

IN THE FLOW OF CHANGE

# **RUSSIAN CONSUMERS AND FOOD SUPPLEMENTS: CURRENT TRENDS**

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**ANASTASIYA ZHARIKOVA**  
RESEARCH EXECUTIVE,  
HEALTHCARE, IPSOS IN RUSSIA



**Food supplements (FSs) are still a relatively new trend for Russia. In comparison to more developed markets such as Japan, the USA and India, where their consumption reaches 50-90%, Russian consumers are just starting to familiarize themselves with various vitamin complexes. They are examining the qualities of food supplements as well as their peers' and influencers' attitudes towards them. This article describes what triggers interest in food supplements and what future this niche might have.**

The interest in vitamin enrichment emerged in 1972 with the adoption of preventive health measures at the state level. At that time, the emphasis was on increasing the amount of vitamin C in citizens' diets to counterbalance the deficiency caused by the absence of year-round access to fruit and vegetables. Later, in 2008, as Russia noticed a deficiency in vitamins B, C, E, and D among the population, the state increased recommended dietary allowances for these vitamins and became concerned about the micronutrient value of products consumed by the population.<sup>1</sup> Now it is possible to replenish deficient elements using a

wide range of dietary supplements. But this is not the only reason for taking food supplements.

The food supplements segment has been growing in both physical and monetary terms in the past few years. This growth was triggered by pharmaceutical giants becoming interested in food supplements. The niche, already developed in western and eastern countries began to form in Russia as well. So, who is the target audience for this booming industry? What stimulated consumers to take various types of vitamins and food supplements?

## TARGET AUDIENCE FOR FOOD SUPPLEMENTS

Today, the core consumers of food supplements are middle-aged and older women who are active, fit to work, and taking care of themselves in different ways. Some of them are focused on leading an active life and maintaining energy for everyday duties

and activities. Others concentrate on maintaining harmony and balance in all areas of their life. Another group seeks to preserve and maintain their attractiveness and beauty. Food supplements can actively support in all these areas.

**The downward trend in the traditional notions of femininity<sup>2</sup> and masculinity in Russia suggests that the current, predominantly female, target audience will be “diluted” by young men taking care of themselves.**

## FOOD SUPPLEMENTS IN RUSSIAN CONSUMERS' LIVES

### Regional factors

The climatic conditions of the northern regions where Russia is mostly located, with its low thermal insulation, in addition to factors such as the economic recession and high rates of depression among the population mean that the population – especially women, who are the main consumers of OTC medicines and supplements – look for ways to improve their condition. This implies not only enriching their diet with

vitamins, but also relieving stress factors and improving energy and performance. Generally, in Russia, immune-boosting supplements have topped the list of consumed food supplements during the past two years of the pandemic.<sup>3</sup>

### Wellbeing

More and more Russians of the “Silver Age” generation (55+) who play a significant role in the country's economic and demographic

<sup>1</sup> Vitamin C enrichment or vitamin and mineral complexes? Medkontakt. 12.05.2016

<sup>2</sup> Women's Beauty and New Victorian Era. Ipsos Flair Russia. 2021

<sup>3</sup> Ipsos. RusIndex Research (HealthIndex). 2021/Q2. Russians, 16+, 100k+ cities

development want to maintain their health and abilities for a longer time. Compared to other generations, they are most motivated to lead a healthy life and regularly undergo medical examinations.<sup>4</sup>

The findings of a 2021 Ipsos Global Advisor survey show that 85% of Russians say that they consider their mental and physical health to be equally important (above the global country average of 79%).<sup>5</sup> Emotional comfort is an important factor in maintaining mental health, and women seek this through, among other things, food supplements; for example, vitamin and mineral complexes for beauty, body purification or weight loss, depending on their needs. Sedative medicines also play an important role

## Food supplements based on natural ingredients primarily give consumers a sense of safety.

This fear makes consumers prefer “mild-acting” products and medicines, while food supplements are perceived as preventive agents, or products with a more delicate mechanism of action. Long-term and “natural” product

in wellbeing, particular in pandemic conditions which generate high levels of anxiety.

### Food supplements and Russian “folk remedies”

The typical cultural approach to health and beauty care taken by Russian women is a popular method of self-care and treatment at home. The traditional act of obtaining natural medicinal extracts from plants have become the foundation for large domestic beauty brands and pharmaceutical products. This essentially packages ready-made folk formulas in convenient product formats for modern women. The fear of long-term side effects caused by synthetic products is a common concern.

courses enable people to work with a future outlook, i.e., preventively.

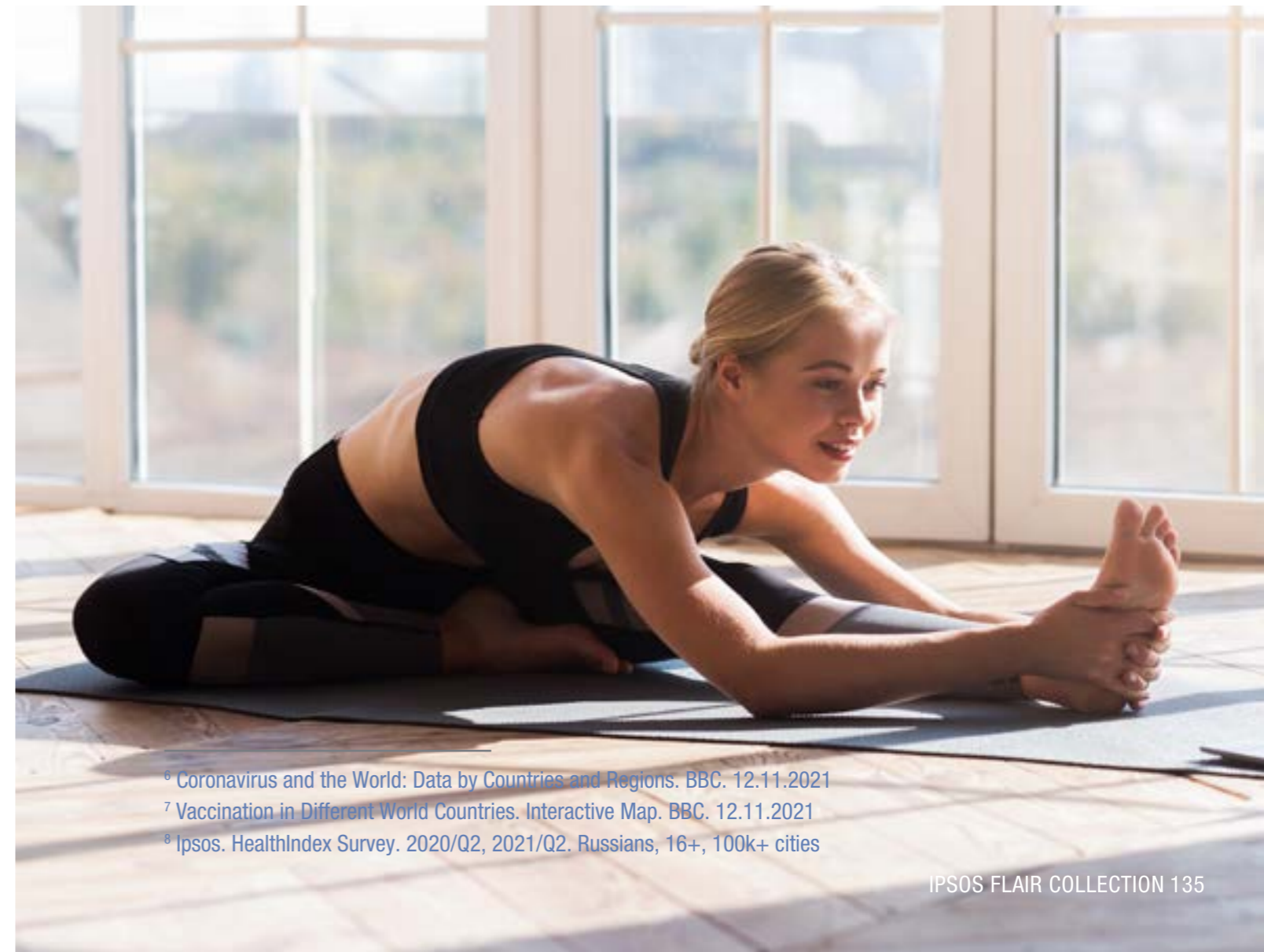
Pharmaceutical companies are responding to market demands for more “natural” products and creating

umbrella brands to meet consumer needs. They primarily focus on anti-cold medicines, sedatives, vision protection, gastrointestinal health products, and so on.

### Immune system reinforcement is not a seasonal trend anymore

Russia is one of the top five countries suffering the highest Covid-19 mortality rates<sup>6</sup> while vaccination coverage is still low.<sup>7</sup> In this way, the need for immune system reinforcement will accompany pandemic peaks and work within

the framework of the preventive healthcare approach during off-peak periods. Russians are visiting doctors less often during the pandemic as health professionals are too busy, and many people are afraid to visit hospitals because of a possibility of catching the infection. Self-treatment is a more common approach than regular doctor visits. This is where immune-boosting preventive products come into play.<sup>8</sup> Unlike constantly emerging new medicines, natural products do not lose their relevance.



<sup>6</sup> Coronavirus and the World: Data by Countries and Regions. BBC. 12.11.2021

<sup>7</sup> Vaccination in Different World Countries. Interactive Map. BBC. 12.11.2021

<sup>8</sup> Ipsos. HealthIndex Survey. 2020/Q2, 2021/Q2. Russians, 16+, 100k+ cities

<sup>4</sup> Ipsos. RusIndex Research (HealthIndex). 2021/Q1. Russians, 16+, 100k+ cities

<sup>5</sup> Ipsos. World Mental Health Day 2021: A Global Advisor Survey. October 2021. Base: 21,513 online adults in 30 countries, including Russia

# THE FUTURE OF FOOD SUPPLEMENTS

The emergence of food supplements outside pharmacies is new to Russian consumers, but it is beginning to dispel the popular misconception that food supplements are medicines. Clear differentiation between food supplements and medicines makes it possible to take a clearer look at the functions of these products and simultaneously increase their availability.

New product formats may appear thanks to the development of other product areas. One of the articles in our previous Ipsos Flair Russia 2021 issue predicted the release of vitamin complexes as electronic vaporizers by analogy with inhalers.<sup>9</sup> It remains

highly possible due to the increasing popularity of evaporative systems.

One may expect that, owing to increasing health concerns<sup>10</sup>, more people will be taking a conscious approach to food supplements and undergoing examinations before they start taking these products. An evolving personified approach may turn into the development of an individual “single magic pill” formula that will simultaneously act in all desired areas. Personalized formulas already exist in the beauty market, for example the OpenFace personalized beauty products. It is plausible that vitamins could use the same approach as well.

## KEY TAKEAWAYS

- Traditional and natural approaches to health and beauty care are not their relevance in Russia, instead they are adapting and fitting to new trends such as food supplements. This is also relevant to immune system reinforcement amid the pandemic, personal care, mental health, and so on.
- “Packaged” or “ready-made” natural products offer a sense of safety that many people are craving today. It allows modern women to find traditional “folk remedies” in up-to-date and convenient product formats.
- The future development of food supplements may include new product formats such as inhaled options, and personalized formulas.

<sup>9</sup> Past, Present and Future of the Nicotine Category. Ipsos Flair Russia. 2021

<sup>10</sup> Ipsos Global Trends 2021: Aftershocks and continuity | Ipsos MORI