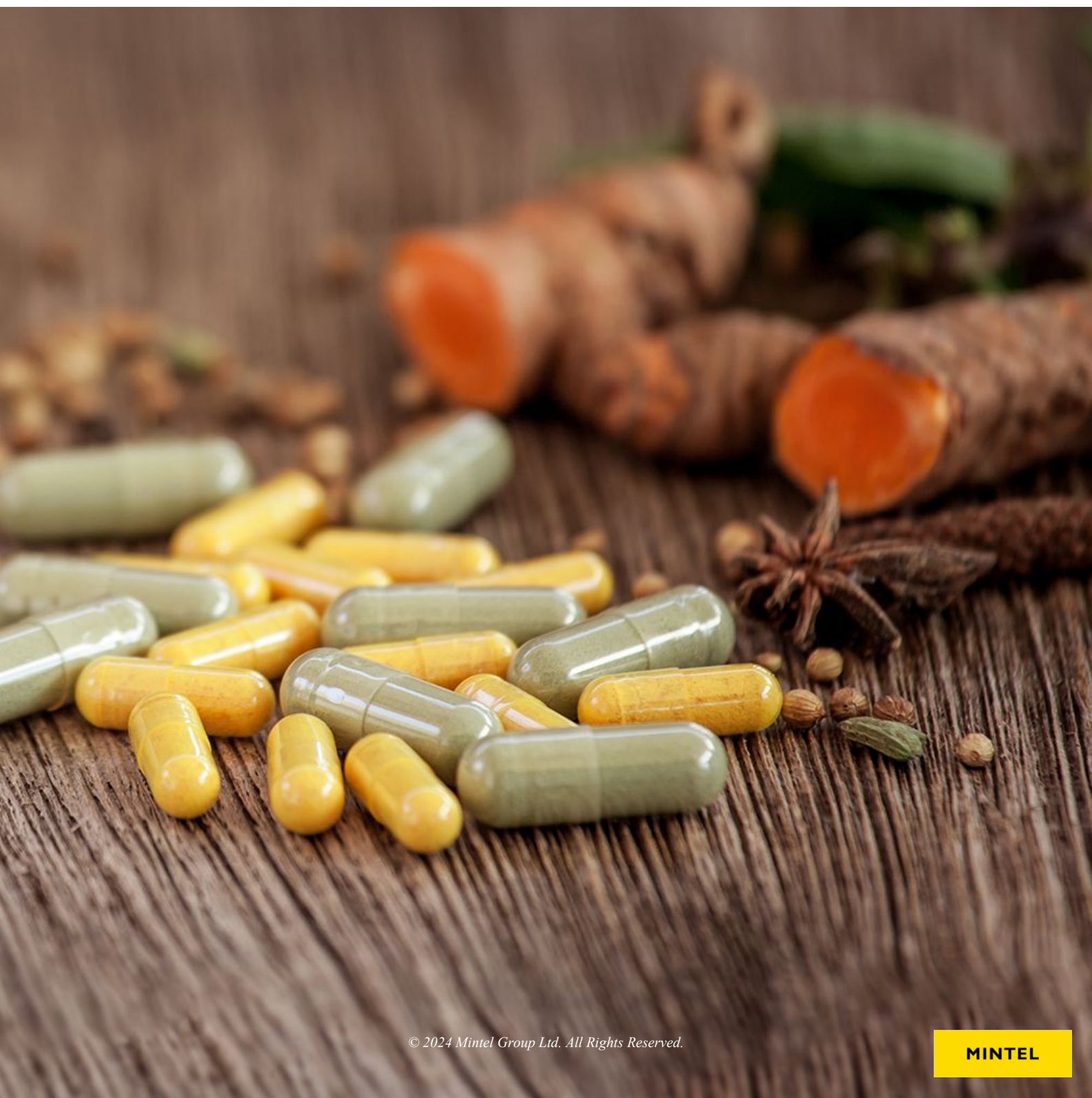


THE FUTURE OF VITAMINS AND SUPPLEMENTS: 2019

Global Annual Review: What's now and what's next for vitamins and supplements.



Stephanie Mattucci,
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Drink/Purchase
Intelligence



Report Content



- A look back, and a look ahead

THE BIG STORIES

- Mintel's perspective

Help consumers recharge

- Help people find new ways to boost energy levels
- Energize from the inside out with supplements that support mitochondrial energy production
- Target younger consumers with self-care products
 - Graph 1: stress experienced and attitudes towards managing stress and wellbeing, by age, Feb 2018
- Combat stress and fatigue with botanical ingredients
- Keep an eye on fast-moving CBD

Tap into curiosity about the microbiota

- A more holistic approach to health creates new opportunities for total microbiota support
- Target the multiple ways to support the microbiota
- Use microbiota support to engage Millennials with fiber supplements
- What's next? The gut-brain axis

Make beauty supplements more holistic

- Pair wellness with beauty supplements
- Target specific beauty needs from the inside-out
- Continue to engage consumers with beauty supplements

IN THE NEXT TWO YEARS

- Mintel's perspective

Make brain health a lifelong goal

- Target brain health needs based on life stages
- Look for multiple ways to support a healthy brain
- Address seniors' concerns about brain health

Help consumers support their immune system

- Staying healthy is important to consumers of all ages
- Promote nutrients that support the immune system
- Seniors need products that support the immune system

Develop multi-tasking sports nutrition products

- Offer multiple benefits in sports nutrition supplements to help athletes reach their goals
- Give sports nutrition consumers the benefits they want
- Lactoferrin has potential in sports nutrition for energy and immunity
- In sports nutrition, use collagen for strength and beauty

IN FIVE YEARS AND BEYOND

- Mintel's perspective
- Technology is creating new opportunities for personalized nutrition solutions
- Direct-to-consumer VMS are poised for growth
- VMS can appeal to consumer interest in personalization and e-commerce
- Amazon's private label entry into VMS taps into transparency concerns

KEY MARKET DATA

- Global retail market overview: VMS 2018
- The US and Germany lead 2018 VMS launch activity
- After unflavored, citrus and fruit flavors are the most common in VMS
- Capsules and tablets still lead in VMS format types
 - Graph 2: top 5 format types, by region, vitamins and dietary supplements, 2018
- Across regions, botanical/herbal claims are common on VMS launches
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