INDUSTRY
Bringing the UC-II® brand to the masses

TRENDS
A colorful approach to clean-label

INGREDIENTS
The future of sports nutrition

TURN DESIGN ON ITS HEAD
How consumer driven insights are shaking up the product design process and creating opportunities to connect with the values-driven consumer.
DELIVERY
About to hit the road with your next probiotics product? The right choice of delivery system will keep sales on track.

INDUSTRY
Discover how Lonza’s consumer education campaign is shining new light on the joint health category.

INGREDIENTS
The active lifestyle scene is booming. Have you found your perfect training partner yet?

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As we approach the start of a new decade, the world around us is constantly changing. For Lonza – a global company, the consumer is our compass for navigating the evolving health and nutrition marketplace. Values-centric, shoppers in the grocery aisle are looking for engaging ways to live healthily alongside taking responsible decisions for the next generation.

Welcome to The Supplement. Focusing on the big picture topics in the industry, the publication is part of our commitment to supporting supplement brands and manufacturers in adapting to an uncertain future. In the first issue, we’ll be covering the new age of product design – inspired by the consumer – alongside the latest innovations in scientifically-backed ingredients and delivery systems.

We hope you enjoy it!

Aparna Parikh,
Head of Global Marketing Communications,
Lonza Consumer Health & Nutrition
CONSUMER FIRST DESIGN

We all know the feeling. The links between nutrition and healthy aging are clear — at the end of a long day though, convenience or indulgence can take priority over self-care. Choosing ‘better’ shouldn’t be hard — it’s time for the supplement industry to rethink its design imperatives.

Today’s values-driven consumers expect more from the brands and products they use. As well as seeking products that help them live longer, healthier lives, they’re also attracted to brands committed to making a positive impact,” says June Lin, Head of Global Marketing, Lonza Consumer Health & Nutrition. “Manufacturers need a strategy to move from ‘now’ to ‘next’, where the goal is carefully designed, relevant products that delight consumers and respect the planet.”

A distinct consumer segment has been born. “There is a rising cohort of consumers that can be termed ‘Aspirationals’ – defined by their love of shopping and desire for responsible consumption,” continues Lin.

Collectively, these changing behaviors are shaping the future of the consumer health and nutrition market. The pressure is on, for challenger and established brands alike. But the potential for lucrative success is significant, with health-focused consumers often highly influential.
Lin adds: “Aspirationals are set apart by their high levels of brand engagement. In fact, 87% of those that we spoke to actively promote the purchase they make to their social networks.”

Last year, Lonza surveyed 1,000 Aspirationals from across the US to get under the skin of their interconnected priorities when pursuing a healthy lifestyle. The results show that Aspirationals are motivated by a combination of long-term goals like wanting to live longer, as well as more immediate needs such as looking better and having more energy. Plus, 81% of those surveyed would be willing to pay a premium for a more sustainable positioning.

However, in an era of information and decision overload, are consumers not feeling overwhelmed? “We also identified the tensions faced by Aspirationals when shopping for ‘healthier’ products — and the opportunities each present for innovation in product design,” continues Lin. “For example, we tend to recognize that it’s a case of ‘good in, good out’ for our bodies — but sometimes it’s hard not to feel like health is a chore. If we want consumers to routinely take the better-for-you option, then it needs to entice all the senses.”

There’s no denying it — in a global health food industry valued at $747 billion, the stakes are huge. But the rewards for solving these pain points with thoughtful product innovation are equally exciting.

65% of consumers globally want to support companies with a stronger purpose

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1. BBMG + GlobeScan, Brand Purpose in Divided Times, 2017
2. Statista
In the performance nutrition industry, talk often centers around the rise of the ‘weekend warrior’. For many fitness enthusiasts though, sport is much more than a pastime – it’s a way of life. Active living is now a day-to-day regimen for millions of consumers worldwide. As the use of digital and wearable technologies takes hold, the ability to track our own health status is (almost) in the palm of our hand. Heightened interest in nutrition follows naturally.

Niche hyper-segments are also emerging to drive further category innovation. “The rise of gaming, or ‘esports’, where players need sustained energy levels and mental clarity to allow them to stay focused for several hours of continuous play at a time, places huge demands on the body,” says Juliana Erickson, Senior Marketing

The sports nutrition category continues to go from strength to strength. But which ingredient innovations are the star players this season?
This raises a challenge for manufacturers to create nutritional solutions that support energy and concentration – alongside protecting the eyes. 

Manager, Lonza Consumer Health & Nutrition.  

“While it may not be a typical ‘sport’, this raises a challenge for manufacturers to create nutritional solutions that support energy and concentration – alongside protecting the eyes from prolonged exposure to screens.”

Up Your Game  
From Acrobatics to Zumba, there is no one-size-fits-all when it comes to fitness. The same applies to the wide variety of sports nutrition products on the market, all aimed at helping consumers.

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In today’s active consumer knows about the benefits of nutrition and, increasingly, looks to sports nutrition supplements to provide targeted support to help them meet their goals – whether that be achieving peak performance, reducing the time taken to recover from exercise or addressing specific concerns, such as joint comfort and mobility,” comments Shane Durkee, Vice President, Platform Innovation, R&D, Lonza Consumer Health.

In a category well-known for record-beating innovation, the onus is on ingredient suppliers to support customers in staying ahead of the competition. SupplySide West 2019, for example, saw the launch of the latest addition to Lonza’s sports nutrition portfolio: its new MuscleGuard™ ingredient formulation. “The MuscleGuard™ brand showcases our science-led approach to ingredient innovation – bringing clinical evidence together with key consumer trends and preferences. Outside of sports nutrition, for example, the MuscleGuard™ formulation also has applications in supporting muscle strength and muscle mass in elderly adults,” explains Durkee.

Clean Performance

As fitness becomes an integral part of an overall active lifestyle, how are wider consumer health and nutrition trends impacting on sports nutrition supplements? Clean-label, for one, remains highly relevant to wellness-conscious consumers and especially those engaged in active nutrition. In fact, 85% of US sports nutrition product users questioned by the Natural Marketing Institute (NMI) on behalf of Lonza want to know the source of the ingredients in the products they are consuming.

“Sports nutrition consumers look for effective nutrition to support performance and recovery that’s also clean-label, non-GMO, high-quality and clinically studied,” says Shane Durkee, Vice President, Platform Innovation, R&D, Lonza Consumer Health. “Launched earlier this year, our Oceanix™ brand is a unique, sustainably sourced phytoplankton ingredient.
TWO-THIRDS (67%) OF US CONSUMERS WHO ARE LIKELY TO BUY SUPPLEMENTS SAY THEY ARE ALSO LIKELY TO PURCHASE SPORTS NUTRITION SUPPLEMENTS, UP FROM 45% IN 2015.3

And the final piece in the puzzle? “Convenience is key in this category,” says Erickson. “Active consumers are often fitting sports nutrition supplements into already busy lifestyles. The choice of delivery format is crucial in helping to achieve optimal user experience and efficacy.”

As new sports trends, such as high intensity interval training (HIIT), gather pace, demand for on-the-go nutritional products will only increase. New technologies such as liquid-filled capsules, beadlets-in-capsules and lipid multiparticulates (LMPs) continue to push the boundaries of innovation in the field. Can you keep up?

Take joint health. "Joint health is already one of the top five health concerns for US adults, but there remain huge untapped opportunities for innovation within the category," explains Erasmo Schutzer, President, Lonza Consumer Health & Nutrition. "As an industry leader, we felt we had a responsibility to find creative ways to push the topic up the agenda."

Join the Movement

Last month, Lonza did just that with the US launch of a high-impact consumer education program aimed at driving joint health awareness among young, active individuals. "The Lifestyle in Motion™ campaign kicked off with a New York exhibit by acclaimed Brazilian artist Bob Wolfenson," explains Rafael Costa-Gargaglione, Head of North America, Lonza Consumer Health & Nutrition. Titled Move to the Extra[Ordinary]™, the series of photographic essays asked the audience to look again at ordinary movement – from the small, daily movement we take for granted, to the act of pushing our bodies to their physical limit.

So what else is in the works for the Lifestyle in Motion™ campaign? It’s hush-hush for now, but there’s a packed calendar of activity to alter common perceptions of joint health and motivate people to reflect on their own habits. "Consumer education is central to our strategy, as we look to build the UC-II® brand and help our customers to grow their joint health business," adds Schutzer.

“When we look at movement through a lens, it is redefined, and what we thought was ordinary becomes Extra [Ordinary]. Our bodies are made for movement – the flex of a muscle, the bend in a joint..., every element works together without us thinking, yet it is Extra[Ordinary].”

Bob Wolfenson, Photographer and Artist
The wealth of information at our fingertips today is truly staggering. Every second, our brains are bombarded with constant reminders of the importance of looking after our health and our planet. When faced with a plethora of choice, how can supplement brands help consumers make sense of the chaos?

Such is the backdrop for rising demand for cleaner and clearer labels. “Shoppers are increasingly interested in the stories behind products because, as their aspirations evolve, they are becoming attuned to their impact on the wider world,” explains Barri Sigverthor, Global Innovation Marketing, Lonza Consumer Health & Nutrition.

With “Conscious Consumer” identified as one of Euromonitor International’s Top 10 Global Consumer Trends for 2019, the trend isn’t slowing down anytime soon. But local insights are essential to avoid consumer preferences getting lost in translation.

“Consumers are ultimately driven by a desire to be a better, healthier version of themselves. The conversation has shifted from product labels to become a much bigger dialogue, one that encompasses everything from transparency and ingredient sourcing to manufacturing processes and responsible company operations,” says Beth Tormey, Senior Vice President, Lonza Consumer Health & Nutrition.

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LABEL LOVIN’

TODAY’S CONSCIOUS CONSUMERS WANT TO LIVE LIFE TO THE MAX.
“To us, ‘clean-label’ is not only a goal. It’s also a value that drives and feeds our culture of continuous improvement. There’s no finish line, no end point: the consumer is at the core of our business, so the standards we set ourselves grow and evolve as their aspirations shift.”

Clean Up Culture

In a world of uncertainty, consumers crave confidence in the products they’re purchasing. Safety and quality remain top priorities, making quality an attribute that needs to be designed into all stages of product development.

To gain trust, supplement manufacturers must commit to making transparency a priority across their operations and invest in building knowledge, expertise and resources. The ingredient and delivery system need to work in synergy to create a total solution – this includes checking that all raw material sources, vendors and practices support cleaner and clearer labels.

“We continue to work closely with our customers and suppliers to discover new raw material sources,” adds Tormey. “Made from tapioca fermented into pullulan, our Plantcaps® capsules are a great example of a more natural alternative and offer a market-leading plant-based oxygen barrier to protect sensitive ingredients.”

Get That Gram

For the Instagram generation, image is everything. Here, the latest advances in capsule technologies are also opening opportunities for new product innovation in line with consumer expectations.

“Offering a variety of consumer-valued certifications supporting cleaner labels,” says Sigvertsen. “Color offers an opportunity for brand owners to further differentiate. In the past, manufacturers relied on artificial colorants to achieve a stable, long-lasting look. Now, we have developed new solutions and expanded the possibilities of color use with our Vcaps® Plus clean-label colored capsules.”

CAN COLOR HELP
YOUR BRAND
STAND OUT IN A
CROWDED MARKET?
DELIVERY

PROBIOTIC SUPPLEMENTS ARE FORECAST TO SHOW A 6.9% CAGR FROM 2017 TO 2023

Ready to hit the road with your next probiotic product? The journey to the intestines is full of hazards – from strain survival to shelf life limitations, the right choice of delivery system will safeguard good bacteria and keep sales on track.

“Consumers are taking active steps to manage health and focus on prevention. Increased clinical substantiation in digestive health, immunity and beyond has enhanced credibility and has driven probiotics into high popularity. Data from Euromonitor indicates that probiotic supplements will show a 6.9% CAGR from 2017 to 2023,” says Dominik Mattern, Associate Director, Global Innovation Marketing, Lonza Consumer Health & Nutrition.

But which vehicle’s best? When compared to functional foods and beverages, capsules offer multiple benefits including taste- and odor-masking. “The latest capsule technologies allow probiotics to successfully pass through the low pH environment of the stomach before reaching the intestines, as well as providing protection from early activation that may be triggered as a result of exposure to environmental humidity,” explains Mattern.

“To support manufacturers in overcoming these challenges, Lonza has developed its award-winning DRcaps® capsules to protect acid-sensitive ingredients, like probiotics, and provide a modified release to allow for complete dissolution in the intestines. Made from HPMC, these vegan and vegetarian, non-GMO approved capsules also have a low moisture content. Moisture is the biggest enemy of probiotics.”

For supplement brands looking for line extensions, capsules also offer flexibility of formulation. Lonza’s DUOCAP® patented capsule-in-capsule technology is ideally suited for combination or dual release products. Mattern adds: “Pre- and probiotics play complementary roles in digestive wellness. The DUOCAP® delivery form offers a unique combined release for innovative pre- and probiotics digestive health formulations.”

1 Natural Marketing Institute. 2018 Lonza EMMO report. (unpublished)
“Supplement manufacturers need product strategies and innovative formulations and technologies that are relevant, delight consumers, and respect the planet.”

Beth Tormey, Senior Vice President, Lonza Consumer Health & Nutrition.