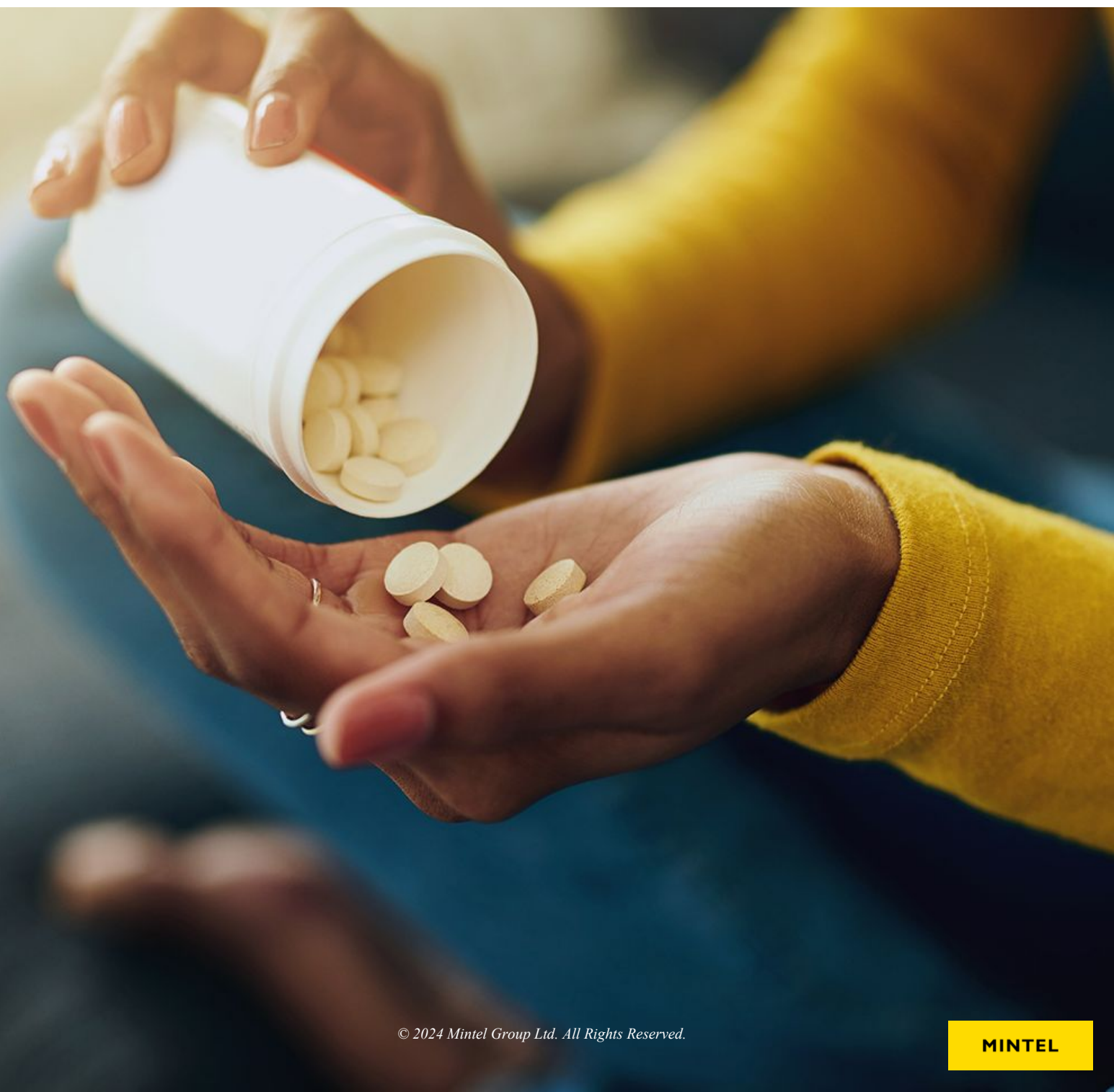


# THE FUTURE OF VITAMINS, MINERALS & SUPPLEMENTS: 2020

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



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# Report Content

- A look back, and a look ahead

## THE BIG STORIES

- Mintel's perspective

### Align VMS with broader food and drink trends

- VMS that align to broader food and drink trends should prove attractive to consumers
- VMS producers cater to the needs of plant-based dieters, free-from dieters, and eco-dieters
- Deliver VMS that support weight-loss diets like the keto diet or the intermittent fasting diet
- High-fat diets like keto promote the positive role fats/oils play in health and could open opportunities for 'new' fats/oils to grow in VMS

### Deliver clean label through transparency in VMS

- Brands start to focus on additives in VMS, removing those with an artificial image and using plant-based alternatives
- Next generation clean label will require producers to focus on all areas of a product's supply chain (not just ingredients)
- Brands deliver 'next gen' clean label by focusing on ingredient sourcing, processing and packaging
- Use natural and botanical ingredients to deliver a natural image in VMS launches
  - Graph 1: percentage of VMS product launches in POWDER format that contain select ingredients, 2017-2019

### Support holistic health with vitamins, minerals and supplements

- Cater to consumers' 'holistic' or complete health needs, focusing on emotional and mental wellbeing, as well as physical health
  - Graph 2: 'how much emphasis do you currently place on these aspects of your health and well-being?', % of consumers who agree, March 2019
- Interest in 'holistic health' may spark demand for products with adaptogenic or nootropic ingredients
- Ageing populations may drive demand for VMS that support senior consumers' cognitive and mental health

## IN THE NEXT TWO YEARS

- Mintel's perspective

### Use VMS to embrace the potential of the microbiome

- Postbiotics emerge as ingredients to watch for gut microbiome health
- As 'gut brain axis' communication starts to reach consumers, brain health could become the next focus for pre-, pro- and post-biotics

# The Future of Vitamins, Minerals & Supplements: 2020

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- As 'gut brain axis' communication starts to reach consumers, brain health could become the next focus for pre-, pro- and post-biotics
- Next generation digestive health ingredients will target 'new' microbiomes and will look beyond digestive health to 'new' areas of health

## VMS for prevention and treatment of health issues

- Preventative health is an opportunity for VMS that help consumers to live healthier for longer, protecting health for the longer term
- Preventative health is relevant to all age groups (not just seniors), because 'health' starts before conception
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- Ageing populations could drive demand for VMS that help consumers to treat health conditions like joint pain and other joint health issues
- CBD and cannabis ingredients may appeal to consumers who are treating health conditions with OTC or prescription medications
  - Graph 3: 'why might you consider treating a medical condition with cannabis and/or CBD?', % of consumers who agree, by age, Oct 2019
- Consumers link CBD with pain relief and relaxation
  - Graph 4: 'which conditions would you consider treating or managing with CBD-only product (no THC), % of consumers who agree, Oct 2019
  - Graph 5: 'which of the following do you associate with vitamins/supplements containing CBD?', % of consumers who agree, June 2019
- CBD has emerged in VMS launches, although producers will need to educate consumers about the safety of CBD and its role in health

## Focus on VMS for 'new' and emerging health concerns

- The digital era and ageing populations will drive new attention to ingredients that nourish the eyes
- Pollution can create new opportunities for VMS
- Although scarce, VMS are starting to target 'new' health problems that are relevant to today's consumer
- VMS could support the 'fertility diet' for males and females who are experiencing fertility challenges

## IN FIVE YEARS AND BEYOND

- Mintel's perspective
- Psilocybins\* could follow the footsteps of CBD, however, these are divisive ingredients that many consumers may be unsure about
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- As sustainability becomes a hygiene factor, VMS producers will be encouraged to embrace the 'refill revolution'
- The 'refill revolution' will become an expectation for eco-conscious consumers in the VMS category

- Home test-kits, in combination with subscription services, will deliver a greater degree of personalisation in the VMS category
- Patent activity in relation to DNA-based nutrition is on the rise
  - Graph 6: active (granted or pending) patent families related to DNA-based dieting technology, by year, 2000-2019

### KEY MARKET DATA

- Global retail market overview: VMS 2019
- Clean label, plant-based, and free-from claims in VMS launches
  - Graph 7: percentage of VMS launches that feature select claims linked to free from dieting, clean label and plant-based dieting, 2015-2019
- Top functional health claims in VMS launches
  - Graph 8: top functional claims in VMS launches, percentage of launches, 2015-2019
- Overall top claim categories in VMS launches
  - Graph 9: top claim categories in VMS launches, percentage of launches, 2015-2019
- After unflavoured, citrus and berry flavours are the most common in VMS
  - Graph 10: % of VMS launches by flavour profile top 10 flavour profiles (flavour component GNPD filter), 2019
- Capsules and tablets still lead in VMS format types
  - Graph 11: percentage of VMS launches by format type, 2019

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