

Vitamins, Minerals & Supplements

**A Nicholas Hall report on the Global
OTC VMS market**

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Vitamins, minerals & supplements still generate the largest share (just over 30%) of the global OTC market and witnessed an upturn in performance in 2015 (+4.7% vs +3.1% the previous year). The picture across different regions is highly diverse with fast-growing emerging markets (like China, Russia and S Korea) and pockets of dynamism among developed nations (like Australia and Italy) contrasting with more muted or declining markets (like France, Japan, Poland and the UK). Low growth in North America's vast supplements market was primarily the result of safety and quality concerns in the US.

Probiotics remain a vital source of growth, offsetting a flatter performance by herbals & naturals, with fish oils and joint health supplements generally in decline. Tonics & cure alls enjoy impressive growth thanks to dynamism in China and S Korea. Among minerals, a strong showing from magnesium supplements offset a slow calcium segment affected by negative press. Single vitamins are enjoying a boom, outpacing multivitamins. Energy, heart health and immunity are all growing niches, while new delivery formats such as gummies and drink mixes are also helping to drive sales.

Discover all there is to know about the Global OTC VMS market with Nicholas Hall's latest report, which contains multi-country coverage and detailed reporting of individual categories and brands. Incorporating year-end 2015 OTC sales from Nicholas Hall's Global OTC Database DB6, the report features the latest trends & developments, in-depth brand case studies, and vital insight into factors affecting individual markets.

Country chapters drill down to the details, including brand sales and growth, impact of regulatory changes, new product launches, A+P campaigns and category forecasts.

Available as a whole report or as individual country or category chapters, with generous pre-publication discounts.

**Australia • Brazil • Canada • China • France
Germany • India • Indonesia • Italy
Japan • Poland • Russia • S Korea • UK • USA**



Global VMS Overview

Including consumer trends, a region by region breakdown and topline category trends

Leading VMS Markets

15 countries profiled, featuring key trends, individual category analysis, regulatory developments, success factors behind leading segments and brands, and forecasts for the future

- **Brazil** - As consumers switch on to the benefits of probiotics, herbal & natural joint health and hair & beauty supplements, dynamism will be helped by simplified registration for herbals
- **France** - Dereimbursement impacted several anti-arthritis brands and leading omega-3 supplements in early 2015, as Rx-to-OTC switches also contributed to a gradual shift to consumerised A+P, despite the continued prominence of semi-ethicals in some categories
- **India** - Multivitamins have been held back by the unavailability of a key brand, but chyawanprash is enjoying a resurgence and demand for probiotics is rising via increasing stress and lifestyle-related conditions
- **Japan** - In a declining market, tonic drinks were impacted by unfavourable summer weather and multivitamins saw a lack of development from leading brands, but a key growth trend is personalised supplement recommendations
- **Poland** - Supplements targeting sexual health, weight loss and hair & beauty have flooded the market, generics pose a continuing threat, and there is increasing demand for value and gift packs
- **USA** - Persistent low VMS growth takes the shine off an otherwise vibrant OTC market, with coverage of negative scientific studies an issue for some categories, but the few bright spots (probiotics, single vitamins, hair & beauty) bring a glimmer of hope

Gain further insights on all of the above plus 9 other markets in the dedicated country chapters

Brand Case Studies

Looking at some of the biggest and fastest-growing VMS brands, such as Airborne, Emergen-C and Swisse, and the factors behind their success

Global VMS Outlook

Predicting future prospects for the global VMS industry and opportunities & threats in individual markets, including sales forecasts to 2020 and 2025

Featured categories

Multivitamins • Single vitamins • Minerals • Eye health supplements • Hair & beauty supplements • Immune supplements • Herbal & natural supplements • Herbal & natural joint health • Herbal memory & brain health • Herbal antidepressants
Herbal menopause supplements • Probiotics • Tonics & cure alls
OTC tonic drinks • Chyawanprash

(NB not all categories are featured in all countries profiled)

Key questions addressed in this report:

Which markets enjoyed the best performances, and what is driving growth?

What opportunities remain untapped?

How will regulatory developments impact VMS?

What does the future hold for VMS markets around the world?

Which brands' A+P campaigns brought the most success?

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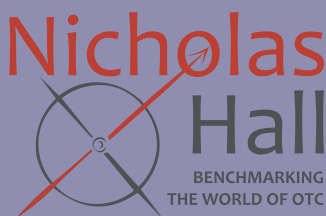
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Dedicated to benchmarking consumer healthcare markets and providing business solutions, we are specialists in OTC, with an international network of contacts, offering data & analysis, strategic advice and competitive intelligence on a global, regional or local basis.

Latest Nicholas Hall Reports:



Nicholas Hall's OTC YearBook 2016

Nicholas Hall's bestselling unique reference book contains comprehensive market data through December 2015 drawn from our **DB6** global OTC database.

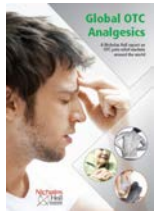
Published in April 2016



M&A

In a fragmented OTC market, expansion often means acquisition, but scouting for suitable acquisitions can take a long time. To help shorten that process, our M&A report includes a dedicated chapter identifying 100 companies of all sizes that present an enticing OTC opportunity.

Published in March 2016



Global OTC Analgesics

This report breaks down this integral category to give consumer healthcare executives detailed insight into the uncertainties that are facing brands in today's market, as well as the growth drivers and new opportunities.

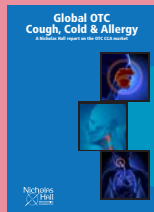
Published in November 2015



Nicholas Hall's Global OTC Markets

This report looks at the 12 largest OTC markets. While these markets lead the global industry, their performances differ wildly, showing the diverse nature of the consumer healthcare industry.

Published in September 2015



Global OTC Cough, Cold & Allergy

This comprehensive report offers a detailed analysis of the CCA market from both a global and country level, giving OTC marketers a detailed insight into the trends and developments that are impacting both brands and consumers.

Published in June 2015



Women's Health: Obstacles & Opportunities

This report analyses the market for a range of OTC options, considering products positioned for gender-specific concerns as well as more general ailments, covering areas including weight management, feminine intimate care, and migraine.

Published in March 2015



Global OTC Gastrointestinals

Discover all there is to know about GIs, from PPI switches in the US to dynamism in Latin America and dereimbursement in Europe. Available as a full publication or individual country chapters.

Published in February 2015

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