

Heart Health

Exploring the OTC options

(186 pages)

Definitions & methodology

Executive summary (26 pages)

Overview

Cardiovascular diseases are the world's biggest killer

What are cardiovascular diseases?

Risk factors for cardiovascular diseases

Heart health in key markets – a growing issue globally

Wide array of OTC options for heart health

OTC heart health market – Overview

Global OTC systemic cardiovasculars sales 2012-16

Global OTC fish oils & omega-3 sales 2012-16

Global OTC CoQ10 supplements sales 2012-16

Global OTC garlic supplements sales 2012-16

OTCs for consumers with high blood pressure

Number of people taking Rx statins for cholesterol reduction is on the rise

Statins have failed to take off OTC

OTC cholesterol tests

Technology & heart health

What does the future hold for OTC heart health?

Global forecast OTC systemic cardiovasculars sales 2021-26

Gender divide among heart health OTCs narrowing

Global forecast OTC fish oils & omega-3 sales 2021-26

Global forecast OTC CoQ10 supplements sales 2021-26

Global forecast OTC garlic supplements sales 2021-26

Scientific studies could provide new routes to market growth

Systemic cardiovasculars (40 pages)

Category overview (5pp)

Global OTC systemic cardiovasculars sales 2012-16

3 key trends in systemic cardiovasculars

Global OTC systemic cardiovasculars sales by region 2016

Global leading OTC systemic cardiovasculars marketers 2016

Systemic cardiovasculars in Western Europe (8pp)

Western Europe OTC systemic cardiovasculars sales by country 2016

Germany leading OTC systemic cardiovasculars 2016

Germany OTC systemic cardiovasculars sales 2012-16

France OTC systemic cardiovasculars sales 2012-16

Italy OTC systemic cardiovasculars sales 2012-16

Italy leading OTC systemic cardiovasculars 2016

Belgium OTC systemic cardiovasculars sales 2012-16

Belgium leading OTC systemic cardiovasculars 2016

Spain OTC systemic cardiovasculars sales 2012-16

Spain leading OTC systemic cardiovasculars 2016

Finland OTC systemic cardiovasculars sales 2012-16

Systemic cardiovasculars in C&E Europe (5pp)

C&E Europe OTC systemic cardiovasculars sales by country 2016
Russia leading OTC systemic cardiovasculars 2016
Russia OTC systemic cardiovasculars sales 2012-16
Poland OTC systemic cardiovasculars sales 2012-16
Poland leading OTC systemic cardiovasculars 2016
Romania OTC systemic cardiovasculars sales 2012-16

Systemic cardiovasculars in North America (8pp)

North America OTC systemic cardiovasculars sales by country 2016
USA leading OTC systemic cardiovasculars 2016
USA OTC systemic cardiovasculars sales 2012-16
Brand case study: Berkeley Life Heart Health
Brand case study: HeartShape / Synstat
Canada OTC systemic cardiovasculars sales 2012-16
Canada leading OTC systemic cardiovasculars 2016

Systemic cardiovasculars in Asia-Pacific (4pp)

Asia Pacific OTC systemic cardiovasculars sales by country 2016
Japan leading OTC systemic cardiovasculars 2016
Japan OTC systemic cardiovasculars sales 2012-16
China OTC systemic cardiovasculars sales 2012-16
S Korea leading OTC systemic cardiovasculars 2016
Australia leading OTC systemic cardiovasculars 2016

Systemic cardiovasculars in Latin America (2pp)

Latin America OTC systemic cardiovasculars sales by country 2016
Argentina OTC systemic cardiovasculars sales 2012-16

Phytosterols (5pp)

Phytosterols a growing presence in OTC cholesterol management
Focus on phytosterols and stanols

Outlook (3pp)

Global forecast OTC systemic cardiovasculars sales 2021-26
Western Europe forecast OTC systemic cardiovasculars sales 2021-26
C&E Europe forecast OTC systemic cardiovasculars sales 2021-26
North America forecast OTC systemic cardiovasculars sales 2021-26
Asia-Pacific forecast OTC systemic cardiovasculars sales 2021-26
Latin America forecast OTC systemic cardiovasculars sales 2021-26

Fish oils & omega-3 (31 pages)

Category overview (3pp)

Global OTC fish oils & omega-3 sales 2012-16
3 key trends in fish oils & omega-3
Global OTC fish oils & omega-3 sales by region 2016
Global leading OTC fish oils & omega-3 marketers 2016

Fish oils & omega-3 in North America (7pp)

North America OTC fish oils & omega-3 sales by country 2016
USA OTC fish oils & omega-3 sales 2012-16
USA leading OTC fish oils & omega-3 brands 2016
Canada OTC fish oils & omega-3 sales 2012-16
Canada leading OTC fish oils & omega-3 brands 2016
Brand case study: MegaRed

MegaRed OTC sales 2012-16
MegaRed leading OTC markets 2016

Fish oils & omega-3 in Asia-Pacific (6pp)

Asia-Pacific OTC fish oils & omega-3 sales by country 2016
China OTC fish oils & omega-3 sales 2012-16
China leading OTC fish oils & omega-3 brands 2016
Australia OTC fish oils & omega-3 sales 2012-16
Australia leading OTC fish oils & omega-3 brands 2016
Japan OTC fish oils & omega-3 sales 2012-16
Japan leading OTC fish oils & omega-3 brands 2016
S Korea OTC fish oils & omega-3 sales 2012-16
Indonesia OTC fish oils & omega-3 sales 2012-16
India OTC fish oils & omega-3 sales 2012-16

Fish oils & omega-3 in Western Europe (5pp)

Western Europe OTC fish oils & omega-3 sales by country 2016
Norway OTC fish oils & omega-3 sales 2012-16
Norway leading OTC fish oils & omega-3 brands 2016
UK OTC fish oils & omega-3 sales 2012-16
UK leading OTC fish oils & omega-3 brands 2016
Sweden OTC fish oils & omega-3 sales 2012-16
Italy OTC fish oils & omega-3 sales 2012-16
Italy leading OTC fish oils & omega-3 brands 2016
Germany OTC fish oils & omega-3 sales 2012-16
France OTC fish oils & omega-3 sales 2012-16

Fish oils & omega-3 in Latin America (3pp)

Latin America OTC fish oils & omega-3 sales by country 2016
Brazil OTC fish oils & omega-3 sales 2012-16
Brazil leading OTC fish oils & omega-3 brands 2016
Colombia OTC fish oils & omega-3 sales 2012-16
Mexico OTC fish oils & omega-3 sales 2012-16

Fish oils & omega-3 in C&E Europe (3pp)

C&E Europe OTC fish oils & omega-3 sales by country 2016
Poland OTC fish oils & omega-3 sales 2012-16
Poland leading OTC fish oils & omega-3 brands 2016
Russia OTC fish oils & omega-3 sales 2012-16
Russia leading OTC fish oils & omega-3 brands 2016

Outlook (4pp)

Global forecast OTC fish oils & omega-3 sales 2021-26
North America forecast OTC fish oils & omega-3 sales 2021-26
Asia-Pacific forecast OTC fish oils & omega-3 sales 2021-26
Western Europe forecast OTC fish oils & omega-3 sales 2021-26
Latin America forecast OTC fish oils & omega-3 sales 2021-26
C&E Europe forecast OTC fish oils & omega-3 sales 2021-26

CoQ10 supplements (20 pages)

Category overview (3pp)

Global OTC CoQ10 supplements sales 2012-16
3 key trends in CoQ10 supplements
Global OTC CoQ10 supplements sales by region 2016
Global leading OTC CoQ10 supplements marketers 2016

CoQ10 supplements in North America (5pp)

North America OTC CoQ10 supplements sales by country 2016

USA OTC CoQ10 supplements sales 2012-16

USA leading OTC CoQ10 supplements 2016

Brand case study: Qunol

Qunol OTC sales 2012-16

Canada OTC CoQ10 supplements sales 2012-16

CoQ10 supplements in Asia-Pacific (4pp)

Asia-Pacific OTC CoQ10 supplements sales by country 2016

China OTC CoQ10 supplements sales 2012-16

Japan leading OTC CoQ10 supplements 2016

Australia leading OTC CoQ10 supplements 2016

CoQ10 supplements in Western Europe (4pp)

Western Europe OTC CoQ10 supplements sales by country 2016

Denmark OTC CoQ10 supplements sales 2012-16

Germany OTC CoQ10 supplements sales 2012-16

UK OTC CoQ10 supplements sales 2012-16

UK leading OTC CoQ10 supplements 2016

Spain OTC CoQ10 supplements sales 2012-16

CoQ10 supplements in C&E Europe (1pp)

C&E Europe OTC CoQ10 supplements sales by country 2016

Russia leading OTC CoQ10 supplements 2016

Outlook (3pp)

Global forecast OTC CoQ10 supplements sales 2021-26

North America forecast OTC CoQ10 supplements sales 2021-26

Western Europe forecast OTC CoQ10 supplements sales 2021-26

Asia-Pacific forecast OTC CoQ10 supplements sales 2021-26

C&E Europe forecast OTC CoQ10 supplements sales 2021-26

Garlic supplements (17 pages)

Category overview (4pp)

Global OTC garlic supplements sales 2012-16

3 key trends in garlic supplements

Allicin: the chemistry behind garlic

Global OTC garlic supplements sales by region 2016

Global leading OTC garlic supplements marketers 2016

Does garlic really support cardiovascular health?

Garlic supplements in Asia-Pacific (3pp)

Asia-Pacific OTC garlic supplements sales by country 2016

China OTC garlic supplements sales 2012-16

China leading OTC garlic supplements 2016

Australia OTC garlic supplements sales 2012-16

Australia leading OTC garlic supplements 2016

Japan OTC garlic supplements sales 2012-16

Japan leading OTC garlic supplements 2016

Garlic supplements in North America (3pp)

North America OTC garlic supplements sales by country 2016

USA OTC garlic supplements sales 2012-16

USA leading OTC garlic supplements 2016
Canada OTC garlic supplements sales 2012-16
Canada leading OTC garlic supplements 2016

Garlic supplements in Western Europe (4pp)
Western Europe OTC garlic supplements sales by country 2016
Germany OTC garlic supplements sales 2012-16
Germany leading OTC garlic supplements 2016
France OTC garlic supplements sales 2012-16
UK OTC garlic supplements sales 2012-16
Brand case study: Kwai
Kwai OTC garlic supplements sales 2012-16
Kwai leading OTC markets 2016

Other regions (1pp)
C&E Europe OTC garlic supplements sales 2012-16
Latin America OTC garlic supplements sales 2012-16

Outlook (2pp)
Global forecast OTC garlic supplements sales 2021-26
Asia-Pacific forecast OTC garlic supplements sales 2021-26
North America forecast OTC garlic supplements sales 2021-26
Western Europe forecast OTC garlic supplements sales 2021-26

Other supplements for heart health (20 pages)

Key insights
Multivitamins
Brand case study: Centrum
Single vitamins
Magnesium supplements (plus potassium)
Global OTC magnesium supplements sales 2012-2016
Global OTC magnesium supplements sales by region 2016
Global leading OTC magnesium supplements 2016
Probiotics
Brand case study: Pure Heart
Lecithin supplements
Global OTC lecithin supplements sales 2012-16
Global OTC lecithin supplements sales by country 2016
Flaxseed oil supplements
USA leading OTC flaxseed oil supplements 2016
Other herbal & natural supplements
Brand case study: i-Cool for Menopause plus Omega-3

Scientific studies (11 pages)

Overview
A daily aspirin could reduce US healthcare expenditure by \$692bn
Vitamin D
Vitamin K2
Multivitamins overselling their benefits?
Vitamin B
B vitamins and arginine could help to reduce blood pressure
Potassium
Magnesium

Cocoa flavanols: a sweeter way to stay healthy?
Garlic
Omega-3
Physicians should endeavour to discuss herbal options with CVD patients
Omega-7 / sea buckthorn
Tomato extract may thin blood
Probiotics
Gut microbiota could influence cardiovascular health
Oat beta-glucan
Konjac glucomannan
Lifestyle & heart disease
First "Mediterranean diet" supplement launched
Scientific studies key to revitalising existing supplements and highlighting new niches

Gender divide in heart health *(11 pages)*

Heart disease: the silent killer among women
Heart attacks: men vs women
Risk factors for women
Awareness initiatives
Symptoms: different genders, different signs
Ethnicity: the uncontrollable risk factor?
Women & heart disease
Are OTC heart health brands missing the vital female demographic?
Centrum gradually shifting heart health focus onto women
Bayer Aspirin helping raise heart health awareness in women