



The China Supplement Edge

August 2026 Edition

Monthly China Market Intelligence Report



About This Report

The China Supplement Edge is a monthly HPA-Global member intelligence report produced in collaboration with Kung Fu Data.

It is designed to provide members with timely information on regulatory developments, market trends, supply-chain developments, platform activity and consumer behavior affecting China's nutrition and health-products industry.

Commentary and forward-looking observations are provided for informational purposes and are intended to help members evaluate developments relevant to their individual businesses.



1. China's Draft Probiotic Rules Could Reshape Your Formula

STATUS: DRAFT CONSULTATION | Published 24 Jul 2026 | Comments closed 24 Aug 2026 | Not yet final

Draft rules for probiotic health foods in China are a double-edged sword. While opening a faster path to market for some, they significantly raise the bar for product formulation and documentation.

The New Opportunity: Faster Market Entry

For the first time, getting your probiotic strain approved in China's health-food raw material catalogue means products using it can bypass lengthy full registration and go through a simpler, quicker filing process.

- Reduced time-to-market from years to months.
- Simplified regulatory pathway for listed strains.
- Significant cost savings on approval processes.

The New Barrier: Stricter Requirements

If finalized as drafted, the proposed rules would introduce stricter requirements that could affect many existing products:

- **Proposed Single-Strain Requirement:** Under the draft, commercial probiotic raw material **would need to** contain a single, identifiable strain.
- **Proposed Documentation Requirements:** Under the draft, each strain **would require** a unique strain number, inclusion on China's permitted species list, genetic stability data, and drug-resistance/toxin-production reports.
- **Higher Live Count:** Under the draft, products would need to maintain **10⁷ CFU/mL(g)** through the end of shelf life - ten times the previous standard.

The Bottom Line: Science Over Paperwork

The era of buying market entry with paperwork is ending. The new competitive edge in China's probiotic market will belong to brands with robust scientific backing for their single strains and strong manufacturing practices capable of meeting the higher live count standard. Generic premixes are now a major liability.

 **Member Consideration:** Brands may wish to review supplier readiness now, including access to individual strain documentation and live-count stability data, while recognizing that requirements remain subject to the final text.

2. China Still Loves Imported Supplements. But the Winners Are Changing.

47.7%

Cross-border share

of China's online supplement sales, H1 2026. RMB 67.28bn total.

−2.98%

Import decline

Dietary supplement imports fell to US\$3.857bn. Growing channel, shrinking imports.

34.1%

Douyin share

of online supplement sales, passing Taotian group at 30.3%. JD at 22.4%.

−3.1%

Brand count

Cross-border brands down to 3,515. Domestic down 2.7% to 9,570. Fewer players, bigger winners.

Losers — Country of Origin

Origin	Change	Value / Share
United States	−16.31%	US\$687m; share 17.81% (from 20.65%)
Germany	−19.18%	—
EU (bloc)	−15.40%	—
Hong Kong transshipment	−37.15%	—

Winners — Country of Origin

Origin	Change	Notes
Australia	+10.14%	After a brutal 2025
ASEAN	+25.63%	—
Peru	+182.80%	US\$175m from US\$62m — fish oil

Category Performance

Category	Change
Fish oil	+44.91% (imports +60.07%; share 6.04%→9.97%)
Sports nutrition	+31.99%
Medical nutrition	+35.03%
Vitamins	+23.91%
Probiotics	+9.02%
Calcium	+7.10%
Beauty-from-within	−6.81%
Weight management	−23.45%

Life Stage Demand

Segment	Change
Pre-pregnancy	+181.97%
Infant and child	+71.86%
Adults	+70.78%
"Suitable for the whole family"	−11.06%

Data note: Trade values and online sales figures come from different datasets and should not be combined directly.

⚠ Member Consideration: Current data suggest that function and life-stage positioning may be gaining importance relative to country-of-origin messaging. Members may wish to review China positioning and sourcing assumptions in light of these shifts.

3. GB 17405-2025 Takes Effect September 2.

What Manufacturers Should Review

GB 17405-2025, the health-food GMP standard, goes live **2 September**. It retires a rulebook written in 1998.

The standard establishes GMP requirements and control expectations. Some implementation approaches shown below reflect industry guidance and should not be read as universal mandatory specifications unless expressly required by the applicable clause.

- 1

Environmental Controls
GB 17405-2025 strengthens environmental control requirements for relevant production areas. Implementation may include defined air-change controls, pressure monitoring, temperature/humidity monitoring and alarm mechanisms depending on the applicable area, process and facility controls.
- 2

Cleaning and Changeover Controls
The standard strengthens expectations around effective cleaning, sanitation and changeover control. Validated CIP may be an appropriate implementation approach for certain liquid-contact systems and processes, but should not be presented as a universal requirement unless specified for the applicable process.
- 3

Automation and Process Controls
The standard includes requirements relating to automation and control of relevant filling, dosing and sealing operations. Manufacturers should assess the applicable requirements against their specific processes.
- 4

Verification Chapter
Manufacturers should maintain appropriate qualification, validation and re-evaluation activities and reassess controls when material changes occur. The form and frequency of verification should reflect the applicable requirements and facility processes.
- 5

Fermentation Steps
For relevant fermentation processes, microbiological and process controls should address contamination risks, cleaning and sanitation, and controls relevant to strain stability. Specific environmental-monitoring programmes should be determined according to applicable requirements and process risk.

Examples of Industry Implementation Practices

The frequencies and alert/action thresholds below are examples reported in Chinese industry guidance. They are not presented here as mandatory numerical thresholds specified by GB 17405-2025.

Surface / Area	Monitoring Frequency	Alert Line	Action Line
Contact surfaces	Weekly	60–80% of limit	100% — stop line, deep disinfect, retest
Air	Fortnightly	60–80% of limit	100% — stop line
Drains and walls	Monthly	60–80% of limit	100% — stop line

 **Member Consideration:** Ask your manufacturer how it has assessed readiness for GB 17405-2025 and request supporting documentation appropriate to the facility and process. This may include a gap analysis, validation or verification records, updated procedures, and environmental-monitoring documentation.

4. When Your Vitamin Supplier Goes Quiet, Start Worrying

Tianxin Pharmaceutical stopped quoting vitamin E on 14 August. Wanhua Chemical stopped quoting vitamin A on 17 August. A supplier who wants more money raises the number. A supplier with nothing in the tank goes quiet.

The Outage List

Producer / Plant	Vitamin	Downtime
NHU Shandong plant	VE	Mid-Aug to mid-Oct
Beisha Pharmaceutical	VE	6–8 weeks from July
Swiss VE plant (Rhine low)	VE	8 weeks (pulled forward)
Wanhua Chemical	VA	2 months from 20 July
CSPC vitamin unit	Multiple	Late June to end September

That's most of the world's VE capacity sitting in a maintenance bay at the same time. VE doesn't loosen up until Shandong restarts in mid-October — **after your Double 11 volume is locked, costed and sold.**

Spot Prices (Feed-additive, 14 August)

Vitamin	Price	Weekly Change
50% VE	RMB 71/kg	+10.08%
VA	RMB 55/kg	+3.77%

NHU Half-Year Results — 20 August Filing

Metric	Value	Change
Group revenue	RMB 13.129bn	+18.28%
Net profit attributable	RMB 4.011bn	+11.31%
Nutrition arm revenue	RMB 8.806bn	+22.30%
Nutrition gross margin	46.87%	—
Export share of revenue	58.43%	—
Export gross margin	49.26%	vs. 37.14% domestic

A Chinese vitamin producer makes **12 more points of margin** selling to you than to its own countrymen.

 **Member Consideration:** Members with significant Q4 vitamin E or A exposure may wish to review volume commitments, supply coverage and price-escalation protections ahead of Double 11.

5. China Put a Price Tag on Bad Supplement Marketing

Guangzhou's market regulator published its first 2026 batch of typical cases on 17 August.

Invented Percentage → Police

A repeat offender referred to public security under **Article 222 of the Criminal Law** after claiming an indicator dropped 96%. Not a fine. The police.

Unauthorised GMP Badge

Operator used a GMP mark it had no right to use. Penalty: **RMB 247,533**. A shopper BELIEVES a GMP badge — hence 25× the fine for a forged academic paper.

Forged Academic Paper

Penalty: **RMB 10,000**. A shopper skims it. The regulator prices the deception accordingly.

Lab Testing Notices

Notice	Batches Tested	Non-conforming	Notable Failure
市监食检发〔2026〕103号 (21 Aug)	2,325	45	Women's multivitamin gummy sold as sports nutrition food — missed on 12 nutrients vs. national standard and own label
市监食检发〔2026〕92号	2,474	47	Clustered in special dietary foods and energy products

A gummy missing a dozen declared nutrients isn't a typo. It's a formulation that was built to the bottom of the range and then degraded on a shelf.

 **Member Consideration:** Review certification marks and quantified efficacy claims used in China-facing listings and confirm that supporting documentation is available. Members using locally manufactured products may also wish to review end-of-shelf-life assay performance against declared specifications.

6. By-Health Just Showed Us What Growth in China Really Costs

By-Health H1 2026 — P&L Summary

Line	Value	Change
Total revenue	RMB 3.671bn	+3.94%
Online revenue	RMB 1.945bn	+15.51%
Offline revenue	RMB 1.710bn	−4.85%
Selling expenses	—	+25.25%
Net profit attributable	—	−18.11%
Gross margin (H1)	70.33%	—
Gross margin (Q2)	71.56%	—
Domestic online gross margin	76.55%	—

Six times the growth in spending versus growth in sales. At the company with the strongest brand equity in the category and the widest pharmacy footprint in the country.

JD Platform — EarlyData H1 Estimates

Metric	Value / Change
Nutrition & health GMV	~RMB 15.1bn, +10.2%
Active brands	~6,150; top 5 hold 24.2%
Vitamins GMV	RMB 2.14bn, +23.6%
Calcium GMV	RMB 2.10bn, +12.6%
Fish oil	+38.8%
Medical nutrition	+38.6%

Top JD Brands

Brand	Growth
Swisse (#1)	+9.8%
By-Health (#2)	—
Move Free	+23.3%
INNE	+21.4%
Caltrate	+20.1%

JD Health audited H1: revenue RMB 40.9bn, +15.9%; non-IFRS operating profit RMB 3.5bn, +40.3%.

An imported brand can still own a Chinese platform. What's gone is doing it cheap.

 **Member Consideration:** Members may wish to stress-test China P&Ls against higher selling expenses and assess whether product positioning and margin structure can support sustained platform investment.

7. Your Next Compliance Requirement Might Come From a Platform

STATUS: PLATFORM POLICY | Published 20 Aug 2026 | Effective 26 Aug 2026 | Phase 1: Infant & toddler formula

Tmall Global posted the rules for 批批检 (per-batch testing) on 20 August. Live 26 August, after a consultation that ran all of one week.

How 批批检 Works

- 1

Submit per-batch composition report
Before listing. Every single batch, before it goes live.
- 2

Badge on listing
Shopper scans a QR code and pulls up the report for the tin in their hand.
- 3

Compensation trigger
If report can't be retrieved within 48 hours of delivery: 30% of purchase price, floored at RMB 5, capped at RMB 100.
- 4

CNAS/CMA lab failure
Bacillus cereus toxin failure → 退一赔一 plus you cover testing costs.
- 5

Automatic badge revocation
Customs risk notice, recall, or platform sample failure — badge vanishes automatically.

Phase One Scope

Infant and toddler formula only. Nothing in your nutrition range changes this week.

KFD ANALYSIS: Why This Matters

Kung Fu Data believes this type of programme could extend into adjacent nutrition categories if platform-led testing and transparency tools gain consumer traction. **No such expansion to supplements is confirmed at this time.**

 **Member Consideration:** Monitor whether Tmall Global expands the programme beyond its current Phase 1 scope and consider whether existing laboratory and release processes could support per-batch reporting if similar requirements reach nutrition categories.

Other Developments Worth Watching

Two More Draft Consultations Closed

《使用植物原料的保健食品注册申报管理规定（征求意见稿）》 and its animal-origin twin went out the same day as the probiotic draft, 24 July, same 24 August deadline. If you file botanicals or marine ingredients, that's your category being rewritten too.

Fujian Cut a Step Out of the Process

Notice 闽市监特食〔2026〕168号, signed 18 August: the production licence and the domestic health-food filing certificate now come out together. Small thing, real time saved, and provinces copy each other.

Lycopene Draft Still Awaiting Final Action

Draft published 2 April with 4 permitted forms and a new "supplement lycopene" claim, comments closed 10 May, and today, still nothing. Anyone banking on a filing-route lycopene product is on hold indefinitely.

Feihe Is Coming for Imported Whey

At the second Precision Nutrition conference in Harbin, 21–23 August, it launched 智纯, an ingredient brand with 6 protein ingredients and 3 bases running 3,000 tonnes a day, signing 康比特, 西子健康, 百合生物 and JD on day one. The stated target is China's roughly 90% dependence on imported whey. A dairy company just became your ingredient competitor.

Probiotic Manufacturers Getting Squeezed

Kexing Biosciences, 23 August: revenue RMB 170m, +3.77%; net profit RMB 25.1m, **-39.09%**, with new customers in Australia, Indonesia and the US. Selling more, earning less. That's overcapacity, and it's the supply side of the new probiotic rules.

Cabio's ARA Business Fell Off a Cliff

First-half revenue RMB 57.59m, **-81.22%**; net loss RMB 101m; RMB 31.51m of impairments; ST designation since 28 July. If your infant formula has a single-source ARA supplier, go check who it is.

China–Switzerland FTA Upgrade

Talks concluded, MoU signed in Bern on 20 August, protocol still needs domestic procedures. Swiss reporting points to 99.8% of Swiss export lines eventually hitting zero tariff. Whether supplement lines are in there is not confirmed. If they are, part of cross-border's duty advantage evaporates for Swiss goods.

The Border Is Rejecting a Lot More Cargo

First-half 2026 refused food and cosmetic consignments hit **3,243 batches, up 54.95%**.

KFD Analysis: Emerging Signals

Five interpretations and forward-looking signals based on this week's regulatory, market and company developments.



Draft Probiotic Rules Could Favor Dossier-Ready Strains

Article 9 is the first genuine filing route for a live-culture product in China. The companies with deposited strains and real data will walk through it. The companies buying white-label powder from a broker are locked out of the category. Watch who files first, because that's the new league table.



Country-of-Origin Premiums May Be Repricing

America -16.31%, Germany -19.18%, Peru +182.80%, ASEAN +25.63%, all in 6 months. If that holds through the second half, "imported from a country you trust" stops being a selling proposition and becomes a cost problem.



Platform Rules Are Creating a Second Layer of Compliance

Tmall Global's per-batch scheme has a testing standard, a trust badge, an automatic kill switch and a compensation table, all set by the platform. That's a regulator without a comment period. Expect the model to travel.



Chinese Ingredient Makers Have Discovered Branding

Feihe launching a named protein ingredient and NHU earning 12 more points of margin on exports than at home are the same story from both ends. Your supplier is becoming your competitor's supplier, then your competitor.



Specific Beats General, and It's Not Close

Pre-pregnancy +181.97%, infant and child +71.86%, sports nutrition +31.99%, medical nutrition +35.03%. Weight management -23.45%, whole-family -11.06%. The general-purpose imported multivitamin is sitting in the only shrinking corner of a growing market.

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The China Supplement Edge is an HPA-Global member intelligence brief produced in collaboration with Kung Fu Data.

It brings together regulatory developments, market data, platform changes and supply-side signals to help HPA-Global members better understand developments affecting the health and nutrition products industry in China.

This intelligence is provided as part of HPA-Global's commitment to keeping members informed, connected and prepared for change in global markets.

Member & Association Enquiries

HPA-Global

jeff@hpaglobal.org

China Research & Market Enquiries

Kung Fu Data

josh@kungfudata.com

