



# Top Five Trends in Consumer Health

December 2025

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Our expert's view of consumer health in 2025

Key findings

## INTRODUCTION

Key facts to share

Top five trends in consumer health

Top five trends uncovered

## THE FIGHT FOR THE FUTURE OF PROTEIN

Protein claims expand in 2025 across packaged food, dairy, and recently soft/hot drinks

As of 2025, more women than men are seeking to increase their protein intake

Protein has one of the most obvious and attractive growth profiles in consumer health

Musclespan is a strong appeal point, with sports physique emphasised in brand imagery

Kate Farms formulating for women on GLP-1 with specific protein needs

At 55:45, the UK has an above average ratio of women to men who are adding protein

Adding functional ingredients to established food and beverage categories is ongoing

PepsiCo's acquisitions blur the line between sports protein and dairy beverages

The search for differentiation is eroding the distinctive lines between industries

Protein is given next lease of life, with new buyers and a need to abandon stereotypes

## HEALTH IS BEAUTIFUL

Health rises as a core definition of beauty, whilst beauty is rising as a motive for health

Skin health is dominant, mentioned on nearly all SKUs with any type of beauty claim

Main ingredients listed on SKUs supporting beauty claims increasingly include NAD+

Amorepacific's K-Beauty brand builds complementary topical and ingestible solutions

This topical and ingestible combination trend is spreading in the Americas too

Clever format as well as message ideas are coming out of South Korea

Holland & Barrett is overhauling UK stores to accommodate beauty after running trials

Retailers are bringing down the wall between health and beauty just as fast as brands

Beauty sees faster growth, an opportunity health companies can exploit to accelerate

## LONGEVITY AND LIVING BETTER FOR LONGER

The pursuit of a longer healthspan sees a surge of life, investment and launches in 2025

Healthspan-related claims on supplements are rising, focused on specific areas

Claims can be mapped against ingredients, and NAD+ stands out as it escapes niche

Today's priorities flip completely when consumers enter new life stages

Differentiation in chronic and general health turns to narrower demographic targeting

IM8 exemplifies what happens next in healthspan when shoppers believe in anti-ageing

A media narrative that NAD+ peaked and is falling in 2025 seems to be missing context

Healthspan is an area for solid gains, while the cellular health potential is spectacular

## TARIFF IMPACTS RIPPLE BEYOND THE US

US protectionism across the forecast period requires reviewing global supply strategy

Tactical price tracking shows tariff-driven price rises arriving in waves throughout 2025

Some of the top 20 consumer health brands in the US see strong price jumps in 2025

A trade correction will seem punitive if imbalances have normalised over time

US tariffs are fast-changing; by the end of 2025, a mixture of rates proliferate

"This will pass" is not viable; shareholders and profit protection dictate a supply rethink

## THE CHANGING SHAPE OF OTC DEMAND

Demand stagnates, and while decline is US-centric, OTC purchase drivers are global

US versus rest of world has stark gaps, but similarities (eg eye care) are interesting too

Studying cough/cold remedy sales correlations – the US shows a saturation story

Studying cough/cold remedy sales correlations – Italy is developed, with more potential  
Studying cough/cold remedy sales correlations – China has low but rising penetration  
Total spend fell slightly long-term in US (ignoring COVID-19 spike), with a big mix change  
One reaction is to extend the mission to achieve relevance beyond seasonal peaks  
Early warning of colds and flu opens a greater opportunity for focused spend moments  
Investing in supplements for growth is appealing, but OTC needs an expanded mission

## CONCLUSION

Future implications  
Key opportunities for growth (and the defence of existing value) in consumer health

## APPENDIX

Reading these bubble charts: Historic data

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