



Global Nutrition Supplements Market

2014

Executive Summary

A dietary supplement, also termed as food supplement or nutrition supplement, is a concoction of several vitamins, minerals, fiber, fatty acids, amino acids and other trace elements, meant for supplementing the diet and supplying nutrients that may be absent in a person's diet or may not be consumed in sufficient quantities. Nutrition supplements can be consumed in form of pill, capsule, tablet, or liquid form. There are three primary nutrition supplement requirements: Lifestyle, Preventive and Proactive, and Clinical. Wellbeing, vitality, beauty and energy together compose lifestyle requirement; infant nutrition, age related, weight management form preventive and proactive requirement while clinical requirements are composed of medical food, nutrigenomics, etc. However, numerous supplements have active ingredients that impose strong biological effects in the body. The respective property could render them potentially hazardous in various situations and hurt or complicate one's health.

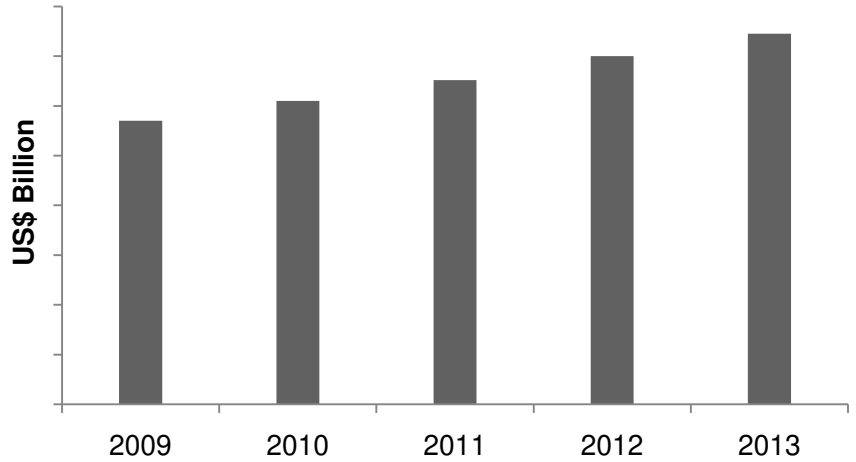
Dietary supplements have been broadly segmented into six product types: Vitamins, Herbs and Botanical, Sports Nutrition, Minerals, Meal Replacements and others. Each of the product categories has its own significance for the human body and deficiency of any these essential products can lead to diseases and disorders. Vitamins are organic substances vital for the body and are required for maintenance and proper functioning of every organ in the body. There are 60 minerals found in the body, 22 of which are considered essential for good health. Products falling under sports nutrition category include tablets, powders, nutrition bars and drinks formulated to enhance physical activity. Other products encompass glucosamine, melatonin, probiotics, docosahexanoic acid (DHA), fish oils and shark cartilage, coenzyme Q10 (Co-Q10), amino acids and homeopathic remedies.

The key factors driving growth of the global nutrition supplement industry include ameliorating economic conditions, accelerating aging population, rising urban population, increasing life expectancy rate, and escalating number of vitamin tests. Some of the noteworthy trends and developments of this industry include growing prevalence of dietary supplements, increasing demand for liquid dietary supplements, rising focus on infant nutrition and focus on novel nutrition ingredients. The intense competition prevailing among various small and large scale players in the global nutrition supplement industry has been studied on the basis of its product segments.

The global and region wise analysis of the nutrition supplement industry along with a study of the global nutrition market is presented in this report. The nutrition supplement market has been studied on regional level covering three major nutrition supplement segments: vitamin, sports nutrition and minerals. In addition to this, next five year forecast of nutrition supplement industry for each region has been incorporated in the report. The report offers a detailed analysis of the global and regional nutrition supplement industry along with company profiles and business strategies of major nutrition supplement market players, i.e. Atrium innovation Inc, Glanbia Plc, NBTY Inc, and Herbalife Ltd, operating in the global marketplace.

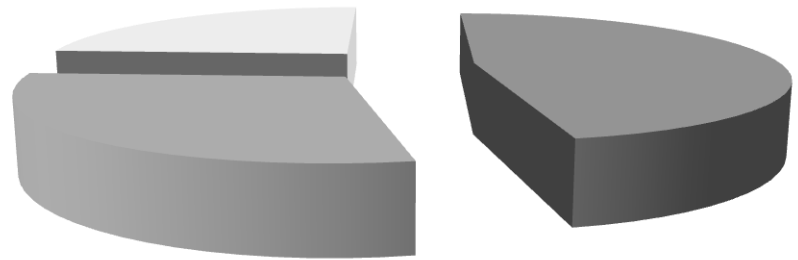
The nutrition industry comprises of dietary supplements, natural & organic food and beverages, functional foods and beverages and infant nutrition products.

Global Nutrition Industry (2009-2013)



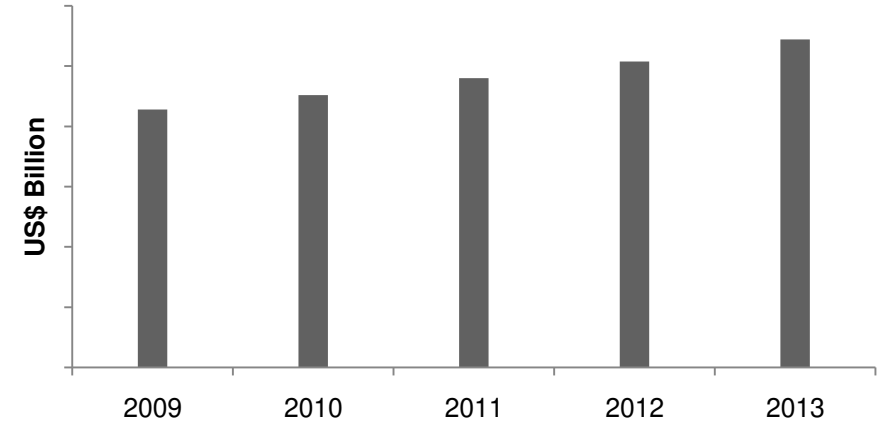
- The global nutrition industry marked an incline of% to reach US\$.... billion at the end of 2013, compared to US\$..... billion in the previous year. From US\$..... billion in 2009 to US\$..... billion in 2013, the growth of the global nutrition industry was reported at a CAGR of%.
- Out of the total revenue generated by the global nutrition industry during 2013, food and beverages represented highest share of% whilst nutrition supplements and infant nutrition pictured respective shares of% and%. It is anticipated that the shares of dietary supplements will witness an increase in the near future majorly on the back of rising focus on nutrition value.
- Global nutrition supplement market increased from US\$.... billion in 2012 to US\$.... billion in 2013 thus marking an incline of ...%. The growth of the industry was primarily driven by expanding global urban middle class population opting and adapting western lifestyles and diets.

Percentage Share of Segments in Global Nutrition Industry (2013)



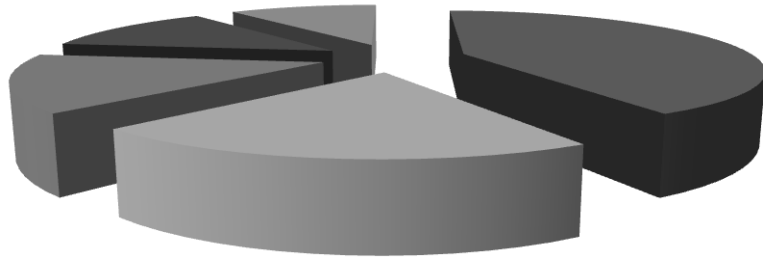
Food & Beverages Nutrition Supplements Infant Nutrition

Global Nutrition Supplement Industry (2009-2013)



The nutrition supplement industry has been broadly classified into six segments: Vitamins, Sports Nutrition, Minerals, Herbs and Botanical, Meal Replacements, and Others.

Percentage Share of Nutrition Supplement Products (2013)



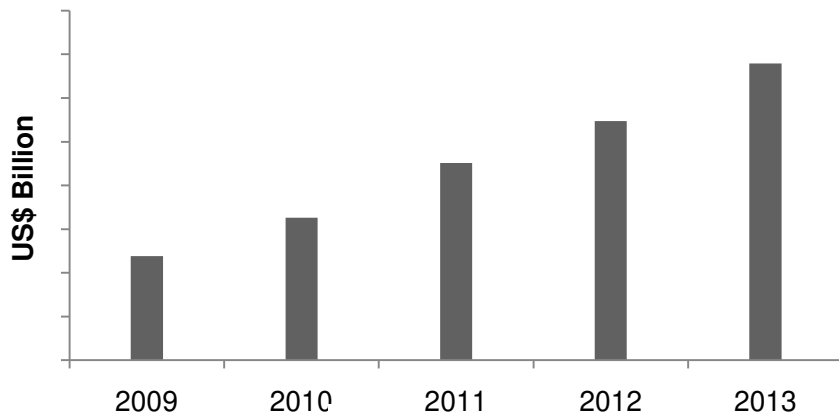
Vitamins
Minerals
Herbs & Botanical
Meal Replacements
Sports Nutritions

- In 2013, the global nutrition supplement market was fiercely dominated by Vitamins products with ...% of the revenues being generated by this category. Herbs and botanicals and sports nutrition respectively represented shares equivalent to% and

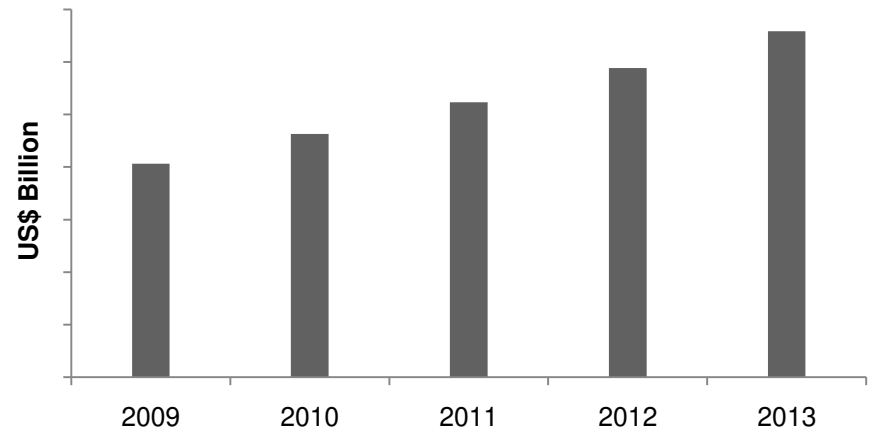
- The global vitamin market has been continuously growing over the past couple of years and the same trend is expected to be noted in the near future. The sales of vitamins grew by ...% to reach US\$.... billion at the end of 2013, compared to US\$..... billion during the prior year.

- Registering an incline of, the total revenue for 2013 increased to US\$..... billion, compared to US\$..... billion in the previous year. The incline in the sports nutrition industry can be attributed to rising urban population adapting modern lifestyle and diets. The growth of the market was observed at a remarkable CAGR of

Global Vitamin Market (2009-2013)

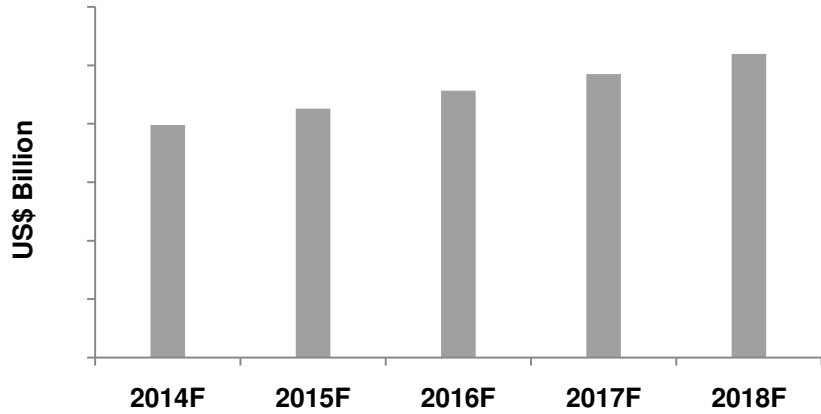


Global Sports Nutrition Market (2009-2013)

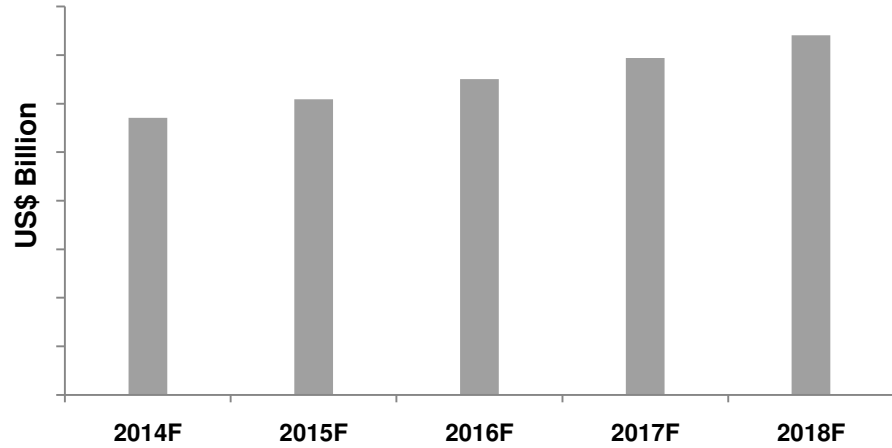


Increasing brand exposure among customers across all countries has created the need to offer novel and advanced products with competitive price enabling organization to expand their customer base.

Global Nutrition Industry Forecast (2014F-2018F)



Global Nutrition Supplement Market Forecast (2014F-2018F)



- The nutrition industry is projected to be worth US\$.... billion by the end of 2014, up by%, compared to US\$..... billion in 2013. The rise will chiefly be driven by accelerating aging population, rising health concerns and ameliorating economic conditions that enhance the healthcare spending capabilities of an individual. Further, the market is anticipated to grow at a CAGR of% from US\$..... billion by the end of 2014 to US\$..... billion by the end of 2018..
- The global nutrition supplement industry is forecasted to grow at a CAGR of% to reach US\$..... billion by the end of 2018 from US\$..... billion in 2013. The anticipated increase in the global industry will be recorded due to increasing shift from treatment to prevention along with health trend continuing to move from reactive to proactive formats. Further, the same is expected to reach US\$..... billion by the end of 2014. Food quality, ingredient authenticity and traceability concerns will encourage the growth of the industry in the near future.
- It has been observed that a handful of companies operating in the food and pharmaceutical industry are trying to penetrate the nutritional supplement industry thereby increasing the intensity of competition among the major market players. A number of vitamin and nutritional supplement players are expediting the presence of their products by marketing them through wide range of channels such as retailers, mass merchandisers, drug store chains, independent drug stores, specialty retailers of nutritional products, supermarkets and health food and specialized stores.

Note: Market attractiveness is inverse of penetration. Low penetration means high attractiveness and vice-versa