



# vitamins

— 2021 —

OUR SELECTED TRENDS,  
INSIGHTS & OBSERVATIONS

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CROWSNEST  
*trend horizons*



# WELCOME

As specialists in beauty and healthcare over the past 23 years, we have always been obsessed with ‘what comes next’. One area of high interest is the vitamins and supplements market which was already seeing enormous growth pre-pandemic and looks set to continue to deliver record breaking sales as this new way of life continues.

Consumers are exploring different ways to support and optimise their physical health and mental wellbeing. With quarantine forcing consumers into different daily routines challenging their work/life balance they are seeing the impact the pandemic is having on their health and wellness and most importantly are open to learning about what they can do to resolve any negative impact.

We have explored how this thriving sector of the wellness industry is evolving under 3 macro trends, we have been charting the new concerns and attitudes among supplement consumers and the innovations altering the type of products they’re purchasing.

We hope that our perspective on vitamins and supplements is food for thought and would love to hear what you think of it.

We look forward to speaking with you.

\*Stylus [Reports and Data](#), 2019

## KILLER STATS

# 5.5%

Supplements have been selling at a healthy rate, with compound annual growth of 5.5% globally forecast from 2018-26\*

# 6.4%

When recession hit in 2008 US supplement sales rose 6.4% YOY.

# 38%

Thirty-eight per cent of Americans believe supplements are safer than over-the-counter or prescription drugs, and 32% believe they work just as well\*\*\*

\*\*\*[Consumer Reports](#), 2019

## OUR AREAS

### ONE COVID DRIVERS

IMMUNITY  
SLEEP  
MENTAL WELLBEING

### TWO MOTHER NATURE

NATURAL REMEDIES  
ANCIENT WISDOM  
LIFESTYLE

### THREE IN CONTROL

BESPOKE  
BIOMARKERS  
DELIVERY SYSTEMS



# COVID DRIVERS

IMMUNITY | SLEEP | MENTAL WELLBEING

The new opportunity for supplement brands is the growing trend around managing an array of physical as well as mental needs – most notably catapulting concerns around **immunity, sleep** and **emotional health** – while avoiding traditional prescription pharmaceuticals.

25%

jump in US sales of immunity supplements is forecast for 2020\*\*

No.1

Mental health is the top health benefit of interest among supplements users aged 18-34 in the US and UK

300%

Revenue from sleep supplements on Chinese e-commerce giant Alibaba's T-mall platform increased 300% YOY in 2018

\*\**Nutrition Business Journal (NBj)*, 2020 |

\*\*\**Glanbia*, 2020 |

\*\*\**China Daily*, 2019



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# Immunity

*The \$6.65bn immunity category – the third-largest segment of the global supplements market was going strong before consumer interest surged with Covid-19 and is now predicted to explode in growth.*

## Lovebug Probiotics

Brands are tapping into the growing belief that overuse of antibiotics destroys our microbiome which is thought to be responsible for our immunity, In response they are marketing probiotics specifically for immunity like US supplement makers Lovebug.

## Wylde One

Alongside age-old immunity helpers like vitamin C&D, brands are harnessing a wide menu of functional ingredients. This reflects growing consumer interest in botanicals, including adaptogens such as ashwaganda and immune boosters like reishi mushroom.





# Sleep

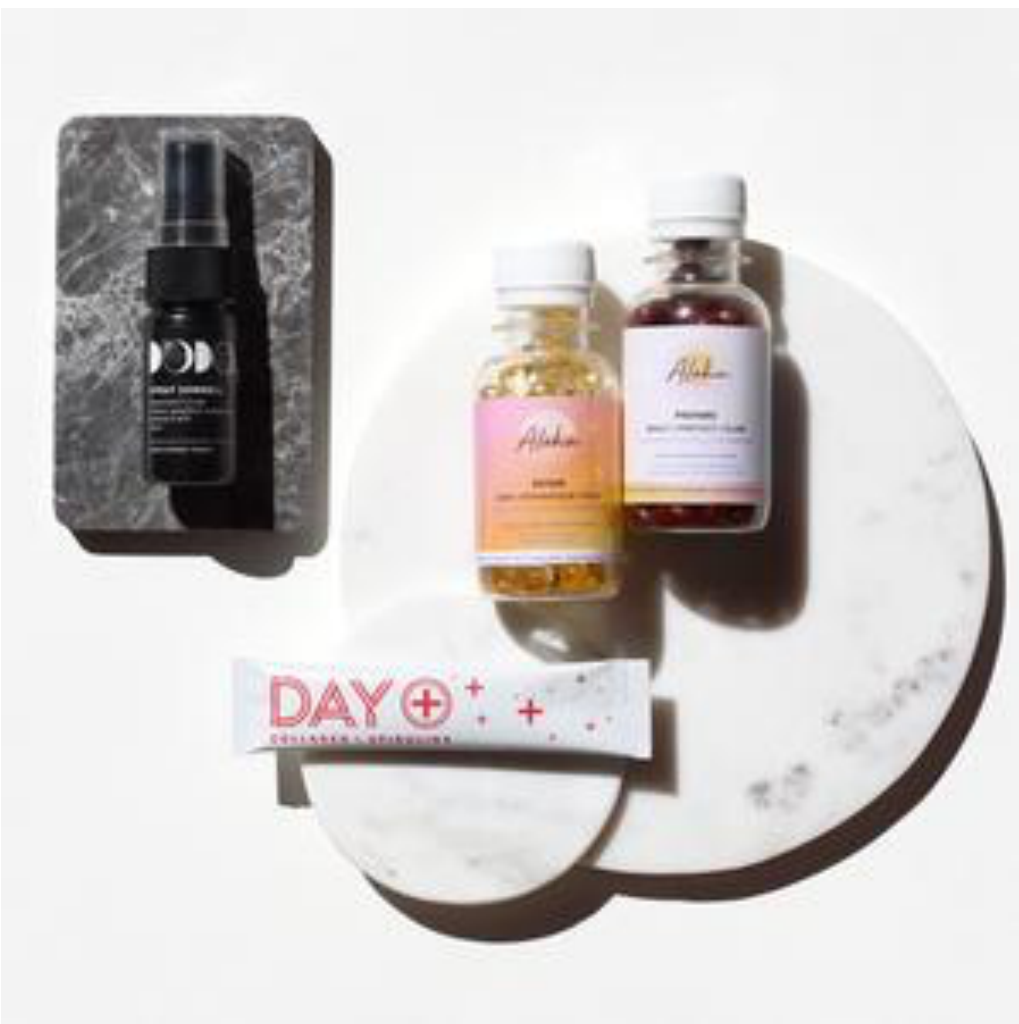
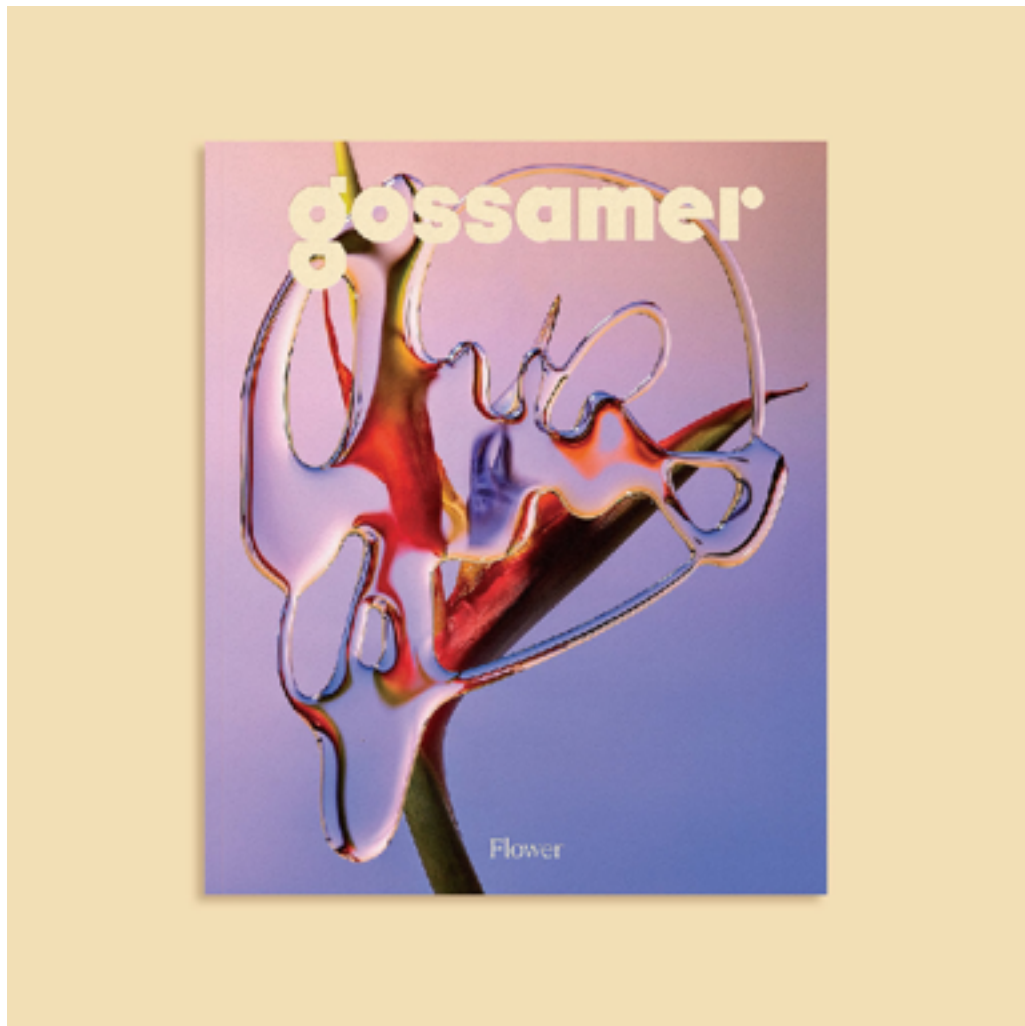
*Consumer interest in sleep support now crosses generations – it’s a top three concern of supplement users aged 18-34 in the US, China and the UK. Covid-19 is exacerbating the issue as stress levels rise and loss of daytime structure disrupts normal sleep schedules.*

## Gossamer

CBD has become a popular tool for relaxation. With its minimalist design and millennial POV, Gossamer is targeting a new generation of smokers with a ‘green lens’ on travel, food and culture. Dusk tincture is their formulation of CBD, CBN, and hand-picked terpenes shown to promote healthier sleep

## D+ for Care

Ingredient-wise, melatonin (a hormone that regulates the sleep cycle) has seen mass-market uptake as have botanicals. Beauty and food & beverage brands are also adopting these ingredients. A new sleep spray from French beauty supplement brand D+ for Care includes melatonin, passionflower and reishi.





# Mental Wellbeing

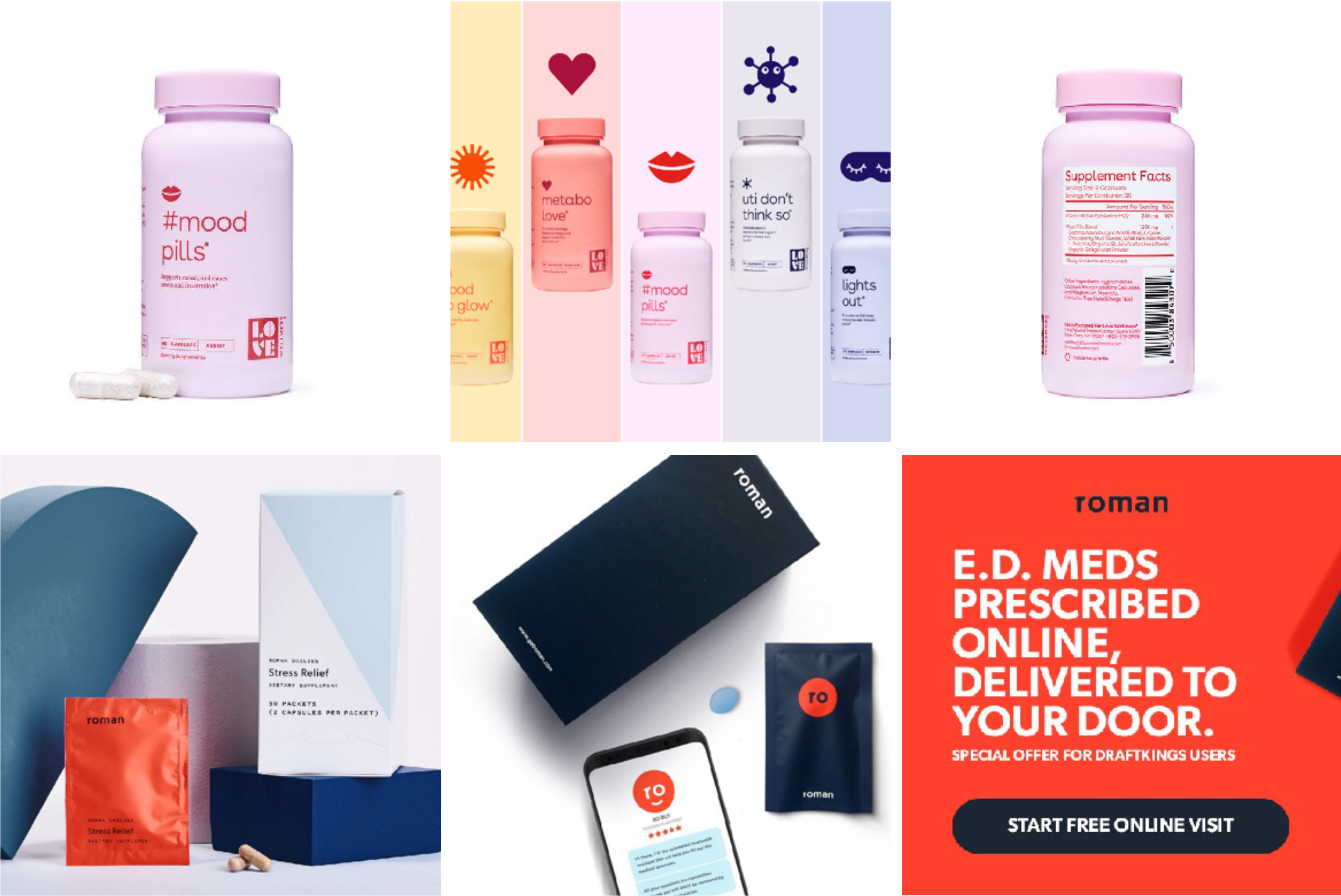
*Stress is skyrocketing, driven by ‘workism’, rising debt and tech-laden 24/7 lifestyles. In the UK, adults recognise the pandemic is impacting their mental wellbeing. Maintaining good mental health is the number one benefit of interest among supplement users aged 18-34 in the US and UK (Glanbia, 2020).*

## Love Wellness

Pre- and probiotics for mood will become more prevalent as researchers chart the gut-brain connection. 1-stop shop for women's wellness and personal care brand Love Wellness has pills with St. John's Wort, and Organic Chasteberry to help 'enhance your mood’.

## Roman

With three natural ingredients, including ashwagandha and Rhodiola rosea, two adaptogenic herbs that traditionally have been used to help lower stress and reduce mental fatigue. And phosphatidylserine, a vital component of nerve cell membranes and myelin, supports cognitive properties like memory, attention, and concentration.





# Mental Wellbeing

## R3set

Launched in March, American supplement brand R3set coats pills with essential oils for olfactory impact. Its Calm day formula, scented with citrus, includes adaptogens like valerian root and ahi flower. The brand complements the product with a 14-day email series on mastering stress.



## Pollen

Adulthood is complicated, and sometimes, even ‘wellness’ feels like a weight. Pollen want to ease the pressure and have created a CBD based brand that is all about those small changes that make you that little bit happier. Living in an age that glorifies ‘busy-ness’, influence and living your best life – means we don’t take time to focus on what actually makes us feel good.





LIFESTYLE  
BENEFITS

USER  
GENERATED  
CONTENT

COVID

CONCLUSION *from*  
FREE THE BIRDS

## COVID DRIVERS

What does this mean for your brand?

## Emphasise broader lifestyle benefits

Communicate wider than product benefits. Brands that acknowledge lifestyle behaviour and create tools to help customers adopt those behaviours are in growth. Consumers increasingly view health holistically, linking lifestyle behaviours such as diet and sleep regimens with mental and physical wellbeing and understanding that by improving just one aspect has a positive knock-on effect. As the key concerns of immunity, insomnia and stress/anxiety are interlinked, position product benefits broadly – for instance, reduced stress improves sleep, while improved sleep strengthens immunity.

***We can work with you to identify and highlight the broader, relevant benefits you may be overlooking?***

## Are you taking UCG seriously?

User-generated content (UGC) has rocketed during the pandemic, due to consumer appetite for authentic inspiration they can relate to. For brands, this content offers invaluable scope because it's possible to furnish a growing suite of touch points with varying content, fast and cheaply. A 2020 study by Australian UGC specialists Stackla revealed 79% of people are influenced by UGC when making purchasing decisions, it is six times more influential than brand-created content and 9.8 times more impactful than influencer content. Spontaneity, credibility and relatability are always going to be more compelling than 'paid for' content.

***What can you do to ensure your brand is talked about?***

## Living with Covid-19

Catering to Future Demand. With the ongoing impact of the pandemic, we know it's a marathon we are dealing with. How can brands ensure they are being as empathetic and supportive as possible? By anticipating what consumers are wanting and needing from healthcare, brands not only build loyalty but can use the insights gathered to fuel the innovation pipeline as well as adapting and adjusting their messaging accordingly.

***Do you need help viewing consumer behaviour from a different perspective? Let's discuss how to approach this.***



# MOTHER NATURE

NATURAL REMEDIES | ANCIENT WISDOM | LIFESTYLE

The supplement industry's focus is shifting toward **herbs** and **botanicals** as consumers embrace plants in all forms.

**Ancient wisdom** and **alternative medicine** are now being viewed through a scientific lens focused on results and evidence, rather than gimmicks.

Younger consumers are especially keen, driven by their growing affinity for plants and trust in age-old approaches and are less likely than their boomer counterparts to take the advice of their doctor.

8.8bn

US sales of herbal supplements shot up by 9.4% YOY in 2018 to \$8.8bn, boosted partly by CBD and mushroom products\*

\*American Botanical Council, 2019

49%

Of millennials express a preference for supplements in non-pill forms\*\*

\*\*Natural Marketing Institute, 2019



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# Natural Remedies

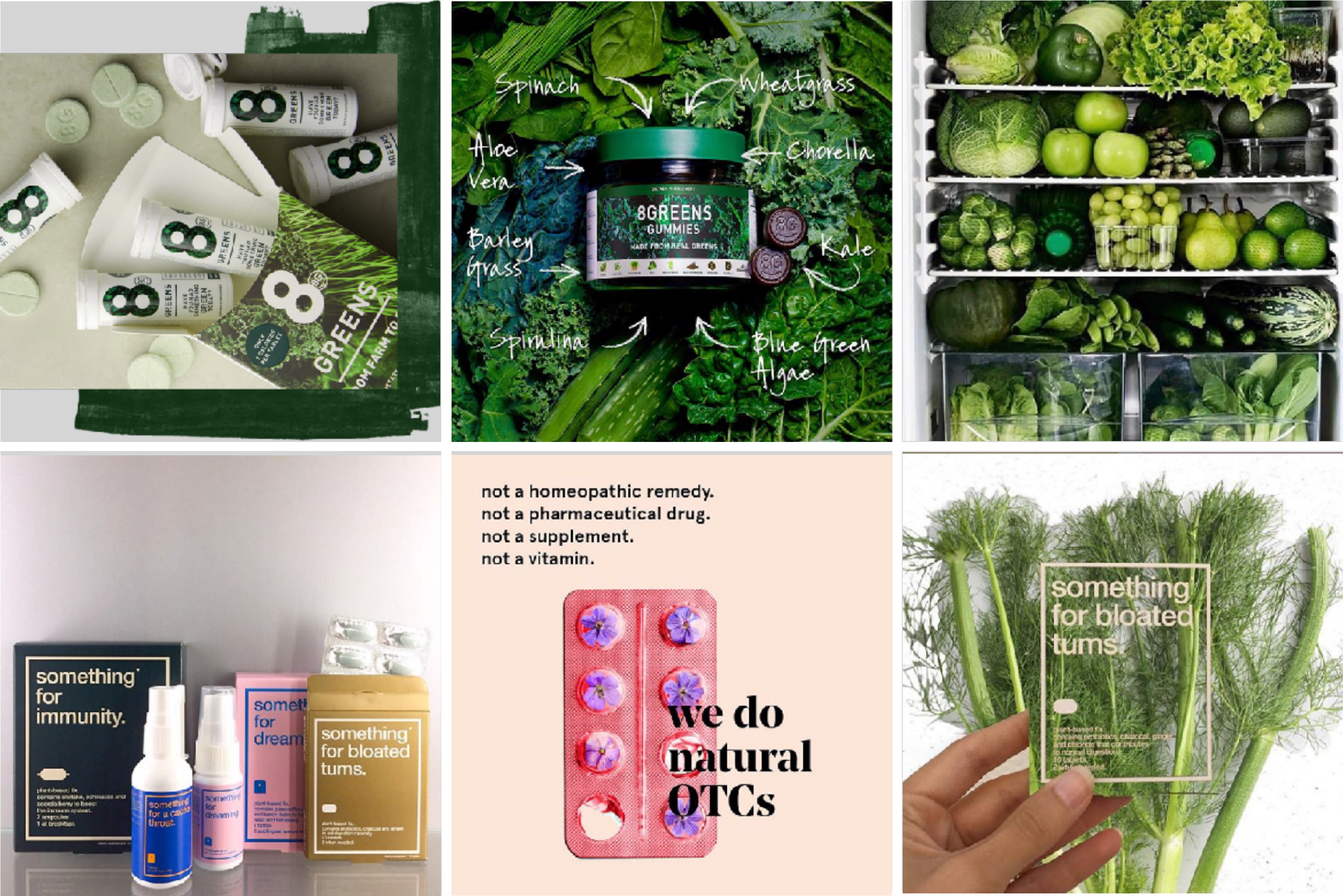
*CRN reports the US herbals and botanicals category grew by 19 percentage points between 2015-19, boosted by younger buyers.*

## 8 Greens

US brand 8Greens targets “people with busy lives, believing that no matter how busy people are, they can improve their health and wellness. One effervescent tablet delivers B5, B6, B12, Zinc & Vitamins C in quantities that would be a challenge to consume daily as fresh produce.

## Biocol

Founded in Lisbon in 1977, Biocol Labs is the post-chemical pharmacy, creating health essentials for modern men and women seeking a natural and efficient lifestyle which they believe is not provided by traditional healthcare. Biocol has the power of minerals and plants at its heart and offers natural OTCs in over 20 countries.





# Ancient Wisdom

*Reverence is growing for age-old plant-based practices — whether based on folkloric traditions, or ancient (especially Eastern) systems like traditional Chinese medicine and Ayurveda.*

## Wthn

Some brands are integrating healing practices with products, like NY acupuncture-studio start-up which sells herbalist-formulated supplements. The name Wthn comes from the belief that we all have the power to heal and thrive from our body’s natural defences and that should be supported.

## Pukka

In 2019, the UK’s National Health Service began testing to see if an Ayurvedic alternative called Andrographis could be provide an alternative to antibiotics for certain infections, using supplements from British brand Pukka.





# Lifestyle

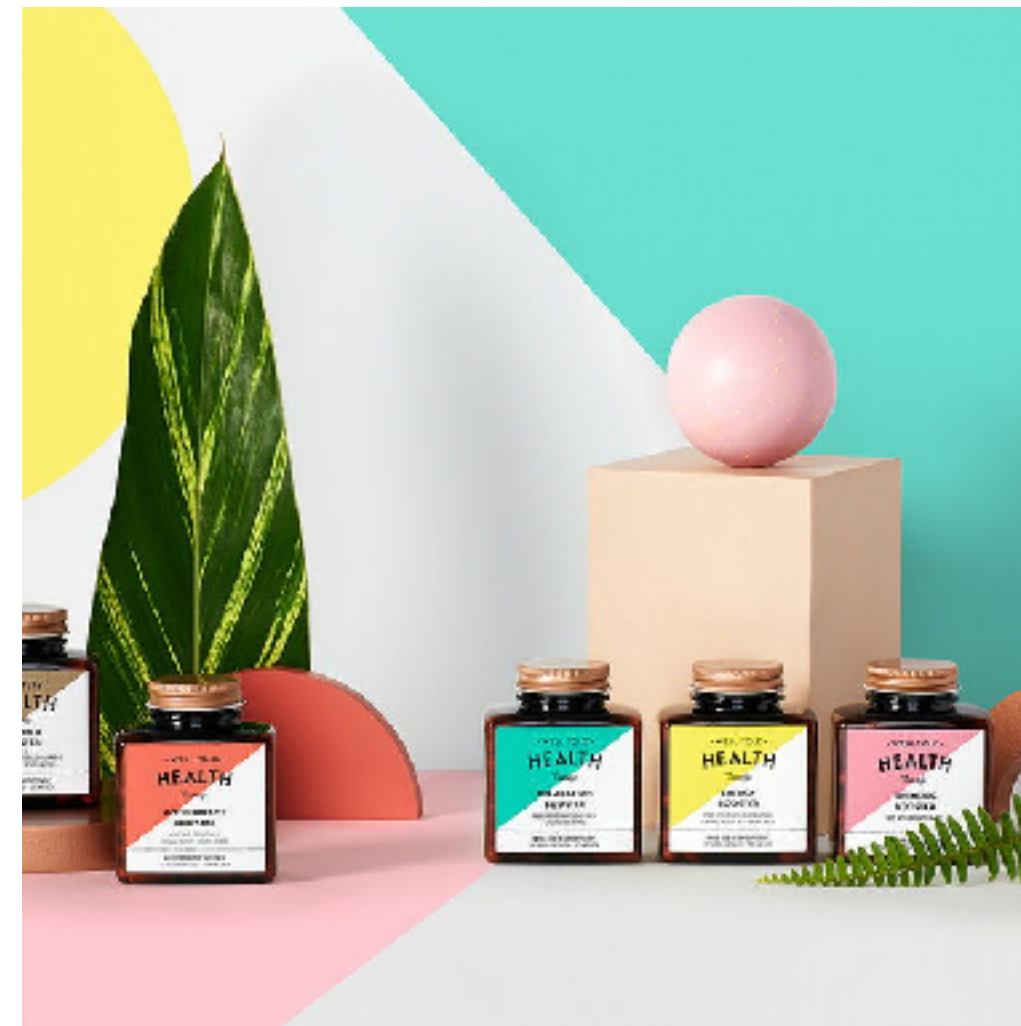
*A new wave of vegan supplement companies position themselves at the centre of a plant-based lifestyle with the benefits clearly signposted through their nomenclature and branding.*

## Well Told

Canadian botanical supplements brand [Well Told](#) includes a recipes page on its website based on key ingredients. Its products are centred on formulations that you either can't get from food alone (such as Vitamin D) or that are impossible to get in sufficient quantities to be therapeutic.

## Moon Dust

Adaptogenic wellbeing brand Moon Dust is committed to transparency with 100% of its bioactive products containing traceable and unadulterated ingredients addressing the needs of consumers by bridging the world of alchemy and biology for functional benefits.





PREVENTION

CROSS  
FERTILISATION

SCIENCE  
& SPIRITUALITY

CONCLUSION *from*  
FREE THE BIRDS

## MOTHER NATURE

What does this mean for your brand?

## Think Prevention rather than Cure

Now a buzzword, with established and new players exploring opportunities in herbals and naturals. We're also seeing this evolution in approach within traditional OTC healthcare. Supplements are well placed as a marker to encourage healthier living and support busy lifestyles. It's far simpler to prevent or keep a condition under control than fix an acute problem or flare up.

***How do you encourage your consumers to embrace your product by immersing it in their busy routines?***

## Think Cross fertilisation

Brands that promote healthy lifestyles have an exciting opportunity to create alliances with other wellness-centric companies, or extend into new categories such as fitness and food themselves. Wthn, for instance, operates an acupuncture studio, and also sells supplements. Also think about multitasking products such as Metta which provides hydration as well as herbal supplementation.

***Who would your ideal collaboration partner be, that fit your ideals and principles?***

## Think Science & Spirituality

Win over the consumer who prizes science and a spiritual element by taking both seriously. Ancient wisdom and alternative medicine are now being viewed through a scientific lens focused on results and evidence, rather than gimmicks.

**Consider how you can demonstrate your proof points, product trials and reviews to reassure consumers of brand efficacy.**



# IN CONTROL

BESPOKE | BIOMARKERS | DELIVERY

The personalisation sector is on track to **explode** and is being fuelled by consumers' rising expectation of **'made for me'** products, and the fast-developing science and technology behind pinpointing and **formulating for specialised needs**. 3D Printing has also made a great impact on customised solutions not only that but DTC cuts out the retailer and benefits both the brand and consumer from an efficiency perspective.

\$281m to  
\$4.3BN

The personalisation sector is on track to explode into a \$4.3bn US industry by 2023, from an estimated \$281m in 2019\*

\*Stylus: New Hope Network 2020

80%

More than 80% of the 50+ start-ups in this space rely on consumer questionnaires to customise daily packs of vitamins and supplements\*

\*CB Insights



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# Bespoke

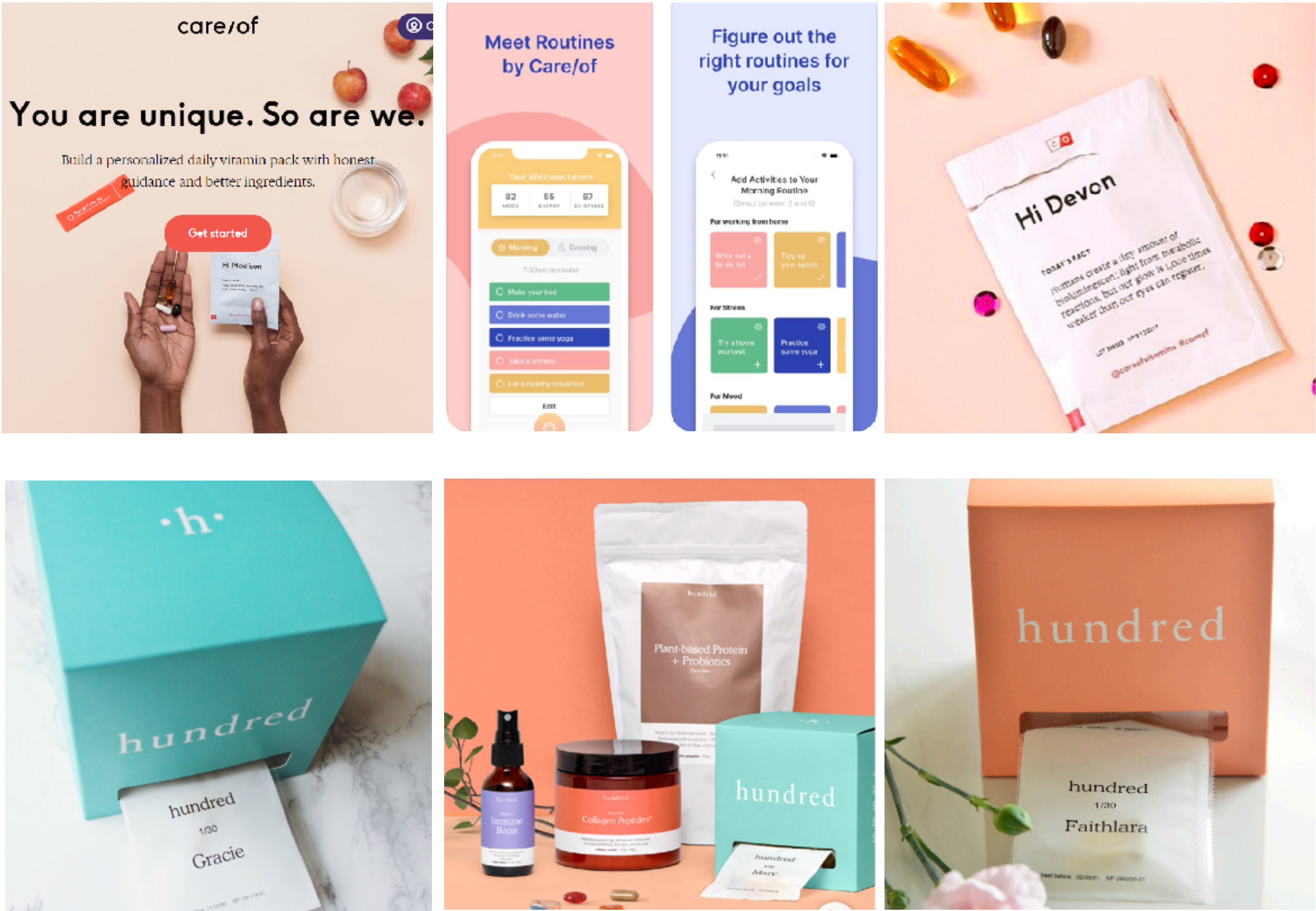
*Most companies elevate personalised supplements to Instagrammable status by labelling packaging with recipients’ names.*

## Care/Of

In March, NY-based supplement-subscription brand Care/of launched Routines, an app for creating personalised wellness routines, setting reminders for healthy habits, and logging results. Care/of also rates supporting research on a spectrum from “limited” to “very strong” – indicating, for instance, where larger-scale studies are still needed. Pharmaceutical company Bayer AG has agreed to buy a majority stake.

## Hundred

Natural vitamins designed for lasting energy, improved sleep, and more. Founder Darios’ motivation was to disrupt the lack of transparency amongst the biggest industry players and to create a better solution that brings results and clarity to a world of complex vitamins and false claims.

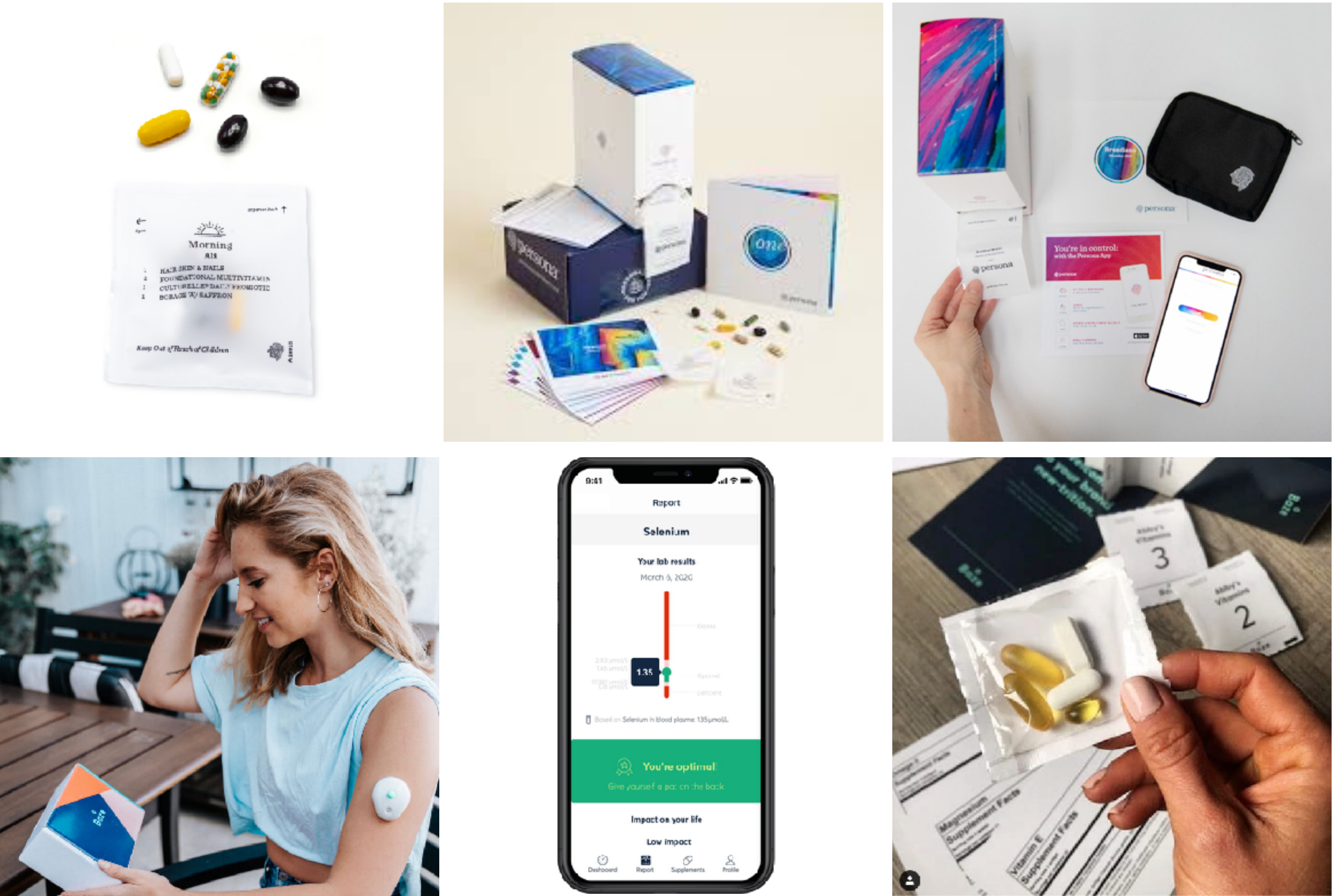




# Bespoke

**Persona’s** Medical Advisory Board is made up of 5 Doctors, 3 Registered Dietitians, 8 Nutritionists and a Doctor of Pharmacy who have seen over 100,000 patients in their careers. Using their combined professional expertise and drug-nutrient interaction research, they build personalised recommendations for consumers based on their unique needs, lifestyle and history. Purchased in 2019 by Nestlé Health Science demonstrates commitment by big business to personalised supplements.

**Baze** believe truly personalised nutritional support starts with the simple blood test unit they supply. From that analysis, an in depth report is produced and specific supplements alongside dietary changes are recommended to give clear direction towards optimal health.





# Biomarkers

*A smaller but more future-facing group of companies base personalisation on individual biomarkers, targeting self-tracking fiends.*

## Vitl

London supplements brand Vitl offers DNA tests as well as blood-sample kits (for measuring vitamin and cholesterol levels). “Consumers aren’t just looking for data, they’re looking for it to be actionable and want a solution in one place,” says founder Jonathan Relph.



## Sun Genomics

In the microbiome space, San Diego-based Sun Genomics analyses customer stool samples to create custom probiotics through its Floré brand, promoted as improving digestion, energy and bloating issues.





# Next Gen Delivery Systems

*Some start-ups combine two trends in one, making personalised products in alternative formats.*

## Rootine

US start-up Rootine uses DNA, blood and questionnaire data to formulate customised supplements in microbeads. Rootine says the microbeads – which can be swallowed en masse as pills or sprinkled on foods like yoghurt – enable optimal absorption throughout the day.



## Nourished

UK subscription company Nourished is betting that its patented 3D printing technology can make customisable multivitamins a mass-market reality. Consumers choose from pre-selected formulations. Each coloured stripe within the visually striking gummies contains a different nutrient.





# Next Gen Delivery Systems

*Consumers’ ‘pill fatigue’ is propelling the rise of increasingly creative and efficacious formats.*

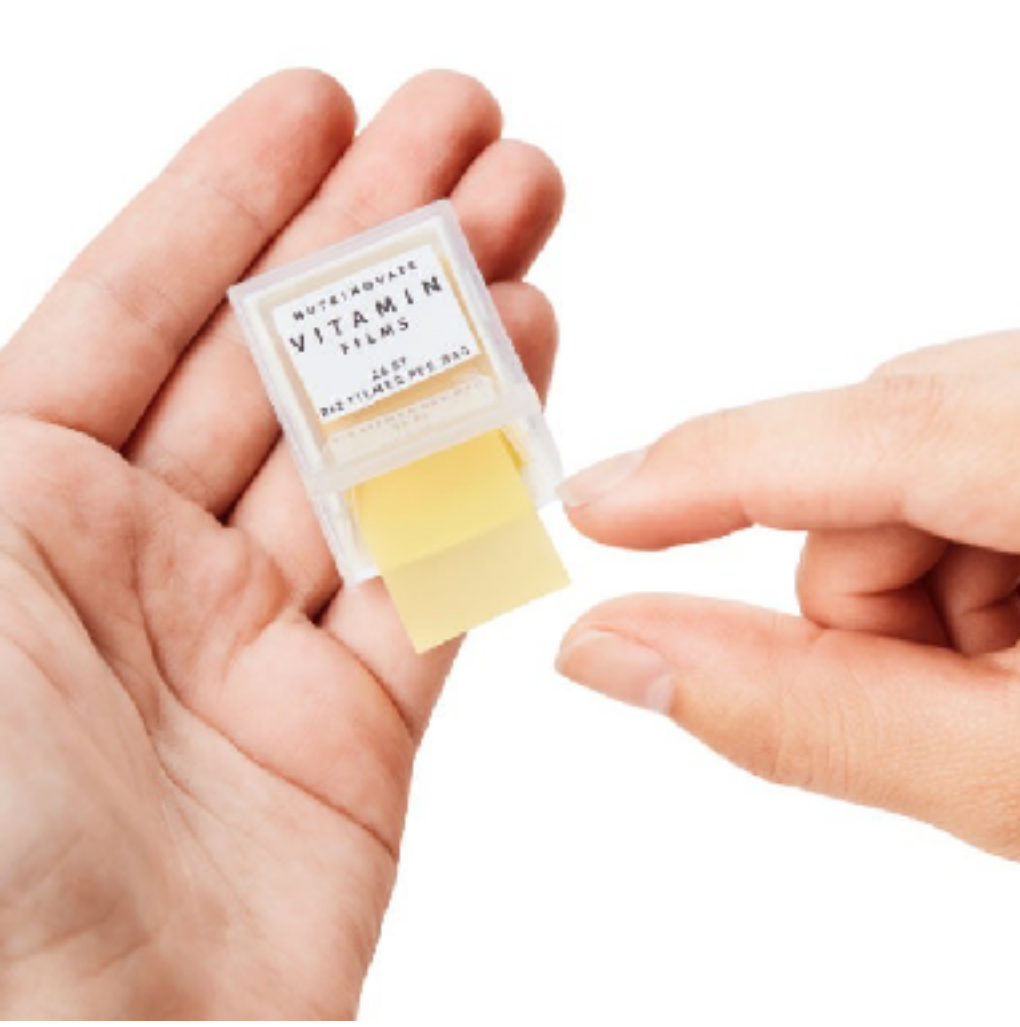
## Sparq

Sparq Vitamin Air™ is the world’s first eco-friendly vitamin inhalation device that replaces nicotine and harmful chemicals with lab-tested vitamins, amino acids and botanicals. The start-up ran a crowdfunding campaign on Indiegogo in December 2018 and raised \$108,000, an incredible 584% over its target.



## Nutrinovate

For those on the go - Swedish company Nutrinovate’s Vitamin Films enable the rapid absorption of ingredients into the bloodstream

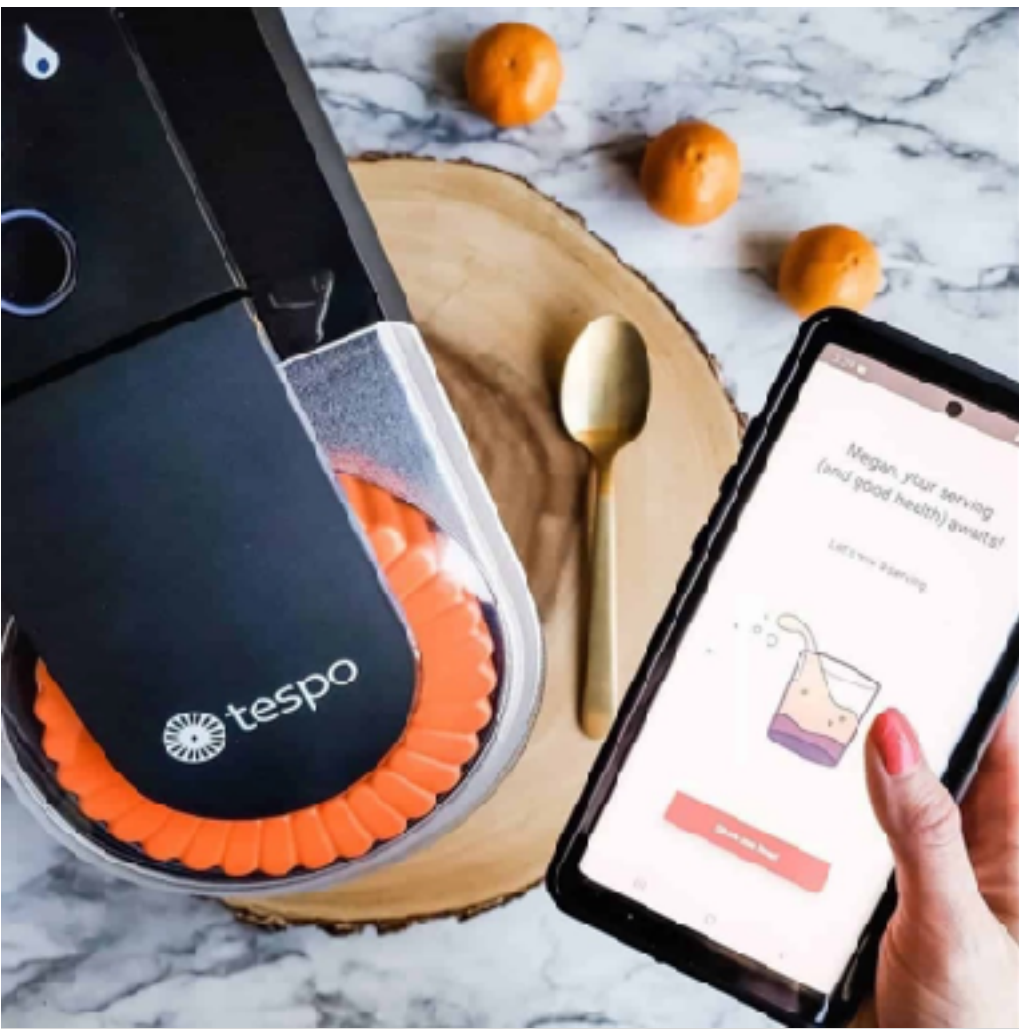




# Next Gen Delivery Systems

## Tespo

Fully connected to track your results, Tespo is a vitamin dispense system, delivering bespoke or ready formulated vitamin pods that are made up into a shot through the dispense machine. For those that find swallowing tablets difficult or want to avoid the fillers and bulking agents found in other vitamin products.



## Metta

Supplements are now becoming indistinguishable from food and drink products. One such example is Canadian sports-drink brand Metta which labels its adaptogen-filled cans a “herbal supplement,” recommending two cans daily.





## IN CONTROL

What does this mean for your brand?

### Be Empowering

As Vitl is providing, entrusting a brand with your personal health data is no mean feat. The payback for consumers is a much deeper understanding of their health status and clear direction as to how to improve it from both a physical and digital tracking perspective. Not only is this felt to be easier and deliver speedy a response it ensures ongoing engagement with the brand. It also encourages deeper consumer engagement through consumers being more invested and as such, usage has shifted from being a chore to a habit.

***How can you make data actionable, trackable and in turn help to reinforce compliance?***

### Be Transparent

Supplement start-ups are detailing and sharing sources, studies, and suppliers in simple terms, and explaining how the product fits within a broader health context. They are also being very transparent with clinical research and how established it is. Where does this leave heritage brands, how can they pivot and shake off their previously held 'authority position' and engage on a one to one level?

***How you can better engage and foster trust with consumers?***

### Be Personal

The growth of personalised supplements shows consumers are seeking products that not only remove the need for research and guesswork but educate consumers along the way about their own health, the benefits of supplements but also what will address their individual needs the most. Beyond the personalisation category, this suggests an opportunity for niche products within broad categories like immunity and sleep support, targeting concerns specific to ages and stages.

**How can your innovation pipeline address specific needs of consumers to give them the control they crave?**

BE  
EMPOWERING

BE  
TRANSPARENT

BE  
PERSONAL



## CONCLUSION

# AT A GLANCE

## COVID DRIVERS

### Emphasise broader lifestyle benefits

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# Here to help

We hope you found our gathering of insights and opportunities helpful. Please get in touch with us to arrange a time to discuss how we can elevate your brand.

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**ftb.**  
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