

The Natural Health Consumer - US - 2021

Report Price: £3695 | \$4995 | €4400

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

This report looks at the following areas:

- How COVID-19 changed the way consumers think about and evaluate OTC products
- How to make natural products competitive with traditional OTC products
- Why education about natural products and ingredients is so critical
- Opportunities with key demographics, like parents

48% of consumers turn to natural OTC products because they are free from harmful ingredients, indicating that “natural” is just as much, if not more, about what is not included as it is about what ingredients are used. COVID-19 heightened this awareness about what ingredients are used in OTCs, presenting an opportunity for natural products to replace traditional products that may give consumers pause. Traditional OTCs are, and will remain, the biggest threat to natural products, with familiarity driving competition more than any other quality. Education, then, becomes the cornerstone to marketing efforts, which should include points about ingredients included and excluded.



“Natural health OTC products are uniquely positioned to reach consumers worried about the safety of traditional ingredients who also want to actively treat or prevent certain symptoms or illnesses. The barrier, however, is that many consumers do not know which products or ingredients are right for them, making traditional products the easier choice.”

– Michele Scott, Senior Analyst

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

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
- This Report looks at the following areas
- Definition
- Market context
- Economic and other assumptions
- COVID-19: US context

EXECUTIVE SUMMARY

- Top takeaways
- Market overview
- Impact of COVID-19 on natural health OTC products
Figure 1: Short-, medium- and long-term impact of COVID-19 on natural healthcare, 2021
- Opportunities and challenges
- Think beyond kids with parents
- Better together
- Traditional OTCs remain strongest competition
- Natural OTC product brands can become a resource
- Immune health remains relevant
- Build confidence with smaller issues
- Holistic health brings opportunities beyond physical, mental

MARKET SIZE

- The VMS market as a key component of natural OTCs
Figure 2: Total US sales and fan chart forecast of market, at current prices, 2015-25
Figure 3: Total US sales and forecast of vitamins, minerals and supplements, at current prices, 2015-25
- Herbs and botanicals take leaps and bounds
Figure 4: US herbs and botanics sales and projected growth
- OTCs are biggest competition
Figure 5: Use of OTC health products in past 6 months, 2021
- Pain relief wins
Figure 6: Use of OTC health products in past 6 months, 2021
- Natural ingredients can't work alone
Figure 7: Motivations to change pain relief method, 2021

MARKET FACTORS

- Regulations can be restrictive
- Consumers tighten budgets amidst economic challenges
- Younger consumers offer opportunities from multiple angles

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

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

- Natural OTCs lean into wellbeing trends
- Environmental concerns a hidden opportunity

COMPANIES AND BRANDS – KEY TAKEAWAYS

- Name recognition matters
- Highlight health trends like gum health, mental wellness and spiritual health issues
- Treatments for kids engage parents, create future consumers
- Claims are tricky business

COMPETITIVE STRATEGIES

- Ground products with verifiable claims
Figure 8: Product and packaging claims
- Bridge gaps in recognition with other ingredients
Figure 9: Recognizable ingredients
- Give attention to gum health
Figure 10: Dental care
- Embrace need for mental wellbeing
Figure 11: Stress relief and sleep
- Make wellness a spiritual experience
Figure 12: Spiritual wellness
- Win over parents with products specifically for kids
Figure 13: Children’s Wellness

MARKET OPPORTUNITIES

- Create dynamic duos
- Consumers need to see to believe
- Keep tone educational, conversational
- Keep costs on par with competitive set

THE CONSUMER – KEY TAKEAWAYS

- OTCs compete with other OTCs
- Natural products are not heavy lifters
- Highlight risk reduction with naturals
- Find ways to breed familiarity
- Natural carries assumptions about safety
- COVID changed the game

PRODUCT USAGE

- Traditional OTCs remain the key competitive set
Figure 14: Use of OTC health products in past 6 months, 2021
- Women are using more OTC products than men

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

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

Figure 15: Use of OTC health products in past 6 months, by gender, 2021

- Racial gaps close for natural health products**

Figure 16: Use of OTC health products in past 6 months, by race/ethnicity, 2021

- Parents provide opportunity**

Figure 17: Use of OTC health products in past 6 months, by parental status, 2021

REASONS FOR NOT USING

- Natural health products must overcome force of habit**

Figure 18: Reasons for lack of use of OTC health products with natural ingredients, 2021

- Win over women by becoming familiar**

Figure 19: Reasons for lack of use of OTC health products with natural ingredients, by gender, 2021

- Education important across race and ethnicity**

Figure 20: Reasons for lack of use of OTC health products with natural ingredients, by race/ethnicity, 2021

- Give consumers a reason to become familiar**

Figure 21: Reasons for lack of use of OTC health products with natural ingredients, by parental status, 2021

EXPERIENCE AND INTEREST IN NATURAL OTC HEALTH

- Ease consumers in with everyday concerns**

Figure 22: Experience and interest with OTC health products that have natural ingredients, 2021

- Expand conversations about health**

Figure 23: Experience and interest with OTC health products that have natural ingredients, by gender, 2021

- Life stage and confidence matter for natural health products**

Figure 24: Experience and interest with OTC health products that have natural ingredients, by age, 2021

REASONS FOR USE

- First, do no harm for natural products**

Figure 25: Reasons for use of OTC health products with natural ingredients, 2021

- What's not inside counts**

Figure 26: Reasons for use of OTC health products with natural ingredients, by gender, 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



Report Price: £3695 | \$4995 | €4400

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

IMPORTANT ATTRIBUTES

- **Vitamins provide the best of both worlds**
Figure 27: Associated characteristics with specific ingredients, 2021
- **Different health movements appeal to men vs women**
Figure 28: Associated characteristics with specific ingredients, by gender, 2021
- **OTCs impacted by medical mistrust**
Figure 29: Associated characteristics with specific ingredients, by race/ethnicity, 2021

COVID-RELATED CHANGES IN ATTITUDES

- **COVID changed health conversations for almost all**
Figure 30: Changes in attitudes towards OTC health products with natural ingredients due to COVID-19, 2021
- **Men take OTC products seriously**
Figure 31: Changes in attitudes towards OTC health products with natural ingredients due to COVID-19, by gender, 2021
- **Younger consumers more price conscious**
Figure 32: Changes in attitudes towards OTC health products with natural ingredients due to COVID-19, by age, 2021
- **Disparate effects of COVID impact natural OTC health attitudes**
Figure 33: Changes in attitudes towards OTC health products with natural ingredients due to COVID-19, by race/ethnicity, 2021

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Consumer survey data**
- **Abbreviations and terms**
- **Abbreviations**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.