

# Delivering the goods

Supplement formats  
in favour



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Supplement delivery systems have expanded beyond the conventional capsule, tablet, powder and liquid formats. With Millennials making up a vast portion of today's consumer market, manufacturers can't ignore their lifestyle needs and demands. **Maryellen Molyneaux** delves into how businesses can engage younger consumers and outlines how the supplement industry should seek to develop convenient, fun, tasty and palatable formats.

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Bone and joint supplements in capsule form remain a firm favourite amongst manufacturers, but demand to reduce the pill burden and improve ease-of-use is becoming more prevalent. **Jaume Reguant** discusses what manufacturers need to consider to give rise to new solutions that allow the safe and efficient delivery of ingredients to support mobility.

### 9 The potential for smart packaging

With smart items so ubiquitous, it shouldn't be a surprise that smart packaging has finally reached the market. For the nutrition industry, smart packaging has the opportunity to improve people's lives, while providing previously unattainable user data. **Netta Kailler** explains the technology behind smart packaging, and the big benefits for both supplement consumers and businesses.

### 12 Exploring the unique benefits of thin film delivery

The design of thin film, often referred to as PharmFilm, as an oral delivery technology offers several advantages over other popular delivery formats. While initially used primarily in the pharmaceutical space, this unique technology offers significant benefits in the dietary supplement arena. **Harold Baum** outlines the benefits and advantages of thin film delivery format.

### 14 Takeaways



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# Spotlight on supplements

**F**“Formulation,” “innovation” and “technology” seem to be the industry buzzwords that manufacturers keep top of mind when thinking about the ‘next big thing.’ We know they’re paying attention because each time a new dietary supplement product lands on the market, it’s more forward-thinking than the last. You only need to look around a Vitafoods trade show to see the innovation that the market is delivering – undoubtedly driven by business’ commitment to consumer health needs and demands.

Whether it’s general wellbeing or managing more serious conditions, consumers are taking their health seriously and an understanding of supplement benefit is evident. While that’s all good and well, consumers are unexcited about conventional pills and tablets and instead seek to get their supplements in food form, hence the tremendous growth in alternative formats like beverages, shots, snack bars, and chews. However, formulation opportunities can differ from market to market, and even ingredient to ingredient. When thinking about consumer demographics, Maryellen Molyneaux says businesses simply can’t ignore the Millennial generation’s demands since they make up such a vast portion of the workforce and purchasing population. They want fun, interesting, tasty and palatable formats and manufacturers are working hard to deliver.

Speaking of fun and interesting, unconventional formats – like thin film and sprays – are making big strides especially as research backing efficacy and absorption claims advances. Harold Baum provides an overview of the unique benefits and opportunities of thin film delivery format on [page 12](#).

As the saying goes, you can lead a horse to water but you can’t make it drink. So, while brands certainly play their part in delivering innovative solutions, ensuring that consumers reap the benefits falls squarely on their shoulders. It’s on them to make sure they’re getting their daily intake and in such a fast-paced world, it’s easy to miss a dose – in turn compromising efficacy. It’s technology to the rescue to make sure we never miss a day. Netta Kailler delves into the big benefits of smart packaging, which should be hot on business’s radars for the consumer insights it has potential to deliver ([page 9](#)).

If all this is leaving you inspired to experience the latest in supplements, be sure to register for Vitafoods Asia this September.



*Charlotte Bastiaanse*

**Charlotte Bastiaanse**

**Associate editor, Vitafoods Insights**

+44 (0) 20 337 73472

[charlotte.bastiaanse@informa.com](mailto:charlotte.bastiaanse@informa.com)



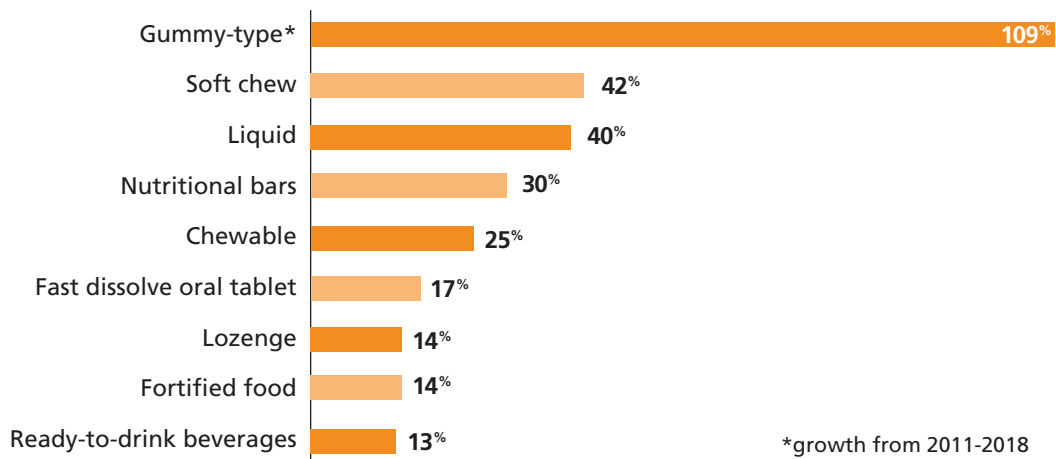
# Where's the appeal?

## Millennials drive growth in non-pill supplement forms and new delivery systems

By *Maryellen Molyneaux*

**S**upplement delivery systems have expanded beyond the conventional capsule, tablet, powder and liquid formats. Besides what can be found in the traditional supplement aisle, new alternative formats are blending into grocery store and convenience store offerings in the forms of beverages, lozenges, shots and nutritional bars. In fact, research from the Natural Marketing Institute (NMI) showed that consumers prefer a variety of alternative supplement formats, some of which have strong growth over the past several years.

### Percentage total growth of preferred formats among supplement users 2009 to 2018



Source: Natural Marketing Institute (NMI)

### Greater realities

Several factors are associated with the growth of these alternative supplement formats. First, preference for alternative supplement formats is strong and greatest among the Millennial generation. In fact, significantly more Millennials (49%) than all older generations indicate they prefer to get their supplements in other forms besides pills and capsules.

Its sheer size alone makes the Millennial generation an opportunistic target for almost any industry, but they offer a particularly strong opportunity for the supplement industry. For example, in this 24/7 world, with its quick-paced lifestyle and overwhelming pressure to stay competitive, young consumers who once considered themselves invincible are now feeling vulnerable. Therefore, any measures they can take to look and feel their best and help keep

them competitive will be welcomed. In fact, significantly more Millennials than all other generations report they are always searching for alternative ways to improve and maintain their health. Consequently, to engage younger consumers and help them “stay in the game,” the supplement industry is seeking to develop convenient, fun, tasty and palatable formats for supplements to promote supplement growth across a new array of categories that appeal to younger consumers.



“ Its sheer size alone makes the Millennial generation an opportunistic target for almost any industry.

### The greater picture

Conditions that are considered less medically treatable and more acute—such as lack of energy, sleep issues and stress—appear to be worsening, which may also be helping drive the need for alternative supplement formats. One in every two consumers (55%) indicated their energy levels are worse compared to 10 years ago, and over one-third indicated their stress levels and ability to get a good night’s sleep are worsening. Consumers suffering from these emotional conditions may look beyond traditional pill or capsule solutions and seek alternative remedies that are a better format fit for their condition, such as soothing teas or chews.

The emergence of personalised and customised nutrition is another factor driving the expansion of alternative supplement delivery systems. NMI research showed that almost two-thirds of supplement users (62%) were interested in a personalised nutritional supplement, with about half willing to use an in-home blood test or DNA test to determine their nutritional needs and deficiencies. It is not surprising that supplement users seek a more personally targeted nutritional plan, since they are not only unsure if the supplements they take are doing what they are supposed to do (50%), they are also unsure about what nutrients they are supposed to be taking for their body to function at its best (49%). Personalised supplement delivery systems may come in many formats, including customised pill packets containing specific capsules and tablets based on consumer needs, or in formats that may be more easily formulated for consumption such as bars, drinks or powders if nutrient needs are many.

### Nutrient uptake

In addition to concerns about what nutrients their body needs, consumers are also concerned about whether the nutritional supplements they take contain the stated level of nutrients they are supposed to, and if those nutrients are effectively being absorbed by their body. In fact, 57% of supplement users indicated they are concerned that when they take nutritional supplements, their body does not absorb enough of the nutrients the supplements are supposed to provide. This concern continues to promote



'bioavailability' as a successful supplement platform and may also be helping to drive expansion of new formats and delivery systems that appeal to consumers' perceptions of absorbability, such as shots or liquids.

Emerging encapsulation processes that allow a wider range of nutrients to be added to different forms and formats is also helping drive further expansion of alternative delivery systems. Encapsulating nutrients in food-like products such as drinks, bars and chewables, provides an easier, more convenient and tastier supplementation option. Almost half of supplement users (48%) felt it is important for their supplements to be available in an easy-to-use and easy-to-consume format. Even further, two-thirds of consumers who take gummy supplements (66%) reported they take them because they taste good and are more likely to take their supplements regularly if they are in a gummy form. Therefore, nutrient encapsulation in convenient and tasty formats may help to increase supplement trial, purchase and compliance.

Consumers want to be involved in their health management and show a strong willingness to use nutrient supplementation to ensure their health. This openness toward nutrient supplementation should allow continued growth for the supplement and ingredient industry across various health issues and systems of delivery. Determining what consumers will 'buy into' regarding nutrient formats will open large opportunities for nutrient expansion across an array of different formats, provided the formats fit consumers' lifestyles, align with the conditions they are managing, and make sense based on the stated benefits. ●

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*Maryellen Molyneaux (maryellen.molyneaux@nmisolutions.com) is president and managing partner at the Natural Marketing Institute (NMI, nmisolutions.com), a strategic consulting, market research and business development firm specializing in the health, wellness and sustainability marketplace.*



## Formats in favour

### Overcoming pill fatigue in the mobility market

By *Jaume Reguant*



**Bone and joint health** has become a significant public health concern across the globe. For example, osteoarthritis—a degenerative joint disease associated with ageing—is estimated to affect almost 10% of men and 18% of women worldwide, aged 60 or above.<sup>1</sup> As such, joint health is a leading category for dietary supplements, with older adults reaching for products that will help minimise their discomfort. However, in recent years the joint health market has experienced a significant shift and evolved into a wider concept—mobility—to include muscle and bone health as well. Reflective of this, recent consumer surveys demonstrate that mobility is now considered a key health priority across all ages, as individuals look to stay active and healthier for longer. Driven by an ageing population, a rise in health consciousness and an increase in the amount of physical activity in which individuals now partake, the demand for combination supplements that offer a holistic solution and preventative benefits is therefore growing rapidly.

### Popular delivery formats

Bone and joint supplements in capsule form remain a firm favourite amongst manufacturers, as they enable the safe containment of a wide range of ingredients including powders, liquids and semi-solids. Such dosage forms are also a popular choice with consumers, with almost half of shoppers preferring supplements in a capsule form. However, demand to reduce the pill burden and improve ease-of-use is becoming more prevalent. For instance, consumers are increasingly seeking products that offer greater convenience, better efficiency, reduced dosage and ease of swallowing. This has led manufacturers to consider new solutions that allow the safe and efficient delivery of ingredients to support mobility. In addition, an increasing number of manufacturers are also looking to develop ingredients that support reduced pill intake to overcome the ‘pill fatigue’ challenge.

### Innovative ingredients

Within the mobility space, it is particularly challenging to develop nutritional solutions that will reduce pill intake while promoting a therapeutic benefit as many ingredients that are widely used to support bone and joint health, such as collagen, are required at high dosages to be effective. One way to overcome pill fatigue is to offer supplements that comprise ingredients or ingredient combinations that will work effectively at lower dosages.

Hydrolysed type II collagen is typically used in joint health supplements as it can be easily formulated into small capsules and tablets. However, evidence suggests that native type II collagen—essentially type II collagen in its biological form—can support mobility at lower doses. Unlike hydrolysed collagen, which is absorbed by the body so it can reach the cartilage to be effective, native collagen maintains its three-dimensional structure and is recognised by the immune system as an endogenous ingredient. As it works through an immune-mediated process, the daily dose and intake required for native collagen to be effective in the body is significantly lower than the dosage required for hydrolysed collagen. Bioactive, native collagen form is only required at 40 mg/d, whereas the recommendation for hydrolysed collagen is between 5-10 g/d.

Hyaluronic acid is a key molecule in joint lubrication. In conditions where joint discomfort is evident, individuals typically experience a reduction in the quantity and quality of hyaluronic acid in the synovial fluid of joints. Similar to native type II collagen, hyaluronic acid is required at doses as low as 40-80 mg/d, meaning it can be easily formulated into supplements with other ingredients. By developing solutions that include both native type II collagen and hyaluronic acid, manufacturers can meet increasing consumer demands for more convenient, easy-to-consume products. ●

### Case study: Success in the mobility market

By including ingredients with enhanced bioavailability, manufacturers will be in a better position to meet consumer demand for fast-acting solutions with reduced dosage requirements. An example of an ingredient with enhanced bioavailability is a natural origin type II collagen, b-2cool® by Bioiberica, that targets collagen degradation occurring in common joint disorders. Extracted from chicken sternum, the manufacturing of the ingredient is controlled to maintain its characteristic triple helix structure and the specific biologically active epitopes of the native protein.

Another ingredient with a high concentration of hyaluronic acid (60-75%), in addition to polysaccharides (>10%) and collagen (>5%), called Mobilee® by Bioiberica, can also be incorporated into supplements at low dosages (40-80 mg/day) due to the synergistic effects of its three ingredients.



*Jaume Reguant is Healthcare Director at Bioiberica S.A.U. Bioiberica is a global life science company, with its core business being the identification, extraction and development of animal-derived biomolecules, which are transformed into high quality products for the pharmaceutical, nutraceutical, veterinary, feed and agricultural industries.*

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1 WHO, 'Chronic rheumatic conditions', 2019.



# Connecting packages

## The potential for smart packaging to close the circle

By *Netta Kailler*



**W**hen ordinary objects first started to connect online, it seemed like a thoughtful way for brands to engage digital natives and generation groups, like millennials. In 2013, we were introduced to an undergarment that could send out Tweets. The Consumer Electronics Show in 2014 showcased a basketball that coached players through an app. Last year, the world was introduced to SMALT, a connected salt shaker that allows users to control the amount of salt they pour on their food and also plays music through its Bluetooth-connected speaker because, why not?

Over time, smart objects grew smarter. The technology became less expensive to install, and smart objects were designed to add value to people's lives. Connected home appliances help users save money on electricity, and there is a wealth of connected security devices on the market keeping families and their property safer. There are thousands of products, from smart sprinklers that only turn on when there is no rain forecasted, to connected cars with an ability to call for help when the driver is incapacitated.

With smart items so ubiquitous, it shouldn't be a surprise that smart packaging has finally reached the market. For the nutrition industry, smart packaging has the opportunity to improve people's lives, while providing previously unattainable user data.

### What is a smart supplement package?

Ordinary items become smart when they are implanted with a microprocessor chip and have a means to communicate with a device. For supplements, that typically means a chip embedded in the cap that can transmit information to a user application.

Bottle caps offer a unique perspective into user behaviour. They are smart enough to note when a pill bottle has been used, and the technology can even recognise how many pills have been taken and how many are left.

### What's in it for consumers?

In October 2018, the [Council for Responsible Nutrition](#) (CRN) reported that the use of dietary supplements in the United States increased by over 5% to 75% across all age groups. It is evident that Americans are thinking about their health, and looking toward supplements for everything from overall wellness to weight management, to hair, skin and nail care.



Unfortunately, supplements aren't that valuable when consumers don't adhere to the recommended dosage. The [Permanente Journal](#) reported nearly half of all Americans with chronic diseases are non-adherent to their prescription medications.<sup>1</sup> It's not a stretch to assume similar or even poorer non-adherence rates for supplements, which are primarily used in a preventative capacity.

Smart packaging, however, provides consumers with a new opportunity to maintain their supplement regimen. Smart caps can remember when a bottle has been accessed. If the user hasn't opened the bottle by a set time, the cap can light up and vibrate, reminding the user to take their supplement.

Additionally, the cap communicates with the user's mobile device. When the bottle is left alone on the table or in a medicine cabinet, users receive notifications reminding them to take their supplement. For digital natives who are constantly connected to their mobile device, this reminder system could be the difference between adhering to a recommended regimen or leaving an unopened bottle on the kitchen table.

### Wouldn't a regular alarm work just as well?

Alarms ring regardless of whether the user has taken a pill. This trains consumers to ignore their alarms and reminders. On the other hand, the smart package only notifies users that they need to take a supplement if they need to take their supplement.



### What's in it for brands?

The brand story is where smart packaging gets interesting. First, smart packages can directly influence and increase sales. Second, actual usage data can help shape packaging inserts and marketing campaigns. Finally, it opens up the relationship between brands and consumers.

### Higher Sales Results

#### Increasing consumption

Consider a package with 60 multivitamin tablets that retails for \$29.99. If consumers take their pill daily, they'll go through six boxes a year and spend \$179.94. However, if they miss just one pill a week over the course of the year, they'll only go through five packages, and spend 16% less. If they miss two pills a week, their annual spend drops by 33%, to just \$120.96.

Smart packaging could increase consumers' adherence to recommended dosages. By communicating through the consumer's mobile device, the product can directly engage digital natives through the channel they prefer; it also assists seniors who might have difficulty remembering to take their supplement. When consumers use their product as directed, there is a natural increase in units sold.

### Automatic reordering

On a related note, smart packaging knows when the product inside is running out. When the product reaches a predefined level, the app can include automatic or one-touch reorders to ensure consumers never go a day without their health supplements.

### Big data insights

Most consumer-packaged goods (CPG) companies lose sight of their products after they leave the factory. Firms have no visibility into the way consumers use their products. They don't know how often those supplements are taken, or whether consumers prefer to take supplements during specific meal times, as an example.



However, if companies had better insight into actual usage, they could develop marketing and engagement programs to increase adoption and usage, and the app could provide them with supplemental demographic data.

For example, if data showed most adherent users took their supplements in the morning while most non-adherent users took their pill in the evening, manufacturers could create marketing campaigns and package inserts showing their supplements being consumed at the breakfast table.

### Direct consumer engagement

Perhaps the most dramatic change smart packaging introduces is direct brand-to-consumer engagement. Once consumers opt in, brands could have the opportunity to directly engage their customers through their mobile device.

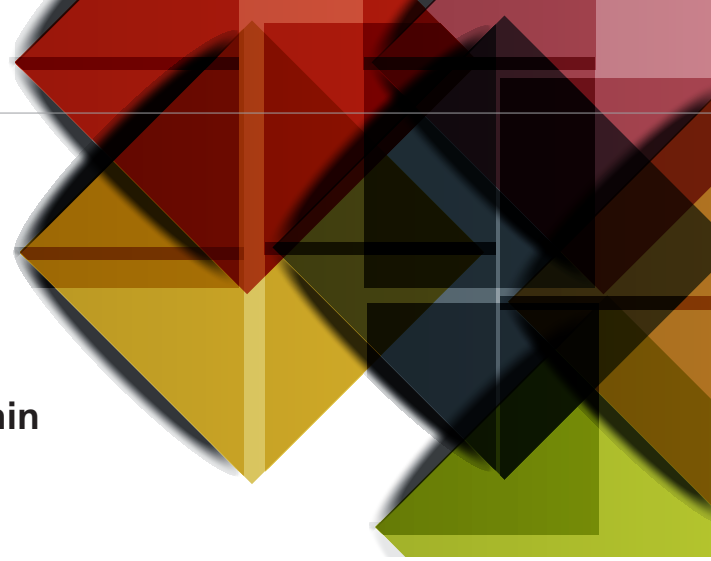
This engagement could take place through different forms—instructional videos for new users, or inspiring videos showing product benefits for users who haven't taken their supplement in recent days. Gamification and social sharing could be introduced, with prizes, badges, and discounts for consumers who don't miss a day.

Through smart packaging, brands could maximise the opportunity to introduce new products or try to upsell consumers to next-level products. For consumers who need a push to reorder their existing supplement, brands could create special, limited time offers that are available exclusively through the mobile app. ●

*Netta Kailler is the marketing manager and head of health at Water.io. A registered dietician with deep marketing experience, Netta was inspired to join Water.io so she could actively combat non-adherence. Today, she stands at the forefront of the personal well-being revolution, developing solutions for health supplement adherence.*

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1. Kleinsinger, F. (2018). *The Unmet Challenge of Medication Nonadherence*. *The Permanente Journal*. Published online 5 July 2018. PMID: PMC6045499



## Tip of the tongue

### Exploring the unique benefits of thin film delivery

By Harold Baum

**The design of thin film**, often referred to as PharmFilm, as an oral delivery technology offers several advantages over other delivery formats, such as ingestible tablets, chewable tablets, orally dissolving tablets, softgels, liquids or inhalants. While initially used primarily in the pharmaceutical space, this unique technology offers significant benefits in the dietary supplement arena.

#### Absorption and action

The sublingual (under the tongue) and buccal (cheek) delivery of an active thin film has the potential to improve the onset of action, lower the dosage, and enhance the efficacy and safety profile of the nutritional ingredients. All tablet dosage forms, softgels and liquid formulations primarily enter the bloodstream through the gastrointestinal tract, which subjects the actives to degradation from stomach acid, bile, digestive enzymes and other first-pass effects. As a result, such formulations often require higher doses and generally have a delayed onset of action.



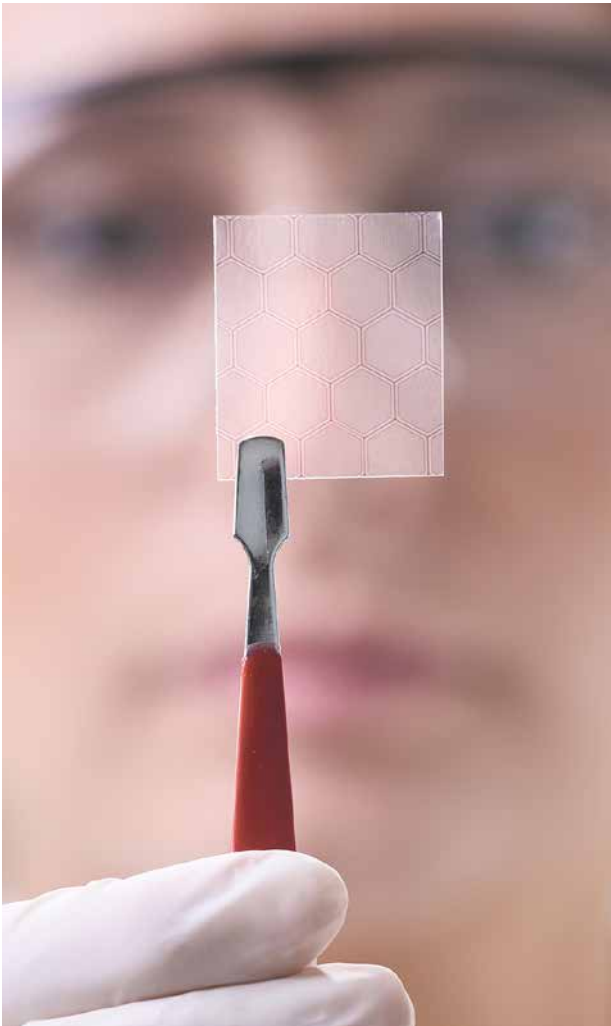
“ **The sublingual and buccal** delivery of thin film has the potential to improve the onset of action, lower the dosage, and enhance the efficacy and safety profile of nutritional ingredients.

Conversely, buccal and sublingual thin-film drug delivery can avoid these issues and yield quicker onsets of action at lower doses.

#### Big benefits

Other advantages of oral thin film include:

- Stable, durable and quicker dissolving than other conventional dosage forms.
- Enables improved dosing accuracy relative to liquid formulations since every strip is manufactured to contain a precise amount of the actives.



- Thin film not only ensures more accurate administration of ingredients but can also improve compliance due to the intuitive nature of the dosage form and inherent ease of administration. These properties are especially beneficial for paediatric and geriatric populations where proper and complete dosing can be difficult.
- The ability to dissolve rapidly without the need for water provides an alternative to patients with swallowing disorders and to patients suffering from nausea.
- Thin film delivery has the potential to allow the development of sensitive ingredients that otherwise may not be possible in tablet or liquid formulations.

It has been estimated that nearly 40% of consumers are averse to swallowing pills. Sublingual film delivers a convenient, quick-dissolving target dose that rapidly absorbs under the tongue to ensure compliance, and has great taste. With a growing elderly population and parents interested in unique supplement delivery formats for their families, thin film delivery can open new commercial opportunities for innovative companies. ●

*Harold Baum is the managing director of [Dyna-Tabs](#), a producer of unique supplements in thin film format that incorporate vitamins, minerals, botanicals and other actives.*

## Takeaways for your business

**A growing interest** in maintaining general wellbeing, preventing the onset of illness, and a rise in health conditions such as low energy, unhealthy sleep and stress have driven further demand of dietary supplements. While consumers recognise the value and benefits of dietary supplements, they actively seek out alternative formats beyond conventional tablets and capsules. Over the years, the market has seen beverage, lozenge, bar and chew launches, and interestingly, research reveals that gummy supplements have increased in popularity by over 100% since 2011.

The Millennial generation are great drivers of alternative delivery formats, especially edibles and beverages. The sheer size of this population group makes the Millennial generation an opportunistic target group for almost any industry; brands need to play close attention to changing needs and demands in order to keep up with the future direction of purchase.

Research shows that alternative delivery formats are in favour, however, 57% of supplement users indicate concerns efficacy and absorption. When considering a format, such as a gummy, liquid or chew, supplement manufacturers should be mindful not to forego efficacy over formulation appeal.

While it's important for businesses stay up to date with trends across the industry, there's no one-size-fits all across individual markets. At a micro level, isolated ingredients may not be successful nor effective when delivered in a particular format. As an example, ingredient specialists in the bone and joint space acknowledge the demand for alternative formats and reduced dosage instances, however, there is the challenge of developing solutions that will reduce pill intake while promoting a therapeutic benefit as many ingredients that are widely used to support bone and joint health, such as collagen, are required at high dosages to be effective. Experts can seek alternative ingredients, such as native type II collagen which maintains its three-dimensional structure, works through an immune-mediated process, and has a significantly lower dosage requirement than hydrolysed collagen.

Thin film, or PharmFilm delivery has proved successful as a solution for absorption and dosage concerns. Unlike softgels, gummies or liquids, sublingual or buccal delivery does not subject the contents to early degradation caused by stomach acid, bile or digestive enzymes. Further research confirms claims of absorption, efficacy and quick onset of action. Thin film is certainly a delivery format worth considering for consumer demographics that struggle with swallowables.

Although there is an understanding of how dietary supplements can address health concerns and conditions, consumers are charged with the responsibility of adhering to consistent and correct dosage. The emerging technology of smart packaging is growing in popularity as it delivers benefits to both consumers and businesses. Supplement users are able to maintain regular intake and businesses can better understand user data and behaviour, which lends valuable learnings for future product development. ●

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**Jon Benninger**  
**Vice President & Market Leader,**  
**H&N SupplySide Portfolio**

[jon.benninger@informa.com](mailto:jon.benninger@informa.com)

**Heather Granato**  
**Vice President, Content**

[heather.granato@informa.com](mailto:heather.granato@informa.com)

**Danielle Dunlap**  
**Vice President, Marketing Services**

[danielle.dunlap@informa.com](mailto:danielle.dunlap@informa.com)

**Andrew Rosseau**  
**Art Director**

**Madison Dorn**  
**Program Coordinator**

**Informa Markets**  
**2020 N. Central Ave, Suite 400**  
**Phoenix, AZ 85004**  
**United States**

**Phone: +1 480 990 1101**

[www.naturalproductsinsider.com](http://www.naturalproductsinsider.com)

**Chris Lee**  
**Managing Director, GHNN Europe**

[chris.lee@informa.com](mailto:chris.lee@informa.com)

**Gareth Morris**  
**Head of Sales**

[gareth.morris@informa.com](mailto:gareth.morris@informa.com)

**Maria Sidiropoulou**  
**Client Success Manager**

[maria.sidiropoulou@informa.com](mailto:maria.sidiropoulou@informa.com)

**Stephanie Campos**  
**Client Success Executive**

[stephanie.campos@informa.com](mailto:stephanie.campos@informa.com)

**Charlotte Bastiaanse**  
**Associate Editor**

[charlotte.bastiaanse@informa.com](mailto:charlotte.bastiaanse@informa.com)

**Informa Exhibitions**  
**240 Blackfriars Road**  
**London SE1 8BU**  
**United Kingdom**

**Phone: +44 (0) 20 7921 5000**

[www.vitafoods.eu.com](http://www.vitafoods.eu.com)

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