



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

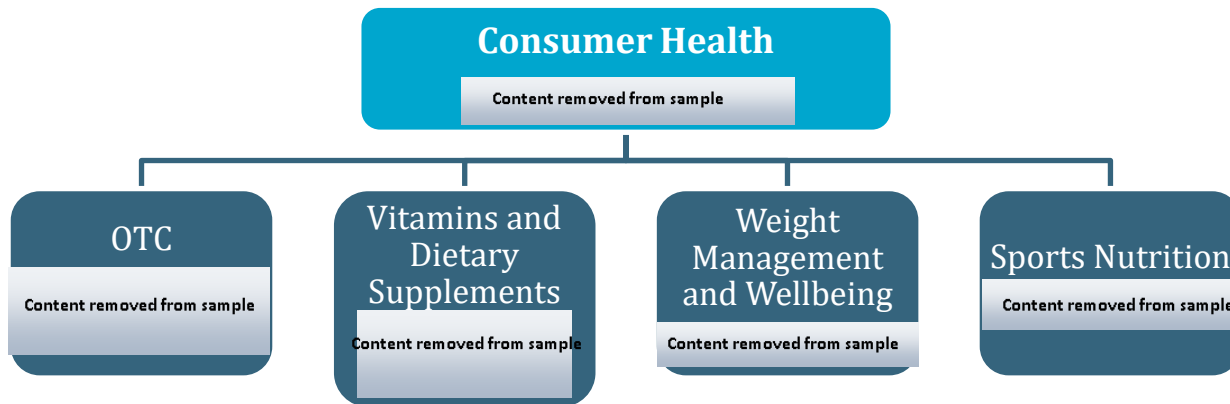


Scope

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

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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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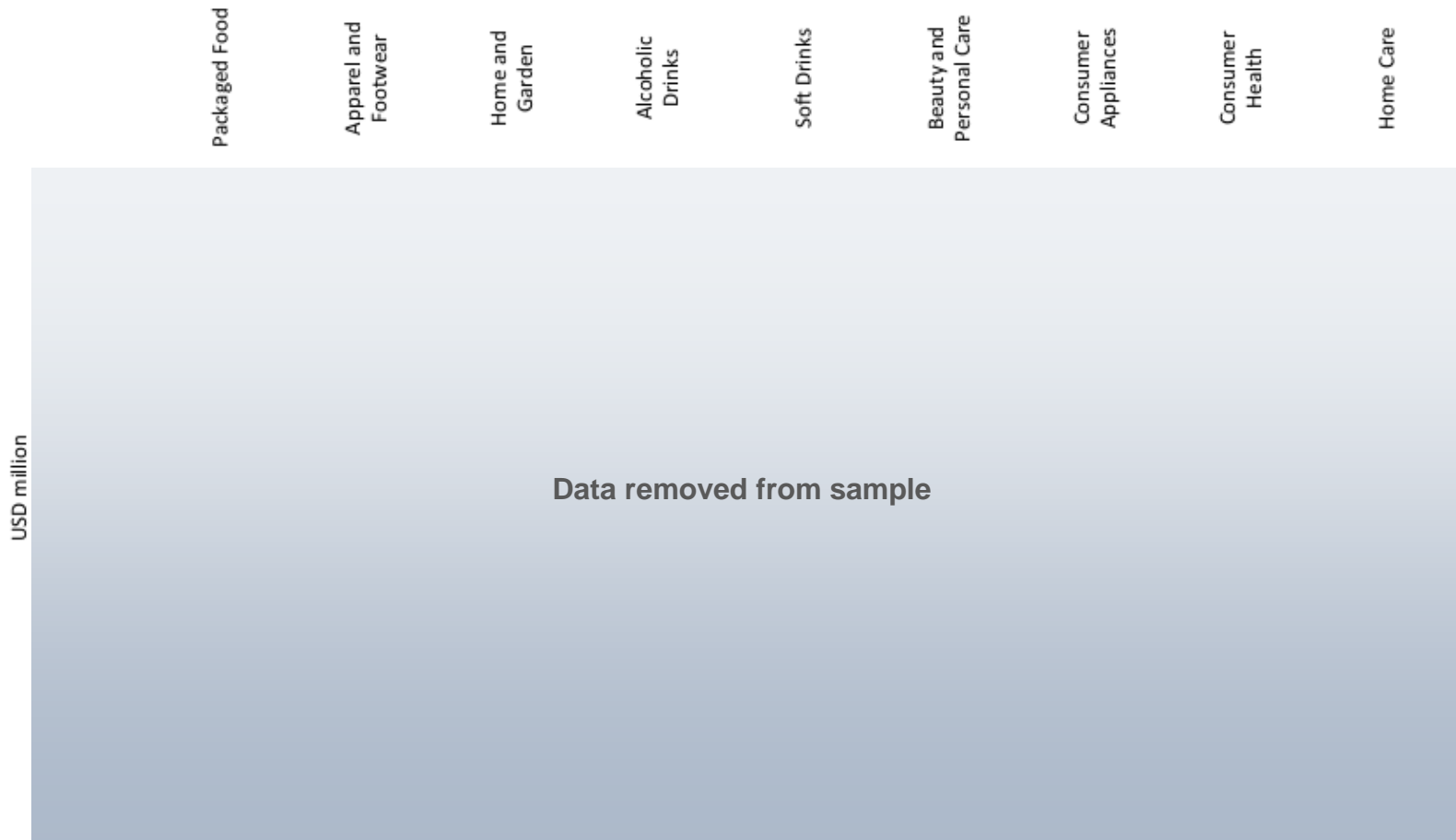
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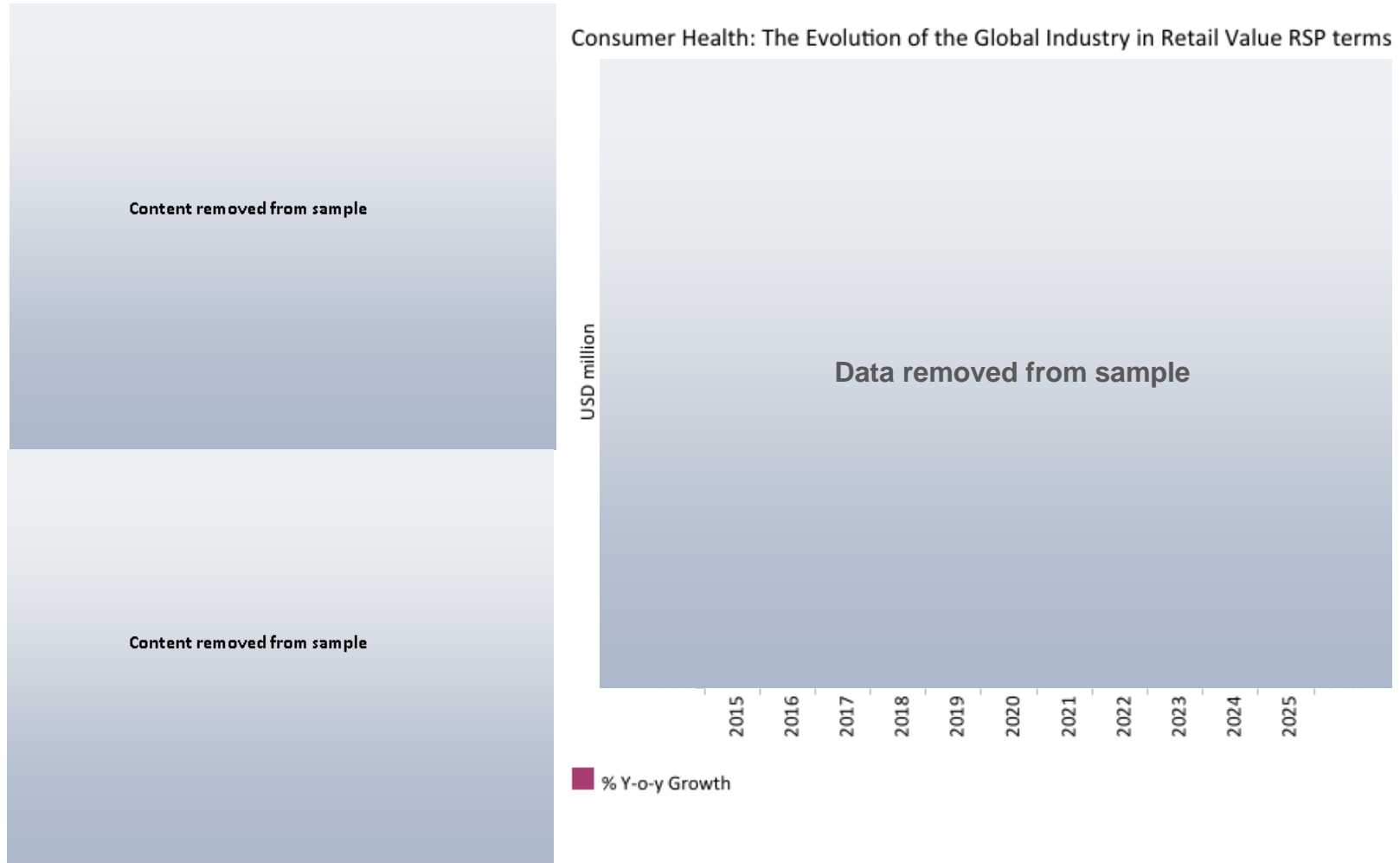


Consumer health in context

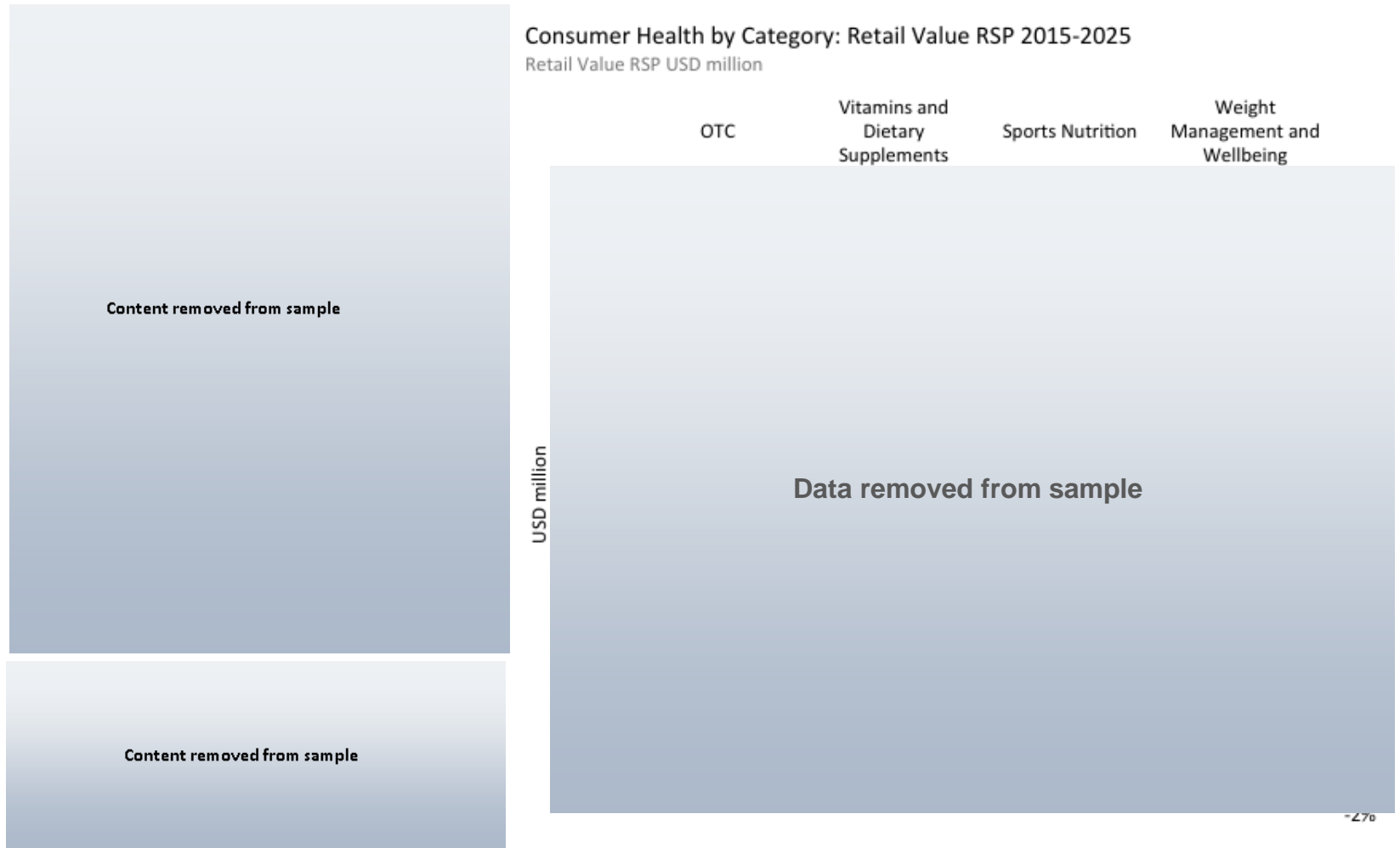
World: Consumer Goods by Industry Size and Growth 2015-2020



Global consumer health sees slight softening of growth in 2020

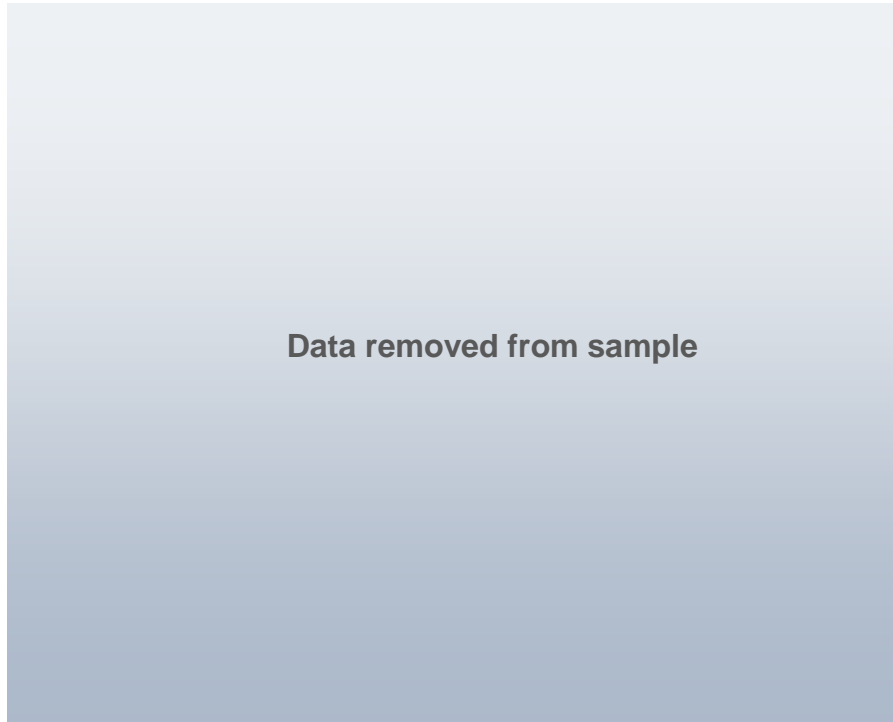


Effects of COVID-19 are starkly different among categories



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

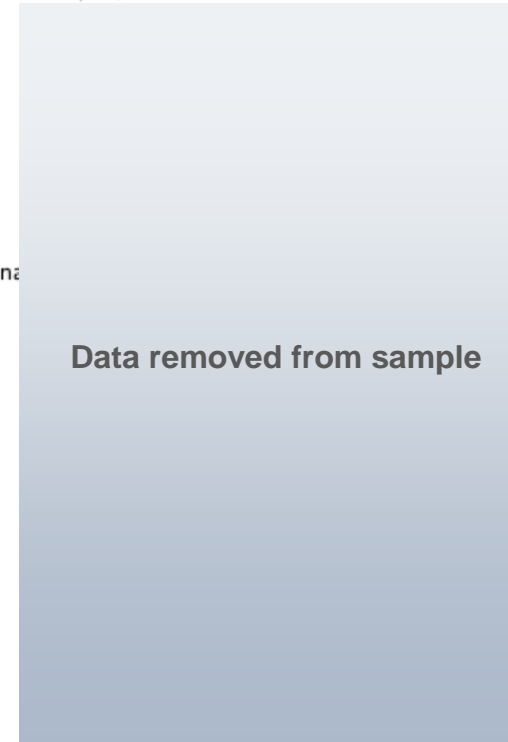


- OTC
- Vitamins and Dietary Supplements
- Weight Management and Wellbeing

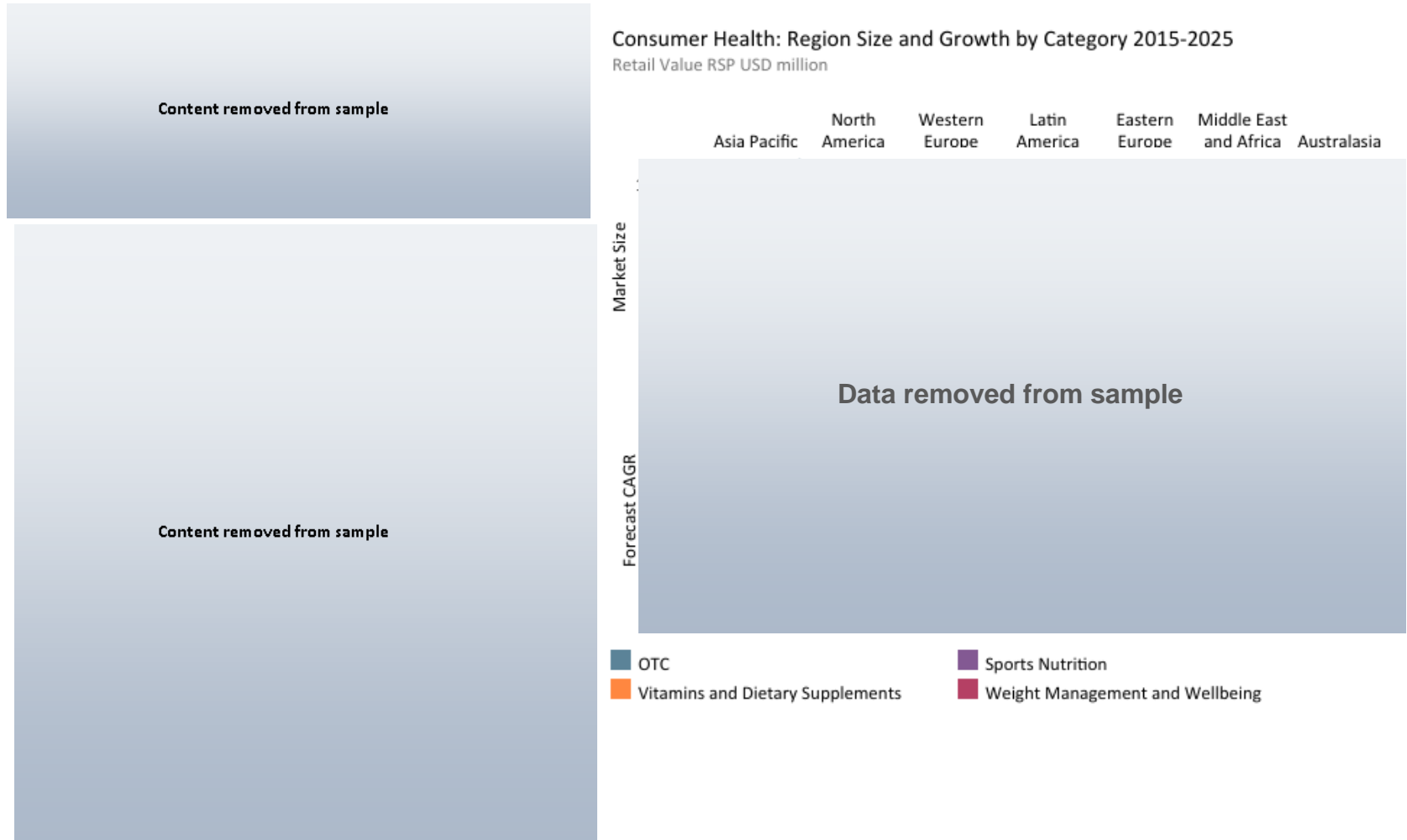
Sports Nutrition

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

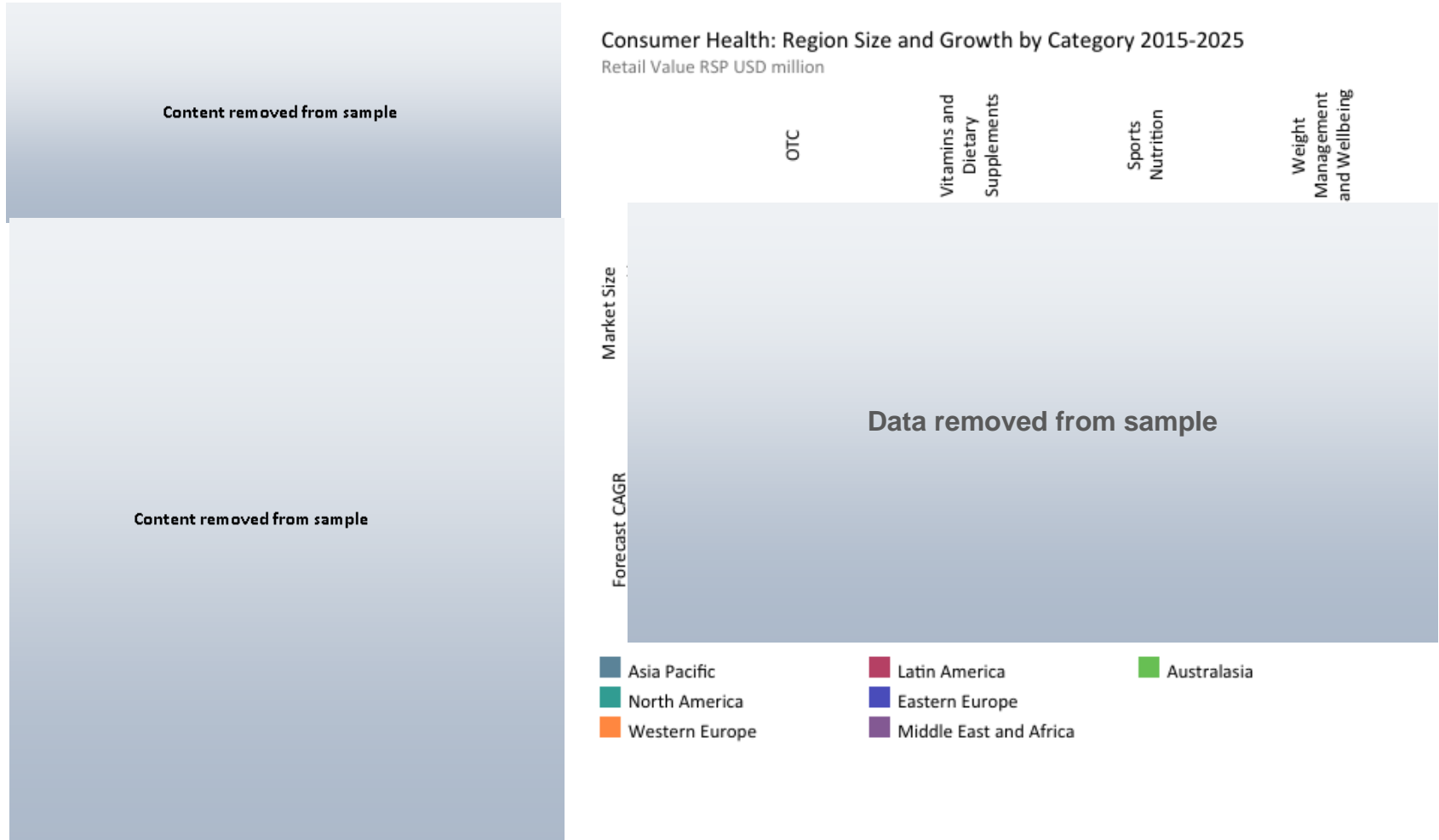
- US
- Australia
- Finland
- Norway
- Japan
- Taiwan
- Switzerland
- Hong Kong, China
- Sweden
- Singapore
- Canada
- Italy
- South Korea
- Belgium
- Denmark
- Austria
- UK
- Germany
- New Zealand
- Ireland



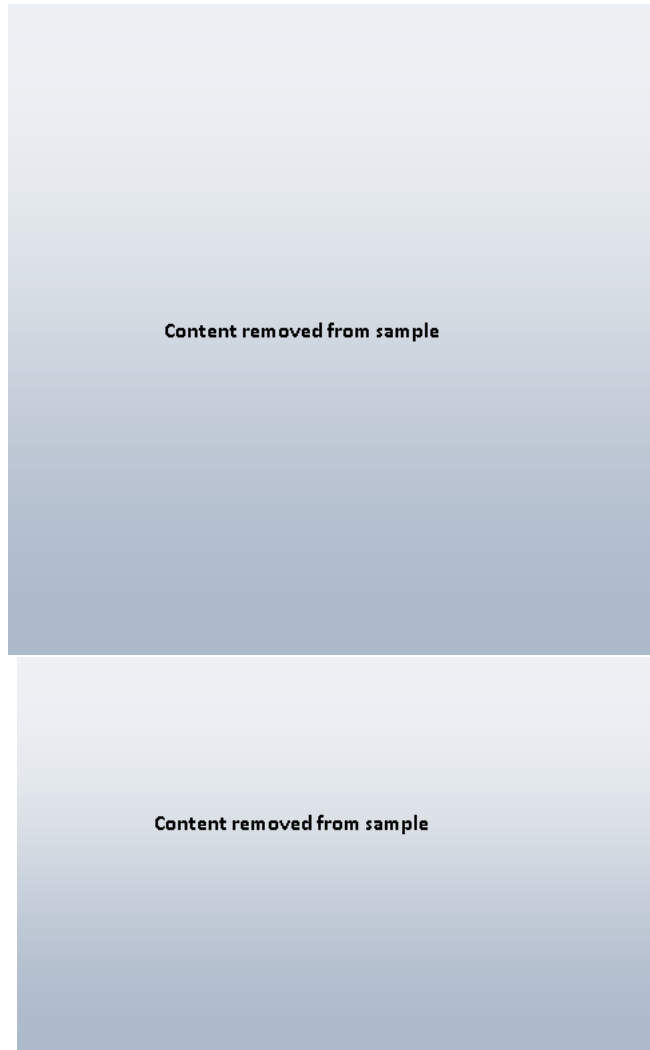
Asia Pacific's sales blip in 2020 unlikely to continue over the forecast



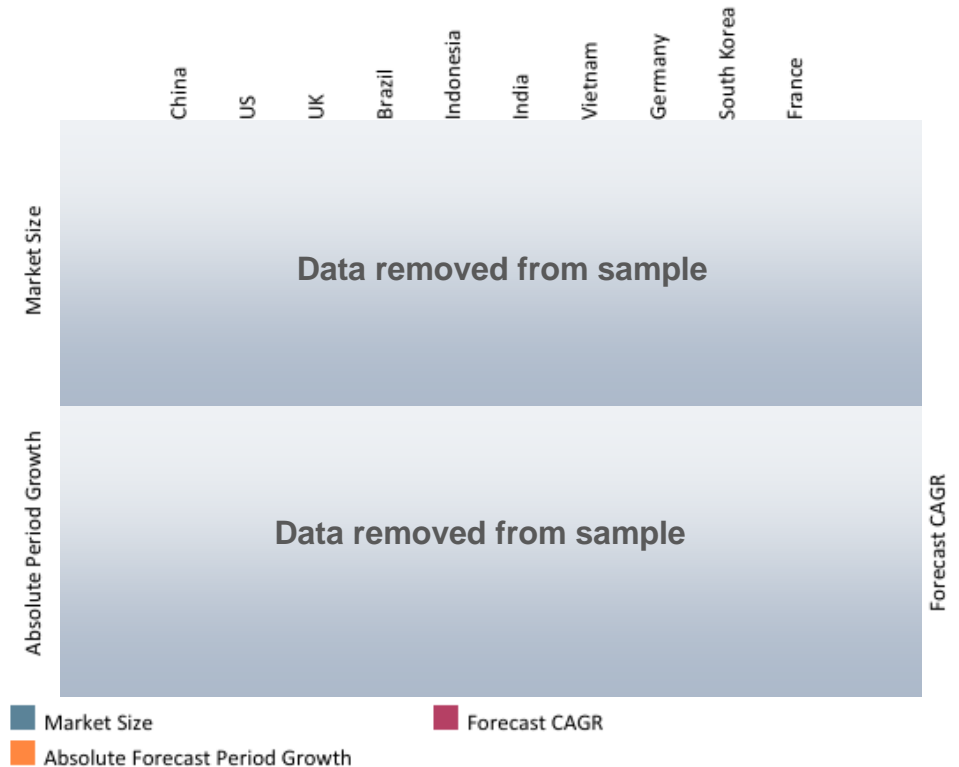
Parity of VDS and OTC tells different stories of the future of the industry



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



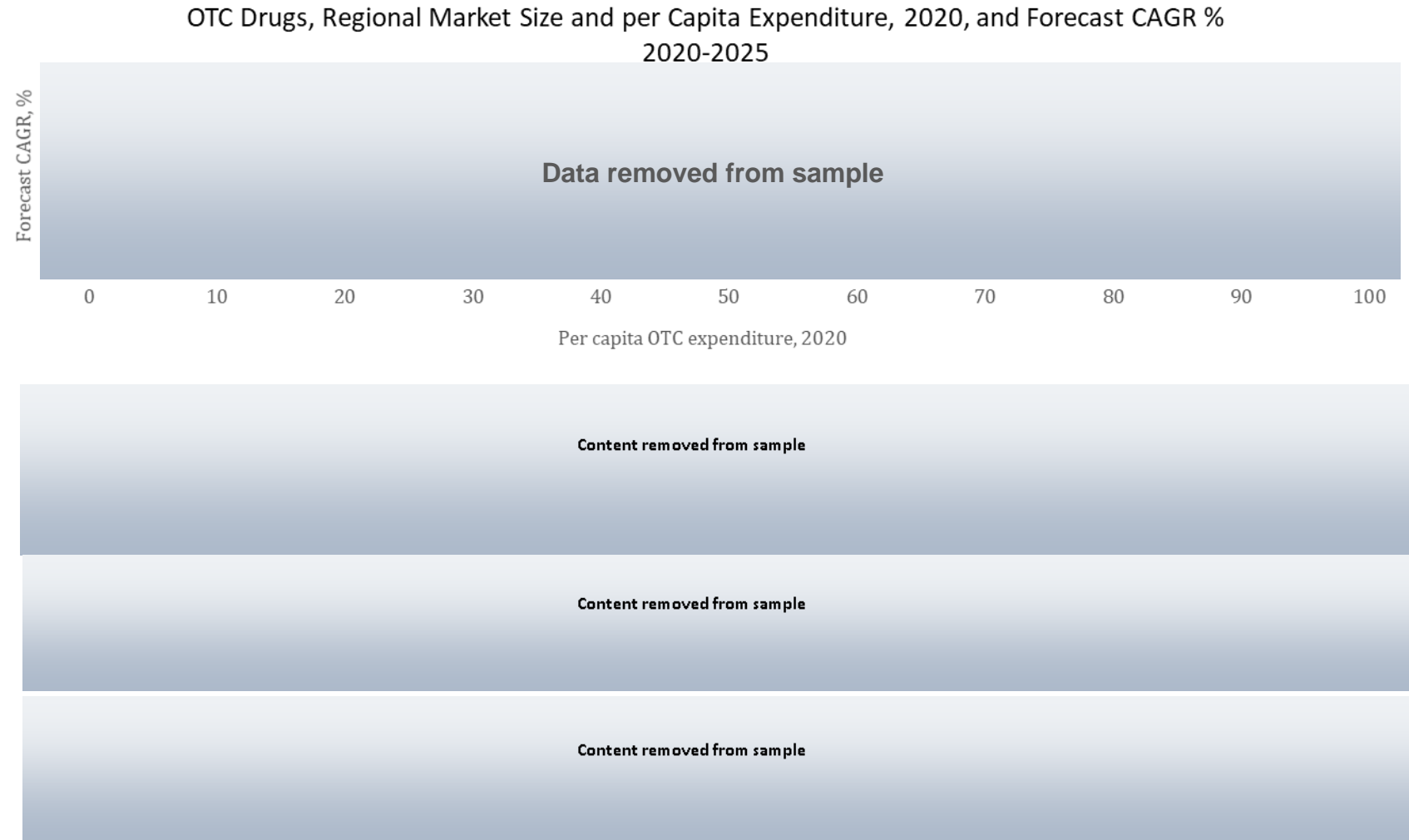
Consumer Health: Top 10 Markets by Forecast Absolute Growth 2020-2025
Retail Value RSP USD million



How to evaluate the global outlook for OTC drugs

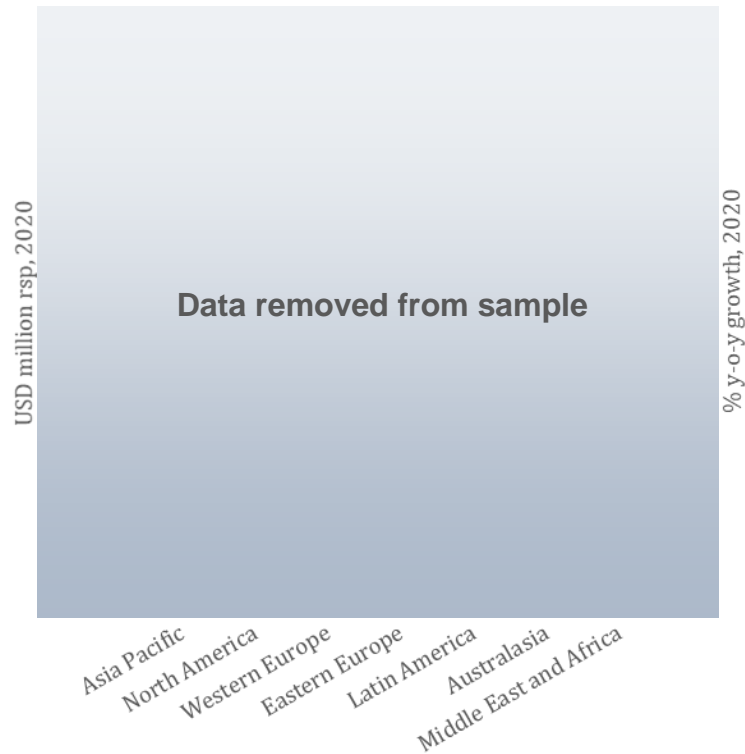


Despite COVID-19, OTC forecasts will eventually settle at historic norms



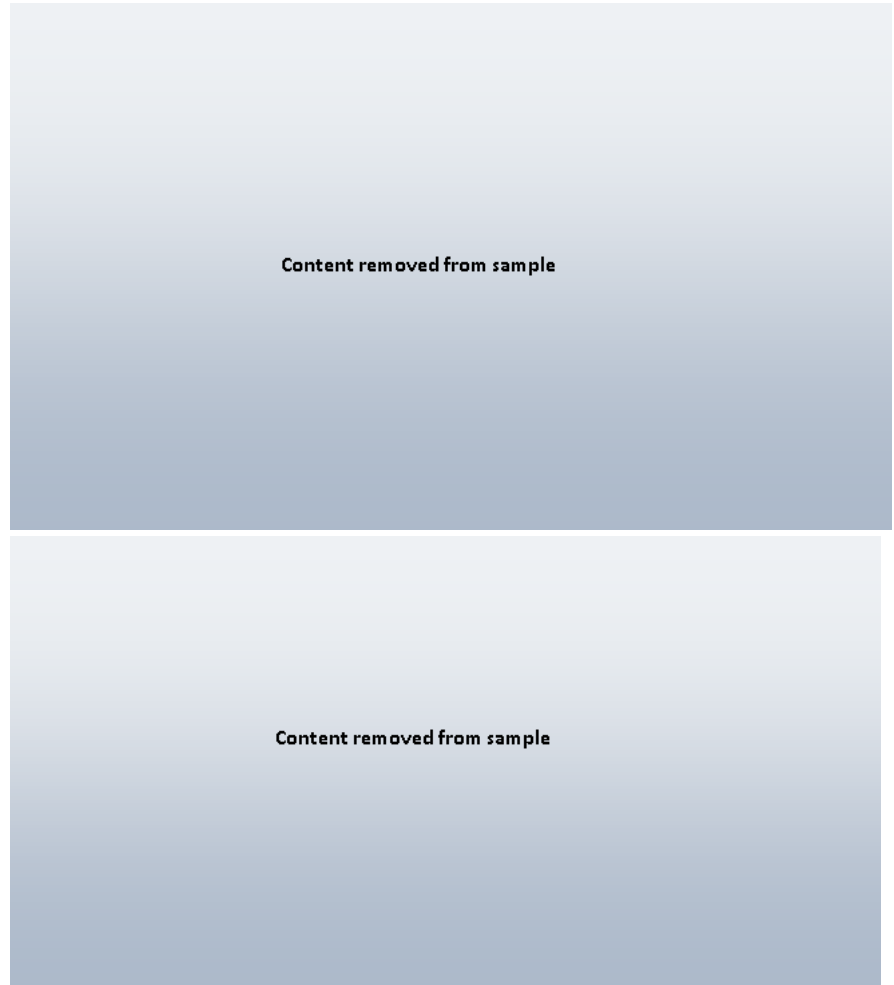
Immunity sustains VDS growth globally in 2020, but can it continue?

Growth in Immunity and Other VDS, 2020

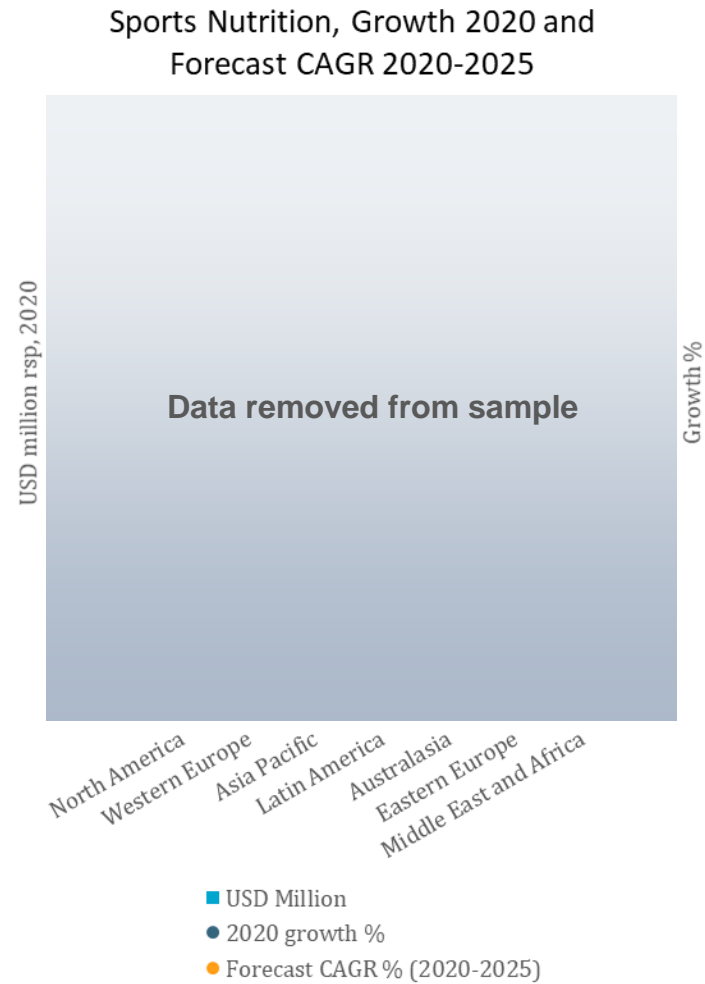


- Immunity-Positioned VDS
- Other VDS
- Immunity VDS Growth %, 2020
- Other VDS Growth %, 2020

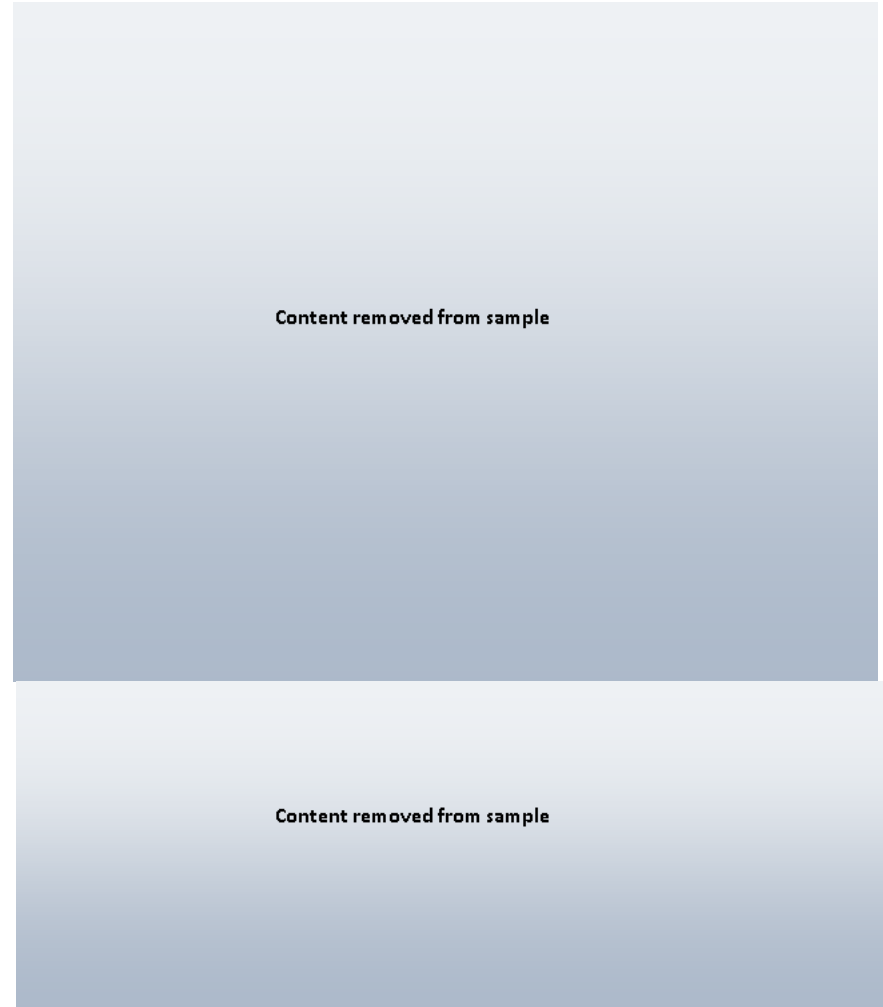
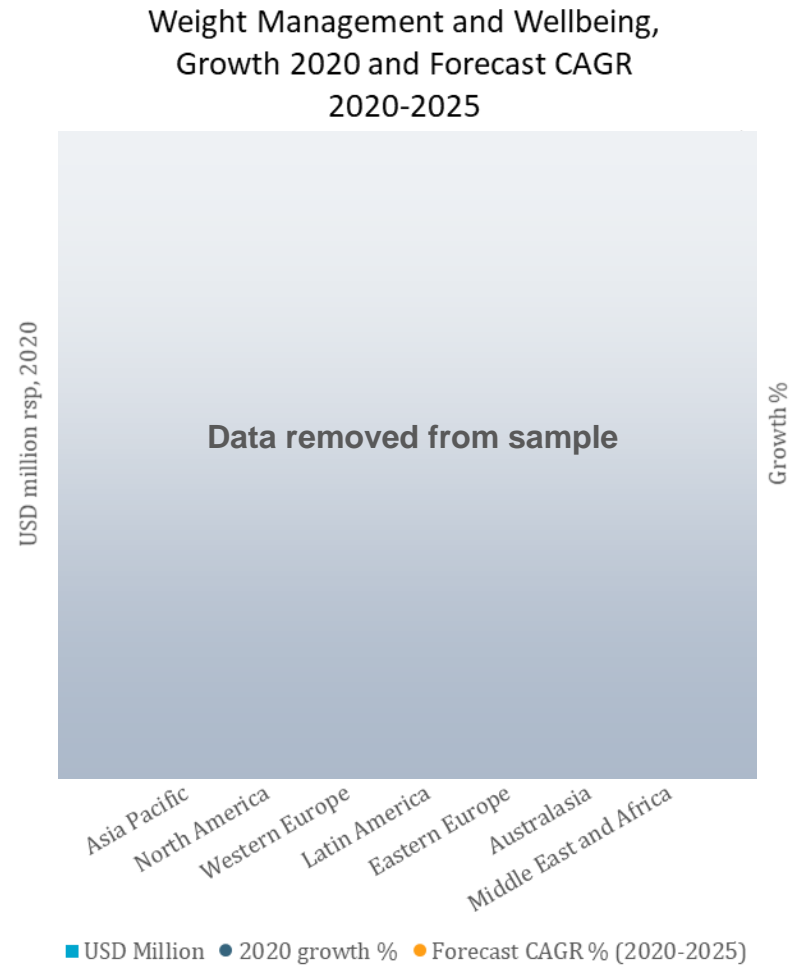
Note: Immunity-Positioned Vitamins and Dietary Supplements includes Immune System Dietary Supplements, Vitamin C and Vitamin D.



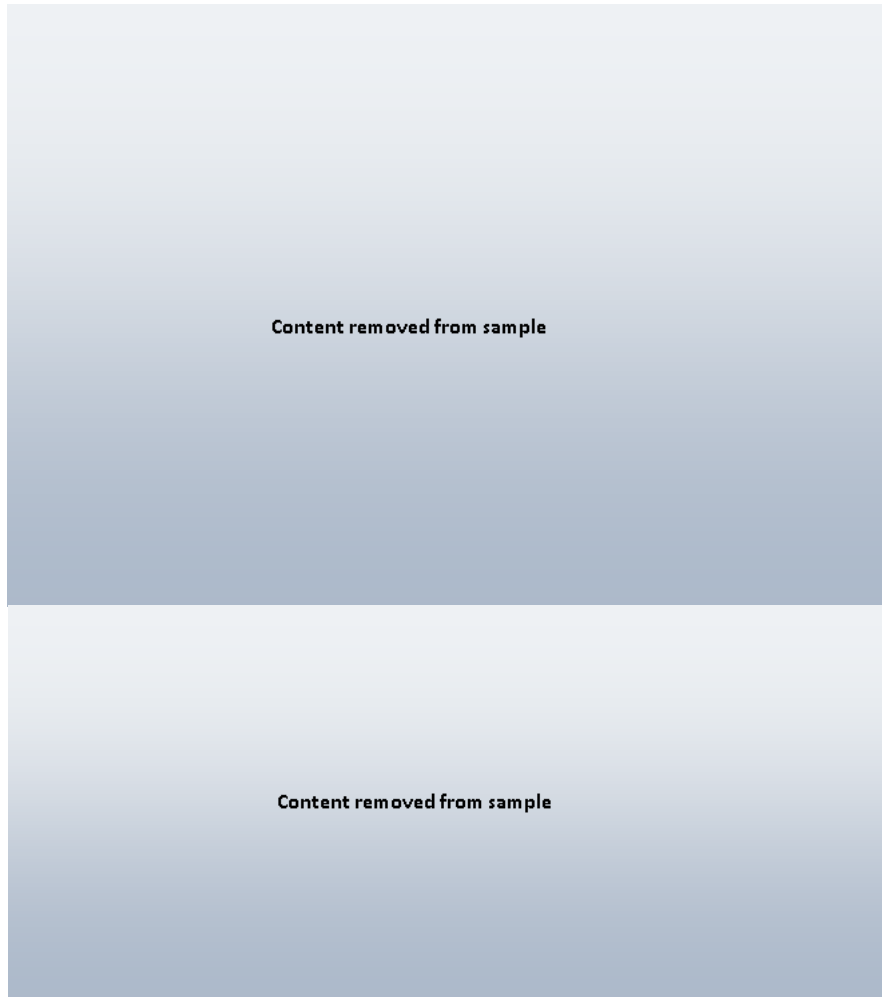
Sports nutrition suffers in 2020, likely to rebound quickly in forecast



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



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



Consumer Health: Retail Distribution by Outlet 2020

Historic CAGR

Chemists/Pharmacies

Drugstores/parapharmacies

Grocery Retailers

E-Commerce

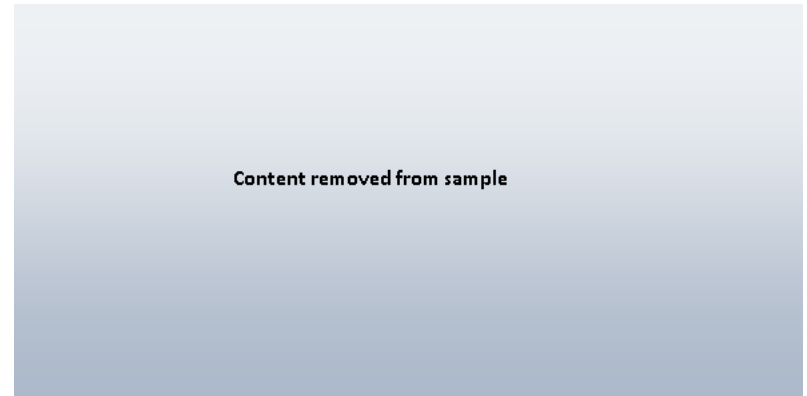
Direct Selling

Mixed Retailers

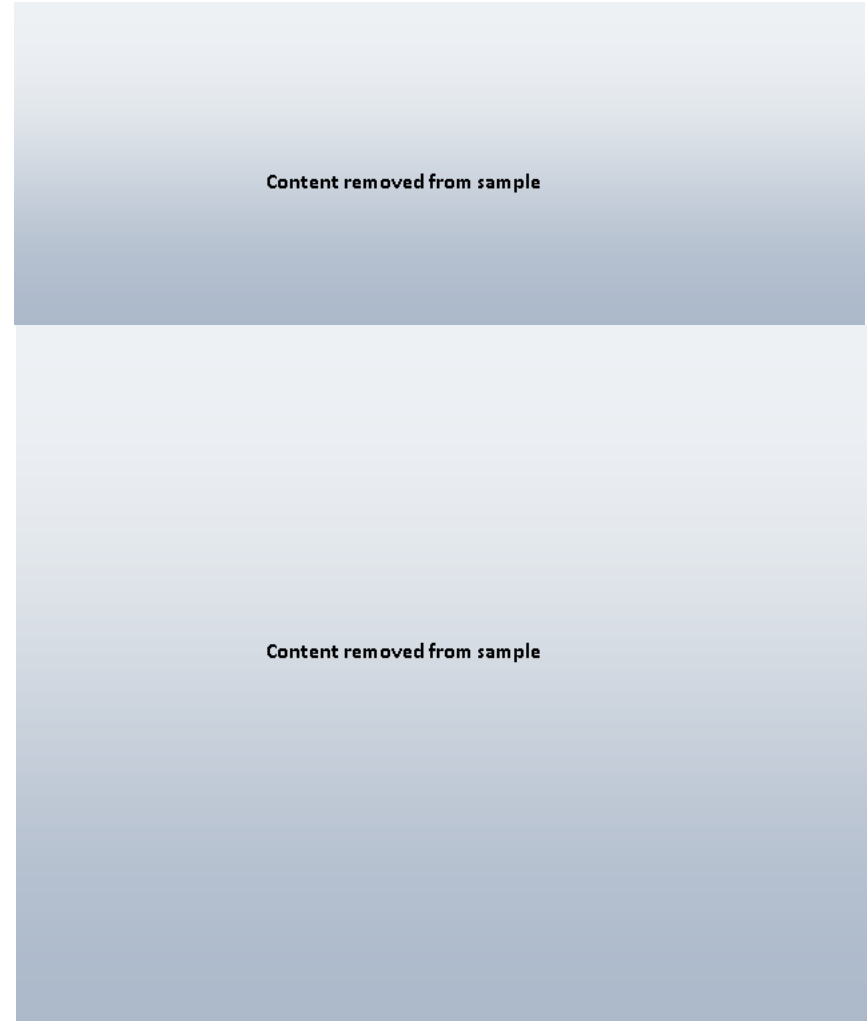
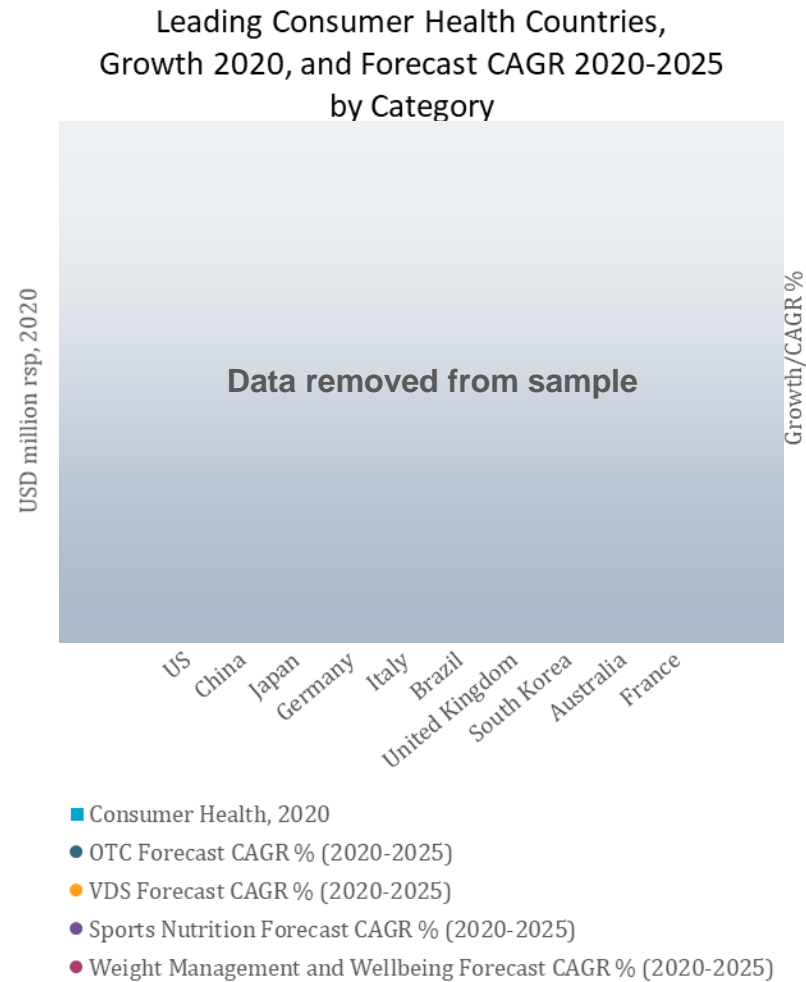
Homeshipping

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Channel Size USD million



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



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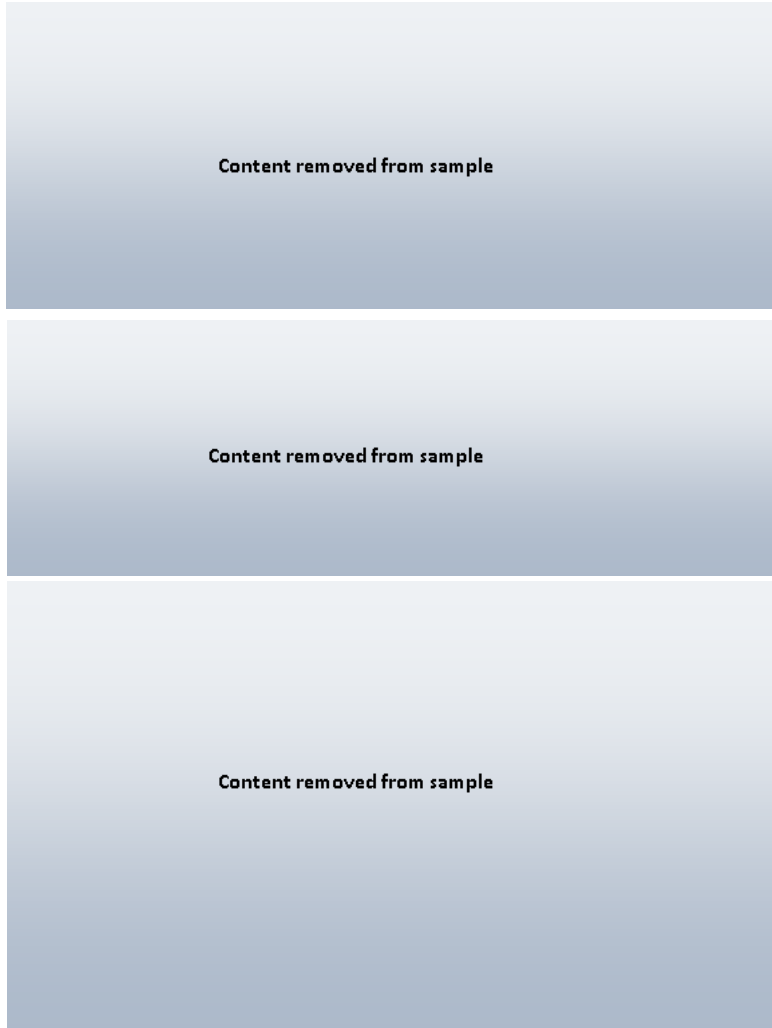
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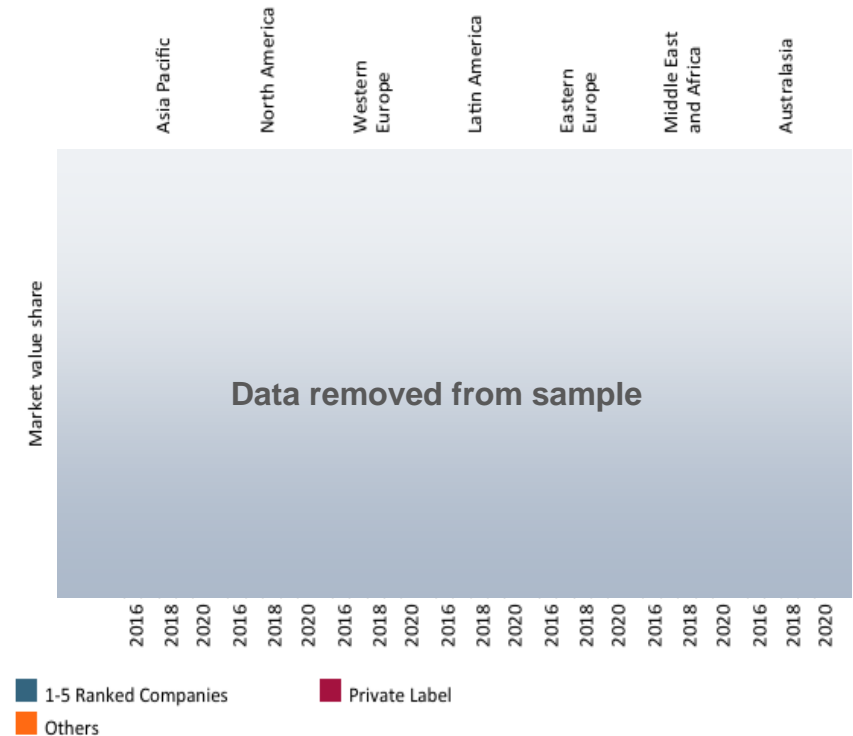


COVID-19 limits gains by upstarts, provides promising area for acquisitions



Consumer Health: Market Fragmentation by Region 2015-2020

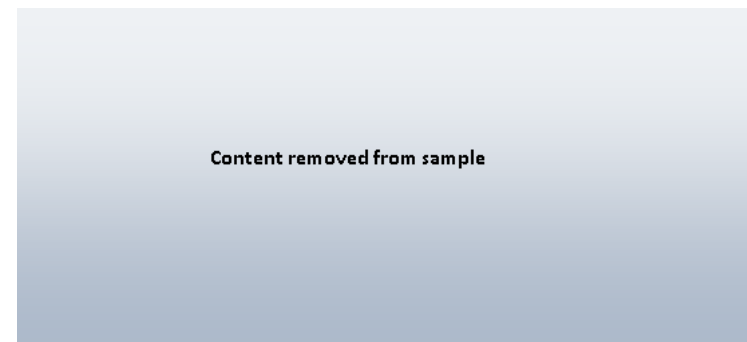
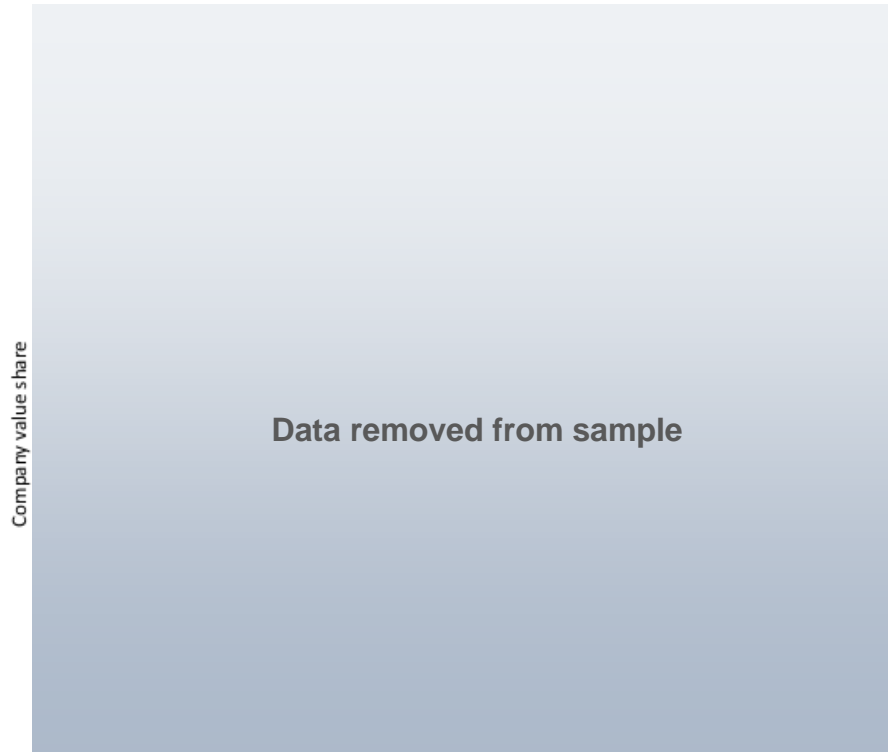
% market value share - USD million



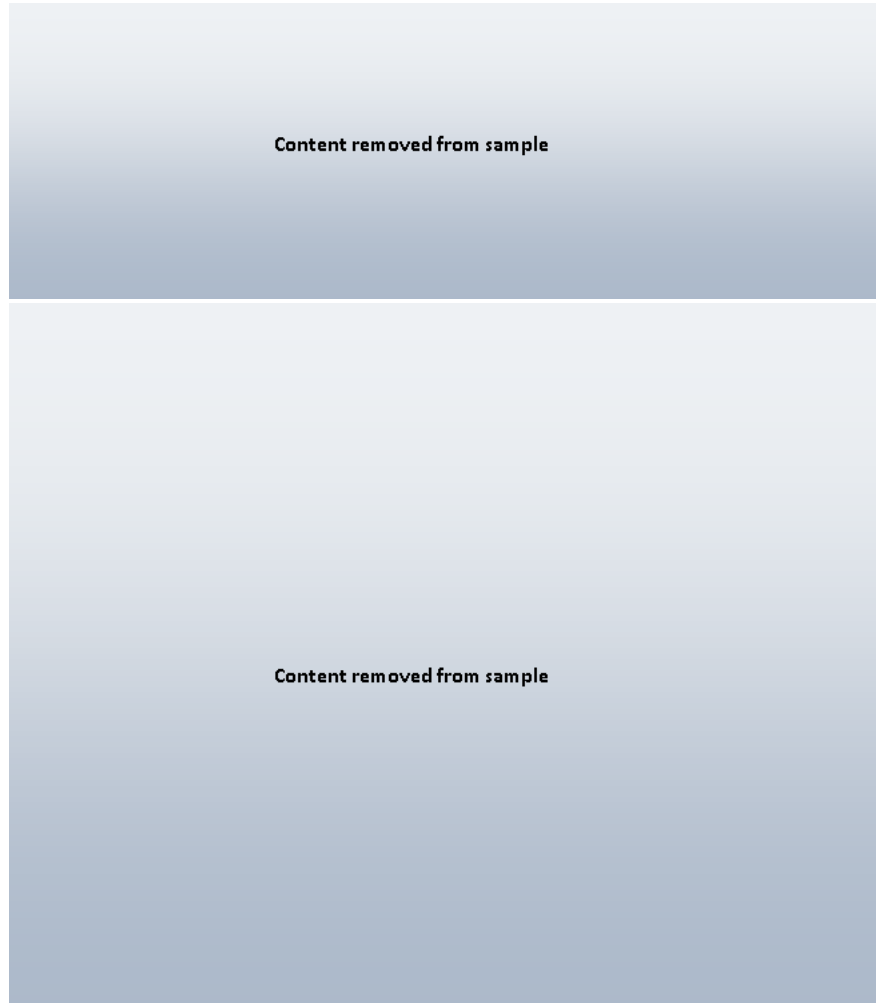
Performance in 2020 among leaders depends on COVID-19 compatibility

Consumer Health: Top 10 Companies 2015-2020

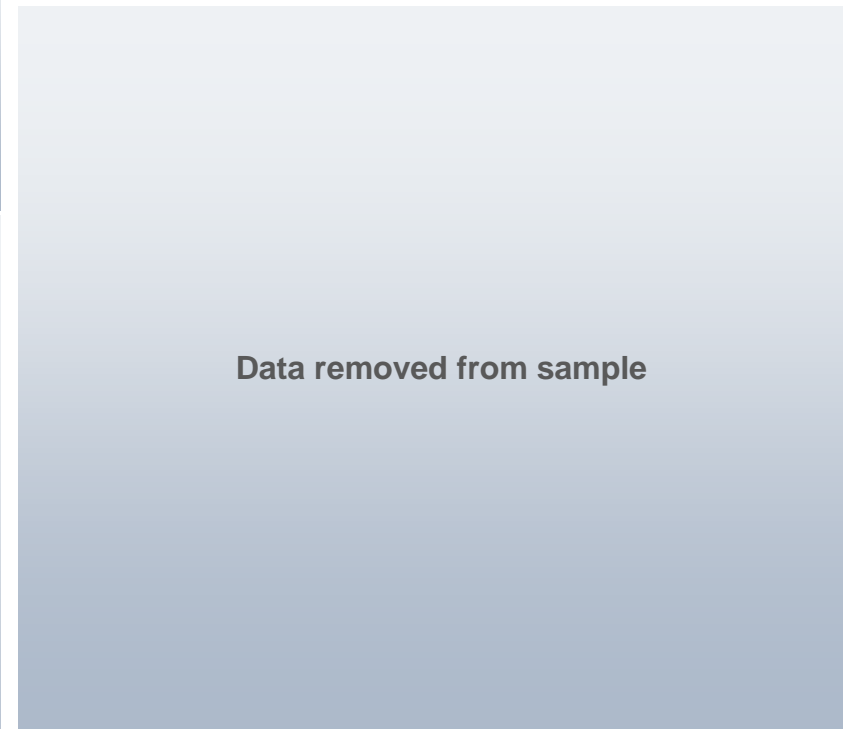
% company value share - USD million



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



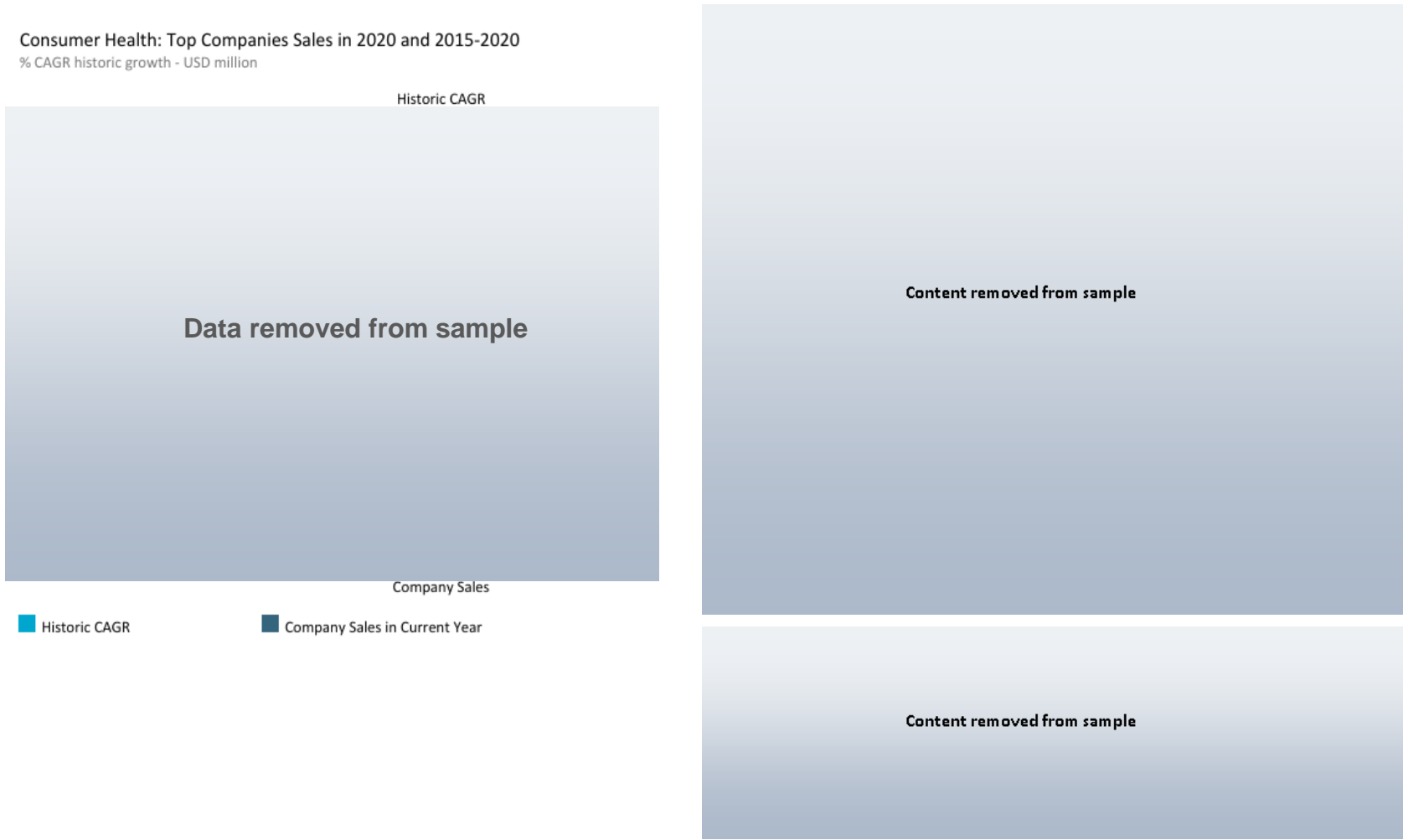
Sales of Top 10 Consumer Health Companies by Category 2020



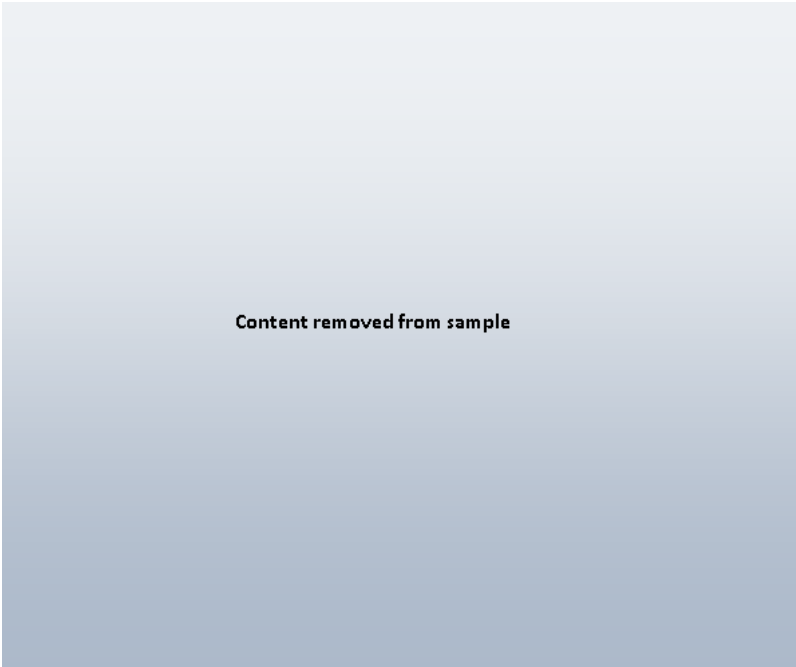
USD million

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

Top growing companies cluster in prevention categories

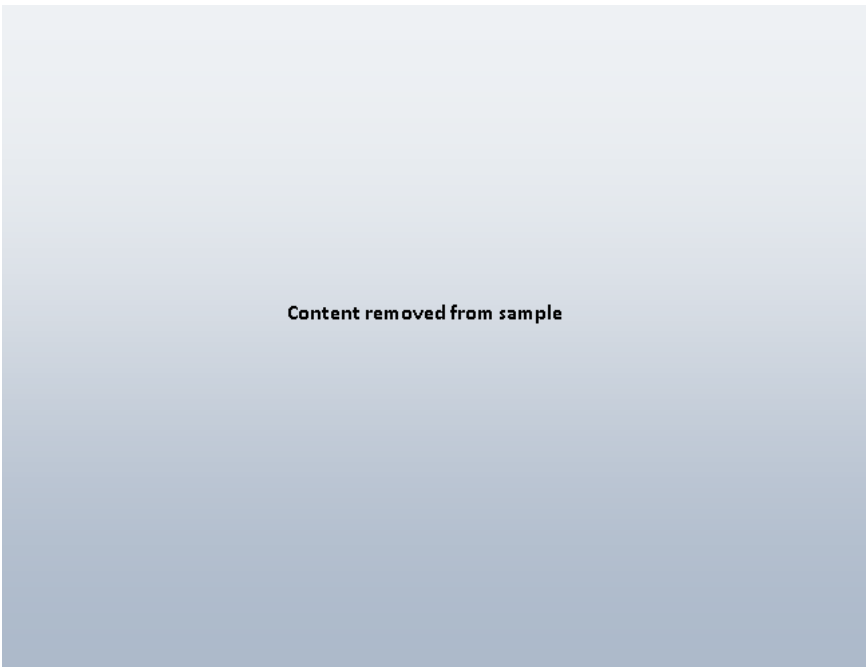
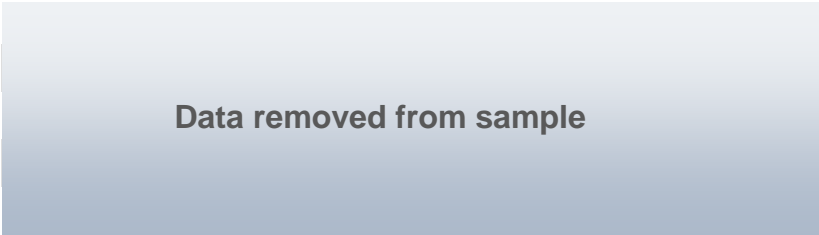


Market fragmentation: OTC products



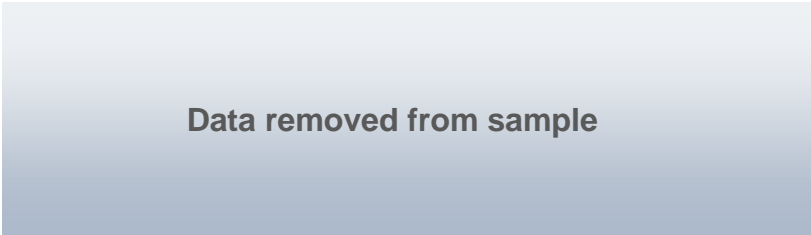
Top OTC Companies Retail Value Share 2020

Company (GBO)	% share
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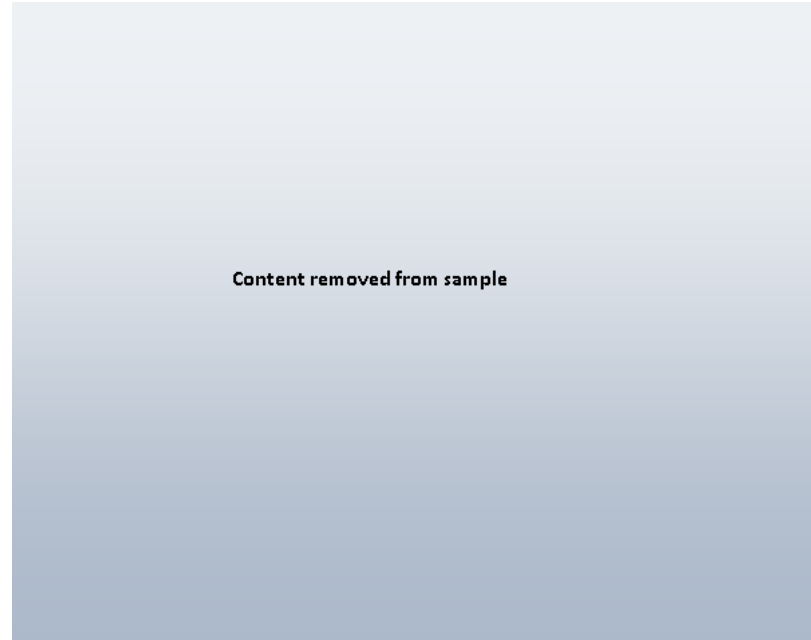
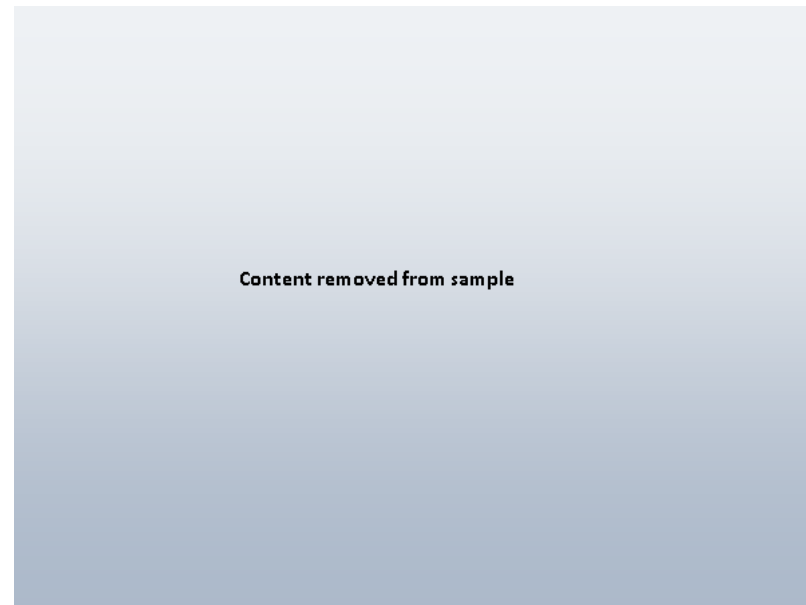


Top OTC Brands Retail Value Share 2020

Brand	Company (GBO)	% share
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Market fragmentation: vitamins and dietary supplements



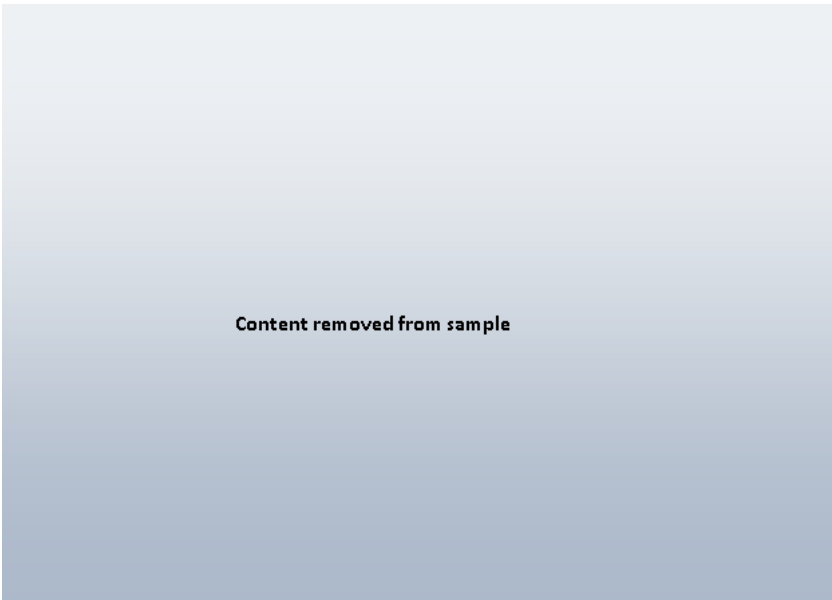
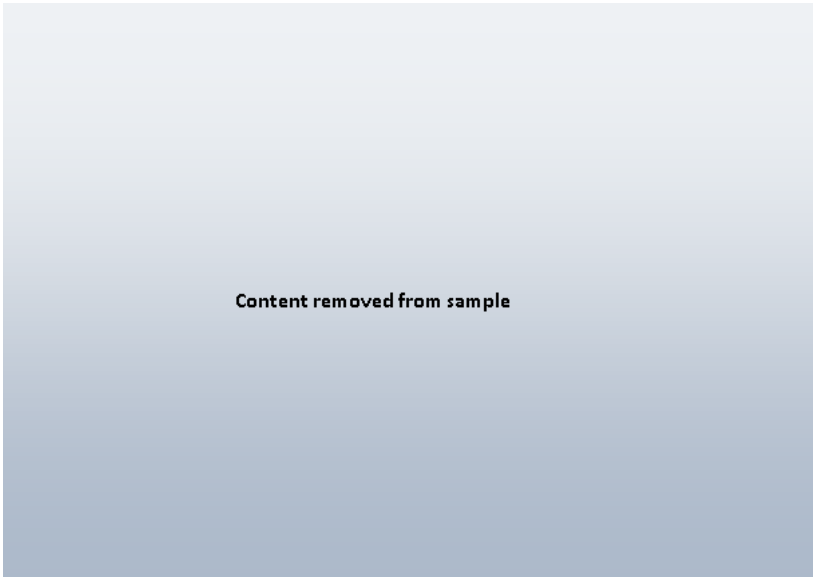
Top VDS Companies Retail Value Shares 2020

Company (GBO)	% share
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Top VDS Brands Retail Value Share 2020

Brand	Company (GBO)	% share
Data removed from sample		

Market fragmentation: sports nutrition



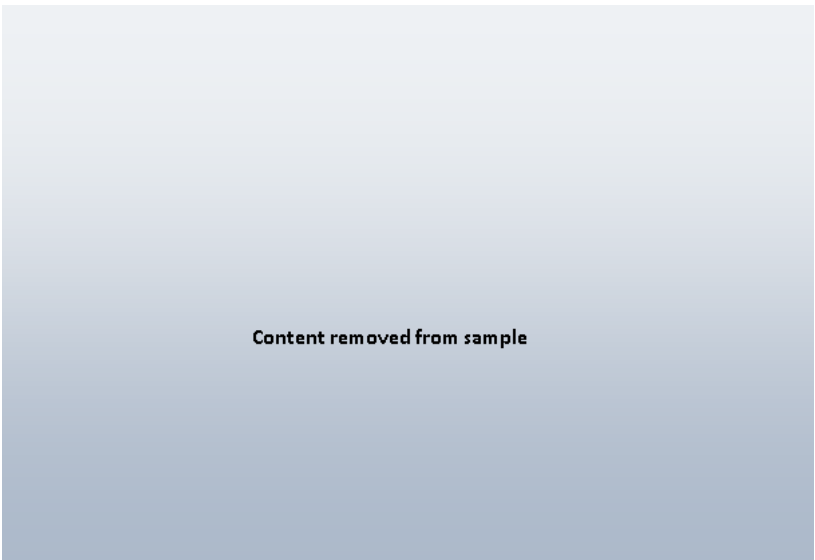
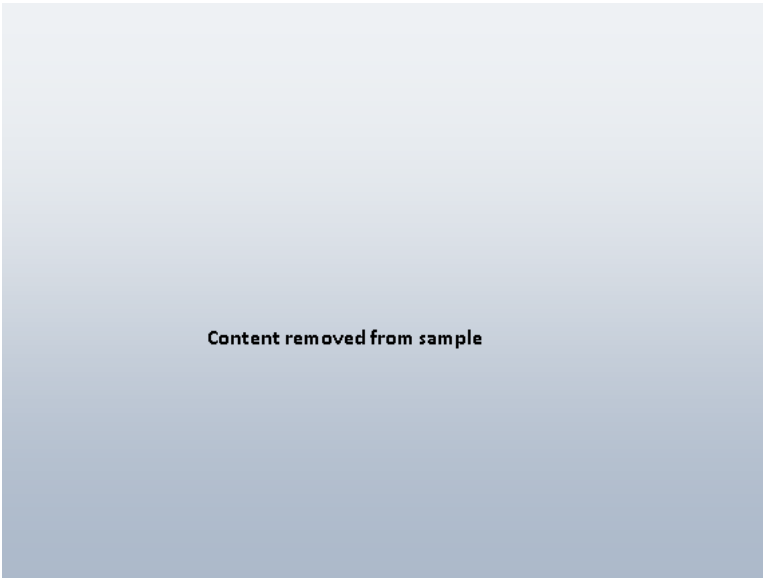
Top Sports Nutrition Companies Retail Value Share 2020

Company (GBO)	% share
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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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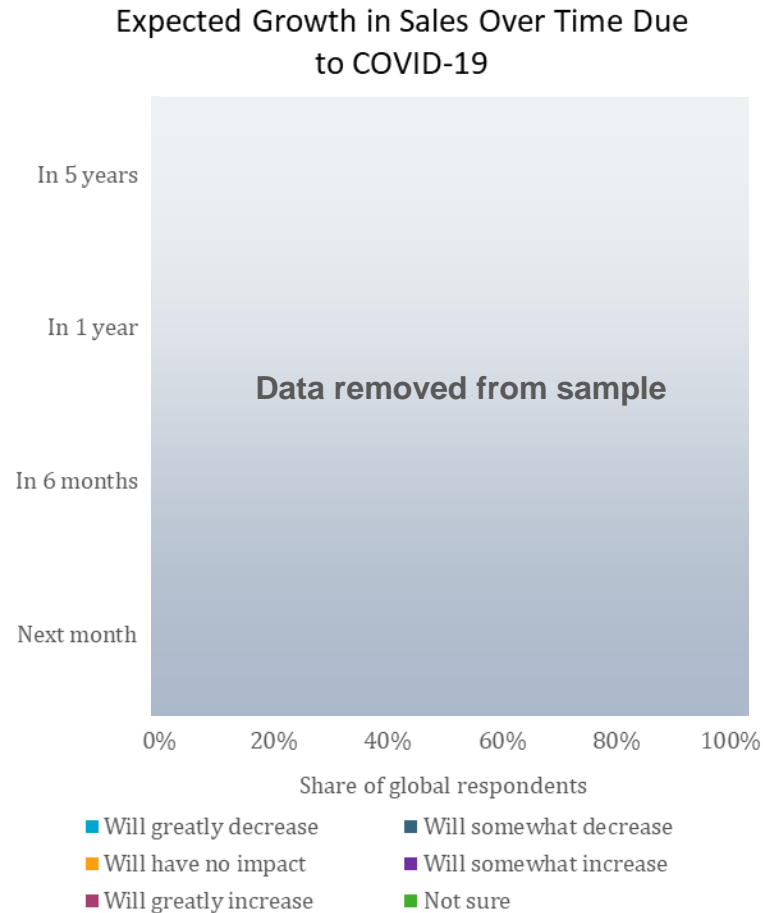
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COVID-19 has broken industry consensus on future growth



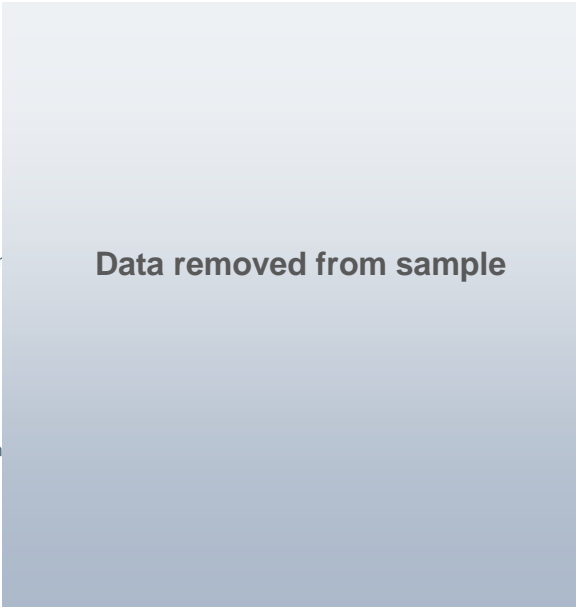
Source: Euromonitor International Voice of the Industry: Consumer Health Survey, May 2020; survey of 449 consumer health experts

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



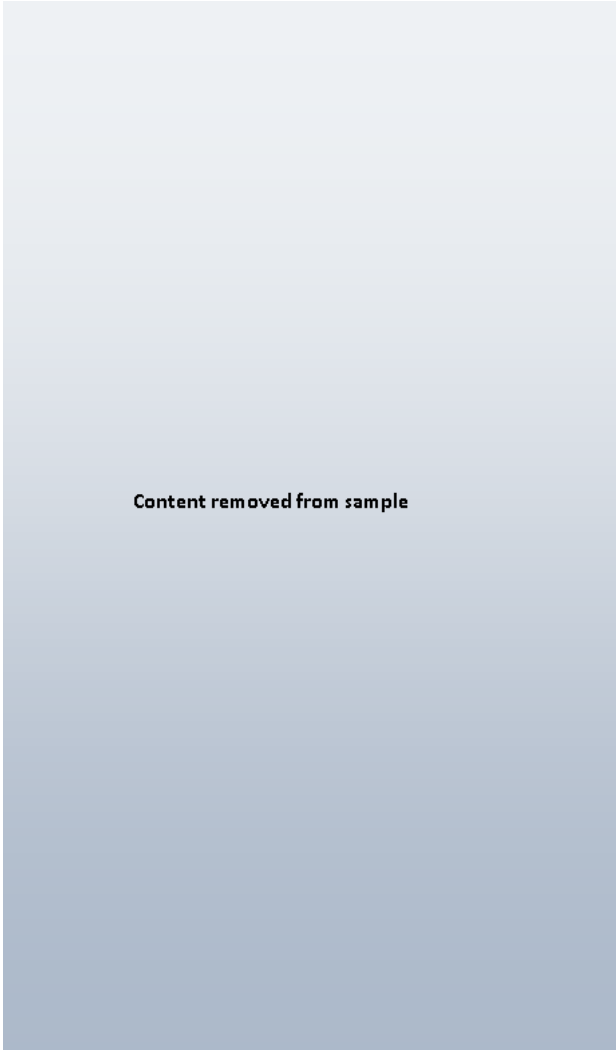
Euromonitor Baseline:

- Positive
- Negative

Pre-C19 Forecasts:

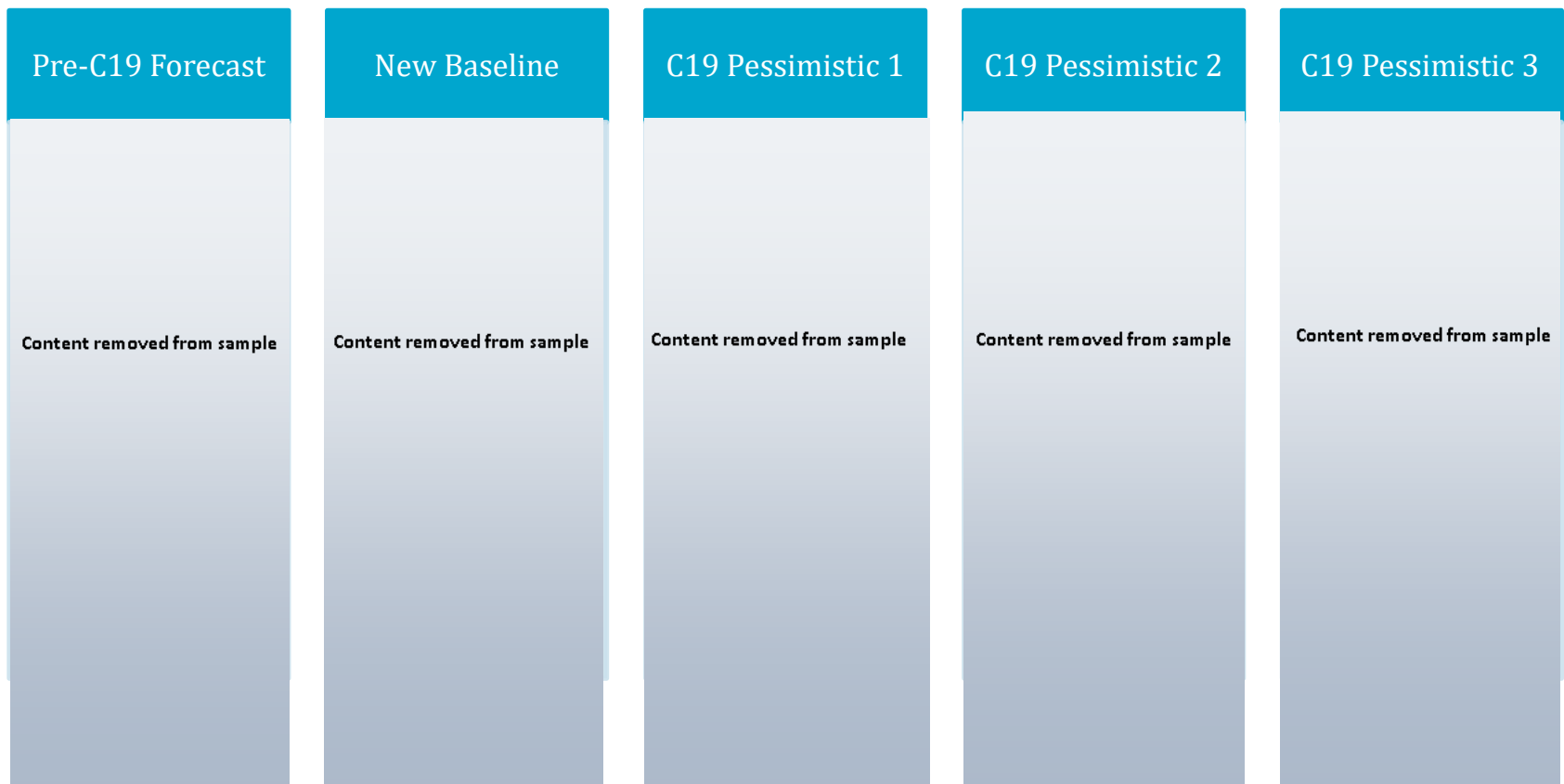
- Positive
- Negative

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.

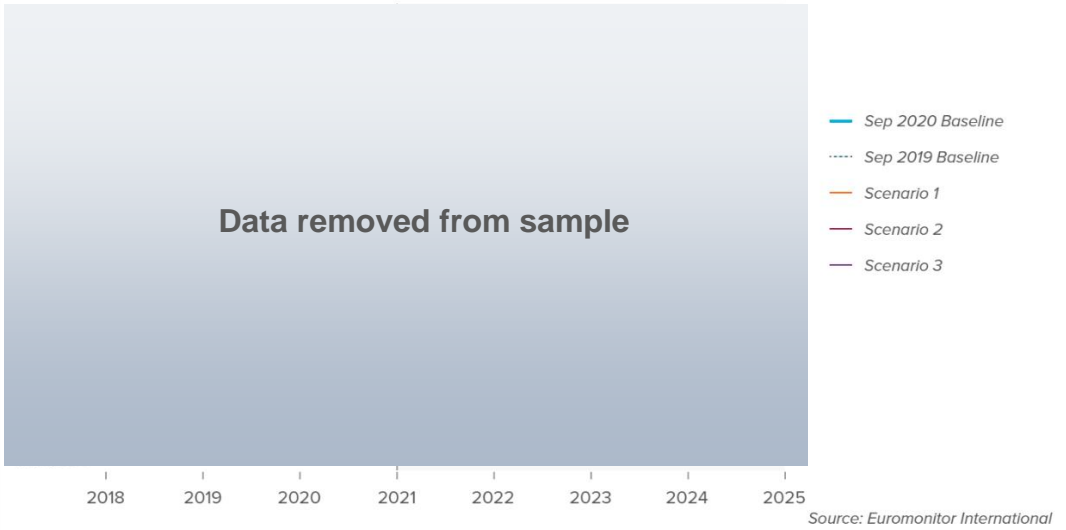


Pessimistic scenarios shackle near-term growth prospects

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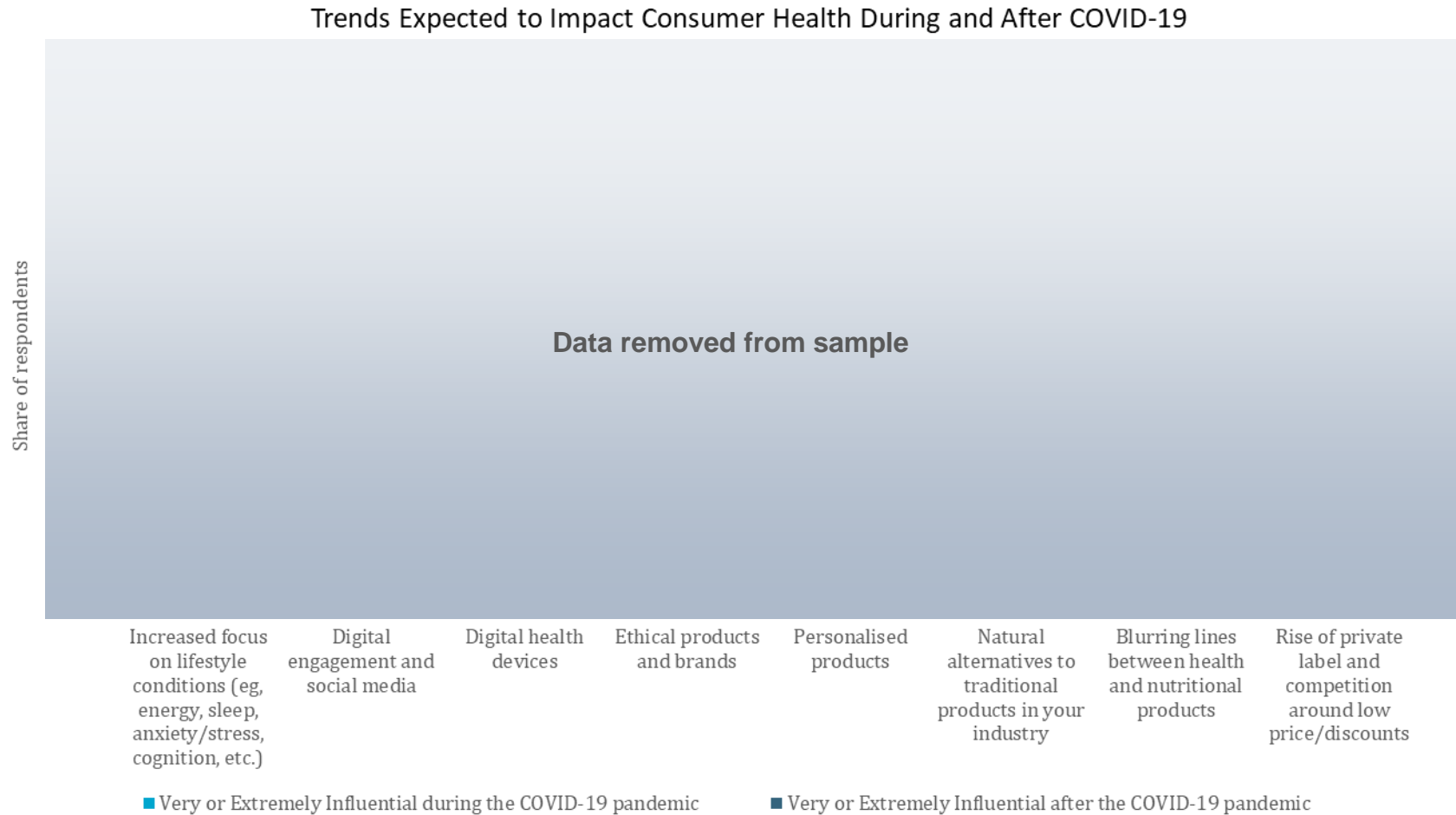
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Consumer Health / Total
Retail Value Sales (2021) Constant USD million



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

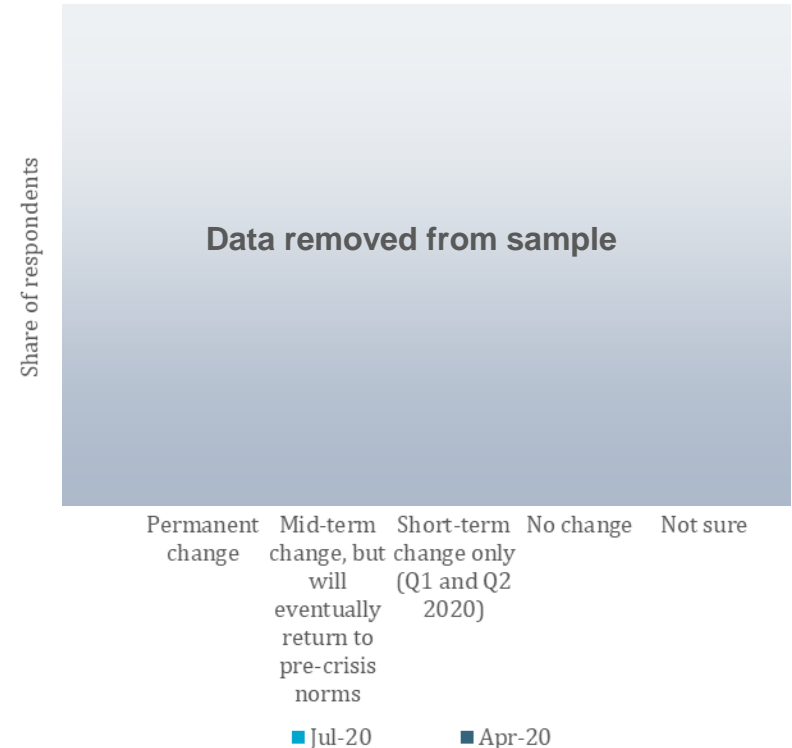


Source: Euromonitor International Voice of the Industry: Consumer Health Survey, May 2020; survey of 449 consumer health experts

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

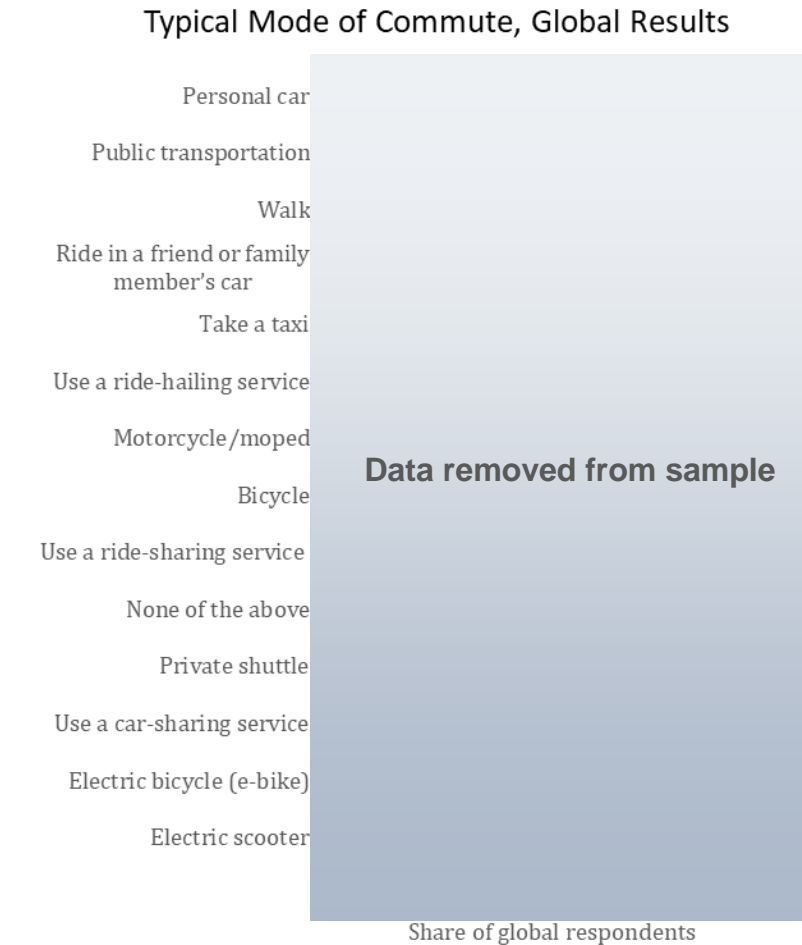


Source: Euromonitor International Voice of the Industry: COVID-19 survey, April and July 2020, n=2,922 (April), n=1,448 (July)

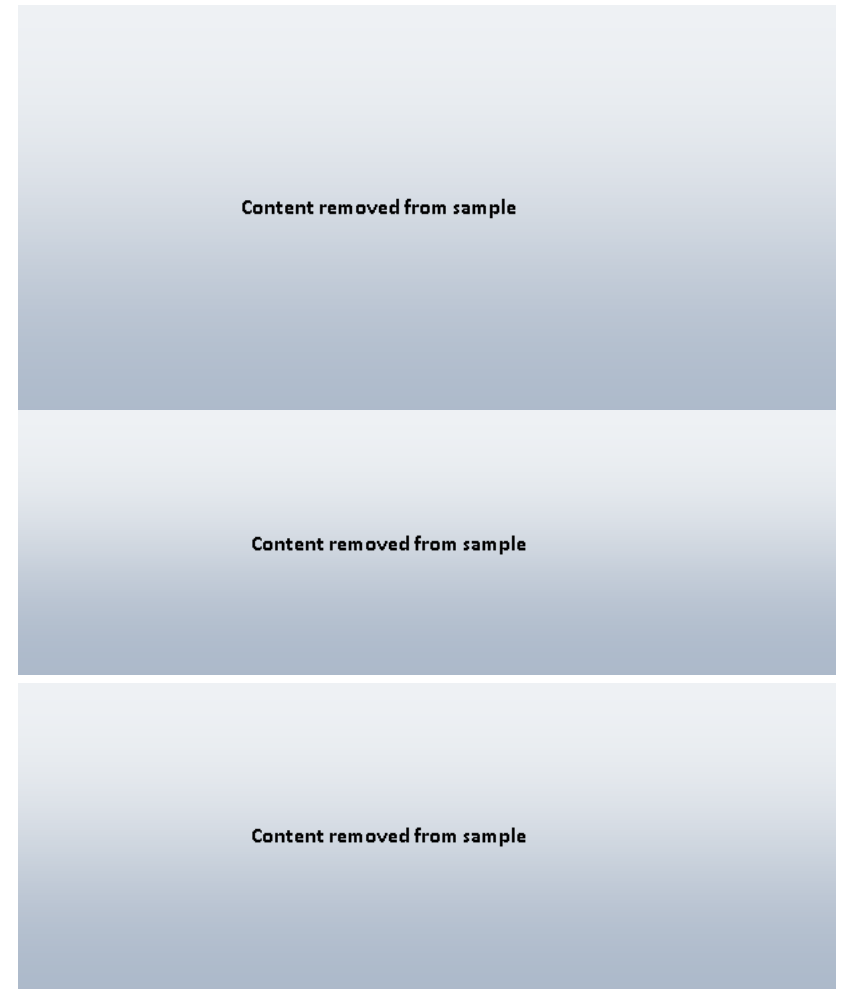
Near-term innovation in immunity likely



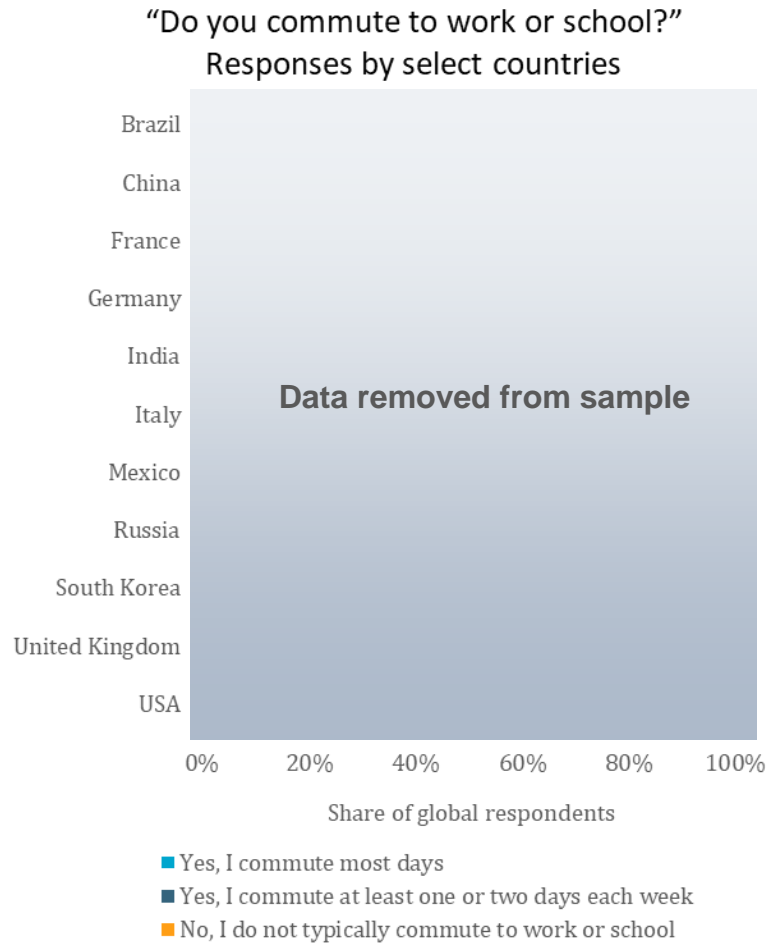
Distancing and limits to movement to constrain sales growth into 2021



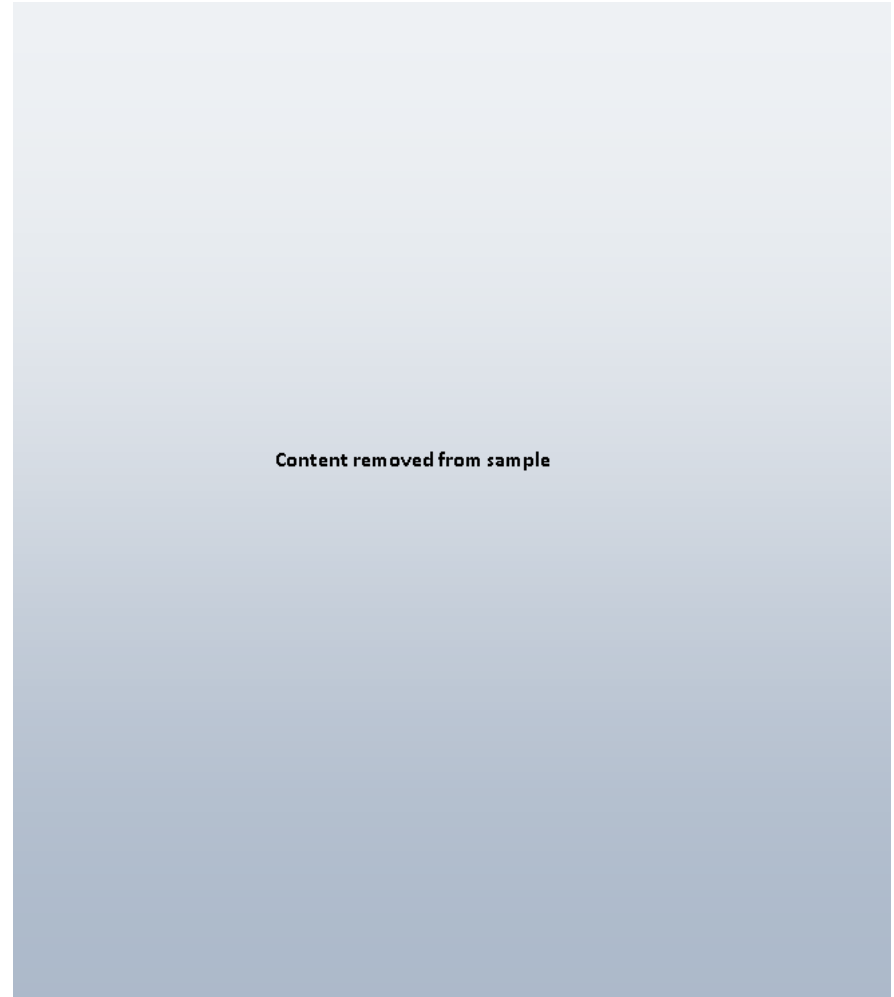
Source: Euromonitor International Mobility Survey 2020, n=30,438



Consumer health rebound tied to trajectory of COVID-19

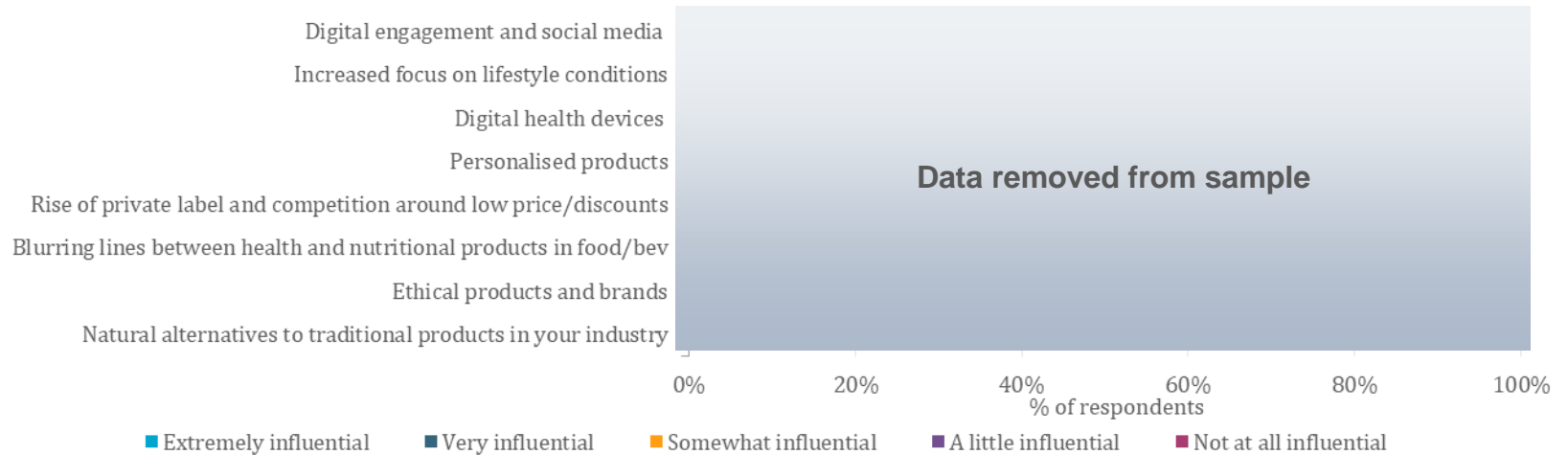


Source: Euromonitor International Mobility Survey 2020, n=30,438

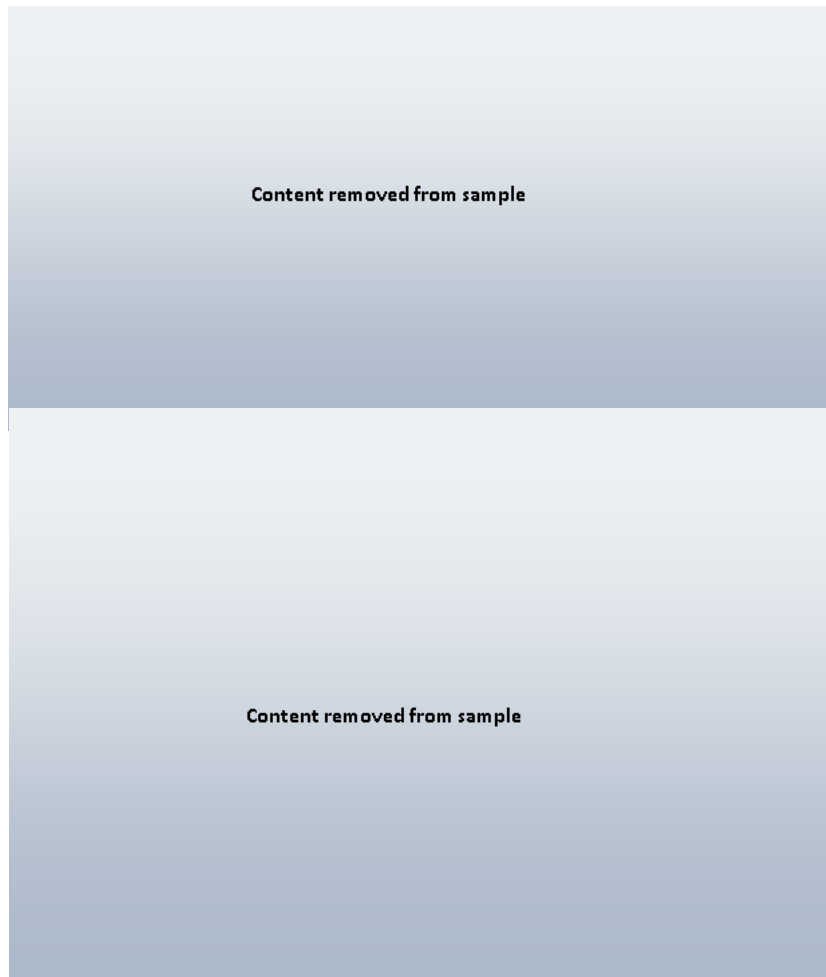


Envisaging the future without COVID-19: Digital health

Trends Expected to Impact Industry After COVID-19



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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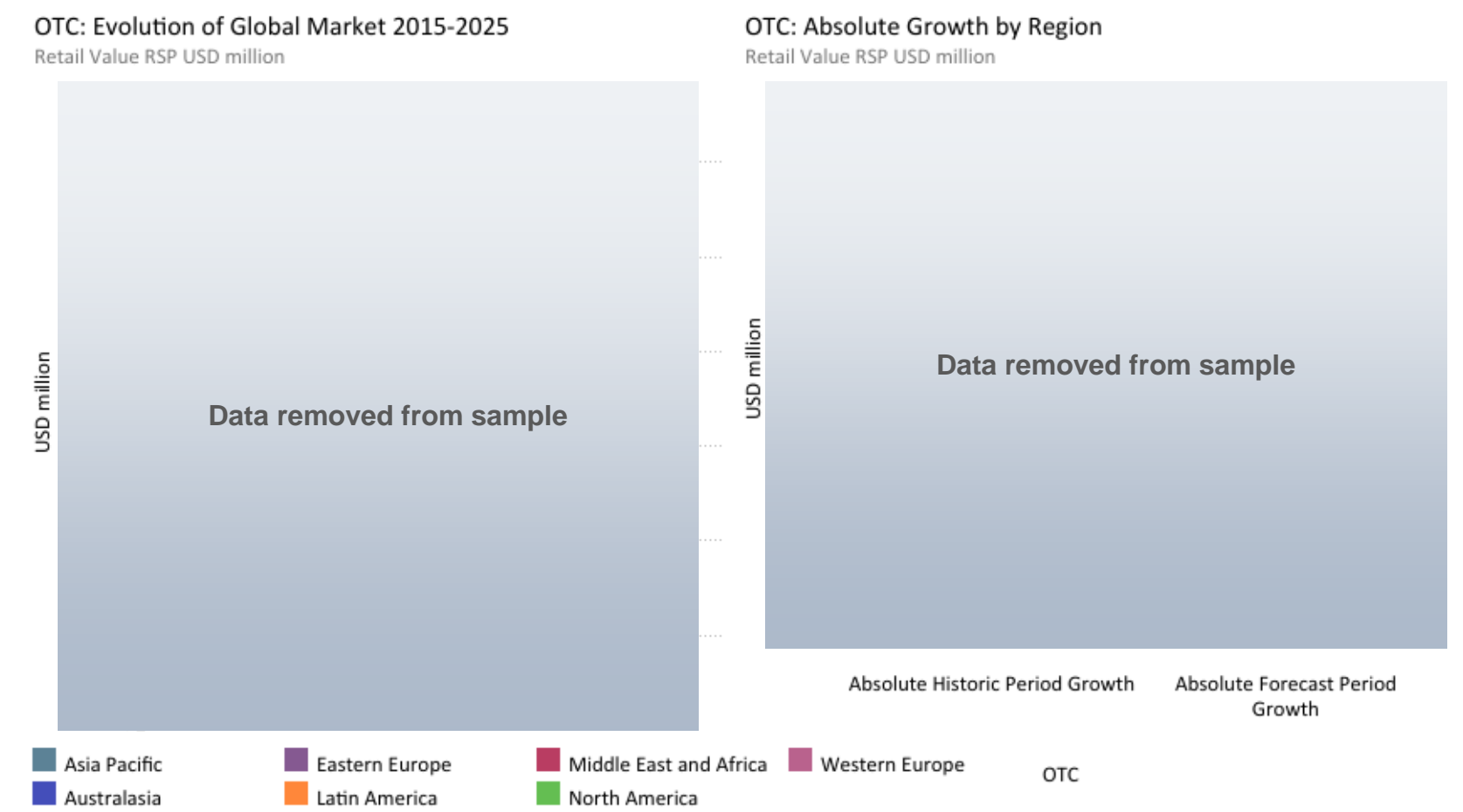
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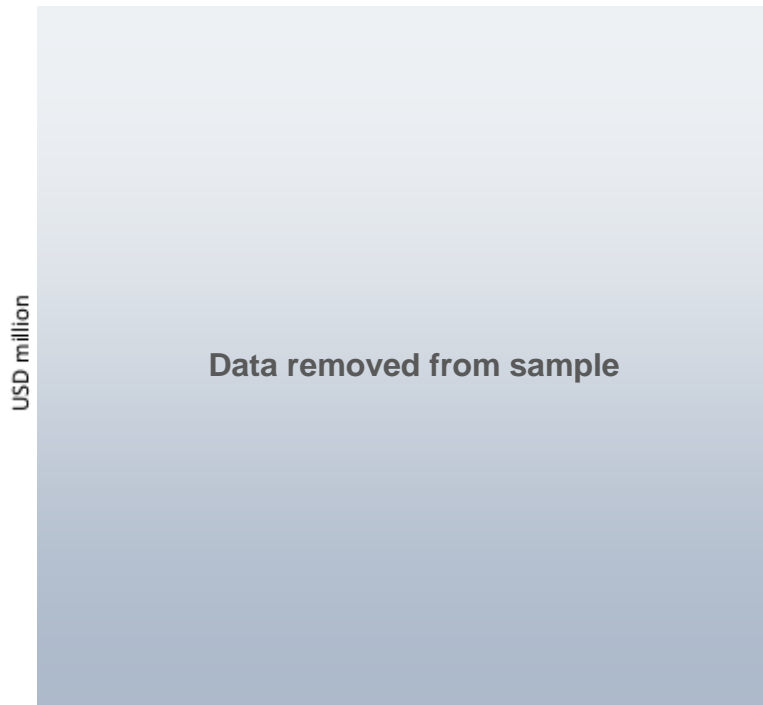
Global snapshot of OTC



Global snapshot of vitamins and dietary supplements

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

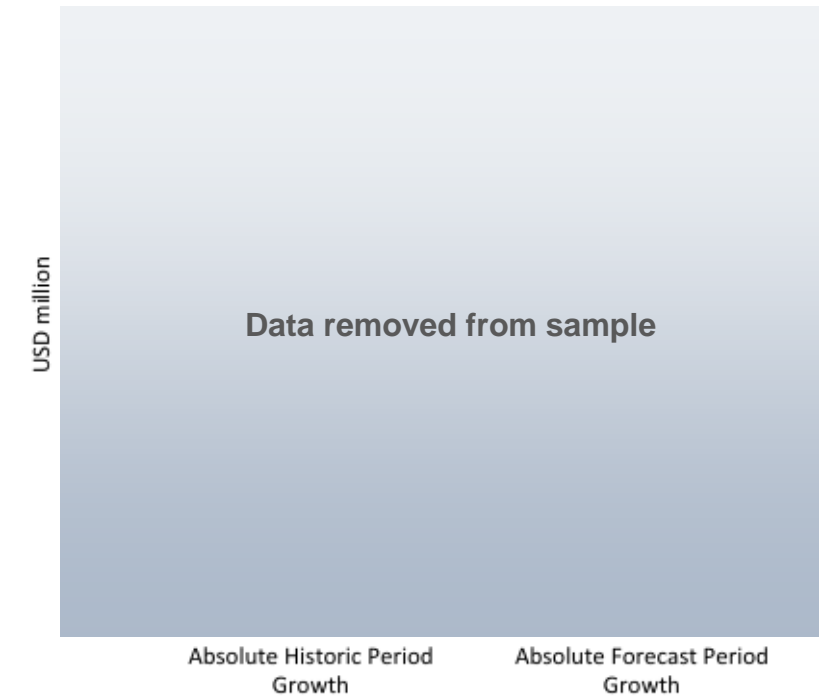
Retail Value RSP USD million



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

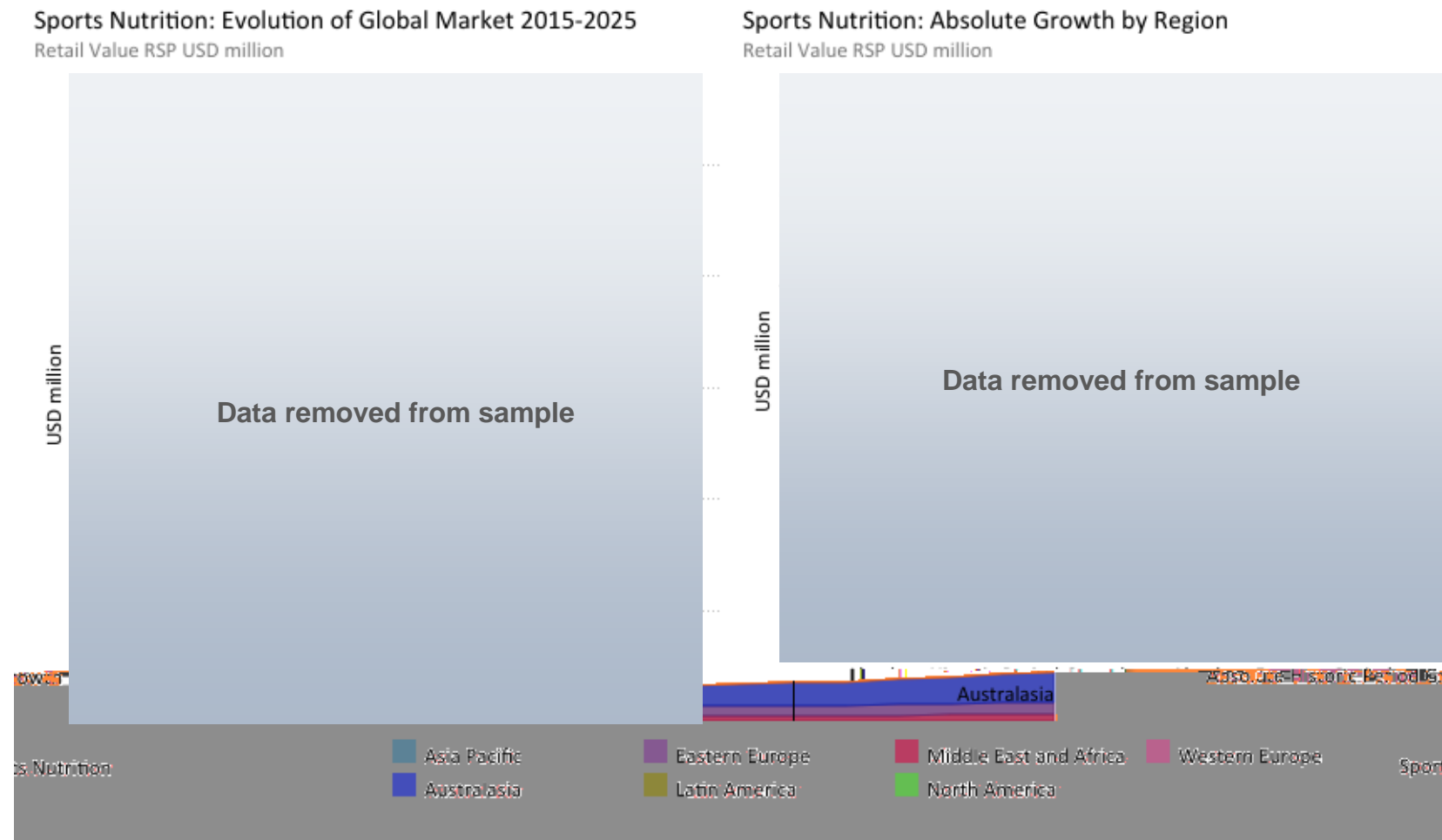
Vitamins and Dietary Supplements: Absolute Growth by Region

Retail Value RSP USD million



Vitamins and Dietary Supplements

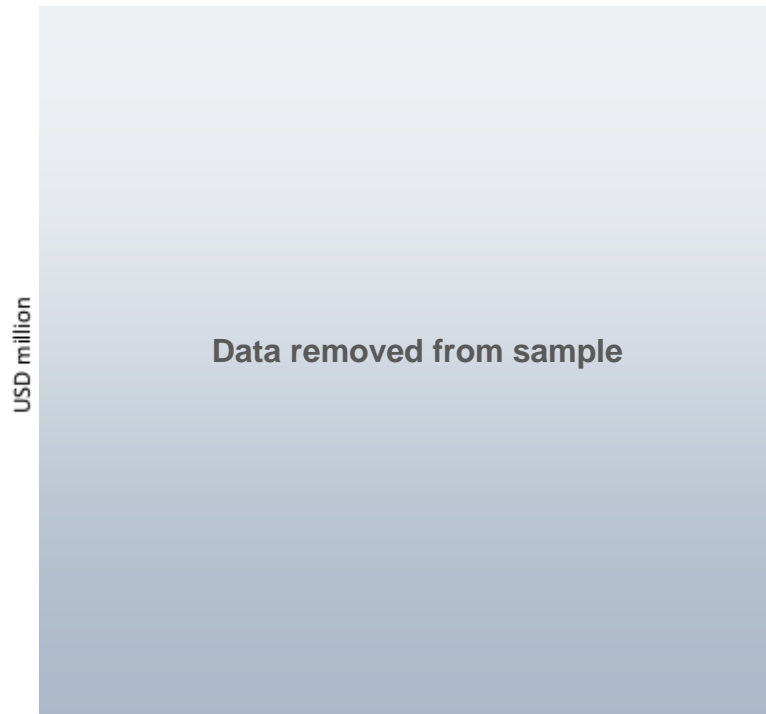
Global snapshot of sports nutrition



Global snapshot of weight management and wellbeing

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

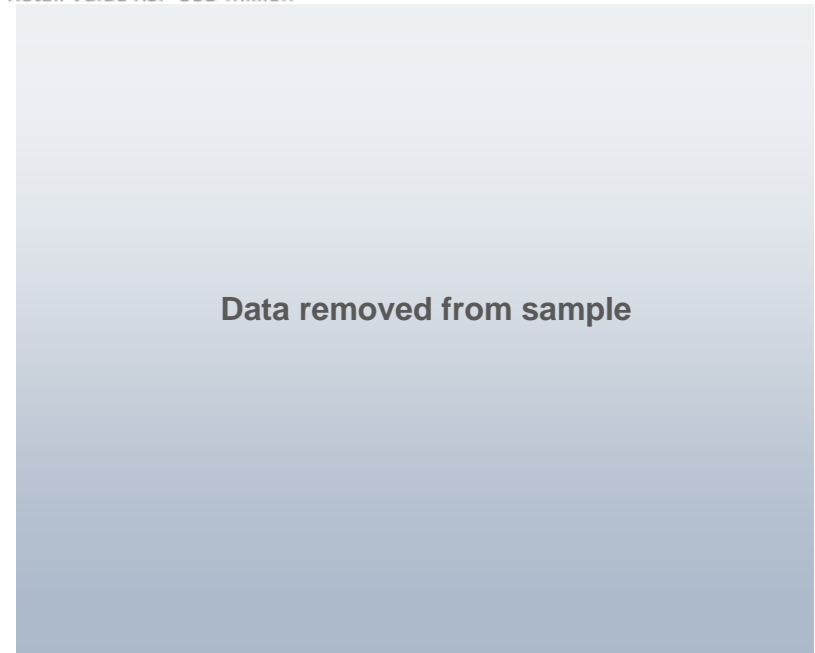
Retail Value RSP USD million



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

Weight Management and Wellbeing: Absolute Growth by Region

Retail Value RSP USD million

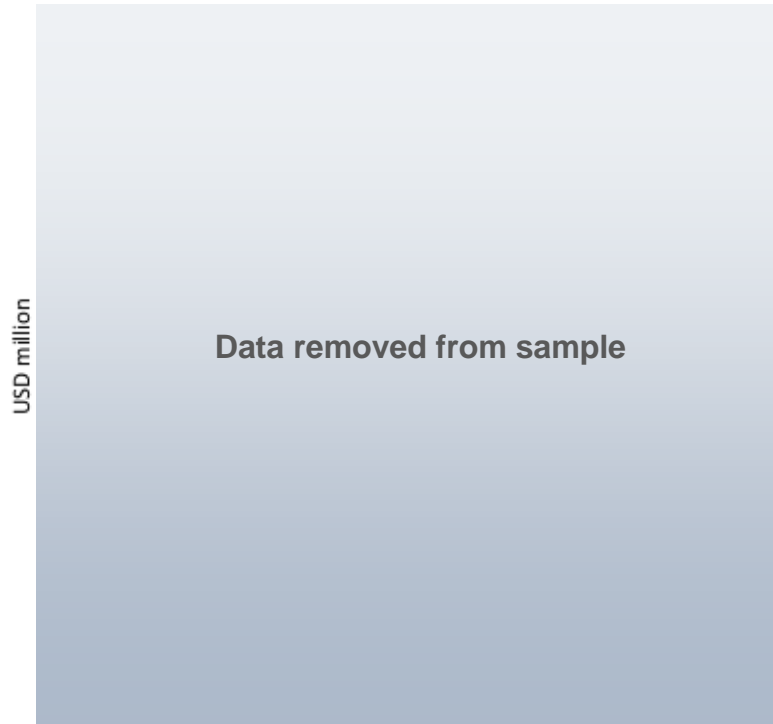


Absolute Historic Period Growth Absolute Forecast Period Growth

Weight Management and Wellbeing

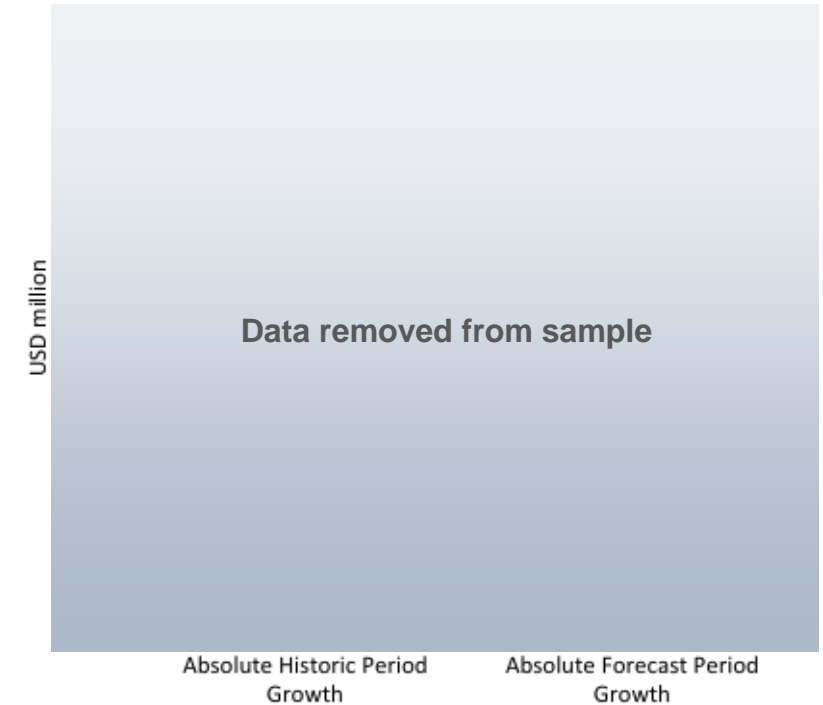
Regional snapshot: Asia Pacific

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



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

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



Asia Pacific

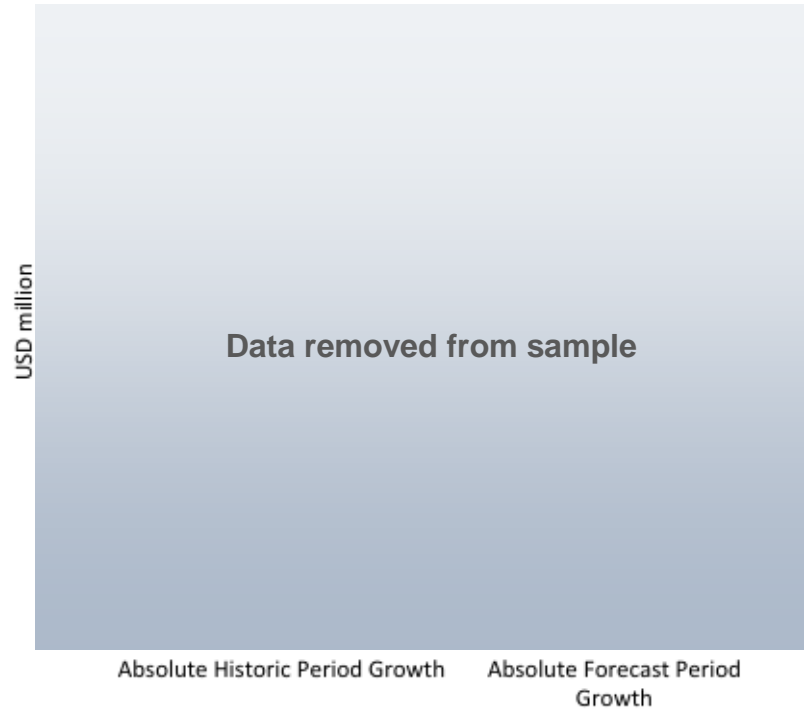
Regional snapshot: North America

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

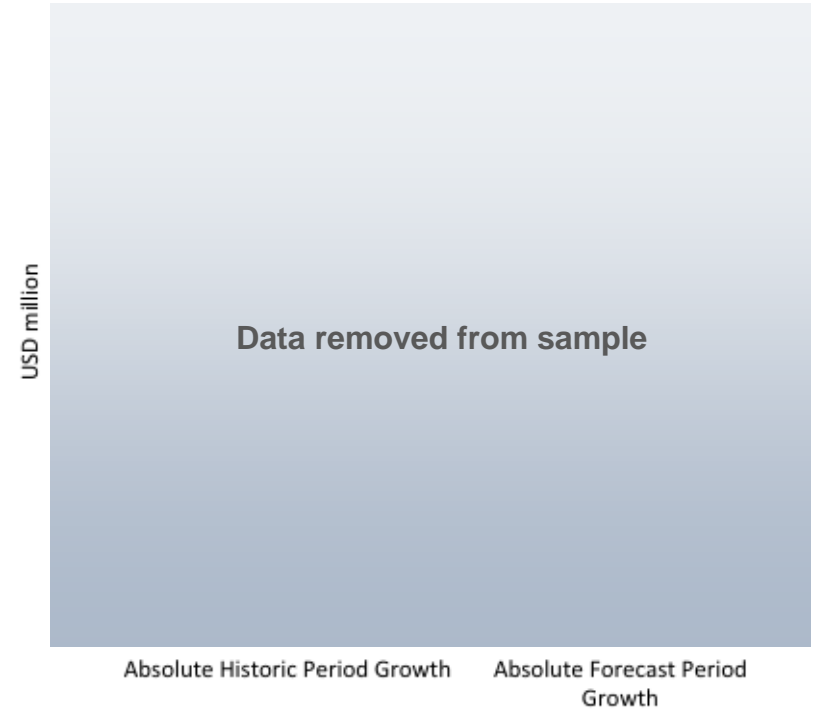
Regional snapshot: Latin America

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



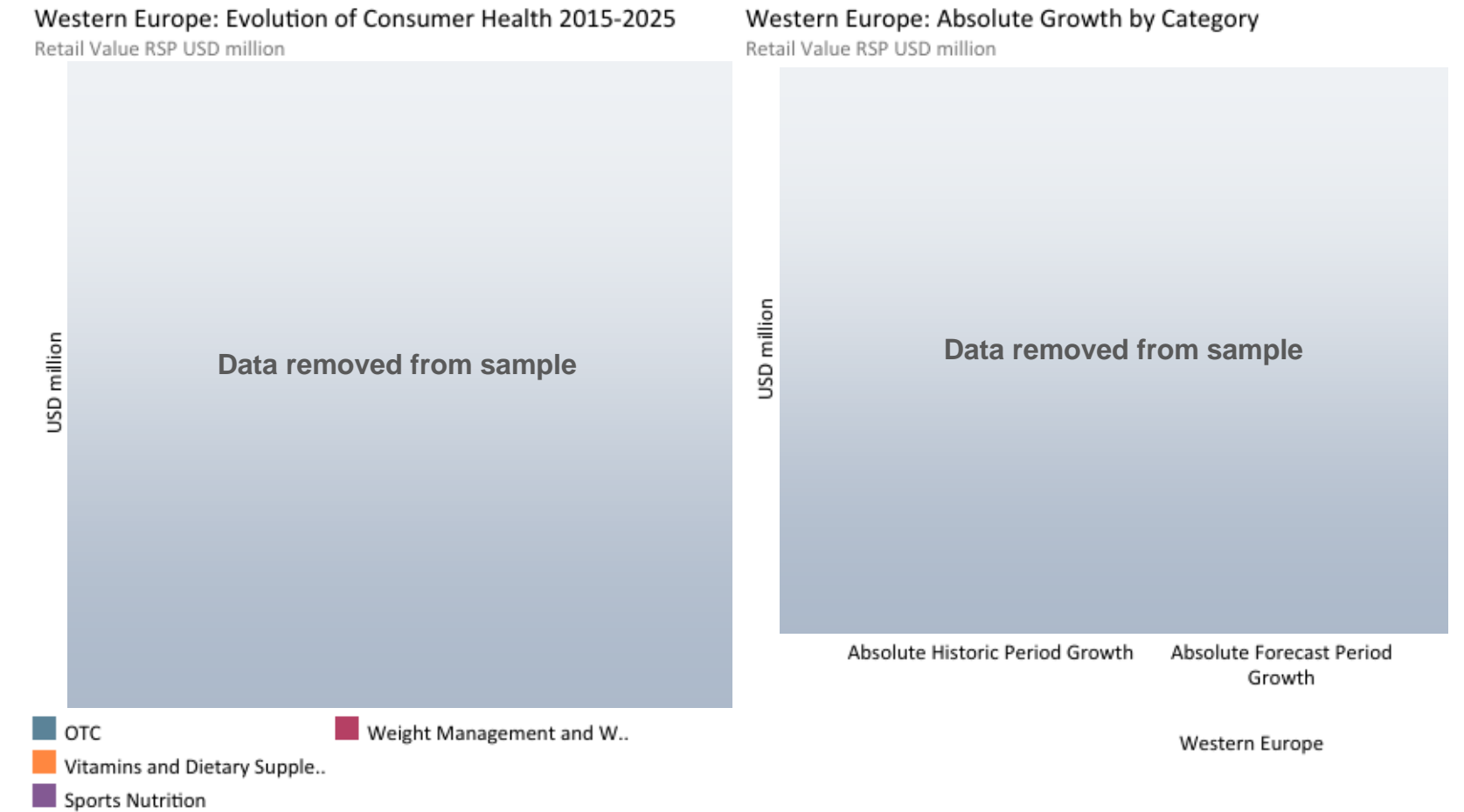
- OTC
- Vitamins and Dietary Supple..
- Weight Management and W..
- Sports Nutrition

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



Latin America

Regional snapshot: Western Europe



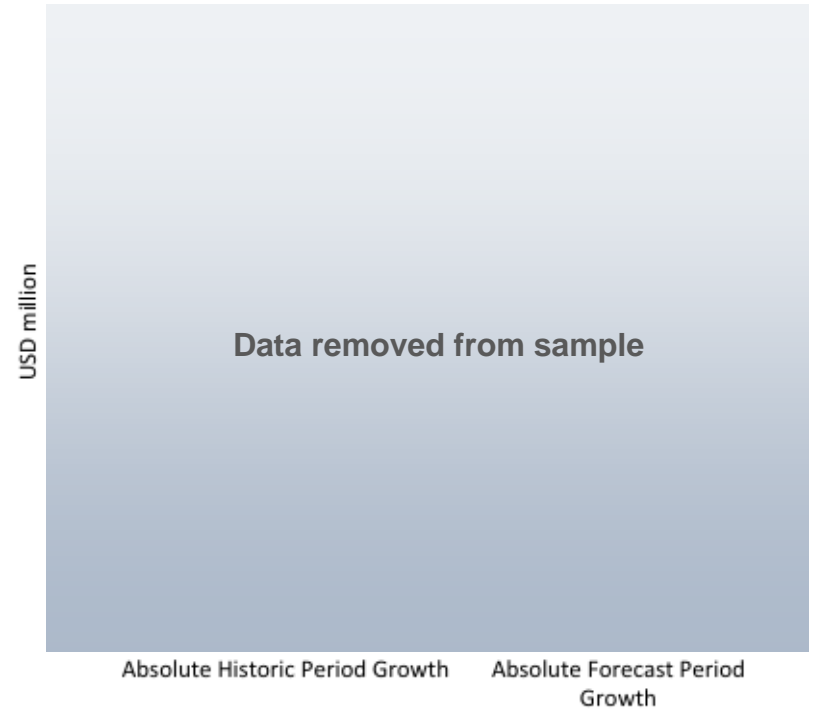
Regional snapshot: Eastern Europe

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



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

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

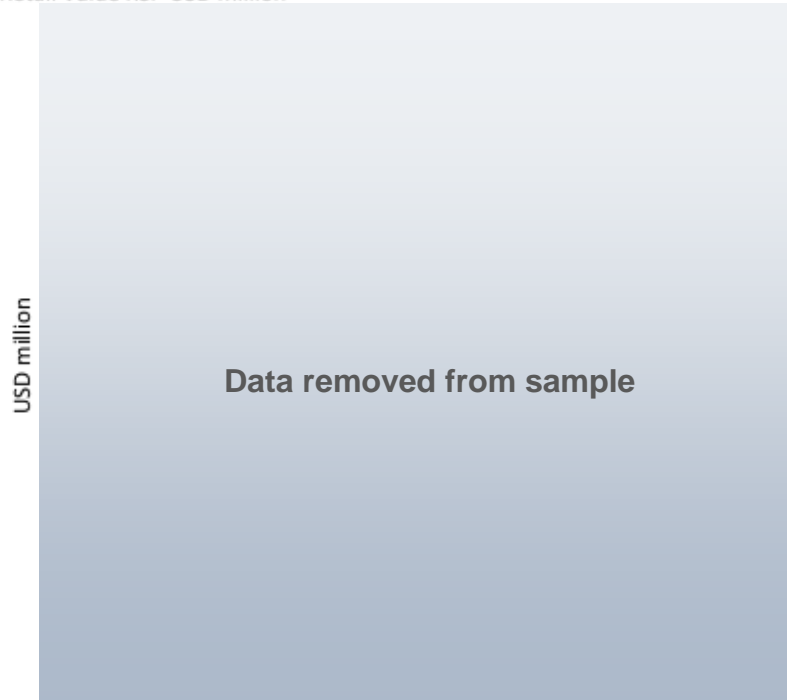


Eastern Europe

Regional snapshot: Middle East and Africa

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

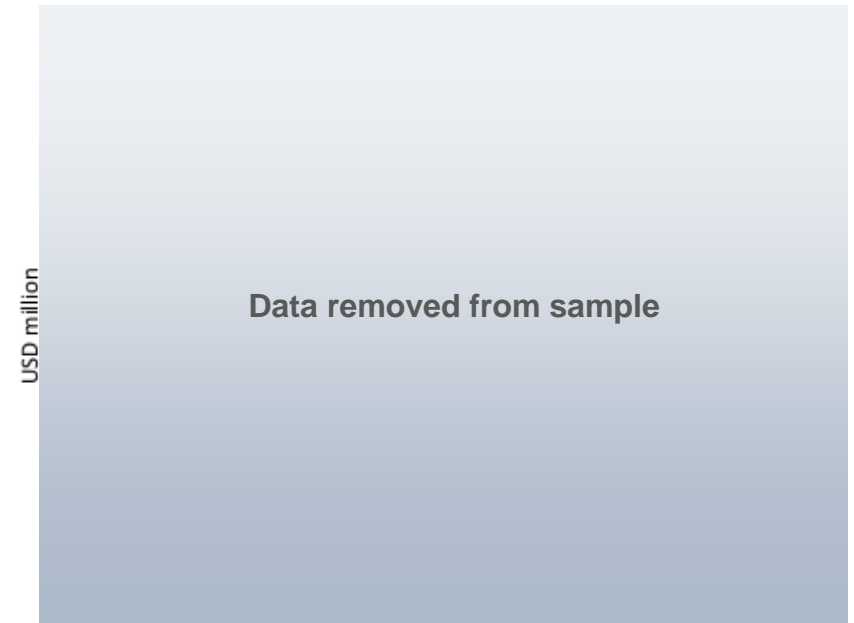
Retail Value RSP USD million



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

Middle East and Africa: Absolute Growth by Category

Retail Value RSP USD million

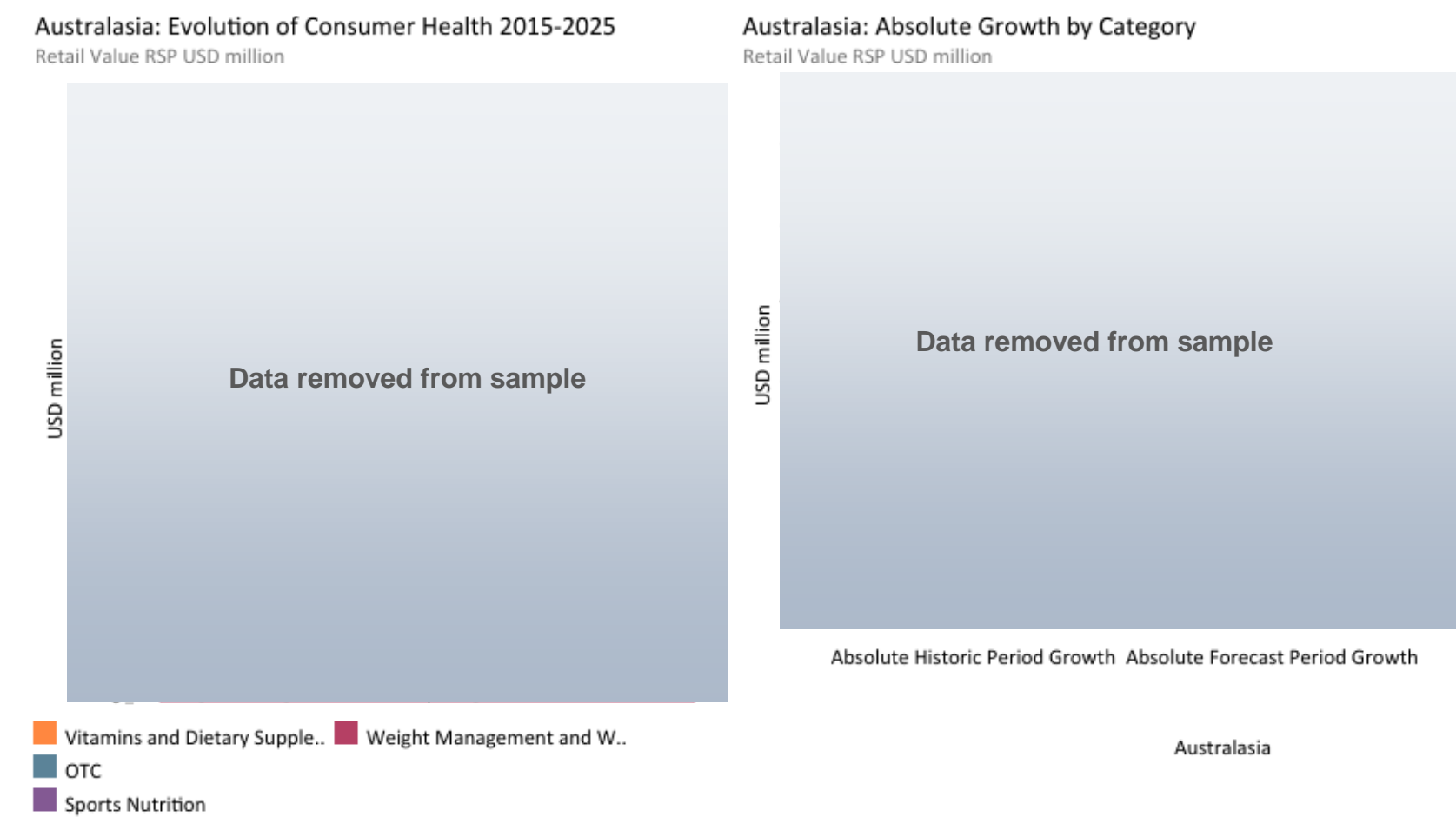


Absolute Historic Period Growth

Absolute Forecast Period
Growth

Middle East and Africa

Regional snapshot: Australasia



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