REPORT OVERVIEW

The **South African Vitamins and Supplements Landscape Report** (103 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 age, LSM, gender, home language, province and life stages for Vitamin and Supplement household purchasers (2011-2015)?
SCREENSHOTS FROM REPORT

103 page report filled with detailed charts, graphs, tables and insights
According to statistics, there was significant growth globally in the market size of the Vitamins and Supplements industry from US$ 88.4 billion in 2014 to US$ 91.5 billion in 2015.

The Vitamin and Supplements market is segmented by product type (MultiVitamin, Vitamin B, Vitamin C, Vitamin D, and others), end user (adult women, adult men, senior citizens, and others), and application (food and beverage, pharmaceutical, personal care, and others).

The global Vitamin and Supplements market is highly competitive, with numerous multinationals operating in the market.

BASF SE sells its products in over 200 countries and lead the market with revenue of US $95.3 billion. There are also a few regional players operating in the market.

Other major players operating in the global Vitamin Supplements market are: NBTY, Inc., Glanbia plc, Reckitt Benckiser Group plc, Archer Daniels Midland Company (ADM), E.I. du Pont de Nemours and Company (DuPont), Koninklijke DSM N.V. (DSM), Integrated BioPharma, Inc., Bayer AG, Pharmavite LLC, Nutraceutical Corporation, and Herbalife International, Inc. (Herbalife).
Within the South African market, Adcock Ingram leads the overall Vitamins and Dietary Supplements market, while USN leads the sports nutrition market, with both players having double digit value share in their respective markets.

- However, recent regulatory changes put forward by the Department of Health propose stricter procedures for registering over-the-counter 'complementary medicines' – similar to those required for prescription pharmaceutical drugs.

- Due to these regulations starting to be implemented, the market in South Africa hasn't had as strong growth when compared to markets in Europe or in other developing markets.

- The Department of Health subsequently broadened the definition of natural and complementary medicines via proposed legislation published in July 2016.

- If the new 2016 proposals for regulations of Vitamins and Dietary Supplements are passed at the start of the forecast period, this will reduce uncertainty in this area and enable the processing of a backlog of product registrations.

- In spite of the revisions within legislation, the implementation of the new legislation has been met with fierce resistance from the industry amid concerns that the definition of complementary medicines could force many products off the market.
Customised nutrition:

- Unlike the majority of Vitamin and Mineral Supplements, which are intended to support good health in a generalized sort of way, the following Supplement categories and others like them are all about targeting specific consumer needs.

- Sports Nutrition Supplements
- Women’s Health Supplements
- Probiotics Supplements
- Cognitive Health Supplements
- Joint Support Supplements

Sales of herbs, botanicals, and other homeopathic Supplements grew by nearly 17% in 2016:

- For those looking to capitalize on the increased consumer interest in Herbal and Botanical Supplements, making a continued effort to craft Supplements from pure, high-quality ingredients is likely to play a major role in fueling this category’s recent growth (and mending its slightly tarnished reputation).

Weight loss awareness:

- South Africa has the highest overweight and obesity rate in sub-Saharan Africa, with up to 70% of women and a third of men being classified as overweight or obese in 2016.

- This has been a prominent driver in the sales of Dietary Supplements.

- A new weight loss Supplement, Garcinia Cambogia has gained huge popularity in the Supplements market.

- Ascendis Consumer Brands segment includes nutraceuticals, complementary medicines, sports nutrition and skin care products and contributes 24% to the group revenue.

- The decline in Consumer Brands revenue was attributed to the impact of regulations for complementary and alternative medicines (CAMS) on Solal, restructuring of the sports nutrition market and poor consumer environment in Nigeria.

- However, the integration of several key businesses in the 2015 and 2016 financial year has given the Vitamins and Supplements product portfolio a significant boost.
In 2015, the majority of vitamin and supplement purchasers were aged both 35-49 years and 50+ with 32%.

Between 2011 and 2015, the proportion of vitamin and supplement purchasers aged 50+ increased from 31% to 32%, while the proportion of vitamin and supplement purchasers aged 35-49 decreased from 33% to 32%.

Source: AMPS 2011-2015 (Adult population 16+ years) (Vitamin/Supplement personally bought past 4 weeks)
Sample Size: 14 074 (2011); 14 074 (2012); 14 978 (2013); 15 236 (2014); 15 686 (2015)
Based on weighted numbers
# TABLE OF CONTENTS

## 1. Executive Summary (4 pages):

1.1 Global Industry Snapshot 2016  
1.2 South African Industry Snapshot 2016  
1.3 Industry Drivers and Restraints  
1.4 SA Consumer Snapshot 2016  

## 2. Global Vitamins and Supplements Industry (16 pages):

2.1 Global Vitamins and Supplements Industry Overview: **COMPOUND ANNUAL GROWTH RATE (CAGR) OF THE VITAMIN, MINERAL AND SUPPLEMENTS MARKET WORLDWIDE FROM 2012 TO 2017 BY CATEGORY; MARKET SIZE OF VITAMINS AND DIETARY SUPPLEMENTS WORLDWIDE IN 2014 AND 2015, BY REGION (IN MILLION U.S $’s); (Graphs)**  
2.2 Global Vitamins and Supplements Industry Market Trends  
2.3 Global Vitamins and Supplements Industry Market Drivers  
2.4 Global Vitamins and Supplements Industry Overview: Regional  
2.5 Global Vitamins and Supplements Industry Overview: Asia-Pacific: **BREAKDOWN OF THE DOMESTIC, FMCG INDUSTRY IN INDIA IN FY 2016*, BY REVENUE (Graph)**  
2.6 Global Vitamins and Supplements Industry Overview: North America: **EXPENDITURE OF AFFLUENT HOUSEHOLDS IN THE U.S. ON VITAMINS AND NUTRITIONAL SUPPLEMENTS DURING 2016 (Graph)**  
2.7 Global Vitamins and Supplements Industry Overview: Europe: **VALUE OF DIETARY SUPPLEMENTS MARKET IN EUROPE IN 2015 AND FORECAST FOR 2020, BY REGION (IN BILLION EUROS) (Graph)**  
2.8 Global Dietary Supplements Overview  
2.9 Global Dietary Supplements Trends and Projections: **USAGE OF DIETARY SUPPLEMENTS AMONG U.S. ADULTS IN 2015, BY GENERATION (Graphs)**  
2.11 Global Sports Supplements Trends and Projections

### 3.1 South African Vitamins and Supplements Industry Overview (11 pages)

3.1.1 South African Vitamins and Supplements Industry Overview
3.1.2 South African Vitamins and Supplements Market Environment
3.1.3 South African Vitamins and Supplements Industry Trends
3.1.4 South African Vitamins and Supplements Industry Drivers
3.1.5 South African Vitamins and Supplements Industry Restraints

### 3.2 South African Vitamins and Supplements Manufacturing Overview (26 pages)

3.2.1 SA Vitamins and Supplements Manufacturers: Adcock Ingram
3.2.2 SA Vitamins and Supplements Manufacturers: Ascendis Health
3.2.3 SA Vitamins and Supplements Manufacturers: Bayer
3.2.4 SA Vitamins and Supplements Manufacturers: Cipla
3.2.5 SA Vitamins and Supplements Manufacturers: Inova Pharmaceuticals
3.2.6 SA Vitamins and Supplements Manufacturers: Nativa
3.2.7 SA Vitamins and Supplements Manufacturers: Novartis
3.2.8 SA Vitamins and Supplements Manufacturers: Pfizer
3.2.9 SA Vitamins and Supplements Manufacturers: SA Natural Products
3.2.10 SA Vitamins and Supplements Manufacturers: Vital Health Foods
3.2.11 SA Vitamins and Supplements Manufacturers: Independent Supplement Companies: 32Gi, Biogen, GNC, Nutritech, USN
4. South African Vitamins and Supplements Retail Analysis (18 pages):

4.1 SA Retail Overview (9 pages)

4.1.1 SA Retail Overview
4.1.2 SA Retail: Clicks: RETAIL PHARMACY % OF CLICKS REVENUE 2016 (Graph)
4.1.3 SA Retail: Dischem
4.1.4 SA Retail: In-Store Retail Pharmacies: MediRite, Pick n Pay Pharmacy, Spar Pharmacy
4.1.5 SA Retail: Hospital-based Pharmacies: Mediclinic Pharmacy, Netcare Pharmacy
4.1.6 SA Retail: Independent Pharmacies: Link, Alpha Pharm
4.1.7 SA Retail: Independent Vitamin and Supplement Specialists: Chrome, Xtreme Nutrition, Supplement World, Wellness Warehouse, Gateway Health

4.2 Vitamins and Supplements Pricing Analysis (9 pages) (conducted w/c 16 January 2017)


4.2.2 Whey Protein Pricing Analysis: Biogen, GNC, Nutritech, USN, Evox
4.2.3 Vitamin and Supplement Promotions

Comparative Pricing at Retail Outlets: Dischem, Clicks, MediRite, Link, Pick n Pay Pharmacy.
5. South African Consumer Trends (12 pages):

5.1 South African Consumer Trends Overview
5.2 AMPS Survey Methodology and Sample Design
5.3 AMPS Survey Questions Asked
5.4 Vitamins and Supplements Volume Trends (Past 4 Weeks): 2010-2015 (*Graph & Table*)
5.5 Vitamins and Supplements Household Purchasers (Age): 2011-2015 (*Graph*)
5.6 Vitamins and Supplements Household Purchasers (LSM 8-10): 2011-2015 (*Graph*)
5.7 Vitamins and Supplements Household Purchasers (Gender): 2011-2015 (*Graph*)
5.8 Vitamins and Supplements Household Purchasers (Home Language): 2011-2015 (*Graph*)
5.9 Vitamins and Supplements Household Purchasers (Province): 2011-2015 (*Graph*)
5.10 Vitamins and Supplements Household Purchasers (Life Stages): 2011-2015 (*Graph*)
ORDER FORM

ORDERING INSTRUCTIONS

(1.) **Complete the order form and** email back to info@insightsurvey.co.za (2.) An invoice will be generated and e-mailed (3.) The report will be emailed upon receipt of payment or when proof of payment has been provided (4.) All prices exclude 14 % VAT.

COMPANY DETAILS

<table>
<thead>
<tr>
<th>Company Name:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical Address:</td>
<td></td>
</tr>
<tr>
<td>Town/City:</td>
<td>Postal Code:</td>
</tr>
<tr>
<td>Country:</td>
<td></td>
</tr>
<tr>
<td>Purchaser Name: (name to appear on invoice)</td>
<td></td>
</tr>
<tr>
<td>Purchaser email address:</td>
<td></td>
</tr>
<tr>
<td>Telephone number:</td>
<td>VAT number:</td>
</tr>
</tbody>
</table>

CONFIRMATION: I/we wish to order this publication (please tick)

<table>
<thead>
<tr>
<th>Title of Publication</th>
<th>Total Ex Vat</th>
<th>Tick Box</th>
</tr>
</thead>
<tbody>
<tr>
<td>South African Vitamin and Supplement Landscape Report 2017: Full Report</td>
<td>R25,000</td>
<td></td>
</tr>
<tr>
<td>South African Landscape Report 2017: One Section</td>
<td>R9,000</td>
<td></td>
</tr>
</tbody>
</table>

ACKNOWLEDGEMENT

I am authorised to order this publication on behalf of the company and agree to the payment terms.

__________________________________________  __________________________  ________________  ________________
Client (Print Name)  Signature  Capacity  Date
**COMPANY OVERVIEW**

**Insight Survey** is a South African B2B market research company with almost 10 years of heritage, focusing on business-to-business (B2B) market research to ensure smarter, more-profitable business decisions are made with reduced investment risk.

We offer **B2B market research solutions** to help you to successfully improve or expand your business, enter new markets, launch new products or better understand your internal or external environment.
Our bespoke Competitive Business Intelligence Research can help give you the edge in a global marketplace, empowering your business to overcome industry challenges quickly and effectively, and enabling you to realise your potential and achieve your vision.

From strategic overviews of your business’s competitive environment through to specific competitor profiles, our customised Competitive Intelligence Research is designed to meet your unique needs.

OUR RESEARCH SOLUTIONS

- Competitor pricing research
- Store visits and store checks
- Competitor interviews
- Customer interviews
- Company website analysis
- Governmental held records
CONTACT DETAILS

Telephone: +27 (0) 21 045-0202

Physical Address: Unit 5
Building 12
The Estuaries
Century City
Cape Town

Contact: info@insightsurvey.co.za

Website: www.insightsurvey.co.za