

Delving into the key drivers of growth of vitamins and dietary supplements in Asia Pacific

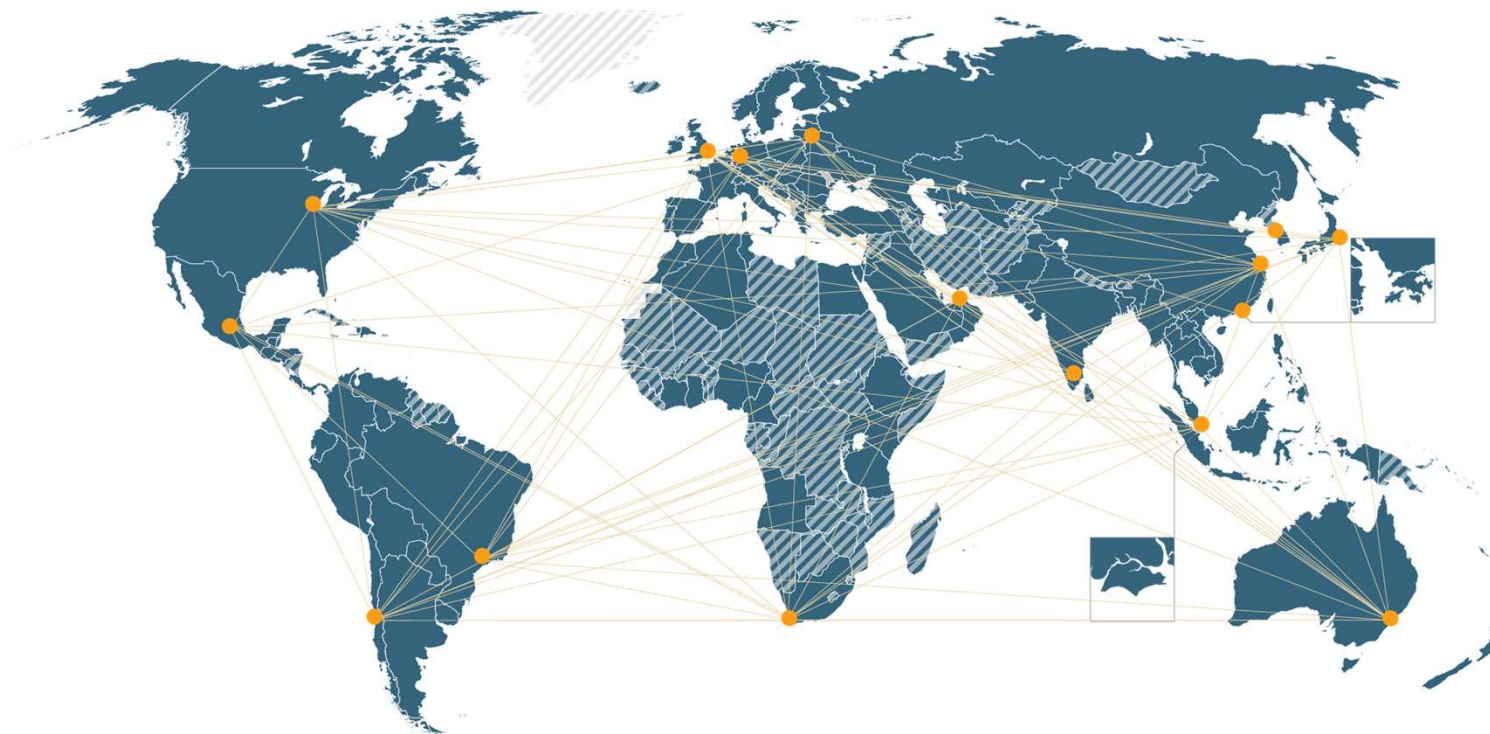
December 2022

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The data included in this report is accurate according to Euromonitor International's market research database, at time of publication: 5 September 2022

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■ 100 COUNTRIES

in-depth analysis on
consumer goods and
service industries

■ 210 COUNTRIES + AND TERRITORIES

▨ demographic, macro- and
socio-economic data on
consumers and economies

Overview

INTRODUCTION

MARKET OVERVIEW

DISTRIBUTION

FUTURE DEVELOPMENTS

KEY TAKEAWAYS



Market Overview



VDS in the Context of the Global Consumer Health Marketplace

Consumer Health
USD305 billion

OTC
USD128 billion

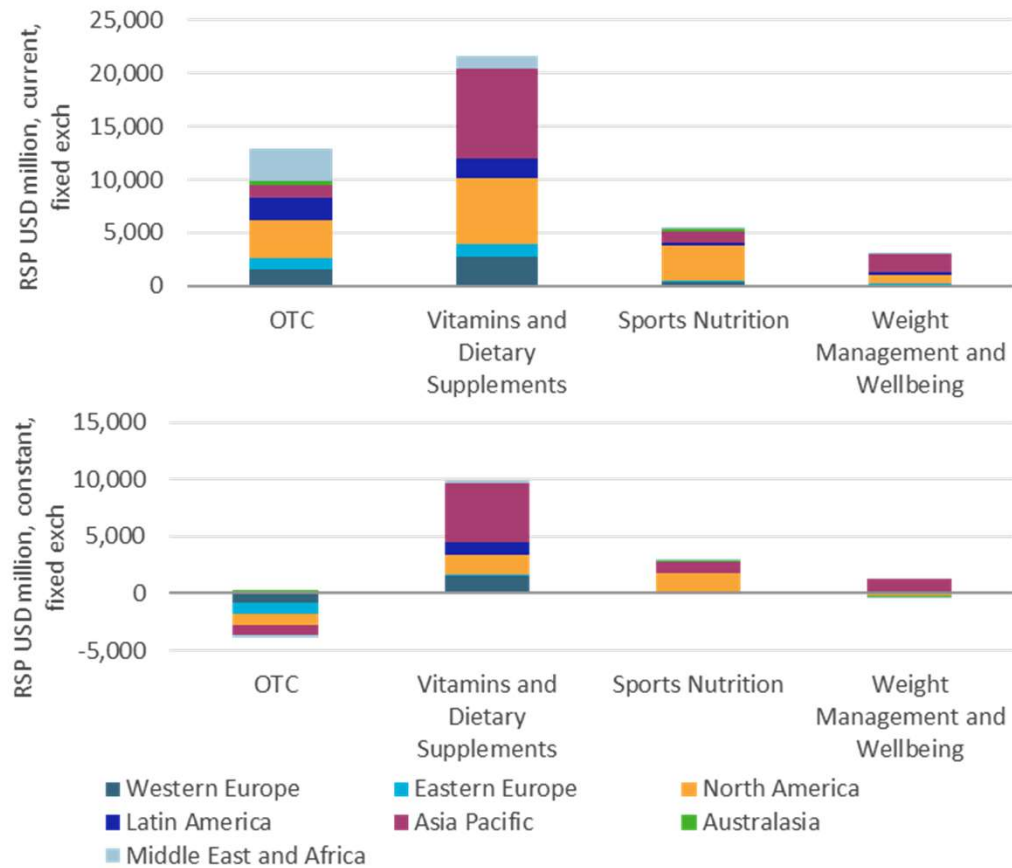
**Vitamins and Dietary
Supplements**
USD131 billion

Weight Management and
Wellbeing
USD21 billion

Sports Nutrition
USD24.6 billion

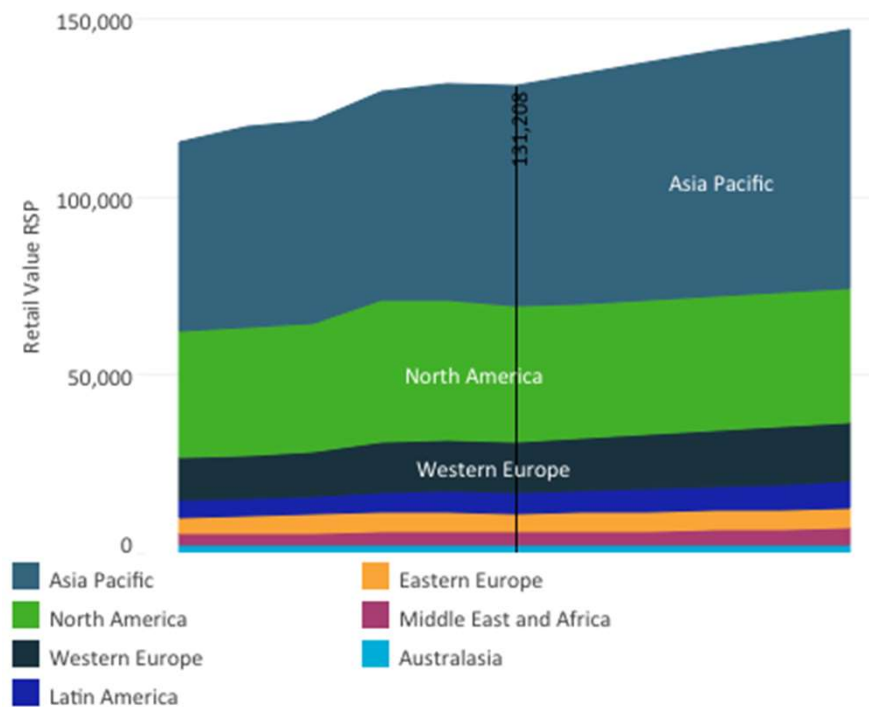
Growth since onset of COVID-19 still dominated by vitamins and dietary supplements

Absolute Growth by Category and Region 2019-2022

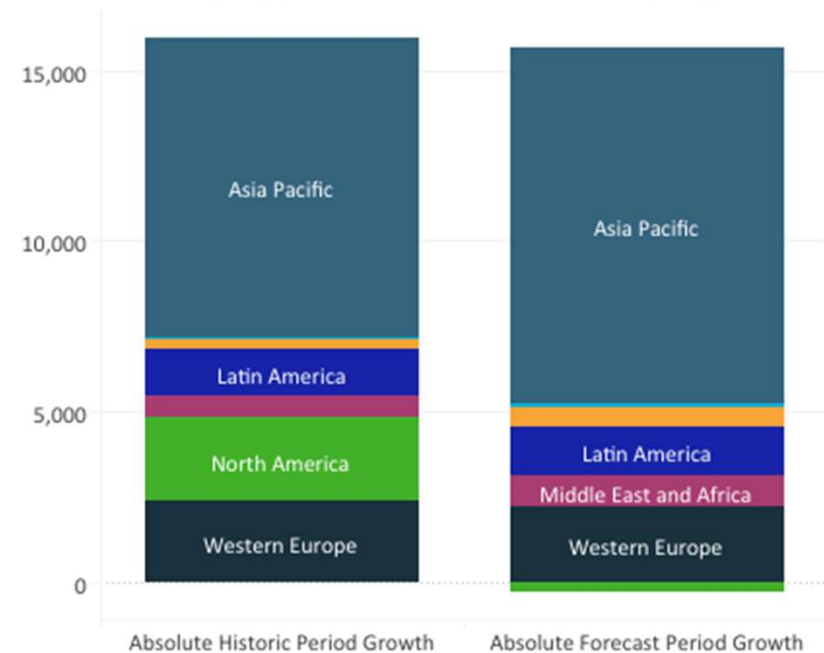


Despite China's lockdowns, Asia Pacific remains the biggest region

Vitamins and Dietary Supplements: Evolution of Global Market 2017-2027



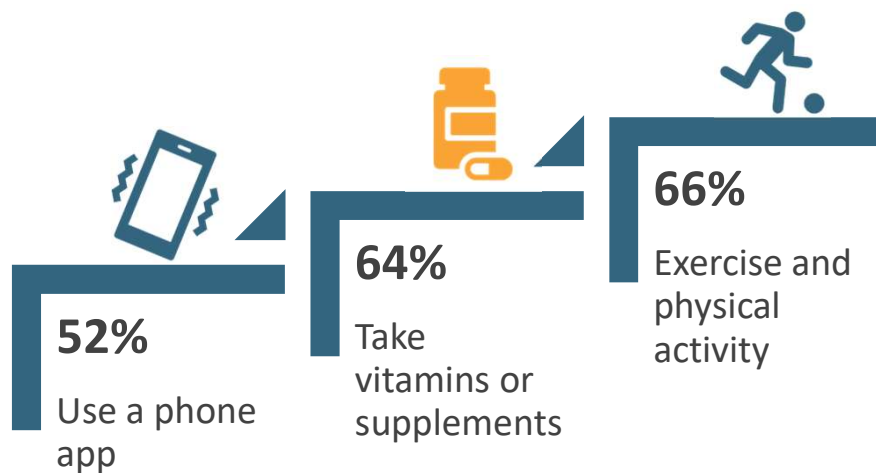
Vitamins and Dietary Supplements: Absolute Growth by Region



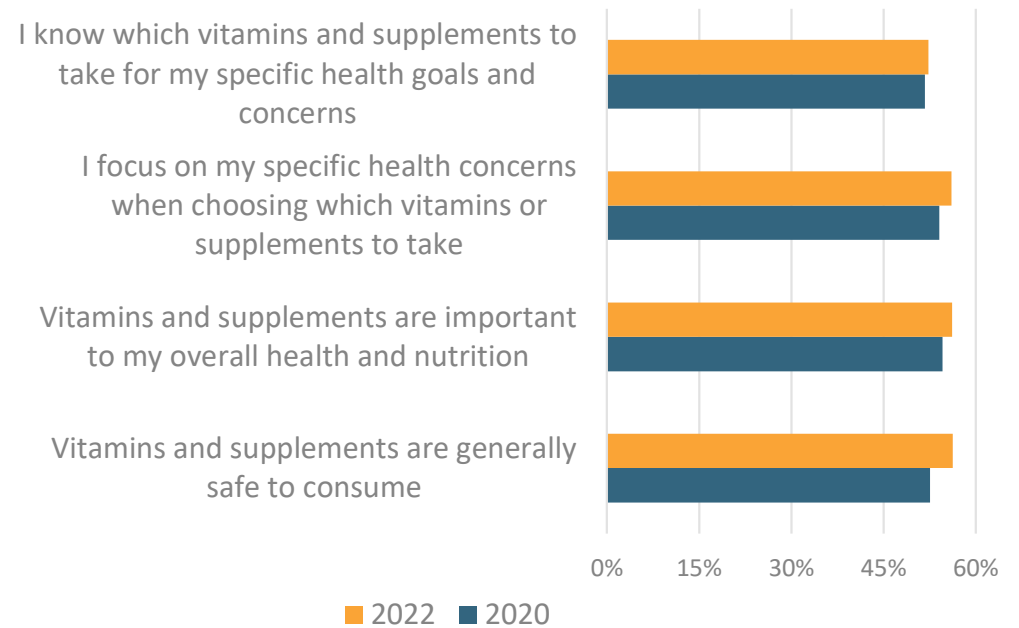
Vitamins and Dietary Supplements

Consumers in Asia have a positive view on vitamins and supplements

Most Popular Approaches to Health Prevention 2022
(% of respondents selected the approach)



Attitudes Towards Vitamins and Supplements

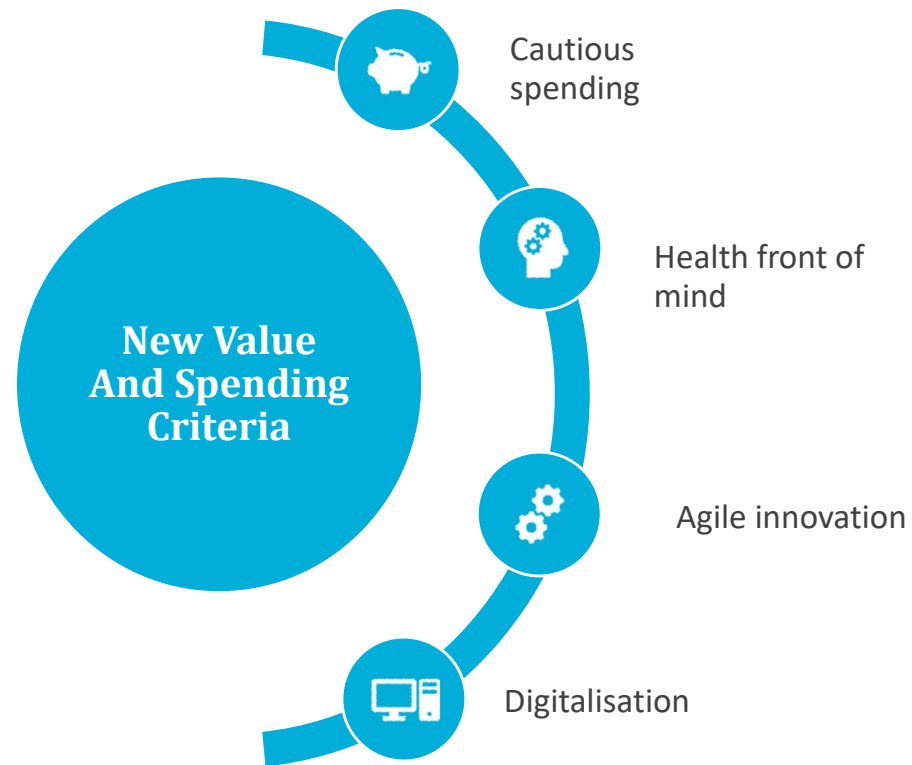


Source: Euromonitor Voice of the Consumer: Health and Nutrition, fielded January to February 2022

Distribution



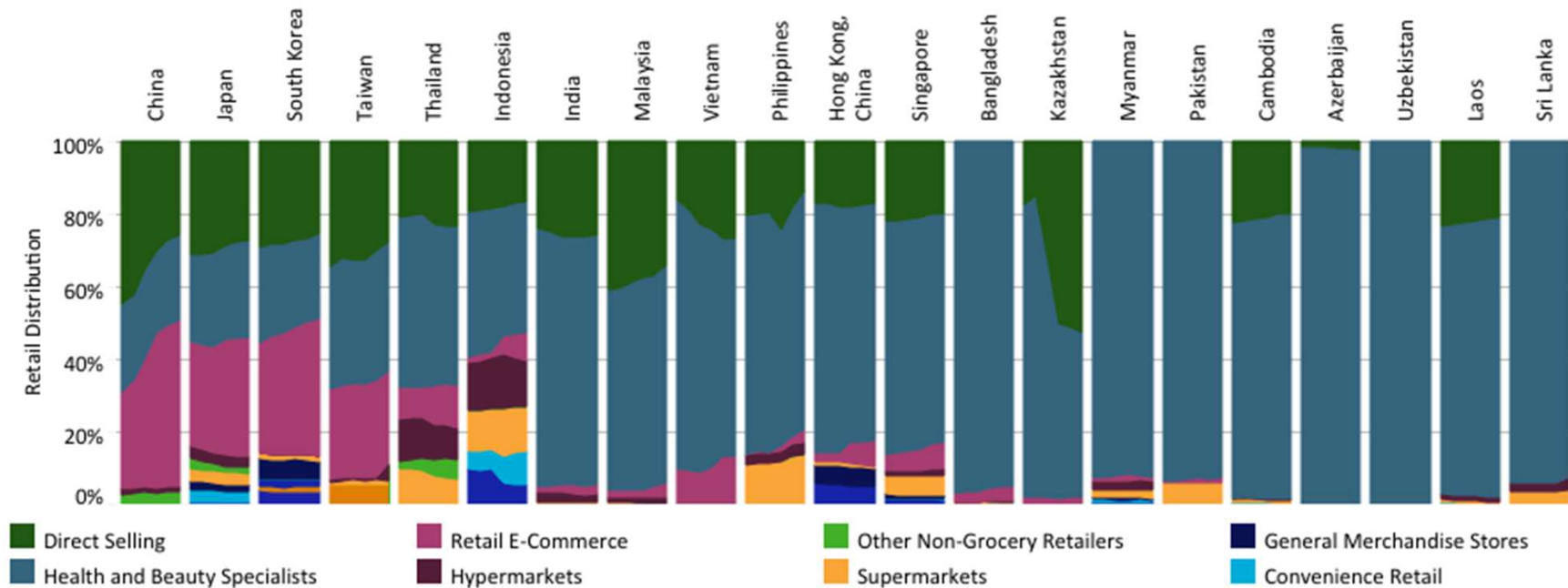
COVID-19 changed where and how consumers shop



E-commerce continues to shine as consumers' online purchasing proves sticky

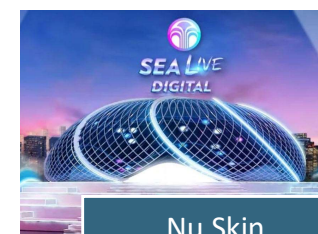
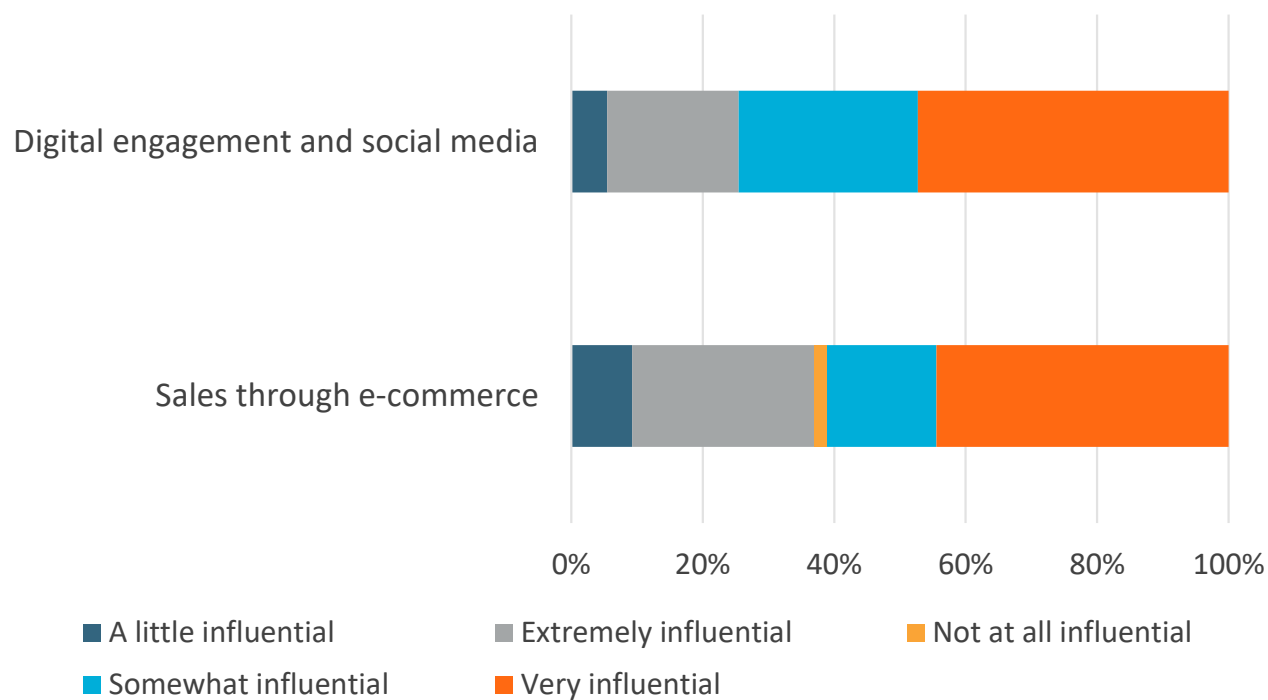
Vitamins and Dietary Supplements in Asia Pacific: Distribution by Channel 2017-2022

Retail Value RSP USD million



Shifts to e-commerce and digital engagement inevitable

Top trends impacting Consumer Health Industry Sales, 2022



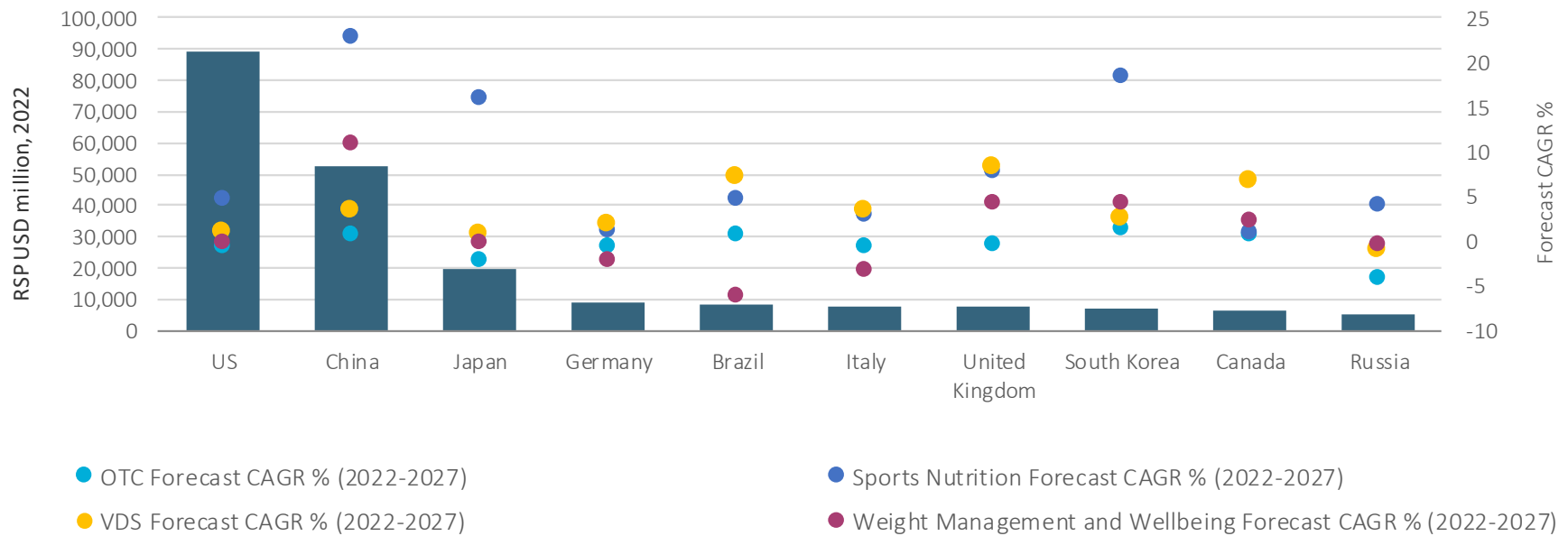
Source: Voice of the Industry: Consumer Health, fielded March 2022. (n=63)

An aerial photograph of a dense city skyline, likely New York City, viewed from a high angle. The image is heavily filtered with a warm, orange-to-yellow gradient, creating a hazy, atmospheric effect. Numerous skyscrapers and buildings are visible, with some prominent structures like the Chrysler Building and the Empire State Building. A body of water, possibly the Hudson River, is visible on the right side. The overall composition is a wide-angle shot looking down on the city.

Market Prospects

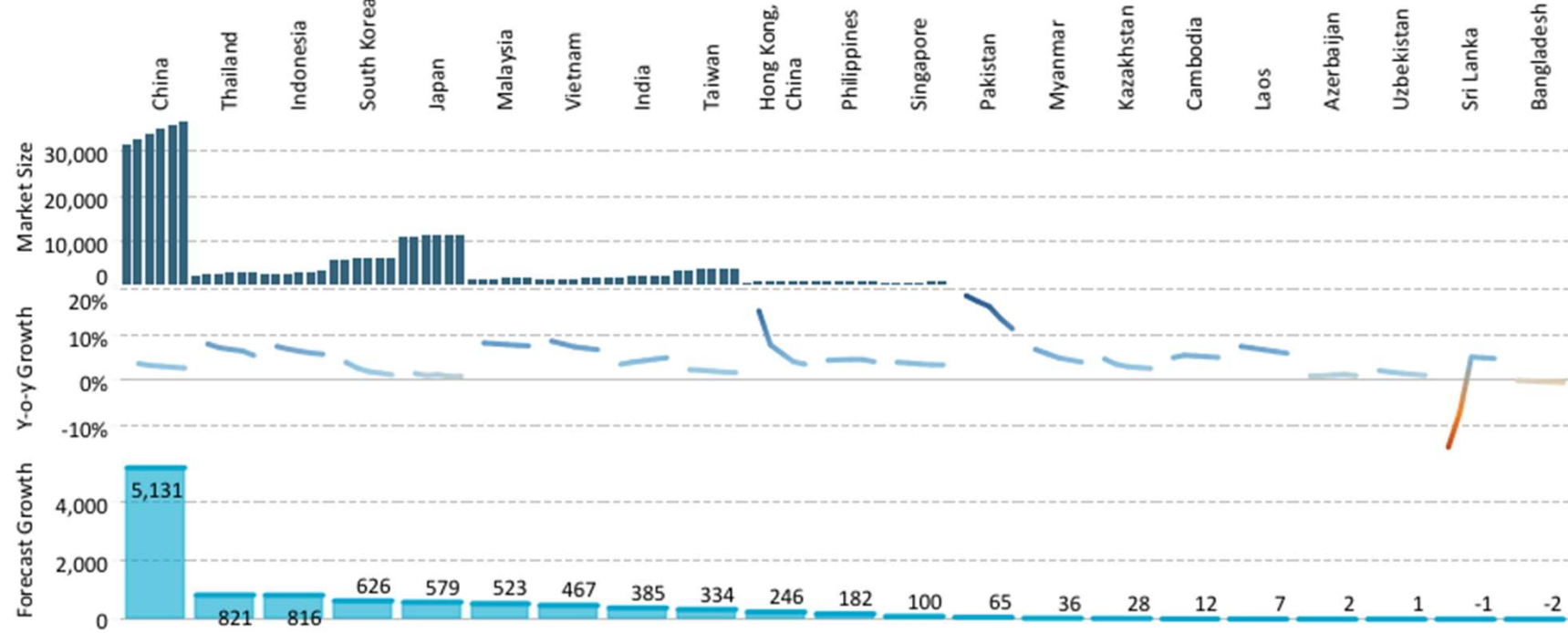
Consumer health in 2027: A future led by vitamins and dietary supplements

Leading Consumer Health Countries 2022, and Forecast CAGRs by Category



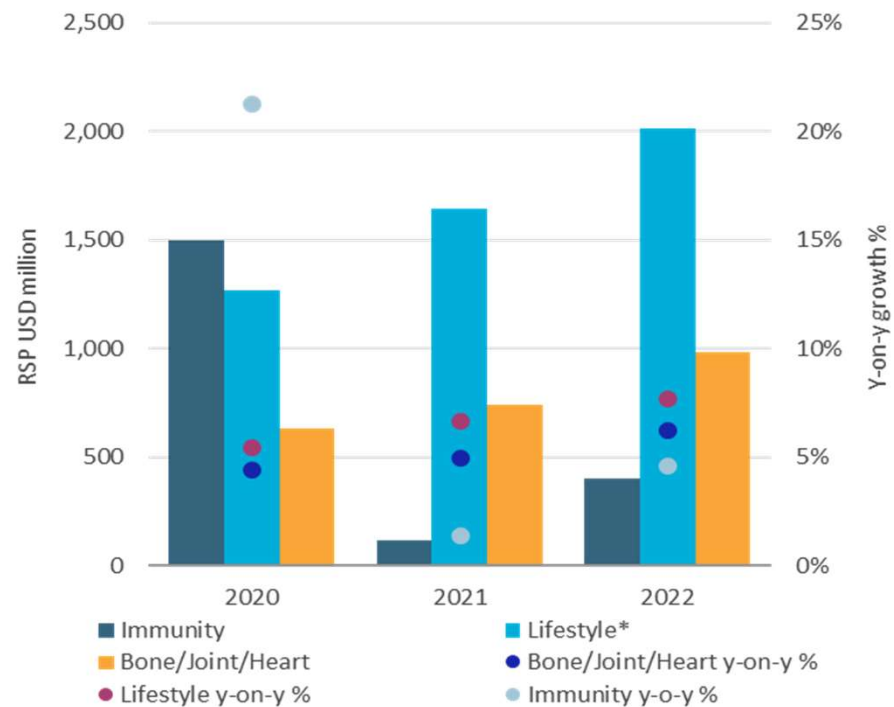
Forecast growth looks rosy for Asian leaders

Vitamins and Dietary Supplements in Asia Pacific: Forecast Market Sizes and Growth by Country 2022-2027
Retail Value RSP USD million



Lifestyle positions take centre stage in growth of vitamins and dietary supplements

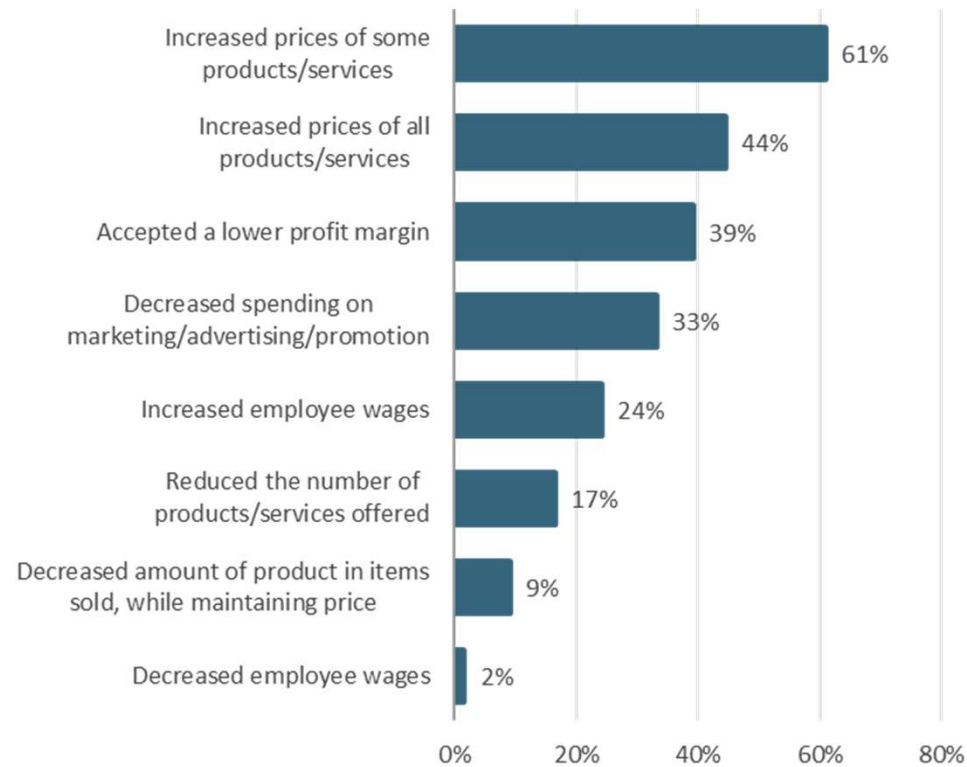
Absolute Growth in Dietary Supplements by Positioning
2020-2022



Note: *Includes Beauty, Digestive Health, Energy, Eye Health, Memory Health, Men's Health, Mood/Relaxation, Women's Health

Inflation is expected to complicate consumer health approaches in the forecast period

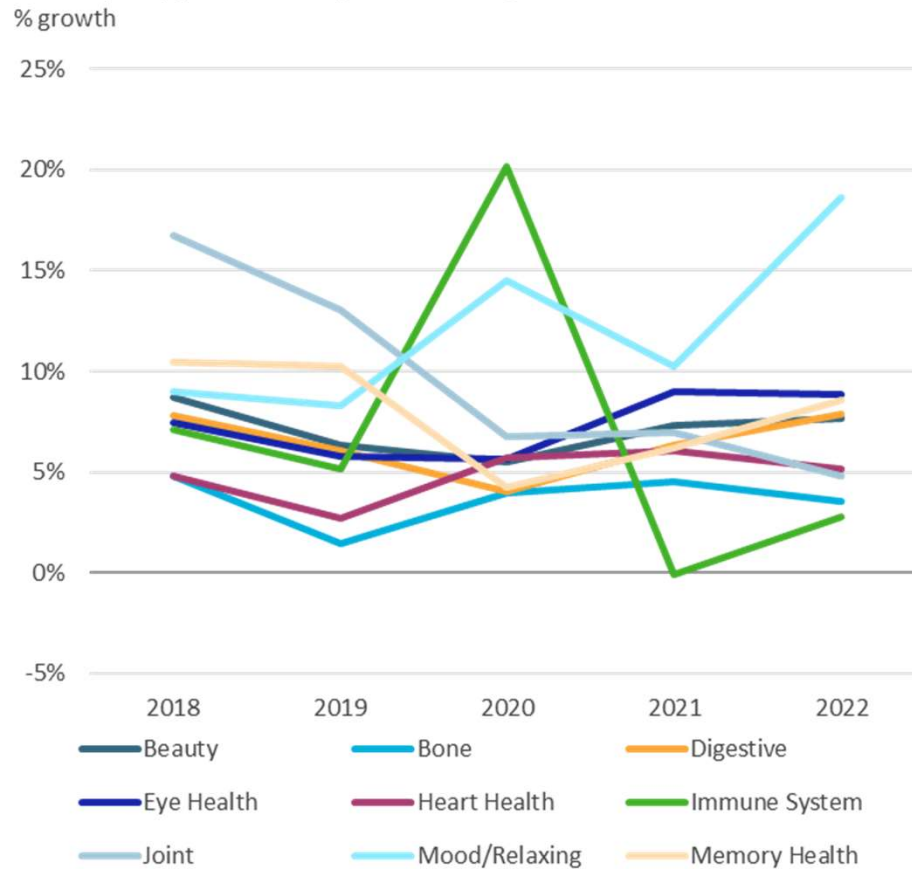
Response to inflation in the last 12 months
% of industry professionals



Source: Euromonitor's Voice of the Industry: Consumer Health Survey, March 2022

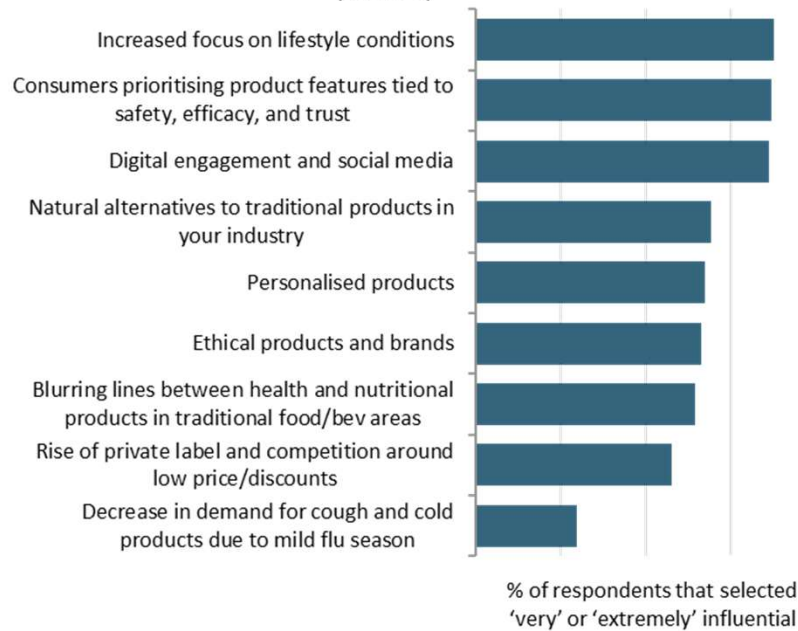
Mental health outpaces growth of other dietary supplements, presaging future gains

Dietary Supplements by Positioning, Y-0-Y Growth 2018-2022



Personalisation is expected to see intensifying interest in the coming years

Please rate the level of influence you expect these trends to have on consumer health sales across the next five years (Global)



Source: Euromonitor International Voice of the Industry: Consumer Health survey (March 2021)



Source: www.fancl.co.jp/

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LemonBox 维生素更定制、更简便、更高品质，我们为你倾心准备。

开始定制

Source: <https://lemonbox.com.cn/>

A pair of glasses and a pen are resting on a desk. The scene is overlaid with a warm, orange-to-yellow gradient. The glasses are on the left, and the pen is in the center. The background shows a blurred desk surface.

Key Takeaways

Key Takeaways

Focus on holistic wellbeing will become more pronounced as consumers pay more attention on being healthy, sleeping well and mental wellbeing

The acceleration of e-commerce and the uptake of digital selling provides great opportunity for retailers and manufacturers

Strong growth of vitamins and dietary supplements gives chance for personalisation

Thank You

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