

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Increased NPD and investment in marketing helped return healthy growth to the vitamins and supplements market. Demographically positioned vitamins proved among the biggest successes, reflecting consumer demand for more targeted health solutions and indicating that brands could explore specific gender- and age-related claims."

Jack Duckett, Senior Consumer Lifestyles

This report looks at the following areas:

- · Exploring more specific demographic issues
- · Appealing to a wider male audience

This Report covers the following vitamins and supplements sectors:

Vitamins -

multivitamins and single-dose vitamins (ie Vitamins A, B C, D, E etc).

Minerals -

ie iron, zinc, calcium, potassium, magnesium, copper, selenium.

Dietary supplements -

includes supplements such as cod liver oil, fish oils, gamma-linolenic acids (GLAs), evening primrose oil, glucosamine and herbs such as garlic, ginseng and ginger.

These products have GSL (General Sales List) status, ie they are available on open sale in all types of outlets including grocers, pharmacies and drugstores.

Unless a medicinal claim is made for the products, vitamins and supplements are not classified as medicines and, therefore, are not subject to the Medicines Act 1968 or the Medicines for Human Use Regulations 1994. They are, however, controlled by the Food Safety Act 1990, and therefore have to be fit for human consumption.

Excluded

Miscellaneous products claiming to be 'vitamin-enriched' or 'performance-enhancing' (ie protein shakes designed to help build muscle).

Homeopathic and herbal remedies (for more details please see Mintel's *Complementary and Alternative Medicine – UK, December 2015* Report).

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

+61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Products covered in this report

Executive Summary

Steady growth projected for vitamins and supplements category

Figure 1: Best- and worst-case forecast of UK value sales of vitamins and supplements, 2011-21

Product launch activity soars

Figure 2: New launches in the UK vitamins and supplements market, by launch type, January 2013-June 2016

Consumers shift to daily usage

Figure 3: Usage of vitamins and supplements in the last 12 months, vs the previous 12 months, June 2015 and June 2016

Persuading men they need vitamins

Figure 4: Barriers to using vitamins and supplements, June 2016

Women more likely to experience vitamin deficiencies

Figure 5: Factors encouraging people to start using vitamins and supplements, June 2016

Professional advice drives trust in supplements

Figure 6: Factors encouraging trust in the vitamins and supplements market, June 2016

What we think

Issues and Insights

Exploring more specific demographic issues

The facts

The implications

Appealing to a wider male audience

The facts

The implications

The Market – What You Need to Know

Vitamins and supplements market returns to growth

Consumer demand for customised products grows

Healthy living trend drives sales for health food retailers

Targeting the ageing population

Debate over value of pregnancy vitamins

Vitamins in the media

Market Size and Forecast

Vitamins and supplements market enjoys buoyant sales

Figure 7: UK retail value sales of vitamins and supplements, at current and constant prices, 2011-21

Steady growth projected for vitamins and supplements category

Figure 8: Best- and worst-case forecast of UK value sales of vitamins and supplements, 2011-21

BUY THIS REPORT NOW VISIT: store.mintel.con

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

APAC +61 (0) 2 8284 8100 | EMAIL: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The impact of the EU referendum vote

Figure 9: Alternative market scenarios for the post-Brexit vitamins and supplements market, at current prices, 2016-21

Figure 10: Detailed post-Brexit scenarios for the vitamins and supplements market, at current prices, 2016-21

Vitamins and supplements: A recession-proof market?

Segment Performance

Demographically positioned vitamins drive category sales

Figure 11: UK retail value sales of vitamins and supplements, by segment, years ending May 2015 and 2016

Sales of men's vitamins on the rise

Opportunities for pro-pregnancy vitamins

Channels to Market

Healthy living trend drives sales for health food retailers

Figure 12: UK retail value sales of vitamins and supplements, by outlet type, 2014 and 2015

Further growth through discounter channels

Market Drivers

Targeting the ageing population

Figure 13: Trends in the age structure of the UK population, 2011-21

Tapping into the growing male population

Figure 14: Trends in the age structure of the UK population, by gender, 2011-16 and 2016-21

Baby boom slows

Figure 15: Trends in the number of live births, England and Wales, 2004-14

Debate over value of pregnancy vitamins

Vegetarianism and vegan trend

Figure 16: Mintel food tracker - Proportion of population who identify as vegetarian, August 2013-August 2015

Tapping into exercise habits

Figure 17: Participation in in-home and individual fitness activities, December 2014

Vitamins in the media

Research boost for fish oil and Omega-3 supplements

Health bodies advise Vitamin D for all

Figure 18: Screengrab from Google News, with search terms "Vitamin D", August 2016

Concerns over iron tablets

Key Players – What You Need to Know

VMS market remains fragmented

Product launch activity and advertising soar

Powders increase share of launch activity

Brands go after children and babies market

Tapping into the physique boom

Vitabiotics invests in celebrity endorsement

Market Share



VISIT: store.mintel.con

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

APAC +61 (0) 2 8284 8100 | EMAIL: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

VMS market remains fragmented

Figure 19: Retail value sales of vitamins and supplements, by brand, years ending June 2015 and 2016

Vitabiotics gains market share

Launch Activity and Innovation

Product launch activity soars

Figure 20: New launches in the UK vitamins and supplements market, by launch type, January 2013-June 2016

Powders grow share of launch activity

- Figure 21: New launches in the UK vitamins and supplements market, by format type, January 2013-June 2016
- Figure 22: Examples of launches of powder-based vitamins and supplements, July 2015-June 2016

Other alternative formats

Figure 23: Reserol Boosting Films, Sweden, July 2016

Own-label vs branded

- Figure 24: New launches in the UK vitamins and supplements market, own-label vs branded, January 2013-June 2016
- Figure 25: Own-label vs branded launches, by format type, 2015
- Figure 26: Examples of non-tablet/capsule format own-label vitamin and supplement product launches, January 2015-16

Fragmented launch activity by company

Figure 27: New launches in the UK vitamins and supplements market, by ultimate company, January 2013-June 2016

Launch activity underscores sales growth in targeted vitamins

Figure 28: Top 10 fastest-growing product positioning claims in the vitamins and supplements category, 2014-15

Tapping into the physique boom

Figure 29: Product launches in vitamins and supplements category carrying weight and muscle gain claims, 2015

Advertising and Marketing Activity

Adspend rises in 2016

Figure 30: Recorded above-the-line, online display and direct mail total advertising expenditure on vitamins and supplements, by media type, January 2013-June 2016

Healthspan leads advertising expenditure in 2015

Figure 31: Recorded above-the-line, online display and direct mail total advertising expenditure on vitamins and supplements, by top 10 advertisers and other, January 2013-June 2016

Vitabiotics invests in celebrity endorsement

Figure 32: Vitabiotics Wellman campaign featuring David Gandy, June 2016

Nielsen Ad Intel coverage

The Consumer – What You Need to Know

Consumer shift towards daily usage

Multivitamins dominate category

Persuading men they need vitamins

Tapping into diets

Vitamins users exhibit proactive approach towards health

Weight loss vitamins register low levels of trust

Professional and scientific opinion drive trust

Bolstering trust in oral sprays



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

APAC +61 (0) 2 8284 8100



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Usage and Frequency of Vitamins and Supplements

Consumer shift towards daily usage

Figure 33: Usage of vitamins and supplements in the last 12 months, vs the previous 12 months, June 2015 and June 2016

Upturn in male usage of vitamins and supplements

Figure 34: Changes in daily usage of vitamins and supplements over the last two years, by gender, June 2015 and June 2016

Multivitamins dominate category

Figure 35: Vitamins taken in the last 12 months, by frequency, June 2016

Bringing mineral supplements to a younger audience

Figure 36: Supplements taken in the last 12 months, by frequency, June 2016

Usage of Vitamin D supplements increases

Figure 37: Percentage point change in the proportion of adults using vitamins and supplements in the last 12 months, 2015-16

Barriers to Using Vitamins and Supplements

Persuading men they need vitamins

Figure 38: Barriers to using vitamins and supplements, June 2016

Tapping into diets

Figure 39: Attitudes towards healthy eating, by age, August 2015

A quarter of non-users put off by price

Figure 40: Image of vitamin section from Tesco store in London, July 2016

Usage Motivations

Vitamins users exhibit proactive approach towards health

Figure 41: Factors encouraging people to start using vitamins and supplements, June 2016

Women more likely to experience vitamin deficiencies

Figure 42: Selected factors encouraging people to start using vitamins and supplements, by gender, June 2016

Young adults turn to vitamins to correct poor diet

Figure 43: Selected factors behind why people started using vitamins and supplements, by age and gender, June 2016

Figure 44: Myprotein Body Coach Recommendations, July 2016

Trust in Vitamins and Supplements

Musculoskeletal health vitamins enjoy high levels of trust

Figure 45: Trust in common vitamins' and supplements' health claims, June 2016

Trust highest amongst women

Figure 46: Proportion of adults who indicate trust in the following vitamins' and supplements' health claims, by gender, June 2016

Weight loss vitamins register low levels of trust

Professional and scientific opinion drive trust

Figure 47: Factors encouraging trust in the vitamins and supplements market, June 2016

Well-known brands register with young adults

Figure 48: Proportion of adults who would trust vitamin/supplement based on it being made by a well-known brand, by age, June 2016

Perceptions of Vitamin and Supplement Formats

Convenience drives popularity of tablets and capsules



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

APAC +61 (0) 2 8284 8100



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 49: Perceptions of vitamin and supplement formats, June 2016

Figure 50: Perceptions of different formats for vitamins and supplements, June 2016

Bolstering trust in oral sprays

Figure 51: Examples of Better You oral spray products, July 2016

Gummies boast child-friendly image

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Forecast methodology

Correspondence analysis

Appendix – Key Players

Figure 52: Recorded above-the-line, online display and direct mail total advertising expenditure on vitamins and supplements, January 2013-June 2016

Appendix - The Consumer

Figure 53: New launches in the UK vitamins and supplements market designed for children aged 5-12 years old, by format type, January 2013-June 2016

APAC +61 (0) 2 8284 8100 EMAIL: reports@mintel.com