



The Wellness Revolution

Wellness is a booming industry, with nine out of 10 Americans consuming some type of supplement. The global nutrition market is valued at \$6.4 trillion dollars and accounts for 6.03 percent of global GDP in 2023 (Global Wellness Institute)—even larger than the global pharmaceutical sector's \$1.6 trillion valuation (Statista).

How did this happen? The answer is multifaceted: Firstly, the population is aging rapidly. By 2030, one in six people worldwide—1.4 billion—will be over 60. By 2050, this figure is expected to double to 2.1 billion (World Health Organization). Secondly, the global middle class is expanding, with today's 4 billion people projected to reach 5.3 billion worldwide by 2030 (McKinsey). This older, richer demographic is the quintessential

consumer group for wellness products, accounting for much of the industry's growth.

But that is not all. As of January 2025, there are approximately 5.24 billion social media users globally, accounting for 63.9 percent of the world's population. This represents an increase of 206 million users over the past year (SocialBee). These 5 billion users spend on average 2 hours and 19 minutes each per day on social media, where they are bombarded by medical advice and products, ready to be acquired with a simple click. The interplay of these factors has created perfect conditions for an explosion in consumer health care purchases; many want to feel better, can afford it and are now informed about how to achieve it.

Yet, the wellness industry has faced countless critiques, many of them justified. A space with scarce regulation, many products don't work as they are supposed to. As the consumer learns about all the latest scientific innovations, ranging from gut health to quality sleep, real knowledge shines forth as the key to useful purchasing, in opposition to unfiltered information.



The global nutrition market valuation was

\$6.4 trillion

in 2023, accounting for 6.03 percent of global GDP.

Source: Global Wellness Institute

IN THIS REPORT...



JULIO TRIANA |
president of the
Consumer Health Division,
BIAYER

As we look to the future, we're focused on expanding self-care accessibility, leveraging digital innovation and ensuring that our solutions remain affordable and backed by our scientific heritage.



**FLORIAN
SCHATTENMANN** |
CTO & VP for
innovation and R&D,
CARGILL

The challenge with alternative proteins lies in solving a trifecta: taste, cost and nutritional profile. Mycoprotein excels in all three areas. It tastes great, has a meat-like texture, is cost-effective and offers an amino acid profile similar to meat.



DR. AOIFE-MARIE MURPHY |
sustainable nutrition manager,
KERRY

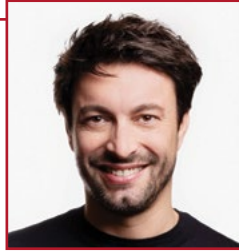
Currently, 30 percent of global food production goes to waste, a stark contrast to the 800 million people who face hunger. By extending shelf life, upcycling food waste and innovating within the biotechnology space—such as precision fermentation—we can help bridge this gap.





We invest in continuous consumer and market analysis to identify unmet needs and adapt our product offerings accordingly, ensuring that our formulations are designed with high-quality ingredients optimized with maximum bioavailability.

NICOLAS BRODETSKY |
CEO, **HAVEA GROUP**



From Niche to Mainstream

To understand the state of the wellness industry, a key question stands out: What caused the wellness market to double in size in just one decade from \$3.4 trillion in 2013 (Global Wellness Institute) to \$6.4 trillion? The answer lies in the heart of the digital revolution. Online spaces not only facilitate retail but have become powerful marketing and community tools.

E-commerce experienced a meteoric rise in the supplement market, growing from 6.7 percent in 2018 to 32 percent in 2020 alone, catalyzed by the COVID-19 pandemic's reshaping of consumer behavior. As Abigail Buckwalter, CEO of Nestlé Health Science U.S., observes, "Traditional retail and institutional health care channels have blurred, with e-commerce becoming a denominator across the full healthcare continuum." Online shopping, enabling purchases from any location, has broken the socio-economic barriers in retail, with quality products no longer exclusive to higher income neighborhoods. Emerson Carnavale, CEO of Sunwarrior, emphasizes this point: "By expanding our distribution, we're meeting people where they shop. This democratization of plant-based nutrition allows consumers to choose healthier options. (...) Our website ensures fast delivery, with most orders arriving within two days."

Digital retail has also attracted younger consumers. "Consumers are taking a more proactive approach to health, often starting in their 20s rather than their 40s or 50s," says Racquel Harris Mason, North American president at Lipton Teas and Infusions. Meanwhile, Bernardo Medeiros, VP, Lubrizol Life Science, points out that younger generations are also entering markets like skincare and nutraceuticals: "For instance, we've observed teenagers using anti-aging products—something that was unheard of a decade ago." Given the ubiquity of online shopping, Stewart Schaefer, CEO of Sleep Country, says, "The term 'omnichannel' may soon become obsolete—if you're not seamlessly operating across both physical and digital spaces, you will be left behind."



ABIGAIL BUCKWALTER |
CEO, **NESTLÉ HEALTH SCIENCE U.S.**

One of the most significant opportunities lies in closing the gap between lifespan and healthspan. People are living longer, but that doesn't always mean they are living healthier.



MAY YAMADA-LIFTON | CEO, **MAYPRO GROUP**

The pandemic shifted consumer awareness in the U.S. toward preventative care, which drove growth in supplements focused on longevity, sleep, stress, cognition, and beauty. Americans are now "hacking the system" to live healthier, longer lives, and that innovation complements Asia's long-standing tradition of using natural ingredients medicinally.



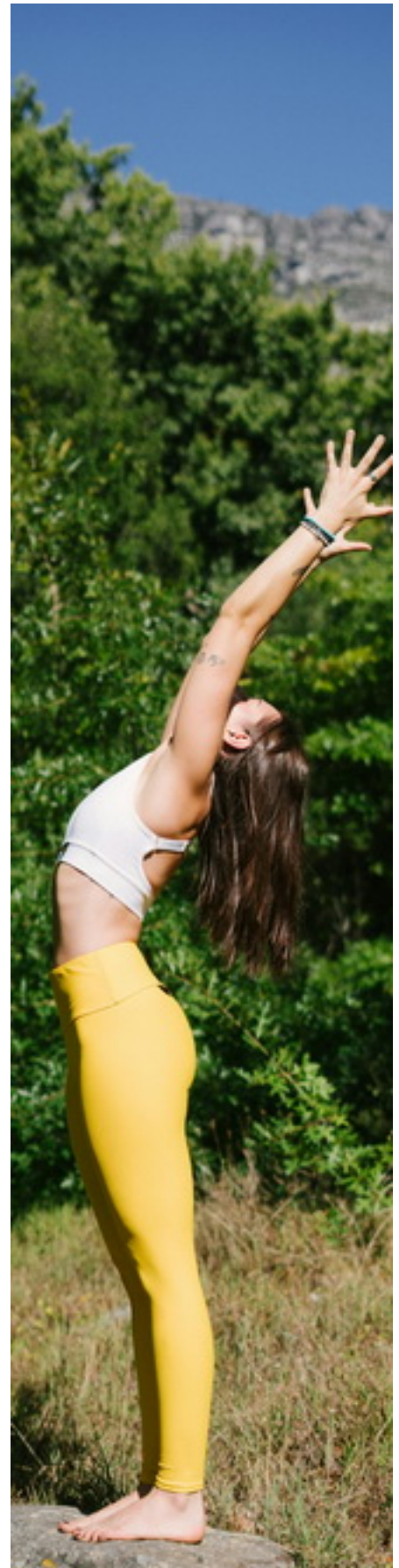
ULRICH IRGENS |
general manager, **GNOSIS BY LESAFFRE**

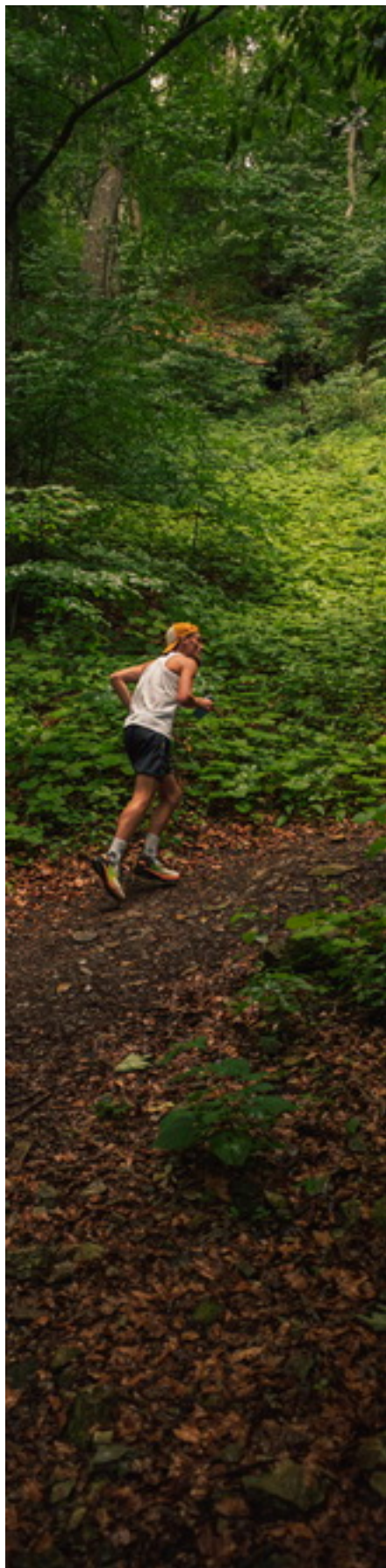
Doctors often receive little to no education on nutrition or supplementation as part of their training. This creates a knowledge gap that we need to address by arming healthcare professionals with better information.



RACQUEL HARRIS MASON |
North American president, **LIPTON TEAS AND INFUSIONS**

By partnering with influencers who genuinely believe in our products, we can reach diverse audiences and let each community hear from ambassadors who incorporate tea into their daily lives.





At BFree, our mission is rooted in offering freedom and choice. We've worked to create products that not only meet safety standards for celiac consumers but also offer taste, texture, and functionality comparable to conventional baked goods.

ALEX MURPHY |
CEO, **BFREE FOODS**



But the most conspicuous agent of the industry's growth is social media. Each time we open TikTok, Instagram and the like, we are bombarded by products, medical advice and opinions from doctors, gurus and influencers. Over 40 percent of consumers report that information from social media affects how they manage their health, and approximately 69 percent of consumers trust product recommendations from influencers they follow.

Julie Boyster, CMO of LifeVantage, highlights that this supports new forms of business like Instagram broadcast channels, "where influencers engage smaller, segmented audiences on specific topics, such as their supplement regimen or wellness journey." Emerging channels are also making an impact, with Loren Israelsen, founder and president of United Natural Products Alliance (UNPA), noting, "TikTok's e-commerce feature, TikTok Shop, is also becoming relevant in the space."

With sophisticated digital marketing and educational content, direct-to-customer e-commerce, brands are accelerating market growth. Valued at approximately \$48.51 billion in 2023, the global vitamins and supplements market is projected to reach \$84.95 billion by 2030, according to Grand View Research, with a compound annual growth rate (CAGR) of 7.3 percent. Bombarded by information in this self-reinforcing cycle of consumer engagement and market expansion, how do we separate the wheat from the chaff?

Beyond the Label

According to McKinsey, 82 percent of U.S. consumers consider wellness a top priority. Yet, global health—or lack thereof—is nothing short of a catastrophe. As of 2022, some 16 percent of adults worldwide were living with obesity, according to the World Health Organization. The figures are even starker in the United States, where 40 percent of adults were classified as obese in 2024, according to the Trust for America's Health (TFAH).



BERNARDO MEDEIROS | VP, **LUBRIZOL LIFE SCIENCE**

Key regions include Southeast Asia, Brazil and China. These markets are experiencing rapid development, with more consumers prioritizing health and wellness.



YANICK WILSON | chief people officer, **PRIMIANT**

Our \$700 million investment into sustainable production exemplifies the trust and vision from our private equity firm, KPS partners. The hope is to positively impact job satisfaction and morale, as we continue to create new roles and modernize decades-old machinery.



CHRIS TEDESCO |
chief marketing officer North America, **RECKITT**

There's been a significant shift toward self-care, with nearly 90 percent of U.S. consumers using OTC products annually and over 70 percent incorporating vitamins and supplements into their routines.



CASSIE SMITH |
senior editorial content director, **SUPPLYSIDE**

Consumer interest in wellness has grown exponentially, particularly in areas like supplements and gut health. This shift stems from a broader cultural recognition that maintaining health is more effective than treating illness.



Tea is a natural healthy choice—the perfect balance of delicious refreshment, wellness, and fun. There is a type of Lipton tea for everyone to enjoy, for every occasion.

RACQUEL HARRIS MASON |
North America president,
LIPTON TEAS AND INFUSIONS



of exploitation. However, these conditions also present an opportunity for brands to differentiate themselves via scientific diligence. In this space, exemplary brands are pushing the boundaries of science, from GLP-1 to gut health.

Thorough product testing is the bedrock of this. Anthony Weston, CEO of SuanNutra, notes that all their products are “backed by at least two clinical studies, with flagship products like Metabolate supported by as many as eight studies.” Similarly, Antonio Delgado, CEO of Natac, describes how their rigorous HABOID system “verifies the origin and identity of each plant we use, addressing factors like geographical source and plant variety.”

Paul Gilner, CEO of Life Extension, says the company’s main ethos is “independent science, not trends” and adds, “all our products are tested, and our customers are able to request a Certificate of Analysis on any product.” Chris Tedesco, chief marketing officer North America of British giant Reckitt, says that the company meets medical standards with a “science-driven approach and investments in high-quality manufacturing, such as our GMP-certified facility in Salt Lake City.”

▶ This raises the question of product efficacy: Do supplements work? While the FDA requires pharmaceutical drugs to clear rigorous clinical trials to prove safety and efficacy, supplements do not require pre-market approval. As long as they do not contain prohibited substances, they can be sold to consumers.

These conditions have enabled fake products to proliferate. Jim Emme is the CEO of NOW, which runs an “industry self-policing program” to debunk ineffective products. “We discovered products being sold at impossibly low prices,” he says. “Some contained as little as 30 percent of the labeled CoQ10 content, while others were entirely fraudulent, using fillers like rice flour.”

Anton Oražem, CEO of PharmaLinea, says regulatory variance across markets is an issue: “While Europe has stringent regulations, other regions may lack oversight. In some cases, this leads to companies exploiting regulatory gaps, resulting in low-quality products and even safety risks.”

Low-quality products damage trust in the industry and can exacerbate health inequalities, with consumers in unregulated regions at greater risk

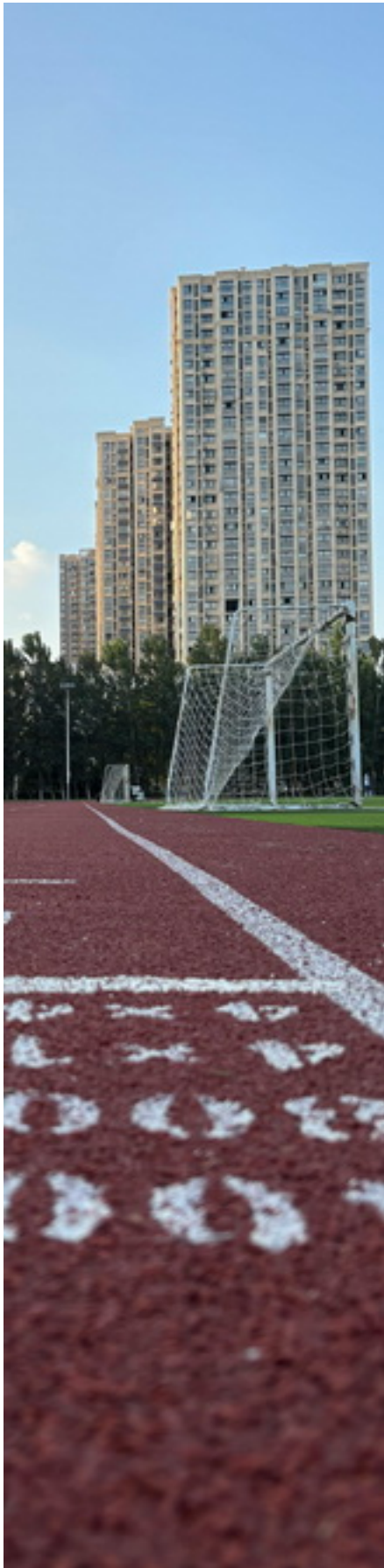
Several companies support systemic change by advocating for extra transparency. Patrick Brueggman, CEO of Vitaquest, welcomes frequent audits: “We are audited frequently by customers—sometimes every other week—for one- to three-day sessions. While they are time-intensive, we welcome them as part of maintaining transparency and trust.”

Brands are being held to account by an informed public, says Nicolas Brodetsky, CEO of Havea Group: “There is increasing emphasis on products supported by robust clinical evidence from the customers themselves.”

GLP-1 & Protein

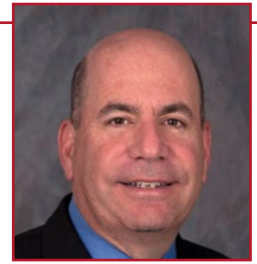
In 2024, prescription obesity and diabetes drugs like Wegovy, Ozempic and Zepbound became blockbuster sensations, helping patients to drop up to 25 percent of their weight in one year by stimulating production of the appetite-regulating GLP-1 hormone. Pharmacies ran out of stock, a black market emerged on Facebook, American politicians accused European drugmakers of price gouging, and gaunt celebrities were blasted online for having “Ozempic face,” as patients and consumers scrambled for ‘easy’ weight loss.





The cornerstone of our organization has always been education. Since our inception, we have aimed to inform customers with the latest health information and to offer science-based, high-quality supplements to help them live healthier and longer lives.

PAUL GILNER | CEO, **LIFE EXTENSION**



Fast forward to 2025, and low-cost nutraceuticals that mimic or complement these pharmaceutical-grade medications are in high demand. “The cost of GLP-1 treatments in the U.S. makes them inaccessible to many. Nutraceuticals can fill this health security gap by offering affordable alternatives,” explains ABF Ingredients CEO, Jeremy Xu.

Supplement companies are riding the big-pharma wave. New Zealand-based Calocurb, for example, uses a bitter hops extract called Amarasate to boost the body’s own GLP-1 production by 600 percent, with what CEO Sarah Kennedy calls a “targeted, natural approach for those seeking less invasive solutions.” U.S.-based Ingredients by Nature produces a citrus-derived ingredient, Eriomin, which lifts natural GLP-1 levels, and president Rob Brewster asserts: “GLP-1 is not going away—it’s a game-changer.” Meanwhile, legacy brands like Atkins have found a second wind as a “sustainable off-ramp” for GLP-1 pharmaceuticals, explains Geoff Tanner, CEO of Simply Good Foods, the parent company of Atkins.

Prescription weight-loss drugs can be transformative, but significant side-effects, like reduced protein intake, dehydration and nausea, can be deterrents. As a result, functional foods that help maintain low fat-to-muscle ratios—once a niche market for athletes—are having a renaissance. Quest, for instance, the sister brand to Atkins, has launched high-protein, low-sugar, low-carb muffins and chips which—according to Tanner—taste exactly like their oily, salty counterparts. “These macronutrients are now something all consumers, especially younger generations, are seeking,” he explains.



MARKO ROSA |
CEO, **HEALTH THRU NUTRITION**

Pharmaceuticals focus on specific conditions, with consumers trusting doctors’ recommendations without scrutinizing the ingredients. In contrast, nutraceuticals are elective purchases, with consumers meticulously examining every detail, from ingredient sourcing to formulation.



FRANCIS COOKE |
CEO, **TASTE OF NATURE**

We’ve invested heavily in R&D to ensure our offerings stand out. For example, creating a protein bar that meets multiple dietary preferences, like paleo or keto, at an attractive price point, requires both scientific expertise and manufacturing ingenuity.



PEDRO GONÇALVES |
VP of marketing for U.S. and Canada, **TETRA PAK**

Much of the milk and cheese in the U.S. is processed or packaged using Tetra Pak sterilizers and equipment. For instance, 60-70 percent of the cheese used on pizzas in the U.S. and much of the ice cream production involves our equipment.



ANTON ORAŽEM |
CEO, **PHARMALINEA**

Hydration’s role in overall health is increasingly recognized, and even pharmaceutical companies are now developing hydration products.



FREDERIC BONED |
senior vice president and
general manager human nutrition & health,
BALCHEM

We've invested in extensive research on choline, a lesser-known but essential nutrient, promoting brain, metabolic and epigenetic health.



PHILLIP MILLS |
CEO, **LES MILLS**

Gym attendance has undergone significant growth since the 1960s, increasing from roughly 1 percent of the population to about 30 percent today, with even higher numbers among younger generations.



ROB ROGERS |
CEO, **KETONE LABS**

Historically, achieving significant ketone levels required adherence to a strict low-carb or ketogenic diet. With our supplements—offered in powders, gummies, capsules, gels or drinks—individuals can now access the benefits of ketones without the need for restrictive dietary changes.

► At the same time, plant-based proteins continue to gain ground on animal proteins. Over the past five years, \$4 billion has been invested in developing novel ingredients from barley protein to vegan eggs, according to the Good Food Institute. For example, precision fermentation enables protein identical to cow's whey to be made from plant sources instead of dairy, using 'programmed' microbes. Additionally, fungi proteins like Fermotein from LBB Specialties' partners at The Protein Brewery can be grown at scale with near-zero carbon emissions.

Florian Schattenmann, CTO of global food corporation Cargill, calls cost-effective plant-proteins a matter of food security. Though well-established in Europe and the U.S., "Asia presents a complex picture," he says, "with India already leaning heavily on plant proteins, and other countries adopting them sporadically as a meat substitute." The

challenge for alternative proteins, he asserts, is solving a "trifecta" of taste, cost and nutritional profile. Of the three, cost will be the glass ceiling in 2025. Bioengineered food is still out of reach for low-income regions, says Borealis Foods CEO Reza Soltanzadeh, highlighting that "many innovations in food science focus on premium markets."

Brain & Gut

Since 2007, Google searches for the term "gut microbiome" have increased by 1,400 percent, according to a study in *Nature*. Today, good gut health has become a popular obsession, promising to fix everything from acne to depression, and 41 percent of Americans say they took over-the-counter probiotics in 2024 (Ipsos). As more people shop for their gut, how are our supplements evolving?

Probiotics may be ubiquitous in household fridges—but companies like SIG are now engineering gut-health products that are resilient without refrigeration. "These encapsulated probiotics are given a short-exposure high-temperature treatment so they can remain dormant until consumed," explains CMO Christoph Wegener. Alternatively, your jar of lactobacillus may soon be replaced by a new-generation 'postbiotic' product. "Postbiotics, which are inactivated strains, offer the same health benefits as probiotics without the challenges of shelf stability or variable individual responses," explains Douglas Lynch, founder of MarketWell Nutrition.

Other companies like ADM are zeroing in on the gut-brain axis. Vaughn DuBow, senior director of ADM's Health & Wellness portfolio says "psychobiotics" are an emerging focus, with "potential indications for sleep, weight management and digestive health." Asia's long-standing traditions in using natural ingredients medicinally are also gaining traction in the U.S., with Americans "hacking the system" to live healthier, longer lives," says May Yamada-Lifton, CEO of Maypro Group, which operates between Japan and the U.S. She notes that Asian remedies for longevity, sleep, stress, beauty and cognition are especially popular.

Indeed, cognitive health is top of mind for many. Two out of three Americans experience cognitive impairment by age 70, according to a study in *SSM - Population Health*, while older adults cite good brain health as a top concern (AARP). In response, brands are offering clinically proven brain benefits at over-the-counter prices, such as Haleon's Centrum Silver multivitamin and Nutriventia's ashwagandha-based supplement Prolanza. Meanwhile, companies like Vitabiotics are tapping into younger demographics with cognitive gummies for gamers who value fast reactions.



Technology, Packaging & Delivery Systems

While supplements make a splash in the gaming-verse, digital technology is shaping the wellness space. “Machine learning, artificial intelligence and generative AI are helping us rethink everything from personalized nutrition to pharmaceutical manufacturing, from operational efficiency to supply chain optimization,” says Karan Singh, managing director of ACG.

Nearly one in three U.S. millennials say they prefer personalized products and services, according to McKinsey, and wellness products are adapting. Your bed, for instance, will one day monitor your body processes. “A mattress I was testing warned me that my heart rate had dropped dramatically. It turned out my dog was on the bed, but it highlights the potential of AI in personalizing sleep environments,” says Stewart Schaefer, CEO of Sleep Country, which is developing “AI-driven duvets and pillows” that adjust based on body temperature and sleep pattern.

At PB Leiner, CEO Alexis Bortoluzzi says AI is helping to cut waste and optimize blending processes for gelatin—“similar to creating blended whiskeys.” Haleon has recently launched Panadol’s Health Inclusivity Screener Tool, an AI-powered tool “designed to improve representation across our digital advertising content,” says CMO Tamara Rogers. Elsewhere, Bayer is using AI to slash product development and manufacturing timelines and “understand consumer behaviour and preferences at an unprecedented scale,” explains Julio Triana, president of the Consumer Health Division.

Delivery-platform technologies are levelling up, too. Pills are out; capsules, gummies, gels and food-additives are in. “No matter how



At Health Thru Nutrition, we combine science, innovation and sustainability to craft superior supplements. As pioneers of PQQ, we deliver clinically validated solutions that empower wellness and support mitochondrial health and energy production.

**MARKO ROSA | CEO,
HEALTH THRU NUTRITION**



effective a product is, people will not stick with it if the experience is unpleasant,” says Julie Boyster, CMO of LifeVantage, which offers liquid collagen in small, refrigerated shot glasses with natural flavoring, and GLP-1 activators as a drink or baking mix-in. Delivery systems are a big conversation in the industry, with consumer pill fatigue likely to shape product sales in 2025. According to Nutrition Business Journal, the market for chewable gummy vitamins is now worth over \$7 billion, outstripping pills, as consumers increasingly shop for taste, color and experience.

Making gummies is a notorious challenge, as sensitive ingredients are at risk of being destroyed under high temperatures. Many brands are therefore holding back until the technology improves, while others, like Funtrition, are experimenting across gelling agents and formats: “Gelatin provides elasticity, while pectin is more temperature resistant. We’re working on liquid-center gummies which allow us to incorporate heat-sensitive activities,” says GM Joel Minski.



**MATTS JOHANSEN |
CEO, AKER BIOMARINE**

Krill oil is a multi-nutrient that is naturally made up of high-quality omega-3 EPA & DHA, choline and an antioxidant called astaxanthin. It is unique because it’s naturally bound to phospholipids, unlike other omega-3 sources, resulting in three-times-better absorption.



**ALEX MURPHY |
CEO, BFREE FOODS**

Awareness of gluten-free diets has expanded significantly in recent years, moving beyond the core celiac community to include consumers who choose gluten-free for perceived health benefits.



**FRANCK UEBERSCHLAG |
executive vice president for
product management,
JUNGBUNZLAUER**

Affordability and sustainability are critical challenges. Since our production process is based on corn, we’ve developed ways to upcycle byproducts, maximizing output and minimizing waste.



**DR. HONGWEI WANG |
CTO, BIOGROWING**

Each probiotic strain we develop is designed with a particular health benefit in mind, similar to how you might select a specific type of tree to repopulate a forest. For instance, we have strains that are heat-resistant, allowing them to survive in products like coffee or baked goods.





I strongly believe that to lead effectively, CEOs must also be part cultural anthropologists—constantly observing, engaging and understanding the industry and consumer behavior. It's not just about the what, but more importantly, the why behind it.

**ABIGAIL BUCKWALTER | CEO,
NESTLÉ HEALTH SCIENCE U.S.**



As new formats emerge, preservation technologies suited to delicate bioactive substances are coming into their own. Freeze-drying, for example, is being used by companies like Oregon Freeze Dry to boost product stability, potency and viability. “The process is inspired by the ancient practices of the Incas, who discovered that high-altitude cold drying could preserve vegetables,” explains CSO Walt Pebley. International Flavours and Fragrances (IFF) is also marrying biotechnology with vegetables to “create natural umami flavors from upcycling carrot production byproducts,” according to CEO Erik Fyrwald.

Fully bioengineered edibles are part of a new category unnervingly titled “new food.” “New food includes sub-categories like biomass, where byproducts such as microorganisms from beer production are turned into sustainable plant-based foods,” explains Pedro Gonçalves, VP of marketing at Tetra Pak. The Swedish multinational is investing in biomass on the outside of products as well as the inside, with a breakthrough in eco-friendly barrier materials in the pipeline. “Traditional solutions are often difficult to recycle and have high carbon footprints. The goal is to have our paper-based barrier technology ready for widespread use by 2030,” says Gonçalves.



Smaller companies like U.K.-based Ethical Nutrition are also championing green standards with 100 percent paper packaging and shipping materials, while bio-industrial service providers like Mérieux Nutrisciences help others to break up with plastic by offering accelerated product testing for compostable packaging. “For food companies looking to shift from chemical to natural ingredients, those services quickly ensure safety and shelf stability while assessing the environmental impact,” says CEO Nicolas Cartier.

The future of everyday wellness, then, is one of personalized testing services, body-tracking devices and tailored supplements. It's an era in which we bake, drink, chew and snack on bioengineered plant-based nutraceuticals. One where social media communities are the repositories of health information, and digital marketplaces rule the retail space with vast choices and rapid global delivery. The industry will be led by those who thrive in this new landscape.



As the industry shifts toward healthier options, we push development in sustainable and plant-based products by socializing technology and collaborating with our partners' labs to create innovative products.

**THOMAS VAN VALKENBURGH |
president & CEO,
LBB SPECIALTIES**



**JAMES P. ZALLIE |
president & CEO, INGREDION**

The ability to harness large language models and predictive analytics will revolutionize the food industry. (...) This predictive power will enable the creation of healthier, more palatable foods tailored to individual dietary needs, paving the way for personalized nutrition.



**JOHN FERRIS |
executive vice president, consumer,
BAUSCH + LOMB**

Digital technology is transforming health care, and eye care is no exception. Increased screen usage has contributed to a rise in eye strain and dry eye symptoms, while digital tools can facilitate self-monitoring and proactive eye care management.



**RANJAN SINGH |
co-founder & CEO, HEALTH HERO**

Health care is at the early stages of its digital transformation, much like banking and travel industries were decades ago but, in the future, routine consultations, prescriptions and diagnostics will be predominantly digital.



**TEJ LALVANI |
CEO, VITABIOTICS**

A 48-week trial on 481 HIV patients with our Immunace supplement, conducted with the London School of Hygiene and Tropical Medicine, showed an over 50 percent reduction in mortality rates in those with the lowest CD4 counts.