



Passport

WORLD MARKET FOR CONSUMER HEALTH

October 2020

This sample report is for illustration
purposes only.

Some content and data have been
changed.

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Introduction

Global Outlook

Leading Companies and Brands

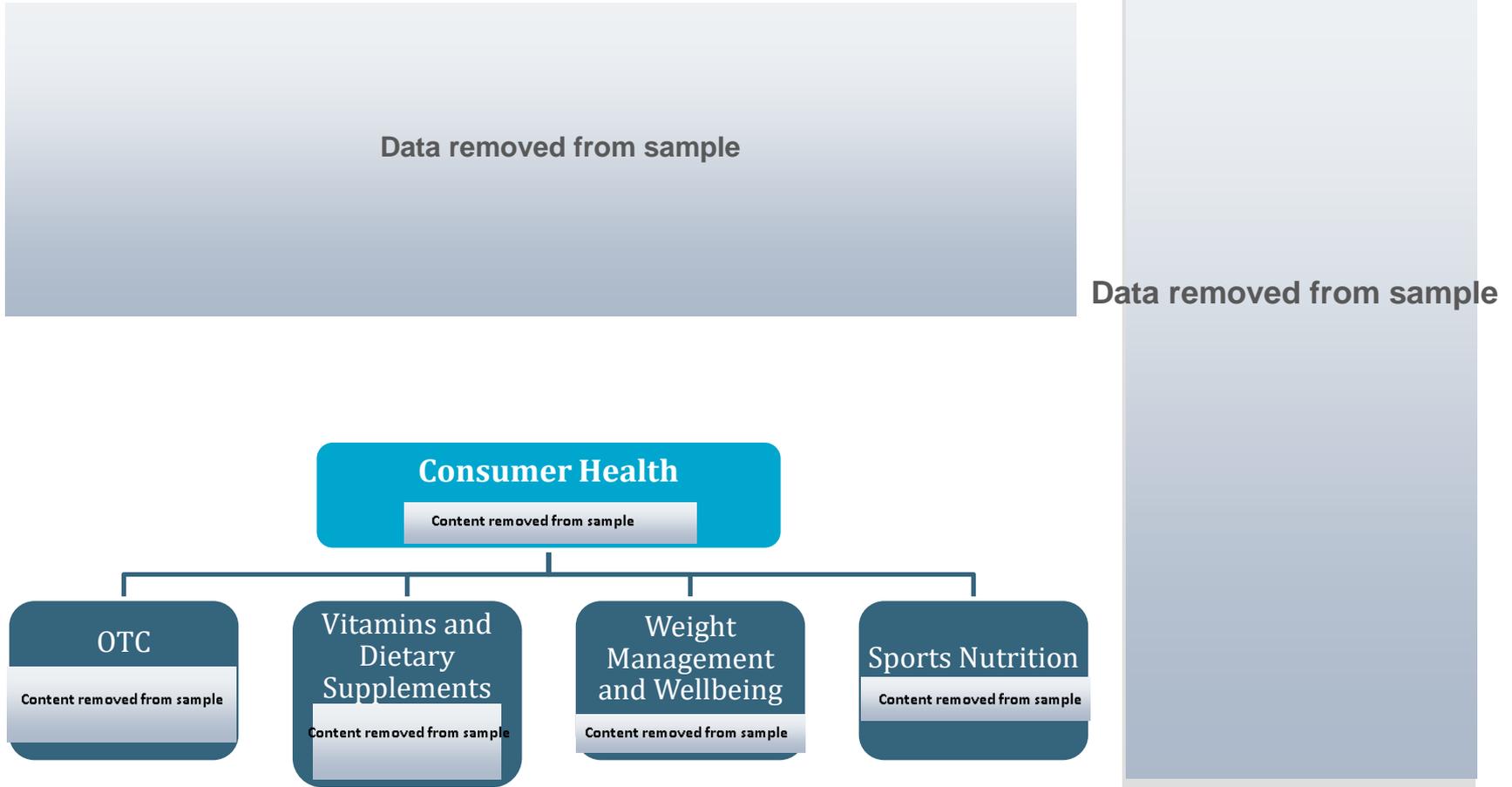
Key Trends for Consumer Health During Coronavirus

Market Snapshots



Scope

- The Consumer Health Industry Overview provides a top-line industry overview of



Key trends shaping consumer health

Trend	Expected long-term implications	Historic impact	Forecast impact
Booming immunity	Immunity functionality, which has emerged during COVID-19 as a central concern for global consumers, is set for strong forecast growth. The expansion of immunity into new formats, ingredients and positionings is likely to drive category innovation into the forecast period.	Moderate impact	Strong impact
Rising interest in general health	As immunity mainstreams, it will also raise focus on and interest in general health as a part of broader, holistic health considerations. During COVID-19, this effect has already occurred, with general health products such as multivitamins seeing strong growth. Expect that to continue in the near term.	Low impact	Moderate impact
Digital health's moment	Distancing and lockdowns accelerated forecast movement towards digital health, with telehealth in particular seeing significant rates of adoption in 2020. Increasing consumer comfort in these platforms is likely to generate connections with and interest in adjacent consumer health products.	Low impact	Strong impact
Further blurring category lines	Consumer health has been beset by category blurring for years now, and even the newest trends are accelerating this trend, with new immunity products blurring between sleep, stress, general health, digestive health, and anti-inflammation, among others. This trend will continue apace into the forecast.	Moderate impact	Strong impact
The rise of mental health	The sharp changes brought on by COVID-19 have stimulated a rising recognition of the mental aspects of healthy living, surging the demand for behavioural solutions as well as adaptogenic supplements. Given difficulties in changing the direct stressors in modern life, expect further development of products intended to meet these sensitive needs.	Low impact	Strong impact

COVID-19's impact on consumer health

Immunity demand set for strong near-term performance

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Limited movement and lockdowns suppress sales for many categories

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Leapfrogging into e-commerce

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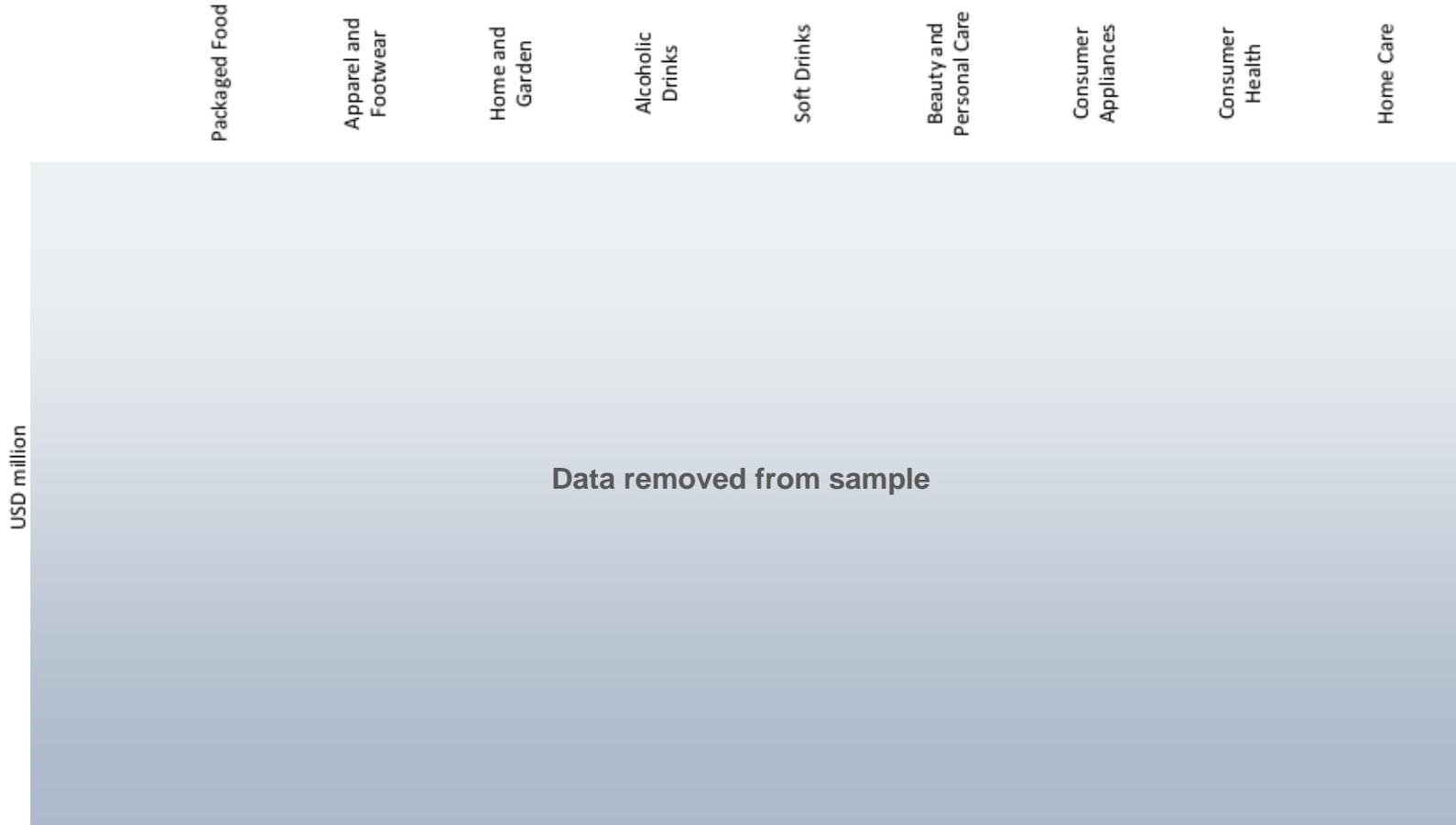
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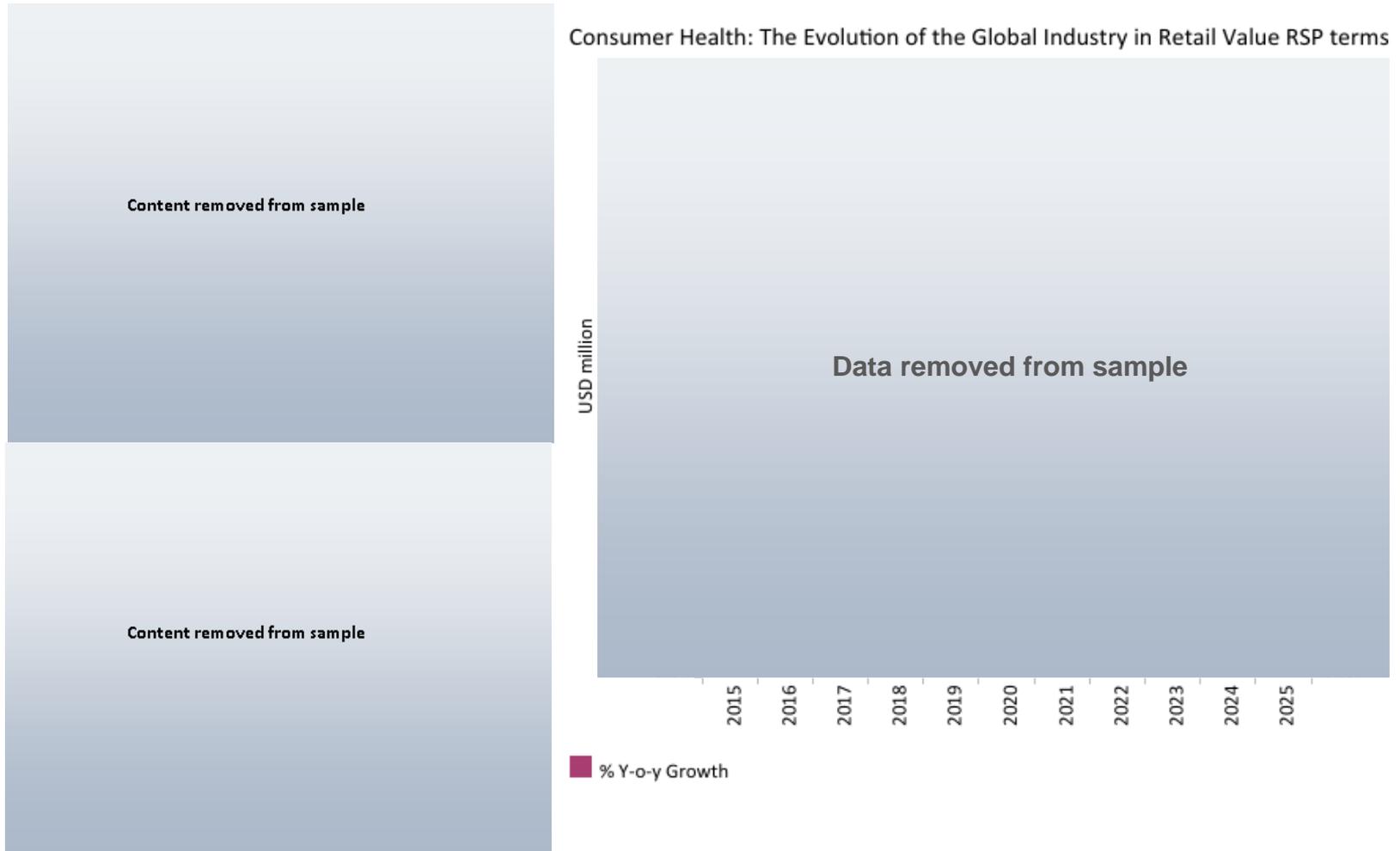


Consumer health in context

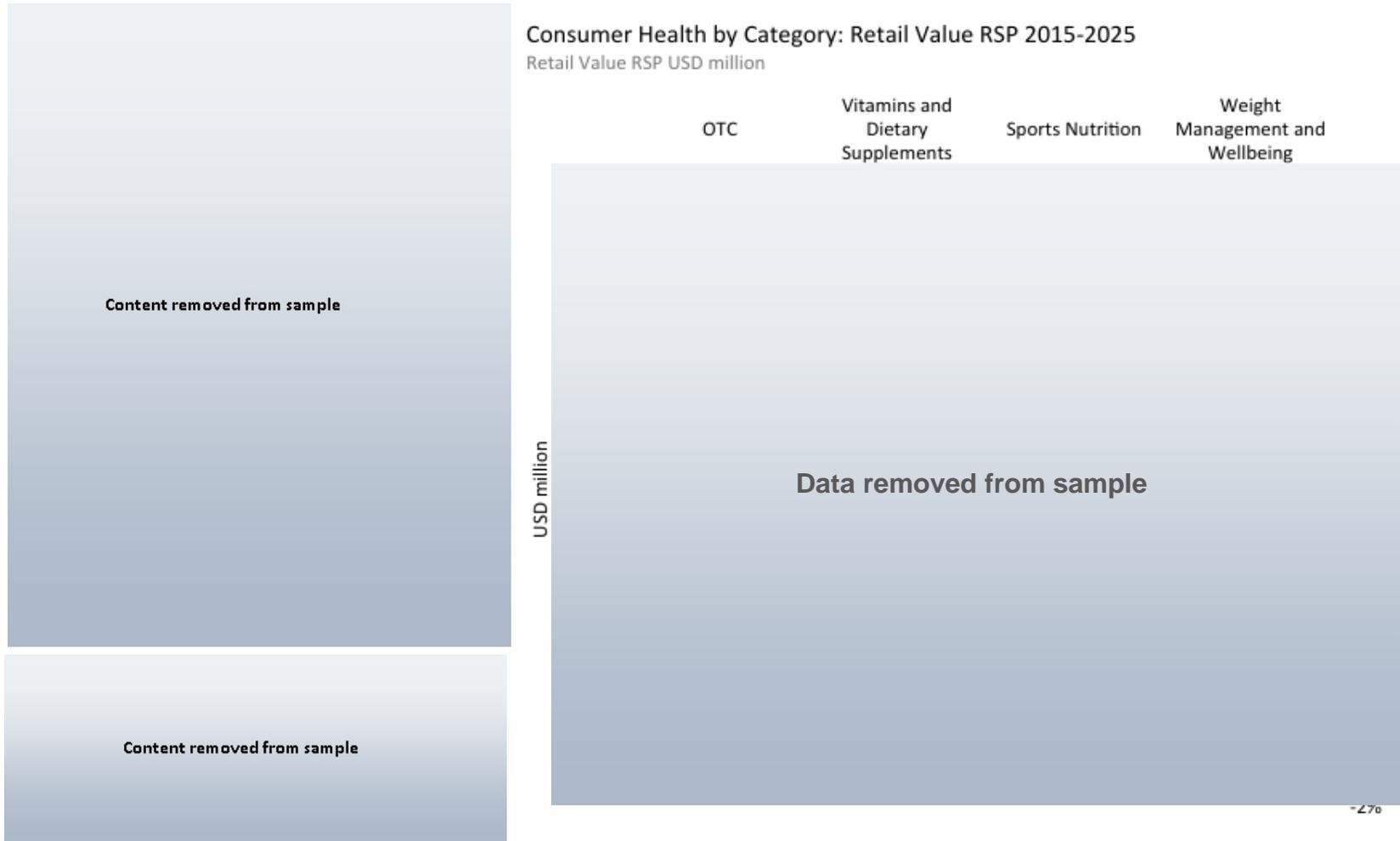
World: Consumer Goods by Industry Size and Growth 2015-2020



Global consumer health sees slight softening of growth in 2020

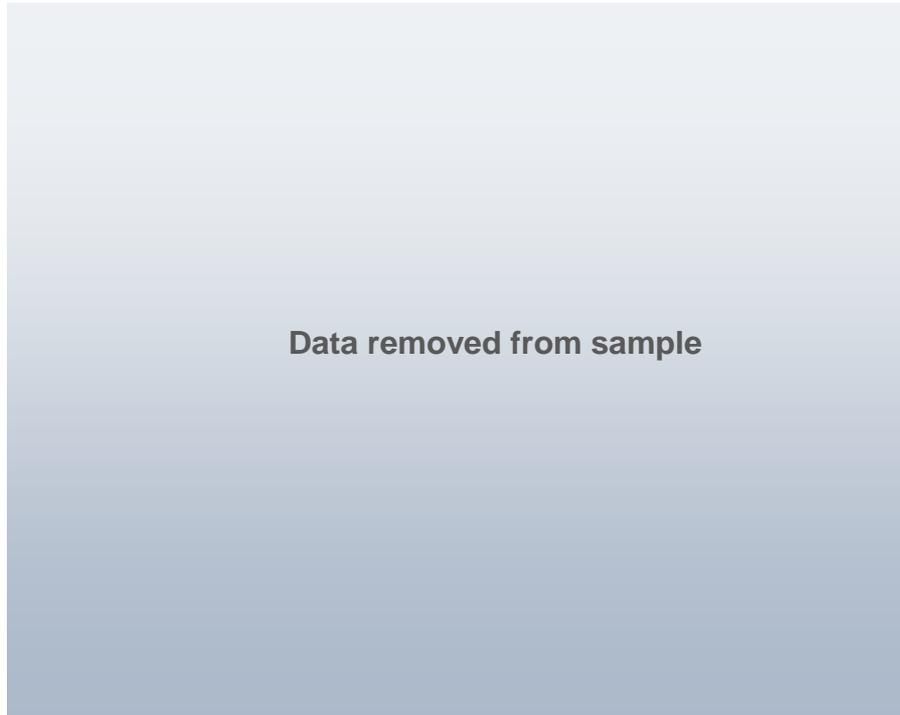


Effects of COVID-19 are starkly different among categories



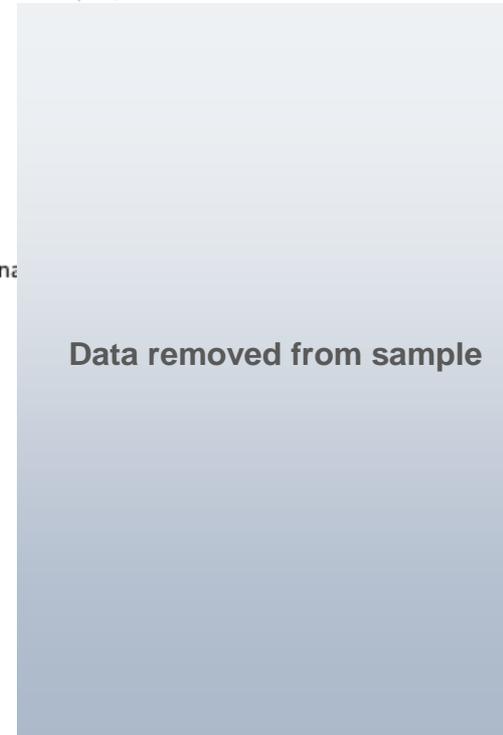
Despite 2020 decline, long-term growth of sports nutrition still strong

Consumer Health: Map Showing the Fastest Growing Category over the Historic Period in Each Market



Consumer Health: Top 20 Markets 2020
USD million USD Per Capita/Per Household

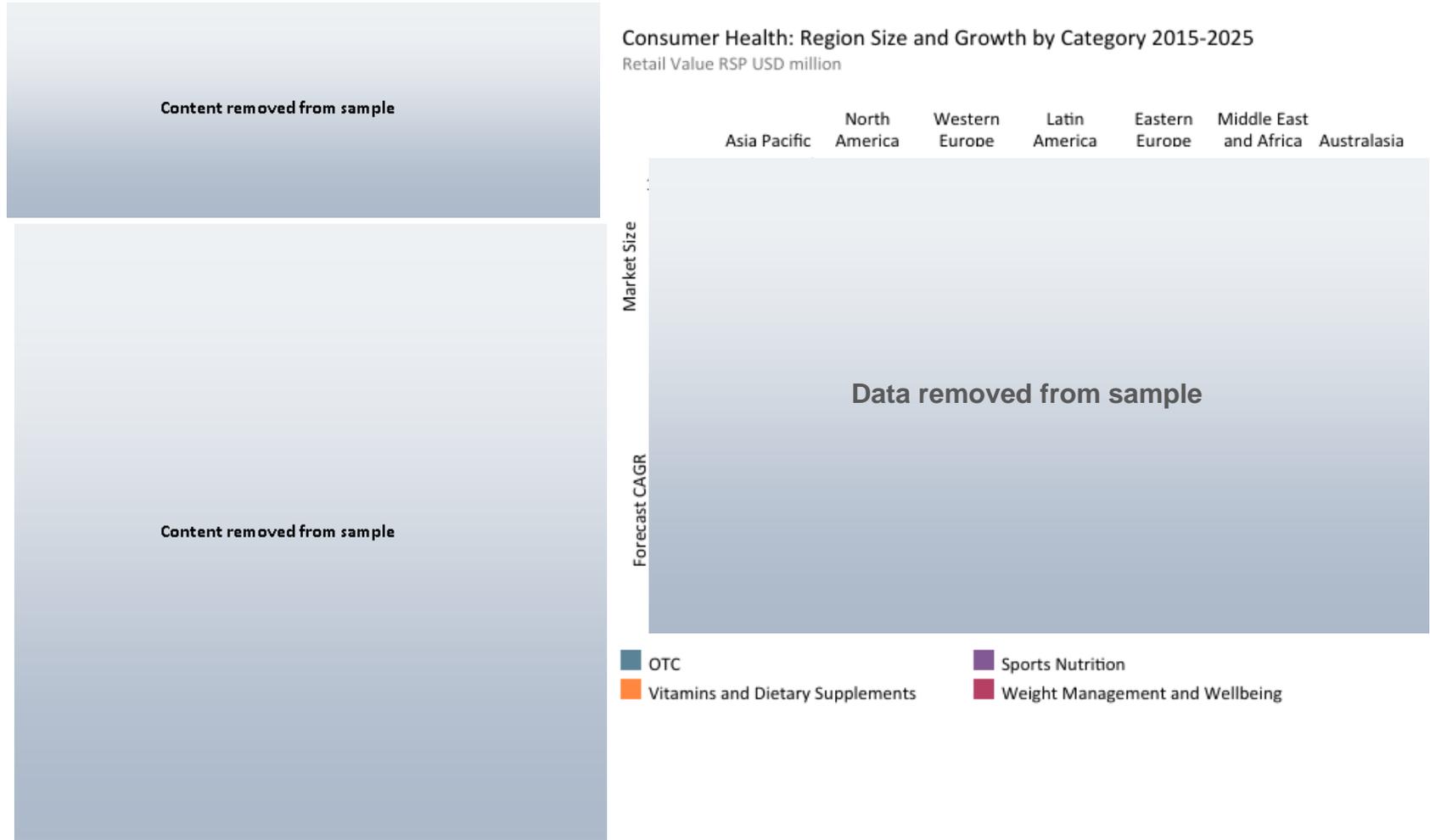
- US
- Australia
- Finland
- Norway
- Japan
- Taiwan
- Switzerland
- Hong Kong, China
- Sweden
- Singapore
- Canada
- Italy
- South Korea
- Belgium
- Denmark
- Austria
- UK
- Germany
- New Zealand
- Ireland



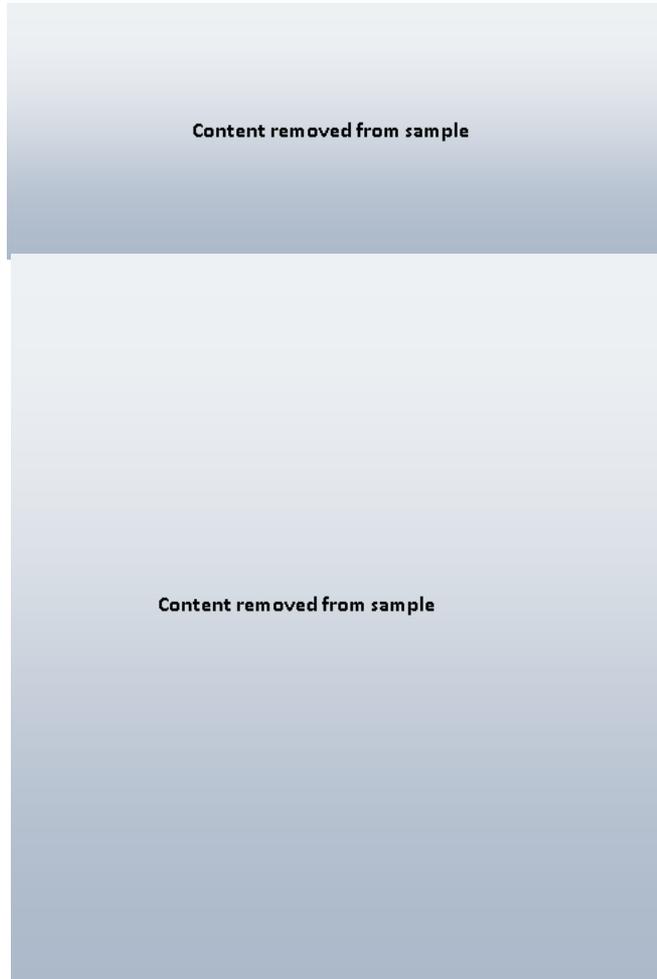
- OTC
- Vitamins and Dietary Supplements
- Weight Management and Wellbeing

- Sports Nutrition

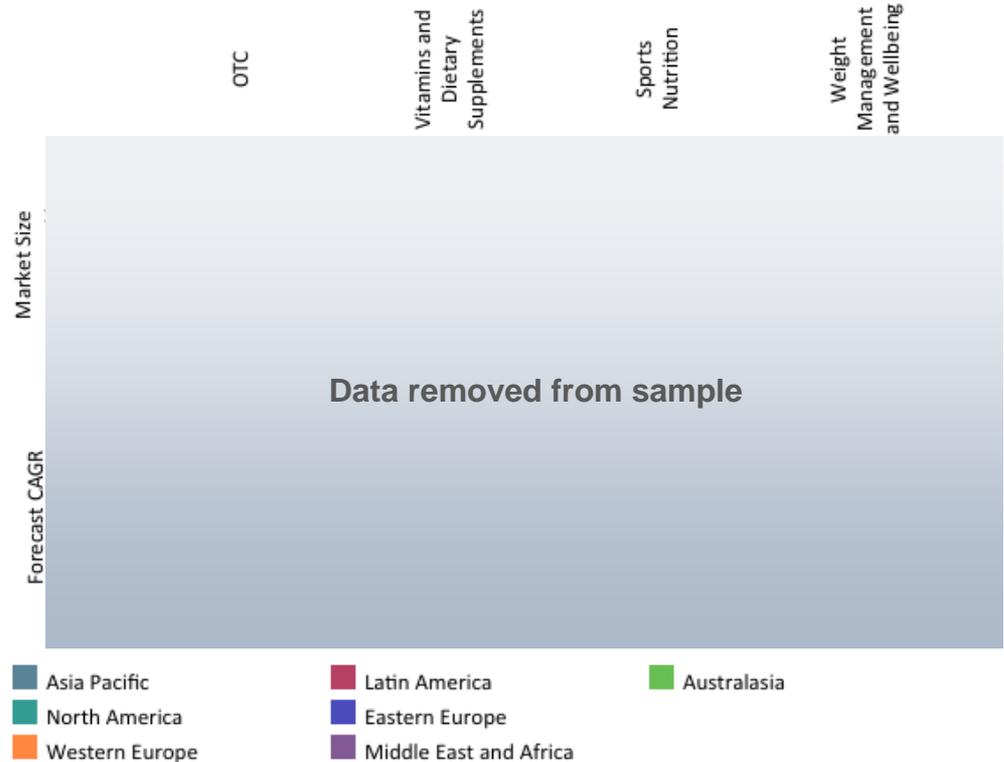
Asia Pacific's sales blip in 2020 unlikely to continue over the forecast



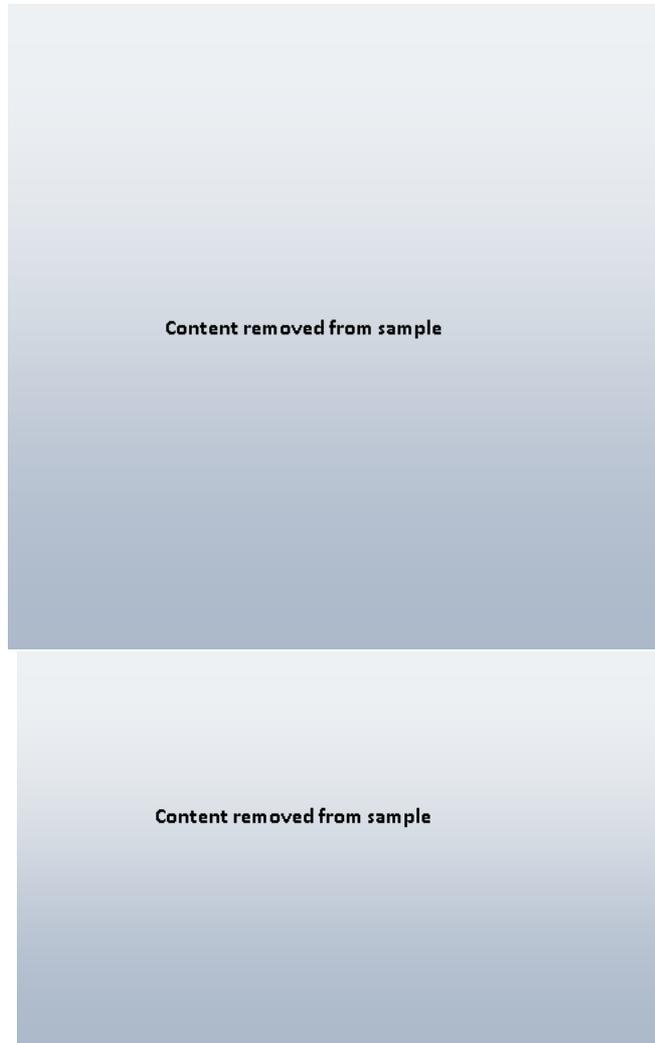
Parity of VDS and OTC tells different stories of the future of the industry



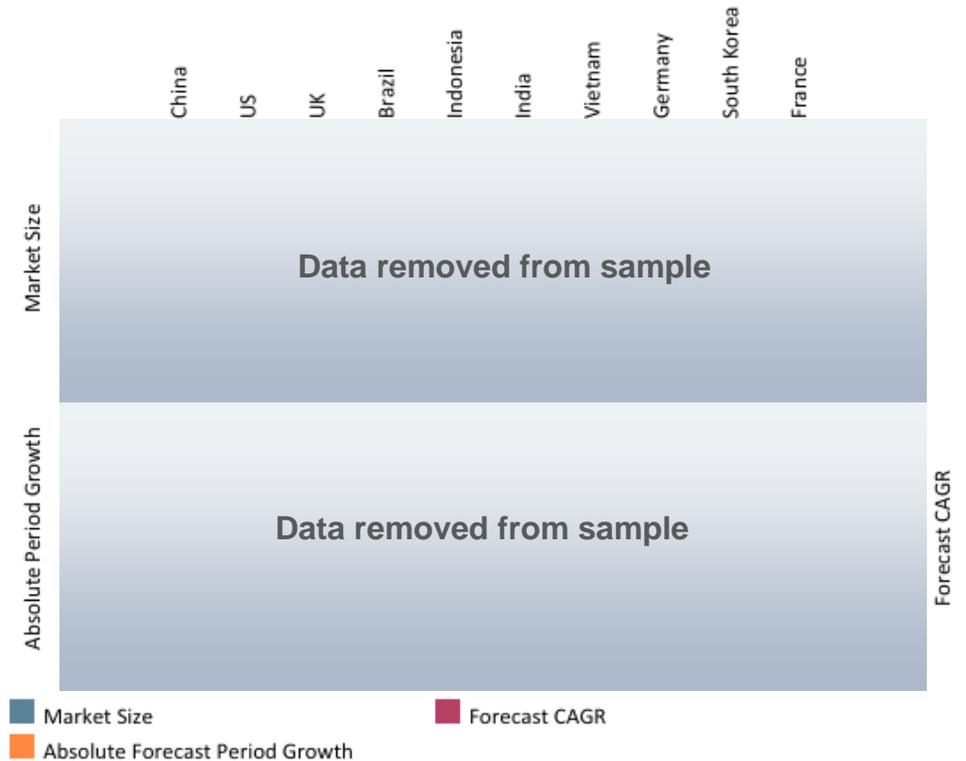
Consumer Health: Region Size and Growth by Category 2015-2025
Retail Value RSP USD million



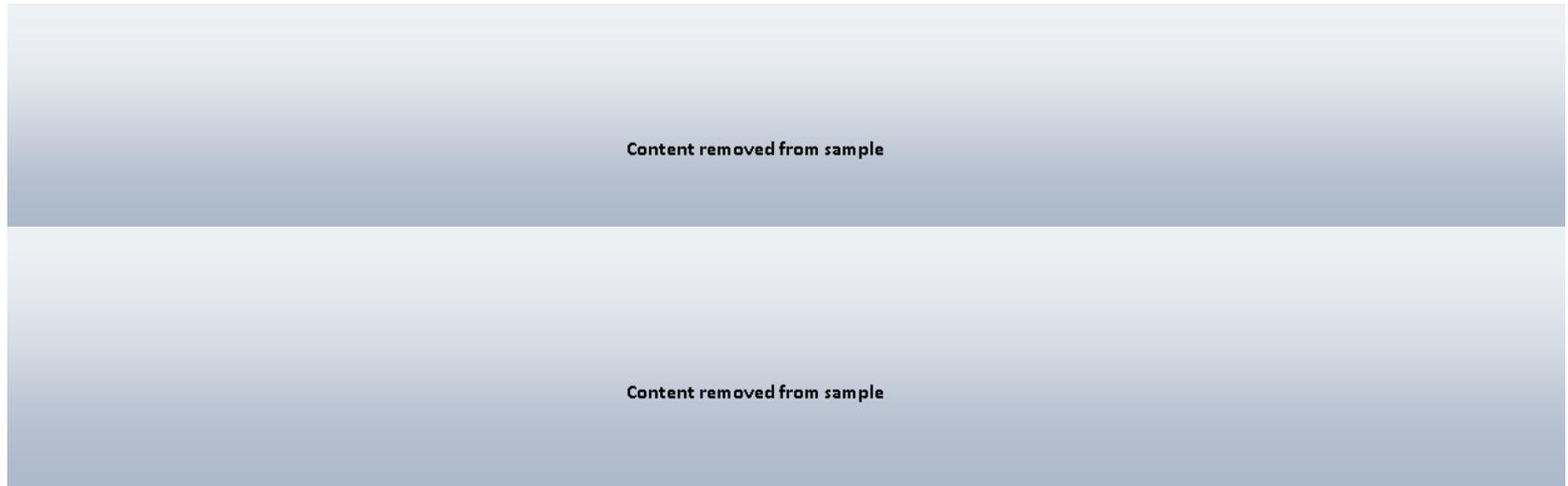
China rebound to lead Asia's consumer health resurgence in forecast



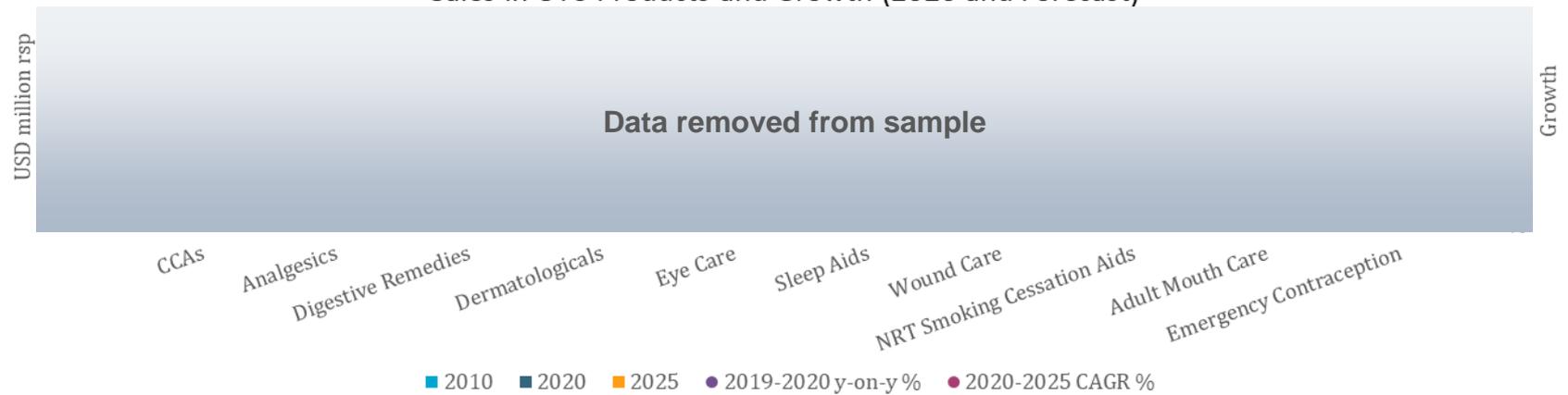
Consumer Health: Top 10 Markets by Forecast Absolute Growth 2020-2025
Retail Value RSP USD million



How to evaluate the global outlook for OTC drugs

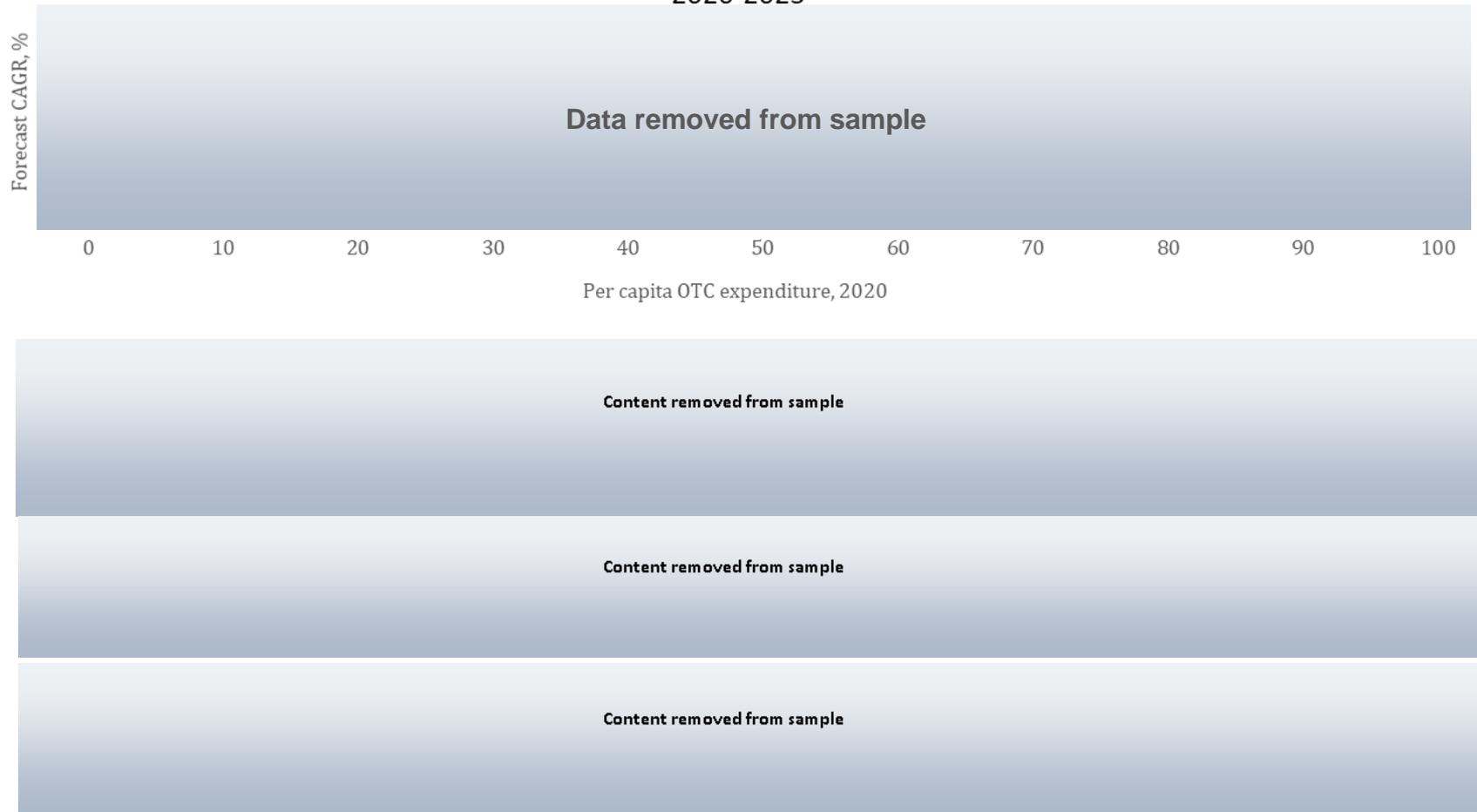


Sales in OTC Products and Growth (2020 and Forecast)



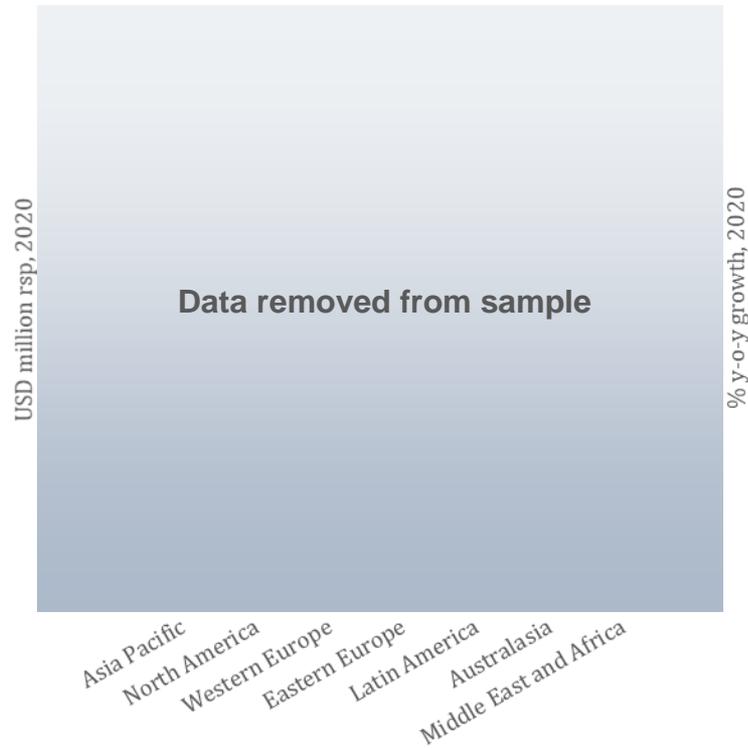
Despite COVID-19, OTC forecasts will eventually settle at historic norms

OTC Drugs, Regional Market Size and per Capita Expenditure, 2020, and Forecast CAGR %
2020-2025



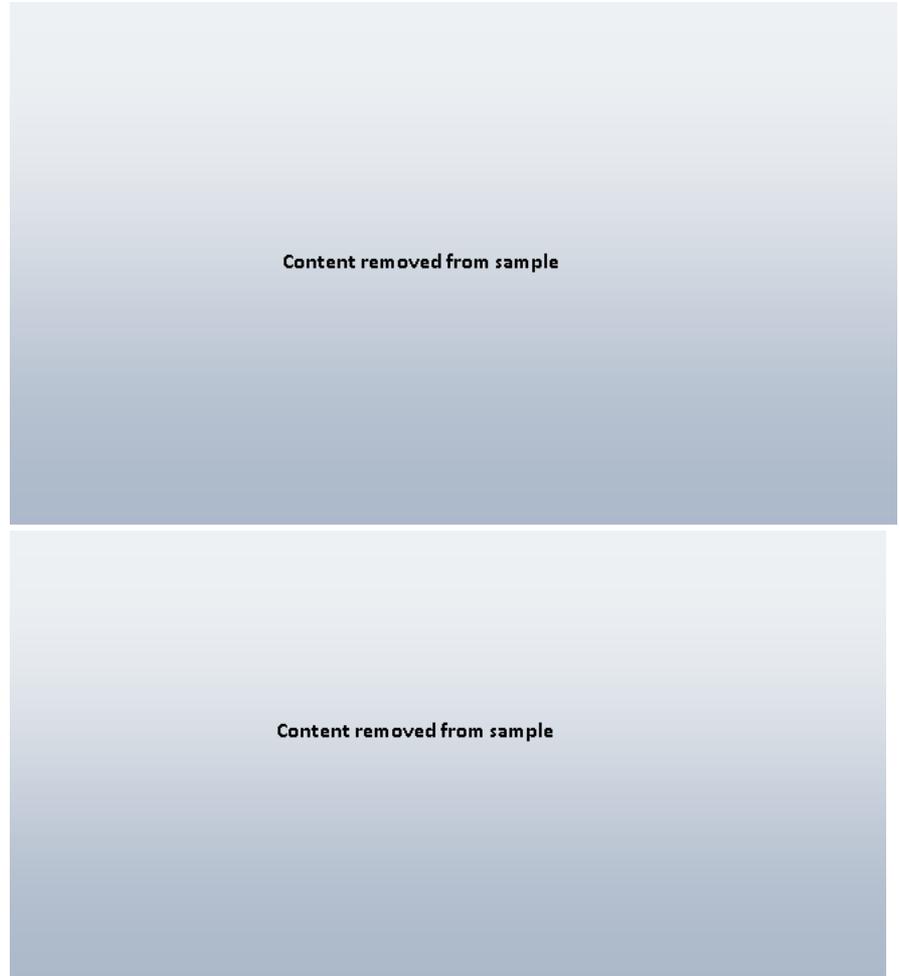
Immunity sustains VDS growth globally in 2020, but can it continue?

Growth in Immunity and Other VDS, 2020

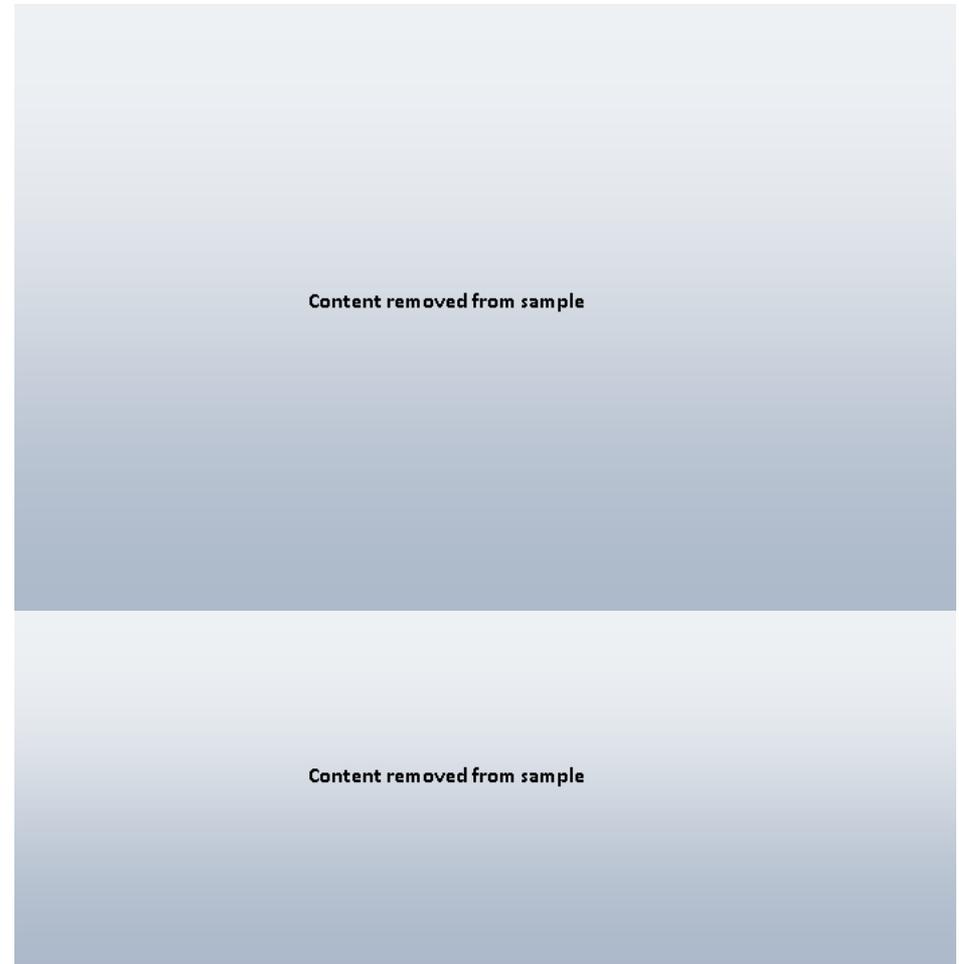
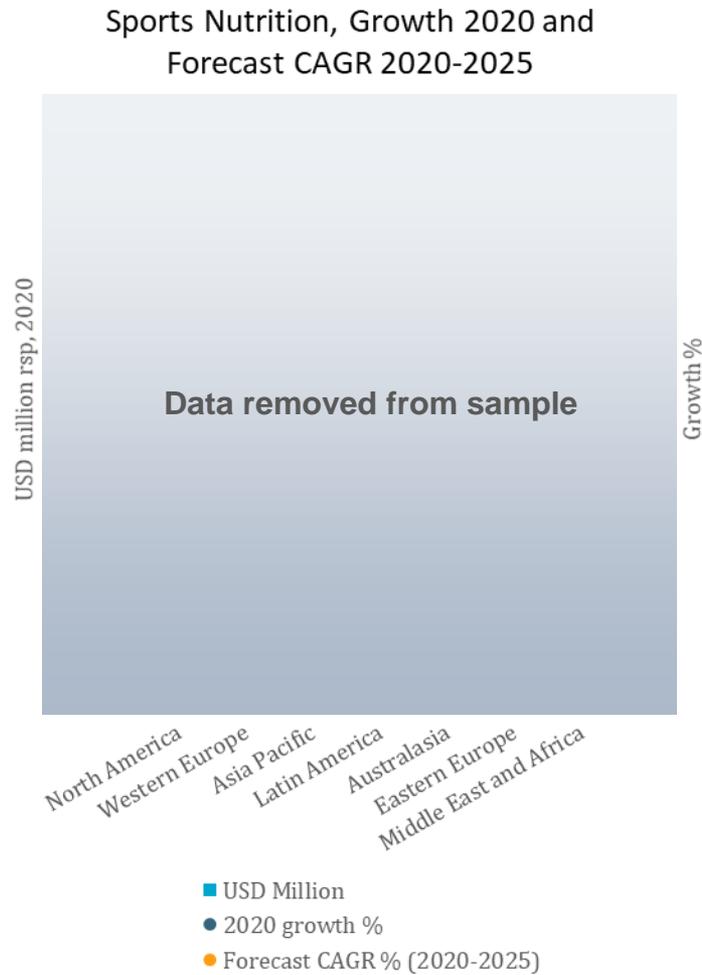


- Immunity-Positioned VDS
- Other VDS
- Immunity VDS Growth %, 2020
- Other VDS Growth %, 2020

Note: Immunity-Positioned Vitamins and Dietary Supplements includes Immune System Dietary Supplements, Vitamin C and Vitamin D.

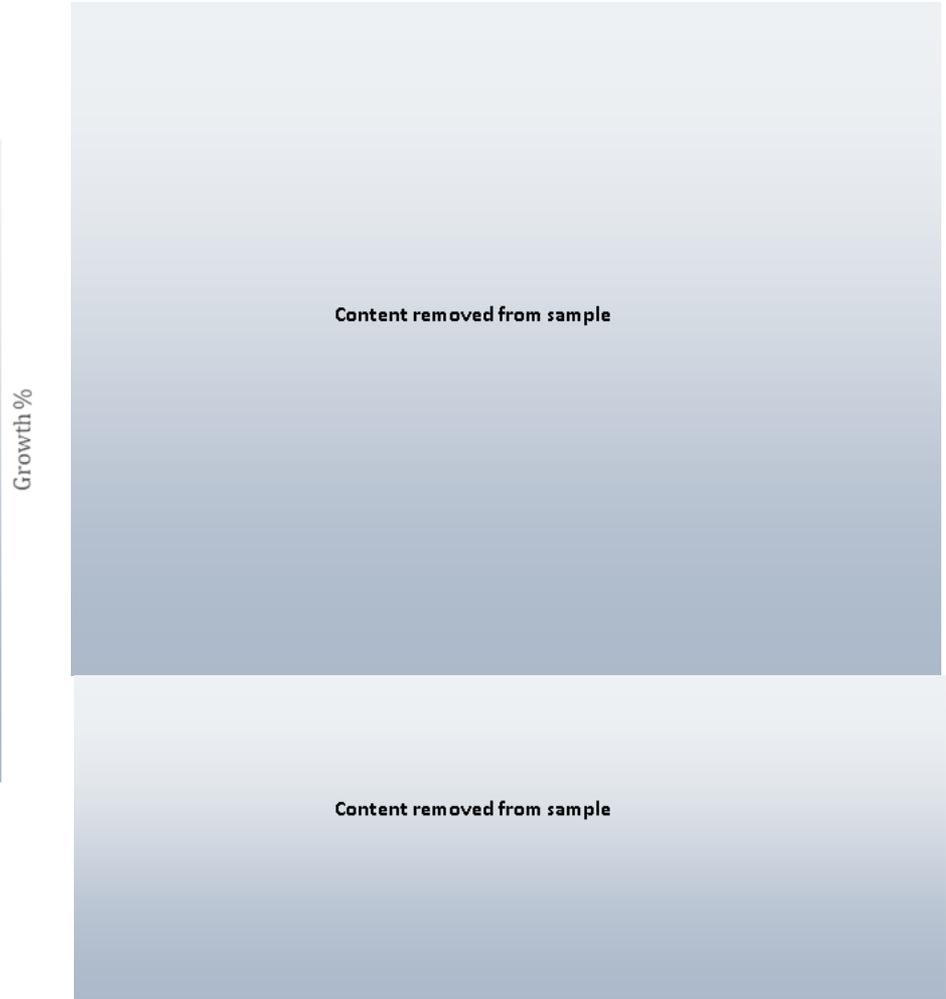
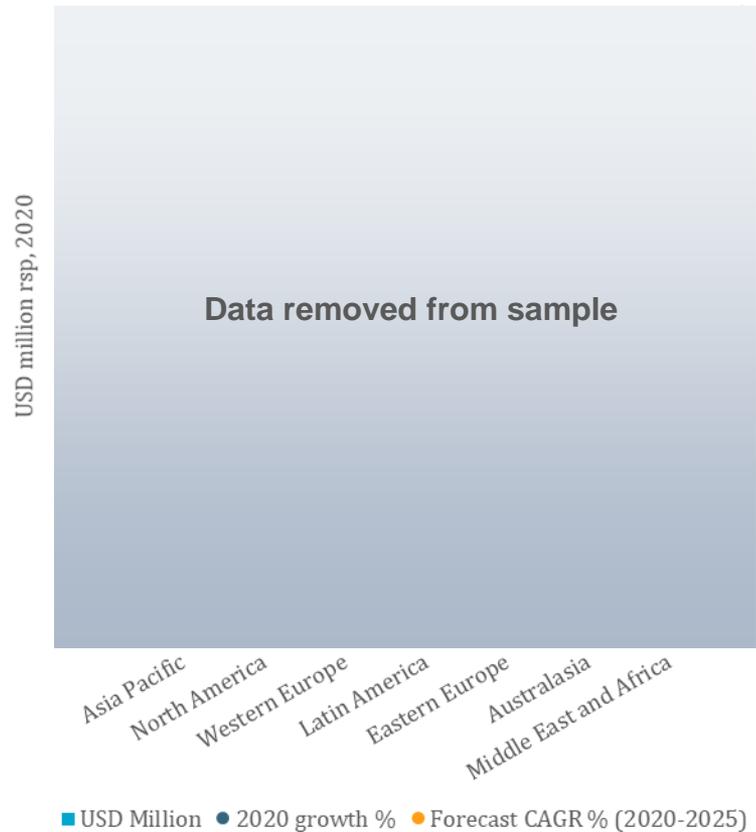


Sports nutrition suffers in 2020, likely to rebound quickly in forecast

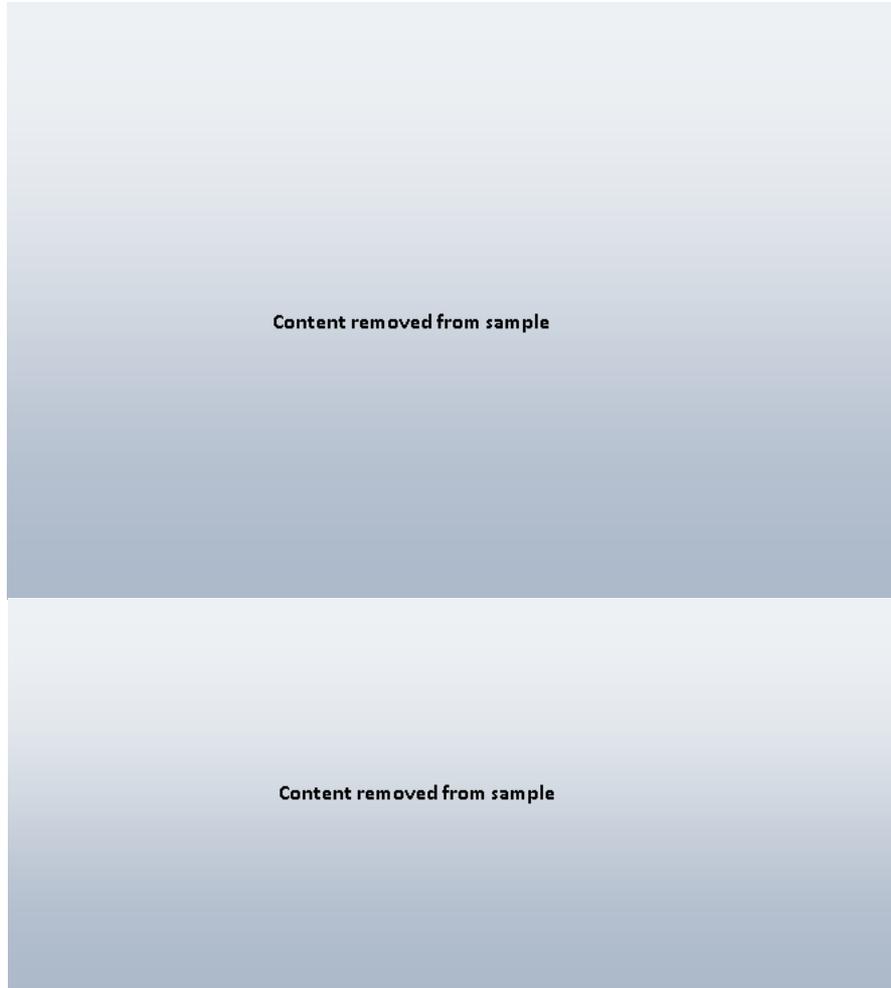


COVID-19 not kind to weight management either, but rebound likely

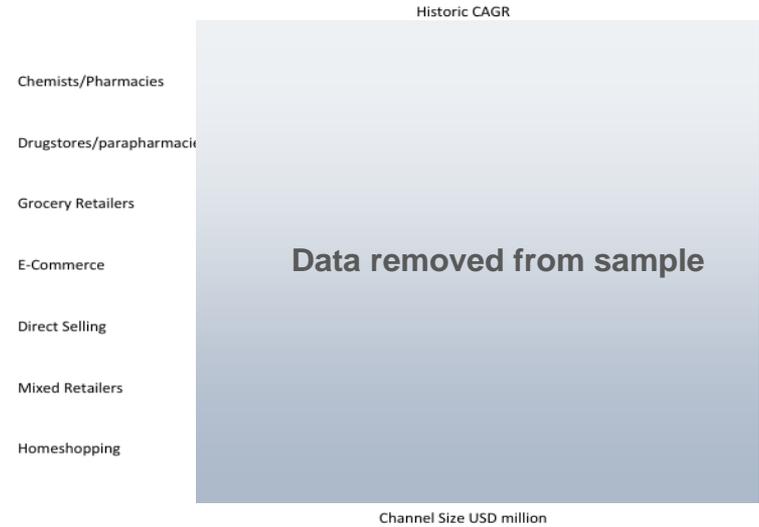
Weight Management and Wellbeing,
Growth 2020 and Forecast CAGR
2020-2025



Store-based shutdowns and social distancing push sales to e-commerce

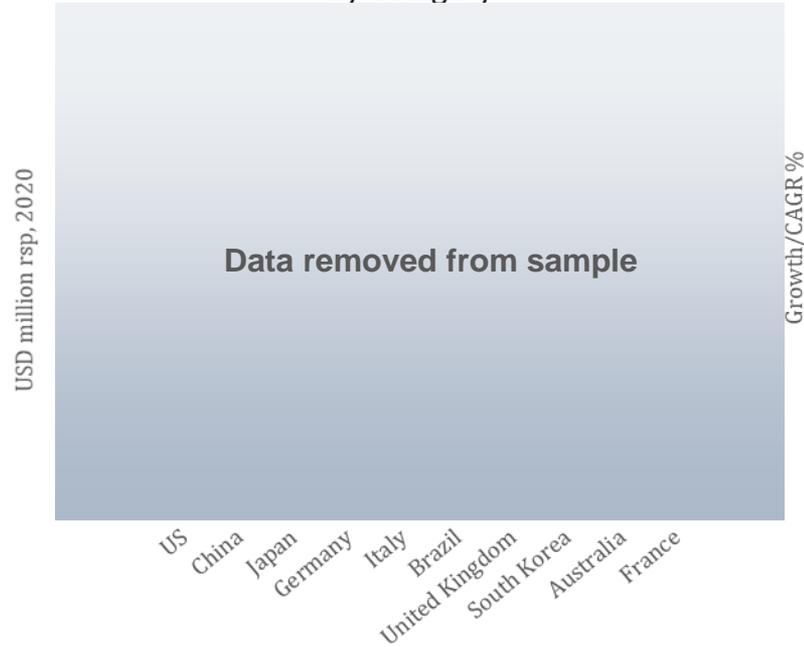


Consumer Health: Retail Distribution by Outlet 2020

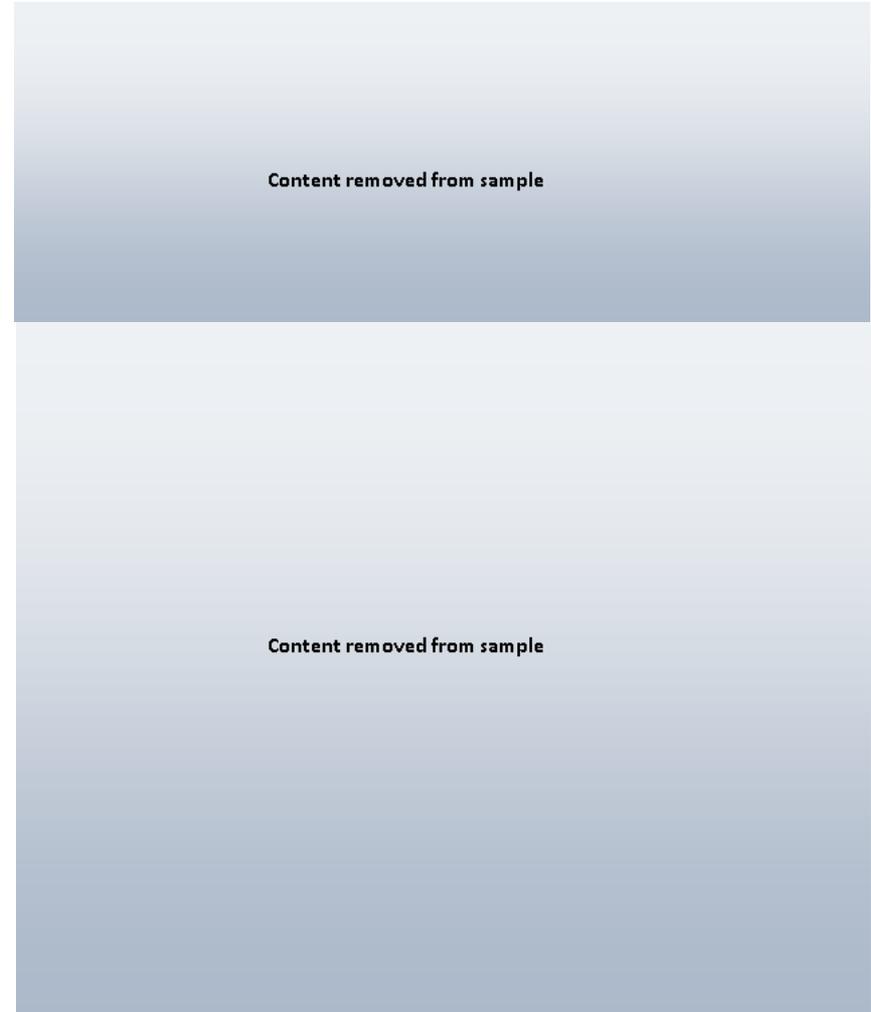


Consumer health in 2025: Re-emergence of innovation and outreach

Leading Consumer Health Countries, Growth 2020, and Forecast CAGR 2020-2025 by Category



- Consumer Health, 2020
- OTC Forecast CAGR % (2020-2025)
- VDS Forecast CAGR % (2020-2025)
- Sports Nutrition Forecast CAGR % (2020-2025)
- Weight Management and Wellbeing Forecast CAGR % (2020-2025)



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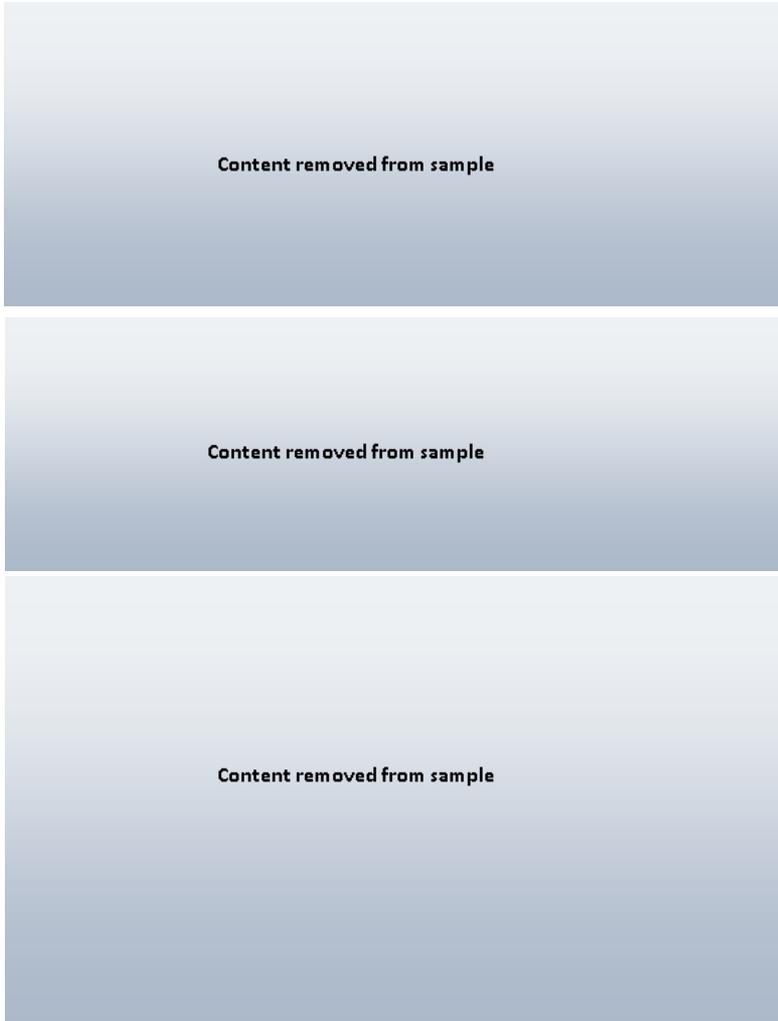
Leading Companies and Brands

Key Trends for Consumer Health During Coronavirus

Market Snapshots

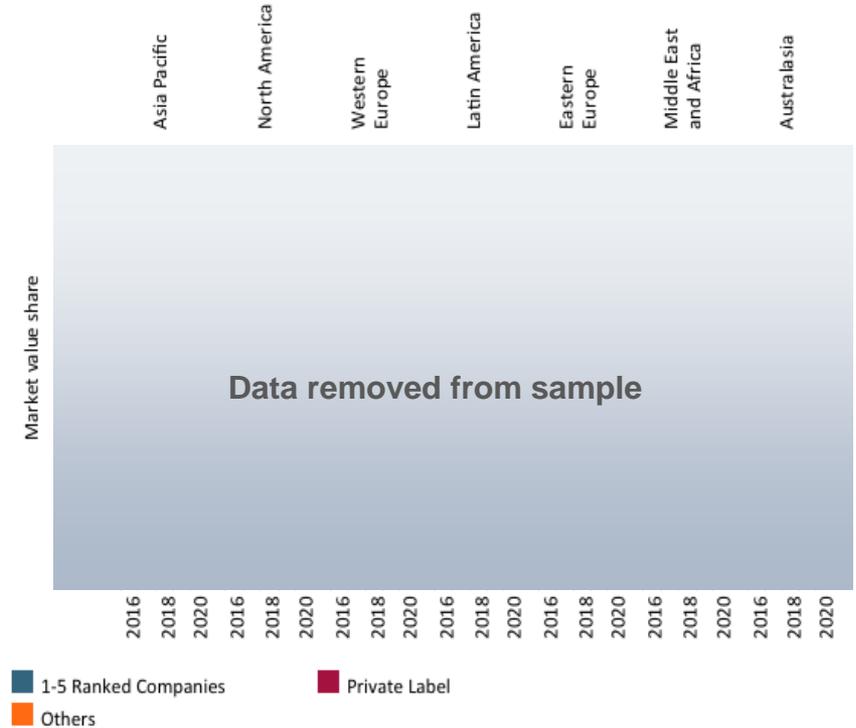


COVID-19 limits gains by upstarts, provides promising area for acquisitions



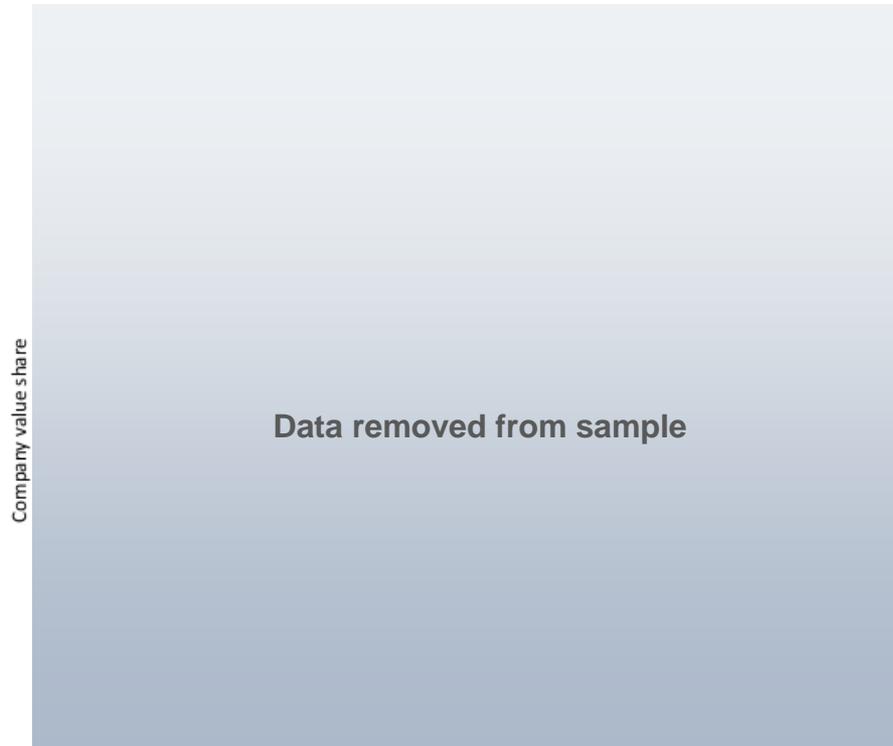
Consumer Health: Market Fragmentation by Region 2015-2020

% market value share - USD million

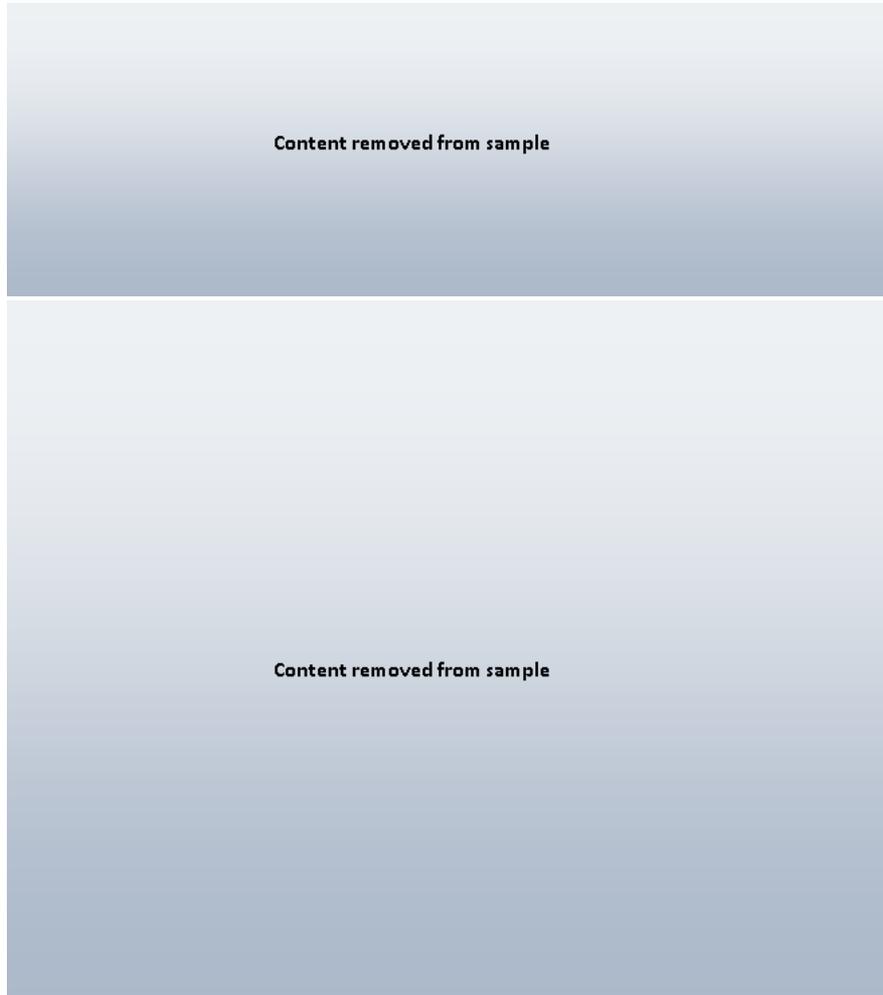


Performance in 2020 among leaders depends on COVID-19 compatibility

Consumer Health: Top 10 Companies 2015-2020
% company value share - USD million



Portfolio diversification does not tell the whole story during COVID-19



Sales of Top 10 Consumer Health Companies by Category 2020

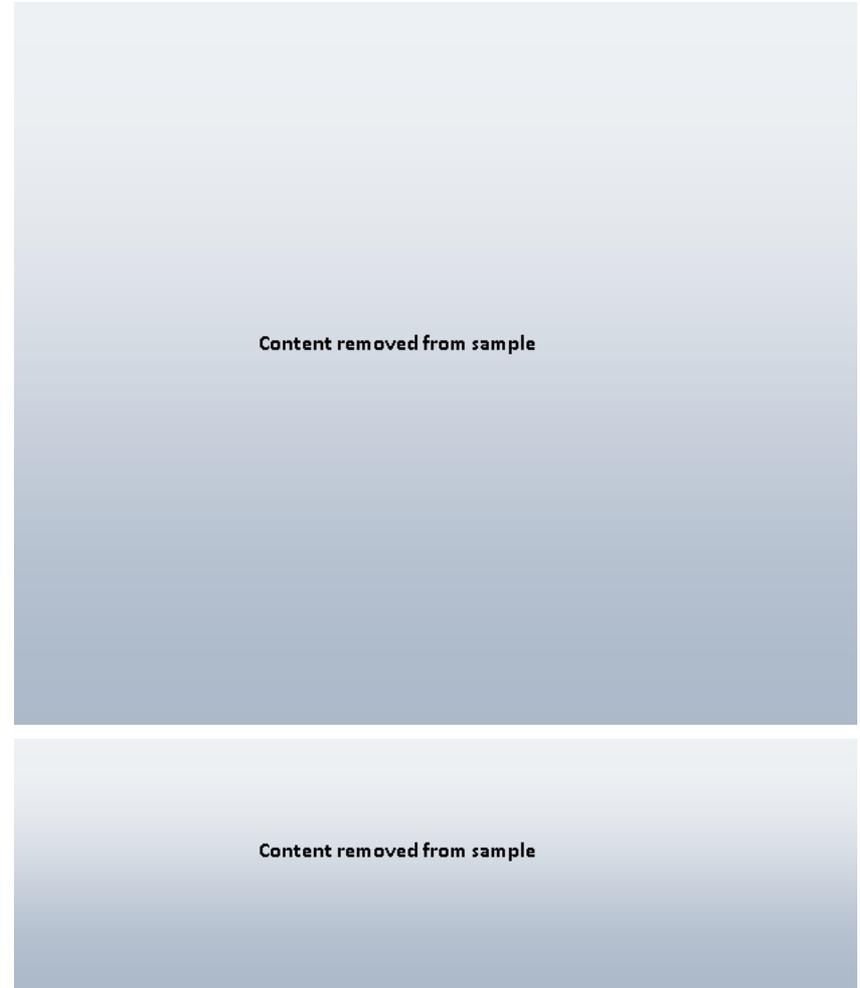
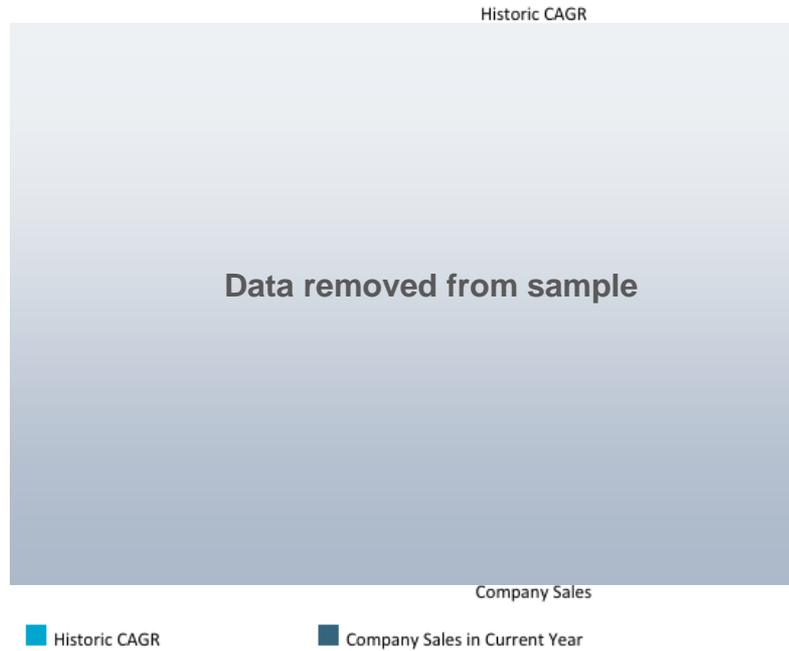


USD million

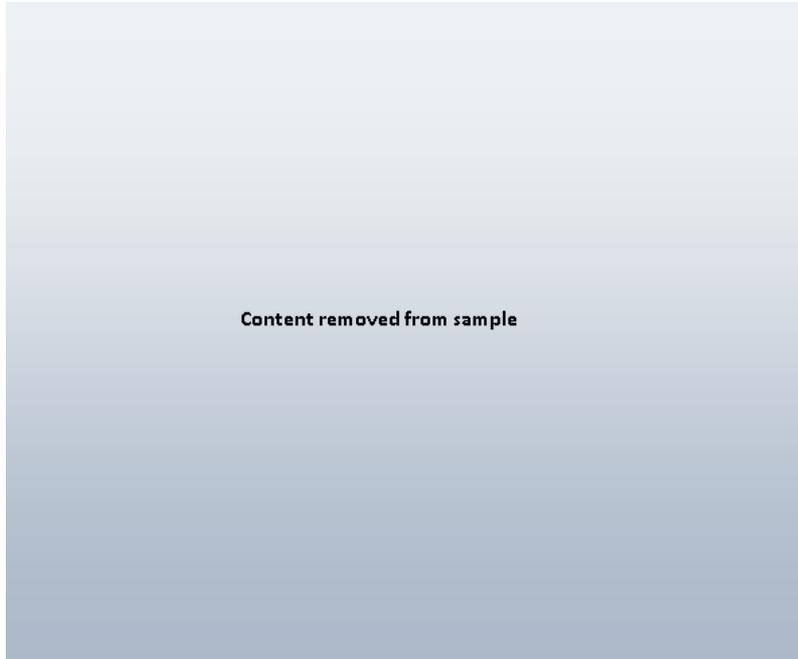
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- Sports Nutrition
- Weight Management and Wellbeing

Top growing companies cluster in prevention categories

Consumer Health: Top Companies Sales in 2020 and 2015-2020
% CAGR historic growth - USD million

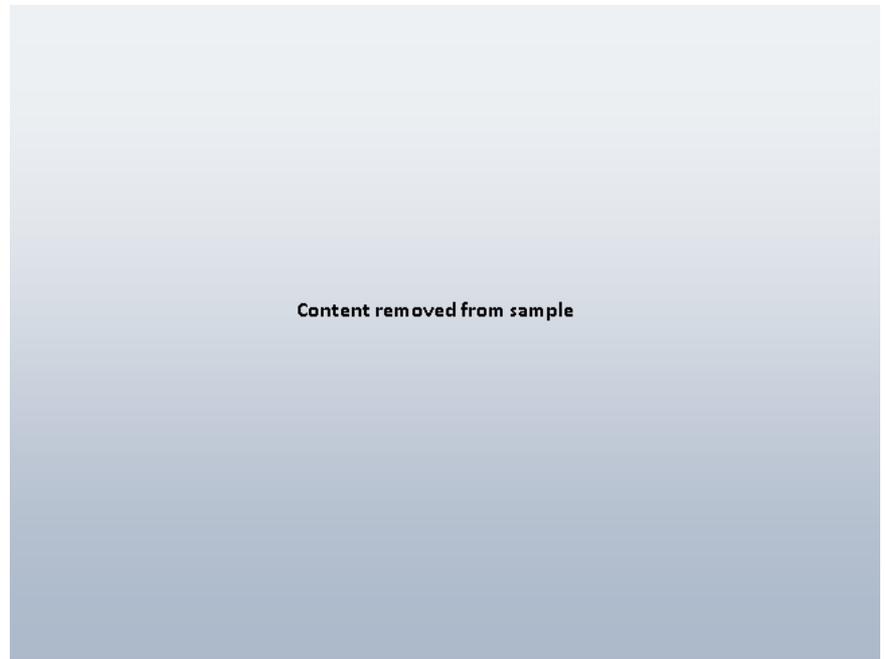
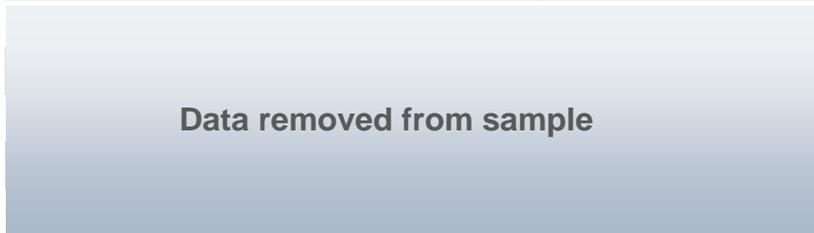


Market fragmentation: OTC products



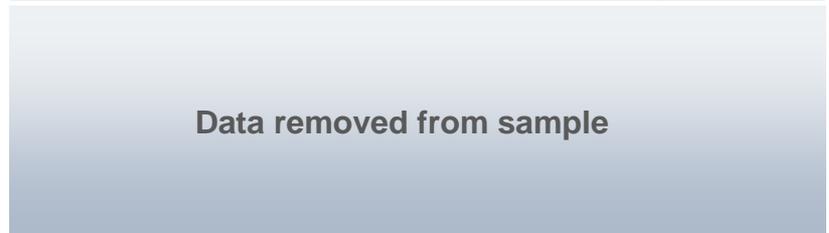
Top OTC Companies Retail Value Share 2020

Company (GBO)	% share
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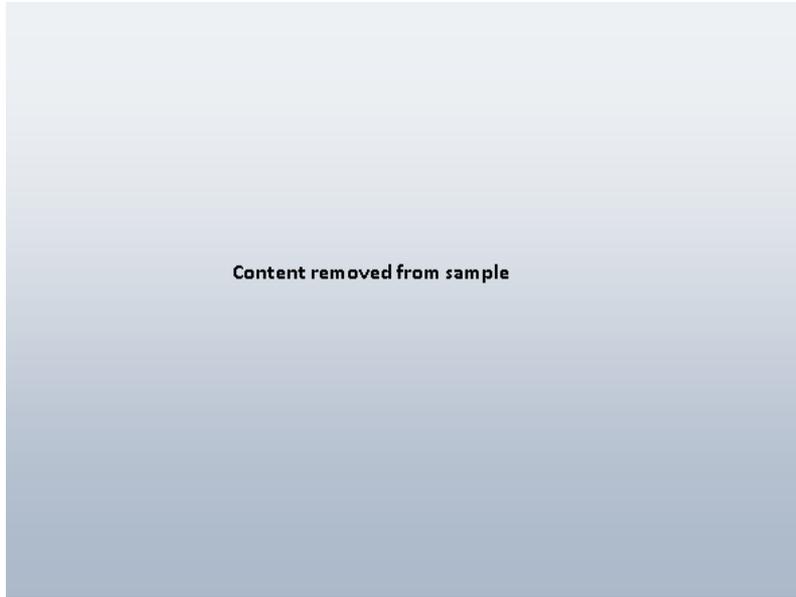


Top OTC Brands Retail Value Share 2020

Brand	Company (GBO)	% share
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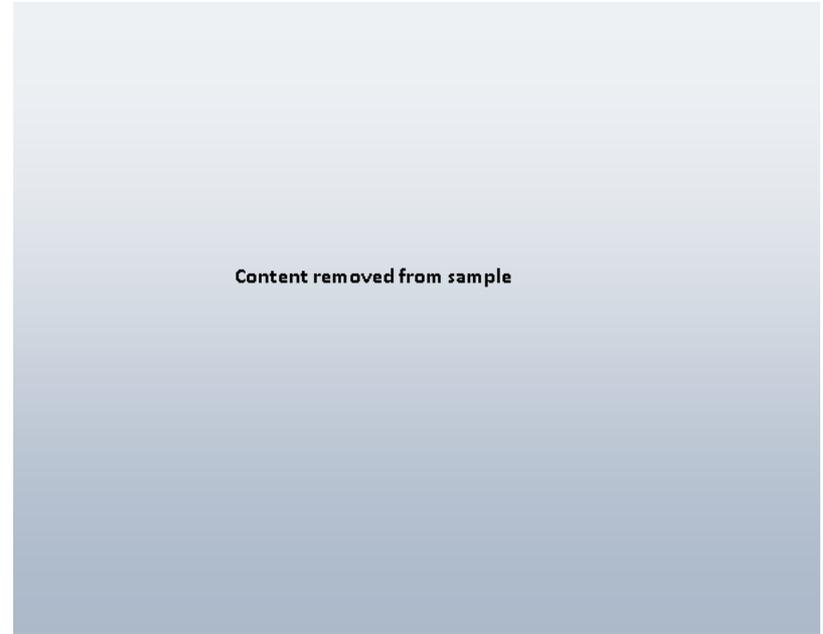


Market fragmentation: vitamins and dietary supplements



Top VDS Companies Retail Value Shares 2020

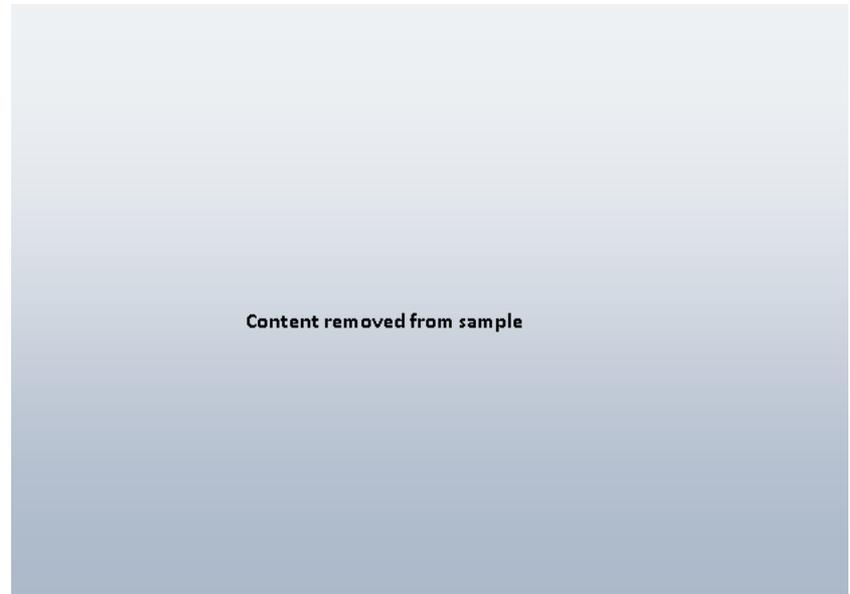
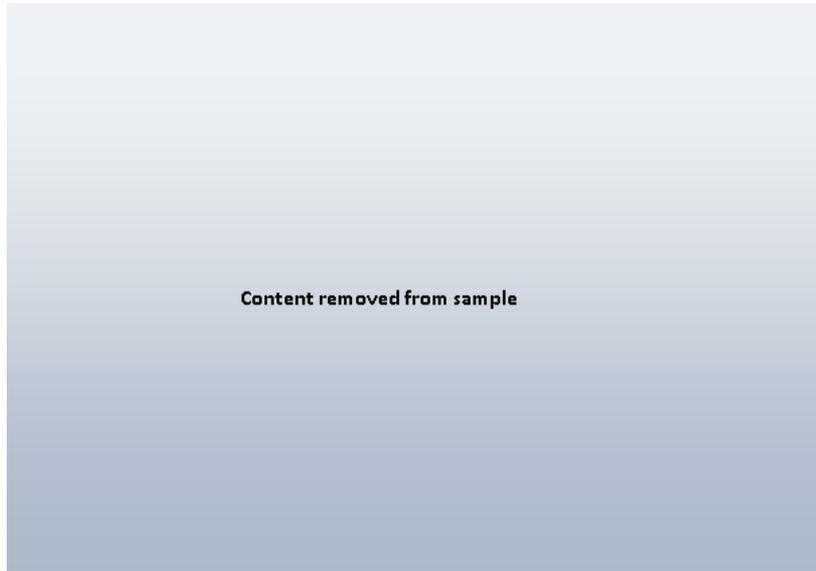
Company (GBO)	% share
Data removed from sample	



Top VDS Brands Retail Value Share 2020

Brand	Company (GBO)	% share
Data removed from sample		

Market fragmentation: sports nutrition



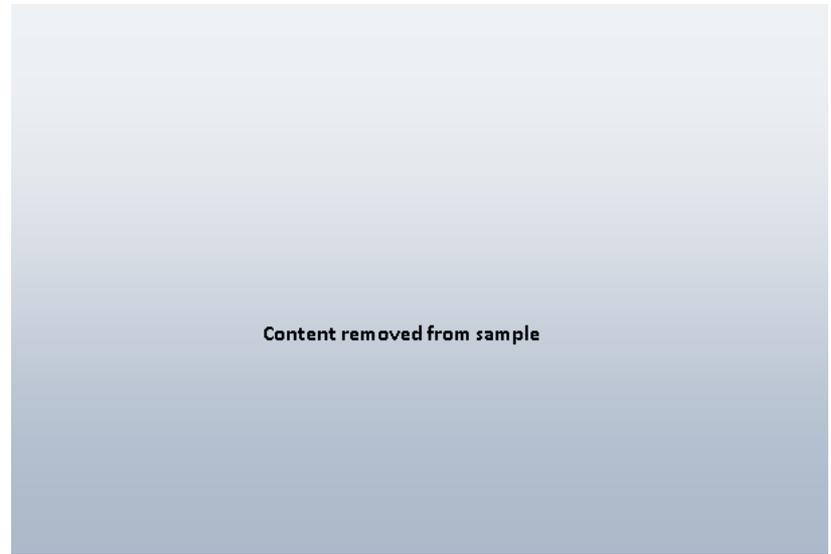
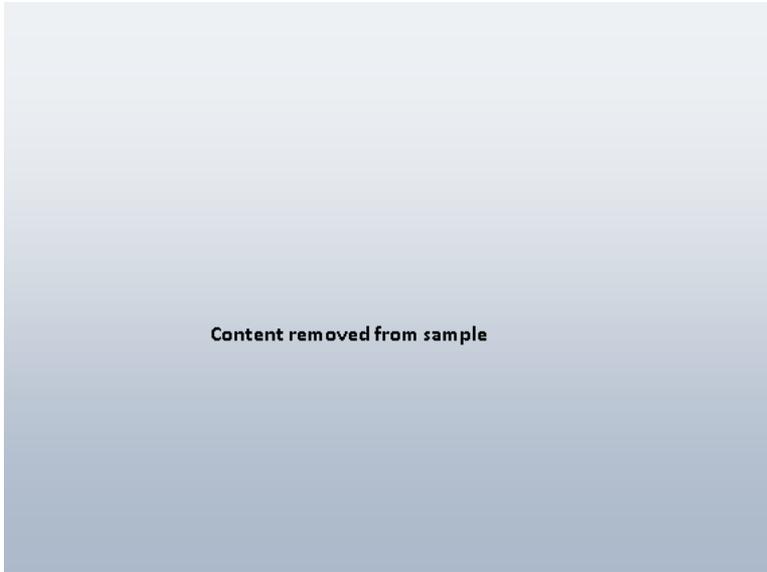
Top Sports Nutrition Companies Retail Value Share 2020

Company (GBO)	% share
Data removed from sample	

Top Sports Nutrition Brands Retail Value Share 2020

Brand	Company (GBO)	% share
Data removed from sample		

Market fragmentation: weight management and wellbeing



Top WMW Companies Retail Value Share 2020

Company (GBO)	% value
Data removed from sample	

Top WMW Brands Retail Value Share 2020

Brand	Company (GBO)	% value
Data removed from sample		

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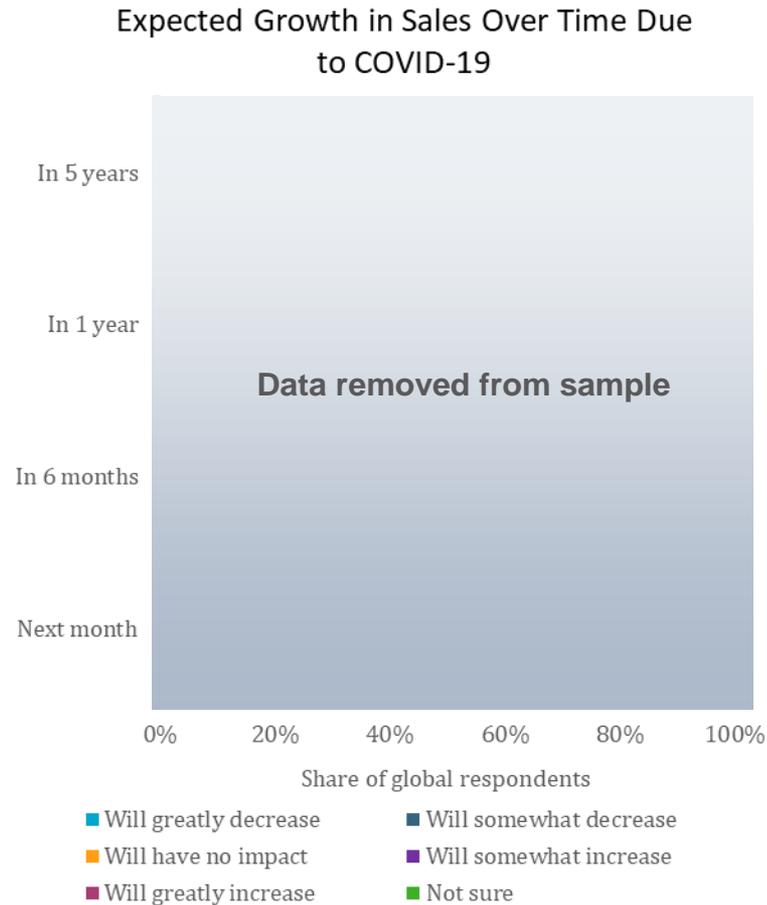
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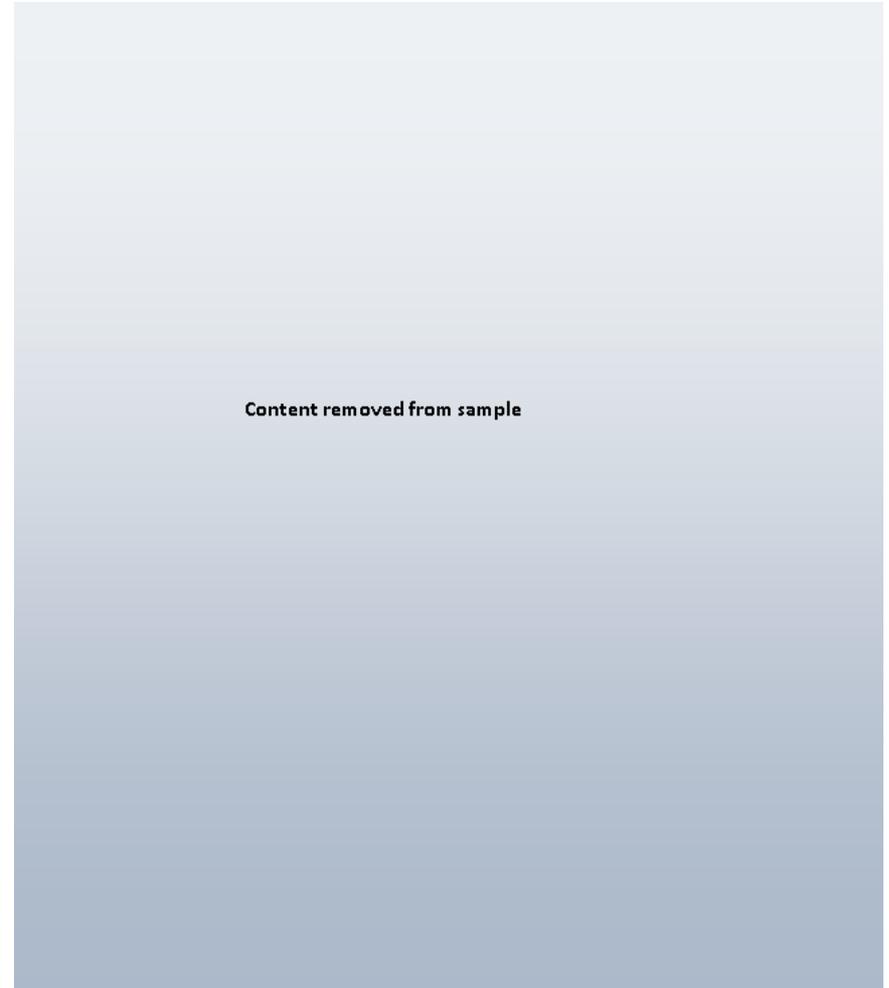
Market Snapshots



COVID-19 has broken industry consensus on future growth



Source: Euromonitor International Voice of the Industry: Consumer Health Survey, May 2020; survey of 449 consumer health experts



Consumer health is among the industries most unaffected by COVID-19

WORLD PRE-C19 FORECASTS SCENARIO FORECAST I

Industry Level Retail Sales 2019-2020, % growth, 2019 constant prices, fixed year exchange rate ⓘ

- Personal Accessories
- Apparel and Footwear
- Luxury Goods
- Eyewear
- Consumer Appliances
- Consumer Electronics
- Home and Garden
- Beauty and Personal Care
- Tobacco
- Alcoholic Drinks
- Soft Drinks
- Consumer Health
- Pet Care
- Home Care
- Retail Tissue and Hygiene
- Packaged Food
- Toys and Games
- Hot Drinks
- Fresh Food

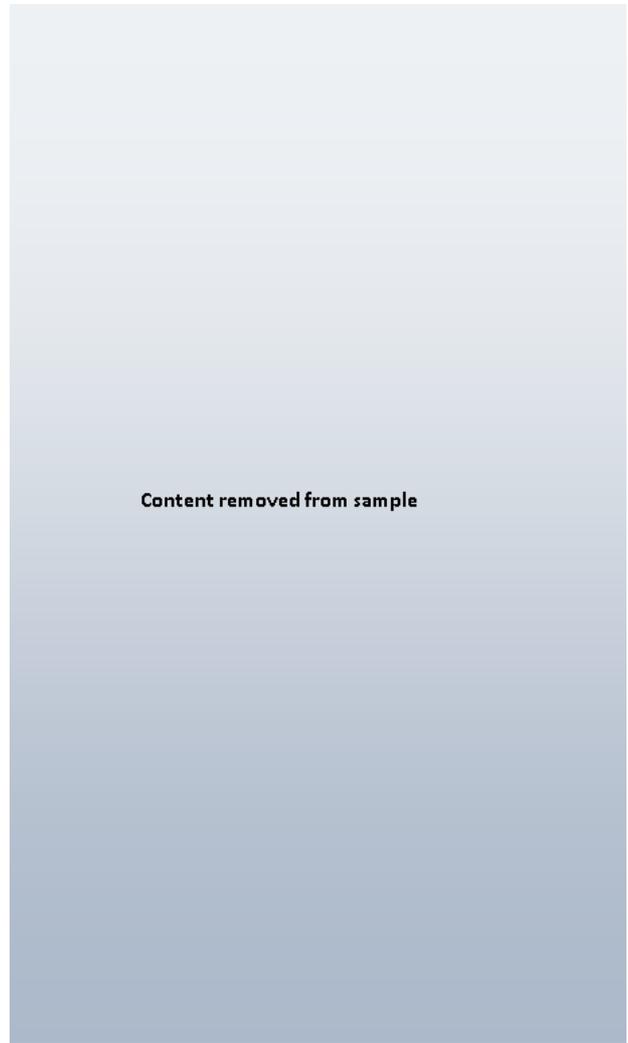


Euromonitor Baseline:

- Positive
- Negative

Pre-C19 Forecasts:

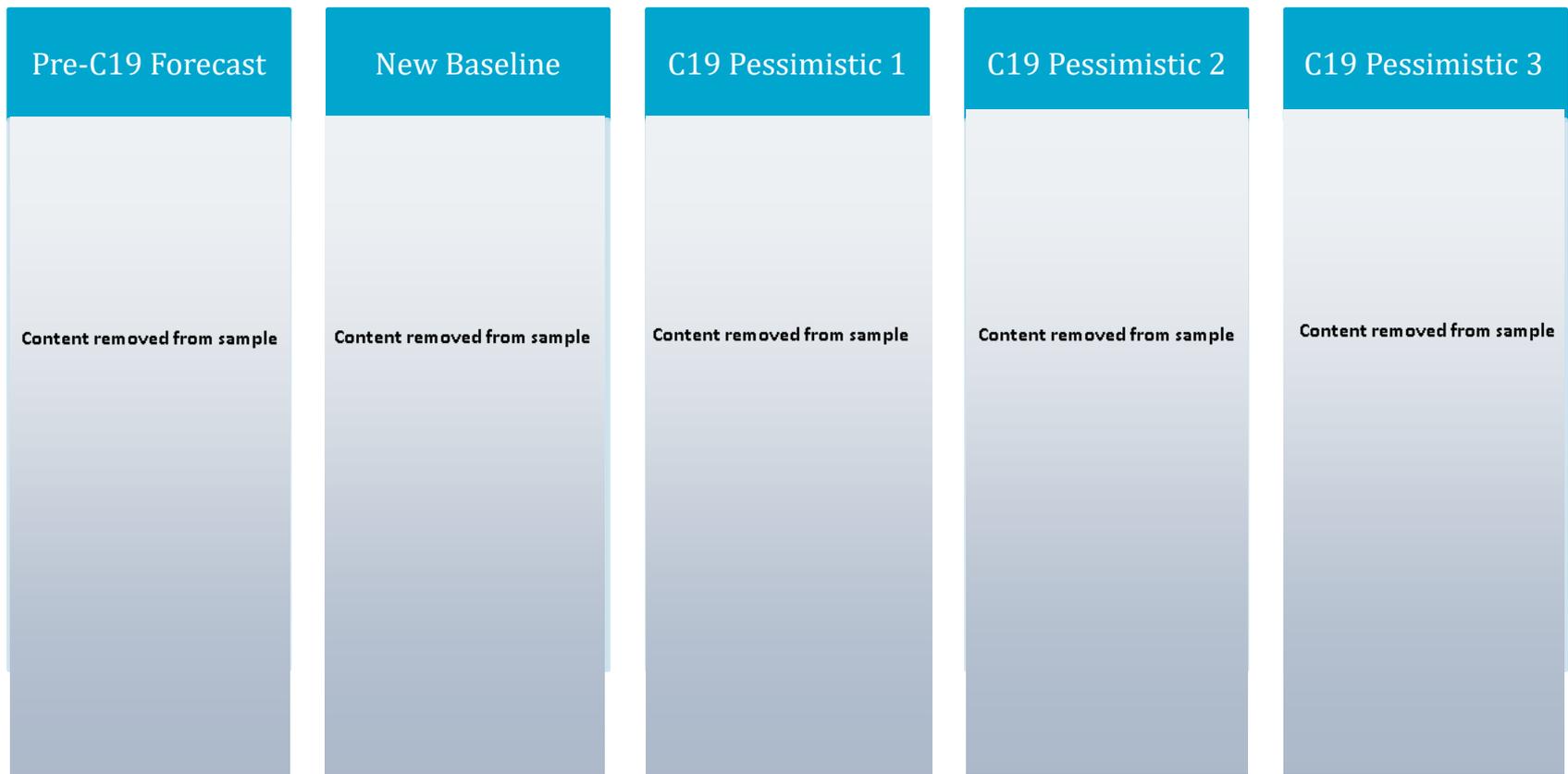
- Positive
- Negative



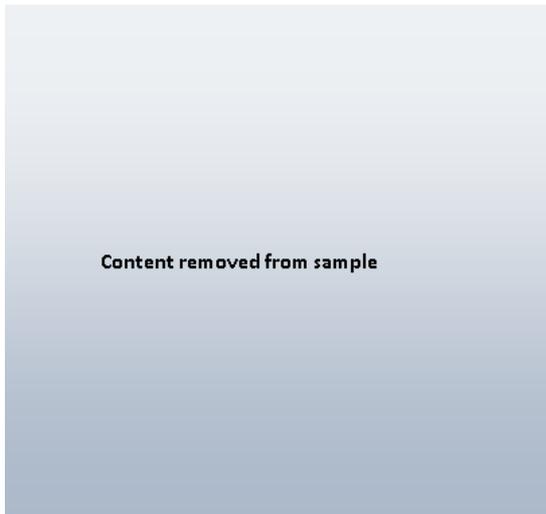
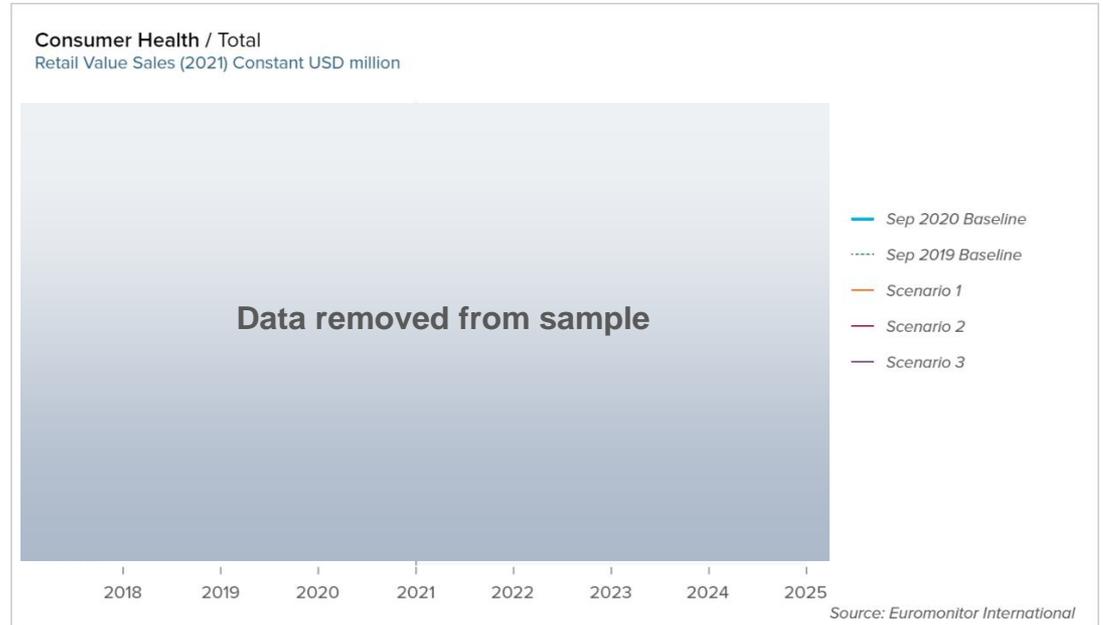
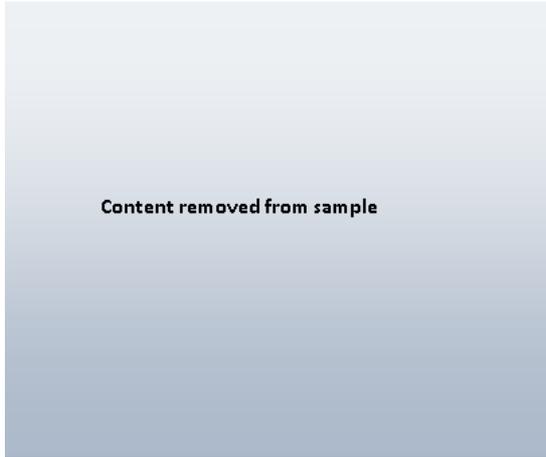
Source: Euromonitor International
Last updated September 15, 2020

Revisiting the forecast for consumer health under future scenarios

- Given the ongoing uncertainty with COVID-19, Euromonitor has built various likely scenarios of future growth. These scenarios have been adjusted and updated frequently since the outset of COVID-19, with the most recent showcased in this briefing from early September 2020.

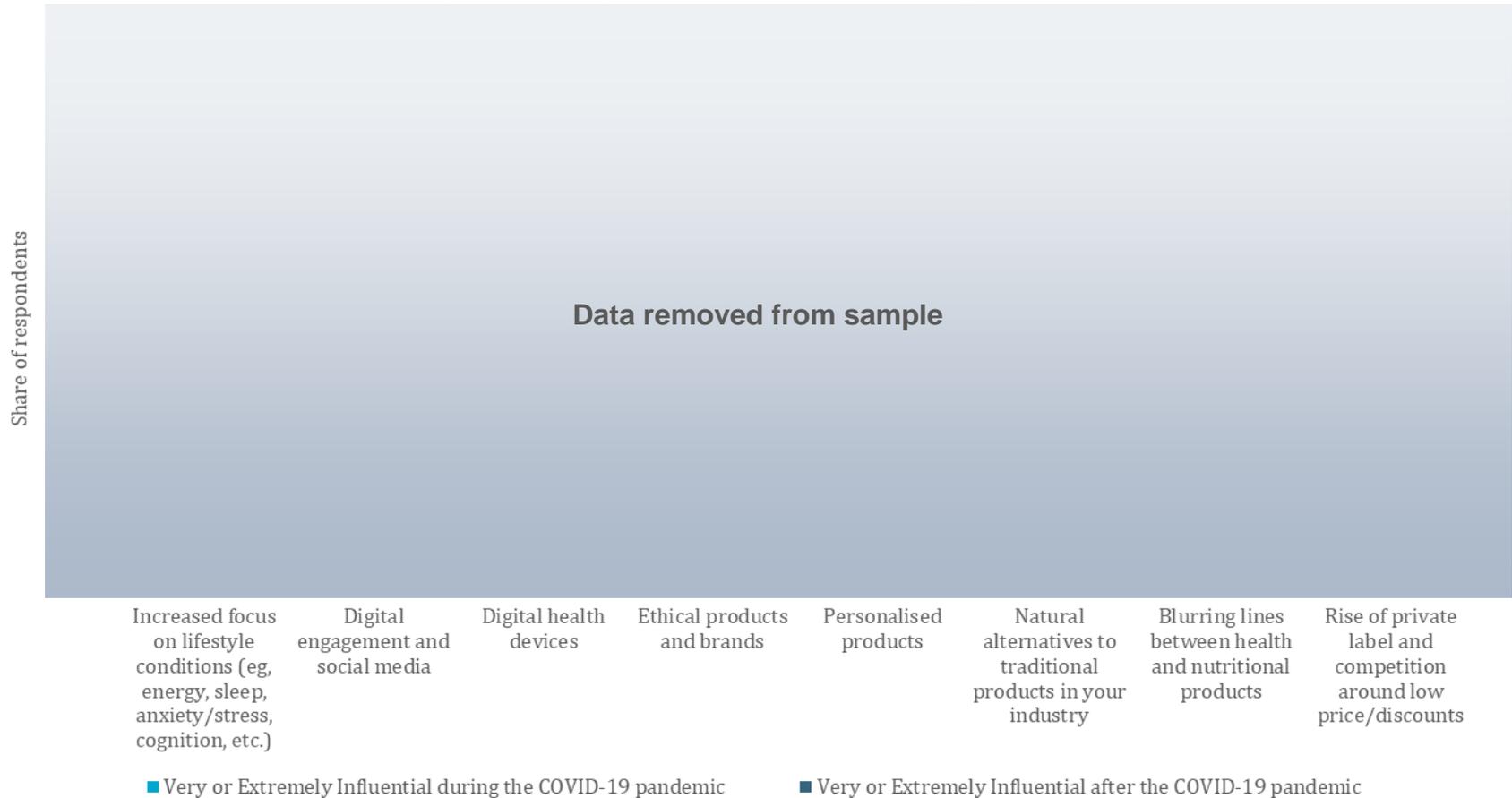


Pessimistic scenarios shackle near-term growth prospects



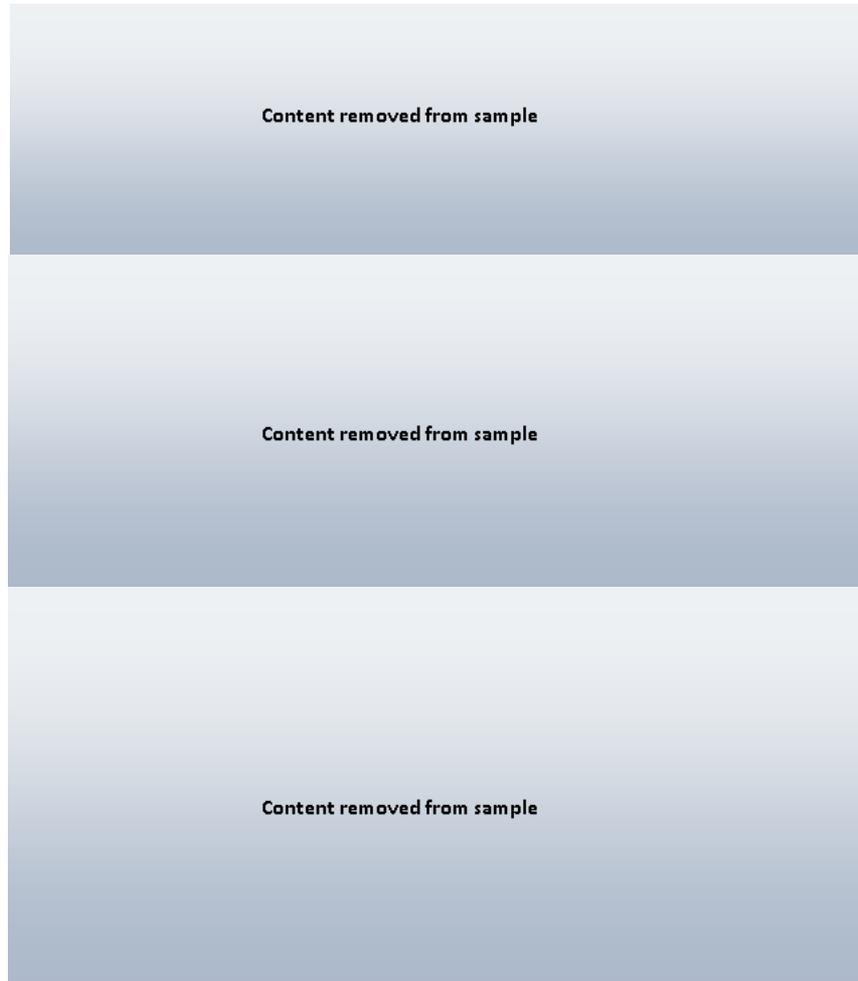
Euromonitor's Industry Insights Survey nods to near-term transformation

Trends Expected to Impact Consumer Health During and After COVID-19



Source: Euromonitor International Voice of the Industry: Consumer Health Survey, May 2020; survey of 449 consumer health experts

How long will the movement to immunity last?



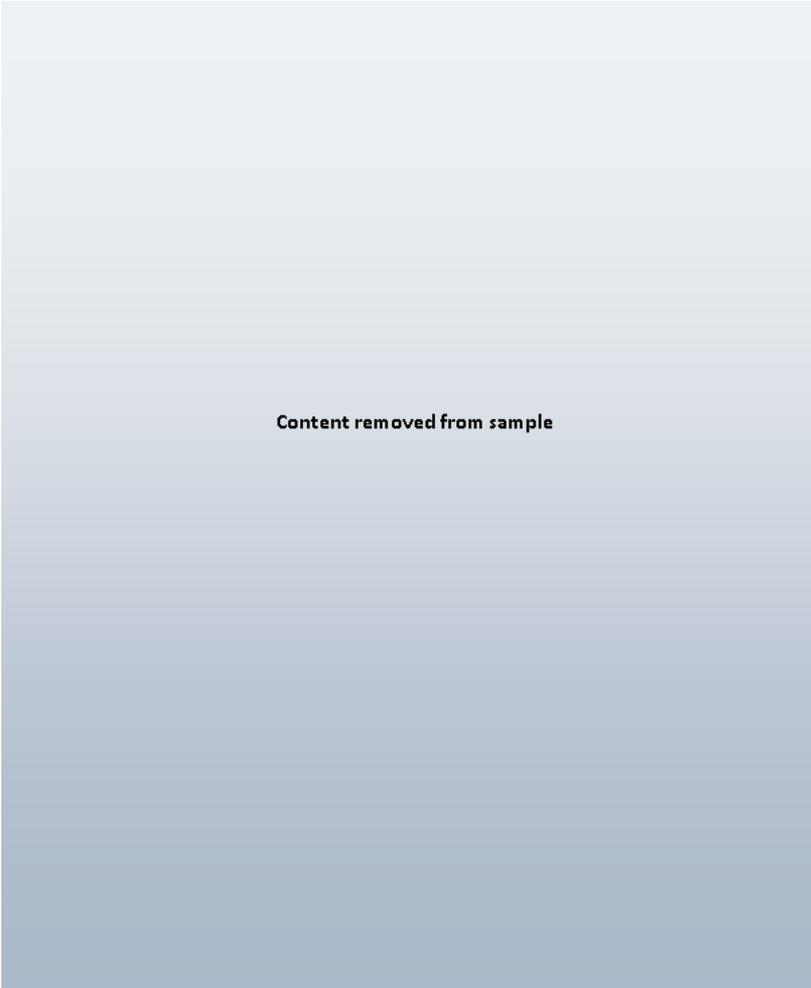
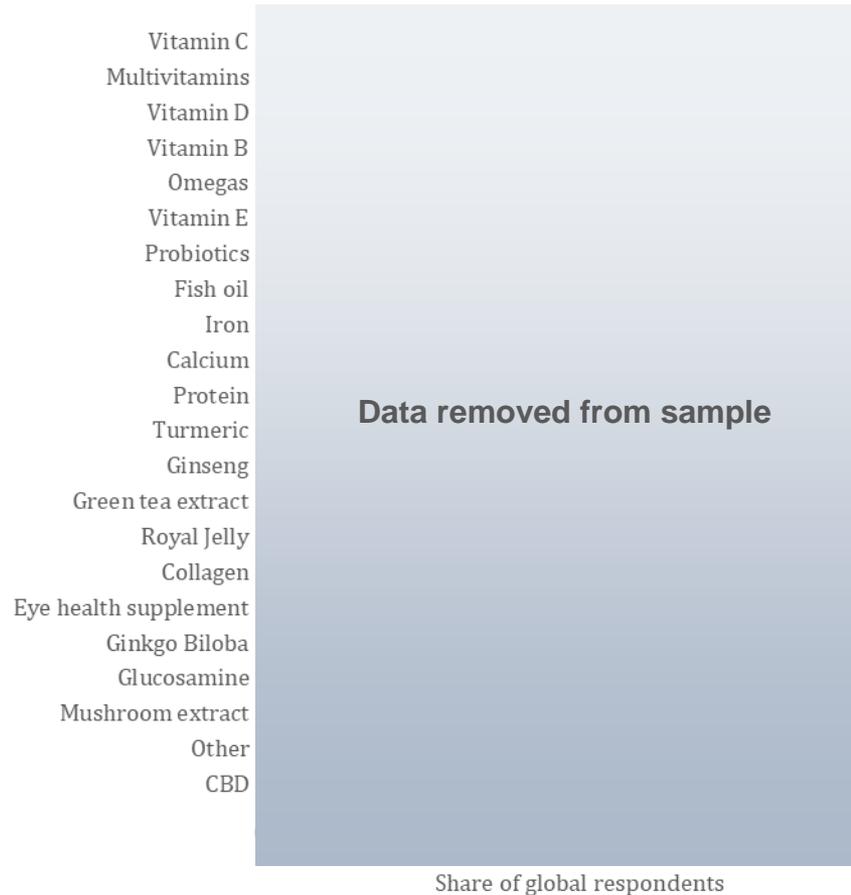
“How do you think consumers will change their shopping and spending behaviour as a result of the COVID-19 pandemic?": Buying more health and wellness-related products



Source: Euromonitor International Voice of the Industry: COVID-19 survey, April and July 2020, n=2,922 (April), n=1,448 (July)

Near-term innovation in immunity likely

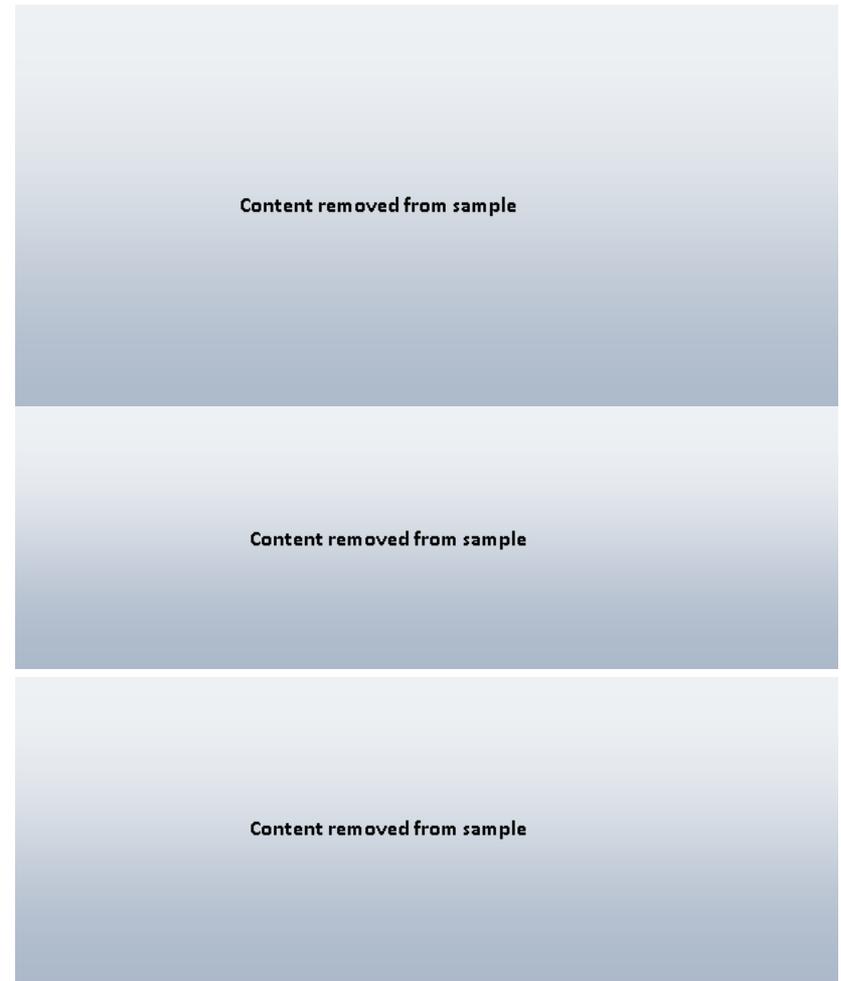
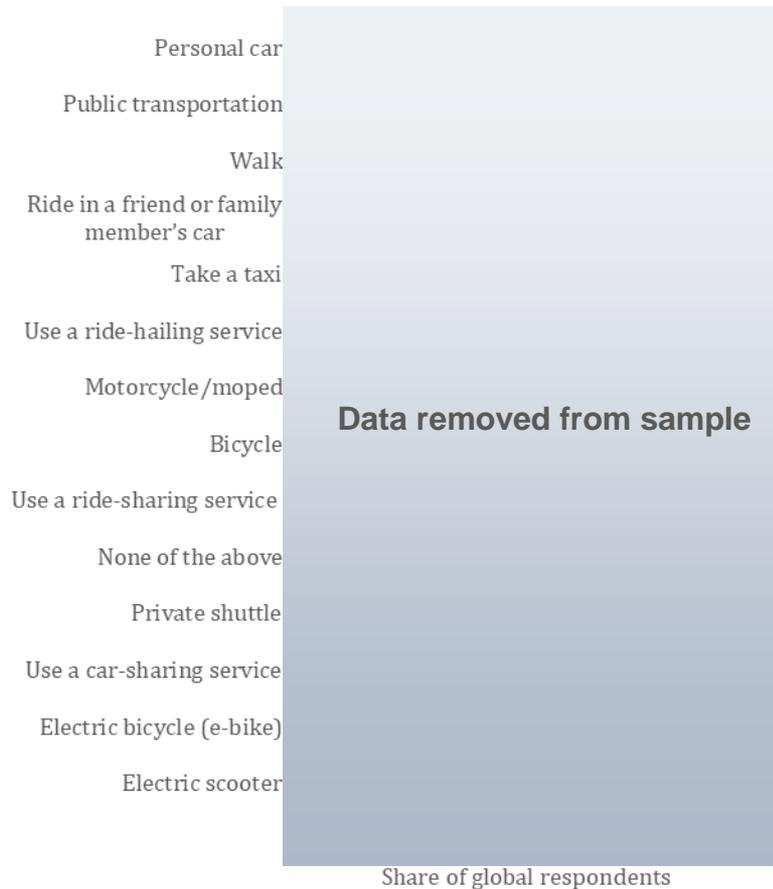
What are Immunity Seekers Taking?



Source: Euromonitor International Health & Nutrition Survey 2020, n=6,918

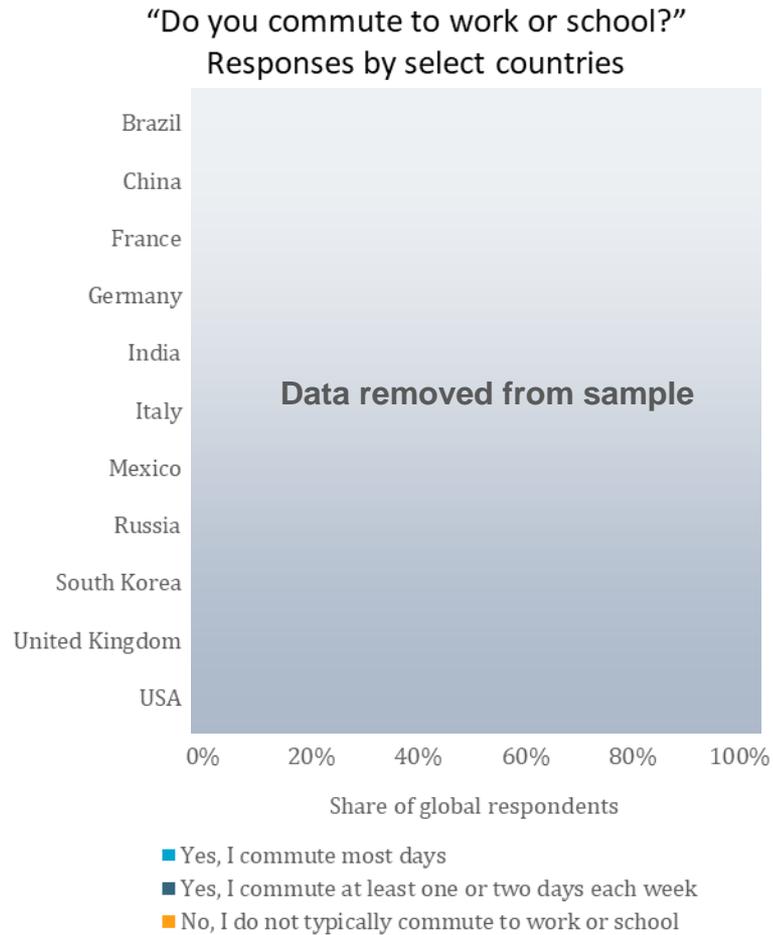
Distancing and limits to movement to constrain sales growth into 2021

Typical Mode of Commute, Global Results

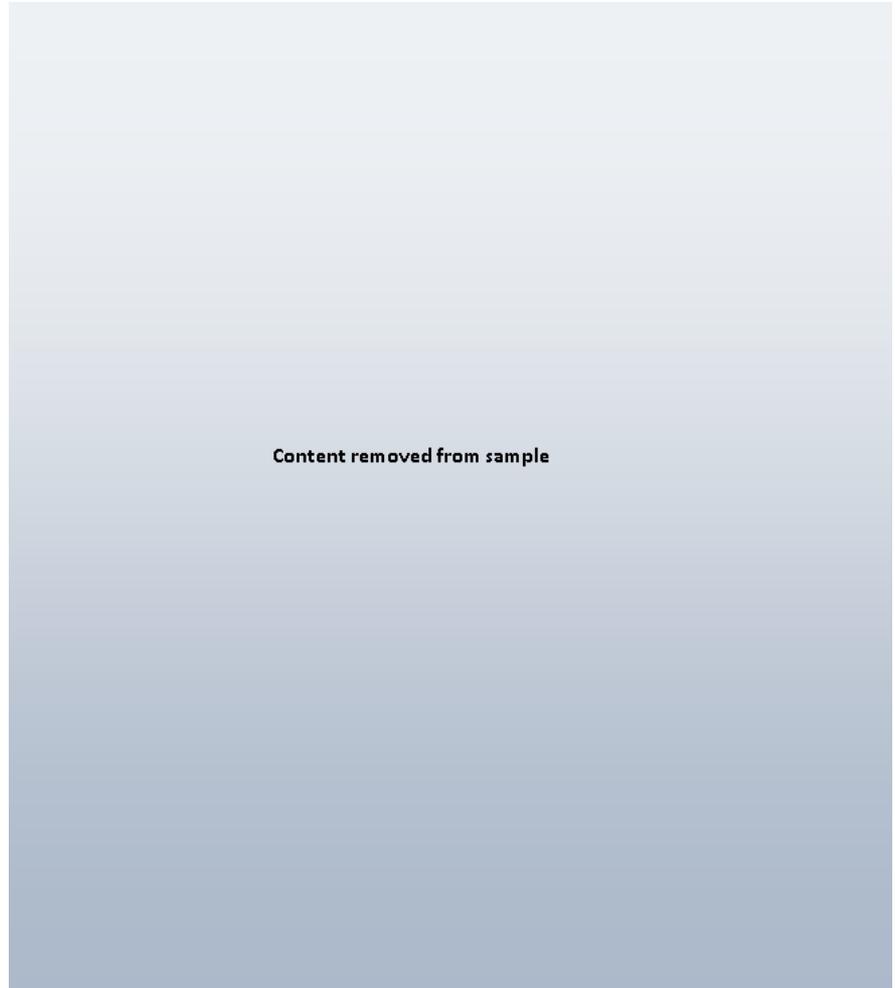


Source: Euromonitor International Mobility Survey 2020, n=30,438

Consumer health rebound tied to trajectory of COVID-19

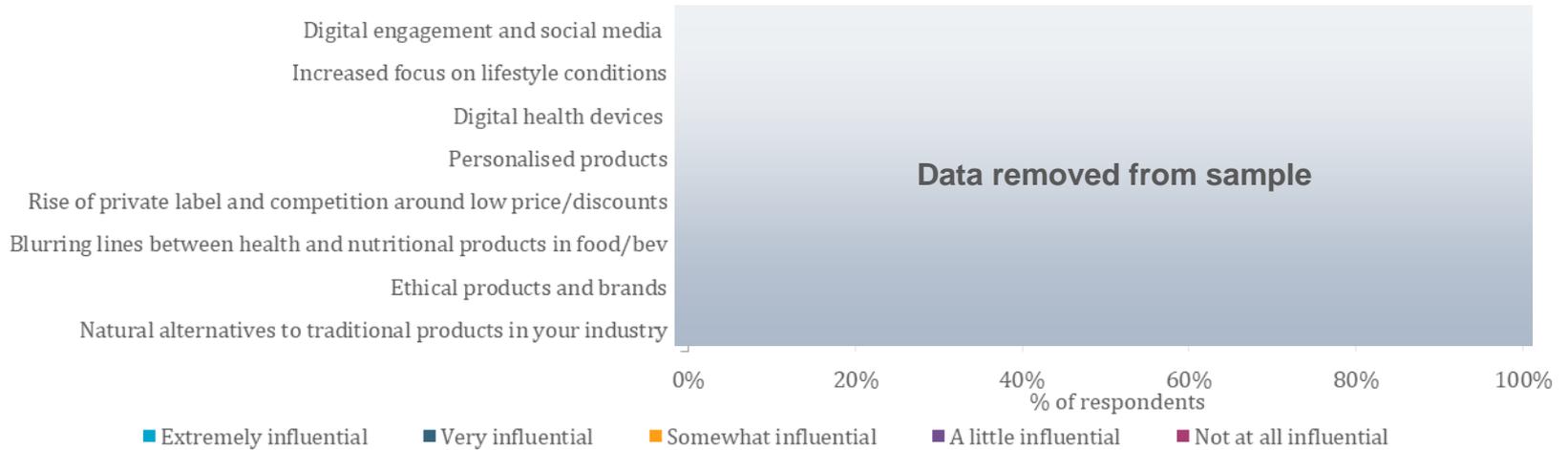


Source: Euromonitor International Mobility Survey 2020, n=30,438



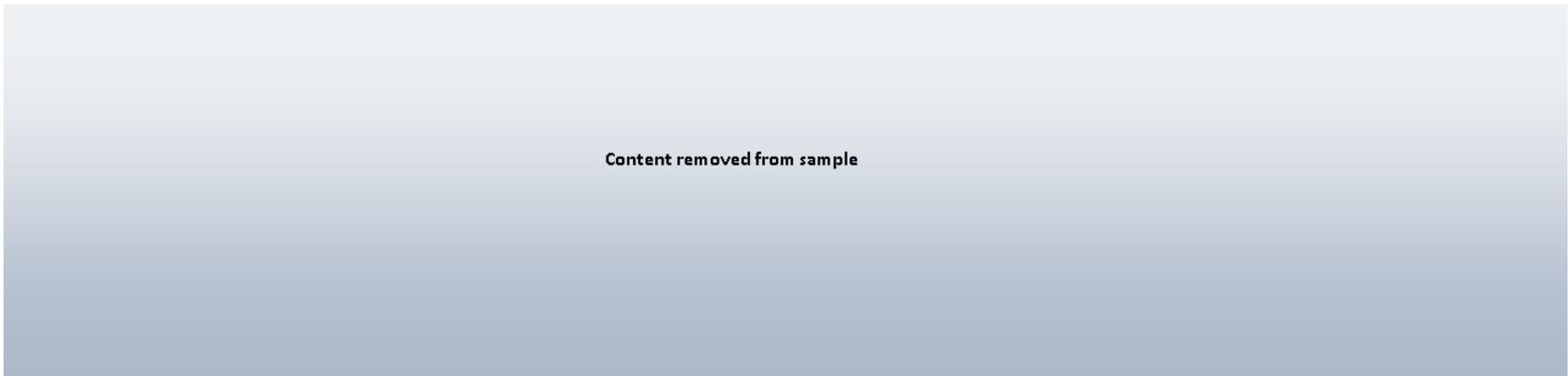
Envisaging the future without COVID-19: Digital health

Trends Expected to Impact Industry After COVID-19

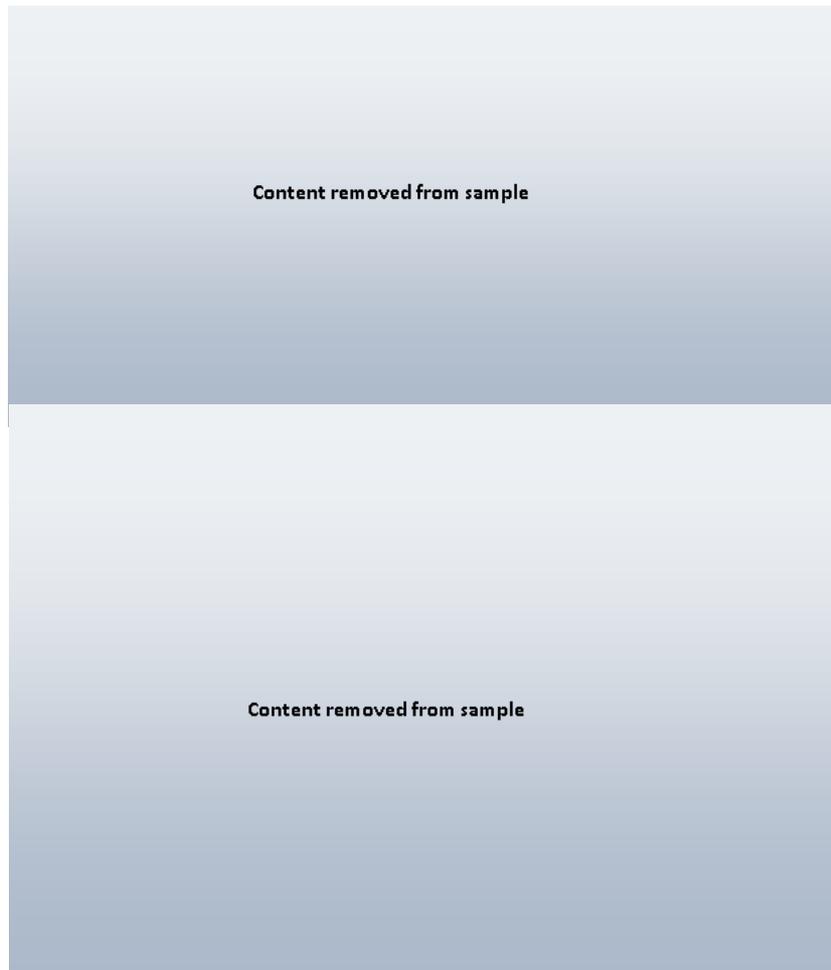


Source: Euromonitor International Voice of the Industry: Consumer Health Survey, 2020

Question: Please rate the level of influence you expect these trends to have after the COVID-19 pandemic.



Envisaging the future without COVID-19: The evolution of e-commerce



Source: Euromonitor International Voice of the Industry: COVID-19 survey, April & July 2020, n=2,922 (April), n=1,448 (July)

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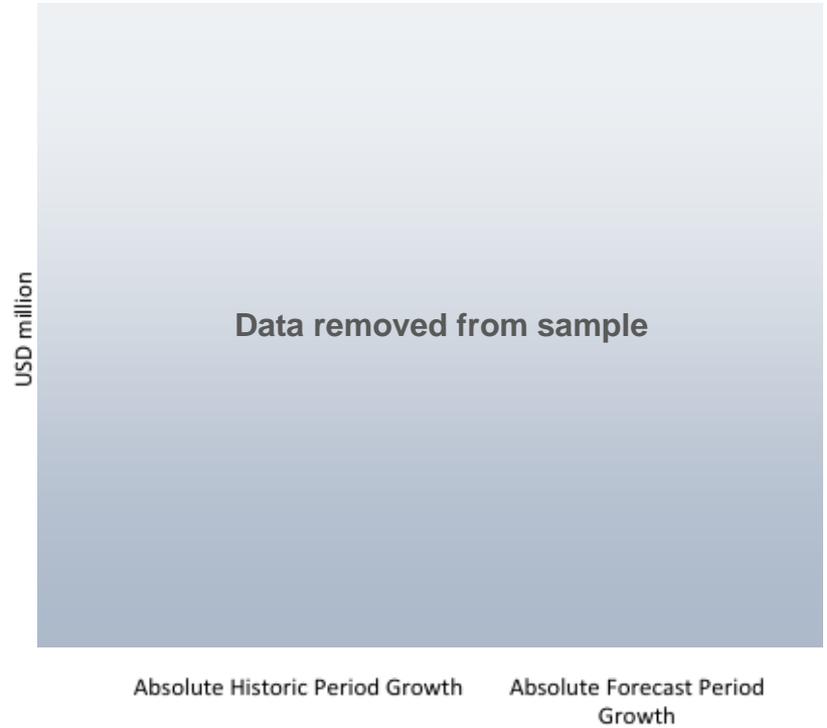


Global snapshot of OTC

OTC: Evolution of Global Market 2015-2025
Retail Value RSP USD million



OTC: Absolute Growth by Region
Retail Value RSP USD million



- Asia Pacific
- Australasia
- Eastern Europe
- Latin America
- Middle East and Africa
- North America
- Western Europe
- OTC

Global snapshot of vitamins and dietary supplements

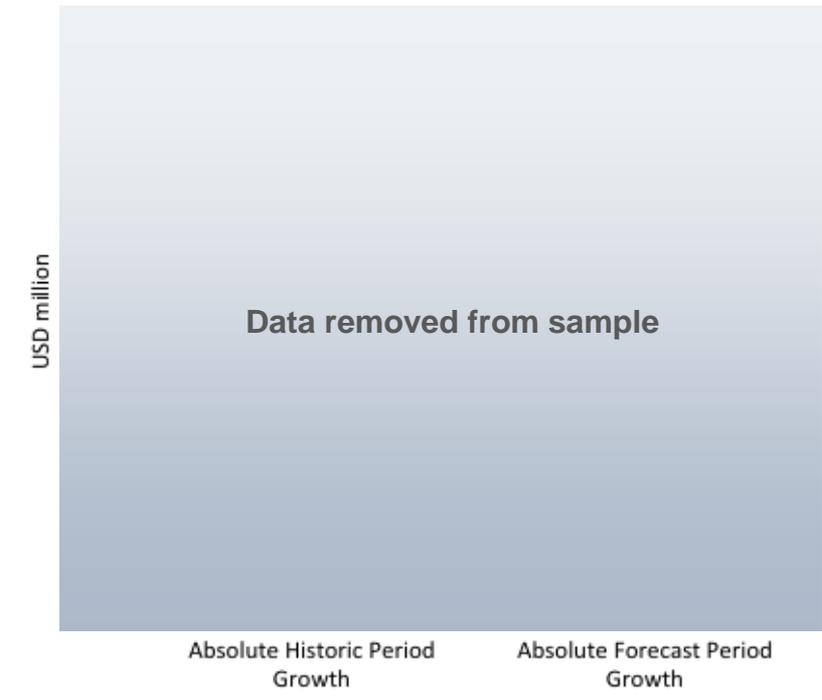
Vitamins and Dietary Supplements: Evolution of Global Market 2015-2025

Retail Value RSP USD million



Vitamins and Dietary Supplements: Absolute Growth by Region

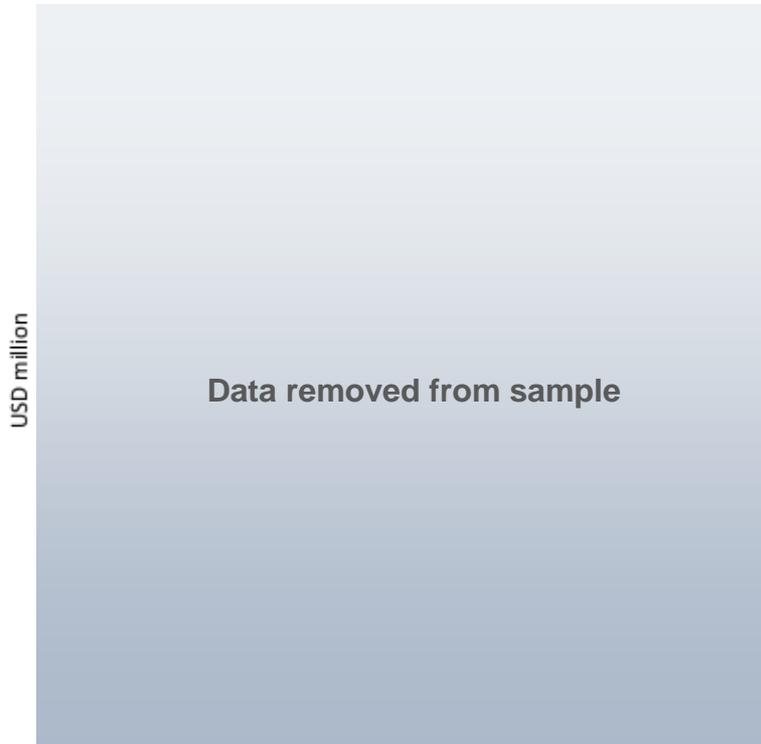
Retail Value RSP USD million



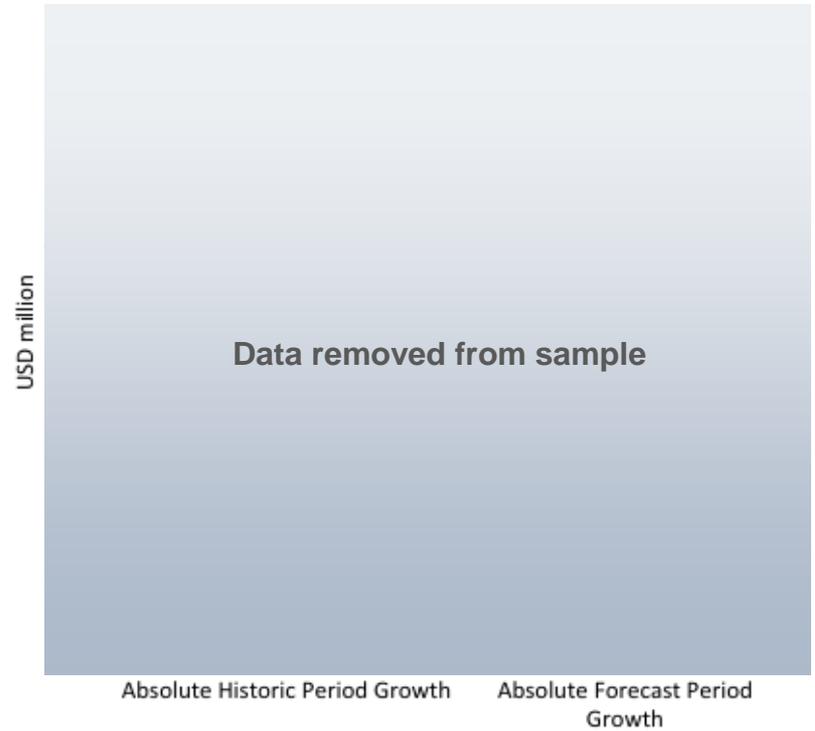
- Asia Pacific
 - Australasia
 - Eastern Europe
 - Latin America
 - Middle East and Africa
 - North America
 - Western Europe
- Vitamins and Dietary Supplements

Global snapshot of sports nutrition

Sports Nutrition: Evolution of Global Market 2015-2025
Retail Value RSP USD million



Sports Nutrition: Absolute Growth by Region
Retail Value RSP USD million



- Asia Pacific
- Australasia
- Eastern Europe
- Latin America
- Middle East and Africa
- North America
- Western Europe
- Sports Nutrition

Global snapshot of weight management and wellbeing

Weight Management and Wellbeing: Evolution of Global Market 2015-2025

Retail Value RSP USD million



Weight Management and Wellbeing: Absolute Growth by Region

Retail Value RSP USD million

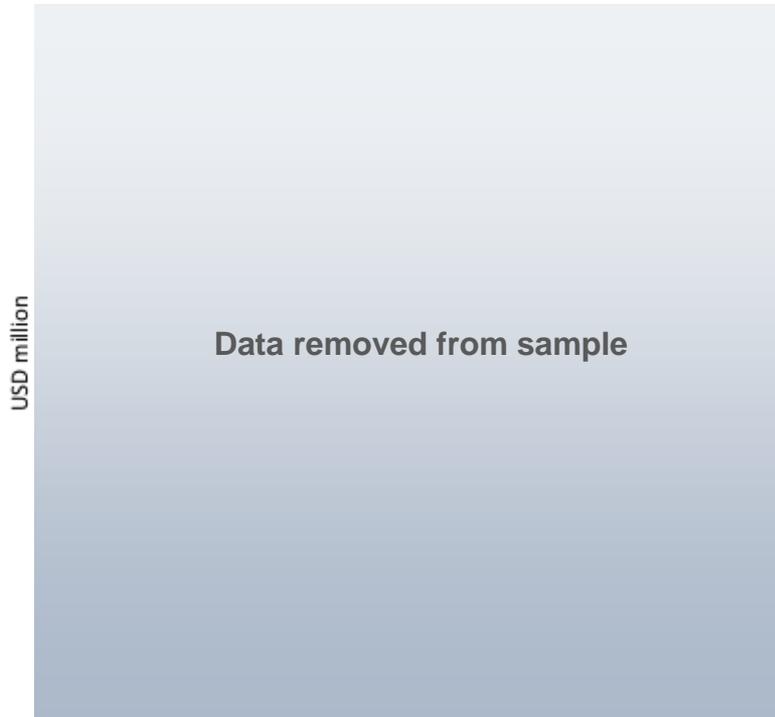


- Asia Pacific
- Australasia
- Eastern Europe
- Latin America
- Middle East and Africa
- North America
- Western Europe

Weight Management and Wellbeing

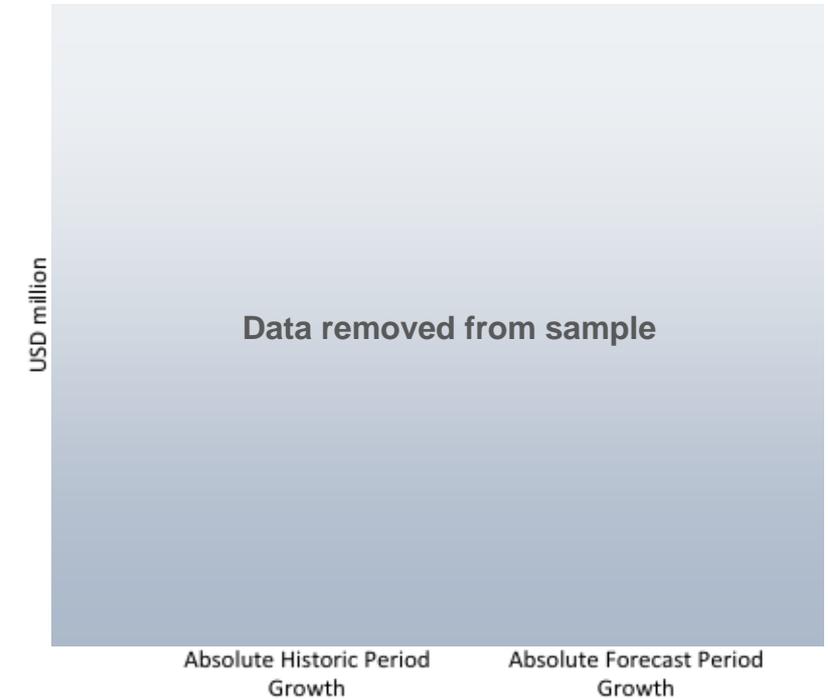
Regional snapshot: Asia Pacific

Asia Pacific: Evolution of Consumer Health 2015-2025
Retail Value RSP USD million



- Vitamins and Dietary Supple..
- OTC
- Weight Management and W..
- Sports Nutrition

Asia Pacific: Absolute Growth by Category
Retail Value RSP USD million



Asia Pacific

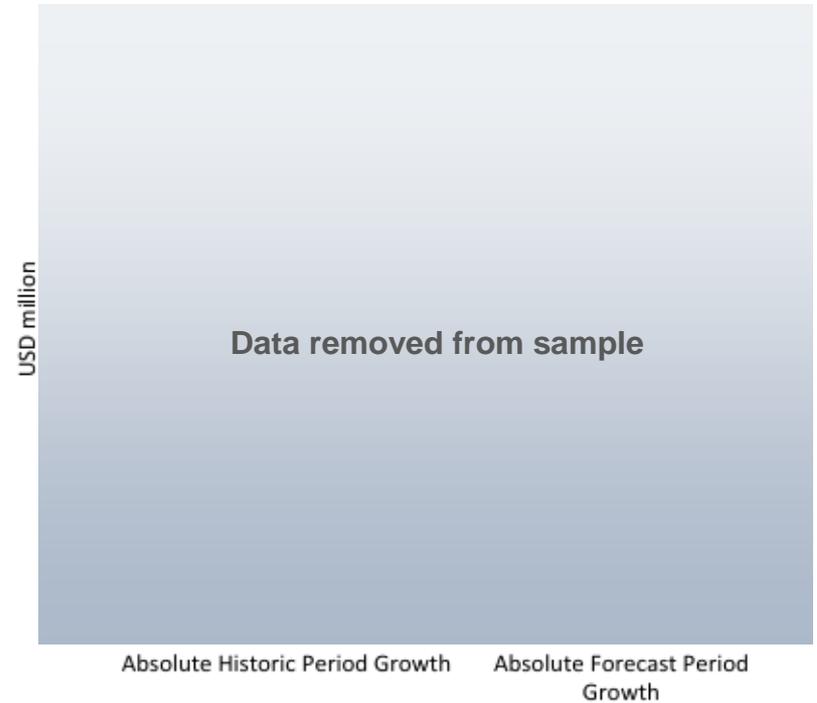
Regional snapshot: North America

North America: Evolution of Consumer Health 2015-2025
Retail Value RSP USD million



- Vitamins and Dietary Supple..
- Weight Management and W..
- OTC
- Sports Nutrition

North America: Absolute Growth by Category
Retail Value RSP USD million



North America

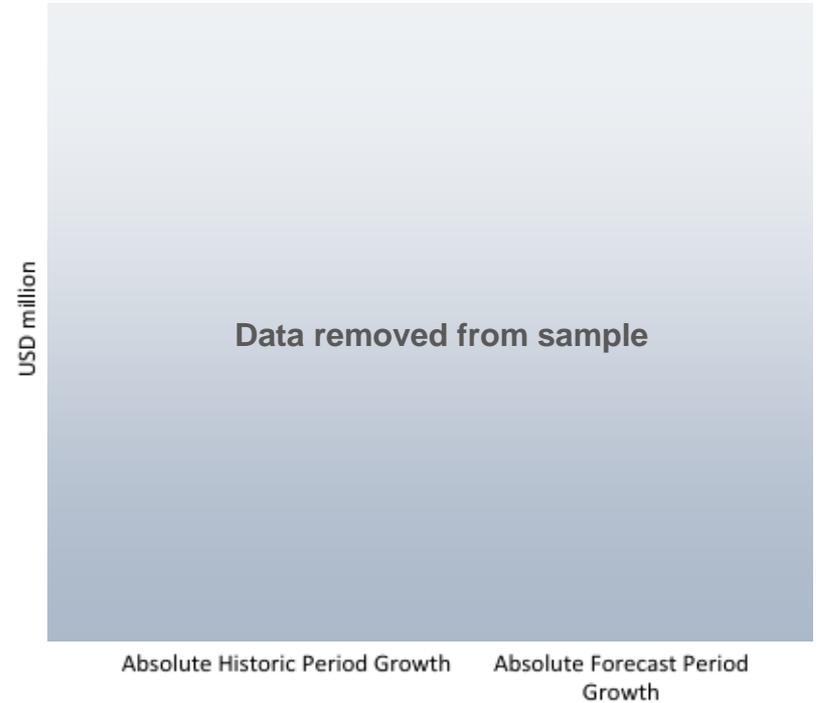
Regional snapshot: Latin America

Latin America: Evolution of Consumer Health 2015-2025
Retail Value RSP USD million



- OTC
- Sports Nutrition
- Vitamins and Dietary Supple..
- Weight Management and W..

Latin America: Absolute Growth by Category
Retail Value RSP USD million



Latin America

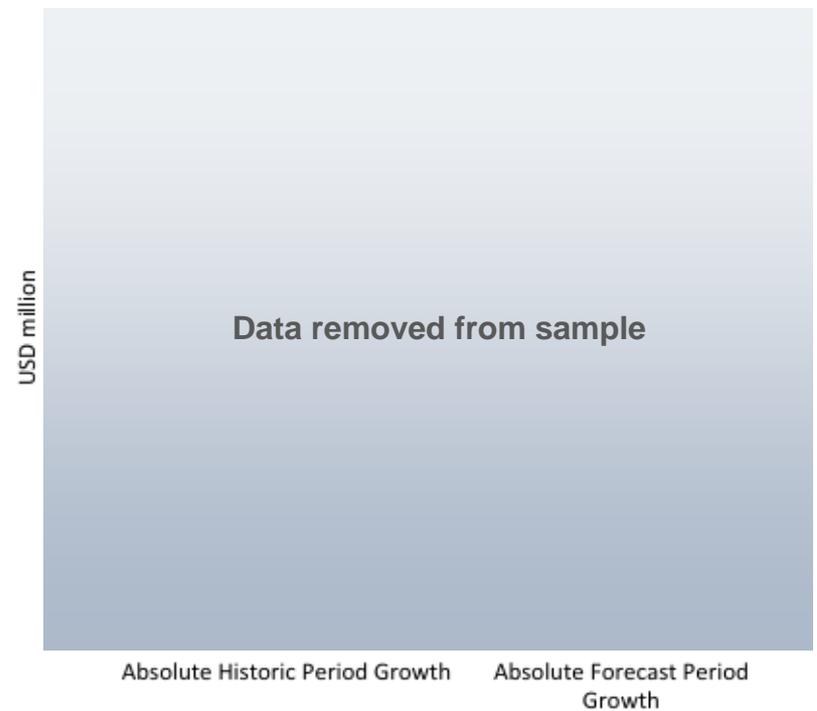
Regional snapshot: Western Europe

Western Europe: Evolution of Consumer Health 2015-2025
Retail Value RSP USD million



- OTC
- Weight Management and W..
- Vitamins and Dietary Supple..
- Sports Nutrition

Western Europe: Absolute Growth by Category
Retail Value RSP USD million



Western Europe

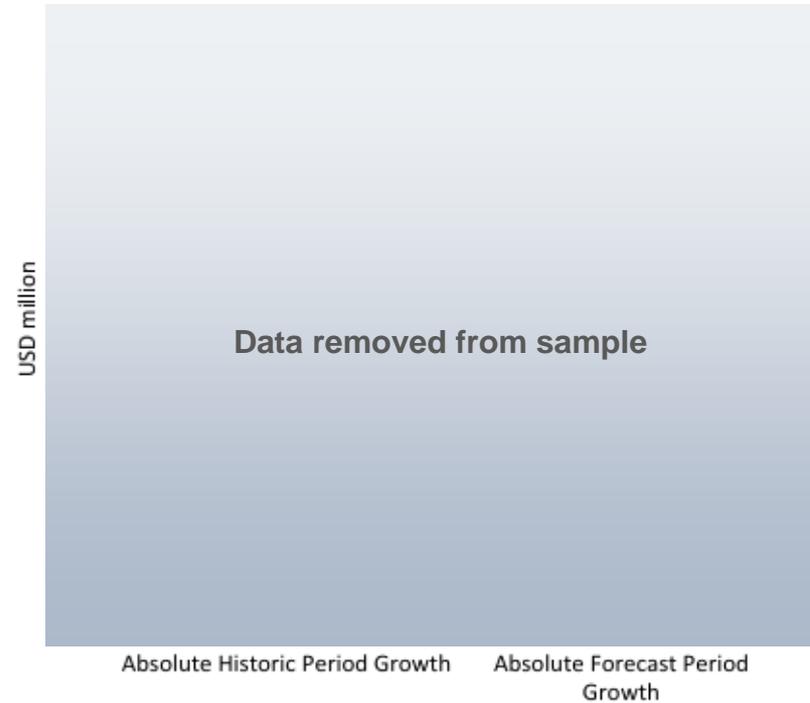
Regional snapshot: Eastern Europe

Eastern Europe: Evolution of Consumer Health 2015-2025
Retail Value RSP USD million



- OTC
- Sports Nutrition
- Vitamins and Dietary Supple..
- Weight Management and W..

Eastern Europe: Absolute Growth by Category
Retail Value RSP USD million



Eastern Europe

Regional snapshot: Middle East and Africa

Middle East and Africa: Evolution of Consumer Health
2015-2025

Retail Value RSP USD million



- OTC
- Sports Nutrition
- Vitamins and Dietary Supple..
- Weight Management and W..

Middle East and Africa: Absolute Growth by Category

Retail Value RSP USD million



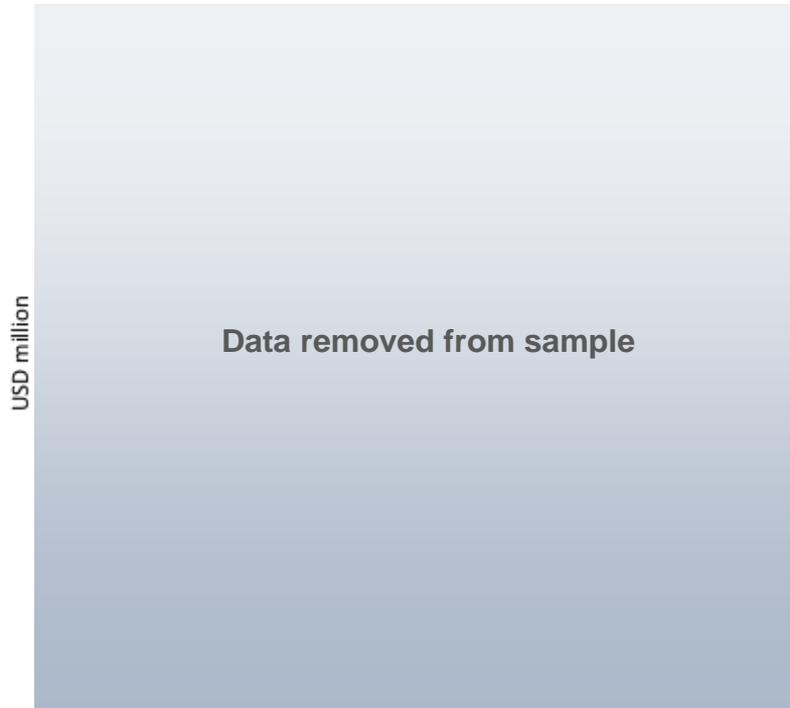
Absolute Historic Period Growth

Absolute Forecast Period Growth

Middle East and Africa

Regional snapshot: Australasia

Australasia: Evolution of Consumer Health 2015-2025
Retail Value RSP USD million



- Vitamins and Dietary Supple..
- Weight Management and W..
- OTC
- Sports Nutrition

Australasia: Absolute Growth by Category
Retail Value RSP USD million



Australasia

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