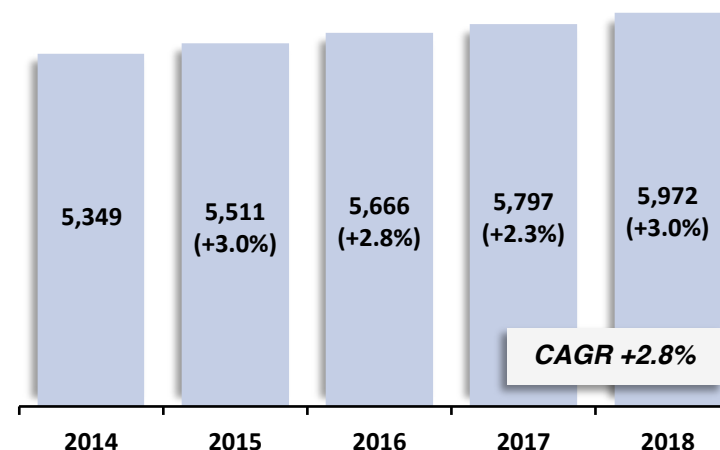


Multivitamins

Expanding range of products available

- Multivitamin topline grew across most regions; majority of leading brands are established international ranges, although strongest performance comes from dynamic newcomer Olly (*see case study in Longline vs Specialist Supplements*)
- Launch activity frequent, expanding range of positionings and formats; key advantage of multivitamins over other supplements is diversity of health benefits
- Niche products stand out from established ranges via innovative formulations and more appealing branding

Multivitamins sales 2014-18
(MSP, \$mn)



Topline multivitamins trends

- Multivitamins see frequent innovation, expanding positionings into wide range of health areas
- Convenient and palatable formats such as gummies, oral sprays and drinks popular
- While established international brands (e.g. Centrum) dominate, innovative new launches can succeed
- Social and lifestyle trends create demand for vitamins to supplement diets lacking in fruit and vegetables

Multivitamins sales by region 2018 (MSP, \$mn)

Region	\$mn	18/17	CAGR 18/14
North America	2,526.4	+4%	+2%
Asia-Pacific	1,576.2	+3%	+4%
Western Europe	790.4	+1%	+1%
Latin America	345.1	+7%	+6%
C&E Europe	295.1	-3%	+4%
Rest of World	438.9	+5%	+6%