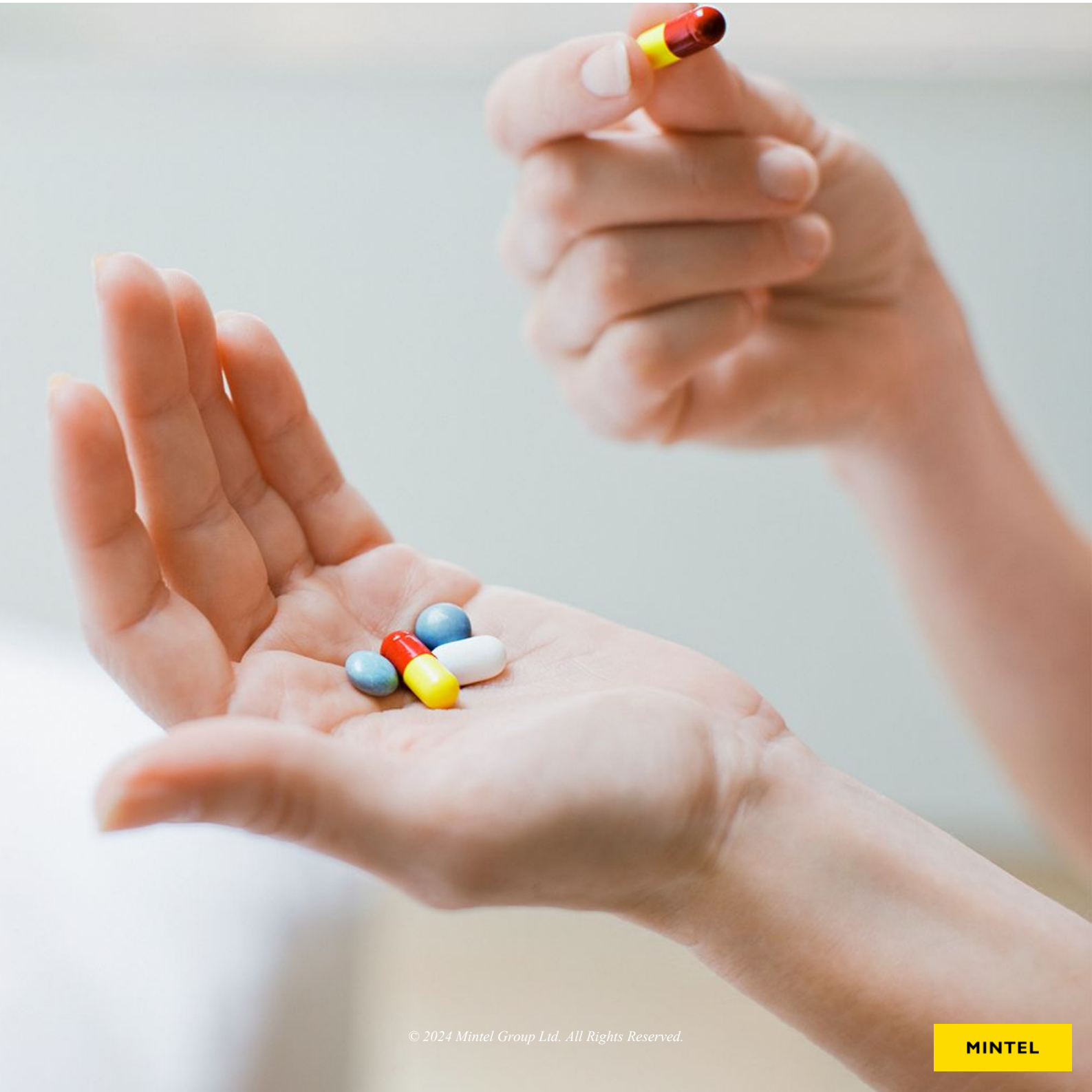


A YEAR OF INNOVATION IN VMS, 2021

Adding value to VMS are innovations focused on immunity support & mental wellbeing, the natural & eco-friendly and those offering more disruptive formats/personalised choices.



Rosalia Di Gesu,
Associate Director, Mintel
Beauty & Personal Care



Report Content



- What we have seen
- Our pick of the most innovative launches in this review

EUROPE, MIDDLE EAST & AFRICA (EMEA)

- EMEA retail market overview: VMS, 2021

Europe: on-trend themes inspire innovation

- Few consumers prioritise eco/ethical merits of VMS...
- ...but NPD anticipates increased demand for eco concepts
 - Graph 1: VMS launches by select eco and vegan claims, 2016-21
- Brands focus on minimising the environmental impact of packaging
- Eco/vegan/natural innovations aim to be more transparent and ethically-minded
- Stand out in a busy immune system-supporting space
- Uptick in immune-support claims, and spotlight on immune-support ingredients
 - Graph 2: immune-support VMS innovation by select ingredients, 2016-17 vs 2020-21
- Immune-support formulas showcase popular hero ingredients
- Beauty VMS notably harness the immune- and skin-supporting benefits of probiotics
- Innovations start to tap into the big focus on emotional/mental wellbeing
- Mental/emotional wellbeing-focused innovations slowly emerge
- Mental wellbeing-focused NPD still turns to stress-relieving CBD...
- ...and adaptogens
- Cosmetic and sanitary protection brands move into women-centric wellness VMS space

Europe: personalised concepts and disruptive formats inspire innovation

- Aim to be more disruptive with your formats
- Capsules and tablets drive NPD
 - Graph 3: VMS launches by format type*, 2016-17 vs 2020-21
- Disruptive formats blur with hot beverages...
- ...and chewing gum
- Niche liquid spray formats stress optimal absorption
- Topical formats can expand
- Personalisation trends evolve beyond quiz assessments: saliva tests
- Spotlight on MEA: fastest-growing claims
 - Graph 4: VMS launches by fastest growing claims, 2016-17 to 2020-21
- Spotlight on MEA: immune-support innovations showcase hero ingredients

A year of innovation in VMS, 2021

- Spotlight on MEA: frozen, beauty and CBD innovations stand out

ASIA PACIFIC (APAC)

- APAC retail market overview: VMS, 2021

APAC: innovation is inspired by trending themes, and sought-after benefits

- Immunity-support is a key purchase driver
- Uptick in immune-support claims, and spotlight on immune-support ingredients
 - Graph 5: VMS with functional immune system claim, 2016-21
 - Graph 6: immune-support VMS innovation by select ingredients, 2016-17 vs 2020-21
- Immune-support NPD in India mentions COVID-19 protection claims
- NPD boldly highlights immune system benefits
- On-trend post/probiotic formulas link with immune system support
- Infant formula brand brings existing trust into baby VMS
- Emergence of innovation focused on mental wellbeing
- Stress reducing NPD uses an array of hero ingredients
- Sleep/stress relief formulas blur with beauty VMS
- On-trend eco/ethical and natural messaging is set for further growth
 - Graph 7: VMS launches by select natural and eco claims, 2016-17 vs 2020-21
- Australian brand clearly conveys its 'kindness' mission
- Plastic packs dominate but brands stress use of 'less plastic' or turn to alternative materials
- Natural innovations denote safety and purity and blur with food

APAC: personalised and disruptive formats bring added value or stand out

- Capsules and tablets drive NPD – but less active formats can grow
 - Graph 8: VMS launches by format type, 2016-17 vs 2020-21
- Be inspired by alternative formats: strips and sticks
- More chew/gummy formats emerge to appeal to kids
- Premiumise with personalisation offerings

THE AMERICAS

- Americas retail market overview: VMS, 2021

Americas: innovations align with on-trend themes/benefits

- Immunity and emotional wellbeing trends inspire innovation
- Immune-support NPD spike in Latin America; potential for more stress/sleep NPD
 - Graph 9: VMS launches by immune system and stress & sleep claims, 2016-17 vs 2020-21
 - Graph 10: VMS launches by immune system and stress & sleep claims, 2016-17 vs 2020-21

A year of innovation in VMS, 2021

- Notable immune-support innovations: North America
- Notable immune-support innovations: Latin America
- Beauty VMS harness the immune- and skin-supporting benefits of probiotics
- Women-centric wellness formulas target menopause lifestage
- Sleep/stress support formulas use an array of go-to ingredients
- The appeal of natural, plant-based and 'healthy' VMS
- Fast-growing natural, 'free from' and 'healthy' claims
 - Graph 11: top five fastest growing natural, 'free from' and 'healthy' claims, 2016-17 vs 2020-21
 - Graph 12: top five fastest growing natural, 'free from' and 'healthy' claims, 2016-17 vs 2020-21
- 'Clean' and real ingredient concepts expand into VMS
- Natural brand targets the morning usage occasion
- Stand-out natural innovation in Latin America
- Somewhat limited eco claims can expand further
 - Graph 13: VMS launches by select eco claims, 2016-17 vs 2020-21
 - Graph 14: VMS launches by select eco claims, 2016-17 vs 2020-21
- Upcycled trend expands into VMS
- Eco-minded NPD focuses on pack recyclability and minimising plastic waste

Americas: premiumise with added value and disruptive formats

- Capsules dominate and increase, but look to offer an array of formats
 - Graph 15: VMS launches by format type, 2016-17 vs 2020-21
 - Graph 16: VMS launches by format type, 2016-17 vs 2020-21
- Disruptive discs, gummies and fizzing tablets stand out
- Topicals for those who struggle to swallow capsules/tablets or who have digestive issues
- Brands blur with less medicinal snacks/food

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