

{LIVE WEBINAR}

Who Are Collagen Consumers and What Do We Know About Them?

Traci Kantowski
Collagen
Stewardship
Alliance & ITC

Maria Pavlidou
HMT Agency

#collagenconsumerinsights



About the Collagen Stewardship Alliance



MISSION

To promote the collagen category worldwide and steward responsible, sustainable growth

FOCUS AREAS

- Promote and attribute the science supporting collagen
- Promote product quality and appropriate testing
- Be an objective industry voice for collagen and collagen containing products, to consumers, government, retailers and practitioners
- Interact with trade and consumer media to promote greater awareness of collagen
- Work with academia and research organizations for clinical scientific projects
- Present data and insights on collagen ingredient, products and the category

**Let's
connect:**

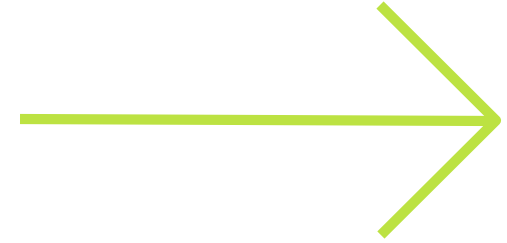
CollagenAlliance.org
Linkedin/collagenstewardshipalliance
#collagenstewardship #collageninfo

A large, stylized 'X' logo composed of two overlapping, curved, light beige shapes. The 'X' is centered on the left side of the page, with its arms extending towards the top and bottom edges.

HMIT

*The international specialist agency
for innovation, marketing and
branding in food & health*

HMT supports *change-makers*
in the nutrition industry

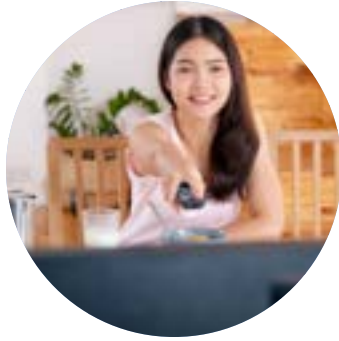


+ 15 years experience
+ 60 countries
+ 500 brands

History of working with game-changing brands



HOUSEKEEPING



ON DEMAND

This webinar is being recorded and will be available on demand with the slides. You will receive an email when it's available.



Q&A

Use the Q&A tab to submit questions. We'll do our best to answer them live.



CHAT

Please use the chat if you need assistance with any technical issues and our technical lead will assist you.

WHAT WE'LL COVER



- Collagen market overview
- The benefit areas resonating with consumers and what they're looking for in the market
- Which consumer profiles from HMT's FourFactors® Brand Acceleration System to help you identify the sweet spot for your organization
- Market case studies highlighting some of the latest innovations
- Q&A

POLL

What's your current involvement
in the collagen space?



COLLAGEN MARKET OVERVIEW



The global collagen market size was valued at \$9.1 billion in 2022 and is anticipated to expand at a compound annual growth rate (CAGR) of 10.2% from 2023 to 2030.

Grand View Research



Science is growing. In the last 10 years alone, over 98,000 studies related to collagen are listed on PubMed

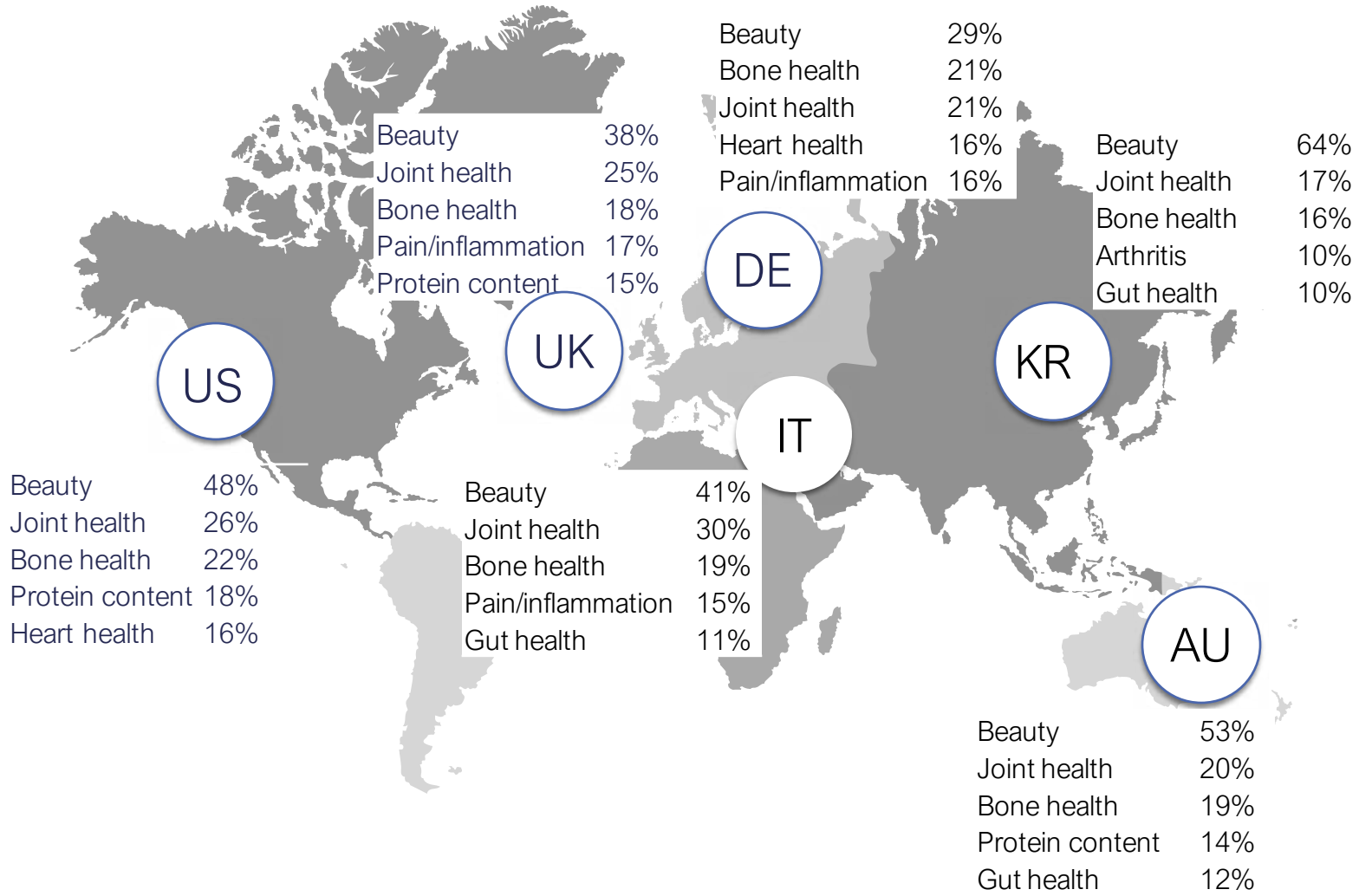
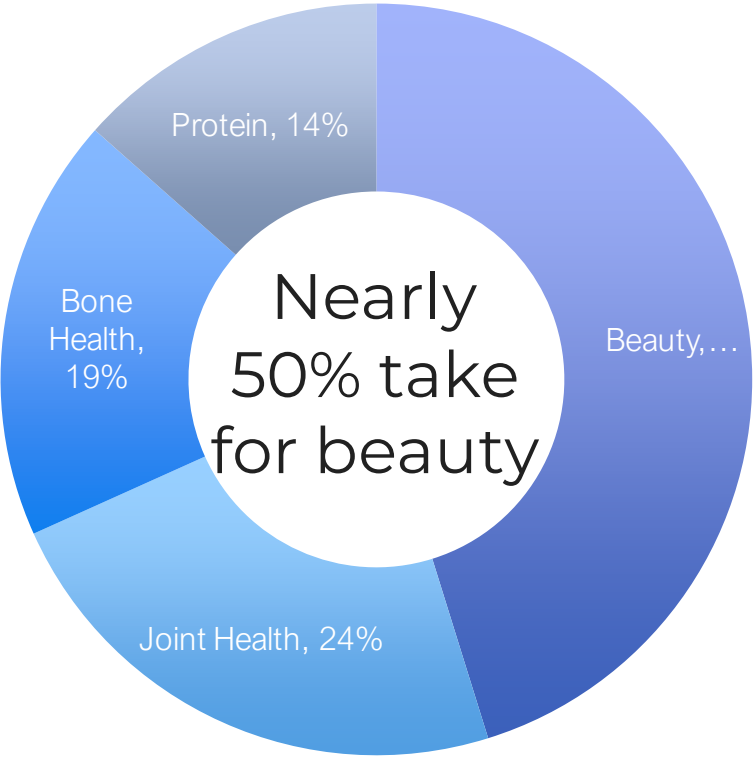
PubMed.gov search



Searches for collagen on Google are trending upward and are at their highest point for the last 5 years

Google Trends

WHY SUPPLEMENT CONSUMERS TAKE COLLAGEN

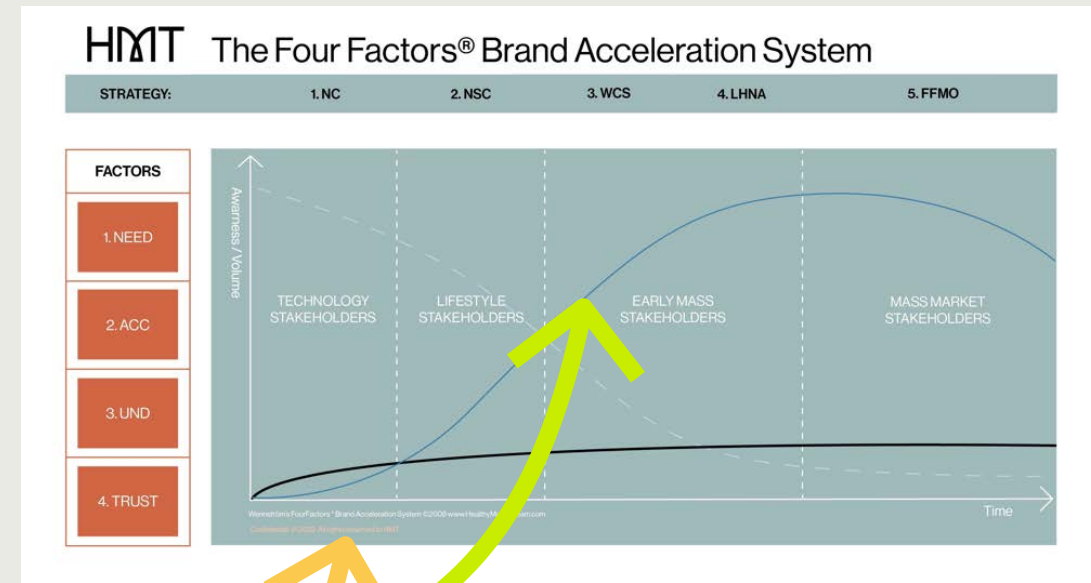


The leading strategic framework for innovation & brand positioning

FourFactors®

The FourFactors Brand Acceleration System is the leading strategic framework for consumer driven innovation and brand positioning - Connecting consumers with trends, categories and brands.

The framework is based on >15 years of analysis of success and failure factors, it is applied in >60 markets worldwide and proved to work across different countries and cultures. Validated through research from Maastricht University as the best model for food & health.





Introducing the model how
we segment consumers and
mapping the collagen
benefits.

3 distinct benefits with varying awareness levels



The “old” story:
Collagen for beauty



Category growth:
Collagen for active aging



The up and coming story:
Collagen as protein source



The Four Factors® Brand Acceleration System

STRATEGY:

1. NC

2. NSC

3. WCS

4. LHNA

5. FFMO

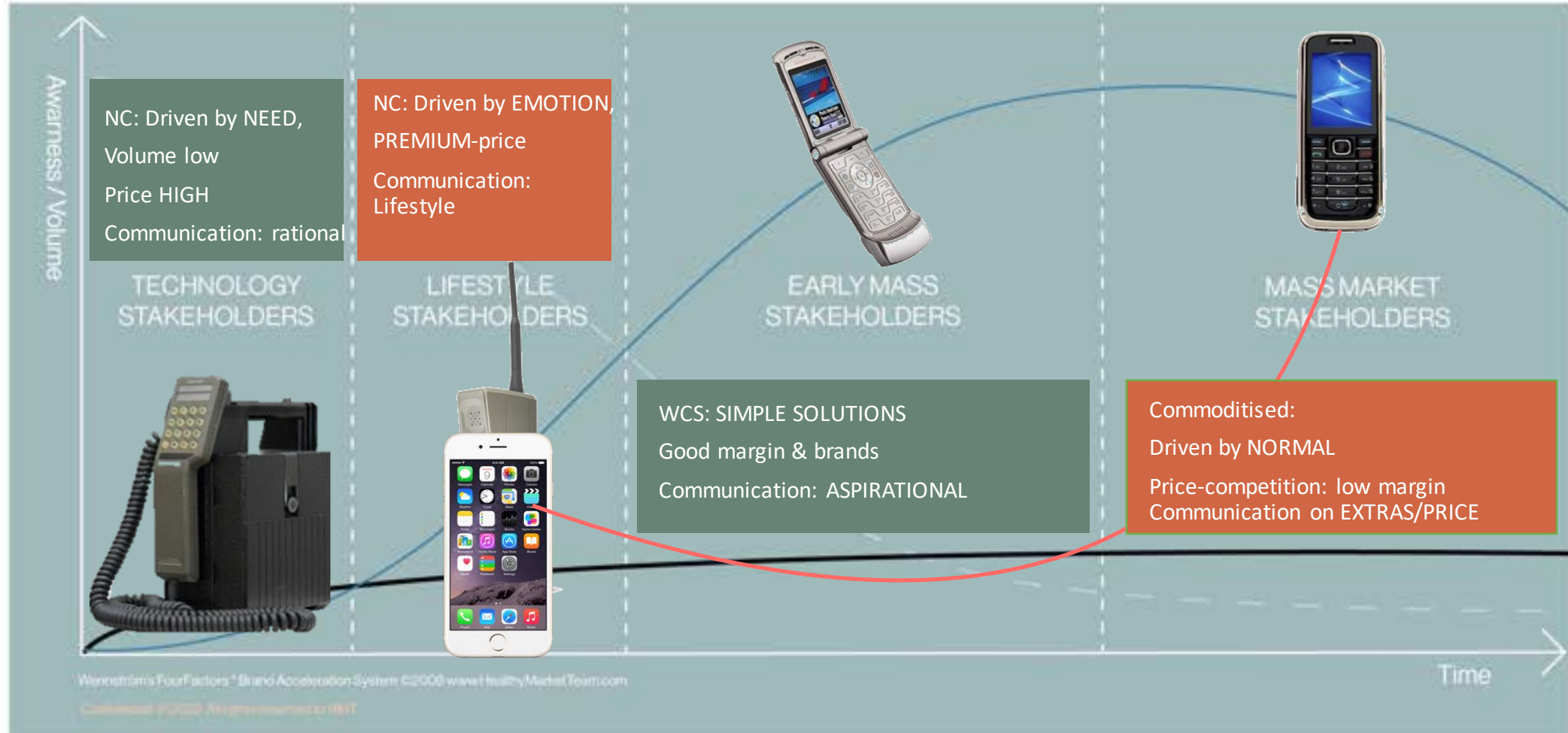
FACTORS

1. NEED

2. ACC

3. UND

4. TRUST





The Four Factors® Brand Acceleration System

STRATEGY:

MEDICAL NEED
My CONDITION
'I need to change'

WANT
My ATTITUDE
'I want to change'

SOLUTION
My SOLUTION
'I have to change'

NORMAL
My TRADITION
'I don't want/need to change'

FACTORS

1. NEED

2. ACC

3. UND

4. TRUST

Awareness / Volume



TECHNOLOGY
STAKEHOLDERS

DOES IT FIT MY
CONDITION ?
Is it proven?



LIFESTYLE
STAKEHOLDERS

DOES IT FIT "ME"?
Is it new / different?



EARLY MASS
STAKEHOLDERS

DOES IT FIT MY DAILY
ROUTINE?
Is it a solution to my needs?



MASS MARKET
STAKEHOLDERS

DOES IT FIT MY FAMILY
TRADITION?
Is it normal / for everybody?

Collagen for active aging

Collagen as protein source

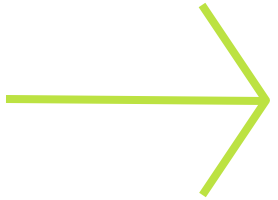
Collagen for beauty

Conclusion: the lifestyle consumers create a new lifestyle that will eventually create new habits and grow in the mass market.

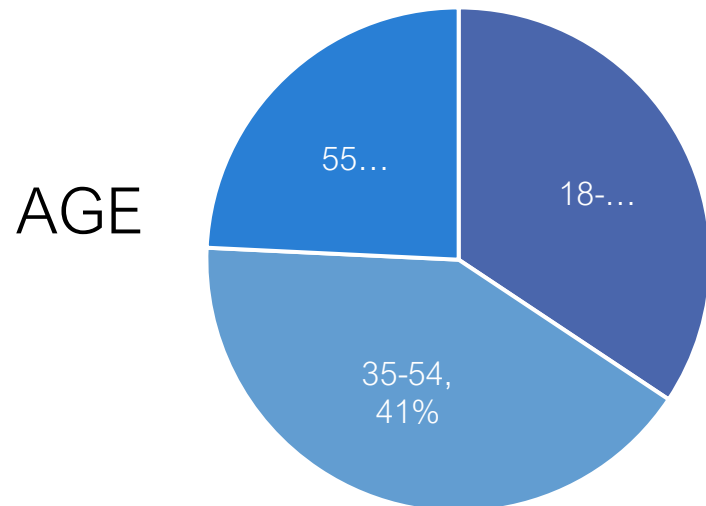
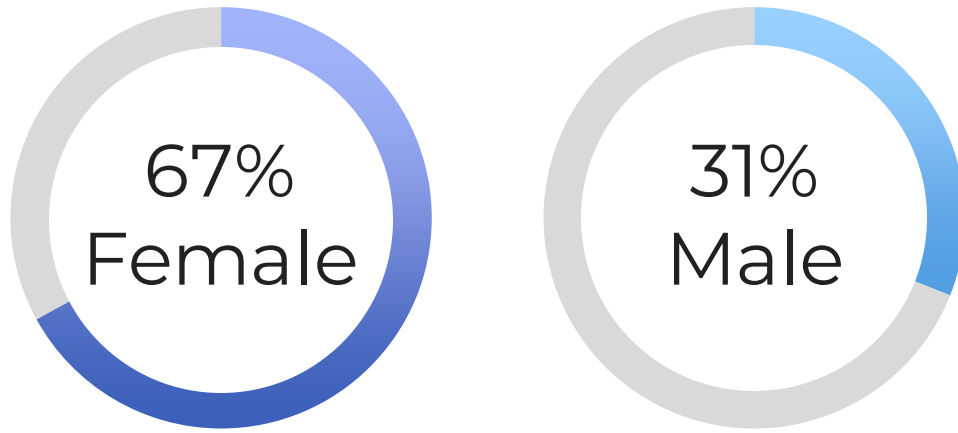
COLLAGEN FOR BEAUTY

Poll:

Where does your
company fit on
the spectrum for
collagen for
beauty?



Collagen Beauty Supplement Users



- 38% take collagen 4x/week or more
- 37% prefer to consume collagen in pill or capsule format and 33% in powder
- 27% said they prefer marine or vegetarian source
- They spend an average of \$18.85 on collagen supplements monthly
- 28% (+8% over all respondents) always look for branded ingredients and are willing to pay a premium



The Four Factors® Brand Acceleration System

STRATEGY:

1. NC

2. NSC

3. WCS

4. LHNA

5. FFMO

FACTORS

1. NEED

2. ACC

3. UND

4. TRUST



Collagen for beauty is a very established benefit area for collagen, but depending on how it is executed is can be positioned for different types of audiences.

Placeholder for “case study”
slides Japan and possibly South
Korea and then Australia

Beauty Personas

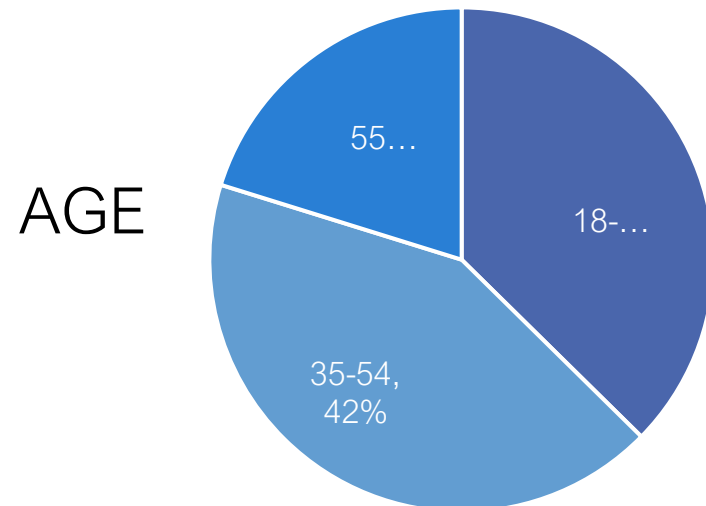
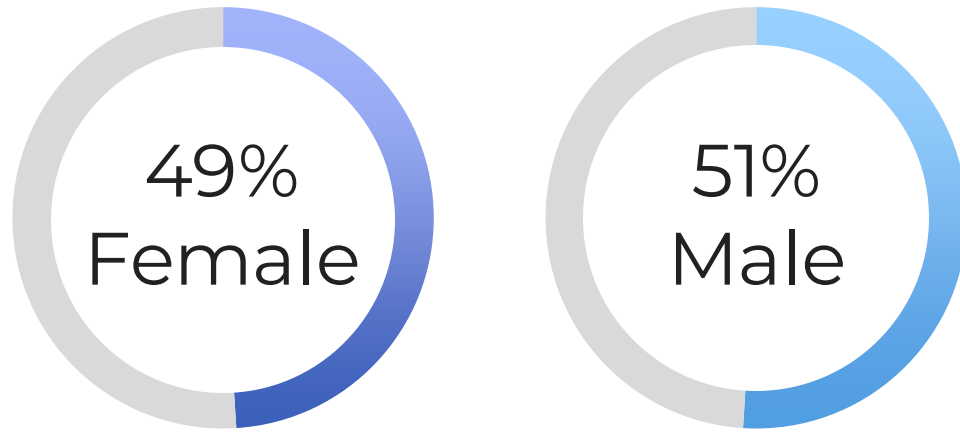
COLLAGEN FOR ACTIVE AGING

Poll:

→ Where does your
company fit on the
spectrum for
collagen for active
aging?



Collagen Active Aging Supplement Users



- 37% take collagen 4x/week or more
- 39% prefer to consume collagen in capsule format
- 31% said they prefer marine source
- Active aging collagen consumers spend an average of \$19.25 on collagen supplements
- 33% (+13% over all respondents) always look for branded ingredients and are willing to pay a premium

HMIT The Four Factors® Brand Acceleration System

STRATEGY:

1. NC

2. NSC

3. WCS

4. LHNA

FACTORS

1. NEED

2. ACC

3. UND

4. TRUST

Awareness / Volume

TECHNO
STAKEHO



Collagen for active aging can be boarderlining on medical or it can be playing in mass marketing. What is the space your brand occupies in the mind of the consumer?

Active Aging Personas

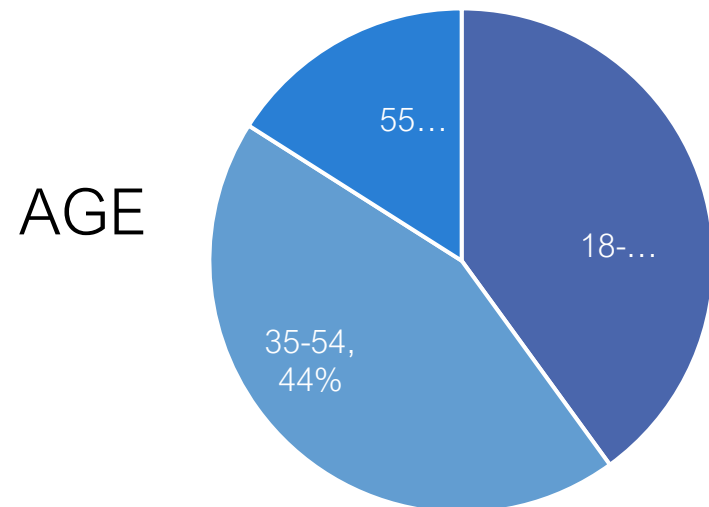
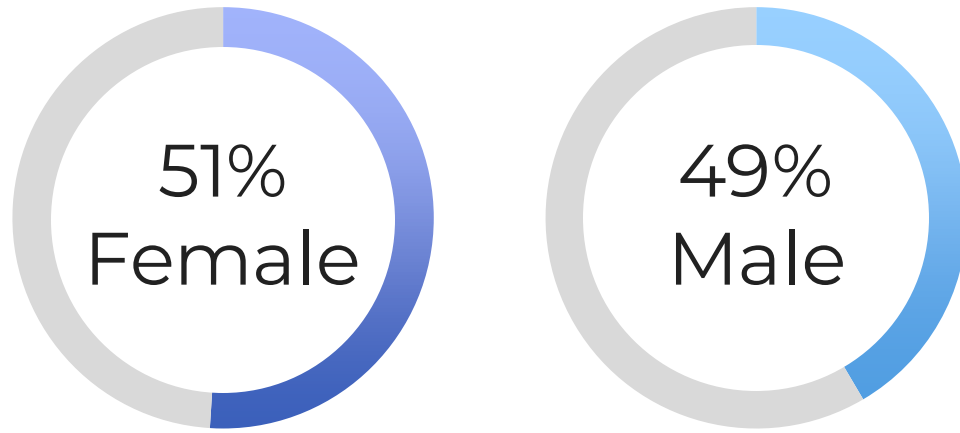
COLLAGEN FOR PROTEIN

Poll:

→ Where does your
company fit on
the spectrum for
collagen for
protein?



Collagen Protein Supplement Users



- 41% take collagen 4x/week or more
- 38% prefer to consume collagen in powder format
- 38% said they prefer marine source (this group did not place importance on vegetarian options)
- Protein collagen consumers spend an average of \$22.15 on collagen supplements monthly
- 34% (+14% over all respondents) always look for branded ingredients and are willing to pay a premium



The Four Factors® Brand Acceleration System

STRATEGY:

1. NC

2. NSC

3. WCS

4. LHNA

5. FFMO

FACTORS

1. NEED

2. ACC

3. UND

4. TRUST



Collagen as a source of protein is an up and coming benefit that is gaining awareness and we haven't seen it in mass market yet. It presents a growth opportunity.

Protein Personas

Different consumers, different needs

| • Technology stakeholder | • Lifestyle stakeholder | • Early mass stakeholder | • Late mass stakeholder |
|---|--|---|--|
| <p>Help my condition</p> <ul style="list-style-type: none"> • Medical need • Joint pain • Elite athletes • Active aging | <p>Positive change</p> <ul style="list-style-type: none"> • Lifestyle: Gym bros • Nutrition and beauty influencers | <p>Better for me</p> <ul style="list-style-type: none"> • The better option for me and my family • Taking care of myself • Sports enthusiast | <p>I only take what I know</p> <ul style="list-style-type: none"> • Beauty collagen and maybe joints • Low price and accessibility are key |
|  |  |  |  |

Opportunities

- Beauty, active aging and protein continue to be strong benefit area opportunities to focus on
- It's essential to select your target market and create a customized approach
- Pay attention to geography—there are differences across countries
- Fewer than half of collagen consumers are taking it regularly—big opportunity to convert these consumers



POLL

Which area do you think has the most opportunity for you?



Q&A



Traci Kantowski

Collagen Stewardship Alliance &
Industry Transparency Center
traci@itcstrategy.com

Maria Pavlidou

HMT
maria@theHMT.com