



Redefinition & Emotional Anchoring™

How Life Transitions Are Shaping
the New Identity of Wellness



Introduction

From CHEMI Nutra and Univar Solutions’ 2025 consumer survey, 71% of people navigating major life transitions told us wellness is less about peak performance—and more about feeling like themselves again. This shift is the foundation of Emotional Anchoring™—a category we’re defining to meet the emotional as well as mental needs of consumers in transformation.

In a wellness industry still dominated by performance metrics and bounce-back promises, a quieter, more profound shift is underway. Consumers aren’t chasing their “best selves” anymore. They’re redefining strength on their own terms. Whether recovering from injury, adjusting to GLP-1 medication, moving through postpartum, or navigating age-related change, they are seeking something deeper: emotional anchoring.

To understand this moment, we surveyed 548 U.S. consumers in transition. These weren’t just high performers or gym-goers. They were people in flux—redefining who they are physically, emotionally, and mentally. What they shared was clear: wellness isn’t just about what they do, but how they want to feel during change.

The Emerging Wellness Context

Today's wellness consumer is navigating more than workouts or diets—they're navigating identity shifts. A new generation of users is not just seeking energy, focus, or recovery, but a felt sense of self through change. Whether the catalyst is weight loss, aging, postpartum, or an unexpected injury, people are searching for products that bring clarity, calm, and continuity.

This shift isn't abstract—it's showing up in clinical data, product trends, and cultural storytelling. Emotional health and identity preservation are quickly becoming non-negotiables in the wellness journey.

The drive for product innovation is equally accelerating. A 2022 report by McKinsey projected that by 2026¹, over 50% of global revenues would come from products and services that didn't exist just a few years prior. This aligns with 2024 commentary from the Nutrition Business Journal², which highlighted mood and mental wellness as the fastest-growing condition area in the supplement industry, tracking to outpace nearly all others in the years ahead.

"The pressure to return to your old self—whether after childbirth, illness, or weight loss—is outdated. Today's wellness is about integration, not recovery."

— THE ATLANTIC, 2023

From Aging to Illness to Recovery, Redefinition is Everywhere

Consider postpartum health, where emotional changes are the rule rather than the exception—and the pressure to "bounce back" only intensifies the transition.

1 in 5

women in the US experience a mental health condition during or after pregnancy³



85%

of women report mood changes in the days that follow childbirth⁴



These are not niche experiences—they're becoming a common emotional backdrop to physical change.

Emotional Anchoring Is the New Need State

Consumers are no longer content with quick boosts or sharp focus. They're asking for something grounding—something that keeps them emotionally steady through change.

Mood, motivation, and emotional identity have become mainstream wellness priorities. Anchoring is no longer optional—it's expected.

70%

of Gen Z users report noticing a positive emotional shift when using mental health supplements⁷

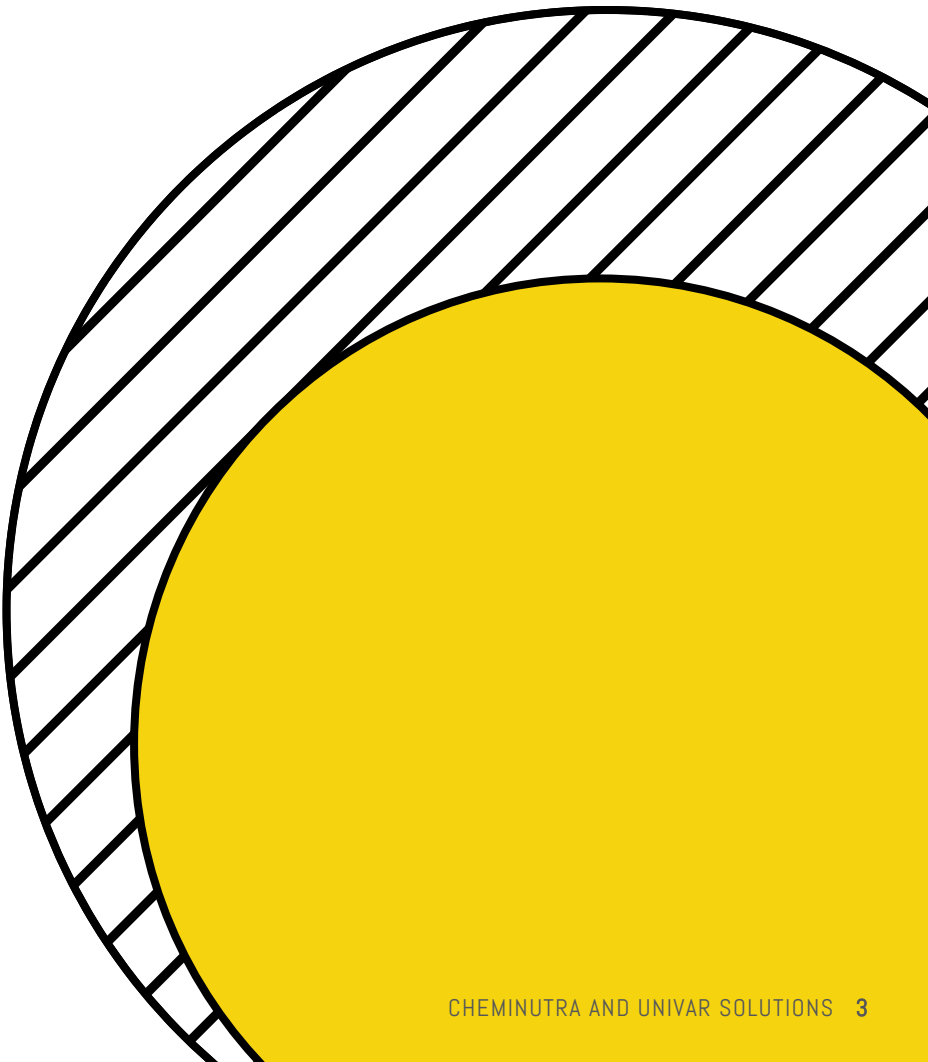
MENTAL WELL-BEING SUPPLEMENTS MARKET IS SURGING

\$11.5B

global market revenue for mental well-being supplements in 2025v

\$17.4B

projected revenue for mental well being supplements by 2030⁶





MOST CONSUMERS
IN TRANSITION
FEEL SUPPLEMENTS
AREN'T MADE
FOR THEM.

Supplements Can Bridge the Gap Between Medication and Mindset

Especially in cases of rapid transformation—like GLP-1-supported weight loss or postpartum recovery—there’s often a lag between physical progress and emotional integration. People report feeling unfamiliar with themselves, even as they meet their external goals.

This isn’t hypothetical. Media, practitioners, and

patients alike are describing a pattern of emotional detachment and identity erosion during these transitions.

Supplements can do more than fill nutritional gaps—they can bridge the emotional ones, serving as quiet stabilizers between the person you were and the person you’re becoming.

Key Findings
from the Survey

Through our proprietary survey, we sought to understand how people in transition perceive wellness today—and what they truly want from the supplements that claim to support them.

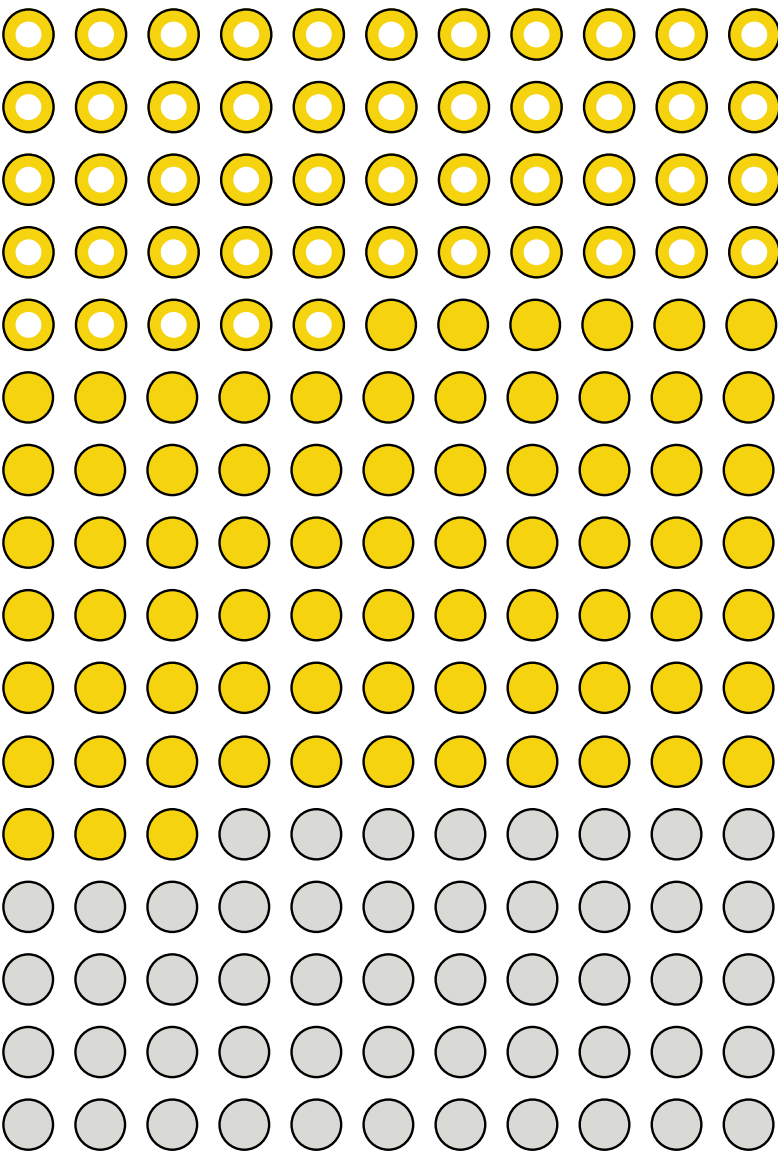
Redefinition Is Emerging as
a New Wellness Driver

Nearly 3 in 4 respondents (71%) were currently experiencing a major life transition. Yet only 28% felt today’s supplements were designed for people like them.

This disconnect signals a shift: health is no longer about reclaiming a previous version of oneself—it’s about anchoring into who you’re becoming. Consumers are seeking tools that support emotional grounding as much as physical progress.

71% ●
of respondents currently experiencing a major life transition.

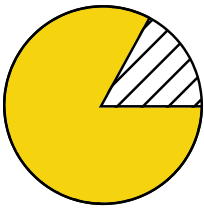
28% ●
of respondents felt supplements were designed for people like them.



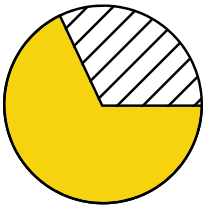
Emotional Anchoring™
Is the Missing Middle of
the Market

Traditional supplements speak to strength, stamina, or sleep. Few acknowledge the emotional reality of transformation. That’s the gap where Emotional Anchoring™ belongs.

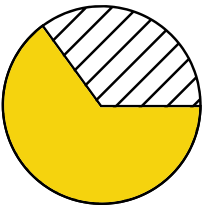
MOST CONSUMERS WANT MORE THAN FUNCTIONAL SUPPORT — THEY WANT EMOTIONAL GROUNDING



83%
of respondents want supplements that help restore their sense of self.



68%
reported that staying motivated after a major life shift is significantly harder.



65%
experienced periods of emotional low without knowing what kind of support would help.

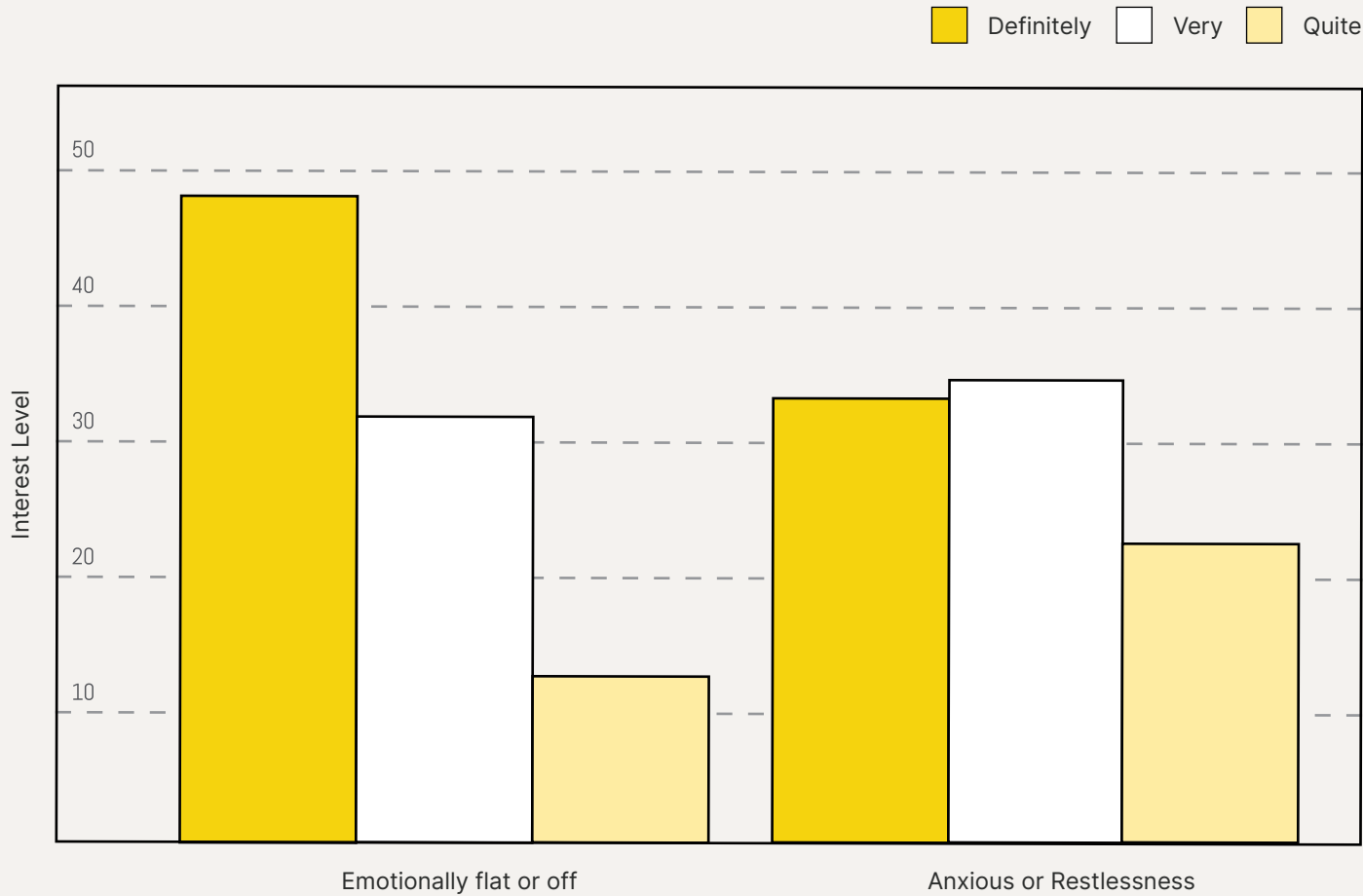
“The next wave of health products will serve not just the body, but the inner world—the emotions, identities, and rhythms we live by.”

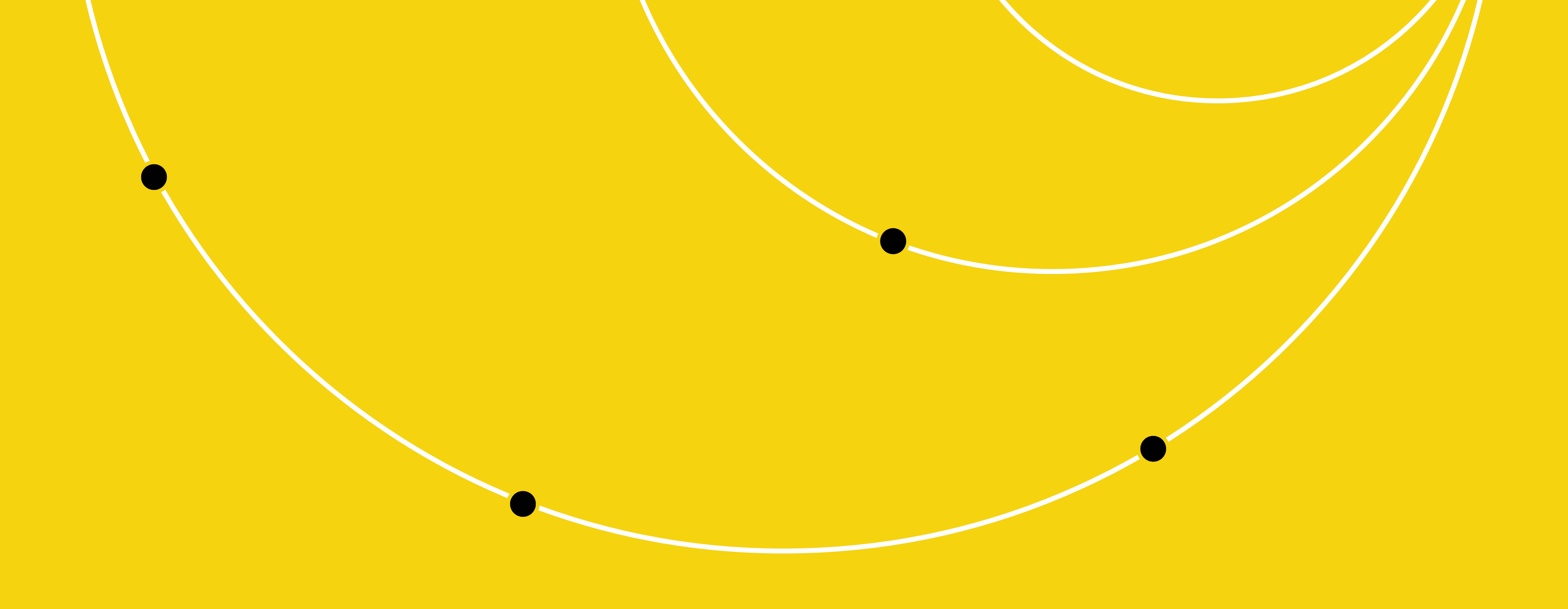
— WELL+GOOD, 2024

Interest Peaks
When Emotional
Anchoring Feels Urgent

Survey data shows that interest in a supplement supporting calm, grounded, and focused motivation increases significantly during periods of emotional flatness, anxiety, or restlessness. Those who already feel mentally focused almost every day are most likely to say they are “definitely interested,” while those in more variable or low-focus states express strong interest at “very” or “quite” levels.

MOST CONSUMERS WANT MORE THAN FUNCTIONAL SUPPORT — THEY WANT EMOTIONAL GROUNDING





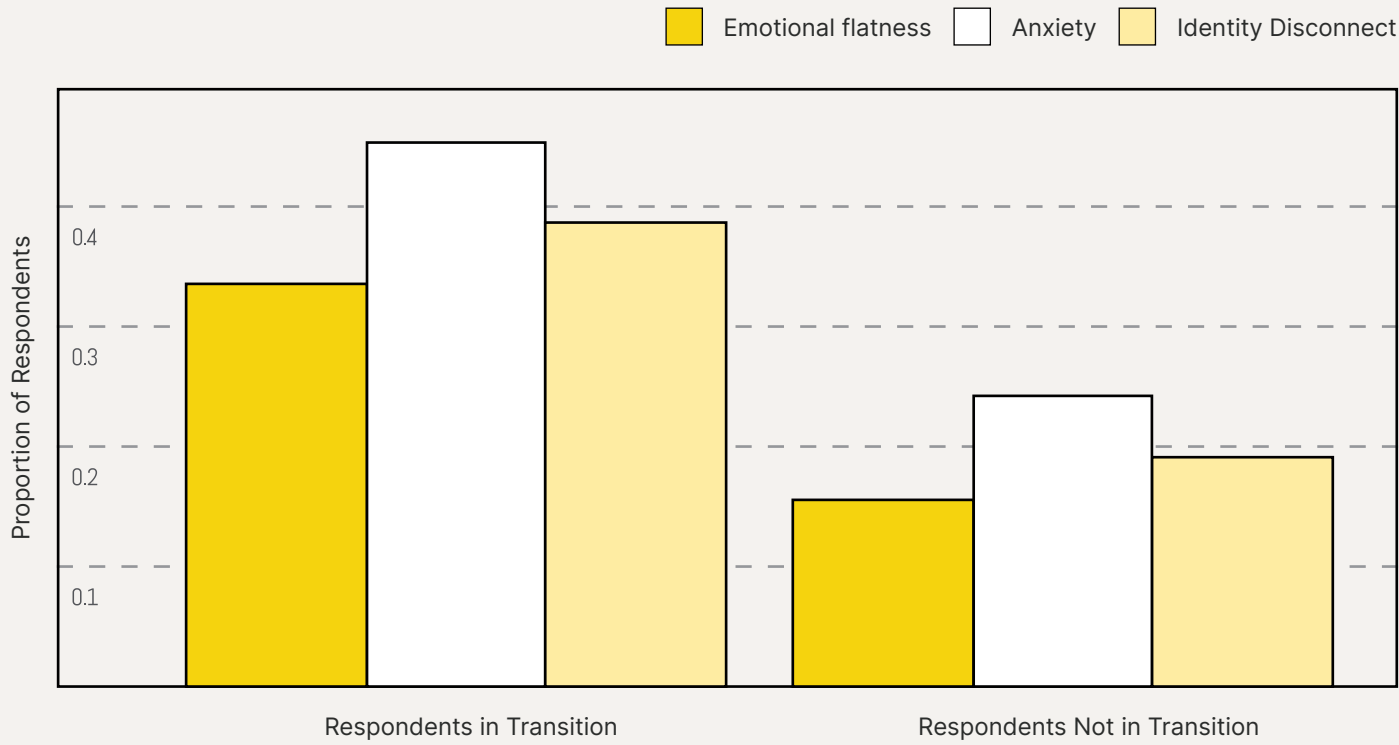
The Chemistry of Feeling Whole™

Where Science Meets Emotion

Our work begins with understanding people: consumer insight is more than function—it's about how we truly feel. We've spent years studying the neurotransmitter connection, refining clinically proven ingredients, and shaping them into solutions that don't just perform on paper, but resonate in daily life.

This is where science meets emotion—where molecules become moments, and wellness becomes whole.

LIFE TRANSITIONS ARE COMMON AND EMOTIONALLY DISRUPTIVE



New Personas Are Emerging with Distinct Needs

GLP-1 users, postpartum individuals, and midlife consumers are navigating a disconnect between physical change and emotional identity. Each needs continuity, grounding, and emotional scaffolding.

GLP-1 users often feel a loss of joy in rituals like eating or socializing. Postpartum individuals report emotional flatness or anxiety despite physical recovery. Midlife consumers face a layered redefinition of strength, purpose, and self.

These are not niche audiences—they’re growing populations with unmet needs.

“GLP-1s are incredibly effective—but they leave behind a need for reconnection. There’s a gap between what’s changing and what still needs support.”

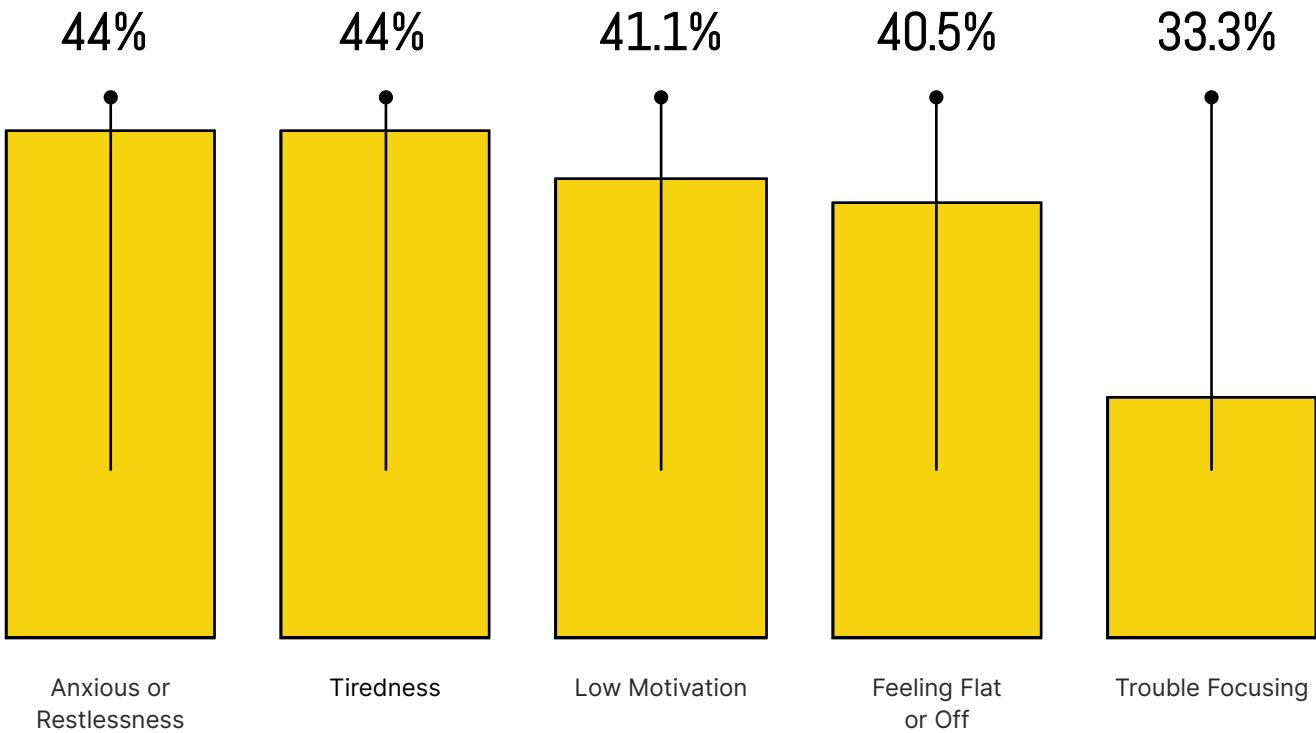
— CLEVELAND CLINIC, 2023

“

AMERICANS ARE NO LONGER LOOKING FOR THE NEXT ENERGY BOOST—THEY’RE LOOKING FOR EMOTIONAL STEADINESS.

— MCKINSEY & CO, 2023

TOP EMOTIONAL CHALLENGES IN TRANSITION



Emotional Benefits Now Lead Functional Ones

When asked what support they want most from supplements, consumers overwhelmingly chose emotional benefits over functional ones.

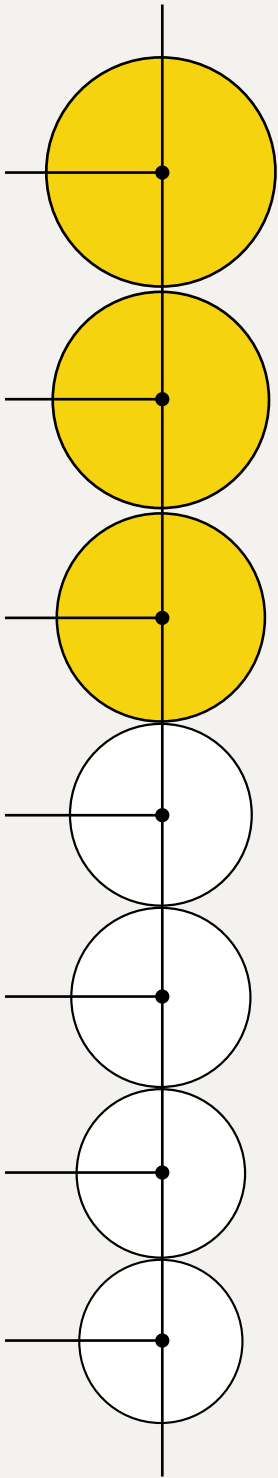
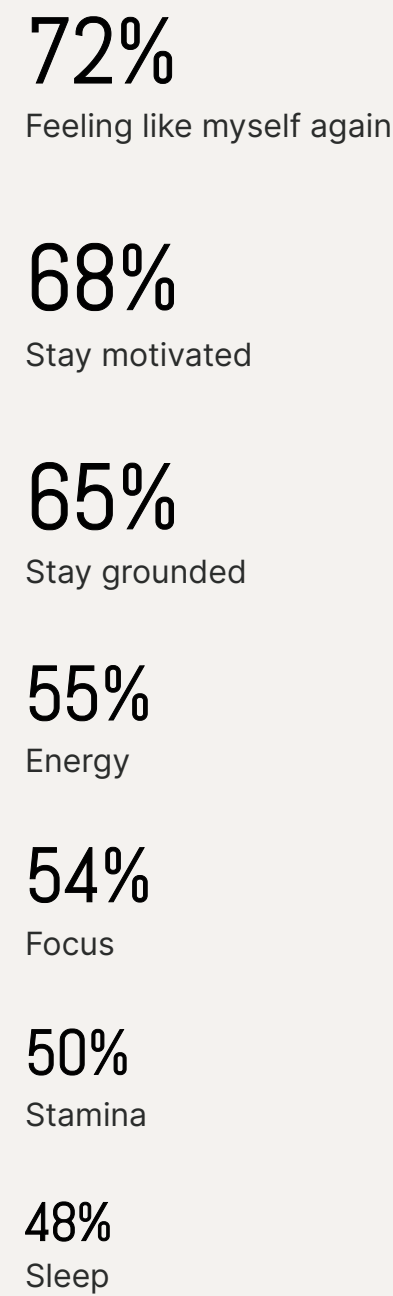
The top three were:

- To feel like myself again
- To stay motivated
- To stay emotionally grounded

While functional benefits like energy, focus, and stamina still matter, they're now seen as tools in service of a deeper goal: feeling whole while doing more.

EMOTIONAL PRIORITIES OUTRANK FUNCTIONAL GOALS IN SUPPLEMENTAL APPEAL

Emotional Priorities Functional Priorities



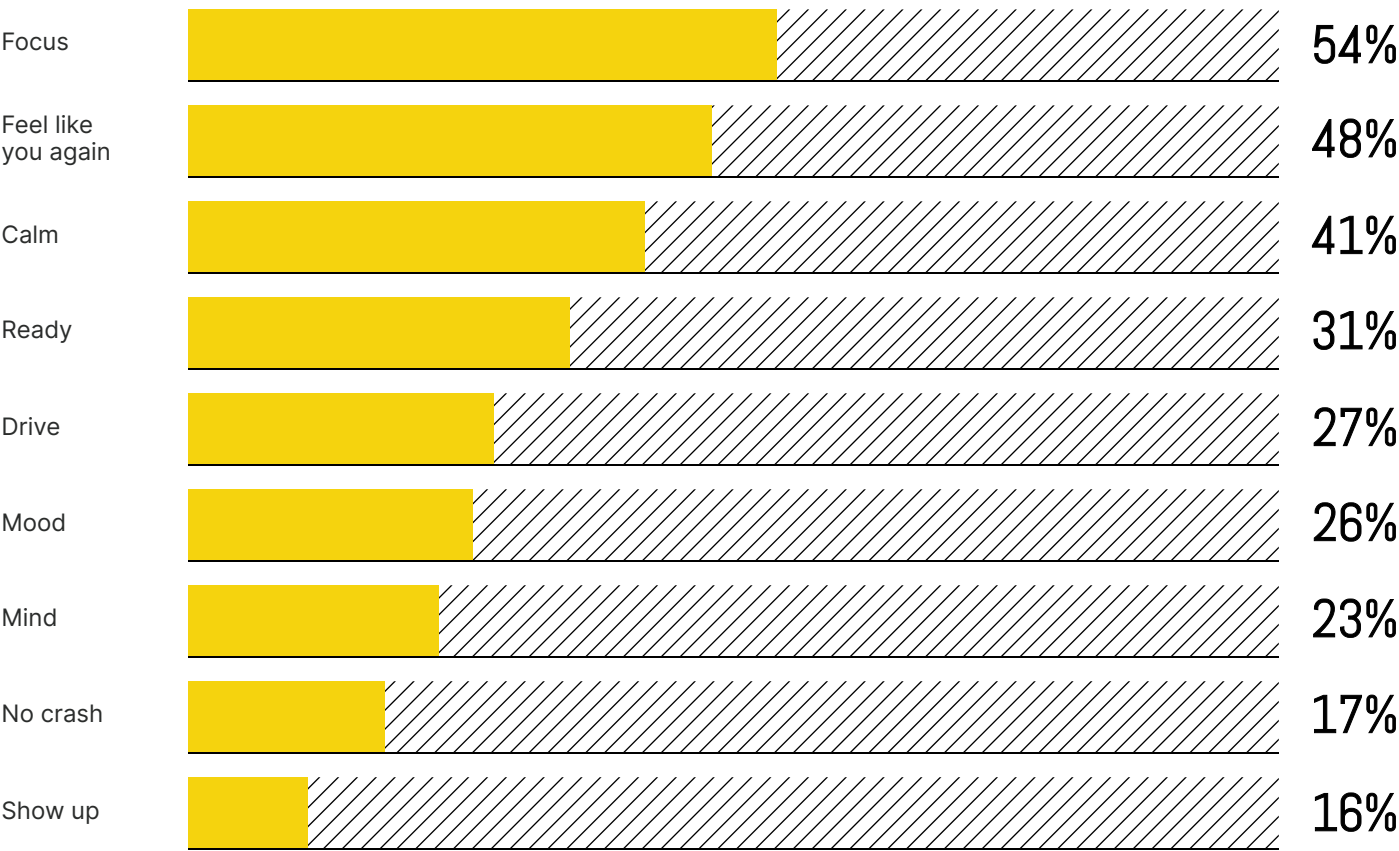
The Language of the Category Isn't Resonating

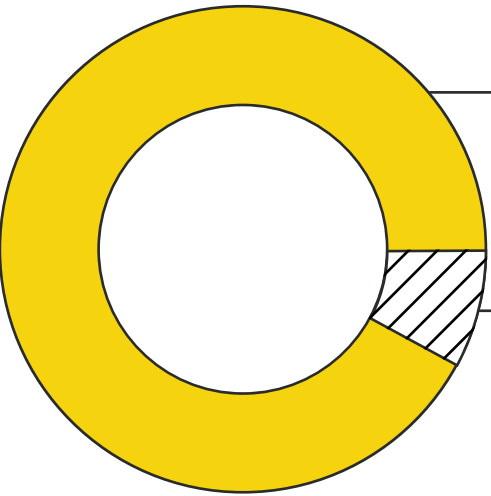
Our survey shows that consumers still want familiar benefits like focus, but the language around them needs to evolve. Focus tested highest (54%), alongside emotionally grounding phrases like Feel like you again (48%) and Calm (41%). By contrast, more abstract or performance-framed phrases scored much lower — underscoring that today's wellness consumers don't want to "bounce back" or chase peak performance. They want benefits that help them feel anchored, steady, and themselves again.

"There's a psychological cost to rapid weight loss—particularly when appetite is blunted. Users often describe feeling disconnected from joy, from social rituals, even from themselves."

— NEW YORK TIMES, 2024

APPEAL RATINGS FOR RESTED PHRASES





92%
Appealing

8%
Not Appealing

The Opportunity for Formulators and Brands

A shift this personal requires blending science with identity. Brands that deliver emotional anchoring alongside performance will define the next generation of wellness—not through aggressive claims, but by helping people feel like themselves again.

The Ingredient Toolkit for Emotional Anchoring™

Life transitions demand more than strength — they require connection, calm, and continuity. Our ingredient platform is built to anchor all three, bridging emotional and physical resilience so people can keep moving toward who they’re becoming.

Mind, Mood, and Movement

From restoring presence to sustaining calm, our ingredients work in concert to keep you anchored to yourself — no matter where life takes you next.

Presence & Connection



AlphaSize® supports neurotransmitter activity and mind–body synchronization — helping restore clarity, confidence, and emotional presence.

Calm & Clarity



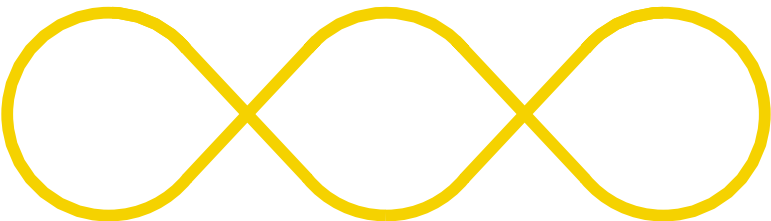
SerinAid® supports healthy cortisol balance & cognitive resilience — keeping emotions steady and thought processes clear when everything else is shifting.

Continuity & Grounding



Mediator® supports muscle maintenance and metabolic stability during transformation — providing a steady physical foundation for emotional adaptation.

Blends for Becoming



CHEMI NUTRA COMPLEX

Advanced formulations built on AlphaSize® science, designed for targeted emotional and cognitive needs across different life stages and transitions.

Closing Thoughts

Redefinition is already here. Across health journeys and everyday routines, people are rewriting what wellness means. They don’t want to go back. They want to move forward—grounded, steady, and connected.

Let’s be the ones who formulate for who people are becoming.

“The goal is no longer peak performance, but sustainable identity.”

— HARVARD BUSINESS REVIEW

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12. CHEMI Nutra Proprietary Ingredient Portfolio & Clinical Dossier (internal).

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