



Euromonitor
International

Navigating Rapid Growth in Beauty-Positioned Consumer Health Supplements

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EXECUTIVE SUMMARY

Why read this report?

Key findings

INTRODUCTION

Beauty supplements are growing rapidly, as the line between health and beauty blurs
As appearance becomes the visible proxy for health, consumer health growth is shifting
Beauty positioned products will drive future growth in the consumer health industry

BEAUTY SUPPLEMENT CONSUMERS

Health-beauty convergence and an ingredient-led beauty trend are fuelling the sector
Identifying opportunity groups through demographic and lifestyle segmentation
A primal aspect sits within the rise of online dating, making facial skin health critical
Demographic groups prioritise different beauty concerns, changing as they get older
Many motives causing beauty to rise have long-term drivers that are far from fleeting

PRODUCT AND INGREDIENT TRENDS

Beauty supplements: Key mechanisms and ingredients
Consumers are increasingly informed and sceptical of claims, making credibility critical
Ingredients listed on SKUs supporting beauty claims increasingly include NAD+
Gelita's VERISOL® collagen peptides improve bioavailability, supporting brand credibility
NAD+ player TRU Niagen launches beauty line product with its patented NR ingredient
The skin health benefits of vitamins are being revisited with a fresh perspective
Consumers' awareness of the gut-skin axis boosts trust in probiotic's beauty benefits
Sports nutrition also adds beauty benefits, reflecting the rising focus on holistic demand
Vital Proteins is one brand very clearly leaning into the crossover of beauty into sports
Ingredient science with proof is the needed answer to a rising wave of disbelief in claims

COMPETITIVE LANDSCAPE

Beauty-orientated brands now reach USD1.1 billion in online dietary supplement sales
Nestlé's Vital Proteins broaden its reach through TikTok influencers
Unilever's Nutrafol caters to various hair health needs across different segments
Five Doctors in China focuses on low-molecular collagen peptides
Geographies: China and the US remain the primary markets, but growth has slowed
South Korea shows an increasing pace of ingredient, message and format innovations
Retail growth: Beauty supplements critical for all specialists seeking growth in health
Indian beauty retail specialist Nykaa acquires the wellness brand Nudge
Holland & Barrett overhauls UK health stores for beauty after running trials
L'Oréal and Shiseido pivot strategies to be holistic and healthspan orientated
L'Oréal create a complete approach that is harder to disrupt via attacking one element
Consistent success factors drive the beauty supplement brands that are winning in 2025

CONCLUSION AND RECOMMENDATIONS

Develop a strategic roadmap for growth as beauty claims gain broader penetration
Investment is needed, but growth and lifetime healthspan shopping value are extreme
Closely monitor innovation trends, competitors and partners
Evolution of beauty supplement
Questions we are asking

APPENDIX

Beauty supplement value chain market map
Beauty-focused supplement brands (a curated list of known brands, not exhaustive)

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/navigating-rapid-growth-in-beauty-positioned-consumer-health-supplements/report.