

India Dietary Supplement Market, By Product Type (Vitamin, Combination Dietary Supplements, Protein, Herbal Supplements, Fish Oil & Omega Fatty Acid, Others), By Form (Capsules, Tablets, Powder, Soft Gels, Liquid), By Distribution Channel (Pharmacies and Drug Stores, Online, Supermarkets and Hypermarkets, Others), By Application (Immunity, General Health, Energy & Weight Management, Bone & Joint Health, Others), By End User (Adults, Geriatric, Pregnant Females, Children, Infants), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

India Dietary Supplement Market was valued at USD 4.03 Billion in 2024 and is anticipated to project impressive growth in the forecast period with a CAGR of 7.45% through 2030. The Indian dietary supplement market has witnessed robust growth in recent years, fueled by shifts in consumer lifestyles, heightened health awareness, and an increasing preference for preventive healthcare. This market is expected to maintain its growth trajectory, driven by advancements in product formulations, the rapid expansion of e-commerce channels, and a growing emphasis on health maintenance.

Companies that successfully leverage digital marketing strategies, prioritize product quality, and remain responsive to evolving consumer preferences are well-positioned to excel in this competitive landscape. The Indian dietary supplement market offers

significant opportunities for both established brands and new entrants, provided they effectively navigate existing challenges and align their product offerings with consumer demands and regulatory requirements.

Key Market Drivers

Rising Health Consciousness

As health awareness escalates, consumers are increasingly adopting a proactive approach to their well-being, focusing on preventive health rather than reactive treatment. This shift is particularly evident post-COVID-19, as individuals are more vigilant about their immune health and overall fitness. Dietary supplements are being viewed as essential tools for enhancing immunity and preventing health issues. This transition is evident in the growing popularity of products that support immune function, such as vitamin C, zinc, and herbal formulations. The digital age has dramatically changed how consumers access health information. Social media, health blogs, and online forums serve as platforms for health education, where users are exposed to diverse dietary practices, nutritional benefits, and the role of supplements. Influencers and health advocates disseminate information on the advantages of dietary supplementation, which resonates with a health-conscious audience. This exposure encourages consumers to incorporate dietary supplements into their lifestyles as a means of addressing nutritional gaps and enhancing health outcomes. The rising trend of fitness and wellness in India is fostering a culture where consumers are more aware of their dietary needs and nutritional deficiencies. Gyms, fitness clubs, and wellness programs emphasize the importance of balanced nutrition, often recommending dietary supplements to complement workout regimens and optimize physical performance. This connection between fitness and supplementation drives demand, particularly among younger demographics who are eager to enhance their athletic performance and overall well-being.

There is a growing recognition among Indian consumers of the prevalence of nutritional deficiencies in the population, often exacerbated by urban lifestyles and dietary patterns. Many individuals are now more informed about common deficiencies, such as vitamin D, iron, and omega-3 fatty acids, and their potential impact on health. This awareness drives the demand for targeted dietary supplements that address specific nutritional gaps. Consumers increasingly seek out supplements as a convenient way to ensure adequate nutrient intake. With the rise of nuclear families and busy lifestyles, many individuals are responsible for managing their health independently. This shift has led to a greater reliance on dietary supplements to meet nutritional needs, especially

among working professionals who may lack time to prepare balanced meals. The convenience of dietary supplements aligns with the lifestyle of health-conscious individuals who prioritize efficiency while ensuring they meet their nutritional requirements. A growing segment of the population is embracing holistic health philosophies, which emphasize the interconnectedness of physical, mental, and emotional well-being. This perspective encourages the use of dietary supplements not only for physical health but also for mental clarity, stress relief, and emotional balance. Products aimed at improving mood, cognitive function, and stress management are gaining popularity, reflecting a broader understanding of health that extends beyond physical attributes.

India's rich tradition of Ayurveda and natural medicine has fostered a resurgence in the popularity of herbal and plant-based dietary supplements. Consumers are increasingly turning to Ayurvedic formulations that align with their health-conscious attitudes. The perception of these supplements as natural and holistic remedies appeals to those seeking alternatives to synthetic products. The integration of traditional wisdom with modern health practices underscores the growing health consciousness among consumers. As health consciousness rises, companies are responding by diversifying their product offerings to cater to specific consumer needs and preferences. This includes the development of organic, vegan, and clean-label supplements that resonate with health-conscious consumers. The increased availability of a wide range of products, coupled with transparent labeling and ethical sourcing practices, enhances consumer trust and encourages experimentation with dietary supplements. Rising health consciousness in India is a significant driver of growth in the dietary supplement market. This trend is manifested through a proactive approach to health management, increased access to information, a focus on fitness, awareness of nutritional deficiencies, changing lifestyles, holistic health perspectives, and a resurgence of traditional medicine. As consumers continue to prioritize their health, the dietary supplement market is well-positioned to expand, offering diverse opportunities for manufacturers and marketers to cater to the evolving needs of a health-aware populace.

Increasing Incidence of Lifestyle Diseases

India is witnessing a surge in non-communicable diseases (NCDs) such as diabetes, hypertension, cardiovascular diseases, and obesity. According to the World Health Organization (WHO), NCDs account for nearly 63% of all deaths in India. The growing awareness of the link between poor nutrition, sedentary lifestyles, and these diseases has led consumers to seek preventive measures, including dietary supplements that

can help mitigate health risks associated with these conditions. Products such as omega-3 fatty acids, fiber supplements, and multivitamins are increasingly being viewed as essential components of a health-conscious lifestyle. As lifestyle diseases become more prevalent, there is a significant shift towards preventive healthcare among Indian consumers. Recognizing that lifestyle choices directly affect health outcomes, individuals are proactively seeking dietary supplements to manage their health. This preventive approach fosters a market environment where consumers are motivated to invest in supplements that can potentially reduce their risk of developing chronic diseases. For instance, dietary supplements that support heart health, enhance metabolic function, and regulate blood sugar levels are becoming increasingly popular among health-conscious individuals. The rise of lifestyle diseases is often linked to poor dietary habits characterized by a lack of essential nutrients. Many urban Indians have adopted convenience-oriented diets rich in processed foods but deficient in vitamins, minerals, and other vital nutrients. As awareness of the nutritional gaps in typical diets grows, consumers are turning to dietary supplements to fill these voids. For example, individuals diagnosed with high cholesterol may seek out supplements like phytosterols, while those with hypertension might look for magnesium or potassium supplements. This demand for targeted nutritional support directly contributes to market growth.

The increasing incidence of lifestyle diseases has prompted greater consumer education regarding health and nutrition. Healthcare professionals, nutritionists, and wellness influencers are actively promoting the importance of supplementation in managing health conditions. Educational campaigns emphasize the role of dietary supplements in improving health outcomes and complementing conventional treatments. As consumers become more informed about the potential benefits of dietary supplements, they are more likely to incorporate these products into their daily routines as part of their overall health management strategy. The rise in lifestyle diseases has led supplement manufacturers to focus on developing specialized products that cater to specific health conditions. Companies are investing in research and development to create innovative formulations targeting prevalent lifestyle diseases. For example, supplements designed for weight management, blood sugar regulation, and heart health are gaining traction. This trend not only responds to consumer demand but also enables brands to differentiate themselves in a crowded market, driving growth in the dietary supplement sector. India's demographic shift, characterized by an aging population, further exacerbates the prevalence of lifestyle diseases. Older individuals are more susceptible to chronic health conditions, leading to increased demand for dietary supplements aimed at managing age-related ailments. Supplements that support joint health, cognitive function, and cardiovascular wellness are becoming essential for older adults, contributing to market expansion. Companies that cater to this demographic by

offering age-specific supplements are likely to capture a significant share of the growing market.

The rise of health trends and a burgeoning fitness culture in India have heightened awareness of lifestyle diseases and their prevention. With more individuals engaging in fitness activities, there is an increased recognition of the role of dietary supplements in enhancing performance, recovery, and overall health. Consumers are increasingly turning to protein powders, pre-workout supplements, and recovery aids to optimize their fitness routines. This growing intersection between fitness and health awareness contributes to the overall expansion of the dietary supplement market. The Indian government has recognized the importance of addressing lifestyle diseases and promoting preventive healthcare. Initiatives aimed at enhancing public awareness of nutrition and health can indirectly boost the dietary supplement market. Government endorsements of healthy lifestyles and nutritional awareness campaigns create a supportive environment for the growth of dietary supplements. As public health messages highlight the significance of dietary supplementation in disease prevention, consumer acceptance and demand are likely to rise. The increasing incidence of lifestyle diseases in India serves as a significant driver for the dietary supplement market. The prevalence of NCDs fosters a culture of preventive healthcare, with consumers seeking dietary supplements to mitigate health risks and address nutritional deficiencies. As consumer education rises, manufacturers are responding with targeted product development, catering to specific health conditions associated with lifestyle diseases. The intersection of health trends, demographic shifts, and government initiatives further underscores the growth potential of the dietary supplement market in India, creating opportunities for companies to innovate and capture the attention of health-conscious consumers.

Growing E-commerce Penetration

E-commerce platforms provide consumers with unparalleled accessibility to a wide range of dietary supplements. The convenience of shopping from home eliminates geographical barriers, allowing consumers in rural and urban areas alike to access products that may not be available in local brick-and-mortar stores. This accessibility is particularly crucial in India, where traditional retail infrastructure can be inconsistent. As a result, dietary supplements that were previously difficult to find are now readily available online, leading to increased consumer interest and purchase frequency. Online platforms enable brands to showcase a diverse array of dietary supplements, catering to various consumer needs and preferences. E-commerce sites often host numerous brands, offering consumers the opportunity to compare products, read

reviews, and explore different formulations. This extensive product assortment encourages consumers to experiment with new supplements and explore niche products that align with their health goals. As consumers become more adventurous and informed, they are likely to increase their spending on dietary supplements, thereby driving market growth. E-commerce platforms leverage data analytics and consumer insights to implement targeted marketing strategies, enhancing customer engagement. Brands can analyze purchasing behavior and preferences to deliver personalized recommendations to consumers. This tailored approach not only improves the shopping experience but also increases conversion rates. For example, consumers interested in fitness may receive suggestions for protein supplements or pre-workout formulations. By enhancing relevance through personalized marketing, companies can foster consumer loyalty and encourage repeat purchases, which contributes to overall market growth.

E-commerce platforms facilitate the sharing of consumer reviews and ratings, which serve as vital social proof for prospective buyers. In the dietary supplement market, where consumers may be cautious about product efficacy and safety, positive reviews can significantly influence purchasing decisions. E-commerce platforms enable consumers to make informed choices based on the experiences of others, thereby increasing trust in dietary supplements. This transparency encourages higher sales volumes as consumers feel more confident in their purchases, directly benefiting market growth. Many e-commerce platforms and brands are adopting subscription models and loyalty programs, providing consumers with incentives to purchase dietary supplements regularly. Subscription services, which deliver products directly to consumers on a scheduled basis, ensure a consistent supply of supplements while also offering cost savings. This model not only fosters consumer loyalty but also creates a steady revenue stream for companies. As more consumers adopt these convenient purchasing options, the overall market for dietary supplements is likely to expand. The synergy between e-commerce and social media has transformed how dietary supplements are marketed in India. Brands are increasingly leveraging social media platforms for product promotion and influencer collaborations, driving traffic to their e-commerce channels. Health and wellness influencers play a significant role in shaping consumer perceptions, often endorsing dietary supplements to their followers. This digital marketing strategy enhances brand visibility and credibility, encouraging consumers to explore and purchase supplements online, thereby bolstering market growth.

The COVID-19 pandemic accelerated the shift towards e-commerce as consumers sought safer shopping alternatives. This behavioral shift has become ingrained, with many consumers continuing to prefer online shopping even as physical stores reopen.

The pandemic heightened awareness of health and wellness, further propelling the demand for dietary supplements. E-commerce platforms have capitalized on this trend, positioning themselves as convenient channels for health-related purchases, thereby sustaining growth in the dietary supplement market. E-commerce platforms often collaborate with brands to enhance their offerings and provide exclusive products or bundles that are not available elsewhere. Such partnerships enable brands to tap into the vast customer base of established e-commerce players, gaining exposure to a broader audience. By leveraging the marketing capabilities and logistical infrastructure of e-commerce platforms, dietary supplement companies can effectively reach consumers and drive sales, contributing to overall market growth. The growing penetration of e-commerce in India is a significant catalyst for the dietary supplement market. The increased accessibility and convenience of online shopping, coupled with diverse product offerings, targeted marketing, social proof, and subscription models, create a favorable environment for consumer engagement and purchasing. Additionally, the influence of social media, pandemic-driven behavioral shifts, and strategic partnerships further enhance the growth potential of dietary supplements in the e-commerce space. As these trends continue to evolve, they will play a pivotal role in shaping the future landscape of the dietary supplement market in India.

Key Market Challenges

Regulatory Hurdles and Compliance Issues

The dietary supplement market in India faces significant regulatory challenges, primarily due to the fragmented nature of regulations governing food and health products. The Food Safety and Standards Authority of India (FSSAI) has established guidelines for dietary supplements; however, the lack of comprehensive and uniform regulations can create confusion among manufacturers and consumers alike.

The terms “dietary supplements,” “functional foods,” and “nutraceuticals” are often used interchangeably, leading to ambiguity in classification and regulation. This lack of clarity can deter potential entrants from investing in the market due to uncertainty regarding compliance requirements. Obtaining regulatory approval for new products can be time-consuming and costly. Manufacturers may face delays in product launches, impacting their competitiveness and market share. Companies must navigate complex documentation and testing requirements, which can slow down innovation and product development.

Inconsistencies in regulatory enforcement can lead to the presence of substandard or

unsafe products in the market. Consumers may become skeptical of dietary supplements if they perceive a lack of regulatory oversight, which can hinder overall market growth. Building consumer trust is critical for sustaining demand, and any incidents of non-compliance can adversely affect the entire industry.

Market Fragmentation and Competition

The Indian dietary supplement market is highly fragmented, with numerous players ranging from established brands to local manufacturers and unregulated sellers. This fragmentation poses several challenges:

The presence of numerous competitors often leads to aggressive price competition. Smaller brands and unregulated sellers may offer lower-priced products, making it difficult for established companies to maintain market share without compromising on quality or profitability. This price war can lead to reduced margins and hinder investments in research, development, and marketing. In a crowded marketplace, it can be challenging for brands to differentiate themselves. Many dietary supplements offer similar health benefits, making it difficult for consumers to discern quality and efficacy. As a result, consumers may gravitate towards familiar or lower-cost options rather than exploring premium or innovative products. This challenge limits the potential for growth in the premium segment of the market.

While e-commerce is on the rise, many consumers still prefer purchasing dietary supplements through traditional retail channels. The fragmentation of distribution networks complicates the ability of brands to reach their target consumers effectively. Smaller companies may lack the resources to establish strong distribution partnerships, restricting their market presence and growth potential.

Key Market Trends

Personalization and Customized Nutrition

As consumers become more health-conscious and informed, there is a growing demand for personalized dietary supplements tailored to individual health needs and preferences. The rise of technology, including artificial intelligence and data analytics, enables brands to offer personalized supplement recommendations based on individual health profiles, lifestyles, and dietary habits. Companies are increasingly utilizing online assessments and genetic testing to provide tailored products that align with specific health goals, whether it's weight management, immune support, or sports performance.

The growing recognition of the importance of holistic health approaches has led consumers to seek supplements that cater to their unique physiological and psychological needs. Personalized nutrition can address specific concerns, such as hormonal balance, gut health, or cognitive function, allowing consumers to engage more actively in their health management.

Personalized products foster deeper connections between brands and consumers, as individuals feel that their specific health concerns are being acknowledged and addressed. This trend not only enhances customer loyalty but also drives repeat purchases, contributing to long-term growth in the dietary supplement market.

Growth of Plant-Based and Natural Supplements

The increasing preference for plant-based and natural dietary supplements is a notable trend that aligns with broader consumer movements towards sustainability and health. Today's consumers are more discerning about ingredient sourcing and product formulations. They are increasingly inclined to choose dietary supplements that are free from artificial additives, preservatives, and genetically modified organisms (GMOs). Brands that emphasize transparency and sustainability in their sourcing practices are likely to gain a competitive advantage.

India's rich heritage of Ayurvedic medicine is experiencing a resurgence, with consumers turning to traditional herbal formulations as safe and effective alternatives to synthetic supplements. Products that harness the benefits of indigenous plants and herbs resonate well with consumers seeking natural wellness solutions. The growing acceptance of these products in mainstream health and wellness discourse is indicative of a significant market opportunity. Research highlighting the health benefits of plant-based ingredients is further driving this trend. Consumers are increasingly drawn to supplements containing natural antioxidants, anti-inflammatory compounds, and adaptogens, as they seek to improve overall health and well-being. This trend is particularly appealing to younger demographics who prioritize health and wellness in their purchasing decisions.

Segmental Insights

Product Type Insights

Based on the category of Product, the Vitamins segment emerged as the dominant in

the market for Dietary Supplement in 2024. The vitamins segment also plays a significant role in the Indian dietary supplement market. Increased awareness of the importance of vitamins for overall health and well-being has led to robust demand for vitamin supplements. This category is particularly popular among consumers looking to enhance their immunity, energy levels, and overall vitality.

The focus on health and wellness, particularly following the COVID-19 pandemic, has prompted consumers to prioritize their nutritional intake. Vitamins such as Vitamin C, Vitamin D, and various B vitamins have gained prominence, with consumers actively seeking products that enhance immune function and support metabolic health. The vitamins segment encompasses a wide array of products, including single vitamins, multivitamins, and vitamin-infused foods and beverages. This diversity allows consumers to select products that align with their specific health goals, contributing to the sustained growth of this segment.

Form Insights

The tablets segment is projected to experience rapid growth during the forecast period. Tablets hold a significant share of the dietary supplement market in India, primarily due to their convenience, stability, and cost-effectiveness. They are widely used for multivitamins, mineral supplements, and combination products, making them a popular choice among consumers seeking an easy-to-consume option.

Many consumers are accustomed to taking tablets as a form of medication and dietary supplementation. This familiarity translates into higher acceptance rates, especially among older demographics who may prefer traditional formats over newer alternatives. Tablets also allow for precise dosages, which is a crucial factor for consumers managing specific health conditions. The tablet segment offers a diverse range of products, including chewable, effervescent, and enteric-coated tablets. This versatility appeals to various consumer preferences, from those who prefer a straightforward swallowing experience to those seeking flavor or enhanced absorption. The ability to cater to specific dietary needs further solidifies tablets as a dominant form in the market. These factors collectively contribute to the growth of this segment.

Regional Insights

North India emerged as the dominant in the Dietary Supplement market in 2024, holding the largest market share in terms of value. North India, particularly urban centers like Delhi, Chandigarh, and Jaipur, has seen a marked increase in consumer awareness

regarding health and wellness. The rising prevalence of lifestyle diseases such as diabetes, hypertension, and obesity has led to a greater focus on preventive healthcare. This awareness translates into a heightened demand for dietary supplements aimed at improving overall health, boosting immunity, and enhancing physical performance. Educational campaigns by health authorities and wellness influencers further amplify this trend, fostering a culture of health-consciousness that is especially strong in this region. The rapid urbanization of North Indian cities has created a burgeoning middle class with increased disposable income. This demographic is more willing to invest in health-related products, including dietary supplements. Urban residents often have busy lifestyles and are inclined to seek convenient solutions for their nutritional needs. This trend is particularly evident in metropolitan areas where the demand for vitamins, minerals, protein supplements, and herbal products has surged. The urban population's lifestyle, coupled with rising income levels, makes North India a key market for dietary supplements.

North India is home to a diverse population with varying dietary habits and preferences. The region's culinary practices are often characterized by a rich assortment of traditional foods, yet there is a growing recognition of nutritional gaps. As consumers seek to complement their diets with essential nutrients, dietary supplements have gained popularity. Moreover, the rising interest in fitness and wellness, driven by a younger population, has led to increased consumption of protein powders, weight management products, and health drinks. Brands that cater to this diverse consumer base with a range of products tailored to regional tastes are more likely to thrive in this market. North India has a deep-rooted tradition of herbal and Ayurvedic medicine, particularly in states like Uttarakhand and Himachal Pradesh. This cultural affinity for natural remedies has translated into a significant demand for dietary supplements derived from herbs and plants. Companies that offer Ayurvedic formulations and herbal supplements often experience strong sales in this region, driven by consumer trust in traditional medicine. The popularity of Ayurvedic products is further supported by a growing awareness of their health benefits and efficacy, contributing to North India's dominance in the dietary supplement market.

Key Market Players

Amway India Enterprises Pvt. Ltd.

Herbalife International of America, Inc

DABUR INDIA LIMITED

Abbott India Limited

The Kraft Heinz Company

Himalaya Wellness Company

Sun Pharmaceutical Industries Ltd.

GSK plc

Danone India

Patanjali Ayurved Limited

Report Scope:

In this report, the India Dietary Supplement Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

India Dietary Supplement Market, By Product Type:

Vitamin

Combination Dietary Supplements

Protein

Herbal Supplements

Fish Oil & Omega Fatty Acid

Others

India Dietary Supplement Market, By Form:

Capsules

Tablets

Powder

Soft Gels

Liquid

India Dietary Supplement Market, By Distribution Channel:

Pharmacies and Drug Stores

Online

Supermarkets and Hypermarkets

Others

India Dietary Supplement Market, By Application:

Immunity

General Health

Energy & Weight Management

Bone & Joint Health

Others

India Dietary Supplement Market, By End User:

Adults

Geriatric

Pregnant Females

Children

Infants

India Dietary Supplement Market, By Region:

North India

South India

West India

East India

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Dietary Supplement Market.

Available Customizations:

India Dietary Supplement market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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