

# **Vitamins and Dietary Supplements - Vietnam**

Euromonitor International : Country Sector Briefing

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# VITAMINS AND DIETARY SUPPLEMENTS IN VIETNAM

## HEADLINES

- Vitamins and dietary supplements grew by 8% during 2009, with sales reaching VND903 billion
- Rising consumer disposable incomes and health awareness fuelled growth during 2009
- Multivitamins led growth during 2009, with retail value sales increasing by 10% to reach VND324 billion
- Plussz Vitamin led sales during 2009, recording a retail value share of 18%
- Vitamin and dietary supplements has a projected forecast period constant retail value CAGR of 4%

## TRENDS

### Vitamins

- Vitamins recorded strong growth during 2009, with demand being fuelled by the fact that a growing number of consumers are feeling run down as a result of the increasingly hectic pace of modern life. In addition, sales are also being boosted by mass media advertising of vitamin products and rising consumer purchasing power. It should also be noted that a number of newspaper and magazine articles which claimed that vitamins could help to prevent contraction of the H1N1 virus also helped to boost sales during 2009.
- As a result of rising education levels and increased advertising, Vietnamese consumers are becoming more and more conscious of the potential benefits of vitamins and dietary supplements consumption.
- Current retail value growth of 8% in 2009 was higher than the 7% recorded in 2008, with sales being boosted by the recovery of the Vietnamese economy from the financial crisis and consequent increase in consumer confidence. In addition, demand was also boosted by population growth, the increasingly hectic pace of modern life, and rising living standards.
- Multivitamins led growth during 2009, recording current retail value growth of 10%, and will continue to perform strongly over the forecast period, with constant retail value sales expected to increase at an average annual rate of 5%. The good performance of multivitamins can be attributed to the fact that consumers perceive products which offer a comprehensive range of different vitamins as being more effective than single vitamin brands.
- Vitamins average unit prices fluctuated with the changing value of the Dong during the review period. Domestically produced vitamins followed the same trend due to the instability of imported material prices. However, it should be noted that prices were more stable in 2009 than during 2008.
- Other areas such as vitamin C and child-specific vitamins & dietary supplements also performed well during 2009, recording respective current retail value growth rates of 9% and 8%. Vitamin C is popular with consumers due to the fact that its health benefits are widely known and because it is available in a wide range of different formats and flavours.
- The penetration of vitamin products in Vietnam remains low. As a result, there is still scope for excellent growth. Sales will be boosted over the coming years as Vietnam opens the door wider to foreign companies with the result that consumers will have an increased choice of products whilst in response to increasing competition domestic producers will look to improve their existing ranges.
- Vitamin C is the most popular single vitamin product in Vietnam, mainly due to the fact that vitamin C products come in a range of different flavours and formats including child-specific versions featuring popular cartoon characters. In addition, vitamin C is also popular due to the fact that it is widely promoted for its healthy attributes within the media.
- Some vitamin fortified food and drink products are advertised as a substitute for vitamins brands and represent a minor threat to vitamins and dietary supplements sales. However, most consumers perceive

vitamins brands as being more effective than fortified food and drink products. As a result, during the review period competition between vitamins and fortified food and drink products was limited.

- Child-specific vitamins recorded current retail value growth of 8% in 2009, with sales reaching VND69 billion, and the area will continue to perform strongly over the forecast period, with constant retail value sales expected to increase at an average annual rate of 4% due to rising concerns amongst parents about the health of their children.

## Dietary Supplements

- As a result of the economic recovery, living standards and disposable incomes are rising in Vietnam at a time when increasing consumer health consciousness is fuelling interest in dietary supplements. As a result of the increasingly stressful pace of modern life, a growing number of consumers no longer have the time to eat nutritious meals. As a result, many people are turning towards dietary supplements. In addition, the growing range of available products in this area is also fuelling sales. Dietary supplements recorded current retail value growth of 5% in 2009, with sales reaching VND239 billion.
- Ginseng was the most popular dietary supplement in Vietnam during 2009, recording current retail value growth of 10%. Ginseng is particularly popular amongst the elderly. Although ginseng is relatively expensive, demand remains constant due to its perceived effectiveness. The widespread availability of fake and low quality ginseng products continues to have a negative impact on sales. However, ginseng will continue to perform well over the forecast period and has a projected constant retail value CAGR of 5%.
- Fish oils also performed well during 2009, recording current retail value growth of 7%. Fish oil is reportedly excellent for health, with many consumers taking it regularly as a disease prevention product, a nutritional supplement, and in order to treat skin and hair problems. Demand for fish oil will continue to be fuelled by rising consumer purchasing power and health consciousness over the forecast period.
- The most popular combination dietary supplement product in Vietnam is a mixture of minerals and vitamins with herbal ingredients, with such products being advertised as being ideal supplements in order to maintain health.
- Demand for dietary supplements is being fuelled by the positioning of leading brands like Union Pharma's Theravit as being able to improve metabolic reactions and which encourages good organs functioning, good for general consuming population such as adults and children aged above 12 years old.
- Child-specific vitamins & dietary products posted current retail value growth of 8% in 2009 and has a constant retail value CAGR of 4%. According to the Ministry of Health, 20% of children in Vietnam are undernourished – a figure which means that Vietnam has one of the highest child malnourishment rates in the world. As a result, there is significant demand for child-specific vitamin & dietary supplements products in the country, with Syrup Ceeline, Cyruip Nutroplex, and Syrup Lysivit being the top three brands in this area during 2009.

## COMPETITIVE LANDSCAPE

- Plusssz Vitamin led vitamins & dietary supplements sales during 2009 thanks to the popularity of its leading Plusssz brand which recorded a retail value share of 18%. The product was first launched in Vietnam in 1993 in a new and innovative format which contained vitamin C effervescent tablets. The brand has become a huge success since then, benefiting from first-mover advantage, its promotion via mass media advertising, and a well-developed network of medical and sales representatives. In addition, sales during 2009 were also boosted by a misleading advertising campaign which stated that consumption of Plusssz would could help to prevent contraction of the H1N1 virus.
- Company retail value shares remained stable during 2009, with no new players entering the area.
- Although the production capacity of domestic vitamins & dietary supplements producers is comparable to that of foreign producers, the fact that imported brands are affordably priced and are traditionally preferred by Vietnamese consumers due to their perceived higher quality means that foreign products dominate sales.
- Advertising for vitamins and dietary supplement products is expected to increase over the forecast period due to increasing competition. In addition, many companies are expected to advertise their brands on the weekly Vitamin TV game show which aims to educate Vietnamese people about the potential benefits of vitamin consumption.

- Vitamins and dietary supplements remains in an early stage of development and still has significant scope for future growth and competition between domestic and foreign companies is increasing in intensity as producers look to increase their sales shares in the high potential Vietnam market. Vitamins is an area in which domestic players have strong manufacturing capabilities while large foreign producers have the strength of their well-known brand names and large budgets to invest in new product development and marketing campaigns.
- Sales of private label brands remained negligible within vitamins & dietary supplements during the review period due to the fact that a large number of affordable branded products are available. In addition, Vietnamese consumers have more faith in the quality of branded products due to the wide availability of fake and low quality products.

## PROSPECTS

- Vitamins and dietary supplements has a projected forecast period constant retail value CAGR of 4%, with demand being fuelled by population growth, rising consumer health consciousness, and the introduction of a growing range of new innovative products.
- As the Vietnamese economy recovers from the 2008 financial crisis and develops rapidly, consumer living standards and disposable incomes will rise. In addition, increasing advertising expenditure will also help to boost consumer brand awareness and increase sales. The range of available products, flavours, and packaging formats will continue to increase over the coming years as producers compete for sales and Vietnam opens itself up to foreign companies as part of its WTO commitments.
- Threats to forecast period growth include the widespread availability of fake products and the growing popularity of vitamin fortified food and drink and functional food brands.
- Child-specific vitamins & dietary supplements products will continue to perform strongly over the forecast period, with demand being fuelled by rising disposable incomes and the fact that Vietnam has a large number of children suffering from lost appetite and nutritional deficiency. Companies will focus on introducing a growing range of different product formats and flavours in a bid to attract parents and children over the coming years.
- Vitamins & dietary supplements are considered as being luxury products in Vietnam, with demand being limited to average and higher income consumers. However, domestic companies will focus on attracting lower income consumers over the forecast period by introducing competitively priced brands. In addition, increasing competition from foreign players as a result of Vietnam's joining of the WTO will also put downwards pressure on unit prices. However, it should be noted that leading players will be reluctant to lower their prices by too much since Vietnamese consumers are traditionally sceptical of cheap consumer health products due to fears over quality.
- New 2008/2009 product launches are expected to perform well in the short-term, with demand being fuelled by rising consumer health awareness and disposable incomes. Other manufacturers will continue to launch new products and to spend heavily on advertising over the coming years in a bid to attract consumers and increase their sales shares. New product development activity will be centred on the introduction of new innovative packaging and delivery formats. In addition, a wide range of new flavours will be launched, especially within child-specific products.

## CATEGORY DATA

Table 1	Sales of Vitamins and Dietary Supplements by Subsector: Value 2004-2009					
VND billion	2004	2005	2006	2007	2008	2009
Dietary Supplements	187.4	195.9	205.7	216.8	227.3	239.3
- Combination Dietary Supplements	12.4	12.8	13.2	13.7	14.1	14.6
- Herbal/Traditional Dietary Supplements	30.1	32.2	34.4	36.4	38.4	40.7

-- Combination Herbal/ Traditional Dietary Supplements	10.5	10.9	11.3	11.7	12.1	12.6
-- Echinacea	-	-	-	-	-	-
-- Evening Primrose Oil	-	-	-	-	-	-
-- Garlic	-	-	-	-	-	-
-- Ginkgo Biloba	-	-	-	-	-	-
-- Ginseng	8.6	9.5	10.4	11.5	12.5	13.7
-- St John's Wort	-	-	-	-	-	-
-- Other Herbal/ Traditional Dietary Supplements	11.0	11.7	12.7	13.2	13.8	14.4
- Non-Herbal Dietary Supplements	157.3	163.8	171.3	180.3	188.8	198.5
-- Calcium Supplements	75.0	78.7	83.1	88.0	92.6	97.7
-- Co-Enzyme Q10	-	-	-	-	-	-
-- Combination Non- Herbal Dietary Supplements	1.8	1.9	1.9	1.9	1.9	2.0
-- Eye Health Supplements	-	-	-	-	-	-
-- Fish Oils	4.2	4.4	4.7	5.0	5.3	5.7
-- Glucosamine	-	-	-	-	-	-
-- Mineral Supplements	68.6	71.4	74.8	78.6	82.1	86.2
-- Probiotic Supplements	-	-	-	-	-	-
-- Protein Powder	-	-	-	-	-	-
-- Royal Jelly	-	-	-	-	-	-
-- Sam-E	-	-	-	-	-	-
-- Other Non-Herbal Dietary Supplements	7.6	7.4	6.9	6.8	6.9	7.0
Tonics and Bottled Nutritive Drinks	24.6	26.4	27.7	29.2	30.7	32.1
Vitamins	349.7	386.2	427.8	475.7	515.1	562.3
- Multivitamins	187.5	210.9	238.3	270.5	294.9	324.3
- Single Vitamins	162.2	175.3	189.4	205.2	220.3	237.9
-- Vitamin A	-	-	-	-	-	-
-- Vitamin B	47.7	50.7	54.0	57.7	61.2	65.5
-- Vitamin C	111.2	121.3	131.9	143.8	155.3	168.5
-- Vitamin D	-	-	-	-	-	-
-- Vitamin E	3.3	3.4	3.6	3.7	3.8	4.0
-- Other Single Vitamins	-	-	-	-	-	-
Child-Specific Vitamins and Dietary Supplements	45.4	49.5	54.5	60.2	64.4	69.2
Vitamins and Dietary Supplements	607.2	658.1	715.6	781.9	837.6	902.9

Source: Official statistics, Trade associations, Trade press, Company research, Store checks, Trade interviews, Euromonitor International estimates

**Table 2 Sales of Vitamins and Dietary Supplements by Subsector: % Value Growth 2004-2009**

% current value growth	2008/09	2004-09 CAGR	2004/09 TOTAL
Dietary Supplements	5.3	5.0	27.6
- Combination Dietary Supplements	3.5	3.4	18.1
- Herbal/Traditional Dietary Supplements	5.9	6.2	35.1
-- Combination Herbal/Traditional Dietary Supplements	3.9	3.7	19.9
-- Echinacea	-	-	-
-- Evening Primrose Oil	-	-	-
-- Garlic	-	-	-
-- Ginkgo Biloba	-	-	-
-- Ginseng	9.5	9.6	58.4
-- St John's Wort	-	-	-
-- Other Herbal/Traditional Dietary	4.5	5.6	31.2

Supplements			
- Non-Herbal Dietary Supplements	5.1	4.8	26.2
-- Calcium Supplements	5.5	5.4	30.3
-- Co-Enzyme Q10	-	-	-
-- Combination Non-Herbal Dietary Supplements	1.2	1.5	7.7
-- Eye Health Supplements	-	-	-
-- Fish Oils	6.5	6.2	35.3
-- Glucosamine	-	-	-
-- Mineral Supplements	5.0	4.7	25.6
-- Probiotic Supplements	-	-	-
-- Protein Powder	-	-	-
-- Royal Jelly	-	-	-
-- Sam-E	-	-	-
-- Other Non-Herbal Dietary Supplements	2.0	-1.8	-8.6
Tonics and Bottled Nutritive Drinks	4.5	5.5	30.5
Vitamins	9.1	10.0	60.8
- Multivitamins	10.0	11.6	73.0
- Single Vitamins	8.0	8.0	46.7
-- Vitamin A	-	-	-
-- Vitamin B	7.0	6.5	37.3
-- Vitamin C	8.5	8.7	51.5
-- Vitamin D	-	-	-
-- Vitamin E	4.0	3.7	20.1
-- Other Single Vitamins	-	-	-
Child-Specific Vitamins and Dietary Supplements	7.5	8.8	52.4
Vitamins and Dietary Supplements	7.8	8.3	48.7

Source: Official statistics, Trade associations, Trade press, Company research, Store checks, Trade interviews, Euromonitor International estimates

**Table 3 Folic Acid v Other B Vitamins 2004-2009**

% retail value rsp	2004	2005	2006	2007	2008	2009
Folic Acid	7.0	8.0	8.0	10.0	10.2	10.5
Other B Vitamins	93.0	92.0	92.0	90.0	89.8	89.5
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Official statistics, Trade associations, Trade press, Company research, Store checks, Trade interviews, Euromonitor International estimates

**Table 4 Dietary Supplements by Positioning 2006-2009**

% retail value rsp	2006	2007	2008	2009
Beauty	0.2	0.3	0.4	0.4
Bone	44.0	44.2	44.5	45.0
Digestive	0.1	0.2	0.3	0.4
General Health	48.0	47.5	47.0	47.5
Heart Health	0.5	0.4	0.3	0.3
Memory Health	3.7	3.7	4.0	4.0
Sexual Health	0.6	0.7	0.7	0.6
Other Dietary Supplement	2.9	3.0	2.8	1.8
Positioning				
Total	100.0	100.0	100.0	100.0

Source: Official statistics, Trade associations, Trade press, Company research, Store checks, Trade interviews, Euromonitor International estimates

**Table 5 Vitamins and Dietary Supplements Company Shares by Value 2005-2009**

% retail value rsp Company	2005	2006	2007	2008	2009
Plusssz Vitamin Kft	16.4	17.8	18.4	18.3	18.4
United Pharma (Vietnam) Inc	8.9	9.2	9.3	9.3	9.5
UPSA, Laboratoires	8.8	8.0	7.9	8.0	7.9
Boehringer Ingelheim GmbH	6.9	7.3	7.6	7.8	7.9
ICA Pharmaceuticals	6.3	5.3	5.7	5.9	6.1
Hoffmann La Roche Ltd	6.0	5.8	5.6	5.5	5.5
Union Pharma	3.1	3.2	3.2	3.2	3.1
Sanofi-Synthelabo Vietnam	2.8	2.9	3.0	3.0	2.9
SPM JSC	0.8	2.0	2.2	2.5	2.6
Pan Laboratories Pty Ltd	2.0	2.0	2.0	2.0	1.9
Tradewind Asia Pharmaceutical Co	1.3	1.3	1.4	1.6	1.7
Novartis Vietnam Ltd	2.8	2.1	2.0	1.8	1.6
Laboratoire Innotech International	1.3	1.3	1.3	1.2	1.2
Korea Ginseng Co Ltd	1.1	1.1	1.1	1.1	1.1
Pharmavit Kft	0.8	1.0	1.0	1.1	1.1
Haugiang Pharmaceutical Joint Stock Co	0.8	1.0	1.2	1.1	1.0
National Day Pharmaceutical Joint Stock Co	1.5	1.3	1.0	0.9	0.9
Solvay Pharma	0.9	0.8	0.8	0.8	0.8
Servier SA	1.3	1.1	0.9	0.9	0.8
Mega Lifesciences Ltd	1.0	0.9	0.9	0.8	0.7
Traphaco Joint Stock Co	0.6	0.6	0.6	0.5	0.6
Pierre Fabre SA, Laboratoires	0.9	0.7	0.7	0.5	0.5
Khapharco	0.2	0.2	0.2	0.3	0.4
Dazung Co	0.5	0.5	0.5	0.4	0.4
Ahn Gook Pharm Co Ltd	0.5	0.4	0.4	0.4	0.4
Danlex Research Labs Inc	0.4	0.4	0.3	0.3	0.3
Blédina SA	0.1	0.2	0.2	0.2	0.2
Dr Grossmann AG	0.5	0.3	0.3	0.2	0.2
Il-Yang Pharmaceutical Co Ltd	0.5	0.4	0.4	0.4	0.2
Thien Hung Medicine Co	0.2	0.2	0.2	0.1	0.1
Others	21.0	20.8	19.6	19.9	19.8
Total	100.0	100.0	100.0	100.0	100.0

Source: Trade associations, Trade press, Company research, Trade interviews, Euromonitor International estimates

**Table 6 Vitamins and Dietary Supplements Brand Shares by Value 2006-2009**

% retail value rsp Brand	Company	2006	2007	2008	2009
Plusssz	Plusssz Vitamin Kft	17.8	18.4	18.3	18.4
Pharmaton	Boehringer Ingelheim GmbH	7.3	7.6	7.8	7.9
Upsavit	UPSA, Laboratoires	7.2	7.1	7.2	7.3
Nutroplex	United Pharma (Vietnam) Inc	6.0	6.0	5.9	6.1
Homtamin	ICA Pharmaceuticals	5.0	5.4	5.5	5.7
Enervon-C	United Pharma (Vietnam) Inc	3.2	3.3	3.3	3.4
Berocca	Hoffmann La Roche Ltd	2.3	2.6	2.7	2.9
MyVita	SPM JSC	2.0	2.2	2.5	2.6
Calcium Corbiere Vitamine	Sanofi-Synthelabo Vietnam	2.3	2.3	2.3	2.3
Theravit	Union Pharma	2.3	2.3	2.2	2.2



Magnesium B6	Pan Laboratories Pty Ltd	2.0	2.0	2.0	1.9
MyVita	Tradewind Asia	1.3	1.4	1.6	1.7
	Pharmaceutical Co				
Calcium Sandoz	Novartis Vietnam Ltd	2.1	2.0	1.8	1.6
Tot'hema	Laboratoire Innotech	1.3	1.3	1.2	1.2
	International				
Supradyn	Hoffmann La Roche Ltd	1.3	1.2	1.1	1.1
Laroscobine	Hoffmann La Roche Ltd	1.3	1.2	1.1	1.1
Multivitamin	Haugiang Pharmaceutical	1.0	1.2	1.1	1.0
	Joint Stock Co				
Calcium+D	Union Pharma	0.9	1.0	1.0	0.9
Alvityl	Solvay Pharma	0.8	0.8	0.8	0.8
Biocalcium	National Day	1.0	0.8	0.8	0.8
	Pharmaceutical Joint				
	Stock Co				
Egis	Servier SA	1.1	0.9	0.9	0.8
Red-Kogin	Korea Ginseng Co Ltd	0.7	0.7	0.7	0.7
Magne B6	Sanofi-Synthelabo Vietnam	0.6	0.7	0.7	0.6
Hoat Huyet Duong Nao	Traphaco Joint Stock Co	0.6	0.6	0.5	0.6
Ginsomin Multivitamin	Mega Lifesciences Ltd	0.7	0.7	0.6	0.5
Tardiferon	Pierre Fabre SA,	0.7	0.7	0.5	0.5
	Laboratoires				
Korean	Dazung Co	0.5	0.5	0.4	0.4
Homtamin Ginseng	ICA Pharmaceuticals	0.3	0.3	0.4	0.4
Pho L	Ahn Gook Pharm Co Ltd	0.4	0.4	0.4	0.4
Dynavit	Danlex Research Labs Inc	0.4	0.3	0.3	0.3
Others		25.6	24.1	24.3	24.0
Total		100.0	100.0	100.0	100.0

Source: Trade associations, Trade press, Company research, Trade interviews, Euromonitor International estimates

**Table 7 Vitamins Brand Shares by Value 2006-2009**

% retail value rsp	Company	2006	2007	2008	2009
Brand					
Plusssz	Plusssz Vitamin Kft	24.1	24.6	24.2	24.2
Homtamin	ICA Pharmaceuticals	8.4	8.8	9.0	9.2
Pharmaton	Boehringer Ingelheim GmbH	8.4	8.8	9.0	9.1
Upsavit	UPSA, Laboratoires	8.0	7.8	7.8	7.8
Nutroplex	United Pharma (Vietnam)	6.7	6.5	6.3	6.3
	Inc				
Enervon-C	United Pharma (Vietnam)	5.3	5.4	5.4	5.5
	Inc				
Berocca	Hoffmann La Roche Ltd	3.9	4.3	4.5	4.6
MyVita	SPM JSC	3.3	3.7	4.0	4.2
MyVita	Tradewind Asia	2.2	2.4	2.6	2.8
	Pharmaceutical Co				
Supradyn	Hoffmann La Roche Ltd	2.2	2.0	1.8	1.7
Laroscobine	Hoffmann La Roche Ltd	2.2	1.9	1.7	1.7
Multivitamin	Haugiang Pharmaceutical	1.7	2.0	1.8	1.6
	Joint Stock Co				
Egis	Servier SA	1.8	1.5	1.5	1.3
Biocalcium	National Day	1.1	0.9	0.9	0.9
	Pharmaceutical Joint				
	Stock Co				
Ginsomin Multivitamin	Mega Lifesciences Ltd	1.1	1.1	1.0	0.9
Plusssz	Pharmavit Kft	-	-	-	-
Others		19.6	18.3	18.5	18.1
Total		100.0	100.0	100.0	100.0

Source: Trade associations, Trade press, Company research, Trade interviews, Euromonitor International estimates

**Table 8 Dietary Supplements Brand Shares by Value 2006-2009**

% retail value rsp Brand	Company	2006	2007	2008	2009
Upsavit	UPSA, Laboratoires	8.5	8.7	9.0	9.0
Theravit	Union Pharma	8.0	8.2	8.1	8.2
Magnesium B6	Pan Laboratories Pty Ltd	6.9	7.1	7.2	7.3
Plusssz	Plusssz Vitamin Kft	6.9	7.1	7.3	7.1
Calcium Sandoz	Novartis Vietnam Ltd	7.3	7.3	6.5	6.2
Calcium Corbiere Vitamine	Sanofi-Synthelabo Vietnam	5.2	5.5	5.6	5.7
Tot'hema	Laboratoire Innotech International	4.4	4.5	4.5	4.6
Calcium+D	Union Pharma	3.2	3.5	3.6	3.5
Magne B6	Sanofi-Synthelabo Vietnam	2.2	2.4	2.5	2.3
Hoat Huyet Duong Nao	Traphaco Joint Stock Co	2.0	2.0	2.0	2.1
Tardiferon	Pierre Fabre SA, Laboratoires	2.5	2.5	2.0	1.9
Korean	Dazung Co	1.7	1.7	1.4	1.4
Homtamin Ginseng	ICA Pharmaceuticals	1.2	1.2	1.3	1.4
Pho L	Ahn Gook Pharm Co Ltd	1.6	1.5	1.4	1.4
Biocalcium	National Day Pharmaceutical Joint Stock Co	1.2	1.0	1.0	0.9
Callimon	Dr Grossmann AG	1.2	1.0	0.9	0.9
Cod Liver Oil Forte	Mega Lifesciences Ltd	0.7	0.8	0.7	0.7
Hai Cau Hoan	Thien Hung Medicine Co	0.6	0.6	0.6	0.5
Korean Ginseng	Korea Ginseng Co Ltd	0.4	0.4	0.5	0.5
Kogin-Ginseng	Korea Ginseng Co Ltd	0.4	0.4	0.5	0.5
Red-Kogin	Korea Ginseng Co Ltd	0.3	0.3	0.4	0.4
Gaesung Red Ginseng	Korea Ginseng Co Ltd	0.3	0.3	0.3	0.3
Kogin-N	Korea Ginseng Co Ltd	0.2	0.2	0.2	0.2
Ginseng	OPC - National Pharmaceutical Enterprise No 26	0.2	0.2	0.2	0.2
Plusssz	Pharmavit Kft	-	-	-	-
Others		32.9	31.6	32.4	32.7
Total		100.0	100.0	100.0	100.0

Source: Trade associations, Trade press, Company research, Trade interviews, Euromonitor International estimates

**Table 9 Forecast Sales of Vitamins and Dietary Supplements by Subsector: Value 2009-2014**

VND billion	2009	2010	2011	2012	2013	2014
Dietary Supplements	239.3	242.1	246.3	251.7	258.5	266.7
- Combination Dietary Supplements	14.6	14.7	14.8	15.0	15.3	15.6
- Herbal/Traditional Dietary Supplements	40.7	41.6	42.7	44.0	45.6	47.4
-- Combination Herbal/ Traditional Dietary Supplements	12.6	12.7	12.9	13.1	13.4	13.7
-- Echinacea	-	-	-	-	-	-
-- Evening Primrose Oil	-	-	-	-	-	-
-- Garlic	-	-	-	-	-	-
-- Ginkgo Biloba	-	-	-	-	-	-
-- Ginseng	13.7	14.3	14.9	15.6	16.5	17.5
-- St John's Wort	-	-	-	-	-	-
-- Other Herbal/ Traditional Dietary Supplements	14.4	14.6	14.9	15.3	15.7	16.2
- Non-Herbal Dietary Supplements	198.5	200.6	203.6	207.7	212.9	219.3

-- Calcium Supplements	97.7	99.2	101.2	103.7	106.8	110.5
-- Co-Enzyme Q10	-	-	-	-	-	-
-- Combination Non-Herbal Dietary Supplements	2.0	1.9	1.9	1.9	1.9	1.9
-- Eye Health Supplements	-	-	-	-	-	-
-- Fish Oils	5.7	5.8	6.0	6.2	6.5	6.8
-- Glucosamine	-	-	-	-	-	-
-- Mineral Supplements	86.2	86.6	87.5	88.8	90.6	92.8
-- Probiotic Supplements	-	-	-	-	-	-
-- Protein Powder	-	-	-	-	-	-
-- Royal Jelly	-	-	-	-	-	-
-- Sam-E	-	-	-	-	-	-
-- Other Non-Herbal Dietary Supplements	7.0	7.0	7.0	7.1	7.2	7.3
Tonics and Bottled Nutritive Drinks	32.1	32.5	32.9	33.6	34.3	35.2
Vitamins	562.3	589.6	617.9	647.1	677.0	707.8
- Multivitamins	324.3	343.8	362.7	380.8	398.0	413.9
- Single Vitamins	237.9	245.8	255.2	266.2	279.1	293.9
-- Vitamin A	-	-	-	-	-	-
-- Vitamin B	65.5	67.4	69.8	72.6	75.9	79.6
-- Vitamin C	168.5	174.4	181.4	189.5	199.0	210.0
-- Vitamin D	-	-	-	-	-	-
-- Vitamin E	4.0	4.0	4.0	4.1	4.2	4.3
-- Other Single Vitamins	-	-	-	-	-	-
Child-Specific Vitamins and Dietary Supplements	69.2	71.0	73.1	75.6	78.7	82.2
Vitamins and Dietary Supplements	902.9	935.2	970.2	1,008.1	1,048.6	1,091.9

Source: Official statistics, Trade associations, Trade press, Company research, Trade interviews, Euromonitor International estimates

**Table 10 Forecast Sales of Vitamins and Dietary Supplements by Subsector: % Value Growth 2009-2014**

% constant value growth	2009-14 CAGR	2009/14 TOTAL
Dietary Supplements	2.2	11.5
- Combination Dietary Supplements	1.4	7.0
- Herbal/Traditional Dietary Supplements	3.1	16.4
-- Combination Herbal/Traditional Dietary Supplements	1.7	8.8
-- Echinacea	-	-
-- Evening Primrose Oil	-	-
-- Garlic	-	-
-- Ginkgo Biloba	-	-
-- Ginseng	5.0	27.6
-- St John's Wort	-	-
-- Other Herbal/Traditional Dietary Supplements	2.4	12.4
- Non-Herbal Dietary Supplements	2.0	10.5
-- Calcium Supplements	2.5	13.1
-- Co-Enzyme Q10	-	-
-- Combination Non-Herbal Dietary Supplements	-1.0	-4.9
-- Eye Health Supplements	-	-
-- Fish Oils	3.5	18.8
-- Glucosamine	-	-
-- Mineral Supplements	1.5	7.7
-- Probiotic Supplements	-	-
-- Protein Powder	-	-
-- Royal Jelly	-	-
-- Sam-E	-	-
-- Other Non-Herbal Dietary Supplements	0.9	4.5

Tonics and Bottled Nutritive Drinks	1.8	9.5
Vitamins	4.7	25.9
- Multivitamins	5.0	27.6
- Single Vitamins	4.3	23.5
-- Vitamin A	-	-
-- Vitamin B	4.0	21.7
-- Vitamin C	4.5	24.6
-- Vitamin D	-	-
-- Vitamin E	1.6	8.1
-- Other Single Vitamins	-	-
Child-Specific Vitamins and Dietary Supplements	3.5	18.8
Vitamins and Dietary Supplements	3.9	20.9

Source: Official statistics, Trade associations, Trade press, Company research, Trade interviews, Euromonitor International estimates

**Table 11 Dietary Supplements: Brand Ranking by Positioning 2009**

Positioning	Brand ranking	Brand
Beauty	1	Angel Life
		Spirulina
	2	Aloe Vera Gel
Bone	1	UPSA Calcium
	2	Plusssz Calcium
	3	Calcium
		Corbiere Vitamine
Digestive	1	Nutricleanse
Eye Health	1	Vinaga
General Health	1	Theravit
	2	Magnesium B6
	3	Tot'hema
Heart Health	1	Koenzym
	2	Heat Guard Omega 3
Memory Health	1	Hoat Huyet
		Duong Nao
	2	Pho L
Sexual Health	1	Hai Cau Hoan
	2	Oyster Plus
	3	Tasly Hoang
		Trung Thao
Other Dietary Supplement Positioning	1	Hai Cau Hoan
	2	Cadef

Source: Euromonitor International estimates