



Getting Ahead of the Curve: Blood Pressure & Stroke

By Dr. A. Elizabeth Sloan

With one in three adults already afflicted with high blood pressure (HBP)—and the incidence of stroke increasing in those under age 65 and in children—there will be unprecedented demand for products that help lower/manage blood pressure, improve artery health/circulation, prevent platelet aggregation and help cope with the various “side effects” of HBP (e.g., erectile dysfunction).

According to SymphonyIRI's November 2010 “Over-the-Counter (OTC) Medication” report, 50 million U.S. households have a member treating HBP, representing a potential \$7.8 billion annual market opportunity for OTC products, including supplements; the 27 million households with heart problems or stroke, \$4.2 billion.

Although IRI reports 87% of HBP sufferers rely on prescriptions to treat their condition, 50% also focus heavily on diet. While lower sodium, fat, calorie and high-fiber foods are “important,” sugar-free candy, ground decaffe coffee and sugar substitutes are also popular with HBP consumers (IRI). Concern surrounding high sodium levels is also driving new concerns for adequate potassium and magnesium. (For a more detailed

discussion of low sodium's market potential, see the March 2011 TrendSense column, pgs 16-17.)

For supplement marketers, HBP represents a myriad of targeted opportunities. Uncontrolled blood pressure can result in stroke, heart, artery and kidney damage, vision/memory loss and erectile dysfunction. Smokers, diabetics, African Americans, oral contraceptive users, post-menopausal women, low-level estrogen users, women with high job strain, as well as those who have high cholesterol or are overweight/obese are at greatest risk, according to the American Heart Association (AHA).

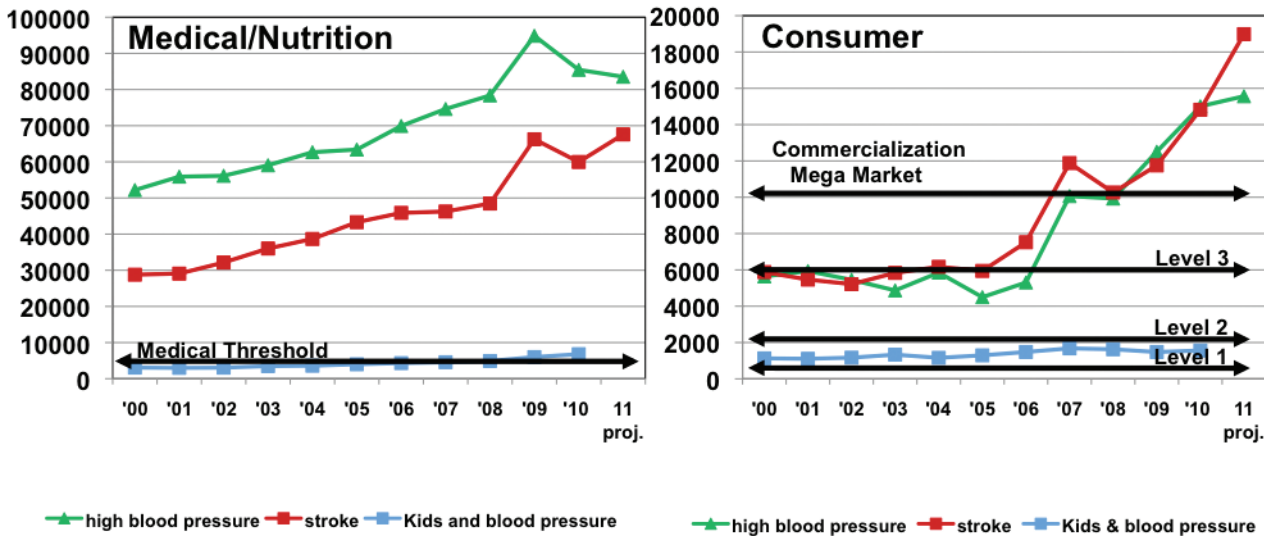
Nine in 10 (88%) consumers say they'll go to the doctor less and self-treat more even as the economy improves. Although 80% are aware of their high blood pressure and 71% are treating it, only 48% have it under control per AHA.

Market Potential

According to Sloan Trends' TrendSense Model, HBP and stroke are among the largest and fastest-moving nutraceutical markets, having reached “Mega Mass Market” status. Their enormous level of Medical Counts—approaching 100,000 new studies a year for HBP—have been accelerating rapidly during the last decade, propelling both these markets into Mega status around 2007-2008, when the CDC/NIH and the AHA moved center-stage with new data, media programs and the American Stroke Association on these growing public health issues. Even though Medical Counts appear to be flattening, HBP and stroke will continue their Mega status for years to come.

Kid's high blood pressure is another virtually untapped segment, which has quickly and quietly reached mass-market status.

Sloan Trends TrendSense™: High Blood Pressure, Stroke, Kid's HBP



* Although there are many factors that go into determining consumer trends, measuring how medical/nutrition activity levels have risen over the past decade, as well as some of the key milestones that have occurred and how these issues have been understood and embraced by the public are essential in predicting the sustainability of the Consumer trend line.

Growth Opportunities

- More than 76 million U.S. adults >age 20 have HBP; 79 million pre-hypertension; HBP is a powerful determinant of risk for stroke (AHA, 2011).
- On average, someone in the U.S. has a stroke every 40 seconds; 7 million Americans have had a stroke; 5 million a Transient Ischemic Attack or TIA (AHA, 2011).
- Consumer concern is shifting to reduction of heart disease risk factors: 66% of Boomers are concerned about HBP, 48% Gen Xers and 46% Gen Yers; vs. 46%, 34% and 25% respectively for preventative heart health (Hartman, "Re-inventing Health & Nutrition 2010").
- More young people are having strokes; the percentage of people age 20-45 having a stroke was more than 7% in 2005 vs. 4.5% 1993-94 (AHA, 2011).
- One-third of Americans are age 55+; those aged 55-64 are projected to grow 42% from 2008-18, the age when first heart attacks are most likely to occur; those 65-74 39%, the age when strokes come into play (Census, 2010).
- Of the 42% of grocery shoppers who have HBP or feel they're at risk, 65% have changed their food buying behaviors (FMI, 2010).
- Ethnic health is in the political spotlight. Blacks have a risk of first-ever stroke twice that of Whites; the prevalence of stroke is nearly 4%, Whites 2.5%, Asians 1.3%. The incidence of stroke in Mexican Americans is expected to rise 350% by 2050 (Am. Stroke Assn. 2011).
- Prevalence of HBP is highest in Black males 46%/females 43%; White males 34%/females 31%, Mexican Am. males 28%/females 29%; Asians 20% (AHA, 2011).
- HBP in children has tripled in the past year; pediatricians are now monitoring blood pressure at age 3 (AHA/AAP).
- 972 million people worldwide have HBP; two-thirds in developed countries; incidence will grow +60% to 1.56 billion by 2025 (WHO, 2010).

Functional Foods & Beverages

More than half (52%) of consumers are looking for functional foods/drinks that help lower blood pressure (Mintel, "Functional Foods-US 2009"). Half (53%) are somewhat/very concerned about sodium (IFIC, 2010). Low sodium food topped \$10 billion in sales in 2009 (Nielsen, 2010). Among those who have purchased lower/reduced sodium foods, 58% bought canned soup, 48% snacks and 41% canned vegetables; 43% say low sodium is an important snack attribute (IFIC, IRI, SnaxPo, 2010).

Blood pressure-lowering foods touting dairy peptides, omega 3/DHA/EPA and potassium have been available in parts of Europe and Japan for the past five to 10 years. Magnesium ranks as the 3rd most popular ingredient in heart-healthy foods globally (Innova Market Insights, 2011).

A unique opportunity exists for basic foods that help offer the proper mineral balance to manage blood pressure in kids. Acute anemia has also been linked to silent strokes in children (AHA, 2011). Manufacturers must be aware of AHA communications associating coffee and soda/sugar sweetened beverages with higher blood pressure levels.

Dietary Supplements

As detailed throughout this column, the physical ramifications of HBP, the many high-risk populations and rising demand for products that improve vascular health, circulation and help prevent clots offer a wide range of multi-functional and targeted products for supplement marketers.

References furnished upon request.

About the author: Dr. A. Elizabeth Sloan is president of Sloan Trends, Inc., Escondido, CA, which is a consulting firm that offers trend-tracking and predictions, strategic counsel and business-building ideas for food, supplement and pharmaceutical marketers. Each month she will provide analysis and discuss opportunities of a particular market being covered in a given issue.

SLOAN TRENDS' TRENDSENSE is a 15-year-old trend tracking system, which identifies and quantifies trends as well as predicts the optimal timing, sustainability and life-cycle stage of ingredients, terms, product opportunities and related market issues.

The model displays medical and consumer "activity levels" based on a comprehensive analysis of five critical sources of information—consumer, trade and competitive, legal and regulatory and media coverage. The resulting charts give insight into the market's changing health issues and concerns, the ingredients that are up-and-coming and those that have just about run their course, as well as what health claims, marketing messages and products will bring your company the most success.

• **Emerging Phase** = Trends begin to appear on the radar screen. Companies should begin to collect literature and market details for those that exhibit continual growth and that might be of interest.

• **Popularization Phase** = Medical/Nutrition crossover to consumer media and marketplace; opportunity for niche or specialty markets. Marketers/manufacturers should begin a detailed evaluation of the supporting marketing and scientific data and determine if this term/trend offers a good strategic fit and is appropriate to pursue. Appropriate product development procedures should be undertaken.

• **Commercialization Phase** = Mass-market ready. Mainstream consumers have a significant degree of familiarity with the term/trend and there is opportunity for competitive advantage by getting out ahead of the competition or by providing a unique and highly innovative product positioning for success.