



Passport

Vitamins in Argentina

Euromonitor International

October 2021

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Some content and data have been
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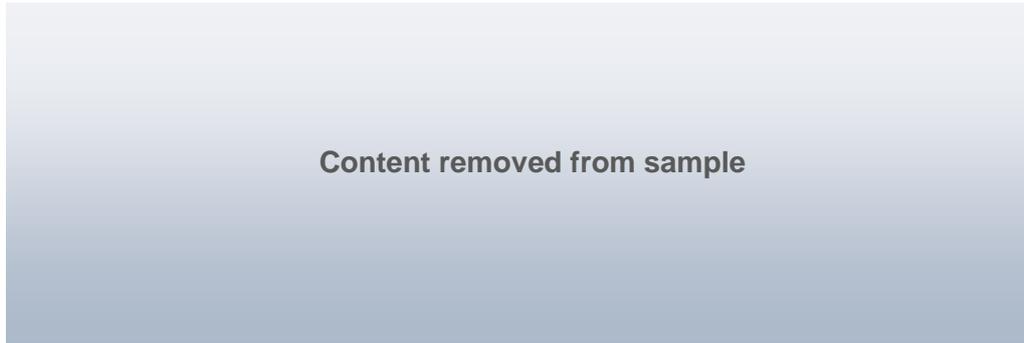
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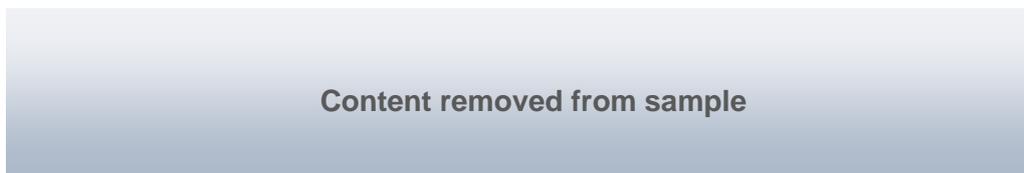
VITAMINS IN ARGENTINA - CATEGORY ANALYSIS

KEY DATA FINDINGS

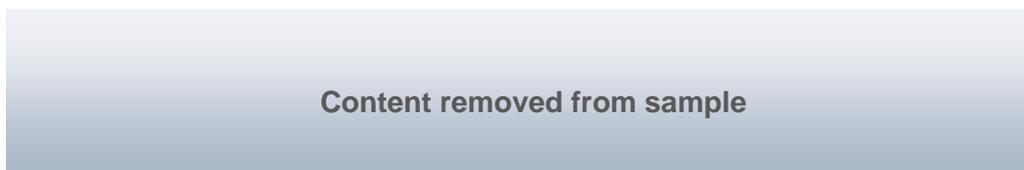


2021 DEVELOPMENTS

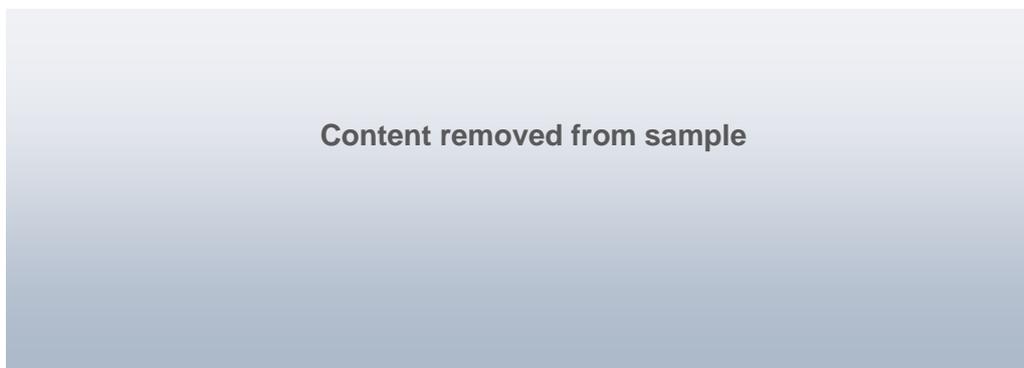
Vitamins sees tremendous growth in 2021 due to continuing COVID-19 pandemic

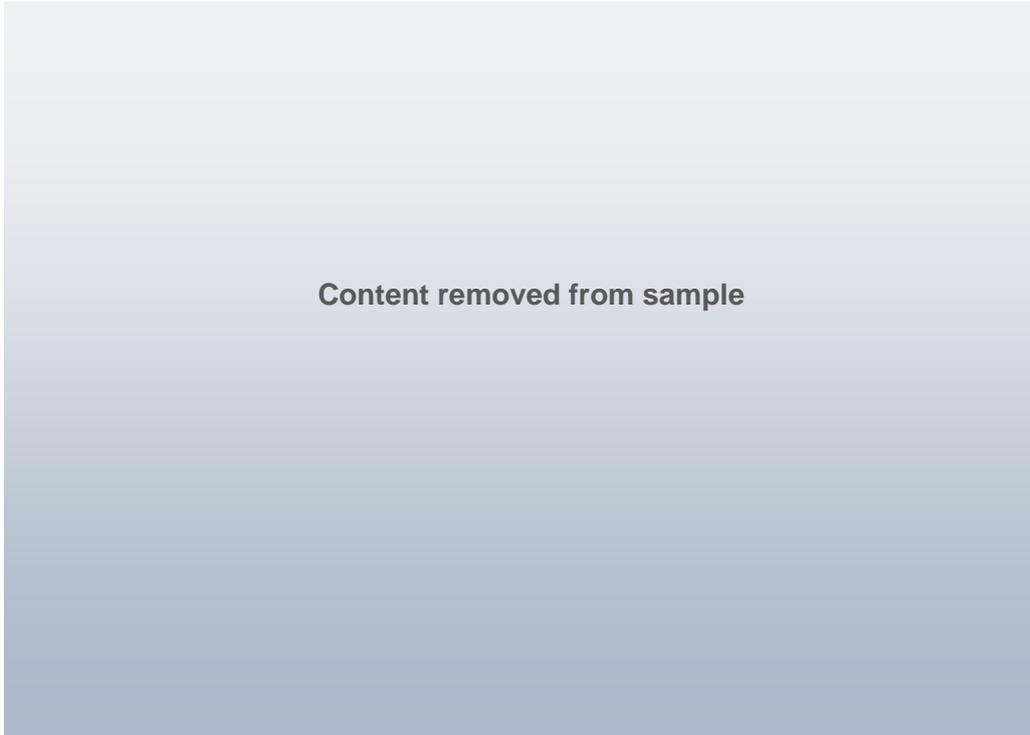


Vitamin C experiences second consecutive year of record growth in 2021



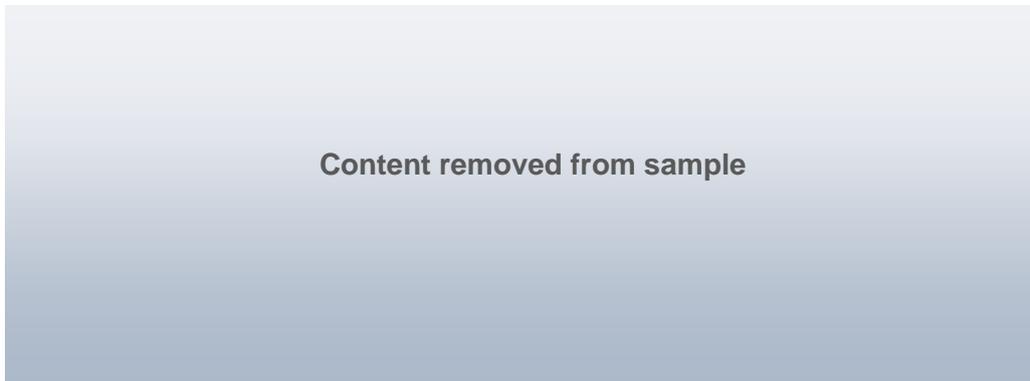
Bayer Argentina leads, while Arcor shows impressive growth in 2021



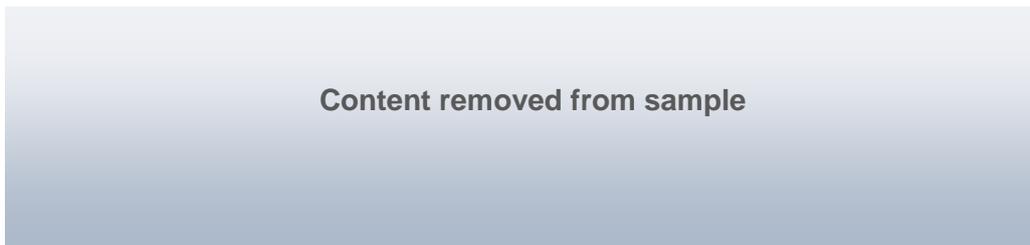


PROSPECTS AND OPPORTUNITIES

Burgeoning health and wellness trend set to boost sales in the forecast period



E-commerce sales expected to continue gaining ground during the forecast period



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Private label vitamin brands expected to grow during the forecast period

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CATEGORY DATA

Table 1 Sales of Vitamins by Category: Value 2016-2021

ARS million	2016	2017	2018	2019	2020	2021
- Multivitamins	Data removed from sample					
- Single Vitamins						
-- Vitamin A						
-- Vitamin B						
-- Vitamin C						
-- Vitamin D						
-- Vitamin E						
-- Other Single Vitamins						
Vitamins						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

Table 2 Sales of Vitamins by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
- Multivitamins	Data removed from sample		
- Single Vitamins			
-- Vitamin A			
-- Vitamin B			
-- Vitamin C			
-- Vitamin D			
-- Vitamin E			
-- Other Single Vitamins			
Vitamins			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

Table 3 Sales of Multivitamins by Positioning: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Elderly	Data removed from sample					
Men						
Pregnancy						
Teenagers						
Women						
Other Multivitamins						
Positioning						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

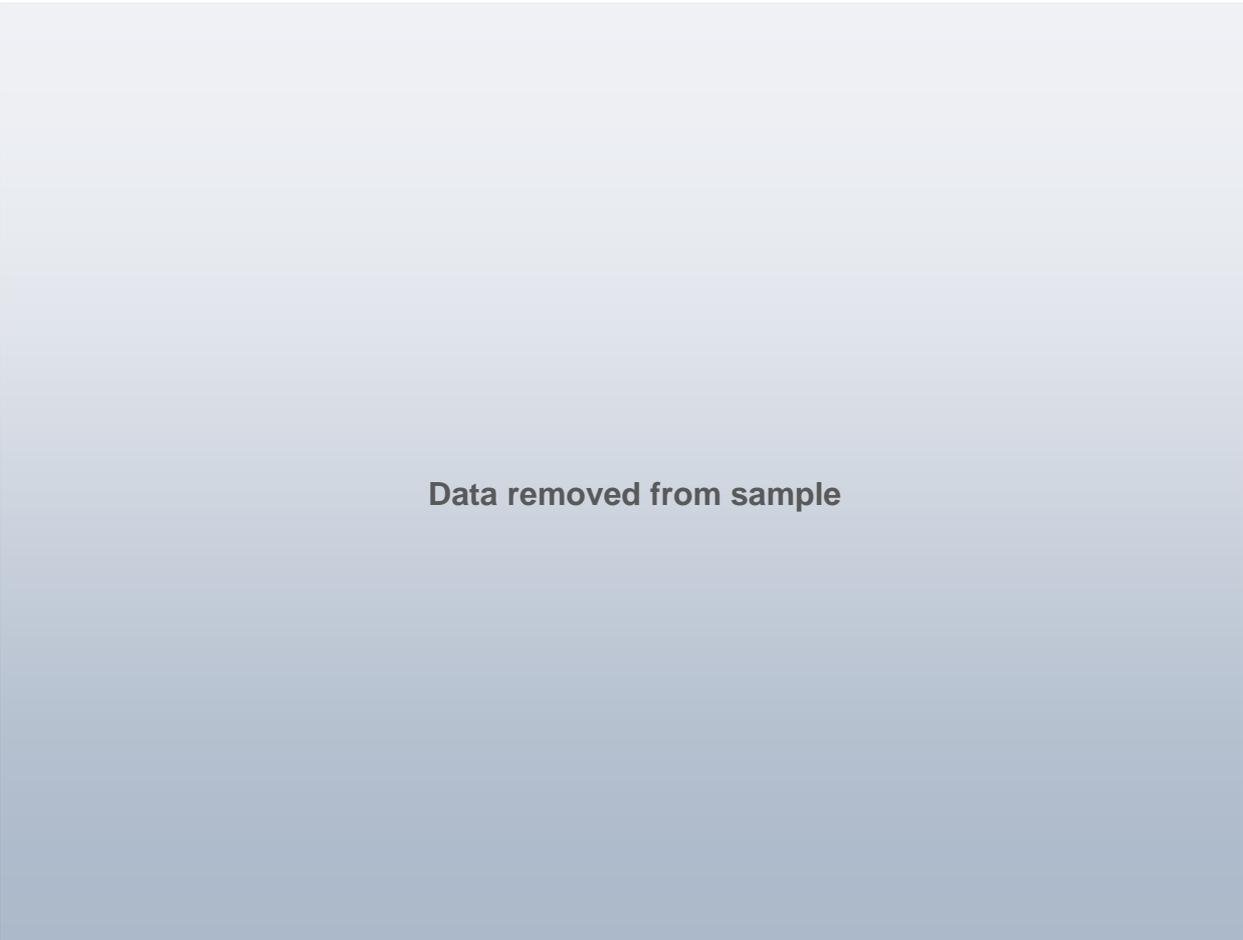
Table 4 NBO Company Shares of Vitamins: % Value 2017-2021

% retail value rsp	2017	2018	2019	2020	2021
Company	Data removed from sample				

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 LBN Brand Shares of Vitamins: % Value 2018-2021

% retail value rsp	Company (NBO)	2018	2019	2020	2021
Brand (GBO)	Data removed from sample				



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Forecast Sales of Vitamins by Category: Value 2021-2026

ARS million

	2021	2022	2023	2024	2025	2026
- Multivitamins	Data removed from sample					
- Single Vitamins						
-- Vitamin A						
-- Vitamin B						
-- Vitamin C						
-- Vitamin D						
-- Vitamin E						
-- Other Single Vitamins						
Vitamins						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

Table 7 Forecast Sales of Vitamins by Category: % Value Growth 2021-2026

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
- Multivitamins	Data removed from sample		
- Single Vitamins			
-- Vitamin A			
-- Vitamin B			
-- Vitamin C			
-- Vitamin D			
-- Vitamin E			
-- Other Single Vitamins			
Vitamins			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

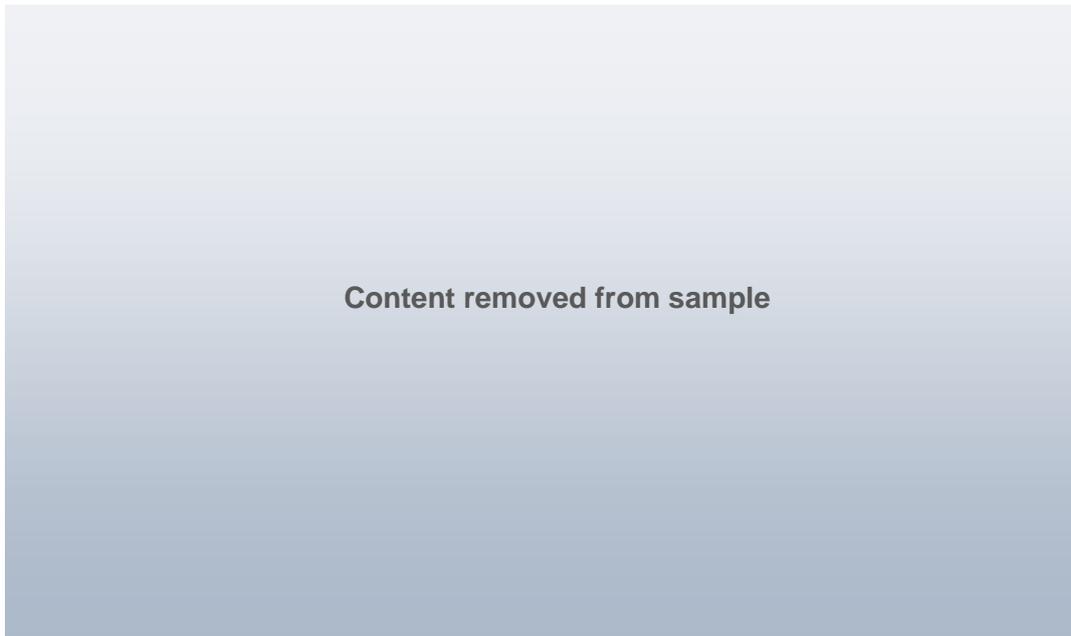
CONSUMER HEALTH IN ARGENTINA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

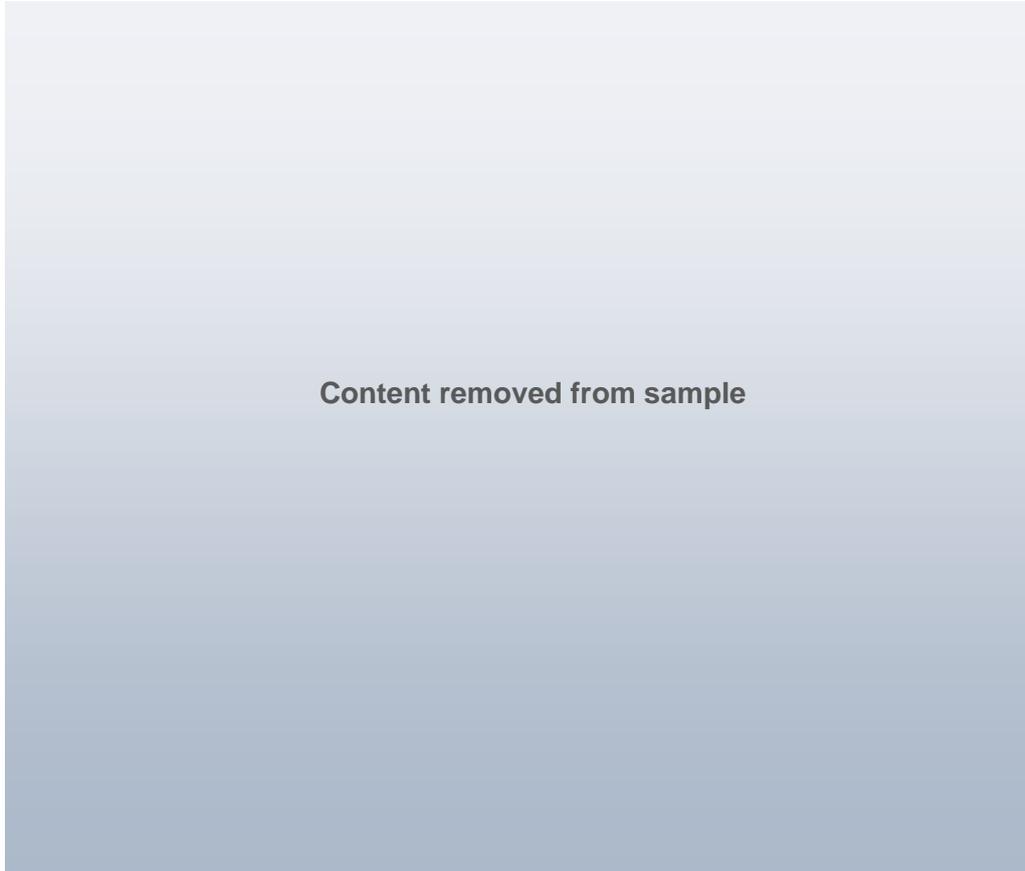
Consumer health in 2021: The big picture



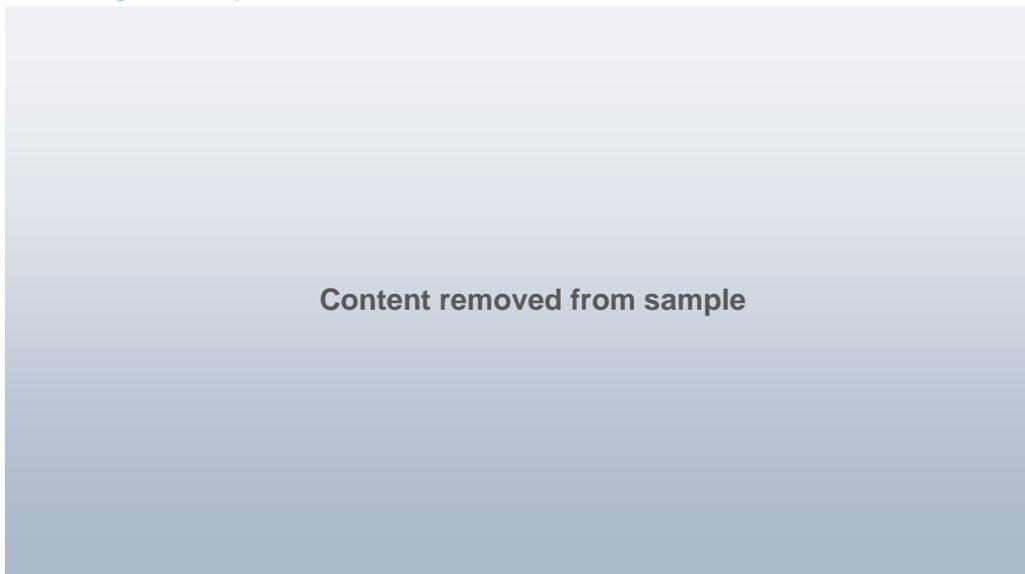
2021 key trends



Competitive landscape



Retailing developments



What next for consumer health?

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MARKET INDICATORS

Table 8 Consumer Expenditure on Health Goods and Medical Services: Value 2016-2021

ARS million	2016	2017	2018	2019	2020	2021
Pharmaceuticals, medical appliances/ equipment	Data removed from sample					
Outpatient services						
Hospital services						
Total						

Source: Euromonitor International from official statistics, trade associations, trade interviews

Table 9 Life Expectancy at Birth 2016-2021

years	2016	2017	2018	2019	2020	2021
Males	Data removed from sample					
Females						

Source: Euromonitor International from official statistics

MARKET DATA

Table 10 Sales of Consumer Health by Category: Value 2016-2021

ARS million	2016	2017	2018	2019	2020	2021
OTC	Data removed from sample					
Sports Nutrition						
Vitamins and Dietary Supplements						
Weight Management and Wellbeing						
Herbal/Traditional Products						
Allergy Care						

Paediatric Consumer Health
Consumer Health

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 Sales of Consumer Health by Category: % Value Growth 2016-2021

% current value growth

2020/21 2016-21 CAGR 2016/21 Total

OTC
Sports Nutrition
Vitamins and Dietary Supplements
Weight Management and Wellbeing
Herbal/Traditional Products
Allergy Care
Paediatric Consumer Health
Consumer Health

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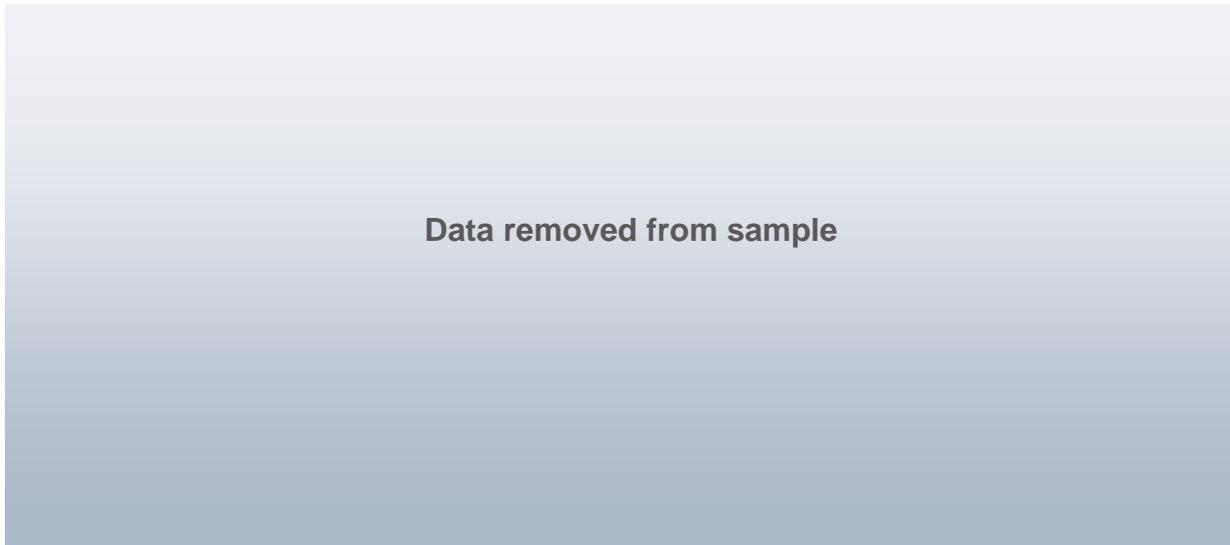
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 NBO Company Shares of Consumer Health: % Value 2017-2021

% retail value rsp
Company

2017 2018 2019 2020 2021

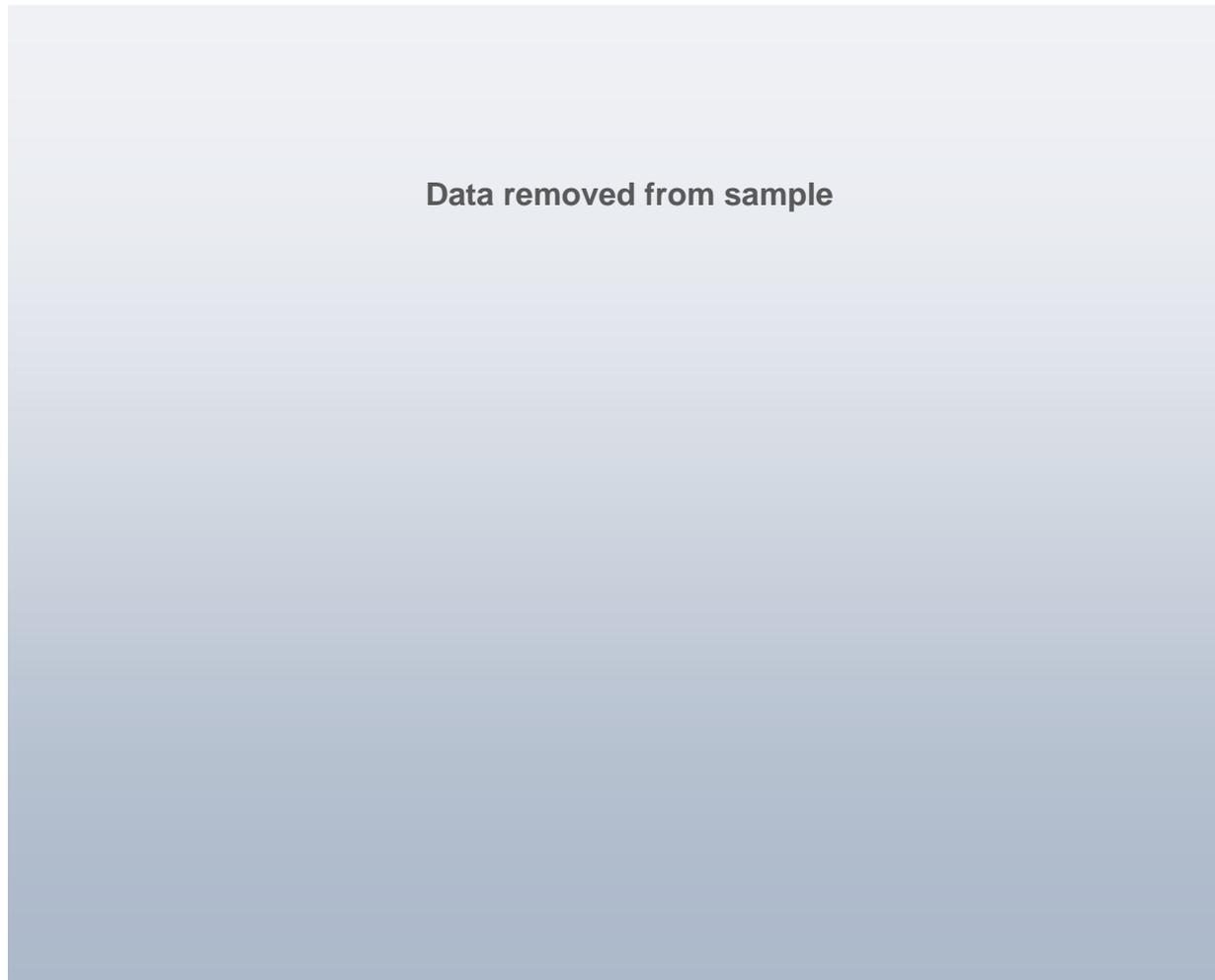
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 LBN Brand Shares of Consumer Health: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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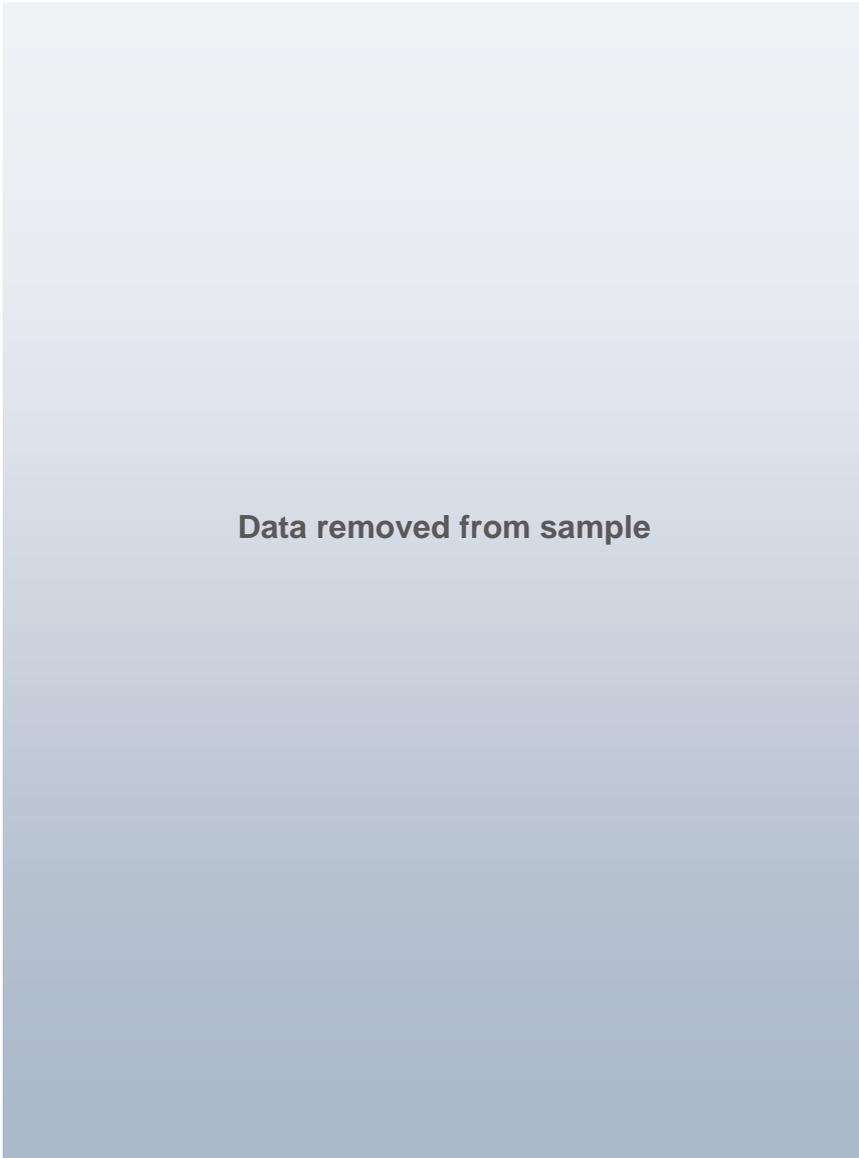


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Distribution of Consumer Health by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
--------------------	------	------	------	------	------	------

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Other Grocery Retailers
- Healthfood shops
- Other Other Grocery Retailers
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Beauty Specialist Retailers
- Chemists/Pharmacies
- Optical Goods Stores
- Drugstores/parapharmacies
- Vitamins and Dietary Supplements Specialist Retailers
- Other Consumer Health Non-Grocery Specialists
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



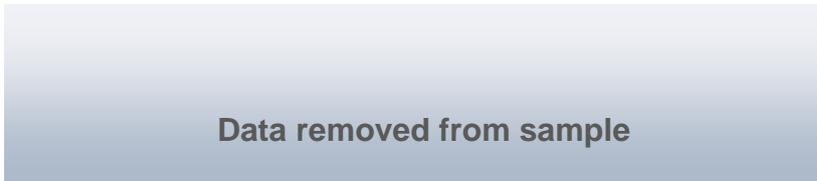
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Distribution of Consumer Health by Format and Category: % Value 2021

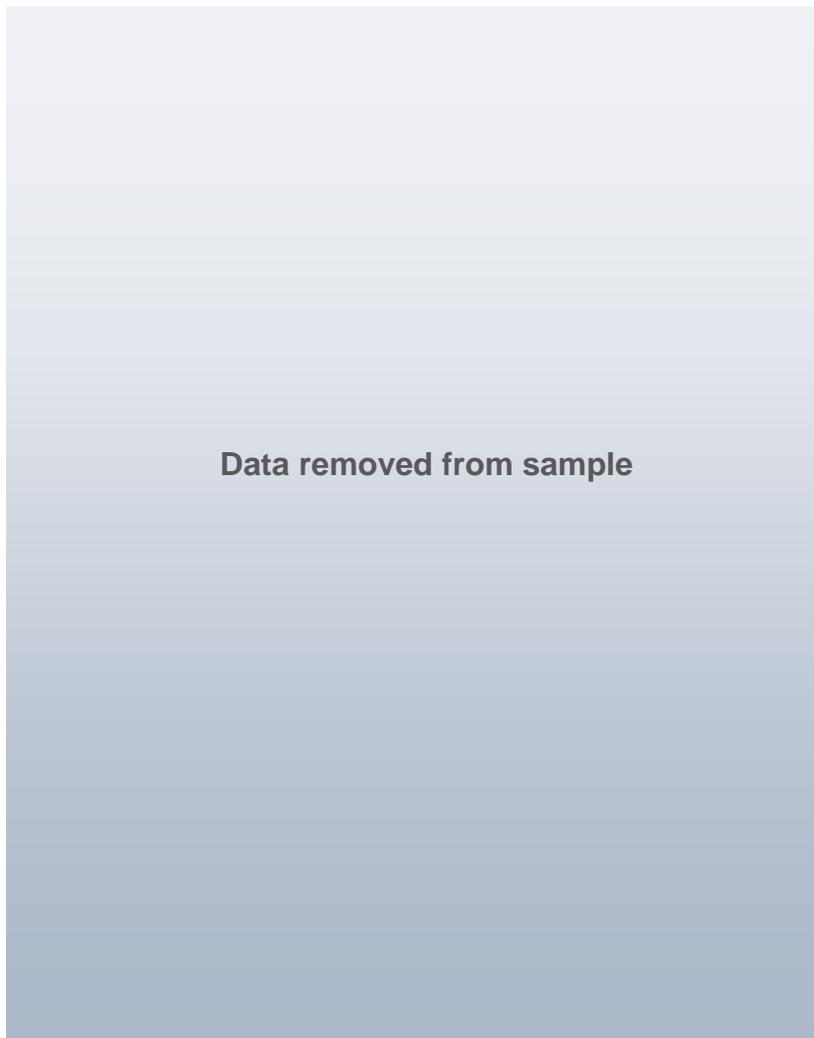
% retail value rsp

OTC	Sports Nutrition	Vitamins and Dietary Supplements	Weight Management and Wellbeing	Herbal/Traditional Products	Allergy Care
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- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers

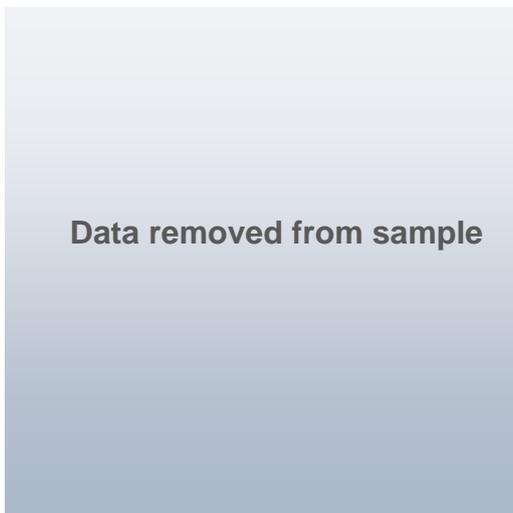


- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Other Grocery Retailers
- Healthfood shops
- Other Other Grocery Retailers
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Beauty Specialist Retailers
- Chemists/Pharmacies
- Optical Goods Stores
- Drugstores/parapharmacies
- Vitamins and Dietary Supplements Specialist Retailers
- Other Consumer Health Non-Grocery Specialists
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total

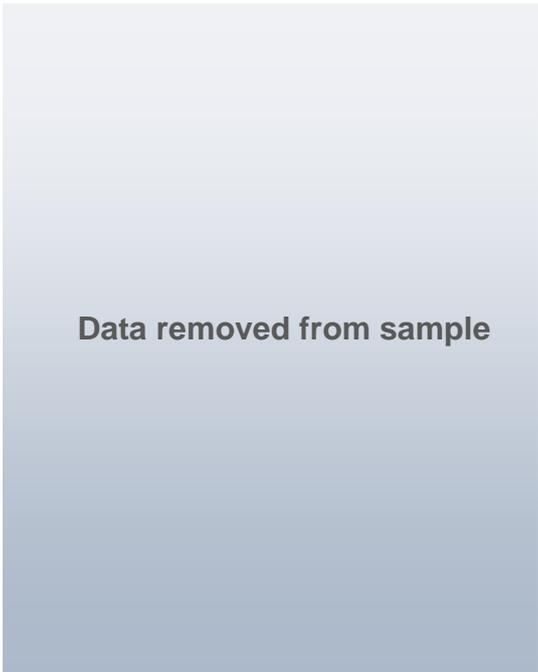


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Consumer
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- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Other Grocery Retailers
- Healthfood shops
- Other Other Grocery Retailers
- Mixed Retailers



- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Beauty Specialist Retailers
- Chemists/Pharmacies
- Optical Goods Stores
- Drugstores/parapharmacies
- Vitamins and Dietary Supplements Specialist Retailers
- Other Consumer Health Non-Grocery Specialists
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Key: OTC = over the counter; SN = sports nutrition; VDS = vitamins and dietary supplements; WMW = weight management and wellbeing; HTP = herbal/traditional products; AC = Allergy Care; PCH = paediatric consumer health

Table 16 Forecast Sales of Consumer Health by Category: Value 2021-2026

ARS million

	2021	2022	2023	2024	2025	2026
OTC	Data removed from sample					
Sports Nutrition						
Vitamins and Dietary Supplements						
Weight Management and Wellbeing						
Herbal/Traditional Products						
Allergy Care						
Paediatric Consumer Health						
Consumer Health						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Consumer Health by Category: % Value Growth 2021-2026

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
OTC	Data removed from sample		

Sports Nutrition
Vitamins and Dietary Supplements
Weight Management and Wellbeing
Herbal/Traditional Products
Allergy Care
Paediatric Consumer Health
Consumer Health

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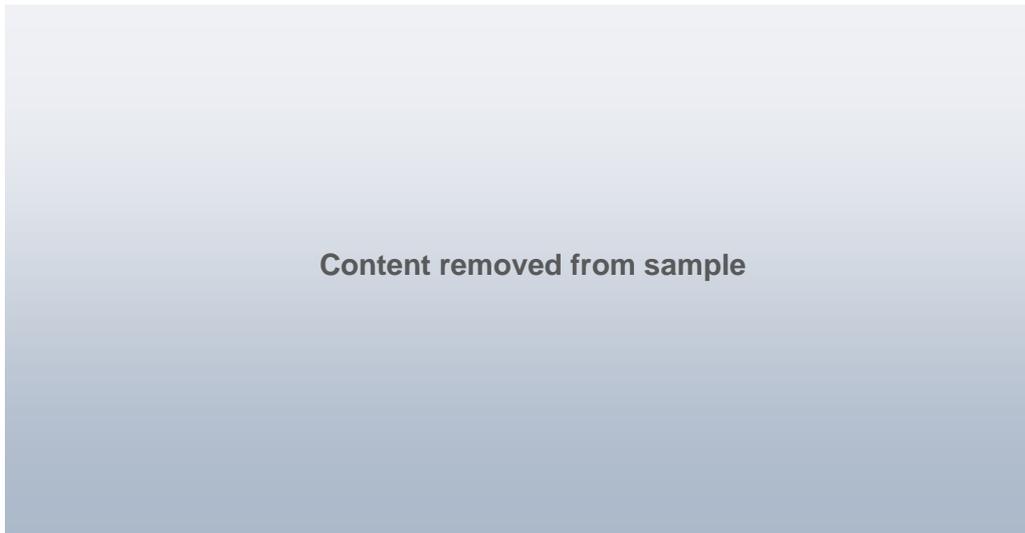
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

APPENDIX

OTC registration and classification

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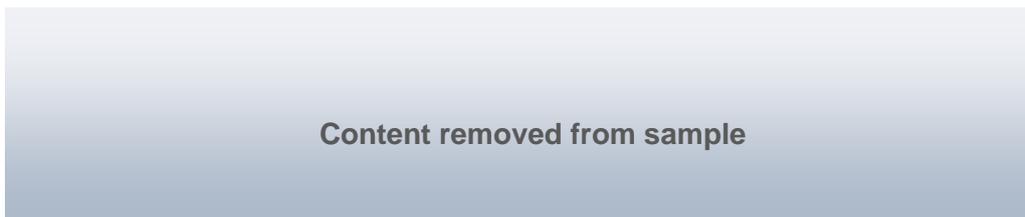
Vitamins and dietary supplements registration and classification



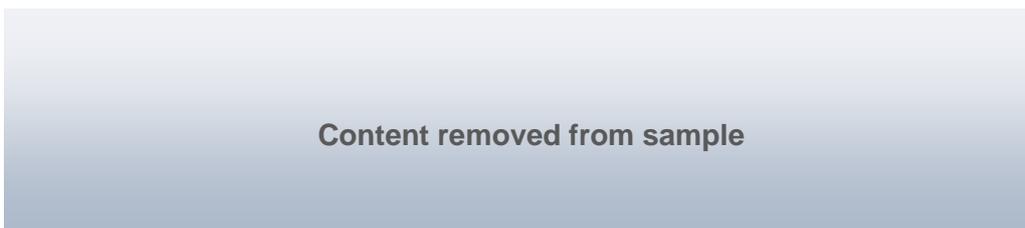
Self-medication/self-care and preventive medicine

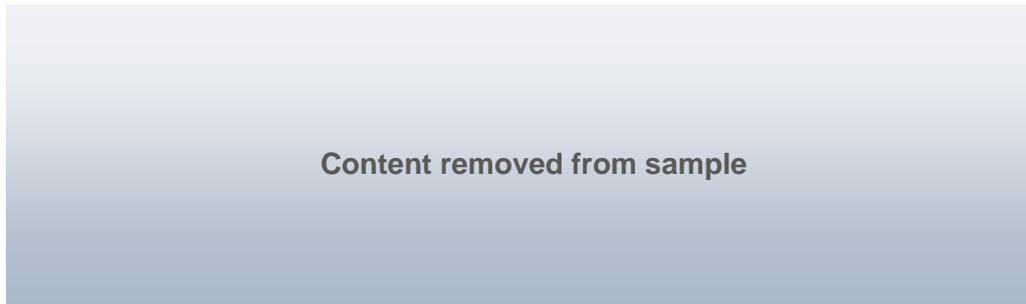


Switches



DISCLAIMER

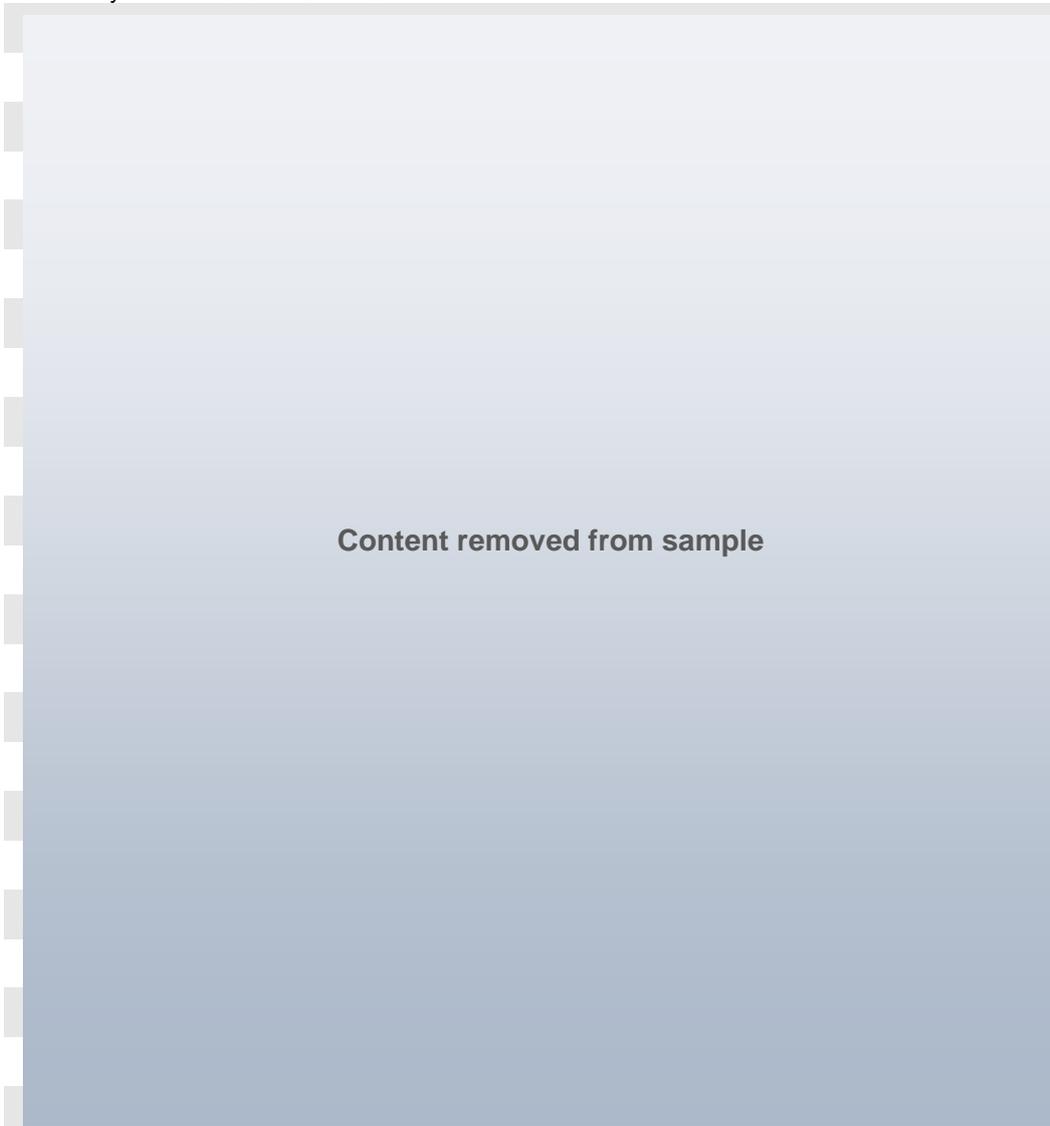




SOURCES

Sources used during the research included the following:

Summary 1 Research Sources



Source: Euromonitor International