

Future Opportunities & Growth Drivers in VMS

A Strategic Review of Vitamins, Minerals & Supplements

(266 pages)

Definitions & methodology

Executive Summary (16 pages)

Global overview (9pp)

VMS offers exciting growth opportunities

VMS sales 2014-18

VMS sales by region 2018

Leading VMS markets 2018

VMS sales by category 2018

Leading VMS brands 2018

Competitive landscape (4pp)

Strong performances for many leading VMS players, but several find growth elusive

Leading VMS marketers 2018

Outlook (2pp)

Impressive growth forecast for numerous VMS categories

VMS forecast sales 2023-28

VMS forecast sales by region 2023-28

VMS forecast sales by category 2023-28

VMS Category Analysis (116 pages)

Single vitamins (10 pages)

Wide range of positionings boost growth

Single vitamins sales 2014-18

Single vitamins sales by region 2018

Single vitamins sales by segment 2018

Leading single vitamins markets 2018

Leading single vitamins markets by segment 2018

Leading single vitamins brands 2018

Leading single vitamins marketers 2018

Positive studies and high levels of vitamin deficiency to boost growth

Single vitamins forecast sales 2023-28

Single vitamins forecast sales by segment 2023-28

Herbal & natural supplements (10 pages)

Longline ranges battle with specialist brands

Herbal & natural supplements sales 2014-18

Herbal & natural supplements sales by region 2018

Herbal & natural supplements sales by segment 2018

Leading Herbal & natural supplements markets 2018

Leading Herbal & natural supplements markets by segment 2018
Leading Herbal & natural supplements brands 2018
Leading Herbal & natural supplements marketers 2018
Scope of supplements being extended with diverse positionings
Herbal & natural supplements forecast sales 2023-28
Herbal & natural supplements forecast sales by segment 2023-28

Multivitamins (7 pages)

Expanding range of products available
Multivitamins sales 2014-18
Multivitamins sales by region 2018
Leading multivitamins markets 2018
Leading multivitamins brands 2018
Leading multivitamins marketers 2018
Bright future for category driven by innovation
Multivitamins forecast sales 2023-28

Mineral supplements (10 pages)

Dynamism primarily in Asia and LatAm
Minerals sales 2014-18
Minerals sales by region 2018
Minerals sales by segment 2018
Leading minerals markets 2018
Leading minerals markets by segment 2018
Leading minerals brands 2018
Leading minerals marketers 2018
Tackling prevalent conditions while adding functionality key
Minerals forecast sales 2023-28
Minerals forecast sales by segment 2023-28

Probiotics (9 pages)

Diverse positionings and growing consumer awareness
Probiotics sales 2014-18
Probiotics sales by region 2018
Leading probiotics markets 2018
Leading probiotics brands 2018
Leading probiotics marketers 2018
Expansion into niche positionings will drive growth
Probiotics forecast sales 2023-28

Herbal & natural joint health (9 pages)

Ageing population helps drive growth in certain markets
Herbal & natural joint health sales 2014-18
Herbal & natural joint health sales by region 2018
Leading herbal & natural joint health markets 2018
Leading herbal & natural joint health brands 2018
Leading herbal & natural joint health marketers 2018
High level of NPD activity
Herbal & natural joint health forecast sales 2023-28

Hair & beauty supplements (8 pages)

Scientifically-backed products popular

Hair & beauty supplements sales 2014-18

Hair & beauty supplements sales by region 2018

Leading hair & beauty supplements markets 2018

Leading hair & beauty supplements brands 2018

Leading hair & beauty supplements marketers 2018

High demand for innovative and effective products

Hair & beauty supplements forecast sales 2023-28

OTC tonic drinks (5 pages)

Mid-tier bright spots unable to reverse decline

OTC tonic drinks sales 2014-18

OTC tonic drinks sales by country 2018

Leading OTC tonic drinks brands 2018

Leading OTC tonic drinks marketers 2018

Innovation key to reversing decline

OTC tonic drinks forecast sales 2023-28

Pregnancy vitamins (8 pages)

Marketers looking to NPD to stimulate growth

Pregnancy vitamins sales 2014-18

Pregnancy vitamins sales by region 2018

Leading pregnancy vitamins markets 2018

Leading pregnancy vitamins brands 2018

Leading pregnancy vitamins marketers 2018

Pregnancy vitamins set for solid growth

Pregnancy vitamins forecast sales 2023-28

Eye health supplements (7 pages)

Market posting solid growth, although reliant on USA

Eye health supplements sales 2014-18

Eye health supplements sales by region 2018

Leading eye health supplements markets 2018

Leading eye health supplements brands 2018

Leading eye health supplements marketers 2018

Increasing demand for eye health solutions will boost sales

Eye health supplements forecast sales 2023-28

Immune supplements (6 pages)

Growth driven by innovation

Immune supplements sales 2014-18

Immune supplements sales by region 2018

Leading immune supplements markets 2018

Leading immune supplements brands 2018

Leading immune supplements marketers 2018

Relatively small category has high growth potential

Immune supplements forecast sales 2023-28

Herbal memory & brain health (7 pages)

Category diversification less common outside USA
Herbal memory & brain health sales 2014-18
Herbal memory & brain health sales by region 2018
Leading herbal memory & brain health markets 2018
Leading herbal memory & brain health brands 2018
Leading herbal memory & brain health marketers 2018
Untapped niches exist in many markets
Herbal memory & brain health forecast sales 2023-28

Herbal menopause supplements (9 pages)

Ageing population key market driver
Herbal menopause supplements sales 2014-18
Herbal menopause supplements sales by region 2018
Leading herbal menopause supplements markets 2018
Leading herbal menopause supplements brands 2018
Leading herbal menopause supplements marketers 2018
Proprietary ingredients and formulation key success factors
Herbal menopause supplements forecast sales 2023-28

Herbal antidepressants (6 pages)

Small and under-developed category in decline
Herbal antidepressants sales 2014-18
Herbal antidepressants sales by region 2018
Leading herbal antidepressants markets 2018
Leading herbal antidepressants brands 2018
Leading herbal antidepressants marketers 2018
Consumer education important to drive sales
Herbal antidepressants forecast sales 2023-28

Private labels & generics vs brands (8 pages)

Brands face strong competition from PLs and generics (but holding their own)
USA VMS private label vs rest of category sales 2014-18
USA private label split in leading VMS categories 2018
UK private label vs rest of category sales 2014-18
UK private label vs rest of category volume sales 2014-18
UK private label split in leading VMS categories 2018
Germany private label vs rest of category sales 2014-18
Germany private label vs rest of category volume sales 2014-18
Germany private label split in leading VMS categories 2018

Scientific Backing for VMS Brands (24 pages)

Overview (1p)

Berocca (2pp)

Berocca sales 2014-18

Caltrate (2pp)

Caltrate sales 2014-18

Cenovis (2pp)

Cenovis sales 2014-18

Cenovis probiotics sales 2014-18

Centrum (2pp)

Centrum sales 2014-18

Enterogermina (2pp)

Enterogermina sales 2014-18

Magne B6 (2pp)

Magne B6 sales 2014-18

Orthomol (2pp)

Orthomol sales 2014-18

Pharmaton (2pp)

Pharmaton sales 2014-18

PreserVision (3pp)

PreserVision sales 2014-18

Vitabiotics (3pp)

Vitabiotics sales 2014-18

Key studies supporting Vitabiotics brands

e-Commerce (12 pages)

e-Commerce providing strong competition to brick-and-mortar channel

Leading markets internet & mail order OTC sales 2018 vs Retail sales (VMS only)

China leading VMS internet & mail order brands 2018

USA leading internet & mail order brands 2018

Internet & mail order forecast sales 2023-28

Direct-to-consumer selling an increasingly prominent channel

Ritual

Hims

Goop

Elysium Health

CBD Supplements (15 pages)

Strong growth but held back by vague regulation

CBD sales 2017-18

CBD sales by region

Leading CBD markets 2018

US CBD launch activity by positioning (2015-19)

Strong growth, but regulatory confusion a barrier

CBD forecast sales 2023-28

Longline vs Specialist Supplements (20 pages)

Overview (6pp)

Longline supplement ranges compete across a wide array of segments

Leading CoQ10 supplements 2018

Leading garlic supplements 2018

Leading fish oil & omega-3 supplements 2018

Leading multivitamins 2018

Leading calcium supplements 2018

Leading hair & beauty supplements 2018

Longline vs specialist supplements split in leading VMS segments 2018

Longline vs specialist supplements split in leading VMS markets 2018

Leading VMS brands 2018

Nature Made (3pp)

World leader in VMS shows benefits of longline ranges

Nature Made sales 2014-18

Nature Made sales by category 2018

Nature Made partners with Tespo for innovative vitamin delivery system

Webber Naturals (1p)

Unification of brands under marketer name builds trust

Webber Naturals sales 2014-18

Webber Naturals sales by category 2018

Oilly (2pp)

New entrant in US longline VMS Oilly growing well

Oilly sales 2014-18

Oilly sales by category 2018

Garlique (1p)

"Odour free, taste free, drug free" garlic supplement outperforms longline ranges

Garlique sales 2014-18

Prevagen (1p)

High profile protected sales in face of regulatory challenges

Prevagen sales 2014-18

Qunol (1p)

Qunol invigorated global CoQ10 topline and has now entered turmeric segment

Nordic Naturals (2pp)

Diversification capitalises on brand's reputation as a fish oil specialist

Nordic Naturals fish oils & omega-3 sales 2014-18

Key learnings (2pp)

Advantages of longline supplements

Advantages of specialist supplements

Disadvantages of longline supplements

Disadvantages of specialist supplements

Personalisation (11 pages)

What is personalisation? (2pp)

Centrum US sales by presentation 2018

Thorne Research (2pp)

Thorne Research – premium VMS line moving into personalised nutrition

Vitl (1p)

Vitl expands into home “DNA nutrition testing”

Persona (1p)

Nestlé Health Science acquires Persona personalised vitamin business

Fancl (1p)

Fancl builds on segmented portfolio with in-store consultation

The Vitamin Shoppe (1p)

The Vitamin Shoppe’s Only Me subscription service builds on retailer’s expertise

Approaches to personalisation (2pp)

Patient surveys

In-store consultation

Home diagnostics

Looking to the future – is true personalisation possible?

New & Emerging Ingredients (21 pages)

Spotlight on trends (1p)

Ingredient innovation focused on purity, availability and format

Curcumin (2pp)

Curcumin a rapidly-growing segment in joint health

Spotlight on innovative curcumin launches 2017-19

Dolcas-Tenshi (1p)

Dolcas-Tenshi innovating in male sexual health and curcumin segments

Evonik (1p)

Evonik present in new ingredients and specialist format innovations

Pyroloquinoline quinone (1p)

PQQ an emerging supplement for mitochondrial health

Spotlight on nootropics (2pp)

Nootropics growing among memory & brain health supplements, particularly in USA

Spotlight on cognition (3pp)

Mibelle’s SaraPepp Nu a “unique and natural cognition and mental performance enhancer”

ThinkNOO offers “a smarter coffee experience”

Botalys’ HRG80 an “Ultra-pure ginseng powder”

HP Ingredients’ Quantum IQ increases visibility of kesum supplements

Proprietary spearmint extract may have cognitive health and reaction benefits

Lycored’s Lycomato + omega-3 combination for brain health

Nicotinamide (2pp)

Nicotinamide derivatives expand vitamin B segment

Algae supplements (3pp)

Algae strains increasingly an alternative source of nutrients
Astaxanthin specialist Algatech developing supplement based on haematococcus pluvialis
Triton Algae Innovations receives GRAS status for algae powder
Microphyt developing wide range of algae-based products

Probiotics for bone health (1p)

Probiotics for bone health an emerging segment, building on existing positionings

Other innovation (3pp)

Merck's Arcofolin a new ingredient in B-vitamins
BLIS M18 a Generally Recognised as Safe probiotic for oral care
Natural combination TOTUM-63 undergoing clinical trials for management of metabolic disease
Valensa's innovations in saw palmetto offer new formats for urinary health
GNC's Tamaflex range combines turmeric with tamarind extract
Crominex 3+ may be an effective ingredient for heart health
Vitamin K2 an emerging entrant in vitamin supplements

Ingredient manufacturers (10 pages)

Chr. Hansen (1p)

Probiotic specialist active in partnerships to explore new health areas

DSM (1p)

Vitamin and supplement specialist active in partnerships

DuPont (1p)

Danisco and HOWARU product lines give diverse manufacturer presence in nutrition

FutureCeuticals (1p)

FutureCeuticals' USP is American-sourced plant extracts

Indena (1p)

Indena's Phytosome technology a point of difference

Lallemand (1p)

Food specialist built probiotics presence via M&A

OptiBiotix (1p)

Portfolio strong in weight management and cholesterol control options

Probi (1p)

Probi is a key player in probiotic innovation

Sabinsa (1p)

Diverse VMS ingredient manufacturer strong in weight management and heart health

VMS Outlook (10 pages)

Impressive growth forecast for numerous VMS categories
VMS forecast sales 2023-28
VMS forecast sales by region 2023-28

VMS forecast sales by category 2023-28
Category prospects
Opportunities & threats