

# Personalisation, the next big opportunity in nutrition

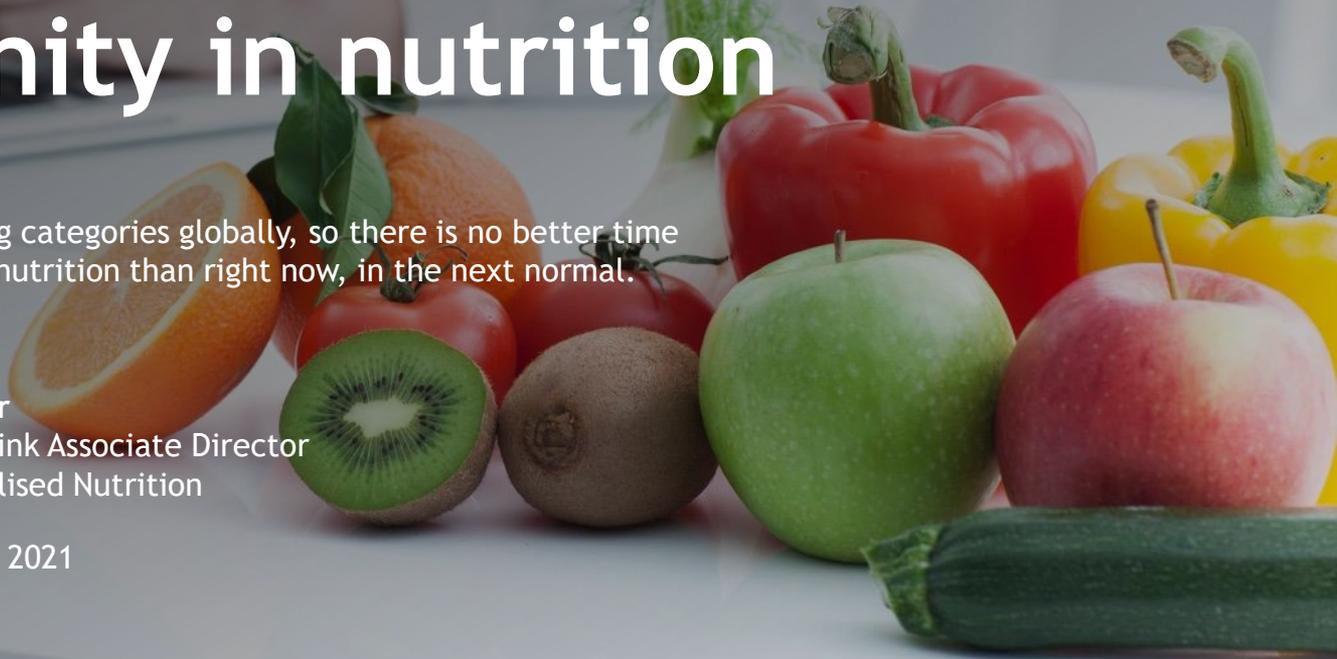
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It's one of the fastest-growing categories globally, so there is no better time to engage with personalised nutrition than right now, in the next normal.

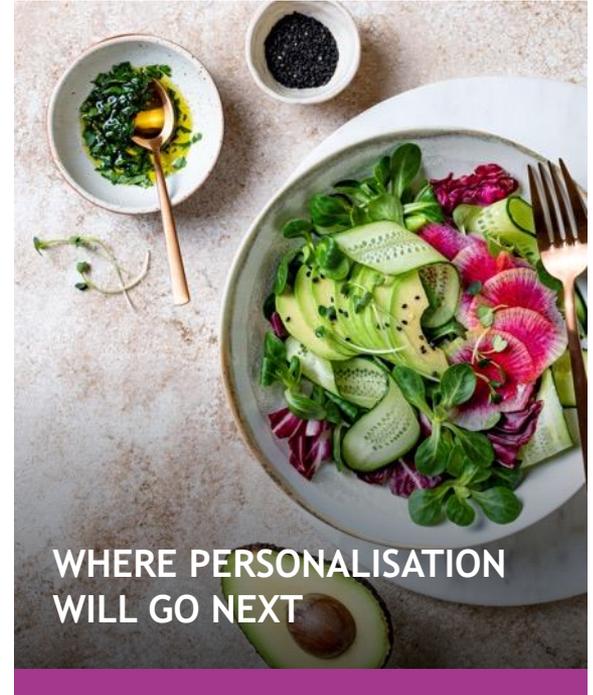
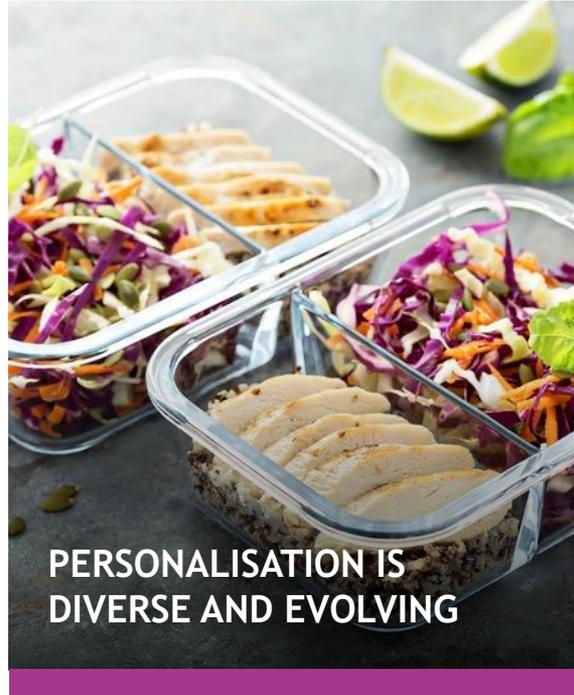
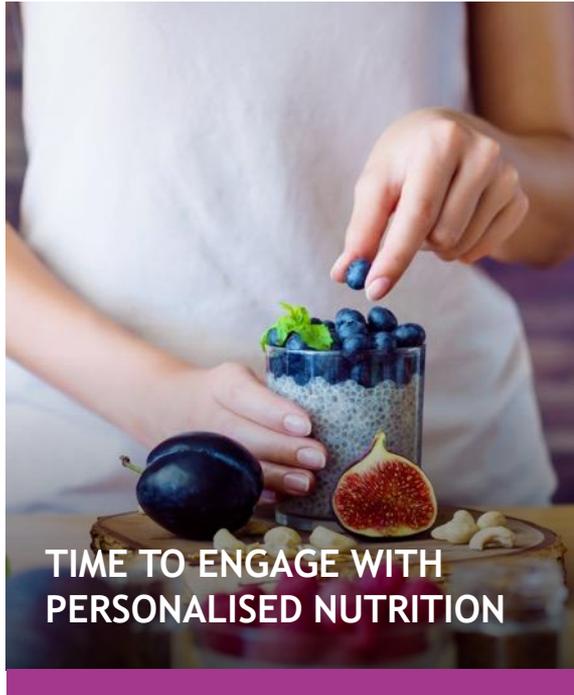


**Rick Miller**  
Food & Drink Associate Director  
for Specialised Nutrition

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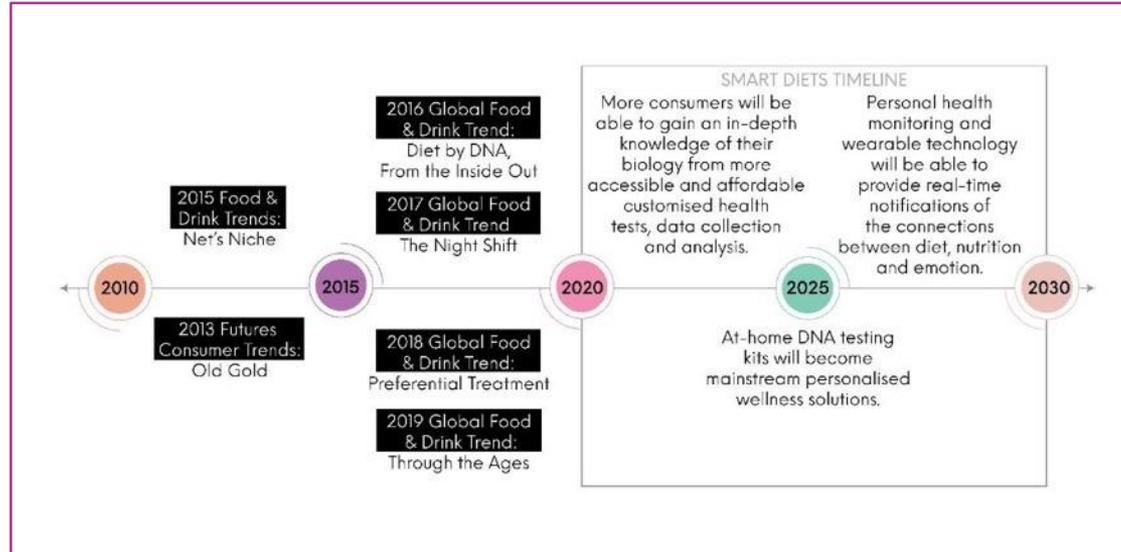
# Coming up





**TIME TO ENGAGE WITH  
PERSONALISED NUTRITION**

# Mintel's 2030 Trend Smart Diets gives a predicted timeline for innovation in personalised nutrition



Trend timeline: the path that leads to *Smart Diets* by 2030

Mintel's 2030 Food & Drink Trend *Smart Diets* outlines the growth of personalised solutions over the next 10 years and connects with the consumer behaviour drivers of *Wellbeing, Technology, Identity* and *Rights*.

COVID-19 has only given *Smart Diets* new urgency and accelerated the need for personalised nutrition and healthcare solutions by making health a greater priority and consumers more comfortable with technology.

# Despite data protection concerns, consumers are ready for personalised nutrition

IN THE US

**73%**

of nutritional drink consumers agree they'd like more products personalised to their needs, and 81% for their children's needs

IN THE UK

**70%**

of VMS users show interest in a VMS plan tailored to individual needs, and 68% in in-home testing kits to identify deficiencies

IN CHINA

**84%**

of dieters are interested in a bespoke menu by a nutritionist, and 83% in prepared meals that meet their health needs

*Base: US: 871 internet users aged 18+ who personally consumed any nutrition drink since the start of 2020; UK: 1,224 internet users aged 16+ who took VMS in the 12 months to June 2019; China: 2,067 internet users aged 18-49 who have weight management goals in the next 12 months*

*Source: Kantar Profiles/Mintel; KuRunData/Mintel*



# Consumers are willing to share their data if a more personalised product is the outcome

Brands that are looking to enter the personalised nutrition space could be concerned about the management of data and whether consumers will engage with products that require sharing sensitive personal information such as medical conditions, blood test results and more.

However, if brands can meet consumer expectations surrounding data security, this appears to outweigh their concerns about sharing. For instance, in China, 72% of adults believe that sharing personal information and health data enables health tech products to provide more personalised services. Similarly, in the UK, 15% of those over the age of 55 have used a smartwatch or another device to track their diet.



# 40%

of German adults would be interested in vitamins, minerals or dietary supplements personalised specifically for their needs

*Base: Germany: 1,192 internet users aged 16+ who have taken vitamins, minerals or dietary supplements in the last 12 months*

*Source: Kantar Profiles/Mintel*



MINTEL

The image shows two clear plastic meal prep containers on a grey surface. The foreground container is filled with a dark quinoa base, topped with sliced grilled chicken, and a side of salad containing purple cabbage, shredded carrots, and green basil leaves. The background container is similar but lacks the quinoa base. In the top right, there are lime wedges and more basil. In the bottom left, several green pumpkin seeds are scattered on the surface.

**PERSONALISED NUTRITION  
IS DIVERSE AND EVOLVING**

# Personalised nutrition currently falls into one of four approaches

## Assessment-based

The broadest of all, consumers provide varying levels of personal information from basic (eg, height, weight, gender) to more complex, such as medical history. Offerings vary from customised VMS (eg Piquet) to protein powders (eg Gainful).

## Genetics-based

Consumers provide a saliva swab to assess genes that have been linked to health or fitness. Services vary from complete nutrition programs based around DNA (eg DNA Fit) to those that provide a health report and supplements based on DNA, such as NGX.

## Biomarker-based

More familiar to consumers given the crossover with medical investigations, biomarker-based services utilise blood tests to offer a more real-time assessment of nutrient needs. Brands such as [Vitol](#) and [Baze](#) use this approach for their VMS packs.

## Microbiome-based

Targeting a more gut-health-focused consumer, brands use a stool sample that assesses the distribution of gut microorganism species. Personalised supplements can then be recommended. Brands such as [Viome](#) and [Biohm](#) lead in this category.

# Personalised protein powders remain a niche category, whilst VMS dominates

Personalised protein powders were first on Mintel's target in our *Future of Specialised Nutrition: 2020* report. However, now, a year later, there are few additional market examples.

In contrast, personalised VMS have witnessed strong growth even during the COVID-19 outbreak. Brands looking to enter the personalised nutrition market may see VMS as the mature category, whilst protein powders as one with room to grow.



Personalised protein powder from Gainful (US)



Personalised Protein Co. opened the personalised protein category (UK)

# In Asia-Pacific, botanical ingredients continue to grow within the category



## Personalised Ayurvedic VMS

1Balance personalised Ayurvedic health supplements target Indian consumers via an interactive health quiz that assesses diet, lifestyle and health, and issues such as sleep, stress, immunity and digestion (India).



## Personalised menstrual health

Malaysian personalised VMS brand [Vitamine](#) offers 30-day sachets of either premade or fully personalised supplement packs (Malaysia).



## Paquet keeps the doc away

[Paquet](#) offers personalised VMS packs via an online questionnaire. The detailed health report leads to a 30-day supply of personalised micronutrients (Singapore).

# Nourished Malaysia want to be the ‘candy counter’ for personalised beverages

Nourished Asia typically sells functional ingredients as an ‘al-la carte’ model but have recently started to offer a subscription based functional beverage service called Nourished Personal. According to Beverage Daily the majority of the ingredients in the service are US and EU origin.

Consumers choose a ‘base’ product (eg. milk, coffee, tea, fruit juice or yogurt), after this they can add functional ingredients (eg. collagen, DHA, vitamins, minerals, pro and prebiotics) in conjunction with a professional consultation. Nourished advise on their website it takes 14 days to confirm the formula via in-house professionals. Consumers then pay a monthly fee (approx \$55) for unlimited ingredients focusing on 1-2 ‘functional areas’ (eg. skin health)



Nourished Personal - Malaysia's first personalised functional beverage

# In Europe, personalised VMS brands focus on traditional micronutrient formulas



## Vitamin Manager

Vitamin Manager were founded by Ironman athlete Jojje Borssén and allow consumers to customise vitamin packs which include some herbs such as turmeric according to a detailed questionnaire. Consumers can purchase once or subscribe (Sweden)



## LOEWI

LOEWI produces personalised vitamins and minerals based on blood tests, a lifestyle questionnaire and consultant examination. The emphasis of LOEWI is on changing micronutrient subscriptions with repeat blood tests (Switzerland).



## Cuure

Cuure produces personalised micronutrients using a lifestyle questionnaire as well as premade formulations. It emphasises the locality of its production in France and low-cost shipping (France).

# 3D printing takes personalised gummy VMS in a new direction

UK VMS brand Nourished offers home-delivered, personalised gummy VMS 'stacks'. Consumers can pick from an array of different micronutrients and herbal extracts, or pick from a selection of premade stacks (eg prenatal, energy, sleep and relaxation).

Nourished claims to have developed the world's first truly tailor-made nutrition product using innovative 3D printing technology and a unique vegan encapsulation formula. According to a recent press release, Nourished also has plans to expand into personalised kids' gummy VMS by the close of 2021.



Nourished 7-ingredient VMS 'stack' (UK)

# myAir nutrition bars take a bold step into the personalised mental health space

myAir takes a unique nutritional approach to tackle the huge health concern of stress. Using a combination of an algorithm based on physiological (such as heart rate tracked via a smart watch) and psychological data, this profiles the consumer's cognitive response to stress.

myAir then customises a combination of myAir bars, which are infused with botanical blends including sage, hops, oats, valerian, rosemary and others to the customer's specific needs from a wide range of formulas. The bars are available through a subscription service and delivered monthly.

The company says that these ingredients work synergistically to promote a specific stress-counteracting effect, whether to sharpen focus, revive energy, reduce anxiety, support relaxation or promote quality sleep.



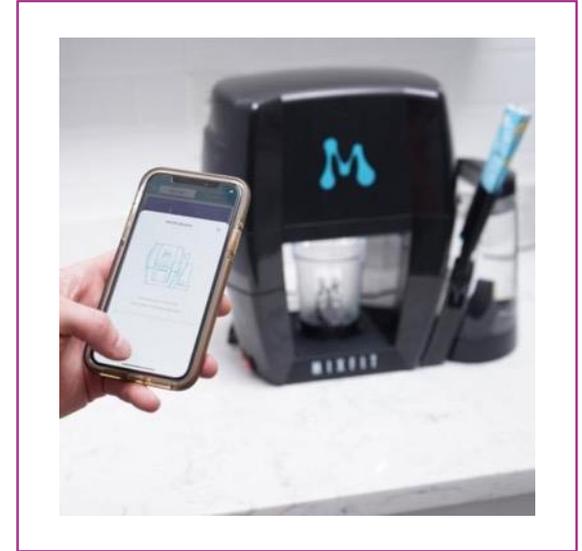
myAir offer personalised nutrition bars to combat stress (US)

# MixFit establishes the beginning of an ‘ecosystem’ of continuous and predictive solutions

DSM recently acquired a 50% stake in MixFit which uses a proprietary health data collection app called MINA to bring health wearables, nutrition and environmental data together to create custom drinks (24 nutrients) that fill nutrient gaps.

In an interview with [Nutraingredients](#), Kimberly Smith VP of personalised nutrition at DSM stated that MixFit is ‘one of a number of companies’ that DSM is acquiring to **create an ecosystem of personalised nutrition solutions** for consumers, integrating diagnostics, health advice and personalised solutions.

29% of US consumers said they would be interested in a personalised drinks system (eg Mixfit) and hence this approach may well be a leading platform for personalised nutrition in the mass market.



MixFit claims to fill nutritional gaps for less than 1\$ a day

# Consumers consider wearables as useful technology for various health goals

IN THE US

62%

of consumers who own a smartwatch use it to monitor their health, as opposed to 25% who feel it is a fashion statement

IN CHINA

86%

of consumers with weight management goals in the next 12 months are interested in wearables (eg smart watch) to track health status

IN THE US

58%

of Black consumers feel that COVID-19 has increased their interest in wearable technology that can detect potential health issues

Base: US: 418 internet users aged 18+ who own a smartwatch; China: 3,000 internet users aged 18-49; US: 1,000 Black internet users aged 18+

Source: Kantar Profiles/Mintel; KuRunData/Mintel



# Watch smart devices that enrich and augment the personalisation journey

All four potential routes of personalised nutrition are enriched by smart devices that track, interpret and advise consumers what their body is telling them.



## Hack your metabolism

Lumen takes complex indirect calorimetry and turns it into a simple handheld device to track fat and carbohydrate metabolism during the day. Consumers breathe into the device and see what 'fuels are burning' to optimise metabolism (US).



## Listen to heartbeat for better sleep

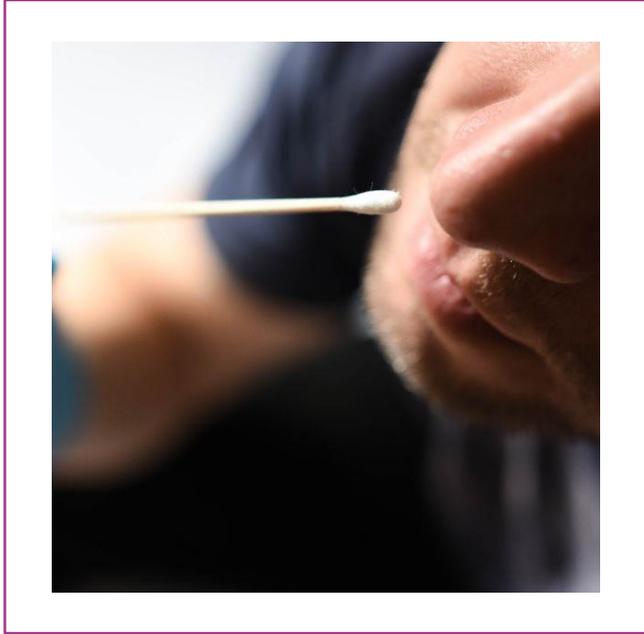
Ōura Ring utilises heart rate variability technology to assess sleep quality, duration and track activity. The app helps consumers predict their 'readiness' to perform for the day and personalises ways to improve sleep quality (US).



## Performance is in the blood

[Supersapiens](#) brings continuous blood glucose monitoring, from diabetes to sports performance. Using Abbott's Libre Sense biosensor, the device and app are able to track blood glucose changes in real time and advise on optimal fuel (US).

# COVID-19 testing has reduced invasiveness barriers for consumers



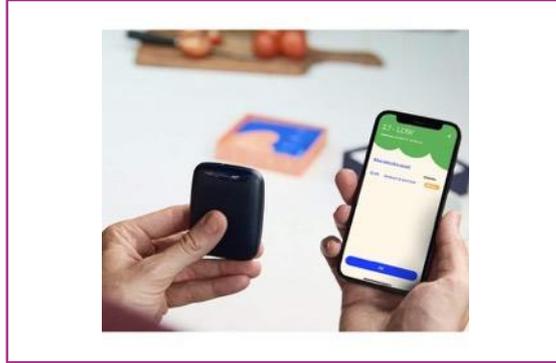
Pre-pandemic, most companies would have struggled to get a consumer to do a home test, such as a blood test, aside from highly motivated consumers. However, the pandemic has forced new behaviours (eg mask wearing, sanitisation), and importantly the use of home lateral flow tests (which involve nasal swabs) to demonstrate their infection status.

This likely means that the invasiveness barrier for other forms of home testing, such as urine tests, breath tests or stool analyses has dropped. Moreover, it opens the possibility for brands to either explore new home testing options to better personalise the health and nutrition needs of clients, or to branch into home testing if they were hesitant before.

# In the US, innovation in sampling, markers and delivery methods abound



**Innovative sampling for bloods**  
Baze offer a personalised range of supplements for a selection of key nutrients commonly deficient in US diets. Notably, they use an innovative blood sampling kit for collection (US).



**Food Marble: On-the-go breath testing**  
AIRE 2.0 by Food Marble allows consumers to test their breath anytime and understand production of methane and hydrogen, the main intestinal gases that cause bloating. The device works with an app to give real-time nutrition advice (Ireland)



**Pre/probiotics and micronutrients**  
Viome gut intelligence uses stool analysis to assess a number of health markers as well as gut health to then create personalised micronutrients and pre and probiotics. Consumers can choose from one-off or monthly subscriptions (US).

# The roadmap to increased home testing

## Pick relevant, proven testing methods

In line with Mintel's Trend *Prove It*, consumers are doing their homework before purchasing. Back up any tests with their scientific underpinnings and support with testimonials from other consumers. Consider using healthcare professionals to support the science, as demonstrated by 'braincare' brand Height's medical board.

## Align with key health and diet trends

Key health and diet trends such as ketogenic and gut health are now mainstream, but personalisation gives a new reason for consumers to engage with them. Non-invasive ketone testing kits by brands such as LEVL or the breath biopsy by Owlstone Medical are challenging conventional ways of engaging with these diets.

## Affordability is key to uptake

60% of Chinese consumers feel it is worth paying more for personalised supplements (eg based on the results of a DNA test) but price is still a major factor in novel product penetration.

UK Kombucha brand [OMBucha](#) offers ongoing home microbiome and DNA tests via subscription with flexible contracts so consumers stay in control.

# Healthcare and nutrition professionals are a vital component in accelerating personalised nutrition



Persona uses healthcare professionals in their brand positioning (US)

Personalised nutrition brands and services heavily rely on the capture and processing of consumer data from a variety of sources. However, an equally important aspect of their uptake and value is making sense of all this health data in simple terms.

*No to Chatbots* suggests that adding more digital interfaces between consumer and brand is not the solution. Instead, as explained by Mintel's *Trend Return to the Experts*, informed human advice, such as from a healthcare professional, is back in fashion, quickly helping consumers get the advice they need.

An example is VMS brand Persona, which leans heavily on its team of medical professionals to support its personalised VMS product line. Following a fully digital lifestyle assessment, a medical professional advises on the final micronutrient formula for Persona's consumers, which is reviewed on an ongoing basis.

WHERE PERSONALISED  
NUTRITION WILL GO NEXT



# Present challenges and opportunities for the future of personalised nutrition

Personalised nutrition products currently have a technological challenge. In order to reach an optimal level of personalisation, there needs to be a step forward in smart devices and health monitoring services that allow for constant data quantification to match the realities of what a consumer is eating and how it affects their health in real time. This is a considerable step forward, given most monitoring services are retrospective (eg blood tests, questionnaires) and very few are real time (eg continuous blood glucose monitoring).

Hence, some markers that are currently popular for personalised nutrition products (eg microbiome testing) may not be feasible in a future of continuous health monitoring.

The challenge and opportunity for brands lies in **finding the combination of markers that give the maximum benefit for minimal invasiveness or work for the consumer**

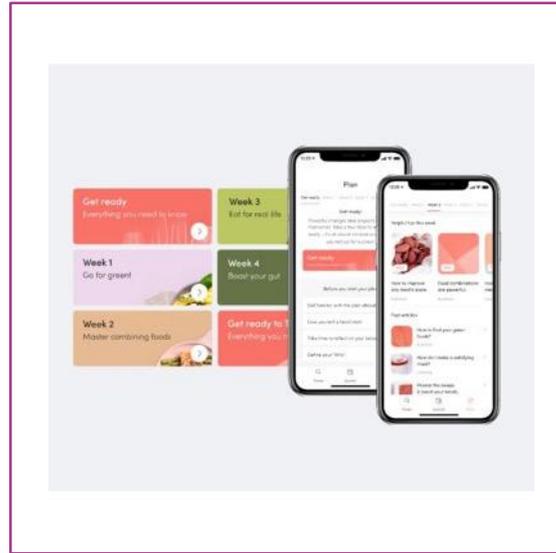


Vitl personalised micronutrients (UK)

# Zoe represents the emergence of 'big data'-driven, multi-variate, predictive and personalised nutrition



ZOE utilises 3 principle health metrics to personalise recommendations



Consumers are provided recommendations via an app

ZOE are a US-based nutrition platform that combines microbiome analysis with blood glucose and blood lipid monitoring to understand the relationship between gut microbes and individualised response to food. Consumer recommendations are provided by an app and supported by a nutrition coach. To use ZOE consumers have to agree to participate in ongoing collated research and this marks a big step in **pooling health data sets to personalise an ongoing service.**

# In summary

## Time to engage with personalised nutrition

Mintel's 2030 Trend *Smart Diets* predicted the ongoing march of personalisation. The market outlook is very strong, with considerable growth for the next few years. The desire for products that are 'designed for me' means that brands can expect consumers to share data in exchange for safe handling and better products.

## Personalised nutrition is diverse and evolving

The sector is split into four main methods of personalisation, dominated currently by quiz-style assessments, blood tests, DNA analyses and exploring the gut microbiome for nutrient interaction. All of these methods are supported by consumers' engagement with wearables (eg smart watches) that help to further personalise the data.

## Where personalised nutrition will go next

Challenges and opportunities exist to provide mass-market personalisation appeal with consumers. However, the major challenge for the future is the technological leap needed to provide more accurate health predictions based on real-time data.

# Meet the Expert



**Rick Miller**

Food & Drink Associate Director  
for Specialised Nutrition

[rmiller@mintel.com](mailto:rmiller@mintel.com)

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