



# Processed Meat, Seafood and Alternatives To Meat in China

November 2025

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Processed seafood benefits from healthy image

### INDUSTRY PERFORMANCE

Processed meat, seafood and alternatives to meat suffers due to economic slowdown

Processed seafood sees demand supported by health and wellness trend

### WHAT'S NEXT?

Clean label and health claims are major innovations in processed meat and seafood

Rise of private labels in processed meat and seafood

Innovation focusing on convenience

### COMPETITIVE LANDSCAPE

Private label expansion

### CHANNELS

Foodservice volumes expected to grow

E-commerce channel continues expansion

### CATEGORY DATA

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Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

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## Staple Foods in China - Industry Overview

### EXECUTIVE SUMMARY

Private label gaining share while health is also in focus

### KEY DATA FINDINGS

### INDUSTRY PERFORMANCE

Maturity and economic conditions constrain growth

Demographic developments boost demand for breakfast cereals

### WHAT'S NEXT?

Maturity remains a key factor

Opportunities for health focused development

## COMPETITIVE LANDSCAPE

Strong private label presence

Stable competitive landscape

## CHANNELS

Diversification of preferred shopping destinations

Continued expansion of e-commerce

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