ITC 2021 Global Collagen Report

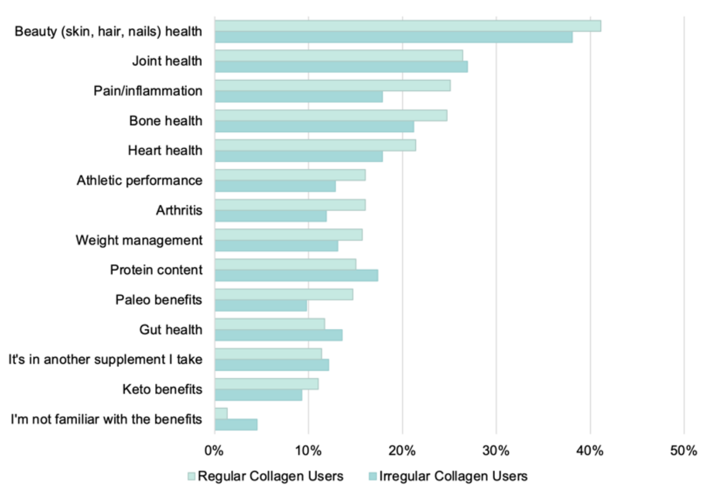
EMERGING SUPPLEMENT INGREDIENT CATEGORIES IN THE US, UK, AND GERMANY

Report size and format: 267 slides with supporting data; report provided as PDF and PPT

The global supplement marketplace has recorded a banner year of growth as consumers have made personal health and well-being an increasing priority. This global market has surpassed $170 Billion, with the United States alone topping $55 billion (Source NBJ). Growth has been broad, ranging from dramatically increased awareness and consumption of traditional staples such as multivitamins and vitamin D, to less known and less ubiquitous ingredients such as elderberry to emerging ingredients such as astaxanthin and vitamin K2. This growth has also spread across categories, ranging from overall wellness to immunity health to active nutrition and even vision health. Benefiting from both the personal wellness surge and a broader appreciation of the widespread benefits of collagen in nutri-beauty, active nutrition and healthy aging, the collagen category continues its rise in popularity and growth.

This 2021 ITC Insights Consumer Supplement User Collagen report, fielded in Spring 2021, walks readers through dietary and food supplement consumer buying behaviors and priorities across the US, UK, and Germany. It measures how behaviors have changed over the past several years, especially 2019 and 2020. The survey includes 1,000 US, 500 UK and 500 German consumers, all of whom use supplements to some extent and shares insights into their health issues and concerns, their familiarity with the industry and category, what they look for when purchasing collagen containing products and where and why they buy the products they do - for themselves and their families.

Table 1 Reasons They Take Collagen



Within the included extensive charts, viewers can see drivers of purchase and trust, influences and impactors, over-arching education and market gaps that will lead to opportunities. The report starts with a broad assessment of several ingredient categories, measuring broad behavior and behavior changes including vitamin D, probiotics and omega-3s. Using these well-developed categories as benchmarks, the data set then digs deep into collagen, collagen consumers and how these specific users value trust, transparency, sustainability and branded ingredients within the category.

Within the analysis, ITC has filtered the view based on age (for the purposes of this survey, the groups are 18-35, 36-45 and 46+), gender, and frequently the behaviors of regular versus irregular users. For ITC purposes, regular users are those that take a particular supplement more than 4 times per week.

ITC Insights are provided to complement most charts and highlight the pertinent observations from our team. Where we have determined there is a demographic or category over- or under-indexing and where collagen users differ markedly from general supplement users, we have dived deeper. Current macro-trends like sustainability and transparency and other parameters such as product attributes and labels have been specifically investigated across the three geographies and amongst the age and gender splits.

Increasingly, and borne by the ITC results, supplements are part of the overall health and wellness solution set of most consumers, and this is especially so during the current pandemic, especially with categories of ingredients such as collagen. Over the past few years, even as in store purchasing has diminished in importance, channels of sale have propagated. Consumers across the board are buying more supplements through multiple channels and increasing spending. We see the emergence of two broad themes - in the US, supplements as part of a treatment that encompasses allopathic medicine, and in Europe, a much more forward-thinking natural wellness regimen - with health condition target outcomes and concerns matching this split.

Trust is elusive, but valued where it is found
In nearly all supplement categories, the highest lifetime value consumers are captured young, and use products more than 4 times per week (ITC Regular Users). Across the board, the 2021 ITC results show that these consumers are ready and willing to engage, are motivated in part by clinical science and sometimes less so by their health care practitioners, and that they highly value transparency and will pay more for branded ingredients included in their finished products. With collagen containing products, the middle age group (36-45) is a demographic that cannot be ignored and is hungry for more information.

The 2021 report also investigates what attributes consumers are willing to pay more for, including branded ingredients, and specifically what attributes of branded ingredients. Most of the emerging categories and especially collagen show high enough elasticity to support a healthy margin for everyone, especially for the most transparent finished brands. And when it comes to labels themselves, not all information is valued equally - among geographies, age groups and even gender.

Other notes and how to interpret and use this report:

- This report is provided as a PDF and PowerPoint. At any time, purchasers can right click in the PowerPoint slide to obtain supporting data.
- The footers at the bottom of each slide describe the user/respondent set and numbers, and where helpful, the exact question asked.
- For questions that have answers that vary by degree, such as 'frequently' and 'often' or 'extremely' and 'very' types of answers, these will typically be grouped as Top 2 or Top 3 and this will be noted in slide footers.

Use this ITC report and these insights to:

- Get a jump on the competition with strategic and actionable intelligence
- Validate assumptions, strategy, investments and priorities
- Partner better with your customer set to win in your target market sectors
- Meet your consumers exactly where they are going

Please visit TrustTransparency.com/insights to learn more or contact TTC Project Specialist Zoe Georgouses: zoe@trusttransparency.com.