



Bruges, Belgium, 11/19/2021

Food Supplement as a New Luxury

BEAUTY CONSUMPTION
INSIDE, OUT!



The Self-care Renaissance 2021

Convergence of Wellness and Health-care

A new era in healthcare has begun 300 years after the previous Medical Renaissance (1400-1700). Wellness is gaining the ability to rely on science, set standards, and hold itself accountable. At the same time, healthcare is beginning to take a page from the wellness playbook, converting a business that was previously sterile and solely curative into one that is more qualitative, lifestyle-oriented, and even joyful.

Hedonism, epurianism and new philosophies...

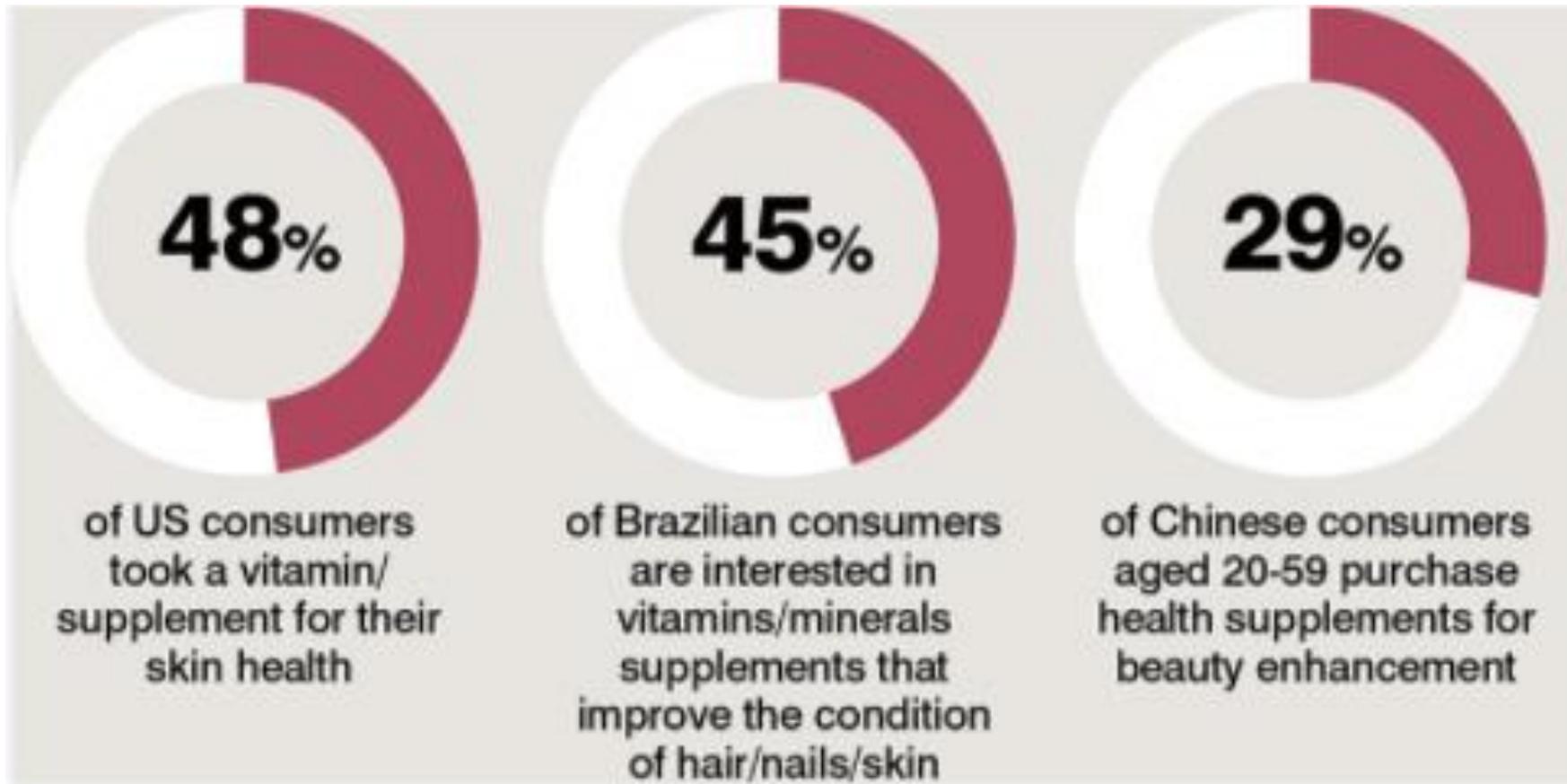


According to the Global Wellness Institute Research

\$4.5 trillion Market

The worldwide wellness market is estimated to be worth more than \$4.5 trillion, with annual growth of 6.5 to 10%.





Shoppers spend more money on Food supplements rather than Skincare.

Changes in retail distribution design... OTC as an issue ?

Could we be predicting some societal shifts like those which have been impacting on the esthetic surgery sector in the past, whether in India, GCC or LATAM ?

The Europe dietary supplements market size was valued at \$14.95 Bn in 2020 & is projected to reach \$33.80 Bn by 2027, at a CAGR of 9.3% in the forecast period.

Ethnomarkets and the Creto régime...

Europe Dietary Supplement Market: Market Share (%), by Country 2020



Regulatory Framework

Regulatory Framework Food Supplements



By comparing Europe, the US and Japan, it can be considered that the regulatory framework of food supplements exhibit significant differences. Consequently, the manufacturing, selling and marketing of food supplements is variously regulated and has different constraints.

The CVS effect ?

Certificate of Suitability CEP

Europe

The legislation is based on harmonized lists of vitamins and minerals that may be used in the manufacture of food supplements. If non-listed sources of nutrients are to be used, an application to the European Commission is required, after which EFSA issues a scientific opinion.

US

It does not require agency approval or FDA assurance prior to manufacturing, selling and marketing the products. Nevertheless, there is a requirement under federal law that clear labelling of dietary supplements be carried out as such. After market introduction, FDA monitors and controls activities.

Japan

In Japan, dietary supplements are more considered as **health food/food with health claims**, divided into different categories with different legal bases. While e.g. FOSHU** is subject to a complex approval process and rigorous regulations, FNFC is subject to a simplified approval process and lighter regulations.

A new **contestable** market ...

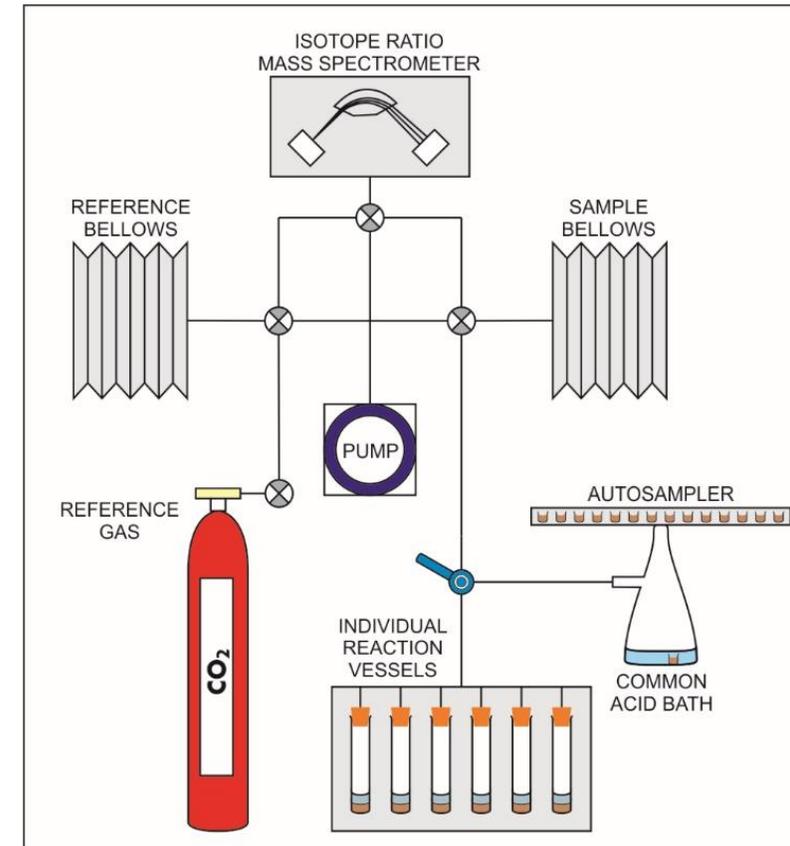
We should be reading **William Baumol** one more time !!!

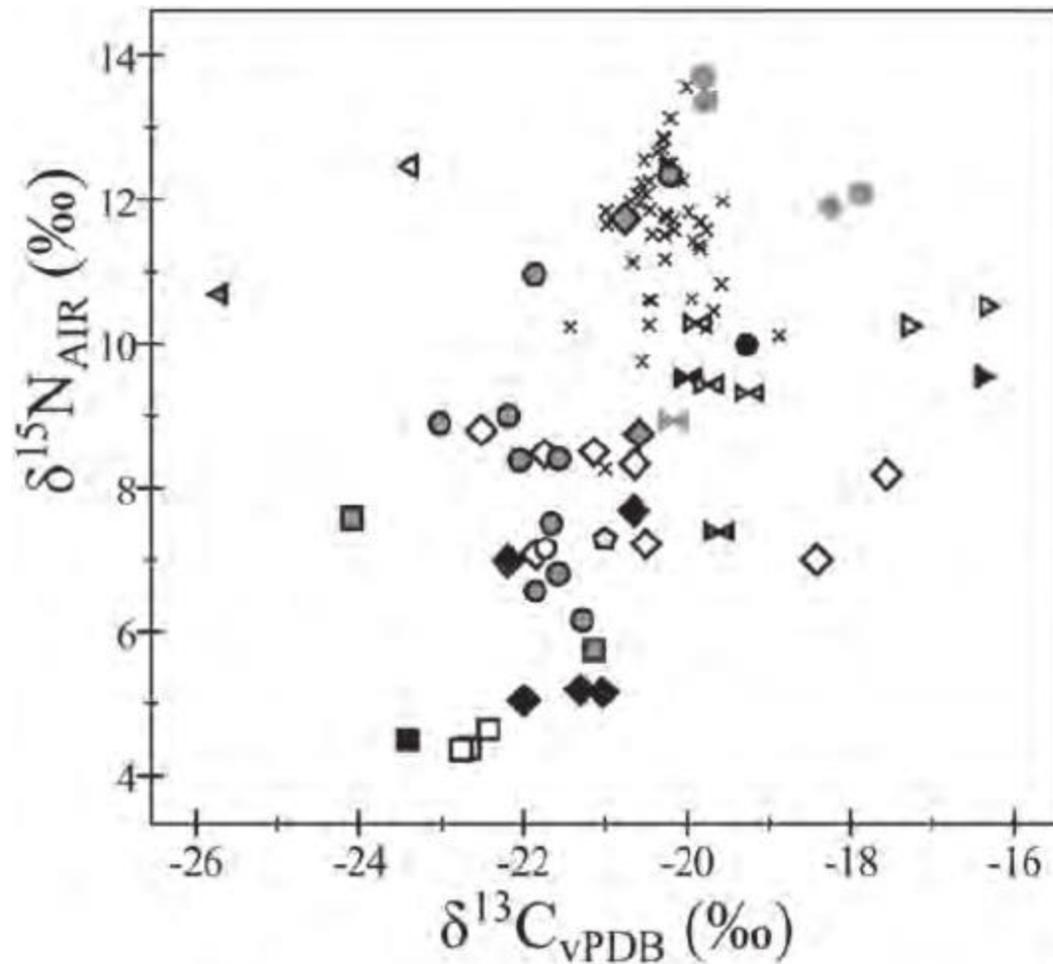
Remember the old ages with the **GRAS** status, and then the REACH typology ?

From natural to organic...

*From the mine to Lab
Grown Diamonds*

Stable Isotope Ratio Analysis (SIRA) testing **uses isotopes of certain elements that are naturally occurring**. An isotope is an atom of the same chemical element that has the same number of protons but a different number of neutrons in their nuclei. ... For SIRA we only use stable (i.e. non-radioactive) isotopes.





× *Homo sapiens* (Human)

Herbivores

■ *Capreolus capreolus* (Roe Deer)

□ *Cervus elaphus* (Red Deer)

▣ *Lepus Europaeus* (European Hare)

◇ *Bos taurus* (Cow)

◆ *Equus caballus* (Horse)

◊ *Ovis aries* (Sheep)

Omnivores

● *Canis familiaris* (Dog)

○ *Cricetus cricetus* (European Hamster)

◐ *Sus scrofa* (Pig)

● *Vulpes vulpes* (Red Fox)

Avifauna

✂ *Buteo buteo* (Common Buzzard)

✂ *Corvus monedula* (European Jackdaw)

✂ *G. stratopelia* (Dove)

✂ *Lyrurus tetrix* (Black Grouse)

Anadromous Fish

▷ *Acipenser* sp. (Sturgeon)

▷ *Salmo salar* (Salmon)

Freshwater Fish

◁ *Sander lucioperca* (Zander)

◁ *Silurus glanis* (Wels Catfish)

Amphibian

◊ *Bufo bufo* (Common Toad)

Next step ? Which clues, claims, tests ?

Metabolism or catabolism ? In vivo, in vitro... what else ? Red Bull's eyes with the taurine or créatinine syndroms which have been 2.0

The quest for a better life is not only scientific and logical, but also psychological....

Why do we so much focus on risks ? **Too many rules and changes can kill innovation as our chairman said yesterday...**

The financial bareer is keeping on growing in our countries... Novelfood and followers... We already had this case with the pharmaceutical companies (remember the lacks during the early steps for the covid ?), the food and fragrance industry, the IOFI and other desperate lobbies...

The **fugu** (河豚; 鰐; フグ) in [Japanese](#), **bogeo** (복어; 鰐魚) or **bok** (복) in [Korean](#), and **hétún** (河豚; 河鲀) in [Standard Modern Chinese](#)^[1] is a [pufferfish](#), normally of the genus [Takifugu](#), [Lagocephalus](#), or [Sphoeroides](#), or a [porcupinefish](#) of the genus [Diodon](#), or a dish prepared from these fish.

Fugu can be **lethally poisonous** to humans due to its [tetrodotoxin](#), meaning it must be carefully prepared to remove toxic parts and to avoid contaminating the meat.^[2]

The restaurant preparation of fugu is strictly controlled by law in [Japan](#) and several other countries, and only chefs who have qualified after three or more years of rigorous training are allowed to prepare the fish.^{[2][3]} Domestic preparation occasionally leads to accidental death.^[3]

Fugu is served as [sashimi](#) and [chirinabe](#).^[3] The liver was served as a traditional dish named *fugu-kimo*, being widely thought to be a tasty part, but it is also the most poisonous, and serving this organ in restaurants was banned in Japan in 1984.^[3] Fugu has become one of the most celebrated dishes in [Japanese cuisine](#).

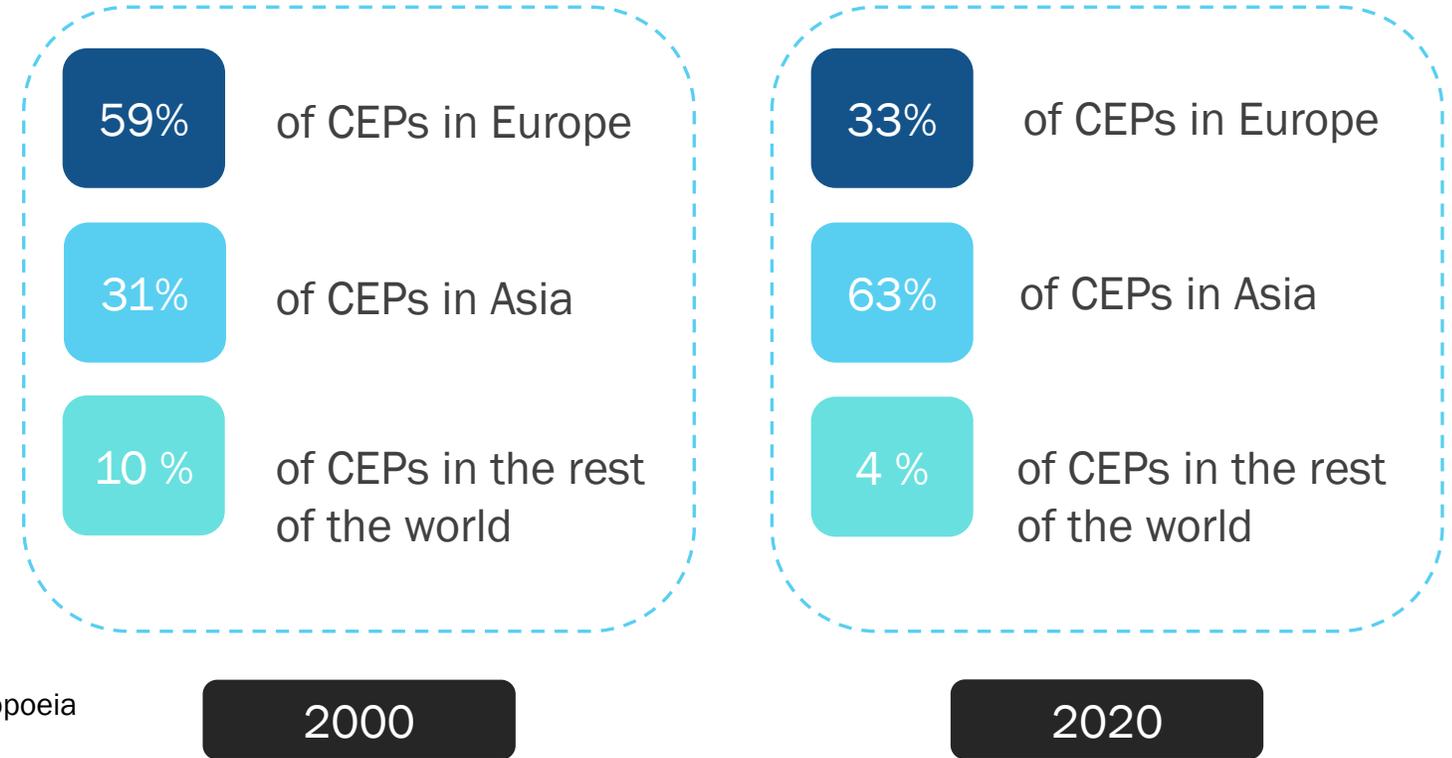
Shifting from market driven to
market driving strategies ...

From Gauss to Poisson ... New
statistics and AI...

CEPs Development

Regulatory Framework APIs
Pharma/Drug Industry

Percentage of CEPs for active pharmaceutical ingredients quality, used for drug approval, comparing Europe, Asia, and the rest of the world.



*CEP: Certificate of Suitability of Monographs of the European Pharmacopoeia
Source: Mundi Care & Progenerika, 2020
https://progenerika.de/app/uploads/2020/11/API-Study_short-version_EN.pdf



Remarkable strong shift from Europe towards Asia in the time frame from 2000-2020. Reasons can be found in the two components: Disparate regulatory standards & cost pressure

Less regulatory issues, more market shares... That's the worst when a contestable market is coming up.... And blooming

The Consumer Trends

Today's consumers are the generation of internet self-educators; their beauty knowledge is expanding, and they recognize that the substances in their skincare will be more effective if they include them into their diet and routine.

Self Medication, self customization and the way to bespoke offers



The state of one's skin is often a mirror of one's overall health.

The Label Readers

While many customers have been promoting clean eating, the need for natural and herbal items is expected to grow in 2021 as the taste for ingredients turns away from synthetic and chemical elements and toward natural ingredients. Food companies are putting a lot of effort into their labels to make sure the ingredients are clear and clean so that the typical consumer knows exactly what they're eating.

**BRINGING THE RIGHT
INGREDIENTS TO YOUR DIET.**



Your vitamin routine should reflect who you are – but also who you want to be!

THE MINDSET 2.0

Putting down to work-related stress, pollution exposure, the convenience of fast food, or hectic schedules that prevent sleep and exercise. Therefore, the supplements come to the rescue!

Consumers don't want to be fixed; instead, they want to be motivated to become a better version of themselves.

Its aspiration wrapped up in a charming packaging.

From “doping” to treatments... ?



[le modèle de diffusion en avalanches spatiales - jstor](https://www.jstor.org/stable)

[https://www.jstor.org › stable](https://www.jstor.org/stable)

by A Steyer · 2005 · Cited by 16 — 20, n° 3/2005. Géométrie de l'interaction sociale : le modèle de diffusion en avalanches spatiales. Alexandre Steyer

The **mimetic theory of desire** is an explanation of human behavior and culture which originated with the French historian and polymath René Girard. ... “Man is the creature who does not know what to desire, and he turns to others in order to make up his mind. We desire what others desire because we imitate their desires.”

Giving birth to models endorsers and influencers who have nothing to do with rules !

Role models as defined and analyzed by the IOA in Olympia



Réuni en mode virtuel, le congrès de World Athletics n'a pas vraiment hésité avant de décider de conserver la Russie à la porte de la salle. Selon le rapport de l'instance, 126 fédérations nationales ont voté pour la prolongation de la suspension de la RusAF, imposée depuis le mois de novembre 2015. Seulement 18 s'y sont opposées. Elles ont été 34 à ne pas se prononcer.

Précision importante : le vote du congrès s'est tenu au terme d'une présentation des deux parties concernées. Les votants ont donc écouté les uns et les autres, Rune Andersen, le patron de la *task force* de World Athletics sur la Russie, et Irina Privalova, la championne olympique du 400 m haies en 2000, présidente en exercice de la RusAF. 17/11/2021



Consumer Definition of Wellness Today!

Better Health & wellness

Better Nutrition

Better appearance

Better sleep

Better mindfulness

Better Fitness

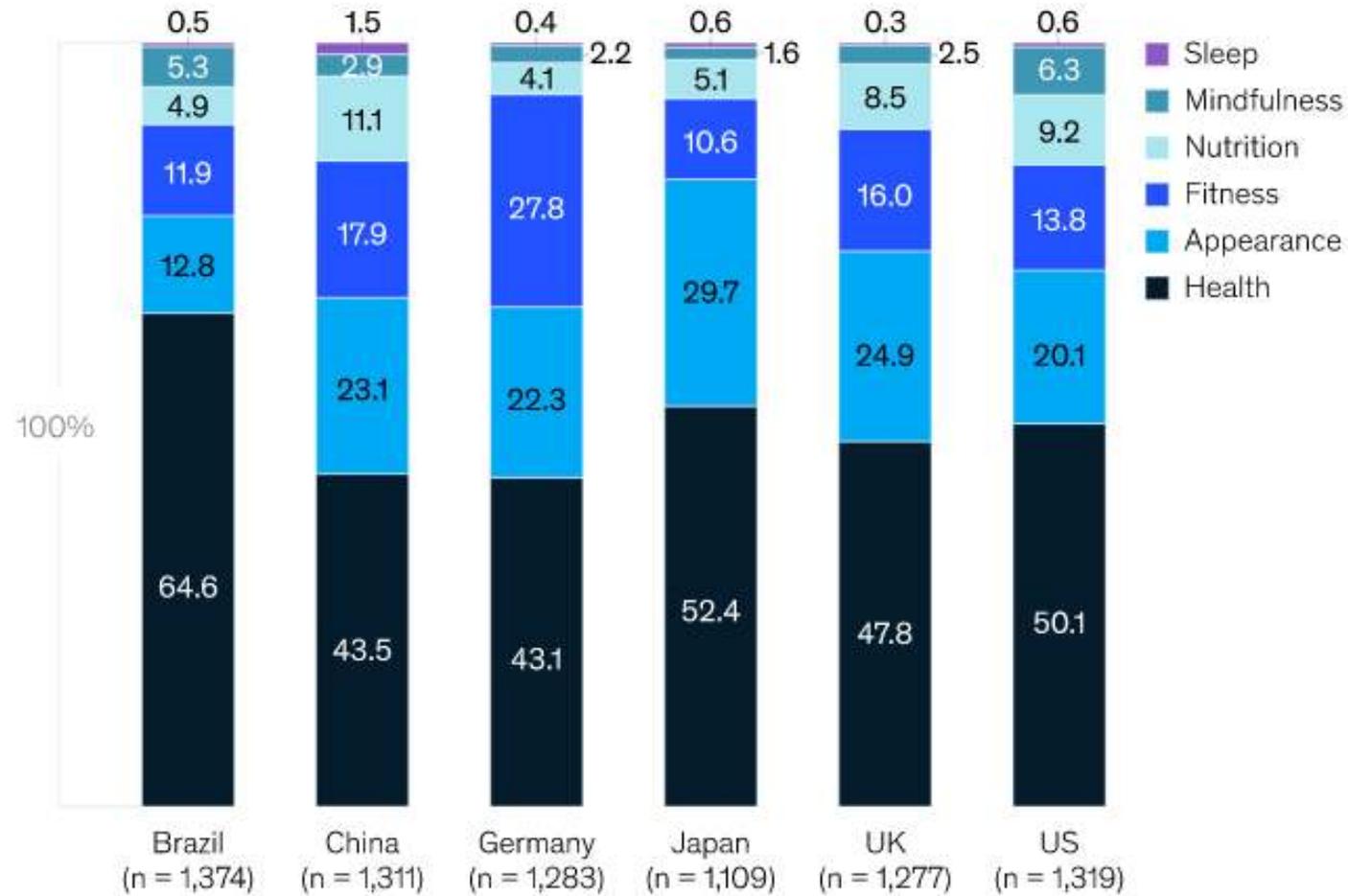
Better performance



Educate, Advocate & Activate!



Wellness spending by category,¹ % of annual spending on wellness products and services





Hyper-personalization is Luxury

Let's make it bespoke !

Luxury experts suggest that authentic luxury goods cannot be mass produced

A facial serum for all, customized according to what your skin requires.

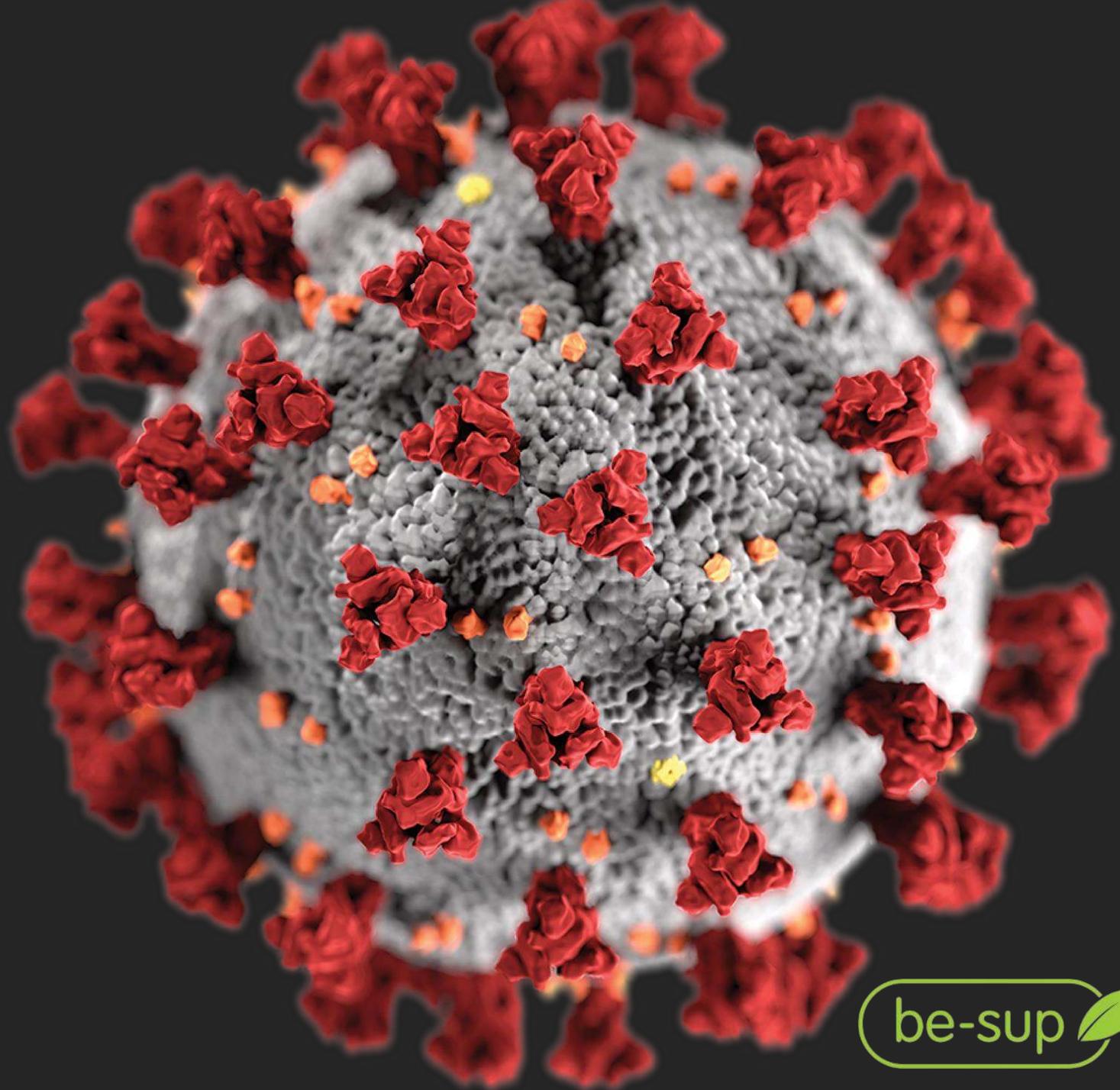
Product uniqueness has the potential to propel hyper-personalized products to luxury status

Coronavirus as Catalyst

The consumer focus on boosting immunity and maintaining overall wellness has resulted in an increase in supplements and fitness equipment.

People are now conscious about what they eat and what they apply to their skin.

They had ample time to think, act and make it a routine.





Communication with Customers

The great shift...

Communication must be...

...designed and carried out much more sensitively

...aligned with increased global health concerns due to Covid

Because...

...population has become more cautious with regard to their health

...population place high value on health & have become more health conscious

Target- The Millennials & Gen Z Generation-

They favor a more holistic approach to health and well-being. Wellness is viewed by customers through a much broader and more sophisticated lens, which includes not only fitness and nutrition but also entire physical and mental health and beauty.

The Opportunity-

If the epidemic has taught us anything, it is that physical and mental health will continue to be a top issue for millions of people all over the world for a long time.

The foreseeable future-

Approaches to immunological health that are based on evidence, with metabolic health, the microbiome, and tailored diet at the forefront. We'll also see increased research on everything from "positive stress" to intermittent fasting for immunological resilience.



Nature Tourism- *wellness travel as more mindful experiences*



Resetting the workplace- a new trend at workspaces with wellness at core.



Self-care Nutrition- Stop Boosting, Start Balancing



The very basic pleasures and behaviors transforming – what is wellness!



2021 TRENDS AND BEYOND

PROJECTED IN THE FOOD SUPPLEMENT INDUSTRY

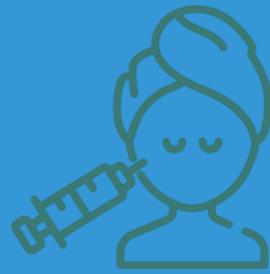


1

STRESS FREE

FOR BETTER SLEEP AND LOWER STRESS LEVELS

Ayurvedic Herbs, B-Complex Vitamins, Magnesium



2

BEAUTY SUPPORT

TREATMENT FROM INSIDE OUT

Collagen peptides, vitamin C, and omega-3s



3

IMMUNE BOOSTER

TRADITIONAL ALTERNATIVE

medicinal mushroom extracts i.e. chaga, cordyceps, lion's mane, and reishi mushrooms



4

PERSONALISED NUTRITION

GENETIC TEST

"aimed at meeting specific nutritional and health objectives"



5

ALWAYS ORGANIC

ECO-SUPPLEMENT

"the need to consume "healthier" ingredients and the consumers' increasing concern for "sustainability"

Thank you for your attention!



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Merci Philippe Girardon et le Domaine de Clairefontaine, Be Sup et Bruges de votre accueil, de vos ... foods and supplements