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Wellness In 2024: Expect Growth Fueled By Digital And AI-Powered Personalization

by [HBW Insight Team](#)

Wellness industry leaders and experts on key trends and priorities in 2024.

Plant-based offerings and personalized, AI-based solutions are expected to fuel continued momentum in the global wellness market in 2024, industry sources expect.

Wellness continues to grow on the strength of post-pandemic trends as consumers taking ownership of their health and wellbeing seek innovative solutions from trusted brands.

Pharmavite is counting on women's health and ever-increasing enthusiasm for vitamin gummies to drive growth in 2024 and beyond. (Also see "[Pharmavite Sitting Out Trendy Spin-Off Dance](#)" - HBW Insight, 4 Dec, 2023.)

Private equity-backed Olyos Group, led by France's EA Pharma, aims to tap swelling demand for prevention, immunity, wellbeing and anti-aging in emerging markets, an opportunity it says is enabling "smaller local jewels to compete with big pharma companies." (Also see "[EA Pharma Enters US And Launches Olyos Group](#)" - HBW Insight, 29 Nov, 2023.)

"Blue Zone thinking," synergistic ingredient combinations, CBD regulatory clarification – read below how wellness industry leaders and experts responded to our prompt:

"2024 will be the year of..."



Luca Bucchini

Managing Director

Hylobates Consulting Srl

... political changes that will impact strategic decisions for brands.

European elections will bring a new European Parliament, projected to include many new, inexperienced MEPs with unpredictable views, and a new European Commission. The von der Leyen Commission, which is heading for the exit, did not pay much attention to food supplements and failed to make much progress in defining proportional rules for the products. Such progress would open up the potential of a market that is, on paper, larger than the US market.

From a practical standpoint, food supplements brands investing in the EU will find out whether they can count on a single market for the same supplement, or whether they will face further national requirements that make a EU-wide strategy pointless. So, summer 2024 will be a time for reading the tea leaves and planning ahead.

Across the Channel, on the other hand, especially if there are elections, we will see if the UK decides to further diverge from the EU, which – depending on how it is done – will either provide opportunities or create a lot more hurdles than there are today.

Read more from Bucchini on [what's at stake for the dietary supplement sector](#)

in EU elections in 2024.



David Pineda Ereño
Managing Director
DPE International Consulting

... safety assessment of botanical ingredients.

While the EU list of authorised novel foods provides the detail as regards the conditions of use and marketing of the permitted novel foods and ingredients, the Novel Foods Catalogue provides orientation to all stakeholders on whether a food or ingredients will need an authorization as novel food. The Novel Foods Catalogue, which is managed by the European Commission, is very much followed for guidance by EU Member States.

The European Commission has reviewed regularly the Novel Foods Catalogue due to the inconsistencies found on how some EU Member States interpret at national level the novel food status of some ingredients. In this respect, many plants on the national lists of plants authorized for use in food supplements in

Belgium, France and Italy are now considered as novel ingredients due to the revisions undertaken particularly by Belgium.

Another key development worth monitoring in the year ahead is the current regulatory trend on the scrutiny and evaluation of the safe use of botanical ingredients in fortified foods and food supplements. Article 8 of Regulation (EC) No. 1925/2006 on the addition of vitamins and minerals and of certain other substances to foods provides a procedure on the basis of which substances may be prohibited or restricted from use in fortified foods and food supplements. The list of substances other than vitamins or minerals, particularly botanical ingredients, that are being prohibited, restricted or put under scrutiny is being extended under the request of EU Member States. The European Food Safety Authority (EFSA) is due to carry out safety assessments on a number of botanical ingredients, and some EU Member States are already banning or restricting the use of botanical extracts in fortified foods and food supplements.

Read more about how the European Parliament is looking to [kick-start botanical health claims assessment](#) in 2024.



Tobe Cohen

Chief Growth Officer
Pharmavite

... immense innovation within the vitamin and supplement space.

Consumers remain invested in their health and wellness and are seeking high-quality, science-backed solutions to support their journeys to healthier living. As a pioneer in the industry and maker of Nature Made vitamins, Pharmavite is continually innovating to support ever-evolving vitamin and supplement routines by delivering on the latest trends, and 2024 is no exception.

Looking at the year ahead, we anticipate continued focus on supporting historically underserved categories, such as women's health. This is a key priority for Pharmavite as we remain committed to bringing the gift of health to life for all and, in November of 2023, we acquired Bonafide Health, the women's health company creating a new standard in managing the journey of menopause, for \$425M. With recent studies indicating that 73% of women don't treat menopause symptoms, and 57% indicate a preference for natural remedies over conventional pharmaceuticals to maintain health, this acquisition signals a new era of innovation and science-based solutions in women's health and cements Pharmavite as the nation's leading women's health nutraceutical company. Bonafide joins our existing portfolio of women's health brands, comprised of Uqora, a unique urinary tract health brand, and Equelle, the only supplement with S-equol that is clinically shown to naturally address the root cause of symptoms related to estrogen decline.

We also continue to experience significant growth with VMS forms that offer a more personalized, sensory-forward consumption experience for consumers, such as drink mixes, chews, and gummy vitamins. For context, gummy vitamins were the #1 VMS form in 2022 and continue to be the fastest growing segment in the VMS space, doubling in size since 2019. With approximately 45% of households using gummies, we anticipate they'll be a third of the category by 2025. As such, Pharmavite recently broke ground on a new facility that will manufacture this form for its Nature Made and MegaFood brands and be the site of our Gummy Innovation Center of Excellence, which focuses on

product research and development.

The overarching societal shift toward embracing a more proactive approach to healthier living has reaffirmed the concept of harnessing the power of plants to support health and wellness. From our MegaFood brand launching more than 50 varieties of whole food supplements designed for men, women, and children, to the rapid integration of Mushroom-based supplements into mainstream wellness, plant-powered solutions have piqued the interest of VMS consumers and are seemingly here to stay as we look to 2024 and beyond.

Read UK health food retailer Holland & Barrett's [wellness trends to watch](#) in 2024 and how [ethical sustainability](#) is likely to factor in M&A this year, according to L.E.K. Consulting.



Melissa Snover
Founder and CEO
Rem3dy Health

... tailored healthcare.

Traditionally, off-the-shelf healthcare has followed a one-size-fits-all model, but in 2024 I think we'll really start to see tailored e-commerce solutions dominate the market.

We're already experiencing a shift towards personalized products that tackle specific issues highlighted by the user, as opposed to multi-use products that simply can't take variable factors and needs into account.

As consumer's understanding of their own health and wellbeing grows, so too will the demand for unique, custom-made products that tackle their concerns – not everyone else's.

Not only does this give consumers the power to find products that truly work for them, but it also helps to create lower waste with more sustainable practices as products are made directly in response to demand.

For Rem3dy Health, we'll continue to optimize our patented 3D printing technology that allows us to create truly personalized nutrient gummies, on demand and to mass scale. Our offer is centered around providing customers with innovative nutritional solutions that are specifically designed to help each of them as individuals – with their lifestyle, diet, health and goals all taken into account.

Read about [UPSA's stake in Rem3dy Health](#) to launch a new range of 3D-printed gummies.

**Sebastián Romero Melchor**

Partner

*Food Compliance International***... personalized nutrition and plant-based food.**

Over the last decade artificial intelligence has entered our lives gradually and keeps on its broad expansion. Food supplements are already being caught in this net, and the new technology will play a key role in the innovation of this market segment. Through AI, tailor-made food supplements are coming to life offering the best solution possible to meet consumer's needs. The supplement industry is going to take advantage of AI technologies by discovering innovative ingredients and blends that can offer enhanced benefits and through ever-focused personalized nutrition.

We also expect the EU Court of Justice to finally adjudicate on whether EU countries can legitimately prohibit the use of animal-origin food names for plant-based food (think of 'soy sausages'). This judgment will bring long-awaited clarity to the growing plant-based industry.

Read about how consumer health companies like Bayer are investing in technology to help [personalize wellness](#).



Thierry Verne
CEO
Olyos Group

... growth in the emerging markets and dietary supplements.

Emerging markets with very large populations and growing income per capita represent a growing demand in health and personal-care products.

The time to market has been significantly accelerated thanks to big global e-commerce retailers, removing time, cost, and complexity barriers.

Artificial intelligence and machine learning will also help for faster new product development with qualitative and tailored formulas fitting different consumers' needs per region.

Worldwide consumers' expectations in prevention, immunity, wellbeing and anti-aging will ensure dietary supplements growth for the decades to come.

So opportunities for food supplement companies to serve more consumers in more parts of the world will increase drastically, allowing smaller local jewels to compete with big pharma companies.

Read about immunity, still a leading (if declining) reason why 74% US adult consumers use dietary supplements, according to the [Council for Responsible](#)

[Nutrition's 2023 Consumer Survey.](#)



Per Rehné

CEO

Clasado Biosciences

... synergistic ingredient combinations.

Transformation is happening in how health and wellness products are formulated, and stepping into 2024 the shift is towards synergistic ingredient combinations. While single-ingredient nutraceutical solutions have been the go-to for targeted health outcomes, and remain an important path for new product development, a growing focus on synergistic combinations may redefine how health products are conceptualized, studied and commercialized.

The advantage of this approach, and one that will prove particularly attractive to today's engaged health audience, is the multi-purpose benefits on offer that address a wider spectrum of health areas, from gut and digestive health to energy, immunity and beyond. A great example of this currently gaining

market traction is the synbiotic category, combining prebiotics and probiotics into one product. At Clasado, we have recently launched scientifically studied synbiotic combinations with partner Probi AB, utilizing our prebiotic ingredient Bimuno GOS, to make scientific backing more accessible to formulators than ever before.

To capitalize on the growing market for synergistic products, it's vital that science remains at the heart. Being able to demonstrate researched proof that ingredients can work together to deliver benefits is key, which can be very different to understanding the ingredients in isolation. This is why we placed a strong focus on evidence when launching our synbiotic combinations with Probi AB; doing some of the 'legwork' for formulators unlocks faster speed to market for scientifically substantiated products. Whether it's multiple mechanisms in the same health area, or supporting numerous different aspects of wellness, consumers want to be assured that the synergistic products they choose are backed by scientific evidence.

Across the global market, consumers are switching on to the benefits of better gut microbiome health, and the market has never been more abundant with opportunity. For 2024, we expect to see formulators exploring how synergistic combinations are connecting directly with the needs of an informed and proactive health audience. This is not just in the form of synbiotics, but also combinations such as prebiotic fibre and postbiotics, but will also extend to area such as prebiotics with other nutrients, such as vitamins and minerals. When you focus on improving the gut microbiome, the benefit from combinations could be near limitless.

Read about Clasado's deal with [Swiss functional ingredients supplier Phytonet AG](#), a milestone in its international expansion strategy, providing access to 14 new markets, including Japan.



Jérôme Le Bloch
Head of Scientific Affairs
FoodChain ID

... clarification on the status of cannabidiol (CBD) in food supplements.

In Europe, CBD is a non-authorized novel food, with more than 40 applications validated by the European Commission and under assessment by EFSA. These applications are on hold, EFSA waiting for clarifications and further data to complete their evaluations. For most of the food business operators, the deadline to provide new data is June 2024. We can therefore hope to have indications on the possibility of using CBD in food supplements before the end of the year.

In the US, 2024 may be the year in which the regulatory framework applicable to CBD will be decided by the FDA and Congress, paving the way for clarifications on the status of this ingredient in high demand by consumers.

Read our interview with Mark Tallon at Legal Foods on the European Food Safety Authority's review of [reproductive or developmental toxicity data](#) that has stalled progress on CBD novel food applications.



Jonathan Miller
General Counsel
US Hemp Roundtable

For the US Hemp Roundtable, 2024 will be a year of pivotal opportunities. While the dynamics of Congress and the approaching election pose uncertainties and potential challenges, the hemp industry could be in the best possible position for significant progress in the new year.

With the Farm Bill delayed, potentially until after the upcoming Presidential Election, we can continue to build on the strong efforts made this year and have more time to ensure the final package contains key hemp industry priorities. Most importantly, we hope to see the FDA finally regulate CBD and see much-needed regulatory relief provided to farmers.

A critical signal of progress is that the most varied industry is united on a common Farm Bill mission. The Roundtable has joined 31 state, regional, and national organizations, representing every element of the hemp chain, and together they are urging Congress to uphold these objectives:

- Regulate CBD and other ingredients derived from hemp under the existing frameworks for dietary supplement and food additives as outlined in HR 1628, HR 1629 and S.2451;
- Reduce regulatory requirements for hemp grain and fiber farmers via HR 3755 and/or S. 980, or through a fit-for-purpose approach;

- Permit hemp grain for animal feed;
- Maintain the current definition of “hemp” while balancing appropriate consumer protections with continued market access to popular hemp products;
- Promote justice, equity and the planet by repealing the felon ban in HR 1428, supporting hemp research at minority serving institutions, and enhancing climate opportunities through carbon credit programs;
- End the DEA’s monopoly on registering hemp testing laboratories; and
- Mandate that hemp crops should be deemed compliant unless they exceed 1% total THC, as defined by USDA.

Another federal bill that may finally see passage this year is SAFE Banking, which would provide legal cannabis operators access to banking and financial services, including those in the hemp and CBD space. The House has passed the bill in some form seven times, only for it to be stalled by the Senate. In September, the SAFE(R) Banking Act (formerly SAFE Banking) passed out of the Senate Finance Committee by a bipartisan 14-9 vote, but has yet to go to the Senate floor for a vote. This marked the first time the Senate has taken action on the legislation. The pressure to secure passage before the election could work in the bill’s favor.

Across the states, we anticipate seeing more efforts to address adult use of hemp cannabinoid products, such as delta-8 THC. 2023 was a year of concern and promise – concern in that a growing number of states have been attempting to ban products that are potentially impairing and sweeping non-intoxicating full-spectrum hemp products into their prohibitions; promise in that courts have struck down some of the worst bans, and states like Kentucky are developing legal frameworks to regulate, not ban, these products. We hope legislatures will look to Kentucky’s model as the ideal means for regulating adult-use hemp products for their intoxicating nature and ensuring these products are kept out of the hands of children.

Looking ahead this year, the Farm Bill will be the hemp industry's biggest opportunity for federal policy change and we will likely see similar legislative trends in states, with a focus on delta-8 THC limits. The Roundtable remains steadfast in our advocacy efforts and commitment to promoting laws and policies that protect consumers and promote the industry.

Read more on the hemp and self-care industries calling for US FDA to [leverage existing authorities](#) to regulate legal cannabis ingredient use in food and dietary supplements.



George Paraskevacos

Executive Director

International Probiotics Association

... the 'Biotic Revolution.'

As the ever evolving terrain of probiotics, prebiotics, postbiotics, and synbiotics in the wellness industry has experienced significant progress and innovation, consumers expectations will continue to fuel the growth. Albeit

preferences for products that support gut health and overall well-being are top of mind, the upcoming years will see a surge in major markets for products with underlying scientific evidence of all products 'biotic'.

Propelled by a growing consumer awareness of the pivotal role these fundamental products play, not only in digestive health but in much broader aspects, the industry is at the brink of further expansion, with an increase in novel applications across very diverse sectors, encompassing food and beverages as well as dietary supplements.

IPA's challenges will be to make sure we not only help in defining a segment – that is, prebiotics, synbiotics, and postbiotics, around which confusion in the industry and the marketplace still persists – but also help lay the groundwork for proper frameworks needed outside of just definitions. If scientists cannot agree on a definition or appropriate use of terms, then how do governments proceed in regulating a category? Understanding mechanisms of actions of these segments and their products will be key in bringing the science into the conversation. Scientific understanding and their impact on individual microbiomes will be important in the context of supporting category definitions, frameworks and ultimately education.

Finally educating consumers, scientists, regulators, media, and health care professionals about the different types of biotics is vital. These key stakeholder groups are unique, and messaging will need to be targeted and segmented to the these very important stakeholder groups, as understanding of these categories represents a very different reality to the different stakeholders.

The International Probiotics Association (IPA) is committed to advancing the field of probiotics, prebiotics, postbiotics and synbiotics through a comprehensive approach that encompasses key differentiators – scientific integrity, global regulatory advocacy, support for quality standards development, fostering innovation, and finally promoting education and awareness. These are the core principles which drive our mission to advance the field of all 'biotics' to benefit consumers globally.

Read more about the IPA and its recent decision to [expand into representing new areas](#) of the growing microbiome-based wellness market.