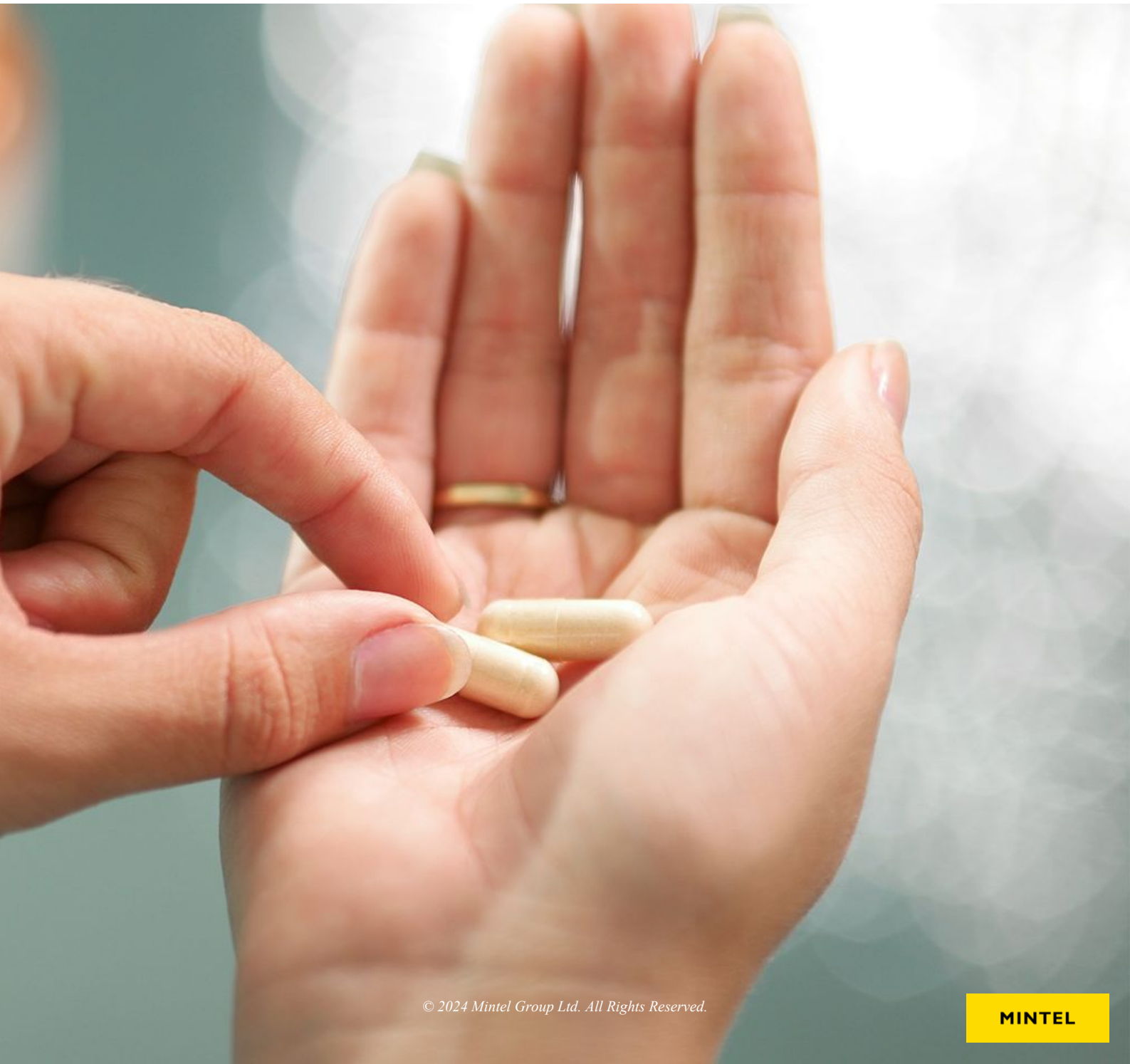


# VITAMINS, MINERALS & SUPPLEMENTS – THAI CONSUMER – 2021

Increased interest in immune health and consumers' pursuit of holistic wellbeing have opened up new opportunities for the VMS category in the ageing Thai market.



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Drink - Thai Consumer



# Report Content



### EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

### Market context

- COVID-19 makes vitamins, minerals, and supplements more relevant than ever
- Thailand's ageing society will drive category growth

### What consumers want and why

- The ideal VMS product: natural, easy-to-consume and strongly endorsed by credible organisations
- Consumers seek holistic health
  - Graph 1: motivations to take VMS products, 2021
- Senior consumers are interested in Thai herbs and probiotics
  - Graph 2: ingredients of interest in VMS, by age, 2021
- Younger consumers demand environmentally friendly features
  - Graph 3: packaging of preference for VMS, by age, 2021
- VMS usage is characterised by different life stages and demographic make-up
- Understanding the VMS consumer segments

### Opportunities

- Opportunities for the Proactivists
- Opportunities for the Fixers
- Opportunities for Disapprovers

### Mintel predicts

- The outlook of vitamins, minerals and supplements in Thailand
- The marketing mix – the 4Ps
- Vitamins, minerals and supplements can expect an even brighter future in 2021

### KEY TRENDS

- What you need to know

### Global trends and how they are playing out in Thailand

- Holistic health becomes a bigger priority
- VMS will go clean and clear label
  - Graph 4: VMS launches, by 'clean label' claim category, 2016-21

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- Self-care is becoming popular due to increased healthcare costs
- Self-reliant consumers claim to know themselves best, driving the need for personalisation
- Thailand has a large space to grow in VMS category
  - Graph 5: launches in VMS category, by market, 2016-21

## Key trends impacting vitamins, minerals and supplements in Thailand

- Thailand's ageing population drives the relevance for VMS
- As consumers age, eye, brain and immune health come under spotlight
  - Graph 6: added benefits consumers are interested in getting from food/drink, by age, 2020
- Thailand's pollution problem paves way for anti-pollution claims in VMS
- Botanical/herbal ingredients have a promising future in Thailand
  - Graph 7: % of VMS launches that feature selected claims linked to clean label, 2016-21
- Thailand's digital age is giving rise to the need for product guidance
- Thai consumers are embracing on-demand offerings

## CONSUMER INSIGHTS

- What you need to know
- VMS usage among Thais lacks regularity
  - Graph 8: VMS consumption frequency, 2021
- VMS is perceived as a solution to achieve better physical health
  - Graph 9: motivations to take VMS products, 2021
- In pursuit of better health, Thai consumers use VMS to fill suspected nutritional gaps, even without diagnosis by experts
  - Graph 10: motivations to take VMS products, 2021
  - Graph 11: motivations to take VMS products, 2021
- Product prototype: opportunities for natural, easy-to-consume VMS products with strong endorsements from credible organisations
- 55+ consumers are more interested in Thai herbs and probiotics than younger age groups are
  - Graph 12: ingredients of interest in VMS, by age, 2021
- Among various herbal remedies, Thai herbs are still the most appealing ingredients among Thai consumers
  - Graph 13: interest in herbal ingredients in VMS, 2021
  - Graph 14: interest in herbal ingredients in VMS, by age and gender, 2021
- Format preferences significantly vary by age groups
  - Graph 15: format of interest in VMS, by age and gender, 2021
- Science-related claims appeal to well-to-do consumers and those with higher education
  - Graph 16: select claims of interest in VMS products – higher bioavailability, education and financial situation, 2021
- Convenience store is the next promising sales channel for VMS products
- Apart from natural looking and on-the-go packaging, younger consumers demand environmentally friendly features
  - Graph 17: packaging of preference for VMS, by age, 2021

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- The pandemic strongly expedited consumers' interest in immune health and the need to stay fit
  - Graph 18: health benefits of interest from VMS products, 2021
- Meet the three types of Thai VMS users

## Segment #1: The Proactivist

- The Proactivist (18%)
- Demographic profile: The Proactivist
- The Proactivists are firm believers of VMS products' health benefits
  - Graph 19: VMS attitude index by segment, 2021
- Self-motivation drives Proactivists to pursue preventive health
  - Graph 20: motivations to take VMS products by segment, 2021
- VMS in powder format appeals more to Proactivists
  - Graph 21: VMS format of interest, 2021
- Lower trust in health professionals
  - Graph 22: claims of interest on VMS products, 2021
- Immunity-boosting benefit receives the highest interest among the Proactivists
  - Graph 23: health benefits consumers are interested in getting from VMS products – any rank, 2021

## Segment #2: The Fixer

- The Fixer (53%)
- Demographic profile: The Fixer
- VMS products are perceived to be a quick-fix remedy to minor health ailments
  - Graph 24: VMS attitude index by segment, 2021
- Social factors play stronger roles in motivating the Fixers
  - Graph 25: motivation to take VMS products by segment, 2021
- Low awareness of probiotics among Fixers is limiting its ability to drive VMS usage
  - Graph 26: VMS ingredients of interest, 2021
- Lower trust in claims endorsed by credible organisations
  - Graph 27: claims of interest on VMS products, 2021
- Direct sales have the highest chance among the Fixers
  - Graph 28: consumer interest in purchasing VMS products via direct sales agent by segment, 2021
- Young age blunts Fixers' interest in health benefits
  - Graph 29: health benefits of interest from VMS products, 2021

## Segment #3: The Disapprover

- The Disapprover (29%)
- The Disapprover demographics
- Scepticism demotivates VMS adoption
  - Graph 30: VMS attitude index by segment, 2021

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  - Graph 31: VMS product usage frequency, 2021
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## MARKET APPLICATIONS

- Opportunity: key areas of focus
- Capsule leads VMS format types
  - Graph 33: share of format type in VMS launches, 2016-21

### Opportunities for the Proactivists

- Powder format has potential among Proactivists
- Immune-supporting claims rise; spotlight on immune-supporting ingredients
  - Graph 34: immune health VMS innovation, by select ingredients, 2018-19 vs 2020-21
  - Graph 35: share of VMS with immune system claim, 2016-21
- Pair immune health benefits with formulations to reduce stress and improve sleep
- Offer better immunity with hydration
- Harness the immunity-, digestion- and skin-supporting benefits of probiotics and prebiotics
- Brands offering immune health benefits can differentiate and maintain engagement by aligning with other on-trend themes
- Infant formula brand brings existing trust into baby VMS

### Opportunities for the Fixers

- Innovation in skin, nails and hair functional claims has been rising significantly over the last five years
  - Graph 36: share of VMS product launches, by beauty-related claims, 2016-21
- Stand out with a skin health approach to support immune health
- Beauty VMS notably tackle the immunity- and skin-supporting benefits of probiotics
- Hydration is the key to anti-ageing and healthy skin
  - Graph 37: % of beauty supplement product launches with skin hydration benefits, by market, 2016-21
- Incorporate hydration-boosting ingredients in beauty VMS
- A complex VMS regulatory environment means that educating consumers on immunity and how it works could help boost credibility

### Opportunities for the Disapprovers

- Innovations start to tap into the big focus on mental health enhancement
- Educate consumers and help them make informed choices
- Offer memory aid supplements for the Disapprover segment
- Ingredient watch: explore the potential of cannabidiol (CBD) in supplements

## Global innovations

- Deliver a natural image via botanical ingredients in VMS
- Focus on minimising the environmental impact of packaging

## APPENDIX

- Consumer research methodology

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