





20.01.2023

# Givaudan Survey

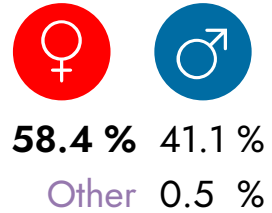
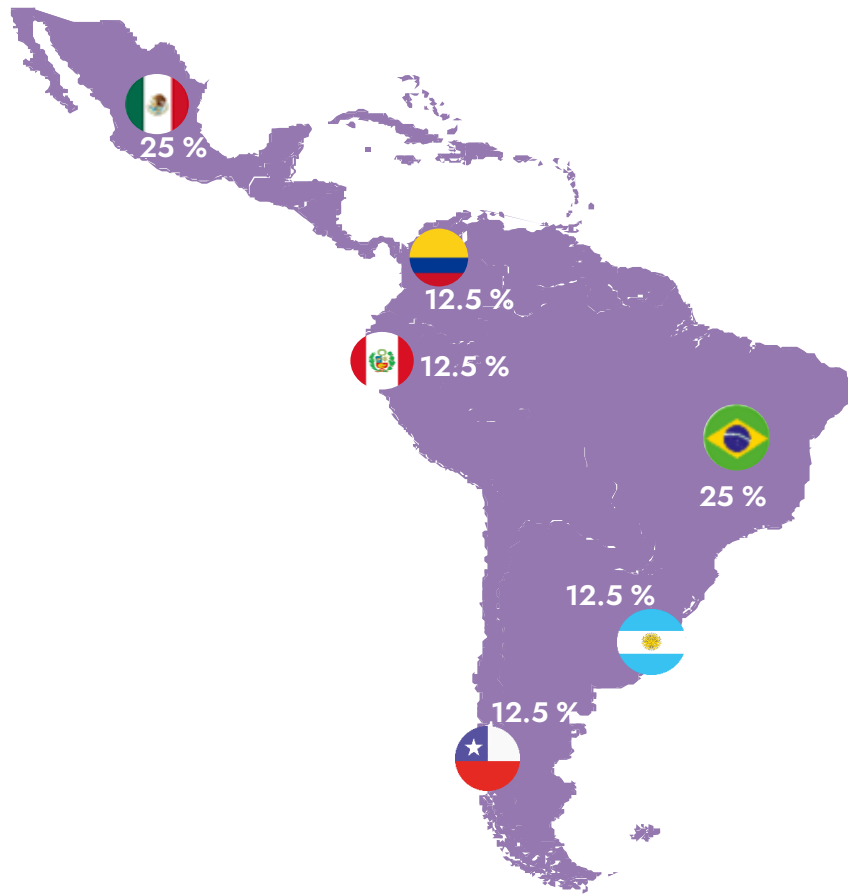
LATAM Supplement Consumers Sep-Oct 2023

Givaudan  
Human by nature

# General Survey Demographics

# General Survey Demographics

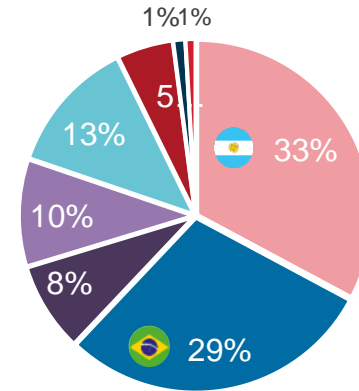
+2000 Supplements Consumers Survey



Gen Z 26 %  
**Millennials 51 %**  
 X Generation 18 %  
 Baby Boomers 5 %

**70%  
 Heavy Users**

## Frequency



- Daily once a day,
- Daily, several times a day
- Daily, two or three times a day
- Whenever I practice a sport
- 3-5 times per week
- Once or twice a week
- Once a month
- Twice a month

Givaudan Consumers Survey, 2145 LATAM Participants Sep-Oct 2023

# Consumption Reasons Vs Benefits Sought

Consumer Profile, Total Population

## Physical Energy Boosters

### Reasons

- Improve my physical health
- Greater physical performance
- Better nutrition

### Main Benefits

- Energy boost
- Performance during exercise
- Nutrition supplement

BB, X



### Moments

- When I need energy
- When I work out



Morning &  
Mid afternoon

## Beauty Seekers

### Reasons

- Improve my physical appearance

### Main Benefits

- Burnt calories
- Satiety
- Weight control
- Improve the quality of skin and/or hair
- Hydration

Y & Z



### Moments

- When I need energy
- When I'm hungry
- When I work out



Noon & Mid  
afternoon

## Eternals (Anti-ageing)

### Reasons

- Prevent premature aging

### Main Benefits

- Antioxidant
- Detox
- Strengthen bones & vision
- Improve the quality of skin and/or hair
- Hydration

BB, X, Y



### Moments

- When I need relax
- For Sleeping
- When I need to focus / concentrate



## Mental Health & Cognition

### Reasons

- Improve my mental health
- Have a more balanced life
- Prevent from diseases
- Improve my performance at work and/or in studies

### Main Benefits

- Relaxation
- Improve Sleep
- Concentration and/or mental focus
- Improve Cognitive level

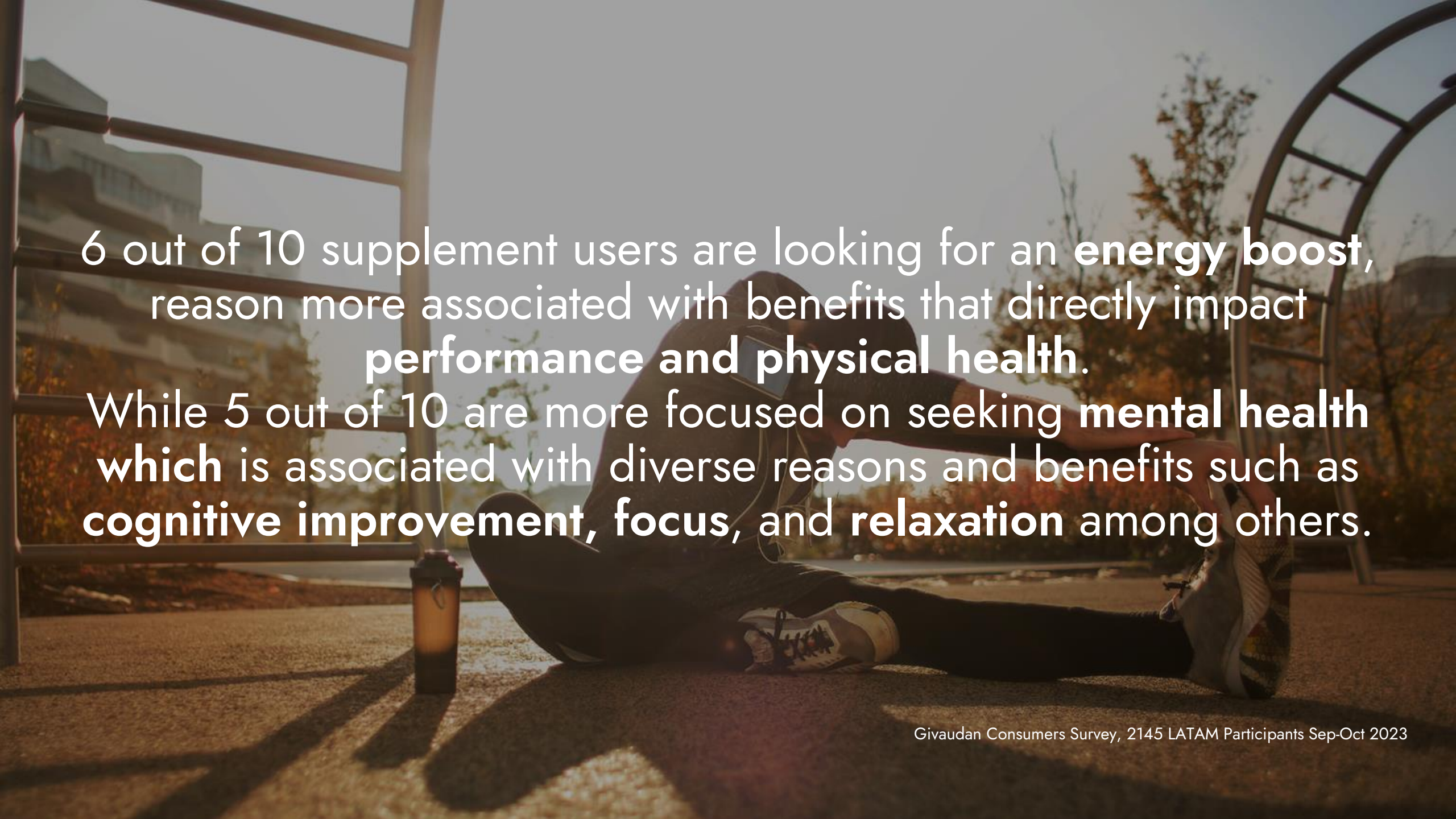


### Moments

- When I need to focus /concentrate
- To wake me up
- For Sleeping / Relax





A person in athletic wear is sitting on a park bench, looking at a smartphone. A water bottle is on the ground next to them. The background shows a park with trees and a building.

6 out of 10 supplement users are looking for an **energy boost**, reason more associated with benefits that directly impact **performance and physical health**.


While 5 out of 10 are more focused on seeking **mental health** which is associated with diverse reasons and benefits such as **cognitive improvement, focus, and relaxation** among others.


# Energy Vs Mental Health

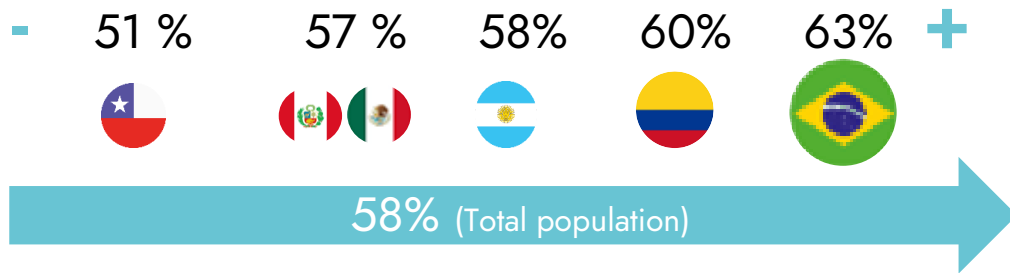
Consumer Behaviour LATAM Givaudan Survey

# Energy Boosters

Demographics, attitudes and behavior

**X Generation**  
**Baby Boomers** 

 **Energy** is the most sought-after benefit by Latin Americans.



Although energy is the most sought after benefit in Latin America, **Brazilians and Colombians** do it more.

## Top Reasons

- Energy boost
- Have greater physical performance
- Improve my physical health
- Have better nutrition

## Top Flavors

- Banana
- Cacao
- Cappuccino
- Chocolate
- Coffee



## Top Moments

- When I need Energy
- When I workout
- During the Breakfast



## Ingredients & Formats

- Guarana Liquid RTD
- Caffeine Powder
- Taurine Shots
- Açai Shakes





# Mental Health Meaning

## Top Benefits associated with Mental Health

- Improve Cognitive level
- Concentration & Mental Focus
- Relaxation
- Improve Sleep

40% of the total population and **60% of those seeking mental health are looking for a cognitive improvement** (mental abilities such as memory, attention, etc) .

Only 3 in 10 consumers are sure about the meaning of "nootropic ingredient", but 8 in 10 can define it intuitively if given options.



# Cognition Seekers

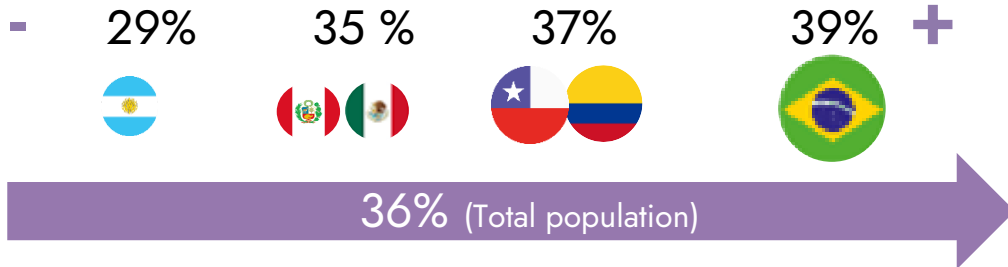
Demographics, attitudes and behavior



## Millennials



Cognition is the most sought after benefit around mental health.



Brazilians consume more supplements focused on cognition.

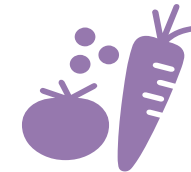
### Top Reasons

- Improve my cognitive level
- Energy Boost
- Nutritional supplement
- Concentration and/or mental focus



### Top Flavors

- Nuts
- Vegetables
- Dried fruits



### Top Moments

- When I need to focus/concentrate
- When I need Energy
- During the day, but not with food.

### Ingredients & Formats

- B Complex Capsules or Tablets
- Omega 3

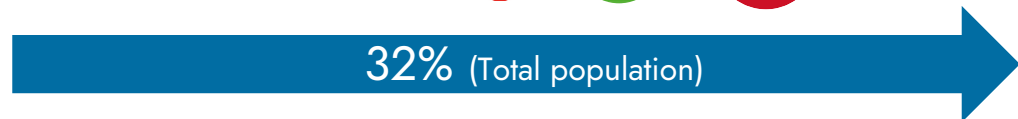


# Focus & Concentration

Demographics, attitudes and behavior



## Millennials



Colombia is the country where the most consumers look for supplements with the benefit of focus and concentration.

## Top Reasons

- Concentration and/or mental focus
- Energy Boost
- Improve my cognitive level
- Nutritional supplement



## Top Moments

- When I need to focus/concentrate
- When I need Energy
- During the day, but not with food.

## Top Flavors

- Dried fruits
- Grapefruit
- Nuts
- Vegetables



## Ingredients & Formats

- Black tea Hot Infusion
- Green Coffee Capsules or Tablets
- Green tea Liquid RTD, Powder, Shake
- Mate
- B Complex
- Omega 3
- Caffeine
- Guarana





# Sleep Improvement Vs Relaxation

The search for **better sleep** is significantly greater than that for relaxation.

**62%** of those looking for **relaxation** are looking for **improve sleep**.

But only **38%** of those seeking to **improve sleep** also seek to relaxation.

# Improve Sleep

Demographics, attitudes and behavior



**X Generation  
Baby Boomers**



**Improve Sleep 31%** (Total population)

**Colombia** is the country where the most consumers look for supplements with the benefit of Improve Sleep



## Top Reasons

- Improve my physical & mental health
- Have better nutrition
- Have greater physical performance
- Prevent from diseases
- Have a more balanced life

## Top Moments

- For sleeping
- When I need to relax
- When I need to focus/concentrate
- Starting at mid-afternoon.



## Top Flavors

- Cinnamon
- Herbal
- Mint or Spearmint
- Vanilla
- Flowers

## Ingredients & Formats

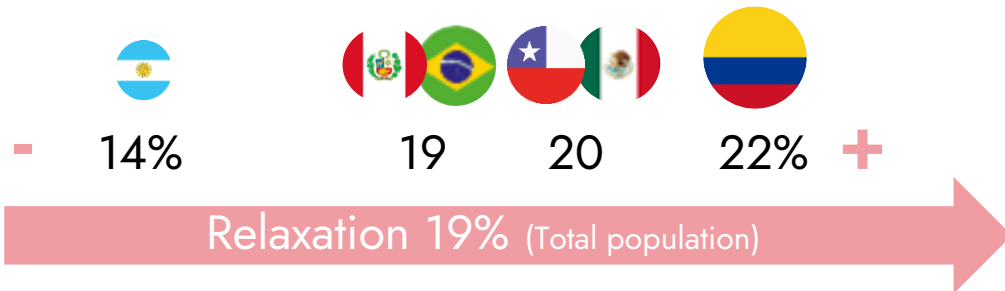
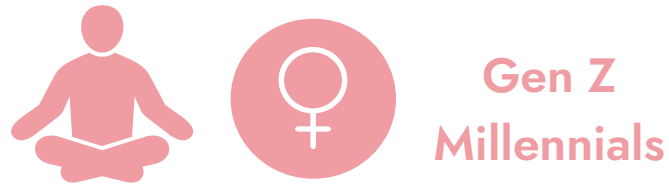
- |              |              |
|--------------|--------------|
| • Melatonin  | Capsules or  |
| • Chamomile  | Tablets,     |
| • Lavander   | Gummies or   |
| • Valerian   | Candies      |
| • Melissa    | Hot Infusion |
| • Passiflora | Both         |



Givaudan Consumers Survey, 2145 LATAM Participants Sep-Oct 2023

# Relaxation

Demographics, attitudes and behavior



Mexico is the country where the most consumers look for supplements with the benefit of Relaxation

## Top Reasons

- Improve my physical & mental health
- Have better nutrition
- Improve sleep
- Digestion
- Improve my cognitive level, concentration and/or mental focus

## Top Flavors

- Cinnamon
- Herbal
- Mint or Spearmint
- Flowers



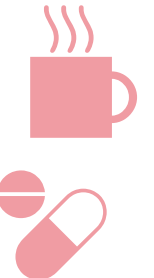
## Top Moments

- When I need to relax
- When I need to focus/concentrate
- For sleeping
- Mid-afternoon - Night



## Ingredients & Formats

- |              |                     |
|--------------|---------------------|
| • Chamomile  | Hot Infusion        |
| • Lavander   | Both                |
| • Valerian   | Capsules or Tablets |
| • Melissa    |                     |
| • Passiflora |                     |

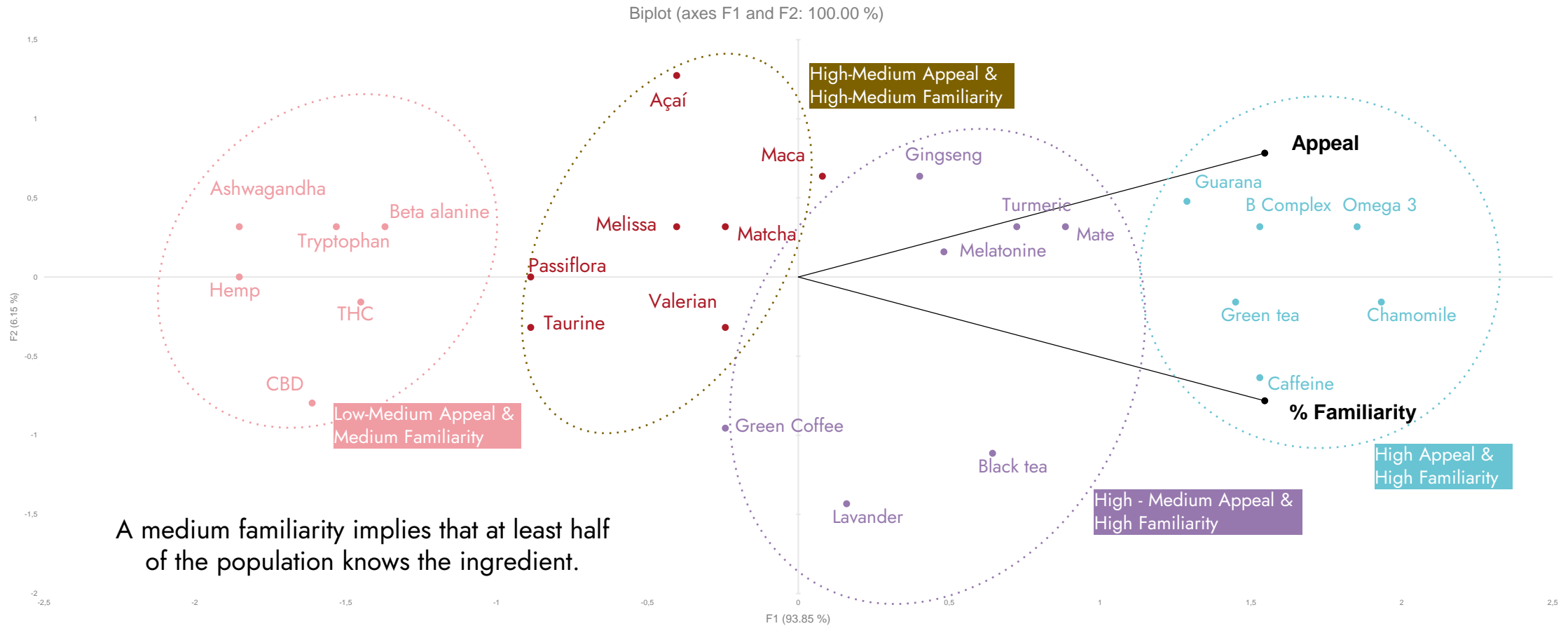


Givaudan Consumers Survey, 2145 LATAM Participants Sep-Oct 2023



# Appeal & Ingredients Knowledge (Familiarity)

Total population LATAM



# Ingredients functionality association

Total population LATAM



I am not sure...	Focus / Concentration	Stress Relief	Improve Sleep	Cognition	Relaxation	Energy	
Ashwagandha	<b>B Complex</b>	<b>Chamomile</b>	Melatonin	<b>B Complex</b>	<b>Chamomile</b>	Beta alanine	<b>Caffeine</b>
CBD	<b>Omega 3</b>	<b>Lavender</b>	<b>Chamomile</b>	<b>Omega 3</b>	<b>Lavender</b>	Maca	<b>Guarana</b>
Hemp	<b>Caffeine</b>	<b>Black tea</b>	<b>Lavender</b>		<b>Melissa</b>	Matcha	Açaí
THC	<b>Guarana</b>	<b>Gingseng</b>	<b>Melissa</b>		<b>Passiflora</b>		Taurine
Tryptophan		<b>Green Coffee</b>	<b>Passiflora</b>		<b>Valerian</b>		<b>Black tea</b>
		<b>Green tea</b>	<b>Valerian</b>				<b>Gingseng</b>
		<b>Mate</b>					<b>Green Coffee</b>
		<b>Turmeric</b>					<b>Green tea</b>
		<b>Melissa</b>					<b>Mate</b>
		<b>Passiflora</b>					<b>Turmeric</b>
		<b>Valerian</b>					

For stress relief, people use relaxing supplements but also another associated with energy contribution.

N=2145, **Ingredients in bold** are associated with more than one functionality.

Givaudan Consumers Survey, 2145 LATAM Participants Sep-Oct 2023

# Ingredients formats association

Total population - LATAM



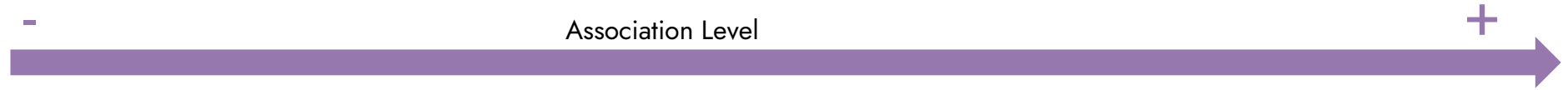
I am not sure...	Gel	Gummies or Candies	Shots	Shakes	Liquid RTD	Powder	Capsules or Tablets	Tea (Hot Infusion)
Ashwagandha	<b>Lavander</b>	<b>B Complex</b>	<b>Caffeine</b>	<b>Caffeine</b>	<b>Caffeine</b>	Turmeric	<b>B Complex</b>	<b>Black tea</b>
Beta alanine	<b>Valerian</b>	<b>Melatonin</b>	<b>Guarana</b>	<b>Guarana</b>	<b>Guarana</b>	<b>Caffeine</b>	<b>Melatonin</b>	<b>Chamomile</b>
CBD	<b>B Complex</b>	<b>Omega 3</b>		<b>Açaí</b>	<b>Green Coffee</b>	<b>Guarana</b>	<b>Omega 3</b>	<b>Green Coffee</b>
Hemp	<b>Melatonin</b>			<b>Gingseng</b>	<b>Mate</b>	<b>Green Coffee</b>	<b>Açaí</b>	<b>Mate</b>
THC	<b>Omega 3</b>			<b>Maca</b>	<b>Black tea</b>	<b>Mate</b>	<b>Gingseng</b>	Green tea
Tryptophan				<b>Taurine</b>	<b>Chamomile</b>	<b>Açaí</b>	<b>Maca</b>	Matcha
					<b>Açaí</b>	<b>Gingseng</b>	<b>Taurine</b>	Melissa
					<b>Gingseng</b>	<b>Maca</b>		Passiflora
					<b>Maca</b>	<b>Taurine</b>		<b>Lavander</b>
					<b>Taurine</b>			<b>Valerian</b>

N=2145, Ingredients in bold are associated with more than one functionality. Bars and Dairy or Yogurt with low associations.



# Flavors functionality association

Total population - LATAM



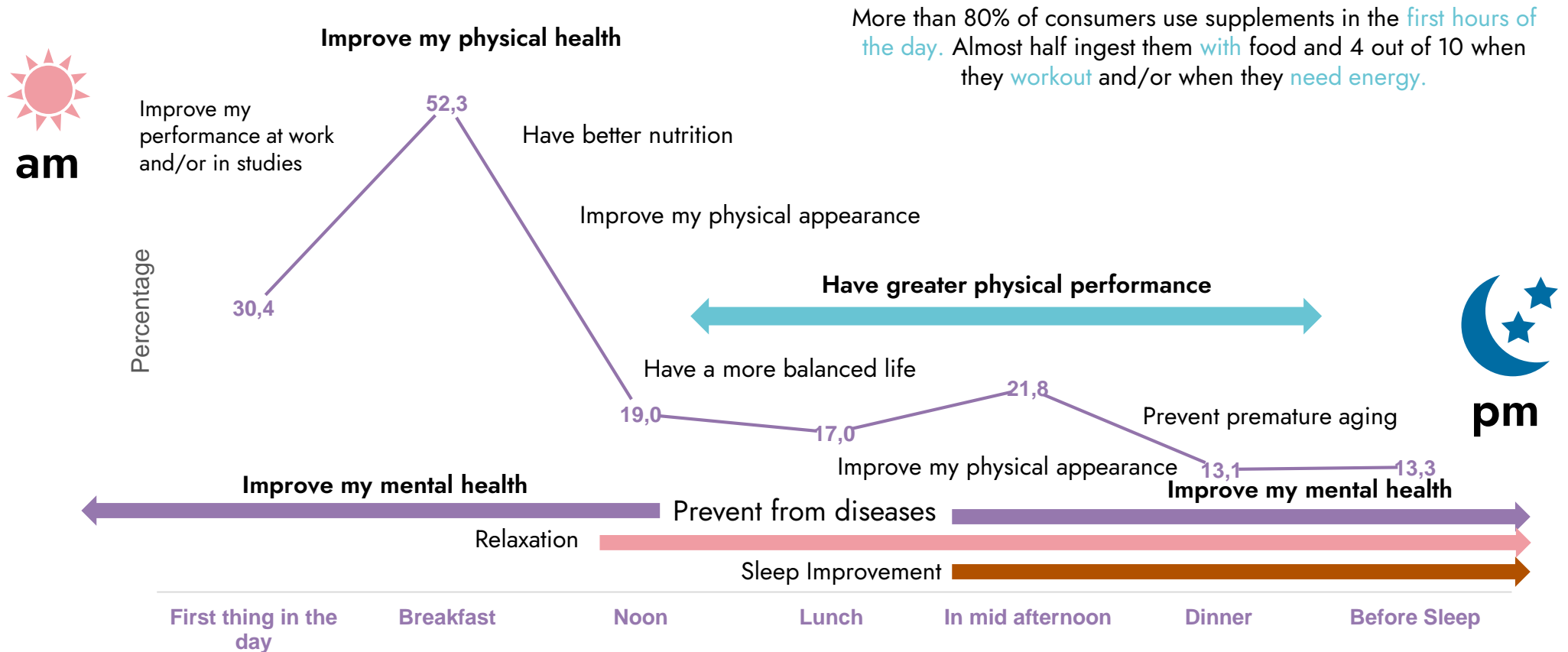
I am not sure...	Focus / Concentration	Stress Relief	Improve Sleep	Cognition	Relaxation	Energy	
Horchata Lulo Chai Matcha Without flavor	Dried fruits Nuts Vegetables Apple Blackberries Grape Passionfruit Peach Raspberry Strawberry Watermelon	Flowers Cinnamon Herbal Mint or Spearmint Vanilla	Cinnamon Herbal Mint or Spearmint Vanilla Flowers	Dried fruits Nuts Vegetables	Flowers Cinnamon Herbal Mint or Spearmint Vanilla	Apple Blackberries Grape Passionfruit Peach Raspberry Strawberry Watermelon Cherry Coconut Cucumber Hibiscus Spicy	Banana Cacao Cappuccino Chocolate Coffee Cranberry Kiwi Lime - Lemon Mandarin Mango Pineapple Tropical fruits Dried fruits Nuts Vegetables Citrus Guava Mix de Berries Napolitan

Most of the flavors evaluated are associated at different levels with energy

N=2145, Flavors in bold are associated with more than one functionality.

# When do consumers take supplements?

## Reasons and Consumption Schedules



# Conclusions

The majority of supplement consumers **in Latin America** seek the benefit of **energy and focus** this on results that are directly reflected in physical functions. They tend to be more male and older generations (Late Millennials, Generation X, and Baby Boomers).

The country with the highest percentage is Brazil. Consumption takes place mainly during **the morning or between noon and afternoon**. This benefit presents clearer ingredient associations with more specific formats and many flavoring options. The most representative ingredients are **Guarana and Caffeine**.





**Mental health** is represented in a more holistic way for various reasons and benefits that are mainly related to **cognition, focus, improved sleep** and relaxation. The benefits of cognitive improvement and relaxation are more sought after by women. While for focus and sleep improvement there is no difference by gender.

Most of these benefits are more sought after by younger generations (Millennials and Gen Z), except for improved sleep, which is more sought after by older people (Generation X and Baby Boomers).

**Colombia** is the one with the highest percentages for most benefits, except for cognition where the highest percentage is Brazil. Consumption times depending on the benefit sought are consumed early in the day or at night.



From the group of benefits related to mental health, the most sought after is **cognition**, although not all consumers know the meaning of the term nootropic, of those who consume only 3 out of 10 are sure of the meaning but 8 out of 10 handle it intuitively. And there are only a few ingredients that are related to this function, **Omega 3 and B Complex**. The focus benefit is the one with a lower level of association, although with more associated ingredients than cognition and with a greater possibility of associated flavors.





The least sought after benefit **is relaxation**, even short of improved sleep. Both have the same group of ingredients associated with them (Chamomile, Lavander, Valerian, Melissa, Passiflora) except for melatonin, which is only associated with **improving sleep**. For both benefits there are various format options but few flavor options.



**Follow us on social media @givaudan**



**Givaudan**  
Human by nature