

VITAMINS AND SUPPLEMENTS – GERMANY – 2023

The cost-of-living crisis reinforces the importance of quality calling for brands to embrace multifunctionality aligned with holistic health, natural formulas for purity, or high bioavailability for efficacy.



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Vitamins And Supplements – Germany – 2023

This report looks at the following areas:

- The short-, medium- and long-term impact of inflation on vitamins and supplements, discussing how consumers adapt their usage
- Trends in usage and usage frequency of vitamins and supplements
- Motivations for using vitamins and supplements, focusing on changes of immune health and energy demands
- Consumers' interest in vitamin and supplement formats in relation to recent launch activity and consumer attitudes towards formats
- Willingness to pay more for features in vitamins and supplements, like multifunctionality or all-natural ingredients
- Consumer behaviours towards health and vitamins and minerals, discussing future health concerns, curiosity about ingredients and interest in AI tools



The cost-of-living crisis reinforces the importance of quality calling for brands to embrace multifunctionality aligned with holistic health, natural formulas for purity, or high bioavailability for efficacy.

Overview

In 2023, 65% of Germans use VMS, rising from 60% in 2021. Health awareness has risen as consumers face multiple crises, like the pandemic and the cost-of-living crisis. At the same time, the added stress drains Germans' energy, worsens their health and makes them turn to VMS for support.

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Despite heightened need, the **pressure** on Germans' finances forces VMS users to revisit their spending. **37% of VMS users cut back or stopped using VMS** due to financial concerns in the year to September 2023. Furthermore, consumers increasingly opt for lower-priced products, helping own label gain shares in 2022.

Multivitamins **resist** this trend and outperform the market, with only **31% of multivitamin** users cutting back on VMS. Users of niche VMS, like vitamin A, are **more likely** to have made cutbacks (60%). This highlights how consumers **reassess what matters most** and which VMS is most crisis-proof.

Despite only **8% of VMS users** taking pre/pro/postbiotics, they are largely crisis-proof, which suggests users **strongly benefit** from them. Brands can capitalise on this by **diversifying the use of pre/pro/postbiotics** since **Germans** are well aware of the various health benefits of good gut health. This makes them an ideal ingredient to **enhance multifunctionality** as seen in VMS containing probiotics to support the nervous system and energy levels or foods containing prebiotics to enhance the bioavailability of iron.

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Report Content

EXECUTIVE SUMMARY

- The five year outlook for vitamins and supplements

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- The impact of the economy on vitamins and supplements
- Declining health perception sparking greater VMS use
- Keep an eye out for changing regulations

Mintel predicts

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- Further value growth to be expected for vitamins and supplements

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APPENDIX

Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

Appendix – market size and central forecast methodology

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- Forecast methodology – fan chart
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- Market forecast and prediction intervals – value

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