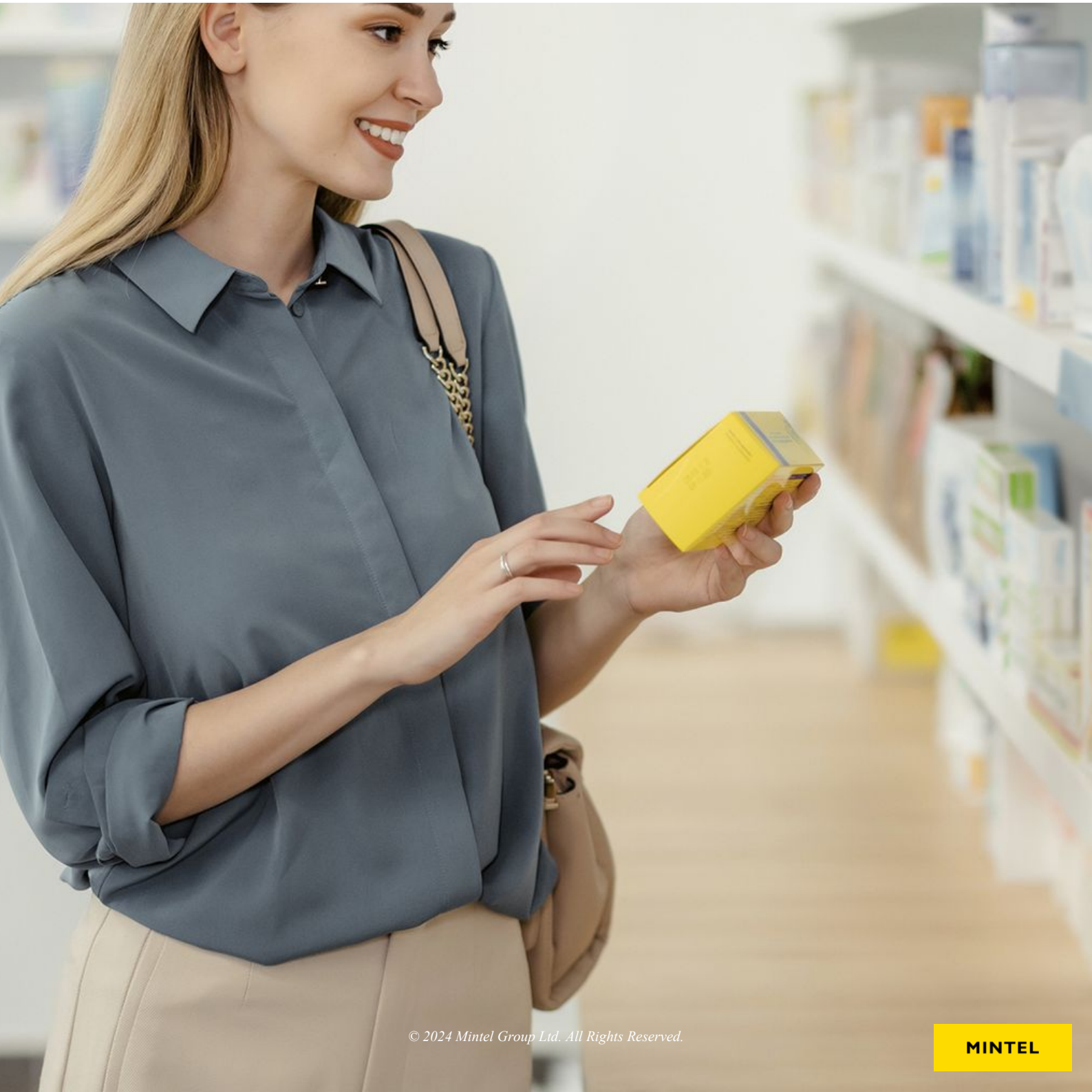


VITAMINS, MINERALS & SUPPLEMENTS – US – 2023

Self-empowerment underpins VMS, from use to discovery. Brands can enhance empowerment perceptions via education and offerings that expand sense of personal choice.



Adriana Chychula,
Analyst - Food, Drink &
Nutrition



Vitamins, Minerals & Supplements - US - 2023

This report looks at the following areas:

- The VMS market and key players
- Competitive strategies and market opportunities
- Consumer VMS use and changes
- Format preferences
- VMS targets and barriers to use
- VMS discovery strategies
- VMS attitudes

Overview

Consumers want solutions that feel unique to them, but multivitamins' year over year stability relative to other declining segments reminds brands of the value of simplicity. In this vein, half of consumers keep their VMS repertoires to one or two products - and **these consumers are the ones more likely to report maintaining their habits.**

The crux of VMS use comes from an added sense of control and is even seen through consumers' discovery tactics, largely self-guided. However, this proactivity only goes as far as brands' consumer-facing education and marketing meets them.

Current limits to true personalized nutrition don't prohibit customized solutions. Done well, a sense of empowerment via choice and communications in consumers' language can arm them with powerful concepts every time they engage with VMS.



Self-empowerment underpins VMS, from use to discovery. Brands can enhance empowerment perceptions via education and offerings that expand sense of personal choice.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- VMS category outlook
- Opportunities

CONSUMER INSIGHTS

Consumer fast facts

Vitamin, mineral & supplement consumption

- Simple, catch-all solutions have stable appeal
 - Graph 1: VMS use in the last 12 months, 2022-23
- Half of VMS consumers keep it to one or two products
 - Graph 2: VMS use repertoire, 2023
- Gen Z's habits are up for grabs
 - Graph 3: VMS use in last 12 months, by generation, 2023
- Connect specialized ingredients to results for fathers
 - Graph 4: VMS use in the last 12 months, by parental status and gender, 2023

Targets for vitamin, mineral & supplement use

- Consumers just want to feel their best
 - Graph 5: targets for VMS use, 2023
- Help Millennials navigate new lifestage needs
 - Graph 6: targets for VMS use, by generation, 2023
- Mothers demonstrate diverse VMS target range
 - Graph 7: targets for VMS use, by parental status and gender, 2023

Barriers to vitamin, mineral & supplement use

- Keep speaking consumers' language
 - Graph 8: barriers to VMS use, 2023

Changes in vitamin, mineral & supplement use

- Good news: routines are staying strong
 - Graph 9: changes in VMS use, 2023
- Enter younger consumers' changing habits

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- Graph 10: changes in VMS use, by generation, 2023
- Parenthood amps up VMS usage
 - Graph 11: changes in VMS use, by parental status and gender, 2023

Vitamin, mineral & supplement formats preferred

- Traditional formats have high appeal
 - Graph 12: VMS formats preferred, 2023
- Make VMS intake an experience to Gen Z
 - Graph 13: VMS formats preferred, by generation, 2023
- Give parents more alternative formats
 - Graph 14: VMS formats preferred, by parental status and gender, 2023

Vitamin, mineral & supplement discovery

- Empowerment is at the crux
- Consumers use a well-rounded mix of input
 - Graph 15: VMS discovery channels, 2023
- Younger consumers crowdsource – make products worth recommending
 - Graph 16: VMS discovery, by generation, 2023
- Women leaning on medical advice most
 - Graph 17: VMS discovery, by parental status and gender, 2023

Attitudes toward vitamins, minerals & supplements

- Holistic wellness is the name of the game
 - Graph 18: interest in VMS options to support mental wellbeing, 2023
- Immediate needs come first
- Position mental healthcare as proactive self-care across ages
- Consumers still have questions but are receptive to VMS answers
 - Graph 19: attitudes toward VMS, 2023
- Position personalized innovation to parents
 - Graph 20: attitudes toward VMS, by parental status and gender, 2023

COMPETITIVE STRATEGIES

Launch activity & innovation

- Brands pair "look good, feel good" messaging with matching aesthetics
- It's all in the delivery: liposomal vitamin C encapsulates the idea of "better" nutrition
- It's all in the delivery: liposomal vitamins encapsulate the idea of "better" nutrition
- Format innovations leave the "how" up to the consumer

Opportunities

- Tap into under-utilized, "nature"-aligned ingredients
- Make deeper connections to reinforce value
- Nutrient synergy: stronger together
- Use science to holistically bundle mental and physical health
- "Better for Us" approach connects consumer wellness to the planet

THE MARKET

- Market context

Market drivers

- Residual impact of COVID-19 despite return to "normal"
- Calls to improve guardrails, decrease grey area in VMS landscape
- Social media drills fast pathways to engagement – but can cave in
- Case study: berberine, "nature's Ozempic"

Market size and forecast

- Retail sales and forecast of VMS

Market segmentation

- Retail sales of VMS, by segment
- Retail sales of VMS, by channel

Market share/brand share

- Private label snags market sliver amid mixed turnout

Company/brand sales by segment

- Dismal performances across board as vitamin market drops 5.5%
- Nestlé, Pharmavite, Unilever among major mineral/supplement wins

APPENDIX

Appendix – the consumer

- Simplicity streamlines momentum
 - Graph 21: changes in VMS use, by repertoire of VMS use, 2023

Appendix – the market

- Market size and forecast: inflation-adjusted prices
- Market segments
- Average household spending

Appendix – data sources and abbreviations

- Market definition
- Consumer research methodology
- Generations
- Abbreviations
- Forecast
- Forecast fan chart

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