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**Global Supplement  
Business Report  
2016**



# The 2016 Global Report

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# 1. EXECUTIVE OVERVIEW





## 1.1. Executive Summary: One world, many maps

It is often said that the world is a big place that keeps getting smaller. High speed internet connections ubiquitous to the West now bring broadband connection into the most remote of Third World villages. Shipping is faster and more efficient. Trade barriers fall. Supply chains cross oceans, time zones and multiple borders in days instead of months.

And yet, for supplements, the world isn't just getting smaller. It's getting more complicated.

Some of this is driven by transparency. As customers demand to know more about where the ingredients in their products come from, finished product companies are forced to push that expectation up the supply chain. In the global ingredients trade that's not always easy; a factor that inspires established companies to become more and more vertical, leap-frogging vendors to forge new relationships all the way down to the farm-and-field level. Or it could mean arrangements with vendors that are drawn up by the decade, rather than the deal.

Competing sets of expectations and regulations, that vary by border, wind the intricacies even tighter. Harmonization happens in fits and starts, but a dozen countries can still require a dozen labels. Read our report to learn where neighboring countries are finding common cause around nutrition regulation.

And where they're not.

You don't just need a roadmap to navigate the global supplement trade. You need a stack of roadmaps, and different person to read the fine print on each.

We offer the 2016 NBJ Global Supplement Business Report as the must have roadmap.

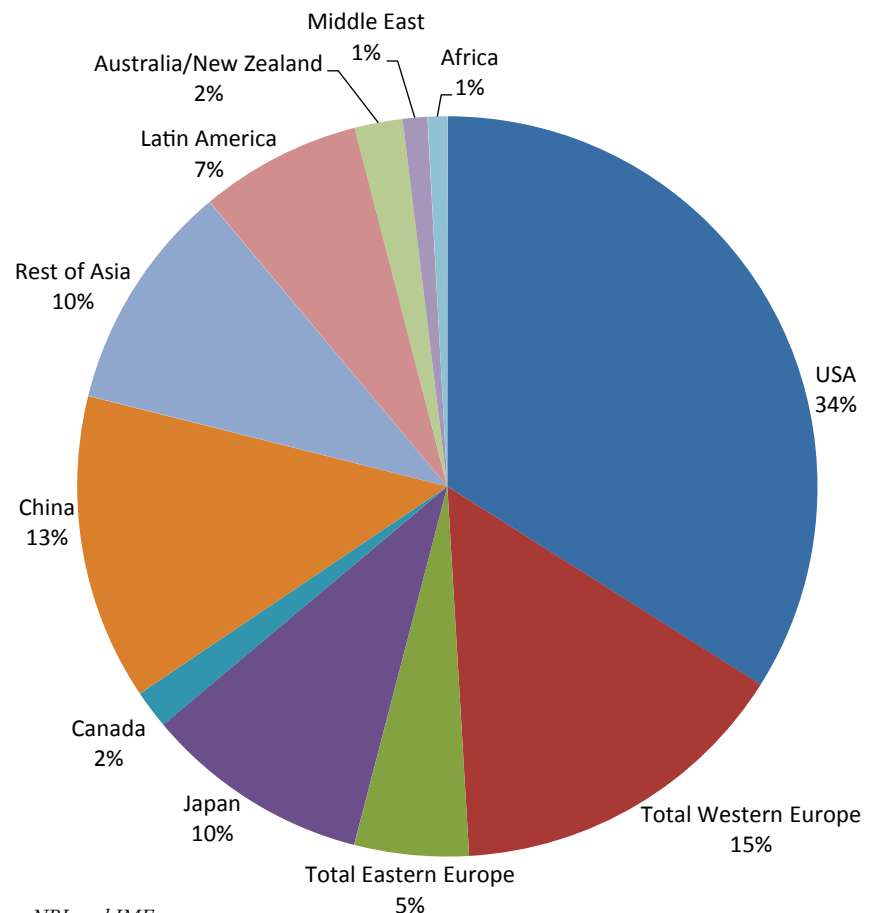
In this year's report, we provide insight and data on a country-by-country and region-by-region basis. Pore over more than 100 charts to compare sales and growth in one region against product market share in multiple markets. Find out what the insiders say about regulation change in Japan or how opportunity meshes with culture in Middle Eastern markets.

The international supplement trade remains a game of must-know market dynamics. The headlines say the American middle class is disappearing, but in country after country around the world, consumers are emerging into new middle classes. From that view, is there a market you're missing? Is there a market you can afford to ignore? The 2016 NBJ Global Supplement Business Report dives into those dynamics with data and analysis on relationships between supplement consumer penetration and a nation's rate of GDP growth.

As the level of complexity rises, driven by consumers and regulators, we continue to improve the NBJ report experience to match that rising demand for actionable information. Opportunities are sprouting around the world, where traditional medicine provides an opening for supplement companies to step in.

The world may be getting smaller, but the NBJ Global Supplement Business Report reveals that the growth of the international supplement trade may be just getting started. 🍋

**\$108 Billion Supplement Industry by Country or Region in 2014**



Source: NBJ and IMF

**Asia is the up and coming supplement powerhouse, and its combined market share of 33% (China, Japan and Rest of Asia) is now on par with the United States. This was sluggish growth compared to the compound annual growth rate of 4.4% posted from 2004-2014.**