



## **Herbals & Naturals seeing increased use across largest consumer health markets globally**

### **London, UK**

Consumers in some of the largest healthcare markets globally are increasingly turning to herbal & natural medicines and supplements, fuelling a huge boom in sales of Herbals & Naturals, according to a new report from The Nicholas Hall Group.

The new Herbals & Naturals report found that 9 markets (Australia, Brazil, Canada, China, Germany, India, Italy, Japan, USA) together added US\$1,564mn in net sales in 2017, with China and USA the largest contributors. The combined Herbals & Naturals category in these markets totalled \$33bn in 2017, growing by 5.0%, well ahead of growth of allopathic medicines at just 3.0%.

Some of the factors driving this growth include health & wellness climbing up the list of consumer priorities and herbal & natural options gaining prominence thanks to being suitable for children and perceived as safer than allopathic options. With medicated ingredients increasingly scrutinised and restricted, consumer concerns have risen about the safety of conventional medicines. Herbals & naturals have an increasing reputation for efficacy, with scientific studies / clinical backing enhancing the standing of many H&N brands.

Probiotics form the single fastest-growing category among Herbals & Naturals (averaging +11% a year since 2013), driven by rising awareness of benefits, consumer focus on prevention, expansion into new niches and increasing segmentation. Positioning of many probiotics has evolved beyond well-established gastrointestinal health and immunity benefits into multiple areas, including women's health, mother & baby, metabolic, stress, healthy ageing, etc. Options for children are proving particularly popular.

Other growth areas include herbal & natural cough remedies (averaging +8% growth a year) and topical analgesics (+7% a year). Herbal & natural cough is enjoying a surge in demand, helped by safety concerns over allopathic options and restrictions placed on certain ingredients (DXM, codeine); plenty of launch

activity, with ivy extract, thyme and honey the key growth segments. Among pain gels & rubs, the efficacy of herbal & natural formulations is highlighted, many brands relying on trusted heritage, with celebrity endorsement critical in markets like Japan and USA. Menthol and camphor are common and popular ingredients, alongside methyl salicylate, comfrey, capsaicin and arnica. China is dominated by TCMs, India by ayurvedic remedies, while homeopathics are significant in Europe and USA.

The full report, ***Herbals & Naturals: Opportunities in a Vast & Dynamic Area of Consumer Health***, is available now and more details can be found here: <https://nicholashall.com/report/herbals-naturals>

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