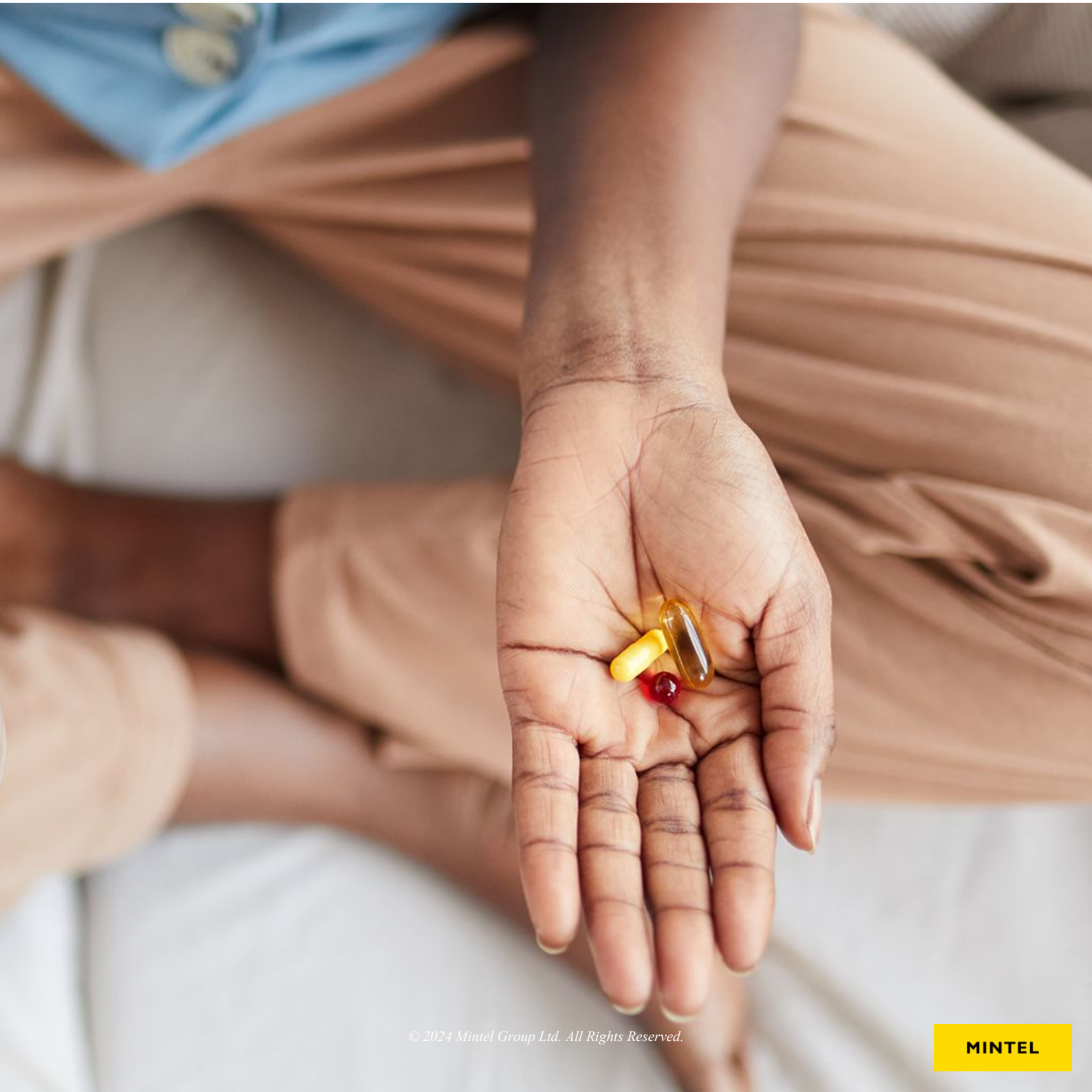


VITAMINS & SUPPLEMENTS – GERMANY – 2022

Personalised solutions have strong potential and sustainability is evolving from a nice-to-have to a must-have for branding and new product development.



Heidi Lanschützer, Deputy
Research Director,
Germany



Vitamins & Supplements - Germany - 2022

This report looks at the following areas:

- Usage frequency of vitamins, minerals and supplements, with vitamin D and magnesium leading
- Motivations for using VMS, with support of the immune system being the principal motivation
- Barriers to vitamins and supplements, with the preference to get vitamins/minerals from one's diet being the greatest
- Factors prompting people to start taking VMS, with self-diagnosis of a particular vitamin/mineral deficiency being the leading factor
- Consumer behaviours related to and attitudes towards VMS
- Trends in launch activity and opportunities for further innovation



Personalised solutions have strong potential and sustainability is evolving from a nice-to-have to a must-have for branding and new product development.

Overview

Vitamins and supplements with organic ingredients are seen as better for people's health than non-organic ones by **62% of VMS users**. Despite the consumer interest, organic claims are underexplored in VMS, featuring on just **16% of NPD in 2021**.

Consumers are already noticing rising prices. If inflation continues to rise, financially vulnerable consumers will likely trade down or cut back on volume, as there will be less money for discretionary products like VMS.

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The growing competition from mainstream food and drink (49% of German VMS non-users prefer to get vitamins/minerals from their diet) and lack of trust in VMS (34% of VMS non-users don't trust that they deliver on claims) are the biggest challenges for the market.

Personalised nutrition has a strong market outlook and is evolving quickly. Consumers' interest in it is high, which means a great opportunity for personalised nutrition that also offers opportunities for premiumisation.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for VMS

Market context

- Six in ten Germans use VMS
- Consumers need to be persuaded of the benefits that VMS can offer them
- Ageing populations will drive demand for VMS that support the needs of older adults

Mintel predicts

- VMS sales will continue to post healthy growth
- Healthy growth expected for VMS over the next five years
- Market size & forecast

Opportunities

- Combine immune health with other benefits consumers desire
 - Graph 1: motivations for using VMS, 2021
- Offer VMS tailored to individual needs
- Incorporate seasonal health needs into supplement offerings
- Make VMS feel more like food
- Win over consumers with sustainability efforts
- Use sustainable packaging materials or refill options
- Capitalise on organic's superior health image
- Overcome lack of trust through collaboration with medical professionals or testimonials

The competitive landscape

- P&G retains the top position in the VMS market...
 - Graph 2: company retail market share of VMS, by value, 2019 vs 2020
- Quick download resources

MARKET DRIVERS

- German economy hit hard by COVID-19 disruptions
- Strong post-COVID-19 bounceback followed by a period of slower growth
 - Graph 3: key economic data, in real terms, 2019-23

- Rising inflation squeezes household incomes
- COVID-19 has put the spotlight on health
- Ageing population is good news for supplements
- Food and drink is a big competitor of dietary supplements

WHAT CONSUMERS WANT AND WHY

Usage of vitamins, minerals and supplements

- Over-55s most likely to use VMS on a daily basis
 - Graph 4: usage frequency of VMS, by age, 2021

Types of VMS used

- Vitamin D, C and multivitamins remain the most used vitamins
 - Graph 5: types of vitamins used, 2020 and 2021
- Vitamin D positioned as the 'sunshine vitamin'
- Magnesium remains the most used mineral
 - Graph 6: types of minerals and other supplements used, 2020 vs 2021

Motivations for using VMS

- Support of the immune system is the top motivation for using VMS
 - Graph 7: motivations for using VMS, 2021
- Organic formulations and multi-benefit products can help stand out in the competitive immunity market
- Capitalise on the link between immune and gut health
- Germany-based Mybacs promotes importance of healthy microbiome for overall health
- Immune health coupled with energy support also warrants attention
- Cognitive health: huge potential for nootropics, but consumer education needed
- International inspiration for nootropic ingredients

Barriers for using VMS

- Germans prefer to get nutrients from their diet
 - Graph 8: barriers for using VMS, 2021
- Lack of trust and knowledge are also barriers
 - Graph 9: lack of trust and knowledge as barriers for using VMS, 2021
- Encourage prevention rather than cure
- Gain trust through testimonials
- VMS in direct competition with food and drink

Reasons for using VMS

- Self-diagnosed vitamin/mineral deficiency is the top reason for using VMS
 - Graph 10: reasons for using VMS, 2021

Vitamins & Supplements – Germany – 2022

- Great opportunity for personalisation of VMS
- German VMS brands tap into personalised nutrition trend
- Seasonal supplements are a perfect fit for the personalisation trend
- International inspiration: solutions for different seasons
- Personalised, seasonal solutions are already found in other categories
- Nesfinity – a health app to meet individualised life needs

Behaviours regarding VMS

- Responsible packaging prompts consumers to switch brands/products
 - Graph 11: behaviours regarding VMS, 2022
- Sustainability will be increasingly important for the VMS market
- Appeal to eco-friendly demands with sustainable materials or refill options
- VMS products with sustainable packaging are on the rise
- Online presence is important for VMS brands
- Sunday Natural offers "ultra-pure", naturally sourced nutritional products
- Appeal with organic ingredients
- Organic cosmetics brand Weleda enters the organic dietary supplements market

LAUNCH ACTIVITY AND INNOVATION

- Capsules remain the top VMS format type
 - Graph 12: launches of VMS, by format, 2017 vs 2021
- Explore 'clean label' proposition
- Vegan VMS on the rise
 - Graph 13: vegan/no animal ingredient claims in VMS launches, 2017-21
- Ethical claims also grow strongly
 - Graph 14: launches of VMS, by top five ethical claims, 2020 vs 2021
- Immune health is the most widespread functional claim in VMS
 - Graph 15: launches of VMS, by selected functional claims, 2017 vs 2021
- Seasoning brand Brecht taps into VMS market
- Emotional wellbeing and stress reduction are growing priorities for consumers, but still niche in NPD
- VMS to help people balance their mood and emotions are niche but have huge potential
- Private label is still missing out on important trends
 - Graph 16: leading claims for VMS launches, by private label vs brands, 2021

MARKET SHARE

Retail market share of VMS, by value, 2019-20

- Procter & Gamble remains the leader in the VMS market

MARKET SIZE, SEGMENTATION AND FORECAST

- Single/dual vitamins take the lead
- VMS sales expected to continue to rise
- Healthy growth expected for VMS over the next five years

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

- Forecast methodology
- Market size – value
- Market forecast and prediction intervals – value

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