The Evolution of Collagen and Bone-Broth Formulations in the U.S. Market

In recent years, bovine collagen, marine collagen, and bone-broth ingredients have experienced significant growth in the U.S. marketplace. Let's explore the evolution of the market, as experienced by brands and consumers.

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NUTRITIONAL OUTLOOK: What sparked the growth of collagen in the U.S. market?
FORCE: It's largely centered around the coffee event. Going back five or six years, the quality of bovine collagen significantly improved to stir directly into a cup of coffee without tasting it or having solubility issues. Around the same time, several big brands latched onto this and started marketing around this stir-in concept. They were able to commandeer a new event with consumers that you don't see much with dietary supplements—adding collagen to the daily at-home coffee ritual.

If you look at the data, consumers learned to take collagen once a day every day for several months to see results; this helped the initial concern of *I don't see results after two or three days of use.* This acceptance and the coffee event helped catapult collagen into the home so that it became a household name.

NUTRITIONAL OUTLOOK: How is collagen being marketed across multiple categories reaching different audiences?
FORCE: The claims used with collagen are beauty from within—hair, skin, and nails—and bone and joint health. Collagen growth started four to five years ago with the explosion of the beauty-from-within category. Social media latched onto a beauty-from-within supplement brand that showed legitimate results. In addition, the product had a unique consumer experience—a powder that you can stir into coffee or shakes, etc.

Collagen was also able to leverage other clinical data sets. Take joint health, for example—collagen became a household name with consumers and opened the door for joint health to get a foothold in sports nutrition. Now we see a lot of the major sports-nutrition brands launching a standalone collagen skew centered around joint health for help with recovery and long-term health associated with hard workouts. I think beauty from within really laid the groundwork, but then as things progressed, we saw it expand out into these other categories and serve as a unique line extension and a new revenue stream for a lot of dietary-supplement brands.

NUTRITIONAL OUTLOOK: What do you see with product development in the collagen space?
FORCE: There is still a lot of room. And now, big brands are doing line extensions. But if you look at the data, 70 - 80% of the collagen volume in the United States is a standalone skew in the powder space. The current dose is 20 g, but there is clinical data available at 5 or 10 g. So, there is room to play with. If you look at the cost of goods, it might not be such a challenge going from a powder to a beverage if you can reduce that 20-g dose to 5 or 10 g in a drink—beverage is wide open. Collagen is uniquely functional in a beverage and works across a wide range of categories and can deliver a clean beverage with no viscosity.

There is also a lot of room in the powder ready-to-mix (RTM) space. A couple of brands are playing around with mixing collagen in the superfood and meal-replacement spaces, calling out, 5 or 10 g. So the question becomes, how can you augment existing skews with a lower clinical dose as an add-on as opposed to just the standalone product?

Another factor is the origin of the collagen itself: The majority of the market uses bovine-derived collagen, but in Japan, for example, marine collagen has dominated the past 10 years. Marine collagen can taste better than bovine when done correctly, so there are some sensory opportunities and a broad range of product development opportunities in the collagen space. We are just starting to scratch the surface in terms of possibilities, and I think we'll see a lot more of this ingredient used in different ways in the coming years.

NUTRITIONAL OUTLOOK: What other collagen ingredients exist outside of the typical bovine collagen?
FORCE: Again, the majority of the market is bovine, but marine is starting to get a foothold and has launched in some major FDM and big box stores in the last six months. Pork collagen is available, but it's not consumer-friendly, so I don't see any traction there.

Another option is beef bone broth, which goes through a different manufacturing process and has different functionality. It is 60 - 70% collagen by weight, so brands in direct-to-consumer and practitioner spaces are starting to offer bone-broth powders or high-protein bone broth liquids. They are emphasizing the collagen aspect, playing a bit more on the paleo-friendly version.

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Bovine is still the major driver—it's what consumers identify with most—but I wouldn't be surprised if we see more of other origin stories come into play.

NUTRITIONAL OUTLOOK: Can you talk about Prinova's collagen portfolio?
FORCE: Prinova is the largest importer of marine collagen in the United States. Our product, Pacific Peptides™ is tasteless, odorless, and soluble for straight-fill applications. We're also major players in the bovine collagen space, and we have an exclusive offering in the beef bone-broth space with a product called HydroBeef™. Our partnership dates back 10 years with the largest U.S. manufacturer of bone broth: Essentia. So, Prinova has solid expertise with collagen. We're also a product development house and a powder contract manufacturer. So, we are well-versed in product development and concepting ideas around collagen.