

Dietary Supplements Market by Type (Botanicals, Vitamins, Minerals, Amino Acids, Enzymes, Probiotics), Function, Mode of Application, Target Consumer, Distribution Channel (Pharmacy, Supermarket/Hypermarket, Online) and Region - Global Forecast to 2028

Market Report | 2023-06-05 | 442 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

According to MarketsandMarkets, the dietary supplements market size is estimated to be valued at USD 167.5 billion in 2023 and is projected to reach USD 239.4 billion by 2028, recording a CAGR of 7.4% in terms of value. Various factors, such as increasing health awareness, rising demand for preventive healthcare, aging population, expanding e-commerce, and the preference for natural and sustainable products drive the market.

Dietary supplements are used to supplement the diet and provide essential nutrients, vitamins, minerals, herbs, or other beneficial substances. They help support overall health, fill nutritional gaps, and address specific health concerns. Dietary supplements come in various forms such as tablets, capsules, powders, liquids, soft gels, and gel capsules. They can be taken as additional supplements to enhance nutrient intake, as medicinal supplements to address specific deficiencies or health conditions, or as sports nutrition supplements to enhance athletic performance and support muscle recovery. These different types and applications of dietary supplements cater to a wide range of health and wellness needs.

The dietary supplements market is expected to witness significant growth during the forecast period increasing demand for health and wellness products, preventive healthcare, and the trend toward self-care and personal well-being. Manufacturers are continuously investing and expanding their market to meet the growing demand for dietary supplements. For example, Nestle strengthens its presence in the Brazilian dietary supplements market with the acquisition of PurVida, Brazil.

"By type, the Vitamins segment is the largest segment during the forecast period."

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Vitamins play a crucial role in maintaining overall health and are essential for various bodily functions. Factors driving the growth of the vitamin segment include increasing health awareness, rising prevalence of vitamin deficiencies, and a growing focus on preventive healthcare. Consumers are seeking to fill nutritional gaps through vitamin supplementation to support their well-being. The availability of a wide range of vitamin formulations, including single vitamins or multivitamin combinations, caters to diverse consumer needs. With the increasing emphasis on maintaining optimal nutrition, the vitamin segment is expected to witness significant growth in the dietary supplements market.

"By function, the additional supplements segment is expected to grow at the highest growth rate during the forecast period."

Additional supplements encompass a wide range of products aimed at supporting overall health and well-being. These supplements provide additional nutrients, such as vitamins, minerals, antioxidants, or herbal extracts, to supplement the daily diet and fill nutritional gaps. The increasing demand for preventive healthcare and the growing emphasis on maintaining optimal nutrition are driving the growth of the additional supplements segment. Consumers are seeking these supplements to enhance their overall health, boost immune function, support energy levels, and promote specific health benefits. The availability of a diverse range of additional supplements catering to various health concerns contributes to the segment's dominance in the dietary supplements market.

"By mode of application, the liquid segment is projected to grow at the highest CAGR in the dietary supplements markets."

The popularity of liquid dietary supplements can be attributed to several factors. Liquids offer convenience and ease of consumption, especially for individuals who have difficulty swallowing pills or capsules. They provide a quick and efficient way to deliver nutrients to the body. Liquid supplements often have faster absorption rates compared to other forms, allowing for quicker nutrient uptake. Additionally, liquids are highly versatile, as they can be formulated with various ingredients, flavors, and concentrations to meet specific consumer preferences and health needs. The liquid segment's growth is driven by the demand for convenient, fast-acting, and customizable dietary supplements.

"By target consumer, the adult segment is expected to dominate the market during the forecast period."

The adult segment is projected to dominate the dietary supplements market during the forecast period. Several factors contribute to this dominance. Adults generally have higher purchasing power and a greater emphasis on maintaining their health and well-being. They are more likely to proactively seek out dietary supplements to support their nutritional needs and address specific health concerns. The adult population encompasses a wide range of age groups, each with different nutritional requirements. This diversity drives the demand for a variety of dietary supplements tailored to address specific age-related concerns, such as bone health, heart health, cognitive function, and immune support. The adult segment's dominance reflects the significant market potential and wide-ranging needs within this consumer group.

"By distribution channel, the online segment is expected to grow at a significant CAGR during the forecast period."

The online segment is projected to be the largest distribution channel within the dietary supplements market during the forecast period. Several factors contribute to the dominance of the online segment. The increasing penetration of e-commerce platforms and the growing trend of online shopping have made dietary supplements easily accessible to consumers. Online platforms offer a wide range of products, enabling consumers to explore a broader selection and compare prices conveniently. The online segment provides a platform for direct-to-consumer brands and smaller supplement manufacturers to reach a wider audience without the need for extensive physical distribution networks. Additionally, the convenience, 24/7 availability, and doorstep delivery offered by online channels align with consumer preferences for seamless shopping experiences, contributing to the online segment's market dominance.

"Asia Pacific market is estimated to be the fastest-growing region in the dietary supplements market."

Asia Pacific is poised to be the fastest-growing region in the dietary supplements market during the forecast period. Several factors contribute to this growth. The region is experiencing rapid urbanization, along with rising disposable incomes and a growing middle class, leading to increased consumer spending on health and wellness products. There is a rising awareness of preventive healthcare and a shift towards proactive approaches to well-being among consumers in the region. Moreover, the popularity of traditional medicine and herbal supplements, coupled with a strong cultural inclination towards natural and holistic remedies, further drives the demand for dietary supplements. The expanding e-commerce landscape in the Asia Pacific provides convenient access to a wide variety of dietary supplements, bolstering market growth in the region.

Breakdown of Primaries:

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

In-depth interviews were conducted with various key industry participants, subject-matter experts, C-level executives of key market players, and industry consultants, among other experts, to obtain and verify critical qualitative and quantitative information, as well as to assess future market prospects. The distribution of primary interviews is as follows:

By Value Chain: Demand side- 41%, Supply side- 59%

By Designation: CXOs- 33%, Managers- 25%, Executives- 42%

By Region: Asia Pacific- 30%, Europe- 29%, North America- 24%, and RoW - 17%

Key players operating in this market are Nestle (Switzerland), Abbott (US), Amway Corp (US), Pfizer Inc. (US), ADM (US), International Flavors & Fragrance (US), and Otsuka Holdings Co., Ltd (Japan).

Research Coverage:

This research report categorizes the Dietary supplements market by Type (Botanicals, Vitamins, Minerals, Amino acids, Enzymes, Probiotics, and Other Dietary Supplements), by Function (Additional Supplement, Medical Supplement, Sports Nutrition Supplements), by Mode of Application (Tablets, Capsules, Liquid, Powder, Soft gels, Gel caps), by Target Consumer (Infants, Children, Adults, Pregnant Women and Elderly), by Distribution Channel (Pharmacy, Supermarket/Hypermarket and Online) and Region (North America, Europe, Asia Pacific, South America and RoW). The report's scope covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the dietary supplements market. A detailed analysis of the key industry players has been done to provide insights into their business overview, solutions, new product launches, mergers & acquisitions, partnerships, agreements, and other recent developments in the dietary supplements market. Competitive analysis of coming startups in the dietary supplements market is covered in this report.

Reasons to buy this report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall dietary supplements market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market's pulse and provide them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

□ Analysis of key drivers (shift in consumer preferences towards health and prevention, the rising burden of chronic ailments, the increasing use of supplements among the geriatric population, and the growing retail sales of functional foods), restraints (the high cost of supplements, the significant investments required for research and development and cost of clinical trials), opportunities (shift towards plant-based supplements, driven by increasing consumer awareness of micronutrient deficiencies and government mandates related to food fortification), and challenges (Consumer skepticism and the presence of fake supplements associated with nutraceutical products and Challenging regulatory environment) influencing the growth of the dietary supplements market

□ Product Development/Innovation: Detailed insights on coming technologies, R&D activities, and product launches in the dietary supplements market.

□ Market Development: Comprehensive information about lucrative markets ? the report analyses the dietary supplements market across varied regions.

□ Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the dietary supplements market.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

?Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Nestle, Abbott, Amway Corp, Pfizer Inc., ADM, and among others in the dietary supplements market.

Table of Contents:

1INTRODUCTION44

1.1STUDY OBJECTIVES44

1.2MARKET DEFINITION44

1.3STUDY SCOPE45

FIGURE 1MARKET SEGMENTATION45

1.3.1INCLUSIONS & EXCLUSIONS45

1.3.2REGIONS COVERED46

1.4YEARS CONSIDERED47

1.5CURRENCY CONSIDERED47

TABLE 1USD EXCHANGE RATES CONSIDERED, 2018-202248

1.6UNIT CONSIDERED48

1.7STAKEHOLDERS48

1.8SUMMARY OF CHANGES49

1.9RECESSION IMPACT ANALYSIS49

2RESEARCH METHODOLOGY50

2.1RESEARCH DATA50

FIGURE 2DIETARY SUPPLEMENTS MARKET: RESEARCH DESIGN50

2.1.1SECONDARY DATA51

2.1.1.1Key data from secondary sources51

2.1.2PRIMARY DATA51

2.1.2.1Key data from primary sources52

2.1.2.2Key industry insights52

2.1.2.3Breakdown of primary interviews53

FIGURE 3BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION53

2.1.2.4Primary sources54

2.2MARKET SIZE ESTIMATION54

2.2.1APPROACH ONE: BOTTOM-UP55

FIGURE 4DIETARY SUPPLEMENTS MARKET: APPROACH ONE (BOTTOM-UP APPROACH)55

2.2.2APPROACH TWO: TOP-DOWN56

FIGURE 5DIETARY SUPPLEMENTS MARKET: TOP-DOWN APPROACH56

2.3DATA TRIANGULATION57

FIGURE 6DATA TRIANGULATION METHODOLOGY57

2.4RESEARCH ASSUMPTIONS58

FIGURE 7ASSUMPTIONS58

2.5LIMITATIONS59

FIGURE 8STUDY LIMITATIONS AND RISK ASSESSMENT59

?

2.6RECESSION IMPACT ON DIETARY SUPPLEMENTS MARKET59

2.6.1MACROINDICATORS OF RECESSION59

FIGURE 9INDICATORS OF RECESSION60

FIGURE 10WORLD INFLATION RATE, 2011-202160

FIGURE 11GLOBAL GDP, 2011-2021 (USD TRILLION)61

FIGURE 12RECESSION INDICATORS AND THEIR IMPACT ON DIETARY SUPPLEMENTS MARKET62

FIGURE 13 GLOBAL DIETARY SUPPLEMENTS MARKET: EARLIER FORECAST VS. RECESSION FORECAST 63

3 EXECUTIVE SUMMARY 64

TABLE 2 DIETARY SUPPLEMENTS MARKET SNAPSHOT, 2023 VS. 2028 65

FIGURE 14 DIETARY SUPPLEMENTS MARKET SIZE, BY TYPE, 2023 VS. 2028 (USD MILLION) 66

FIGURE 15 DIETARY SUPPLEMENTS MARKET SIZE, BY MODE OF APPLICATION, 2023 VS. 2028 (USD MILLION) 66

FIGURE 16 DIETARY SUPPLEMENTS MARKET SIZE, BY FUNCTION, 2023 VS. 2028 (USD MILLION) 66

FIGURE 17 DIETARY SUPPLEMENTS MARKET SIZE, BY TARGET CONSUMER, 2023 VS. 2028 (USD MILLION) 67

FIGURE 18 DIETARY SUPPLEMENTS MARKET SIZE, BY DISTRIBUTION CHANNEL, 2023 VS. 2028 (USD MILLION) 67

FIGURE 19 REGIONAL SNAPSHOT OF DIETARY SUPPLEMENTS MARKET 68

4 PREMIUM INSIGHTS 69

4.1 ATTRACTIVE OPPORTUNITIES FOR KEY PLAYERS IN DIETARY SUPPLEMENTS MARKET 69

FIGURE 20 EMERGING DEMAND FOR PERSONALIZED NUTRITION TO PRESENT OPPORTUNITIES FOR MARKET GROWTH 69

4.2 GLOBAL DIETARY SUPPLEMENTS MARKET: GROWTH RATES OF MAJOR REGIONAL SUBMARKETS 70

FIGURE 21 INDIA TO BE FASTEST-GROWING MARKET FOR DIETARY SUPPLEMENTS DURING FORECAST PERIOD 70

4.3 ASIA PACIFIC: DIETARY SUPPLEMENTS MARKET, BY TYPE & KEY COUNTRY 71

FIGURE 22 VITAMINS TO ACCOUNT FOR LARGEST SHARE IN ASIA PACIFIC DIETARY SUPPLEMENTS MARKET 71

4.4 GLOBAL DIETARY SUPPLEMENTS MARKET, BY MODE OF APPLICATION & REGION 72

FIGURE 23 ASIA PACIFIC AND TABLETS SEGMENT PROJECTED TO DOMINATE MARKET 72

4.5 GLOBAL DIETARY SUPPLEMENTS MARKET, BY TYPE 73

FIGURE 24 VITAMINS PROJECTED TO DOMINATE DURING FORECAST PERIOD 73

4.6 GLOBAL DIETARY SUPPLEMENTS MARKET, BY FUNCTION 73

FIGURE 25 ADDITIONAL SUPPLEMENTS SEGMENT PROJECTED TO DOMINATE DIETARY SUPPLEMENTS MARKET 73

4.7 GLOBAL DIETARY SUPPLEMENTS MARKET, BY TARGET CONSUMER 74

FIGURE 26 ADULTS PROJECTED TO DOMINATE DIETARY SUPPLEMENTS MARKET 74

4.8 GLOBAL DIETARY SUPPLEMENTS MARKET, BY DISTRIBUTION CHANNEL 74

FIGURE 27 ONLINE SEGMENT PROJECTED TO DOMINATE DIETARY SUPPLEMENTS MARKET 74

5 MARKET OVERVIEW 75

5.1 INTRODUCTION 75

5.2 MACROECONOMIC FACTORS 75

5.2.1 RISING PREVALENCE OF CHRONIC DISEASES 75

FIGURE 28 CHRONIC DISEASES: TOP CAUSES OF DEATH WORLDWIDE AMONG ALL AGES IN 2019 76

FIGURE 29 AVERAGE DAILY DEATHS IN US DUE TO DIFFERENT DISEASES, 2020 76

5.3 MARKET DYNAMICS 78

FIGURE 30 MARKET DYNAMICS: DIETARY SUPPLEMENTS MARKET 78

5.3.1 DRIVERS 78

5.3.1.1 Shift in consumer preferences due to increasing focus on health 78

5.3.1.2 Rising healthcare burden due to chronic ailments 79

FIGURE 31 HEALTH EXPENDITURE, BY CATEGORY AND SOURCE OF FUNDS IN USD TRILLION 79

5.3.1.3 Rising geriatric population and their growing use of dietary supplements 80

FIGURE 32 AGING POPULATION IN JAPAN, 2014-2020 80

FIGURE 33 PERCENTAGE OF US ADULTS TAKING DIETARY SUPPLEMENTS, 2018 81

5.3.1.4 Growing retail sales of functional foods 81

FIGURE 34 RETAIL SALES OF FUNCTIONAL AND FORTIFIED FOOD PRODUCTS IN AUSTRALIA, 2018-2022 (USD MILLION) 82

5.3.2 RESTRAINTS 82

5.3.2.1 High cost of dietary supplements 82

5.3.2.2 High R&D investments and cost of clinical trials 83

5.3.3 OPPORTUNITIES 83

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.3.3.1	Shift toward plant-based supplements	83
FIGURE 35	PLANT-BASED FOODS SALES (USD BILLION)	84
5.3.3.2	Consumer awareness about micronutrient deficiencies	84
TABLE 3	FOODS BOOSTING IMMUNE SYSTEM	85
TABLE 4	MICRONUTRIENT DEFICIENCY CONDITIONS AND WORLDWIDE PREVALENCE	85
5.3.3.3	Government mandates related to food fortification	86
TABLE 5	WIDELY USED FORTIFIED FOODS	86
5.3.4	CHALLENGES	87
5.3.4.1	Consumer skepticism and fake supplements associated with nutraceutical products	87
5.3.4.2	Challenging regulatory environment	88
?		
6	INDUSTRY TRENDS	89
6.1	INTRODUCTION	89
6.2	TRENDS IMPACTING CUSTOMERS' BUSINESSES	89
FIGURE 36	REVENUE SHIFT FOR DIETARY SUPPLEMENTS MARKET	89
6.3	PRICING ANALYSIS	90
6.3.1	AVERAGE SELLING PRICE TREND ANALYSIS	90
TABLE 6	DIETARY SUPPLEMENTS MARKET: AVERAGE SELLING PRICE FOR BOTANICALS, BY REGION, 2020-2022 (USD/TON)	90
TABLE 7	DIETARY SUPPLEMENTS MARKET: AVERAGE SELLING PRICE FOR VITAMINS, BY REGION, 2020-2022 (USD/TON)	91
TABLE 8	DIETARY SUPPLEMENTS MARKET: AVERAGE SELLING PRICE FOR MINERALS, BY REGION, 2020-2022 (USD/TON)	91
TABLE 9	DIETARY SUPPLEMENTS MARKET: AVERAGE SELLING PRICE FOR AMINO ACIDS, BY REGION, 2020-2022 (USD/TON)	91
TABLE 10	DIETARY SUPPLEMENTS MARKET: AVERAGE SELLING PRICE FOR ENZYMES, BY REGION, 2020-2022 (USD/TON)	92
TABLE 11	DIETARY SUPPLEMENTS MARKET: AVERAGE SELLING PRICE FOR PROBIOTICS, BY REGION, 2020-2022 (USD/TON)	92
TABLE 12	DIETARY SUPPLEMENTS MARKET: AVERAGE SELLING PRICE FOR OTHER DIETARY SUPPLEMENTS, BY REGION, 2020-2022 (USD/TON)	92
6.4	VALUE CHAIN	93
6.4.1	RESEARCH & DEVELOPMENT	93
6.4.2	SOURCING	93
6.4.3	MANUFACTURING	93
6.4.4	PACKAGING AND STORAGE	94
6.4.5	DISTRIBUTION	94
6.4.6	END USERS	94
FIGURE 37	VALUE CHAIN ANALYSIS OF DIETARY SUPPLEMENTS MARKET	94
6.5	MARKET MAPPING AND ECOSYSTEM OF DIETARY SUPPLEMENTS	94
6.5.1	DEMAND SIDE	94
6.5.2	SUPPLY SIDE	95
FIGURE 38	DIETARY SUPPLEMENTS MARKET MAP	95
6.5.2.1	Technology providers	96
6.5.2.2	Ingredient and raw material providers	96
6.5.2.3	Regulatory bodies & certification providers	96
TABLE 13	DIETARY SUPPLEMENTS MARKET: SUPPLY CHAIN (ECOSYSTEM)	97
6.6	TRADE DATA: DIETARY SUPPLEMENTS MARKET	98
TABLE 14	IMPORTER AND EXPORTER OF VITAMINS, BY COUNTRY, 2021 (TONS)	98
TABLE 15	TOP 10 IMPORTERS AND EXPORTERS OF LACTOBACILLUS (PROBIOTICS), 2021 (KG)	98
6.7	PORTER'S FIVE FORCES ANALYSIS	99
TABLE 16	DIETARY SUPPLEMENTS MARKET: PORTER'S FIVE FORCES ANALYSIS	99
6.7.1	INTENSITY OF COMPETITIVE RIVALRY	99

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.7.2	BARGAINING POWER OF SUPPLIERS	100
6.7.3	BARGAINING POWER OF BUYERS	100
6.7.4	THREAT OF SUBSTITUTES	100
6.7.5	THREAT OF NEW ENTRANTS	101
6.8	TECHNOLOGY ANALYSIS	101
6.8.1	FOOD MICROENCAPSULATION	101
6.8.1.1	Encapsulation of omega-3 to mask odor	102
6.8.2	BIOTECHNOLOGY	102
6.8.3	INNOVATIVE AND DISRUPTIVE TECHNOLOGIES	102
6.8.3.1	Robotics to be key technological trend leading to innovations	102
6.8.3.2	3D printing of dietary supplements	103
6.9	PATENT ANALYSIS	103
FIGURE 39	NUMBER OF PATENTS GRANTED BETWEEN 2013 AND 2023	104
TABLE 17	PATENTS PERTAINING TO DIETARY SUPPLEMENTS, 2020-2023	105
6.10	KEY CONFERENCES & EVENTS IN 2022-2023	111
TABLE 18	KEY CONFERENCES & EVENTS RELATED TO DIETARY SUPPLEMENTS, 2023-2024	111
6.11	TARIFF AND REGULATORY LANDSCAPE	112
6.11.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	112
TABLE 19	NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	112
TABLE 20	EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	114
TABLE 21	ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	115
TABLE 22	REST OF THE WORLD: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	115
6.12	GLOBAL REGULATION OF HERBALS AND DIETARY SUPPLEMENTS	116
6.12.1	US	116
6.12.1.1	Longevity of tablet form to drive market growth	116
6.12.1.1.1	Dietary supplements	116
6.12.1.1.2	Functional beverages	117
6.12.1.1.3	FDA Dietary Supplements - Specific Requirements and Guidance	117
6.12.1.1.4	New dietary ingredients	117
6.12.1.1.5	Current good manufacturing practices	117
6.12.1.1.6	Botanicals	118
6.12.1.1.7	Probiotics	118
6.12.1.1.8	Path for approval of herbal products by FDA	118
6.12.1.1.9	Manufacturing dietary supplements	118
6.12.1.1.10	Global Standards for Evaluation of Probiotics	119
6.12.1.1.11	Regulation of probiotics as dietary supplements	119
?		
TABLE 23	RDI FOR VITAMINS AND MINERALS ESSENTIAL IN HUMAN NUTRITION	120
6.12.2	CANADA	121
6.12.2.1	Dietary supplements	121
6.12.2.1.1	Regulatory compliance	121
6.12.2.1.2	Licensing requirement	121
6.12.2.1.3	Product licensing	121
6.12.2.1.4	Site licensing	122
6.12.2.1.5	Natural and Non-prescription Health Products Directorate (NNHPD)	122
6.12.2.1.6	Marketed Health Products Directorate (MHPD)	122

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.12.2.1.7	Health Products and Food Branch Inspectorate (HPFBI)	122
6.12.2.1.8	Content and composition of natural health products in Canada	122
6.12.2.1.8.1	Vitamin and minerals	122
6.12.2.1.9	Probiotics	123
6.12.2.1.10	Nutritional supplements	123
TABLE 24	DIETARY REFERENCE INTAKES	123
6.12.3	MEXICO	126
6.12.3.1	Dietary supplements & functional foods	126
TABLE 25	RECOMMENDED VITAMIN LEVELS	127
TABLE 26	QUANTITY OF MINERALS AND THEIR LIMITS	128
6.12.4	GERMANY	128
6.12.4.1	Dietary supplements	128
TABLE 27	RECOMMENDED MAXIMUM LEVELS FOR ADDITION OF VITAMINS TO FOOD SUPPLEMENTS AND CONVENTIONAL FOODS	129
TABLE 28	RECOMMENDED MAXIMUM LEVELS FOR ADDITION OF MINERALS AND TRACE ELEMENTS TO FOOD SUPPLEMENTS AND CONVENTIONAL FOODS	131
6.12.5	UK	133
6.12.5.1	Dietary supplements	133
6.12.5.2	Herbal products	134
TABLE 29	DAILY REFERENCE INTAKES FOR VITAMIN AND MINERALS	135
6.12.6	FRANCE	136
6.12.6.1	Dietary supplements	136
TABLE 30	VITAMINS: MAXIMUM DAILY USE	136
TABLE 31	MINERALS: MAXIMUM DAILY USE	137
6.12.6.2	Botanicals	137
6.12.7	SPAIN	138
6.12.7.1	Dietary supplements	138
6.12.7.2	Botanicals	138
6.12.8	CHINA	139
6.12.8.1	Functional foods	139
TABLE 32	CATEGORIES WITH REGARD TO FUNCTIONAL FOODS AND LEGISLATIVE CRITERIA OF HEALTH CLAIMS	139
6.12.8.2	Dietary supplements	140
6.12.8.3	Relevant regulation on health food	140
6.12.9	INDIA	141
6.12.9.1	Dietary supplements	141
TABLE 33	DIFFERENT CATEGORIES OF PRODUCTS COVERED UNDER NUTRACEUTICAL REGULATIONS	142
TABLE 34	VALUES FOR VITAMINS ALLOWED TO BE USED IN FOOD FOR SPECIAL DIETARY USE AND SPECIAL MEDICAL PURPOSE (OTHER THAN THOSE INTENDED FOR USE IN INFANT FORMULA)	145
TABLE 35	VALUES FOR MINERALS AND TRACE ELEMENTS ALLOWED TO BE USED IN FOOD FOR SPECIAL DIETARY USE AND SPECIAL MEDICAL PURPOSE (OTHER THAN THOSE INTENDED FOR USE IN INFANT FORMULA)	146
6.12.10	JAPAN	146
6.12.10.1	Dietary supplements	146
6.12.11	AUSTRALIA & NEW ZEALAND	147
6.12.11.1	Dietary supplements	147
6.12.11.2	Vitamins and minerals	149
TABLE 36	VITAMINS	149
TABLE 37	MINERALS	149
6.12.12	BRAZIL	149

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.12.12.1	Dietary supplements	149
6.12.12.2	Nutrients, bioactive substances, and enzymes	150
6.12.12.3	Probiotics	150
6.12.12.4	Herbal medicines	151
6.12.13	ARGENTINA	151
6.12.13.1	Functional foods	151
TABLE 38 RECOMMENDED DAILY INTAKE VALUES OF NUTRIENTS (IDR) OF VOLUNTARY DECLARATION: VITAMINS AND MINERALS		151
6.12.13.2	Dietary supplements	152
6.12.13.3	Vitamins and minerals	153
6.12.13.4	Herbal substances	153
6.12.14	COLOMBIA	153
6.12.14.1	Dietary supplements	153
6.12.14.2	Vitamins and minerals	154
6.12.14.3	Herbal substances	154
6.12.14.4	Other substances	154
TABLE 39 DAILY REFERENCE VALUES AND TOLERABLE MAXIMUM INTAKE LEVEL OF VITAMINS, MINERALS, AND TRACE ELEMENTS FOR DIETARY SUPPLEMENTS		154
6.12.15	AFRICA	156
6.12.15.1	Functional foods	156
6.12.15.2	Dietary supplements	156
6.12.15.3	Registrations in South Africa	157
6.12.15.4	Composition of supplements in South Africa	157
6.12.16	MIDDLE EAST	158
6.12.16.1	Dietary supplements	158
TABLE 40 VITAMINS: RECOMMENDED DIETARY ALLOWANCE (RDA) AND ADEQUATE INTAKE (AI) (FOOD DOME DIETARY GUIDELINES OF ARAB COUNTRIES - ARAB CENTRE FOR NUTRITION - KINGDOM OF BAHRAIN)		159
TABLE 41 MINERALS: RECOMMENDED DIETARY ALLOWANCE (RDA) AND ADEQUATE INTAKE (AI) (FOOD DOME DIETARY GUIDELINES OF ARAB COUNTRIES - ARAB CENTRE FOR NUTRITION - KINGDOM OF BAHRAIN)		161
6.13	KEY STAKEHOLDERS AND BUYING CRITERIA	162
6.13.1	KEY STAKEHOLDERS AND BUYING CRITERIA	163
FIGURE 40 INFLUENCE OF STAKEHOLDERS ON BUYING DIETARY SUPPLEMENTS FOR DIFFERENT END-USE APPLICATIONS		163
6.13.2	BUYING CRITERIA	163
FIGURE 41 KEY BUYING CRITERIA FOR TOP MODES OF APPLICATION		163
TABLE 42 KEY BUYING CRITERIA FOR KEY MODES OF APPLICATION		164
6.14	CASE STUDIES	164
TABLE 43 CASE STUDY: SAFETY ASSESSMENT AND CERTIFICATION DEMAND BY INDUSTRY PLAYERS TO ENSURE TRANSPARENCY		164
TABLE 44 CASE STUDY: COMPANIES FOCUSED ON DEVELOPING FLAVORED DIETARY SUPPLEMENT PRODUCTS		164
TABLE 45 CASE STUDY: US-BASED FIRM STARTED OFFERING EASY-TO-USE AND EFFICIENT-TO-TAKE VITAMIN AND MINERAL PILLS THAT DISSOLVE INSTANTLY		165
7	DIETARY SUPPLEMENTS MARKET, BY TYPE	166
7.1	INTRODUCTION	167
FIGURE 42 DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023 VS. 2028 (USD MILLION)		167
TABLE 46 DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (USD MILLION)		168
TABLE 47 DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (USD MILLION)		168
TABLE 48 DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (KT)		169
TABLE 49 DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (KT)		169

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

7.2 BOTANICALS 169

7.2.1 RISING DEMAND FOR PLANT-BASED FOOD PRODUCTS TO PROPEL MARKET GROWTH 169

TABLE 50 BOTANICAL SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION) 171

TABLE 51 BOTANICAL SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION) 171

TABLE 52 BOTANICAL SUPPLEMENTS MARKET, BY REGION, 2018-2022 (KT) 172

TABLE 53 BOTANICAL SUPPLEMENTS MARKET, BY REGION, 2023-2028 (KT) 172

7.3 VITAMINS 172

7.3.1 DEFICIENCY OF VITAMINS TO BE KEY FACTOR DRIVING THEIR USAGE 172

TABLE 54 VITAMIN SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION) 174

TABLE 55 VITAMIN SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION) 174

TABLE 56 VITAMIN SUPPLEMENTS MARKET, BY REGION, 2018-2022 (KT) 175

TABLE 57 VITAMIN SUPPLEMENTS MARKET, BY REGION, 2023-2028 (KT) 175

?

7.4 MINERALS 175

7.4.1 RISING AWARENESS ABOUT IMPORTANCE OF MINERALS TO SUPPORT MARKET GROWTH 175

TABLE 58 MINERALS: USAGE AND SOURCES 176

TABLE 59 TRACE ELEMENTS (MINERALS): USAGE AND SOURCES 177

TABLE 60 MINERAL SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION) 178

TABLE 61 MINERAL SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION) 178

TABLE 62 MINERAL SUPPLEMENTS MARKET, BY REGION, 2018-2022 (KT) 178

TABLE 63 MINERAL SUPPLEMENTS MARKET, BY REGION, 2023-2028 (KT) 179

7.5 AMINO ACIDS 179

7.5.1 NEED TO IMPROVE METABOLIC HEALTH TO TRIGGER DEMAND FOR AMINO ACIDS 179

TABLE 64 AMINO ACID SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION) 181

TABLE 65 AMINO ACID SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION) 181

TABLE 66 AMINO ACID SUPPLEMENTS MARKET, BY REGION, 2018-2022 (KT) 181

TABLE 67 AMINO ACID SUPPLEMENTS MARKET, BY REGION, 2023-2028 (KT) 182

7.6 ENZYMES 182

7.6.1 IMPORTANCE OF ENZYMES IN ALL METABOLIC PROCESSES TO DRIVE DEMAND 182

TABLE 68 ENZYME SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION) 184

TABLE 69 ENZYME SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION) 184

TABLE 70 ENZYME SUPPLEMENTS MARKET, BY REGION, 2018-2022 (KT) 184

TABLE 71 ENZYME SUPPLEMENTS MARKET, BY REGION, 2023-2028 (KT) 185

7.7 PROBIOTICS 185

7.7.1 SURGE IN DEMAND FOR FORTIFIED FOOD PRODUCTS TO DRIVE GROWTH OF PROBIOTICS SEGMENT 185

TABLE 72 PROBIOTIC SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION) 186

TABLE 73 PROBIOTIC SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION) 187

TABLE 74 PROBIOTIC SUPPLEMENTS MARKET, BY REGION, 2018-2022 (KT) 187

TABLE 75 PROBIOTIC SUPPLEMENTS MARKET, BY REGION, 2023-2028 (KT) 187

7.8 OTHER TYPES 188

TABLE 76 OTHER TYPES: DIETARY SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION) 189

TABLE 77 OTHER TYPES: DIETARY SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION) 189

TABLE 78 OTHER TYPES: DIETARY SUPPLEMENTS MARKET, BY REGION, 2018-2022 (KT) 189

TABLE 79 OTHER TYPES: DIETARY SUPPLEMENTS MARKET, BY REGION, 2023-2028 (KT) 190

?

8 DIETARY SUPPLEMENTS MARKET, BY FUNCTION 191

8.1 INTRODUCTION 192

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

FIGURE 43	DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023 VS. 2028 (USD MILLION)	192
TABLE 80	DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2018-2022 (USD MILLION)	193
TABLE 81	DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023-2028 (USD MILLION)	193
8.2	ADDITIONAL SUPPLEMENTS	193
8.2.1	RIISING NUMBER OF HEALTH-CONSCIOUS CONSUMERS TO DRIVE DEMAND FOR ADDITIONAL SUPPLEMENTS	193
TABLE 82	ADDITIONAL DIETARY SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION)	194
TABLE 83	ADDITIONAL DIETARY SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION)	194
8.3	MEDICAL SUPPLEMENTS	194
8.3.1	GROWING AGING POPULATION TO BE IMPORTANT DEMOGRAPHIC FOR MEDICAL SUPPLEMENTS	194
TABLE 84	MEDICAL SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION)	195
TABLE 85	MEDICAL SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION)	195
8.4	SPORTS NUTRITION SUPPLEMENTS	195
8.4.1	INCREASED NUTRIENT REQUIREMENTS DUE TO DEMANDING PHYSICAL ACTIVITIES TO DRIVE GROWTH OF SPORTS NUTRITION SUPPLEMENTS	195
TABLE 86	SPORTS NUTRITION SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION)	196
TABLE 87	SPORTS NUTRITION SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION)	197
9	DIETARY SUPPLEMENTS MARKET, BY MODE OF APPLICATION	198
9.1	INTRODUCTION	199
FIGURE 44	DIETARY SUPPLEMENTS MARKET, BY MODE OF APPLICATION, 2023 VS. 2028 (USD MILLION)	199
TABLE 88	DIETARY SUPPLEMENTS MARKET, BY MODE OF APPLICATION, 2018-2022 (USD MILLION)	200
TABLE 89	DIETARY SUPPLEMENTS MARKET, BY MODE OF APPLICATION, 2023-2028 (USD MILLION)	200
9.2	TABLETS	200
9.2.1	LONGEVITY OF TABLET FORM TO DRIVE MARKET GROWTH	200
TABLE 90	TABLETS: DIETARY SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION)	201
TABLE 91	TABLETS: DIETARY SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION)	202
9.3	CAPSULES	202
9.3.1	EASE OF SWALLOWING AND VERSATILE FORMULATION OF CAPSULES TO DRIVE THEIR DEMAND	202
TABLE 92	CAPSULES: DIETARY SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION)	203
TABLE 93	CAPSULES: DIETARY SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION)	203
9.4	LIQUID	203
9.4.1	ENHANCED ABSORPTION AND BIOAVAILABILITY TO DRIVE DEMAND FOR LIQUID DIETARY SUPPLEMENTS	203
TABLE 94	LIQUID: DIETARY SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION)	204
TABLE 95	LIQUID: DIETARY SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION)	205
9.5	POWDER	205
9.5.1	EASY RELEASE OF ACTIVE INGREDIENTS TO DRIVE USAGE OF POWDER FORM	205
TABLE 96	POWDER: DIETARY SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION)	206
TABLE 97	POWDER: DIETARY SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION)	206
9.6	SOFTGELS	207
9.6.1	RELATIVELY LOW COST OF SOFTGELS TO DRIVE MARKET GROWTH	207
TABLE 98	SOFTGELS: DIETARY SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION)	208
TABLE 99	SOFTGELS: DIETARY SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION)	208
9.7	GEL CAPS	208
9.7.1	CONSUMER PREFERENCES FOR EASY SWALLOWING AND POTENT NUTRIENT DELIVERY TO DRIVE DEMAND FOR GEL CAPS	208
TABLE 100	GEL CAPS: DIETARY SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION)	209
TABLE 101	GEL CAPS: DIETARY SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION)	209
10	DIETARY SUPPLEMENTS MARKET, BY TARGET CONSUMER	210
10.1	INTRODUCTION	211

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

FIGURE 45	DIETARY SUPPLEMENTS MARKET, BY TARGET CONSUMER, 2023 VS. 2028 (USD MILLION)	212
TABLE 102	DIETARY SUPPLEMENTS MARKET, BY TARGET CONSUMER, 2018-2022 (USD MILLION)	212
TABLE 103	DIETARY SUPPLEMENTS MARKET, BY TARGET CONSUMER, 2023-2028 (USD MILLION)	213
10.2	INFANTS	213
10.2.1	ESSENTIAL NUTRIENTS REQUIRED FOR INFANT NUTRITION TO TRIGGER DEMAND FOR DIETARY SUPPLEMENTS	213
TABLE 104	INFANTS: DIETARY SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION)	214
TABLE 105	INFANTS: DIETARY SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION)	214
10.3	CHILDREN	214
10.3.1	ENHANCING COGNITIVE HEALTH AND IMMUNITY TO PROPEL DEMAND FOR DIETARY SUPPLEMENTS AMONG CHILDREN	214
TABLE 106	CHILDREN: DIETARY SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION)	215
TABLE 107	CHILDREN: DIETARY SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION)	215
10.4	ADULTS	216
10.4.1	ADDRESSING NUTRITIONAL DEFICIENCIES TO DRIVE DEMAND FOR DIETARY SUPPLEMENTS AMONG ADULTS	216
TABLE 108	ADULTS: DIETARY SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION)	216
TABLE 109	ADULTS: DIETARY SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION)	217
10.5	PREGNANT WOMEN	217
10.5.1	OPTIMIZING MATERNAL AND FETAL HEALTH TO LEAD TO RISING DEMAND FOR DIETARY SUPPLEMENTS DURING PREGNANCY	217
TABLE 110	PREGNANT WOMEN: DIETARY SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION)	218
TABLE 111	PREGNANT WOMEN: DIETARY SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION)	218
10.6	ELDERLY	218
10.6.1	CONSUMPTION OF DIETARY SUPPLEMENTS BY ELDERLY TO SUPPORT NUTRITIONAL NEEDS AND ENSURE OPTIMAL HEALTH OUTCOME	218
TABLE 112	ELDERLY: DIETARY SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION)	219
TABLE 113	ELDERLY: DIETARY SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION)	219
11	DIETARY SUPPLEMENTS MARKET, BY DISTRIBUTION CHANNEL	220
11.1	INTRODUCTION	221
FIGURE 46	DIETARY SUPPLEMENTS MARKET, BY DISTRIBUTION CHANNEL, 2023 VS. 2028 (USD MILLION)	222
TABLE 114	DIETARY SUPPLEMENTS MARKET, BY DISTRIBUTION CHANNEL, 2018-2022 (USD MILLION)	222
TABLE 115	DIETARY SUPPLEMENTS MARKET, BY DISTRIBUTION CHANNEL, 2023-2028 (USD MILLION)	222
11.2	PHARMACY	223
11.2.1	TRUSTED ADVICE AND CONVENIENT ACCESS TO DRIVE DEMAND FOR DIETARY SUPPLEMENTS IN PHARMACIES	223
11.3	SUPERMARKET/HYPERMARKET	224
11.3.1	ACCESSIBILITY AND CONVENIENCE TO FUEL GROWTH OF DIETARY SUPPLEMENTS MARKET THROUGH HYPERMARKETS AND SUPERMARKETS	224
11.4	ONLINE	225
11.4.1	GROWTH OF E-COMMERCE TO FUEL DEMAND FOR DIETARY SUPPLEMENTS DUE TO COST-EFFECTIVE OPERATIONS AND EXPANDED MARKET REACH	225
?		
12	DIETARY SUPPLEMENTS MARKET, BY REGION	226
12.1	INTRODUCTION	227
FIGURE 47	INDIA TO REGISTER HIGHEST CAGR IN GLOBAL DIETARY SUPPLEMENTS MARKET FROM 2023 TO 2028	228
TABLE 116	DIETARY SUPPLEMENTS MARKET, BY REGION, 2018-2022 (USD MILLION)	228
TABLE 117	DIETARY SUPPLEMENTS MARKET, BY REGION, 2023-2028 (USD MILLION)	229
TABLE 118	DIETARY SUPPLEMENTS MARKET, BY REGION, 2018-2022 (KT)	229
TABLE 119	DIETARY SUPPLEMENTS MARKET, BY REGION, 2023-2028 (KT)	229
12.2	NORTH AMERICA	230

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

FIGURE 48 NORTH AMERICA: DIETARY SUPPLEMENTS MARKET SNAPSHOT 231

12.2.1 NORTH AMERICA: RECESSION IMPACT 231

FIGURE 49 NORTH AMERICA: DIETARY SUPPLEMENT MARKET: RECESSION IMPACT ANALYSIS 232

TABLE 120 NORTH AMERICA: DIETARY SUPPLEMENTS MARKET, BY COUNTRY, 2018-2022 (USD MILLION) 233

TABLE 121 NORTH AMERICA: DIETARY SUPPLEMENTS MARKET, BY COUNTRY, 2023-2028 (USD MILLION) 233

TABLE 122 NORTH AMERICA: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (USD MILLION) 233

TABLE 123 NORTH AMERICA: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (USD MILLION) 234

TABLE 124 NORTH AMERICA: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (KT) 234

TABLE 125 NORTH AMERICA: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (KT) 235

TABLE 126 NORTH AMERICA: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2018-2022 (USD MILLION) 235

TABLE 127 NORTH AMERICA: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023-2028 (USD MILLION) 235

TABLE 128 NORTH AMERICA: DIETARY SUPPLEMENTS MARKET, BY MODE OF APPLICATION, 2018-2022 (USD MILLION) 236

TABLE 129 NORTH AMERICA: DIETARY SUPPLEMENTS MARKET, BY MODE OF APPLICATION, 2023-2028 (USD MILLION) 236

TABLE 130 NORTH AMERICA: DIETARY SUPPLEMENTS MARKET, BY TARGET CONSUMER, 2018-2022 (USD MILLION) 236

TABLE 131 NORTH AMERICA: DIETARY SUPPLEMENTS MARKET, BY TARGET CONSUMER, 2023-2028 (USD MILLION) 237

12.2.2 US 237

12.2.2.1 US to be largest market for dietary supplements in North America 237

FIGURE 50 US: MOST POPULAR SUPPLEMENTS AMONG ADULTS 238

TABLE 132 US: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (USD MILLION) 238

TABLE 133 US: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (USD MILLION) 239

TABLE 134 US: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2018-2022 (USD MILLION) 239

TABLE 135 US: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023-2028 (USD MILLION) 239

12.2.3 CANADA 240

12.2.3.1 Rise in prevalence of chronic diseases to fuel demand for dietary supplements in Canada 240

TABLE 136 CANADA: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (USD MILLION) 240

TABLE 137 CANADA: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (USD MILLION) 241

TABLE 138 CANADA: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2018-2022 (USD MILLION) 241

TABLE 139 CANADA: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023-2028 (USD MILLION) 241

12.2.4 MEXICO 242

12.2.4.1 Malnutrition and obesity to trigger demand for dietary supplements 242

TABLE 140 MEXICO: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (USD MILLION) 243

TABLE 141 MEXICO: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (USD MILLION) 243

TABLE 142 MEXICO: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2018-2022 (USD MILLION) 243

TABLE 143 MEXICO: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023-2028 (USD MILLION) 244

12.3 EUROPE 244

12.3.1 EUROPE: RECESSION IMPACT 245

TABLE 144 EUROPE: DIETARY SUPPLEMENTS MARKET, BY COUNTRY, 2018-2022 (USD MILLION) 246

TABLE 145 EUROPE: DIETARY SUPPLEMENTS MARKET, BY COUNTRY, 2023-2028 (USD MILLION) 246

TABLE 146 EUROPE: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (USD MILLION) 246

TABLE 147 EUROPE: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (USD MILLION) 247

TABLE 148 EUROPE: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (KT) 247

TABLE 149 EUROPE: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (KT) 247

TABLE 150 EUROPE: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2018-2022 (USD MILLION) 248

TABLE 151 EUROPE: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023-2028 (USD MILLION) 248

TABLE 152 EUROPE: DIETARY SUPPLEMENTS MARKET, BY MODE OF APPLICATION, 2018-2022 (USD MILLION) 248

TABLE 153 EUROPE: DIETARY SUPPLEMENTS MARKET, BY MODE OF APPLICATION, 2023-2028 (USD MILLION) 249

TABLE 154 EUROPE: DIETARY SUPPLEMENTS MARKET, BY TARGET CONSUMER, 2018-2022 (USD MILLION) 249

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 155 EUROPE: DIETARY SUPPLEMENTS MARKET, BY TARGET CONSUMER, 2023-2028 (USD MILLION) 249

12.3.2 GERMANY 250

12.3.2.1 Surge in demand for plant-based food products to fuel market growth 250

TABLE 156 GERMANY: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (USD MILLION) 251

TABLE 157 GERMANY: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (USD MILLION) 251

TABLE 158 GERMANY: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2018-2022 (USD MILLION) 251

TABLE 159 GERMANY: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023-2028 (USD MILLION) 252

12.3.3 UK 252

12.3.3.1 Popularity of herbal and probiotic supplements in UK to boost demand 252

TABLE 160 UK: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (USD MILLION) 253

TABLE 161 UK: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (USD MILLION) 253

TABLE 162 UK: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2018-2022 (USD MILLION) 253

TABLE 163 UK: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023-2028 (USD MILLION) 254

12.3.4 FRANCE 254

12.3.4.1 Government support for consumption of nutritional supplements to drive demand 254

TABLE 164 FRANCE: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (USD MILLION) 255

TABLE 165 FRANCE: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (USD MILLION) 255

TABLE 166 FRANCE: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2018-2022 (USD MILLION) 256

TABLE 167 FRANCE: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023-2028 (USD MILLION) 256

12.3.5 ITALY 256

12.3.5.1 High prevalence of vitamin D deficiency to contribute to demand 256

TABLE 168 ITALY: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (USD MILLION) 257

TABLE 169 ITALY: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (USD MILLION) 258

TABLE 170 ITALY: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2018-2022 (USD MILLION) 258

TABLE 171 ITALY: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023-2028 (USD MILLION) 258

12.3.6 SPAIN 259

12.3.6.1 Consumer preference for clean-label ingredients to bolster market growth 259

TABLE 172 SPAIN: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (USD MILLION) 259

TABLE 173 SPAIN: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (USD MILLION) 260

TABLE 174 SPAIN: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2018-2022 (USD MILLION) 260

TABLE 175 SPAIN: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023-2028 (USD MILLION) 260

12.3.7 REST OF EUROPE 261

TABLE 176 REST OF EUROPE: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (USD MILLION) 261

TABLE 177 REST OF EUROPE: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (USD MILLION) 262

TABLE 178 REST OF EUROPE: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2018-2022 (USD MILLION) 262

TABLE 179 REST OF EUROPE: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023-2028 (USD MILLION) 262

12.4 ASIA PACIFIC 263

12.4.1 ASIA PACIFIC: RECESSION IMPACT 263

FIGURE 51 ASIA PACIFIC: DIETARY SUPPLEMENTS MARKET SNAPSHOT 265

TABLE 180 ASIA PACIFIC: DIETARY SUPPLEMENTS MARKET, BY COUNTRY, 2018-2022 (USD MILLION) 266

TABLE 181 ASIA PACIFIC: DIETARY SUPPLEMENTS MARKET, BY COUNTRY, 2023-2028 (USD MILLION) 266

TABLE 182 ASIA PACIFIC: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (USD MILLION) 266

TABLE 183 ASIA PACIFIC: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (USD MILLION) 267

TABLE 184 ASIA PACIFIC: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (KT) 267

TABLE 185 ASIA PACIFIC: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (KT) 268

TABLE 186 ASIA PACIFIC: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2018-2022 (USD MILLION) 268

TABLE 187 ASIA PACIFIC: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023-2028 (USD MILLION) 268

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 188	ASIA PACIFIC: DIETARY SUPPLEMENTS MARKET, BY MODE OF APPLICATION, 2018-2022 (USD MILLION)	269
TABLE 189	ASIA PACIFIC: DIETARY SUPPLEMENTS MARKET, BY MODE OF APPLICATION, 2023-2028 (USD MILLION)	269
TABLE 190	ASIA PACIFIC: DIETARY SUPPLEMENTS MARKET, BY TARGET CONSUMER, 2018-2022 (USD MILLION)	269
TABLE 191	ASIA PACIFIC: DIETARY SUPPLEMENTS MARKET, BY TARGET CONSUMER, 2023-2028 (USD MILLION)	270
12.4.2	CHINA	270
12.4.2.1	Elderly and millennial populations: Key users of dietary supplements	270
TABLE 192	CHINA: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (USD MILLION)	271
TABLE 193	CHINA: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (USD MILLION)	272
TABLE 194	CHINA: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2018-2022 (USD MILLION)	272
TABLE 195	CHINA: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023-2028 (USD MILLION)	272
12.4.3	INDIA	273
12.4.3.1	Millennial population to drive demand for dietary supplements	273
TABLE 196	INDIA: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (USD MILLION)	274
TABLE 197	INDIA: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (USD MILLION)	274
TABLE 198	INDIA: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2018-2022 (USD MILLION)	274
TABLE 199	INDIA: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023-2028 (USD MILLION)	275
12.4.4	JAPAN	275
12.4.4.1	Rise in aging population to drive demand for dietary supplements	275
TABLE 200	JAPAN: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (USD MILLION)	276
TABLE 201	JAPAN: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (USD MILLION)	276
TABLE 202	JAPAN: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2018-2022 (USD MILLION)	277
TABLE 203	JAPAN: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023-2028 (USD MILLION)	277
12.4.5	AUSTRALIA & NEW ZEALAND	277
12.4.5.1	Prevalence of chronic diseases and obesity among consumers to support demand	277
TABLE 204	AUSTRALIA & NEW ZEALAND: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (USD MILLION)	278
TABLE 205	AUSTRALIA & NEW ZEALAND: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (USD MILLION)	278
TABLE 206	AUSTRALIA & NEW ZEALAND: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2018-2022 (USD MILLION)	279
TABLE 207	AUSTRALIA & NEW ZEALAND: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023-2028 (USD MILLION)	279
12.4.6	REST OF ASIA PACIFIC	279
TABLE 208	REST OF ASIA PACIFIC: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2018-2022 (USD MILLION)	280
TABLE 209	REST OF ASIA PACIFIC: DIETARY SUPPLEMENTS MARKET, BY TYPE, 2023-2028 (USD MILLION)	281
TABLE 210	REST OF ASIA PACIFIC: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2018-2022 (USD MILLION)	281
TABLE 211	REST OF ASIA PACIFIC: DIETARY SUPPLEMENTS MARKET, BY FUNCTION, 2023-2028 (USD MILLION)	281

Dietary Supplements Market by Type (Botanicals, Vitamins, Minerals, Amino Acids, Enzymes, Probiotics), Function, Mode of Application, Target Consumer, Distribution Channel (Pharmacy, Supermarket/Hypermarket, Online) and Region - Global Forecast to 2028

Market Report | 2023-06-05 | 442 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code*

Country*

Date

Signature