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Table 1: Herb Sales by Channels (2009-2011)
THE US NUTRITION AND DIETARY SUPPLEMENTS MARKET

INDUSTRY OVERVIEW

Nutrition and Dietary supplements market represent a vast market offering immense opportunities for vitamins, minerals, herbs, meal supplements, sports nutrition products, natural food supplements and other similar products offered by manufacturers and traders. This industry has a structured supply chain wherein process starts from raw material providers who either produce raw material or collect from other sources and then sell it to supplement manufacturers. These manufacturers process the raw material and produce supplements in different forms such as pill, capsule, tablet, powder or liquid. In the next steps the third party distributors’ work as a mediator between retailers and manufacturers to market the supplements to the final consumers.

Figure: The US Nutrition and Dietary Supplements Industry Supply Chain
MARKET SIZE

The nature of the industry is fragmented and uses various sources to make it available to the final consumers, such as – supermarkets, medical stores, specialty outlets and mail order companies promoting products through TV channels. Also, internet is contributing a major share in the growth of supplements demand. The nutritional supplements industry is mainly divided into – vitamins, minerals and herbal supplements, sports nutrition products, diet products and other wellness products. Sales of nutritional and dietary supplements (including sports nutrition) grew in 2010, with the highest growth registered in the conventional (food, drug and mass merchandisers/FDM) channel. Diet formula sales decreased in both the natural and FDM channel.

**Figure: Nutrition and Dietary Supplements Retail Sales by Value in the US (2006-2016F)**

The market is expected to grow at a CAGR 4.54% between 2011-2016 driven by sports nutrition and weight loss demand and multivitamins demand. Vitamin B & C along with demand for calcium is also expected to support the growth.
Vitamins and minerals account for the largest percent of the total US nutrition and dietary supplements industry due to high usage in females and aging society. Share of herbal supplements grew from 11.40% in 2010 to ~% in 2011. Meal replacement supplements demand is reflecting positive growth trend y/y.

**Figure: Vitamin and Dietary Supplements Demand by Product Category in % (2010 & 2011)**
During credit crises, the US vitamin manufacturers enjoyed strong growth while even after lowering down the impact of recession, vitamin demand continued to grow. Vitamins segment account for the largest source of revenue in the overall US dietary supplements industry. Rising demand for vitamin supplements indicate trend towards healthier lifestyle, concern for obesity and rising cases of heart disease. Multivitamins are becoming popular in the vitamins and minerals category. Generally vitamins and minerals are perceived as a part of the same segment but with the growing popularity of mineral supplements, this category will soon make a separate place. Vitamin and mineral supplement industry has witnessed strong growth in recent past. From 2006 to 2010 demand for vitamins (especially vitamin D, C and E) showed a strong growth mainly during the period of economy crises; while witnessed a fall in growth rate in 2011.

**Figure: Vitamin and Mineral Market and Forecast (2006-2016F)**

![Graph showing vitamin and mineral market and forecast from 2006 to 2016F](image)

The US vitamin and mineral market is poised to achieve growth in the future with escalating popularity of vitamin syrups and tablets.
Calcium is one of the most on demand supplements in minerals category driven by women population, rising aging population, arthritis cases, osteoarthritis, bone fractures and other bone and joint diseases. Availability of calcium supplements in mass merchandise stores and in supermarkets has increased its reach to final consumers.

Figure: Calcium Supplements Retail Sales by Value (2006-2011)
SPORTS NUTRITION AND WEIGHT LOSS MARKET AND FORECAST

The US sports supplement market is leading worldwide with 57% market share. This sector was affected by recent economic crisis when people preferred to manage funds rather than spending on gymnasiums or health clubs. The year 2011 brought hope for sports supplements and beverage manufacturers. Sports beverage market is enjoying a good growth but soon is expected to reach on maturity stage and then need for another form of sports supplement will arise. Development of new product will include natural/herbal ingredients with new flavors and diet control calories. In 2011, sports nutrition and weight management segment accounted for around 41.30% of the US nutritional and dietary supplements market. Demand for sports beverages in addition to supplements and foods, is highest in the US.

Figure: Sports Nutrition and Weight Loss Management Market by Value (2006-2016F)

WHEY PROTEIN MARKET

Whey protein net trade has increased over the period, even during recession this sector produced positive results and in 2010 demand grew at 6.60% due to increasing usage in food products such as ice creams, beverages, salad dressing and sports supplements. Also one fourth part of the total sales comes from animal feed and dairy food. Rise in prices of whey
proteins has also been witnessed with increasing usage. Its usage is high in preparing infant formula milk and other functional foods and beverages.

**Figure: The US Whey Powder Market Production by Volume, 2007-2011**

THE US HERBAL SUPPLEMENTS MARKET AND FORECAST

In the US, many channels are available to market herbal supplements like mail order, TV channels, internet, natural therapy institutes, medical stores and various other channels. In 2010, the leading single herbal supplements in the US were aloe (Aloe vera), wheat grass and turmeric (Curcuma longa). Consumer behavior and their standard of living habits have changed over the period. Internet shopping is becoming a popular trend generating high demand for herbal supplements led by the development of secure payment portals and easy access. The increase in sale of herbal supplements in 2010 reflects the strong demand witnessed in 2009, despite the recession. In 2009, the herbal supplement market grew by almost 5.00%. In 2011, another boost in sale was observed and herbal dietary supplements retail sales have increased by 8.38%.
Trade channel sales reflect an increase in overall herbal drugstore sales such as, sales in the direct sales channel increased by 13.54% in 2011. Herbal supplements are slowly gaining importance in mass markets as well but at a slow growth rate.

**Table: Herb Sales by Channels (2009-2011)**

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<thead>
<tr>
<th></th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
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<td>Mass Market</td>
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<tr>
<td>Natural &amp; Health Food</td>
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<td>Direct Sales</td>
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<td>Total</td>
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*Note: Figures in USD Million*

**THE US HEALTHCARE SPENDING**

Healthcare expenditure in the country are rising with increasing number of aging society, improved technology, and better medical facilities, rising number of insured population and increasing obesity cases. Other factors such as growing income level, educated population and health conscious segment of the population are also contributing to the healthcare spending.
Figure: The US Average Annual Cost of Healthcare (2006-2011)

Figure: The US Healthcare Expenditures (2000-2010)

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