

VMS across the Globe

In-depth view of the World's OTC VMS Markets



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An in-depth view of the World's OTC VMS Markets

The report features the most up-to-date OTC sales data anywhere!

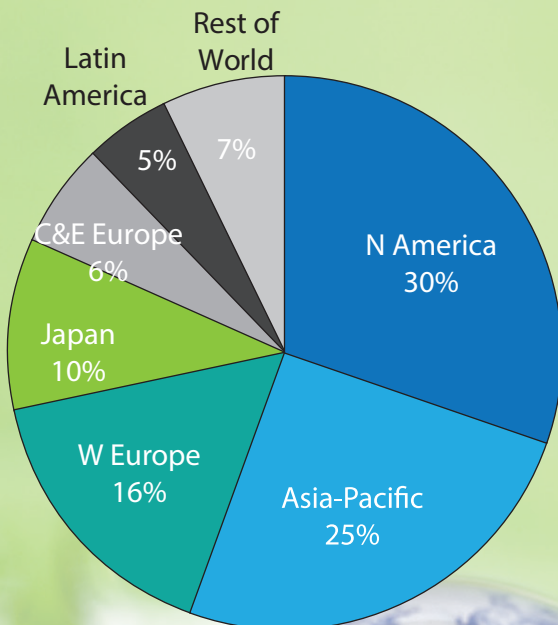
Freshly-published data from Nicholas Hall's **DB6** Global OTC Sales Database includes mid-year 2013 OTC sales, from category topline down to brand level.



Nicholas Hall's
DB6 Global OTC Database

Taking around 30% of global OTC sales, **Vitamins, Minerals & Supplements** is the largest and most significant category in the OTC industry. Sales of \$36bn in 2012 marked a solid 3.4% increase on the previous year, but a slowdown on the growth rates of previous years. Some categories proved exceptionally dynamic (including certain single vitamins and herbals & naturals) while others disappointed. Regions like C&E Europe and Latin America forged ahead, while the large North American market saw only pockets of dynamism amidst a general slowdown. Western Europe posted declining VMS sales in 2012, and Japan continued to suffer.

GLOBAL VMS SALES BY REGION 2012



The 18 countries profiled in this report account for **83%** of global VMS sales. By looking in detail at what drives these markets (from regulatory changes to consumer preferences, innovative launches to new scientific studies) or holds them back (from regulatory obstacles to oversaturation, reimbursement to lack of A+P support), this report will paint a detailed picture of the current landscape and highlight opportunities and threats.

Forecasts show that the global market will be worth **\$44.6bn by 2017**, averaging growth of **4.4%**.

This report '*VMS across the Globe: An in-depth view of the World's OTC VMS Markets*' will provide answers to the following questions, and many more:

- Why are fish oils flourishing in some markets but floundering in others?
- What's behind the soaraway growth in single vitamins in Brazil?
- What's at the heart of Elevit's success in China?
- Which countries offer the best opportunities for future growth?
- What will be the impact of the recent spate of M&A activity in VMS?

Keep ahead of competition with our comprehensive report '*VMS across the Globe: An in-depth View of the World's OTC VMS markets*'.

Nicholas Hall
Chairman & CEO, Group of Companies

Ian Crook
Managing Editor, Nicholas Hall Reports

18 COUNTRIES PROFILED



CATEGORIES COVERED

- Multivitamins
- Single vitamins
- Minerals (incl. calcium, iron, zinc, etc.)
- Hair & beauty supplements
- Herbal & natural supplements (incl. fish oils, ginseng, CoQ10, etc.)
- Herbal memory & brain health

- Herbal & natural joint health
- Herbal & natural immune stimulants
- Herbal menopause supplements
- Probiotics
- Tonics & cure alls
- OTC tonic drinks
- Chyawanprash

(NB not all categories are featured in all countries profiled)

CONTENTS

- **GLOBAL VMS OVERVIEW** Including consumer trends and a region by region breakdown
- **LEADING VMS MARKETS** Featuring key trends, individual category analysis, regulatory developments, success factors behind leading segments and brands, and forecasts for the future
- **VMS SPECIALISTS** Profiling some of the leading companies specialising in VMS globally, including sales breakdown, marketing strategies and NPD
- **BRAND CASE STUDIES** Looking at some of the most impressive VMS brands of recent years and the factors behind their success (including profiles of Culturelle, D-Cal, Elevit, MegaRed and Theraflex, among others)
- **VMS REGULATION** Detailing the most significant regulatory changes in key markets, as industry bodies worldwide respond to the growing demand for supplements
- **IMPACT OF SCIENTIFIC STUDIES ON VMS SALES** Highlighting how scientific studies affect consumer perceptions of key supplements and the impact this has on sales
- **PROSPECTS FOR VMS** Predicting the future prospects for the global VMS industry and opportunities & threats in individual markets, including sales forecasts to 2017 and 2022

NB: Nicholas Hall & Company reserves the right to make changes to the content of this report

Nicholas Hall & Company offers the world's most complete OTC marketing & business solutions

Dedicated to benchmarking consumer healthcare markets and providing business solutions, we are specialists in OTC, with an international network of contacts, offering data & analysis, strategic advice and competitive intelligence on a global, regional or local basis.

Other Nicholas Hall Reports:



Successful OTC Brands:

12 Case studies with a Focus on A+P strategy
Each case study includes the latest year-end 2012 sales data, examination of key markets, an overview of innovations & NPDP, and detailed analysis of individual A+P campaigns.

Publish Date: July 2013



M&A in OTC: Acquisition Targets and Success Strategies

The report identifies 100 leading M&A targets, each with its own profile, featuring OTC sales 2008-12, top brands and key strengths, along with Nicholas Hall's expert appraisal.

Publish Date: July 2013



Asia Market Guides: OTC Markets in Asia under the Spotlight

This report is an invaluable go-to resource for anyone who wants to know the ins & outs of the key Asian OTC markets, from regulatory developments to OTC category insights.

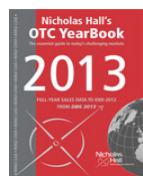
Publish Date: May 2013



Sexual Health & Fertility: OTC Trends & Developments

This report on sexual health and fertility, a vibrant area of the healthcare field, covers a number of OTC areas, from VMS to home diagnostics, and has benefited from rapid expansion and exploitation of new niches.

Publish Date: Apr 2013



Nicholas Hall's OTC YearBook 2013

This unique reference book contains comprehensive market data through December 2012 drawn from our **DB6** global OTC sales database.

Publish Date: April 2013



Consumer Trends in Health 2013-2020: Delivering Sustainable OTC Growth via Global Consumer Insight

This guest author report includes 5 New Frontiers for Health, a deep-dive into health trends in Asia, and 4 key consumer postures for the recession.

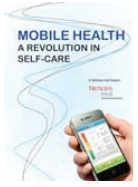
Publish Date: Feb 2013



Global OTC Analgesics Review

The global OTC Analgesics market presents a varied and challenging environment for marketers looking to discover the pockets of high growth hidden in its relatively flat overall performance.

Publish Date: Jan 2013



Mobile Health: a Revolution in Self-Care

Smartphones are an increasingly intrinsic part of consumers lives, and mobile health is becoming a vibrant area of healthcare. It represents a new tool in the established areas of health monitoring – a key aspect of mHealth – and consumer engagement.

Publish Date: Dec 2012



Global OTC Cough, Cold & Allergy Review

This comprehensive report scrutinises the CCA market from a global level down to individual countries, strategically analysing the trends and developments affecting brands, consumers and marketers.

Publish Date: Oct 2012



Pharmacy Point-of-Care: Unlocking a Key Part of the OTC New Paradigm

"The branded OTC industry cannot defend itself from generic competition by matching its prices, but by adding value in the form of advice at Point-of-Care" – Nicholas Hall, September 2012

Publish Date: Oct 2012

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