“The strong focus on diet for health benefits and the growing availability of fortified and functional food and drink present major challenges for the VMS market, making it even more important for products to create compelling standout.”

– Emma Clifford, Associate Director – Food and Drink

This report looks at the following areas:

- Organic products, fun formats with exciting flavours and vitamins/supplements tailored to individual needs are all areas of opportunity.
- Big opportunities in personalised supplements for gut health
- Ingredient provenance and organic are underexplored opportunities
- Scope for more exciting flavours and formats

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market
Vitamins and Supplements - UK - September 2019

Table of Contents

Overview

What you need to know
Products covered in this Report

Executive Summary

The market
Value sales stagnate in 2019
Value growth set to return

Figure 1: Best- and worst-case forecast of UK value sales of vitamins and supplements, 2014-24

Products with specific functions see biggest decline
Direct selling sees growth
Recent scientific research may fuel consumer scepticism
Fortification makes healthy diets easier
The rise of plant-based diets has important implications

Companies and brands
Wellkid/man/teen/woman brands maintain their marginal lead, own-label loses share

Figure 2: Share of UK retail value sales of vitamins and supplements, by brand, 2017/18 and 2018/19

Tablets become less prevalent in NPD
Half of launches are now botanical/herbal
An uplift in products with beauty benefits in 2019
The decline in adspend levelled off in 2018
Healthspan and Berocca take new approaches to advertising
Seven Seas has the strongest all-round positive image

The consumer
Daily usage of vitamins, minerals and supplements is high

Figure 3: Usage of vitamins and supplements in the last 12 months, June 2019

Multivitamins are most popular
Lifestyle changes impact usage

Figure 4: Usage of vitamins in the last 12 months, June 2018 and June 2019

Usage of glucosamine rises, linked to positive media coverage

Figure 5: Usage of minerals and dietary supplements in the last 12 months, June 2018 and June 2019

Supporting general health is top motivation
Gut health is more important

Figure 6: Reasons for taking vitamins and supplements, July 2017 and June 2018

Personalisation and home testing kits attract strong interest
Demand for greater transparency around ingredient origin

Figure 7: Behaviours relating to vitamins and supplements, June 2019

The concept of ‘beauty from within’ chimes

BUY THIS REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com
Under-35s deem organic products to be superior

Usage of vitamins/supplements containing CBD is high among under-45s

Easing pain, aiding relaxation and improving sleep are most commonly associated with CBD

What we think

Issues and Insights

Big opportunities in personalised supplements for gut health

The facts

The implications

Ingredient provenance and organic are underexplored opportunities

The facts

The implications

Scope for more exciting flavours and formats

The facts

The implications

The Market – What You Need to Know

Value sales stagnant in 2019

Value growth set to return

Products with specific functions see biggest decline

Direct selling sees growth

Recent scientific research may fuel consumer scepticism

Fortification makes healthy diets easier

The rise of plant-based diets has important implications

Demographic changes will act to both help and hinder the category

Real incomes have been thriving

Market Size and Forecast

Value sales stagnant in 2019

Figure 11: UK retail value sales of vitamins and supplements, at current and constant prices, 2014-24

Value growth set to return

Figure 12: Best- and worst-case forecast of UK value sales of vitamins and supplements, 2014-24

Forecast methodology

Market Segmentation

Products with specific functions see biggest decline

Figure 13: UK retail value sales of vitamins and supplements, by segment, 2017/18-2018/19

Channels to Market

Direct selling sees growth
Vitamins and Supplements - UK - September 2019

Figure 14: UK retail value sales of vitamins and supplements, by outlet type, 2017 and 2018

Market Drivers

Mounting competition from healthy diets
- Figure 15: Share of food and drink launches carrying vitamins/mineral fortification and functional claims, 2015-19

Fortification makes healthy diets easier
Multivitamin controversy
The rise of plant-based diets has important implications
The market is slow to react to the war on plastic
CBD reclassified as a novel food
Ageing population benefits the market
Decline in birth rates and child population is a threat
- Figure 16: Trends in the age structure of the UK population, 2014-19 and 2019-24

Real incomes have been thriving
- Figure 17: Annual percentage change in CPI and AWE (regular pay), monthly basis, January 2013-June 2019

Companies and Brands – What You Need to Know

Wellkid/man/teen/woman brands maintain their marginal lead
Own-label loses share
Tablets become less prevalent in NPD
Half of launches are now botanical/herbal
An uplift in products with beauty benefits in 2019
The decline in adspend levelled off in 2018
Healthspan and Berocca take new approaches to advertising
Seven Seas has the strongest all-round positive image

Market Share

Wellkid/man/teen/woman brands maintain their marginal lead
Own-label loses share
- Figure 18: UK retail value sales of vitamins and supplements, by brand, 2016/17-2018/19

Bassetts benefits from NPD

Launch Activity and Innovation

Tablets become less prevalent in NPD
- Figure 19: Share of launches in the UK vitamins and supplements market, by format, 2015-19

More activity in gummies ...
- Figure 20: Examples within the Gumi range, 2018
... particularly in the beauty space
A very fragmented NPD landscape
- Figure 21: Share of launches in the UK vitamins and supplements market, by top 15 companies (sorted by 2018), 2015-19

Vitabiotics extends Wellkid Peppa Pig range with new Pro-tummy variant
Seven Seas launches news JointCare products
Brands dominate launch activity, but share slips slightly in 2018

Half of launches are now botanical/herbal

Significant growth potential within all-natural NPD

Vegan claims are popular in 2019

An uplift in products with beauty benefits in 2019

Sleep and stress attracts more NPD attention

Fermented food trend crosses over into the VMS market

The decline in adspend levelled off in 2018

Healthspan and Berocca take new approaches to advertising

Healthspan put the focus on provenance in 2019 ad campaign

Berocca launches ‘No Day Too Tough’ campaign with branded TV content

Lemlift TV ad centres on the effects of a horrible winter commute

Seven Seas teams up with celebrities

A rise in digital adspend in 2018 and 2019

Nielsen Ad Intel coverage

Brand Research

Brand map

Key brand metrics

Brand attitudes: Seven Seas stands out on trust and quality perceptions

Brand personality: Bassetts has the most fun image

Centrum and Seven Seas lead associations with being expert and effective

Brand analysis

Well Kid/Man/Teen/Woman headline

Centrum leads brand satisfaction
Seven Seas has the strongest all-round positive image

Berocca lags behind on expert associations

Bassetts is most likely to be seen as fun and youthful

Perfectil has limited awareness and uptake, but a committed user base

Daily usage of vitamins, minerals and supplements is high
Multivitamins are most popular
Lifestyle changes impact usage
Usage of glucosamine rises, linked to positive media coverage
Supporting general health is top motivation
Gut health is more important
Personalisation and home testing kits attract strong interest
Demand for greater transparency around ingredient origin
The concept of ‘beauty from within’ chimes
Under-35s deem organic products to be superior
Easing pain, aiding relaxation and improving sleep are most commonly associated with CBD

Over a third are occasional or lapsed users, linked to competition from healthy diets
Usage varies significantly by age and gender
Presence of children drives usage
Financial health is a major factor
Multivitamins are most popular
Lifestyle changes impact usage
Usage of glucosamine rises, linked to positive media coverage

Supporting general health is top motivation
A decline in young adults taking VMS for this reason

Gut health is more important

Brain/nervous system claims are most important to male under-35s

**Behaviours Relating to Vitamins and Supplements**

- Personalisation attracts strong interest
  
  Figure 47: Behaviours relating to vitamins and supplements, June 2019

- Interest in home testing kits is high

- Demand for greater transparency around ingredient origin

- Scope for more exciting flavours and formats

**Attitudes towards Vitamins and Supplements**

- The concept of 'beauty from within' chimes
  
  Figure 48: Attitudes towards vitamins and supplements, June 2019

- Yet low usage of VMS with appearance benefits

- NPD centring on appearance is gathering momentum

- Under-35s deem organic products to be superior
  
  Figure 49: Agreement with attitudes towards vitamins and supplements, by usage of vitamins, minerals or dietary supplements, June 2019

**Usage and Perceptions of CBD**

- Awareness of CBD is high ...
  
  Figure 50: Awareness of cannabidiol (CBD), by age, June 2019

  ... as well as usage
  
  Figure 51: Usage of vitamins/supplements containing CBD, by age and gender, June 2019

- Easing pain, aiding relaxation and improving sleep are most commonly associated with CBD
  
  Figure 52: Perceptions of vitamins/supplements containing CBD, by usage of CBD supplements, June 2019

**Appendix – Data Sources, Abbreviations and Supporting Information**

- Abbreviations

- Consumer research methodology

**Appendix – Market Size and Forecast**

- Figure 53: Best- and worst-case forecasts for the total UK vitamins and supplements market, by value, 2019-24

- Forecast methodology