

Nutrition Business Journal[®]

Strategic Information for the Nutrition Industry



*NBJ's Global
Supplement
& Nutrition
Industry
Report*

2010

An analysis of markets, trends, competition and strategy in the Global
Nutrition Industry

TABLE OF CONTENTS

1. EXECUTIVE SUMMARY.....	15
2. ACKNOWLEDGEMENTS & DEFINITIONS.....	17
2.1. ACKNOWLEDGEMENTS	17
2.2. RESEARCH METHODOLOGY	17
2.2.1. <i>Disclaimer</i>	18
2.2.2. <i>Copyright</i>	18
2.3. DEFINITIONS.....	18
2.3.1. <i>Product Categories</i>	19
2.3.2. <i>Sales Channels</i>	21
2.3.3. <i>Global Regions</i>	21
3. GLOBAL NUTRITION INDUSTRY OVERVIEW.....	23
3.1. TOTAL NUTRITION INDUSTRY	23
3.2. GLOBAL SUPPLEMENT SALES	32
3.3. GLOBAL NATURAL & ORGANIC SALES.....	36
3.4. GLOBAL FUNCTIONAL FOOD SALES	39
3.5. GLOBAL NATURAL & ORGANIC PERSONAL CARE.....	42
3.6. GLOBAL NUTRITION INDUSTRY SURVEY SUMMARY.....	45
3.7. TRENDS & CASE STUDIES.....	56
3.7.1. <i>Trend: Global Focus on Preventive Health Driving Supplement Sales?</i>	56
3.7.2. <i>European Dietary Supplement Regulatory Changes Likely</i>	60
3.7.3. <i>Trend: IADSA Lobbying on Industry's Behalf</i>	61
3.7.4. <i>Trend: Botanicals Raising Regulatory Questions</i>	61
3.7.5. <i>Case Study: EU's Health Claims Legislation Has Industry Insiders on Edge</i>	61
3.7.1. <i>Case Study: Europe's Regulatory Worries</i>	65
4. UNITED STATES.....	67
4.1. U.S. NUTRITION INDUSTRY	67
4.1.1. <i>Product Category Sales</i>	68
4.1.2. <i>Channel Sales</i>	70
4.1.3. <i>Growth & Forecast</i>	74
4.2. U.S. DIETARY SUPPLEMENTS	75
4.2.1. <i>Dietary Supplements vs. U.S. Nutrition Industry</i>	75
4.2.2. <i>Product Category Sales</i>	77
4.2.3. <i>Channel Sales</i>	86
4.2.4. <i>Growth & Forecast</i>	87
4.2.5. <i>Consumer Usage Trends</i>	89
4.3. TRENDS.....	91
4.3.1. <i>Trend: Regulatory Changes Likely in U.S. Market</i>	91
4.3.2. <i>Case Study: Proposed Bill Would Modify Supplement Regs, Alter DSHEA</i>	91
4.3.3. <i>Case Study: Proposed Bill Generating Controversy</i>	92
4.3.4. <i>Case Study: If Passed, McCain Bill Would Eat Away at Supplement Sales</i>	93
5. CANADA.....	96
5.1. NUTRITION INDUSTRY	96
5.2. SUPPLEMENTS	101
5.3. TRENDS.....	104
5.3.1. <i>Case Study: Canadian Company Thrives at the Bottom of the U.S. Organic Food Chain</i>	104

6. LATIN AMERICA.....	107
6.1. NUTRITION INDUSTRY	107
6.2. SUPPLEMENTS	110
6.3. TRENDS	113
6.3.1. <i>Trend: Fragmented Latin American Markets Make Regulatory Changes Difficult</i>	113
6.3.2. <i>Euromonitor Case Study: Venezuela Producing High Growth From a Small Base of Sales</i>	113
6.3.3. <i>Trend: Brazil Supplement Sales Flourish, Despite Tough Regulatory Environment</i>	114
6.3.4. <i>Trend: Vitamins Being Reformulated as Foods</i>	115
6.3.5. <i>Trend: Regulation Tightens in Brazil</i>	116
6.3.6. <i>Trend: Seniors Turning to Supplements</i>	116
7. WESTERN EUROPE	118
7.1. GERMANY.....	120
7.1.1. <i>Nutrition Industry</i>	120
7.1.2. <i>Supplements</i>	123
7.1.3. <i>Case Study: German Company Taking Drug Route for Its Herbal Products in 49 Global Markets</i>	125
7.2. FRANCE.....	128
7.2.1. <i>Nutrition Industry</i>	128
7.2.2. <i>Supplements</i>	131
7.3. UNITED KINGDOM.....	134
7.3.1. <i>Nutrition Industry</i>	134
7.3.2. <i>Supplements</i>	137
7.4. ITALY	140
7.4.1. <i>Nutrition Industry</i>	140
7.4.2. <i>Supplements</i>	143
7.5. SCANDINAVIA	147
7.5.1. <i>Nutrition Industry</i>	147
7.5.2. <i>Supplements</i>	150
7.6. SPAIN	153
7.6.1. <i>Nutrition Industry</i>	153
7.6.2. <i>Supplements</i>	156
7.6.3. <i>Case Study: Spain Proves to Be a Leader in Functional Food Innovation</i>	159
7.7. SWITZERLAND & AUSTRIA.....	163
7.7.1. <i>Nutrition Industry</i>	163
7.7.2. <i>Supplements</i>	166
7.8. NETHERLANDS	169
7.8.1. <i>Nutrition Industry</i>	169
7.8.2. <i>Supplements</i>	172
7.9. BELGIUM & LUXEMBOURG.....	175
7.9.1. <i>Nutrition Industry</i>	175
7.9.2. <i>Supplements</i>	178
8. EASTERN EUROPE/RUSSIA.....	181
8.1. RUSSIA/OTHER EASTERN EUROPE	182
8.1.1. <i>Nutrition Industry</i>	182
8.1.2. <i>Supplements</i>	185
8.1.3. <i>Case Study: Russian Manufacturers Form Supplement Trade Association</i>	188
8.1.4. <i>Trend: Fortified Food Sales In Russia Growing</i>	189
8.1.5. <i>Trend: Romania Tops Growth Charts</i>	189
8.1.6. <i>Trend: Russian Market Capturing Attention of Foreign Supplement Firms</i>	189
8.1.7. <i>Trend: IADSA Helping Shape Russian Regulations</i>	192
8.2. POLAND	193

8.2.1.	Nutrition Industry	193
8.2.2.	Supplements	196
9.	MIDDLE EAST	199
9.1.1.	Nutrition Industry	199
9.1.2.	Supplements	203
9.1.3.	Case Study: Israeli-based Company Grows By Adapting Western Trends to Middle Eastern Health Market.....	205
10.	ASIA	209
10.1.	JAPAN	209
10.1.1.	Nutrition Industry	209
10.1.2.	Supplements	212
10.2.	CHINA	215
10.2.1.	Nutrition Industry	215
10.2.2.	Supplements	219
10.2.3.	Trend: China' Population Can Support Industry Growth.....	222
10.2.4.	Case Study: China Remains Poised to Become the World's Top Supplement Market	223
10.3.	INDIA & OTHER ASIA	226
10.3.1.	Nutrition Industry	226
10.3.2.	Supplements	230
10.3.3.	Trend: Asian Regulatory Changes Likely.....	233
10.3.4.	Case Study: Is Vietnam The Next Asian Tiger?.....	234
10.3.5.	Case Study: Singapore-Based Supplement Company Generates \$300 Million in Sales	234
11.	AUSTRALIA, NEW ZEALAND AND PACIFIC.....	238
11.1.	NUTRITION INDUSTRY	238
11.1.1.	Supplements	242
11.1.2.	Case Study: New Zealand Beats Back Regulatory Change — For Now.....	244
12.	AFRICA	248
12.1.1.	Nutrition Industry	248
12.1.2.	Supplements	251
12.1.3.	Case Study: Canadian Company Describes Entry into West Africa's Supplement Market.....	254
13.	FUNCTIONAL INGREDIENTS MAGAZINE GLOBAL COVERAGE.....	258
13.1.	EU'S DEFINITION OF HEALTH IS TOO NARROW, SAYS BENE0	258
13.2.	TOP 10 EU TRENDS FOR FUNCTIONAL INGREDIENTS	258
13.3.	FIRST EU HEALTH CLAIMS BECOME LAW	260
13.4.	GERMAN GOVERNMENT ADVOCATES BANNING ENERGY SHOTS	260
13.5.	MALAYSIAN DAIRY MARKET SET FOR GROWTH	261
13.6.	EAS REPORT SHOWS STRONG DEMAND FOR FUNCTIONAL FOODS IN ASIA	261
13.7.	SUPPLEMENT SALES SOAR IN INDIA AS CONSUMERS CLAMOUR FOR HEALTH FIX	262
13.8.	NATURAL HAIR CARE ON THE RISE GLOBALLY	262
13.9.	CHINA PASSES NEW LAW IN WAKE OF MILK SCANDAL	263
13.10.	CHINA CONSUMERS APPEAR READY TO EMBRACE BIOTECHNOLOGY	263
13.11.	GLOBAL DEMAND FOR INGREDIENTS EXPECTED TO RISE 6% PER YEAR	264

INDEX OF FIGURES

Figure 3-1 Global Nutrition Industry Sales by Product, 2008	24
Figure 3-2 Global Nutrition Industry Sales by Product, 1999-2008	25
Figure 3-3 Global Nutrition Industry Sales Growth by Product, 1999-2008	25
Figure 3-4 Global Nutrition Industry Sales by Region, 1999-2008	26
Figure 3-5 Global Nutrition Industry Sales Growth by Region, 1999-2008	26
Figure 3-6 Global Nutrition Industry Sales by Product, 2009e-2014e	27
Figure 3-7 Global Nutrition Industry Sales & Growth, 2000-2014e	27
Figure 3-8 Global Nutrition Industry Sales by Region, 2009e-2014e	28
Figure 3-9 Global Nutrition Industry Sales, Developed vs. Developing Markets, 1995-2008	28
Figure 3-10 Global GDP per Capita, 2000-2008	29
Figure 3-11 Global GDP per Capita by Region, 2008	29
Figure 3-12 Global Nutrition Dollars Spent per Capita, 2000-2008	30
Figure 3-13 Global Nutrition Dollars Spent Per Capita by Region, 2008	30
Figure 3-14 Developed vs. Developing Countries GDP Per Capita Growth, 2001-2017e	31
Figure 3-15 Developed vs. Developing Countries Nutrition Dollars Spent/Capita Growth, 2001-2014e	31
Figure 3-16 Global Supplement Sales by Product, 2008	32
Figure 3-17 Global Supplement Sales by Product, 1999-2008	32
Figure 3-18 Global Supplement Sales Growth by Product, 1999-2008	33
Figure 3-19 Global Supplement Sales by Region, 2008	33
Figure 3-20 Global Supplement Sales by Region, 1999-2008	34
Figure 3-21 Global Supplement Sales Growth by Region, 2000-2008	34
Figure 3-22 Global Supplement Industry Sales & Growth, 2000-2014e	35
Figure 3-23 Global Supplement Sales by Region, 2009e-2014e	35
Figure 3-24 Global Natural & Organic Food Sales by Region, 2008	36
Figure 3-25 Global Natural & Organic Food Sales by Region, 1999-2008	37
Figure 3-26 Global Natural & Organic Food Sales Growth by Region, 2000-2008	37
Figure 3-27 Global Natural & Organic Food Industry Sales & Growth, 2000-2014e	38
Figure 3-28 Global Functional Food Sales by Region, 2008	39
Figure 3-29 Global Functional Food Sales by Region, 1999-2008	40
Figure 3-30 Global Functional Food Sales Growth by Region, 2000-2008	40
Figure 3-31 Global Functional Food Industry Sales & Growth, 2000-2014e	41
Figure 3-32 Global Functional Food Sales Forecasts by Region, 2009e-2010e	41
Figure 3-33 Global N&OPC Sales by Region, 2008	42
Figure 3-34 Global N&OPC Sales by Region, 1999-2008	43
Figure 3-35 Global N&OPC Sales Growth by Region, 2000-2008	43
Figure 3-36 Global N&OPC Industry Sales & Growth, 2000-2014e	44
Figure 3-37 Global N&OPC Sales Forecasts by Region, 2009e-2010e	44
Figure 3-38 Importance of Consumer Related Issues	45
Figure 3-39 Respondent Demographics	46
Figure 3-40 Importance of Education Related Issues	47
Figure 3-41 Global Economy: Predicted Emergence from Recession	48
Figure 3-42 Countries Currently Offering Greatest Nutrition Industry Opportunities	48
Figure 3-43 Countries Expected to Offer Greatest Nutrition Industry Opportunities in Five Years	50
Figure 3-44 Condition Specific Breakdown	50
Figure 3-45 Respondents' Company Size, 2008 Wholesale Sales	52

Figure 3-46 Respondents' 2008 Sales Growth	52
Figure 3-47 Respondents' Forecasted 2009 Wholesale Sales Growth	53
Figure 3-48 Respondents' Forecasted 2010-2012 Average Growth	53
Figure 3-49 Respondents' Sales Category Breakdown	54
Figure 3-50 Respondents' Sales Channel Breakdown.....	54
Figure 3-51 Respondents' Regional Sales Breakdown.....	55
Figure 3-52 Supplement Delivery Mechanisms	56
Figure 4-1 U.S. Total Nutrition Industry Sales by Product, 2008.....	68
Figure 4-2 U.S. Nutrition Industry Sales by Product , 1998-2008.....	68
Figure 4-3 U.S. Nutrition Industry Sales Growth by Product, 1998-2008	69
Figure 4-4 U.S. Nutrition Industry Sales by Product as % of Total, 1998-2008	69
Figure 4-5 U.S. Nutrition Industry Sales Growth by Product, 2008.....	69
Figure 4-6 U.S. Nutrition Industry Sales & Growth, 2000-2017e	70
Figure 4-7 U.S. Total Nutrition Industry Sales by Channel, 2008	71
Figure 4-8 U.S. Nutrition Industry Sales & Growth by Channel, 2008	72
Figure 4-9 U.S. Nutrition Industry Sales & Growth by Channel, 2007	72
Figure 4-10 U.S. Nutrition Industry Sales & Growth by Channel, 2006	73
Figure 4-11 U.S. Nutrition Industry Sales by Channel, 1998-2008	73
Figure 4-12 U.S. Nutrition Industry Sales by Product, 2009e-2017e.....	74
Figure 4-13 U.S. Nutrition Industry Sales Growth by Product, 2009e-2017e	74
Figure 4-14 U.S. Nutrition Industry Sales by Product as % of Total, 2009e-2017e.....	74
Figure 4-15 U.S. Nutrition Industry Estimated Compound Annual Sales Growth, 2009e-2017e.....	75
Figure 4-16 U.S. Dietary Supplements vs. Total Nutrition Industry, 1998-2008.....	75
Figure 4-17 U.S. Dietary Supplements vs. Total Nutrition Industry Sales Growth, 2000-2017e.....	76
Figure 4-18 U.S. Dietary Supplement Sales by Product Category in 2008	77
Figure 4-19 U.S. Dietary Supplement Sales by Product , 1998-2008.....	77
Figure 4-20 U.S. Dietary Supplement Sales Growth by Product , 1998-2008	78
Figure 4-21 U.S. Dietary Supplement Sales by Product as % of Total , 1998-2008.....	78
Figure 4-22 U.S. Dietary Supplement Sales Growth by Product, 2008	79
Figure 4-23 U.S. Dietary Supplement Sales & Growth, 2000-2017e	79
Figure 4-24 U.S. Dietary Supplements Product Category Sales Growth, 2000-2017e.....	80
Figure 4-25 Top 50 Dietary Supplement Companies in 2008: Part I	81
Figure 4-26 Top 50 Dietary Supplement Companies in 2008: Part II	82
Figure 4-27 Top 100 Dietary Supplements According to U.S. Sales, 2002-2008: Part I	83
Figure 4-28 Top 100 Dietary Supplements According to U.S. Sales, 2002-2008: Part II.....	84
Figure 4-29 Top 100 Dietary Supplements According to U.S. Sales, 2002-2008: Part III.....	85
Figure 4-30 U.S. Dietary Supplement Sales by Channel, 2008	86
Figure 4-31 U.S. Dietary Supplement Sales and Annual Growth by Channel, 2006-2008.....	86
Figure 4-32 U.S. Dietary Supplement Sales by Channel, 2000-2008	87
Figure 4-33 U.S. Dietary Supplement Sales by Product, 2009e-2017e.....	87
Figure 4-34 U.S. Dietary Supplement Sales Growth by Product, 2009e-2017e	88
Figure 4-35 U.S. Dietary Supplement Sales by Product as % of Total, 2009e-2017e.....	88
Figure 4-36 U.S. Dietary Supplements Estimated Compound Annual Sales Growth, 2009e-2017e	89
Figure 4-37 U.S. Consumer Use of Dietary Supplements, 2008	90
Figure 4-38 U.S. Herb & Botanical Use by Adults as % of Total Market Share , 1999-2008	90
Figure 4-39 U.S. Herb & Botanical Use by Adults by Millions of Users, 1999-2008.....	90
Figure 5-1 Canada Nutrition Industry Sales by Product, 2008	96

Figure 5-2 Canada vs. Global Nutrition Industry, 1999-2008	97
Figure 5-3 Canada Nutrition Industry Sales by Product, 1999-2008	97
Figure 5-4 Canada Nutrition Industry Sales Growth by Product, 2000-2008.....	97
Figure 5-5 Canada Nutrition Industry Sales as % of Total, 1999-2008	98
Figure 5-6 Canada Nutrition Industry Compound Annual Sales Growth, 1999-2008.....	98
Figure 5-7 Canada Nutrition Industry Sales & Growth, 1999-2010e.....	99
Figure 5-8 Canada Nutrition Industry Estimated Sales and Growth by Product, 2009e-2010e	99
Figure 5-9 Canada GDP and Nutrition per Capita, 2000-2008	100
Figure 5-10 Canada Nutrition vs. GDP per Capita Growth, 2001-2014e	100
Figure 5-11 Canada GDP and Nutrition per Capita, 2009e-2014e.....	101
Figure 5-12 Canada Supplement Sales by Product, 2008	102
Figure 5-13 Canada Supplement Sales by Product, 1999-2008	102
Figure 5-14 Canada Supplement Sales Growth by Product, 2000-2008	103
Figure 5-15 Canada Supplement Sales as % of Total, 1999-2008.....	103
Figure 5-16 Canada Supplement Sales and Growth Forecast by Product, 2009e-2010e	104
Figure 6-1 Latin America Nutrition Industry Sales by Product, 2008	107
Figure 6-2 Latin America vs. Global Nutrition Industry, 1999-2008	108
Figure 6-3 Latin America Nutrition Industry Sales by Product, 1999-2008.....	108
Figure 6-4 Latin America Nutrition Industry Sales Growth by Product, 2000-2008	108
Figure 6-5 Latin America Nutrition Industry Sales as % of Total, 1999-2008.....	109
Figure 6-6 Latin America Nutrition Industry Compound Annual Sales Growth, 1999-2008	109
Figure 6-7 Latin America Nutrition Industry Sales & Growth, 1999-2010e	110
Figure 6-8 Latin America Nutrition Industry Estimated Sales and Growth by Product, 2009e-2010e	110
Figure 6-9 Latin America Supplement Sales by Country, 2000-2008	111
Figure 6-10 Latin America Supplement Sales by Product, 2008.....	111
Figure 6-11 Latin America Supplement Sales by Product, 1999-2008	112
Figure 6-12 Latin America Supplement Sales Growth by Product, 2000-2008	112
Figure 6-13 Latin America Supplement Sales as % of Total, 1999-2008	112
Figure 6-14 Latin America Supplement Sales and Growth Forecast by Product, 2009e-2010e	113
Figure 7-1 European Supplement Sales by Region, 1999-2008	119
Figure 7-2 Germany Nutrition Industry Sales by Product, 2008.....	120
Figure 7-3 Germany vs. Global Nutrition Industry, 1999-2008	120
Figure 7-4 Germany Nutrition Industry Sales by Product, 1999-2008	121
Figure 7-5 Germany Nutrition Industry Sales Growth by Product, 2000-2008.....	121
Figure 7-6 Germany Nutrition Industry Sales as % of Total, 1999-2008	121
Figure 7-7 Germany Nutrition Industry Compound Annual Sales Growth, 1999-2008.....	122
Figure 7-8 Germany Nutrition Industry Sales & Growth, 1999-2010e	122
Figure 7-9 Germany Nutrition Industry Sales & Growth Forecast by Product, 2009e-2010e	123
Figure 7-10 Germany Supplement Sales by Product, 2008	123
Figure 7-11 Germany Supplement Sales by Product, 1999-2008	124
Figure 7-12 Germany Supplement Sales Growth by Product, 2000-2008	124
Figure 7-13 Germany Supplement Sales as % of Total, 1999-2008	124
Figure 7-14 Germany Supplement Sales and Growth Forecast by Product, 2009e-2010e	125
Figure 7-15 France Nutrition Industry Sales by Product, 2008.....	128
Figure 7-16 France vs. Global Nutrition Industry, 1999-2008.....	129
Figure 7-17 France Nutrition Industry Sales by Product, 1999-2008	129
Figure 7-18 France Nutrition Industry Sales Growth by Product, 2000-2008.....	129
Figure 7-19 France Nutrition Industry Sales as % of Total, 1999-2008	130

Figure 7-20 France Nutrition Industry Compound Annual Sales Growth, 1999-2008	130
Figure 7-21 France Nutrition Industry Sales & Growth, 1999-2010e	131
Figure 7-22 France Nutrition Industry Sales & Growth Forecast by Product, 2009e-2010e	131
Figure 7-23 France Supplement Sales by Product, 2008	132
Figure 7-24 France Supplement Sales by Product, 1999-2008	132
Figure 7-25 France Supplement Sales Growth by Product, 2000-2008.....	133
Figure 7-26 France Supplement Sales as % of Total, 1999-2008	133
Figure 7-27 France Supplement Sales and Growth Forecast by Product, 2009e-2010e.....	133
Figure 7-28 United Kingdom Nutrition Industry Sales by Product, 2008.....	134
Figure 7-29 United Kingdom vs. Global Nutrition Industry, 1999-2008.....	135
Figure 7-30 United Kingdom Nutrition Industry Sales by Product, 1999-2008.....	135
Figure 7-31 United Kingdom Nutrition Industry Sales Growth by Product, 2000-2008	135
Figure 7-32 United Kingdom Nutrition Industry Sales as % of Total, 1999-2008	136
Figure 7-33 United Kingdom Nutrition Industry Compound Annual Sales Growth, 1999-2008	136
Figure 7-34 United Kingdom Nutrition Industry Sales & Growth, 1999-2010e	137
Figure 7-35 United Kingdom Nutrition Industry Sales and Growth Forecast by Product, 2009e-2010e	137
Figure 7-36 United Kingdom Supplement Sales by Product, 2008.....	138
Figure 7-37 United Kingdom Supplement Sales by Product, 1999-2008	138
Figure 7-38 United Kingdom Supplement Sales Growth by Product, 2000-2008.....	139
Figure 7-39 United Kingdom Supplement Sales as % of Total, 1999-2008	139
Figure 7-40 United Kingdom Supplement Sales & Growth Forecast by Product, 2009e-2010e	139
Figure 7-41 Italy Nutrition Industry Sales by Product, 2008	140
Figure 7-42 Italy vs. Global Nutrition Industry, 1999-2008	141
Figure 7-43 Italy Nutrition Industry Sales by Product, 1999-2008	141
Figure 7-44 Italy Nutrition Industry Sales Growth by Product, 2000-2008.....	141
Figure 7-45 Italy Nutrition Industry Sales as % of Total, 1999-2008	142
Figure 7-46 Italy Nutrition Industry Compound Annual Sales Growth, 1999-2008.....	142
Figure 7-47 Italy Nutrition Industry Sales & Growth, 1999-2010e.....	143
Figure 7-48 Italy Nutrition Industry Sales & Growth Forecast by Product, 2009e-2010e	143
Figure 7-49 Italy Supplement Sales by Product, 2008	144
Figure 7-50 Italy Supplement Sales by Product, 1999-2008	144
Figure 7-51 Italy Supplement Sales Growth by Product, 2000-2008	145
Figure 7-52 Italy Supplement Sales as % of Total, 1999-2008.....	145
Figure 7-53 Italy Supplement Sales & Growth Forecast by Product, 2009e-2010e.....	146
Figure 7-54 Scandinavia Nutrition Industry Sales by Product, 2008	147
Figure 7-55 Scandinavia vs. Global Nutrition Industry, 1999-2008.....	148
Figure 7-56 Scandinavia Nutrition Industry Sales by Product, 1999-2008.....	148
Figure 7-57 Scandinavia Nutrition Industry Sales Growth by Product, 2000-2008	148
Figure 7-58 Scandinavia Nutrition Industry Sales as % of Total, 1999-2008.....	149
Figure 7-59 Scandinavia Nutrition Industry Compound Annual Sales Growth, 1999-2008	149
Figure 7-60 Scandinavia Nutrition Industry Sales & Growth, 1999-2010e	150
Figure 7-61 Scandinavia Nutrition Industry Sales & Growth Forecast by Product, 2009e-2010e.....	150
Figure 7-62 Scandinavia Supplement Sales by Product, 2008.....	151
Figure 7-63 Scandinavia Supplement Sales by Product, 1999-2008	151
Figure 7-64 Scandinavia Supplement Sales Growth by Product, 2000-2008	152
Figure 7-65 Scandinavia Supplement Sales as % of Total, 1999-2008	152
Figure 7-66 Scandinavia Supplement Sales and Growth Forecast by Product, 2009e-2010e.....	152

Figure 7-67 Spain Nutrition Industry Sales by Product, 2008..... 153

Figure 7-68 Spain vs. Global Nutrition Industry, 1999-2008 154

Figure 7-69 Spain Nutrition Industry Sales by Product, 1999-2008 154

Figure 7-70 Spain Nutrition Industry Sales Growth by Product, 2000-2008..... 154

Figure 7-71 Spain Nutrition Industry Sales as % of Total, 1999-2008 155

Figure 7-72 Spain Nutrition Industry Compound Annual Sales Growth, 1999-2008..... 155

Figure 7-73 Spain Nutrition Industry Sales & Growth, 1999-2010e 156

Figure 7-74 Spain Nutrition Industry Sales and Growth Forecast by Product, 2009e-2010e..... 156

Figure 7-75 Spain Supplement Sales by Product, 2008 157

Figure 7-76 Spain Supplement Sales by Product, 1999-2008 157

Figure 7-77 Spain Supplement Sales Growth by Product, 2000-2008..... 158

Figure 7-78 Spain Supplement Sales as % of Total, 1999-2008 158

Figure 7-79 Spain Supplement Sales & Growth Forecast by Product, 2009e-2010e 159

Figure 7-80 Switzerland & Austria Nutrition Industry Sales by Product, 2008..... 163

Figure 7-81 Switzerland & Austria vs. Global Nutrition Industry, 1999-2008..... 164

Figure 7-82 Switzerland & Austria Nutrition Industry Sales by Product, 1999-2008..... 164

Figure 7-83 Switzerland & Austria Nutrition Industry Sales Growth by Product, 2000-2008 164

Figure 7-84 Switzerland & Austria Nutrition Industry Sales as % of Total, 1999-2008 165

Figure 7-85 Switzerland & Austria Nutrition Industry Compound Annual Sales Growth, 1999-2008 165

Figure 7-86 Switzerland & Austria Nutrition Industry Sales & Growth, 1999-2010e 166

Figure 7-87 Switzerland & Austria Nutrition Industry Sales & Growth Forecast by Product, 2009e-2010e 166

Figure 7-88 Switzerland & Austria Supplement Sales by Product, 2008..... 167

Figure 7-89 Switzerland & Austria Supplement Sales by Product, 1999-2008 167

Figure 7-90 Switzerland & Austria Supplement Sales Growth by Product, 2000-2008..... 168

Figure 7-91 Switzerland & Austria Supplement Sales as % of Total, 1999-2008 168

Figure 7-92 Switzerland & Austria Supplement Sales and Growth Forecast by Product, 2009e-2010e..... 168

Figure 7-93 Netherlands Nutrition Industry Sales by Product, 2008 169

Figure 7-94 Netherlands vs. Global Nutrition Industry, 1999-2008 169

Figure 7-95 Netherlands Nutrition Industry Sales by Product, 1999-2008 170

Figure 7-96 Netherlands Nutrition Industry Sales Growth by Product, 2000-2008..... 170

Figure 7-97 Netherlands Nutrition Industry Sales as % of Total, 1999-2008 170

Figure 7-98 Netherlands Nutrition Industry Compound Annual Sales Growth, 1999-2008..... 171

Figure 7-99 Netherlands Nutrition Industry Sales & Growth, 1999-2010e..... 172

Figure 7-100 Netherlands Nutrition Industry Sales & Growth Forecast by Product, 2009e-2010e 172

Figure 7-101 Netherlands Supplement Sales by Product, 2008 173

Figure 7-102 Netherlands Supplement Sales by Product, 1999-2008..... 173

Figure 7-103 Netherlands Supplement Sales Growth by Product, 2000-2008 174

Figure 7-104 Netherlands Supplement Sales as % of Total, 1999-2008..... 174

Figure 7-105 Netherlands Supplement Sales and Growth Forecast by Product, 2009e-2010e 174

Figure 7-106 Belgium & Luxembourg Nutrition Industry Sales by Product, 2008 175

Figure 7-107 Belgium & Luxembourg vs. Global Nutrition Industry, 1999-2008..... 176

Figure 7-108 Belgium & Luxembourg Nutrition Industry Sales by Product, 1999-2008..... 176

Figure 7-109 Belgium & Luxembourg Nutrition Industry Sales Growth by Product, 2000-2008 176

Figure 7-110 Belgium & Luxembourg Nutrition Industry Sales as % of Total, 1999-2008..... 177

Figure 7-111 Belgium & Luxembourg Nutrition Industry Compound Annual Sales Growth, 1999-2008 177

Figure 7-112 Belgium & Luxembourg Nutrition Industry Sales & Growth, 1999-2010e 178

Figure 7-113 Belgium & Luxembourg Nutrition Industry Sales and Growth Forecast by Product, 2009e-2010e 178

Figure 7-114 Belgium & Luxembourg Supplement Sales by Product, 2008.....	179
Figure 7-115 Belgium & Luxembourg Supplement Sales by Product, 1999-2008.....	179
Figure 7-116 Belgium & Luxembourg Supplement Sales Growth by Product, 2000-2008.....	180
Figure 7-117 Belgium & Luxembourg Supplement Sales as % of Total, 1999-2008.....	180
Figure 7-118 Belgium & Luxembourg Supplement Sales & Growth Forecast by Product, 2009e-2010e.....	180
Figure 8-1 Russia/Eastern Europe Nutrition Industry Sales by Product, 2008.....	182
Figure 8-2 Russia/Eastern Europe vs. Global Nutrition Industry, 1999-2008.....	183
Figure 8-3 Russia/Eastern Europe Nutrition Industry Sales by Product, 1999-2008.....	183
Figure 8-4 Russia/Eastern Europe Nutrition Industry Sales Growth by Product, 2000-2008.....	183
Figure 8-5 Russia/Eastern Europe Nutrition Industry Sales as % of Total, 1999-2008.....	184
Figure 8-6 Russia/Eastern Europe Nutrition Industry Compound Annual Sales Growth, 1999-2008.....	184
Figure 8-7 Russia/Eastern Europe Nutrition Industry Sales & Growth, 1999-2010e.....	185
Figure 8-8 Russia/Eastern Europe Nutrition Industry Sales and Growth Forecast by Product, 2009e-2010e...	185
Figure 8-9 Russia Supplement Sales by Product, 2008.....	186
Figure 8-10 Russia/Eastern Europe Supplement Sales by Product, 1999-2008.....	186
Figure 8-11 Russia/Eastern Europe Supplement Sales Growth by Product, 2000-2008.....	187
Figure 8-12 Russia/Eastern Europe Supplement Sales as % of Total, 1999-2008.....	187
Figure 8-13 Russia/Eastern Europe Supplement Sales and Growth Forecast by Product, 2009e-2010e.....	188
Figure 8-14 Poland Nutrition Industry Sales by Product, 2008.....	193
Figure 8-15 Poland vs. Global Nutrition Industry, 1999-2008.....	193
Figure 8-16 Poland Nutrition Industry Sales by Product, 1999-2008.....	194
Figure 8-17 Poland Nutrition Industry Sales Growth by Product, 2000-2008.....	194
Figure 8-18 Poland Nutrition Industry Sales as % of Total, 1999-2008.....	194
Figure 8-19 Poland Nutrition Industry Compound Annual Sales Growth, 1999-2008.....	195
Figure 8-20 Poland Nutrition Industry Sales & Growth, 1999-2010e.....	195
Figure 8-21 Poland Nutrition Industry Sales and Growth Forecast by Product, 2009e-2010e.....	196
Figure 8-22 Poland Supplement Sales by Product, 2008.....	196
Figure 8-23 Poland Supplement Sales by Product, 1999-2008.....	197
Figure 8-24 Poland Supplement Sales Growth by Product, 2000-2008.....	197
Figure 8-25 Poland Supplement Sales as % of Total, 1999-2008.....	198
Figure 8-26 Poland Supplement Sales and Growth Forecast by Product, 2009e-2010e.....	198
Figure 9-1 Middle East Nutrition Industry Sales by Product, 2008.....	199
Figure 9-2 Middle East vs. Global Nutrition Industry, 1999-2008.....	200
Figure 9-3 Middle East Nutrition Industry Sales by Product, 1999-2008.....	200
Figure 9-4 Middle East Nutrition Industry Sales Growth by Product, 2000-2008.....	201
Figure 9-5 Middle East Nutrition Industry Sales as % of Total, 1999-2008.....	201
Figure 9-6 Middle East Nutrition Industry Compound Annual Sales Growth, 1999-2008.....	202
Figure 9-7 Middle East Nutrition Industry Sales & Growth, 1999-2010e.....	202
Figure 9-8 Middle East Nutrition Industry Sales and Growth Forecast by Product, 2009e-2010e.....	203
Figure 9-9 Middle East Supplement Sales by Product, 2008.....	203
Figure 9-10 Middle East Supplement Sales by Product, 1999-2008.....	204
Figure 9-11 Middle East Supplement Sales Growth by Product, 2000-2008.....	204
Figure 9-12 Middle East Supplement Sales as % of Total, 1999-2008.....	205
Figure 9-13 Middle East Supplement Sales and Growth Forecast by Product, 2009e-2010e.....	205
Figure 10-1 Japan Nutrition Industry Sales by Product, 2008.....	209
Figure 10-2 Japan vs. Global Nutrition Industry, 1999-2008.....	210
Figure 10-3 Japan Nutrition Industry Sales by Product, 1999-2008.....	210

Figure 10-4 Japan Nutrition Industry Sales Growth by Product, 2000-2008	210
Figure 10-5 Japan Nutrition Industry Sales as % of Total, 1999-2008	211
Figure 10-6 Japan Nutrition Industry Compound Annual Sales Growth, 1999-2008	211
Figure 10-7 Japan Nutrition Industry Sales & Growth, 1999-2010e.....	212
Figure 10-8 Japan Nutrition Industry Sales and Growth Forecast by Product, 2009e-2010e	212
Figure 10-9 Japan Supplement Sales by Product, 2008.....	213
Figure 10-10 Japan Supplement Sales by Product, 1999-2008.....	213
Figure 10-11 Japan Supplement Sales Growth by Product, 2000-2008	214
Figure 10-12 Japan Supplement Sales as % of Total, 1999-2008.....	214
Figure 10-13 Japan Supplement Sales and Growth Forecast by Product, 2009e-2010e	215
Figure 10-14 China Nutrition Industry Sales by Product, 2008	216
Figure 10-15 China vs. Global Nutrition Industry, 1999-2008	216
Figure 10-16 China Nutrition Industry Sales by Product, 1999-2008	217
Figure 10-17 China Nutrition Industry Sales Growth by Product, 2000-2008.....	217
Figure 10-18 China Nutrition Industry Sales as % of Total, 1999-2008	218
Figure 10-19 China Nutrition Industry Compound Annual Sales Growth, 1999-2008.....	218
Figure 10-20 China Nutrition Industry Sales & Growth, 1999-2010e.....	219
Figure 10-21 China Nutrition Industry Sales and Growth Forecast by Product, 2009e-2010e	219
Figure 10-22 China Supplement Sales by Product, 2008	220
Figure 10-23 China Supplement Sales by Product, 1999-2008.....	220
Figure 10-24 China Supplement Sales Growth by Product, 2000-2008	221
Figure 10-25 China Supplement Sales as % of Total, 1999-2008.....	222
Figure 10-26 China Supplement Sales and Growth Forecast by Product, 2009e-2010e	222
Figure 10-27 Other Asia Nutrition Industry Sales by Product, 2008	227
Figure 10-28 Other Asia vs. Global Nutrition Industry, 1999-2008	227
Figure 10-29 Other Asia Nutrition Industry Sales by Product, 1999-2008.....	228
Figure 10-30 Other Asia Nutrition Industry Sales Growth by Product, 2000-2008	228
Figure 10-31 Other Asia Nutrition Industry Sales as % of Total, 1999-2008.....	229
Figure 10-32 Other Asia Nutrition Industry Compound Annual Sales Growth, 1999-2008	229
Figure 10-33 Other Asia Nutrition Industry Sales & Growth, 1999-2010e	230
Figure 10-34 Other Asia Nutrition Industry Sales and Growth Forecast by Product, 2009e-2010e	230
Figure 10-35 Other Asia Supplement Sales by Product, 2008	231
Figure 10-36 Other Asia Supplement Sales by Product, 1999-2008.....	231
Figure 10-37 Other Asia Supplement Sales Growth by Product, 2000-2008	232
Figure 10-38 Other Asia Supplement Sales as % of Total, 1999-2008.....	232
Figure 10-39 Other Asia Supplement Sales and Growth Forecast by Product, 2009e-2010e	233
Figure 11-1 Australia/New Zealand Nutrition Industry Sales by Product, 2008.....	238
Figure 11-2 Australia/New Zealand vs. Global Nutrition Industry, 1999-2008.....	239
Figure 11-3 Australia/New Zealand Nutrition Industry Sales by Product, 1999-2008	239
Figure 11-4 Australia/New Zealand Nutrition Industry Sales Growth by Product, 2000-2008.....	240
Figure 11-5 Australia/New Zealand Nutrition Industry Sales as % of Total, 1999-2008	240
Figure 11-6 Australia/New Zealand Nutrition Industry Compound Annual Sales Growth, 1999-2008	241
Figure 11-7 Australia/New Zealand Nutrition Industry Sales & Growth, 1999-2010e	241
Figure 11-8 Australia/New Zealand Nutrition Industry Sales and Growth Forecast by Product, 2009e-2010e.....	242
Figure 11-9 Australia/New Zealand Supplement Sales by Product, 2008	242
Figure 11-10 Australia/New Zealand Supplement Sales by Product, 1999-2008	243
Figure 11-11 Australia/New Zealand Supplement Sales Growth by Product, 2000-2008.....	243
Figure 11-12 Australia/New Zealand Supplement Sales as % of Total, 1999-2008	244

Figure 11-13 Australia/New Zealand Supplement Sales and Growth Forecast by Product, 2009e-2010e.....	244
Figure 12-1 Africa Nutrition Industry Sales by Product, 2008	248
Figure 12-2 Africa vs. Global Nutrition Industry, 1999-2008	249
Figure 12-3 Africa Nutrition Industry Sales by Product, 1999-2008	249
Figure 12-4 Africa Nutrition Industry Sales Growth by Product, 2000-2008	249
Figure 12-5 Africa Nutrition Industry Sales as % of Total, 1999-2008	250
Figure 12-6 Africa Nutrition Industry Compound Annual Sales Growth, 1999-2008	250
Figure 12-7 Africa Nutrition Industry Sales & Growth, 1999-2010e	251
Figure 12-8 Africa Nutrition Industry Sales & Growth Forecast by Product, 2009e-2010e.....	251
Figure 12-9 Africa Supplement Sales by Product, 2008	252
Figure 12-10 Africa Supplement Sales by Product, 1999-2008.....	252
Figure 12-11 Africa Supplement Sales Growth by Product, 2000-2008	253
Figure 12-12 Africa Supplement Sales as % of Total, 1999-2008	253
Figure 12-13 Africa Supplement Sales & Growth Forecast by Product, 2009e-2010e	254

1. EXECUTIVE SUMMARY

Although not immune to the recessionary forces that have pummeled economies around the world, the global nutrition industry continues to grow—with China, Latin America, Australia/New Zealand, Eastern Europe/Russia and the Middle East each achieving double-digit sales expansion in 2008. According to *Nutrition Business Journal* estimates, total global nutrition industry sales—which *NBJ* defines as including dietary supplements, natural & organic foods and beverages, functional foods and beverages, and Natural & Organic Personal Care & Household Products (N&OPC)—increased a healthy 8% to \$270 billion in 2008. Surprisingly, the 8% increase the global nutrition industry experienced in 2008 was down only slightly compared to the 8.6% compound annual growth rate (CAGR) the industry achieved between 2001 and 2008. The 2008 growth is even more notable when contrasted to global gross domestic product (GDP) growth.

The factors supporting continued global nutrition industry expansion include an aging worldwide population; the continued spread of diabetes, heart disease and other chronic health ailments linked to poor nutritional habits; a growing consumer embrace of self care and natural therapies to prevent illness; and a burgeoning middle class stretching from Brazil to Ghana to India that has more money and more inclination to spend on health and wellness.

The United States continues to generate the majority of global nutrition sales, with Americans spending the most money per capita on nutrition products. Western Europe and Japan are the No. 2 and No. 3 largest nutrition markets—but Japan could soon be surpassed by China, which is home to a massive and growing middle-class population that is increasingly embracing supplements, natural & organic and other nutrition products. Other attractive developing nutrition markets include Brazil, India and Eastern Europe/Russia.

From a product perspective, the landscape of the global nutrition industry has changed relatively dramatically over the last decade. Specifically, as global interest in natural & organic has soared, the shares of sales represented by natural & organic foods and N&OPC products have grown, while supplements have lost share.

Global supplements sales, which are a primary focus of this report, increased 6% in 2008. The outbreak of the fear-provoking H1N1 flu pandemic, which surfaced in Mexico in April 2009 and touched nearly every country in the world by August, helped to lift sales all over the globe in 2009. The United States and Australia were two countries that also saw a recessionary boost to their supplement sales, as consumers searched for affordable ways to stay healthy and avoid costly doctor visits.

Despite its continued growth and desirable emerging markets, however, the global nutrition industry will face numerous challenges in 2010 and beyond. The one issue perhaps most poised to shape the future of worldwide nutrition industry sales—particularly of dietary supplements and functional ingredients—is the rising tide of regulatory changes sweeping the globe. Whether they operate in Europe, Asia, Latin America, Russia or North America, companies are either dealing with new regulations or awaiting potential changes that could affect everything from the ingredients that can be used in supplements to the health claims that can be made for these products.

NBJ's Global Supplement & Nutrition Industry Report 2010 addresses these and other issues affecting the worldwide nutrition industry. This 265-page report, which is based on more than 12 years of continuous research and detailed trend analysis for countries and regions spanning six continents, features:

- Consumer sales and growth estimates by country/region for dietary supplements, natural & organic foods and beverages, functional foods and beverages, and N&OPC products

- Breakout sections covering the United States, Canada, Germany, France, the United Kingdom, Italy, Scandinavia, Spain, Switzerland & Austria, the Netherlands, Belgium & Luxembourg, Poland, Russia, Japan, and Australia and New Zealand, as well as regional breakdowns for Latin America and Africa
- An analysis of global nutrition dollars spent per capita in the global nutrition industry
- A review of the regulatory issues and potential changes facing each country/region
- An overview of the findings from *NBJ's* 2009 Global Nutrition Industry Survey
- Discussion of how the growing global focus on preventive health will impact nutrition and supplement sales
- Interviews with CEOs and thought leaders from global nutrition industry firms and trade associations
- Bonus coverage from sister publication *Functional Ingredients* magazine