



ITC INSIGHTS: DIETITIAN SURVEY 2020 EXECUTIVE SUMMARY

COLLAGEN CATEGORY

EXECUTIVE SUMMARY



What is the ITC 2020 Dietitian Survey?

The Ingredient Transparency Center recently concluded its third annual dietitian survey, involving 200 dietitians across the United States. Our multi-category insights drive understanding of supplement use and recommendation behaviors by this key stakeholder group with an intense focus on emerging and important categories, placed into context by comparing these against more established and broader categories like probiotics, omega-3s and vitamin D.

The emerging categories explored include astaxanthin, coenzyme Q10, collagen, curcumin/turmeric, glucosamine, prebiotics and vitamin K.

We've also looked at year over year data and some findings have been impacted by COVID which are noted.

Who are these dietitians?

In early summer 2020, ITC surveyed over 200 dietitians across the United States. In general terms, the dietitians divided into groups based on a few over-arching criteria and these separations became part of the processing and analysis. The report is organized into general cross-category responses and insights, followed by a deep dive into ITC core categories.

Primary comparisons include:

RECOMMENDATION APPROACH

'Food first' practitioners, those dietitians that strongly favor food solutions, but will, from time to time recommend supplements vs. 'mixed food and supplement' dietitians, who pretty much equally look to both food and supplement in their dialogue with their patients.

WORK ENVIRONMENT

Practice dietitians who see more patients in a one-on-one consultative fashion, vs. institution dietitians. Both groups here do provide supplement recommendations, but the patterns differ significantly in many cases.

AGE

Additional data and insights are provided throughout the report based on the age of the dietitians. What they take, what they look for and what they recommend – all are influenced in part by the age of these respondents.

Digging into collagen:

In 2020, recognizing the explosive growth and hype surrounding collagen and collagen products, the Collagen Stewardship Alliance (CSA) was formed to steward this fascinating category and category intelligence from this group is incorporated throughout the report.

Approximately 80% of the skin's dry weight is collagen so beauty-from-within and healthy aging skin health supplements are largely responsible for driving this category in solid double digit amounts but joint health, weight management and sports and active nutrition are also highly substantiated health benefits from collagen products, and this is an emerging area of interest and potential market expansion, especially amongst the community surveyed.

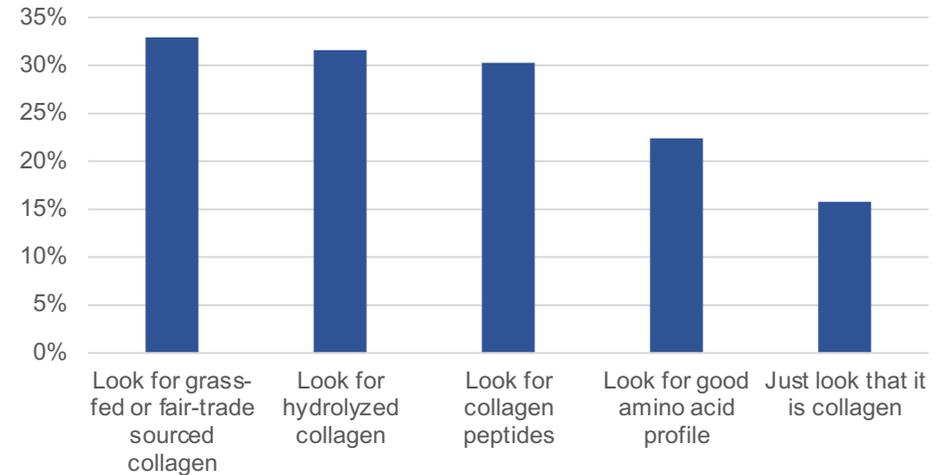
As is the case with any accelerating category, collagen awareness is certainly rising quickly, yet there is a temptation to allow the rhetoric and marketing to get ahead of the science, and potential for confusion to exist in the market and with consumers. This too is true in this category where types, sources and supply chain all bear on efficacious products being brought to market. For the dietitian community, collagen is not really that strong a recommendation with a split between skin/beauty benefits and collagen as a protein source being the driver of recommendation for many.

Collagen's role in weight management, body toning and muscle performance and recovery-focused concerns is quite clear and social media is a major driver of collagen upsurge. This acceleration and broadening of perceived and possible health benefits does represent a newer opportunity, so this space should be watched.

Collagen Types I, II and III form the bulk of the collagen in the human body. Types I and III provide structure to the skin, muscles and ligaments, while type II is found in cartilage and the eye. This can cause market confusion and to ensure continued category success, education and proper attribution of science are critical factors.

Most dietitians suggest that for those patients for which they do recommend collagen that they just look for that ingredient. Fewer recommend by type of collagen, some recommend by source.

What do Dietitians Look For? Top 5



It should be noted, that while current ITC Insights work only surveys supplement recommenders, rather than foods and beverage users, many of the findings do translate across all markets of functional food and drinks.

Overall awareness of collagen, in addition to what collagen recommending dietitians look for on product labels clearly gives insights into broader consumer understanding and marketing tactics.



The growing market opportunity

The global market for collagen is growing at about 10% and set to hit \$1bn in 2021 according to some market estimates although they vary depending on whether adjacent ingredients like gelatin are included along with applications like pharmaceuticals and medical devices. *Nutrition Business Journal* puts the US collagen supplements market at about \$300m in 2020 – up from just \$50m in 2014 – and is expected to reach \$400m by 2022.

On the supply side of this market, companies such as Biocell, Bioiberica, Gelita, Lonza and Rousselot all supply highly differentiated proprietary ingredients with solid scientific support. Much of the balance of the marketplace is composed of largely commoditized, poorly characterized products.

A growing value proposition

There is a solid value proposition with collagen, in that sustainable sources and transparent suppliers are of interest to recommending dietitians.

Future drivers of this category must include broad education, learned from categories such as omega-3's, probiotics and even to a certain extent, vitamin D. There is much work to be done with collagen amongst dietitians including both broader and deeper science, identification and outreach to key influencers, and a measured approach as the science continues to build. To target this dietitian influencer community, an understanding of beliefs and behaviors is critical, including how these dietitians want to be interacted with and where they go for information and education. However, hitting that sweet spot of engagement is doable, and smart marketers are increasingly seeing dietitians as a strategic target. The ITC findings validate this approach.



Questions?

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