



# Think differently about **Nootropics**

## **Consumer insights to power your next innovation in brain and cognition**

Consumers are redefining what 'nootropic' means.

Insights tell a broader story – there is a growing space for next generation dietary supplements that go beyond cognitive enhancement to unlock the full potential of the brain by expanding into the realms of sleep, mood and stress.

**Ready to find out what consumers really think about nootropics and take your brain boosters to the next level?**

# Executive summary

We live in an 'always-on', fast-paced world. Where we're constantly challenged to be and feel our best.

## This takes brainpower.

While the idea that a supplement could ensure we're always at the top of our game may sound like science fiction – boosting our brain's performance is achievable with science-backed neuro-nutrition.

## Welcome to a new world of possibilities for cognitive enhancement!

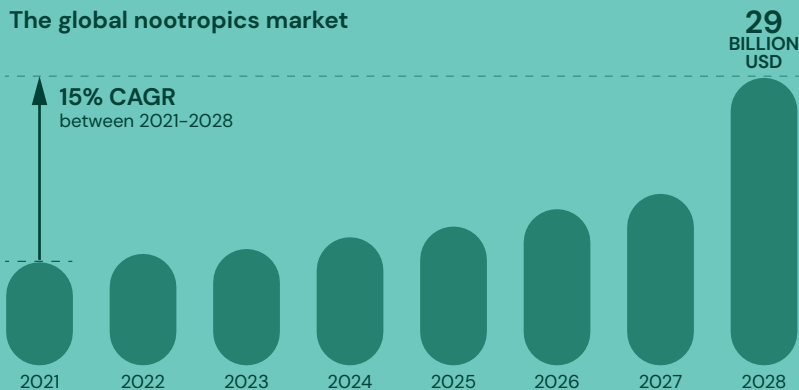
The global nootropics market is estimated to value **USD 29 billion by 2028 (with a 15% CAGR between 2021–2028)**; fueled by rising consumer demand for solutions that will protect, and even enhance, their mental performance over time.<sup>1</sup>

But with growing competition in the market, **how can brands stay ahead of the curve to win the hearts (and minds) of consumers?**

When it comes to true breakthroughs in the health and wellness market, identifying and acting on indicators of change is key. At dsm-firmenich, we deliver people-centric solutions by really understanding consumers' daily challenges by conducting social listening research. To identify the signals that point to innovation opportunities in the nootropics landscape, we investigated the evolving consumer experience and understanding of cognitive performance products – including the 'nootropic' ingredients that are top of mind.

This report illuminates key insights from the voice of the consumer between January and March 2022; revealing the latest trends, whitespace and decision drivers shaping the future of the brainhealth category – plus top tips for transforming insights into action.

The global nootropics market







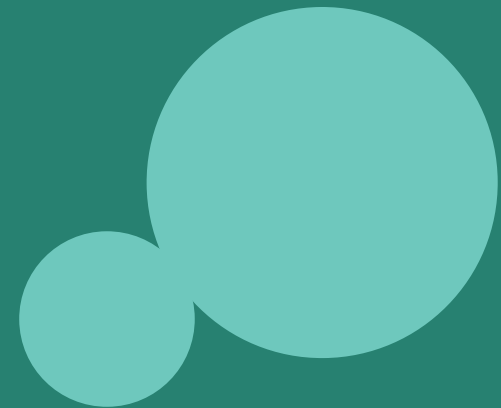
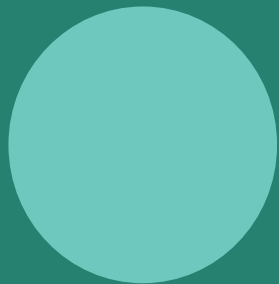
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01

# Demystifying the 'gray matter' surrounding nootropics





# 01

## Demystifying the 'gray matter' surrounding nootropics

Although brain-enhancing supplements have been around for a long time, a lot of unknowns still surround 'nootropic' ingredients in the sphere of brain health. One thing is for certain though. The category holds significant innovation opportunities for dietary supplement brands, powered by growing consumer interest.

### So what exactly are nootropics and how do they support cognitive performance?

The conversation and science behind nootropics is growing

**~17,000**

online news articles cover nootropics<sup>2</sup>

**39,100**

scientific publications (1945 to 2023) focused on nootropics (4% dedicated to natural nootropics – indicating whitespace for research)<sup>3</sup>

**~1,000**

per year (since 2010)<sup>3</sup>



**Elena Gromoboeva**

*Associate Director Global Marketing HNC, dsm-firmenich*

### 1 What are nootropics?

Nootropics – also known as 'smart drugs', 'brain boosters' or 'cognitive enhancers' – are compounds that support improved cognitive function. Although nootropic ingredients have been consumed for centuries to elevate the mind and boost mental stamina, the phrase 'nootropic' is somewhat new to the mainstream supplement market and awareness of the term is growing amongst consumers.

### 2 What are the benefits of nootropics?

Brain-related benefits of nootropics include:

- Optimized cognitive functions – improved alertness, information processing, focus and higher reasoning
- Greater motivation, memory, mental horsepower and productivity
- Mood enhancement

### 3 How do they boost brainpower?

There are many different types of nootropics and they all have unique interactions with the brain – so there is not one simple answer to this question. But some of the ways in which they are thought to boost cognitive function is by stimulating the activity of neurotransmitters in certain regions of the brain, increasing specific brain growth factors, improving blood flow, reducing inflammation and supporting overall neuroprotection pathways

### 4 What is the difference between synthetic and natural nootropics?

Synthetic nootropics are lab-made drugs, typically prescribed by a healthcare provider to overcome cognitive deficits, such as dementia and mild cognitive impairments. They have been mostly studied for their neuroprotection, general cognition and memory benefits.

On the other end of the nootropic spectrum is natural herbal extracts, like bacopa, ginkgo or ginseng. The best nootropics from herbal sources have been shown to improve cognition, combat fatigue, enhance memory and promote overall brain health in healthy adults and even in some individuals where standard medical treatments are insufficient.

## 5 Why should dietary supplement brands care about nootropics?

In a world where we are constantly on-the-go and striving to achieve more, consumers of all ages and backgrounds – from students and athletes to busy parents, military personnel and overworked employees working in high stress environments – are seeking solutions that will give them the edge in their day-to-day lives.

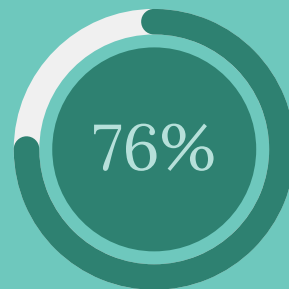
There are an endless number of brain health products currently on the market. Yet few are able to optimize cognitive function while managing stress levels, improving mood and preventing burnout at the same time. The short-term buzz from stimulants, such as caffeine, just doesn't cut it anymore. A rising number of consumers no longer view caffeine as the panacea for brain power and energy; making room for consumer-friendly, caffeine-free alternatives on the market.

With wide-ranging benefits, nootropics – when combined with the right supporting ingredients – have the potential to support multiple consumer needs. Innovation in this category has the capacity to improve cognitive horsepower on demand, while addressing other important mental health and emotional balance demands in a more natural and sustainable way.

## 6 Are there any challenges and opportunities associated with nootropic innovation?

Consumers are asking more from brain health solutions. They want to 'switch on' the brain to give them the mental edge they need, while promoting feelings of calm and control at the same time. This is creating a space for nootropic+ products – i.e. solutions that target areas, like quality sleep, elevated mood and resilience to stress, so that the full benefits of nootropic ingredients can be unlocked.

Key to supporting the growth of this category is continued advancement of science and research. Many nootropic ingredients have been clinically studied. However, outcomes have varied depending on the study design, such as dosage, duration, quality of nootropic and test population. Future scientific investigations are needed to clarify the uncertainties in order to help build the knowledge and trust of consumers.



**of adults say their mental and physical health are equally important<sup>2</sup>**

## The evolving nootropics space

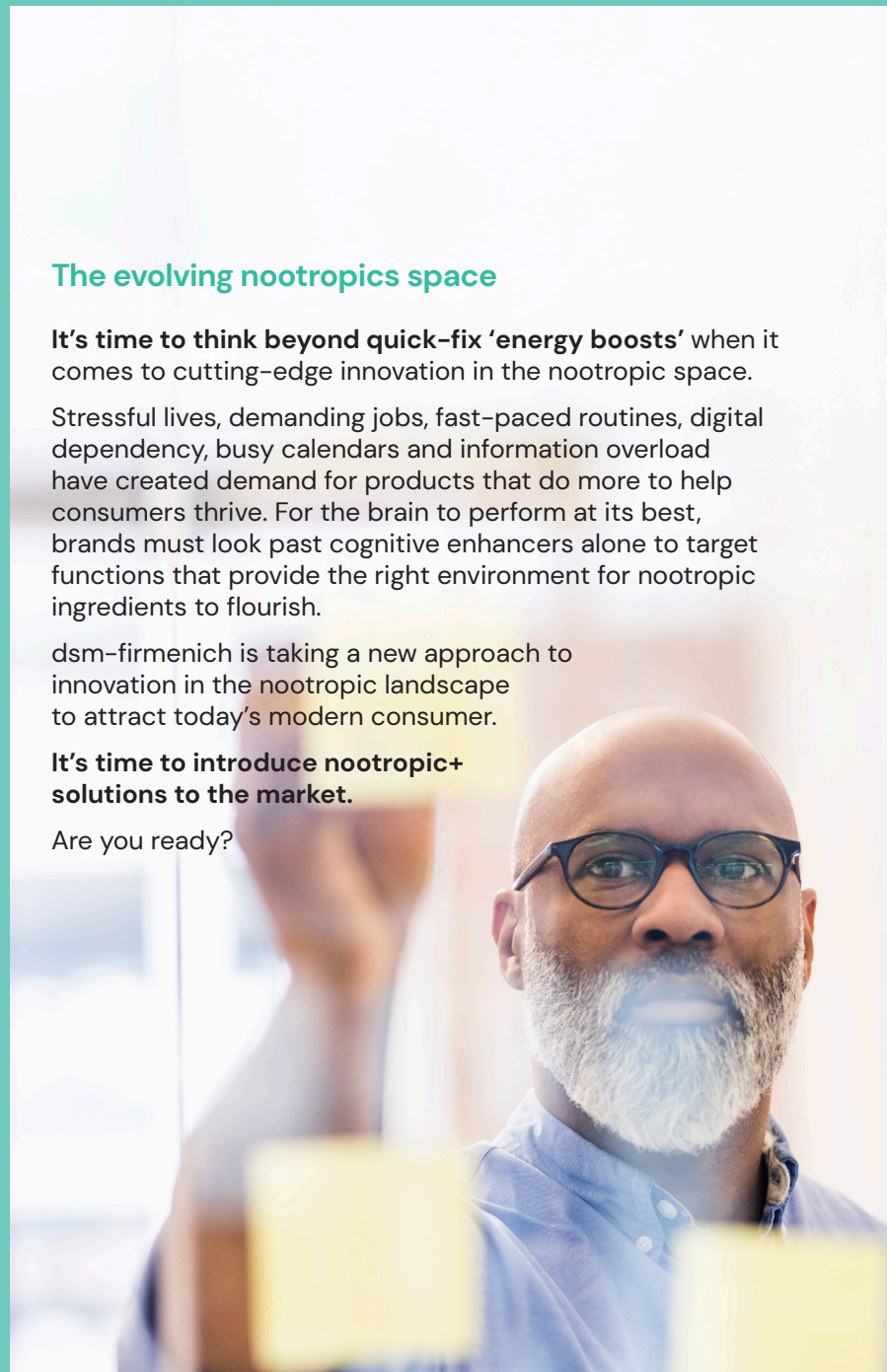
**It's time to think beyond quick-fix 'energy boosts'** when it comes to cutting-edge innovation in the nootropic space.

Stressful lives, demanding jobs, fast-paced routines, digital dependency, busy calendars and information overload have created demand for products that do more to help consumers thrive. For the brain to perform at its best, brands must look past cognitive enhancers alone to target functions that provide the right environment for nootropic ingredients to flourish.

dsm-firmenich is taking a new approach to innovation in the nootropic landscape to attract today's modern consumer.

**It's time to introduce nootropic+ solutions to the market.**

Are you ready?



02

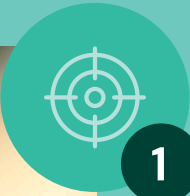
# 6 health benefits of nootropic+ products



# 6 health benefits of nootropic+ products

Successfully connecting with nootropic consumers means getting to know their brain health pain points. Discover the top 6 concerns shaping the online brain and cognition conversations today.<sup>2</sup>





## 1 Focus

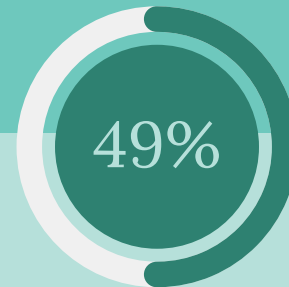
We often think of 'brain fog' as something that affects the older generation only. Or individuals that have not had a quality night's sleep. However, if you combine the 'always-on' social media culture with schoolwork, long work weeks, e-gaming and sports, younger generations are struggling to focus too.

Caffeine is the best-known and most widely consumed stimulant worldwide, scientifically proven to improve concentration, alertness and performance – but only for a short period of time. In addition, consuming too much of it can bring undesirable side effects, like 'the jitters', anxiety or the crash after the 'high'.

This is drawing attention to products that offer sustained mental energy and cognitive horsepower support but without adverse effects. Nootropics can offer enhanced concentration and focus without the ill-effects experienced with caffeine.

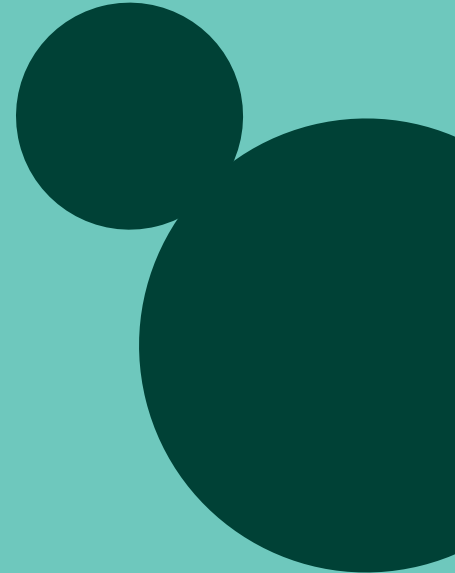


struggle with mental focus<sup>5</sup>



of consumers said they find it hard to concentrate<sup>5</sup>

Improving focus is a top priority for professionals, gamers and athletes<sup>2</sup>







## 2 Productivity

Whether at work or play we all want to perform at our best. But distractions when working from home or struggling to switch off after a stressful day can hamper our ability to be productive. So how can consumers – particularly professionals and students – boost their productivity to perform at the highest level?

Since many factors contribute to how an individual performs – including focus, memory, high energy, stress management and motivation – a multi-ingredient approach is key to addressing this complex element of our daily lives.

Nootropic-based solutions plus ingredients that bring stress relief benefits can help to support better productivity by promoting a relaxed – yet energized – state of mind that's resilient against distractions and emotional disturbances.

Professionals associate productivity with positive impact on work<sup>2</sup>



of students are interested in productivity<sup>2</sup>



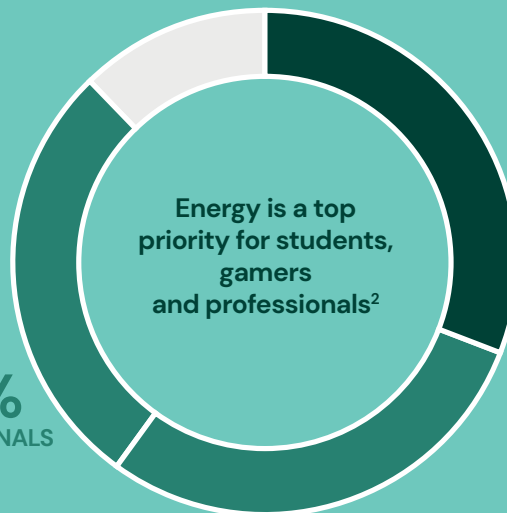


### 3 Feeling energized

Energy products tend to appeal to two separate groups of consumers: athletes who need a quick boost to support physical performance and the more general population who want to feel energized to drive peak cognitive performance and mental stamina throughout the day. However, some people are becoming increasingly skeptical of stimulants like caffeine. For them, coffee isn't the answer to all.

Instead, consumers are turning to healthier alternatives that deliver lasting energy levels in more sustained ways. The focus is on fastacting, long-lasting solutions that don't just mask fatigue but get to the root of the problem.

Nootropics can help to fire consumers up with the mental energy they need to thrive in their day-to-day lives, without the side effects of traditional energy products.



consumers say they regularly feel tired or fatigued<sup>5</sup>



of US consumers are concerned about tiredness or lack of energy<sup>6</sup>

28%  
PROFESSIONALS

29%  
GAMERS

31%  
STUDENTS



## 4 Quality sleep

High quality sleep is critical for optimal cognition throughout the day, general wellbeing and helping us recharge. For example, memory consolidation, coding and storing happens during sleep and sufficient sleep is needed to support focus and learning. Yet, many consumers, young and old, suffer from chronic sleep deprivation linked to modern lifestyles. The impact of disrupted sleep on brain function and emotional wellbeing is concerning.

Poor sleep quality is strongly associated with mental health disorders, like depression, and a long list of chronic health conditions, from Alzheimer's disease to hypertension.<sup>7</sup> It also affects our attention and decision-making capacity.

Nootropic ingredients may not provide sleep benefits. However, including nootropics and natural sleep solutions (that are targeted towards better and more restorative sleep) into routines can help consumers optimize sleep-wake cycles. Ultimately, this will help to enhance brain recovery and overall cognitive performance – unlocking the best possible benefits for daytime brainpower.

Quality sleep is most important to the gamer persona<sup>2</sup>



of the global population doesn't get enough sleep<sup>8</sup>





## 5 Anxiety & stress relief

The conversation around mental health is getting louder – with mentions of the topic growing by 44% between 2021 and 2022 online, in part fueled by the impact of the COVID-19 pandemic.<sup>4</sup> Millennials comment most on the impact of anxiety and depression on work. Meanwhile, the 65+ community are more engaged in conversations about depression, loneliness and isolation. This is motivating people to find healthier ways to cope with mental health issues, like stress and anxiety, and burnouts.

Although nootropics are more focused on enhancing cognitive function, a rising number of consumers want brain solutions that support stress management and positive mood. That's where neuro-adaptogens, like ashwagandha and rhodiola, are entering the discussion. These ingredients demonstrate anti-anxiety and anti-stress properties by supporting a healthy hormone and neurotransmitter response; promoting positive mood and a better 'flow-state' of relaxed productivity.<sup>9</sup> Ultimately, this helps people to feel better *and* enables improved cognitive function.



of all adults in the US will experience an anxiety disorder at some point in their lives<sup>10</sup>



consumers taking proactive steps to improve their mental and cognitive health<sup>11</sup>

Student personas are most interested in products for anxiety and stress<sup>2</sup>

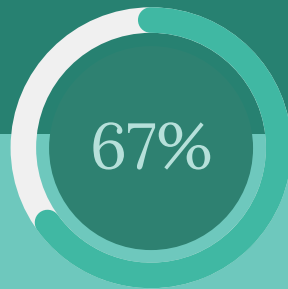




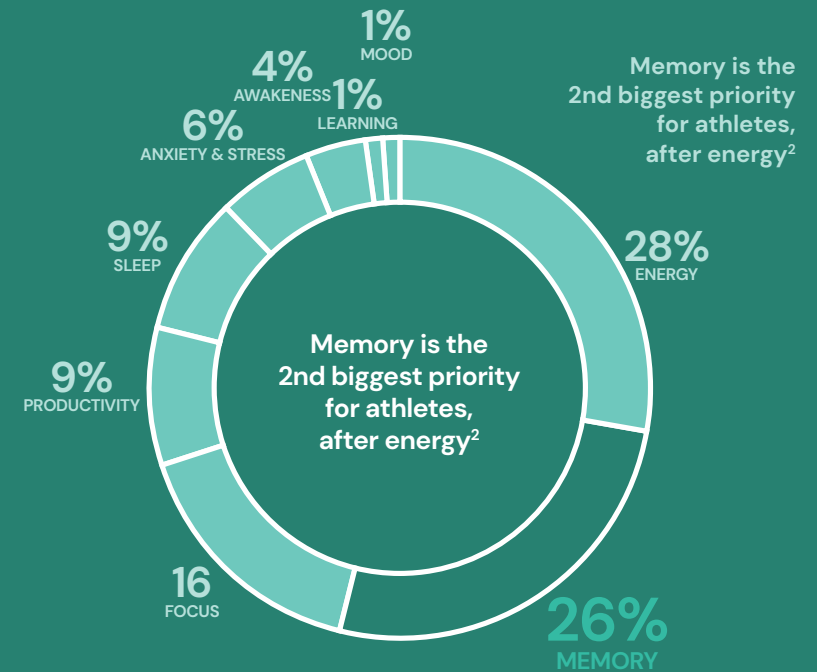
## 6 Memory

A healthy memory function is fundamental for navigating everyday life – from remembering where our keys are to the critical financial data for your next board meeting (and everything in between). Some nootropics, and other ingredients involved in brain function, such as vitamin Bs and omega-3s, are well documented memory boosters that can enhance processes linked to memory.<sup>12</sup>

Thus, whilst memory-supporting products remain popular with the older population to help slow memory decline, 'memory pills' are appealing to younger demographics who are increasingly dealing with information overload and stress in their personal and professional lives.



67%  
of consumers in US  
AND 59% in UK ARE  
concerned about brain  
and memory health<sup>13</sup>



03

What's top of mind  
for consumers?

# What's top of mind for consumers?

dsm-firmenich's insights and marketing expert services explored social media conversations to identify what today's consumers understand about neuro-enhancing solutions and which ingredients (nootropics and more) they most strongly associate with cognitive enhancement and mental wellbeing.

Read on to illuminate the most discussed ingredients in the nootropic-related online conversations and unlock new opportunities in brain-based product development.

## 1 CBD are nootropics?

CBD – or cannabidiol – is a common cannabinoid supported by a fast-developing body of science and growing consumer acceptance. Although technically not a nootropic, CBD is increasingly perceived as a solution for mental and emotional wellbeing and progressively becoming part of online conversations related to brain performance.<sup>2</sup>

+ 35% of online conversations featured CBD

+ Perceived brain benefits:

- Decreased anxiety & stress\*
- Chronic pain management
- Better-quality sleep

+ 85% of CBD conversations mentioned gummies as a format



## 2 Vitamin B

The B vitamins are a class of water-soluble vitamins that play important roles in cell metabolism and brain function. Vitamin B12 specifically has entered the cognitive enhancement conversation, as it is essential for the synthesis of neurotransmitters that affect alertness, cognition, memory and mood; maintenance of the myelin sheaths that protect neurons; and red blood cell formation.<sup>2</sup>

+ Perceived brain benefits:



## 3 Omega-3 fatty acids

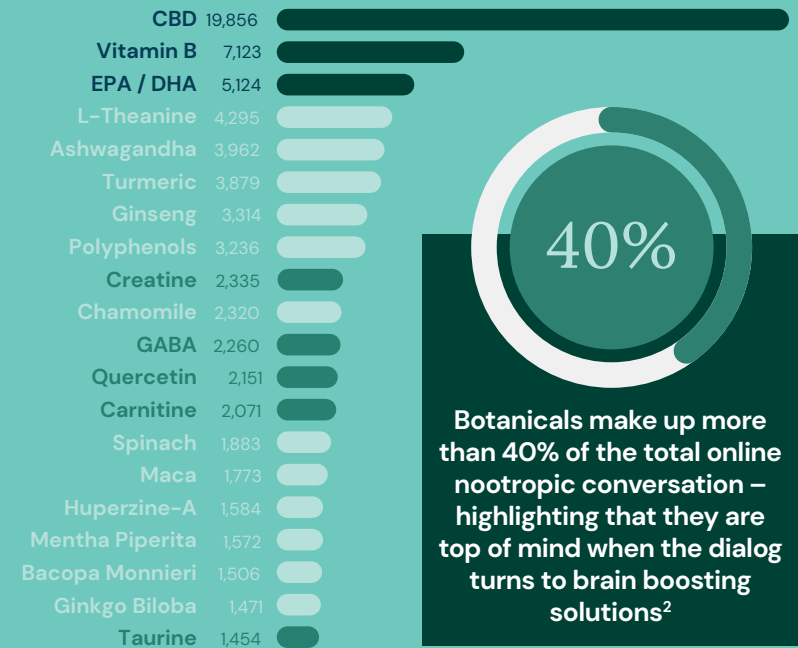
Omega-3 fatty acids – especially docosahexaenoic acid (DHA) – are well-recognized to both support brain development in early life and maintain healthy cognitive function as we get older. Getting sufficient omega-3 nutrition is therefore important to brain health at all ages.

Although technically not a nootropic, the fact that consumers are making a strong connection between omega-3s and brain performance demonstrates the changing perceptions of consumers and evolution of the conversations being held within the nootropics arena.<sup>2</sup>

+ Perceived brain benefits:

- Better-quality sleep\*
- Improved brain function
- General brain health
- Brain development

Top 20 ingredients discussed online in nootropic-related discussion, outside of stimulants such as caffeine<sup>2</sup>



Botanicals make up more than 40% of the total online nootropic conversation – highlighting that they are top of mind when the dialog turns to brain boosting solutions<sup>2</sup>

\*Most discussed benefit within ingredient category





04

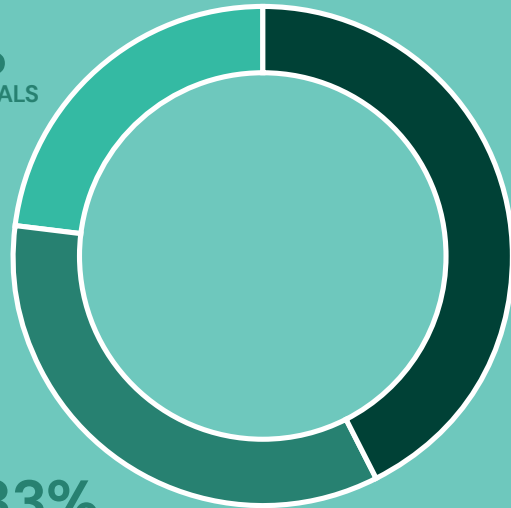
# Understanding the nootropic+ consumer

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Keeping up with the nootropic – and wider mental enhancement – conversation is key to tuning into what's trending.

There is a captive audience for brain health solutions that support the fast-paced, 'always-on' lifestyle of today's modern consumer. But gaining buyers' attention is reliant on fully understanding their needs, what resonates, the language they use and preferences when it comes to ingredients and product formats.

22%  
PROFESSIONALS



41%  
ATHLETES

When it comes to brain-supporting ingredients, CBD is the most discussed amongst professionals, athletes and e-gamers<sup>2</sup>

33%  
GAMERS

Among online discussion attributable to a tracked persona

90%

of people talking about nootropics are professionals and athletes<sup>2</sup>



# Professionals

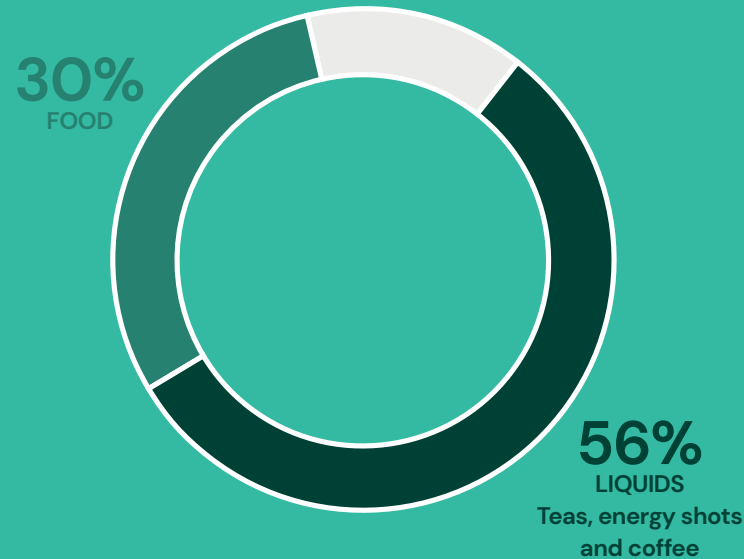
Whether working in healthcare, the military, as a first responder or in an office, there is a growing interest in brain health supplements that support all-day job performance, keeping focus and increasing productivity.

Combining pepper and turmeric can help enhance memory.

## Top cognitive benefits<sup>2</sup>

<b>20%</b> energy	<b>15%</b> memory
<b>13%</b> focus	<b>12%</b> productivity
<b>40%</b> other	

## Format preferences<sup>2</sup>



## Most discussed ingredients<sup>2</sup>

<b>17%</b> ginseng	<b>22%</b> CBD
<b>9%</b> ashwagandha	<b>14%</b> turmeric



Energy is a top priority for professionals<sup>2</sup>



Took Huperzine A for the first time today and I can feel the difference. I've been more focused, had more energy and felt my brain working on a higher level.

 Speak to one of our experts and find out more. Explore our concepts.

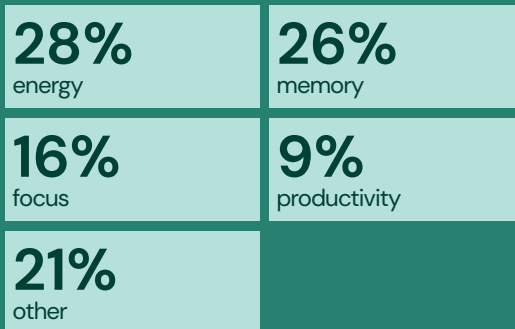


# Athletes

Athletes are constantly looking for ways to gain a competitive edge. The link between mental and physical performance is nothing new.

Enhanced mental acuteness, faster processing times increased focus helps competitors optimize reaction times and stay on top of their game. One way to achieve this is via pre-workout formulations with added nootropics, providing robust and long-lasting energy, motivation and concentration to maximize training. But it's not just elite athletes driving the discussion in this category, nootropics are gaining traction in the broader performance nutrition market and active-lifestyle category, which includes regular gym-goers.

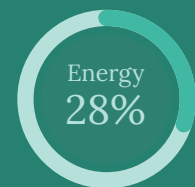
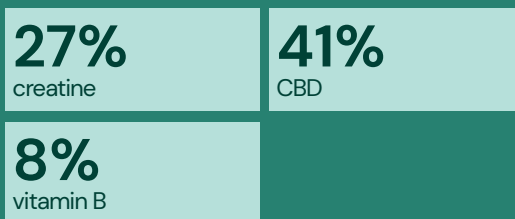
## Top cognitive benefits<sup>2</sup>



## Format preferences<sup>2</sup>



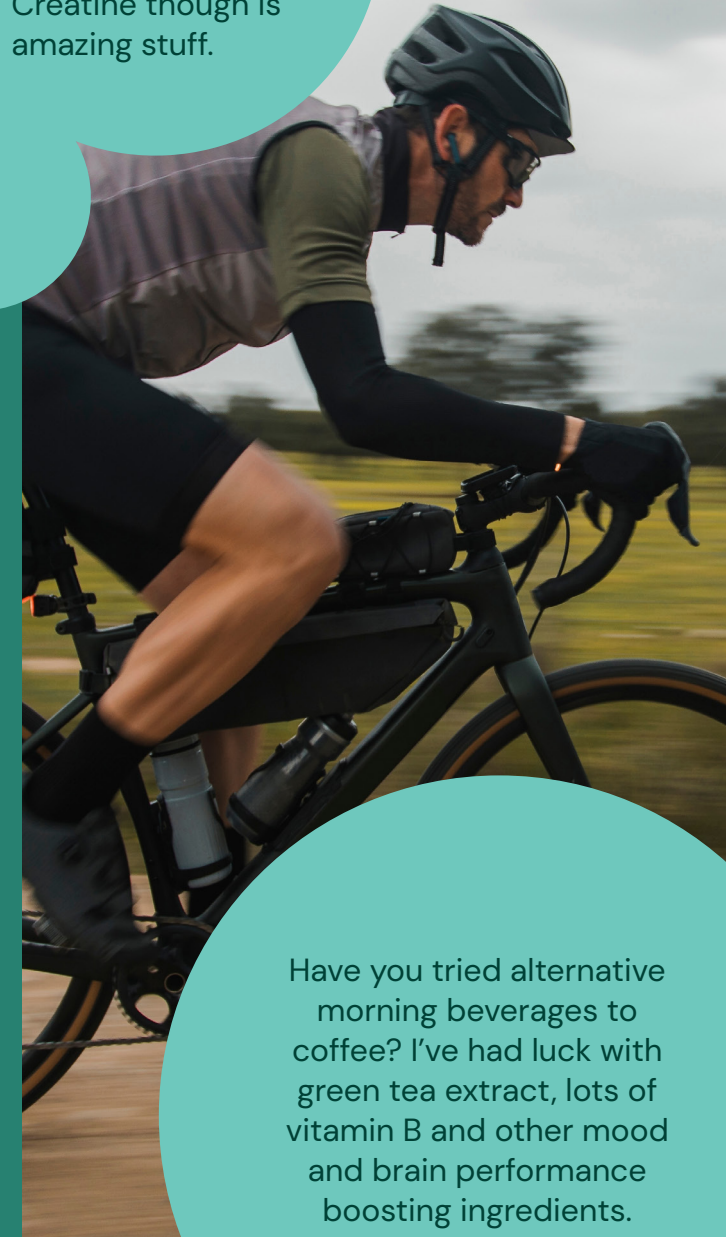
## Most discussed ingredients<sup>2</sup>



Energy and Memory are the biggest health priorities for athletes<sup>2</sup>



For me, coffee is an added energy boost, but I can't say many benefits beyond that. Creatine though is amazing stuff.



Have you tried alternative morning beverages to coffee? I've had luck with green tea extract, lots of vitamin B and other mood and brain performance boosting ingredients.

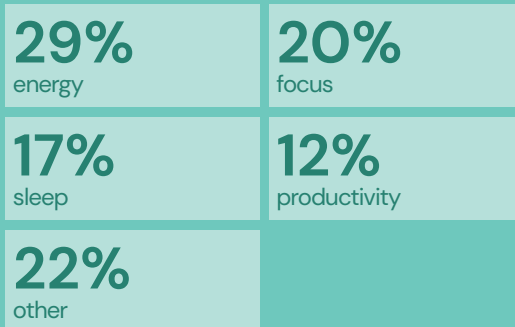
[▶](#) Speak to one of our experts and find out more. Explore our concepts.

# e-Gamers

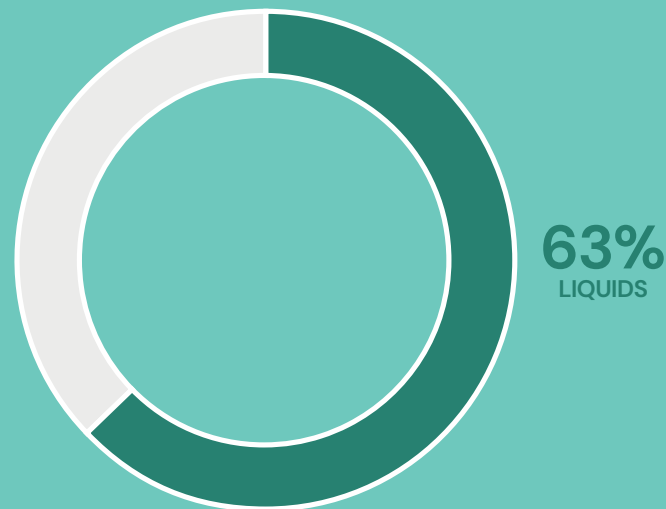
For all gamers (but especially professional esports participants), it is critical to maintain alertness and focus over a long period of gameplay – where fast reactions are the difference between winning and losing.

Enhanced mental acuteness, faster processing times increased focus helps competitors optimize reaction times and stay on top of their game. One way to achieve this is via pre-workout formulations with added nootropics, providing robust and long-lasting energy, motivation and concentration to maximize training. But it's not just elite athletes driving the discussion in this category, nootropics are gaining traction in the broader performance nutrition market and active-lifestyle category, which includes regular gym-goers.

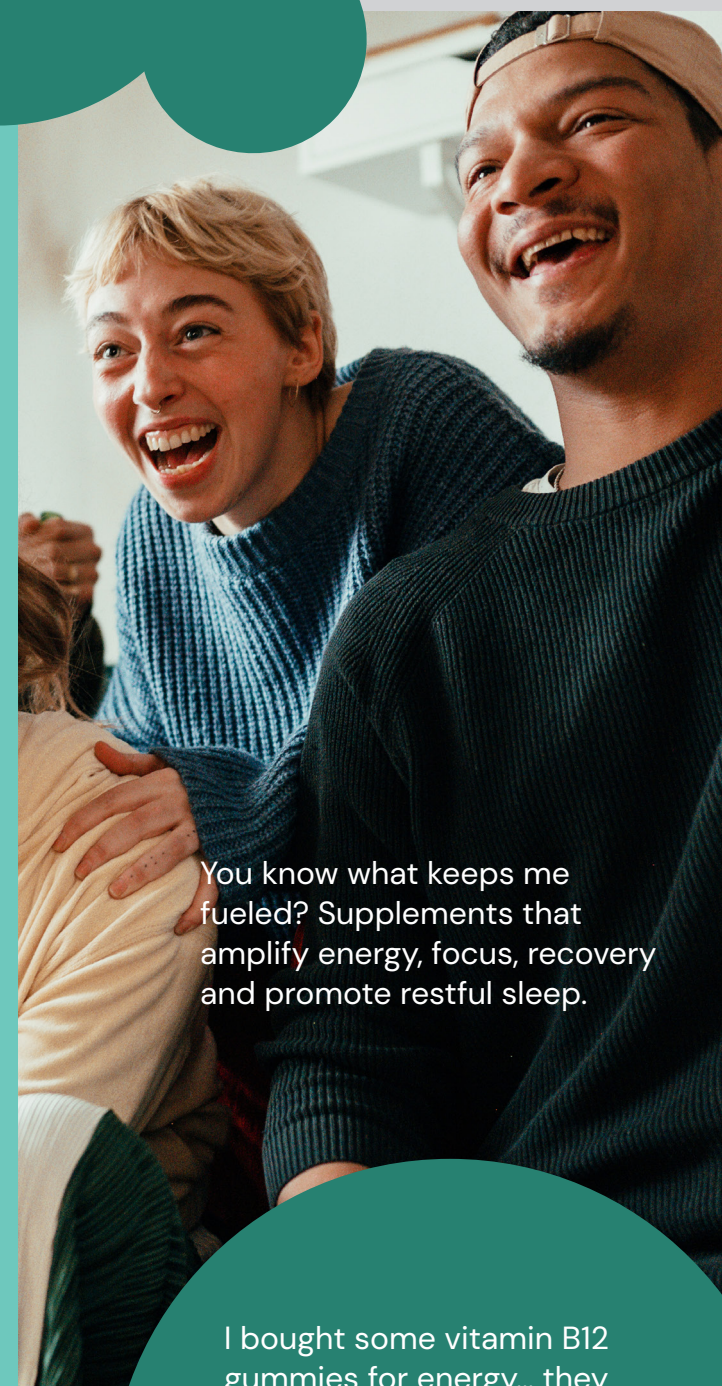
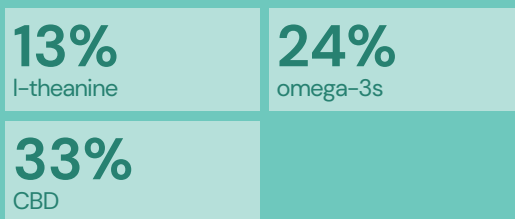
## Top cognitive benefits<sup>2</sup>



## Format preferences<sup>2</sup>



## Most discussed ingredients<sup>2</sup>



You know what keeps me fueled? Supplements that amplify energy, focus, recovery and promote restful sleep.

I bought some vitamin B12 gummies for energy... they definitely do the trick."

[▶](#) Speak to one of our experts and find out more. Explore our concepts.

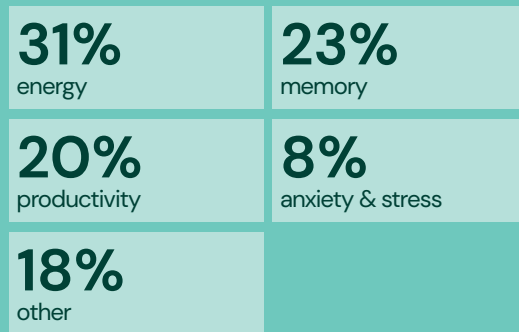


# Students

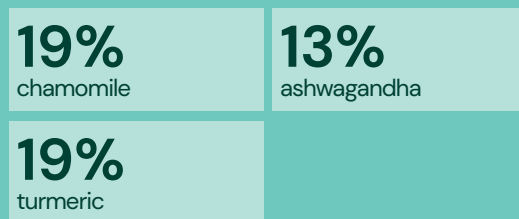
Students experience demanding workloads and stressful exam periods which require optimal memory skills, enhanced learning ability and peak productivity.

While they recognize that stimulants, like caffeine, are useful when in need of an instant boost, they increasingly consider them unsustainable. As a result, high achievers are increasingly turning to natural nootropic ingredients to help them continuously excel in their studies.

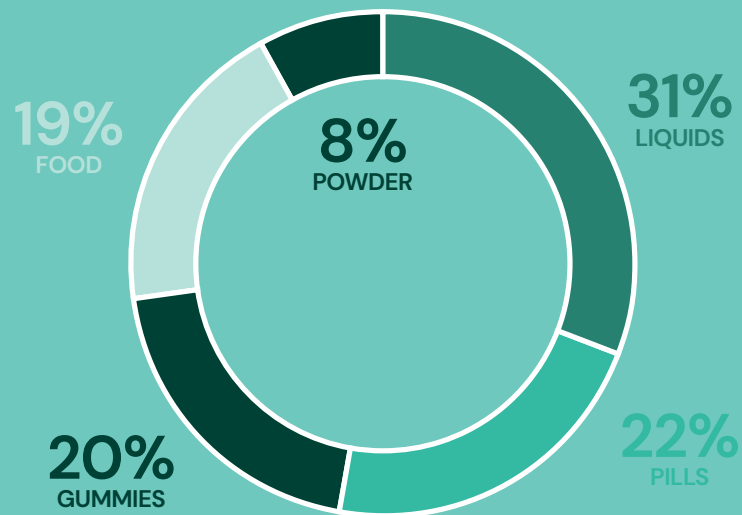
## Top cognitive benefits<sup>2</sup>



## Most discussed ingredients<sup>2</sup>



## Product formats popular in the nootropics market<sup>2</sup>



## Key ingredients<sup>2</sup>



Green tea is surprisingly better than coffee for cognitive performance due to the L-theanine holding the caffeine anxiety effects back.



Ashwagandha and L-theanine all help with mental clarity and stress.

 Speak to one of our experts and find out more. Explore our concepts.





05

# 4 top tips for innovation

# 4 top tips for innovation

The potential for nootropic+ innovation is huge considering the diverse ingredients available, the multiple ways in which they can benefit the brain and the range of needs from different consumer personas seeking brain-supporting solutions.

To help you on your way to creating purpose-led, consumer-driven cognitive enhancing products, here are our four top tips for getting started in the nootropics arena.

## 1 Focus on science-backed ingredients

There is an opportunity to leverage trending nootropic ingredients to raise the shelf appeal of your products to savvy consumers. Remember though – always choose science-backed, high-quality ingredients that consumers can trust.

**Hint: Don't forget natural adaptogenic ingredients, such as Ashwaganda. Although not nootropics as such, they are perceived by consumers to have important brain benefits and the research behind both is promising. The same can be said for vitamin Bs and omega-3s. Although not deemed conventional nootropics, they are increasingly part of the conversation due to robust science, high awareness, trust and regulatory approved brain related claims in key markets.**

## 2 Create the right ingredient stacks

How about taking your new product development further still by adopting a broader approach to innovation? The best way to appeal to different consumer personas is to customize your formulation to their health needs and preferences. This is possible by creating unique 'nootropic stacks' that are fine-tuned to support specific cognitive functions. To achieve this, formulators can combine and balance multiple ingredients with distinct cognition enhancement and mental wellbeing benefits.

## 3 Push boundaries in format development

To deliver nootropic ingredients in the best possible way and attract busy consumers, format innovation is key but a largely untapped opportunity in this category. Although there is still space for pills and capsules, shoppers are getting tired of traditional delivery systems; seeking more enjoyable ways to fuel their brains and empower their minds. Trending formats include gummies, strips, gels and functional foods and beverages due to their convenient, on-the-go delivery of ingredients.

**Top tip: Don't be afraid to challenge the status quo and experiment with different product formats to stand out from the sea of supplements!**

## 4 Make education a priority

Although brain boosting ingredients are bursting onto the brain health scene, many consumers have difficulties recognizing most ingredients and what specific combinations will meet their unique needs. This lack of knowledge is creating a barrier to reaching and attracting many consumers. To broaden the market, there is an opportunity for brands to educate consumers about the best ways they can support their brain health and cognitive performance via the right neuro-nutrition.

### Food for thought

Help consumers balance mental alertness and feelings of calm by combining nootropics with ingredients like neuro-adaptogens or botanicals. This way of thinking could attract the attention of a rising number of consumers who want an all-round brain powering solution.

# Unlock the brain's full potential with dsm-firmenich

**We're with you, from concept to consumer.**

dsm-firmenich can help you transform consumer insights into cutting-edge brain health solutions with proven health benefits. This takes more than ingredients. It takes a partner.

We're at the forefront of brain health and cognition enhancement advancements and can help you access wider market opportunities, faster. When you partner with us, you'll benefit from our high-quality ingredient portfolio, insider knowledge of trends, deep understanding of brain science, regulatory and marketing experience and formulation expertise.

Our customized solutions and unmatched end-to-end capabilities support you from concept to consumer; helping you launch your next stand-out solution with purpose, speed and confidence. With a broad portfolio of propriety products such as lipids and vitamins combined with nootropics as a Premix or Marketready solution, we can simplify your supply chain, fast track your innovation and together push new boundaries in the brain health arena.

**Get inspired!**

Explore our market-ready solutions and premix solutions to power your brain performance products.





# References

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# We're committed to smarter brain health solutions...

Did you know that we've partnered with Indena to pioneer a new "Age of Nature" through market-inspired botanical solutions for human health? The co-innovation agreement will see us develop science-backed, next-generation botanical solutions for brain health and generate new scientific evidence for combinations of essential nutrients and botanicals.

**Partner with dsm-firmenich to bring the next generation of brain health solutions to life.**

**Partner with dsm-firmenich**

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