

Report Price: £3085.18 | \$3995.00 | €3666.43

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



Sales are beginning to slow as Mintel estimates growth for the vitamins, minerals, and supplements market in 2017. Consumer struggles with trust, cost, and the shopping experience are a challenge to the category, although many still believe in the benefits of these products. To best position themselves, category players should emphasize natural qualities, transparency, and online sales to drive growth.

This report looks at the following areas:

- Category is growing, though at slower rates
- Several purchase factors are at play making purchase decisions challenging
- Trust and expense are barriers despite benefit perceptions

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

арас +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: £3085.18 | \$3995.00 | €3666.43

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 Definition **Executive Summary** The issues Category is growing, though at slower rates Figure 1: Total US sales and fan chart forecast of vitamins, minerals and supplements, at current prices, 2011-22 Several purchase factors are at play making purchase decisions challenging Figure 2: Select VMS purchase influencers, any rank (net), June 2017 Trust and expense are barriers despite benefit perceptions Figure 3: Select attitudes towards vitamins, minerals, and supplements, June 2016 The opportunities Enhance online shopping to ease consumer frustrations Figure 4: Select statements about VMS shopping experience, June 2017 Emphasize the role of VMS as part of a healthy lifestyle Figure 5: Select attitudes and opinions about health and medicine, January 2016- March 2017 and select attitudes towards vitamins, minerals, and supplements, June 2017 Widen natural and organic offerings to leverage consumer preferences Figure 6: Select VMS claims perceptions and select purchase influencers- any rank (net), June 2017 What it means The Market - What You Need to Know Market is growing, but at a slower rate All segments post gains, but below last year's growth Scientific studies and legislation impact the industry Struggles to eat healthy, high consumer confidence, and Hispanic growth bode well for VMS market **Market Size and Forecast** Slowing growth shows beginning signs of a maturing market Figure 7: Total US sales and fan chart forecast of vitamins, minerals, and supplements, at current prices, 2012-22 Figure 8: Total US retail sales and forecast of vitamins, minerals, and supplements, at current prices, 2012-22

Market Breakdown

All segments post gains but see slowed momentum

Lack of "buzz," lapsed usage hinder vitamin sales potential

Figure 9: Total US retail sales and forecast of vitamins, minerals, and supplements, by segment, at current prices, 2012-22

Minerals experience lower growth hindered by calcium

Market Perspective

New studies highlight positive impact of VMS

BUY THIS REPORT NOW



Report Price: £3085.18 | \$3995.00 | €3666.43

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

VMS over-exposures among children commands action

WIC Improvement Act could boost sales while expanding access

Market Factors

Struggles to eat healthy suggest opportunity for VMS

High consumer confidence at the start of 2017 bodes well for VMS sales Figure 10: Consumer sentiment index, January 2007-June 2017

Hispanic population growth could boost herbal supplements Figure 11: Population by race and Hispanic origin, 2012-22

Key Players – What You Need to Know

Carlyle, private label struggle while Pharmavite grows

Smaller brands, select liquid VMS, and online sales grow market

Private label, long-standing supplements and multivitamins miss the mark

Amazon Elements, new online brands poised for growth

Company and Brand Sales of Vitamins, Minerals, and Supplements

Largest manufacturer losing market share; "other" brands gaining

Successful segments help drive continued growth for Pharmavite

Cost savings not enough to drive private label purchasing

Figure 12: MULO sales of vitamins, minerals and supplements, by leading companies and brands, rolling 52 weeks 2016 and 2017

What's Working?

Smaller brands outpace average market growth

Various product attributes drive growth in liquid formats

Online VMS sales boom as users view it as easier

Figure 13: Walgreens email campaign, August 12, 2017

What's Struggling?

Private label struggles to keep pace in changing brand matrix

Long-standing multivitamin and supplement brands struggle Figure 14: MULO sales of select vitamin, mineral, and supplement brands, rolling 52 weeks 2016-17

Vitamints' sales decline suggests the novelty has worn off

Figure 15: MULO sales of Centrum Vitamints, rolling 52 weeks 2016-17

What's Next?

Amazon's Elements to become the next big brand?

Growth in self-diagnostic tests could help dispel efficacy doubt

New online brands overhaul VMS experience, poised for growth

The Consumer – What You Need to Know

More than half of adults are daily VMS users

Encourage e-commerce to ease in-store shopping frustrations

No one factor dominates purchase decisions at the shelf

BUY THIS REPORT NOW



Report Price: £3085.18 | \$3995.00 | €3666.43

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

Wide variety of product claims lessen the impact

Positive health perceptions don't always outweigh barriers

Gummies are a nice-to-have rather than must-have

Product Usage and Frequency

Most adults take a VMS and do so daily Figure 16: VMS product usage and frequency, June 2017

Occasional use is common, but may be circumvented

Remind users of health benefits to avoid lapsed usage

Adults aged 25-44 use greater variety, but lack consistency

Figure 17: VMS product usage, any current use (net), by age, June 2017

Figure 18: Any vitamin or supplement use (net), by frequency, by age, June 2017

Younger population, lower skepticism drives usage among Hispanics

Figure 19: VMS product usage, any current use (net), by Hispanic origin, June 2017

Shopping Experience

Stores should address frustrations to avoid missed sales

Purchase habits should be leveraged for greater loyalty

Online shopping a natural fit for VMS, should be emphasized Figure 20: VMS shopping experience, June 2017

Shopping struggles ease as VMS users age

Figure 21: VMS shopping experience, agree, by age, June 2017

Opportunity to increase spend among Hispanics

Figure 22: VMS shopping experience, agree, by Hispanic origin, June 2017

Purchase Influencers

External influencers

Doctor's recommendation wields most influence over product choice

Online reviews have supplemental, but notable, influence in purchases

At-shelf influencers

Multiple factors dictate decisions at the shelf Figure 23: VMS purchase influencers, any rank (net), June 2017

Product purchases become more consistent with age

Figure 24: VMS purchase influencers, any rank (net), by age, June 2017

English-speaking Hispanics more engaged in VMS purchases

Figure 25: VMS purchase influencers, any rank (net), by Hispanic origin, June 2017

In their words: VMS product selection

Claims Perceptions

Category confusion drives interest in a variety of claims Figure 26: VMS claims perceptions, June 2017

Purchase influencers impact claim perceptions

BUY THIS REPORT NOW



Report Price: £3085.18 | \$3995.00 | €3666.43

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

Figure 27: Select claims perceptions, by select purchase influencers - Any rank (net), July 2017

Adults aged 55+ more persuaded by specific needs than general health

Figure 28: Select VMS claims perceptions, by age, June 2017

Doctor recommended not as persuasive for Hispanics

Figure 29: Select VMS claims perceptions, by Hispanic origin, June 2017

Attitudes towards Vitamins, Minerals, and Supplements

VMS have positive perceptions

Figure 30: Attitudes towards vitamins, minerals, and supplements, June 2017

Trust and expense are a tough pill to swallow for some

Figure 31: Average US retail price of health and wellness products, by category, at current prices, August 2016- August 2017

Figure 32: Product usage and frequency-lapsed users, by those who agree these products are expensive, June 2017

Users report satisfaction with current products

Younger adults report higher pill fatigue; trouble remembering to take

Figure 33: Attitudes towards vitamins, minerals, and supplements, by age, June 2017

Hispanics hold higher category trust

Figure 34: Attitudes towards vitamins, minerals, and supplements, by Hispanic origin, June 2017

Perceptions of Gummies

Not a must-have, yet gummies do offer a nice break from pills

Flavor doesn't determine gummy purchase decisions Figure 35: Perceptions of gummies, June 2017

Younger adults embrace the fun and taste of gummies

Figure 36: Perceptions of gummies, by age, June 2017

Hispanic consumers more positive towards gummies

Figure 37: Perceptions of gummies, by Hispanic origin, June 2017

Appendix – Data Sources and Abbreviations

Data sources	
Sales data	
Fan chart forecast	
Consumer survey data	
Consumer qualitative research	
Direct marketing creative	
Abbreviations and terms	
Abbreviations	
Terms	

Appendix – The Market

Figure 38: Total US sales and forecast of market, at inflation-adjusted prices, 2012-22

Figure 39: Total US retail sales and forecast of vitamins, minerals, and supplements, by segment, at current prices, 2012-22

Figure 40: Total US retail sales of vitamins, minerals, and supplements, by segment, at current prices, 2015 and 2017

BUY THIS REPORT NOW



Report Price: £3085.18 | \$3995.00 | €3666.43

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

Figure 41: Total US retail sales of vitamins, minerals, and supplements, by channel, at current prices, 2012-16

Figure 42: Total US retail sales of vitamins, minerals, and supplements, by channel, at current prices, 2015 and 2016

Figure 43: Total US retail sales and forecast of vitamins, at current prices, 2012-22

Figure 44: Total US retail sales and forecast of minerals, at current prices, 2012-22

Figure 45: Total US retail sales and forecast of supplements and herbs/botanicals, at current prices, 2012-22

Figure 46: Total US retail sales and forecast of vitamins, minerals, and supplements, by segment, at current prices, 2017 (est)

Figure 47: Total US Sales growth and forecast of fish/Animal oils, at current prices, 2012-21(est)

Figure 48: Total US Sales growth and forecast of probiotics, at current prices, 2012-21(est)

Appendix – Key Players

Figure 49: MULO sales of vitamins, minerals and supplements, by leading companies, rolling 52 weeks 2016 and 2017

Figure 50: MULO sales of vitamins, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 51: MULO sales of minerals and supplements, by leading companies and brands, rolling 52 weeks 2016 and 2017

Appendix – The Consumer

Figure 52: Attitudes and opinions about health and medicine, January 2016- March 2017

Figure 53: Product usage repertoire groups, June 2017

Methodology

Figure 54: TURF Analysis-Claims perception, June 2017

BUY THIS REPORT NOW