



Freedonia Focus Reports
US Collection

Nutritional Supplements: United States

October 2016



Highlights

Market Overview

Market Forecast | Mass-Market Nutritional Supplement Sales
Driving Trends for Nutritional Supplements | Nutritional Supplement Marketers
Retail Nutritional Supplement Sales | Key Drivers of Sales | Companies Cited

Resources

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ABOUT THIS REPORT

Scope & Method

This report forecasts annual US nutritional supplement sales in US dollars at the retail level for 2016-2020. To illustrate historical trends, total sales are provided in an annual series from 2011 to 2015. Private-label and name-brand supplement retail sales tracked by Information Resources (IRI) Multi-Outlet (MULO) data are provided for 2015-2016 and segmented by type as follows:

- mineral supplements
- multivitamins
- one- and two-letter vitamins
- liquid vitamins and minerals.

Excluded from the scope of this report are sports supplements, weight-loss supplements, and caffeine-based “fast” energy shots; supplements sold as fresh cooking ingredients (eg, fresh garlic); supplements sold at the institutional or practitioner/professional healthcare level; and those sold via multi-level marketing.

This report quantifies trends in various measures of growth. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Other various topics, such as the market share estimates by supplier for each IRI MULO-tracked type segment, are provided. A full outline of report items by page is available in the [Table of Contents](#).

Sources

Nutritional Supplements: United States (FF40066) is based on [Nutritional Supplements in the US, 7th Edition](#), a comprehensive industry report published by Packaged Facts in October 2016.

This report uses a number of sources of primary data to define the nutritional supplement market in the US. The first source of primary data used in this report is IRI InfoScan Reviews for the 52 weeks ending July 10, 2016. The second major source of primary data is the Winter 2016 Simmons National Consumer Study (NCS), which was fielded between February 2015 and March 2016. The report also includes data from

previous years of the Simmons NCS, as well as trends derived from multiple other years of the survey. The third major source of primary data is Packaged Facts own National Consumer Survey, conducted in July and August of 2016. Our primary research also includes interviews with nutritional supplement experts, on-site examination of retail and service provider venues, and internet canvassing, including websites and blogs.

The report is also based upon data collected from field surveys of supplement retailers in various channels as well as a wide range of industry sources, including company websites; trade publications; business newspapers and magazines; consumer blogs; annual reports, 10Ks, and other releases from public companies; and information culled from Packaged Facts' extensive nutritional supplement market research database and report collection.

Estimates of market size and marketer and brand rankings are primarily based on IRI's InfoScan MULO data and reported revenues of nutritional supplement manufacturers and retailers.

Specific sources and additional resources are listed in the [Resources](#) section of this publication for reference and to facilitate further research.

Industry Codes

The topic of this report is related to the following industry codes:

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
325411	Medicinal and Botanical Mfg	2833	Medicinal Chemicals and Botanical Products
325412	Pharmaceutical Preparation Mfg	2834	Pharmaceutical Preparations

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RESOURCES

Packaged Facts

www.packagedfacts.com

Nutritional Supplements in the US, 7th Edition, October 2016

[see report contents](#)

The Freedonia Group

www.freedoniagroup.com

Related Industry Studies

3415 *Natural Polymers*, May 2016

[see study contents](#)

3397 *World Flavors & Fragrances*, March 2016

[see study contents](#)

3354 *Drug Delivery Products*, December 2015

[see study contents](#)

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Pharmaceuticals: United States

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World Vaccines

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Trade Publications

Drug Discovery & Development

www.ddmag.com

Drug Topics

www.drugtopics.com

Natural Products Insider

www.naturalproductsinsider.com

Nutraceuticals World

www.nutraceuticalsworld.com

NutraIngredients USA

www.nutraingredients-usa.com

Nutrition Business Journal

www.newhope.com/nutrition-business-journal

Vitamin Retailer

www.vitaminretailer.com

Agencies & Associations

American Botanical Council

www.herbalgram.org

American Heart Association

www.heart.org

Centers for Disease Control and Prevention

www.cdc.gov

National Health and Nutrition Examination Survey

www.cdc.gov/nchs/nhanes

Global Organization for EPA and DHA Omega-3s

www.goedomega3.com

United States Census Bureau

www.census.gov

United States Department of Health and Human Services

www.hhs.gov

National Institutes of Health

www.nih.gov

National Cancer Institute

www.cancer.gov

United States Food and Drug Administration

www.fda.gov

United States International Trade Commission

www.usitc.gov

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