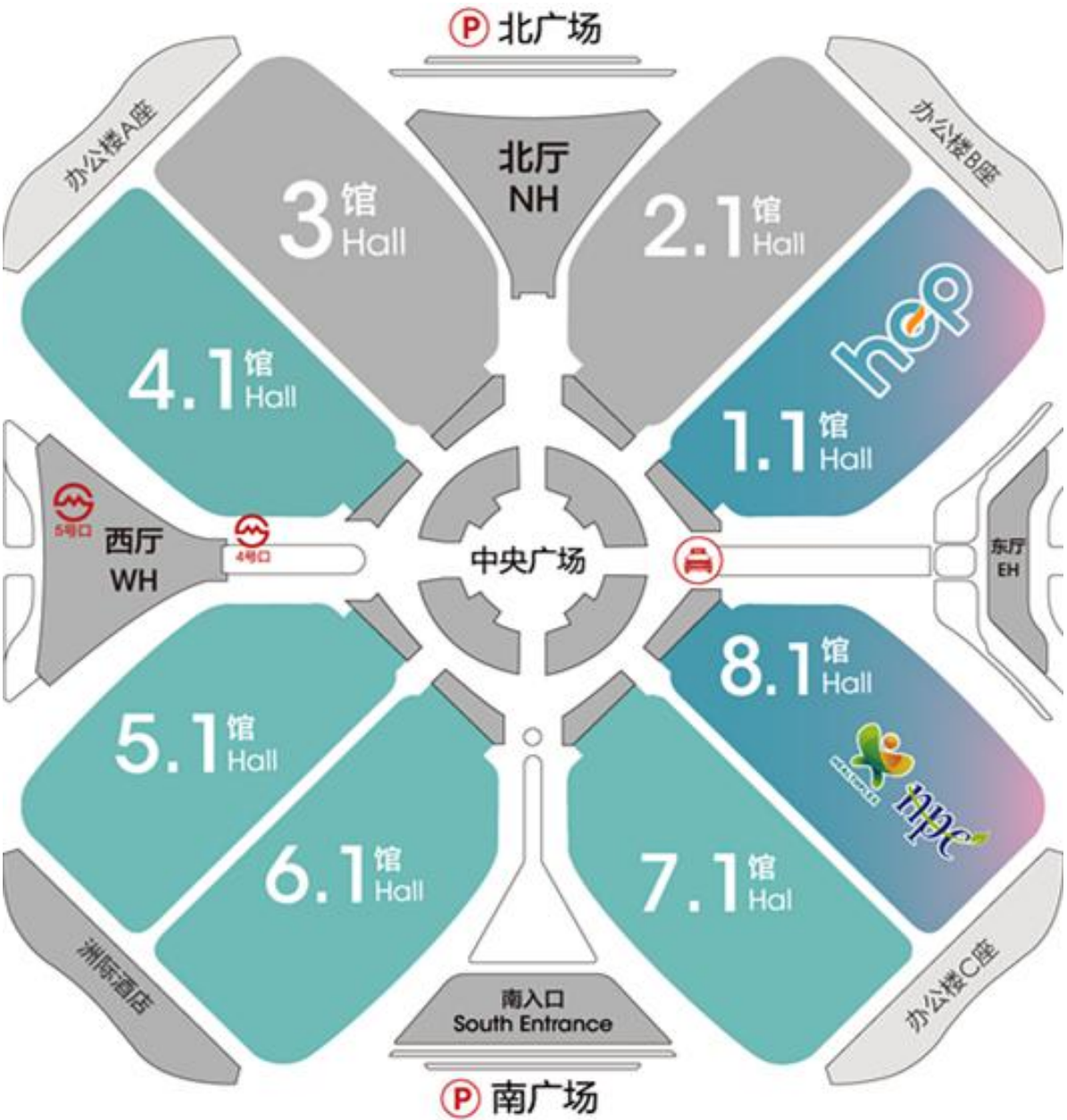
ON-SITE EVENTS 60+

Note: space, visitors shared with co-located Food series show



02 Healthplex Expo 2020 Review

A big Health Industry Chain in 2020



Nutrition & Health Food



Health Equipment & Products



Natural & Organic Food



See You

Jun. 23rd-25th 2021, Shanghai

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