

## Industry Facts

Nutritional supplements - now a \$22.5 billion+ industry - is a consumer-driven phenomenon that is also increasingly gaining ground in the traditional medical community, particularly amid an increased acceptance of naturopathic medicine among medical providers, behavioral health clinicians and the general public at large. Consider these findings:

- ◆ Consumer focus on the use of supplements for healthcare is growing stronger in a host of segments, according to Nancy White, director of marketing for the Natural Marketing Institute (NMI), Harleysville, PA. According to NMI's 2007 Health & Wellness Trends Survey, the top health categories for supplements are weight loss, heart problems, digestion, arthritis or joint pain, seasonal allergies, vision and eye health, and diabetes.
- ◆ The percentage of Americans using dietary supplements is up several percentage points, according to an annual survey conducted by Ipsos-Public Affairs for the Council for Responsible Nutrition (CRN), Washington, D.C. "Consumers' use of dietary supplements remained fairly consistent in 2007, with 68% of American adults saying that they take dietary supplements compared to 66% the year before," the report indicates. "Interestingly, this year's survey showed that more adults than last year consider themselves to be 'regular' users of dietary supplement products, with 52% of Americans identifying themselves in that category, up from 46% in 2006," said Season Solario, director, Public Relations, CRN.
- ◆ Consumers also have more reinforcement of their interest in dietary supplements. CRN's recent Healthcare Professionals Impact Study found that "more than three-quarters of U.S. physicians (79%) and nurses (82%) recommend dietary supplements to their patients." As the frequency of clinical trials of supplements rises, these figures are expected to rise as well.
- ◆ According to the Nutrition Business Journal (NBJ), herbal dietary supplement sales in the United States demonstrated 4% growth in multiple market channels during both 2006 and 2007, with sales of herbal dietary supplements within all sales channels of the U.S. market reached approximately \$4,791,000,000 in 2007.
- ◆ Of the six dietary supplement categories tracked by NBJ, Specialty Supplements (led in dollar volume by glucosamine, homeopathic products, fish oil, CoQ10, probiotics, plant oils and enzymes) turned in the best growth in 2006 for the second consecutive year, up 11%. The performance of supplements in the natural & specialty retail channel specifically grew to \$8.3 billion or 37% of U.S. supplement sales for the period.
- ◆ Asked to anticipate the growth of U.S. consumer sales of supplements in 2007-08, most (60%) of executives who attended the annual NBJ Summit in July 2007 forecast a 5-10% increase; 22% forecast a flat market; and fully 13% predicted 10%+ growth. NBJ's conservative forecast anticipates supplement growth at 5-6% in 2007 and 2008, and 4-5% in 2009 and 2010.
- ◆ The growth of the top performing products in the estimated \$24-25 billion U.S. dietary supplement market is rising at double-digit rates thanks to increased consumer focus on health, better industry regulation, and trends geared toward greater globalization and financing, according to a report in *Nutraceuticals World*, which also cites sales in the global nutraceuticals industry are projected to reach \$187 billion by 2010, buoyed by rising sales in traditional markets like the U.S. and the European Union (EU), and by rising sales in emerging markets like China and India, according to Global Industry Analysts.
- ◆ Naturopathic doctors in North America are primary care providers trained in conventional medical sciences, diagnosis and treatment, and are experts in natural therapeutics. Licensing and training requirements vary from state to state, but at least 16 states, the District of Columbia, and five Canadian provinces have formal licensing and educational requirements. In these jurisdictions, naturopathic doctors must pass comprehensive board exams set by the North American Board of Naturopathic Examiners (NABNE) after having completed academic and clinical training at a college certified by the Council on Naturopathic Medical Education (CNME).
- ◆ Naturopathic doctors are entitled to use the designation ND or NMD, which is legally protected in sixteen US states and five Canadian provinces. They are trained to use diagnostic tests such as imaging and blood tests before deciding upon the full course of treatment.