SA VITAMINS AND SUPPLEMENTS
INDUSTRY LANDSCAPE REPORT

FEBRUARY 2016
The South African Vitamins and Supplements Landscape Report (91 pages) provides a dynamic synthesis of industry research, examining the local and global Vitamins and Supplements industry from a uniquely holistic perspective, with detailed insights into the entire value chain – from manufacturing to retail and consumption.

SOME KEY QUESTIONS THE REPORT WILL HELP YOU TO ANSWER:

For the Global Vitamins and Supplements Industry Section:
- What are the current market dynamics of the global Vitamins and Supplements industry?
- What are the global Vitamins and Supplements industry trends, drivers, and restraints?

For the South African Vitamins and Supplements Industry Section:
- What are the current market dynamics of the SA Vitamins and Supplements industry?
- Who are the key manufacturing players in the SA Vitamins and Supplements industry?

For the South African Vitamins and Supplements Competitor and Pricing Analysis Section:
- Who are the key retail players in the SA Vitamins and Supplements industry?
- What are the prices of the most frequently purchased Vitamin and Supplement brands across South African retail outlets?

In terms of South African Consumer Insights and Trends:
- What are the statistical volume trends for Vitamin and Supplement purchasing (2010-2015)?
- What are the statistics regarding the most popular purchased Vitamin and Supplement brands in 2015?
91 page report filled with detailed charts, graphs, tables and insights
Sports nutrition is a hot area for investment. A number of leading producers were acquired by major pharmaceutical or ingredient companies, and more chained retailers invested in private label.

- However the fast-growing pre-workout supplements, are the target of increased regulatory scrutiny. Producers have work to do to overcome negative perceptions based on past indiscretions.

### Sports Nutrition vs. Other Consumer Health Main Categories

<table>
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<th>Category</th>
<th>Retail Value (US$ million rsp) 2013</th>
<th>% CAGR 2013-2018</th>
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<tbody>
<tr>
<td>OTC</td>
<td>98,029</td>
<td>2.3</td>
</tr>
<tr>
<td>Vitamins and Dietary Supplements</td>
<td>84,434</td>
<td>4.0</td>
</tr>
<tr>
<td>Sports Nutrition</td>
<td>8,857</td>
<td>8.5</td>
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Source: [http://www.euromonitor.com](http://www.euromonitor.com)
**Seasonality:**

- Cold weather has an impact on demand for health and wellness products in South Africa with a significant seasonal volumetric shift in the immune support segment, although this is not generally at the expense of either vitamins or supplements.

- Top immune support brands increase their volumes into the winter season by up to 50% more than the out of season period between October and March. This shift has little impact on advertisement spend or the strategies brands employ seasonally.

**Economical Pack Sizes:**

- Economic factors are driving lower emerging market consumers to trade down, with pack size and price formats being key growth factors.

Source: [http://www.financialmail.co.za/](http://www.financialmail.co.za/)
Leading Adcock Ingram Vitamin Brands:

- Bioplus is one of Adcock Ingram’s market leading brands and was top ranked in both volume and value in the energy segment.

- The brand posted healthy growth in 2015 and grew ahead of the market in the energy supplements category as well.

- Gummy Vites achieved a 10% market share in its particular sub-category (i.e. kids range), and is ranked 7th overall in the Vitamins category.

- In 2015, Probiflora led the gut health segment in the Vitamins section of the market.

- Vita-thion was in third position in the pharmacy energy market in South Africa in 2015.

- Vita-thion grew at 14.6% in 2015, and is the only energy tonic registered in South Africa to contain ATP.

- ADDvance Vitamins were negatively impacted by new entrants into the South African market in 2015, resulting in a loss of market share.

Source: [http://www.adcock.com/](http://www.adcock.com/)
Dis-Chem is South Africa’s second-largest retail chain of pharmacies by share. However, they are swiftly closing the gap on leaders Clicks through their aggressive expansion plans.

- Dis-Chem is opting for the franchise route to accelerate expansion plans, whilst mirroring Clicks’ loyalty program as its primary customer retention strategy.

- As of 2015, Dis-Chem had a pharmacy market share of 15% in South Africa (with Clicks holding approximately 18%).

- Although Dis-Chem’s market share is still smaller than that of Clicks, Absa Investments retail analyst Chris Gilmour stated that “It is a force to reckon with”.

- However Avior Capital Markets analyst Kyle Rollinson downplayed the rivalry between the two retail giants, stating that “At this stage, it’s not a direct play-off between Clicks and Dis-Chem, as both are still taking market share from independent pharmacies.”

- The strategic outlook for Dis-Chem in 2016 includes scouting for partners in outlying SADC areas (more specifically Namibia and Botswana).

- Dis-Chem also plans to expand its ecommerce offerings to include special-needs products (including Vitamin and Supplements) not kept in stores.

Source: http://www.bdlive.co.za/; http://dischem.co.za/
Between 2010 and 2015, the proportion of purchasers who were classified as “Heavy” had decreased by 1% from 25% to 24%, the proportion of purchasers who were classified as “Medium” had decreased by 3% from 38% to 35%, while the proportion of purchasers who were classified as “Light” had increased by 4% from 37% to 41%.

Source: AMPS 2010-2015 (Adult population 16+ years) (Vitamin/Supplement personally bought past 4 weeks)
Sample Size: 24,414 (2010); 24,527 (2011); 24,528 (2012); 24,882 (2013); 25,060 (2014); 25,078 (2015)
Based on weighted numbers
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South African Vitamin and Supplement Pricing Analysis (conducted w/c 20 January 2016)


Comparative Pricing at Retail Outlets: Dis-Chem, Clicks, Medirite, Link, Pick n Pay Pharmacy
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