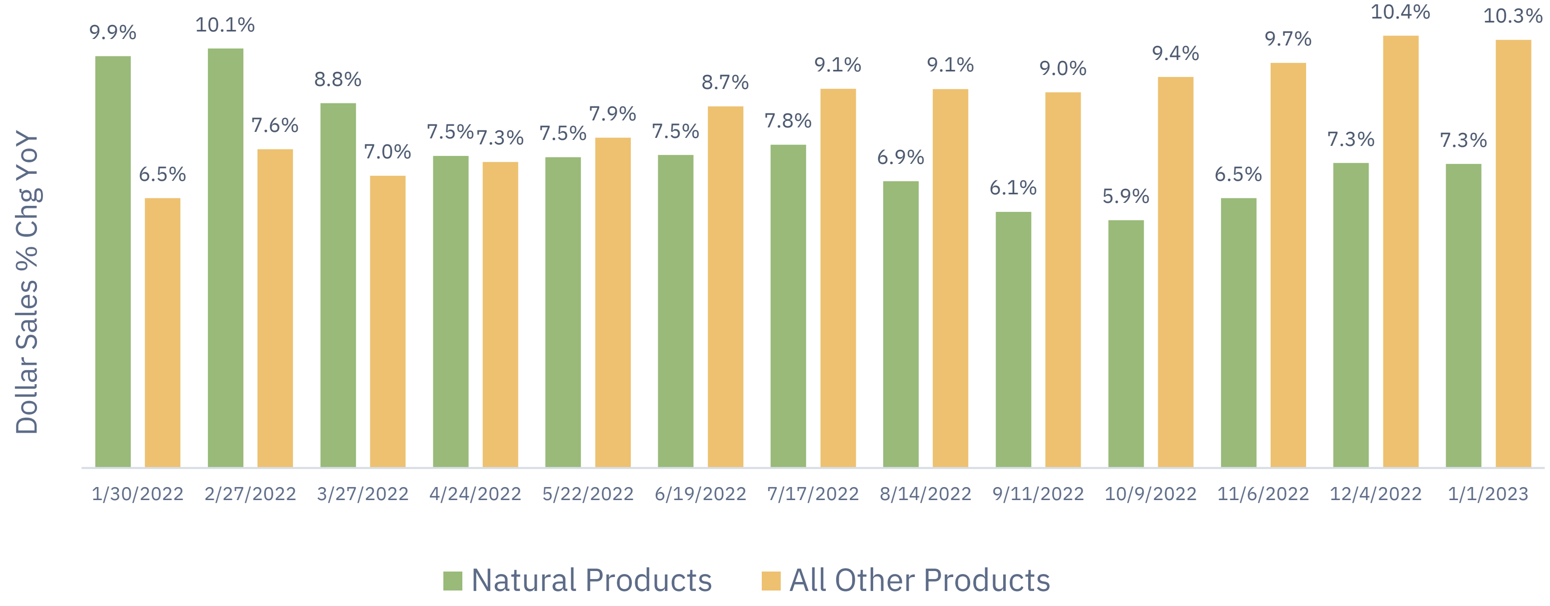
SPINS®

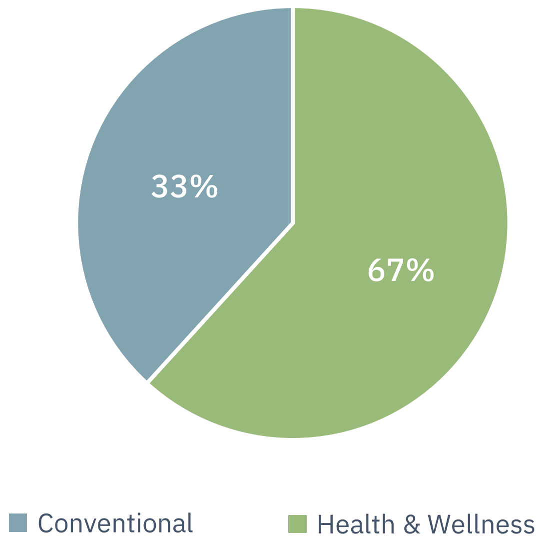
Natural Products Expo West 2023

Across all retail outlets, **shoppers continue to buy natural products at an increasing rate** and outpacing other product sales growth

CPGs are responding—most new CPG brands have a health and wellness focus



~4,700 New Brand Introductions in 2022



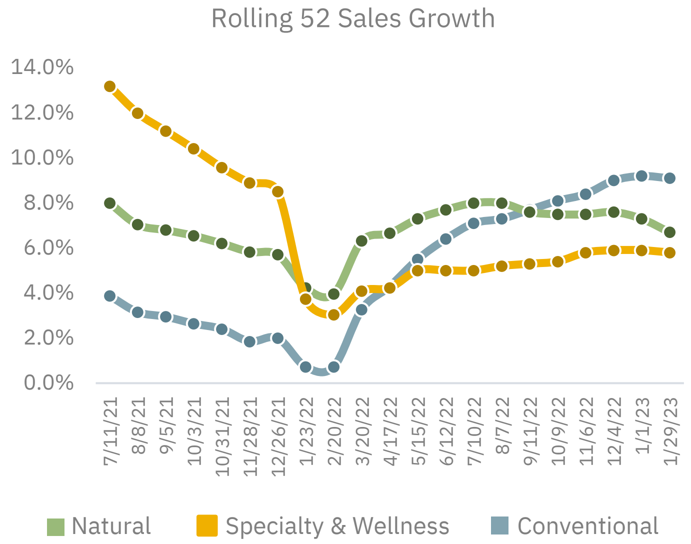
Source: IRI All Outlet Panel, Enhanced with SPINS Product Attribution, each time period represents 12 weeks
New Brand Intros: SPINS Total US Natural Channel + Conventional MultiOutlet+ Convenience, 52 Weeks ending 1/1/2023.

The Rise of **Health & Wellness**

Today’s modern commerce is powered through changing shopper preferences that only SPINS proprietary Product Intelligence can uncover

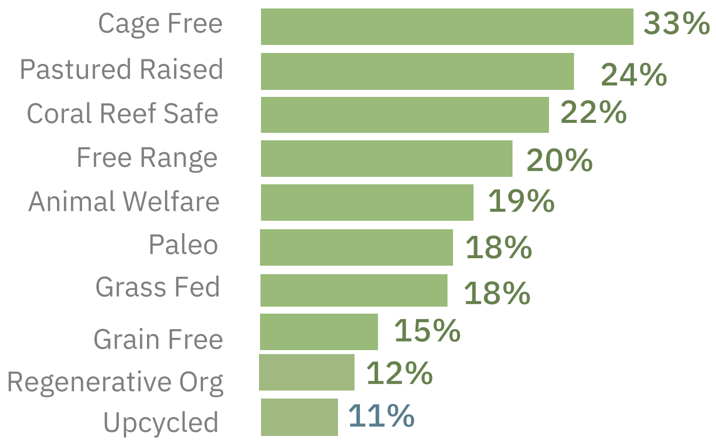
The Health & Wellness Market is estimated at $270B(1) and Naturally Positioned products continues to be the growth driver

Total Growth of Food & Beverage Products



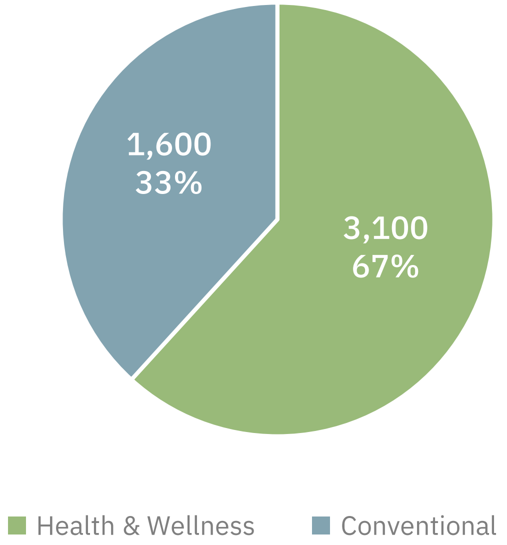
Health & Wellness is a complex, fast growing ecosystem(2)

2022 U.S. Growth of Product Sales by Select Attributes



Majority of New CPG Brands Introduced Coming from Health & Wellness(2)

~4,700 New Brand Introductions in 2022



Source: (1) Nutrition Business Journal, (2) SPINS Total US Natural Enhanced Channel+MultiOutlet, 52 Weeks ending 1/29/2023

Surprise: Conventional positioned brands were the primary source of CPG innovation and market growth

Health & Wellness Products – Year Over Year $ Sales Growth

+7.1%

Natural Positioned Products (NPI)

+6.0%

Specialty & Wellness Positioned Products

Conventional Products

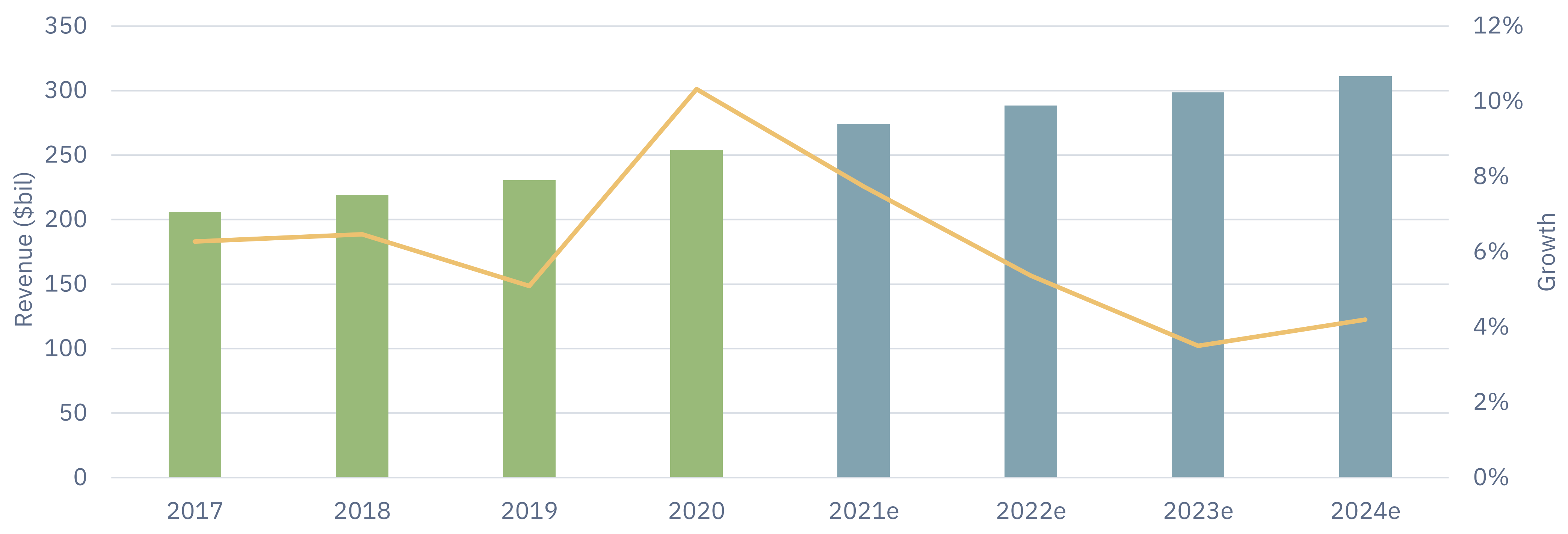
+9.0%

Conventional Products

Source: SPINS Total US Natural Enhanced Channel + Conventional Multioutlet (powered by IRI), 52 Weeks ending 1/29/2023

Even in the face of recession, **the U.S. natural & organic products industry is poised to hit $300B in sales by 2023**

U.S. natural & organic products industry sales grew est. 7.7% to $274B in 2021; sales on track to surpass $300B by 2024 and $400B by 2030



Source: Nutrition Business Journal ($mil, consumer sales), powered by SPINS

Upcycled Gaining Traction

Using upcycled ingredient sources adds innovation opportunities across an increasing number of categories that capitalize on once discarded food sources as a solution to mitigate negative climate impacts.

Dollar Sales

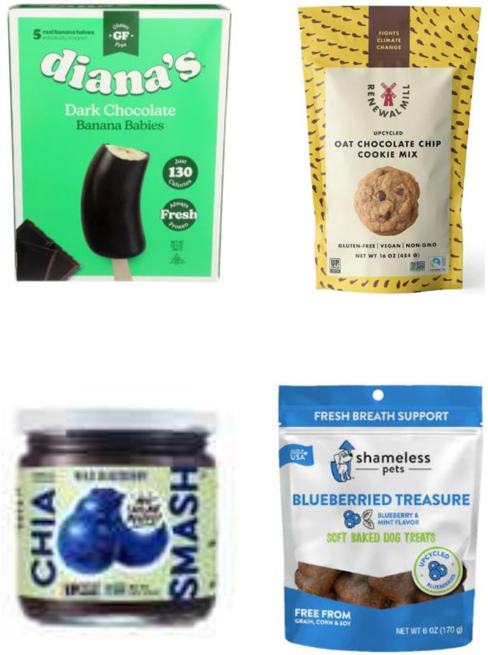
$30M

YoY Growth

+21.0%

Categories where Upcycled Certified is showing growth

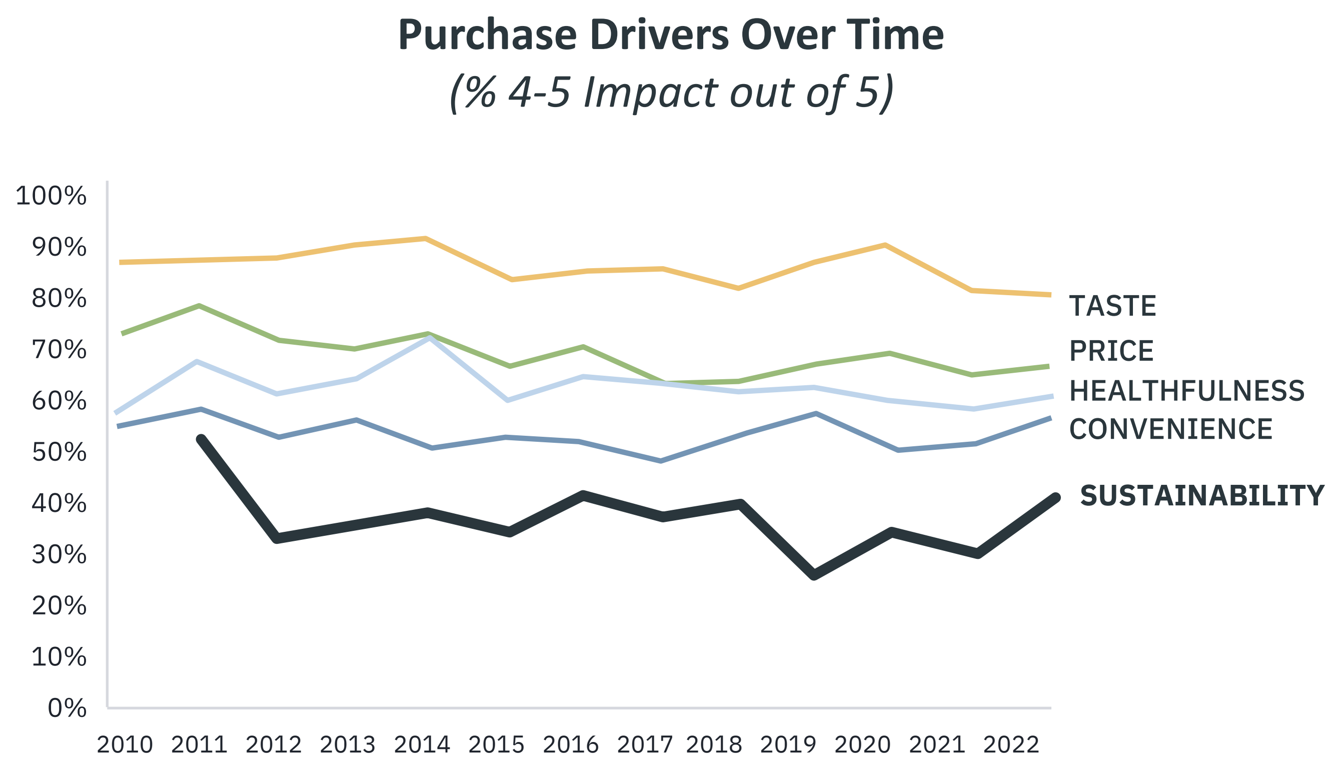
Category	%growth YoY
Frozen Desserts	+9.5%
SS Fruits & Vegetables	+44.0%
Pet Treats	+86.5%
SS Fruit Spreads & Jams & Jellies	+3,740.0%
SS Chips, Pretzels & Snacks	+27.1%
Refrigerated Plant Based Milk	+99.4%
FZ & RF Meats, Poultry & Seafood	+409.7%
SS Nuts & Trail Mix & Dried Fruit	+6.6%
SS Baking Mix & Ingredients & Flour	+220.7%

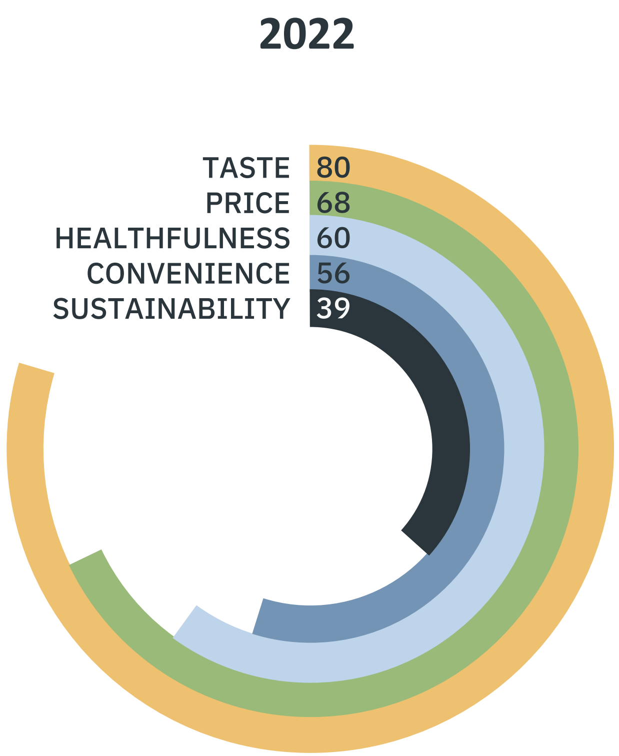


SPINS: Natural Enhanced Channel & Conventional Multi-Outlet (powered by IRI); 52 Weeks Ending 1.29.23
Powered by SPINS Product Intelligence: Certified Upcycled

The importance of environmental sustainability has increased in 2022

Although it still ranks below other purchase drivers, 4 in 10 say environmental sustainability has an impact on their decision to buy certain foods and beverages.



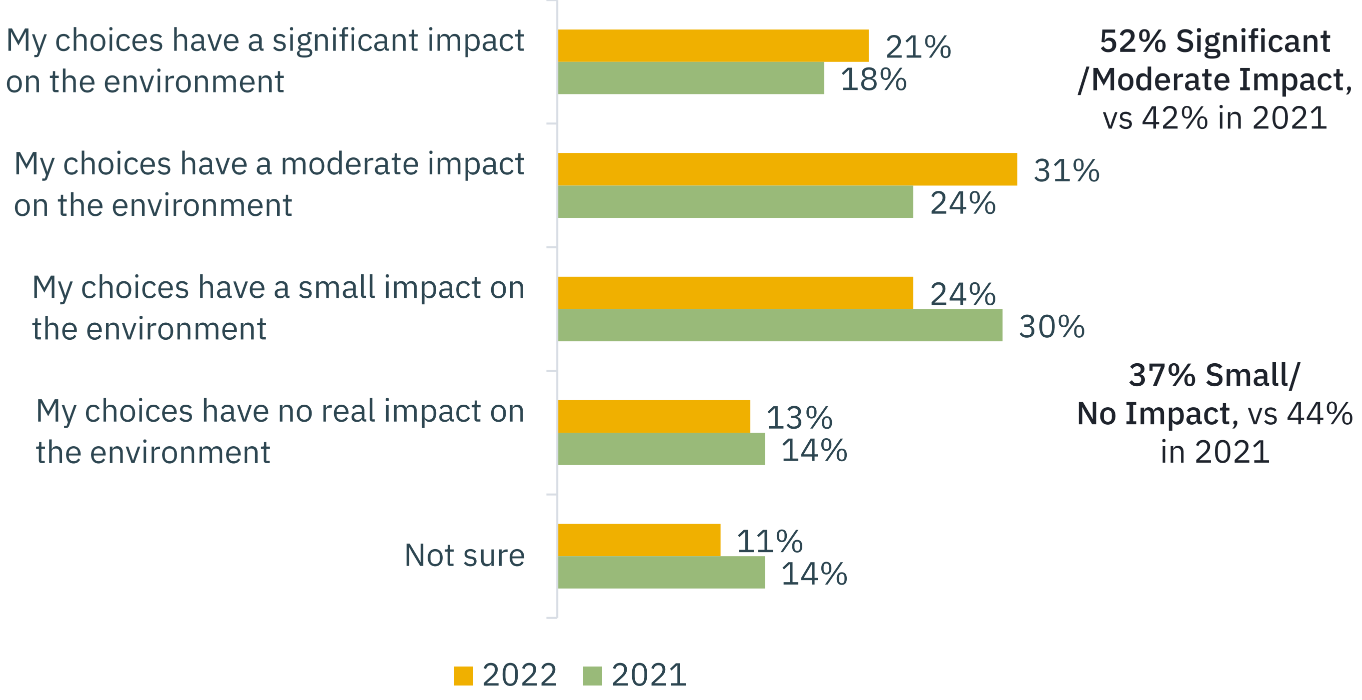


Source: International Food Information Council, [TREND] Q6 How much of an impact do the following have on your decision to buy foods and beverages? SUMMARY: TOP 2 (Great Impact/Somewhat of an Impact); (n=1,005) *Prior to 2019, Environmental Sustainability was addressed as "Sustainability"

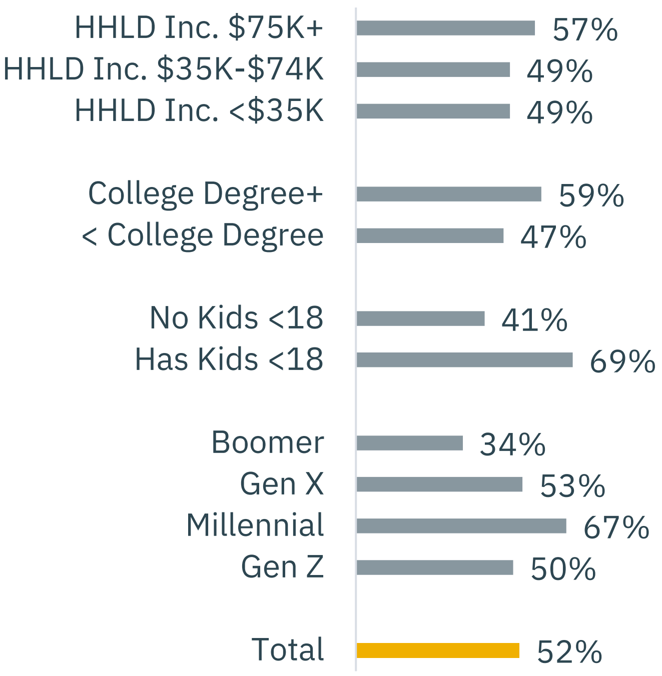
Over half now believe their food choices have an impact on the environment

Millennials, parents with young children, those with a college degree, and those with higher incomes are more likely to believe their choices have an impact

Impact of Food/Beverage Choices on Environment



% Significant/Moderate Impact by Subgroups



Source: International Food Information Council, [TREND] Q8 To what degree do you believe your individual choices about food and beverage purchases impact the environment? (n=1,005)

Over half now believe their food choices have an impact on the environment

Millennials, parents with young children, those with a college degree, and those with higher incomes are more likely to believe their choices have an impact

Source: International Food Information Council, [TREND] Q11 How concerned are you about the amount of food waste (food that gets thrown away) that your household produces? (n=1,005), Q11A Why do you feel concerned about the amount of food waste your household produces? (Select all that apply) Filter: Very/Somewhat concerned about the amount of food waste your household produces (n=570); Note: "other" and "none of the above" are not shown

Snack/Beverages

Super Mushrooms

Super Mushrooms (such as Reishi, Lions Mane, and Turkey Tail) have begun to level off in Vitamins & Supplements but continue to experience a steep upward trajectory in Snacks & Beverage as brands look to differentiate with trending & popular wellness ingredients.

Vitamins & Supplements

Dollar Sales	YOY Growth
$114M	**-2.6%**

Snacks & Beverage

Dollar Sales	YOY Growth
$186M	**+28.7%**

Top Super Mushroom Snack & Beverage Categories

Category	Sales	%growth YoY
Shelf Stable Cookies & Snack Bars	$60.7m	+61.0%
Shelf Stable Chips Pretzels & Snacks	$38.3m	+0.1%
Kombucha & Other Functional Bev	$26.5m	+46.2%
Shelf Stable Crackers & Crispbreads	$13.3m	-5.3%
Refrigerated Juices	$11.8m	+12.3%
Shelf Stable Coffee & Hot Cocoa	$10.2m	+31.7%
Creams & Creamers	$5.8m	+42.3%
Shelf Stable Tea	$5.0m	-5.0%
Wellness Bars & Gels	$4.4m	+48.4%
Shelf Stable Tea & Coffee RTD	$2.7m	+321.0%

Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23
Powered by SPINS Product Intelligence: Ingredient – Super Mushrooms

Beverage as Medicine

Shoppers continue to rally behind beverages that are positioned to boost and support key health aspects. Watch for white space and innovation within categories to reboot shopper interest across the beverage aisle.

Top Performing Health Focuses Tracked in Beverage

Health Focus	Sales	%growth YoY
Pain & Inflammation	$4.1m	+37.8%
Cleanse & Detox	$13.0m	+35.4%
Mood Support	$19.1m	+26.2%
Immune Health	$48.8m	+20.2%
Hair Skin & Nails	$8.2m	+12.3%
Cold & Flu	$65.7m	+17.5%
Cardiovascular Health	$0.1m	+15.9%
Energy Support	$6692.4m	+13.2%
Digestive Health	$982.9m	+11.9%
Hydration	$6209.5m	+10.4%

SODA Category:

Health Focus	YoY Growth
Digestive Health	+192.1%
Performance	+77.5%
Cognitive Health	+74.0%

WATER Category:

Health Focus	YoY Growth
Cold & Flu	+97.6%
Digestive Health	+74.3%
Energy Support	+24.7%

Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23
Powered by SPINS Product Intelligence: Health Focus

SNACKING

Specialty & Wellness and Natural Products Fairing Better To Inflationary Market

	CONVENTIONAL PRODUCTS			SPECIALTY & WELLNESS PRODUCTS			NATURAL PRODUCTS		
Category Growth	$ Volume	$ % Chg	Unit % Chg	$ Volume	$ % Chg	Unit % Chg	$ Volume	$ % Chg	Unit % Chg
Chips, Pretzels, & Snacks	$23.6B	+15.1%	-1.8%	$3.5B	+19.0%	+2.9%	$3.5B	+11.4%	-1.5%
Cookies & Snacks Bars	$12.4B	+11.1%	-5.4%	$1.6B	+12.4%	-2.0%	$1.1B	+16.4%	+0.1%
Nuts, Trail Mix, & Dried Fruits	$6.2B	+0.7%	-6.3%	$1.4B	-2.0%	-4.4%	$658	+2.4%	-2.2%
SS Salsas & Dips	$2.2B	+8.9%	-3.0%	$410M	+11.3%	+0.5%	$128M	-2.8%	-11.3%
Jerky & Meat Snacks	$2.1B	-0.3%	+12.2%	$260M	+1.0%	-7.2%	$167M	+18.2%	+5.6%
Refrigerated Salsas & Dips	$1.6B	+20.2%	+7.9%	$1.1B	-14.2%	-23.8%	$383M	+23.6%	+17.6%
Rice Cakes	$347M	+14.9%	+0.2%	$9M	+56.8%	+46.3%	$80M	-10.9%	-18.4%
Wellness Bars & Gels	$4M	+818.7%	+668.2%	$1.2B	+5.3%	-8.1%	$2.1B	+8.0%	-14.9%

Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23
Powered by SPINS Product Intelligence: Positioning Group

SNACKING

The snacking aisle continues to deliver unique options for every shopper preference

Chips, Pretzels & Snacks

Classic Update

Grain Free

Old Time Favorite

Functional Snacking

Jerky & Meat Snacks

Plant-Based

Animal Welfare

Giving Back

Global Flavors

Rice Cakes

Organic

Indulgence

Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23

Sweetener Types RTD Beverage

RTD Beverages $ % Change L52 Weeks

Natural Sweeteners	
+20%	Natural Low Calorie Swt.
+11%	Only Naturally Sweetened
+47%	Coconut Sugar
+7%	Agave Nectar

Sugar Alcohols	
+23%	Sugar Alcohols
+26%	Erythritol

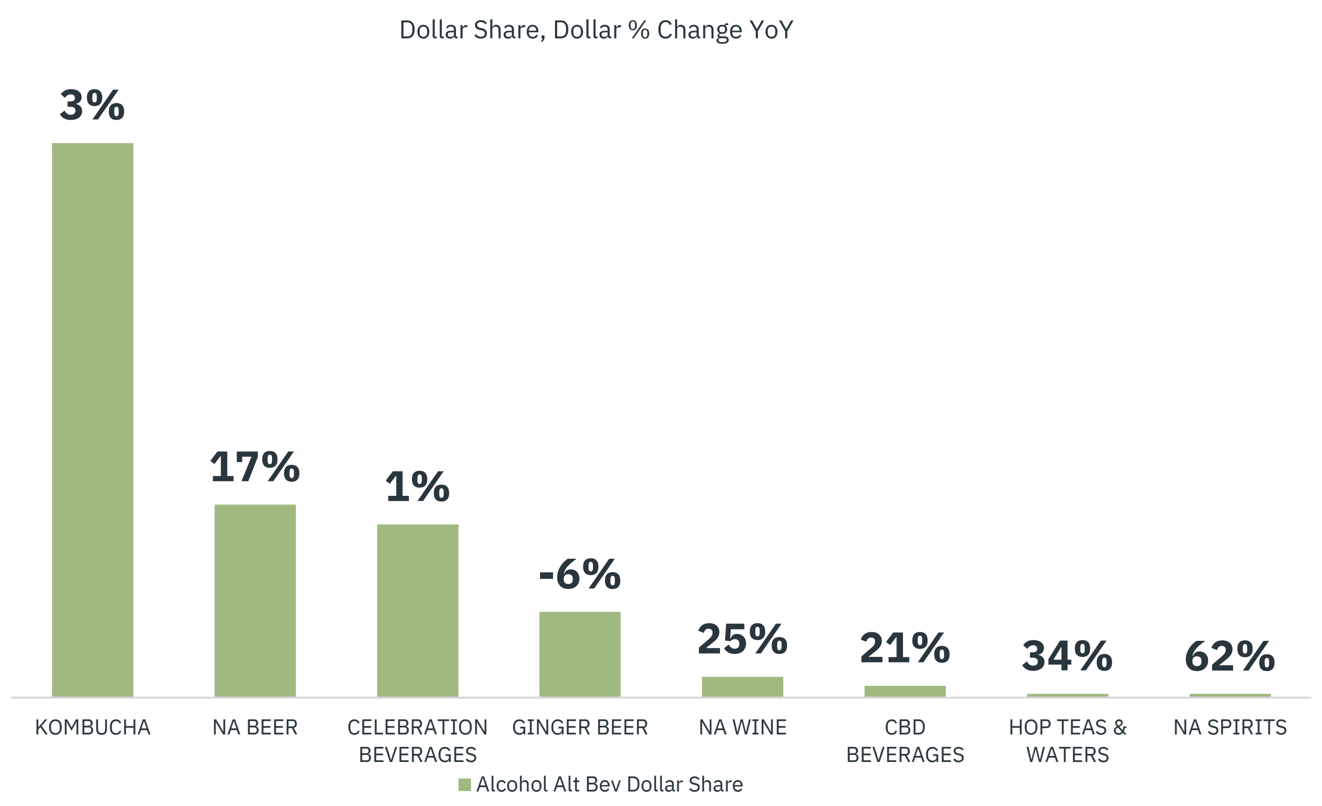
+8.9% **RTD Beverages** % Change L52 Weeks

Artificial & Controversial Sweeteners	
+11%	Artificial Sweeteners
+11%	Aspartame
+7%	High Fructose Corn Syrup
+11%	Sucralose

Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23

Alcohol Alternative Beverages

Segment Growth



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

Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23

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Meat/Dairy/Plant Based Alternatives

Non-Animal Dairy Protein

‘NEXT GEN’ INGREDIENTS ARE CATEGORY DISRUPTORS

Derived through precision fermentation, animal free dairy proteins are considered a sustainable alternative to animal derived milk proteins

Poised for broader proliferation across categories.

Identical to animal derived milk proteins and must be labeled as a milk allergen.

$3.3m
Frozen Desserts

$212k
Dairy & Dairy Alts

$25k
Protein Supplements

Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23
Powered by SPINS Product Intelligence: Ingredient – Non Animal Dairy Protein

Sustainability continues to buoy Dairy categories

In efforts to combat the negative perceptions of animal agriculture, dairy brands have continued to make in-roads toward positioning themselves as sustainable solutions as well.

CERTIFIED REGENERATIVE ORGANIC
+262.3%

LABELED FAIR TRADE
+12.9%

CERTIFIED B CORP
+8.3%

LABELED FREE RANGE
+25.0%

LABELED ANIMAL WELFARE
+11.9%

LABELED ORGANIC INGREDIENTS
+6.5%

LABELED GRASS FED
+14.8%

LABELED NON-GMO
+9.8%

Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23

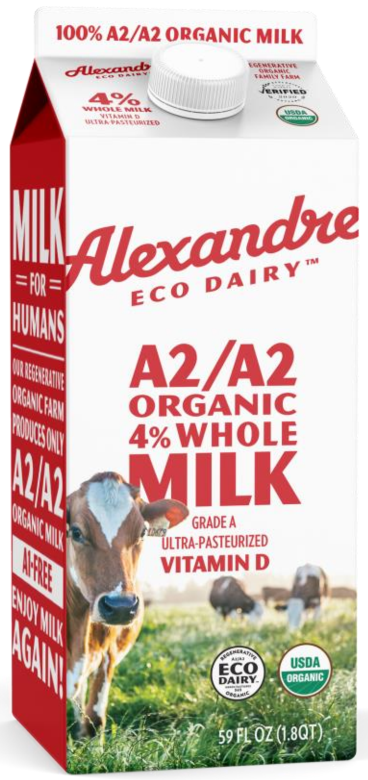
Regenerative Meat & Dairy

‘NEXT GEN’ AGRICULTURE PRACTICES ARE CATEGORY DISRUPTORS

Concerns over climate change, soil health, and the effects of a heavy reliance on toxic chemicals have driven the popularity of regenerative agriculture which aims to restore and replenish soil health.

Dairy and livestock producers are among the early adopters and are bringing a highly visible sustainability message to shoppers and retailers.

+1304.5%	+133.1%	+76.8%
Refrigerated Yogurt	Milk	Refrigerated Eggs



Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23
Powered by SPINS Product Intelligence: Certified Regenerative Organic

Dairy & Plant-Based Yogurt

Both traditional and plant-based segments continue to show strong growth, but inflationary pressures are pushing units into negative territory

Performance Ranked by Volume

Product Type	Sales	$ Growth YoY
Yogurt	$3.9B	13.2%
Yogurt - Greek	$3.8B	12.2%
Private Label	$734M	14.0%
Yogurt - Australian	$224M	3.8%
Plant-Based Yogurt - Coconut	$206M	12.2%
Yogurt – Skyr/Icelandic	$201M	10.2%
Yogurt - Kefir	$143M	17.7%
Plant-Based Yogurt - Almond	$87M	-8.2%
Plant-Based Yogurt - Soy	$52M	3.1%
Plant-Based Yogurt - Cashew	$36M	19.1%
Plant-Based Yogurt - Oat	$12M	-30.2%
Yogurt - Lassi	$2M	17.4%

Growing Preferences:

Attribute	YoY $ Growth
Sweetener: Allulose	+363.80%
Labeled Grain Free	+45.9%
Keto Diet	+23.5%

Growing Trends:

Flavor	YoY $ Growth
Cookies & Cream	+55.0%
Pear	+32.4%
Smores	+29.0%

Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23
Powered by SPINS Product Intelligence: Product Type and Flavor

Yogurt Brands continue to evolve

Consumer sensitivities around diet, sustainability, and expanded flavor profiles provide a rich area for brands to respond to shoppers' values-oriented preferences.

DAIRY FREE + KETO
Plant Based Yogurt - Coconut

+459.2%

BEYOND ORGANIC
Yogurt - Kefir

+198.9%

GLOBAL FLAVORS
Yogurt - Lassi

+106.6%

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

Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23

Creams & Creamers

[indulgences regardless if you’re shopping traditional or plant-based options]

Dairy Creamers

$ Growth YoY: **14.1%**

Unit Growth YoY: **1.7%**

Plant-Based Creamers

$ Growth YoY: **28.1%**

Unit Growth YoY: **15.0%**

Top Growth Segments for Creams & Creamers

Trending Attributes	$ Growth YoY	Unit Growth YoY
Ingredient – Hemp Seed	117.2%	116.3%
Major 9 Allergen Free	64.7%	50.0%
Ingredient – Whole Grain 1st	61.1%	47.0%
Paleo Positioned	49.2%	40.5%
Raw Positioned	37.5%	33.8%
Labeled Vegan	20.3%	7.2%
Labeled Gluten Free	18.1%	2.5%
No Added Hormones	12.0%	0.9%
Labeled Non-GMO	14.2%	0.1%
Antibiotic Free	6.9%	-3.0%

Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23

Meat Alternatives

NEW PRODUCT FORMS EXPANDS THE CATEGORY

Innovation in product forms provide plant-based curious consumers an alternative to traditional protein segments

Fillets & Steaks

$ Growth YoY
221.0%

Unit Growth YoY
198.9%

Shreds & Pulls

$ Growth YoY
68.6%

Unit Growth YoY
69.7%

Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23
Powered by SPINS Product Intelligence – Product Type

Center Store and Frozen

Nutrition & Ways-of-Eating Driving Center Store Innovation

Shoppers will find extra value and invest in products that innovate with BFY nutrient profiles

Keto Diet Friendly:

Category Examples	YoY Growth
SS. COLD CEREALS	47.7%▲
FZ. APPETIZERS & SNACKS	20.3%▲
BREAD & BAKED GOODS	16.3%▲

Protein Packed (15+g):

Category Examples	YoY Growth
SS. HOT CEREALS	159.9%▲
SS. COLD CEREALS	35.6%▲
BREAD & BAKED GOODS	26.1%▲

Nutrition basics such as less sugar/carbs, more protein, and a focus on clean label ingredient profiles will be feature tenants across center store categories

Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23

Plant Forward Ingredients

Plant Forward Ingredients that help promote BFY concepts and nutrient density continue to impact pockets of the center store

WHOLE BEAN
Pizza Curst & Focaccia

+79.7%

WHOLE GRAIN 1ST INGREDIENT
Fz Waffles

+21.8%

WHOLE CAULIFLOWER
Tortillas & Flat Breads

+27.7%

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

Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23

Superfoods Performing Well Across Center Store

Elevated **micronutrient** profiles sourced from a range of superfoods continue to leave an impression on shoppers across a wide range categories.

Ancient Grains:

Cateogry	YoY $ Growth
Frozen Desserts	+33.8%
Shelf Stable Pasta	+24.9%
Shelf Stable Baking & Flour	+12.1%

Super Greens:

Flavor	YoY $ Growth
Refrigerated Condiments	+57.9%
Shelf Stable Entrees & Mixes	+54.0%
Baby & Toddler Food	+18.4%

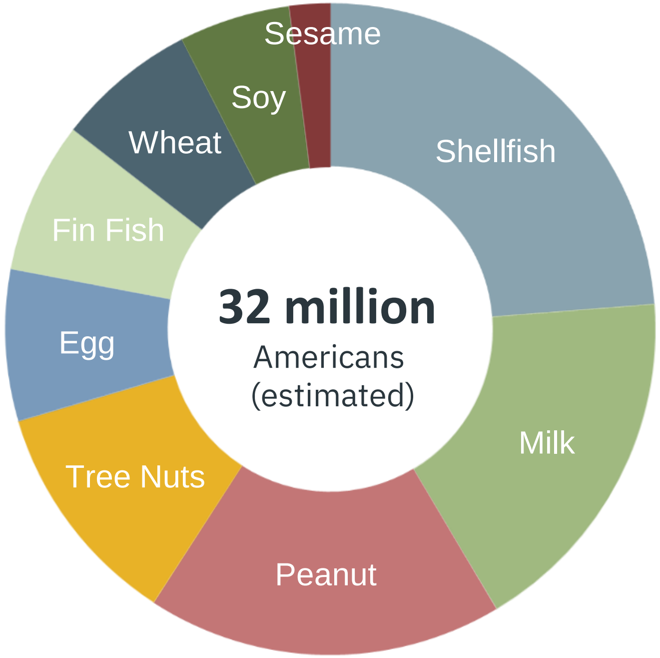
* % Represents Dollar % Change YoY (vs same time LY)

Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23

Allergen Awareness and Inclusion on the Rise in Center Store

Brands and Retailers are recognizing key white space opportunities to bring allergen & sensitivity free foods to more categories. With food allergies on the rise, it is critical that shoppers are given holistic shopping options and are able to easily locate them across the store.

How many people have food allergies?



https://www.foodallergy.org/resources/facts-and-statistics

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

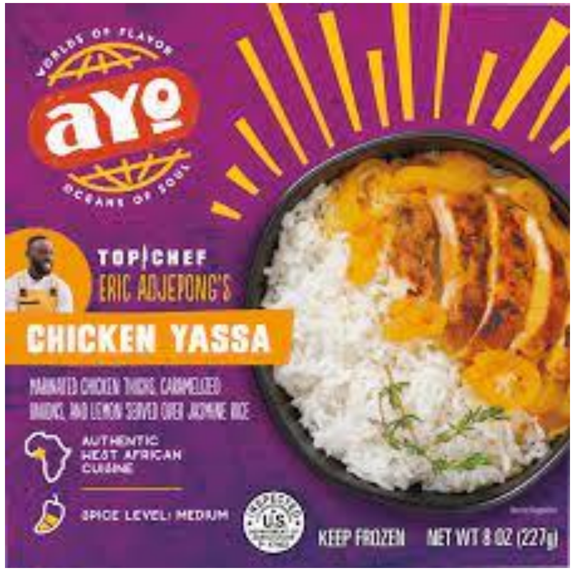
Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23

International Meal Solutions

Emerging International brand profiles are disrupting meal, sauces, & appetizer categories as shoppers continue to clamor for diverse and/or familiar at-home meal solutions.

Emerging International Groupings

International	Sales	%growth YoY
Hispanic / South Am – Colombia	$0.2m	+202.3%
Africa – General	$3.0m	+103.1%
Hispanic / South Am – Venezuela	$0.3m	+71.1%
Hispanic / South Am – Guatemala	$1.1m	+64.1%
Asia – Korea	$103.4m	+48.2%
Hispanic / South Am – Uruguay	$0.2m	+43.8%
Mid East / Meditrn – Lebanon	$1.0m	+30.7%
Hispanic / South Am – Costa Rica	$0.3m	+29.7%
Asia – India	$192.8m	+25.6%
Hispanic / South Am – General	$252.8m	+23.4%

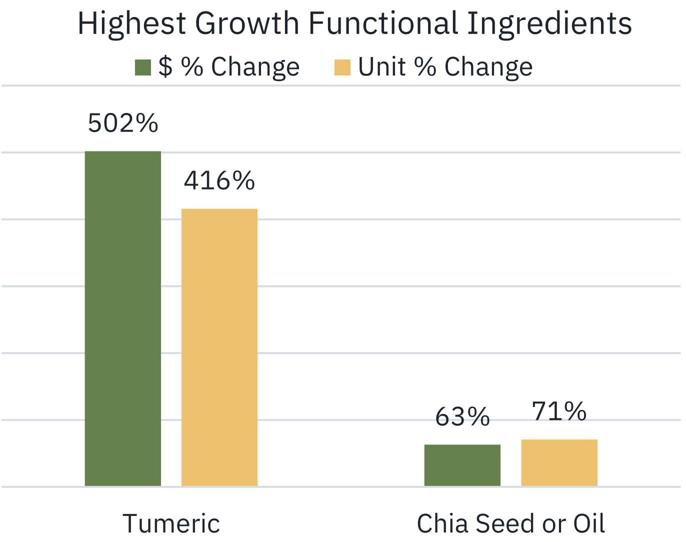


Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23

CENTER STORE

Center store continues to meet shoppers on their wellness & sustainability journeys

Promising Pastas



Fats & Oils

Cold Pressed

$ Growth YoY
16%

Unit Growth YoY
12%

Alternative Blends & Bases

Unique Flavors

Upcycled Emerging

UP CYCLED CERTIFIED

+5% vs 2022!

Booth #N1330

Booth #903

Booth #N1313

Booth #8216

Booth #N444

Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23
Powered by SPINS Product Intelligence: Natural Product Universe

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VMS & Body Care

PERSONAL CARE

Specialty & Wellness and Natural Products Fairing Better To Inflationary Market

Category Growth	Conventional Products			Specialty & Wellness Products			Natural Products		
	$ Volume	$ % Chg	Unit % Chg	$ Volume	$ % Chg	Unit % Chg	$ Volume	$ % Chg	Unit % Chg
Hair Care	$9B	1%	-7%	$934M	3%	-5%	$1B	16%	10%
Cosmetics & Beauty Products	$8B	7%	-1%	$271M	-1%	-2%	$123M	-7%	-8%
Oral Care	$8B	0%	-5%	$267M	14%	8%	$336M	39%	28%
Soap & Bath Preparations	$5B	4%	-10%	$528M	15%	0%	$1B	15%	3%
Face Care	$4B	8%	0%	$368M	15%	7%	$698M	5%	-4%
Deodorants & Antiperspirants	$3B	15%	-1%	$166M	36%	20%	$382M	31%	16%
Shaving & Hair Removal	$3B	0%	-7%	$667M	5%	0%	$110M	45%	31%
Skin Care	$2B	2%	-7%	$141M	12%	3%	$173M	6%	-1%
Sun & Insect Protection	$1B	0%	-6%	$126M	14%	3%	$269M	12%	4%
Body Fragrances & Perfumes	$470M	2%	-6%	$323M	-3%	-3%	$24M	49%	55%
Body Care Kits	$253M	-6%	-13%	$90M	14%	9%	$34M	-12%	-16%
Aromatherapy & Body Oils	$241M	-7%	-14%	$22M	16%	12%	$157M	-6%	-10%

Source: SPINS Natural Channel, MULO (powered by IRI), 52 Weeks Ending 1/29/23
Powered by SPINS Product Intelligence: Positioning Group

Simplified Skincare & Social Media Reign Supreme

Skinimalism Superstars

skin-i-mal-ism: simplified skin care regimens that help achieve healthy, glowing skin with only the necessary amount of products.

Skin-Benefitting Makeup

1-3 Step Regimens

Influencers

- **86%** YouTube top 200 beauty videos were created by users, not brands
- Overall, there were **2x more creator posted videos** vs YA
- **76% of Gen Z** purchase from creators
- **Gen Z ranks influencers as most trusted** to help with purchase decisions – beating social media ads & celebrities
- **2/3rds of** TikTok **1B active user base is Gen Z**, and 90% would rather spend on skincare vs makeup.

Ingredient > Brand

Retinol, hyaluronic acid, niacinamide and vitamin C + **700%** in searches vs. 2020

www.forbes.com/sites/forbescommunicationscouncil/2022/02/15/why-social-media-marketing-will-only-become-more-popular-in-the-beauty-industry-in-2022, LTK REPORT: The State of Creator Guided Shopping, https://fanbytes.co.uk/skinfluencers-on-tiktok/

PERSONAL CARE

Trending Wellness Ingredients & Added Functionality

2022 Top Searched Skincare Ingredients

Rank	Ingredient	TikTok Views
1	Salicylic Acid	415 M
2	Collagen	2.2 B
3	Retinol	2.8 B
4	Hyaluronic Acid	599 M
5	Vitamin C	2.3 B

Natural Deodorants Stepping Up

Natural Deo

$ Growth YoY	Unit Growth YoY
31%	**16%**

Natural Slow Hair Growth

Skin Brightening

Skin-Boosting Natural Ingredients & Anti-Antioxidants

Thoughtful Toothpaste Focuses

Pregnancy

Immunity

Anti-Aging

Prebiotic

Caffeine & Nootropics/ Melatonin & Supplements

Sources: https://procollective.co.nz/the-top-skincare-ingredients-and-trends-of-2022/
Source: SPINS SNE + MULO (powered by IRI), 52 Weeks Ending 1.29.23
Powered by SPINS Product Intelligence: Natural Product Universe

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

Natural Channel 52 Weeks Ending 12/04/2022 vs Prior Year

+18%
$ % Growth vs Year Ago

Quercetin
Cardiovascular Support, Allergy & Respiratory

+15%
$ % Growth vs Year Ago

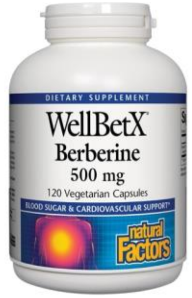
Lions Mane*
Cognitive Health

+14%
$ % Growth vs Year Ago

N-Acetyl Cysteine
Immune Health

+24%
$ % Growth vs Year Ago

Barberry
Blood Sugar Support

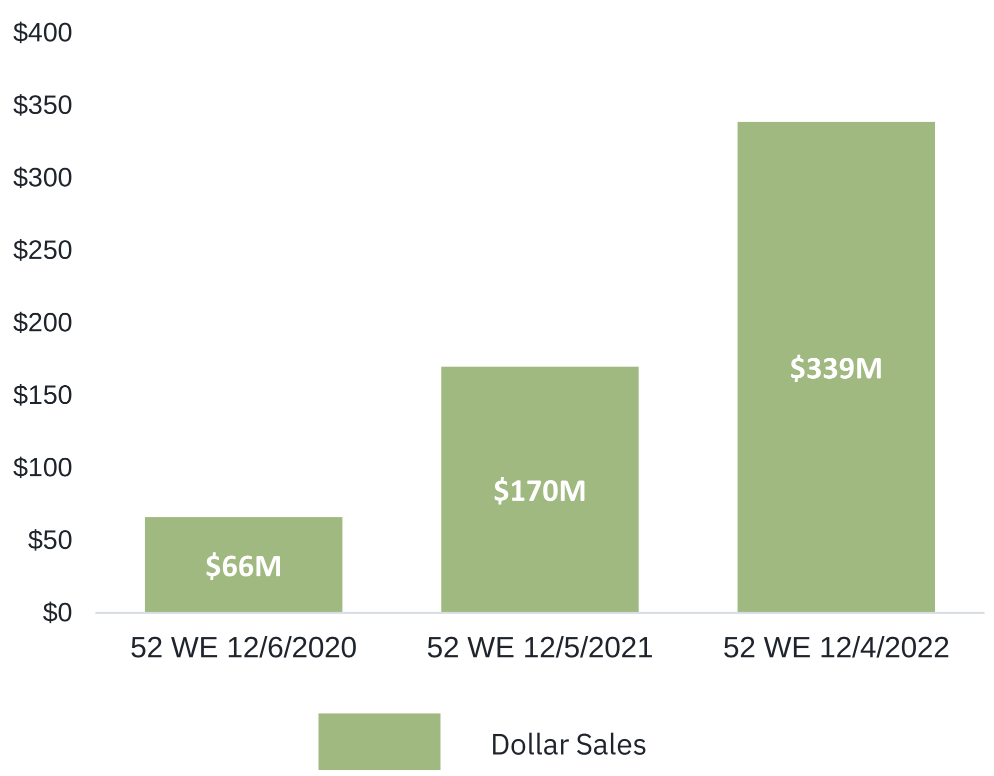


Source: SPINS Natural Channel, 52 Weeks Ending 1/29/23
Ingredients with >70% sales and >$500K in absolute $ growth vs YA

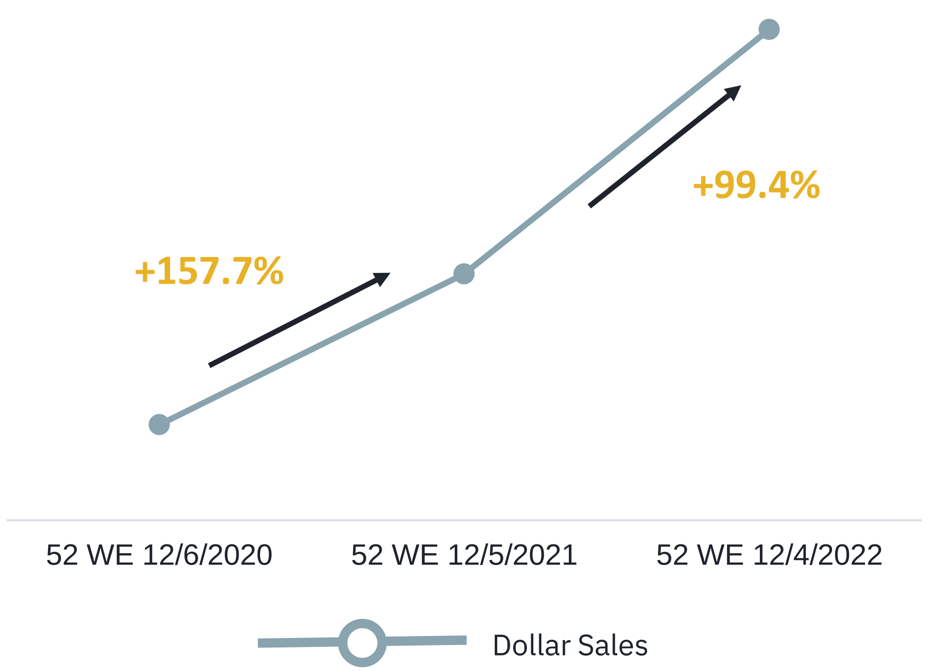
Hydration & Electrolyte

Three-Year Trend Insights

Sales Volume Growth (in Millions)



YoY Dollar Growth Rate



SPINS: Natural Enhanced Channel & Conventional Multi-Outlet (powered by IRI); 52 Weeks Ending 12.4.2022

Hydration & Electrolyte

Younger shoppers are behind the growth in the category

161
Millennials – Younger
(Born 1990-1996)

128
Millennials – Older
(Born 1981-1989)

127
Gen X
(Born 1965-1980)

*Boomers and Seniors under-indexed in this category at <69 points

Whey Protein Powder is driving the most sales

Plant-Based Protein Powder is Growing the Fastest

Fastest Growing!

SOURCE	MARKET SHARE	YOY GROWTH
Whey	35%	+13%
Collagen	29%	+2%
Plant	17%	+1%
Blend	11%	-1%
Casein	2%	+8%

#1

SPINS ClearCut Amazon US Channel Data | Ending 12.4.2022

Parents are focused on Cold & Flu, Sleep, Immune, & Mood Support supplements when shopping for their children

Children's Supplements Health Focus $ Share

-0.5% Children's Supplements $ Growth YoY

+1.3% COLD & FLU

+3.2% SLEEP

+4.5% DIGESTIVE HEALTH

+65.3% IMMUNE HEALTH

+32.6% MOOD SUPPORT

Cold & Flu, Sleep, and Digestive Health supplements make up 52% of overall Children's Supplements

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

Source: Natural Enhanced Channel & Conventional Multi-Outlet (powered by IRI)
Department: Vitamins & Supplements, Category: Other Supplements, Subcategory: Children's Supplements, Attribute: Health Focus
52 Weeks Ending 1/1/23

Woman's supplements growth driven by **Urinary Tract, Digestive Health, Reproductive Health, and Hair, Skin, & Nails products**

Women Specific Supplements Health Focus $ Share

-2.6% Women Specific Supplements $ Growth YoY

-5.1% PRE/POSTNATAL	
-19.7% Menopause	
+19.1% DIGESTIVE HEALTH	
+39.4% REPRODUCTIVE	
+16.0% HAIR, SKIN & NAILS	

Reproductive, Digestive health and Hair, Skin & Nails supplements are growing fastest vs YAGO

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

Source: Natural Enhanced Channel & Conventional Multi-Outlet (powered by IRI)
Department: Vitamins & Supplements, Gender: Woman Focused, Attribute: Health Focus
52 Weeks Ending 1/1/23

Picks: **Plant & Protein**

CHKP Foods
CHKPfoods.com

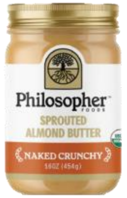
Churn
churnfoods.com

Meati
meati.com

Akua
akua.co

Picks: **Center Store**

Bare Bones
barebonesbroth.com



Philosopher
philosopherfoods.com

All Clean Food
allcleanfood.com

Gotham Greens
gothamgreens.com

Vista Hermosa
vistahermosaproducts.com

Kooshy
kooshy.com

Brands To Watch

Milk

Brand	Booth #
Alexandre Family Farm	N536
A2 Milk	N829
Califia Farms	931
Bored Cow	N124
Milkadamia	N1023
Malibu Mylk	5483

Center Store

Brand	Booth #
Al dente Pasta Company	N724
Fiber Gourmet	N2015
GUUD Modern Cereal	N229
Stoked Oats	N838

Snacks

Brand	Booth #
Baja Vida Snacks	N935
Abe’s Vegan Muffins	N1817
Covered Bridge Potato Chip Company	5614

Cheese

Brand	Booth #
Cheese Bits	5635
Truly Grass Fed	2083
Nuts for Cheese	5470
Naera Icelandic Snacks	N1407
Whisps	N2300

Yogurt

Brand	Booth #
AYO Almond Yogurt :	2656
Siggis Dairy	5449
Pillars Yogurt	5717
Ellenos	N932
Oddly Good	N346
St. Benoit Creamery	1769

Plant Based Meats

Brand	Booth #
Before the Butcher	1674
Noble Jerky	N2206
Actual Veggies	N1143
Plant Boss	2617
Plant Plus Foods	4608

Beauty

Brand	Booth #
Attitude	2631
Evanhealy	2882
Nfuse LLC	8712A
Spinster Sisters Co:	N1711

VMS

Brand	Booth #
4 Gauge Fitness	4184
OWYN	5716
AlaskOmega	3772
Mushroom pack: Clevr	Confirm

Beverage

Brand	Booth #
Centered	2780
Clean Cause	2782
Pop n Bottle	5170
Green Cola	N1652
Cherry Central	N1418
Chiki Chiki Boom Boom	5379
Garden of Flavor	5601
Gunna Craft Soda	5298
Mingle Mocktails	5580
Smart Juice	2110

Pet

Brand	Booth #
Bundle x Joy	N643
Portland Pet Food	N2039
Raw Farm	5590
The Bear and the Rat: Cool Treats for Dogs	N523

SPINS®

Thank you!

For more information, please reach out to growth@spins.com