



State of the Industry

VITAMINS & SUPPLEMENTS 2025



Meet Your Presenter



Scott Dicker

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SPINS

Agenda

Market overview

Category Performance

Functional Ingredient Trends

Mood Support

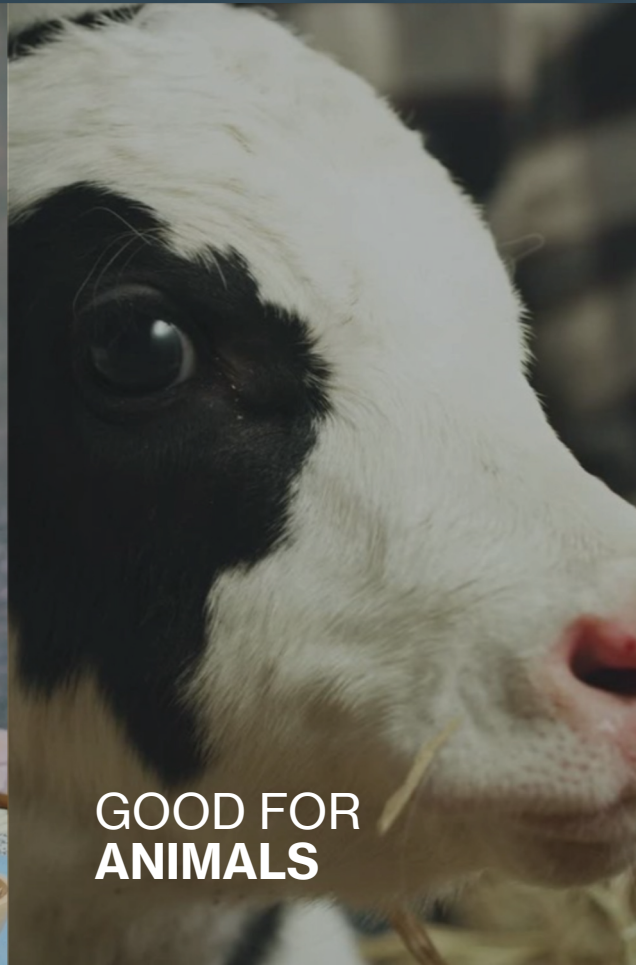
Active Nutrition

What I'm looking out for in 2025

For the past 25 years, **SPINS** has been powering and defining the natural products industry.



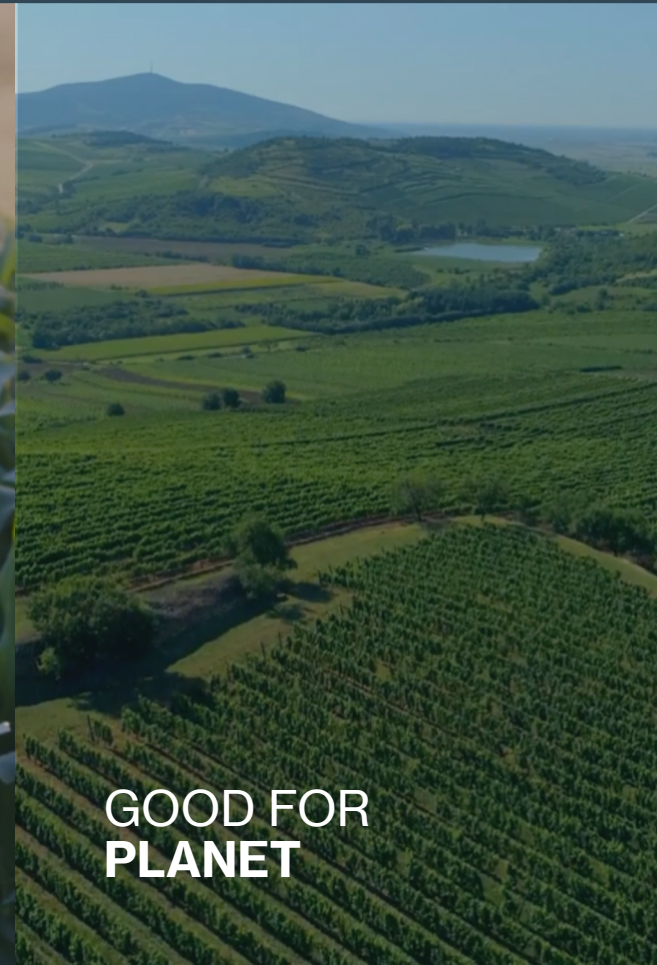
GOOD FOR
HEALTH



GOOD FOR
ANIMALS



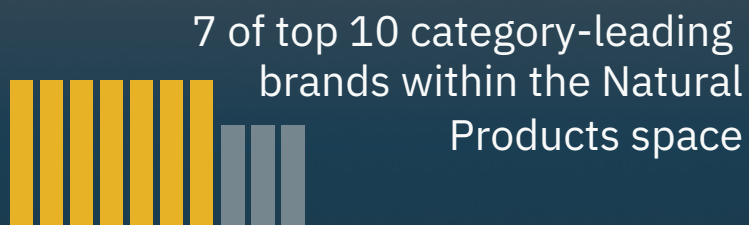
GOOD FOR
PEOPLE



GOOD FOR
PLANET

SPINS WORKS WITH

1500+ Brands



70%

50%

of all U.S.-based brands that have been acquired or funded over the last 24 months*

Brands that work with SPINS grow 22% faster on average than those that don't

22%

**per Whipstitch top 60 deals*

SPINS HAS

76+

Exclusive Retail Partnerships

REPRESENTING

>\$200B

In Sales

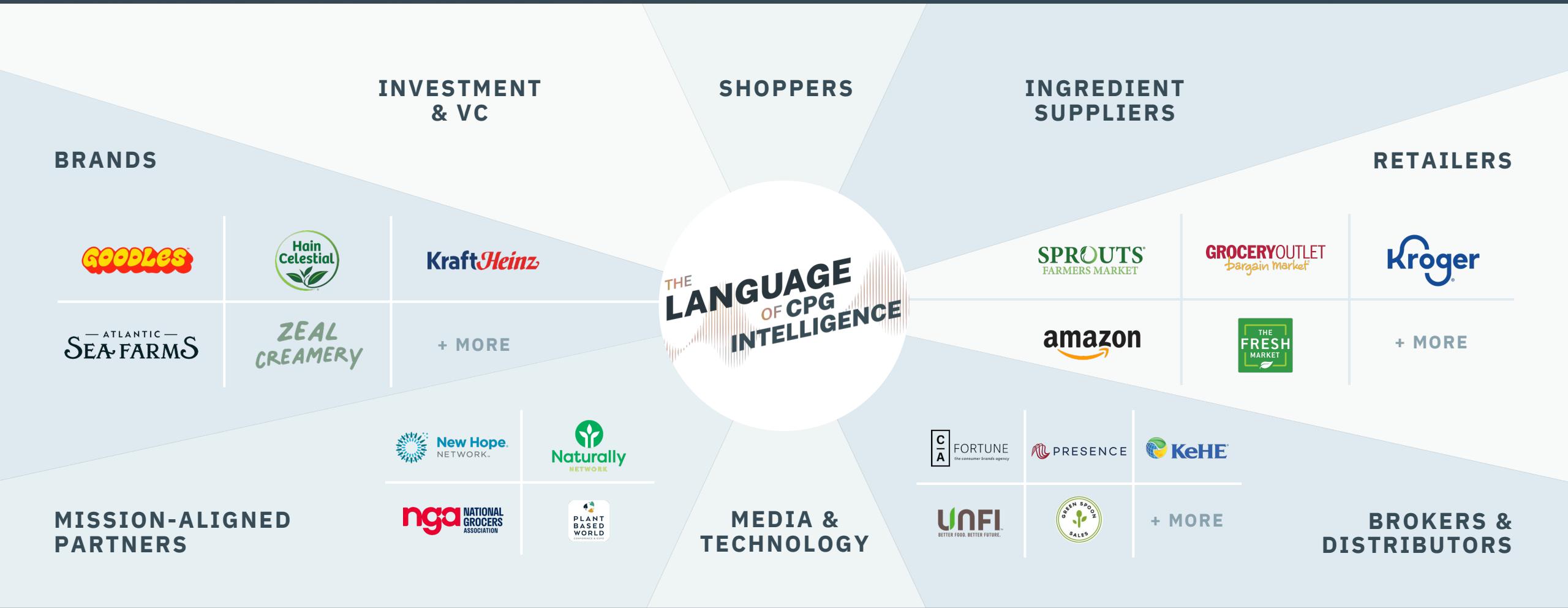
SPINS clients launched over 100,000+ items in the last 3 years



380+
Ecosystem Partners

(excluding brands & retailers)

We empower the community to interact and transact with **efficiency, transparency, and trust.**



Vitamins & Supplements





Supplements are growing in every channel

Prices are stabilized while dollars and units are rising.

Natural Expanded Channel <i>% Chg YAGO</i>	Conventional MultiOutlet <i>% Chg YAGO</i>	Convenience Channel <i>% Chg YAGO</i>	Amazon <i>% Chg YAGO</i>
+3.7% DOLLARS	+2.8% DOLLARS	+4.7% DOLLARS	+11.9% DOLLARS
+5.8% UNITS	+1.4% UNITS	-2.1% UNITS	+10.5% UNITS
-2.0% ARP	+1.4% ARP	+7.0% ARP	ARP

Source: SPINS Total store US Natural Enhanced Channel, Amazon, Conventional Multioutlet , Convenience Channels (powered by Circana)
Department: Vitamins & Supplements
52 Weeks ending 12.29.24

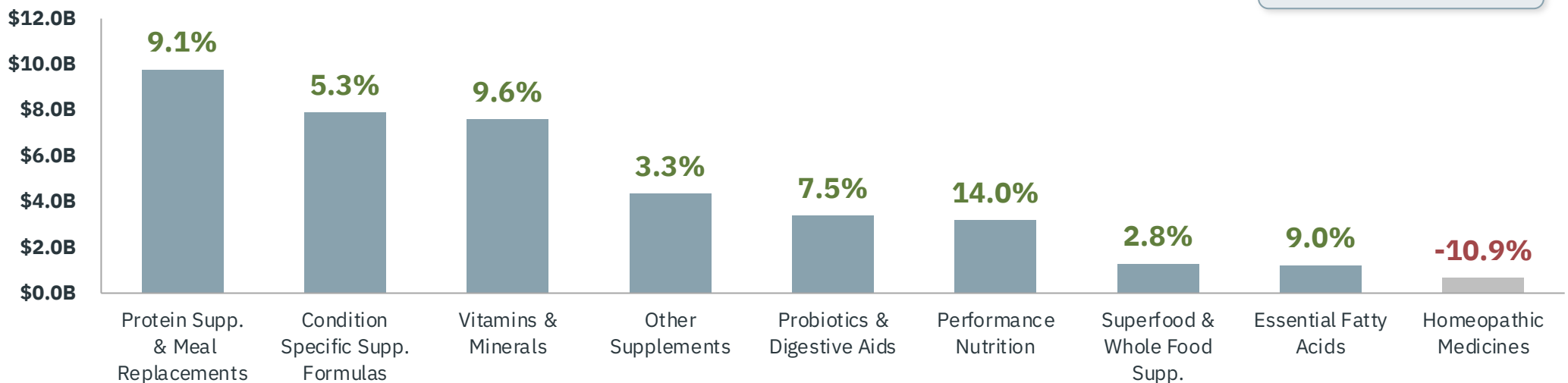


Shoppers are prioritizing holistic and fitness-oriented supplements that enhance physical performance, provide natural and nutrient-dense options, and support muscle development.

Vitamins & Supplements By Category

Dollar Sales, Dol % Chg

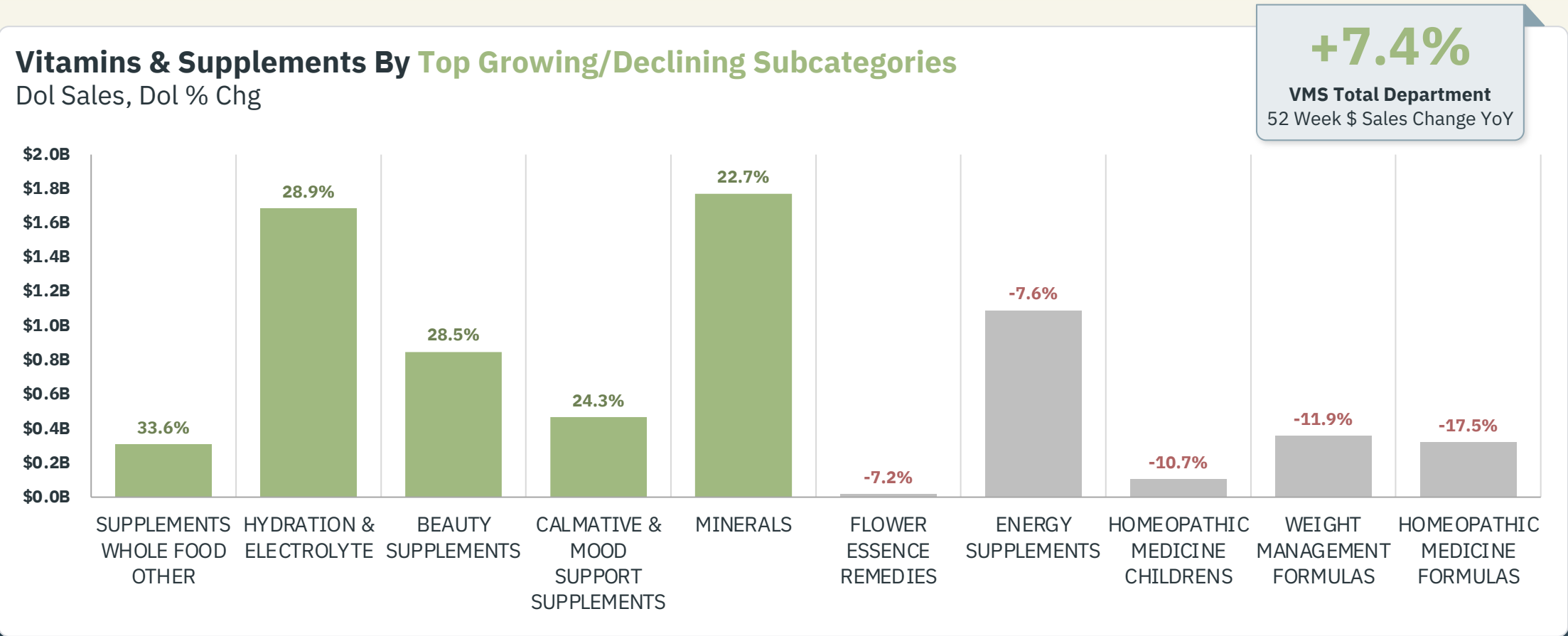
+7.4%
VMS Total Department
52 Week \$ Sales Change YoY



Units % Chg, YAGO:	+8%	-3%	+3%	+0%	+4%	+15%	+2%	+1%	-14%
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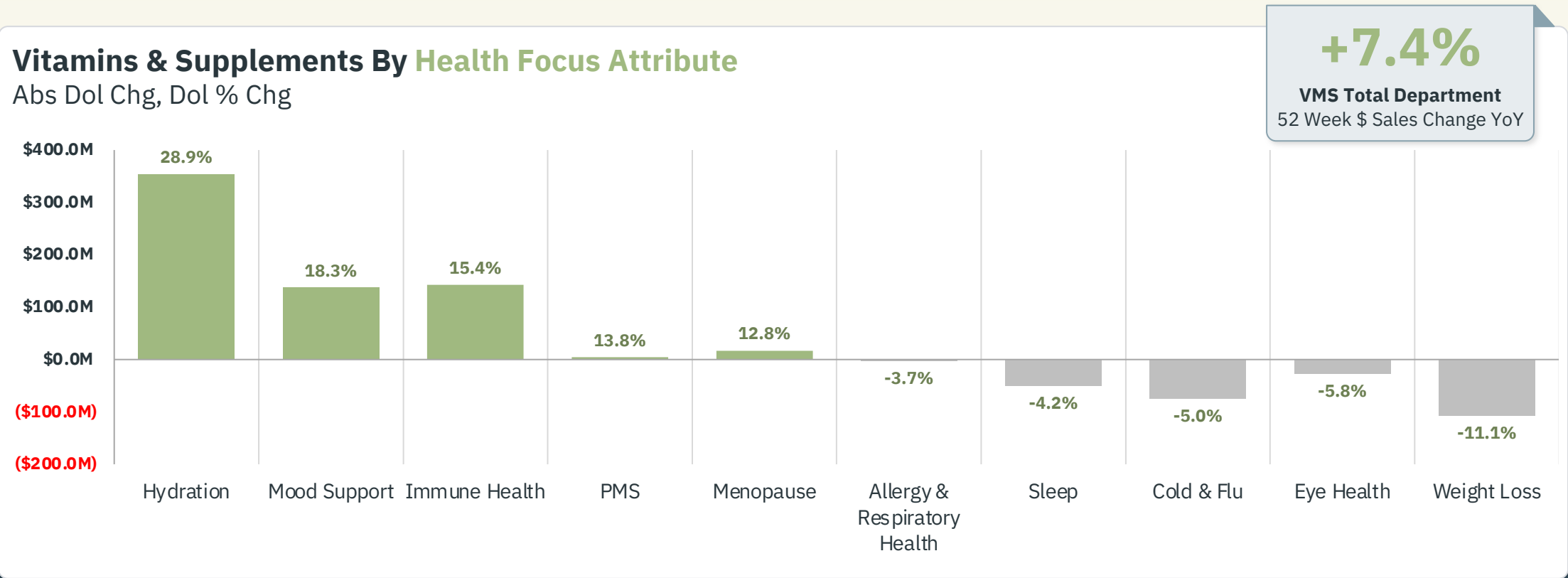
Key themes emerge from high growth subcategories



* % Represents % Change YoY (vs same time LY)



Shoppers remain dedicated to health areas of hydration and mood support, while areas like weight loss and eye health see a decline



* % Represents % Change YoY (vs same time LY)

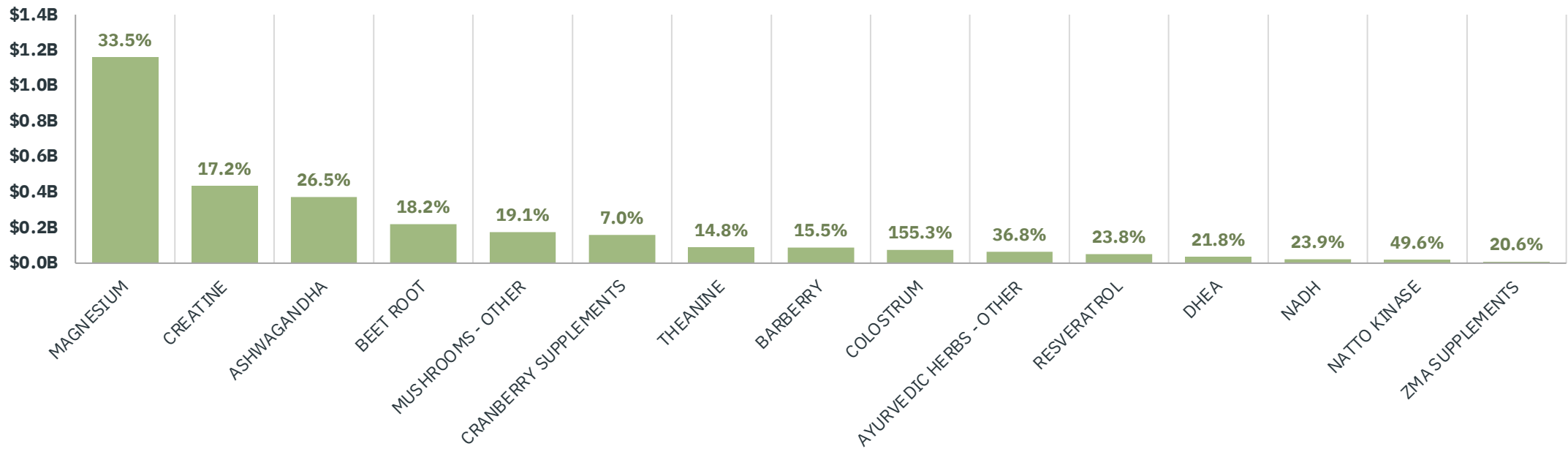


Key functional ingredients remain trendy

Top Relevant Functional Ingredients By Dollars Total Dollars

Dol Sales, Dol % Chg

+7.4%
VMS Total Department
52 Week \$ Sales Change YoY



* % Represents % Change YoY (vs same time LY)





VMS Department Sales and Sales Growth by Top Growth Functional Ingredients

High growth, predominant Natural Channel **functional ingredients** contextualize health focus drivers and emerging ingredient preferences of core Natural consumers

+255%

\$ % Growth vs Year Ago

Colostrum
Immunity & Gut Health



+118%

\$ % Growth vs Year Ago

Algae - Other
Gut/Skin Health | Heart/Brain Health



+28%

\$ % Growth vs Year Ago

Glutathione
Anti-Aging



+22%

\$ % Growth vs Year Ago

Oregano
Immune & Gut Health





Delivery Method

Brick & Mortar

TYPE	MARKET SHARE	YOY GROWTH
Liquid RTD	1	+11%
Powder	2	+9%
Gummy	3	-3%
Tablet	4	-3%
Capsule	5	-1%

Amazon

TYPE	MARKET SHARE	YOY GROWTH
Powder	1	+9%
Capsule	2	+19%
Veg. Capsule	3	+15%
Liquid	4	+17%
Softgel	5	+16%

Mood Support



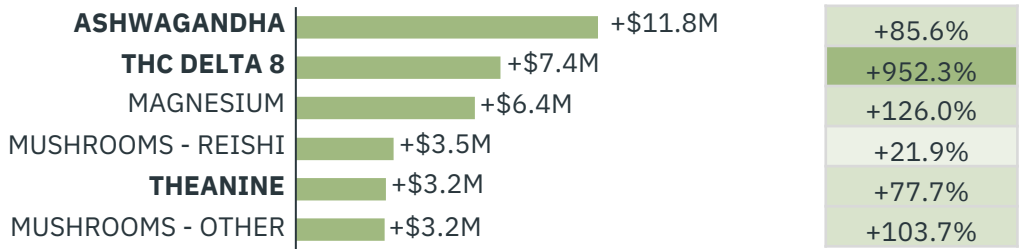


Cutting Back on Alcohol... and Caffeine?

Health-conscious consumers look to cut back on traditional euphorics and are exploring alternatives

Largest Growing Functional Ingredients Across Euphoric Beverage Brands

By Absolute \$ Growth



Sodas that target gut health continue **to grow >125%** and euphoric brands are entering the category

Focus Without The Jitters: Caffeine Alternatives

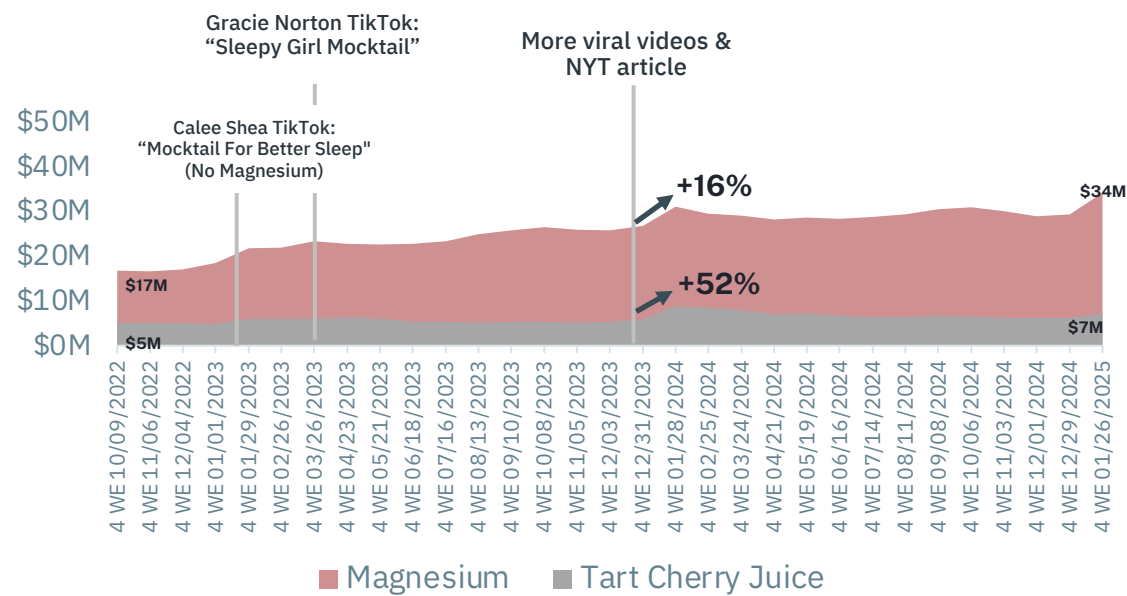




Sleepy Girl Mocktail

This viral drink is a combination of tart cherry juice, magnesium and a prebiotic soda. The trend has been around for a year but is back in the limelight with a slew of videos going viral Oct ‘23 – Jan ‘24 and beyond

Dollar Sales of Sleepy Girl Mocktail Ingredients – 4 Week Period



Jan. 17, 2024

Can This Viral Bedtime 'Mocktail' Actually Help You Fall Asleep?

The New York Times

1-14

Replied to @mzamaznglv

10/10.. my dreams were craz...

cassyeung...

3.3M

2023-12-5

Sleepy girl (& boy) mocktail for your best nights sleep

maddison_...

5.5M

SLEEPY GIRL MOCKTAIL

the only time i struggle w...

1.6M

MOCKTAIL FOR BETTER SLEEP

this mocktail has me in a ...

189.6K

Sofia's Sweet Cherry Smoothie

20 oz

\$21.00

Launched Feb 2024

Contains:

- Malk Organic Unsweetened Almond Milk
- R.W. Knudsen Organic Tart Cherry Juice
- Cowboy Colostrum Vanilla
- Natural Vitality Original Calm Powder
- Woodstock Foods Organic Dark Sweet Cherries
- Maple Joe Dark Organic Pure Maple Syrup
- Organic Pineapple
- Organic Avocado
- Organic Coconut Cream
- Organic Pitaya Powder

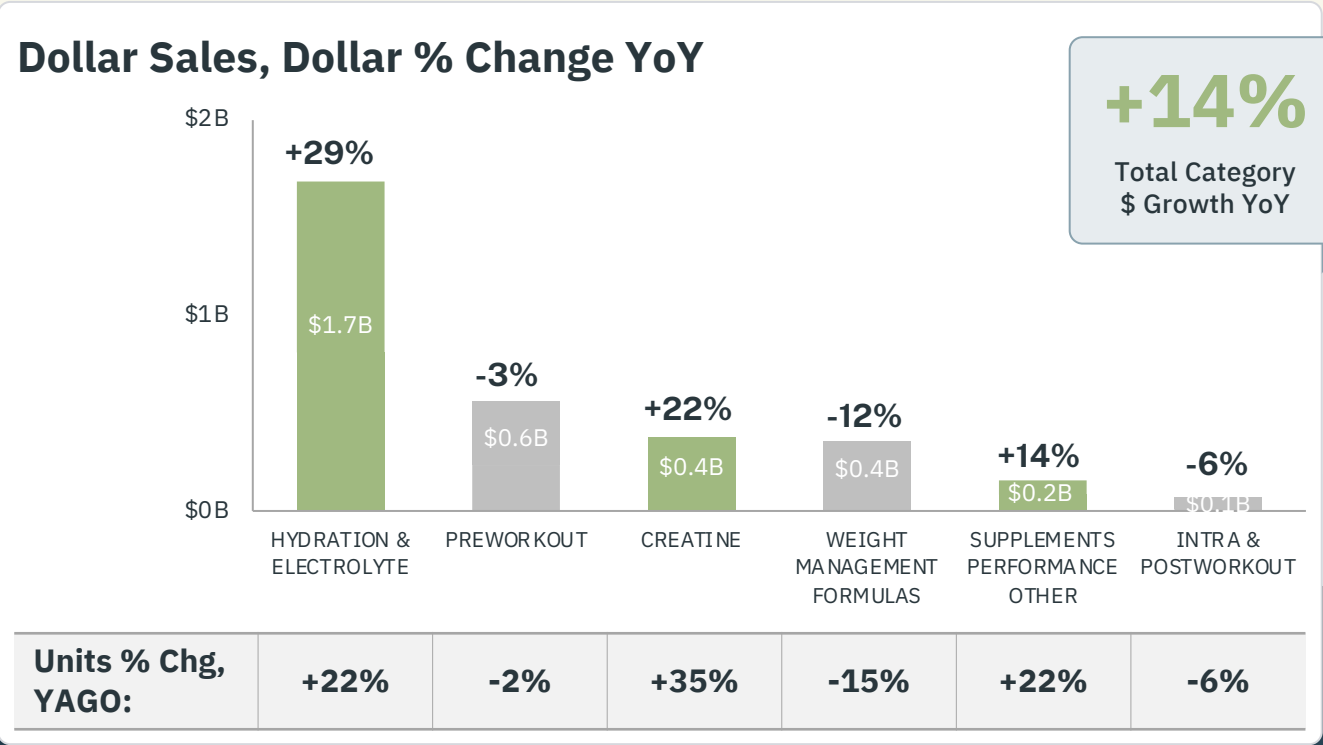
Active Nutrition





Performance Nutrition category growth driven by Creatine and Hydration & Electrolyte

Performance Nutrition Subcategory Growth



* % Represents Dollar % Change YoY (vs same time LY)



High Protein

Consumers, with increasingly more women are looking for high protein label claims

+9.1%

Protein Powder & RTD
52 Week \$ Sales Change YoY

Whey Protein Powder is driving the most sales & growth

SOURCE	MARKET SHARE	YOY GROWTH
Whey	39%	+10%
Collagen	24%	+0% #1
Plant	17%	+0%
Animal	4%	-12%
Blend (Animal & Plant)	3%	-3%

Social Media Trending: 30-30-3

30 grams of Protein, 30 grams of Fiber, 3 Probiotic Foods



SS Cookies & Snack Bars



20g Protein

SS Chips, Pretzels & Snacks



18g Protein

SS Cold Cereals



13g Protein



Room To Grow for Creatine: Gummies & Beverages

Creatine Gummies:

+22%

Total Creatine
Subcategory
\$ Growth YoY

+360%

YoY \$ Growth



Creatine RTD:



Room to Keep Growing:

New forms ✓

New demographics ✓

New health focuses ✓

And Take more ✓

Single dose creatine improves cognitive performance and induces changes in cerebral high energy phosphates during sleep deprivation

[Ali Gordji-Nejad](#), [Andreas Matusch](#), [Sophie Kleedörfer](#), [Harshal Jayeshkumar Patel](#), [Alexander Drzezga](#), [David Elmenhorst](#), [Ferdinand Binkowski](#) & [Andreas Bauer](#)

[Scientific Reports](#) 14, Article number: 4937 (2024) | [Cite this article](#)



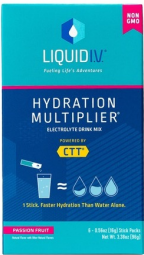
ACTIVE NUTRITION



Sports & Rehydration Drinks



Hydration & Electrolytes






What’s Next on the Hydration Horizon?

Newer entrants in hydration are mixing it up with refreshing forms that build on a continued demand for simple, portable solutions that are both accessible and appealing to the everyday water drinker

Hydration Drops




Hydration Liquids under 5oz:

+10%

YoY \$ Growth

Hydration Gummies




Hydration Gummies:

+73%


YoY \$ Growth

Hydration Plus


+ Immunity







+ Energy



+... Protein?



Nature’s Hydration

YoY \$ Growth	
 <p>Coconut Water <i>Coded for Hydration Benefit</i></p> <p>+11%</p>	 <p>Aloe Juice/Drink <i>Coded for Hydration Benefit</i></p> <p>+30%</p>
 <p>Watermelon Juice <i>Coded for Hydration Benefit*</i></p> <p>+28%</p>	 <p>Pickle Juice <i>Coded for Hydration Benefit</i></p> <p>+3%</p>

Source: SPINS Natural Channel, MULO, Convenience (powered by Circana)
Department: VMS, Form: Gummy
52 Weeks Ending 12.29.24

*Watermelon Juice comprises 100% of Hydration-Benefit beverages in product type “Plant Water Other”
Source: Total US MULO + Convenience & Total US Natural Expanded Channel,
L52W Ending 12/29/2024



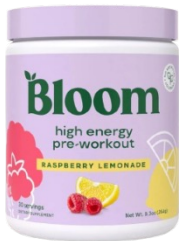
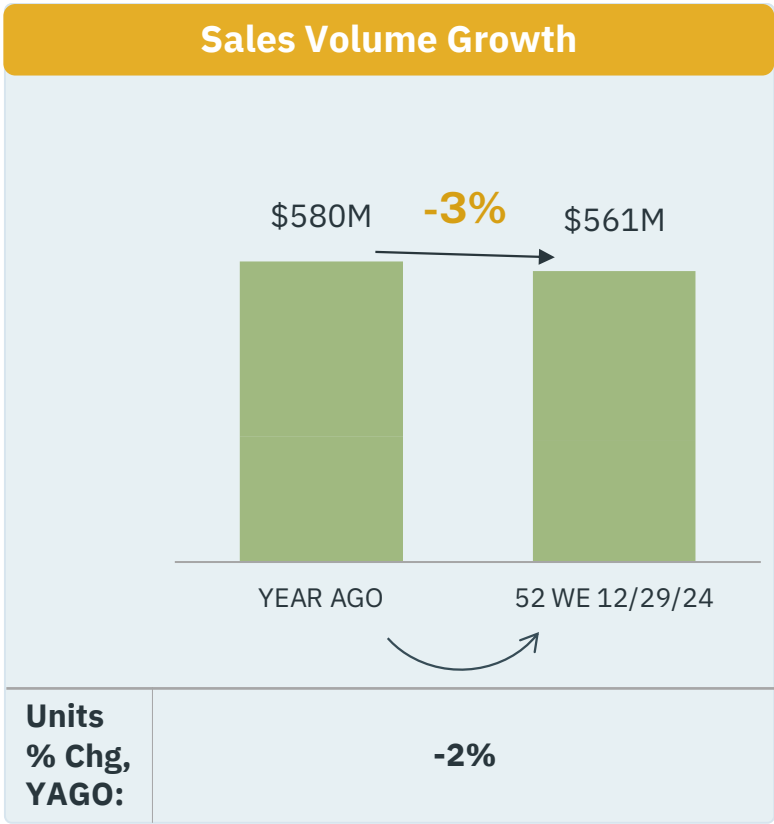
ACTIVE NUTRITION



Energy Drinks



Pre-Workouts

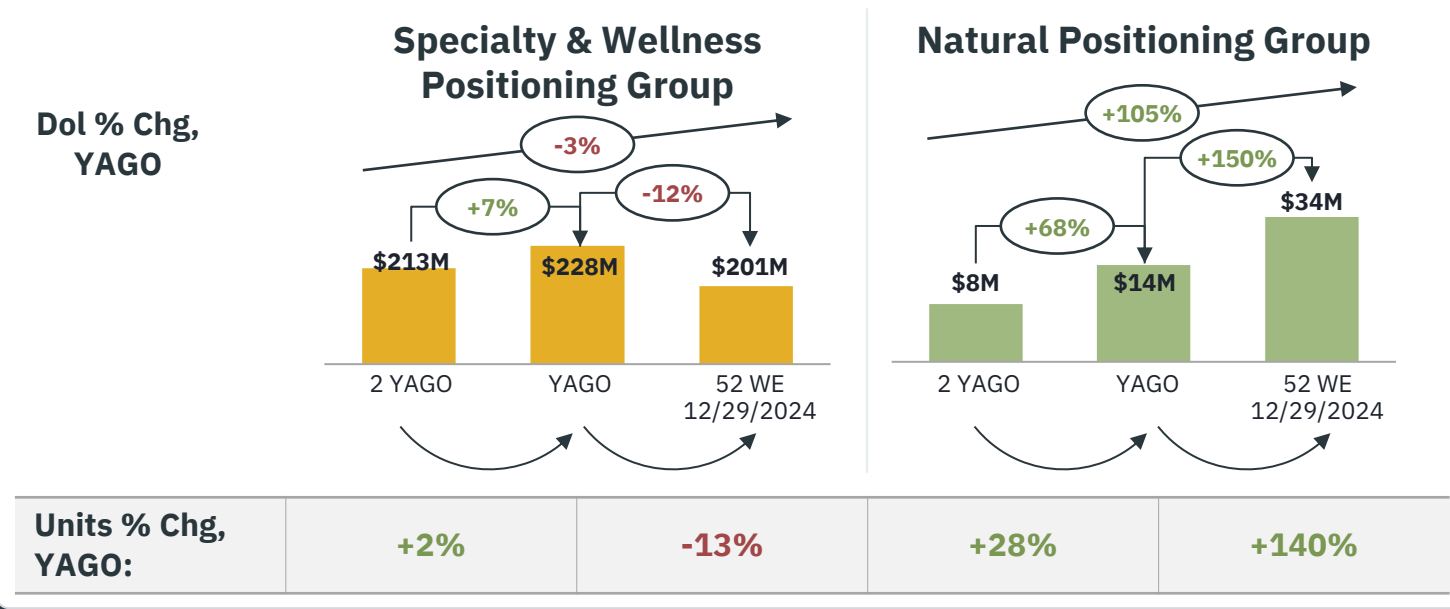




Shoppers are seeking alternatives to stimulants, **shifting towards natural, multifunctional preworkout blends** that enhance performance in focus, muscle recovery, and endurance.

Pre-workouts, Positioning Group Attribute, 2 Year CAGR

Dollar Sales, Dol % Chg, Unit % Chg



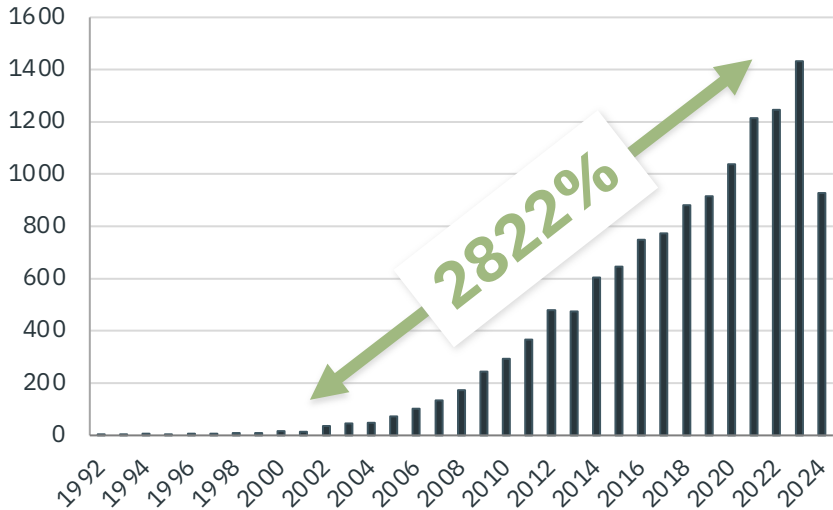
Things I am looking out for





We Cannot Underestimate the **Likely Impact of Glp-1s**, Particularly With the Likely Approval of Oral Versions

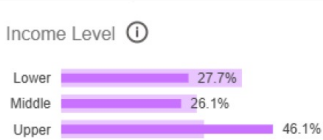
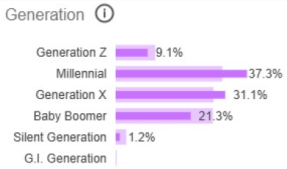
Publications on pubmed*: search term
“GLP-1 RA”



*all types of publications, not indicative of results or quality

GLP-1s/ Semaglutide Injections

Who are the GLP-1 Users?



 BRIGHTFIELD GROUP

For educational purposes only.



Companions - Categories that look to fill nutrient gaps will see boosts as consumers appetites decline

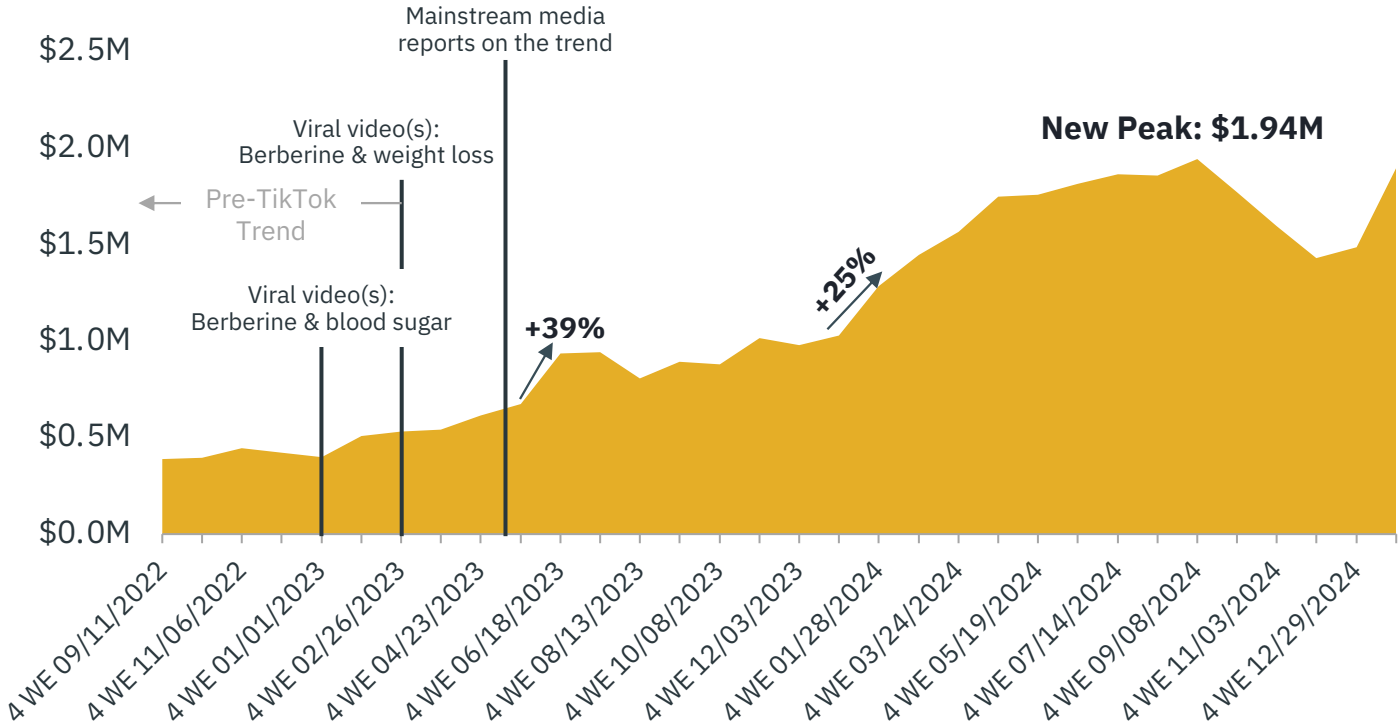


Time Frame	2023 vs. YAGO		2024 vs. YAGO	
Category	\$ Sales	Units	\$ Sales	Units
Protein Supps. & Meal Replacements	+16%	+11%	+9%	+8%
Green Supplements	+19%	+12%	+5%	+2%
Probiotics/Prebiotics	+2%	-3%	-1%	-3%
Multivitamins	+1%	-6%	+1%	-2%



Competitors: Berberine, dubbed “Nature’s Ozempic”

Dollar Sales of Berberine Supplements by 4 Week Periods



Eriomin



- Dietary Supplements**
 - Versatile powder for single-ingredient capsules and blends
 - Granulated compressed available for tablets
- Functional foods & beverages**
 - Suspendable in beverages
 - Masking property for bitter flavor profiles
 - Neutral flavor profile
 - Useful as a natural preservative

In three randomized, double-blind, placebo-controlled clinical trials, Eriomin supplementation (200 mg/day) consistently demonstrated significant improvements in GLP-1 levels. Across these studies, participants experienced an average increase of 17.5% in GLP-1 compared to placebo, with one study showing increases as high as 22%. These findings suggest that Eriomin can effectively support the body's natural GLP-1 production and function.*



Personalization Finally Comes

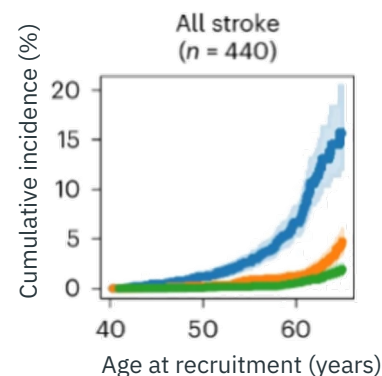
From rings to watches, consumers can track sleep, stress and so much more – allowing them to optimize like never before

Wearables Boom

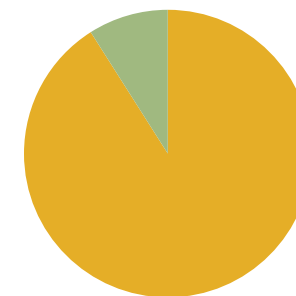


58% of population uses health or fitness apps or trackers on their phones, computers, in the gym, or through other devices

Biological Age



AI Feedback



91% of those who use apps to track health and fitness will buy an app recommended supplement, sports nutrition product or meal plan at least once a year



THINGS I AM LOOKING OUT FOR



Evolution of Search

Search engines used to reign supreme but now, consumers have more ways to find the products they’re looking for





AI Search Takeover

Below is what it's like to ask AI what are the best **creatine** – how does a brand get on a list like this?

Perplexity

- Thorne
- Optimum Nutrition
- Gnarly
- SteelFit
- Transparent Labs

ChatGPT

- Thorne
- Optimum Nutrition
- Kaged
- Transparent Labs
- BulkSupplements
- MuscleTech
- Beast Sports Nutrition
- Cellucor
- MyProtein
- NOW

Gemini

- Transparent Labs
- Optimum Nutrition
- Nutricost
- Naked
- Onnit

Why AI Chatbots?

Consumers are annoyed with SEO-gamified/ low quality articles

Now, consumers often add **'reddit'** (a forum site) to the end of their search to get better answers [6th most searched term on google in 2024]

Reddit now sells its data to OpenAI, Perplexity and others as they use forum answers to power their models



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