

# **Report on Malaysia's and Singapore's nutritional supplement industry market**

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## Consumer Health in Malaysia (executive summary)

### **Improving health knowledge affects demand for consumer health**

Consumers in Malaysia indicated a stronger health awareness level in the review period with an improved literacy rate. With more households in urban areas able to easily reach pharmacies, more consumers are engaging in preventive measures to optimise wellness and self-medication for minor ailments such as mild fever, headaches or coughing.

The use of vitamins and dietary supplements in Malaysia continues to grow with the availability of massive ranges in pharmacies such as Guardian or Multicare Pharmacy and in health and beauty specialist retailers such as Watsons or AEON Wellness. Consumers' knowledge of the benefits provided by certain products, such as multivitamins, probiotic supplements, glucosamine and ginkgo biloba, helps to boost sales of these categories in Malaysia. A tremendous increase in the variants of paediatric vitamins and dietary supplements has also changed the perception of parents towards being less sceptical of introducing vitamins and dietary supplements to children.

A clean eating lifestyle and habit among Malaysians has caused more consumers to move away from taking weight loss supplements. While more Malaysians pursue the concept of eating more healthily and exercise more frequently, it reduces dependency on weight loss supplements to lose weight. Therefore, a healthier lifestyle, combining active involvement in sports activities and healthy eating, slows demand for weight loss supplements.

### **Growing number of health-conscious consumers boosts growth in consumer health**

Malaysia has the highest obesity rate in Asia at 45%. The 2015 National Health and Morbidity Survey found out that 30% of Malaysian adults aged over 18 were overweight. The rate of non-communicable diseases, such as diabetes and hypertension, in Malaysia continues to climb and has started to alarm Malaysians into taking care of their health. Therefore, the trend has caused more Malaysians to embrace healthier lifestyles by exercising more frequently and taking preventive measures against chronic diseases.

The rising number of Malaysians with stronger health awareness helped to boost growth in consumer health in 2017. While the value growth of OTC remained steady, stronger demand for vitamins and dietary supplements witnessed in Malaysia helped to boost value growth in 2017. For instance, consumers opt for fish oils/omega fatty acids that help optimise heart health. The changing lifestyle of Malaysians such as high exposure to technological devices like mobile phones has also aggravated demand for eye health supplements as consumers take them as preventive measures to protect their eyes. In addition, stronger growth in weight management and wellbeing categories such as supplement nutrition drinks has also been boosted by consumers' increasing awareness of complete nutrition intake to optimise health and wellness.

### **The competitive landscape in Malaysia is highly fragmented**

Consumer health in Malaysia comprises many international and domestic companies. While international manufacturers like Amway, Nu Skin, Suntory, USANA and GlaxoSmithKline continue to show extraordinary sales performances, local players like HerbalCeutical, Berjaya, Elken and CCM show sustainable competitiveness against international players with wide brand portfolios marketed nationwide. Direct selling brands like Amway and USANA retain strong shares in Malaysia through strong distribution networks with reputable brand images established.

To survive in the highly competitive environment, many vitamins and dietary supplements brands like Bio-Life, Blackmores, VitaHealth and Live-well continue to launch bundle promotional packs to attract more sales. Price wars between players continue to play a vital role in attracting customers to brands in vitamins and dietary supplements as well as sports nutrition and weight management and wellbeing. However, price competition between OTC range manufacturers is less crucial since consumers perceive it to be urgent and are less sensitive to pricing when they seek self-medication.

### **Store-based retailing dominates consumer health**

Drugstores/parapharmacies like Guardian, Caring Pharmacy and Big Pharmacy continue to lead distribution sales in consumer health. Malaysians manage to purchase most of their consumer health products, including OTC ranges and vitamins and dietary supplements, from these outlets. Health and beauty specialist retailers such as Watsons remain a strong distribution channel for consumer health ranges such as sports nutrition, OTC, and weight management and wellbeing.

In 2017, the distribution share of internet retailing continued to rise as consumers showed more interest in purchasing sports nutrition, vitamins and dietary supplements and weight management and wellbeing products through online media such as 11th Street and the online websites of leading pharmacies like Guardian, Caring Pharmacy and Watsons. The direct selling network contributes a significant share in vitamins and dietary supplements, and weight management and wellbeing in Malaysia. Leading direct selling players like Amway, Nu Skin, USANA and Shaklee have gained a strong distribution share through sales generated by their active members' network.

### **Slow positive outlook forecast**

Malaysia encountered a slowdown in economic growth in 2017 with softening consumer sentiment. Households in Malaysia are facing a spiking cost of living, a volatile currency exchange rate and, hence, a stronger financial burden. A rising number of consumers have lower budgets to spend on consumer health categories such as vitamins and dietary supplements. In conjunction with weakening consumer sentiment, more Malaysians will purchase vitamins and dietary supplements during sales and promotional periods to save money. Sales of vitamins and dietary supplements made during promotional periods slow down the value growth of consumer health since prices are cheaper compared to normal.

Consumer health in Malaysia is forecast relatively conservative growth. Multinational corporations and giant domestic conglomerates are expected to provide corporate health insurance medical cards as part of remuneration packages. The cards basically cover outpatient visits by employees and their immediate family members (spouse and children) to general practitioners and inpatient facilities including hospitalisation. This, in turn, helps to minimise the cost incurred in self-medication as general practitioners will prescribe and have the medication disbursed from the clinics. Therefore, a rising number of consumers in Malaysia who fall sick tend to visit general practitioners instead of taking the initiative to visit pharmacies to purchase from the OTC range.

## Market indicators

**Table 1 Consumer Expenditure on Health Goods and Medical Services: Value 2012-2017**

MYR million	2012	2013	2014	2015	2016	2017
Pharmaceuticals, medical appliances/equipment	7,885.5	8,856.8	9,890.7	10,962.0	11,967.4	13,326.4
Outpatient services	2,816.1	3,135.1	3,473.2	3,821.3	4,144.3	4,590.0
Hospital services	1,586.4	1,755.1	1,933.1	2,115.6	2,283.3	2,525.7
Total	12,288.0	13,747.0	15,297.0	16,899.0	18,395.0	20,442.1

**Table 2 Life Expectancy at Birth 2012-2017**

years	2012	2013	2014	2015	2016	2017
Males	72.5	72.7	72.8	73.0	73.2	73.3
Females	77.0	77.2	77.4	77.5	77.7	77.9

**Table 3 Sales of Consumer Health by Category: Value 2012-2017**

MYR million	2012	2013	2014	2015	2016	2017
OTC	698.7	725.4	760.9	801.0	841.4	883.5
Sports Nutrition	10.4	10.8	11.4	12.2	12.9	13.7
Vitamins and Dietary Supplements	1,608.9	1,714.1	1,848.3	2,014.0	2,197.4	2,402.9
Weight Management and Wellbeing	832.5	857.6	794.1	776.3	780.5	788.0
Herbal/Traditional Products	942.7	999.5	1,073.6	1,153.4	1,236.4	1,333.7
Allergy Care	13.2	13.7	14.3	15.0	15.7	16.3
Paediatric Consumer Health	66.0	69.1	73.5	78.9	85.1	91.9
Consumer Health	3,150.4	3,307.9	3,414.6	3,603.5	3,832.2	4,088.1

Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing. Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements. Note 3: 2017 data is provisional and based on part-year estimates.

**Table 4 Sales of Consumer Health by Category: % Value Growth 2012-2017**

% current value growth	2016/17	2012-17 CAGR	2012/17 Total
OTC	5.0	4.8	26.4
Sports Nutrition	5.9	5.7	31.6
Vitamins and Dietary Supplements	9.4	8.4	49.4
Weight Management and Wellbeing	1.0	-1.1	-5.3
Herbal/Traditional Products	7.9	7.2	41.5
Allergy Care	4.0	4.3	23.3
Paediatric Consumer Health	8.0	6.8	39.2
Consumer Health	6.7	5.3	29.8

Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing. Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements. Note 3: 2017 data is provisional and based on part-year estimates.

**Table 5 NBO Company Shares of Consumer Health: % Value 2013-2017**

% retail value rsp	2013	2014	2015	2016	2017
Amway (M) Sdn Bhd	10.3	10.6	10.6	10.6	10.5
Nu Skin (M) Sdn Bhd	6.6	7.2	7.2	6.9	6.4
Cerebos Sdn Bhd	4.4	5.0	5.4	5.8	6.3
USANA Health Sciences Sdn Bhd	4.2	4.5	4.6	4.5	4.4
GlaxoSmithKline Consumer Healthcare Sdn Bhd	4.4	4.5	4.3	4.2	4.2
HerbalCeutical Sdn Bhd	2.5	2.9	3.1	3.2	3.4
Herbalife Products (M) Sdn Bhd	10.9	6.8	4.7	3.9	3.0
Cosway (M) Sdn Bhd	3.2	3.2	3.2	3.1	2.9
Elken Sdn Bhd	2.7	2.7	2.7	2.7	2.6
VitaHealth Asia Pacific (S) Pte Ltd	2.2	2.3	2.3	2.4	2.4



% retail value rsp	2013	2014	2015	2016	2017
Blackmores (M) Sdn Bhd	2.0	2.1	2.1	2.2	2.3
TR Networks (M) Sdn Bhd	1.3	1.6	1.7	1.9	2.1
Reckitt Benckiser (M) Sdn Bhd	1.7	1.8	1.8	1.8	1.8
21st Century Products Sdn Bhd	2.0	2.1	2.1	2.1	1.8
Bio-Life Marketing (M) Sdn Bhd	1.6	1.6	1.7	1.7	1.8
CCM Pharmaceuticals Sdn Bhd	1.6	1.6	1.6	1.6	1.5
Boehringer Ingelheim (M) Sdn Bhd	1.3	1.4	1.4	1.4	1.4
Total Image Regional (M) Sdn Bhd	1.2	1.3	1.4	1.4	1.4
Kordel's Ltd	1.2	1.3	1.3	1.3	1.3
Abbott Laboratories (M) Sdn Bhd	1.1	1.1	1.1	1.2	1.2
Bayer (M) Sdn Bhd	1.1	1.2	1.2	1.2	1.2
Lofthouse of Fleetwood Ltd	1.2	1.2	1.2	1.2	1.2
Nutra-Life Health & Fitness (NZ) Ltd	1.0	1.0	1.0	1.0	1.0
Ricola Asia Pacific Pte Ltd	1.1	1.1	1.1	1.0	1.0
Haw Par Healthcare Ltd	0.9	0.9	0.9	0.9	0.9
Yomeishu Seizo Co Ltd	0.7	0.7	0.8	0.8	0.7
Forever Living Products (M) Sdn Bhd	0.8	0.8	0.8	0.8	0.7
Kotra Industries Bhd	0.6	0.6	0.6	0.7	0.7
Pfizer (M) Sdn Bhd	0.6	0.6	0.6	0.6	0.6
CNI Enterprise (M) Sdn Bhd	0.9	0.8	0.8	0.7	0.6
Others	24.8	25.6	26.5	27.2	28.5
Total	100.0	100.0	100.0	100.0	100.0

**Table 6 LBN Brand Shares of Consumer Health: % Value 2014-2017**

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Nutrillite (Amway Corp)	Amway (M) Sdn Bhd	9.4	9.5	9.5	9.5
Pharmanex (Nu Skin Enterprises Inc)	Nu Skin (M) Sdn Bhd	7.2	7.2	6.9	6.4
Brand's (Suntory Holdings Ltd)	Cerebos Sdn Bhd	5.0	5.4	5.8	6.3
USANA (USANA Health Sciences Inc)	USANA Health Sciences Sdn Bhd	3.6	3.7	3.7	3.7
Herbalife (Herbalife Ltd)	Herbalife Products (M) Sdn Bhd	6.8	4.7	3.9	3.0
Panadol (GlaxoSmithKline Plc)	GlaxoSmithKline Consumer Healthcare Sdn Bhd	3.0	3.0	3.0	3.0
Cosway (Berjaya Corp Bhd)	Cosway (M) Sdn Bhd	3.1	3.1	3.0	2.9
Elken	Elken Sdn Bhd	2.6	2.6	2.5	2.5
VitaHealth (Vita Life Sciences Ltd)	VitaHealth Asia Pacific (S) Pte Ltd	2.3	2.3	2.3	2.3
Blackmores (Blackmores Ltd)	Blackmores (M) Sdn Bhd	2.1	2.1	2.2	2.3
Kinohimitsu (Kino Biotech Co Ltd)	TR Networks (M) Sdn Bhd	1.6	1.7	1.9	2.1
NH Detoxlim	HerbalCeutical Sdn Bhd	1.9	2.0	2.0	2.0
21st Century (21st Century Laboratories Inc)	21st Century Products Sdn Bhd	2.1	2.1	2.1	1.8
Bio-Life (Bio-Life (S) Pte Ltd)	Bio-Life Marketing (M) Sdn Bhd	1.6	1.7	1.7	1.8
Total Image	Total Image Regional (M) Sdn Bhd	1.3	1.4	1.4	1.4
NH Colla Plus	HerbalCeutical Sdn Bhd	1.0	1.1	1.2	1.4
Kordel's (Bionor Pharma ASA)	Kordel's Ltd	1.3	1.3	1.3	1.3
Pharmaton (Sanofi)	Boehringer Ingelheim (M) Sdn Bhd	-	-	-	1.3
Fisherman's Friend	Lofthouse of Fleetwood Ltd	1.2	1.2	1.2	1.2

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Nutra-life (Vitaco Health Ltd)	Nutra-Life Health & Fitness (NZ) Ltd	1.0	1.0	1.0	1.0
BodyKey by Nutrilite (Amway Corp)	Amway (M) Sdn Bhd	1.2	1.1	1.1	1.0
Ricola (Ricola AG)	Ricola Asia Pacific Pte Ltd	1.1	1.1	1.0	1.0
Redoxon (Bayer AG)	Bayer (M) Sdn Bhd	0.7	0.7	0.7	0.8
Strepsils (Reckitt Benckiser Group Plc (RB))	Reckitt Benckiser (M) Sdn Bhd	0.7	0.7	0.7	0.8
Yomeishu	Yomeishu Seizo Co Ltd	0.7	0.8	0.8	0.7
Nutrimeal (USANA Health Sciences Inc)	USANA Health Sciences Sdn Bhd	0.9	0.9	0.8	0.7
Tiger Balm (Haw Par Corp Ltd)	Haw Par Healthcare Ltd	0.7	0.7	0.7	0.7
Forever Living (Forever Living Products International LLC)	Forever Living Products (M) Sdn Bhd	0.8	0.8	0.8	0.7
Scott's (GlaxoSmithKline Plc)	GlaxoSmithKline Consumer Healthcare Sdn Bhd	0.6	0.6	0.6	0.6
Pristin	Total Health Concept Sdn Bhd	0.5	0.6	0.6	0.6
Pharmaton (Boehringer Ingelheim GmbH)	Boehringer Ingelheim (M) Sdn Bhd	1.3	1.3	1.3	-
Others	Others	32.8	33.6	34.0	35.2
Total	Total	100.0	100.0	100.0	100.0

**Table 7 Distribution of Consumer Health by Format: % Value 2012-2017**

% retail value rsp	2012	2013	2014	2015	2016	2017
Store-Based Retailing	56.8	57.5	60.0	60.8	62.0	62.6
- Grocery Retailers	7.5	7.6	7.8	7.7	7.6	7.4
-- Modern Grocery Retailers	7.4	7.5	7.7	7.6	7.5	7.3
--- Convenience Stores	0.0	0.0	0.0	0.0	0.0	0.0
--- Discounters	0.0	0.0	0.0	0.0	0.0	0.0
--- Forecourt Retailers	0.0	0.0	0.0	0.0	0.0	0.0
--- Hypermarkets	5.7	5.7	5.9	5.9	5.8	5.7
--- Supermarkets	1.7	1.8	1.7	1.7	1.6	1.6
-- Traditional Grocery Retailers	0.1	0.1	0.1	0.1	0.1	0.1
--- Food/drink/tobacco specialists	0.0	0.0	0.0	0.0	0.0	0.0
--- Independent Small Grocers	0.1	0.1	0.1	0.1	0.1	0.1
--- Other Grocery Retailers	0.0	0.0	0.0	0.0	0.0	0.0
---- Healthfood shops	0.0	0.0	0.0	0.0	0.0	0.0
---- Other Other Grocery Retailers	0.0	0.0	0.0	0.0	0.0	0.0
- Mixed Retailers	0.0	0.0	0.0	0.0	0.0	0.0
-- Department Stores	0.0	0.0	0.0	0.0	0.0	0.0
-- Mass Merchandisers	0.0	0.0	0.0	0.0	0.0	0.0
-- Variety Stores	0.0	0.0	0.0	0.0	0.0	0.0
-- Warehouse Clubs	0.0	0.0	0.0	0.0	0.0	0.0
- Non-Grocery Specialists	49.3	49.9	52.2	53.1	54.5	55.2
-- Health and Beauty Specialist Retailers	49.3	49.9	52.2	53.1	54.5	55.2
--- Beauty Specialist Retailers	0.0	0.0	0.0	0.0	0.0	0.0
--- Chemists/Pharmacies	11.9	11.2	11.2	11.4	11.5	11.6
--- Optical Goods Stores	0.0	0.0	0.0	0.0	0.0	0.0

% retail value rsp	2012	2013	2014	2015	2016	2017
--- Drugstores/parapharmacies	33.3	34.7	36.8	37.4	38.6	39.2
--- Other Healthcare Specialist Retailers	4.1	4.0	4.2	4.3	4.3	4.4
-- Other Non-Grocery Specialists	0.0	0.0	0.0	0.0	0.0	0.0
Non-Store Retailing	43.2	42.5	40.0	39.2	38.0	37.4
- Vending	0.0	0.0	0.0	0.0	0.0	0.0
- Homeshopping	0.0	0.0	0.0	0.0	0.0	0.0
- Internet Retailing	0.9	1.0	1.1	1.1	1.3	1.4
- Direct Selling	42.3	41.5	38.9	38.0	36.7	36.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

**Table 8 Distribution of Consumer Health by Format and Category: % Value 2017**

% retail value rsp	OTC	SN	VDS	WMW	HTP	AC	PCH
Store-Based Retailing	99.8	77.3	56.2	40.3	69.4	100.0	68.8
- Grocery Retailers	21.3	0.0	2.5	6.9	10.2	32.3	7.0
-- Modern Grocery Retailers	20.7	0.0	2.5	6.9	10.0	31.3	7.0
--- Convenience Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
--- Discounters	0.0	0.0	0.0	0.0	0.0	0.0	0.0
--- Forecourt Retailers	0.0	0.0	0.0	0.0	0.0	0.0	0.0
--- Hypermarkets	16.3	0.0	2.1	4.9	7.9	24.5	5.6
--- Supermarkets	4.4	0.0	0.4	2.0	2.1	6.8	1.4
-- Traditional Grocery Retailers	0.6	0.0	0.0	0.0	0.3	0.9	0.1
--- Food/drink/tobacco specialists	0.0	0.0	0.0	0.0	0.0	0.0	0.0
--- Independent Small Grocers	0.6	0.0	0.0	0.0	0.3	0.9	0.1
--- Other Grocery Retailers	0.0	0.0	0.0	0.0	0.0	0.0	0.0
---- Healthfood shops	0.0	0.0	0.0	0.0	0.0	0.0	0.0
---- Other Other Grocery Retailers	0.0	0.0	0.0	0.0	0.0	0.0	0.0
- Mixed Retailers	0.0	0.0	0.0	0.0	0.0	0.0	0.0
-- Department Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
-- Mass Merchandisers	0.0	0.0	0.0	0.0	0.0	0.0	0.0
-- Variety Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
-- Warehouse Clubs	0.0	0.0	0.0	0.0	0.0	0.0	0.0
- Non-Grocery Specialists	78.5	77.3	53.7	33.4	59.2	67.7	61.7
-- Health and Beauty Specialist Retailers	78.5	77.3	53.7	33.4	59.2	67.7	61.7
--- Beauty Specialist Retailers	0.0	0.0	0.0	0.0	0.0	0.0	0.0
--- Chemists/Pharmacies	27.8	6.4	8.1	4.2	10.8	22.8	17.0
--- Optical Goods Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0

% retail value rsp	OTC	SN	VDS	WMW	HTP	AC	PCH
--- Drugstores/parapharmacies	50.7	18.1	39.2	26.7	44.0	45.0	40.2
--- Other Healthcare Specialist Retailers	0.0	52.8	6.4	2.5	4.5	0.0	4.5
-- Other Non-Grocery Specialists	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Non-Store Retailing	0.2	22.7	43.8	59.7	30.6	0.0	31.2
- Vending	0.0	0.0	0.0	0.0	0.0	0.0	0.0
- Homeshopping	0.0	0.0	0.0	0.0	0.0	0.0	0.0
- Internet Retailing	0.0	22.7	1.8	1.1	1.3	0.0	1.3
- Direct Selling	0.2	0.0	42.0	58.6	29.3	0.0	30.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Key: OTC = over the counter; SN = sports nutrition; VDS = vitamins and dietary supplements; WMW = weight management and wellbeing; HTP = herbal/traditional products; AC = Allergy Care; PCH = paediatric consumer health

**Table 9 Forecast Sales of Consumer Health by Category: Value 2017-2022**

MYR million	2017	2018	2019	2020	2021	2022
OTC	883.5	891.4	905.9	919.9	933.1	945.8
Sports Nutrition	13.7	13.9	14.2	14.4	14.6	14.8
Vitamins and Dietary Supplements	2,402.9	2,451.9	2,546.8	2,634.6	2,713.8	2,786.1
Weight Management and Wellbeing	788.0	836.3	855.1	873.0	890.1	906.2
Herbal/Traditional Products	1,333.7	1,361.4	1,403.6	1,443.3	1,479.9	1,511.8
Allergy Care	16.3	16.5	16.7	16.9	17.1	17.2
Paediatric Consumer Health	91.9	91.9	94.2	96.4	98.3	100.1
Consumer Health	4,088.1	4,193.4	4,322.0	4,441.9	4,551.6	4,653.0

Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing. Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements. Note 3: 2017 data is provisional and based on part-year estimates.

**Table 10 Forecast Sales of Consumer Health by Category: % Value Growth 2017-2022**

% constant value growth	2017/2018	2017-22 CAGR	2017/22 Total
OTC	0.9	1.4	7.1
Sports Nutrition	1.4	1.6	8.5
Vitamins and Dietary Supplements	2.0	3.0	15.9
Weight Management and Wellbeing	6.1	2.8	15.0
Herbal/Traditional Products	2.1	2.5	13.4
Allergy Care	1.4	1.1	5.8
Paediatric Consumer Health	0.0	1.7	9.0
Consumer Health	2.6	2.6	13.8

Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing. Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements. Note 3: 2017 data is provisional and based on part-year estimates.

## Appendix

### OTC registration and classification

- OTC in Malaysia is regulated by the National Pharmaceutical Regulatory Agency (NPRA). NPRA controls classification, approval and categorisation of OTC drugs nationwide. OTC drugs manufactured locally and internationally need to seek approval through registration with the National Pharmaceutical Control Bureau (NPCB) prior to marketing in Malaysia. The Drugs Registration Guidance Document (DRGD) serves as a guideline for the drug registration process including quality control, licensing, inspection and post-registration activities. The Drug Control Authority is an executive body established under the Control of Drugs and Cosmetics Regulations in 1984. The organisation's responsibility is to ensure the safety and quality of pharmaceuticals, and health and personal care products marketed within Malaysia.
- The advertisement of OTC drugs is governed by the Medicines (Advertisement and Sale) Act 1956 (Act 290). In addition, the Pharmaceutical Association of Malaysia (PhAMA) has also drawn up a code of conduct for the marketing and promotion requirement for non-prescription OTC ranges in Malaysia. Advertisements of OTC products must be factually true and not mislead consumers. No exaggerated claim, whether in direct or implied form, can be contained within the advertisement. The advertisement of OTC must not discourage consumers from seeking professional advice nor claim to cure any ailment or disease.
- Packaging guidance for OTC ranges in Malaysia is set out clearly within the DRGD. In 2017, a new guideline was implemented in the DRGD for all repackagers of OTC ranges to acquire a Good Manufacturing Practice (GMP) certificate in Malaysia. Child-lock closures are usually



used for OTC products like paediatric acetaminophen. This is to eliminate the risk of children taking these medications without adult supervision.

- Labelling requirements for OTC drugs remain the same without significant changes. Essential information such as product name, dosage, manufacturer's name, manufacturing date and product registration number are still required to be printed on packaging labels on OTC products in Malaysia. Claims likely to mislead consumers and product comparison are strictly prohibited on labels for OTC products. In 2017, a specific labelling requirement was put in place for OTC products containing *Melaleuca leucadendra* (Cajeput oil). A warning is required to be included by external OTC drugs containing *Melaleuca leucadendra*, stating, "This product should not be applied to the facial area, in particular around the nose of infants and small children. It might cause breathing problem/shortness of breath."
- OTC in Malaysia is permitted for distribution through retail channels like drugstores/parapharmacies such as Guardian or Caring Pharmacy. In addition, health and beauty specialist retailers such as Watsons also distribute wide variants of OTC in Malaysia. Under the regulation of NPRA, disbursements of behind the counter (BTC) ranges require the presence of certified pharmacists stationed in the retail outlets. Other than that, OTC is also marketed widely in traditional medicine halls, convenience stores like 7-Eleven, supermarkets and hypermarkets as well as independent small grocers.

#### **Vitamins and dietary supplements registration and classification**

- Vitamins and dietary supplements continue to be regulated by the Drug Control Authority. Division of control in health supplements in Malaysia is still affected by the percentage of food base contained within vitamins and dietary supplements. If products contain less than 80% food ingredients and more than 20% active ingredients regulated by NPRA, such products are regulated by NPRA. If a vitamins and dietary supplements product contains 80% or more food ingredients with less than 20% biologically-active ingredients regulated by NPRA, the vitamins and dietary supplements product is regulated under the Food Safety and Quality Division of the Ministry of Health Malaysia. Registration of vitamins and dietary supplements with NPRA must comply with Current Good Manufacturing Practice (cGMP) requirements.
- Combination vitamins and dietary supplements are still governed by the Drug Registration Guidance Document (NRGD) in Malaysia. A list of active ingredients with maximum daily levels permitted in health supplements is available within NRGD for consumer health players in Malaysia. Vitamin K (both K1 and K2) is restricted only for combinations with other vitamins and minerals in oral preparations. This implies that vitamin K as a single ingredient in oral preparations is not allowed. In addition, any form of fluoride as an ingredient is not permitted in the formulation of any vitamins and dietary supplements.
- The advertisement of vitamins and dietary supplements in Malaysia is regulated by the Medicines (Advertisement and Sale) Act 1956 which prohibits manufacturers from using any claims with potential to mislead consumers. 20 disease names, such as diabetes, paralysis and cancer, listed in the Medicines (Advertisement and Sale) Act 1956 (Revised 1983) are prohibited to be used within advertisements of vitamins and dietary supplements. Functional claims of vitamins and dietary supplements must adhere to the types of claims listed in NRGD under different priorities. The types of claims available for vitamins and dietary supplements are general or nutritional claims, functional claims and disease risk reduction claims.

- The maximum pack size allowed for tablets, pills and capsules among vitamins and dietary supplements is based on the daily dosing not exceeding six months' usage. The maximum pack size allowed for disease risk reduction claim vitamins and dietary supplements is only one month's supply unless justified. vitamins and dietary supplements products with the dosage form of soft gel with tail (twist and squeeze) must be packaged with childproof screw cap closures. Information on the pack size, fill details by weight or volume or quantity, container type, barcode or serial number for vitamins and dietary supplements must be listed clearly on the exterior of the packaging.
- Requirements for labelling of vitamins and dietary supplements products in Malaysia are governed by general labelling requirements, the Consumer Medication Information Leaflet (RiMUP) and specific labelling requirements. Substances requiring specific labelling requirements are alfalfa, arginine and royal jelly. Additional labelling is required for products containing ingredients of animal origin(s) and manufacturers are required to include the statement, "This product contains substance(s) from animal origin." Important information such as the product name, manufacturer, batch number, indication, and dose/usage instructions must be included on labels of vitamins and dietary supplements.
- Vitamins and dietary supplements in Malaysia are distributed across major online and offline retail channels. Drugstores/parapharmacies, such as Caring Pharmacy and Multicare Pharmacy, and health and beauty specialist retailers such as Watsons and AEON Wellness are common retail outlets where Malaysians shop for vitamins and dietary supplements. Wide varieties of vitamins and dietary supplements products sold across these networks comprise brands like Eurobio, Naturalle, Bio-Life, VitaHealth and Blackmores. In addition, vitamins and dietary supplements are also distributed significantly by direct selling networks like Amway, USANA and Shaklee.

#### **Self-medication/self-care and preventive medicine**

- The Malaysian government does not intervene in encouraging consumers to go for self-diagnosing or treating minor ailments at home. Consumers in Malaysia are pampered by a wide range of OTC drugs across various retail networks. This has, in turn, helped to educate consumers on the engagement of self-care and self-medication to treat minor ailments at home.

# Dietary Supplements in Malaysia

## HEADLINES

- In 2017, sales of dietary supplements post 7% current value growth to reach MYR1.3 billion
- Continuous launches of new dietary supplements boost demand in 2017
- Probiotic supplements sees the highest current value growth in 2017 with 18%
- Amway (M) Sdn Bhd continues to lead dietary supplements in 2017 with an 18% value share
- Dietary supplements to record a 2% CAGR at constant 2017 prices over the forecast period to reach MYR1.5 billion in 2022

## Prospects

### **Health consciousness is a major factor driving growth in dietary supplements**

Malaysians are becoming highly health-conscious due to the alarming rocketing non-communicable diseases (NCDs) rate. With slower economic conditions, more consumers turn to combination dietary supplements which are more cost-efficient. Consumers also find it more convenient to consume combination instead of single dietary supplements. Combination dietary supplements have been launched by various manufacturers to target consumers with cost concerns. They also offer more benefits and proven functional claims help to gain stronger confidence among consumers.

Growing health consciousness is anticipated among Malaysians over the forecast period.

Government and non-governmental organisations will collaborate to educate consumers on the risks and prevention of NCDs. Greater knowledge on maintaining health or preventing chronic diseases is expected to benefit the growth of dietary supplements.

### **Malaysians strongly demand supplements for heart, bone and joint health**

A 2015 Statistics Department study revealed heart disease to be Malaysians' principle cause of death in 2005-2014 (14% of deaths among the population aged 15-64). This has caused more Malaysians to take preventive measures to maintain heart health. Thus, demand for fish oils and ginkgo biloba led to continued significant value growth in 2017. Besides salmon oil, commonly sold in Malaysia, krill oil was introduced during the review period by multiple brands, such as Surbex Krill Oil, Nature's Way Red Krill Oil, Kordel's Krill-Xanthin and Natural Factors Krill Oil. Dietary supplements for heart health are anticipated to see stronger demand during the forecast period due to the alarming rate of heart-related chronic disease leading to higher consumer awareness of maintaining heart health.

Therefore, dietary supplements targeting the improvement of heart health, such as fish oils and ginkgo biloba, will continue to show stronger presence in Malaysia with the emergence of many new brands.

Dietary supplements for bone and joint health have also encountered strong demand from Malaysian consumers. The ageing of the population leads to osteoarthritis and joint pain. Therefore, more Malaysians tend to consume dietary supplements like glucosamine and calcium to maintain bone and joint health. New ingredients like hyaluronic acid with collagen have been introduced through brands like Kordel's Hyaluronic Acid with Type II Collagen for consumers with joint pain or those who wish to prevent joint-related issues. Over the forecast period, hyaluronic acid is expected to emerge as an

important dietary supplement substitution for glucosamine to help optimise joint health. However, demand for glucosamine and calcium supplements for joint and bone health is expected to remain steady since consumers have confidence in the benefits provided.

### **Beauty tonics gain Malaysians' attention**

Tonics continued to post significant value growth in Malaysia during 2017. The growth of beauty-positioned tonics remained solid in 2017 due to new launches by brands like Kinohimitsu, Blackmores and Kordel's. Blackmores Beauty Vital Shine is formulated with He Shou Wu (Fo-Ti) root as a main ingredient used to maintain hair health. Collagen tonic drinks targeting men have emerged in Malaysia with the launch of Progym's Shinzui Men Collagen Regeneration Drink. The product claims to control skin sebum through the content of Mangoselect, a type of mangosteen extract, and to be antioxidant and muscle-building through the content of L-Carnitine. Hydrolysed marine collagen in the products is claimed to help firm skin and tighten pores. Progym's Men Collagen is a men's beauty tonic drink followed by the launch of Kinohimitsu J'Pan Collagen Men Drink.

Many tonics players are expected to switch focus from women to men when launching new products during forecast period. A growing number of beauty-positioned tonics targeting men are predicted to be launched by various tonics players, due to male consumers' rising interest in beauty-positioned tonics. Collagen tonic drinks are anticipated to be the most popular.

## **Competitive landscape**

### **Dietary supplements in Malaysia is extremely diffuse**

Dietary supplements in Malaysia is highly fragmented. It is primarily led by international players like Amway, USANA, Elken, and Cosway, major direct selling companies. In Malaysia, direct sellers are top-ranking companies due to strong distribution established through member networks. Non-direct selling multinational companies like VitaHealth, Bio-Life, Blackmores, Kordel's, and 21st Century also demonstrate significant shares in dietary supplements.

### **Domestic players with an increasing presence**

Domestic manufacturers like Biogrow Health, CCM Pharmaceuticals, Kotra Industries Bhd and Medipharm Industries are showing increasing presence among dietary supplements in Malaysia. For example, Naturalle by CCM Pharmaceuticals and Eurobio by Medipharm were highly active with new dietary supplements launches during 2017.

### **Key marketing tools include innovation, new product launches and promotional bundle packs**

Continuous innovation and new product launches are key survival factors for dietary supplements players within Malaysia as the highly fragmented industry means they face strong competition from rivals. Promotional bundle packs offered by brands are also crucial in retaining share. Cost-conscious consumers look for promotional dietary supplements packs for the better value for money.

## Category data

### **Summary 1 Dietary Supplements: Brand Ranking by Positioning 2017**

Positioning	Brand ranking	Brand	GBO
Beauty	1	Total Image	Total Image Regional (M) Sdn Bhd
	2	Blackmores	Blackmores Ltd
	3	VitaHealth	Vita Life Sciences Ltd
Bone	1	Caltrate	Pfizer Inc
	2	Nutrilite	Amway Corp
	3	Cosway	Berjaya Corp Bhd
Digestive	1	Nutrilite	Amway Corp
	2	Bio-Life	Bio-Life (S) Pte Ltd
	3	Lacto-5	Holista Colltech
Eye Health	1	VitaHealth	Vita Life Sciences Ltd
	2	Naturalle	CCM Berhad
	3	Live-Well	Live-well Nutraceuticals (UK) Pte Ltd
General Health	1	Nutrilite	Amway Corp
	2	USANA	USANA Health Sciences Inc
	3	Elken	Elken Sdn Bhd
Heart Health	1	Pristin	Total Health Concept Sdn Bhd
	2	VitaHealth	Vita Life Sciences Ltd
	3	Nutrilite	Amway Corp

Positioning	Brand ranking	Brand	GBO
Immune System	1	Stay-well	Tishcon Corp
	2	Solaray	Nutraceutical International Corp
	3	USANA	USANA Health Sciences Inc
Joint	1	Nutrilite	Amway Corp
	2	Cosway	Berjaya Corp Bhd
	3	Artril	Advance Pharma GmbH
Memory Health	1	Cosway	Berjaya Corp Bhd
	2	VitaHealth	Vita Life Sciences Ltd
	3	Tanakan	Ipsen SA

**Table 1 Sales of Dietary Supplements by Category: Value 2012-2017**

MYR million	2012	2013	2014	2015	2016	2017
Combination Dietary Supplements	200.8	216.2	237.1	262.0	290.3	322.3
Herbal/Traditional Dietary Supplements	456.0	473.7	499.1	533.3	567.3	602.8
- Combination Herbal/Traditional Dietary Supplements	104.0	111.3	121.4	133.9	148.1	163.7
- Echinacea	1.1	1.2	1.2	1.3	1.3	1.3
- Evening Primrose Oil	42.7	44.2	46.0	48.5	51.1	53.5
- Garlic	21.0	21.2	21.5	22.3	22.9	23.4
- Ginkgo Biloba	43.8	44.5	46.0	48.4	51.2	54.3
- Ginseng	5.3	3.5	2.8	3.2	3.2	3.2
- St John's Wort	0.4	0.4	0.4	0.4	0.4	0.4
- Other Herbal/Traditional Dietary Supplements	237.6	247.3	259.8	275.3	289.1	302.7
-- Spirulina	107.0	110.2	115.1	121.2	126.1	130.8
-- Other Other Herbal/Traditional Dietary Supplements	130.6	137.1	144.7	154.1	163.0	172.0
Non-Herbal/Traditional Dietary Supplements	504.6	535.6	576.0	622.3	673.0	729.0
- Co-Enzyme Q10	14.4	15.6	17.1	18.8	20.9	23.2
- Combination Non-Herbal/Traditional Dietary Supplements	96.8	104.9	115.7	128.1	142.3	158.6
- Eye Health Supplements	3.6	3.9	4.4	5.0	5.6	6.3
- Fish Oils/Omega Fatty Acids	81.8	87.7	94.8	102.9	112.0	122.1
- Glucosamine	40.0	42.7	46.3	50.5	55.2	60.6
- Minerals	84.4	86.7	90.2	95.5	101.3	107.6
-- Calcium Supplements	44.3	46.0	48.5	52.1	56.3	61.0
-- Mineral Supplements	40.2	40.7	41.7	43.4	45.0	46.6
- Probiotic Supplements	6.9	7.8	9.0	10.5	12.4	14.6

MYR million	2012	2013	2014	2015	2016	2017
- Protein Supplements	109.0	116.6	126.1	135.6	145.1	154.7
- Other Non-Herbal/Traditional Dietary Supplements	67.7	69.8	72.5	75.4	78.3	81.3
-- Lecithin	29.8	30.6	31.6	32.4	33.1	33.6
-- Other Other Non-Herbal/Traditional Dietary Supplements	37.9	39.2	40.9	43.0	45.3	47.8
Dietary Supplements	960.5	1,009.3	1,075.1	1,155.6	1,240.3	1,331.8

**Table 2 Sales of Dietary Supplements by Category: % Value Growth 2012-2017**

% current value growth	2016/17	2012-17 CAGR	2012/17 Total
Combination Dietary Supplements	11.0	9.9	60.5
Herbal/Traditional Dietary Supplements	6.2	5.7	32.2
- Combination Herbal/Traditional Dietary Supplements	10.6	9.5	57.4
- Echinacea	3.0	3.7	19.9
- Evening Primrose Oil	4.8	4.6	25.3
- Garlic	2.4	2.2	11.3
- Ginkgo Biloba	6.0	4.4	24.1
- Ginseng	1.5	-9.3	-38.7
- St John's Wort	0.4	1.0	4.9
- Other Herbal/Traditional Dietary Supplements	4.7	5.0	27.4
-- Spirulina	3.7	4.1	22.2
-- Other Other Herbal/Traditional Dietary Supplements	5.5	5.7	31.7
Non-Herbal/Traditional Dietary Supplements	8.3	7.6	44.5
- Co-Enzyme Q10	11.4	10.0	61.3
- Combination Non-Herbal/Traditional Dietary Supplements	11.5	10.4	63.9



% current value growth	2016/17	2012-17 CAGR	2012/17 Total
- Eye Health Supplements	13.2	12.1	77.3
- Fish Oils/Omega Fatty Acids	9.0	8.3	49.3
- Glucosamine	9.8	8.7	51.4
- Minerals	6.3	5.0	27.5
-- Calcium Supplements	8.5	6.6	38.0
-- Mineral Supplements	3.5	3.0	16.0
- Probiotic Supplements	17.8	16.0	110.4
- Protein Supplements	6.6	7.3	41.9
- Other Non-Herbal/Traditional Dietary Supplements	3.8	3.7	20.1
-- Lecithin	1.5	2.4	12.5
-- Other Other Non-Herbal/Traditional Dietary Supplements	5.5	4.8	26.1
Dietary Supplements	7.4	6.8	38.7

**Table 3 Sales of Dietary Supplements by Positioning: % Value 2012-2017**

% retail value rsp	2012	2013	2014	2015	2016	2017
Beauty	1.4	1.5	1.7	1.8	2.0	2.3
Bone	4.6	4.6	4.5	4.5	4.5	4.6
Digestive	0.7	0.8	0.8	0.9	1.0	1.1
Eye Health	0.4	0.4	0.4	0.4	0.5	0.5
General Health	51.5	51.6	51.7	51.8	51.8	51.7
Heart Health	10.7	10.8	10.8	10.8	10.9	10.9
Immune System	6.0	6.0	6.0	6.0	6.0	6.1
Joint	4.2	4.2	4.3	4.4	4.5	4.6
Memory Health	5.9	5.8	5.7	5.6	5.7	5.8
Other Dietary Supplement Positioning	14.6	14.4	14.0	13.8	13.2	12.4
Total	100.0	100.0	100.0	100.0	100.0	100.0

**Table 4 Sales of Fish Oils/Omega Fatty Acids by Type: % Value 2012-2017**

% retail value rsp	2012	2013	2014	2015	2016	2017
Cod liver Oil	7.3	6.9	6.7	6.4	6.1	6.0
Other Marine-based Oils	74.6	74.9	75.2	75.5	75.8	76.1
Plant-based Oils	18.2	18.1	18.1	18.1	18.1	17.9
Total	100.0	100.0	100.0	100.0	100.0	100.0

**Table 5 NBO Company Shares of Dietary Supplements: % Value 2013-2017**

% retail value rsp	2013	2014	2015	2016	2017
Amway (M) Sdn Bhd	18.4	18.1	17.9	17.8	17.6
USANA Health Sciences Sdn Bhd	8.7	8.8	9.0	8.8	8.6
Elken Sdn Bhd	8.8	8.7	8.5	8.3	8.1
Cosway (M) Sdn Bhd	7.1	7.1	6.9	6.6	6.2
VitaHealth Asia Pacific (S) Pte Ltd	5.7	5.8	5.8	5.7	5.6
Bio-Life Marketing (M) Sdn Bhd	4.9	5.0	5.1	5.1	5.2
Blackmores (M) Sdn Bhd	3.7	3.8	3.7	3.7	3.8
Kordel's Ltd	3.4	3.4	3.4	3.4	3.4
Nu Skin (M) Sdn Bhd	3.9	3.9	3.7	3.5	3.2
Total Health Concept Sdn Bhd	1.8	1.8	1.8	1.9	1.9
21st Century Products Sdn Bhd	2.3	2.2	2.1	2.0	1.9
Herbalife Products (M) Sdn Bhd	4.5	3.5	2.1	1.8	1.5
CNI Enterprise (M) Sdn Bhd	2.1	2.0	1.8	1.7	1.5
Pfizer (M) Sdn Bhd	1.1	1.1	1.1	1.1	1.1
Forever Living Products (M) Sdn Bhd	1.3	1.2	1.2	1.1	1.1
Tishcon Corp	0.8	0.8	0.8	0.9	0.9
Merck (M) Sdn Bhd	0.8	0.8	0.8	0.8	0.8
Ipsen SA	0.5	0.5	0.5	0.5	0.4
GlaxoSmithKline Consumer Healthcare Sdn Bhd	0.4	0.4	0.4	0.4	0.4
Herbal Revival Sdn Bhd	0.3	0.3	0.3	0.3	0.3
Victoria House Sdn Bhd	0.3	0.3	0.3	0.3	0.3
Abbott Laboratories (M) Sdn Bhd	0.2	0.2	0.2	0.3	0.3
GSK Consumer Healthcare	-	-	0.3	0.3	0.2
Advance Pharma Sdn Bhd	0.2	0.2	0.2	0.2	0.2

% retail value rsp	2013	2014	2015	2016	2017
Holista Colltech	0.1	0.1	0.1	0.2	0.2
Solaray Inc	0.2	0.2	0.2	0.2	0.2
CCM Pharmaceuticals Sdn Bhd	0.2	0.2	0.2	0.2	0.2
Korea Ginseng Corp	0.1	0.1	0.2	0.2	0.1
Biogrow Health Sdn Bhd	0.1	0.1	0.1	0.1	0.1
Sun Pharmaceutical Industries Ltd	-	0.2	0.2	0.2	0.1
Novartis Corp (M) Sdn Bhd	0.3	0.3	-	-	-
Ranbaxy (M) Sdn Bhd	0.2	-	-	-	-
Others	17.5	18.9	21.0	22.6	24.2
Total	100.0	100.0	100.0	100.0	100.0

**Table 6 LBN Brand Shares of Dietary Supplements: % Value 2014-2017**

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Nutrilitte (Amway Corp)	Amway (M) Sdn Bhd	18.1	17.9	17.8	17.6
USANA (USANA Health Sciences Inc)	USANA Health Sciences Sdn Bhd	8.8	9.0	8.8	8.6
Elken	Elken Sdn Bhd	8.2	8.1	7.9	7.7
Cosway (Berjaya Corp Bhd)	Cosway (M) Sdn Bhd	7.1	6.9	6.6	6.2
VitaHealth (Vita Life Sciences Ltd)	VitaHealth Asia Pacific (S) Pte Ltd	5.6	5.6	5.5	5.5
Bio-Life (Bio-Life (S) Pte Ltd)	Bio-Life Marketing (M) Sdn Bhd	5.0	5.1	5.1	5.2
Blackmores (Blackmores Ltd)	Blackmores (M) Sdn Bhd	3.8	3.7	3.7	3.8
Kordel's (Bionor Pharma ASA)	Kordel's Ltd	3.4	3.4	3.4	3.4
Pharmanex (Nu Skin Enterprises Inc)	Nu Skin (M) Sdn Bhd	3.9	3.7	3.5	3.2
Pristin	Total Health Concept Sdn Bhd	1.7	1.8	1.8	1.9
21st Century (21st Century Laboratories Inc)	21st Century Products Sdn Bhd	2.2	2.1	2.0	1.9
Herbalife (Herbalife Ltd)	Herbalife Products (M) Sdn Bhd	3.5	2.1	1.8	1.5
CNI (Citra Nusa Insan Cemerlang PT)	CNI Enterprise (M) Sdn Bhd	1.8	1.7	1.5	1.3
Caltrate (Pfizer Inc)	Pfizer (M) Sdn Bhd	1.1	1.1	1.1	1.1
Forever Living (Forever Living Products International LLC)	Forever Living Products (M) Sdn Bhd	1.2	1.2	1.1	1.1
Stay-well	Tishcon Corp	0.8	0.8	0.9	0.9
Seven Seas (Merck KGaA)	Merck (M) Sdn Bhd	0.8	0.8	0.8	0.8
Win	Elken Sdn Bhd	0.5	0.5	0.5	0.5
Tanakan	Ipsen SA	0.5	0.5	0.5	0.4
Scott's (GlaxoSmithKline Plc)	GlaxoSmithKline Consumer Healthcare Sdn Bhd	0.4	0.4	0.4	0.4

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Thomson	Herbal Revival Sdn Bhd	0.3	0.3	0.3	0.3
GNC (General Nutrition Centers Inc)	Victoria House Sdn Bhd	0.3	0.3	0.3	0.3
Surbex (Abbott Laboratories Inc)	Abbott Laboratories (M) Sdn Bhd	0.2	0.2	0.3	0.3
Calcium Sandoz (GlaxoSmithKline Plc)	GSK Consumer Healthcare	-	0.3	0.3	0.2
Artril (Advance Pharma GmbH)	Advance Pharma Sdn Bhd	0.2	0.2	0.2	0.2
Lacto-5	Holista Colltech	0.1	0.1	0.2	0.2
Solaray (Nutraceutical International Corp)	Solaray Inc	0.2	0.2	0.2	0.2
Royal Ginkgo (Citra Nusa Insan Cemerlang PT)	CNI Enterprise (M) Sdn Bhd	0.2	0.2	0.2	0.1
Vitacal (Vita Life Sciences Ltd)	VitaHealth Asia Pacific (S) Pte Ltd	0.1	0.1	0.1	0.1
Cheong-Kwan-Jang (KT&G Corp)	Korea Ginseng Corp	0.1	0.2	0.2	0.1
Calcium Sandoz (Novartis AG)	Novartis Corp (M) Sdn Bhd	0.3	-	-	-
Others	Others	19.5	21.6	23.2	24.7
Total	Total	100.0	100.0	100.0	100.0

**Table 7 Forecast Sales of Dietary Supplements by Category: Value 2017-2022**

MYR million	2017	2018	2019	2020	2021	2022
Combination Dietary Supplements	322.3	327.2	341.9	356.2	369.8	382.7
Herbal/Traditional Dietary Supplements	602.8	609.2	622.5	635.1	646.6	657.2
- Combination Herbal/Traditional Dietary Supplements	163.7	165.9	173.0	179.9	186.4	192.5
- Echinacea	1.3	1.3	1.3	1.4	1.4	1.4
- Evening Primrose Oil	53.5	53.7	54.2	54.7	54.9	55.1
- Garlic	23.4	22.4	21.9	21.4	20.9	20.3
- Ginkgo Biloba	54.3	54.4	55.7	57.1	58.8	60.6
- Ginseng	3.2	3.3	3.3	3.3	3.3	3.3
- St John's Wort	0.4	0.4	0.4	0.4	0.4	0.4
- Other Herbal/Traditional Dietary Supplements	302.7	307.8	312.7	317.0	320.6	323.6
-- Spirulina	130.8	132.8	133.9	134.9	135.6	136.0
-- Other Other Herbal/Traditional Dietary Supplements	172.0	175.0	178.7	182.1	185.0	187.6
Non-Herbal/Traditional Dietary Supplements	729.0	745.0	772.2	797.8	821.8	845.3
- Co-Enzyme Q10	23.2	24.0	25.3	26.6	27.9	29.3
- Combination Non-Herbal/Traditional Dietary Supplements	158.6	161.3	168.9	176.3	183.4	190.2
- Eye Health Supplements	6.3	6.4	6.7	7.0	7.3	7.6
- Fish Oils/Omega Fatty Acids	122.1	128.5	135.3	141.8	148.2	154.4
- Glucosamine	60.6	62.9	66.7	70.8	75.4	80.6
- Minerals	107.6	104.7	105.2	105.4	105.4	105.3
-- Calcium Supplements	61.0	60.8	62.4	63.7	65.0	66.2
-- Mineral Supplements	46.6	43.9	42.8	41.6	40.4	39.1

MYR million	2017	2018	2019	2020	2021	2022
- Probiotic Supplements	14.6	13.9	14.4	14.9	15.4	15.8
- Protein Supplements	154.7	161.7	167.4	172.0	175.5	178.6
- Other Non-Herbal/Traditional Dietary Supplements	81.3	81.8	82.4	82.9	83.3	83.4
-- Lecithin	33.6	33.1	32.7	32.2	31.7	31.1
-- Other Other Non-Herbal/Traditional Dietary Supplements	47.8	48.6	49.7	50.7	51.6	52.4
Dietary Supplements	1,331.8	1,354.2	1,394.7	1,432.9	1,468.4	1,502.4

**Table 8 Forecast Sales of Dietary Supplements by Category: % Value Growth 2017-2022**

% constant value growth	2017/2018	2017-22 CAGR	2017/22 Total
Combination Dietary Supplements	1.5	3.5	18.8
Herbal/Traditional Dietary Supplements	1.1	1.7	9.0
- Combination Herbal/Traditional Dietary Supplements	1.3	3.3	17.6
- Echinacea	0.4	0.2	0.9
- Evening Primrose Oil	0.3	0.6	2.9
- Garlic	-4.3	-2.8	-13.4
- Ginkgo Biloba	0.1	2.2	11.6
- Ginseng	0.2	0.5	2.4
- St John's Wort	-2.7	-3.0	-14.2
- Other Herbal/Traditional Dietary Supplements	1.7	1.3	6.9
-- Spirulina	1.5	0.8	4.0
-- Other Other Herbal/Traditional Dietary Supplements	1.8	1.8	9.1
Non-Herbal/Traditional Dietary Supplements	2.2	3.0	15.9
- Co-Enzyme Q10	3.1	4.7	26.0



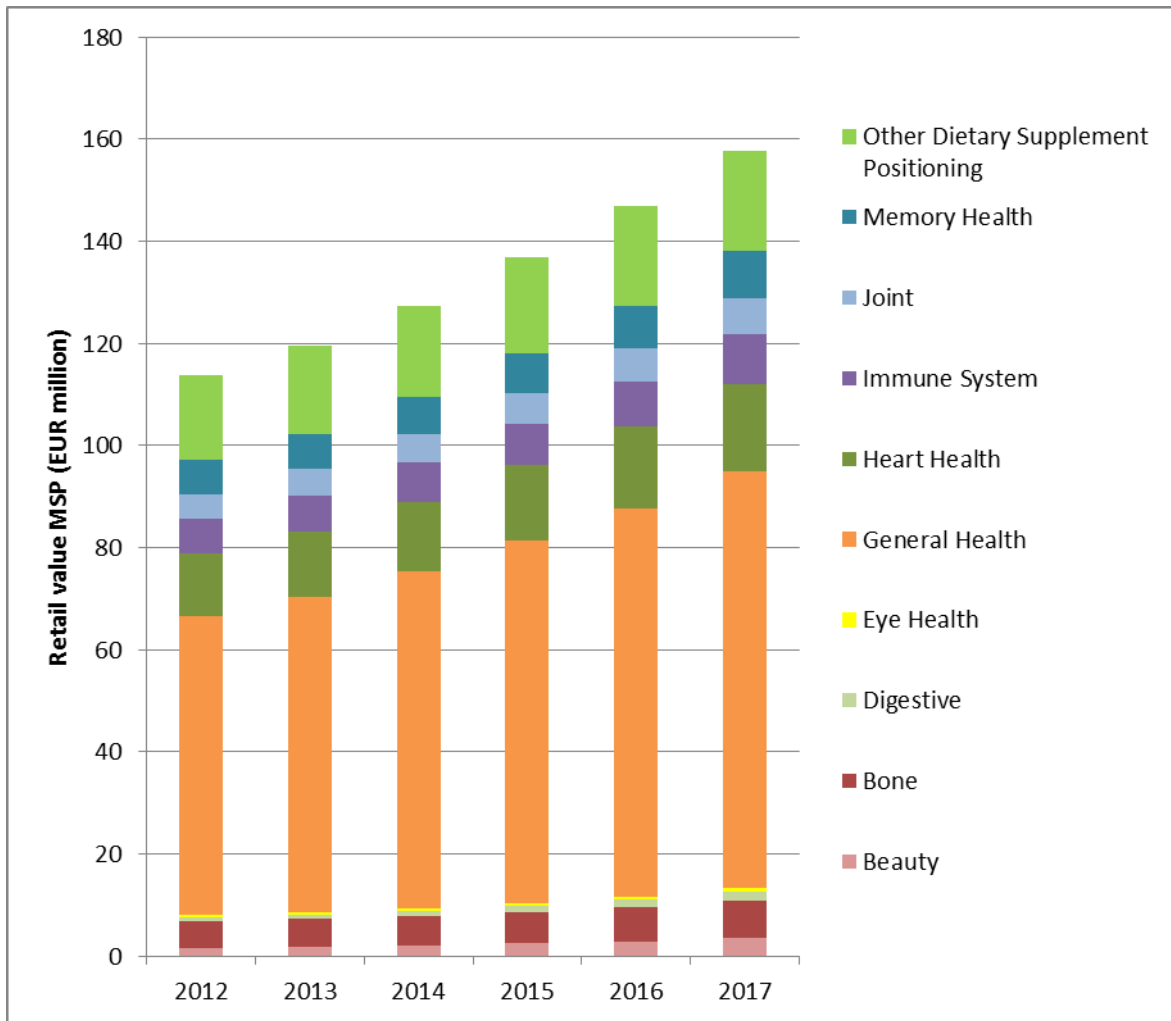
% constant value growth	2017/2018	2017-22 CAGR	2017/22 Total
- Combination Non-Herbal/Traditional Dietary Supplements	1.7	3.7	20.0
- Eye Health Supplements	0.7	3.8	20.7
- Fish Oils/Omega Fatty Acids	5.3	4.8	26.5
- Glucosamine	3.8	5.9	32.9
- Minerals	-2.7	-0.4	-2.2
-- Calcium Supplements	-0.3	1.6	8.4
-- Mineral Supplements	-5.9	-3.4	-16.1
- Probiotic Supplements	-4.7	1.7	8.6
- Protein Supplements	4.5	2.9	15.5
- Other Non-Herbal/Traditional Dietary Supplements	0.6	0.5	2.6
-- Lecithin	-1.2	-1.5	-7.4
-- Other Other Non-Herbal/Traditional Dietary Supplements	1.8	1.9	9.6
Dietary Supplements	1.7	2.4	12.8

**Table 9 Dietary Supplements by Positioning, percentage**

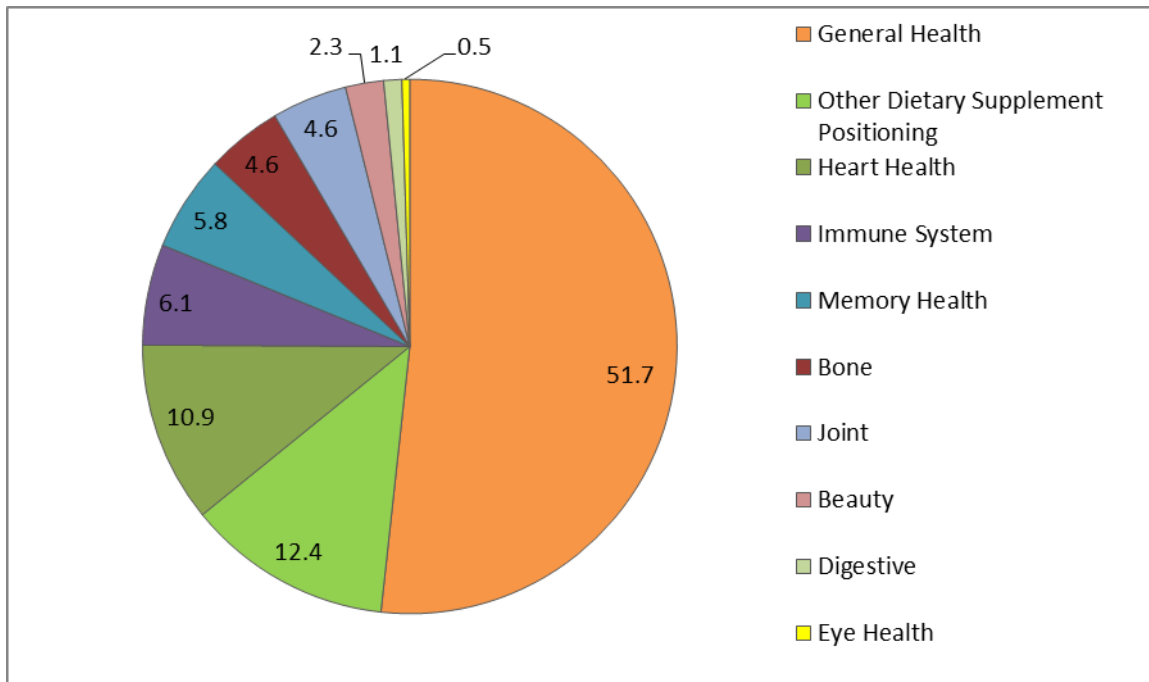
Dietary Supplements by Positioning	2012 (%)	2013 (%)	2014 (%)	2015 (%)	2016 (%)	2017 (%)
Beauty	1.4	1.5	1.7	1.8	2.0	2.3
Bone	4.6	4.6	4.5	4.5	4.5	4.6
Digestive	0.7	0.8	0.8	0.9	1.0	1.1
Eye Health	0.4	0.4	0.4	0.4	0.5	0.5
General Health	51.5	51.6	51.7	51.8	51.8	51.7
Heart Health	10.7	10.8	10.8	10.8	10.9	10.9
Immune System	6.0	6.0	6.0	6.0	6.0	6.1
Joint	4.2	4.2	4.3	4.4	4.5	4.6
Memory Health	5.9	5.8	5.7	5.6	5.7	5.8
Other Dietary Supplement Positioning	14.6	14.4	14.0	13.8	13.2	12.4
Total	100	100	100	100	100	100

**Table 10 Dietary Supplements by Positioning, Retail Value MSP in EUR million (Historic Current Prices, Year-on-Year Exchange Rates)**

Dietary Supplements by Positioning	2012	2013	2014	2015	2016	2017
Beauty	1.59	1.79	2.16	2.46	2.94	3.63
Bone	5.24	5.45	5.74	6.17	6.67	7.23
Digestive	0.82	0.93	1.07	1.25	1.47	1.73
Eye Health	0.42	0.47	0.52	0.59	0.66	0.75
General Health	58.59	61.61	65.79	70.85	76.01	81.56
Heart Health	12.17	12.89	13.77	14.83	15.98	17.24
Immune System	6.82	7.17	7.64	8.21	8.81	9.62
Joint	4.74	5.06	5.48	5.98	6.54	7.18
Memory Health	6.71	6.93	7.26	7.66	8.37	9.14
Other Dietary Supplement Positioning	16.61	17.20	17.87	18.81	19.40	19.59
Total	113.71	119.49	127.28	136.81	146.84	157.67



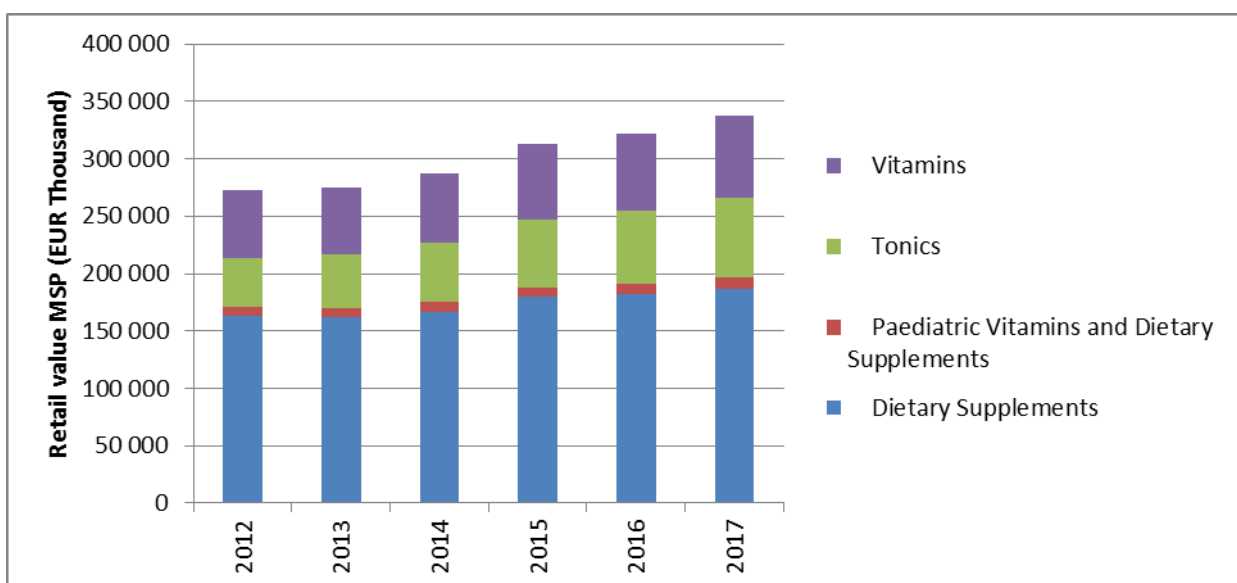
**Figure 1 Dietary Supplements by Positioning, Retail Value MSP (EUR million)**



**Figure 2 Dietary Supplements by Positioning (%) in 2017**

**Table 11 Retail value MSP (EUR Thousand) for dietary supplements and vitamins, historic values**

Subcategory	2012	2013	2014	2015	2016	2017
Dietary Supplements	162 876.88	162 207.51	167 005.49	179 448.39	181 925.02	187 028.25
Paediatric Vitamins and Dietary Supplements	7 723.88	7 686.32	7 912.16	8 542.31	8 754.52	9 136.38
Tonics	43 258.21	46 737.65	51 724.87	58 946.87	63 751.97	70 073.02
Vitamins	58 958.26	58 835.49	60 459.33	65 802.36	67 873.28	71 206.12
Vitamins and Dietary Supplements	272 817.23	275 466.97	287 101.84	312 739.95	322 304.80	337 443.77



**Figure 3 Retail value MSP for dietary supplements and vitamins**

**Table 12 Retail value MSP (EUR Thousand) for dietary supplements and vitamins, prognoses**

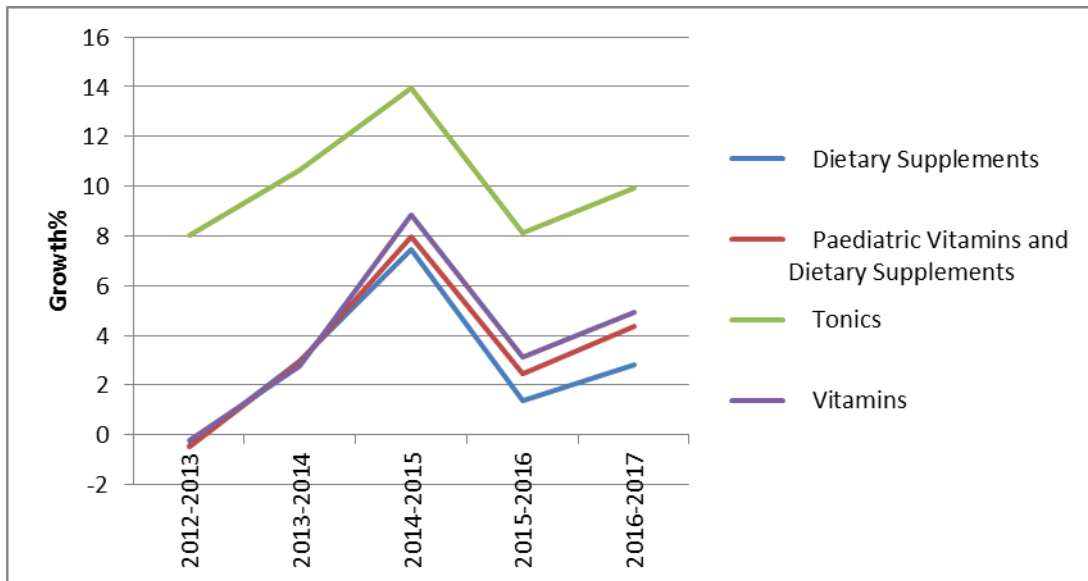
<b>Subcategory</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>
Dietary Supplements	187 167.06	192 474.05	199 758.05	208 665.65	217 706.55
Paediatric Vitamins and Dietary Supplements	8 946.27	9 182.99	9 507.99	9 905.50	10 302.66
Tonics	70 895.00	75 036.15	79 586.67	84 374.37	88 617.70
Vitamins	71 877.73	74 782.66	78 421.91	82 698.62	87 093.83
Vitamins and Dietary Supplements	338 886.05	351 475.85	367 274.62	385 644.14	403 720.73

**Table 13 Growth% for dietary supplements and vitamins, historic values**

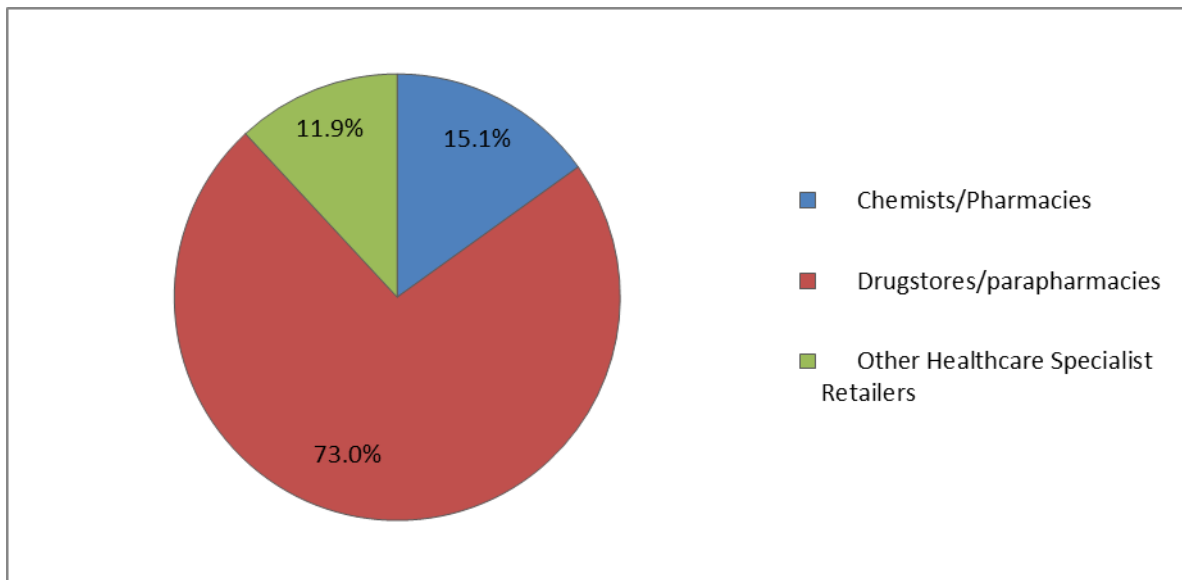
<b>Subcategory</b>	<b>2012-2013</b>	<b>2013-2014</b>	<b>2014-2015</b>	<b>2015-2016</b>	<b>2016-2017</b>
Dietary Supplements	-0.4	3.0	7.5	1.4	2.8
Paediatric Vitamins and Dietary Supplements	-0.5	2.9	8.0	2.5	4.4
Tonics	8.0	10.7	14.0	8.2	9.9
Vitamins	-0.2	2.8	8.8	3.1	4.9
Vitamins and Dietary Supplements	1.0	4.2	8.9	3.1	4.7

**Table 14 Growth% for dietary supplements and vitamins, prognoses**

<b>Subcategory</b>	<b>2017-2018</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>
Dietary Supplements	0.07	2.84	3.78	4.46	4.33
Paediatric Vitamins and Dietary Supplements	-2.08	2.65	3.54	4.18	4.01
Tonics	1.17	5.84	6.06	6.02	5.03
Vitamins	0.94	4.04	4.87	5.45	5.31
Vitamins and Dietary Supplements	0.43	3.72	4.49	5.00	4.69



**Figure 4 Growth% for dietary supplements and vitamins**



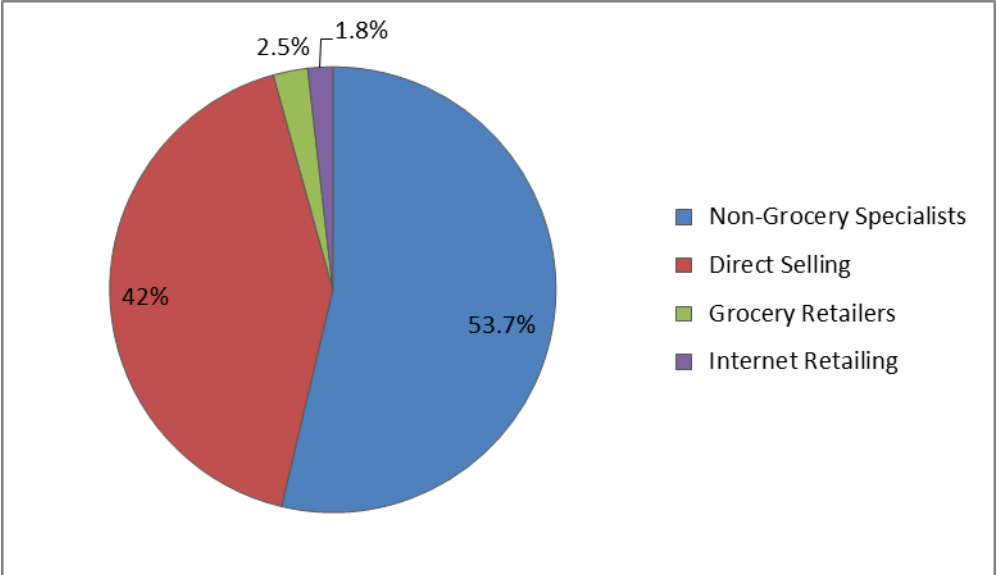
**Figure 5 Outlet through non-grocery specialists in 2017**

**Table 15 Distribution of food supplements, retail value MSP in EUR million (Historic Current Prices, Year-on-Year Exchange Rates) and percentage**

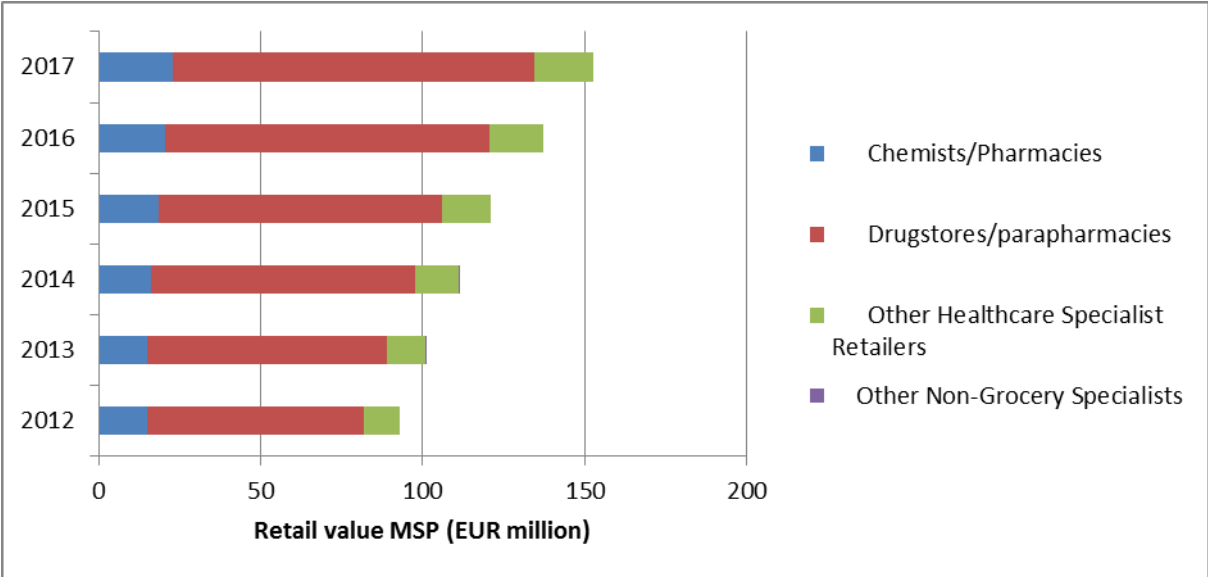
Outlet		2012		2013		2014		2015		2016		2017	
		Unit	%	Unit	%	Unit	%	Unit	%	Unit	%	Unit	%
<b>Store-Based Retailing</b>		<b>98.5</b>	<b>51.7</b>	<b>106.7</b>	<b>52.6</b>	<b>117.1</b>	<b>53.5</b>	<b>127.3</b>	<b>53.4</b>	<b>143.9</b>	<b>55.3</b>	<b>159.9</b>	<b>56.2</b>
Modern Grocery Retailers	Hypermarkets	4.5	2.4	4.7	2.3	5.0	2.3	5.3	2.2	5.7	2.2	6.0	2.1
	Supermarkets	1.2	0.6	1.3	0.6	1.2	0.5	1.1	0.4	1.0	0.4	1.1	0.4
Non-Grocery Specialists	Chemists/Pharmacies	15.2	8.0	15.1	7.4	16.3	7.4	18.4	7.7	20.6	7.9	23.0	8.1
	Drugstores/parapharmacies	66.7	35.0	73.9	36.4	81.4	37.2	87.5	36.7	100.2	38.5	111.6	39.2
	Other Healthcare Specialist Retailers	10.9	5.7	11.7	5.8	13.2	6.0	15.0	6.3	16.4	6.3	18.2	6.4
	Other Non-Grocery Specialists			0.009	0.005	0.001	0.001						
<b>Non-Store Retailing</b>		<b>92.0</b>	<b>48.3</b>	<b>96.2</b>	<b>47.4</b>	<b>101.7</b>	<b>46.5</b>	<b>111.1</b>	<b>46.6</b>	<b>116.3</b>	<b>44.7</b>	<b>124.6</b>	<b>43.8</b>
Internet Retailing		2.5	1.3	2.8	1.4	3.3	1.5	3.8	1.6	4.4	1.7	5.1	1.8
Direct Selling		89.5	47.0	93.3	46.0	98.5	45.0	107.3	45.0	111.9	43.0	119.5	42.0
<b>Total</b>		<b>190.5</b>	<b>100.0</b>	<b>202.9</b>	<b>100.0</b>	<b>218.8</b>	<b>100.0</b>	<b>238.4</b>	<b>100.0</b>	<b>260.1</b>	<b>100.0</b>	<b>284.5</b>	<b>100.0</b>

**Table 16 Distribution of food supplements by main outlet types, percentage**

Outlet	2012	2013	2014	2015	2016	2017
Grocery Retailers	3.0	3.0	2.8	2.7	2.6	2.5
Non-Grocery Specialists	48.7	49.6	50.7	50.7	52.7	53.7
Internet Retailing	1.3	1.4	1.5	1.6	1.7	1.8
Direct Selling	47.0	46.0	45.0	45.0	43.0	42.0



**Figure 6 Distribution by outlet 2017**



**Figure 7 Outlet through non-grocery specialists, Retail Value MSP in EUR million (Historic Current Prices, Year-on-Year Exchange Rates)**



# Digestive Remedies in Malaysia

## Headlines

- Digestive remedies registers 6% current value growth, reaching sales of MYR86 million in 2017
- Highly stressed lifestyle boosts demand for digestive remedies
- Antacids sees the highest growth in 2017 with an 8% increase in current value sales
- GlaxoSmithKline Consumer Healthcare Sdn Bhd retains the leading position in 2017 with an 18% value share
- Digestive remedies to record a CAGR of 2% at constant 2017 prices to reach sales of MYR96 million in 2022

## Prospects

### Highly stressed lifestyles lead to strong demand for antacids

Antacids demonstrated stronger value growth in 2017 compared to 2016, while its volume growth remained steady. The highly stressed lifestyle embraced by Malaysians has caused a rise in demand for antacids for immediate relief of the symptoms associated with stress, for example heartburn and acid reflux. Consumer demand for antacids to ease stomach discomfort has led to notable growth in the range of antacids available in Malaysia. Antacids generated stronger value sales growth in 2017. Consumers also perceive antacids to be common self-medication for stomach discomfort.

Antacids is expected to see an increase in value sales over the forecast period with more Malaysians turning to the use of antacids for relief of stomach issues. Fast-action antacids such as Gaviscon Double Action are expected to continue driving the unit price of antacids during the forecast period. The rising cost of living and busy lifestyle are predicted to cause high stress levels among consumers in Malaysia, which will subsequently lead to rising demand for antacids with fast-acting benefits.

### Rise in on-the-go format packaging within digestive remedies

On-the-go format packaging became highly popular in Malaysia during the review period. Single-portion stick, tablet and sachet formats are getting stronger among consumers with busy lifestyles. As consumers in Malaysia are faced with higher time constraints, on-the-go format digestive remedies are becoming highly demanded. This is mainly due to convenient consumption methods provided by on-the-go formats. Besides single-portion stick packaging formats offered by brands like Gaviscon, tablet formats from brands like Gaviscon and Maalox Plus and sachet formats from brands like Eno have become highly popular among consumers since they can be easily carried during travel.

Stick, sachet and tablet format digestive remedies are expected to remain the development focus for most digestive remedies manufacturers. The rising number of highly time-stressed consumers with busy lifestyles will, in turn, boost demand for digestive remedies in smaller packaging sizes or individual servings.

## Competitive landscape

### **Branded digestive remedies remain strong**

Consumers continue to look for digestive remedies that provide fast relief from various indigestion issues. Branded digestive remedies like Gaviscon, Eno and Actal retain stronger sales performances than generic brands due to stronger confidence among consumers. Eno from GlaxoSmithKline Consumer Healthcare maintained the top sales performance in digestive remedies in 2017. Sales of Gaviscon from Reckitt Benckiser helped the company achieve significant share growth in 2017.

Branded digestive remedies like Gaviscon and Eno remain highly popular options for consumers in Malaysia due to strong marketing strategies. Apart from TV commercials, branded digestive remedies manufacturers pursue active promotional and marketing strategies to boost brand awareness.

### **Generic brands gain share during the review period**

Generic brand digestive remedies competed well against branded ranges in Malaysia during 2017. With spiking costs of living in Malaysia, many consumers with budget constraints have turned to generic digestive remedy brands like Axcel and Alucid. The prices of generic digestive remedies are cheaper than brands like Gaviscon. However, consumers with budget constraints are also attracted to generic brands like Alucid and Axcel because they are manufactured by reputable consumer health players within Malaysia.

Increasing numbers of general practitioners prescribing generic brands of digestive remedies to consumers have also helped to boost demand for generic brands. For instance, the larger number of general practitioners prescribing Axcel Eviline Forte to patients as antacids has helped to boost OTC sales of Axcel Eviline Forte in Malaysia since consumers are likely to purchase the product again once they encounter similar issues.

## Category data

**Table 1 Sales of Digestive Remedies by Category: Value 2012-2017**

MYR million	2012	2013	2014	2015	2016	2017
Paediatric Digestive Remedies	2.8	2.9	3.0	3.2	3.3	3.5
Diarrhoeal Remedies	12.2	12.3	12.6	12.9	13.2	13.4
IBS Treatments	-	-	-	-	-	-
Indigestion and Heartburn Remedies	46.4	48.5	51.5	55.0	58.9	63.2
Laxatives	4.5	4.5	4.5	4.6	4.7	4.7
Motion Sickness Remedies	0.8	0.8	0.8	0.8	0.8	0.8
Digestive Remedies	66.7	69.0	72.5	76.5	80.9	85.6

**Table 2 Sales of Digestive Remedies by Category: % Value Growth 2012-2017**

% current value growth	2016/17	2012-17 CAGR	2012/17 Total
Paediatric Digestive Remedies	4.2	4.1	22.2
Diarrhoeal Remedies	1.4	1.8	9.3
IBS Treatments	-	-	-
Indigestion and Heartburn Remedies	7.4	6.4	36.2
Laxatives	1.0	1.2	5.9
Motion Sickness Remedies	1.0	1.4	7.2
Digestive Remedies	5.9	5.1	28.3

**Table 3 NBO Company Shares of Digestive Remedies: % Value 2013-2017**

% retail value rsp	2013	2014	2015	2016	2017
GlaxoSmithKline Consumer Healthcare Sdn Bhd	17.8	17.5	17.6	17.7	17.8
Reckitt Benckiser (M) Sdn Bhd	14.0	14.6	14.9	15.2	15.4
Valeant Pharmaceuticals International Inc	12.1	12.4	12.6	12.9	13.3
Li Chung Shing Tong (Holdings) Ltd	8.9	8.6	8.4	8.2	7.9
Kotra Industries Bhd	5.4	5.8	6.1	6.5	6.9
Sanofi-Aventis (M) Sdn Bhd	5.3	5.3	5.2	5.1	5.0
GlaxoSmithKline Pharmaceutical Sdn Bhd	4.3	4.2	4.2	4.1	3.9
SSL International Plc	3.4	3.4	3.4	3.3	3.3
Merck (M) Sdn Bhd	3.2	3.2	3.1	3.0	2.9
CCM Pharmaceuticals Sdn Bhd	2.3	2.4	2.6	2.7	2.8
Ipsen SA	2.8	2.7	2.7	2.7	2.6
Bayer (M) Sdn Bhd	1.0	1.1	1.2	1.4	1.6
Sun Pharmaceutical Industries Ltd	-	0.9	0.9	0.8	0.8
Xepa-Soul Pattinson (M) Sdn Bhd	0.7	0.7	0.7	0.7	0.7
Roha Arzneimittel GmbH	0.7	0.7	0.7	0.7	0.7
Boehringer Ingelheim (M) Sdn Bhd	0.6	0.6	0.6	0.6	0.6
DDD Group, The	0.4	0.4	0.4	0.4	0.4
Johnson & Johnson (M) Sdn Bhd	0.3	0.3	0.3	0.3	0.3
Solvay Pharma (M) Sdn Bhd	0.3	0.3	0.3	0.3	0.3
CCM Duopharma Biotech Bhd	0.1	0.1	0.1	0.1	0.1
Ranbaxy (M) Sdn Bhd	0.9	-	-	-	-
Merck Sharp & Dohme (IA) Corp	-	-	-	-	-
Others	15.4	14.8	14.1	13.4	12.8
Total	100.0	100.0	100.0	100.0	100.0

**Table 4 LBN Brand Shares of Digestive Remedies: % Value 2014-2017**

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Eno (GlaxoSmithKline Plc)	GlaxoSmithKline Consumer Healthcare Sdn Bhd	17.5	17.6	17.7	17.8
Actal	Valeant Pharmaceuticals International Inc	12.4	12.6	12.9	13.3
Gaviscon (Reckitt Benckiser Group Plc (RB))	Reckitt Benckiser (M) Sdn Bhd	10.9	11.4	11.8	12.2
Po Chai	Li Chung Shing Tong (Holdings) Ltd	8.6	8.4	8.2	7.9
Axcel	Kotra Industries Bhd	5.8	6.1	6.5	6.9
Maalox (Sanofi)	Sanofi-Aventis (M) Sdn Bhd	5.3	5.2	5.1	5.0
Woodward's Gripe Water (Reckitt Benckiser Group Plc (RB))	SSL International Plc	3.4	3.4	3.3	3.3
Ultracarbon (Merck KGaA)	Merck (M) Sdn Bhd	3.2	3.1	3.0	2.9
Smecta	Ipsen SA	2.7	2.7	2.7	2.6
Zantac (Aspen Pharmacare Holdings Ltd)	GlaxoSmithKline Pharmaceutical Sdn Bhd	2.6	2.6	2.6	2.5
Alucid (CCM Berhad)	CCM Pharmaceuticals Sdn Bhd	2.1	2.3	2.4	2.5
Senokot (Reckitt Benckiser Group Plc (RB))	Reckitt Benckiser (M) Sdn Bhd	2.2	2.2	2.1	2.0
Alka-Seltzer (Bayer AG)	Bayer (M) Sdn Bhd	1.1	1.2	1.4	1.6
Tagamet (GlaxoSmithKline Plc)	GlaxoSmithKline Pharmaceutical Sdn Bhd	1.6	1.6	1.5	1.5
Fybogel (Reckitt Benckiser Group Plc (RB))	Reckitt Benckiser (M) Sdn Bhd	1.4	1.3	1.3	1.2
Histac	Sun Pharmaceutical Industries Ltd	-	0.9	0.8	0.8
Bekunis	Roha Arzneimittel GmbH	0.7	0.7	0.7	0.7
Dulcolax (Sanofi)	Boehringer Ingelheim (M) Sdn Bhd	-	-	-	0.6

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Novomin	Xepa-Soul Pattinson (M) Sdn Bhd	0.5	0.5	0.5	0.5
Dentinox	DDD Group, The	0.4	0.4	0.4	0.4
Beacolux (CCM Berhad)	CCM Pharmaceuticals Sdn Bhd	0.3	0.3	0.3	0.3
Stugeron (Johnson & Johnson Inc)	Johnson & Johnson (M) Sdn Bhd	0.3	0.3	0.3	0.3
Duphalac (Abbott Laboratories Inc)	Solvay Pharma (M) Sdn Bhd	0.3	0.3	0.3	0.3
Colimix	Xepa-Soul Pattinson (M) Sdn Bhd	0.2	0.2	0.2	0.2
Famodine (CCM Berhad)	CCM Duopharma Biotech Bhd	0.1	0.1	0.1	0.1
Dulcolax (Boehringer Ingelheim GmbH)	Boehringer Ingelheim (M) Sdn Bhd	0.6	0.6	0.6	-
Histac (Daiichi Sankyo Co Ltd)	Sun Pharmaceutical Industries Ltd	0.9	-	-	-
Pepcidine (Johnson & Johnson Inc)	Merck Sharp & Dohme (IA) Corp	-	-	-	-
Histac (Daiichi Sankyo Co Ltd)	Ranbaxy (M) Sdn Bhd	-	-	-	-
Duphalac (Solvay SA)	Solvay Pharma (M) Sdn Bhd	-	-	-	-
Others	Others	14.8	14.1	13.4	12.8
Total	Total	100.0	100.0	100.0	100.0

**Table 5 Forecast Sales of Digestive Remedies by Category: Value 2017-2022**

MYR million	2017	2018	2019	2020	2021	2022
Paediatric Digestive Remedies	3.5	3.5	3.5	3.5	3.6	3.6
Diarrhoeal Remedies	13.4	13.0	12.8	12.5	12.2	11.8
IBS Treatments	-	-	-	-	-	-
Indigestion and Heartburn Remedies	63.2	64.6	67.2	69.9	72.8	76.1
Laxatives	4.7	4.5	4.4	4.3	4.1	4.0
Motion Sickness Remedies	0.8	0.8	0.8	0.8	0.8	0.7
Digestive Remedies	85.6	86.5	88.6	90.9	93.4	96.2

**Table 6 Forecast Sales of Digestive Remedies by Category: % Value Growth 2017-2022**

% constant value growth	2017/2018	2017-22 CAGR	2017/22 Total
Paediatric Digestive Remedies	0.7	0.7	3.3
Diarrhoeal Remedies	-2.5	-2.4	-11.4
IBS Treatments	-	-	-
Indigestion and Heartburn Remedies	2.2	3.8	20.3
Laxatives	-4.1	-3.3	-15.5
Motion Sickness Remedies	-2.9	-2.9	-13.6
Digestive Remedies	1.0	2.4	12.4

# Herbal/Traditional Products in Malaysia

## Headlines

- In 2017, herbal/traditional products in Malaysia shows an 8% hike in current value sales to reach MYR1.3 billion
- Family tradition influences the selection of herbal/traditional products in Malaysia
- Herbal/traditional tonics sees the highest current value growth with 12% in 2017
- Cerebos dominates sales of herbal/traditional products with a 19% value share in 2017
- Herbal/traditional products to record a 3% CAGR at constant 2017 prices to reach sales of MYR1.5 billion in 2022

## Prospects

### **Family values instil the use of herbal/traditional products**

Family culture is the most important factor promoting the use of herbal/traditional products. Malaysia is made up of three main races: Malay, Chinese and Indian. However, the use of herbal/traditional consumer health products is not subject to the races the consumers are in. For instance, Chinese brand Nin Jiom Pei Pa Koa (in cough remedies) is highly popular among different races in Malaysia, and not limited only to Chinese consumers.

The use of herbal/traditional products is influenced greatly by family background. Family tradition serves as an important factor in the use of herbal/traditional products like Po Chai to ease stomach discomfort, Tiger Balm as a topical analgesic product and Nin Jiom Pei Pa Koa as a cough remedy.

### **Distribution of herbal/traditional products is not limited only to traditional medicine halls**

Retail distribution channels for herbal/traditional products in Malaysia are not limited only to traditional medicine halls. Distribution share is contributed by parapharmacies, and health and beauty specialist retailers continues to rise in conjunction with the extension to herbal/traditional products by international consumer health players. Sales of herbal/traditional products like Brand's, Tiger Balm, African Sea Coconut and herbal/traditional dietary supplements like Bio-Life and VitaHealth are not limited only to traditional medicine halls but are also in outlets like Watsons and Caring Pharmacy. Many herbal/traditional products are marketed side by side with non-herbal/traditional products in Malaysia.

### **The number of herbal/traditional products in vitamins and dietary supplements surges**

Research on the use of herbal/traditional ingredients in vitamins and dietary supplements continues to be more significant among leading players like Blackmores, Kordel's and Bio-Life. In addition to existing herbal/traditional dietary supplements like echinacea, evening primrose oil, garlic, ginseng and ginkgo biloba, new herbal/traditional ingredients like coriander, fennel seed extract, red raspberry leaf extract and fenugreek have been incorporated into dietary supplements by these manufacturers. These herbal/traditional ingredients are claimed to promote general health and to lower cholesterol, as well as assist in blood sugar management. An increasing number of herbal/traditional products introduced by vitamins and dietary supplements players continued to boost the value shares of Bio-Life, Kordel's and VitaHealth during 2017 in herbal/traditional products.



## Competitive landscape

### **Cerebos outshines competitors through continuous innovation**

Cerebos Sdn Bhd continues to lead herbal/traditional products, having achieved a significant sales standing with established household brand, Brand's. Not only does Brand's show constant improvement by adding new product ranges, such as Brand's Ca'ya, but the company also focuses on retaining consumers' interest, for example by renewing the packaging image of its Brand's Essence of Chicken. Brand's shows significant efforts in tailoring its products to different consumer groups, comprised of active people, beauty seekers, busy adults, children, seniors and students.

Brand's Ca'ya is one of the latest new additions to the Brand's range in Malaysia. The product specifically targets men, which marks the first men's positioning in tonics. Brand's Ca'ya combines two powerful natural ingredients, Habbatus Sauda and ginseng, to provide sustainable energy to help users lead an energised lifestyle.

### **International brands expand presence in herbal/traditional products**

International consumer health brands show strong interest in expanding their product ranges into herbal/traditional products. International brands such as Bio-Life, VitaHealth, Woods' and Blackmores increasingly introduce herbal/traditional products across categories like vitamins, dietary supplements and cough remedies. The use of herbal ingredients in dietary supplements is becoming more popular as consumers are aware of the benefits provided by various natural ingredients. For example, VitaHealth Vita Cherry Complex is a natural joint-relief formula with the main ingredients being tart cherry, black pepper fruit and Boswellia serrata resin, all being natural herbal ingredients claimed to deliver strong anti-inflammatory and antioxidant activities that are beneficial in easing joint discomfort.

Growing consumer interest in herbal/traditional products will prompt more international manufacturers to penetrate herbal/traditional products. Herbal/traditional products with vitamins and dietary supplements, in particular, are projected to encounter stronger demand from consumers due to the increasingly known benefits of natural ingredients being researched.

## Category data

**Table 1 Sales of Herbal/Traditional Products by Category: Value 2012-2017**

MYR million	2012	2013	2014	2015	2016	2017
Herbal/Traditional Topical Analgesics	68.5	72.7	77.4	82.6	88.2	94.4
Herbal/Traditional Sleep Aids	-	-	-	-	-	-
Herbal/Traditional Cough, Cold and Allergy (Hay Fever) Remedies	217.8	228.1	241.8	257.5	275.5	295.9
Herbal/Traditional Digestive Remedies	11.4	11.6	11.9	12.2	12.7	13.1
Herbal/Traditional Dermatologicals	-	-	-	-	-	-
Herbal/Traditional Paediatric Dietary Supplements	-	-	-	-	-	-
Herbal/Traditional Dietary Supplements	456.0	473.7	499.1	533.3	567.3	602.8
Herbal/Traditional Tonics	189.0	213.6	243.5	267.8	292.7	327.6
Herbal/Traditional Products	942.7	999.5	1,073.6	1,153.4	1,236.4	1,333.7

**Table 2 Sales of Herbal/Traditional Products by Category: % Value Growth 2012-2017**

% current value growth	2012-17 2016/17	2012-17 CAGR	2012/17 Total
Herbal/Traditional Topical Analgesics	7.0	6.6	37.6
Herbal/Traditional Sleep Aids	-	-	-
Herbal/Traditional Cough, Cold and Allergy (Hay Fever) Remedies	7.4	6.3	35.8
Herbal/Traditional Digestive Remedies	3.7	2.9	15.1
Herbal/Traditional Dermatologicals	-	-	-
Herbal/Traditional Paediatric Dietary Supplements	-	-	-
Herbal/Traditional Dietary Supplements	6.2	5.7	32.2
Herbal/Traditional Tonics	11.9	11.6	73.3
Herbal/Traditional Products	7.9	7.2	41.5

**Table 3 NBO Company Shares of Herbal/Traditional Products: % Value 2013-2017**

% retail value rsp	2013	2014	2015	2016	2017
Cerebos Sdn Bhd	14.7	15.8	16.8	18.1	19.4
Elken Sdn Bhd	7.8	7.6	7.5	7.4	7.2
Lofthouse of Fleetwood Ltd	4.1	4.0	3.8	3.7	3.6
Ricola Asia Pacific Pte Ltd	3.7	3.5	3.4	3.2	3.0
Haw Par Healthcare Ltd	2.9	2.9	2.9	2.9	2.9
Amway (M) Sdn Bhd	2.9	2.9	2.9	2.9	2.8
Nu Skin (M) Sdn Bhd	3.5	3.4	3.2	3.0	2.8
Cosway (M) Sdn Bhd	3.3	3.1	3.0	2.8	2.6
Bio-Life Marketing (M) Sdn Bhd	2.5	2.5	2.4	2.4	2.3
Yomeishu Seizo Co Ltd	2.3	2.3	2.4	2.4	2.3
VitaHealth Asia Pacific (S) Pte Ltd	2.3	2.3	2.3	2.2	2.1
Nin Jiom Medicine Mfy (Hong Kong) Ltd	1.7	1.7	1.7	1.6	1.6
Eu Yan Sang (1959) Sdn Bhd	1.3	1.2	1.3	1.5	1.6
Kordel's Ltd	1.7	1.6	1.6	1.6	1.5
Blackmores (M) Sdn Bhd	1.2	1.2	1.2	1.2	1.2
Mondelez (M) Sales Sdn Bhd	1.5	1.4	1.4	1.3	1.2
Hacks (M) Sdn Bhd	1.4	1.4	1.3	1.3	1.2
CNI Enterprise (M) Sdn Bhd	1.5	1.4	1.3	1.2	1.1
Leung Kai Fook Co Ltd	0.9	0.9	0.9	0.9	0.9
21st Century Products Sdn Bhd	0.8	0.8	0.8	0.7	0.7
Enseval Megatrading (M) Sdn Bhd	0.8	0.8	0.7	0.7	0.7
PGT Healthcare	0.7	0.7	0.6	0.6	0.6
Merck (M) Sdn Bhd	0.6	0.6	0.6	0.6	0.6
Li Chung Shing Tong (Holdings) Ltd	0.6	0.6	0.6	0.5	0.5

% retail value rsp	2013	2014	2015	2016	2017
Huamao Agencies Sdn Bhd	0.6	0.5	0.5	0.5	0.4
Ipsen SA	0.5	0.5	0.5	0.5	0.4
Poon Goor Soe Ltd	0.5	0.5	0.5	0.4	0.4
Luen Fook Medicine Sdn Bhd	0.3	0.3	0.3	0.3	0.3
Herbal Revival Sdn Bhd	0.3	0.3	0.3	0.3	0.3
Jin Bin Corp Sdn Bhd	0.2	0.2	0.2	0.2	0.2
Others	33.1	33.3	33.2	33.2	33.6
Total	100.0	100.0	100.0	100.0	100.0

**Table 4 LBN Brand Shares of Herbal/Traditional Products: % Value 2014-2017**

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Brand's (Suntory Holdings Ltd)	Cerebos Sdn Bhd	15.8	16.8	18.1	19.4
Elken	Elken Sdn Bhd	7.1	7.0	6.9	6.7
Fisherman's Friend	Lofthouse of Fleetwood Ltd	4.0	3.8	3.7	3.6
Ricola (Ricola AG)	Ricola Asia Pacific Pte Ltd	3.5	3.4	3.2	3.0
Nutrilite (Amway Corp)	Amway (M) Sdn Bhd	2.9	2.9	2.9	2.8
Pharmanex (Nu Skin Enterprises Inc)	Nu Skin (M) Sdn Bhd	3.4	3.2	3.0	2.8
Cosway (Berjaya Corp Bhd)	Cosway (M) Sdn Bhd	3.1	3.0	2.8	2.6
Bio-Life (Bio-Life (S) Pte Ltd)	Bio-Life Marketing (M) Sdn Bhd	2.5	2.4	2.4	2.3
Yomeishu	Yomeishu Seizo Co Ltd	2.3	2.4	2.4	2.3
Tiger Balm (Haw Par Corp Ltd)	Haw Par Healthcare Ltd	2.3	2.3	2.3	2.3
VitaHealth (Vita Life Sciences Ltd)	VitaHealth Asia Pacific (S) Pte Ltd	2.3	2.3	2.2	2.1
Eu Yan Sang (Eu Yan Sang International Ltd)	Eu Yan Sang (1959) Sdn Bhd	1.2	1.3	1.5	1.6

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Kordel's (Bionor Pharma ASA)	Kordel's Ltd	1.6	1.6	1.6	1.5
Blackmores (Blackmores Ltd)	Blackmores (M) Sdn Bhd	1.2	1.2	1.2	1.2
Halls (Mondelez International Inc)	Mondelez (M) Sales Sdn Bhd	1.4	1.4	1.3	1.2
Hacks (Mondelez International Inc)	Hacks (M) Sdn Bhd	1.4	1.3	1.3	1.2
Nin Jiom Pei Pa Koa	Nin Jiom Medicine Mfy (Hong Kong) Ltd	1.0	1.0	1.1	1.1
CNI (Citra Nusa Insan Cemerlang PT)	CNI Enterprise (M) Sdn Bhd	1.2	1.1	1.0	0.9
Axe Brand	Leung Kai Fook Co Ltd	0.9	0.9	0.9	0.9
21st Century (21st Century Laboratories Inc)	21st Century Products Sdn Bhd	0.8	0.8	0.7	0.7
Woods' (Kalbe Farma Tbk PT)	Enseval Megatrading (M) Sdn Bhd	0.8	0.7	0.7	0.7
Kwan Loong Medicated Oil (Haw Par Corp Ltd)	Haw Par Healthcare Ltd	0.6	0.6	0.6	0.6
Vicks (Procter & Gamble Co, The)	PGT Healthcare	0.7	0.6	0.6	0.6
Nin Jiom	Nin Jiom Medicine Mfy (Hong Kong) Ltd	0.6	0.6	0.6	0.6
Seven Seas (Merck KGaA)	Merck (M) Sdn Bhd	0.6	0.6	0.6	0.6
Po Chai	Li Chung Shing Tong (Holdings) Ltd	0.6	0.6	0.5	0.5
Win	Elken Sdn Bhd	0.5	0.5	0.5	0.5
Polleney (Huamao Pte Ltd)	Huamao Agencies Sdn Bhd	0.5	0.5	0.5	0.4
Tanakan	Ipsen SA	0.5	0.5	0.5	0.4
Poon Goor Soe	Poon Goor Soe Ltd	0.5	0.5	0.4	0.4
Others	Others	34.3	34.2	34.2	34.6
Total	Total	100.0	100.0	100.0	100.0

**Table 5 Forecast Sales of Herbal/Traditional Products by Category: Value 2017-2022**

MYR million	2017	2018	2019	2020	2021	2022
Herbal/Traditional Topical Analgesics	94.4	95.8	98.7	101.5	104.1	106.5
Herbal/Traditional Sleep Aids	-	-	-	-	-	-
Herbal/Traditional Cough, Cold and Allergy (Hay Fever) Remedies	295.9	305.8	317.7	328.8	338.7	345.4
Herbal/Traditional Digestive Remedies	13.1	13.6	13.9	14.2	14.4	14.5
Herbal/Traditional Dermatologicals	-	-	-	-	-	-
Herbal/Traditional Paediatric Dietary Supplements	-	-	-	-	-	-
Herbal/Traditional Dietary Supplements	602.8	609.2	622.5	635.1	646.6	657.2
Herbal/Traditional Tonics	327.6	337.0	350.8	363.8	376.2	388.2
Herbal/Traditional Products	1,333.7	1,361.4	1,403.6	1,443.3	1,479.9	1,511.8

**Table 6 Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2017-2022**

% constant value growth	2017/2018	2017-22 CAGR	2017/22 Total
Herbal/Traditional Topical Analgesics	1.6	2.5	12.9
Herbal/Traditional Sleep Aids	-	-	-
Herbal/Traditional Cough, Cold and Allergy (Hay Fever) Remedies	3.3	3.1	16.7
Herbal/Traditional Digestive Remedies	3.9	2.1	10.8
Herbal/Traditional Dermatologicals	-	-	-
Herbal/Traditional Paediatric Dietary Supplements	-	-	-
Herbal/Traditional Dietary Supplements	1.1	1.7	9.0
Herbal/Traditional Tonics	2.9	3.5	18.5
Herbal/Traditional Products	2.1	2.5	13.4

# Vitamins in Malaysia

## Headlines

- Vitamins enjoys 10% current value growth in 2017 elevating sales to MYR507 million
- Multivitamins presents a highly convenient vitamin type for Malaysians
- Vitamin C remains the most popular with a 13% hike in current value sales in 2017
- Amway (M) Sdn Bhd outperforms other companies in 2017 with a 27% value share
- Vitamins to record a 4% CAGR at constant 2017 prices over the forecast period to reach sales of MYR601 million in 2022

## Prospects

### Government regulations on vitamins in Malaysia

The Malaysian government does not subsidise consumer purchases of vitamins; however, more Malaysians are purchasing vitamins to maintain a healthier lifestyle by strengthening their immune system. Consumers with greater health awareness generally undertake preventive measures through consumption of vitamins to maintain and increase overall wellbeing.

Since 2015, 6% Goods and Services Tax (GST) has been imposed by the Malaysian government on all vitamins, including multivitamins and single vitamins. Consumers with lower budgets for vitamins have been adversely affected by the GST because the price increase has trimmed their spending. Over the forecast period, price-sensitive consumers will tend to buy vitamins during promotions to save money. Vitamin brands such as Kordel's, Nature's Way, Blackmores and Bio-Life may offer more bundle value packs at promotional prices to attract more customers.

### Vitamin C and multivitamins are most popular

Vitamin C remained a leading type in Malaysia in 2017 and posted the strongest value growth because of consumers' familiarity with its benefits. Leading players' launches of new products, such as Bio-Life Non-Acidic Vitamin C & Bioflavonoids, Blackmores Bio C, and Nature's Way, continued to boost value sales growth of vitamin C during 2017.

Multivitamins recorded the second fastest value growth in 2017. Bio-Life's TiniTabs range, with FemVites and EnerVites variants, targets different customer segments. Multivitamins are highly demanded as the format is very convenient as consumers do not need to consume multiple single vitamins. Multivitamins are also more cost-saving as consumers do not need to purchase various single vitamins. As consumers' knowledge of vitamin C and multivitamins continues to grow, these types will enjoy relatively strong growth. Consumer health manufacturers are expected to continue introducing new ranges due to strong demand from consumers.

### Parapharmacies and health and beauty specialist retailers form the main distribution channel

Parapharmacies like Guardian and Caring Pharmacy and health and beauty specialist retailers like Watsons and AEON Wellness have emerged as the major distribution channel for vitamins in Malaysia. Shelf space occupied by vitamins in these outlets has continued to grow; thus, more consumers look for vitamins in these outlets. Sales assistants and promoters stationed in these outlets by vitamins manufacturers also help to boost demand for vitamins since they can provide professional information to assist consumers' buying process.

Promotional tactics by players like AEON Wellness, Guardian, Watsons and Caring Pharmacy to attract more consumers help to boost the distribution share of these channels. Bundle promotion packs and discounts given on vitamin products help to attract more consumers to purchase vitamins. The distribution share of vitamins through parapharmacies and health and beauty specialist retailers will continue to develop in Malaysia as consumers are pampered with large varieties of vitamins on shelves. Promotional campaigns on vitamin products organised by retailers like Guardian, Watsons and Caring Pharmacy are expected to attract more customers during the forecast period.

## Competitive landscape

### **Malaysians split demand between international and domestic brands**

International vitamins brands like Nutrilite, Pharmaton, Blackmores, Redoxon and VitaHealth hold a significant value share in Malaysia. Nonetheless, local brands such as Appeton, Flavettes and Provite compete well with them, continuing to strengthen their presence through expanding outlet networks. While international brands have gained consumers' confidence, local manufacturers like Kotra Industries Bhd undertake aggressive marketing strategies through active promotions. Appeton Essentials Activ-C is a vitamin C promoted aggressively by Kotra in Malaysia.

Both domestic and international manufacturers will invest in launches of vitamins to meet consumer demand. During the forecast period, vitamins A and D will become focus areas for manufacturers to introduce into Malaysia, either in combination form or as single vitamins due to rising consumer interest.

### **Private label slowly taps into vitamins**

Private label manufacturers have emerged as competitors in vitamins in Malaysia. During 2017, several private label vitamin ranges were launched by Watsons and Guardian, including Watsons Vitamin C 1,000mg plus Zinc 10mg, Guardian Vitamin B Complex + Vitamin C + Minerals Effervescent Tablet, and Guardian Vitamin C 1,000mg + Zinc 10mg Effervescent Tablet, available across all Watsons and Guardian outlets.

Private label vitamins mainly target cost-conscious consumers, appearing to be cheaper than branded vitamins. This provides consumers in different segments with a cheaper alternative in maintaining optimum health and nutrition. With Malaysians' changing perception, private label brands like Watsons and Guardian will expand within vitamins by launching more products. Private label manufacturers are projected to tap into more vitamin types instead of focusing just on vitamin C, as consumers become more accepting of private label vitamins. Consumers who have tested private label vitamins B and C are expected to gain stronger confidence in such ranges, and hence be more willing to try new vitamins introduced by private label ranges.



## Category data

### **Summary 1 Multivitamins: Brand Ranking by Positioning 2017**

Positioning	Brand ranking	Brand	GBO
Teenagers	1	Blackmores	Blackmores Ltd
	2	Appeton	Kotra Industries Bhd
Women	1	Nutrilite	Amway Corp
	2	Pharmaton	Sanofi
	3	21st Century	21st Century Laboratories Inc
Men	1	Nutrilite	Amway Corp
	2	Pharmaton	Sanofi
	3	Cosway	Berjaya Corp Bhd
Elderly	1	Nutrilite	Amway Corp
	2	Pharmaton	Sanofi
	3	Cosway	Berjaya Corp Bhd
Pregnancy	1	New Obimin	Westmont
	2	Obimin Pluz	Westmont
	3	Similac Pramilet	Abbott Laboratories Inc
Other Multivitamins Positioning	1	Scott's	GlaxoSmithKline Plc
	2	Champs	CCM Berhad
	3	Appeton	Kotra Industries Bhd

**Table 1 Sales of Vitamins by Category: Value 2012-2017**

MYR million	2012	2013	2014	2015	2016	2017
Multivitamins	218.7	229.6	243.4	264.1	287.3	313.8
Single Vitamins	129.0	136.5	145.8	159.7	175.4	193.3
- Vitamin A	-	-	-	-	-	-
- Vitamin B	27.4	28.7	29.9	32.2	34.6	37.3
- Vitamin C	78.6	84.9	92.8	104.0	116.8	131.4
- Vitamin D	-	-	-	-	-	-
- Vitamin E	23.0	22.9	23.0	23.5	24.0	24.6
- Other Single Vitamins	-	-	-	-	-	-
Vitamins	347.7	366.1	389.2	423.8	462.7	507.0

**Table 2 Sales of Vitamins by Category: % Value Growth 2012-2017**

% current value growth	2016/17	2012-17 CAGR	2012/17 Total
Multivitamins	9.2	7.5	43.5
Single Vitamins	10.2	8.4	49.8
- Vitamin A	-	-	-
- Vitamin B	7.7	6.4	36.3
- Vitamin C	12.5	10.8	67.0
- Vitamin D	-	-	-
- Vitamin E	2.5	1.4	7.1
- Other Single Vitamins	-	-	-
Vitamins	9.6	7.8	45.8

**Table 3 Sales of Multivitamins by Positioning: % Value 2012-2017**

% retail value rsp	2012	2013	2014	2015	2016	2017
Elderly	2.3	2.3	2.4	2.4	2.5	2.6
Men	26.9	26.9	26.7	26.6	26.5	26.4
Pregnancy	6.3	6.4	6.4	6.5	6.6	6.7
Teenagers	2.2	2.2	2.3	2.4	2.5	2.6
Women	27.0	27.0	26.6	26.5	26.4	26.3
Other Multivitamins Positioning	35.2	35.2	35.6	35.6	35.5	35.4
Total	100.0	100.0	100.0	100.0	100.0	100.0

**Table 4 NBO Company Shares of Vitamins: % Value 2013-2017**

% retail value rsp	2013	2014	2015	2016	2017
Amway (M) Sdn Bhd	27.8	27.5	27.0	26.7	26.5
Boehringer Ingelheim (M) Sdn Bhd	11.0	11.1	11.0	10.7	10.2
Blackmores (M) Sdn Bhd	7.4	7.7	7.9	8.3	8.7
Bayer (M) Sdn Bhd	7.7	7.8	7.7	7.6	7.5
USANA Health Sciences Sdn Bhd	6.8	7.0	7.0	7.1	7.1
Cosway (M) Sdn Bhd	7.8	7.7	7.4	7.1	6.8
VitaHealth Asia Pacific (S) Pte Ltd	4.2	4.2	4.3	4.3	4.4
Forever Living Products (M) Sdn Bhd	3.6	3.6	3.4	3.2	3.0
Abbott Laboratories (M) Sdn Bhd	2.9	2.8	2.8	2.8	2.8
Pfizer (M) Sdn Bhd	2.1	2.2	2.3	2.3	2.3
CCM Pharmaceuticals Sdn Bhd	2.9	2.7	2.6	2.4	2.2
Shaklee Products (M) Sdn Bhd	2.9	2.8	2.4	2.2	2.1
Kotra Industries Bhd	1.3	1.4	1.5	1.5	1.5
Merck (M) Sdn Bhd	1.9	1.8	1.7	1.5	1.4
Kordel's Ltd	1.7	1.8	1.6	1.4	1.3
21st Century Products Sdn Bhd	1.2	1.3	1.2	1.2	1.2
CNI Enterprise (M) Sdn Bhd	1.9	1.7	1.5	1.3	1.1
Bio-Life Marketing (M) Sdn Bhd	0.4	0.5	0.5	0.5	0.6
PharmaCare Laboratories (Asia) Sdn Bhd	0.2	0.2	0.3	0.3	0.3
Medipharm Industries Sdn Bhd	0.1	0.1	0.1	0.1	0.2
Quest Vitamins Ltd	0.1	0.1	0.1	0.0	0.0
Others	4.0	3.9	5.7	7.3	8.7
Total	100.0	100.0	100.0	100.0	100.0

**Table 5 LBN Brand Shares of Vitamins: % Value 2014-2017**

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Nutrilite (Amway Corp)	Amway (M) Sdn Bhd	27.5	27.0	26.7	26.5
Pharmaton (Sanofi)	Boehringer Ingelheim (M) Sdn Bhd	-	-	-	10.2
Blackmores (Blackmores Ltd)	Blackmores (M) Sdn Bhd	7.7	7.9	8.3	8.7
USANA (USANA Health Sciences Inc)	USANA Health Sciences Sdn Bhd	7.0	7.0	7.1	7.1
Cosway (Berjaya Corp Bhd)	Cosway (M) Sdn Bhd	7.7	7.4	7.1	6.8
Redoxon (Bayer AG)	Bayer (M) Sdn Bhd	5.7	5.8	5.9	6.0
VitaHealth (Vita Life Sciences Ltd)	VitaHealth Asia Pacific (S) Pte Ltd	4.2	4.3	4.3	4.4
Forever Living (Forever Living Products International LLC)	Forever Living Products (M) Sdn Bhd	3.6	3.4	3.2	3.0
Centrum (Pfizer Inc)	Pfizer (M) Sdn Bhd	2.2	2.3	2.3	2.3
Shaklee (Shaklee Corp)	Shaklee Products (M) Sdn Bhd	2.8	2.4	2.2	2.1
Surbex (Abbott Laboratories Inc)	Abbott Laboratories (M) Sdn Bhd	1.2	1.3	1.4	1.5
Appeton	Kotra Industries Bhd	1.4	1.5	1.5	1.5
Kordel's (Bionor Pharma ASA)	Kordel's Ltd	1.8	1.6	1.4	1.3
21st Century (21st Century Laboratories Inc)	21st Century Products Sdn Bhd	1.3	1.2	1.2	1.2
CNI (Citra Nusa Insan Cemerlang PT)	CNI Enterprise (M) Sdn Bhd	1.7	1.5	1.3	1.1
Natopherol (Abbott Laboratories Inc)	Abbott Laboratories (M) Sdn Bhd	1.3	1.2	1.2	1.1
Seven Seas (Merck KGaA)	Merck (M) Sdn Bhd	1.5	1.3	1.2	1.0
Bio-Life (Bio-Life (S) Pte Ltd)	Bio-Life Marketing (M) Sdn Bhd	0.5	0.5	0.5	0.6
Berocca (Bayer AG)	Bayer (M) Sdn Bhd	0.6	0.6	0.6	0.6

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Flavettes (CCM Berhad)	CCM Pharmaceuticals Sdn Bhd	0.5	0.5	0.4	0.4
Cebiĉn (Merck KGaA)	Merck (M) Sdn Bhd	0.3	0.4	0.4	0.4
Nature's Way (Dr Willmar Schwabe GmbH & Co KG)	PharmaCare Laboratories (Asia) Sdn Bhd	0.2	0.3	0.3	0.3
Eurobio	Medipharm Industries Sdn Bhd	0.1	0.1	0.1	0.2
Upha (CCM Berhad)	CCM Pharmaceuticals Sdn Bhd	0.6	0.4	0.2	0.1
Quest (Jamieson Laboratories Ltd)	Quest Vitamins Ltd	0.1	0.1	0.0	0.0
Pharmaton (Boehringer Ingelheim GmbH)	Boehringer Ingelheim (M) Sdn Bhd	11.1	11.0	10.7	-
Supradyn (Bayer AG)	Bayer (M) Sdn Bhd	0.1	0.1	-	-
Kordel's (Vitaco Health Ltd)	Kordel's Ltd	-	-	-	-
Centrum (Wyeth)	Pfizer (M) Sdn Bhd	-	-	-	-
Others	Others	7.3	9.0	10.3	11.4
Total	Total	100.0	100.0	100.0	100.0

**Table 6 Forecast Sales of Vitamins by Category: Value 2017-2022**

MYR million	2017	2018	2019	2020	2021	2022
Multivitamins	313.8	322.9	335.8	347.5	357.9	368.0
Single Vitamins	193.3	197.2	206.1	215.0	224.0	233.1
- Vitamin A	-	-	-	-	-	-
- Vitamin B	37.3	38.4	39.7	41.0	42.2	43.4
- Vitamin C	131.4	134.1	141.5	148.8	156.3	163.8
- Vitamin D	-	-	-	-	-	-
- Vitamin E	24.6	24.8	25.0	25.2	25.5	25.9
- Other Single Vitamins	-	-	-	-	-	-
Vitamins	507.0	520.1	541.9	562.6	582.0	601.0

**Table 7 Forecast Sales of Vitamins by Category: % Value Growth 2017-2022**

% constant value growth	2017/2018	2017-22 CAGR	2017/22 Total
Multivitamins	2.9	3.2	17.3
Single Vitamins	2.0	3.8	20.6
- Vitamin A	-	-	-
- Vitamin B	2.8	3.1	16.4
- Vitamin C	2.1	4.5	24.7
- Vitamin D	-	-	-
- Vitamin E	0.6	1.0	5.2
- Other Single Vitamins	-	-	-
Vitamins	2.6	3.5	18.5

# Weight Management and Wellbeing in Malaysia

## Headlines

- Weight management and wellbeing experiences a 1% increase bringing current value sales to MYR788 million in 2017
- Improving literacy leads to rising demand for supplement nutrition drinks
- Slimming teas enjoys the strongest current value growth of 7% in 2017
- Nu Skin (M) Sdn Bhd leads weight management and wellbeing in Malaysia with a 27% value share in 2017
- Weight management and wellbeing to record a 3% CAGR at constant 2017 prices as sales increase to MYR906 million in 2022

## Prospects

### **Improving literacy leads to growing demand for supplement nutrition drinks**

Malaysians are increasingly aware of the importance of complete nutrition but rising numbers are exposed to incomplete nutrition through poor dietary lifestyle. Supplement nutrition drinks in Malaysia boasted value sales growth in 2017. Aside from launches of many supplement nutrition drinks from highly-renowned manufacturers such as Nestlé, Abbott Laboratories and Wyeth Nutrition, other brands like Kinohimitsu, Good Morning and Biogreen have introduced supplement nutrition drinks to meet rising demand from consumers.

Manufacturers of supplement nutrition drinks organise various promotional campaigns and events to attract consumers. Sampling booths, packs and leaflets are distributed to help boost sales of supplement nutrition drinks. Consumers in Malaysia are more educated on the importance of complete nutrition provided by supplement nutrition drinks to ensure a healthy lifestyle. The improved literacy rate with more Malaysians receiving formal education has helped boost health awareness among consumers. Greater acceptance of the importance of complete nutrition on health and wellness is highly associated with consumers' improving literacy rate. Over the forecast period, consumers are likely to show stronger interest in using supplement nutrition drinks daily to help replenish insufficient nutrition needed by the body. With the launch of more supplement nutrition drinks by various manufacturers, consumers are expected to gain stronger awareness of the importance of taking supplement nutrition drinks.

### **Substitution of healthier lifestyle leads to slower growth in weight loss supplements**

While demand for supplement nutrition drinks continues to grow, demand for weight loss supplements has encountered a slowdown in value growth. Malaysians are increasingly adapting to healthier lifestyles, for instance by participating in sports activities, attending gym sessions and other activities like Zumba. Thus, slower value growth was witnessed in weight loss supplements in 2017. Many consumers perceive it to be healthier to opt for natural weight loss progress instead of consuming weight loss supplements.

Meanwhile, the improving literacy rate with more Malaysians in formal education has led to a rising number of consumers who prefer to obtain weight loss supplements from medical practitioners' prescriptions. This trend resulted in the growth slowdown of OTC weight loss supplements over the review period. Consumers are having their knowledge widened and are generally aware of potential



risks that could be caused by weight loss supplements on the body. Various types of weight loss supplements such as Carbo Block are usually prescribed by healthcare practitioners and not available for OTC purchase. Consumers' perception of weight loss supplements could change over time. On the one hand, increasing numbers of consumers are predicted to engage in healthier lifestyles comprised of clean eating and exercise for weight loss purposes. On the other hand, consumers who prefer to take weight loss supplements are likely to search for options prescribed by medical practitioners.

## Competitive landscape

### **Direct sellers top sales with wide distribution networks**

Weight management and wellbeing in Malaysia is led by leading multinational direct sellers such as Nu Skin, Herbalife Products, HerbalCeutical and Amway. Consumers in Malaysia are highly familiar with the purchase of weight management and wellbeing ranges from direct selling companies. Apart from their proven record and the effect of their weight management and wellbeing products, direct sellers have wide distribution and sales networks across Malaysia.

Nu Skin achieved the strongest sales performance in weight management and wellbeing in 2017. Its targeted solution package, Pharmanex TR90, is a range of highly competitive weight loss supplements. However, consumers' lower purchasing confidence in Malaysia has resulted in a slight drop of its retail value sales.

### **Emergence of new brands in weight management and wellbeing**

A greater number of new brands emerged in weight management and wellbeing during 2017 in conjunction with rising demand among Malaysians. Demand for weight management and wellbeing, in particular supplement nutrition drinks, has surged in Malaysia as the benefits of consuming such products are made clear through brand owners' active marketing. Many new brands are consequently tapping into supplement nutrition drinks due to stronger demand from consumers. Examples of new supplement nutrition drinks brands in Malaysia are Penta Sure and Geria Gold. These claim to provide balanced nutrition to ageing consumers and to be enriched with omega-3 and omega-6 fatty acid.

## Category data

**Table 1 Sales of Weight Management and Wellbeing by Category: Value 2012-2017**

MYR million	2012	2013	2014	2015	2016	2017
Meal Replacement	544.0	551.7	466.6	426.9	409.9	397.6
OTC Obesity	-	-	-	-	-	-
Slimming Teas	29.6	31.3	33.1	35.0	37.5	40.2
Supplement Nutrition Drinks	32.7	34.4	36.2	38.1	40.3	42.8
Weight Loss Supplements	226.2	240.2	258.2	276.3	292.9	307.5
Weight Management and Wellbeing	832.5	857.6	794.1	776.3	780.5	788.0

**Table 2 Sales of Weight Management and Wellbeing by Category: % Value Growth 2012-2017**

% current value growth	2016/17	2012-17 CAGR	2012/17 Total
Meal Replacement	-3.0	-6.1	-26.9
OTC Obesity	-	-	-
Slimming Teas	7.2	6.3	35.9
Supplement Nutrition Drinks	6.2	5.5	30.8
Weight Loss Supplements	5.0	6.3	36.0
Weight Management and Wellbeing	1.0	-1.1	-5.3

**Table 3 NBO Company Shares of Weight Management and Wellbeing: % Value 2013-2017**

% retail value rsp	2013	2014	2015	2016	2017
Nu Skin (M) Sdn Bhd	20.6	25.5	27.4	27.8	27.2
Herbalife Products (M) Sdn Bhd	36.6	24.4	18.8	16.2	13.1
HerbalCeutical Sdn Bhd	6.4	8.1	9.1	9.9	10.4
Amway (M) Sdn Bhd	5.8	7.1	7.4	7.5	7.4
Total Image Regional (M) Sdn Bhd	4.7	5.6	6.3	6.9	7.0
Nutra-Life Health & Fitness (NZ) Ltd	3.7	4.3	4.8	5.1	5.4
21st Century Products Sdn Bhd	4.4	5.2	5.8	6.2	5.3
USANA Health Sciences Sdn Bhd	3.2	3.9	4.2	4.0	3.8
Abbott Laboratories (M) Sdn Bhd	2.2	2.6	2.8	3.0	3.2
Nestlé (M) Bhd	1.0	1.2	1.2	1.3	1.3
Wyeth Nutrition (M) Sdn Bhd	0.7	0.7	0.6	0.6	0.5
Cambridge Mfg Co Ltd	0.2	0.2	0.1	0.1	0.1
Cosway (M) Sdn Bhd	0.5	0.5	0.6	0.6	-
Healthy Image (M) Sdn Bhd	-	-	-	-	-
Wyeth (M) Sdn Bhd	-	-	-	-	-
Heinz (M) Sdn Bhd	-	-	-	-	-
Others	10.0	10.8	10.8	10.8	15.1
Total	100.0	100.0	100.0	100.0	100.0

**Table 4 LBN Brand Shares of Weight Management and Wellbeing: % Value 2014-2017**

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Pharmanex (Nu Skin Enterprises Inc)	Nu Skin (M) Sdn Bhd	25.5	27.4	27.8	27.2
Herbalife (Herbalife Ltd)	Herbalife Products (M) Sdn Bhd	24.4	18.8	16.2	13.1
NH Detoxlim	HerbalCeutical Sdn Bhd	8.1	9.1	9.9	10.4
Total Image	Total Image Regional (M) Sdn Bhd	5.6	6.3	6.9	7.0
Nutra-life (Vitaco Health Ltd)	Nutra-Life Health & Fitness (NZ) Ltd	4.3	4.8	5.1	5.4
21st Century (21st Century Laboratories Inc)	21st Century Products Sdn Bhd	5.2	5.8	6.2	5.3
BodyKey by Nutrilite (Amway Corp)	Amway (M) Sdn Bhd	5.0	5.2	5.3	5.2
Nutrimeal (USANA Health Sciences Inc)	USANA Health Sciences Sdn Bhd	3.9	4.2	4.0	3.8
Nutrilite (Amway Corp)	Amway (M) Sdn Bhd	2.1	2.2	2.3	2.2
Ensure (Abbott Laboratories Inc)	Abbott Laboratories (M) Sdn Bhd	1.7	1.9	2.0	2.1
Glucerna (Abbott Laboratories Inc)	Abbott Laboratories (M) Sdn Bhd	0.6	0.7	0.8	0.9
Nutren (Nestlé SA)	Nestlé (M) Bhd	0.6	0.6	0.7	0.7
Enercal (Nestlé SA)	Wyeth Nutrition (M) Sdn Bhd	0.7	0.6	0.6	0.5
ProSure (Abbott Laboratories Inc)	Abbott Laboratories (M) Sdn Bhd	0.2	0.2	0.2	0.3
Cambridge Diet, The	Cambridge Mfg Co Ltd	0.2	0.1	0.1	0.1
Oriyen (Berjaya Corp Bhd)	Cosway (M) Sdn Bhd	0.5	0.6	0.6	-
Healthy Image	Healthy Image (M) Sdn Bhd	-	-	-	-
Complan (Danone, Groupe)	Heinz (M) Sdn Bhd	-	-	-	-
Tummitrim	Total Image Regional (M) Sdn Bhd	-	-	-	-

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Enercal (Pfizer Inc)	Wyeth (M) Sdn Bhd	-	-	-	-
Enercal (Wyeth)	Wyeth (M) Sdn Bhd	-	-	-	-
Others	Others	11.4	11.4	11.4	15.7
Total	Total	100.0	100.0	100.0	100.0

**Table 5 Forecast Sales of Weight Management and Wellbeing by Category: Value 2017-2022**

MYR million	2017	2018	2019	2020	2021	2022
Meal Replacement	397.6	426.8	431.1	435.0	438.0	440.2
OTC Obesity	-	-	-	-	-	-
Slimming Teas	40.2	42.4	44.7	47.1	49.6	52.2
Supplement Nutrition Drinks	42.8	42.4	43.3	44.2	45.3	46.6
Weight Loss Supplements	307.5	324.7	336.0	346.8	357.2	367.2
Weight Management and Wellbeing	788.0	836.3	855.1	873.0	890.1	906.2

**Table 6 Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2017-2022**

% constant value growth	2017/2018	2017-22 CAGR	2017/22 Total
Meal Replacement	7.4	2.1	10.7
OTC Obesity	-	-	-
Slimming Teas	5.4	5.4	30.0
Supplement Nutrition Drinks	-0.8	1.7	8.9
Weight Loss Supplements	5.6	3.6	19.4
Weight Management and Wellbeing	6.1	2.8	15.0

# Related Company Profiles

## Amway (M) Sdn Bhd in Consumer Health (Malaysia)

### STRATEGIC DIRECTION

- Amway in Malaysia aims to maintain its leading position in consumer health through the active launch of new products, as well as widening its distribution network.
- BodyKey by Nutrilite from Amway continued to gain stronger attention from Malaysians in 2016. Apart from the newly launched BodyKey by Nutrilite, Amway also celebrated its 40th anniversary in Malaysia with a series of events, including a weekend expo hosting more than 20,000 Amway Business Owners (ABOs), as well as their family and friends. The company unveiled a Foundational Trio featuring three Nutrilite bestsellers: Double X Golden Tray; Nutrilite All Plant Protein Powder; and Nutrilite Salmon Omega Complex with Flash Cards.
- Amway in Malaysia is a subsidiary fully-owned by Amway Corp, with its headquarters based in the US. The company runs its business in the format of a direct selling network. Apart from sales made by all Amway Business Owners, the company has also established Amway shops in various geographical locations for easier distribution. Lastly, Amway also encourages more ABOs to set up their own beauty care centres, with Artistry being the major products used in providing services.
- Amway is mainly involved in the marketing and distribution of vitamins and dietary supplements under the brand Nutrilite. Apart from vitamins and dietary supplements the company also markets a wide variety of beauty and personal care products, which comprise bath and shower series from Satinique and Body Series, and colour cosmetics and skin care from Artistry.

### KEY FACTS

#### Summary 1 Amway (M) Sdn Bhd: Key Facts

Full name of company:	Amway (M) Sdn Bhd
www:	//www.amway.my/
Activities:	Marketer and distributor of vitamins and dietary supplements

#### Summary 2 Amway (M) Sdn Bhd: Operational Indicators

Year end December	2013	2014	2015
Net sales	MYR834.2 million	MYR855.8 million	MYR1.0 billion
Net profit	MYR109.0 million	MYR99.8 million	MYR63.9 million

## COMPETITIVE POSITIONING

- Amway Malaysia managed to maintain the leading position within consumer health in 2016, with an 11% value share. The company has a strong competitive position in vitamins and dietary supplements, ranking first with a 16% value share in 2016. Amway was also ranked fifth in weight management and wellbeing in Malaysia in 2016, with a 7% value share.
- Amway's value share within consumer health dropped marginally in 2016, as a result of the stronger performances shown by its rivals. 2016 was a challenging year for most consumer health players, as many consumers were impacted by the rapid rise in living costs. Thus, many Malaysians considered reducing the amount allocated to the purchase of vitamins and dietary supplements in 2016, since these are not crucial self-remedies. Nonetheless, the share of Amway in weight management and wellbeing increased in 2015 and remained static in 2016, as a positive outcome from the launch of BodyKey by Nutrilite. The BodyKey kit introduced by Nutrilite in 2015 included BodyKey Meal Replacement Shake and some other Nutrilite supplements.
- The company's share sits within a strongly growing category, despite the maturity of vitamins and dietary supplements in Malaysia. In the review period, vitamins and dietary supplements was seen as strongly growing category, with more Malaysians willing to invest in supplements to prevent chronic health problems and to maintain their health. However, this also led vitamins and dietary supplements to attract a large number of new competitors, whether direct selling brands such as USANA and Herbalife or retail brands such as VitaHealth, Blackmores and Kordel's, which are available for sale in major retail outlets such as Guardian and Watson's. Therefore, Amway engages its direct selling network with a word-of-mouth marketing strategy to capture sales.
- Amway concentrates on the marketing of consumer health products, with vitamins and dietary supplements under the Nutrilite brand being its major products. Aside from vitamins and dietary supplements, the company specialises in the distribution of home care products, such as household cleaning agents and eSpring water filters. Last but not least, Amway is responsible in the marketing of beauty and personal care ranges under the brands Artistry, Satinique and Body Series.
- Amway positions itself at the high-end of the consumer health market, with its major brand Nutrilite being one of the premium direct selling brands in vitamins and dietary supplements. Nutrilite vitamins and dietary supplements target middle to high-end consumers via Amway's direct selling network.

**Summary 3 Amway (M) Sdn Bhd: Competitive Position 2016**

Product type	Value share	Rank
Consumer health	10.5%	1
OTC	-	-
Sports nutrition	-	-
Vitamins and dietary supplements	15.7%	1
Weight management and wellbeing	7.4%	5
Herbal/traditional products	2.8%	8
Allergy care	-	-
Paediatric consumer health	3.6%	4



# Bio-Life Marketing (M) Sdn Bhd in Consumer Health (Malaysia)

## STRATEGIC DIRECTION

- Bio-Life Marketing strives to strengthen its presence in Malaysia by launching more varieties of vitamins and dietary supplements. Besides, the company also aims to gain more sales by introducing bundle value packaging. Lastly, Bio-Life aims to widen its distribution network through a larger retail network.
- 2016 was a highly active year for Bio-Life Marketing, with several new launches during the year, for instance Bio-Life CoQ10, Bio-Life TiniTabs and some other products. Bio-Life TiniTabs was one of the most unique and innovative formats in vitamins and dietary supplements, because of the tiny size of the tablets.
- Bio-Life Marketing is part of a growing subsidiary within DKSH in Malaysia. DKSH has its headquarters and is publicly listed in Switzerland. Bio-Life began its operations in Malaysia in 1990, with a combined team of nutritionists, biochemists, food technologists and microbiologists.
- Bio-Life’s core business is the manufacturing and marketing of vitamins and dietary supplements. The company is not involved in other businesses, apart from the manufacturing and sale of Bio-Life vitamins and dietary supplements.

## KEY FACTS

### Summary 1 Bio-Life Marketing (M) Sdn Bhd: Key Facts

Full name of company:	Bio-Life Marketing (M) Sdn Bhd
www:	www.biolife.com.my
Activities:	Manufacturer and marketer of vitamins and dietary supplements

## COMPETITIVE POSITIONING

- Bio-Life Marketing was ranked 15th in consumer health in 2016, with a 2% value share. The company is involved primarily in the manufacturing of vitamins and dietary supplements under the brand Bio-Life. Bio-Life is highly popular, covering several categories within vitamins and dietary supplements, such as echinacea, ginkgo biloba, co-enzyme Q10, eye health supplements, calcium supplements, probiotic supplements and many others.
- Bio-Life Marketing’s value share continued to increase in 2016, with the improved performance of the brand in vitamins and dietary supplements. Apart from creating a stronger distribution network, Bio-Life was highly active in new launches within vitamins and dietary supplements. Bio-Life TiniTabs and Bio-Life Kid’s Gummies were amongst the new product launches by Bio-Life in 2015 and 2016. Aside from constant product launches, Bio-Life demonstrated a strong marketing strategy by launching value packaging to attract more sales.

- The company's share sits within a mature but fast growth area, with most of the categories in vitamins and dietary supplements experiencing high growth in Malaysia. However, Bio-Life faces strong competition from many rivals in vitamins and dietary supplements, because of the large number of competitors in the market.
- Bio-Life markets a wide product portfolio, with its main concentration on vitamins and dietary supplements. Some examples of the vitamins and dietary supplements marketed by Bio-Life in Malaysia are Bio-Life CoQ10, Bio-Life Fish Oil, Bio-Life A.B. Junior Pre & Pro, Bio-Life Glucosamine, Bio-Life Evening Primrose Oil & Fish Oil, Bio-Life Livasil and many more.
- The company positions itself within the middle of the market in Malaysia. Bio-Life's products are available through major chemists/pharmacies, including Guardian, Watsons and Caring Pharmacy. Besides pharmacies and healthcare specialist retailers, Bio-Life products are also available for consumers to purchase in certain hypermarkets, such as Tesco.
- Bio-Life is an innovator in the market, through the launch of TiniTabs in vitamins and dietary supplements in Malaysia. TiniTabs EnerVites, TiniTabs B Complex and TiniTabs FemVites were combination dietary supplements and multivitamins made available to consumers in Malaysia during 2016. TiniTabs are basically designed for consumers who encounter difficulties in swallowing, as the tablets are a smaller size than usual.

**Summary 2 Bio-Life Marketing (M) Sdn Bhd: Competitive Position 2016**

Product type	Value share	Rank
Consumer health	1.7%	15
OTC	-	-
Sports nutrition	-	-
Vitamins and dietary supplements	3.0%	9
Weight management and wellbeing	-	-
Herbal/traditional products	2.4%	10
Allergy care	-	-
Paediatric consumer health	-	-

# Cosway (M) Sdn Bhd in Consumer Health (Malaysia)

## STRATEGIC DIRECTION

- Cosway intends to expand its physical presence in Malaysia by extending the coverage of its stockist centres to both Peninsula Malaysia and East Malaysia. The company also plans to include a more diversified range of products to retain consumers’ interest.
- The player was relatively inactive in 2015. As Cosway Pharmacies failed to achieve expected results, many outlets struggled to remain in business.
- Cosway (M) Sdn Bhd is a wholly-owned subsidiary of Berjaya Corp Bhd. The company began operations in December 1979, with headquarters in the centre of in the Golden Triangle, Kuala Lumpur. Berjaya Corp Bhd is a large conglomerate that controls a highly diversified business operation spanning retailing, hotels and resorts, gaming and lottery, foodservice and education and many others.
- The Malaysian subsidiary is purely involved in sales and marketing of consumer health products, especially vitamins and dietary supplements. The range of vitamins and dietary supplements, which comes under brands like Oriyen and Nn, includes evening primrose oil, ginkgo biloba, fish oils/omega fatty acids and glucosamine. In addition, Cosway markets a wide range of home and personal care products, cosmetics and organic food under multiple brands like Powermax, Ecomax, Mildura and Bioglo.

## KEY FACTS

### Summary 1 Cosway (M) Sdn Bhd: Key Facts

Full name of company:	Cosway (M) Sdn Bhd
www:	www.cosway.com.my
Activities:	Marketer and distributor of vitamins and dietary supplements, weight management and herbal/traditional products

## COMPETITIVE POSITIONING

- Cosway, which remained the leading local direct selling company, held a 3% share of retail value sales in consumer health in 2015. The company was ranked fourth in vitamins and dietary supplements with a 6% retail value share. It remained highly competitive within herbal/traditional dietary supplements, especially through evening primrose oil and ginkgo biloba.
- The company’s overall retail value share continued to decline marginally in 2014-2015. This was partly due to the increasing number of competitors in vitamins and dietary supplements, including players with retail outlets.

- The player is present in dynamic area of vitamins and dietary supplements in Malaysia, with large numbers of players competing in this category. Vitamins and dietary supplements continued to register relatively strong sales growth in 2015. This was because consumers embraced preventive measures, such as consuming vitamins and dietary supplements, to lead healthy lifestyles.
- The company positions itself in the mid-priced range of consumer health through the distribution of Nn and Oriyen vitamins and dietary supplements. Consumers are able to purchase Cosway's products through its distribution network, which consists of direct sellers, stockist centres and Cosway Pharmacy outlets.
- In Malaysia, the company is more of a follower than a pioneer in terms of innovation. Cosway's products mainly have lower price points as they targeting the mass base of lower-to-middle-income consumers.

**Summary 2 Cosway (M) Sdn Bhd: Competitive Position 2015**

Product type	% value share	Rank
Consumer health	2.8	7
OTC	-	-
Sports nutrition	-	-
Vitamins and dietary supplements	5.5	4
Weight management	0.4	9
Herbal/traditional products	3.1	7
Allergy care	-	-
Paediatric consumer health	-	-

# HerbalCeutical Sdn Bhd in Consumer Health (Malaysia)

## STRATEGIC DIRECTION

- HerbalCeutical strives to advance its ranking in consumer health with a stronger focus on a beauty positioning in tonics and vitamins and dietary supplements.
- In the future, the company expects to reach out to more consumers by distributing to more outlets, including a larger number of healthcare specialist retailers, such as Guardian and Watson’s, as well as beauty specialist retailers such as Sasa.
- HerbalCeutical is a home-grown consumer health company. It was first established in Malaysia in 1995.
- The company focuses on the marketing of weight management and wellbeing products, as well as vitamins and dietary supplements throughout Malaysia. NH Detoxlim and NH Colla Plus are amongst the most popular ranges manufactured by HerbalCeutical in Malaysia.

## KEY FACTS

### Summary 1 HerbalCeutical Sdn Bhd: Key Facts

Full name of company:	HerbalCeutical Sdn Bhd
www:	//nhdetoxlim.com/about.html
Activities:	Manufacturer, marketer and distributor of weight management and wellbeing products and vitamins and dietary supplements

## COMPETITIVE POSITIONING

- HerbalCeutical was ranked seventh within consumer health in 2016, with a 3% value share. The company held a stronger competitive position in weight management and wellbeing, with NH Detoxlim as its major brand in Malaysia, which accounted for a 10% share of value sales in 2016.
- HerbalCeutical’s value share in consumer health continued to increase in 2016, due to the positive performance of its brands in both vitamins and dietary supplements and weight management and wellbeing. The new range of NH X-Tummy encountered exceptionally strong demand in Malaysia, with positive feedback generated amongst Malaysians. Besides, beauty positioned tonics such as NH Colla Plus and NH Firm Plus managed to maintain steady growth in vitamins and dietary supplements, due to the company’s strong distribution network.
- The company’s share sits within a category which is highly mature, with more consumers switching to healthy eating instead of depending on weight loss supplements. However, HerbalCeutical managed to switch its focus to beauty tonic drinks such as NH Colla Plus and NH Firm Plus.

- HerbalCeutical markets a wide range of weight management and wellbeing products under the ranges NH Detoxlim and NH X-Tummy. Apart from this, the company specialises in manufacturing beauty tonic drinks such as NH Colla Plus, NH Colla Plus Advance and NH Firm Plus.
- HerbalCeutical is positioned in the middle of the market with relatively affordable weight loss supplements and beauty tonics. NH Detoxlim, NH Colla Plus and NH Firm Plus are a few consumer health brands with a weight loss and beauty positioning targeting middle-income consumers in Malaysia.

**Summary 2 HerbalCeutical (M) Sdn Bhd: Competitive Position 2016**

Product type	Value share	Rank
Consumer health	3.3%	7
OTC	-	-
Sports nutrition	-	-
Vitamins and dietary supplements	2.2%	12
Weight management and wellbeing	10.0%	3
Herbal/traditional products	-	-
Allergy care	-	-
Paediatric consumer health	-	-

# Kotra Industries Bhd in Consumer Health (Malaysia)

## STRATEGIC DIRECTION

- Kotra Industries focuses on marketing and promoting the Appeton childcare and adult Appeton Essentials range in Malaysia. The company also searches for opportunities to strengthen its distribution of Appeton Essentials through the brand’s existing network.
- The player, which initially focused on paediatric vitamins and dietary supplements, has expanded into adult vitamins and dietary supplements with Appeton Essentials. Kotra Industries was also highly active in launching new Appeton paediatric supplements to sustain competitiveness. Moreover, Appeton Nutrition Wellness 60+ for seniors was one of the most significant launches in nutrition supplement drinks in 2014. This launch received advertising support.
- Founded in 1982, as a large holding group in Malaysia, Kotra Industries Bhd excelled in nutraceutical and pharmaceutical products. The company was first listed on MESDAQ, Bursa Malaysia in 2000, and it appeared on the Main Board of Bursa Malaysia in 2007. The group’s manufacturing plant with research facility is located in an international technology-driven park in Malacca. The firm has also established a marketing office in Kelana Jaya, Petaling Jaya, near Klang Valley due to its geographical proximity to customers.
- Kotra Industries specialises purely in vitamins and dietary supplements through the Appeton brand in Malaysia. In addition, the company markets an extensive range of prescription drugs, distributed via health clinics and other healthcare formats in Malaysia under the Axcel® and Vaxcel® brands. Axcel® specialises in paediatric care and anti-infectives, dermatology and gastroenterology. Vaxcel® offers a line of products focused on sterile injectables.

## KEY FACTS

### Summary 1 Kotra Industries Bhd: Key Facts

Full name of company:	Kotra Industries Bhd
www:	www.kotrapharma.com
Activities:	Manufacturer, marketer and distributor of OTC and vitamins and dietary supplements

## Summary 2 Kotra Industries Bhd: Operational Indicators

Year end June	2012	2013	2014
Net sales	MYR126.9 million	MYR131.3 million	MYR147.4 million
Net profit	MYR1.1 million	MYR3.7 million	MYR5.7 million

### COMPETITIVE POSITIONING

- Kotra Industries was ranked third in paediatric vitamins and dietary supplements in 2015, with a retail value share of 19%. In multivitamins, it was the 11th-ranked player with a 2% retail value share.
- The company grew its retail value share in paediatric vitamins and dietary supplements towards the end of the review period due to new product launches. Appeton Multivitamin Optigrow Plus was released in 2014. Such activity improved the firm's share in paediatric vitamins and dietary supplements in 2014 and 2015. It was also highly active in marketing and promotional events, such as distributing goodie packs to students in schools, to boost brand awareness.
- Kotra Industries is present in fast-growing paediatric vitamins and dietary supplements in Malaysia. Parents in Malaysia are more willing to spend on these products to help maintain the health condition of their children. However, many players are gradually showing an interest in offering paediatric ranges. For example, Kordel's and Blackmores expanded their paediatric ranges in 2015. The competitive landscape of paediatric vitamins and dietary supplements is increasingly dynamic with more and more players competing in Malaysia.
- The company originally focused on Appeton paediatric vitamins and dietary supplements in Malaysia. In response to rising competition within the country, Appeton has diversified its range of vitamins and dietary supplements for adults. The Appeton Essentials adult range offers multiple types of vitamins and dietary supplements, including options like Appeton Essentials Fish Oil with Omega 3, Appeton Essentials CoQ10 and Appeton Essentials Milk Calcium. Appeton also provides a wide array of paediatric vitamins and dietary supplements: Appeton Multivitamin Plus Infant Drop; Appeton Multivitamin Optigrow; Appeton Multivitamin Hi-Q Taurine; and many others.
- Kotra Industries is positioned at the high-end of paediatric vitamins and dietary supplements in Malaysia. The company was a pioneer in the launch of multivitamins for children, alongside Scott's (GlaxoSmithKline Consumer Healthcare) and Champs (CCM Pharmaceuticals). However, Scott's specialises in fish oils while Champs is more focused on single vitamins. Thus, Appeton remains a leader in multivitamins for children in Malaysia.



**Summary 3 Kotra Industries Bhd: Competitive Position 2015**

Product type	% value share	Rank
Consumer health	0.4	35
OTC	neg	49
Sports nutrition	-	-
Vitamins and dietary supplements	0.8	25
Weight management	-	-
Herbal/traditional products	-	-
Allergy care	-	-
Paediatric consumer health	13.4	3

# Nu Skin (M) Sdn Bhd in Consumer Health (Malaysia)

## STRATEGIC DIRECTION

- Nu Skin focuses on gaining share within consumer health through various famous weight management products, for example the ageLOC TR90 system. In the future, the company is expected to show a stronger focus on marketing by launching more customised weight management products to cater to the different needs of consumers.
- Nu Skin in Malaysia is a wholly-owned subsidiary of Nu Skin Enterprises Inc, located in the US. Nu Skin was first started in Malaysia in 2001, with the head office opened up in the golden triangle area of Malaysia, Kuala Lumpur.
- Nu Skin focuses on the marketing and distribution of weight management and wellbeing products under the Pharmanex brand. Its ageLOC TR90 system, launched to target consumers with a combination of weight management and wellbeing and skin care products, has been highly successful.
- Aside from weight management products, Pharmanex also has a huge range of vitamins and dietary supplements available, for example Pharmanex ProBio PCC and Pharmanex BioGinkgo. On the other hand, Nu Skin also offers ageLOC and Galvanic Home Spa skin care products to consumers in Malaysia.

## KEY FACTS

### Summary 1 Nu Skin (M) Sdn Bhd: Key Facts

Full name of company:	Nu Skin (M) Sdn Bhd
www:	<a href="https://www.nuskin.com/en_MY/home.html">https://www.nuskin.com/en_MY/home.html</a>
Activities:	Marketer and distributor of vitamins and dietary supplements and weight management and wellbeing products

## COMPETITIVE POSITIONING

- Nu Skin was ranked second within consumer health with a 7% value share in 2016. The company led weight management and wellbeing with a 29% value share. Nu Skin also managed to maintain a strong performance in vitamins and dietary supplements, with a 2% share of overall value sales in 2016.
- The share of Nu Skin in consumer health declined marginally in 2016, due to a decline in vitamins and dietary supplements. However, its growing value share in weight management and wellbeing helped to maintain the competitive position of Nu Skin in consumer health. The ageLOC TR90 system has gained strong popularity in Malaysia. Nonetheless, the vitamins and dietary supplements offered by Nu Skin under the Pharmanex brand were less competitive compared with other leading direct selling brands in Malaysia, such as Nutrilite and USANA.

- The bulk of the company's share sits within a rather mature category in Malaysia. Despite weight management and wellbeing previously being considered highly demanded consumer health products, many Malaysians are slowly switching to healthy eating, without relying as heavily on meal replacement. Nevertheless, Nu Skin positions its brand above its rivals in meal replacement, due to its strong brand reputation and new product launches.
- Nu Skin is positioned at the high-end of the market, with its products being priced relatively high. The company's ageLOC TR90 system and Galvanic Home Spa packages are considered as premium direct selling weight management and wellbeing and beauty and personal care ranges in Malaysia. Therefore, the company mainly targets consumers with higher purchasing power in Malaysia.
- The company mainly serves as an innovative leader in the market, by offering packs designed to target different consumer groups. For example, the ageLOC TR90 system combines ageLOC TR90 TrimShake, which is a meal replacement product, ageLOC TR90 CPLEX, which promotes healthy metabolism and lean muscle, ageLOC TR90 Jumpstart and ageLOC TR90 CTP.

**Summary 2 Nu Skin (M) Sdn Bhd: Competitive Position 2016**

Product type	Value share	Rank
Consumer health	7.0%	2
OTC	-	-
Sports nutrition	-	-
Vitamins and dietary supplements	2.1%	13
Weight management and wellbeing	28.6%	1
Herbal/traditional products	3.1%	5
Allergy care	-	-
Paediatric consumer health	-	-

# USANA Health Sciences Sdn Bhd in Consumer Health (Malaysia)

## STRATEGIC DIRECTION

- USANA Health Sciences looks to enhance its direct selling network to reach out to more consumers. The company is expected to advance its sales position in vitamins and dietary supplements through the introduction of new products in forecast period.
- USANA Health Sciences Sdn Bhd is a fully-owned subsidiary established by USANA Health Sciences Inc, originating from the US. The head office of USANA in Malaysia was set up in Petaling Jaya, one of the busiest commercial areas within the Klang Valley in Malaysia.
- The company specialises mainly in the marketing and distribution of consumer health and beauty and personal care products. USANA has a wide selection of vitamins and dietary supplements, ranging from multivitamins to vitamins, co-enzyme Q10 and eye health supplements, as well as other ranges, such as glucosamine.
- Besides, USANA markets a weight management and wellbeing range under the brand Nutrimeal in Malaysia.

## KEY FACTS

### Summary 1 USANA Health Sciences Sdn Bhd: Key Facts

Full name of company:	USANA Health Sciences Sdn Bhd
www:	//www.usana.com
Activities:	Marketer and distributor of vitamins and dietary supplements, weight management and wellbeing products and skin care products

## COMPETITIVE POSITIONING

- USANA Health Sciences ranked fourth within overall consumer health in Malaysia in 2016, with a 5% value share. USANA was the third player in vitamins and dietary supplements, with a value share of 7% in 2016. In the same year USANA held a 4% value share in weight management and wellbeing, with the company ranked eighth.
- USANA’s share continued to rise in the review period, as an outcome of a more aggressive direct selling network engaged to generate sales. The company managed to strengthen its position within vitamins and dietary supplements as a result of this.
- The company’s share sits within a maturing category in consumer health. Vitamins and dietary supplements in Malaysia is approaching maturity, with a large number of players competing. Malaysia is awash with a wide variety of brands in vitamins and dietary supplements, whether from direct selling players such as Amway, Elken and Nu Skin, or brands found within chemists/pharmacies, for instance Blackmores, Kordel’s and Bio-Life. Nevertheless, vitamins and dietary supplements in Malaysia still has room for growth in the future, as consumers are showing rising health-consciousness, with many actively seeking health supplements to prevent health problems.

- USANA markets a wide product portfolio, with its specialisation being in vitamins and dietary supplements. Amongst all its vitamins and dietary supplements, USANA Ao Pro is amongst the most significant products for the company, with strong demand seen in the country.
- USANA positions itself at the higher-end of the market, with its vitamins and dietary supplements offered at relatively high prices. Vitamins and dietary supplements marketed by USANA are targeted towards middle- to high-income consumers. Its products compete directly with rivals such as Amway, Elken and Nu Skin.
- The company is a follower in terms of the products it manufactures. Most of its products appear to be similar to other vitamins and dietary supplements in Malaysia.

**Summary 2 USANA Health Sciences Sdn Bhd: Competitive Position 2016**

Product type	Value share	Rank
Consumer health	4.7%	4
OTC	-	-
Sports nutrition	-	-
Vitamins and dietary supplements	6.6%	3
Weight management and wellbeing	4.1%	8
Herbal/traditional products	-	-
Allergy care	-	-
Paediatric consumer health	-	-

# Consumer Health in Singapore (executive summary)

## **Consumer health achieves steady value growth in 2017**

Consumer health in Singapore continued to post solid current value growth in 2017. Hectic lifestyles have resulted in an increasing number of people suffering from ailments including headaches, poor eating habits and sleeping disorders. Consequently, this boosted demand for OTC products, such as analgesics, digestive remedies and sleep aids. Consumer health also benefited from the health and wellness trend. Vitamins and dietary supplements achieved upbeat growth, as an increasing number of consumers sought these products for well-balanced living. On the other hand, a growing proportion of them are also showing an avid interest in sports nutrition, as they adopt active lifestyles to remain fit and healthy. However, consumer health in Singapore recorded a marginally slower value growth rate compared with 2016, as manufacturers and retailers engaged in price discounting and bundle deals to attract consumers in a highly competitive environment.

## **New product development to meet consumers' changing needs**

The modern lifestyles adopted by Singaporeans present opportunities for new product development in consumer health. For instance, demand for packaging that offers greater convenience increased in 2017 in response to increasingly hectic lifestyles. This supported manufacturers that packaged their products in sachet format, which offers greater convenience for consumers on the go. Some examples include Gaviscon Liquid Sachet and Nin Jiom Pei Pa Koa Convenient Pack. Moreover, consumers are also demanding non-prescription medicines that provide quicker relief to resume their daily activities. Several products have already emerged to address this need, such as Reckitt Benckiser's Nurofen Express and Telfast from Sanofi-Aventis.

## **Players compete with aggressive marketing efforts**

Consumer health remained highly fragmented in Singapore, with none of the players holding double-digit value share in 2017. In an attempt to gain share, manufacturers primarily focused on marketing campaigns to communicate the quality of products and boost consumers' confidence regarding a brand. This was done through both traditional and modern methods of advertising. For instance, the Swisse brand was heavily advertised on television, while collaborating with local celebrity Rebecca Lim to promote the products on her Instagram account. This intensive approach to advertising has resulted in local consumers having a better understanding of the benefits of consumer health products, contributing significantly to value growth.

## **Drugstores/parapharmacies leads, while non-store retailing continues to thrive**

Drugstores/parapharmacies continued to be the most important distribution channel for consumer health in 2017, benefiting from its well-established and large network of outlets. The channel is especially strong in OTC and vitamins and dietary supplements, as it focuses on enhancing its offerings as the competition increases. Guardian, for instance, launched a mobile application in 2017. The new app, MyDoc, enables users to ask health-related questions that will be answered by the Guardian Pharmacists. This allows Guardian to better engage with its consumers, and in turn boost sales of OTC products available in stores.

Meanwhile, direct selling and internet retailing also showed good development in 2017. High levels of discounting and promotions in Singapore has conditioned consumers to constantly search for cheaper products and discounts online. This distribution channel is especially strong in sports

nutrition, as online retailers such as The Supplement Warehouse and Fitlion offer a variety of brands, while offering price discounts and bundle deals to entice consumers. On the other hand, there is also a significant presence of direct sellers in consumer health. Amidst the economic downturn, an increasing number of consumers are looking for second jobs to earn extra income. This therefore helps to expand the networks for direct sellers, and with a larger pool of distributors, it helps to maintain the share of direct sellers with Nu Skin Enterprises, Herbalife International and Amway holding leading positions within overall consumer health.

**Consumer health to post modest growth over the forecast period**

Consumer health is expected to grow over the forecast period. The Singapore population is expected to move towards self-medication as they become better informed about the OTC products that treat their illnesses, due to marketing efforts such as the mobile application MyDoc, launched by Guardian. Nevertheless, demand for paediatric OTC products is likely to remain low, as many parents still prefer to take their child to a doctor for a more accurate diagnosis. Many Singaporeans are paying greater attention to healthy ageing, which results in an increase in the consumption of vitamins and dietary supplements to replenish nutrients missing from their diet. In addition, a significant proportion of people are engaging in sports, which leads them to having a greater interest in sports nutrition. The health and wellness trend is also expected to encourage many consumers to opt for herbal/traditional products which they perceive as more natural, and, thus, healthier.

**Market indicators**

**Table 1 Consumer Expenditure on Health Goods and Medical Services: Value 2012-2017**

SGD million	2012	2013	2014	2015	2016	2017
Pharmaceuticals, medical appliances/equipment	2,700.6	2,966.4	3,169.4	3,334.3	3,392.7	3,547.6
Outpatient services	4,176.3	4,445.7	4,634.4	4,760.7	4,806.0	4,987.5
Hospital services	2,341.8	2,554.6	2,706.6	2,828.7	2,822.8	2,893.5
Total	9,218.7	9,966.6	10,510.4	10,923.6	11,021.5	11,428.7

**Table 2 Life Expectancy at Birth 2012-2017**

years	2012	2013	2014	2015	2016	2017
Males	79.8	80.1	80.3	80.4	80.6	80.9
Females	84.3	84.5	84.8	84.9	85.0	85.2

## Market data

**Table 3 Sales of Consumer Health by Category: Value 2012-2017**

SGD million	2012	2013	2014	2015	2016	2017
OTC	179.3	186.6	194.6	202.6	209.5	215.9
Sports Nutrition	78.1	82.0	85.8	89.3	92.2	95.0
Vitamins and Dietary Supplements	429.9	444.5	464.6	487.6	509.7	531.4
Weight Management and Wellbeing	59.6	61.8	64.6	67.8	70.7	73.6
Herbal/Traditional Products	268.1	273.1	282.0	292.4	301.7	311.0
Allergy Care	3.1	3.2	3.3	3.4	3.5	3.6
Paediatric Consumer Health	20.3	21.1	22.0	22.9	23.9	24.8
Consumer Health	746.9	774.9	809.6	847.3	882.2	916.0

Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing. Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements. Note 3: 2017 data is provisional and based on part-year estimates.



**Table 4 Sales of Consumer Health by Category: % Value Growth 2012-2017**

% current value growth	2016/17	2012-17 CAGR	2012/17 Total
OTC	3.1	3.8	20.4
Sports Nutrition	3.0	4.0	21.7
Vitamins and Dietary Supplements	4.3	4.3	23.6
Weight Management and Wellbeing	4.1	4.3	23.4
Herbal/Traditional Products	3.1	3.0	16.0
Allergy Care	3.4	3.1	16.7
Paediatric Consumer Health	3.9	4.1	22.2
Consumer Health	3.8	4.2	22.6

Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing. Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements. Note 3: 2017 data is provisional and based on part-year estimates.

**Table 5 NBO Company Shares of Consumer Health: % Value 2013-2017**

% retail value rsp	2013	2014	2015	2016	2017
General Nutrition Centers Inc	6.3	6.8	6.9	6.9	6.9
Cerebos Pacific Ltd	4.9	4.8	4.9	5.1	5.2
Nu Skin Enterprises Singapore Pte Ltd	3.9	3.9	3.9	3.9	3.9
Herbalife International Singapore Pte Ltd	4.1	3.9	3.9	3.9	3.9
Amway (S) Pte Ltd	3.7	3.7	3.7	3.7	3.8
GlaxoSmithKline Singapore Pte Ltd	4.0	4.0	3.7	3.6	3.5
Bayer (South East Asia) Pte Ltd	2.9	3.0	3.0	3.0	3.0
USANA Health Sciences Singapore Pte Ltd	2.8	2.7	2.6	2.6	2.6
Reckitt Benckiser (S) Pte Ltd	2.2	2.2	2.3	2.4	2.4

% retail value rsp	2013	2014	2015	2016	2017
Wyeth Pharmaceuticals (Singapore) Pte Ltd	1.9	2.0	2.2	2.3	2.3
Kordel's Ltd	2.1	2.1	2.1	2.1	2.1
Ricola Asia Pacific Pte Ltd	1.9	1.9	1.8	1.8	1.8
Lofthouse of Fleetwood Ltd	1.7	1.7	1.7	1.6	1.6
Blackmores (S) Pte Ltd	1.3	1.4	1.5	1.5	1.6
Optimum Nutrition Inc	1.5	1.5	1.5	1.5	1.6
Haw Par Healthcare Ltd	1.3	1.4	1.4	1.4	1.5
Eu Yan Sang (S) Pte Ltd	1.4	1.5	1.5	1.5	1.5
Dymatize Enterprises LLC	1.4	1.4	1.4	1.4	1.4
Status Sports Pte Ltd	0.7	1.0	1.2	1.3	1.2
Hisamitsu Pharmaceutical Co Inc	0.8	0.9	0.9	1.0	1.0
21st Century Healthcare Pte Ltd	1.0	1.0	1.0	1.0	1.0
Ocean Healthcare (S) Pte Ltd	0.8	0.9	0.9	0.9	1.0
Byron & Co Pte Ltd	0.5	0.7	0.7	0.8	0.9
Johnson & Johnson Pte Ltd	0.9	0.9	0.8	0.8	0.8
Elken (S) Pte Ltd	1.1	0.9	0.9	0.8	0.8
Nin Jiom Medicine Mfy (S) Pte Ltd	0.7	0.8	0.7	0.7	0.7
Procter & Gamble (S) Pte Ltd	0.3	0.3	0.4	0.6	0.7
VitaHealth Asia Pacific (S) Pte Ltd	0.9	0.8	0.8	0.7	0.7
iNova Pharmaceuticals (S) Pte Ltd	0.6	0.6	0.6	0.6	0.6
Kalbe Farma Tbk PT	0.5	0.5	0.5	0.5	0.5
Other Private Label	0.5	0.5	0.5	0.4	0.4
Others	41.3	40.6	39.9	39.5	39.2
Total	100.0	100.0	100.0	100.0	100.0

**Table 6 LBN Brand Shares of Consumer Health: % Value 2014-2017**

% retail value rsp	Company (NBO)	2014	2015	2016	2017
GNC	General Nutrition Centers Inc	6.8	6.9	6.9	6.9
Herbalife (Herbalife Ltd)	Herbalife International Singapore Pte Ltd	3.9	3.9	3.9	3.9
Nutrilite (Amway Corp)	Amway (S) Pte Ltd	3.6	3.6	3.7	3.7
Brand's (Suntory Holdings Ltd)	Cerebos Pacific Ltd	3.3	3.3	3.5	3.6
USANA (USANA Health Sciences Inc)	USANA Health Sciences Singapore Pte Ltd	2.7	2.6	2.6	2.6
Pharmanex (Nu Skin Enterprises Inc)	Nu Skin Enterprises Singapore Pte Ltd	2.2	2.2	2.2	2.2
Panadol (GlaxoSmithKline Plc)	GlaxoSmithKline Singapore Pte Ltd	2.3	2.2	2.2	2.2
Kordel's (Bionor Pharma ASA)	Kordel's Ltd	2.1	2.1	2.1	2.1
Ricola (Ricola AG)	Ricola Asia Pacific Pte Ltd	1.9	1.8	1.8	1.8
Redoxon (Bayer AG)	Bayer (South East Asia) Pte Ltd	1.6	1.6	1.6	1.6
Fisherman's Friend	Lofthouse of Fleetwood Ltd	1.7	1.7	1.6	1.6
Lifepak (Nu Skin Enterprises Inc)	Nu Skin Enterprises Singapore Pte Ltd	1.6	1.6	1.6	1.6
Blackmores (Blackmores Ltd)	Blackmores (S) Pte Ltd	1.4	1.5	1.5	1.6
Optimum Nutrition (Glanbia Plc)	Optimum Nutrition Inc	1.5	1.5	1.5	1.6
Eu Yan Sang (Eu Yan Sang International Ltd)	Eu Yan Sang (S) Pte Ltd	1.5	1.5	1.5	1.5
Dymatize (Post Holdings Inc)	Dymatize Enterprises LLC	1.4	1.4	1.4	1.4
Tiger Balm (Haw Par Corp Ltd)	Haw Par Healthcare Ltd	1.2	1.2	1.3	1.3
Maxinutrition (GlaxoSmithKline Plc)	Status Sports Pte Ltd	1.0	1.2	1.3	1.2
Centrum (Pfizer Inc)	Wyeth Pharmaceuticals (Singapore) Pte Ltd	1.0	1.0	1.1	1.1
Salonpas	Hisamitsu Pharmaceutical Co Inc	0.9	0.9	1.0	1.0

% retail value rsp	Company (NBO)	2014	2015	2016	2017
21st Century (21st Century Laboratories Inc)	21st Century Healthcare Pte Ltd	1.0	1.0	1.0	1.0
Glow	Byron & Co Pte Ltd	0.7	0.7	0.8	0.9
Elken (Elken Sdn Bhd)	Elken (S) Pte Ltd	0.9	0.9	0.8	0.8
Strepsils (Reckitt Benckiser Group Plc (RB))	Reckitt Benckiser (S) Pte Ltd	0.7	0.7	0.8	0.8
Ocean Health (Ocean Healthcare Laboratories Inc)	Ocean Healthcare (S) Pte Ltd	0.7	0.7	0.7	0.8
Diffiam (Valeant Pharmaceuticals International Inc)	iNova Pharmaceuticals (S) Pte Ltd	0.6	0.6	0.6	0.6
VitaHealth (Vita Life Sciences Ltd)	VitaHealth Asia Pacific (S) Pte Ltd	0.7	0.6	0.6	0.6
Nature's Way (Dr Willmar Schwabe GmbH & Co KG)	Bayer (South East Asia) Pte Ltd	0.6	0.6	0.6	0.6
Woods'	Kalbe Farma Tbk PT	0.5	0.5	0.5	0.5
Berocca (Bayer AG)	Bayer (South East Asia) Pte Ltd	0.4	0.5	0.5	0.5
Other Private Label (Private Label)	Other Private Label	0.5	0.5	0.4	0.4
Others	Others	49.4	48.9	48.5	48.2
Total	Total	100.0	100.0	100.0	100.0

**Table 7 Penetration of Private Label in Consumer Health by Category: % Value 2012-2017**

% retail value rsp	2012	2013	2014	2015	2016	2017
Consumer Health	1.2	1.0	0.8	0.8	0.8	0.7
Herbal/Traditional Products	0.2	0.1	0.1	0.1	0.1	0.1
OTC	1.0	0.8	0.8	0.7	0.7	0.6
Paediatric Consumer Health	1.6	0.6	0.3	0.2	0.2	0.2
Vitamins and Dietary Supplements	1.7	1.4	1.2	1.1	1.1	1.0

**Table 8 Distribution of Consumer Health by Format: % Value 2012-2017**

% retail value rsp	2012	2013	2014	2015	2016	2017
Store-Based Retailing	77.0	77.5	76.9	76.6	75.6	74.7
- Grocery Retailers	13.6	13.4	13.4	13.2	12.9	12.6
-- Modern Grocery Retailers	9.3	9.3	9.3	9.2	9.0	8.9
--- Convenience Stores	1.2	1.2	1.2	1.2	1.2	1.1
--- Discounters	0.0	0.0	0.0	0.0	0.0	0.0
--- Forecourt Retailers	0.1	0.1	0.1	0.1	0.1	0.1
--- Hypermarkets	2.1	2.1	2.1	2.0	2.0	1.9
--- Supermarkets	5.9	5.9	5.9	5.8	5.7	5.7
-- Traditional Grocery Retailers	4.3	4.1	4.1	4.0	3.9	3.7
--- Food/drink/tobacco specialists	1.1	1.1	1.1	1.0	1.0	1.0
--- Independent Small Grocers	2.2	2.1	2.1	2.0	2.0	1.9
--- Other Grocery Retailers	1.0	1.0	1.0	0.9	0.9	0.9
---- Healthfood shops	0.9	0.9	0.9	0.9	0.8	0.8
---- Other Other Grocery Retailers	0.1	0.1	0.1	0.1	0.1	0.1
- Mixed Retailers	1.2	1.3	1.3	1.3	1.3	1.3
-- Department Stores	1.2	1.3	1.3	1.3	1.3	1.3
-- Mass Merchandisers	0.0	0.0	0.0	0.0	0.0	0.0
-- Variety Stores	0.0	0.0	0.0	0.0	0.0	0.0
-- Warehouse Clubs	0.0	0.0	0.0	0.0	0.0	0.0
- Non-Grocery Specialists	62.2	62.8	62.1	62.1	61.4	60.7
-- Health and Beauty Specialist Retailers	60.8	61.4	60.7	60.8	60.4	59.8
--- Beauty Specialist Retailers	0.2	0.2	0.2	0.2	0.2	0.2
--- Chemists/Pharmacies	5.6	5.7	5.7	5.8	5.8	5.9
--- Optical Goods Stores	0.0	0.0	0.0	0.0	0.0	0.0

% retail value rsp	2012	2013	2014	2015	2016	2017
--- Drugstores/parapharmacies	40.7	40.7	40.5	40.6	40.4	40.1
--- Other Healthcare Specialist Retailers	14.2	14.9	14.3	14.3	14.0	13.6
-- Other Non-Grocery Specialists	1.5	1.4	1.4	1.3	1.0	0.9
Non-Store Retailing	23.0	22.5	23.1	23.4	24.4	25.3
- Vending	0.0	0.0	0.0	0.0	0.0	0.0
- Homeshopping	0.0	0.0	0.0	0.0	0.0	0.0
- Internet Retailing	3.2	3.4	4.5	4.9	5.4	6.0
- Direct Selling	19.8	19.1	18.6	18.5	18.9	19.3
Total	100.0	100.0	100.0	100.0	100.0	100.0

**Table 9 Distribution of Consumer Health by Format and Category: % Value 2017**

% retail value rsp	OTC	SN	VDS	WMW	HTP	AC	PCH
Store-Based Retailing	98.5	71.0	69.3	48.2	77.5	99.0	74.0
- Grocery Retailers	36.5	0.0	6.8	0.9	17.9	56.2	9.4
-- Modern Grocery Retailers	24.3	0.0	5.4	0.0	12.5	37.5	7.1
--- Convenience Stores	4.6	0.0	0.1	0.0	1.8	7.9	0.5
--- Discounters	0.0	0.0	0.0	0.0	0.0	0.0	0.0
--- Forecourt Retailers	0.4	0.0	0.0	0.0	0.2	0.7	0.0
--- Hypermarkets	4.5	0.0	1.5	0.0	2.6	6.1	1.9
--- Supermarkets	14.8	0.0	3.8	0.0	8.0	22.7	4.7
-- Traditional Grocery Retailers	12.2	0.0	1.4	0.9	5.3	18.8	2.3
--- Food/drink/tobacco specialists	4.1	0.0	0.0	0.0	1.6	7.3	0.3
--- Independent Small Grocers	7.1	0.0	0.4	0.0	2.7	10.1	1.1
--- Other Grocery Retailers	0.9	0.0	1.0	0.9	1.0	1.4	0.9
---- Healthfood shops	0.5	0.0	1.0	0.9	0.9	0.9	0.9

% retail value rsp	OTC	SN	VDS	WMW	HTP	AC	PCH
---- Other Other Grocery Retailers	0.4	0.0	0.0	0.0	0.1	0.5	0.0
- Mixed Retailers	0.1	0.0	2.3	0.0	1.7	0.1	1.9
-- Department Stores	0.1	0.0	2.3	0.0	1.7	0.1	1.9
-- Mass Merchandisers	0.0	0.0	0.0	0.0	0.0	0.0	0.0
-- Variety Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
-- Warehouse Clubs	0.0	0.0	0.0	0.0	0.0	0.0	0.0
- Non-Grocery Specialists	61.9	71.0	60.3	47.4	58.0	42.7	62.7
-- Health and Beauty Specialist Retailers	61.9	62.0	60.3	47.4	58.0	42.7	62.7
--- Beauty Specialist Retailers	0.0	0.0	0.0	2.5	0.0	0.0	0.0
--- Chemists/Pharmacies	12.1	0.0	4.2	6.8	6.5	12.6	5.5
--- Optical Goods Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0
--- Drugstores/parapharmacies	49.7	0.0	43.7	38.0	42.4	30.1	47.0
--- Other Healthcare Specialist Retailers	0.1	62.0	12.3	0.0	9.0	0.0	10.3
-- Other Non-Grocery Specialists	0.0	9.0	0.0	0.0	0.0	0.0	0.0
Non-Store Retailing	1.5	29.0	30.7	51.8	22.5	1.0	26.0
- Vending	0.0	0.0	0.0	0.0	0.0	0.0	0.0
- Homeshopping	0.0	0.0	0.0	0.0	0.0	0.0	0.0
- Internet Retailing	1.2	29.0	4.2	3.0	3.3	1.0	3.7
- Direct Selling	0.3	0.0	26.5	48.8	19.2	0.0	22.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Key: OTC = over the counter; SN = sports nutrition; VDS = vitamins and dietary supplements; WMW = weight management and wellbeing; HTP = herbal/traditional products; AC = Allergy Care; PCH = paediatric consumer health

**Table 10 Forecast Sales of Consumer Health by Category: Value 2017-2022**

SGD million	2017	2018	2019	2020	2021	2022
OTC	215.9	221.4	226.7	231.9	237.1	242.3
Sports Nutrition	95.0	97.4	99.8	101.8	103.7	105.5
Vitamins and Dietary Supplements	531.4	548.1	564.8	581.3	597.2	612.7
Weight Management and Wellbeing	73.6	75.8	77.9	79.8	81.7	83.5
Herbal/Traditional Products	311.0	317.0	323.2	329.4	335.6	341.5
Allergy Care	3.6	3.7	3.8	3.8	3.9	4.1
Paediatric Consumer Health	24.8	25.5	26.2	26.9	27.5	28.1
Consumer Health	916.0	942.8	969.2	994.8	1,019.7	1,043.9

Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing. Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements. Note 3: 2017 data is provisional and based on part-year estimates.

**Table 11 Forecast Sales of Consumer Health by Category: % Value Growth 2017-2022**

% constant value growth	2017/2018	2017-22 CAGR	2017/22 Total
OTC	2.5	2.3	12.2
Sports Nutrition	2.5	2.1	11.0
Vitamins and Dietary Supplements	3.2	2.9	15.3
Weight Management and Wellbeing	3.0	2.5	13.4
Herbal/Traditional Products	1.9	1.9	9.8
Allergy Care	2.2	2.4	12.7
Paediatric Consumer Health	3.1	2.6	13.5
Consumer Health	2.9	2.7	14.0

Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing. Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements. Note 3: 2017 data is provisional and based on part-year estimates.



## Appendix

### **OTC registration and classification**

- The Health Sciences Authority (HSA) is the body in charge of the registration and classification of drugs in Singapore, with a licence from the Centre for Drug Administration (CDA), which falls under the HSA, being required for the retailing of medicinal products. The CDA was formed in January 2004 through a merger of the Centre for Pharmaceutical Administration (CPA) and the Centre for Drug Evaluation (CDE).
- Medicinal products approved for registration are classified as either prescription-only (POM), pharmacy-only (P) or general sale (GSL). Pharmacy-only medicines require the presence of a pharmacist before they can be dispensed, while general sale medicines can be sold without the presence of a pharmacist.
- There are two types of application for generic drugs: the initial strength of a generic product and the subsequent strength of the generic product that is registered. Generic products must contain the same active substance, be of the same strength and have the same pharmaceutical dosage as reference products in Singapore, which are registered products that have been granted market authorisation. For generic products containing a different salt or ester form of the active substance compared with the reference product, evidence must be submitted to show that the salt does not affect the efficacy or toxicity of the active substance in the reference product.
- Manufacturers must submit dual copies of advertisement drafts, an English translation for advertisements in other languages, evidence of product claims and the licence fee payment. For sales promotions, manufacturers must submit two copies of the proposal, indicating the sales promotion method, venue, promotional materials and draft artwork.
- All advertisements are subject to approval from the HSA. An application for each language version of the advertisement must be submitted and two applications are needed if the advertisement contains a sales promotion message. The manufacturer is issued a permit number upon approval, which must be clearly printed on the advertisement, with the permit lasting for a year and having to be renewed thereafter.

### **Vitamins and dietary supplements registration and classification**

- No licence from the Health Sciences Authority (HSA) is needed for the import and retail of vitamins and dietary supplements, as these products are not subject to pre-market approval. However, importers, manufacturers, distributors and retailers must adhere to health supplement guidelines set out by the HSA.
- Certain vitamins and dietary supplements, such as herbal/traditional medicines, are subject to medical advertising controls. Moreover, vitamins and dietary supplements must not be advertised for any specific medicinal purpose, such as cardiovascular or gastrointestinal disease. Claims which are not substantiated by sufficient scientific evidence are also prohibited.
- Labelling must be prominent and clearly displayed on the product. All product labels must be clearly stated and legible in English. The name, recommended safe dosage, batch reference and relevant precautionary statements must be displayed on the final product or packaging,

regardless of the size and shape. In cases where the size or shape of the product does not permit the full labelling information, inserts or leaflets may be used.

#### **Self-medication/self-care and preventive medicine**

- Singaporeans are generally receptive to self-medication, due to increasing access to a wide range of health information and growing interest in personal health and wellbeing. This coincides with an increasing number of switches from Pharmacy Only Medicine (P) to General Sale List (GSL) over the review period. With an increasing number of non-prescription medicines available on retailers' shelves, this in turn has encouraged consumers to self-diagnose or treat minor ailments at home.
- Although self-medication can be beneficial and convenient for consumers, it still requires additional educational campaigns to ensure consumers are being responsible and taking the correct dosage. Consequently, a significant number of parents still prefer to seek a doctor's advice when their children are ill.

# Dietary Supplements in Singapore

## Headlines

- Dietary supplements records 4% current value growth, reaching SGD357 million in 2017
- Demand increased as consumers strive to move towards healthy ageing
- Glucosamine remains the most dynamic performer with current value growth of 9%
- General Nutrition Centers remains the leading player with a 13% value share in 2017
- Over the forecast period, dietary supplements is predicted to record a value CAGR of 3% at constant 2017 prices, reaching SGD404 million in 2022

## Prospects

### **Consumers purchase dietary supplements for a well-balanced lifestyle**

Dietary supplements recorded healthy growth in 2017. With greater health awareness and exposure to information online, consumers are now familiar with the functions and benefits of major dietary supplements such as fish oil and calcium supplements. They therefore increasingly regard dietary supplements as important as diet and exercise to a well-balanced lifestyle, tending to select different products to address specific concerns.

### **Further segmentation will be effective strategy**

Over the forecast period, dietary supplements is expected to continue to post a strong performance, as a result of the ageing population, increasing health-consciousness and familiarity with its benefits. The growing demand in turn translates opportunities for manufacturers to further segment their products. Manufacturers could look to launch products with a beauty positioning to target female consumers, who are likely to be more conscious of both health and appearance. For instance, the Swisse brand launched its Swisse Ultiboost Hair Skin Nails, and was promoted in stores and television to increase consumer interest.

### **Poor eating habits translates to potential growth for probiotic supplements**

Probiotic supplements is well positioned for future growth. Busy lifestyles have caused many Singaporeans to eat irregular meals or opt for processed and fast food. Such poor eating habits may in turn adversely impact their digestive systems, resulting in gastric ailments and constipation. Nevertheless, consumers have started to pay greater attention to their wellbeing, leading them to look for solutions to improve their gut health. Hence, demand for probiotic supplements is expected to surge over the forecast period. Meanwhile, as the size of probiotic supplements is still relatively small, manufacturers are also expected to increase their marketing efforts to educate Singaporeans about the product benefits to drive sales.

## Competitive landscape

### **Noticeable presence of direct sellers in dietary supplements**

There is a noticeable presence of direct sellers in Singapore, with Amway, Nu Skin Enterprises Singapore and USANA Health Sciences Singapore leading dietary supplements. Due to the poor economic outlook, many Singaporeans tend to feel insecure about their jobs and start looking for

extra ways to make an income. As a result, direct selling companies see a larger pool of independent distributors, which in turn helps to drive sales. Furthermore, the proliferation of internet shopping has also created opportunities for direct sellers to expand their networks. Nu Skin, for instance, actively engages its customers on its Facebook account, including product updates and consumer reviews. By utilising social media, it enables them to extend their reach to millennials.

### **Innovation as a key to growth**

Competition amongst brands of dietary supplements remains highly fragmented in Singapore. Consumers tend to be indecisive when making purchases, especially as brands tend to offer similar products. Therefore, it remains important for brands to differentiate themselves through new product development and aggressive marketing. In 2017, for instance, Ocean Healthcare released the Coco Omega Memory Formula, containing a combination of Omega-3 Fish Oil and Coconut Oil that is clinically proven to nourish the brain. Such combination dietary supplements are gaining in popularity in Singapore, due to busier lifestyles that encourage consumers to prefer a single product that provides multiple benefits. Consequently, combination dietary supplements was one of the best performers in 2017. Over the forecast period, demand for this category is expected to remain strong, as manufacturers are likely to invest in developing products that meet consumers' changing needs.

## Category data

### **Summary 1 Dietary Supplements: Brand Ranking by Positioning 2017**

Positioning	Brand ranking	Brand	GBO
Beauty	1	Kordel's	Bionor Pharma ASA
	2	Nutrilite	Amway Corp
	3	Pharmanex	Nu Skin Enterprises Inc
Bone	1	Caltrate	Pfizer Inc
	2	BioCalth	BioCalth International Corp
	3	Calcium-D Redoxon	Bayer AG
Digestive	1	Avance	Best World International Ltd
	2	Pharmanex	Nu Skin Enterprises Inc
	3	Kordel's	Bionor Pharma ASA
Energy	1	Eu Yan Sang	Eu Yan Sang International Ltd
	2	Nutrilite	Amway Corp
	3	GNC	General Nutrition Centers Inc
Eye Health	1	USANA	USANA Health Sciences Inc
	2	Bausch & Lomb Ocuville Tablets	Valeant Pharmaceuticals International Inc
	3	Kordel's	Bionor Pharma ASA
General Health	1	Nutrilite	Amway Corp
	2	Pharmanex	Nu Skin Enterprises Inc
	3	Herbalife	Herbalife Ltd
Heart Health	1	GNC	General Nutrition Centers Inc
	2	Kordel's	Bionor Pharma ASA
	3	VitaHealth	Vita Life Sciences Ltd
Immune System	1	Eu Yan Sang	Eu Yan Sang International Ltd

Positioning	Brand ranking	Brand	GBO
	2	Nutrilite	Amway Corp
	3	Shaklee	Shaklee Corp
Joint	1	Blackmores	Blackmores Ltd
	2	GNC	General Nutrition Centers Inc
	3	Nature's Way	Dr Willmar Schwabe GmbH & Co KG
Liver Health	1	Blackmores	Blackmores Ltd
	2	GNC	General Nutrition Centers Inc
	3	21st Century	21st Century Laboratories Inc
Memory Health	1	GNC	General Nutrition Centers Inc
	2	Kordel's	Bionor Pharma ASA
	3	VitaHealth	Vita Life Sciences Ltd
Men's Health	1	GNC	General Nutrition Centers Inc
	2	Blackmores	Blackmores Ltd
	3	Kordel's	Bionor Pharma ASA
Mood/Relaxing	1	GNC	General Nutrition Centers Inc
	2	Blackmores	Blackmores Ltd
	3	Kordel's	Bionor Pharma ASA
Sexual Health	1	Eu Yan Sang	Eu Yan Sang International Ltd
	2	GNC	General Nutrition Centers Inc
	3	Kordel's	Bionor Pharma ASA
Women's Health	1	Kordel's	Bionor Pharma ASA
	2	GNC	General Nutrition Centers Inc
	3	VitaHealth	Vita Life Sciences Ltd

**Table 1 Sales of Dietary Supplements by Category: Value 2012-2017**

SGD million	2012	2013	2014	2015	2016	2017
Combination Dietary Supplements	103.3	104.5	108.7	113.6	119.0	125.0
Herbal/Traditional Dietary Supplements	142.9	143.3	147.6	152.4	156.9	161.6
- Combination Herbal/Traditional Dietary Supplements	54.1	54.6	56.7	59.2	61.9	64.9
- Echinacea	2.8	2.8	2.8	2.8	2.8	2.8
- Evening Primrose Oil	10.3	10.8	11.1	11.6	11.8	12.1
- Garlic	1.5	1.5	1.5	1.6	1.6	1.6
- Ginkgo Biloba	6.8	7.1	7.3	7.6	7.9	8.1
- Ginseng	8.1	5.2	4.6	3.9	3.6	3.3
- St John's Wort	0.7	0.6	0.6	0.6	0.6	0.5
- Other Herbal/Traditional Dietary Supplements	58.6	60.6	62.8	65.2	66.8	68.4
-- Celery	0.1	0.1	0.1	0.1	0.1	0.1
-- Other Other Herbal/Traditional Dietary Supplements	58.5	60.6	62.7	65.1	66.8	68.3
Non-Herbal/Traditional Dietary Supplements	157.8	164.0	171.6	179.9	187.7	195.7
- Co-Enzyme Q10	0.7	0.7	0.7	0.7	0.8	0.8
- Combination Non-Herbal/Traditional Dietary Supplements	49.2	49.8	51.9	54.4	57.1	60.1
- Eye Health Supplements	0.3	0.3	0.3	0.3	0.4	0.4
- Fish Oils/Omega Fatty Acids	19.3	20.1	20.9	21.7	22.5	23.3
- Glucosamine	14.1	15.5	17.1	18.7	20.4	22.3
- Minerals	19.5	20.3	21.1	22.1	22.9	23.8
-- Calcium Supplements	17.1	17.8	18.7	19.6	20.5	21.4
-- Mineral Supplements	2.5	2.5	2.5	2.5	2.5	2.5
- Probiotic Supplements	0.8	0.8	0.9	0.9	0.9	1.0
- Protein Supplements	4.2	4.3	4.4	4.6	4.7	4.8

SGD million	2012	2013	2014	2015	2016	2017
- Other Non-Herbal/Traditional Dietary Supplements	49.7	52.0	54.2	56.4	58.0	59.3
-- Lecithin	0.6	0.6	0.6	0.6	0.6	0.6
-- Other Other Non-Herbal/Traditional Dietary Supplements	49.0	51.3	53.5	55.8	57.4	58.7
Dietary Supplements	300.7	307.3	319.2	332.3	344.6	357.3

Note: 2017 data is provisional and based on part-year estimates.

**Table 2 Sales of Dietary Supplements by Category: % Value Growth 2012-2017**

% current value growth	2016/17	2012-17 CAGR	2012/17 Total
Combination Dietary Supplements	5.0	3.9	21.0
Herbal/Traditional Dietary Supplements	3.0	2.5	13.1
- Combination Herbal/Traditional Dietary Supplements	4.8	3.7	19.9
- Echinacea	-1.8	-0.5	-2.3
- Evening Primrose Oil	2.0	3.2	16.9
- Garlic	1.2	1.3	6.9
- Ginkgo Biloba	3.0	3.5	18.8
- Ginseng	-6.9	-16.2	-58.8
- St John's Wort	-4.1	-3.9	-17.9
- Other Herbal/Traditional Dietary Supplements	2.3	3.1	16.7
-- Celery	-0.9	-0.2	-0.9
-- Other Other Herbal/Traditional Dietary Supplements	2.3	3.1	16.7
Non-Herbal/Traditional Dietary Supplements	4.2	4.4	24.0
- Co-Enzyme Q10	1.9	2.5	12.9
- Combination Non-Herbal/Traditional Dietary Supplements	5.2	4.1	22.3



% current value growth	2016/17	2012-17 CAGR	2012/17 Total
- Eye Health Supplements	2.5	2.7	14.4
- Fish Oils/Omega Fatty Acids	3.5	3.9	21.1
- Glucosamine	9.3	9.6	57.9
- Minerals	3.8	4.0	21.9
-- Calcium Supplements	4.3	4.6	25.1
-- Mineral Supplements	-0.7	-0.1	-0.5
- Probiotic Supplements	4.2	3.3	17.7
- Protein Supplements	1.8	2.4	12.4
- Other Non-Herbal/Traditional Dietary Supplements	2.2	3.6	19.4
-- Lecithin	-1.5	-0.2	-1.2
-- Other Other Non-Herbal/Traditional Dietary Supplements	2.2	3.7	19.6
Dietary Supplements	3.7	3.5	18.8

Note: 2017 data is provisional and based on part-year estimates.

**Table 3 Sales of Dietary Supplements by Positioning: % Value 2012-2017**

% retail value rsp	2012	2013	2014	2015	2016	2017
Beauty	0.3	0.5	0.7	0.8	0.9	1.0
Bone	5.7	5.9	5.9	6.0	6.1	6.1
Digestive	0.3	0.3	0.3	0.3	0.3	0.3
Eye Health	0.1	0.1	0.1	0.1	0.1	0.1
General Health	43.0	42.8	42.6	42.5	42.6	42.5
Heart Health	3.2	3.2	3.2	3.1	3.0	3.0
Immune System	1.5	1.5	1.5	1.4	1.4	1.4
Joint	5.6	5.9	6.0	6.0	6.2	6.4
Memory Health	1.5	1.6	1.6	1.6	1.7	1.7
Mood/Relaxing	0.3	0.4	0.4	0.4	0.4	0.4
Women's Health	2.4	2.5	2.5	2.6	2.7	2.8
Other Dietary Supplement Positioning	35.9	35.5	35.3	35.1	34.6	34.3
Total	100.0	100.0	100.0	100.0	100.0	100.0

Note: 2017 data is provisional and based on part-year estimates.

**Table 4 Sales of Fish Oils/Omega Fatty Acids by Type: % Value 2012-2017**

% retail value rsp	2012	2013	2014	2015	2016	2017
Cod liver Oil	5.4	5.3	5.2	5.1	4.9	4.8
Other Marine-based Oils	68.7	68.7	68.7	68.7	68.7	68.7
Plant-based Oils	25.9	26.0	26.1	26.2	26.4	26.5
Total	100.0	100.0	100.0	100.0	100.0	100.0

Note: 2017 data is provisional and based on part-year estimates.

**Table 5 NBO Company Shares of Dietary Supplements: % Value 2013-2017**

% retail value rsp	2013	2014	2015	2016	2017
General Nutrition Centers Inc	11.2	12.6	12.7	12.8	12.8
Amway (S) Pte Ltd	8.4	8.6	8.6	8.7	8.9
Nu Skin Enterprises Singapore Pte Ltd	7.6	7.8	7.9	7.9	7.9
USANA Health Sciences Singapore Pte Ltd	5.8	5.5	5.4	5.5	5.5
Kordel's Ltd	4.0	4.1	4.1	4.1	4.1
Herbalife International Singapore Pte Ltd	3.4	3.1	3.0	3.0	3.1
Blackmores (S) Pte Ltd	2.1	2.3	2.5	2.6	2.7
Wyeth Pharmaceuticals (Singapore) Pte Ltd	1.3	1.3	1.8	1.8	1.9
Ocean Healthcare (S) Pte Ltd	1.6	1.8	1.8	1.8	1.9
Elken (S) Pte Ltd	2.5	1.8	1.8	1.8	1.7
Bayer (South East Asia) Pte Ltd	1.7	1.7	1.7	1.7	1.7
Mannatech Singapore Pte Ltd	1.4	1.2	1.1	1.1	1.0
Best World International Ltd	1.3	1.1	1.0	1.0	0.9
Viva Life Science Pte Ltd	1.1	1.0	1.0	0.9	0.9
21st Century Healthcare Pte Ltd	0.8	0.8	0.7	0.7	0.7
VitaHealth Asia Pacific (S) Pte Ltd	0.9	0.8	0.8	0.7	0.7
Procter & Gamble (S) Pte Ltd	-	-	0.1	0.5	0.6
BioCalth International Corp	0.4	0.5	0.5	0.5	0.5
Korea Ginseng Corp	0.9	0.7	0.6	0.5	0.4
Eu Yan Sang (S) Pte Ltd	0.4	0.4	0.4	0.4	0.4
Cerebos Pacific Ltd	0.8	0.4	0.4	0.4	0.3
Shaklee Products (M) Sdn Bhd	0.6	0.5	0.5	0.4	0.3
GSK Consumer Healthcare	-	-	0.3	0.3	0.3
Herbal Revival Sdn Bhd	0.2	0.2	0.2	0.2	0.3

% retail value rsp	2013	2014	2015	2016	2017
Merck (S) Pte Ltd	0.3	0.3	0.3	0.3	0.3
Creative Network International (S) Pte Ltd	0.3	0.3	0.2	0.2	0.2
GlaxoSmithKline Singapore Pte Ltd	0.2	0.2	0.2	0.2	0.2
Dairy Farm International Holdings Ltd	0.3	0.2	0.2	0.2	0.1
Avenza Pte Ltd	0.8	1.0	0.4	-	-
Fancl Asia (Pte) Ltd	0.5	-	-	-	-
Other Private Label	0.8	0.6	0.7	0.6	0.6
Others	38.4	39.2	38.9	39.2	39.1
Total	100.0	100.0	100.0	100.0	100.0

**Table 6 LBN Brand Shares of Dietary Supplements: % Value 2014-2017**

% retail value rsp	Company (NBO)	2014	2015	2016	2017
GNC	General Nutrition Centers Inc	12.6	12.7	12.8	12.8
Nutrilite (Amway Corp)	Amway (S) Pte Ltd	8.6	8.6	8.7	8.9
USANA (USANA Health Sciences Inc)	USANA Health Sciences Singapore Pte Ltd	5.5	5.4	5.5	5.5
Kordel's (Bionor Pharma ASA)	Kordel's Ltd	4.1	4.1	4.1	4.1
Lifepak (Nu Skin Enterprises Inc)	Nu Skin Enterprises Singapore Pte Ltd	4.0	4.0	4.0	4.0
Pharmanex (Nu Skin Enterprises Inc)	Nu Skin Enterprises Singapore Pte Ltd	3.9	3.9	3.9	3.9
Herbalife (Herbalife Ltd)	Herbalife International Singapore Pte Ltd	3.1	3.0	3.0	3.1
Blackmores (Blackmores Ltd)	Blackmores (S) Pte Ltd	2.3	2.5	2.6	2.7
Elken (Elken Sdn Bhd)	Elken (S) Pte Ltd	1.8	1.8	1.8	1.7
Ocean Health (Ocean Healthcare Laboratories Inc)	Ocean Healthcare (S) Pte Ltd	1.3	1.3	1.3	1.4
Nature's Way (Dr Willmar Schwabe GmbH & Co KG)	Bayer (South East Asia) Pte Ltd	1.2	1.3	1.2	1.2
Caltrate (Pfizer Inc)	Wyeth Pharmaceuticals (Singapore) Pte Ltd	1.1	1.2	1.2	1.2
Avance	Best World International Ltd	1.1	1.0	1.0	0.9
Viva (Westar Nutrition Corp)	Viva Life Science Pte Ltd	1.0	1.0	0.9	0.9
21st Century (21st Century Laboratories Inc)	21st Century Healthcare Pte Ltd	0.8	0.7	0.7	0.7
VitaHealth (Vita Life Sciences Ltd)	VitaHealth Asia Pacific (S) Pte Ltd	0.8	0.8	0.7	0.7
Mannatech (Mannatech Inc)	Mannatech Singapore Pte Ltd	0.8	0.8	0.7	0.7
Imedeen (Pfizer Inc)	Wyeth Pharmaceuticals (Singapore) Pte Ltd	0.2	0.7	0.7	0.7
Swisse (Biostime Inc)	Procter & Gamble (S) Pte Ltd	-	0.1	0.5	0.6

% retail value rsp	Company (NBO)	2014	2015	2016	2017
BioCalth	BioCalth International Corp	0.5	0.5	0.5	0.5
Ocean Health	Ocean Healthcare (S) Pte Ltd	0.4	0.5	0.5	0.5
Redoxon (Bayer AG)	Bayer (South East Asia) Pte Ltd	0.4	0.4	0.5	0.5
Cheong-Kwan-Jang (KT&G Corp)	Korea Ginseng Corp	0.7	0.6	0.5	0.4
Eu Yan Sang (Eu Yan Sang International Ltd)	Eu Yan Sang (S) Pte Ltd	0.4	0.4	0.4	0.4
Ambrotose (Mannatech Inc)	Mannatech Singapore Pte Ltd	0.4	0.4	0.4	0.3
Shaklee (Shaklee Corp)	Shaklee Products (M) Sdn Bhd	0.5	0.5	0.4	0.3
Thomson	Herbal Revival Sdn Bhd	0.2	0.2	0.2	0.3
Seven Seas (Merck KGaA)	Merck (S) Pte Ltd	0.3	0.3	0.3	0.3
CNI (Citra Nusa Insan Cemerlang PT)	Creative Network International (S) Pte Ltd	0.2	0.2	0.2	0.2
Os-Cal (GlaxoSmithKline Plc)	GlaxoSmithKline Singapore Pte Ltd	0.2	0.2	0.2	0.2
Skinbiotics	Avenza Pte Ltd	1.0	0.4	-	-
Other Private Label (Private Label)	Other Private Label	0.6	0.7	0.6	0.6
Others	Others	39.8	39.8	40.0	39.9
Total	Total	100.0	100.0	100.0	100.0

**Table 7 Forecast Sales of Dietary Supplements by Category: Value 2017-2022**

SGD million	2017	2018	2019	2020	2021	2022
Combination Dietary Supplements	125.0	129.7	134.5	139.2	143.8	148.1
Herbal/Traditional Dietary Supplements	161.6	164.9	168.1	171.3	174.2	177.0
- Combination Herbal/Traditional Dietary Supplements	64.9	67.2	69.5	71.8	74.1	76.1
- Echinacea	2.8	2.7	2.7	2.6	2.6	2.5
- Evening Primrose Oil	12.1	12.2	12.3	12.4	12.5	12.6
- Garlic	1.6	1.6	1.6	1.6	1.6	1.7
- Ginkgo Biloba	8.1	8.2	8.4	8.5	8.6	8.7
- Ginseng	3.3	3.2	3.0	2.9	2.9	2.8
- St John's Wort	0.5	0.5	0.5	0.5	0.5	0.4
- Other Herbal/Traditional Dietary Supplements	68.4	69.2	70.1	70.8	71.5	72.2
-- Celery	0.1	0.1	0.1	0.1	0.1	0.1
-- Other Other Herbal/Traditional Dietary Supplements	68.3	69.2	70.0	70.8	71.5	72.1
Non-Herbal/Traditional Dietary Supplements	195.7	201.9	208.3	214.7	221.0	227.4
- Co-Enzyme Q10	0.8	0.8	0.8	0.8	0.8	0.8
- Combination Non-Herbal/Traditional Dietary Supplements	60.1	62.5	65.0	67.4	69.7	72.0
- Eye Health Supplements	0.4	0.4	0.4	0.4	0.4	0.4
- Fish Oils/Omega Fatty Acids	23.3	23.9	24.4	24.9	25.4	25.8
- Glucosamine	22.3	24.1	26.0	27.9	30.0	32.1
- Minerals	23.8	24.4	25.0	25.7	26.5	27.3
-- Calcium Supplements	21.4	22.0	22.6	23.3	24.1	24.9
-- Mineral Supplements	2.5	2.4	2.4	2.4	2.4	2.4
- Probiotic Supplements	1.0	1.0	1.0	1.0	1.1	1.1
- Protein Supplements	4.8	4.8	4.8	4.9	4.9	5.0

SGD million	2017	2018	2019	2020	2021	2022
- Other Non-Herbal/Traditional Dietary Supplements	59.3	60.1	60.9	61.6	62.3	62.9
-- Lecithin	0.6	0.6	0.6	0.6	0.6	0.6
-- Other Other Non-Herbal/Traditional Dietary Supplements	58.7	59.5	60.3	61.0	61.7	62.3
Dietary Supplements	357.3	366.8	376.4	385.9	395.3	404.4

Note: 2017 data is provisional and based on part-year estimates.

**Table 8 Forecast Sales of Dietary Supplements by Category: % Value Growth 2017-2022**

% constant value growth	2017/2018	2017-22 CAGR	2017/22 Total
Combination Dietary Supplements	3.8	3.5	18.5
Herbal/Traditional Dietary Supplements	2.0	1.8	9.5
- Combination Herbal/Traditional Dietary Supplements	3.6	3.3	17.4
- Echinacea	-1.5	-1.7	-8.3
- Evening Primrose Oil	1.0	0.8	4.1
- Garlic	0.9	0.7	3.5
- Ginkgo Biloba	1.8	1.4	7.1
- Ginseng	-5.0	-3.1	-14.6
- St John's Wort	-3.2	-3.7	-17.3
- Other Herbal/Traditional Dietary Supplements	1.3	1.1	5.6
-- Celery	-0.6	-0.6	-3.1
-- Other Other Herbal/Traditional Dietary Supplements	1.3	1.1	5.6
Non-Herbal/Traditional Dietary Supplements	3.2	3.0	16.2
- Co-Enzyme Q10	1.0	1.2	6.4
- Combination Non-Herbal/Traditional Dietary Supplements	4.0	3.7	19.8
- Eye Health Supplements	1.2	1.0	5.1



% constant value growth	2017/2018	2017-22 CAGR	2017/22 Total
- Fish Oils/Omega Fatty Acids	2.5	2.0	10.6
- Glucosamine	8.2	7.6	44.1
- Minerals	2.4	2.8	14.7
-- Calcium Supplements	2.8	3.2	16.8
-- Mineral Supplements	-1.3	-0.9	-4.3
- Probiotic Supplements	2.8	3.0	15.9
- Protein Supplements	0.8	1.0	5.1
- Other Non-Herbal/Traditional Dietary Supplements	1.4	1.2	6.0
-- Lecithin	-0.6	-0.8	-3.9
-- Other Other Non-Herbal/Traditional Dietary Supplements	1.4	1.2	6.1
Dietary Supplements	2.7	2.5	13.2

**Table 9 Dietary Supplements by Positioning, percentage**

<b>Dietary Supplements by Positioning</b>	<b>2012 (%)</b>	<b>2013 (%)</b>	<b>2014 (%)</b>	<b>2015 (%)</b>	<b>2016 (%)</b>	<b>2017 (%)</b>
Beauty	0.3	0.5	0.7	0.8	0.9	1.0
Bone	5.7	5.9	5.9	6.0	6.1	6.1
Digestive	0.3	0.3	0.3	0.3	0.3	0.3
Eye Health	0.1	0.1	0.1	0.1	0.1	0.1
General Health	43.0	42.8	42.6	42.5	42.6	42.5
Heart Health	3.2	3.2	3.2	3.1	3.0	3.0
Immune System	1.5	1.5	1.5	1.4	1.4	1.4
Joint	5.6	5.9	6.0	6.0	6.2	6.4
Memory Health	1.5	1.6	1.6	1.6	1.7	1.7
Mood/Relaxing	0.3	0.4	0.4	0.4	0.4	0.4
Women's Health	2.4	2.5	2.5	2.6	2.7	2.8
Other Dietary Supplement Positioning	35.9	35.5	35.3	35.1	34.6	34.3
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

**Table 10 Dietary Supplements by Positioning, Retail Value MSP in EUR million (Historic Current Prices, Year-on-Year Exchange Rates)**

<b>Dietary Supplements by Positioning</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>
Beauty	0.30	0.52	0.75	0.89	1.04	1.20
Bone	5.80	6.06	6.37	6.69	7.02	7.28
Digestive	0.30	0.31	0.32	0.34	0.35	0.36
Eye Health	0.11	0.11	0.12	0.12	0.12	0.13
General Health	43.50	44.25	45.76	47.52	49.40	51.10
Heart Health	3.27	3.31	3.44	3.47	3.48	3.61
Immune System	1.51	1.52	1.56	1.61	1.65	1.69
Joint	5.68	6.09	6.40	6.71	7.19	7.69
Memory Health	1.55	1.63	1.74	1.84	1.95	2.05
Mood/Relaxing	0.35	0.37	0.41	0.44	0.48	0.51
Women's Health	2.45	2.53	2.69	2.91	3.13	3.33
Other Dietary Supplement Positioning	36.35	36.68	37.87	39.28	40.16	41.26
<b>Total</b>	<b>101.16</b>	<b>103.40</b>	<b>107.41</b>	<b>111.81</b>	<b>115.97</b>	<b>120.21</b>

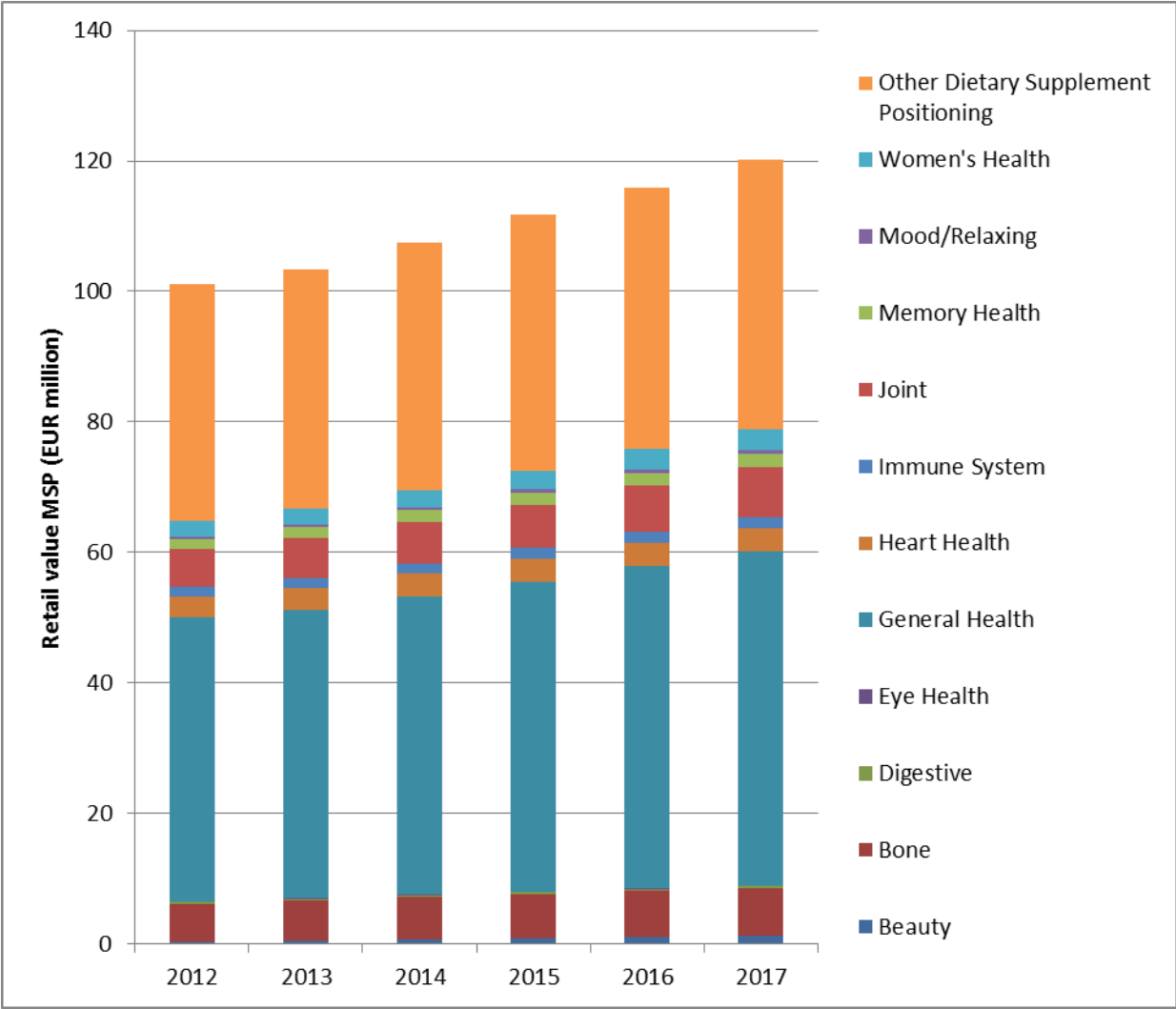
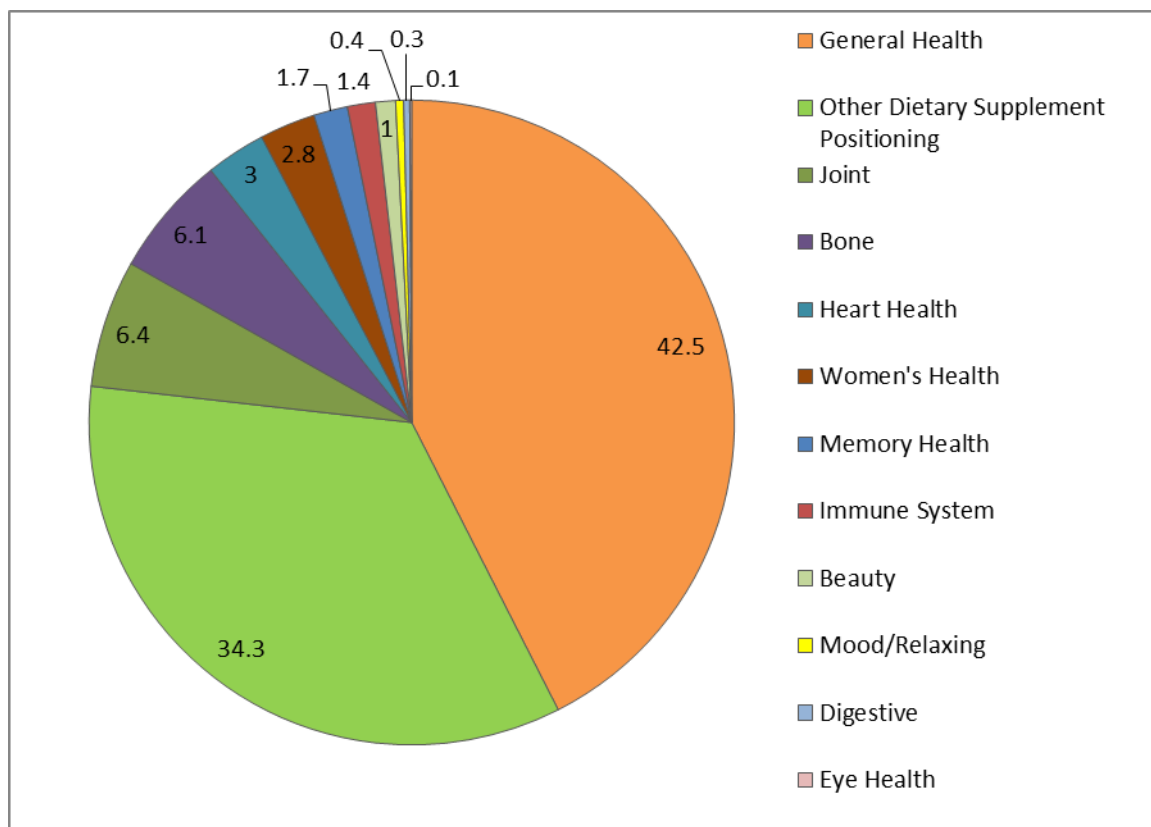


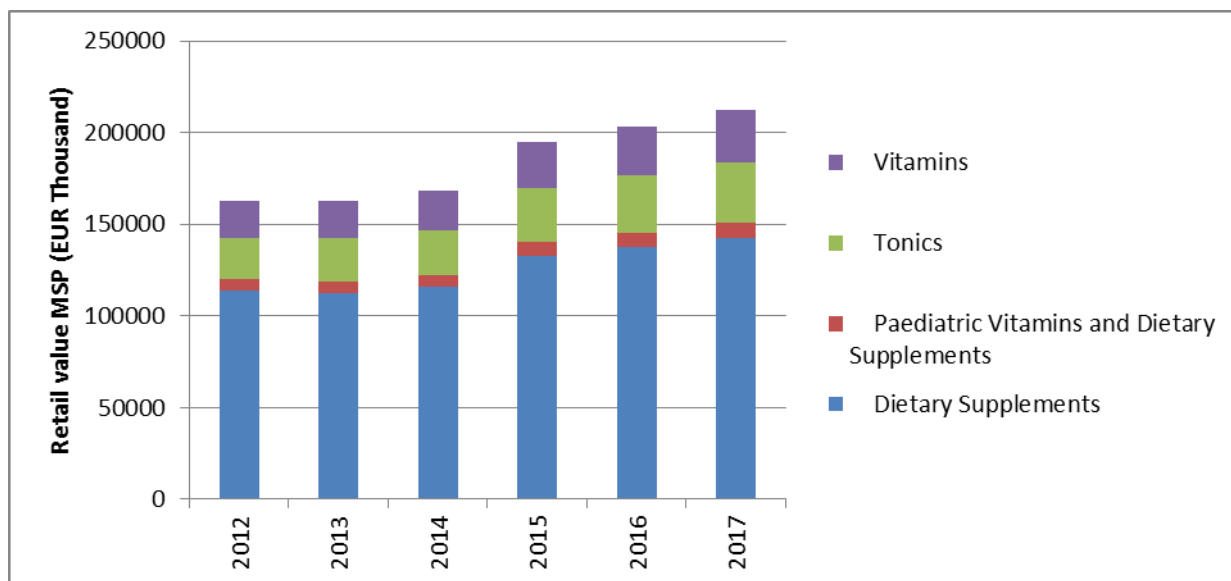
Figure 1 Dietary Supplements by Positioning, Retail Value MSP (EUR million)



**Figure 2 Dietary Supplements by Positioning (%) in 2017**

**Table 11 Retail value MSP (EUR Thousand) for dietary supplements and vitamins, historic values**

Category	2012	2013	2014	2015	2016	2017
Dietary Supplements	114 074.79	112 683.54	115 692.23	132 773.60	137 400.94	142 591.62
Paediatric Vitamins and Dietary Supplements	6 198.40	6 290.13	6 508.81	7 534.66	7 871.13	8 234.97
Tonics	22 360.24	23 253.03	24 635.97	29 197.82	31 171.75	32 924.72
Vitamins	20 463.22	20 764.58	21 540.79	25 334.21	26 749.24	28 340.26
Vitamins and Dietary Supplements Total	163 096.65	162 991.29	168 377.80	194 840.28	203 193.05	212 091.57



**Figure 3 Retail value MSP for dietary supplements and vitamins**

**Table 12 Retail value MSP (EUR Thousand) for dietary supplements and vitamins, prognoses**

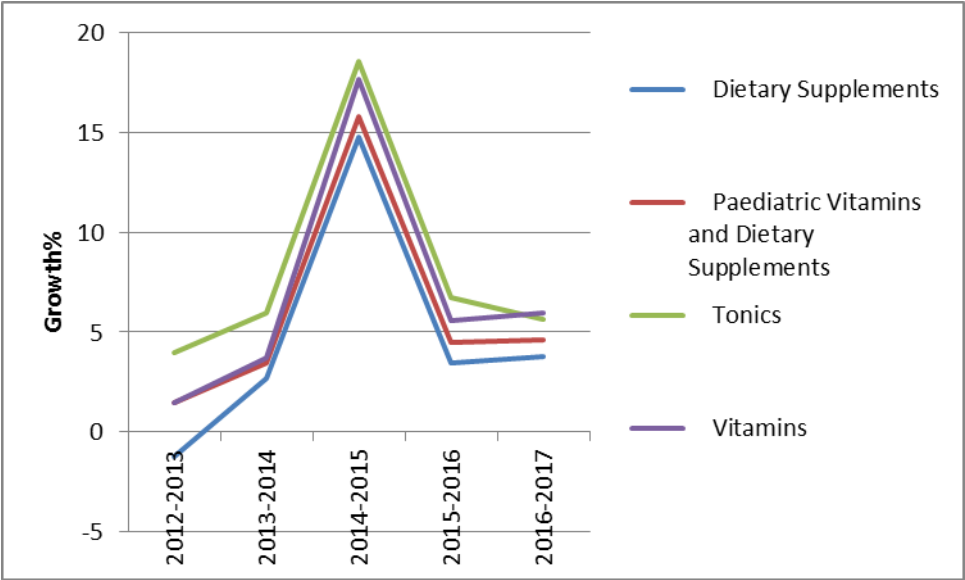
Category	2018	2019	2020	2021	2022
Dietary Supplements	147 552.88	153 040.36	158 542.88	164 651.70	170 554.93
Paediatric Vitamins and Dietary Supplements	8 606.44	8 977.06	9 343.33	9 729.13	10 087.42
Tonics	34 509.46	36 204.83	37 864.95	39 543.60	41 160.02
Vitamins	29 825.17	31 424.01	33 077.92	34 858.76	36 606.67
Vitamins and Dietary Supplements Total	220 493.95	229 646.26	238 829.09	248 783.19	258 409.04

**Table 13 Growth% for dietary supplements and vitamins, historic values**

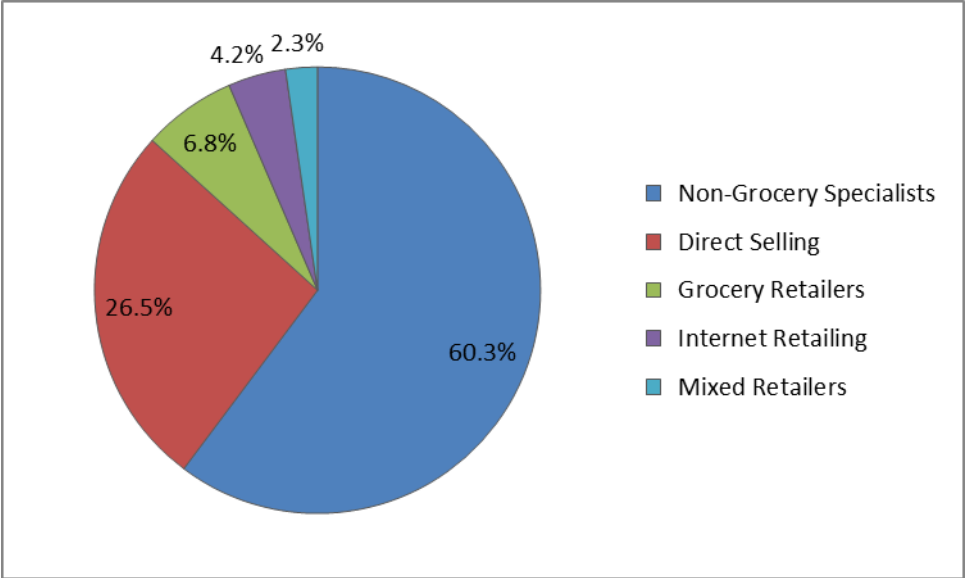
Category	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017
Dietary Supplements	-1.22	2.67	14.76	3.49	3.78
Paediatric Vitamins and Dietary Supplements	1.48	3.48	15.76	4.47	4.62
Tonics	3.99	5.95	18.52	6.76	5.62
Vitamins	1.47	3.74	17.61	5.59	5.95
Vitamins and Dietary Supplements	-0.06	3.30	15.72	4.29	4.38

**Table 14 Growth% for dietary supplements and vitamins, prognoses**

Category	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022
Dietary Supplements	3.96	4.15	4.00	4.17	3.87
Paediatric Vitamins and Dietary Supplements	3.48	3.72	3.60	3.85	3.59
Tonics	4.51	4.31	4.08	4.13	3.68
Vitamins	4.81	4.91	4.59	4.43	4.09
Vitamins and Dietary Supplements	5.24	5.36	5.26	5.38	5.01



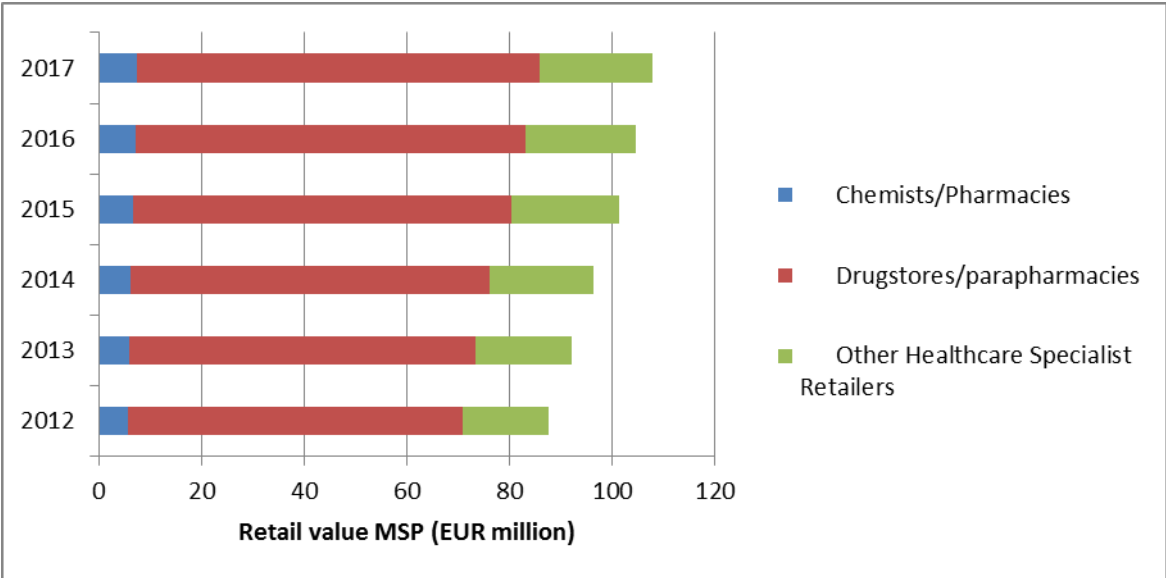
**Figure 4 Growth% for dietary supplements and vitamins**



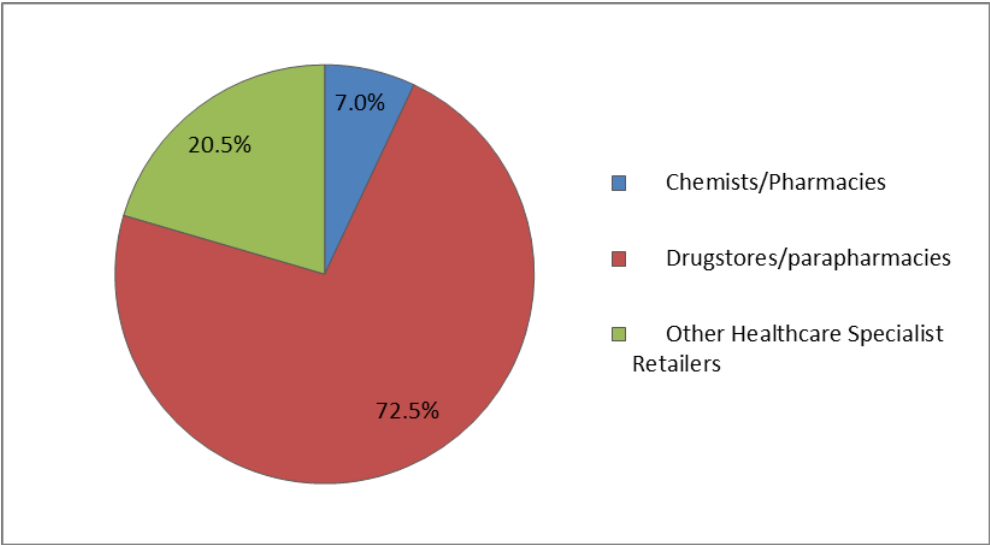
**Figure 5 Distribution by outlet 2017**

**Table 16 Distribution of food supplements by main outlet types, percentage**

Outlet	2012	2013	2014	2015	2016	2017
Grocery Retailers	7.9	7.5	7.6	7.3	7.0	6.8
Mixed Retailers	2.0	2.2	2.3	2.3	2.3	2.3
Non-Grocery Specialists	60.6	61.6	61.7	61.7	61.0	60.3
Internet Retailing	2.0	2.2	2.9	3.4	3.8	4.2
Direct Selling	27.5	26.5	25.6	25.4	25.9	26.5



**Figure 6 Outlet through non-grocery specialists, Retail Value MSP in EUR million (Historic Current Prices, Year-on-Year Exchange Rates)**



**Figure 7 Outlet through non-grocery specialists in 2017**



**Table 15 Distribution of food supplements, retail value MSP in EUR million (Historic Current Prices, Year-on-Year Exchange Rates) and percentage**

Outlet		2012		2013		2014		2015		2016		2017	
		Unit	%	Unit	%	Unit	%	Unit	%	Unit	%	Unit	%
<b>Store-Based Retailing</b>		<b>102.0</b>	<b>70.6</b>	<b>106.7</b>	<b>71.3</b>	<b>111.8</b>	<b>71.5</b>	<b>116.9</b>	<b>71.3</b>	<b>120.6</b>	<b>70.3</b>	<b>124.0</b>	<b>69.3</b>
Modern Grocery Retailers	Convenience Stores	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.1	0.2	0.1	0.2	0.1
	Hypermarkets	2.6	1.8	2.6	1.7	2.7	1.7	2.7	1.6	2.7	1.6	2.7	1.5
	Supermarkets	6.0	4.1	6.0	4.0	6.3	4.0	6.4	3.9	6.6	3.8	6.7	3.8
Traditional Grocery Retailers	Independent Small Grocers	0.9	0.7	0.9	0.6	0.9	0.6	0.8	0.5	0.8	0.4	0.7	0.4
	Healthfood shops	1.8	1.2	1.7	1.1	1.8	1.1	1.9	1.1	1.8	1.1	1.8	1.0
Mixed Retailers	Department Stores	2.9	2.0	3.2	2.2	3.6	2.3	3.8	2.3	3.9	2.3	4.1	2.3
Non-Grocery Specialists	Chemists/Pharmacies	5.6	3.9	5.9	4.0	6.3	4.0	6.8	4.1	7.2	4.2	7.6	4.2
	Drugstores/parapharmacies	65.3	45.2	67.5	45.1	69.9	44.7	73.5	44.8	75.9	44.2	78.2	43.7
	Other Healthcare Specialist Retailers	16.8	11.6	18.7	12.5	20.2	12.9	20.9	12.7	21.5	12.6	22.1	12.3
<b>Non-Store Retailing</b>		<b>42.6</b>	<b>29.4</b>	<b>42.9</b>	<b>28.7</b>	<b>44.5</b>	<b>28.5</b>	<b>47.2</b>	<b>28.7</b>	<b>50.9</b>	<b>29.7</b>	<b>54.8</b>	<b>30.7</b>
Internet Retailing		2.8	2.0	3.3	2.2	4.5	2.9	5.5	3.4	6.5	3.8	7.5	4.2
Direct Selling		39.8	27.5	39.6	26.5	40.0	25.6	41.7	25.4	44.5	25.9	47.4	26.5
<b>Total</b>		<b>144.6</b>	<b>100.0</b>	<b>149.6</b>	<b>100.0</b>	<b>156.3</b>	<b>100.0</b>	<b>164.1</b>	<b>100.0</b>	<b>171.5</b>	<b>100.0</b>	<b>178.8</b>	<b>100.0</b>

# Digestive Remedies in Singapore

## Headlines

- In 2017, digestive remedies declines by 1% in current value terms, falling to SGD18 million
- Increasing number of consumers eat irregular meals and frequently dine out due to increasingly busy lifestyles
- Antacids records strongest current value increase of 5% in 2017
- Reckitt Benckiser retains its leading position with a 22% value share in 2017
- Over the forecast period, digestive remedies is predicted to record a value CAGR of 1% at constant 2017 prices, rising to SGD19 million in 2022

## Prospects

### **Digestive remedies to continue growing**

Digestive remedies is predicted to record positive growth over the forecast period. Demand will continue to be driven by increasingly hectic lifestyles, with a growing number of Singaporeans adopting unhealthy eating habits, resulting in irregular meal times or dining out more frequently. In addition, the diverse range of food available in Singapore can result in overeating and indulging in fried and oily food. Such prolonged eating habits are likely to cause digestive problems including indigestion, stomach upset, heartburn and constipation. Many consumers will therefore seek commonly recognised OTC products, such as antacids and diarrhoeal remedies for quick relief.

### **Digestive remedies to see slower growth over the forecast period**

However, digestive remedies is predicted to post slower value growth than it did over the review period due to several factors. Demand for paediatric digestive remedies is expected to remain low, as most parents prefer to take their child to a doctor for a more accurate diagnosis. Furthermore, the lack of certain products, such as IBS treatments and H2 blockers, hinders consumer awareness, which significantly limits potential demand. Digestive remedies also faces the challenge of being a mature category, with no major new product developments expected over the forecast period.

### **Sales of IBS treatments remain negligible**

Sales of IBS treatments remain negligible in Singapore. Many consumers have learnt that it is a chronic condition that cannot be cured, and the solution is to avoid trigger foods and take regular exercise. Moreover, most consumers are unsure of the OTC treatments available, as OTC products available in the marketplace are mainly used to treat symptoms such as diarrhoea and constipation. Thus, they tend to seek a doctor's advice rather than considering OTC remedies. Over the forecast period, sales of IBS treatments are expected to remain insignificant, especially as there is no known cure for this condition.

## Competitive landscape

### International players dominate digestive remedies

The competitive landscape of digestive remedies is relatively consolidated, with the top four international players, namely Reckitt Benckiser, Valeant Pharmaceuticals International, GlaxoSmithKline Singapore and Sanofi-Aventis Singapore accounting for a dominant share. Domestic company Li Chung Shing Tong ranked fifth. It benefits from its Po Chai pills, which are trusted by many Chinese Singaporeans as a diarrhoeal remedy. The value share of private label, on the other hand, remained insignificant in 2017. Private label products do not have a competitive advantage as they are perceived to be of lower quality and less effective than standard brands.

### Strong marketing activities push sales of Reckitt Benckiser

Reckitt Benckiser strengthened its leading position in digestive remedies, gaining value share in 2017. This can be attributed to its strong presence in antacids and laxatives with the Gaviscon, Fybogel and Senokot brands. In particular, Gaviscon witnessed double-digit growth in 2017. The brand was widely promoted towards the end of the review period, making it highly recognised and accepted by consumers. For instance, Gaviscon Double Action, which is positioned to provide rapid relief from both indigestion and heartburn, was heavily advertised on television. While such advertisements help to increase demand for the brand, it also served to make consumers gradually familiar with antacids. As such, antacids continued to record the fastest current value growth within digestive remedies in 2017.

## Category data

**Table 1 Sales of Digestive Remedies by Category: Value 2012-2017**

SGD million	2012	2013	2014	2015	2016	2017
Paediatric Digestive Remedies	0.3	0.3	0.3	0.3	0.3	0.3
Diarrhoeal Remedies	4.4	4.5	4.7	4.8	5.0	5.2
IBS Treatments	-	-	-	-	-	-
Indigestion and Heartburn Remedies	6.5	6.7	7.0	7.3	7.6	7.2
Laxatives	3.9	4.0	4.2	4.3	4.5	4.6
Motion Sickness Remedies	0.3	0.4	0.4	0.4	0.4	0.4
Digestive Remedies	15.4	15.9	16.6	17.2	17.8	17.7

Note: 2017 data is provisional and based on part-year estimates.

**Table 2 Sales of Digestive Remedies by Category: % Value Growth 2012-2017**

% current value growth	2016/17	2012-17 CAGR	2012/17 Total
Paediatric Digestive Remedies	1.8	2.6	13.9
Diarrhoeal Remedies	3.6	3.2	17.2
IBS Treatments	-	-	-
Indigestion and Heartburn Remedies	-6.0	2.1	10.7
Laxatives	3.0	3.7	19.9
Motion Sickness Remedies	3.6	4.1	22.0
Digestive Remedies	-0.7	2.9	15.2

Note: 2017 data is provisional and based on part-year estimates.

**Table 3 NBO Company Shares of Digestive Remedies: % Value 2013-2017**

% retail value rsp	2013	2014	2015	2016	2017
Reckitt Benckiser (S) Pte Ltd	18.2	18.9	19.8	20.6	22.3
Valeant Pharmaceuticals International Inc	8.8	9.5	9.5	9.8	11.0
GlaxoSmithKline Singapore Pte Ltd	11.6	11.4	11.3	11.3	9.7
Sanofi-Aventis Singapore Pte Ltd	-	-	-	-	9.7
Li Chung Shing Tong (Holdings) Ltd	9.1	8.6	8.7	8.5	8.8
Johnson & Johnson Pte Ltd	7.3	5.0	4.6	3.9	3.2
ICM Pharma Pte Ltd	3.0	3.0	2.9	2.8	2.9
Ipsen SA	2.5	2.5	2.5	2.5	2.6
Merck (S) Pte Ltd	2.6	2.5	2.4	2.4	2.4
Laboratoire du Lacteol du Docteur Boucard	1.9	2.0	2.0	2.0	2.1
Xepa-Soul Pattinson (M) Sdn Bhd	0.9	1.0	1.0	1.0	1.0
CB Fleet Co Inc	1.1	1.0	1.0	1.0	1.0
Bayer (South East Asia) Pte Ltd	0.3	0.2	0.2	0.2	0.2
Dairy Farm International Holdings Ltd	0.2	0.2	0.2	0.2	0.2
SSL Healthcare Singapore Pte Ltd	0.1	0.1	0.1	0.1	0.1
Boehringer Ingelheim Singapore Pte Ltd	9.2	9.3	9.3	9.3	-
Shigaken Pharmaceutical Ind Co	2.3	1.7	1.6	1.1	-
Norgine Ltd	-	-	-	-	-
Merck Sharp & Dohme (IA) Corp	-	-	-	-	-
Wyeth Pharmaceuticals (Singapore) Pte Ltd	-	-	-	-	-
Others	20.9	23.3	22.8	23.4	22.6
Total	100.0	100.0	100.0	100.0	100.0

**Table 4 LBN Brand Shares of Digestive Remedies: % Value 2014-2017**

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Actal	Valeant Pharmaceuticals International Inc	9.5	9.5	9.8	11.0
Gaviscon (Reckitt Benckiser Group Plc (RB))	Reckitt Benckiser (S) Pte Ltd	7.6	8.4	9.2	10.6
Eno (GlaxoSmithKline Plc)	GlaxoSmithKline Singapore Pte Ltd	9.1	9.1	9.1	9.7
Dulcolax (Sanofi)	Sanofi-Aventis Singapore Pte Ltd	-	-	-	9.7
Po Chai	Li Chung Shing Tong (Holdings) Ltd	8.6	8.7	8.5	8.8
Fybogel (Reckitt Benckiser Group Plc (RB))	Reckitt Benckiser (S) Pte Ltd	8.4	8.5	8.4	8.7
Senokot (Reckitt Benckiser Group Plc (RB))	Reckitt Benckiser (S) Pte Ltd	2.9	3.0	3.0	3.1
Smecta	Ipsen SA	2.5	2.5	2.5	2.6
Ultracarbon (Merck KGaA)	Merck (S) Pte Ltd	2.5	2.4	2.4	2.4
Imodium (Johnson & Johnson Inc)	Johnson & Johnson Pte Ltd	2.3	2.3	2.3	2.3
Lactéol Fort	Laboratoire du Lacteol du Docteur Boucard	2.0	2.0	2.0	2.1
Lactus	ICM Pharma Pte Ltd	1.9	1.8	1.7	1.8
Laxarol	ICM Pharma Pte Ltd	1.1	1.1	1.1	1.1
Novomin	Xepa-Soul Pattinson (M) Sdn Bhd	1.0	1.0	1.0	1.0
Fleet	CB Fleet Co Inc	1.0	1.0	1.0	1.0
Stugeron (Johnson & Johnson Inc)	Johnson & Johnson Pte Ltd	0.8	0.8	0.8	0.8
Alka-Seltzer (Bayer AG)	Bayer (South East Asia) Pte Ltd	0.2	0.2	0.2	0.2
Guardian (Private Label)	Dairy Farm International Holdings Ltd	0.2	0.2	0.2	0.2

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Woodward's Gripe Water (Reckitt Benckiser Group Plc (RB))	SSL Healthcare Singapore Pte Ltd	0.1	0.1	0.1	0.1
Dulcolax (Boehringer Ingelheim GmbH)	Boehringer Ingelheim Singapore Pte Ltd	9.3	9.3	9.3	-
Zantac (Aspen Pharmacare Holdings Ltd)	GlaxoSmithKline Singapore Pte Ltd	2.3	2.3	2.2	-
Weisen-U	Shigaken Pharmaceutical Ind Co	1.7	1.6	1.1	-
Mylanta (Johnson & Johnson Inc)	Johnson & Johnson Pte Ltd	1.9	1.5	0.8	-
Zantac (GlaxoSmithKline Plc)	GlaxoSmithKline Singapore Pte Ltd	-	-	-	-
Gelusil (Johnson & Johnson Inc)	Johnson & Johnson Pte Ltd	-	-	-	-
Pepcidine (Johnson & Johnson Inc)	Merck Sharp & Dohme (IA) Corp	-	-	-	-
Normacol (Norgine BV)	Norgine Ltd	-	-	-	-
Woodward's Gripe Water (SSL International Plc)	SSL Healthcare Singapore Pte Ltd	-	-	-	-
Bismag (Wyeth)	Wyeth Pharmaceuticals (Singapore) Pte Ltd	-	-	-	-
Others	Others	23.3	22.8	23.4	22.6
Total	Total	100.0	100.0	100.0	100.0

**Table 5 Forecast Sales of Digestive Remedies by Category: Value 2017-2022**

SGD million	2017	2018	2019	2020	2021	2022
Paediatric Digestive Remedies	0.3	0.3	0.3	0.3	0.3	0.3
Diarrhoeal Remedies	5.2	5.2	5.3	5.3	5.3	5.3
IBS Treatments	-	-	-	-	-	-
Indigestion and Heartburn Remedies	7.2	7.3	7.4	7.4	7.5	7.6
Laxatives	4.6	4.7	4.8	4.9	5.0	5.0
Motion Sickness Remedies	0.4	0.4	0.4	0.4	0.4	0.4
Digestive Remedies	17.7	18.0	18.2	18.4	18.5	18.6

Note: 2017 data is provisional and based on part-year estimates.

**Table 6 Forecast Sales of Digestive Remedies by Category: % Value Growth 2017-2022**

% constant value growth	2017/2018	2017-22 CAGR	2017/22 Total
Paediatric Digestive Remedies	0.7	0.5	2.3
Diarrhoeal Remedies	1.0	0.5	2.7
IBS Treatments	-	-	-
Indigestion and Heartburn Remedies	1.8	1.1	5.6
Laxatives	2.5	1.6	8.3
Motion Sickness Remedies	1.6	1.2	5.9
Digestive Remedies	1.7	1.1	5.4



# Herbal/Traditional Products in Singapore

## Headlines

- In 2017, herbal/traditional products records 3% current value growth, reaching SGD311 million
- Increased preference for naturally healthy products supports growth of herbal/traditional products
- Herbal/traditional topical analgesics posts the strong current value growth of 5%
- Cerebos Pacific leads the category with a 14% value share in 2017
- Herbal/traditional products is predicted to record a value CAGR of 2% at constant 2017 prices, reaching SGD342 million in 2022

## Prospects

### **Herbal/traditional products will continue to record stable growth**

Herbal/traditional products is expected to register stable growth in Singapore over the forecast period. With growing health concerns among Singaporeans, consumers are likely to display a stronger preference for herbal/traditional products, which they perceive to be more natural and fewer side-effects.

### **Demand for naturalness drives demand for herbal/traditional products**

Herbal/traditional sleep aids is expected to be one of the categories to experience strong growth, as many consumers are concerned over long-term consumption of standard sleep aids that could pose health problems linked to negative side-effects. Demand will also be supported by the wide availability of herbal/traditional sleep aids, with melatonin as the most common ingredient. This includes 21st Century Melatonin, GNC Melatonin 3 and Guardian Melatonin 3mg.

## Competitive landscape

### **Cerebos Pacific remains leading player**

Herbal/traditional products is a fragmented category, with only one player, Cerebos Pacific, commanding a double-digit value share in 2017. The company's leading position can be attributed to its popular product Brand's, with its Essence of Chicken as the signature product. This is highly demanded among students and working adults due to its positioning to enhance cognitive performance and boost mental alertness. Furthermore, consumers are now able to purchase individual bottles of Essence of Chicken, which comes in both warm and chilled bottles, at selected convenience stores. This is set to encourage consumers to make more spontaneous purchases and allows the company to further boost sales.

### **New product development to spur growth**

In response to the growing demand for herbal/traditional products, manufacturers were also active in terms of new product development in 2017. For instance, Ricola Asia Pacific released Ricola Natural Relief that comes in three different flavours - Extra Menthol, Cherry and Honey Lemon. The range is positioned to soothe coughs, irritated throats and colds. With a wider product variety, the

company witnessed positive sales growth in 2017, maintaining its second position in herbal/traditional products.

## Category data

**Table 1 Sales of Herbal/Traditional Products by Category: Value 2012-2017**

SGD million	2012	2013	2014	2015	2016	2017
Herbal/Traditional Topical Analgesics	14.1	14.8	15.6	16.5	17.3	18.1
Herbal/Traditional Sleep Aids	0.9	1.0	1.0	1.0	1.1	1.1
Herbal/Traditional Cough, Cold and Allergy (Hay Fever) Remedies	54.0	55.4	57.0	58.9	60.8	62.6
Herbal/Traditional Digestive Remedies	3.6	3.6	3.7	3.8	3.9	4.0
Herbal/Traditional Dermatologicals	-	-	-	-	-	-
Herbal/Traditional Paediatric Dietary Supplements	-	-	-	-	-	-
Herbal/Traditional Dietary Supplements	142.9	143.3	147.6	152.4	156.9	161.6
Herbal/Traditional Tonics	52.6	55.0	57.2	59.7	61.8	63.6
Herbal/Traditional Products	268.1	273.1	282.0	292.4	301.7	311.0

Note: 2017 data is provisional and based on part-year estimates.

**Table 2 Sales of Herbal/Traditional Products by Category: % Value Growth 2012-2017**

% current value growth	2016/17	2012-17 CAGR	2012/17 Total
Herbal/Traditional Topical Analgesics	4.5	5.1	28.4
Herbal/Traditional Sleep Aids	3.7	3.8	20.3
Herbal/Traditional Cough, Cold and Allergy (Hay Fever) Remedies	3.0	3.0	15.9
Herbal/Traditional Digestive Remedies	2.4	2.4	12.3
Herbal/Traditional Dermatologicals	-	-	-
Herbal/Traditional Paediatric Dietary Supplements	-	-	-
Herbal/Traditional Dietary Supplements	3.0	2.5	13.1
Herbal/Traditional Tonics	3.0	3.9	20.8
Herbal/Traditional Products	3.1	3.0	16.0

Note: 2017 data is provisional and based on part-year estimates.

**Table 3 NBO Company Shares of Herbal/Traditional Products: % Value 2013-2017**

% retail value rsp	2013	2014	2015	2016	2017
Cerebos Pacific Ltd	12.0	12.4	12.8	13.5	13.9
Ricola Asia Pacific Pte Ltd	5.3	5.4	5.4	5.3	5.2
Lofthouse of Fleetwood Ltd	4.8	4.9	4.9	4.8	4.7
Haw Par Healthcare Ltd	3.7	3.9	4.1	4.2	4.4
Eu Yan Sang (S) Pte Ltd	4.0	4.2	4.3	4.4	4.4
Kordel's Ltd	3.2	3.2	3.2	3.1	3.1
Nu Skin Enterprises Singapore Pte Ltd	2.8	2.8	2.8	2.8	2.8
General Nutrition Centers Inc	2.7	2.7	2.8	2.8	2.7
Nin Jiom Medicine Mfy (S) Pte Ltd	2.1	2.2	2.2	2.1	2.1
Amway (S) Pte Ltd	1.0	0.9	0.9	0.9	0.9
Procter & Gamble (S) Pte Ltd	0.8	0.8	0.8	0.8	0.8

% retail value rsp	2013	2014	2015	2016	2017
Leung Kai Fook Medical Co Pte Ltd	0.6	0.7	0.7	0.7	0.7
Elken (S) Pte Ltd	0.9	0.7	0.7	0.7	0.7
Korea Ginseng Corp	1.2	1.0	0.8	0.7	0.6
VitaHealth Asia Pacific (S) Pte Ltd	0.7	0.7	0.7	0.6	0.6
Wyeth Pharmaceuticals (Singapore) Pte Ltd	0.7	0.6	0.6	0.6	0.6
Luen Fook Medicine Co Pte Ltd	0.5	0.5	0.5	0.5	0.5
Li Chung Shing Tong (Holdings) Ltd	0.5	0.5	0.5	0.5	0.5
21st Century Healthcare Pte Ltd	0.4	0.4	0.4	0.4	0.4
Bayer (South East Asia) Pte Ltd	0.4	0.4	0.4	0.4	0.4
Ocean Healthcare (S) Pte Ltd	0.2	0.4	0.4	0.4	0.4
Herbal Revival Sdn Bhd	0.2	0.2	0.3	0.3	0.3
Blackmores (S) Pte Ltd	0.2	0.2	0.2	0.2	0.3
Creative Network International (S) Pte Ltd	0.4	0.3	0.3	0.2	0.2
Herbalife International Singapore Pte Ltd	0.3	0.3	0.2	0.2	0.2
Poon Goor Soe Ltd	0.2	0.2	0.2	0.2	0.2
USANA Health Sciences Singapore Pte Ltd	0.2	0.2	0.2	0.2	0.2
Hacks Singapore Pte Ltd	0.2	0.2	0.2	0.2	0.1
Huamao Agencies Sdn Bhd	0.1	0.1	0.1	0.1	0.1
Best World International Ltd	0.1	0.1	0.1	0.1	0.1
Fancl Asia (Pte) Ltd	0.1	-	-	-	-
Other Private Label	0.1	0.0	0.0	0.0	0.0
Others	49.3	48.9	48.6	48.0	47.6
Total	100.0	100.0	100.0	100.0	100.0

**Table 4 LBN Brand Shares of Herbal/Traditional Products: % Value 2014-2017**

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Brand's (Suntory Holdings Ltd)	Cerebos Pacific Ltd	8.4	8.7	9.3	9.7
Ricola (Ricola AG)	Ricola Asia Pacific Pte Ltd	5.4	5.4	5.3	5.2
Fisherman's Friend	Lofthouse of Fleetwood Ltd	4.9	4.9	4.8	4.7
Eu Yan Sang (Eu Yan Sang International Ltd)	Eu Yan Sang (S) Pte Ltd	4.2	4.3	4.4	4.4
Tiger Balm (Haw Par Corp Ltd)	Haw Par Healthcare Ltd	3.5	3.6	3.8	3.9
Kordel's (Bionor Pharma ASA)	Kordel's Ltd	3.2	3.2	3.1	3.1
Pharmanex (Nu Skin Enterprises Inc)	Nu Skin Enterprises Singapore Pte Ltd	2.8	2.8	2.8	2.8
GNC	General Nutrition Centers Inc	2.7	2.8	2.8	2.7
Nin Jiom Pei Pa Koa (Nin Jiom Medicine Mfy (HK) Ltd)	Nin Jiom Medicine Mfy (S) Pte Ltd	1.3	1.3	1.3	1.4
Nutriline (Amway Corp)	Amway (S) Pte Ltd	0.9	0.9	0.9	0.9
Vicks (Procter & Gamble Co, The)	Procter & Gamble (S) Pte Ltd	0.8	0.8	0.8	0.8
Nin Jiom (Nin Jiom Medicine Mfy (HK) Ltd)	Nin Jiom Medicine Mfy (S) Pte Ltd	0.8	0.8	0.8	0.8
Axe Brand (Leung Kai Fook Co Ltd)	Leung Kai Fook Medical Co Pte Ltd	0.7	0.7	0.7	0.7
Elken (Elken Sdn Bhd)	Elken (S) Pte Ltd	0.7	0.7	0.7	0.7
Cheong-Kwan-Jang (KT&G Corp)	Korea Ginseng Corp	1.0	0.8	0.7	0.6
VitaHealth (Vita Life Sciences Ltd)	VitaHealth Asia Pacific (S) Pte Ltd	0.7	0.7	0.6	0.6
Robitussin (Pfizer Inc)	Wyeth Pharmaceuticals (Singapore) Pte Ltd	0.6	0.6	0.6	0.6
African Sea Coconut	Luen Fook Medicine Co Pte Ltd	0.5	0.5	0.5	0.5
Kwan Loong Oil (Haw Par Corp Ltd)	Haw Par Healthcare Ltd	0.4	0.5	0.5	0.5
Po Chai	Li Chung Shing Tong (Holdings) Ltd	0.5	0.5	0.5	0.5

% retail value rsp	Company (NBO)	2014	2015	2016	2017
21st Century (21st Century Laboratories Inc)	21st Century Healthcare Pte Ltd	0.4	0.4	0.4	0.4
Nature's Way (Dr Willmar Schwabe GmbH & Co KG)	Bayer (South East Asia) Pte Ltd	0.4	0.4	0.4	0.4
Ocean Health (Ocean Healthcare Laboratories Inc)	Ocean Healthcare (S) Pte Ltd	0.4	0.4	0.4	0.4
Thomson	Herbal Revival Sdn Bhd	0.2	0.3	0.3	0.3
Blackmores (Blackmores Ltd)	Blackmores (S) Pte Ltd	0.2	0.2	0.2	0.3
Herbalife (Herbalife Ltd)	Herbalife International Singapore Pte Ltd	0.3	0.2	0.2	0.2
Poon Goor Soe Pi Pa Lo	Poon Goor Soe Ltd	0.2	0.2	0.2	0.2
CNI (Citra Nusa Insan Cemerlang PT)	Creative Network International (S) Pte Ltd	0.2	0.2	0.2	0.2
USANA (USANA Health Sciences Inc)	USANA Health Sciences Singapore Pte Ltd	0.2	0.2	0.2	0.2
Hacks (Mondelez International Inc)	Hacks Singapore Pte Ltd	0.2	0.2	0.2	0.1
Other Private Label (Private Label)	Other Private Label	0.0	0.0	0.0	0.0
Others	Others	53.1	52.8	52.4	52.0
Total	Total	100.0	100.0	100.0	100.0

**Table 5 Forecast Sales of Herbal/Traditional Products by Category: Value 2017-2022**

SGD million	2017	2018	2019	2020	2021	2022
Herbal/Traditional Topical Analgesics	18.1	18.7	19.4	20.1	20.9	21.6
Herbal/Traditional Sleep Aids	1.1	1.1	1.2	1.2	1.3	1.3
Herbal/Traditional Cough, Cold and Allergy (Hay Fever) Remedies	62.6	63.8	65.4	67.0	68.9	70.7
Herbal/Traditional Digestive Remedies	4.0	4.0	4.1	4.1	4.2	4.3
Herbal/Traditional Dermatologicals	-	-	-	-	-	-
Herbal/Traditional Paediatric Dietary Supplements	-	-	-	-	-	-
Herbal/Traditional Dietary Supplements	161.6	164.9	168.1	171.3	174.2	177.0
Herbal/Traditional Tonics	63.6	64.4	65.0	65.6	66.1	66.6
Herbal/Traditional Products	311.0	317.0	323.2	329.4	335.6	341.5

Note: 2017 data is provisional and based on part-year estimates.

**Table 6 Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2017-2022**

% constant value growth	2017/2018	2017-22 CAGR	2017/22 Total
Herbal/Traditional Topical Analgesics	3.5	3.6	19.5
Herbal/Traditional Sleep Aids	3.4	3.5	18.7
Herbal/Traditional Cough, Cold and Allergy (Hay Fever) Remedies	2.0	2.5	12.9
Herbal/Traditional Digestive Remedies	1.1	1.3	6.7
Herbal/Traditional Dermatologicals	-	-	-
Herbal/Traditional Paediatric Dietary Supplements	-	-	-
Herbal/Traditional Dietary Supplements	2.0	1.8	9.5
Herbal/Traditional Tonics	1.2	0.9	4.7
Herbal/Traditional Products	1.9	1.9	9.8

# Vitamins in Singapore

## Headlines

- Vitamins records current value growth of 6% in 2017, to reach SGD71 million
- An increasing number of Singaporeans consume vitamins to meet nutritional needs
- Multivitamins registers the most dynamic current value growth of 9%
- Bayer (South East Asia) Pte Ltd leads vitamins with a 28% value share in 2017
- Vitamins is set to record a value CAGR of 4% at constant 2017 prices over the forecast period, increasing to SGD87 million in 2022

## Prospects

### **Vitamins appeal to consumers with stressful lifestyles**

Vitamins recorded strong current value growth in 2017, owing to busy lifestyles in Singapore. Faced with hectic work schedules, many Singaporeans do not have time to stay physically active, and often indulge in meals that are unbalanced in terms of nutrition. This therefore, spurs them to purchase vitamins and dietary supplements to obtain the necessary nutrients. In particular, there is an expanding interest in multivitamins, which offers consumers the convenience of obtaining all of the essential nutrients in a tablet.

### **Multivitamins will continue to outperform single vitamins**

With the growing interest in multivitamins, there is an opportunity for manufacturers to expand or introduce new variants within this category. For example, Bayer released its Redoxon Triple Action with Vitamin C, D and Zinc in 2017. However, for this reason, it is likely to cannibalise sales of single vitamins, as an increasing number of consumers will question the need to purchase separate vitamins when multivitamins are more convenient and less costly. Thus, sales of multivitamins are expected to continue to register higher value growth than single vitamins at 2017 constant prices over the forecast period.

### **Vitamin C continues to perform well**

Despite facing increasing competition from multivitamins, the popularity of vitamin C is expected to show no sign of abating in Singapore over the forecast period. Consumers are aware of its benefit to improve the immune system, making it the go-to-product. It also enjoys much greater shelf space than other types of single vitamins, while offering a variety of flavours and formats that appeal to consumers. For instance, brands such as Redoxon and Scott's offer vitamin C in a gummy format that attracts consumers who want a more appetising and pleasant way to take vitamins.



## Competitive landscape

### **Bayer remains the clear leader of vitamins**

Bayer (South East Asia) Pte Ltd led the category in 2017. The company markets vitamins under several brands, including Redoxon, Berocca and One-A-Day, which are generally well-positioned in most drugstores and supermarkets. These brands benefit from an extensive product portfolio, offering different vitamins for adults and paediatric consumption. Among which, Redoxon remained Bayer's leading brand. In 2017, the brand expanded its product range with the launch of Redoxon Triple Action with Vitamin C, D and Zinc. It also released its vitamin C gummies in grape flavour which was well-received by both children and adults.

### **Swisse records strong value sales growth**

Launched in 2015, the share of the brand Swisse grew steadily over the review period, due to its assortment of vitamins addressing specific consumer segments. For instance, products are positioned based on gender such as Swisse Men's Ultivite Multivitamin, while others are segmented by age such as Swisse Women's Ultivite 50+. The company has also heavily advertised and promoted the products through television and in-store, which successfully increased consumer awareness. Moreover, it has benefited from the appointment of local celebrity Rebecca Lim as ambassador as she endorsed the products on her Instagram account, which has more than 200,000 followers.

### **Highly competitive landscape in vitamins**

The competitive landscape in vitamins remained highly fragmented, with numerous brand owners with limited value shares. As a result, less-established brands are inclined to offer lower prices to compete against more prominent manufacturers. Similarly, while the share of private label in vitamins remained low, they are also aggressive in terms of promotions in a bid to increase consumer interest. The leading drugstore chain Guardian, for instance, provided more than 50% off its vitamins. While price discounts are appealing for consumers due to uncertain economic conditions, consumers are also paying increasing attention to the product quality. Hence, with competition expected to intensify over the forecast period, manufacturers will have to increase their advertising to translate consumers' belief in their efficacy.

## Category data

### **Summary 1 Multivitamins: Brand Ranking by Positioning 2017**

Positioning	Brand ranking	Brand	GBO
Teenagers	1	Centrum	Pfizer Inc
	2	One-A-Day	Bayer AG
	3	Blackmores	Blackmores Ltd
Women	1	Centrum	Pfizer Inc
	2	Nutrilite	Amway Corp
	3	Kordel's	Bionor Pharma ASA
Men	1	Centrum	Pfizer Inc
	2	One-A-Day	Bayer AG
	3	Ocean Health	Ocean Healthcare Laboratories Inc
Elderly	1	Centrum	Pfizer Inc
	2	21st Century	21st Century Laboratories Inc
	3	Kordel's	Bionor Pharma ASA
Pregnancy	1	Blackmores	Blackmores Ltd
	2	21st Century	21st Century Laboratories Inc
	3	GNC	General Nutrition Centers Inc
Other Multivitamins Positioning	1	Centrum	Pfizer Inc
	2	Berocca	Bayer AG
	3	Pharmanex	Nu Skin Enterprises Inc

**Table 1 Sales of Vitamins by Category: Value 2012-2017**

SGD million	2012	2013	2014	2015	2016	2017
Multivitamins	20.3	21.7	23.1	25.7	28.0	30.6
Single Vitamins	33.6	34.9	36.3	37.7	39.1	40.4
- Vitamin A	1.5	1.5	1.5	1.5	1.5	1.5
- Vitamin B	4.8	4.8	4.9	4.9	4.9	5.0
- Vitamin C	18.6	19.7	20.8	22.0	23.1	24.2
- Vitamin D	-	-	-	-	-	-
- Vitamin E	8.6	8.8	9.0	9.3	9.5	9.7
- Other Single Vitamins	-	-	-	-	-	-
Vitamins	53.9	56.6	59.4	63.4	67.1	71.0

Note: 2017 data is provisional and based on part-year estimates.

**Table 2 Sales of Vitamins by Category: % Value Growth 2012-2017**

% current value growth	2016/17	2012-17 CAGR	2012/17 Total
Multivitamins	9.2	8.5	50.4
Single Vitamins	3.4	3.8	20.3
- Vitamin A	-1.0	-0.2	-1.2
- Vitamin B	1.2	0.8	4.0
- Vitamin C	4.8	5.4	29.9
- Vitamin D	-	-	-
- Vitamin E	2.0	2.4	12.4
- Other Single Vitamins	-	-	-
Vitamins	5.8	5.7	31.7

Note: 2017 data is provisional and based on part-year estimates.

**Table 3 Sales of Multivitamins by Positioning: % Value 2012-2017**

% retail value rsp	2012	2013	2014	2015	2016	2017
Elderly	17.5	17.8	18.2	18.5	18.6	18.7
Men	16.4	16.5	16.5	16.4	16.3	16.4
Pregnancy	2.1	2.2	2.2	2.1	2.1	2.0
Teenagers	7.9	8.1	8.2	8.3	8.4	8.4
Women	29.0	29.3	29.3	29.4	29.5	29.6
Other Multivitamins Positioning	27.1	26.1	25.6	25.3	25.1	24.9
Total	100.0	100.0	100.0	100.0	100.0	100.0

Note: 2017 data is provisional and based on part-year estimates.

**Table 4 NBO Company Shares of Vitamins: % Value 2013-2017**

% retail value rsp	2013	2014	2015	2016	2017
Bayer (South East Asia) Pte Ltd	26.9	27.6	27.4	26.9	27.6
Wyeth Pharmaceuticals (Singapore) Pte Ltd	12.2	13.6	13.9	14.4	14.8
General Nutrition Centers Inc	6.8	7.3	7.2	7.2	7.1
Blackmores (S) Pte Ltd	6.1	6.1	6.2	6.3	6.3
Kordel's Ltd	6.4	6.3	6.2	6.2	6.1
21st Century Healthcare Pte Ltd	4.5	4.5	4.4	4.3	4.2
VitaHealth Asia Pacific (S) Pte Ltd	5.2	4.7	4.4	4.0	3.8
USANA Health Sciences Singapore Pte Ltd	3.7	3.4	3.3	3.2	3.2
Ocean Healthcare (S) Pte Ltd	2.2	2.4	2.8	3.0	3.0
Procter & Gamble (S) Pte Ltd	-	-	0.9	1.6	2.5
Amway (S) Pte Ltd	2.8	2.6	2.6	2.5	2.5
Dairy Farm International Holdings Ltd	1.9	1.6	1.6	1.5	1.4
Nu Skin Enterprises Singapore Pte Ltd	1.4	1.4	1.4	1.4	1.4
Shaklee Products (M) Sdn Bhd	1.3	1.2	1.2	1.2	1.1

% retail value rsp	2013	2014	2015	2016	2017
Herbalife International Singapore Pte Ltd	1.0	0.9	1.0	1.0	1.0
Elken (S) Pte Ltd	1.2	1.1	1.0	1.0	0.9
Sanofi-Aventis Singapore Pte Ltd	-	-	-	-	0.7
Best World International Ltd	0.5	0.3	0.3	0.2	0.2
Creative Network International (S) Pte Ltd	0.1	0.1	0.1	0.1	0.1
Boehringer Ingelheim Singapore Pte Ltd	1.1	0.8	0.8	0.7	-
Fancl Asia (Pte) Ltd	0.3	-	-	-	-
Cerebos Pacific Ltd	-	-	-	-	-
Other Private Label	3.0	2.7	2.6	2.5	2.4
Others	11.5	11.1	10.8	11.0	9.7
Total	100.0	100.0	100.0	100.0	100.0

**Table 5 LBN Brand Shares of Vitamins: % Value 2014-2017**

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Redoxon (Bayer AG)	Bayer (South East Asia) Pte Ltd	18.9	18.6	18.0	18.8
Centrum (Pfizer Inc)	Wyeth Pharmaceuticals (Singapore) Pte Ltd	13.6	13.9	14.4	14.8
GNC	General Nutrition Centers Inc	7.3	7.2	7.2	7.1
Blackmores (Blackmores Ltd)	Blackmores (S) Pte Ltd	6.1	6.2	6.3	6.3
Berocca (Bayer AG)	Bayer (South East Asia) Pte Ltd	5.8	6.1	6.2	6.2
Kordel's (Bionor Pharma ASA)	Kordel's Ltd	6.3	6.2	6.2	6.1
21st Century (21st Century Laboratories Inc)	21st Century Healthcare Pte Ltd	4.5	4.4	4.3	4.2
VitaHealth (Vita Life Sciences Ltd)	VitaHealth Asia Pacific (S) Pte Ltd	4.7	4.4	4.0	3.8
USANA (USANA Health Sciences Inc)	USANA Health Sciences Singapore Pte Ltd	3.4	3.3	3.2	3.2
Ocean Health (Ocean Healthcare Laboratories Inc)	Ocean Healthcare (S) Pte Ltd	2.4	2.8	3.0	3.0
Swisse (Biostime Inc)	Procter & Gamble (S) Pte Ltd	-	0.9	1.6	2.5
Nutrilite (Amway Corp)	Amway (S) Pte Ltd	2.6	2.6	2.5	2.5
Guardian (Private Label)	Dairy Farm International Holdings Ltd	1.6	1.6	1.5	1.4
Pharmanex (Nu Skin Enterprises Inc)	Nu Skin Enterprises Singapore Pte Ltd	1.4	1.4	1.4	1.4
One-A-Day (Bayer AG)	Bayer (South East Asia) Pte Ltd	1.2	1.2	1.2	1.1
Shaklee (Shaklee Corp)	Shaklee Products (M) Sdn Bhd	1.2	1.2	1.2	1.1
Nature's Way (Dr Willmar Schwabe GmbH & Co KG)	Bayer (South East Asia) Pte Ltd	1.1	1.1	1.1	1.0
Herbalife (Herbalife Ltd)	Herbalife International Singapore Pte Ltd	0.9	1.0	1.0	1.0
Elken (Elken Sdn Bhd)	Elken (S) Pte Ltd	1.1	1.0	1.0	0.9

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Pharmaton (Sanofi)	Sanofi-Aventis Singapore Pte Ltd	-	-	-	0.7
Supradyn (Bayer AG)	Bayer (South East Asia) Pte Ltd	0.5	0.5	0.5	0.4
Avance	Best World International Ltd	0.3	0.3	0.2	0.2
CNI (Citra Nusa Insan Cemerlang PT)	Creative Network International (S) Pte Ltd	0.1	0.1	0.1	0.1
Pharmaton (Boehringer Ingelheim GmbH)	Boehringer Ingelheim Singapore Pte Ltd	0.8	0.8	0.7	-
Brand's (Suntory Holdings Ltd)	Cerebos Pacific Ltd	-	-	-	-
Fancl (Fancl Corp)	Fancl Asia (Pte) Ltd	-	-	-	-
Kordel's (Vitaco Health Ltd)	Kordel's Ltd	-	-	-	-
Centrum (Wyeth)	Wyeth Pharmaceuticals (Singapore) Pte Ltd	-	-	-	-
Other Private Label (Private Label)	Other Private Label	2.7	2.6	2.5	2.4
Others	Others	11.1	10.8	11.0	9.7
Total	Total	100.0	100.0	100.0	100.0

**Table 6 Forecast Sales of Vitamins by Category: Value 2017-2022**

SGD million	2017	2018	2019	2020	2021	2022
Multivitamins	30.6	33.0	35.5	38.1	40.6	43.1
Single Vitamins	40.4	41.1	41.8	42.4	43.1	43.7
- Vitamin A	1.5	1.5	1.5	1.5	1.4	1.4
- Vitamin B	5.0	5.0	4.9	4.9	4.9	4.9
- Vitamin C	24.2	24.8	25.4	26.0	26.5	27.0
- Vitamin D	-	-	-	-	-	-
- Vitamin E	9.7	9.8	9.9	10.1	10.3	10.4
- Other Single Vitamins	-	-	-	-	-	-
Vitamins	71.0	74.1	77.3	80.5	83.7	86.8

Note: 2017 data is provisional and based on part-year estimates.

**Table 7 Forecast Sales of Vitamins by Category: % Value Growth 2017-2022**

% constant value growth	2017/2018	2017-22 CAGR	2017/22 Total
Multivitamins	8.0	7.1	40.9
Single Vitamins	1.7	1.6	8.1
- Vitamin A	-1.5	-1.3	-6.2
- Vitamin B	-0.6	-0.5	-2.4
- Vitamin C	2.6	2.2	11.5
- Vitamin D	-	-	-
- Vitamin E	1.2	1.4	7.3
- Other Single Vitamins	-	-	-
Vitamins	4.4	4.1	22.2



# Weight Management and Wellbeing in Singapore

## Headlines

- Weight management and wellbeing grows by 4% in current value terms, reaching sales of SGD74 million in 2017
- Category benefits as consumers place greater importance on their appearance
- Weight loss supplements posts the strongest current value growth of 5%
- Herbalife International Singapore remains the leading player with a 33% value share in 2017
- Weight management and wellbeing is predicted to record a value CAGR of 3% at constant 2017 prices, reaching SGD84 million in 2022

## Prospects

### Consumers shift to active lifestyles

Weight management and wellbeing continued to post strong positive growth in 2017, attributed to the high level of image-consciousness amongst Singaporeans, especially females. However, the category is expected to post weaker value growth over the forecast period. A survey conducted by Herbalife revealed that 42% of Singapore respondents are more likely to exercise to ensure healthy ageing. Therefore, weight management and wellbeing products such as meal replacement are not expected to grow in tandem with the ageing population, as Singaporeans prefer to lose weight through consistent exercise and a strict diet.

### Players need to review their marketing strategies

As consumers increasingly shift to permanent lifestyle changes, manufacturers will also need to alter their marketing strategies to retain consumers' interests in weight management and wellbeing. Herbalife International Singapore, for instance, is set to shift its product positioning from offering strict weight loss products to a holistic approach for wellbeing. The company also posts frequent workout tips, recipes and motivational quotes on its Facebook account, encouraging people to engage in active lifestyles.

### Demand for OTC obesity to plummet

Value sales of OTC obesity continued to decline in 2017, and are expected to fall further over the forecast period. The health and wellness trend will lead consumers to opt for more "natural" means of losing weight, rather than the consumption of OTC obesity on a long-term basis. Furthermore, the Health Science Authority (HSA) has reported two cases of liver problems suspected to be associated with the use of orlistat, which is an active ingredient found in Xenical. Demand for OTC obesity has therefore dampened as consumers continued to shun the product.

## Competitive landscape

### Herbalife International Singapore remains the leading player

Herbalife International Singapore, which operates a direct selling model, continued to lead weight management and wellbeing in 2017. This can be attributed to its wide range of weight loss supplements and meal replacement products. It also benefits from a strong social media presence, with more than four million followers on its local Facebook account. This gives a competitive advantage to the company to extend its marketing efforts, instead of relying on word-of-mouth to spur sales. In addition, Herbalife’s value share showed a marginal improvement in 2017, due to an expanding distribution network as an increasing number of Singaporeans searched for second jobs to earn extra income.

### Marketing is needed to promote consumers’ trust

Over the review period, there were several negative press reports about the possible links of weight management and wellbeing products with health problems. One example is the Li Da Dai Hua weight loss capsule, which was found to contain sibutramine, which potentially causes heart attacks and strokes. Consequently, consumers are becoming increasingly cautious about their purchases, and prefer to buy from trusted retailers and websites. Therefore, with growing concerns over health issues, it remains important for manufacturers to conduct marketing efforts, such as the use of success stories and consumer reviews, which helps to boost consumer confidence in product authenticity.

## Category data

**Table 1 Sales of Weight Management and Wellbeing by Category: Value 2012-2017**

SGD million	2012	2013	2014	2015	2016	2017
Meal Replacement	18.5	19.0	19.4	19.8	20.3	20.7
OTC Obesity	1.1	1.0	1.0	1.0	0.9	0.9
Slimming Teas	3.0	3.1	3.3	3.4	3.5	3.7
Supplement Nutrition Drinks	1.3	1.3	1.3	1.4	1.4	1.5
Weight Loss Supplements	35.9	37.3	39.6	42.2	44.5	46.9
Weight Management and Wellbeing	59.6	61.8	64.6	67.8	70.7	73.6

Note: 2017 data is provisional and based on part-year estimates.

**Table 2 Sales of Weight Management and Wellbeing by Category: % Value Growth 2012-2017**

% current value growth	2016/17	2012-17 CAGR	2012/17 Total
Meal Replacement	2.0	2.3	11.9
OTC Obesity	-4.0	-3.0	-14.2
Slimming Teas	4.2	4.3	23.7
Supplement Nutrition Drinks	4.0	3.2	16.8
Weight Loss Supplements	5.3	5.5	30.7
Weight Management and Wellbeing	4.1	4.3	23.4

Note: 2017 data is provisional and based on part-year estimates.

**Table 3 NBO Company Shares of Weight Management and Wellbeing: % Value 2013-2017**

% retail value rsp	2013	2014	2015	2016	2017
Herbalife International Singapore Pte Ltd	33.8	33.1	32.8	32.6	32.9
Byron & Co Pte Ltd	6.1	8.6	9.3	10.2	11.0
Avenza Pte Ltd	8.8	9.2	9.5	6.8	4.1
Crimsons Pharma Inc	4.0	4.0	4.0	4.0	4.1
Hi-Beau International Pte Ltd	4.9	3.7	3.7	3.8	3.9
21st Century Healthcare Pte Ltd	3.0	2.9	2.9	2.9	3.0
Nu Skin Enterprises Singapore Pte Ltd	2.5	2.5	2.4	2.5	2.5
USANA Health Sciences Singapore Pte Ltd	2.6	2.5	2.5	2.4	2.4
Reborne Pte Ltd	2.3	2.3	2.2	2.3	2.3
Cambridge Mfg Co Ltd	2.5	2.3	2.3	2.2	2.1
Abbott Laboratories (S) Pte Ltd	1.6	1.6	1.6	1.6	1.5
Roche Singapore Pte Ltd	1.7	1.6	1.4	1.3	1.2
Amway (S) Pte Ltd	1.3	1.2	1.2	1.1	1.1
Fancl Asia (Pte) Ltd	1.8	0.5	0.3	0.4	0.4
Heinz Singapore Pte Ltd	-	-	-	-	-
LifePharm Pte Ltd	-	-	-	-	-
Others	23.3	24.0	23.8	26.0	27.4
Total	100.0	100.0	100.0	100.0	100.0

**Table 4 LBN Brand Shares of Weight Management and Wellbeing: % Value 2014-2017**

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Herbalife (Herbalife Ltd)	Herbalife International Singapore Pte Ltd	33.1	32.8	32.6	32.9
Glow	Byron & Co Pte Ltd	8.6	9.3	10.2	11.0
SlimSpa	Crimsons Pharma Inc	4.0	4.0	4.0	4.1

% retail value rsp	Company (NBO)	2014	2015	2016	2017
Avalon	Hi-Beau International Pte Ltd	3.7	3.7	3.8	3.9
PhaseOut	Avenza Pte Ltd	7.3	7.8	5.7	3.5
21st Century (21st Century Laboratories Inc)	21st Century Healthcare Pte Ltd	2.9	2.9	2.9	3.0
USANA (USANA Health Sciences Inc)	USANA Health Sciences Singapore Pte Ltd	2.5	2.5	2.4	2.4
Xndo	Reborne Pte Ltd	2.3	2.2	2.3	2.3
Cambridge Diet, The	Cambridge Mfg Co Ltd	2.3	2.3	2.2	2.1
Pharmanex (Nu Skin Enterprises Inc)	Nu Skin Enterprises Singapore Pte Ltd	2.0	1.9	2.0	2.1
Ensure (Abbott Laboratories Inc)	Abbott Laboratories (S) Pte Ltd	1.6	1.6	1.6	1.5
Xenical (Roche Holding AG)	Roche Singapore Pte Ltd	1.6	1.4	1.3	1.2
BodyKey by Nutrilite (Amway Corp)	Amway (S) Pte Ltd	1.2	1.2	1.1	1.1
Reduze	Avenza Pte Ltd	1.8	1.7	1.1	0.6
TrimShake (Nu Skin Enterprises Inc)	Nu Skin Enterprises Singapore Pte Ltd	0.5	0.5	0.5	0.5
Fancl (Fancl Corp)	Fancl Asia (Pte) Ltd	0.5	0.3	0.4	0.4
Complan (Danone, Groupe)	Heinz Singapore Pte Ltd	-	-	-	-
Blue Genius (Pacific Image Internasional PT)	LifePharm Pte Ltd	-	-	-	-
Extrim (Pacific Image Internasional PT)	LifePharm Pte Ltd	-	-	-	-
Others	Others	24.0	23.8	26.0	27.4
Total	Total	100.0	100.0	100.0	100.0

**Table 5 Forecast Sales of Weight Management and Wellbeing by Category: Value 2017-2022**

SGD million	2017	2018	2019	2020	2021	2022
Meal Replacement	20.7	20.9	21.1	21.4	21.7	22.0
OTC Obesity	0.9	0.9	0.8	0.8	0.8	0.7
Slimming Teas	3.7	3.8	3.9	4.1	4.2	4.4
Supplement Nutrition Drinks	1.5	1.5	1.5	1.5	1.5	1.6
Weight Loss Supplements	46.9	48.8	50.4	51.9	53.4	54.7
Weight Management and Wellbeing	73.6	75.8	77.9	79.8	81.7	83.5

Note: 2017 data is provisional and based on part-year estimates.

**Table 6 Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2017-2022**

% constant value growth	2017/2018	2017-22 CAGR	2017/22 Total
Meal Replacement	1.1	1.3	6.7
OTC Obesity	-4.2	-4.7	-21.5
Slimming Teas	3.4	3.6	19.4
Supplement Nutrition Drinks	1.1	1.3	6.7
Weight Loss Supplements	4.0	3.1	16.7
Weight Management and Wellbeing	3.0	2.5	13.4

# Related Company Profiles

## Cerebos Pacific Ltd in Consumer Health (Singapore)

### Strategic direction

- In 2016, Cerebos Pacific continued to target the female population in Singapore through new innovations such as Brand’s InnerShine Berry Essence, Brand’s Sesamin with Schisandra Extract and Brand’s Essence of Chicken with Tangkwei.
- Cerebos Pacific is aiming to strengthen its position in dietary supplements, believing that, through good business practices and standards, a positive brand reputation can be established.
- Cerebos Pacific has a strong presence in vitamins and dietary supplements, with its flagship Brand’s range being a household name in Asia. The company is known for its Essence of Chicken, while also aggressively marketing its beauty nutritive brand Innershine, targeted at women.
- Headquartered in Singapore, Cerebos Pacific’s main markets are Thailand, Taiwan, Singapore, Malaysia, Hong Kong and China. In addition, the company also has a presence in Indonesia, the Philippines, Australia and New Zealand, while its dietary supplements business is strong in countries in Southeast Asia, Hong Kong and China and its packaged foods are more prominent in Australia and New Zealand.
- The company places great value on its corporate social responsibility activities. In 2016, it organised a charity e-sale whereby consumers could make a donation of SGD25, SGD50 or SGD100 to receive an assortment of Suntory and Brand’s products as a token of appreciation from the company. The proceeds will go to The Straits Times School Pocket Money Fund, which helps put children from low-income families through school.

### KEY FACTS

#### Summary 1 Cerebos Pacific Ltd: Key Facts

Full name of company:	Cerebos Pacific Ltd
www:	www.cerebos.com
Activities:	Manufacturer of dietary supplements, coffee and packaged food

## COMPETITIVE POSITIONING

- The company ranked second in consumer health overall in 2016 with a value share of 5%, up slightly from the previous year thanks to new product launches focused on meeting the changing needs of consumers.
- The company sells its products through both store-based and non-store channels. Its Brand's range can be purchased in major hypermarkets, supermarkets, convenience stores, drugstores and pharmacies. The company also has an online presence. Aside from its products being available through the online stores of leading grocery retailers, it also offers internet sales through its own website, which runs various exclusive promotions.
- The company offers a fairly wide range of vitamins and dietary supplements, many of which are tonics. Its Brand's Essence of Chicken is well-known to many Singaporeans, with the company seeking to tap into this familiarity with the launch of new variants such as Brand's Essence of Chicken with American Ginseng and Brand's Essence of Chicken with Tangkwei.
- The company is a leader in terms of innovation in tonics, particularly with regard to essence of chicken tonics.

### *Summary 2 Cerebos Pacific Ltd: Competitive Position 2016*

Product type	Value share	Rank
Consumer health	5.1%	2
OTC	-	-
Sports nutrition	-	-
Vitamins and dietary supplements	8.9%	2
Weight management and wellbeing	-	-
Herbal/traditional products	13.6%	1
Allergy care	-	-
Paediatric consumer health	12.1%	2



# Eu Yan Sang (S) Pte Ltd in Consumer Health (Singapore)

## STRATEGIC DIRECTION

- Moving forward, Eu Yan Sang will seek to make its products available to consumers through more channels. It will also focus on introducing good quality new products which are convenient to take.
- Eu Yan Sang aims to help consumers embrace a healthy lifestyle, seeking natural solutions to curing pain and preventing illness. The company will continue to invest in its herb processing facility in Sichuan, China, and work on its new manufacturing facility in Hong Kong.
- Eu Yan Sang started out as a small shop selling traditional Chinese herbal remedies and has since evolved into a global healthcare company manufacturing and retailing traditional Chinese medicines and herbs. The company was listed on the Singapore Stock Exchange in 2000 and has operations in Hong Kong, Malaysia, Singapore, Macau and China.
- In addition to Chinese herbs and proprietary medicines, Eu Yan Sang retails health foods, dietary supplements, beverages, packaged tonic soups and personal care items. Eu Yan Sang’s consumer health portfolio is concentrated in vitamins and dietary supplements. Its best-selling products are Bottled Bird’s Nest, Bo Ying Compound, Bak Foong Pills, Lingzhi Cracked Spore Capsules and Essence of Chicken, offered under various brands.
- Besides retail outlets, the company also operates traditional Chinese medicine clinics and integrated medical clinics, while also having five subbrand outlets in Malaysia (four Honey Mart outlets and one Yen outlet). The Honey Mart and Yen outlets specialise in honey and bird’s nest products, respectively.
- Eu Yan Sang enjoys regional coverage, having retail outlets in Hong Kong, Malaysia, Singapore, Macau, Australia and China. Its products are also available in hypermarkets, supermarkets, chemists/pharmacies, parapharmacies/drugstores and convenience stores.

## KEY FACTS

### Summary 1 Eu Yan Sang (S) Pte Ltd: Key Facts

Full name of company:	Eu Yan Sang (S) Pte Ltd
www:	www.euyansang.com
Activities:	Retailer and manufacturer of herbal/traditional vitamins and dietary supplements, beauty and personal care products and packaged foods

### Summary 2 Eu Yan Sang (S) Pte Ltd: Operational Indicators

	2013	2014	2015
Net sales	SGD326.9 million	SGD366.3 million	SGD350.4 million
Net profit	SGD18.1 million	SGD15.1 million	SGD4.6 million

### COMPETITIVE POSITIONING

- Eu Yan Sang ranked 15th in consumer health in 2016 with a value share of 2%. The company's share remained unchanged over the review period as it faced competition from other leading players which also launched new herbal/traditional products, especially those selling through leading pharmacies and drugstores, of which there are more outlets across Singapore compared to the number of stores run by Eu Yan Sang.
- The company sells its products through both store-based and non-store channels. In terms of physical stores, the company has 44 retail outlets in Singapore. It also sells selected products through third party stores. For example, the Eu Yan Sang Herbal Plaster is also sold in Watson's drugstores. In the non-store channel, the company sells its products through the Eu Yan Sang online store, offering free delivery in Singapore for orders over SGD120.
- The company has a mid to high priced positioning. It offers a wide range of herbal/traditional products to meet the needs of different age groups or those facing different health issues. Its products come in several formats, such as powders, tablets, capsules and drinks. The company also offers gift sets and hampers for various occasions, such as for new mothers and their babies. It also offers hampers containing halal products.
- Eu Yan Sang is a leader in terms of transforming traditional Chinese herbs into convenient formats such as tablets so as to provide greater convenience to busy consumers who do not have the time to prepare drinks or soups at home using such ingredients.

### Summary 3 Eu Yan Sang (S) Pte Ltd: Competitive Position 2016

Product type	Value share	Rank
Consumer health	1.5%	15
OTC	-	-
Sports nutrition	-	-
Vitamins and dietary supplements	2.7%	9
Weight management and wellbeing	-	-
Herbal/traditional products	4.5%	4
Allergy care	-	-
Paediatric consumer health	-	-

# General Nutrition Centers Inc in Consumer Health (Singapore)

## Strategic direction

- In 2016, General Nutrition Centers continued to introduce new products promoting health and wellbeing. In particular, the company focused on offering solutions to support younger skin, brain health and digestive health as these are popular areas of concern for many consumers.
- General Nutrition Centers is seeking to become the largest vitamins and dietary supplements retailer in Asia Pacific. It is constantly expanding its product portfolio to cater for the changing needs of consumers. The company has outlets in popular malls while also operating an online store to better meet the needs of busy consumers.
- General Nutrition Centers is part of GNC Holdings Inc, which is headquartered in the US and listed on the New York Stock Exchange. ONI Global Pte Ltd is the sole franchisee for the company in Singapore, Malaysia, Taiwan and Australia. While most of the company’s retail stores are located in the US, it also has a presence in more than 50 countries.
- GNC is a retailer specialising in health and wellness products such as vitamins and dietary supplements and sports nutrition, with the company’s creed, Live Well, encompassing the variety of products it distributes and manufactures. Besides being known as a retailer in Singapore which offers a plethora of health and wellness brands, the company is also known for its own range of products, such as Pro Performance AMP and Beyond Raw. GNC goods are positioned as value-added nutritional products.

## KEY FACTS

### Summary 1 General Nutrition Centers Inc: Key Facts

Full name of company:	General Nutrition Centers Inc
www:	www.gnc.com.sg
Activities:	Retailer and manufacturer of vitamins and dietary supplements and sports nutrition

## COMPETITIVE POSITIONING

- General Nutrition Centers led consumer health in Singapore in 2016 with a value share of 7%. Consumer awareness of the GNC brand is strong due to the widespread presence of the company's retail outlets in major malls. However, the company's value share stagnated in 2016 due to competition from other international brands sold through leading pharmacies and drugstores.
- The company sells its products through both store-based and non-store channels. As of October 2016, General Nutrition Centers had 59 retail outlets across Singapore. The company also has a presence online through its own GNC Singapore website as well as via third party websites such as Lazada Singapore so as to meet the needs of busy and tech-savvy consumers.
- General Nutrition Centers offers a wide range of vitamins and dietary supplements, as well as sports nutrition, at mid-range prices to target mass consumers. It also runs a loyalty programme to encourage repeat purchases.
- The company is generally not considered a leader in terms of innovation in sports nutrition or vitamins and dietary supplements as its products are already well-established in the marketplace.

### *Summary 2 General Nutrition Centers Inc: Competitive Position 2016*

Product type	Value share	Rank
Consumer health	6.9%	1
OTC	0.1%	53
Sports nutrition	11.7%	4
Vitamins and dietary supplements	9.9%	1
Weight management and wellbeing	-	-
Herbal/traditional products	2.7%	8
Allergy care	-	-
Paediatric consumer health	3.6%	4

# Haw Par Healthcare Ltd in Consumer Health (Singapore)

## Strategic direction

- Haw Par Healthcare aims to continue to grow through sports sponsorship in Singapore, positioning its Tiger Balm as the topical analgesic of choice for athletes and the fitness-conscious. The company expects to face stricter regulatory controls with regard to topical analgesics and will take all possible measures to maintain its share of sales.
- Haw Par Healthcare plans to expand its core healthcare business through product extensions under its established brands. In addition, it also aims to increase its value share through marketing and promotional campaigns to further raise awareness and build a stronger brand positioning among consumers.
- Haw Par Healthcare is a wholly-owned subsidiary of Haw Par Corp Ltd, which was listed on the Singapore Stock Exchange in 1969. Haw Par Healthcare was founded in 1988 and offers ointments, plasters, lotions, sprays and creams under its topical analgesics/anaesthetic portfolio. The company’s two main brands are Tiger Balm and Kwan Loong Oil.
- Haw Par Healthcare operates mainly in topical analgesics/anaesthetic. The company’s Tiger Balm brand is a household name in Asia and is now available in ointment, plaster, rub and refresher formats. Tiger Balm is a distinctive and iconic brand in Singapore and has been recognised as one of the top national designs by the Designers Association of Singapore.
- Haw Par Healthcare has distribution activities in Singapore, Malaysia, Thailand, the Philippines, Indonesia, Taiwan, China and India. The company also exports its products globally, including to the US and Germany.

## KEY FACTS

### Summary 1 Haw Par Healthcare Ltd: Key Facts

Full name of company:	Haw Par Healthcare Ltd
www:	www.hawpar.com
Activities:	Manufacturer of topical analgesics/anaesthetic

### Summary 2 Haw Par Healthcare Ltd: Operational Indicators

Year end December	2013	2014	2015
Net sales	SGD103.5 million	SGD122.2 million	SGD152.6 million
Net profit	SGD25.9 million	SGD33.9 million	SGD48.1 million
Number of employees	437	469	546

## COMPETITIVE POSITIONING

- Haw Par Healthcare ranked 16th in consumer healthcare in Singapore in 2016 with a value share of 2%. However, it was the leading player in topical analgesics/anaesthetic thanks to the popularity of its Tiger Balm brand among Singaporeans of all ages. The company's value share in herbal/traditional topical analgesics increased over the review period as the company engaged in more sponsorship and promotional activities to attract younger consumers.
- The company sells its products mainly through store-based retailers, which include the leading hypermarkets, supermarkets, convenience stores, drugstores and pharmacies. Some of these retail stores also offer internet sales.
- Haw Par Healthcare offers a wide range of herbal/traditional topical analgesics targeting different parts of the body, such as the back and shoulders, and in various formats, including ointments, patches and lotions. Its products have a mid-priced positioning and target mass consumers.
- The company is a leader in terms of innovation in herbal/traditional topical analgesics, having been responsible for the launch of new developments such as thinner and milder scented patches to meet the demands of modern consumers.

### *Summary 3 Haw Par Healthcare Ltd: Competitive Position 2016*

Product type	Value share	Rank
Consumer health	1.5%	16
OTC	6.1%	5
Sports nutrition	-	-
Vitamins and dietary supplements	-	-
Weight management and wellbeing	-	-
Herbal/traditional products	4.3%	5
Allergy care	-	-
Paediatric consumer health	-	-

# Nu Skin Enterprises Singapore Pte Ltd in Consumer Health (Singapore)

## Strategic direction

- Nu Skin will continue to focus on developing products which are beneficial to consumers’ skin and overall health.
- Nu Skin Enterprises Singapore aims to inspire empowerment and improve lives globally through business opportunities, good products and an elevating culture. Ultimately, the company is striving towards increasing its sales and becoming the leading direct seller in the world.
- Nu Skin focuses mainly on dermatology and cosmetic science to improve inner and outer wellness, promoting three core brands across different industries, namely Nu Skin, Pharmanex and Big Planet. Nu Skin is a line of over 100 premium skin care and other personal care products such as ageLOC, while Big Planet offers a range of innovative technological products such as MaxVault, which enables the easy preservation and sharing of photos and home movies. Pharmanex offers dietary supplements created by a team of over 100 in-house scientists.
- Nu Skin is present in 48 international markets across the Americas, Asia Pacific and Europe, although its products are generally better known in Asia. In 2014, the company celebrated its 30th anniversary.

## KEY FACTS

### Summary 1 Nu Skin Enterprises Singapore Pte Ltd: Key Facts

Full name of company:	Nu Skin Enterprises Singapore Pte Ltd
www:	<a href="http://www.nuskin.com/content/nuskin/en_SG/home.html">www.nuskin.com/content/nuskin/en_SG/home.html</a>
Activities:	Direct seller of consumer health and beauty and personal care products

## COMPETITIVE POSITIONING

- Nu Skin Enterprises Singapore ranked fourth in consumer health in Singapore in 2016 with a value share of 4%. The company’s share increased over the review period as it is present in fast-growing areas of the market with a focus on anti-ageing, thus attracting women with the purchasing power and desire to invest in their appearance.
- The company is a direct seller whose products are mostly sold through its agents. Consumers are generally exposed to Nu Skin products through word of mouth. The company also allows consumers to purchase online through its website, where they are also able to earn and redeem points.
- The company offers a wide range of products in vitamins and dietary supplements, such as fish oils, glucosamine, probiotics, tonics and vitamins to meet the needs of different consumers. It also offers weight management products, including meal replacement and weight loss supplements. The company positions itself at the mid to high end of the market, highlighting its products’ quality and efficacy.

- Nu Skin is a leader in terms of research and development, constantly launching new innovations to meet consumers' changing needs and demands.

**Summary 2 Nu Skin Enterprises Singapore Pte Ltd: Competitive Position 2016**

Product type	Value share	Rank
Consumer health	4.0%	4
OTC	-	-
Sports nutrition	-	-
Vitamins and dietary supplements	6.6%	3
Weight management and wellbeing	2.4%	8
Herbal/traditional products	2.8%	7
Allergy care	-	-
Paediatric consumer health	3.5%	5