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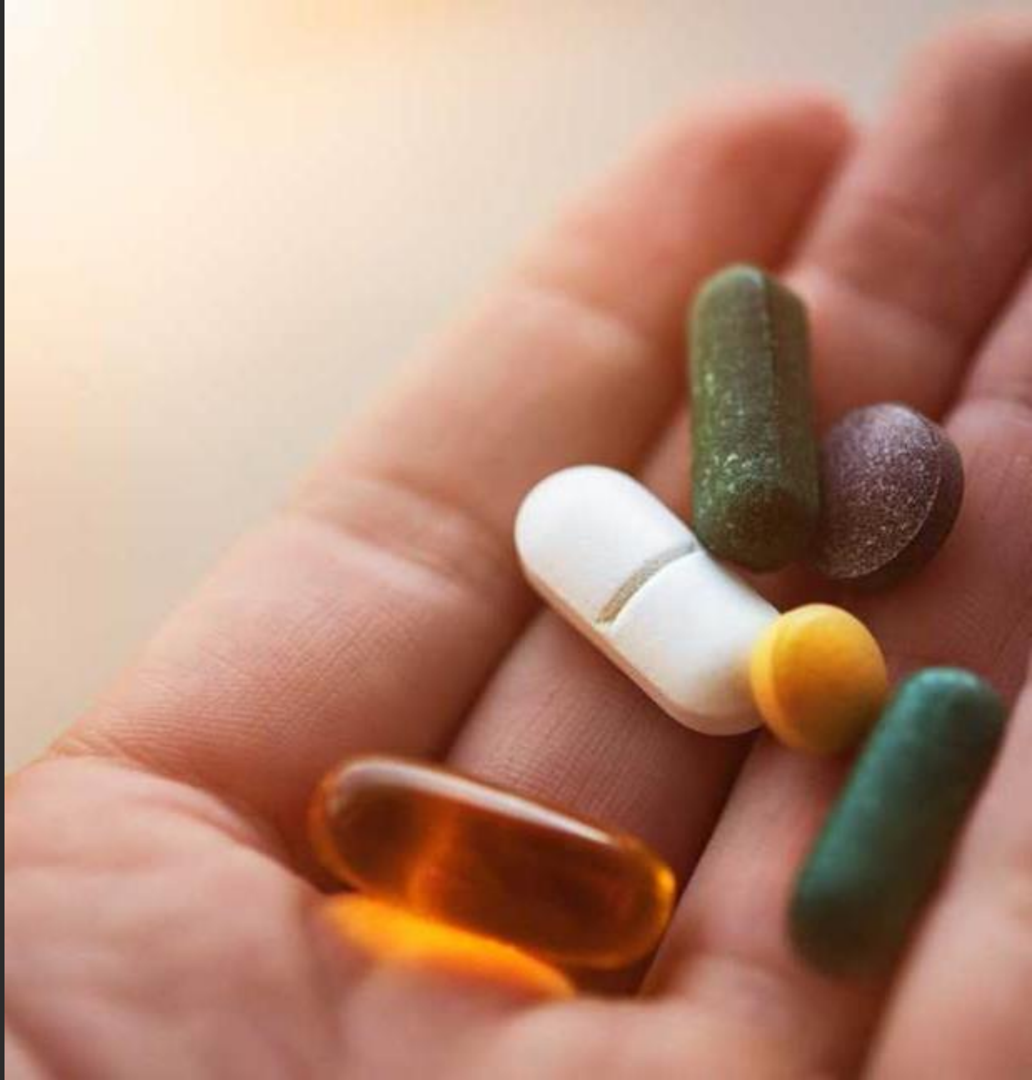
State of the industry update: VMS trends & developments, 2025 and beyond (Executive Summary)

Commissioned by dsm-firmenich
August 2025

Experts in what consumers want and why



This report was commissioned by dsm-firmenich and produced by Mintel in collaboration with dsm-firmenich.

The scope and focus areas were defined in consultation with dsm-firmenich, leveraging dsm-firmenich 's internal consumer insights and business context used in this report to guide relevance.

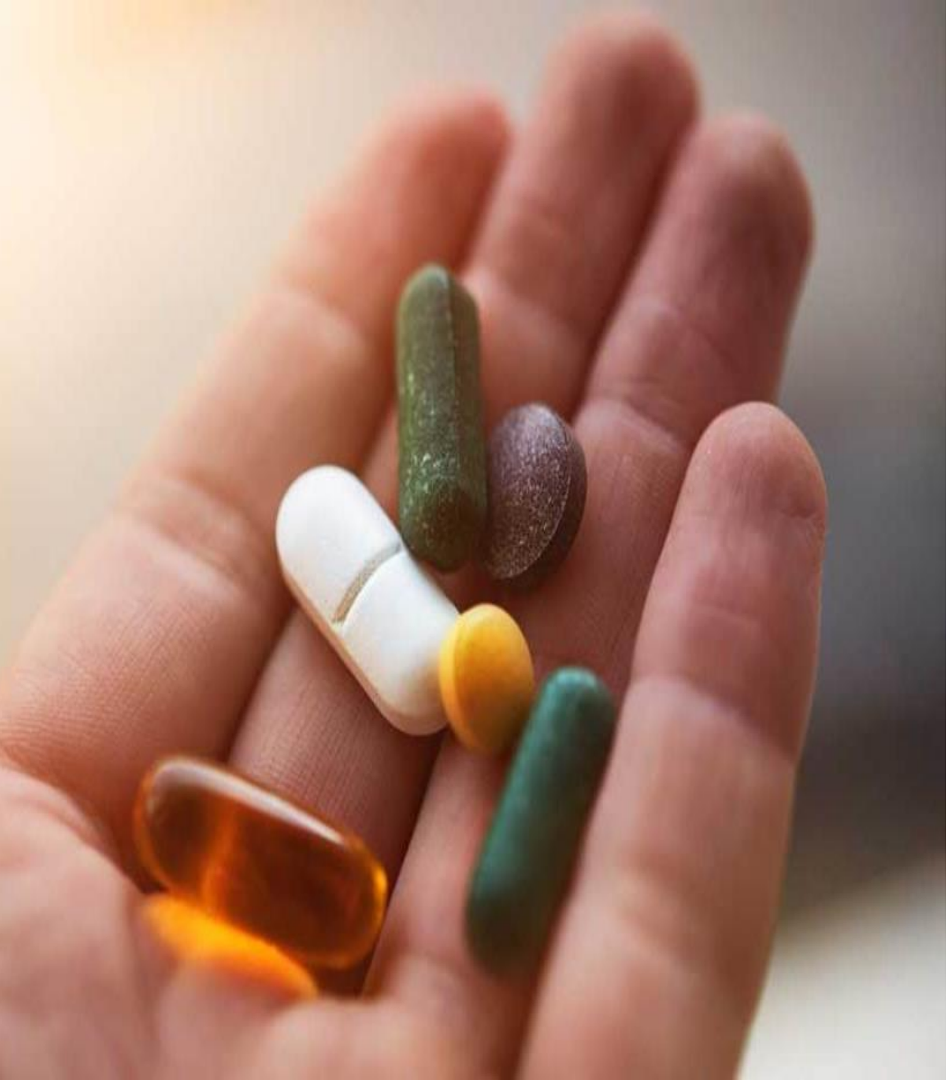
The analysis, trend mapping, and opportunity identification were independently developed by Mintel, drawing on proprietary data*, public sources, and expert interpretation.

This report offers a neutral, forward-looking perspective on category and innovation dynamics. It is not intended as an endorsement or promotion of specific products or formulations.

Executive Summary

What you’ll learn:

- The health and lifestyle shifts driving VMS demand today
- Regional growth hotspots and untapped white space opportunities
- How science, ingredients, storytelling, and format innovation shape consumer appeal
- The role of advanced formulations and delivery systems in market differentiation



Driving innovation in the APAC VMS market

The global Vitamins, Minerals, and Supplements (VMS) market is undergoing a dynamic transformation, driven by an increasing focus on preventive health and personalized wellness solutions.

Trending concepts and science-led solutions is uniquely positioned to tap into these evolving trends by leveraging its science-backed credibility and innovative delivery formats designed for modern lifestyles.

This presentation highlights critical market dynamics, emerging consumer priorities, and strategic opportunities to position dsm-firmenich as the partner of choice in the global VMS sector.

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VMS: strong momentum globally, surge in apac

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As global growth in VMS surges, APAC is uniquely positioned to lead the next wave—not just through scale, but through innovation tailored to diverse market maturity and evolving health priorities."

- VMS is among the fastest-growing supplement categories globally, with particularly high momentum in **APAC**.
- **Emerging markets** (e.g., Indonesia, Thailand, India) are the key drivers of growth, fueled by rising health awareness, retail access, and a shift to **preventive care**.
- While **mature markets** (e.g., South Korea, Japan) are plateauing, they remain critical for premium, personalized innovations.
- **South Korea and China** lead in product innovation; **Japan** shows signs of saturation.

Growth Momentum: Past vs Future (CAGR in local currency)

Market	2019-2024	2024-2029 (Forecast)
Brazil	+15.6%	+7.6%
India	+11.4%	+9.6%
China	+9.2%	+5.8%
Thailand	+9.0%	+6.0%
US	+8.4%	+2.4%
Australia	+6.6%	+3.7%
Indonesia	+6.0%	+4.4%
Germany	+6.4%	+2.6%
South Korea	+0.3%	-0.2%

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Tailor VMS strategies to market maturity & consumer mindset

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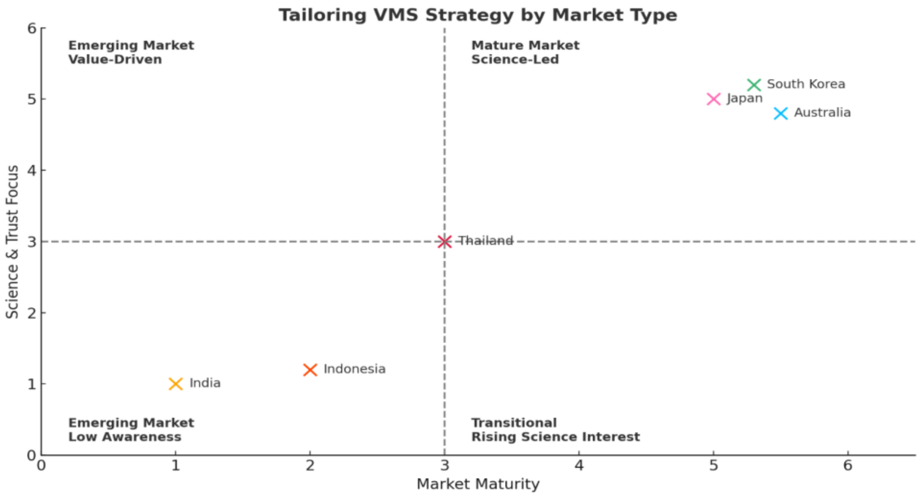
A one-size-fits-all approach won't unlock growth. Brands must localize strategies based on market maturity and mindset. Southeast Asia demands education and access, while mature markets prioritize scientific credibility and lifestyle alignment.

Southeast Asia:

- Focus on awareness-building and benefit-led formats
- Leverage white space in consumer understanding
- Position as affordable, accessible, and relevant
- Use engaging formats (e.g., sachets, gummies) with clear benefit framing

Mature APAC Markets:

- Prioritize layered science and clinically supported claims
- Focus on format innovation (e.g., liposomal, dual-layer, oral sprays)
- Tap into lifestyle-linked health platforms (e.g., Sephora, Olive Young)



South Korea, Japan, Australia (Mature)	India, Indonesia, Thailand (Emerging)
• Highlight data transparency, clinical rigor • Science-first, lifestyle-aligned formats • Innovate for personalization & convenience	• Focus on entry-level education and delivery innovation • Education on why and how supplements help • Emphasize benefit-first positioning

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Preventive health as the primary motivation for VMS: a broader transformation in consumer attitudes, from reactive to proactive healthcare

This shift has accelerated post-COVID-19, with the pandemic reinforcing the importance of immune resilience, everyday wellness, and staying healthy before illness strikes.

Today's consumers increasingly view VMS as part of their daily wellness routine — not just something to take when they're unwell.

Instead of focusing only on deficiencies or treatment, more people are turning to supplements to maintain health, strengthen immunity, and support areas like gut and bone health.

This presents an opportunity for brands to position VMS as proactive, everyday essentials that deliver long-term value and holistic benefits.

Prevention is now the expectation — VMS must evolve to deliver proactive, daily value.

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Source: Mintel

3 consumer-driven priorities guiding wellness innovation in APAC

Thrive for the long run: Longevity and prevention

As prevention becomes the new priority post-pandemic, consumers are shifting away from quick fixes toward solutions that support long-term health. They want to feel good today and stay strong for tomorrow. Wellness innovation is now focusing on two complementary angles of aging:

1. Age better (Prevent & Maintain)
Supporting everyday health and managing age-related concerns:
- Immunity and inflammation modulation
- Bone, joint, and mobility health
- Heart and metabolic health

2. Age slower (Cellular & Emerging Longevity)
Addressing the root causes of aging for longer vitality:
- Cellular wellness and mitochondrial health
- Chronic low-grade inflammation
- Gut health as a foundation for systemic aging

Power up daily: Foundational wellness

Consumers want supplements that deliver quick, tangible results they can feel — especially in energy, digestion, and eye health.
- Energy and stamina
- Digestive efficiency and regularity
- Eye health for screen-fatigued lifestyles

Calm the chaos: Mental and emotional resilience

Stress, poor sleep, and emotional fatigue are rising, but satisfaction with current solutions remains low.
- Mood balance and anxiety support
- Mental focus and calm
- Sleep regulation
- Fatigue and burnout support

Adapt product strategies to evolving health priorities across age and gender in APAC

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Health concerns and supplement needs vary by generation, revealing clear opportunities for age-specific, targeted VMS innovation.

Health priorities and supplement needs by generation in APAC

Generation	Top 5 Concerns	Implication for VMS (based on top health concerns and behavioural insights)
Gen Z (18-30)	1. Energy levels/tiredness 2. Mental & emotional health 3. Vision/eye health 4. Mental performance 5. Gut health	Needs: Mental & emotional support, convenient formats, energy boosters, need for trendy, fast-acting, lifestyle-aligned VMS
Millennials/Gen X (31-60)	1. Energy levels/tiredness 2. Protection against disease later in life 3. Healthy aging/ Longevity 4. Weight 5. Women's/Men's health	Needs: Hormonal balance, energy boost, weight management, longevity-focused, focus on resilience, balance, immunity; multi-functional products in modern formats, emphasise format simplicity and clinical claims
Seniors (60+)	1. Vision/eye health 2. Bones and joints/Mobility 3. Protection against disease later in life 4. Energy levels/tiredness 5. Healthy aging/ Longevity	Needs: Longevity-focused, bone/joint health, energy boost, prioritise ease of use, holistic wellness (physical + cognitive); communicate safety, routine, and comfort

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Source: dsm-firmenich/Ipsos 2025

All respondents 2025 - APAC (excl. Vietnam) = 5250

Redefine VMS claims, from functional to emotional

Consumers are no longer satisfied with basic functional claims; they now seek products that connect with their emotions and lifestyles. This means brands must innovate with storytelling and layered benefits to create deeper resonance and stand out in a crowded market.

- Functional claims like immunity, energy, and digestion are now baseline expectations, requiring brands to differentiate through emotional and lifestyle-driven benefits.
- Emotional claims such as "calm," "glow," and "mental clarity" are rising, resonating with consumers seeking holistic wellness.
- Layered benefits that combine physical and emotional well-being (e.g., stress + sleep, beauty + resilience) are key to standing out.

Gut-brain-skin connection for inner calm + visible vitality

Hy Mpro4 Dual Care Drinking Yogurt for Gut and Skin (South Korea)

Resilience through hormonal balance + beauty

Amorepacific Vital Beautie Woman Balance Inner Glow Supplement (South Korea)

Nighttime regeneration: calm, glow, and stress recovery

Est Liquid Supplement+ (Japan)

Blend science and storytelling for impact

Tailoring claims to generational needs and shifting the focus from "anti-aging" to "living well now" allows brands to align with evolving consumer mindsets. By blending science-backed solutions with emotionally engaging narratives, brands can build trust and relevance across diverse demographics.

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Emotional storytelling enriches functional claims, building deeper consumer trust and engagement.

Generational storytelling is essential:

- **Gen Z:** Focus on digital detox and beauty-first claims.
- **Millennials:** Highlight stress relief and joy.
- **Gen X/Boomers:** Emphasize strength, independence, and longevity.

Longevity claims are shifting from "anti-aging" to "living well now," focusing on vitality, mobility, and mental clarity.

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Connect science to emotion in brand storytelling

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The future of claims is not just what a product does — but how it helps people live, feel, and thrive.

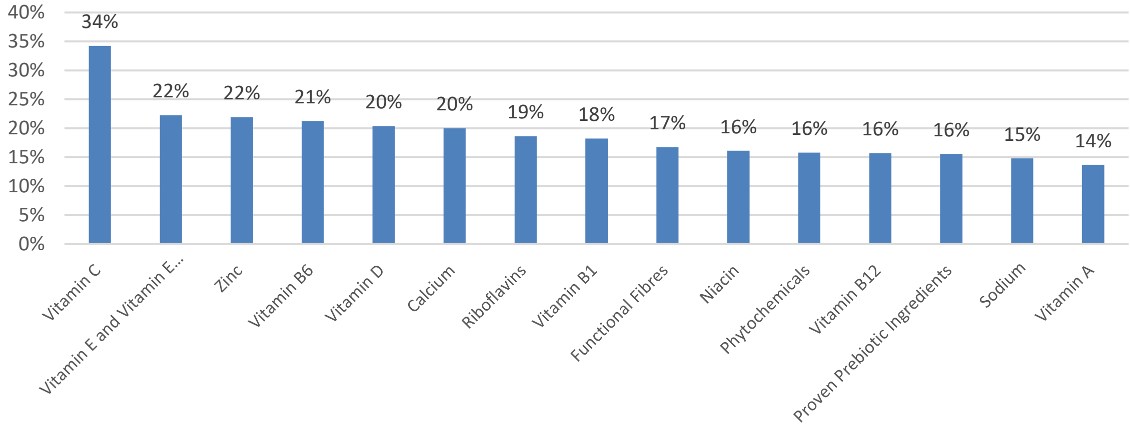
Theme	Key Insight	Strategic Opportunity
1. Functional claims are crowded	Immunity, energy, and beauty remain dominant, but they no longer offer brand distinction	Move beyond generic support with layered or hybrid benefit positioning. Reinforce that core vitamins (e.g. C, D, B-complex) still anchor the VMS category — even as newer launches push emotional or trend-led claims.
2. Emotional & lifestyle claims	Consumers are drawn to how products make them *feel* — calm, clarity, glow, resilience	Shift claims toward emotional outcomes tied to daily routines
3. Longevity = Living well now	From "anti-aging" to active, present-tense vitality — e.g. mental clarity, mobility, recovery	Position longevity as an everyday benefit, not just a future promise
4. Generational storytelling	Health priorities vary: • Gen Z: Focus & digital detox • Millennials: Stress & joy • Gen X/Boomers: Strength & independence	Tailor claims and messaging by life stage to deepen relevance
5. Science + Storytelling	Clinically backed claims build trust — but emotional storytelling drives connection	Blend science-backed solutions with consumer language that links to lifestyle and feelings
6. Trust as a brand differentiator	Trust-building claims (e.g. clinical proof, traceable sourcing, expert endorsement) are becoming emotional drivers, especially in markets like Korea and Thailand.	Reframe safety and transparency as core parts of emotional reassurance. Use certification, science-backed claims, and expert-led storytelling to earn long-term consumer loyalty.

From Familiar to Future-Ready: Ingredient Innovation

While core vitamins like C, D, and B remain essential for consumer trust, the growing interest in emerging ingredients like lutein and ashwagandha highlights a shift toward addressing modern, lifestyle-driven health concerns. This means brands have an opportunity to innovate by layering trusted staples with science-backed, lesser-known actives to meet evolving wellness demands.

- Core vitamins like C, D, and B remain trusted staples, strongly associated with immunity, energy, and beauty.
- Emerging ingredients like lutein (eye health), beta-glucan (immunity), and ashwagandha (stress and sleep) present untapped opportunities for education and innovation.
- Combining familiar ingredients with emerging actives can build consumer trust while addressing modern wellness needs.

APAC: share of VMS product launches, ingredients listed on-pack, June 2020- May 2025



What consumers know: core health associations behind familiar ingredients

Top vitamins remain dominant in APAC because consumers strongly associate them with specific health goals — offering a familiar but powerful base for innovation.

Health Benefit	Top Associated Ingredients (data from Mintel)	Science-led Solution
Beauty (skin, hair)	Vitamin C (44%), Biotin (42%), Vitamin B (31%)	**Vitamin C**: enhanced absorption for skin glow & immunity **Biotin:** for hair, nail support
Cognitive / Mental Health	Vitamin B (42%), Vitamin D (27%), Magnesium (22%)	**Magnesium:** for cognitive health **Pro- and prebiotics:** gut-brain axis support **Vitamin B-complex:** for cognitive stamina
Immunity	Vitamin C (69%), Vitamin D (40%), Zinc (27%)	**Vitamin C**: dual immunity + beauty benefits **Zinc and Vitamin D:** optimal immune health
Sleep	Magnesium (44%), Vitamin B (22%), Vitamin D (21%)	**Magnesium + vitamin B**: stress-sleep balance stack
Physical performance (joints/muscles)	Calcium (72%), Vitamin D (42%), Vitamin C (28%)	**Joint health blends** (e.g. vitamin D + calcium) **BCAA, Creatine Monohydrate, Magnesium glycinate:** for muscle recovery

- Consumers already link familiar ingredients like Vitamin C, B, and D with specific needs — from immunity and energy to sleep and brain health.
- These associations are consistent across health concerns, making **core vitamins a safe yet strategic base** in any VMS formula.
- However, brands must evolve these familiar ingredients through **stacking, delivery, and synergy** to remain competitive.

- Familiar vitamins like C, D, and B continue to lead because consumers trust their link to specific health goals like immunity, energy, and beauty. But trust alone is no longer enough — science-led formats and delivery systems unlock new value from familiar ingredients, while setting the foundation to introduce next-gen combinations.

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Source: Mintel

The ingredients consumers don't know they need (yet)

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- In the evolving wellness space, consumer curiosity is expanding beyond the usual suspects. Yet several science-backed ingredients remain under the radar — representing powerful white space for education, positioning, and innovation.
- While vitamins C, D, and B still dominate supplement labels and top-of-mind awareness, a new wave of ingredients is emerging — not yet widely recognized, but gaining traction for their relevance to today's interconnected health concerns.

Ingredient	Benefit focus based on studies	Rising relevance / Interest
Lutein	Eye health, screen fatigue, cognitive support	Digital wellness, Gen Z/Alpha lifestyle • 30% of Thai Gen Zs already experiencing vision problems linked to excessive screen use.
Beta-glucan	Immunity, cholesterol balance	Natural, science-backed, gut-immune link • 70% of the body's immune cells are located in the gut, making the gut-immune axis a promising area for functional ingredients like beta-glucan
Ashwagandha	Stress, sleep, hormonal balance	Mental resilience, adaptogen trends
Choline	Brain health, pregnancy, liver function	Maternal health, cognitive support, multi-life stage use
Pine bark extract (Pycnogenol)	Circulation, skin aging, inflammation	Emerging in mainstream skincare + wellness
L-Ergothioneine	Oxidative stress, brain aging	Antioxidant amino acid found in mushrooms; dubbed a "longevity vitamin"
PQQ (Pyrroloquinoline Quinone)	Mitochondrial health, energy, cognition	Still niche but emerging in brain and fatigue-related formats
Nicotinamide mononucleotide (NMN)	Longevity, cellular energy	Controversial but fast-rising longevity ingredient in Japan, China, and U.S.
Astaxanthin	Skin, eye, endurance	Potent antioxidant from microalgae; strong fit for beauty-from-within and active aging • 36% of Chinese consumers have heard of and have bought astaxanthin for anti-ageing benefits.

These ingredients sit at the intersection of *resilience, mental wellbeing, and healthy ageing* — areas that are rapidly becoming core wellness goals.

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Source: dsm-firmenich/Ipsos 2025

Move beyond single ingredients to synergistic blends

Consumers are shifting from single-function supplements to multi-functional blends that address interconnected needs like energy + immunity or gut + mood.

As demand for holistic wellness grows, **science-backed combinations** offer white space for brands to move beyond marketing and deliver measureable efficacy.

- 40% of Thai consumers want brands to offer more scientific proof when claiming the benefits of Thai herbs. For beauty supplements, 41% of Thai ingredient-focused consumers say scientific backing is important — and endorsements from health professionals help build trust.

Stack	Consumer Target	Potential Claim
Collagen + Vitamin C + Zinc	Skin & Immunity	“Nourishes from within while supporting your daily immune shield.”
Probiotics + Ashwagandha	Gut + Mood	“Feel balanced inside and out.”
Omega-3 + B-vitamins + Ginseng	Brain + Energy + Vitality	“Sharpen focus, fuel energy naturally.”
Magnesium + L-theanine + Botanicals	Stress + Sleep	“Calms the mind, prepares the body for restful nights.”
Plant-based Omega-3 + B-complex + Magnesium	Mood + Cognition or Heart + Brain	“Supports brain function and mood health” or “Nourish the brain and protect the heart, every day”

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Source: Mintel

The shift from pill to experience for modern consumers

Consumers are moving away from traditional pills and capsules, favoring formats that are enjoyable, portable, and fit seamlessly into their lifestyles. This shift presents an opportunity for brands to innovate with engaging, science-backed formats that enhance both compliance and consumer experience.

- Pill fatigue is driving demand for enjoyable, convenient, and experience-led formats like gummies, powders, and liquid shots.
- In Thailand, traditional formats like capsules and tablets are favoured for their functionality. While , jellies and gummies offer a pleasurable experience, making them an attractive option for younger audiences.
- Emerging delivery systems like oral sprays, layered gummies, and microbiome-targeted formats are reshaping the VMS landscape.
- 45% of Korean consumers aged 35-44 find gummy formats enjoyable, and 43% prefer jelly types, though both are considered hard to access.

Format Status	Examples	Consumer Signal / Implication
Dominant	Pills, capsules, tablets	Trusted and traditional, but often seen as generic and less engaging
Rising	Gummies, powders, sachets, oral strips, drinks	Fun, flavorful, and lifestyle-integrated. Appeals to Gen Z and busy adults
Future-ready	Liposomal, dual-layer, dissolvables, microbead capsules	Science-forward formats with added value (e.g. bioavailability, personalization)

Source: Mintel

PRODUCT EXAMPLE

Emerging delivery formats: making science-backed solutions more accessible and enjoyable

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Oral “melts” strips

[Wellbeing Nutrition Melts](#) are strip supplements that dissolve rapidly upon contact with saliva for better absorption while its active ingredients are directly released into the bloodstream for instant action. Ideal for kids or elderly consumers with difficulty swallowing pills. (India, Europe, US).

Layered gummies

[UPSA x Nourished 7 in 1 Beauty Gummies](#). Based on patented technology, the tender gummies combine seven layers rich in active ingredients such as Coenzyme Q10, resveratrol, zinc and vitamins. Targets both beauty and immunity in one delivery. (France).

Candy capsule

[Boncha Bio Candyceuticals](#) are candy-textured capsules with active ingredient fillings. [The technology](#) allows for the inclusion of both water-soluble and fat-soluble elements as well as liquid and powder forms in a single formula. Positioned for users seeking indulgent yet effective vitamin formats. (China).

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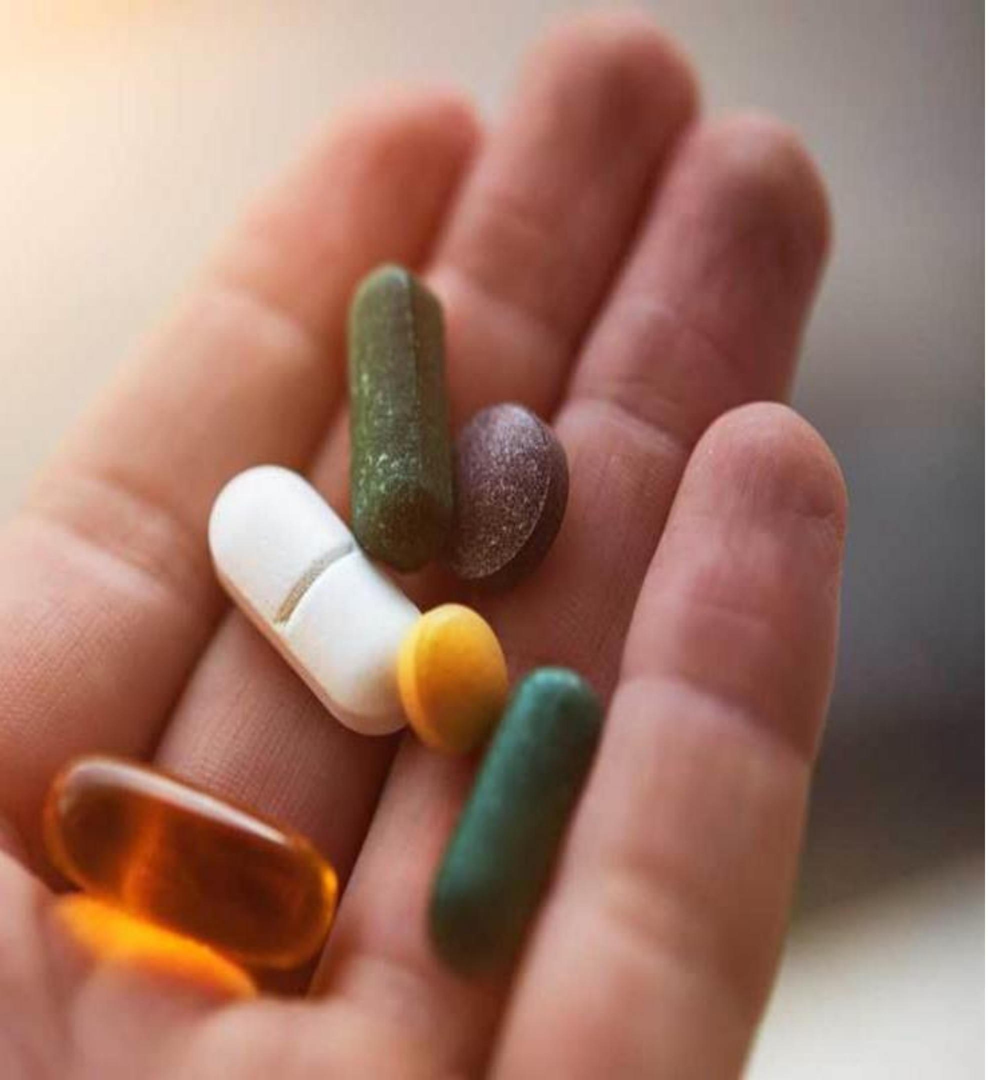
Explore delivery systems that can enhance efficacy and experience

Technology / System	Function	Benefits
Liposomal delivery	Enhanced absorption and bioavailability	Supports efficient nutrient uptake, may allow for lower dosages with higher efficacy.
Targeted coating systems (e.g. enteric, delayed-release)	Site-specific or timed release	Protects sensitive actives from stomach acid; useful for probiotics, minerals, botanicals.
Micro-encapsulation	Stabilizes and isolates sensitive ingredients	Improves shelf life and taste; can help mask off-notes (e.g. B vitamins, botanicals).
Dual-layer or Multi-phase formats	Layered nutrient release over time	Delivers sequential support for multi-need functions like stress + energy or sleep + recovery.
Taste-masking innovations	Improves palatability of bitter ingredients	Enhances compliance for nutrients with poor taste profiles (e.g. magnesium, adaptogens).

Delivery technologies are evolving to support both **efficacy** and **experience**. Whether improving taste, absorption, or timing, these systems help brands meet rising expectations for performance and ease of use.

What’s Next: Strategic Innovation & Recommendations

Expert POVs and Strategic Opportunities



What we've learned

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- Consumer priorities in APAC are evolving from general wellness to targeted health outcomes, especially mental wellness and healthy aging.
- Functional needs differ by age — mobility and immunity in older adults vs. energy and focus in younger users.
- Supplement engagement is still underdeveloped in Gen Z and Millennials, signaling whitespace.
- Claims and ingredients must align with age-specific motivations: e.g. gut health → cognition (younger), inflammation → mobility (older).
- Delivery formats play a key role in compliance and perception of efficacy, especially for non-pill formats (gummies, sachets, melts) among younger and convenience-focused users.

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Strategic lens: where to focus next in the VMS journey

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Across APAC, consumer expectations in the supplement space are evolving — moving beyond generic multivitamins to more **targeted, benefit-driven**, and **science-supported** solutions. From format innovation to deeper personalization and emotional claims, brands now need to show how they're addressing **real-life health goals** across different market maturities. The future of VMS innovation in APAC lies in smart combinations, credible formats, and resonant positioning — not just adding more ingredients, but creating solutions that are understood, valued, and easy to stick to.

The VMS category is undergoing a structural shift:

Foundational claims	Functional + emotionally resonant claims
Generic supplements	Health benefit stacks & synergistic blends
Static formats (pills & capsules)	Experiential + science-led formats

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Deliver efficacy through streamlined formulas

As consumers become more science-savvy, skepticism rises—especially toward crowded, overengineered formulas. Simplicity and transparency win trust. Consumers are increasingly wary of complex formulas that cram in too many ingredients without synergy or explanation. This has been heightened by high-profile incidents—such as the Kobayashi recall in Japan and Blackmores' class action lawsuit in Australia—which have further amplified concerns over transparency, safety, and scientific credibility.

Winning formulation strategies

- Use clinically validated dosages
- Prioritize purposeful ingredient pairing
- Communicate science clearly and credibly
- Embrace advanced yet accessible formats (e.g., liposomal, encapsulated delivery)

25%

- of Indian VMS users value brands that share details about clinical trials

51%

- of Thai consumers prefer supplements backed by clinical evidence

64%

- of Thai consumers are skeptical of "fast-acting" claims without scientific proof

Source: Mintel

Generational insights unlock targeted VMS innovation

Each generation approaches health and VMS use through a different lens — from short-term performance in younger groups to holistic, proactive wellness in seniors. These generational nuances provide white space to tailor products by need, format, and messaging style.

1 Younger consumers (Gen Z and Millennials)

- Their VMS use is often occasional and linked to **specific lifestyle needs** such as boosting energy, managing stress, or supporting eye and skin health.
- They are more motivated by immediate benefits like **confidence, self-image, and an active lifestyle**, rather than long-term health.

- They respond well to formats that are fun, convenient, and can be integrated into daily routines. Frames VMS as part of a modern, self-care lifestyle.

2 Middle-aged consumers (Older Millennials and Gen X)

- They are more engaged with VMS as they begin to experience the first signs of ageing and want to maintain their quality of life.
- This group is interested in VMS that helps them manage mid-life transitions, such as menopause or increased work and family stress.

- They value products that offer resilience and vitality, and are open to formats that fit their busy routines.

3 Senior Consumers (Baby Boomers and Older)

- Seniors are the most regular VMS users, driven by the desire to manage age-related health concerns, chronic conditions, and overall wellbeing.
- They seek personalised VMS solutions that address specific needs (bone, immunity) and easier-to-consume formats (e.g., smaller tablets, easy-open packaging)

- Focus on holistic wellbeing—physical, mental, and emotional—has strong appeal for this group

Age-driven needs call for age-driven solutions — format, function, and emotional resonance must align with generational health mindsets.

Deliver contextual, habit-forming solutions for every lifestyle

Lifestyle needs are now core to how consumers shop for VMS. Today's shoppers want stacked solutions built around *real life* — whether it's work stress, recovery after a workout, or restful sleep. The true opportunity lies in creating **contextual, habit-forming formats** that deliver both relevance and results.

Segment	Emerging consumer priority/Behaviour	Relevant ingredient opportunity
Digital burnout relief	Seeking eye health, stress relief, and mental clarity due to screen fatigue	Lutein, Pro-/prebiotics, DHA
Holistic beauty routines	Looking for beauty-from-within rituals tied to sleep and stress	Collagen, Magnesium, Pro-/prebiotics
Everyday immune readiness	Expecting fast-acting, trusted formats during seasonal changes	Liposomal Vitamin C, Zinc, Elderberry
Women's evolving needs	Demanding solutions for hormonal balance, skin, and emotional health across life stages	Omega-3, Magnesium, Pro-/prebiotics, Iron
Men's evolving needs	Growing interest in vitality, cognitive sharpness, and active aging	Omega-3, B-vitamins (when supported), Zinc, Ashwaghandha
Gut + mood axis	Turning to microbiome-supporting ingredients for emotional regulation	Pro-/prebiotics, Postbiotics

Match the right format with the right function

Consumers now expect **more than convenience** — they want formats that deliver on both **lifestyle fit and proven benefits.**

Formats are becoming signals of function, especially in categories like **beauty, sleep, and immunity.**

Opportunity:

✅ Prioritize formats that drive **compliance** through taste, portability, and dosage clarity.
✅ **Bridge preference with performance** — pair loved formats (e.g. gummies) with proven science.
✅ Innovate with format technologies (e.g. liposomal, dual-layer) to **unlock efficacy and appeal.**

Format	Primary function	Consumer appeal
Gummies	Beauty, Sleep	Fun, flavorful, familiar
Powders/Sachets	Gut Health, Immunity	Customizable, blends easily in routines
Oral Sprays	Fast delivery (Energy, B12, Sleep)	Quick-hit, on-the-go
Softgels	Heart Health, Cognition	Perceived as serious / premium feel
Melts / Strips	Stress, Sleep	Kid- and elder-friendly, easy compliance
Candy Formats	Collagen, Probiotics	Treat-like with added health value

Source: Mintel

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Lead the next-gen VMS with science, trust, and daily relevance

Consumers are demanding more from supplements: **proof, purpose, and personalization.** The path forward must balance **science-backed innovation** with **trust-building execution.**

The next-gen VMS isn't about adding more—it's about **adding what matters:**

Lead with layered science:

Ground every claim in layered science, from clinical validation to delivery efficacy.

Balance versatility with validation:

Multi-ingredient stacks are rising, but synergy must be **proven, not presumed.** Stacked solutions must be more than trendy — they must prove synergistic impact.

Make transparency a differentiator:

Communicate **sourcing, testing, and formulation standards** clearly and visually. Certifications and clean sourcing build trust in noisy markets.

Design for daily relevance:

Focus on formats and blends that naturally **embed solutions into routines,** not one-off fixes.

Future-proof through resilience & prevention:

Shift narratives from reactive health to **long-term well-being and self-care rituals.**

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