Introduction

Global Outlook

Leading Companies and Brands

Key Trends for Consumer Health During Coronavirus

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

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

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Key trends shaping consumer health

<table>
<thead>
<tr>
<th>Trend</th>
<th>Expected long-term implications</th>
<th>Historic impact</th>
<th>Forecast impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booming immunity</td>
<td>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.</td>
<td>Moderate impact</td>
<td>Strong impact</td>
</tr>
<tr>
<td>Rising interest in general health</td>
<td>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.</td>
<td>Low impact</td>
<td>Moderate impact</td>
</tr>
<tr>
<td>Digital health's moment</td>
<td>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.</td>
<td>Low impact</td>
<td>Strong impact</td>
</tr>
<tr>
<td>Further blurring category lines</td>
<td>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.</td>
<td>Moderate impact</td>
<td>Strong impact</td>
</tr>
<tr>
<td>The rise of mental health</td>
<td>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.</td>
<td>Low impact</td>
<td>Strong impact</td>
</tr>
</tbody>
</table>
COVID-19’s impact on consumer health

Immunity demand set for strong near-term performance

Limited movement and lockdowns suppress sales for many categories

Leapfrogging into e-commerce

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Introduction

Global Outlook

Leading Companies and Brands

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Market Snapshots
GLOBAL OUTLOOK

Consumer health in context

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

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Global consumer health sees slight softening of growth in 2020
Effects of COVID-19 are starkly different among categories

Consumer Health by Category: Retail Value RSP 2015-2025
Retail Value RSP USD million

OTC  Vitamins and Dietary Supplements  Sports Nutrition  Weight Management and Wellbeing

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

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
How to evaluate the global outlook for OTC drugs
GLOBAL OUTLOOK

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

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

GLOBAL OUTLOOK

Growth in Immunity and Other VDS, 2020

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USD million, RSP, 2020

% y-o-y growth, 2020

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

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
GLOBAL OUTLOOK

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

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

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

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- 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)
Introduction
Global Outlook
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

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Performance in 2020 among leaders depends on COVID-19 compatibility

LEADING COMPANIES AND BRANDS

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

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LEADING COMPANIES AND BRANDS

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

Sales of Top 10 Consumer Health Companies by Category 2020

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USD million
- OTC
- Vitamins and Dietary Supplements
- 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

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Company Sales

Historic CAGR

Company Sales in Current Year

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## Market fragmentation: OTC products

### Top OTC Companies Retail Value Share 2020

<table>
<thead>
<tr>
<th>Company (GBO)</th>
<th>% share</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

### Top OTC Brands Retail Value Share 2020

<table>
<thead>
<tr>
<th>Brand</th>
<th>Company (GBO)</th>
<th>% share</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>
Market fragmentation: vitamins and dietary supplements

Top VDS Companies Retail Value Shares 2020

<table>
<thead>
<tr>
<th>Company (GBO)</th>
<th>% share</th>
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Top VDS Brands Retail Value Share 2020

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<th>Brand</th>
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<th>% share</th>
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</tbody>
</table>
### Market fragmentation: sports nutrition

#### Top Sports Nutrition Companies Retail Value Share 2020

<table>
<thead>
<tr>
<th>Company (GBO)</th>
<th>% share</th>
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</table>

#### Top Sports Nutrition Brands Retail Value Share 2020

<table>
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<tr>
<th>Brand</th>
<th>Company (GBO)</th>
<th>% share</th>
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</table>
LEADING COMPANIES AND BRANDS

Market fragmentation: weight management and wellbeing

Top WMW Companies Retail Value Share 2020

<table>
<thead>
<tr>
<th>Company (GBO)</th>
<th>% value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data removed from sample</td>
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</tbody>
</table>

Top WMW Brands Retail Value Share 2020

<table>
<thead>
<tr>
<th>Brand</th>
<th>Company (GBO)</th>
<th>% value</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>
Introduction

Global Outlook

Leading Companies and Brands

Key Trends for Consumer Health During Coronavirus

Market Snapshots
COVID-19 has broken industry consensus on future growth

Expected Growth in Sales Over Time Due to COVID-19

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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
The ongoing uncertainty with COVID-19 has led Euromonitor to build 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.

<table>
<thead>
<tr>
<th>Pre-C19 Forecast</th>
<th>New Baseline</th>
<th>C19 Pessimistic 1</th>
<th>C19 Pessimistic 2</th>
<th>C19 Pessimistic 3</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
</tbody>
</table>

**KEY TRENDS FOR CONSUMER HEALTH DURING CORONAVIRUS**
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**

- Increased focus on lifestyle conditions (e.g., energy, sleep, anxiety/stress, cognition, etc.)
- Digital engagement and social media
- Digital health devices
- Ethical products and brands
- Personalised products
- Natural alternatives to traditional products in your industry
- Blurring lines between health and nutritional products
- Rise of private label and competition around low price/discounts

[Data removed from sample]

Very or Extremely Influential during the COVID-19 pandemic

Very or Extremely Influential after the COVID-19 pandemic

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

Data removed from sample

Share of respondents

<table>
<thead>
<tr>
<th>Permanent change</th>
<th>Mid-term change, but will change only (Q1 and Q2 2020)</th>
<th>Short-term change, but will eventually return to pre-crisis norms</th>
<th>No change</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jul-20</td>
<td>Apr-20</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Euromonitor International Voice of the Industry: COVID-19 survey, April and July 2020, n=2,922 (April), n=1,448 (July)
KEY TRENDS FOR CONSUMER HEALTH DURING CORONAVIRUS

Near-term innovation in immunity likely

What are Immunity Seekers Taking?

- Vitamin C
- Multivitamins
- Vitamin D
- Vitamin B
- Omegas
- Vitamin E
- Probiotics
- Fish oil
- Iron
- Calcium
- Protein
- Turmeric
- Ginseng
- Green tea extract
- Royal Jelly
- Collagen
- Eye health supplement
- Ginkgo Biloba
- Glucosamine
- Mushroom extract
- Other
- CBD

Data removed from sample

Share of global respondents

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**

<table>
<thead>
<tr>
<th>Mode</th>
<th>Share of global respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal car</td>
<td></td>
</tr>
<tr>
<td>Public transportation</td>
<td></td>
</tr>
<tr>
<td>Walk</td>
<td></td>
</tr>
<tr>
<td>Ride in a friend or family member’s car</td>
<td></td>
</tr>
<tr>
<td>Take a taxi</td>
<td></td>
</tr>
<tr>
<td>Use a ride-hailing service</td>
<td></td>
</tr>
<tr>
<td>Motorcycle/moped</td>
<td></td>
</tr>
<tr>
<td>Bicycle</td>
<td></td>
</tr>
<tr>
<td>Use a ride-sharing service</td>
<td></td>
</tr>
<tr>
<td>None of the above</td>
<td></td>
</tr>
<tr>
<td>Private shuttle</td>
<td></td>
</tr>
<tr>
<td>Use a car-sharing service</td>
<td></td>
</tr>
<tr>
<td>Electric bicycle (e-bike)</td>
<td></td>
</tr>
<tr>
<td>Electric scooter</td>
<td></td>
</tr>
</tbody>
</table>

*Source: Euromonitor International Mobility Survey 2020, n=30,438*
Consumer health rebound tied to trajectory of COVID-19

“Do you commute to work or school?”
Responses by select countries

- Brazil
- China
- France
- Germany
- India
- Italy
- Mexico
- Russia
- South Korea
- United Kingdom
- USA

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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

- Digital engagement and social media
- Increased focus on lifestyle conditions
- Digital health devices
- Personalised products
- Rise of private label and competition around low price/discounts
- Blurring lines between health and nutritional products in food/bev
- Ethical products and brands
- Natural alternatives to traditional products in your industry

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

“How do you think the increase of online shopping will change as a result of the COVID-19 pandemic?”

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

Global Outlook

Leading Companies and Brands

Key Trends for Consumer Health During Coronavirus

Market Snapshots
MARKET SNAPSHOT

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

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Absolute Historic Period Growth
Absolute Forecast Period Growth

OTC

Asia Pacific
Eastern Europe
Middle East and Africa
Western Europe
Australasia
Latin America
North America
Global snapshot of vitamins and dietary supplements
Global snapshot of sports nutrition
Global snapshot of weight management and wellbeing
Regional snapshot: Asia Pacific

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

Data removed from sample

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

Absolute Historic Period Growth
Absolute Forecast Period Growth

Data removed from sample
Regional snapshot: North America

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

Data removed from sample

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

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

Absolute Historic Period Growth
Absolute Forecast Period Growth

North America
Regional snapshot: Latin America

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

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

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Data removed from sample

OTC
Sports Nutrition
Vitamins and Dietary Supply
Weight Management and W.
Regional snapshot: Western Europe

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

Data removed from sample

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

Data removed from sample

Western Europe

Absolute Historic Period Growth
Absolute Forecast Period Growth

OTC
Weight Management and Weight Loss
Vitamins and Dietary Supplements
Sports Nutrition
Regional snapshot: Eastern Europe

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

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

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**Absolute Historic Period Growth**

**Absolute Forecast Period Growth**

Eastern Europe
Regional snapshot: Middle East and Africa

Middle East and Africa: Evolution of Consumer Health
2015-2025
Retail Value RSP USD million

Middle East and Africa: Absolute Growth by Category
Retail Value RSP USD million

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Data removed from sample

Absolute Historic Period Growth
Absolute Forecast Period Growth

Middle East and Africa

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CONSUMER HEALTH: WORLD MARKET

PASSPORT  52
Regional snapshot: Australasia

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

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

Australasia: Absolute Growth by Category
Retail Value RSP USD million

Data removed from sample

Absolute Historic Period Growth  Absolute Forecast Period Growth

Australasia
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Executive debate on the global trends changing the consumer markets of the future.

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The competitive positioning and strategic direction of leading companies including uniquely sector-specific sales and share data.

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The key drivers influencing the industry in each country; comprehensive coverage of supply-side and demand trends and how they shape future outlook.