

# State of the Industry

## Vitamins & Supplements + Sports Nutrition 2023



Inspiring the pursuit of wellness.





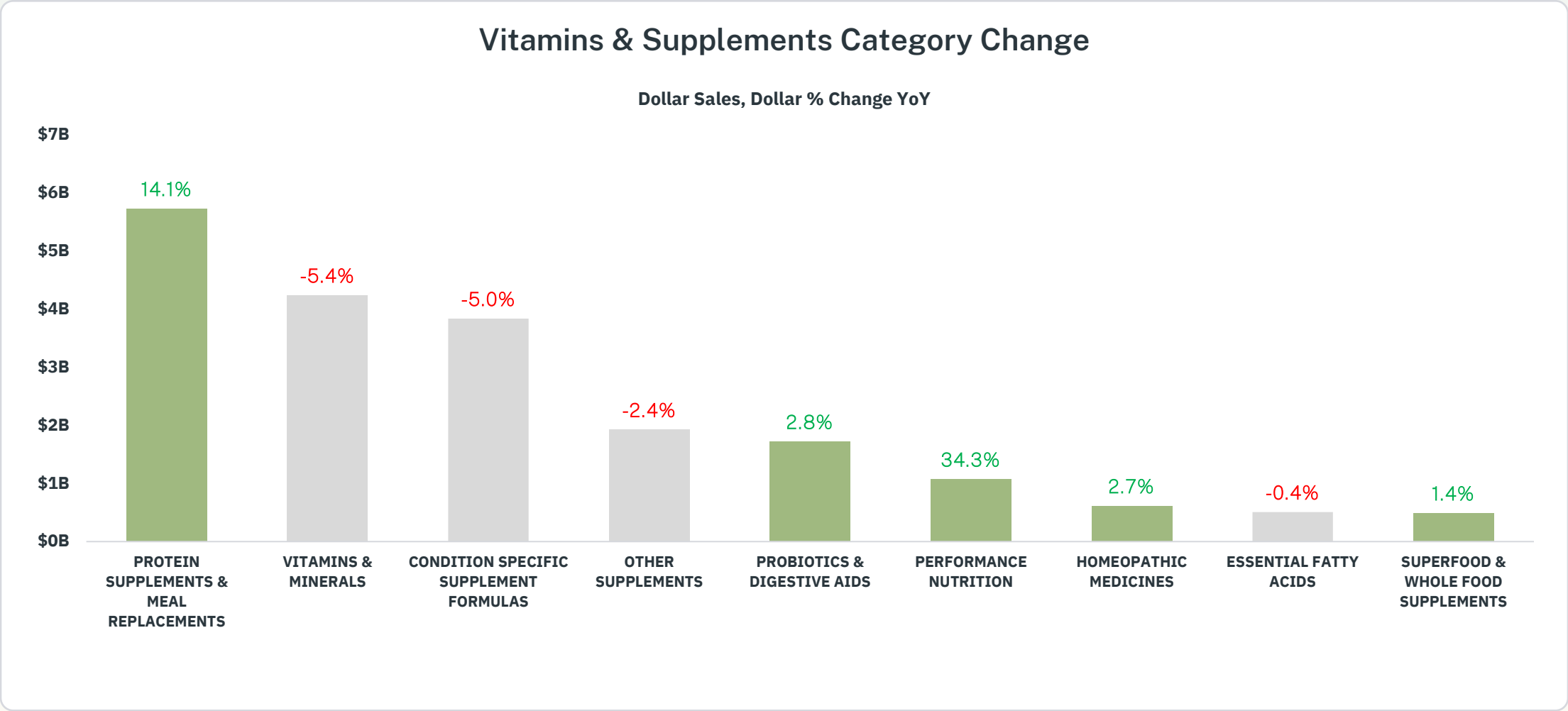
# Vitamins & Supplements

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# Key V&S Categories Continue to See Strong Growth in 2023

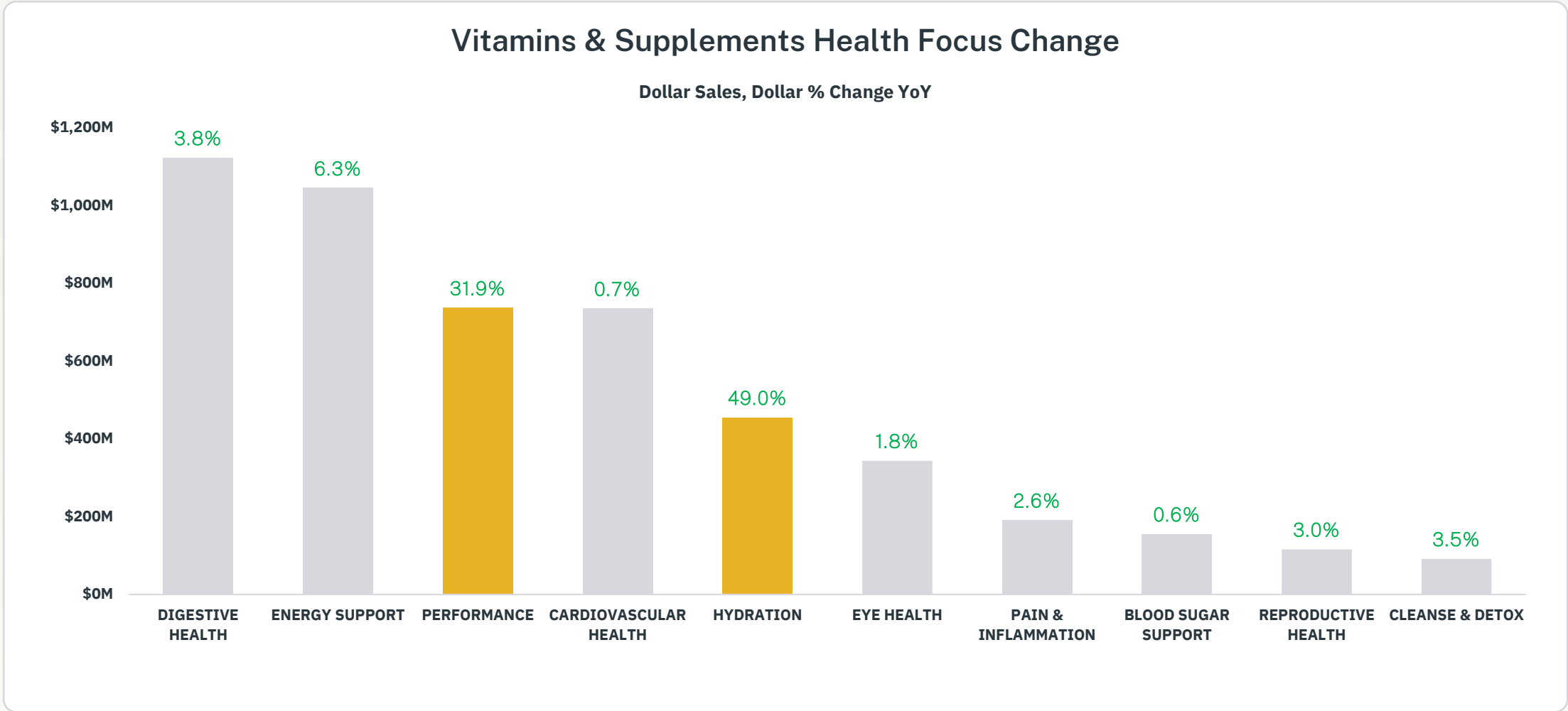
Protein Supplements & Meal Replacements and Performance Nutrition categories are driving **double-digit growth** in the VMS space.



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

# Shoppers Are Looking to Supplement Key Health Focus'

Shoppers are purchasing supplements in key health focus', with **Performance and Hydration** products **growing double-digits** in sales dollars in Vitamins & Supplements.

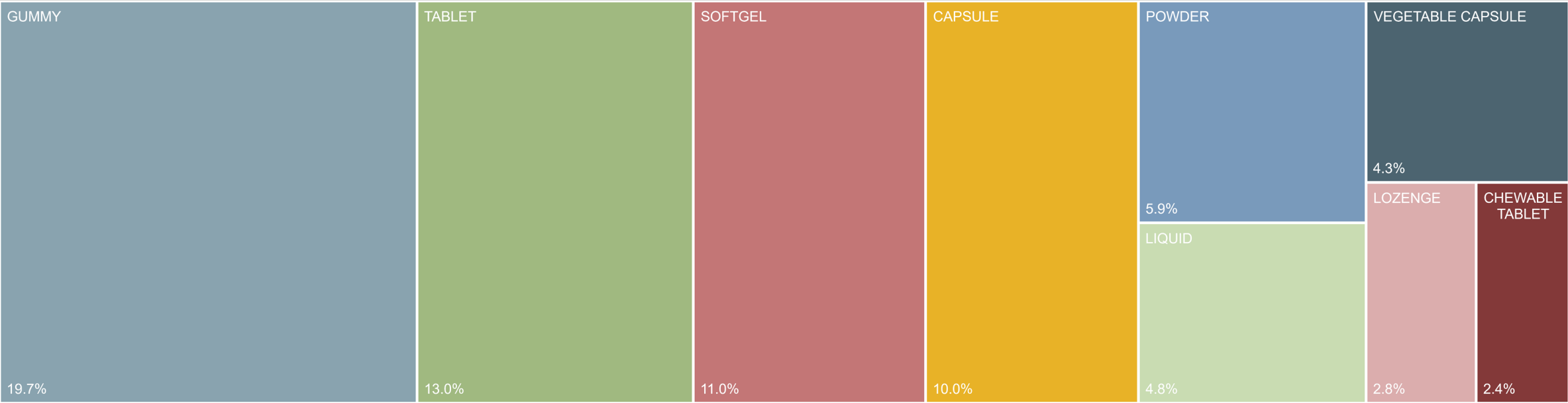


\* % Represents % Change YoY (vs same time LY)

# Top Product Forms in Vitamins & Supplements

**Liquid forms** saw slight growth in dollars in the latest 52 weeks, with all forms declining in unit sales.

Top Product Forms by Dollar Share



Dol % Chg:	-5.5%	-5.2%	-1.7%	-2.8%	-1.3%	+2.2%
Unit % Chg:	-10.2%	-13.4%	-8.1%	-7.1%	-13.0%	-5.3%
Form:	GUMMY	TABLET	SOFTGEL	CAPSULE	POWDER	LIQUID

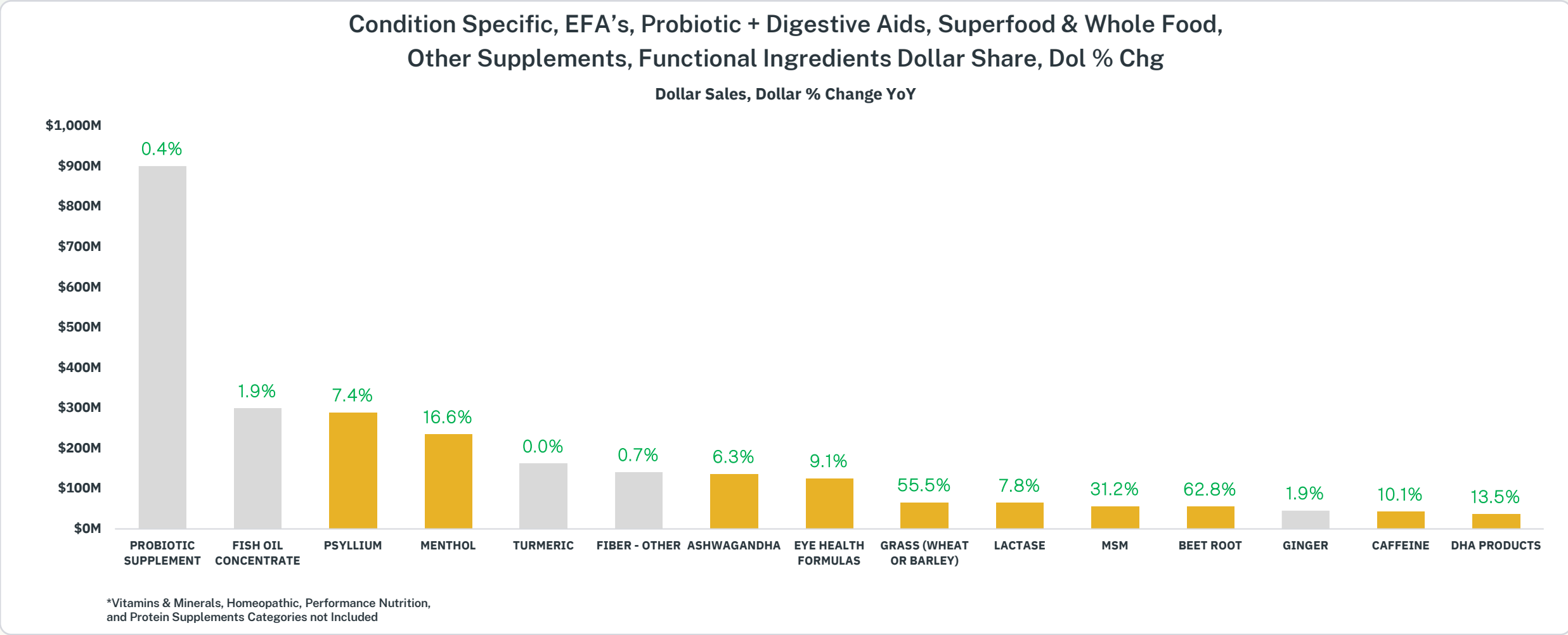
\*Protein Supplements and Performance Nutrition Categories not Included

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



# Functional Ingredient Growth in Vitamins & Supplements

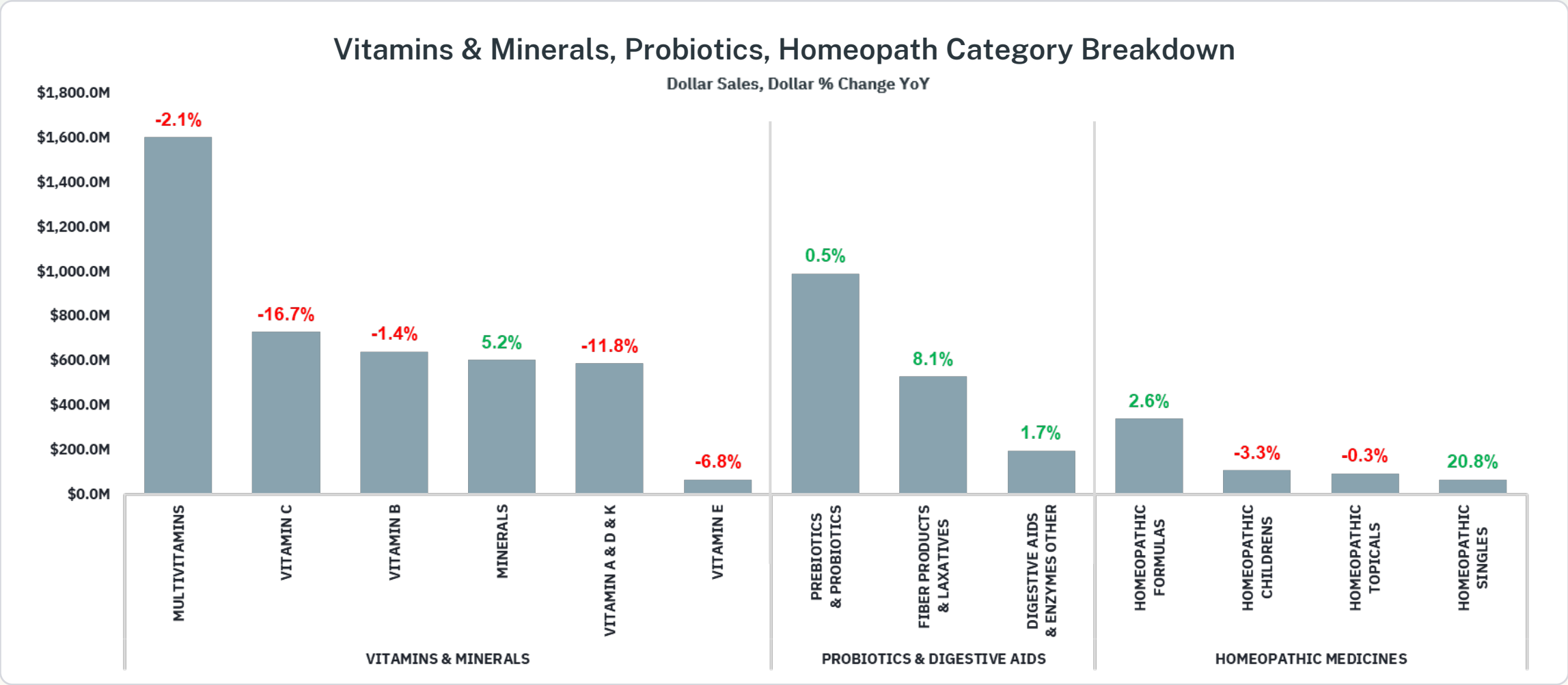
Some of the fastest growing functional ingredients cover immunity, digestion, energy, and cognitive health.



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

# Vitamins & Minerals, Probiotics, Homeopath Subcategory Drivers

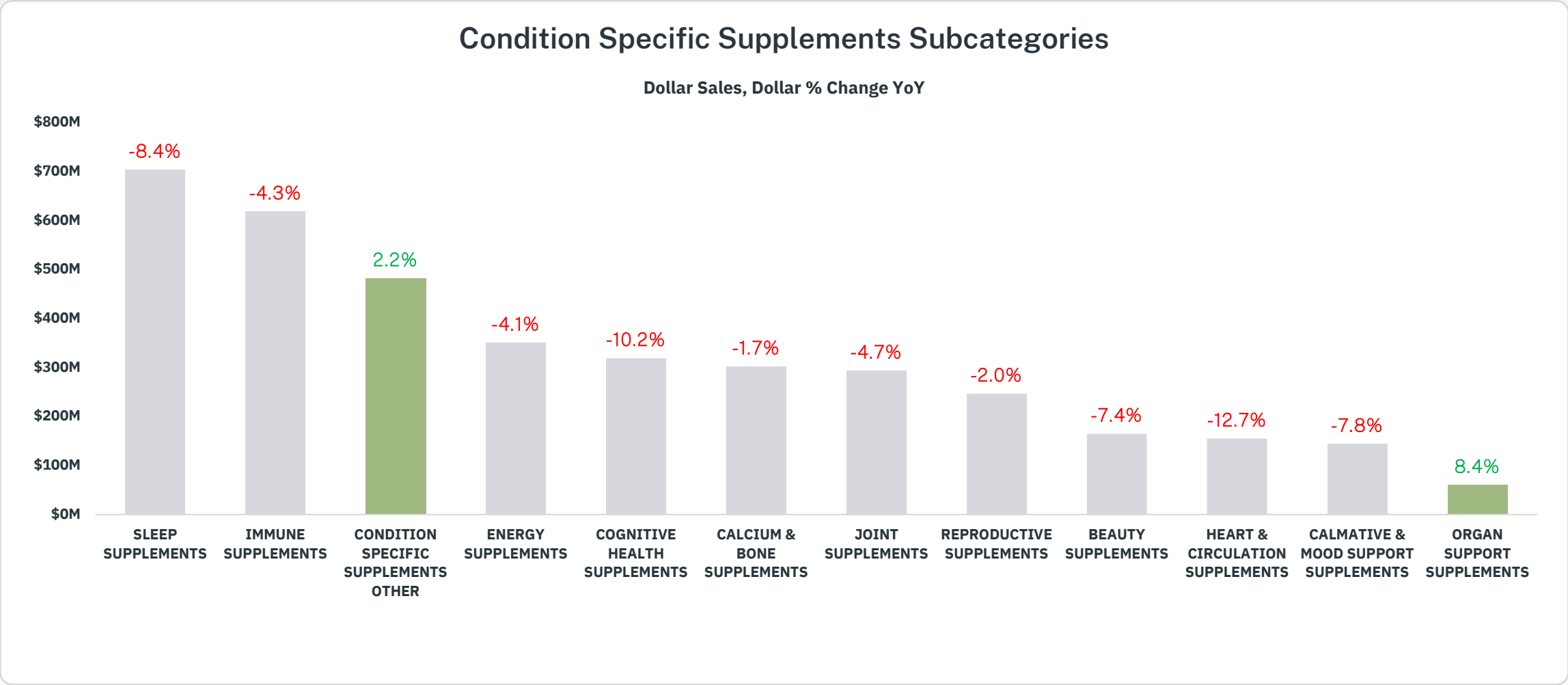
While most of Vitamins & Minerals were trailing vs YAGO, **Minerals grew +5.2%**, while all subcategories in **Probiotics** grew in the latest 52 weeks. **Homeopathic Formulas and Singles** also contributed to category growth.



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

# Condition Specific Supplements Subcategories

While the entire Condition Specific category may be down -5.0%, **Organ Support Supplements** reported **growth of +8.4%** in the latest 52 weeks.

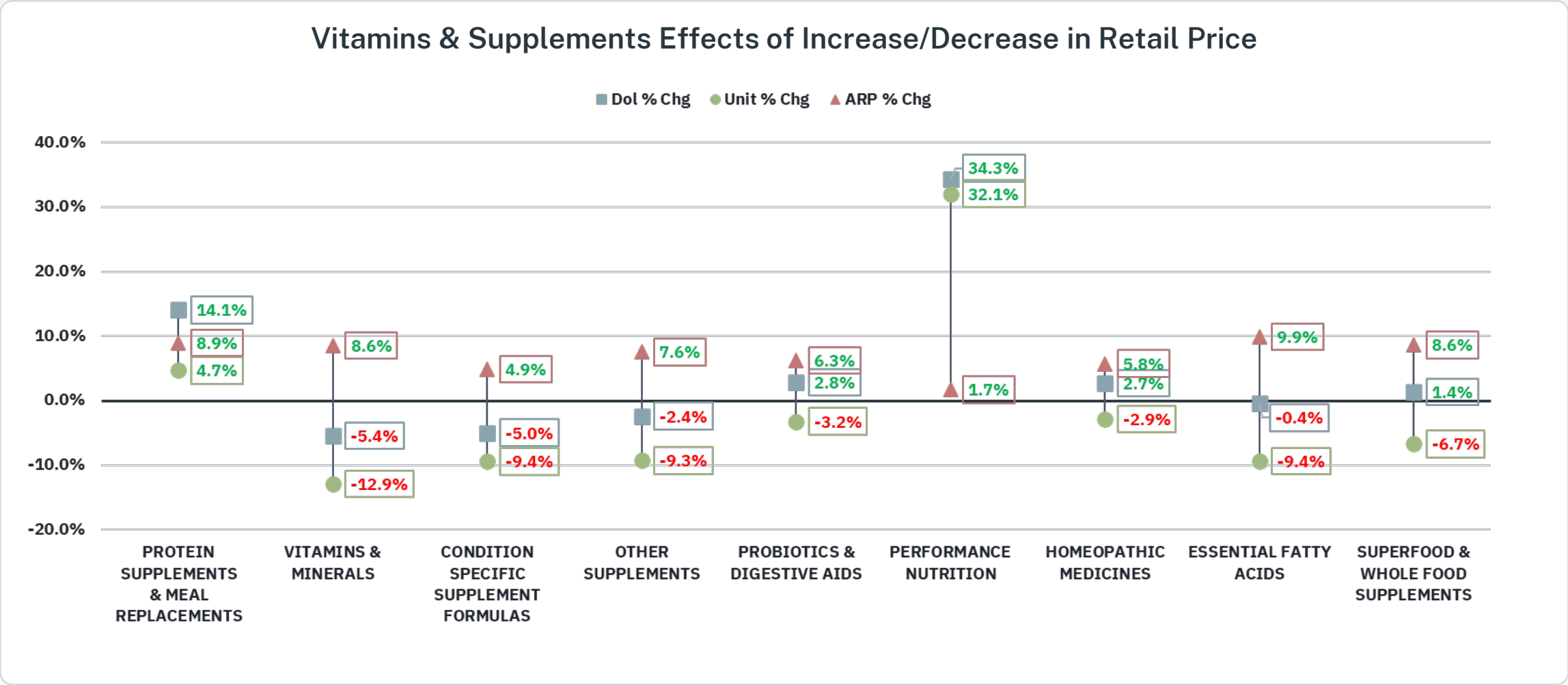


\* % Represents % Change YoY (vs same time LY)



# Inflationary Squeeze in the VMS Market

Performance Nutrition saw the smallest increase in retail price, with dollar and unit sales growing >30% YoY.



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



# Women's Health

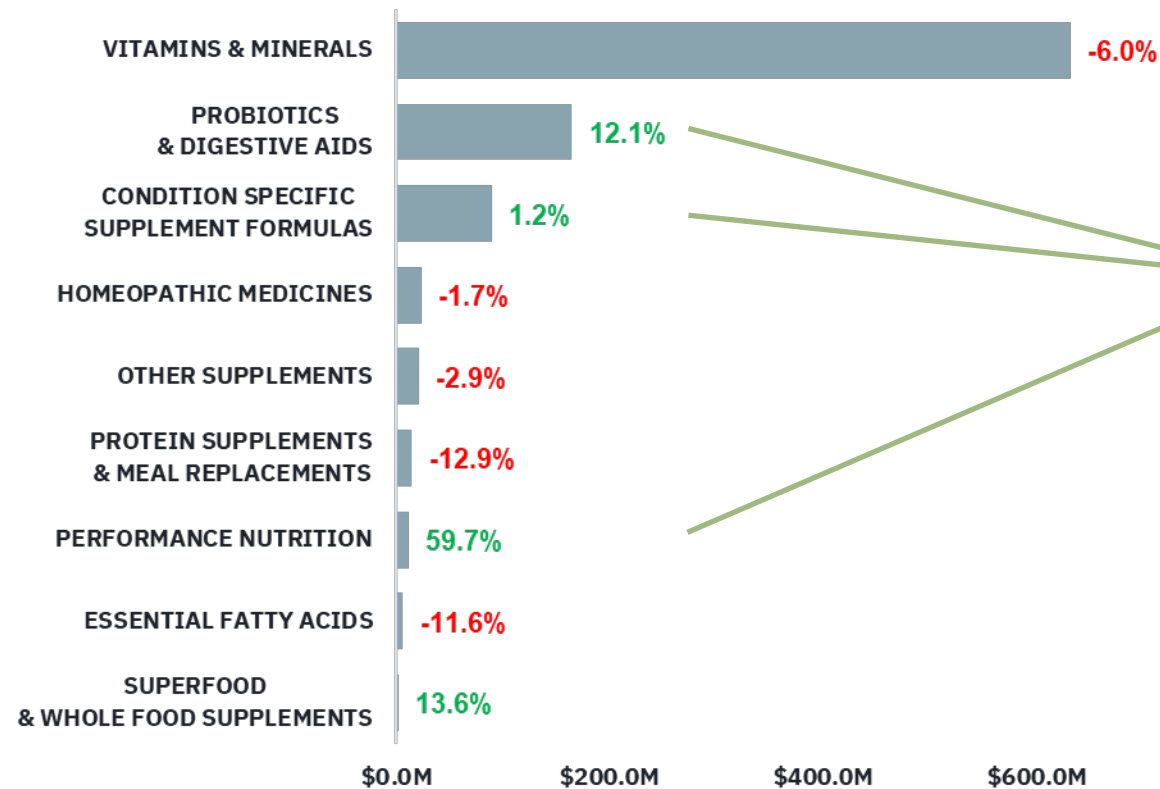
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# Growth in Women's Health Categories Focused on Key Areas

Woman's supplements growth driven by **Digestive Health, Urinary Tract Health, Reproductive Health, and Bone Health products.**

Women Specific Category \$ Share



## -2.1% Women Specific Health Focus \$ Growth YoY

+27.2% DIGESTIVE HEALTH

+3.8% URINARY TRACT

+4.5% REPRODUCTIVE

+3.2% BONE HEALTH

-3.9% PRE/POSTNATAL

-9.0% MENOPAUSE

-10.3% ENERGY SUPPORT

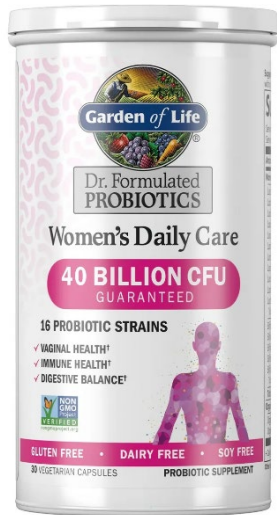
Digestive Health, Urinary, Reproductive, & Health and Bone Health supplements are growing fastest vs YAGO

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

# Women's Health Category Growth Drivers

Women's Health products in categories including **Probiotics**, **Condition Specific**, **Performance**, and **Superfoods** reported growth in the latest 52 weeks.

## Probiotics & Digestive Aids



Garden of Life  
Women's Daily Care

## Condition Specific Supplements



Ollly - Happy Hoo-Ha  
Reproductive Care

## Performance Nutrition



Irwin Naturals  
Women's Fat Burner

## Superfood & Whole Food Supplements



Legendary Milk  
Sunflower Lecithin



# Sports Nutrition

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PRODUCT INTELLIGENCE INNOVATION INSIGHTS

# Performance Nutrition

Expanded Market to Women, Gen X, and Boomers

**129**

25–34yo Males



**117**

35–44yo Males

**137**

45–54yo Males

**122**

25–34yo Females

**119**

35–44yo Females

**130**

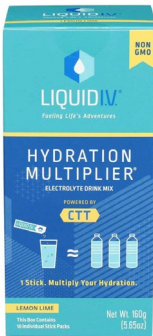
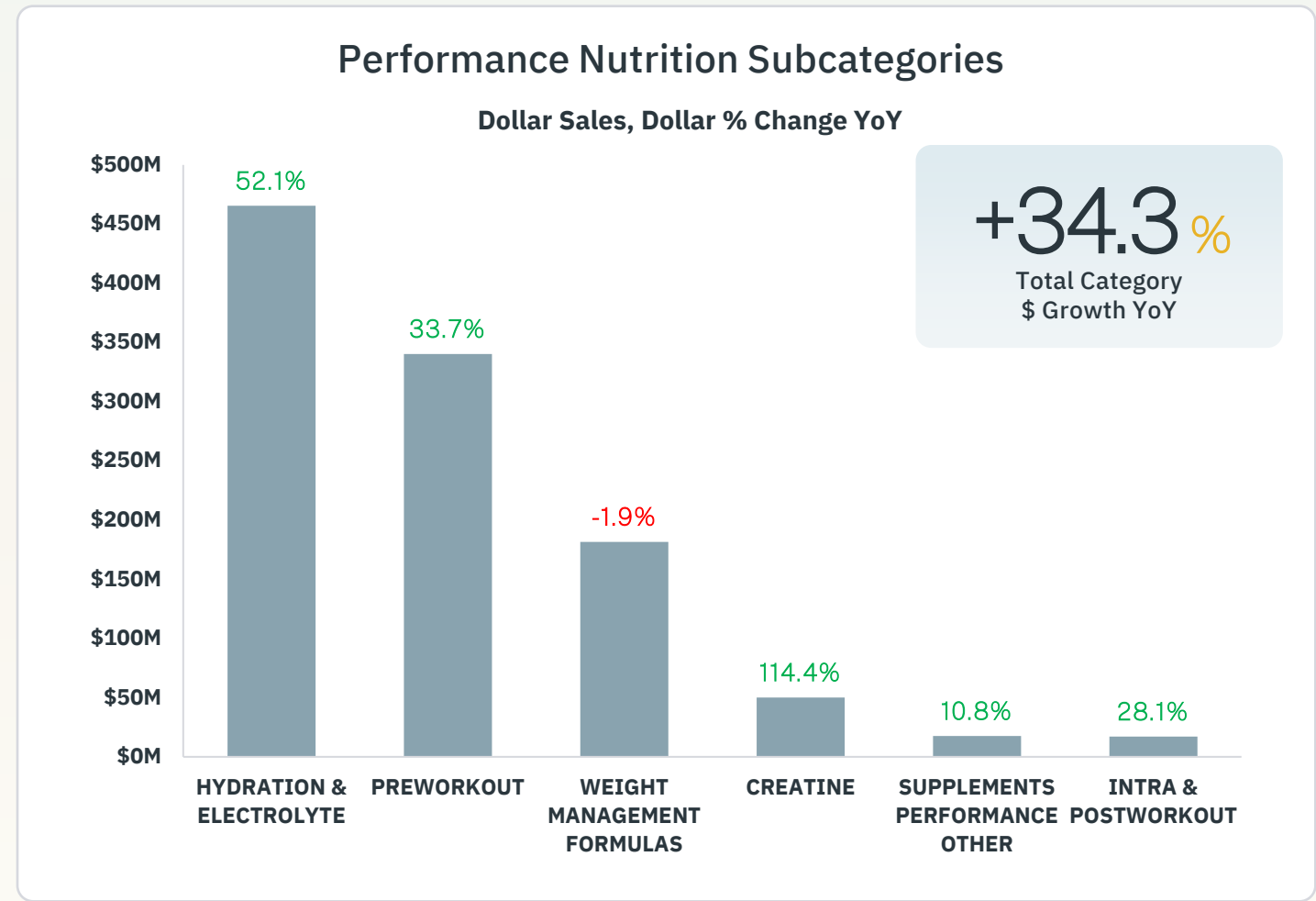
45–54yo Females





# Performance Nutrition Subcategory Growth

Performance Nutrition category growth driven by **Hydration & Electrolytes, Pre/Intra/Post-Workouts, and Creatine.**



Liquid IV  
Hydration Multiplier



Bucked Up  
Woke AF Pre-Workout



Sunwarrior  
Active Creatine



XTend  
BCAA's Post-Workout

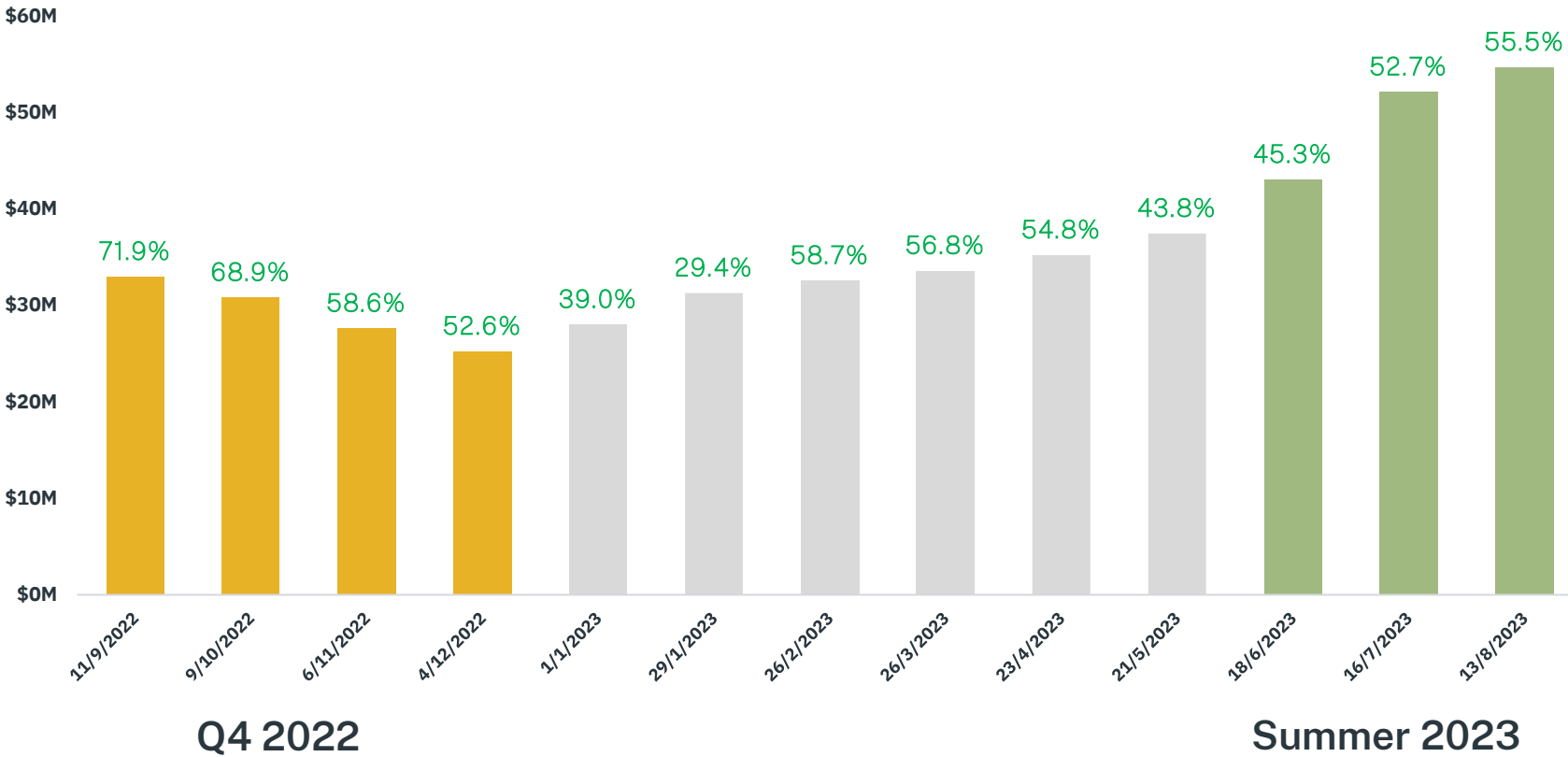
\* % Represents % Change YoY (vs same time LY)

# Hydration & Electrolytes Not Just For the Summer

Hydration & Electrolyte products may see its largest share of dollar sales during the hottest parts of the year, but growth has been >50% even during some of the cooler months.

Hydration & Electrolytes 13 Period Trend

Dollar Sales, Dollar % Change YoY



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

# 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

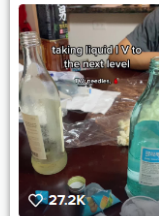
# Hydration for everyone, not just athletic people

Companies have expanded marketing for hydration to include more use cases

"We believe hydration is the bedrock of wellness, so our goal is to educate the nation that **hydration is for everyone**," said Stacey Andrade, vp of marketing at Liquid I.V.

Andrade noted **brands often position hydration in the context of competitive sports and high-intensity workouts**. Not only is that unhelpful, she explained, but Liquid I.V.'s research shows **consumers find the pairing unrelatable**.

"Now, more than ever, there's been this **return to playful activities and hobbies that all require hydration**," she added.

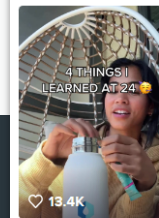


ja\_niceforwhat ja\_niceforwhat

get you a nurse bestie to **keep you hydrated while you're getting litty** (tiktok dont take this down) #fyp #liquidiv #liquidivpartner #ivtherapy

27.2K Likes, TikTok video from ja\_niceforwhat (@ja\_niceforwhat): "get you a nurse bestie to keep you hydrated while you're..."

659.5K views | Super Freaky Girl - Nicki Minaj



sophiacuerquis Pia

4 things I've learned at 24, **while staying hydrated with @Liquid I.V. after a weekend of celebrating** ✨ Use code: SOPHIACUERQUIS #liquidiv #ad

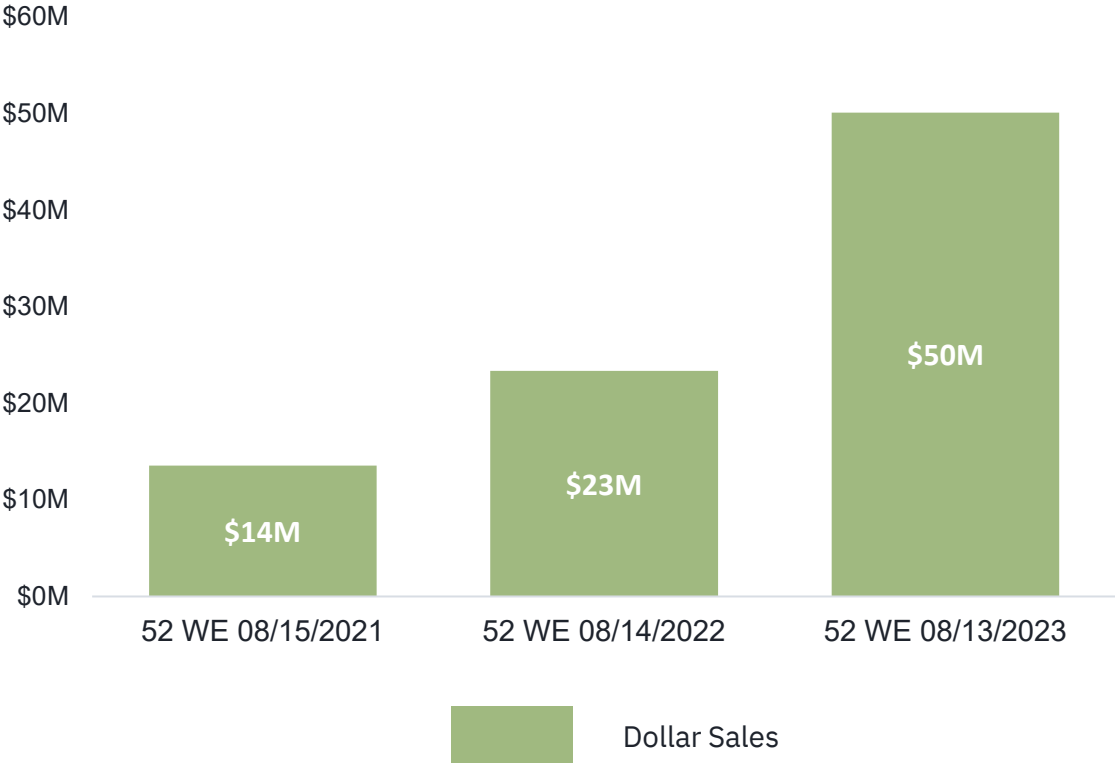
13.4K Likes, 102 Comments. TikTok video from Pia (@sophiacuerquis): "4 things I've learned at 24, while staying hydrated with..."

2M views | Aesthetic - Tollan Kim

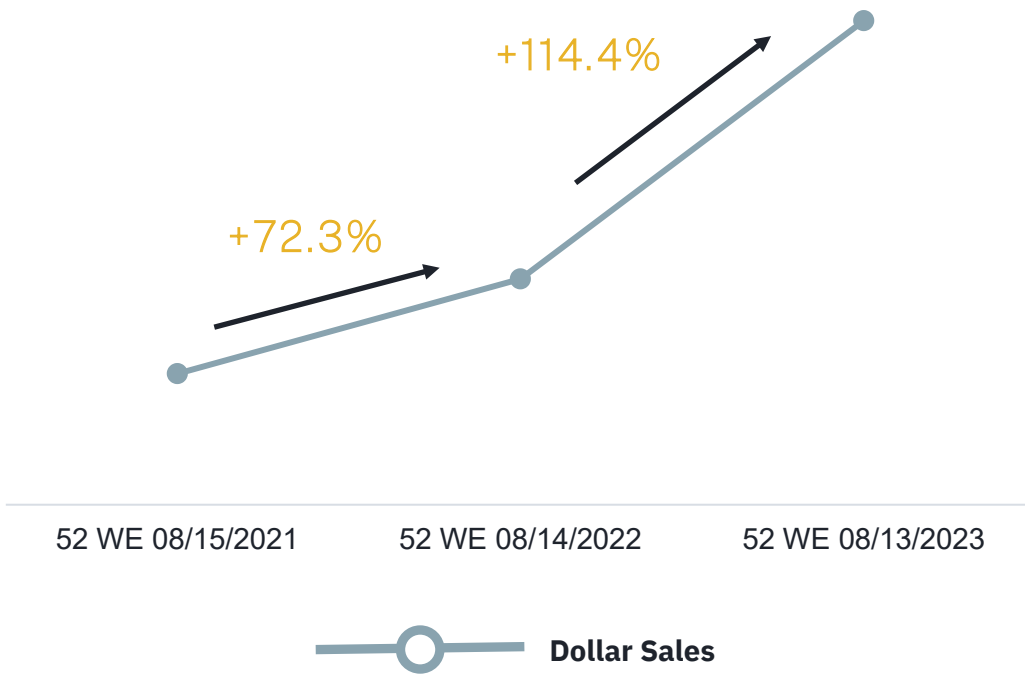
# Creatine Performance

## Creatine 3 Year Trend Insights

Dollar Sales (in Millions)



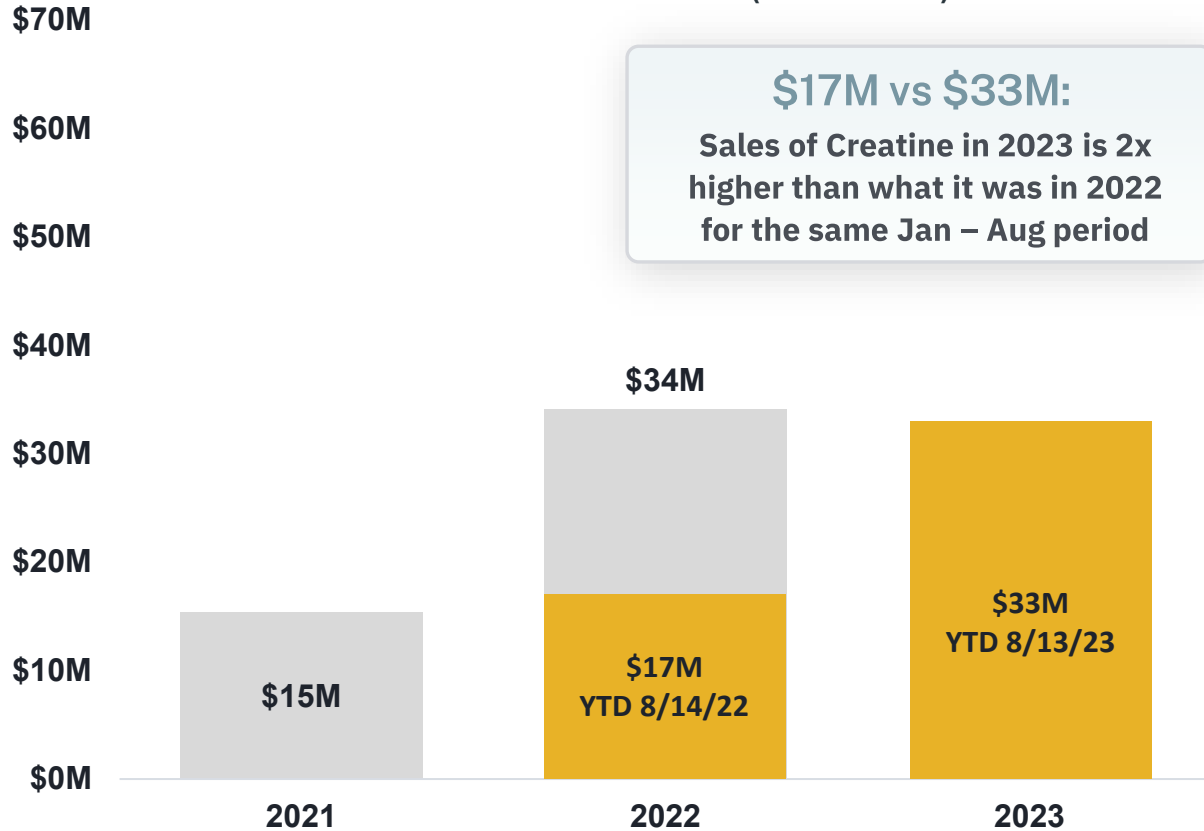
YoY Dollar Growth Rate



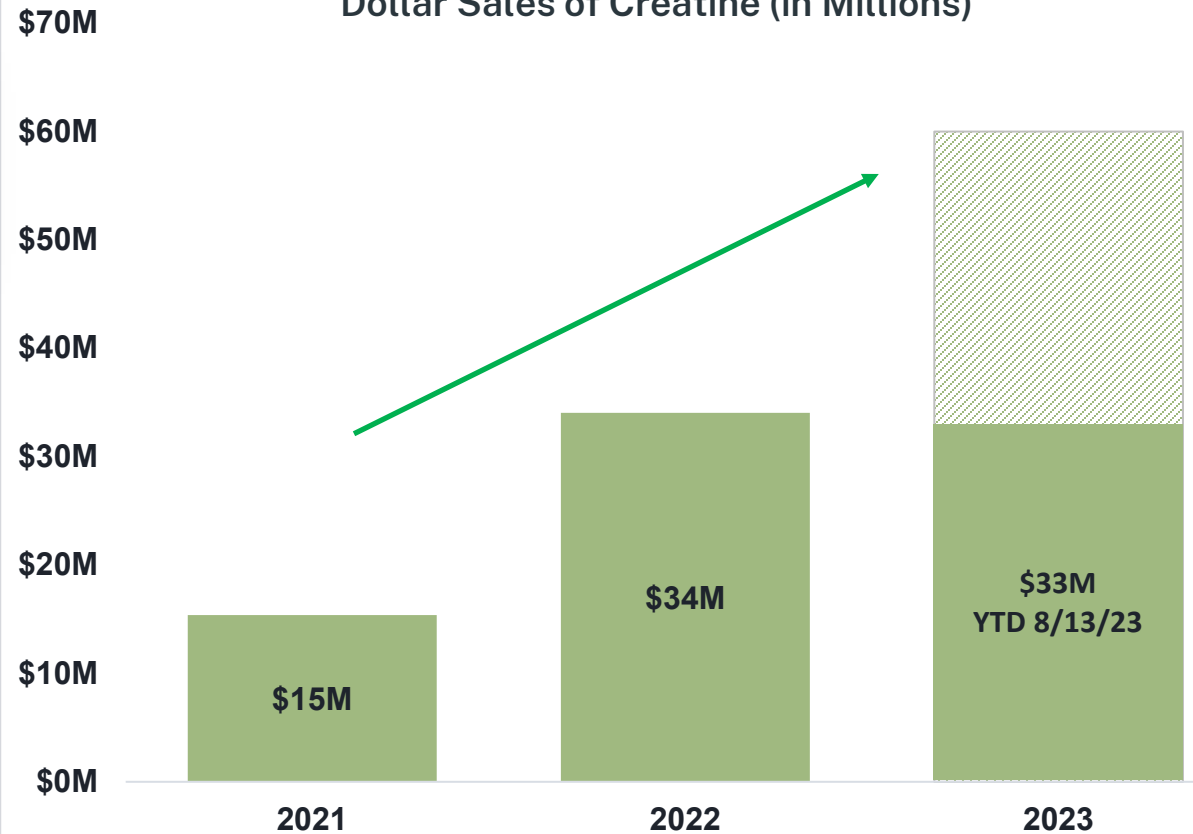
# Creatine Performance

## Creatine 2023 Sales & Growth Projection

Dollar Sales of Creatine (in Millions)



Dollar Sales of Creatine (in Millions)





# Creatine and Women

Some of the top viewed videos last year on the topic of creatine included videos created by women/for women



zeylovesit Zeylove

Antwort auf @lopi i don't think so  
#creatinebeforeandafter #creatine #creatinetransformation #creatinequeen #gymtok

116.4K Likes, 401 Comments. TikTok video from Zeylove (@zeylovesit): "Antwort auf @lopi i don't think so #creatinebeforeandaf..."

1.5M views | original sound - 🎵



fitnessgirl\_stephanie Stephanie Vick

Take your creatine ladies 😊 #fyp #strengthtraining #girlwholifts #fitnessgirl #jimgirl #jimtransformation #fitnessmotivation #tiktokviral #creatinemonohydrate #creatine

16K Likes, 119 Comments. TikTok video from Stephanie Vick (@fitnessgirl\_stephanie): "Take your creatine ladies 😊 #fyp #stren..."

772.1K views | Beat Automotivo Tan Tan Tan Viral - WZ Beat

# Creatine and Cognitive Health

In medical trials, creatine supplementation has been shown to improve cognitive health and mood

Review > [Nutrients](#). 2022 Feb 22;14(5):921. doi: 10.3390/nu14050921.

## Effects of Creatine Supplementation on Brain Function and Health

Scott C Forbes<sup>1,2</sup>, Dean M Cordingley<sup>3,4</sup>, Stephen M Cornish<sup>2,3,5</sup>, Bruno Gualano<sup>6</sup>, Hamilton Roschel<sup>6</sup>, Sergej M Ostojic<sup>7,8</sup>, Eric S Rawson<sup>9</sup>, Brian D Roy<sup>10</sup>, Konstantinos Prokopidis<sup>11</sup>, Panagiotis Giannos<sup>12</sup>, Darren G Candow<sup>13</sup>

Affiliations + expand

PMID: 35267907 PMCID: [PMC8912287](#) DOI: [10.3390/nu14050921](#)

[Free PMC article](#)

### 7. Conclusions and Future Directions

[Go to: ▶](#)

It is well established that creatine supplementation can have favorable effects on measures of skeletal muscle mass and performance (i.e., strength). Beyond muscle, accumulating research shows that creatine supplementation and GAA can increase brain creatine content which may help explain some of the preliminary benefits from creatine supplementation on indices of cognition, depression, concussion, and TBI. Research is lacking or inconsistent regarding the efficacy of creatine for treating symptoms of neurodegenerative diseases, anxiety, or PTSD. Future research is needed to determine the mechanistic and clinical effects of longer-term creatine supplementation dosing strategies on brain function and health. Future multifactorial interventions may also be required where creatine is combined with other strategies to enhance cognition or treat neurodegenerative diseases.

## Creatine

Supports quick energy production, muscle maintenance, and cognitive function.\*



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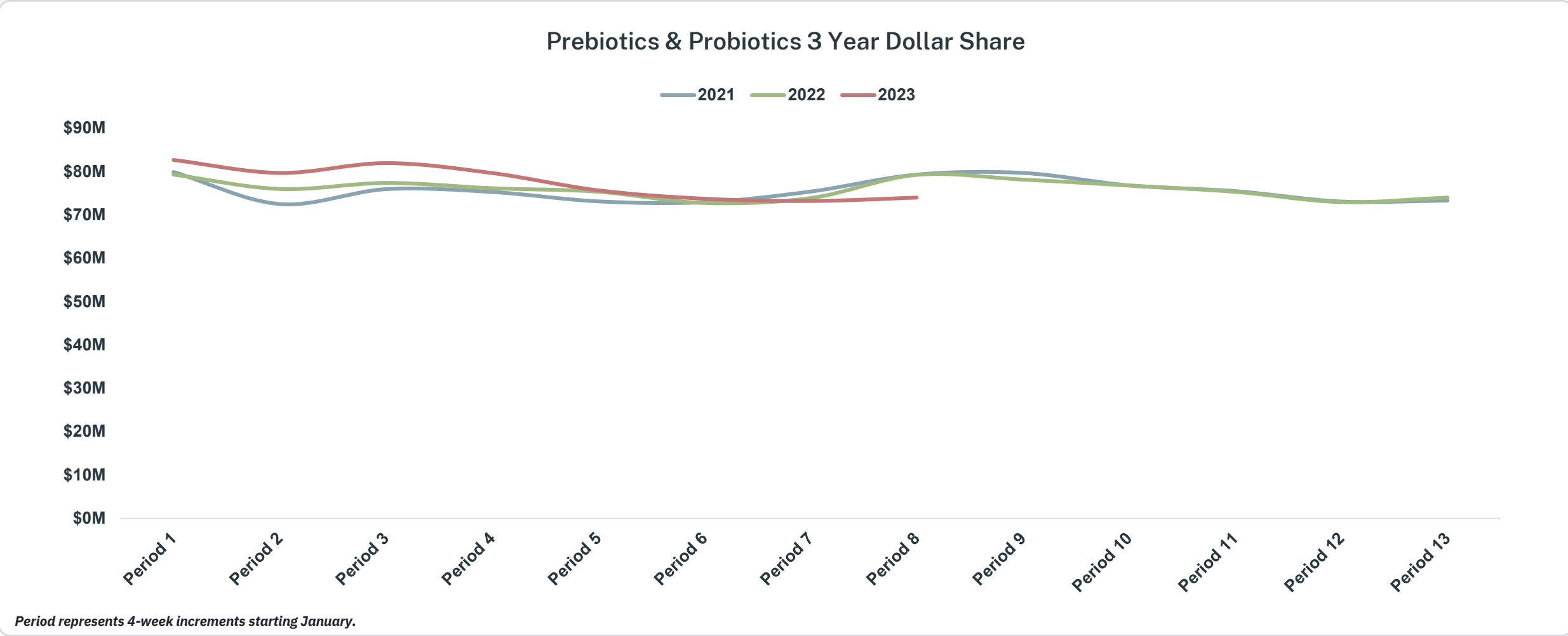
# Probiotics and the Microbiome

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# Pre/Probiotics Started Off Strong In Sales Dollars In 2023

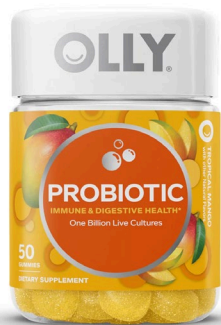
The category saw a slight decline in sales dollars in the latest 3 periods after outpacing 2021 and 2022 in the first quarter of the year.



# Delivery Forms Of Probiotics

Different consumers have different preferences when it comes to delivery forms. Gummies are a delivery form that's growing in both Brick & Mortar and on Amazon

## GUMMIES



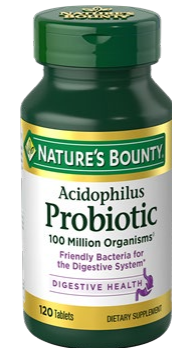
## CAPSULES



## POWDER



## TABLETS



# Health Focus' in Probiotics

While probiotics are best known for their usage for digestive health, products that tackle more than just gut health are gaining attention from consumers

## TOTAL SUPPORT

Benefits beyond your gut.

Formulated with strains that support:

- Digestive Health
- Gut Barrier Integrity
- Gut Immune Function
- Cardiovascular Health
- Dermatological Health
- Micronutrient Synthesis



## MOOD SUPPORT



## COGNITION



## FEMININE HEALTH

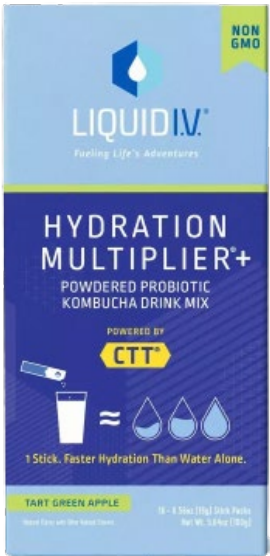




# Combination Products That Contain Probiotics

Brands are including probiotics in their products for a more comprehensive product – allowing them to market it as good for gut health

## HYDRATION



## GREENS POWDER



AG1 REPLACES YOUR:

- Multivitamin
- Pre and probiotics
- Adaptogens
- Mushroom complex
- Superfoods powder
- + more


## PROTEIN POWDER



## SOCIAL MEDIA TRENDS

# GutTok – Gut Health is a popular topic on TikTok

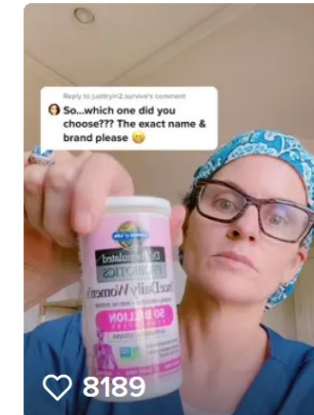
2022 Top Gut Health Tik Tok Topics by Views

Rank	Topic	 Views
1	Gut Health	5.0 B
2	GutTok	1.6 B
3	IBS	708 M
4	Probiotics	134 M

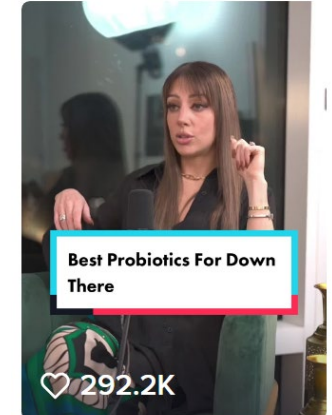
Popular Topics



Probiotics &  
Reducing  
Bloat



Recommendations  
From  
Professionals



Probiotics &  
Feminine  
Health



# Homeopaths

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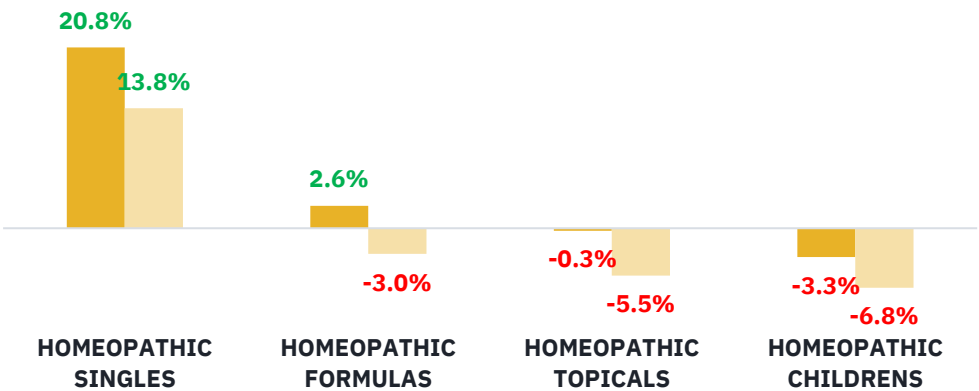
# Functionality or Homeopathy?

Homeopathic medicine is usually derived from organic or natural ingredients and placed under the tongue for maximum absorption. Most products are for Cold & Flu and Pain Relief.

## Homeopathic Category Trends

52 Wks Ending 8/13/23

Dol % Chg    Unit % Chg



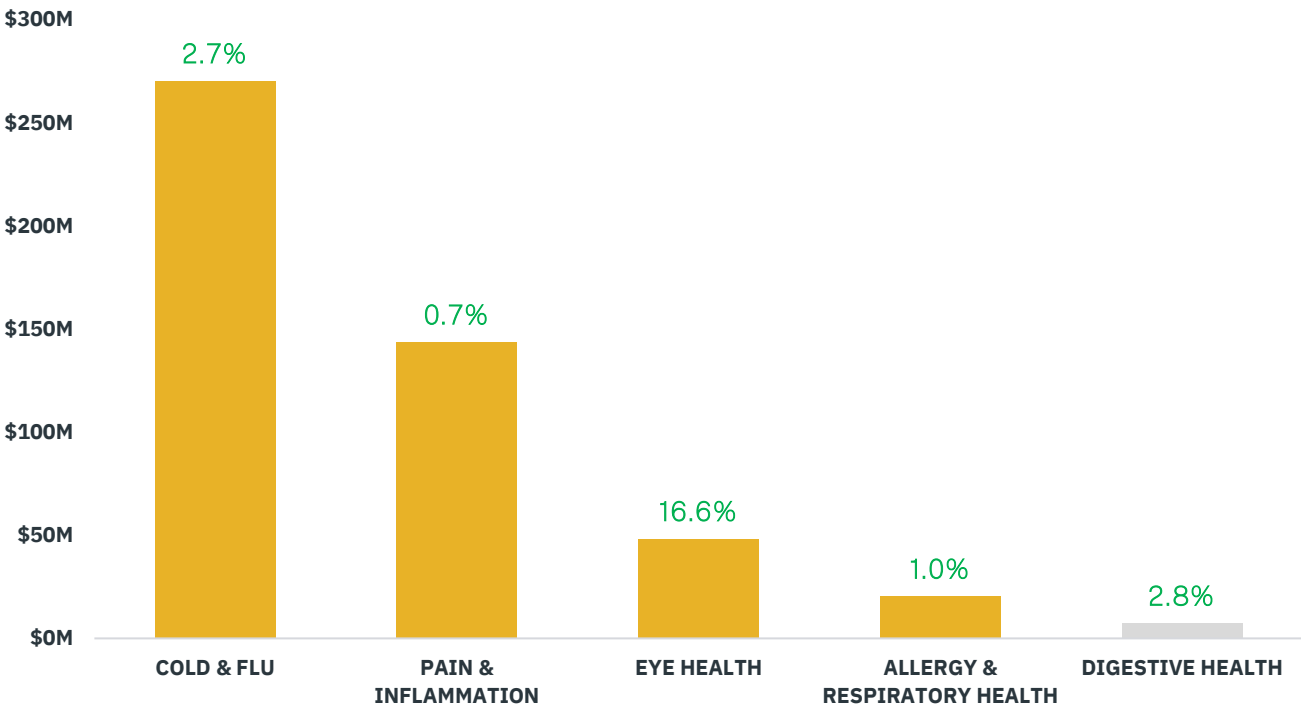
### Homeopathic Medicine Hero Brands



## Homeopathic Health Focus

### Homeopathic Medicine 52 Weeks

Dollar Sales, Dollar % Change YoY





# Thank you!

For more information, contact  
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