Vitamins and Dietary Supplements

July 2011

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VITAMINS AND DIETARY SUPPLEMENTS IN SWEDEN - CATEGORY ANALYSIS

HEADLINES

- Current value sales reach SEK2.25 billion in 2010, an increase of 7%
- Innovation remains a key driver of category growth
- Probiotic supplements records the fastest current value growth at 67%
- Midsona AB is the leading global brand owner with a 2010 current value share of 18%
- Vitamins and dietary supplements in Sweden is expected to reach constant value sales of SEK2.6 billion in 2015, which represents an overall increase of 16%

TRENDS

- Innovation is a key driver of Swedish vitamins and dietary supplements. Innovation is particularly evident in the format/packaging and marketing of products. Examples of innovations within format/packaging are sticks, sprays and so-called day-packs. A day-pack contains the daily vitamin and dietary supplement needs of consumers. Friggs Multiman Optimal and Friggs Multikvinna Opitmal are brand examples of day-packs. These two products are also examples of another important trend shaping category sales; namely the segmentation of products for men, women, the elderly and children.
- Current value growth in 2010 was faster than the review period CAGR of 5%. Consumer health awareness is at an all time high which is encouraging the strong growth rates of Swedish vitamins and dietary supplements. Innovations and new product developments are also facilitating this growth by helping to broaden the appeal of the category.
- Growth in 2010 was also driven by increased consumer reach and penetration. De-regulation of chemists/pharmacies increased the availability of vitamins and dietary supplements.
- Probiotic supplements records the fastest current value growth at 67%. Growth was driven by the increased availability of probiotic supplements on the market and strong consumer demand for said products.
- New delivery formats in 2010 included chewable capsules/tablets with the launch of Pharbio Omega-3 Cassis. The launch has proven to be successful and led to increased sales for this brand in 2010.
- The de-regulation of chemists/pharmacies is encouraging this channel to re-evaluate its product portfolio to become more competitive in the new retailing environment. To this end, chemists/pharmacies is increasingly stocking vitamins and dietary supplements.

VITAMINS

- The consumer "experience" drives sales in vitamin sales. As part of this, consumers demand information on the product, its health benefits and how it works. For this reason, companies are becoming more active in enhancing their product lines and offering more information to meet this demand.
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DIETARY SUPPLEMENTS

- Innovation and consequent segmentation of sales is a key driver of dietary supplements sales in Sweden. Products increasingly offer consumers more advanced formulations. Examples include the launch of Eskimo BrainSharp and Eskimo SkinCare by Cardinova AB in September 2009. As the brand names of these launches suggest, both have a very specific functional positioning, seeking to appeal to niche consumer demands for products with these functions.

COMPETITIVE LANDSCAPE

- Friggs AB is the leading category player with a 2010 value share of 15% in 2010. Its leadership position is linked to the widely recognised Friggs brand. Friggs is present in most segments in vitamins and dietary supplements, and has a particularly strong position in grocery retailers. Friggs' products have competitive prices compared with most competitors.

PROSPECTS

- Strong trends toward natural healing and prevention over the forecast period will benefit vitamins and dietary supplements. Rising awareness of healthy lifestyles will drive sales.

CATEGORY DATA

Summary 1 Dietary Supplements: Brand Ranking by Positioning 2010

Positioning	Brand ranking	Brand
Beauty	1	
	2	
	3	
Bone	1	Removed
	2	Removed
	3	Removed
Diabetes	1	
	2	
	3	
Digestive	1	Removed
	2	Removed
	3	Removed
Energy	1	Removed
	2	Removed
	3	Removed
Eye Health	1	Removed
	2	Removed
	3	Removed
General Health	1	Removed
	2	Removed
	3	Removed
Heart Health	1	
	2	
	3	
Immune System	1	Removed
	2	Removed
	3	Removed
Joint	1	Removed
	2	Removed
	3	Removed
Memory Health	1	Removed
	2	Removed
	3	Removed
Menopause	1	Removed
	2	Removed

	3	Removed
Mood/Relaxing	'1	Removed
	2	Removed
	3	Removed
Pregnancy	1	
	2	
	3	
Sexual Health	1	Removed
	2	Removed
	3	Removed
Varicose Veins	1	
	2	
	3	
Women's Health	1	Removed
	2	Removed
	3	Removed

Source. Euromomtor tntemetions', trade interviews, company research

Table 1 Sales of Vitamins and Dietary Supplements by Category: Value 2005-2010

SEKmiliion

	2005	2006	2007	2008	2009	2010
Child-Specific Vitamins and Dietary Supplements						
Dietary Supplements						
- Combination Dietary Supplements						
- HerbalfTraditional Dietary Supplements						
- Combination Herbal! Traditional Dietary Supplements						
- Echinacea						
- Evening Primrose Oil						
- Garlic						
- Ginkgo Biloba						
- Ginseng						
- St John's Wort						
- Other Herball Traditional Dietary Supplements						
- Non-Herbal Dietary Supplements						
- Calcium Supplements						
- Co-Enzyme Q10						
- Combination Non-Herbal Dietary Supplements						
- Eye Health Supplements						
- Fish Oils						
- Glucosamine						
- Mineral Supplements						
- Omega-3-6-9 (Fish and Non-Fish)						

-- Probiotic Supplements
-- Protein Powder
-- Royal Jelly
-- Sam-E
-- Other Non-Herbal Dietary Supplements
Tonics and Bottled Nutritive Drinks
Vitamins
- Multivitamins
- Single Vitamins
-- Vitamin A
-- Vitamin B
-- Vitamin C
-- Vitamin D
-- Vitamin E
-- Other Single Vitamins
Vitamins and Dietary Supplements

Source: *Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources*

Table 2 Sales of Vitamins and Dietary Supplements by Category: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Child-Specific Vitamins and Dietary Supplements			
Dietary Supplements			
- Combination Dietary Supplements			
- Herbal/Traditional Dietary Supplements			
-- Combination Herbal/Traditional Dietary Supplements			
-- Echinacea			
-- Evening Primrose Oil			
-- Garlic			
-- Ginkgo Biloba			
-- Ginseng			
-- St John's Wort			
-- Other Herbal/Traditional Dietary Supplements			
- Non-Herbal Dietary Supplements			
-- Calcium Supplements			
-- Co-Enzyme Q10			
-- Combination Non-Herbal Dietary Supplements			
-- Eye Health Supplements			
-- Fish Oils			
-- Glucosamine			
-- Mineral Supplements			
-- Omega-3-6-9 (Fish and Non-Fish)			
-- Probiotic Supplements			
-- Protein Powder			
-- Royal Jelly			
-- Sam-E			
-- Other Non-Herbal Dietary Supplements			
Tonics and Bottled Nutritive Drinks			
Vitamins			
- Multivitamins			
- Single Vitamins			
-- Vitamin A			
-- Vitamin B			
-- Vitamin C			

-- Vitamin D	
-- Vitamin E	
-- Other Single Vitamins	
Vitamins and Dietary Supplements	[illegible]

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Dietary Supplements by Positioning 2005-2010

% retail value rsp

	2005	2006	2007	2008	2009	2010
Bone						
Digestive						
Energy						
Eye Health						
General Health						
Heart Health						
Immune System						
Joint						
Memory Health						
Menopause						
Mood/Relaxing						
Sexual Health						
Women's Health						
Other Dietary Supplement Positioning						
Total	-	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Vitamins and Dietary Supplements Company Shares by Value 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010

Total	100.0	100.0	100.0	100.0	100.0

Source: *Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources*

Table 5 Vitamins and Dietary Supplements Brand Shares by Value 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010
Total		100.0	100.0	100.0	100.0

Source: *Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources*

Table 6	Vitamins Brand Shares by Value 2007-2010				
% retail value rsp					
Brand	Company	2007	2008	2009	2010
Total		100.0	100.0	100.0	100.0

Source: *Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources*

Table 7	Dietary Supplements Brand Shares by Value 2007-2010				
% retail value rsp					
Brand	Company	2007	2008	2009	2010

Total	100.0	100.0	100.0	100.0

Source: *Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources*

Table 8 Forecast Sales of Vitamins and Dietary Supplements by Category: Value 2010-2015

SEK million	2010	2011	2012	2013	2014	2015
Child-Specific Vitamins and Dietary Supplements						
Dietary Supplements						
- Combination Dietary Supplements						
- Herbal/Traditional Dietary Supplements						
-- Combination Herbal/ Traditional Dietary Supplements						
-- Echinacea						
-- Evening Primrose Oil						
-- Garlic						
-- Ginkgo Biloba						
-- Ginseng						
-- St John's Wort						
-- Other Herbal/ Traditional Dietary Supplements						
- Non-Herbal Dietary Supplements						
-- Calcium Supplements						
-- Co-Enzyme Q10						
-- Combination Non-Herbal Dietary Supplements						
-- Eye Health Supplements						
-- Fish Oils						
-- Glucosamine						
-- Mineral Supplements						
-- Omega-3-6-9 (Fish and Non-Fish)						

-- Probiotic Supplements	
-- Protein Powder	
-- Royal Jelly	
-- Sam-E	
-- Other Non-Herbal Dietary Supplements	
Tonics and Bottled Nutritive Drinks	
Vitamins	
- Multivitamins	
- Single Vitamins	
-- Vitamin A	
-- Vitamin B	
-- Vitamin C	
-- Vitamin D	
-- Vitamin E	
-- Other Single Vitamins	
Vitamins and Dietary Supplements	

Source: *Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources*

Table 9 Forecast Sales of Vitamins and Dietary Supplements by Category: % Value Growth 2010-2015

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
Child-Specific Vitamins and Dietary Supplements		
Dietary Supplements		
- Combination Dietary Supplements		
- Herbal/Traditional Dietary Supplements		
-- Combination Herbal/Traditional Dietary Supplements		
-- Echinacea		
-- Evening Primrose Oil		
-- Garlic		
-- Ginkgo Biloba		
-- Ginseng		
-- St John's Wort		
-- Other Herbal/Traditional Dietary Supplements		
- Non-Herbal Dietary Supplements		
-- Calcium Supplements		
-- Co-Enzyme Q10		
-- Combination Non-Herbal Dietary Supplements		
-- Eye Health Supplements		
-- Fish Oils		
-- Glucosamine		
-- Mineral Supplements		
-- Omega-3-6-9 (Fish and Non-Fish)		
-- Probiotic Supplements		
-- Protein Powder		
-- Royal Jelly		
-- Sam-E		
-- Other Non-Herbal Dietary Supplements		
Tonics and Bottled Nutritive Drinks		
Vitamins		
- Multivitamins		
- Single Vitamins		
-- Vitamin A		
-- Vitamin B		
-- Vitamin C		
-- Vitamin D		
-- Vitamin E		

-- Other Single Vitamins	[redacted]	[redacted]
Vitamins and Dietary Supplements	[redacted]	[redacted]

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

VITAMINS AND DIETARY SUPPLEMENTS IN SWEDEN - COMPANY PROFILES

ABIGO MEDICAL AB IN CONSUMER HEALTH (SWEDEN)

Strategic Direction

~ The company will seek consumer health sales growth through new product developments, specifically product groups that have newly received OTC status.

Key Facts

Summary 2 Abigo Medical AS: Key Facts

'Full name of company:	Abigo Medical AS
Address:	Ekonomivagen 5, 436 33 Askim, Sweden
Tel:	+46 (31) 748950
Fax:	+46 (31) 683951
www:	www.abigo.se
Activities:	Pharmaceuticals

Source: Reisit.s«, company research

Summary 3 Abigo Medical AS: Operational Indicators

	2008	2009	2010(e)
Net sales (SEK million)	50.09	59.06	65
Net profit (SEK million)	1.28	2.5	3
Number of employees	29	30	31

Source: Ratsit.se

Company Background

~ Abigo Medical is a small privately-owned Swedish pharmaceutical company operating mainly in Sweden, but also with international activities. The company is part of the family-owned Abigo Group, comprising Abigo Medical AB, DHC, Abigo A/S and Sylak AB.

~ Abigo Medical offers its own licensed pharmaceutical and wound care products. It has approximately 35 on offer, both within Rx and OTC healthcare, Of these, the majority of the company's products have very small shares in their respective product categories.

~ Company representatives claim that its future success will be due to its highly skilled personnel. The company's key personnel have on average 20 years experience in Swedish pharmaceuticals. Doctors, researchers and other people at universities and institutions together form an integral part of the company's expanding research and development network.

Production

~ Abigo's production facilities are situated in Askim near Gothenburg and Askersund in Central Sweden. All of the company's products are produced in Sweden.

- Abigo exports its products to about 30 countries around the world.

Competitive Positioning

- The company's overall share in 20 10 was marginal, ranking Abigo 25th overall in Swedish consumer health.
- The company's share declined in the latter years of the review period,
  Abigos OTe healthcare operations comprise products across many areas. The company notably claims to have the most extensive line of vitamins on offer in Sweden, although its share of value sales was low in 2010 at just 2%.
  Within consumer health, the company focuses mainly on niche product categories, in which it supplies low cost alternatives for Apoteket pharmacies.
  The company rarely advertises its products, largely due to the small size of sales in the product areas in which it operates.
- Abigos product portfolio has a standard to economy price positioning.

Summary4 Abigo MedicalAS: CompetitivePosition2010

Product type	Value share	.Rank
Consumer healthcare	0.6%	25
Calming and sleeping products	11.3%	4
Digestive remedies	0.5%	26
Laxatives	2.3%	9
Vitamins and dietary supplements	1.9%	10
Child-speoific v itamins and dietary supplements	5.2%	6
Cal~ium supplements	5.0%	5
Multivitamins	3.8%	7
Single vitamins	11.8%	4

Source. EuromonitorInternationalfrom companyreports, companyresearch, trade sources, trade interviews

FRIGGS AB IN CONSUMER HEALTH (SWEDEN)

Strategic Direction

~ Content removed from sample

Key Facts

Summary5 FriggsAB: KeyFacts

Full name of com.pany:	Friggs AS
Address:	Riddargatan 23A, 11457 Stockholm, Sweden
Tel:	+4 6 (0)8 501 693 00
Fax:	nla
www:	triggs.com

Activities:	Consumerhearth,non-alcoholicdrinks, packaged foods

Source: *Euromonitorlnternationalfrom companyreports, companyresearch*

Summary 6 Friggs AS: Operational Indicators

	2008	2009	2010
Net sales (SEK million)	Removed	Removed	Remov-ed
Net profit.{SEKmillion)	Removed	Removed	Removed
Numberof employees	Removed	Removed	Removed

Source: *Euromonitortntemetions!from companyreports, retsit.se, a/labolag.se*

Company Background

~ Friggs AB is a subsidiary of Midsona AB. Midsona AB was formed in December 2010 following a name change. Previously Midsona was known as Midelfart Sonesson AB.

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Production

Summary 7 Friggs AS: Production Statistics 2010

Location	Brand
Norrkoping	Removed

Source: *Companyresearch, Trade intelYiews*

Competitive Positioning

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Summary 8 Friggs AS: Competitive Position 2010

Product type	Value share	Rank
Consumer health	Removed	Removed
Weight management	Removed	Removed
Meal replacement slimming	Removed	Removed
Vitamins and dietary supplements	Removed	Removed
Child-specific vitamins and dietary supplements	Removed	Removed
Echinacea	Removed	Removed
Garlic	Removed	Removed
Ginkgo Biloba	Removed	Removed
Ginseng	Removed	Removed
Calcium supplements	Removed	Removed
Co-Enzyme Q10	Removed	Removed
Omega 3-6-9	Removed	Removed
Mineral supplements	Removed	Removed
Multivitamins	Removed	Removed

Source: Euromonitor tniemetions: from company reports, company research, trade sources, trade interview»

MEDA AB IN CONSUMER HEALTH (SWEDEN)

Strategic Direction

Key Facts

Summary 9 Meda AS: Key Facts

Full name of company:	MedaAB
Address:	Box 906, SE-170 09 Sotna, Sweden
Tel:	+46 8-630 19 00
Fax:	+46 8-630 19 50

www:	Meda.se
Activities:	Manufacture, sale and distribution of pharmaceuticals.

Source: Euromonitor International from cornpany reports

Summary 10 Meda AS: Operational Indicators

Year end 31st Dec	2008	2009	2010
Net sales (SEK million)	Removed	Removed	Removed
Net profit (SEK million)	Removed	Removed	Removed
Number of employees	Removed	Removed	Removed

Source. Eurornonitor International from company reports

Company Background

- Meda AB has in the last decade evolved into a leading international speciality pharmaceutical company with full representation in Europe and North America through its own sales organisations in 50 countries.

Production

Summary 11 Meda AS: Production Statistics 2010

Location	Brand	Annual production
Merignac, France	Removed	Removed
Cologne, Germany	Removed	Removed
Decatur, Illinois, US	Removed	Removed

Source: Euromonitor InternatIOnal from company reports, company research

Competitive Positioning

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~

Summary12 MedaAS: CompetitivePosition2010

Product type	Value share	Rank
Consumer health	Removed	Removed
Digestive remedies	Removed	Removed
Indigestion and heartburn remedies	Removed	Removed
Antacids	Removed	Removed
Analgesics	Removed	Removed
Aspirin	Removed	Removed
Vitamins and dietary supplements	Removed	Removed

Source. EuromomtorIntemetions' from companyreports, companyresearch, trade interviews

CONSUMER HEALTH IN SWEDEN - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Resilience To Wider Economic Forces

Despite the weak economic climate, Swedish consumer health sales proved to be relatively immune to wider economic forces. Consumer health posted strong retail value growth once again in 2010, albeit slower than the CAGR recorded for the review period as a whole. Most mature consumer health categories proved to be resilient and posted healthy growth rates as consumers still needed to attend to their minor ailments. Growth in 2010 was also supplemented and supported by a number of other factors such as the self-medication trend, liberalisation of pharmacy sales, the continued ageing of the Swedish population and increased category segmentation.

Liberalisation Boosts Sales Growth

The de-regulation of pharmacy sales occurred in November 2009, leading to the entry of numerous new pharmacy chains. As part of this process the sale of certain OTC medicines was liberalised with distribution via mass market channels such as supermarkets and hypermarkets now possible. This change led to a strong boost in sales prompted by the greater availability and distribution of consumer health products. However, despite the de-regulation of pharmacy sales, subsequent entry of new players in pharmacy retailing sales and product availability in mass market channels, increased or significant price competition had yet to occur in Swedish consumer health at the end of the review period. The lack of price competition in the context of greater product distribution consequently encouraged the recording of strong current retail value growth rates for 2010.

Increasing Concentrated Environment

Consumer health’s sales were increasingly characterised by consolidation; numerous categories are dominated by a handful of players. Indeed major players are not just confined to one area of consumer health but have an overall presence across the spectrum of total consumer health sales. 2010 was also a year that witnessed merger and acquisition activity. The domestic player, Meda AB, firmly stated strategic goals to establish itself as a leading player. This will be achieved through a combination of organic growth and acquisition, as the company’s acquisition of BioPhausia OTC medicine product portfolio in September 2010 indicates.

Distribution Increasingly Diverse

Positive Outlook

KEY TRENDS AND DEVELOPMENTS

the Population Continues To Age

Current Impact

Outlook

Future Impact

Consumer Healthcare Proves Resilient To Wider Economic Forces

Current Impact

Outlook

Future Impact

Health and Wellness – A Driver of Sales

Current Impact

Outlook

Future Impact

Swedish Consumers Are More Willing To Self-medicate

Current Impact

Outlook

Future Impact

Liberalisation Does Not Lead To Increased Price Competition

Current Impact

Outlook

Future Impact

MARKET INDICATORS

Table 1	Consumer Expenditure on Health Goods and Medical Services 2005-2010					
SEK million	2005	2006	2007	2008	2009	2010
Pharmaceuticals,						

medical appliances/ equipment						
Outpatient services						
Hospital services						
Total						

Source: *Euromonitor International from official statistics, trade associations, trade interviews*

Table 2 Life Expectancy at Birth 2005-2010

years	2005	2006	2007	2008	2009	2010
Males						
Females						

Source: *Euromonitor International from official statistics*

MARKET DATA

Table 3 Sales of Consumer Health by Category: Value 2005-2010

SEK million	2005	2006	2007	2008	2009	2010
OTC						
Sports Nutrition						
Vitamins and Dietary Supplements						
Weight Management						
Herbal/Traditional Products						
Allergy Care						
Child-Specific Consumer Health						
Consumer Health						

Source: *Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources*

Note: *Sum of sectors is greater than the market size because the four allergy care subsectors are included in allergy care as well as cough, cold and allergy remedies, medicated skin care and eye care.*

Table 4 Sales of Consumer Health by Category: % Value Growth 2005-2010

% current value growth	2009/10	2005-10 CAGR	2005/10 TOTAL
OTC			
Sports Nutrition			
Vitamins and Dietary Supplements			
Weight Management			
Herbal/Traditional Products			
Allergy Care			
Child-Specific Consumer Health			
Consumer Health			

Source: *Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources*

Note: *Sum of sectors is greater than the market size because the four allergy care subsectors are included in allergy care as well as cough, cold and allergy remedies, medicated skin care and eye care.*

Table 5 **Consumer Health Company Shares by Value 2006-2010**

% retail value rsp

Company	2006	2007	2008	2009	2010
Total	100.0	100.0	100.0	100.0	100.0

Source: *Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources*

Table 6 **Consumer Health Brand Shares by Value 2007-2010**

% retail value rsp

Brand	Company	2007	2008	2009	2010

Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Penetration of Private Label by Category 2005-2010

% retail value rsp

	2005	2006	2007	2008	2009	2010
Consumer Health						
OTC						
Sports Nutrition						
Vitamins and Dietary Supplements						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Consumer Health by Distribution Format: % Analysis 2005-2010

% retail value rsp

	2005	2006	2007	2008	2009	2010
Store-Based Retailing						
Grocery Retailers						
Discounters						
Healthfood shops						
Hypermarkets						
Small Grocery Retailers						
Supermarkets						
Other Grocery Retailers						
Non-Grocery Retailers						
Health and Beauty Retailers						
Chemists/Pharmacies						
Parapharmacies/Drugstores						
Other Healthcare Specialist Retailers						

Mass Merchandisers						
Other Non-Grocery Retailers						
Non-Store Retailing						
Vending						
Homeshopping						
Internet Retailing						
Direct Selling						
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: *Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources*

Table 9 Sales of Consumer Health by Category and Distribution Format: % Analysis 2010

% retail value rsp

	OTC	SN	VDS	WM	HTP	AC
Store-Based Retailing						
Grocery Retailers						
Discounters						
Healthfood shops						
Hypermarkets						
Small Grocery Retailers						
Supermarkets						
Other Grocery Retailers						
Non-Grocery Retailers						
Health and Beauty Retailers						
Chemists/Pharmacies						
Parapharmacies/Drugstores						
Other Healthcare Specialist Retailers						
Mass Merchandisers						
Other Non-Grocery Retailers						
Non-Store Retailing						
Vending						
Homeshopping						
Internet Retailing						
Direct Selling						
Total	100.0	100.0	100.0	100.0	100.0	100.0

	CSCH
Store-Based Retailing	
Grocery Retailers	
Discounters	
Healthfood shops	
Hypermarkets	
Small Grocery Retailers	
Supermarkets	
Other Grocery Retailers	
Non-Grocery Retailers	
Health and Beauty Retailers	
Chemists/Pharmacies	
Parapharmacies/Drugstores	
Other Healthcare Specialist Retailers	
Mass Merchandisers	
Other Non-Grocery Retailers	
Non-Store Retailing	
Vending	

Homeshopping	
Internet Retailing	
Direct Selling	
Total	100.0

Source: *Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources*

Key: *OTC = over the counter; SN = sports nutrition; VDS = vitamins and dietary supplements; WM = weight management; HTP = herbal/traditional products; AC = Allergy Care; CSCH = child-specifirc consumer health*

Table 10 Forecast Sales of Consumer Health by Category: Value 2010-2015

SEK million

	2010	2011	2012	2013	2014	2015
OTC						
Sports Nutrition						
Vitamins and Dietary Supplements						
Weight Management						
Herbal/Traditional Products						
Allergy Care						
Child-Specific Consumer Health						
Consumer Health						

Source: *Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources*

Note: *Sum of sectors is greater than the market size because the four allergy care subsectors are included in allergy care as well as cough, cold and allergy remedies, medicated skin care and eye care.*

Table 11 Forecast Sales of Consumer Health by Category: % Value Growth 2010-2015

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
OTC		
Sports Nutrition		
Vitamins and Dietary Supplements		
Weight Management		
Herbal/Traditional Products		
Allergy Care		
Child-Specific Consumer Health		
Consumer Health		

Source: *Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources*

Note: *Sum of sectors is greater than the market size because the four allergy care subsectors are included in allergy care as well as cough, cold and allergy remedies, medicated skin care and eye care.*

APPENDIX

OTC Registration and Classification

European regulatory systems

Marketing authorisations

Advertising

Standardised Packaging Requirements

Vitamins and Dietary Supplements Registration and Classification

National legislation

Distribution

Regulation of vitamins and dietary supplements

Regulation of herbal products

Advertising

Self-medication/self-care and Preventative Medicine

Switches

Summary 1 OTC Healthcare Switches 2008-2010

Brand name	Manufacturer	Product type/Ingredient	Switch date
Alit	Removed	Removed	Removed
-	Removed	Removed	Removed
Lansopazol Mylan 30 mg enterokapsel	Removed	Removed	Removed
Omeprazol BMM Pharma 20 mg enterotablett	Removed	Removed	Removed
Bamyl Koffein 500 mgl SOmgtablet	Removed	Removed	Removed
Bamyl 500 mg Brustablett	Removed	Removed	Removed
Bamyl Koffein 500 mgl 50 mg brustablett	Removed	Removed	Removed
Telfast 120 mg filmdragerad tablet	Removed	Removed	Removed
Zomig Rapimelt 5 mg munsonderfaflande tablet	Removed	Removed	Removed
Toilax 5 mg enterotablett	Removed	Removed	Removed

Cetirizine BMM Pharma	Removed	Removed	Removed
Sumatriptan BMM Pharma 50 mg	Removed	Removed	Removed
Sumatriptan Ratiopharm 50mg	Removed	Removed	Removed
Sumatriptan Sandoz 50 mg	Removed	Removed	Removed
Dulcolax 5mg	Removed	Removed	Removed
Dulcolax 10mg	Removed	Removed	Removed
Kestine 10mg	Removed	Removed	Removed

Source. Official statistics, Lakemedelsverket), Trade interviews

DEFINITIONS

This report analyses the market for consumer health in Sweden. For the purposes of the study, the market has been defined as follows:

~ Analgesics

~ Cough, Cold And Allergy (Hay Fever) Remedies

~ Digestive Remedies

~ Medicated Skin Care

~ NRT Smoking Cessation Aids

~ Eye Care

~ Ear Care

~ Adult Mouth Care

~ Calming and Sleeping Products

~ Wound Care

~ Emergency Contraception

~ OTC Triptans

~ Vitamins and Dietary Supplements

~ Weight Management

~ Sports Nutrition

~ Herbal/Traditional Products

Explanations of words and/or terminology used in this report are as follows:

~ Leverantorsforeningen for homeopati - Swedish trade association for homeopathic therapists and suppliers

~ Lakemedelsverket - (Swedish) Medical Products Agency.

Sources used during research include the following:

Summary2 ResearchSources

OfficialSources	Laksrnedelsverket
	L1F

	Medical Products Agency
Trade Associations	Apotekens Sevice
	Association of the European Self-Medication Industry (AESGP)
	Halsokostcentralen
	Hatsokostradet
	Lakemedelsindustriforeningen
	Svensk Egerward
	Svesk Handel
Trade Press	Anarsvarlden
	Anna Bjore
	Butikens Varld
	Dagens Handel
	Dagens Industri
	Dagens Media
	Dagens Medicin
	Dagens Nyfleter
	Economic & Legal Framework for Non-Prescription Medicines (AESGP)
	Fri Kopenskap
	Hufvudstadsbladet
	Uikemede'lsvarden
	Ny Teknik
	Nyhetsbanken
	Nyhetsbyran Dlre'kt
	OTC Bulletin
	Pharma Online
	PointLex
	Resume
	SVD Ekonomi
	Svenska Dagbladet
	Sydsvenska Dagbladet
	TT Nyhetsbanken
	TT Spectra
	Veckans Affarer
	Waymaker

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