

激活健康消费，助力健康中国

天丝集团¹

摘要

“十五五”规划纲要提出，要“加快建设健康中国”，“把保障人民健康放在优先发展的战略位置”也成为全社会共识。健康消费作为拉动内需、赋能民生的有力引擎，正从“可选消费”向“刚性需求”转变，市场规模持续扩容、消费结构不断升级，消费者对健康饮品²的需求也从基础补给，向营养适配、场景细分、绿色低碳的多元需求升级。健康饮品行业作为健康消费领域的重要细分赛道，既承载着满足全民健康需求的民生价值，也肩负着推动消费品工业高质量发展的产业使命，在创新升级与场景拓展中迎来新的发展机遇，更成为中外企业深耕中国、共享发展红利的重要赛道。

天丝集团始终将中国市场视为核心战略市场，秉持将卓越的产品和服务带给全球消费者的愿景，在产品研发、模式创新、社会责任等方面持续投入——依托全球研发中心深耕本土化创新，推出适配中国消费者健康需求的低糖³、零糖及功能性延伸产品，引领健康能量饮品消费升级；构建起覆盖线上线下、城市乡村的全渠道消费服务网络，联动上下游产业链赋能中小企业发展，助力健康消费触达更广泛的地区及群体；积极践行外资企业社会责任，深耕全民健身、健康科普、绿色低碳等领域，推动健康理念普及。基于此，

¹ 本报告仅代表企业相关研究观点，不代表论坛主办单位和承办单位立场和观点。

² 本文所称“健康饮品”，泛指以满足健康消费需求为导向，在配方设计、营养结构或功能属性方面具有一定健康价值的饮料产品。其范围主要包括低糖或无糖饮料、功能性饮料、运动饮料、植物基饮料、含维生素或矿物质强化的营养型饮料等品类，不包括酒精饮料。

³ 本文所称“糖”，主要指饮料中可被人体吸收利用并产生能量的单糖和双糖类碳水化合物，主要包括葡萄糖、果糖、蔗糖、乳糖和麦芽糖等。上述糖类既包括原料中天然存在的糖，也包括在生产过程中额外添加的糖类成分。

本政策建议书将系统分析当前健康消费与饮品行业发展现状，借鉴国际先进经验，梳理国内政策实施成效与不足，分享天丝集团的实践探索，最终提出针对性政策建议，以期推动健康饮品行业提质升级，激活健康消费市场潜力，为健康中国建设注入更强动能，助力中外企业在华实现更高质量的共赢发展。

一、现状：健康饮品行业进入“量质齐升”的关键转型期

（一）市场扩容与结构升级并行，激活内需新动能

在居民可支配收入稳步增长、全民健康意识全面觉醒及国家战略精准引导的多重驱动下，中国健康消费市场正经历从规模扩张到品质升级的深刻变革。作为快消领域与民生福祉紧密关联的核心板块，饮品行业的健康化转型尤为迅猛。

根据 2025 年一项对上海市民的调查，超五成（53.4%）市民偏好低糖饮料或无糖饮料⁴。消费数据显示，2024 年国内饮料行业稳健增长，其中，功能饮料（含能量饮料、运动饮料）细分赛道凭借精准的需求适配，实现了约 12% 的增速，高于行业平均水平⁵。消费结构正从“泛功能化”向“精准功能化”迭代，低糖/无糖、天然原料溯源、特定营养素强化（如电解质、维生素、益生元等）已成为企业产品创新的核心锚点，呼应了大众从“追求温饱”到“追求健康”的消费需求升级趋势。

（二）消费场景多元化与人群细分化，重构市场新生态

健康饮品的消费边界已突破传统运动补给的单一场景，融入职场提神、学习专注、户外休闲、日常轻养生等多元高频生活场景，成为大众健康生活方式的重要组成部分。

⁴ 中新网上海.“调查：上海超五成民众会选择无糖或低糖饮料-中新社上海.” 2025 年 9 月 4 日.

⁵ 第一财经.“年度盘点|2024 年饮料健康化仍在提速，头部企业加速扩产.” 2025 年 1 月 3 日.

相应的，消费人群从核心易疲劳的工作者，逐步拓展至运动健身爱好者、注重精力管理的职场人士，以及追求轻负担生活方式的新中产家庭。场景与人群的双重升级与细分，催生了差异化消费需求，激励企业持续创新，推动行业从“产品供给”向“需求定制”转型。

（三）产业投资与价值链升级，夯实发展新根基

伴随行业转型加速，头部企业纷纷加大在华研发与生产布局力度，通过建设区域总部、高端研发中心及智能化生产基地，加强本土化发展。以天丝集团为代表，近五年在华累计投资额已超 40 亿元人民币，持续加码研发创新与产业链建设。行业投资重心已从传统产能扩张，转向研发创新、全链条质量管控与可持续发展能力建设，标志着健康饮品行业正加速向价值链高端攀升，为长期高质量发展筑牢产业根基，也彰显了外资企业对中国市场的长期信心。

二、核心挑战：从高速增长转向高质量发展面临的四重瓶颈

（一）创新瓶颈：基础研究与转化应用脱节，制约核心竞争力

当前食品饮料行业创新仍存在“重营销轻研发”“重形式轻内核”的结构性短板。企业倾向于将资源集中于产品风味、包装设计、营销概念的快速迭代，而在核心功效验证、作用机理等领域投入相对不足。产学研协同机制尚不够完善，高校与科研院所的前沿科研成果难以高效转化为市场认可的成熟产品，创新链条存在断裂。中小企业受资金、人才双重制约，研发创新能力较为薄弱，易陷入同质化竞争格局，进一步挤压行业创新空间，不利于行业核心竞争力的整体提升。

(二) 监管瓶颈：健康声称管理与市场创新不同步，需进一步政策引导与规范

现行食品安全标准体系已有效筑牢产品基本安全底线，但面对快速迭代的消费场景、营销手段，对健康声称、功能声称的管理仍然进一步需要政策的及时引导和有效规范。这一现状使得市场推广存在部分模糊空间。例如，某厂商宣传其饮料产品具有“提高免疫力、改善亚健康”的功效，某厂商在其益生菌产品上标注“三甲医院专家推荐”等字样。类似的营销手法既可能影响消费者权益，也不利于真正投入研发、深耕品质的企业的创新价值获得市场认可，一定程度上影响了企业实质性创新的积极性。因此，对于食品饮料行业相关声称的日常管理、监督执法等工作仍需协同完善，以更好适配行业创新发展节奏。

(三) 认知瓶颈：消费者信息不对称，理性健康消费引导不足

消费者行为洞察公司尼尔森 IQ 调研显示，71%的消费者在选购食品饮料时会研究产品的成分与营养功效。⁶然而，市场上各类钻空子式的营销宣传，显著抬高了消费者分辨和甄别的门槛。食品饮料广告要传播正确的消费信息和科学的健康知识，目前而言，公共传播领域亟需科学、可信的、通俗易懂的公共信息指引平台，以便有效破解信息不对称难题。上述因素导致部分消费者的消费决策易受不当甚至错误的营销影响，科学、理性的健康消费文化尚未完全形成，在一定程度上制约了健康消费市场的良性循环。

(四) 协同瓶颈：产业链现代化水平不均，制约整体效能提升

从全产业链视角看，行业现代化水平尚不均衡。上游环节，优质原料的标准化种植、规模化供应体系尚不完善，供应能力不稳定，直接影响终端产品品质的一致性与稳定性；中游生产环节，企业间智能化、绿色化水平差距

⁶ 尼尔森 IQ. “2025 大饮食行业消费者心智及决策链路研究白皮书.” 2025 年 7 月 30 日.

显著，部分中小企业受技术、成本制约，缺乏技术研发能力，仍沿用传统生产模式，效率与环保水平有待提升；⁷下游渠道环节，线上线下全渠道融合不够深入，存在产品信息不一致、消费体验割裂等问题。整体来看，产业链各环节的数字化协同能力、绿色低碳转型进度及综合运营效率仍有较大提升空间，现有发展水平难以充分适配行业高质量发展需求。

三、国际镜鉴：健康消费领域监管与发展的多元实践

（一）欧盟：科学证据+统一管控，构建严格健康声称管理体系

欧盟《食品营养与健康声称法规》构建了较为严格、规范的健康声称管理框架，其核心要义在于“科学证据、统一管控”。该法规明确规定，任何健康声称必须有足够的科学依据和共识，企业有责任提供证据。这些声称需经过欧洲食品安全局（EFSA）的系统评估和授权，并被纳入欧盟统一清单，方可使用。⁸

这一制度不仅保障了市场信息的科学性与真实性，为消费者提供了高可信度的决策依据，更指引企业将资源聚焦于扎实的基础研究与功效验证，从源头提升产业核心竞争力，为我国构建科学的声称管理体系提供了借鉴。

（二）新加坡：分级标识+源头引导，推动饮料行业健康化转型

2022年12月30日起，新加坡健康促进局强制推行的饮料“Nutri-Grade”分级标签制度，依据糖、饱和脂肪含量，将饮料（含冲泡饮料、自动咖啡机

⁷ 新京报。“全国人大代表张学武：加强食品产业数字化标签普及应用。”2026年3月5日。

⁸ European Union. “Regulation (EC) No 1924/2006 of the European Parliament and of the Council of 20 December 2006 on Nutrition and Health Claims Made on Foods.” *Official Journal of the European Union* L 404 (December 30, 2006): 9–25. Consolidated version 2014.

现制饮品等)划分为 A 级(最健康)至 D 级(最不健康)四个等级,要求生产商将其标注在外包装上。同时,限制评级为 D 的饮料的广告传播。⁹

该制度将复杂的营养信息转化为直观的视觉信号,既高效引导消费者理性选择,又倒逼产业界主动开展产品配方改良,推动行业向健康化转型。目前,上海市依据非乳源性糖、饱和脂肪、反式脂肪、非糖甜味剂含量制定的“营养选择”分级标识正在试行中,¹⁰为本土制度构建积累了宝贵实践经验。

(三) 泰国: 税收手段 + 全民参与, 构建饮品减糖与健康引导体系

2015 年,泰国政府发现泰国人平均每天摄取约 104 克糖,是世界卫生组织建议摄入量上限的 4 倍,其中大部分来自含糖饮料。¹¹

为了解决糖摄入过量的问题,泰国政府从 2017 年开始分三个阶段对预包装含糖饮料征收“糖税”,具体标准如下:含糖量小于 6 克/100 毫升的饮品免征糖税;针对每 100 毫升含糖量在 6 克至 18 克之间的饮品,第一阶段(2017 至 2019 年)征收每升 0.1 泰铢至 1 泰铢不等的梯级税费,在第二阶段(2019 年至 2021 年)该区间上升至每升 0.1 泰铢至 5 泰铢。2025 年,分阶段机制将全部完成,对含糖量高于 14 克/100 毫升的饮品,将征收 5 泰铢/升的“糖税”。¹²

该计划实施以来取得了积极的成效。2021 年,泰国低糖饮料的销量较 2017 年增长了 35%,国民每日糖摄入量则从最高点下降了约 20 克。¹³这一税率与含糖量挂钩的方案通过经济激励措施,鼓励企业改进产品配方,并推动整个饮料行业向低糖化方向转型。

⁹ Ministry of Health Singapore. “Rollout of Nutri-Grade Mark on 30 December 2022.” News release, November 29, 2022.

¹⁰ 上海疾控. “上海饮料‘分级’, 该怎么选一目了然。” 2024 年 3 月 26 日.

¹¹ Nipaporn Urwannachotima et al., “Impact of sugar-sweetened beverage tax on dental caries: a simulation analysis.” BMC Oral Health, Mar 18, 2020.

¹² 石雁茹. “我国含糖饮料消费税制度设计: 依据、国外借鉴与总体构想.” *社会企业经济发展* 1, 第 5 期 (2024): 145-149.

¹³ Johjit, Krajangwit. “ThaiHealth Alarms Over Excessive Sugar Consumption.” NBT World, February 12, 2024.

四、本土实践：天丝集团在中国的创新探索与生态共建

（一）产品创新：以全球化研发适配本土需求，引领健康潮流

坚持“全球化研发+本土化适配”的创新路径，精准对接中国消费者对低糖健康产品的偏好，推出零糖果味维生素能量饮料，兼顾轻负担需求与丰富口感，契合当下健康消费趋势。同时，立足消费者使用便利性，拓展产品应用场景，推出瓶装能量饮料，进一步优化使用体验，适配多场景能量补给需求。所有产品均遵循全球统一的质量与安全标准，品质稳定可控，为行业产品健康化升级提供了实质性的创新示范，推动能量饮料赛道向清洁配方、健康适配的方向发展。

（二）产业链建设：以全链条赋能协同发展，构建生态闭环

突破单一生产布局局限，聚焦构建可持续、共成长的产业生态，通过全链条协同赋能，实现价值共创。在上游环节，推动关键原料本地化采购与国际标准对接，依托完善的产业配套体系，实现供应链高效协同，保障原料品质与供应稳定性；在中游环节，导入先进的生产管理体系与环保技术，带动制造业绿色升级，践行“双碳”目标，其中现代化智能生产基地配备多条智能生产线，年产能可观，另一生产基地依托区位优势，成为连接中国与东盟市场的关键供应链节点，强化区域供应链联动；在下游环节，运用数字化工具打通线上线下渠道壁垒，提升全渠道运营效率与消费体验一致性，实现产业链各环节协同发展。全产业链布局已通过数字化手段在 2025 年中国国际供应链促进博览会（链博会）上全面展示，为行业产业链升级提供参考范式。

（三）理念倡导：以负责任教育传递健康理念，践行社会责任

以传递健康、积极的生活方式为核心，将全民健康素养提升融入理念倡导全过程，助力“健康中国”目标实现。通过赞助健康生活方式活动与体育运动，如中国大学生篮球联赛（CUBAL）、国内多项马拉松赛事及商学院沙

漠挑战赛等，其中沙漠挑战赛优胜者还受邀参与国际马拉松赛事，以体育为载体接力健康生活理念，贴合当下年轻人对运动健康的追求。此外，通过举办音乐节、赞助中外文化交流活动等形式，在传递健康生活理念的同时，推动人文交流，让健康理念更广泛地渗透到日常生活场景中，助力全民健康生活方式的养成。

五、政策建议：构建“创新—监管—消费—生态”四位一体的支持体系

为系统性破解上述行业发展瓶颈，推动健康饮品产业高质量发展，更好发挥其在激活内需、赋能民生、培育新质生产力中的重要作用，我们围绕以下四个维度，提出构建协同发力、系统完备的支持体系的建议：

（一）强化创新引擎：建立以科学为导向的研发激励与转化机制

- 将能量饮料、电解质饮料生产及加工相关产业纳入《鼓励外商投资产业目录》，同步配套实施研发费用加计扣除阶梯式优惠政策。对企业基础研究、临床试验等高投入、长周期的核心研发环节发生的支出，给予更高比例加计扣除政策支持，以此强化对企业实质性研发活动的激励导向，引导企业将各类资源进一步向核心技术创新领域集聚，助力健康饮品产业以技术驱动实现高质量发展。
- 探索建立“政府指导、市场主导、产学研协同”的健康食品产业创新支持机制。通过设立健康食品创新引导基金或鼓励龙头企业牵头成立产业创新联合体的方式，发挥政府资金的杠杆作用和政策引导作用，吸引社会资本共同投入。此举旨在构建多元化的科技投入体系，避免政府直接介入微观市场活动，而是通过指导监督、风险分担等方式，引导资源向核心技术领域集聚。该机制聚焦功能因子挖

掘、功效机理研究、人体循证试验等前沿基础与应用基础研究，重点支持新原料、新工艺、新剂型研发，精准填补行业基础研究短板，为产业创新提供源头支撑。

- **规范管理并逐步推广“龙头企业+政府平台+科研院所”的联合创新模式。**通过多方协同创新模式，整合企业的市场化洞察能力、政府的资源协调能力、以及科研机构的技术储备，打造开放的行业创新赋能平台。其研究成果（如功能验证、评价标准、检测方法等）将作为行业公共产品，降低中小企业创新成本与风险，打通创新成果转化“最后一公里”，形成“研发—转化—产业化”的良性循环。

（二）完善监管框架：构建清晰、科学、高效的现代化治理模式

- **强化市场监管，筑牢消费安全底线。**聚焦虚假宣传、误导性健康声称、假冒伪劣、标签虚假标注等突出问题，强化对企业的审查机制，要求企业提供切实可信、依据明确的声称证据。健全的信用监管体系，加大对网络平台、个体零售商等渠道的产品监管力度，减小假冒伪劣商品的社会影响，对失信企业实行跨部门联合惩戒，提高违法成本。通过“事前预防、事中监管、事后严惩”的全链条监管格局，维护公平有序的市场环境和消费者权益。
- **探索建立“功能性标示食品备案制度”。**参考国际经验，在风险可控品类中，试行以企业主体责任为核心、科学证据为支撑的事后备案管理模式。根据最新研究成果和国际经验，动态调整备案原料目录范围，将安全风险低、效果得到实证、产业基础好的原料纳入备案管理，缩短创新产品上市周期，激发市场创新活力。

（三）优化消费环境：实施以消费者为中心的引导与保护策略

- **促进多业态融合，打造“健康+文体旅”消费场景。**鼓励健康饮品

与运动健身、文化旅游、办公服务等业态深度融合，推动健康消费融入日常生活。建议支持健康饮品企业与健身房、运动场馆等线下场景及各类体育赛事合作，推出场景化产品与服务，打造长期稳定的“健康+运动”场景；与景区、酒店、文旅项目合作，开发结合地域特色的健康饮品，打造“健康+文旅”场景，满足游客的健康消费需求；与写字楼、企业园区合作，设立健康饮品体验区，提供定制化健康饮品服务，打造“健康+办公”场景。同时，政府可通过财政补贴、场地支持、政策引导等方式，鼓励企业开展场景化创新，培育一批健康消费示范场景与示范企业，发挥引领带动作用，充分释放健康消费市场潜力。

- **更大范围内试行并逐步推广“饮料营养分级标识”制度。**借鉴新加坡的经验和上海的试点成果，制定符合中国居民营养健康要求的分级标准。该标准以添加糖、饱和脂肪、反式脂肪和非糖甜味剂为主要评估指标，要求在食品包装的明显位置进行标示，帮助消费者快速做出健康选择，同时敦促企业改进配方，推动行业的健康化升级。

（四）培育产业生态：推动全链条协同升级与高水平开放合作

- **提升外资企业参与度，深化高水平对外开放。**在标准层面，进一步畅通外资企业参与国家标准、行业标准制修订的渠道，邀请外资企业技术专家进入标准化技术委员会；在创新层面，鼓励外资在华设立研发中心，在进口设备免税、研发费用加计扣除等方面给予与本土企业同等的政策支持待遇，融入国家创新体系；在产业层面，充分发挥外资在全球研发、标准制定、产业链管理方面的经验优势，通过组织产业链供需对接等活动，推动技术与经验共享，实现内外资企业协同创新、共同发展，以制度型开放赋能产业高质量发展。
- 探索建立适应食品饮料行业的“包容审慎、风险可控”的监管与服务

务机制。对新业态、新产品，在严守安全底线前提下，建立沙盒监管（包容审慎的创新监管模式）或行政指导机制。向企业明确沙盒准入条件与测试期限，允许企业在产品原料、营养补充剂、风味等限定范围内进行市场验证，赋予其合理的试错空间。同步建立“事前沟通、事中动态观察、事后效果评估”的全流程服务：事前设立咨询窗口，鼓励前置沟通，减少企业合规成本；事中依托风险监测平台，实施动态观察与预警；事后开展效果评估，将成熟经验转化为标准制修订依据。同时，严守食品安全底线，实行安全性评估前置，并建立风险熔断机制，一旦出现重大安全隐患立即终止测试。通过这一机制，在确保安全的前提下，为行业创新留足探索空间。

六、结论与展望

推动健康消费高质量发展，绝非单一主体之力可及，需要政府、产业界、学术界与消费者形成多方合力、同向发力：政府通过“智慧监管”划定合规边界、完善制度供给，筑牢产业发展的制度根基；产业界通过“实质性创新”提供优质产品、筑牢品质防线，激活产业发展的核心动能；学术界通过“前沿探索”强化科学支撑、破解技术瓶颈，夯实产业发展的科技底座；消费者通过理性选择督促产业升级、引领市场导向，营造产业发展的良好生态。

中国市场的巨大潜力与持续优化的营商环境，始终是天丝集团在华深耕发展的信心所在。作为红牛品牌的创始企业，天丝集团深耕中国市场三十余年，始终以“赋能全民健康活力”为初心，持续以产品创新与产业实践推动健康生活方式普及，聚焦健康能量饮品赛道精耕细作，凭借深厚的品牌积淀、领先的技术优势与本土化创新实践，深度融入中国健康消费市场生态，更作为中国功能饮料行业最具影响力的外资龙头企业之一，引领行业规范化、健

康化发展，推动中国能量饮品赛道从培育走向成熟、从单一走向多元。

未来，天丝集团将继续以长期主义姿态扎根中国、深化投资，充分发挥全球研发资源、品牌运营经验优势，持续提升可持续发展能力，与中国合作伙伴携手并肩，积极参与健康饮品产业生态共建，共同推动行业迈向更科学、更透明、更可持续的发展新阶段，为“健康中国”宏伟目标的实现，为中国经济高质量发展注入源源不断的产业活力与消费动能。

Activating Healthy Consumption to Boost the Healthy China Initiative

*TCP Group*¹

Executive Summary

The 15th Five-Year Plan Outline calls for accelerating the construction of the Healthy China Initiative, with the consensus that “placing the people’s health at a strategic priority for development” is also shared across society. As a powerful engine for stimulating domestic demand and empowering people’s livelihoods, healthy consumption is shifting from an “optional choice” to an “essential need.” The market is continuously expanding, and the consumption structure is upgrading. Consumer demand for healthy beverages² has evolved from basic replenishment to diverse needs for nutritional suitability, scenario-specific products, and green, low-carbon options. As an important segment of the healthy consumption sector, the healthy beverage industry not only bears the social value of meeting the nation’s health needs but also shoulders the industrial mission of promoting the high-quality development of the consumer goods industry. The sector is embracing new development opportunities in innovation and scenario expansion and has become a key arena for both Chinese and foreign enterprises to deepen their presence in China and share in the dividends of development.

TCP Group has always regarded the Chinese market as a core strategic market. Upholding the vision of bringing outstanding products and services to consumers worldwide, we continue to invest in product R&D, business model innovation, and

¹ The views expressed in this report are those of the enterprise research and do not represent the official stance or opinions of the forum host and organiser.

² The term “health beverages” as used in this article refers broadly to beverage products designed to meet health-conscious consumer needs and that offer certain health benefits in terms of formulation, nutritional composition, or functional properties. This category primarily includes low-sugar or sugar-free beverages, functional beverages, sports drinks, plant-based beverages, and nutrient-enriched beverages fortified with vitamins or minerals; it does not include alcoholic beverages.

social responsibility initiatives. By leveraging our global R&D network, we drive localized innovation that meets the evolving health needs of Chinese consumers. This has led to the launch of low- and zero-sugar³ products, as well as functionally extended beverages, helping to lead the upgrade of the healthy energy drink segment. We have built an omni-channel consumer service network covering online and offline, urban and rural areas, and have collaborated with upstream and downstream industrial chains to empower small and medium-sized enterprises, helping healthy consumption reach a wider range of regions and groups. We actively fulfill our corporate social responsibility as a foreign-invested enterprise, deeply engaging in areas such as national fitness, health science popularization, and green, low-carbon initiatives to promote health concepts. Based on this, this policy position paper will systematically analyze the current state of healthy consumption and the beverage industry, draw on advanced international experience, review the effectiveness and shortcomings of domestic policy implementation, share TCP Group’s explorations, and ultimately propose targeted policy suggestions. Our goal is to promote the quality and upgrading of the healthy beverage industry, unlock the potential of the healthy consumption market, inject stronger momentum into the construction of a Healthy China, and support Chinese and foreign enterprises to achieve higher-quality, mutually beneficial development.

1. Current Situation: The Healthy Beverage Industry Enters a Key Transition Period of Simultaneous Growth in Quantity and Quality

1.1 Simultaneous Market Expansion and Structural Upgrading, Activating New Momentum for Domestic Demand

Driven by the steady growth of residents’ disposable income, a comprehensive awakening of national health consciousness, and precise guidance from national strategies, China’s healthy consumption market is undergoing a profound

³ The term “sugar” as used in this document chiefly refers to monosaccharides and disaccharides in beverages that can be absorbed and utilized by the human body to produce energy, including glucose, fructose, sucrose, lactose, and maltose. These sugars include both those naturally present in raw materials and those added during the production process.

transformation from scale expansion to quality upgrading. As a core segment in the fast-moving consumer goods (FMCG) sector closely linked to public well-being, the healthy transformation of the beverage industry has been particularly rapid.

According to a 2025 survey among Shanghai residents, over half (53.4%) of the interviewed prefer low-sugar or sugar-free beverages.⁴ Consumption data shows that in 2024, the domestic beverage industry grew steadily. Among its sub-sectors, functional beverages (including energy drinks and sports drinks) achieved a growth rate of about 12%, higher than the industry average, thanks to better alignment with consumer demand.⁵ The consumption structure is evolving from “broadly functional” to “precisely functional.” Low-sugar/sugar-free options, traceability of natural ingredients, and fortification with specific nutrients (such as electrolytes, vitamins, probiotics, etc.) have become core anchors for corporate product innovation, echoing the evolving consumption trend from seeking subsistence to pursuing health.

1.2 Diversification of Consumption Scenarios and Segmentation of Consumer Groups, Reconstructing a New Market Ecosystem

The consumption boundaries of healthy beverages have expanded well beyond the traditional domain of sports replenishment. They are now integrated into diverse, high-frequency life scenarios, such as workplace refreshment, study focus, outdoor leisure, and daily light wellness, establishing themselves as an important component of modern healthy lifestyles.

Correspondingly, the consumer base has broadened from a core group of easily fatigued workers to include fitness enthusiasts, professionals focused on energy management, and new middle-class families seeking a lighter-burden lifestyle. This concurrent upgrading and segmentation of both consumption scenarios and consumer groups has given rise to increasingly differentiated demands. In response, it encourages enterprises to continuously innovate and evolve, shifting their role

⁴ China News Service Shanghai. “Survey: Over 50% of Shanghai Residents Choose Sugar-free or Low-sugar Beverages.” September 4, 2025.

⁵ Yicai. “Annual Review | Healthy Trend in Beverages Continued to Accelerate in 2024, Leading Companies Speed Up Capacity Expansion.” January 3, 2025.

from simply supplying products to customizing solutions based on specific consumer needs.

1.3 Industrial Investment and Value Chain Upgrading, Consolidating a New Foundation for Development

As the industry accelerates its transformation, leading enterprises have increased their R&D and production layouts in China, strengthening localization by establishing regional headquarters, high-end R&D centers, and intelligent production bases. Represented by TCP Group, cumulative investment in China over the past five years has exceeded RMB 4 billion, with continued emphasis on R&D innovation and industrial chain construction. The focus of industry investment has shifted from traditional capacity expansion to R&D innovation, full-chain quality control, and sustainable development capability building. This signifies that the healthy beverage industry is accelerating its climb up the value chain, laying a solid industrial foundation for long-term, high-quality development, and also demonstrating the long-term confidence of foreign-invested enterprises in the Chinese market.

2. Core Challenges: Four Bottlenecks in the Transition from High-Speed Growth to High-Quality Development

2.1 Innovation Bottleneck: Disconnect Between Basic Research and Application, Constraining Core Competitiveness

Currently, innovation of food and beverage industry still suffers from structural shortcomings, such as “prioritizing marketing over R&D” and “valuing form over substance.” Enterprises tend to concentrate resources on rapid iterations of flavoring, packaging design, and marketing concepts, while investment in scientific fields—such as efficacy verification of core functional ingredients and research on action mechanisms—is relatively insufficient. The industry-academia-research collaboration mechanism is not yet perfect, making it difficult to efficiently translate cutting-edge scientific research from universities and institutes into mature, market-accepted products, resulting in a fractured innovation chain. Small and

medium-sized enterprises (SMEs), constrained by both capital and talent, have weaker R&D and innovation capabilities, easily falling into homogenized competition, which further squeezes the space for industry innovation and is detrimental to the overall enhancement of the industry's core competitiveness.

2.2 Regulatory Bottleneck: Management of Health Claims Not Synchronized with Market Innovation, Requiring Further Policy Guidance and Standardization

The current food safety standard system has effectively established a basic safety bottom line for products. However, in the face of rapidly iterating consumption scenarios and marketing methods, the management of health and function claims still require timely policy guidance and effective regulation. This situation creates ambiguity in market promotion. For example, a manufacturer claims that its beverage product can “boost immunity” and “improve sub-health conditions.” Another manufacturer prints words such as “recommended by experts from top-tier hospitals” on its probiotic products. Such marketing can both harm consumer rights and prevent companies that genuinely invest in R&D and quality from having their innovative value recognized by the market. To some extent, this dampens the enthusiasm for substantive innovation. Therefore, the daily management and supervision of claims in the food and beverage industry need to be collaboratively improved to better adapt to the pace of industrial innovation and development.

2.3 Awareness Bottleneck: Information Asymmetry for Consumers and Insufficient Guidance for Rational Healthy Consumption

According to research by consumer behavior insights firm Nielsen IQ, 71% of consumers examine product ingredients and nutritional benefits when selecting food and beverages.⁶ While diverse promotional claims in the market have raised the threshold for consumers to distinguish and discern. Food and beverage advertising should disseminate correct consumption information and scientific health knowledge. There is currently an urgent need for a scientific, trustworthy,

⁶ NielsenIQ. “2025 F&B Industry Consumer Mindset and Decision-Making Journey Research White Paper.” July 30, 2025.

and easy-to-understand public information guidance platform in the public communication sphere to effectively resolve the problem of information asymmetry. These factors cause some consumers to make purchasing decisions based on improper or even erroneous marketing. A culture of scientific, rational, and healthy consumption has not yet fully formed, which restricts the virtuous cycle of the healthy consumption market to some extent.

2.4 Coordination Bottleneck: Uneven Modernization Across the Industrial Chain, Constraining Overall Efficiency Improvement

From a full industrial chain perspective, the level of modernization across the industry is uneven. In the upstream, the cultivation of high-quality raw materials and large-scale supply systems are underdeveloped. This results in an unstable supply capacity, which directly impacts the consistency and stability of the final product. In the midstream production segment, there are significant disparities in intelligent and green manufacturing levels among enterprises. Due to technological constraints and costs, some SMEs lack R&D capabilities and continue to rely on traditional production models, which leaves room for improvement in efficiency and environmental performance.⁷ In the downstream distribution channels, the integration of online and offline omnichannel strategies is superficial, resulting in inconsistent product information and fragmented consumer experiences. Overall, there is considerable room for improvement in digital collaboration capabilities, green and low-carbon transformation progress, and comprehensive operational efficiency across all segments of the industrial chain. The current level of development falls short of fully meeting the demand for high-quality industry advancement.

⁷ The Beijing News. “NPC Deputy Zhang Xuewu: Strengthen the Popularization and Application of Digital Labeling in the Food Industry.” March 5, 2026.

3. International Benchmarks: Diverse Practices in the Regulation and Development of Healthy Consumption

3.1 European Union: Scientific Evidence + Unified Control, Building a Strict Health Claim Management System

The EU regulations on *Nutrition and Health Claims Made on Foods* have established stringent and standardized frameworks for managing health claims. Its core principle is “scientific evidence and unified regulation.” The regulation explicitly states that any health claim must be supported by sufficient scientific evidence and consensus, and companies are responsible for providing this evidence. These claims must undergo systematic evaluation and authorization by the European Food Safety Authority (EFSA) and be included in a unified EU list before they can be used.⁸

This system not only ensures the scientific validity and truthfulness of market information, providing consumers with a highly credible basis for decision-making, but also guides companies to focus their resources on solid basic research and efficacy verification. This enhances the industry’s core competitiveness from the source and offers a valuable reference for China in building a scientific claim management system.

3.2 Singapore: Nutri-Grade Labeling + Guidance from the Source, Promoting the Healthy Transformation of the Beverage Industry

Starting December 30, 2022, the Singapore Health Promotion Board made the “Nutri-Grade” labeling system for beverages mandatory. Based on sugar and saturated fat content, beverages (including freshly prepared drinks and those from automatic coffee machines) are graded from A (healthiest) to D (least healthy), and manufacturers are required to display this on the packaging. Additionally, advertising for D-grade beverages is restricted.⁹

⁸ European Union. “Regulation (EC) No 1924/2006 of the European Parliament and of the Council of 20 December 2006 on Nutrition and Health Claims Made on Foods.” Official Journal of the European Union L 404 (December 30, 2006): 9–25. Consolidated version 2014.

⁹ Ministry of Health Singapore. “Rollout of Nutri-Grade Mark on 30 December 2022.” News release, November 29, 2022.

This system translates complex nutritional information into an intuitive visual signal, which both efficiently guides consumers to make rational choices and pressures the industry to proactively reformulate products, driving the industry's transformation towards healthier options. Currently, Shanghai is piloting a graded labeling system based on non-dairy-source sugar, saturated fat, trans fat, and non-sugar sweetener content,¹⁰ accumulating valuable experience for the construction of a local system.

3.3 Thailand: Tax Measures + Public Participation, Building a System for Sugar Reduction and Health Guidance in Beverages

In 2015, the Thai government found that the average Thai person consumed about 104 grams of sugar per day, four times the upper limit recommended by the World Health Organization, with most of it coming from sugary drinks.¹¹

To address the problem of excessive sugar intake, the Thai government began levying a “sugar tax” on pre-packaged sugary drinks in three phases starting in 2017. The specific standards are as follows: beverages with less than 6 grams of sugar per 100 ml are exempt from the tax. For beverages with sugar content between 6 and 18 grams per 100 ml, a tiered tax ranging from 0.1 to 1 THB per liter was imposed in the first phase (2017-2019), which increased to 0.1 to 5 THB per liter in the second phase (2019-2021). By 2025, the phased mechanism will be fully implemented, and beverages with a sugar content higher than 14 grams/100 ml will be taxed at 5 THB/liter.¹²

The plan has achieved positive results since its implementation. In 2021, sales of low-sugar beverages in Thailand increased by 35% compared to 2017, and the national daily sugar intake decreased by about 20 grams from its peak.¹³ This scheme, which links tax rates to sugar content, uses economic incentives to

¹⁰ Shanghai CDC. “Shanghai Beverage ‘Grading’, How to Choose is Clear at a Glance.” March 26, 2024.

¹¹ Nipaporn Urwannachotima et al., “Impact of sugar-sweetened beverage tax on dental caries: a simulation analysis.” *BMC Oral Health*, March 18, 2020.

¹² Shi, Yanru. “Design of China’s Sugar-Sweetened Beverage Consumption Tax System: Basis, Foreign Experience, and Overall Conception.” *Social Enterprise Economic Development* 1, no. 5 (2024): 145-149.

¹³ Johjit, Krajangwit. “ThaiHealth Alarms Over Excessive Sugar Consumption.” *NBT World*, February 12, 2024.

encourage companies to improve product formulations and pushes the entire beverage industry towards a low-sugar transformation.

4. Local Practices: TCP Group’s Explorations and Ecosystem Co-construction in China

4.1 Product Innovation: Adapting Global R&D to Local Needs, Leading Health Trends

Adhere to the innovation path of “global R&D + local adaptation,” our group meets Chinese consumers’ preference for low-sugar and healthy products and launched sugar-free fruity vitamin energy drinks that balance the needs of light burden and rich taste, conforming to the current healthy consumption trend. At the same time, bottled energy drinks were released to improve convenience and user experience, as well as expand product application scenarios. All products comply with the group’s global unified quality and safety standards, ensuring stable and controllable quality, providing a substantial innovative model for the healthy upgrading of industry products, and promoting the energy drink track towards the direction of clean formulas and healthy adaptation.

4.2 Industrial Chain Construction: Empowering Collaborative Development Across the Full Chain, Building a Closed-Loop Ecosystem

The Group’s full industrial chain layout breaks through the limitations of a single production model, focusing on building a sustainable and co-growing industrial ecology and achieving value co-creation through full-chain collaborative empowerment. In the upstream link, this layout promotes the localization of key raw material procurement and alignment with international standards, relying on an improved industrial supporting system to achieve efficient supply chain collaboration and ensure raw material quality and supply stability. In the midstream link, it introduces advanced production management systems and environmental protection technologies to drive the green upgrading of the manufacturing industry and practice the *dual carbon* goal. Within this framework, a modern intelligent production base operates multiple intelligent production lines with considerable

annual output, while another base, leveraging its location advantages, has become a key supply chain node connecting the Chinese and ASEAN markets, strengthening regional supply chain linkages. In the downstream link, digital tools are employed to break down barriers between online and offline channels, improving full-channel operational efficiency and consumer experience consistency, thereby realizing coordinated development across all industrial chain segments. This comprehensive industrial chain layout was fully demonstrated through digital means at the 2025 China International Supply Chain Promotion Expo (CISCE), providing a reference model for industry-wide industrial chain upgrading.

4.3 Concept Advocacy: Conveying Health Concepts Through Responsible Education, Fulfilling Social Responsibility

Our groups spirits are centered on conveying a healthy and positive lifestyle, integrating the improvement of national health literacy into every stage of our outreach efforts to help achieve the goal of Healthy China. These activities include sponsoring healthy lifestyle programs and sports events, such as the Chinese University Basketball Association (CUBAL), numerous domestic marathon events, and business school desert challenges. Among these initiatives, winners of the desert challenge are invited to participate in international marathon events, using sports as a vehicle to relay healthy living concepts, which aligns with the current young generation's enthusiasm for sports and wellness. Furthermore, through hosting music festivals and sponsoring Sino-foreign cultural exchange activities, our initiatives continue to convey healthy living concepts while fostering cultural exchange. This multifaceted approach enables health concepts to permeate more broadly into daily life scenarios, contributing to the cultivation of a national healthy lifestyle.

5. Policy Recommendations: Building a Four-in-One Support System for “Innovation-Regulation-Consumption-Ecosystem”

To systematically address the development bottlenecks stated above, a coordinated policy approach is needed. This will promote the high-quality development of the healthy beverage sector. It will also better leverage the industry’s important role in stimulating domestic demand, empowering people’s livelihoods, and cultivating new quality productive forces. To achieve these goals, we propose building a comprehensive policy support system around the following four dimensions:

5.1 Strengthening the Innovation Engine: Establishing a Science-Oriented R&D Incentive and Transformation Mechanism

- **Include industries related to the production and processing of energy drinks and electrolyte beverages in the *Catalogue of Industries for Encouraged Foreign Investment*, and simultaneously implement a tiered preferential policy for the super deduction of R&D expenses.** Provide a higher deduction ratio for expenses incurred by enterprises in high-investment, long-cycle core R&D activities such as basic research and clinical trials. This will strengthen the incentive for substantive R&D activities, guide enterprises to further concentrate resources on core technology innovation, and help the healthy beverage industry achieve high-quality development driven by technology.
- **Explore the establishment of a government-guided, market-led, industry-academia-research-collaborated innovation support mechanism for the healthy food industry.** By setting up a healthy food innovation guidance fund or encouraging leading enterprises to take the lead in forming industrial innovation consortia, leverage the role of government funds and policy guidance to attract social capital. This aims to build a diversified technology investment system, avoiding direct government intervention in micro-market activities, and instead guiding resources towards core technology fields through guidance, supervision, and risk-sharing. This mechanism should focus on cutting-edge basic and applied research such as the discovery of functional

factors, research on efficacy mechanisms, and human clinical trials, with a key focus on supporting the R&D of new ingredients, new processes, and new formulations to precisely fill the industry’s basic research gaps and provide source support for industrial innovation.

- **Standardize and gradually promote a joint innovation model of “leading enterprises + government platforms + research institutes.”** Through this multi-party collaborative innovation model, integrate the market insight of enterprises, the resource coordination ability of the government, and the technological reserves of research institutions to create an open industry innovation empowerment platform. Its research outcomes (such as function verification, evaluation standards, testing methods, etc.) will serve as public goods for the industry, reducing the innovation costs and risks for SMEs, clearing the last mile for the transformation of innovation results, and forming a virtuous cycle of “R&D - transformation - industrialization.”

5.2 Improving the Regulatory Framework: Building a Clear, Scientific, and Efficient Modern Governance Model

- **Strengthen market supervision to firmly establish the bottom line for consumer safety.** Focus on prominent issues such as false advertising, misleading health claims, counterfeit and shoddy goods, and false labeling. Strengthen the review mechanism for enterprises, requiring them to provide credible and well-founded evidence for their claims. Improve the credit-based supervision system, increase supervision of products in channels like online platforms and individual retailers to reduce the social impact of counterfeit goods, and implement joint cross-departmental punishment for dishonest enterprises to increase the cost of violations. Establish a full-chain regulatory pattern of “pre-event prevention, in-event supervision, and post-event strict punishment” to maintain a fair and orderly market environment and protect consumer rights.
- **Explore the establishment of a “food filing system for functional labeling.”** Drawing on international experience, pilot a post-market filing management model centered on corporate responsibility and supported by scientific

evidence for categories with controllable risks. Dynamically adjust the scope of the filing raw material catalog based on the latest research findings and international experience, incorporating raw materials with low safety risks, proven effects, and a good industrial base into the filing management. This will shorten the time-to-market for innovative products and stimulate market innovation vitality.

5.3 Optimizing the Consumption Environment: Implementing Consumer-Centric Guidance and Protection Strategies

- **Promote the integration of multiple business formats to create “Health + Culture, Sports, and Tourism” consumption scenarios.** Encourage the deep integration of healthy beverages with sports and fitness, cultural tourism, and office services to promote the integration of healthy consumption into daily life. It is recommended to support healthy beverage companies in collaborating with offline venues like gyms and sports stadiums, as well as various sports events, to launch scenario-based products and services, creating long-term, stable “Health + Sports” scenarios. Collaborate with scenic spots, hotels, and cultural tourism projects to develop healthy beverages with regional characteristics, creating “Health + Cultural Tourism” scenarios to meet the health consumption needs of tourists. Cooperate with office buildings and corporate parks to set up healthy beverage experience zones, providing customized healthy beverage services and creating “Health + Office” scenarios. At the same time, the government can encourage enterprises to carry out scenario-based innovation through fiscal subsidies, site support, and policy guidance, cultivating a batch of demonstration scenarios and enterprises for healthy consumption to play a leading and driving role, fully unleashing the potential of the healthy consumption market.
- Pilot and gradually promote a “Beverage Nutrition Grade Labeling” system on a larger scale. Drawing on Singapore’s experience and pilot results in Shanghai, formulate grading standards that meet the nutritional and health requirements of Chinese residents. This standard should use added sugar, saturated fat, trans fat, and non-sugar sweeteners as the main evaluation indicators, requiring clear

labeling on the prominent part of food packaging to help consumers make quick, healthy choices, while also urging enterprises to improve formulations and promote the healthy upgrading of the industry.

5.4 Cultivating the Industrial Ecosystem: Promoting Full-Chain Collaborative Upgrading and High-Level Open Cooperation

- **Enhance the participation of foreign-invested enterprises and deepen high-level opening-up.** At the standards level, further smooth the channels for foreign-invested enterprises to participate in the formulation and revision of national and industry standards, and invite technical experts from foreign-invested enterprises to join standardization technical committees. At the innovation level, encourage foreign-invested enterprises to establish R&D centers in China and grant them the same policy support as domestic enterprises in areas such as tax exemptions for imported equipment and super deductions for R&D expenses, integrating them into the national innovation system. At the industrial level, fully leverage the experience and advantages of foreign capital in global R&D, standard-setting, and industrial chain management. Through activities like organizing supply-demand matchmaking for the industrial chain, promote the sharing of technology and experience to achieve collaborative innovation and common development between domestic and foreign enterprises, empowering high-quality industrial development through institutional opening-up.
- **Explore the establishment of an “inclusive, prudent, and risk-controllable” regulatory and service mechanism adapted to the food and beverage industry.** Establish a regulatory sandbox (an inclusive and prudent innovation supervision model) or an administrative guidance mechanism for new business formats and products while strictly adhering to the safety bottom line. Clearly define the entry conditions and testing periods for the sandbox, allowing enterprises to conduct market validation within a limited scope for product ingredients, nutritional supplements, flavors, etc., giving them reasonable room for trial and error. Simultaneously, establish a full-process service of “pre-event communication, in-event dynamic observation, and post-event effect

evaluation”: set up a consultation window for pre-event communication to reduce compliance costs for enterprises; rely on risk monitoring platforms for dynamic observation and early warning during the process; and conduct post-event effect evaluations to transform mature experiences into a basis for standard formulation and revision. At the same time, strictly adhere to the food safety bottom line, require pre-assessment of safety, and establish a risk circuit-breaker mechanism to immediately terminate testing if major safety hazards arise. This mechanism reserves sufficient space for exploration while ensuring safety.

6. Conclusion and Outlook

The high-quality development of healthy consumption cannot be achieved by any single actor alone. A concerted effort from the government, industry, academia, and consumers is urgently needed. Through smart regulations, the government shall define compliance boundaries and improve institutional supply to lay the institutional foundation for industrial development. The industry should provide high-quality products and build a quality defense line through “substantive innovation,” activating the core momentum for industrial development. Academia should strengthen scientific support and overcome technical bottlenecks through “cutting-edge exploration,” solidifying the technological foundation for industrial development. Consumers should drive industrial upgrading and guide market orientation through rational choices, creating a favorable ecosystem for industrial development.

The vast potential of the Chinese market and its continuously improving business environment have always been the foundation of TCP Group’s long-term confidence in China. As the founder of the Red Bull brand, TCP Group has been deeply rooted in the Chinese market for over 30 years. Guided by our founding mission of “Empowering National Health and Vitality,” we remain committed to promoting healthy lifestyles through product innovation and industry practices. We focus intensively on the healthy energy drink segment. Leveraging our strong brand

heritage, technological leadership, and localized innovation, the Group has become deeply integrated into China's health consumption ecosystem. As one of the most influential foreign-invested enterprises in China's functional beverage industry, we have played a leading role in shaping the sector's standardized and healthy growth. Our efforts have helped transform China's energy drink market from an emerging category to a mature industry, and from a single-product focus to a diversified landscape.

Going forward, TCP Group will continue to take root in China with a long-term commitment. We will further expand our investments, fully utilize our global R&D resources and brand operation experience, and steadily enhance our sustainable development capabilities. In close collaboration with Chinese partners, we will actively contribute to building a healthy beverage industry ecosystem. Together, we will propel the sector toward a new stage defined by greater scientific rigor, transparency, and sustainability. This effort will contribute lasting industrial vitality and consumer momentum to the realization of the "Healthy China" vision and the high-quality growth of the national economy.