

Homeopathic and Herbal Remedies - US - March 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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



"Though sales of homeopathic and herbal remedies continue to increase, the market is up against several challenges. This includes low awareness among consumers, limited product availability, and consumer perception of safety and efficacy."

– Emily Krol, Health and Wellness Analyst

In this report we answer the key questions:

- Product awareness and usage is low compared to conventional OTC remedies. How can brands increase awareness and usage of homeopathic and herbal remedies?
- How can brands in the homeopathic/herbal market communicate product efficacy to consumers?
- How does regulation of homeopathic/herbal remedies affect consumer perception of safety?

The market for homeopathic and herbal remedies continues to grow, and is estimated to increase 2.6% from 2011-12. Due to increased healthcare costs and lack of insurance, more consumers are being proactive about their health and wellness. This, paired with the fact that consumers are using more organic and natural products, could help fuel the growth of herbal and homeopathic remedies. Furthermore, product recalls of various OTC nonprescription medications likely has consumers looking for what they perceive to be as safer alternatives.

This report will present sales data for herbal and homeopathic remedy products, with Mintel's expert analysis explaining fluctuations. Consumer usage and attitudes toward homeopathic and herbal remedies are assessed to garner marketing recommendations. Demographic differences regarding how people use homeopathic remedies is also presented. Additionally, the reader will gain an understanding of what ailments consumers use homeopathic and herbal remedies to treat. Finally, where consumers get information about remedies and interest level in alternative remedy formats is included.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

APAC
+61 (0) 2 8284 8100

EMAIL:
oxygen@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

Homeopathic and Herbal Remedies - US - March 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Table of Contents

Scope and Themes

What you need to know

Definition

Data sources

Sales data

Consumer survey data

Advertising creative

Abbreviations and terms

Abbreviations

Terms

Executive Summary

The market

Figure 1: Total U.S. sales and fan chart forecast of homeopathic and herbal remedies, at current prices, 2007-17

Figure 2: Ways treated ailments suffered, December 2012

Figure 3: Percent of consumers indicating they have used homeopathic medicines in the past year, 2005-10

Segment snapshots

Figure 4: Total U.S. retail sales of homeopathic and herbal remedies, by segment, at current prices, 2011 and 2012

Market factors

Demographics

Figure 5: U.S. population, by age, 2008-18

Figure 6: Use of homeopathic and herbal remedies to treat ailments suffered, by age, December 2012

Figure 7: Population by Hispanic origin, 2008-18 and use of homeopathic and herbal remedies to treat ailments suffered, by Hispanic origin, December 2012

Figure 8: Households, by presence of own children, 2002-12

Figure 9: Use of homeopathic and herbal remedies to treat ailments suffered, by presence of children in the household, December 2012

Healthcare costs

Retailers

Figure 10: Total U.S. retail sales of homeopathic and herbal remedies, by channel, at current prices, 2012

The consumer

Information about homeopathic and herbal remedies

Figure 11: Homeopathic/Herbal remedy information sources, by gender and age, December 2012

Interest in remedy formats

Figure 12: Interest in remedy formats, December 2012

Attitudes toward homeopathic and herbal remedies

Figure 13: Attitudes toward homeopathic/herbal remedies, by ways treated ailments suffered, December 2012

What we think

Issues in the Market

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Homeopathic and Herbal Remedies - US - March 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Product awareness and usage is low compared to conventional OTC remedies. How can brands increase awareness and usage of homeopathic and herbal remedies?

How can brands in the homeopathic/herbal market communicate product efficacy to consumers?

How does regulation of homeopathic/herbal remedies affect consumer perception of safety?

Insights and Opportunities

Retail locations

Mobile applications

Product formats

Trend Applications

Trend: Retired for Hire

Figure 14: VitaMelts product shot

Trend: Cool Vending

2015 Trend: East Meets West

Market Size and Forecast

Key points

Homeopathic and herbal remedies poised for growth

Sales and forecast of homeopathic and herbal products

Figure 15: Total U.S. retail sales and forecast of homeopathic and herbal remedies, at current prices, 2007-17

Figure 16: Total U.S. retail sales and forecast of homeopathic and herbal remedies, at inflation-adjusted prices, 2007-17

Fan chart forecast

Figure 17: Total U.S. sales and fan chart forecast of homeopathic and herbal remedies, at current prices, 2007-17

Market Drivers

Key points

Demographics

Age

Figure 18: Population, by age, 2008-18

Figure 19: Ailments suffered past 12 months, by age, December 2012

Ethnicity

Figure 20: Population, by race and Hispanic origin, 2008-18

Population of children

Figure 21: Households, by presence of own children, 2002-12

Healthcare costs

Product recalls

Competitive Context

Traditional OTC remedies

Figure 22: Attitudes toward remedies, among all and homeopathic/herbal remedy users, December 2012

Prescription remedies

Home remedies (i.e., tea, juice, etc.)

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Homeopathic and Herbal Remedies - US - March 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 23: Use home remedies (any agree), among all and homeopathic/herbal remedy users, December 2012

Segment Performance

Key points

Herbal remedies continue to dominate the market, but homeopathic remedies are increasing share

Sales of homeopathic and herbal remedies, by segment

Figure 24: Total U.S. retail sales of homeopathic and herbal remedies, by segment, at current prices, 2010 and 2012

Segment Performance—Herbal Remedies

Key points

Growth of herbal remedies is inconsistent

Sales and forecast of herbal remedies

Figure 25: Sales and forecast of herbal remedies, at current prices, 2007-17

Noni juice continues to be top-selling herb, while milk thistle and Psyllium saw large increases

Figure 26: Top 10 U.S. single herb & botanical supplement sales through all channels, 2010-11

Segment Performance—Homeopathic Remedies

Key points

Homeopathic remedies still growing

Sales and forecast of homeopathic remedies

Figure 27: Sales and forecast of homeopathic remedies, at current prices, 2007-17

Retail Channels

Key point

Overall sales growing, but share among retailers remains constant

Figure 28: Total U.S. retail sales of homeopathic and herbal remedies, by channel, at current prices, 2010-12

Figure 29: Natural Medicine by King Bio Ear Ringing

Figure 30: Total U.S. retail sales of homeopathic and herbal remedies, by channel, at current prices, 2007-12

Retail Channels—Natural Supermarkets Deep Dive

Key points

Sales of homeopathic and herbal remedies in natural supermarkets

Figure 31: Natural supermarket sales of homeopathic and herbal remedies, at current prices 2010-12

Figure 32: Natural supermarket sales of homeopathic and herbal remedies, at inflation-adjusted prices, 2010-12

Natural channel sales of homeopathic and herbal remedies, by segment

Figure 33: Natural supermarket sales of homeopathic and herbal remedies, by segment, 2010 and 2012

Natural channel sales of homeopathic and herbal remedies, by health conditions

Figure 34: Natural supermarket sales of homeopathic and herbal remedies, by health condition, 2010 and 2012

Leading brands

Innovations and Innovators

Claims

Figure 35: Share of healthcare products launched with botanical/herbal or homeopathic claim, 2007-12

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Homeopathic and Herbal Remedies - US - March 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Botanical/Herbal

Figure 36: Healthcare products launched with botanical/herbal claim, by top 10 subcategories, 2007-12

Figure 37: Share of branded/private label healthcare product launches with botanical/herbal claim, 2007-12

Homeopathic

Figure 38: Healthcare products launched with homeopathic claim, by top 10 subcategories, 2007-12

Figure 39: Share of branded/private label healthcare product launches with homeopathic claim, 2007-12

Children's products

Figure 40: healthcare product launches with homeopathic claim targeted to babies/children, 2007-12

Marketing Strategies

Overview of the brand landscape

Figure 41: Ways to determine how to treat ailments, by ways treated ailments suffered, December 2012

Brand analysis: Zicam

Figure 42: Brand analysis of Zicam, 2013

TV presence

Figure 43: Zicam, "Pre-Cold," 2012

Online initiatives

Social networking

Figure 44: Zicam social media analysis, 2013

Print

Figure 45: Zicam print advertisement, 2012

Brand analysis: New Chapter

Figure 46: Brand analysis of New Chapter, 2013

Video presence

Figure 47: New Chapter, "The Multi-Herb Approach to Liver Health," 2012

Online initiatives

Other

Figure 48: New Chapter Image, 2013

Social networking

Figure 49: New Chapter social media analysis, 2013

Brand analysis: Similasan

Figure 50: Brand analysis of Similasan, 2013

Video presence

Figure 51: Similasan, "Cough & Fever Relief, Ear Relief, Irritated Eye Relief Health," 2013

Online initiatives

Print

Figure 52: Similasan Print Ad, 2012

Social networking

Figure 53: Similasan social media analysis, 2013

Treating Ailments

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Homeopathic and Herbal Remedies - US - March 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Key points

Homeopathic and herbal usage

Figure 54: Ways treated ailments suffered, December 2012

Opportunity to grow usage among men

Figure 55: Use of homeopathic and herbal remedies to treat ailments suffered, by gender, December 2012

Figure 56: Vitamin/Mineral tablet, capsule or liquid usage, by gender, August 2011-August 2012

Address concerns of older consumers

Figure 57: Use of homeopathic and herbal remedies to treat ailments suffered, by age, December 2012

Parents are an ideal target for homeopathic/herbal remedies

Figure 58: Use of homeopathic and herbal remedies to treat ailments suffered, by presence of children in household, December 2012

Increase availability for lower-income households

Figure 59: Use of homeopathic and herbal remedies to treat ailments suffered, by household income, December 2012

Usage by generations

Figure 60: Use of homeopathic and herbal remedies to treat ailments suffered, by generation, December 2012

Learning How to Treat Ailments with Homeopathic and Herbal Remedies

Key points

Homeopathic and herbal remedy users know how to treat ailments

Figure 61: Ways to determine how to treat ailments and homeopathic/Herbal remedy information sources, December 2012

Women more experienced with treating ailments

Figure 62: Ways to determine how to treat ailments, by gender, December 2012

Younger users trust Dr. Internet

Figure 63: Ways to determine how to treat ailments, by age, December 2012

Figure 64: Homeopathic/Herbal remedy information sources, by gender and age, December 2012

Parents need reinforcement from a variety of sources

Figure 65: Ways to determine how to treat ailments, by presence of children in household, December 2012

Presence of children influences decision to turn to doctor

Figure 66: Homeopathic/Herbal remedy information sources, by presence of children in household, December 2012

Figure 67: Ways to determine how to treat ailments, by parental status, December 2012

Figure 68: Homeopathic/Herbal remedy information sources, by parental status, December 2012

Sample on pack to increase usage among light users

Figure 69: Ways to determine how to treat ailments, by repertoire of homeopathic & herbal remedy, December 2012

Figure 70: Ways treated ailments suffered, by repertoire of homeopathic & herbal remedy, December 2012

Interest in Remedy Formats

Key points

Homeopathic/herbal remedy users interested in less invasive formats

Figure 71: Boiron pellets screenshot

Figure 72: Interest in remedy formats, December 2012

Dissolvable products can help older consumers take remedies

Figure 73: Sleep sheets

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: oxygen@mintel.com

Homeopathic and Herbal Remedies - US - March 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 74: Interested in remedy format, by gender and age, December 2012

Give parents convenience

Figure 75: Interested in remedy format, by presence of children in household, December 2012

Attitudes Toward Homeopathic and Herbal Remedies

Key points

Brands can increase safety perception of these remedies

Figure 76: Attitudes toward homeopathic/herbal remedies, by ways treated ailments suffered, December 2012

Men trust homeopathic and herbal remedies

Figure 77: Attitudes toward homeopathic/herbal remedies, by gender, December 2012

Increase usage among older consumers with a safety message

Figure 78: Attitudes toward homeopathic/herbal remedies, by age, December 2012

Consider targeting lower household incomes

Figure 79: Attitudes toward homeopathic/herbal remedies, by household income, December 2012

Presence of children

Figure 80: Attitudes toward homeopathic/herbal remedies, by presence of children in household, December 2012

Figure 81: Attitudes toward homeopathic/herbal remedies, by gender and presence of children in household, December 2012

Spotlight on Those Who Trust Homeopathic Medications

Key point

Demographics of homeopathic medicine trusters

Figure 82: Demographic profile by trust level of homeopathic medicine, August 2011-August 2012

Ailments suffered by homeopathic trusters

Figure 83: Ailments suffered, by trust level of homeopathic medicine, August 2011-August 2012

Healthy habits of homeopathic trusters

Figure 84: Exercise habits, by trust level of homeopathic medicine, August 2011-August 2012

Figure 85: Attitudes/Opinions about diet and health, by trust level of homeopathic medicine, August 2011-August 2012

Figure 86: Attitudes/Opinions about health & medicine, by trust level of homeopathic medicine, August 2011-August 2012

Care for environment

Figure 87: Attitudes/Opinions about the environment, by trust level of homeopathic medicine, August 2011-August 2012

Race and Hispanic Origin

Key points

Hispanics heavier users of homeopathic/herbal remedies

Figure 88: Use of homeopathic and herbal remedies to treat ailments suffered, by race/Hispanic origin, December 2012

Figure 89: Repertoire of homeopathic and herbal remedies, by race/Hispanic origin, December 2012

Referrals resonate with Hispanics

Figure 90: Homeopathic/Herbal remedy information sources, by race/Hispanic origin, December 2012

Hispanics interested in a variety of formats

Figure 91: Interested in remedy format, by race/Hispanic origin, December 2012

Attitudes toward homeopathic/herbal remedies

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Homeopathic and Herbal Remedies - US - March 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 92: Attitudes toward homeopathic/herbal remedies, by race/Hispanic origin, December 2012

Attitudes toward remedies and health

Figure 93: Attitudes toward remedies, by race/Hispanic origin, December 2012

Figure 94: Agreement with attitudes toward health, by race/Hispanic origin, December 2012

Consumer Segmentation

Figure 95: Target clusters, December 2012

Cluster 1: Follow Doctor's Orders

Demographics

Characteristics

Opportunity

Cluster 2: Ailment Sufferers

Demographics

Characteristics

Opportunity

Cluster 3: Caring for Self

Demographics

Characteristics

Opportunity

Cluster characteristic tables

Figure 96: Ailments suffered past 12 months, by target clusters, December 2012

Figure 97: Use of homeopathic and herbal remedies to treat ailments suffered, by target clusters, December 2012

Figure 98: Ways to determine how to treat ailments, by target clusters, December 2012

Figure 99: Homeopathic/Herbal remedy information sources, by target clusters, December 2012

Figure 100: Attitudes toward remedies, by target clusters, December 2012

Figure 101: Remedy format used, by target clusters, December 2012

Figure 102: Interested in remedy format, by target clusters, December 2012

Figure 103: Attitudes toward homeopathic/herbal remedies, by target clusters, December 2012

Figure 104: Agreement with attitudes toward health, by target clusters, December 2012

Cluster demographics

Figure 105: Target clusters, by demographic, December 2012

Cluster methodology

Appendix – Other Useful Consumer Tables

Ailments suffered

Figure 106: Ailments suffered past 12 months, by gender and age, December 2012

Figure 107: Ailments suffered past 12 months, by household income, December 2012

Figure 108: Ailments suffered past 12 months, by presence of children in household, December 2012

Figure 109: Ailments suffered, August 2011-August 2012

Ailment treatment

Figure 110: Use of homeopathic and herbal remedies to treat ailments suffered, by gender and age, December 2012

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Homeopathic and Herbal Remedies - US - March 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Determining how to treat ailments

Figure 111: Ways to determine how to treat ailments, by gender and age, December 2012

Information sources

Figure 112: Homeopathic/Herbal remedy information sources, by household income, December 2012

Figure 113: Ways to determine how to treat ailments, by homeopathic/herbal remedy information sources, December 2012

Usage of remedy formats

Figure 114: Remedy format used, by gender and age, December 2012

Interest in remedy formats

Figure 115: Interested in remedy format, by gender, December 2012

Figure 116: Interested in remedy format, by age, December 2012

Attitudes toward homeopathic/herbal remedies

Figure 117: Attitudes toward homeopathic/herbal remedies, by gender and age, December 2012

Figure 118: Attitudes toward homeopathic/herbal remedies, by education, December 2012

Attitudes toward health

Figure 119: Agreement with attitudes toward health, by age, December 2012

Attitudes toward remedies

Figure 120: Attitudes toward remedies, by ways treated ailments suffered, December 2012

Social media usage

Figure 121: Social media usage, by trust level of homeopathic medicine, August 2011-August 2012

Figure 122: Social media usage, by age and gender, August 2011-August 2012

New product introduction claims

Figure 123: The 40 most common claims associated with healthcare launches, 2007-12

Appendix – Trade Associations

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: oxygen@mintel.com