

# Multivitamins

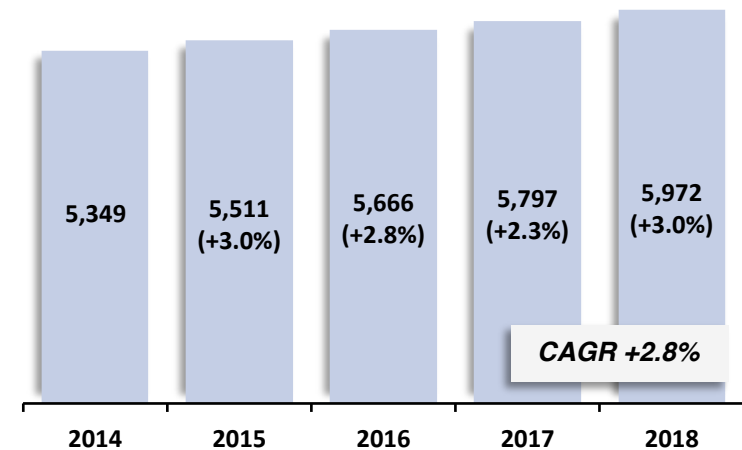
## Expanding range of products available

- 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

### 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 2014-18  
(MSP, \$mn)

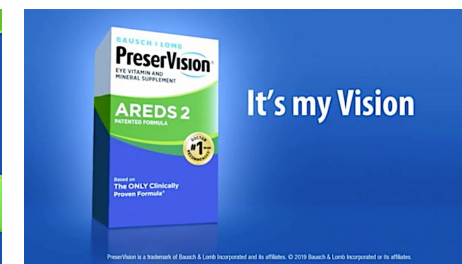


Multivitamins sales by region 2018 (MSP, \$mn)

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%

# Scientific backing for VMS brands – PreserVision

- The ads start by showing the woman in a doctor's office (where she tells us she has been diagnosed with AMD), emphasising its ethical heritage
- PreserVision AREDS 2 Formula + Multivitamin was launched in 2016
- The new 2-in-1 formula reduces the number of pills taken by consumers each day and was the first leading brand to combine the AREDS 2 nutrient formula with other essential vitamins & minerals (notably high levels of vitamin D to support the needs of older adults)
- Some other eye care players also field supplements with AREDS claims, although do not adhere strictly to the amounts suggested in the studies
- In some markets, dietary supplements based on the AREDS formulas are not even promoted as such, nor is there any reference to AMD on packaging or in A+P



Strategy is driven by narrow, targeted positioning, supported by strong scientific evidence. Marketing highlights that it is a patented, unique formula, creating a point of difference from competitors (and notably giving it strong defence against PLs in the USA). Reformulation in 2013 to match ingredients in AREDS 2 study enhanced the brand's credibility.

# Longline vs specialist supplements - Overview

## Longline supplement ranges compete across a wide array of segments

- In several markets, including (but not limited to) the USA, Canada, Australia, Germany and Japan, longline VMS ranges have a significant presence; these brands offer a wide range of products across vitamins, minerals and herbal & natural supplements (plus in some cases multivitamins and probiotics) all under a unified banner
- For example, global No.1 VMS brand **Nature Made** (Otsuka) fields products across most VMS segments (*see right*)
- The key advantage of longline supplement ranges is the ability to leverage branding and reputation, creating a complete range of health solutions able to respond to the rapidly-changing supplement market by launching new ingredients under a trusted brand name
- VMS ranges account for seven out of the Top 20 VMS brands in the USA (with a combined share of 15% of the entire \$12bn market according to **DB6**), while in Australia their presence is even stronger, with 10 of the Top 20 brands, including the entire Top 5, offering supplement ranges (almost 70% of tracked VMS sales)
- Although specialist supplements (best defined as products focusing on a single or small number of ingredients, often in a limited number of segments) may extend across adjacent segments, the focus of marketing remains narrower; specialist supplements are well-established in fish oils & omega-3 (where longline presentations account for only one brand in the Top 5)
- In garlic and CoQ10 supplements, while longline supplements are strongest in terms of number of brands available, certain specialist options are nevertheless growing well (*see case studies below*)

Vitamins & Supplements		Products by Health Interest		Tips & Topics	Our Commitment	
Specialty	Vitamins	MultiVitamins	Fish Oil & Omegas	Supplements	Minerals	Herbs
Adult Gummies	Vitamin A	Prenatal & Postnatal	Fish Oil	Acidophilus	Calcium	Cranberry
CholestOff	B-Complex	Multi+ Omega-3	Flaxseed Oil	Alpha Lipoic Acid	Iron	Echinacea
Daily Packs	B Vitamins	Multivitamins	Krill Oil	Astaxanthin	Magnesium	Garlic
Diabetes Health Pack	Vitamin C	Multivitamins for Men	Omega-3	Biotin	Potassium	Ginkgo Biloba
Kids First Gummies	Vitamin D	Multivitamins for Women	Triple Omega	Cod Liver Oil	Zinc	Milk Thistle
Hair, Skin & Nails	Vitamin E			CoQ10		St John's Wort
Probiotics	Vitamin K			Folic Acid		Super Saw Palmetto
SAM-e				Glucosamine/Chondroitin		Turmeric Curcumin
Sleep Aids				Lutein		
TripleFlex				Lysine		
VitaMelts				Melatonin		

*Nature Made range crosses virtually all VMS categories & segments*

# New & emerging ingredients – Curcumin

## Spotlight on innovative curcumin launches 2017-19

- Lilac's **Nolopecia** hair loss supplement, launched in USA in December 2017, claims to be first-of-a-kind product that “targets latent viruses” to support DHT and androgen receptor levels, stimulating hair growth; combines quercetin, curcumin, selenium, cinnamon and liquorice
- **CurcuminPro** range (CurcuminPro / Nutritional Delivery Systems), launched February 2018, differentiated from other turmeric supplements by claims it is “world’s first curcumin line of products”, encompassing diverse selection of health foods and supplements
- Line includes **Cursplash** curcumin-enriched soft drinks, with presentations for anti-ageing, heart health, muscular health and anti-inflammatory benefits available
- CurcuminPro also claims to be first “biosoluble” curcumin supplement, using a protein isolate to improve bioavailability



- Innovative fish oil brand **Aqua Biome Fish Oil** (Enzymedica) includes a fish oil + Meriva curcumin combination, rolled out in March 2019
- April 2019 launch **Cartijoint Forte** (Fidia Pharma) uses Arjuna's Curcugreen in combination with glucosamine and chondroitin
- **Charlotte's Web Recovery** (Charlotte's Web) gummies, launched June 2019 in the USA, combine curcumin, ginger and cannabis to support joint health