



January 2024

What's Supp?

Vitamins & Supplements Insights from the
SPINS Best Practice Team



Meet The 'What's Supp' Newsletter Team



Laura Brookman

Senior Analyst,
Best Practice



Jaime Mruz

Manager, Best
Practice



Bre Blazei

Manager, Best
Practice



Clare Rebhun

Senior Manager,
Best Practice

New Year's Resolutions: *All Talk Or Data-Backed?*

Nearly one-third of U.S. adults plan to make New Year's resolutions or set a goal for 2024, according to a YouGov poll. Of those, 89% think it's very or somewhat likely they'll keep their resolution through the year. Vitamins & Supplements can play a crucial role in kickstarting resolutions like 'get in shape' and 'improve mental health'. This month, we're looking into the data to see if the most common resolutions are *all talk or data-backed*.



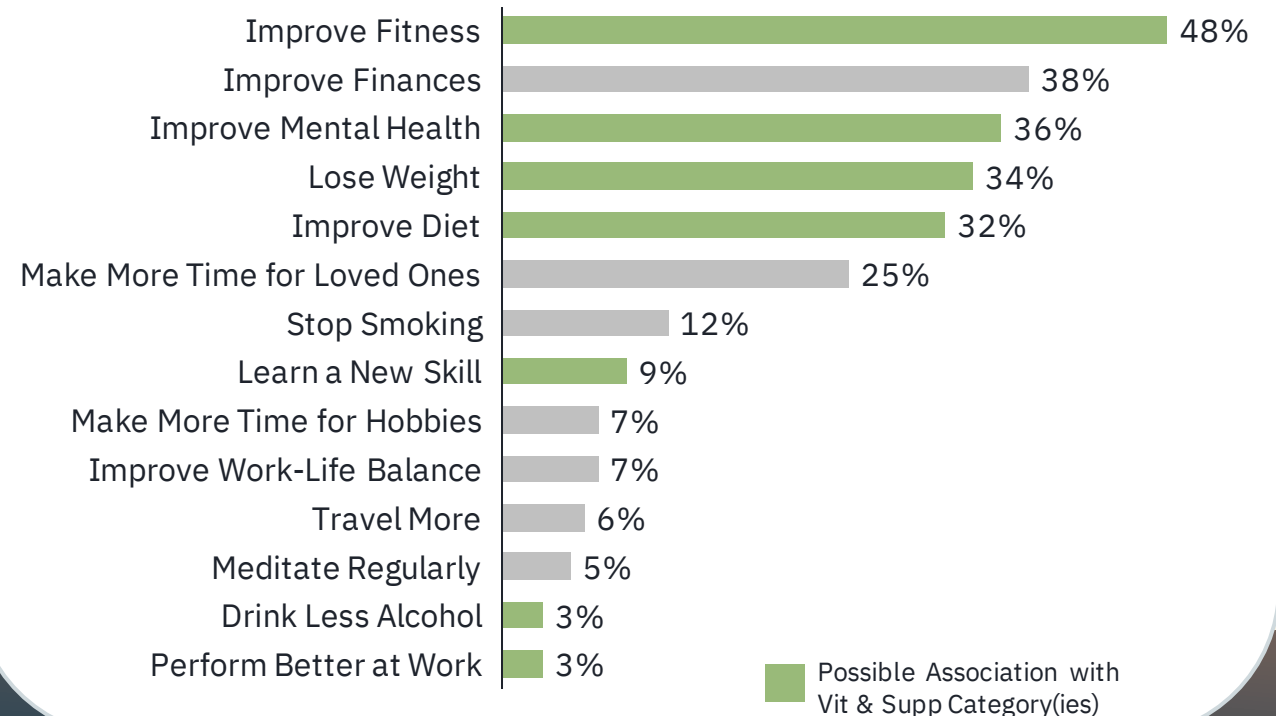
New Year's Resolutions At A Glance

In October 2023, Forbes Health/OnePoll conducted a survey of 1,000 U.S. adults and found that **Physical and Mental Health** remain top of mind when it comes to New Year's resolutions for 2024.

...how do these findings translate to the Vitamins & Supplements space?

Most Popular New Year's Resolutions for 2024

% Survey Respondents





Resolutions: **Improve Fitness & Lose Weight**

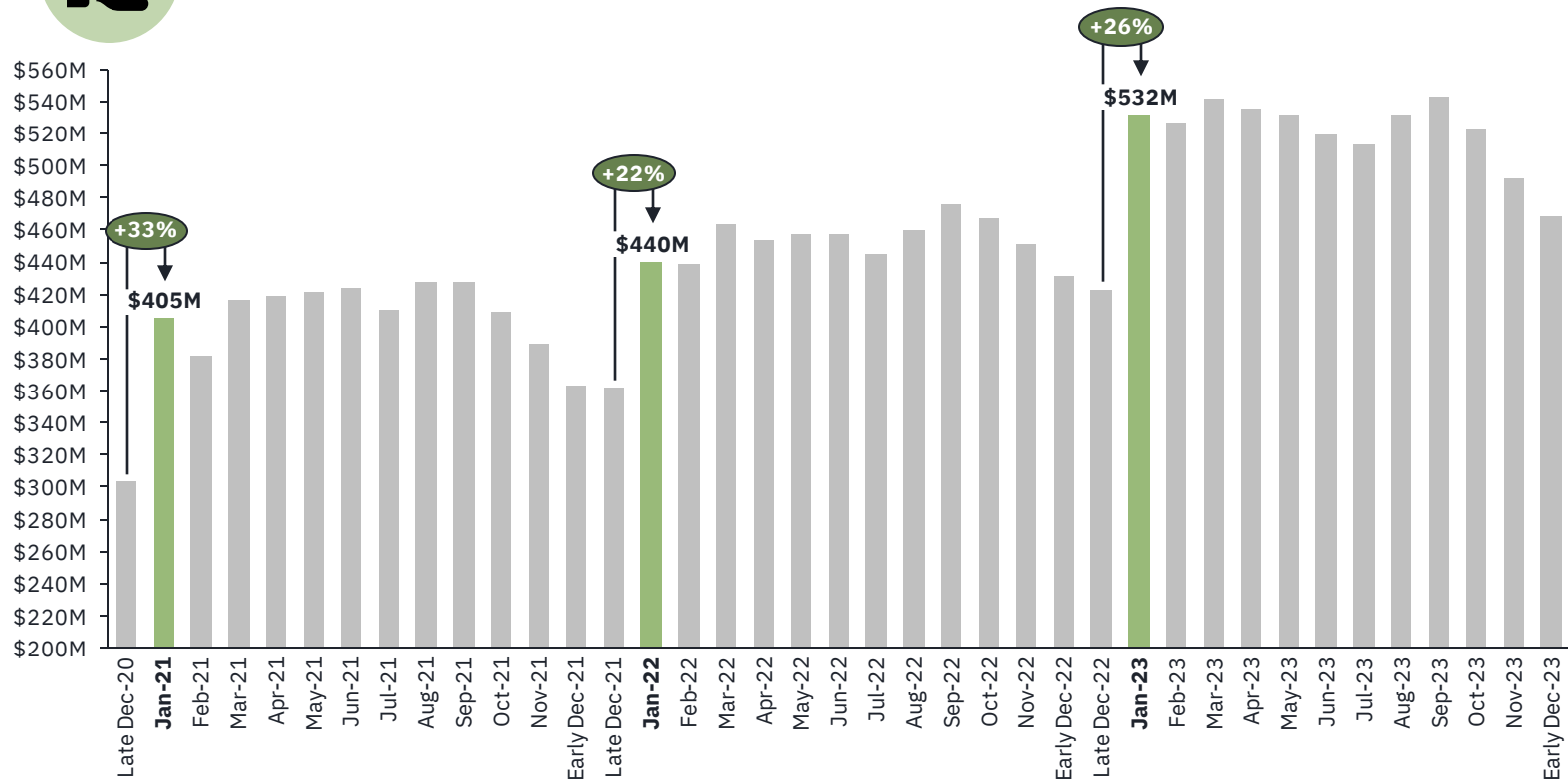
Associated VMS Categories: **Performance Nutrition + Protein Supplements & Meal Replacements**

Almost half of survey respondents want to improve their fitness in 2024, and 34% want to lose weight – does the data support this?



Q: Do fitness supplements sales spike around the New Year?

A: **Yes!**



Quad-Weekly Dollar Sales

Our Take: Fitness supplements have experienced a double-digit jump in January year after year. Not only is there an initial spike, but *this spike seems to last throughout the year*, suggesting this is one resolution that sticks!

Fitness Supplements At A Glance

\$6.7B

L52 Week Dollar Sales

+13%

3-Year Dollar CAGR



Resolutions: **Improve Fitness & Lose Weight**

Associated VMS Categories: **Performance Nutrition + Protein Supplements & Meal Replacements**

Trend To Watch: Performance Nutrition products tailored to women

Sales of products marketed to women grew +6% in the last year, while those marketed to men fell -2%. Women have unique nutritional and hormonal needs, and brands are creating products to support those needs across the Performance Nutrition spectrum.

Liquid Protein & Meal Replacements



Weight Management Formulas



Protein & Meal Replacement Powder



Preworkout



Source: SPINScan; Total US – Natural Channel + Total US – MULO (powered by Circana), VMS Department – Performance Nutrition (minus Hydration & Electrolyte) + Protein Supplements & Meal Replacements Categories, Latest 52 Weeks Ending 12/3/23



Resolution: **Improve Diet**

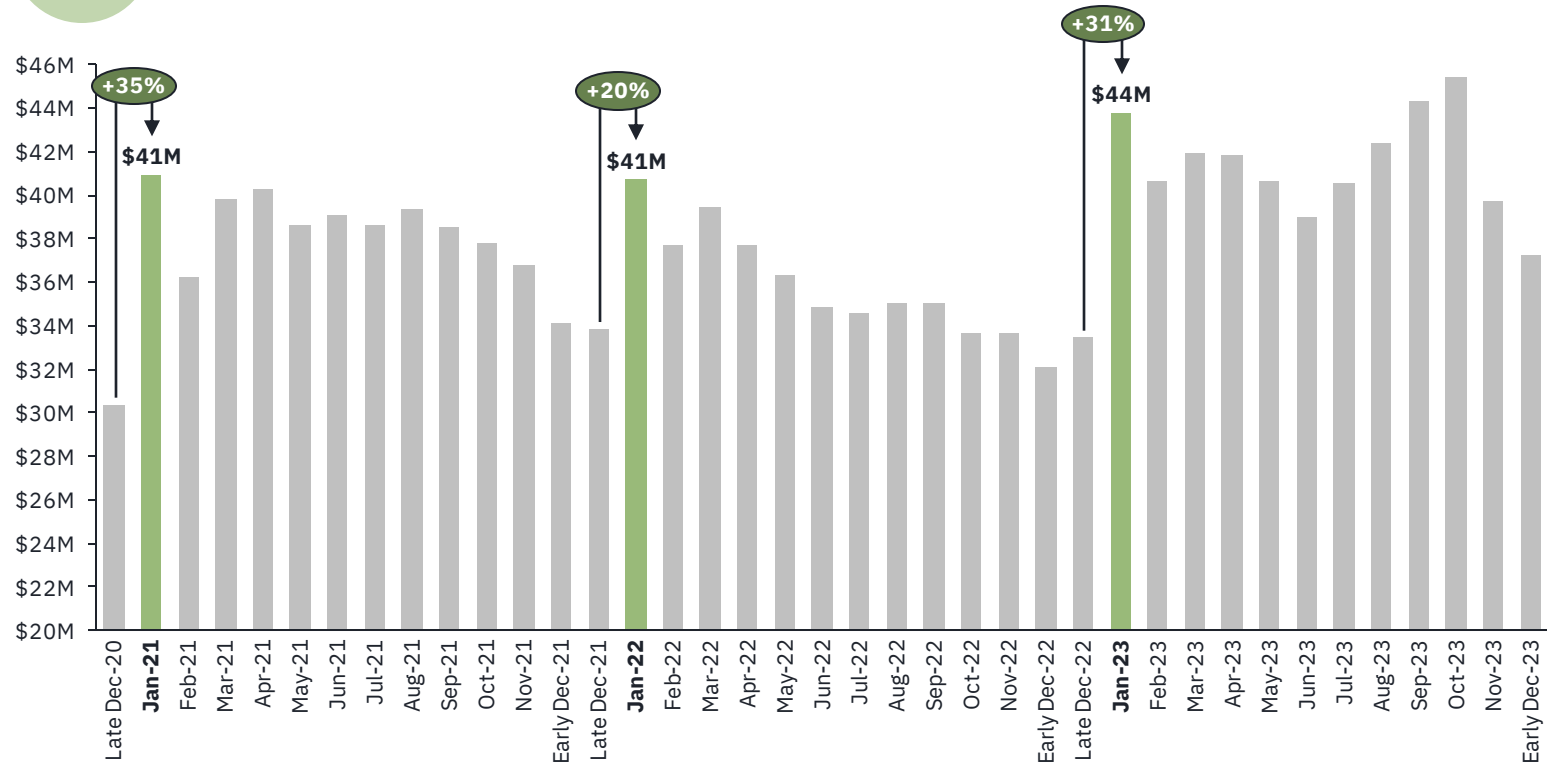
Associated VMS Category: **Superfood & Whole Food Supplements**

32% of survey respondents want to improve their diet in 2024 - does the data support this?



Q: Do Superfood & Whole Food Supplements sales spike around the New Year?

A: **Yes!**



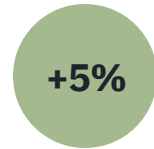
Quad-Weekly Dollar Sales

Our Take: Superfood & Whole Food Supplements tend to have their biggest month of the year in January. Shoppers are turning to this category at the start of the year to supplement their overall health and meet their nutrition goals.

Superfood & Whole Food Supplements At A Glance



L52 Week Dollar Sales



3-Year Dollar CAGR



Resolution: **Improve Diet**

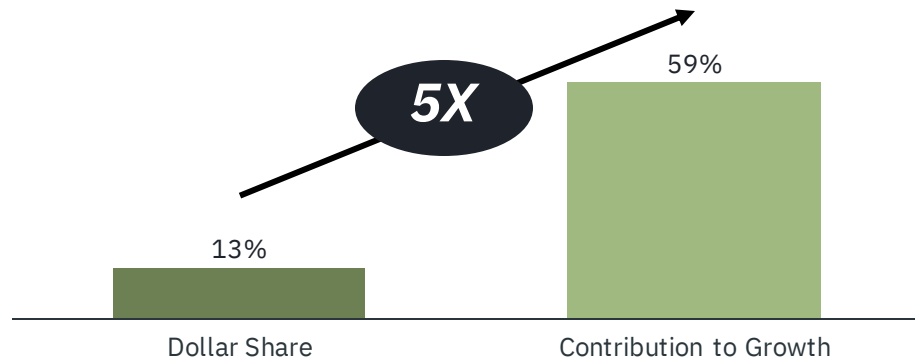
Associated VMS Category: **Superfood & Whole Food Supplements**

Trend To Watch: Superfood and Whole Food Supplements that support digestive health

Gut Feelings

Research continues to find over and over again the importance of gut health and the role the microbiome plays in nearly all our body's functions. Shoppers are looking to support their gut with superfood supplements that also round out their nutritional needs – a true win-win!

Superfood & Whole Food Supplements
Digestive Health Focus





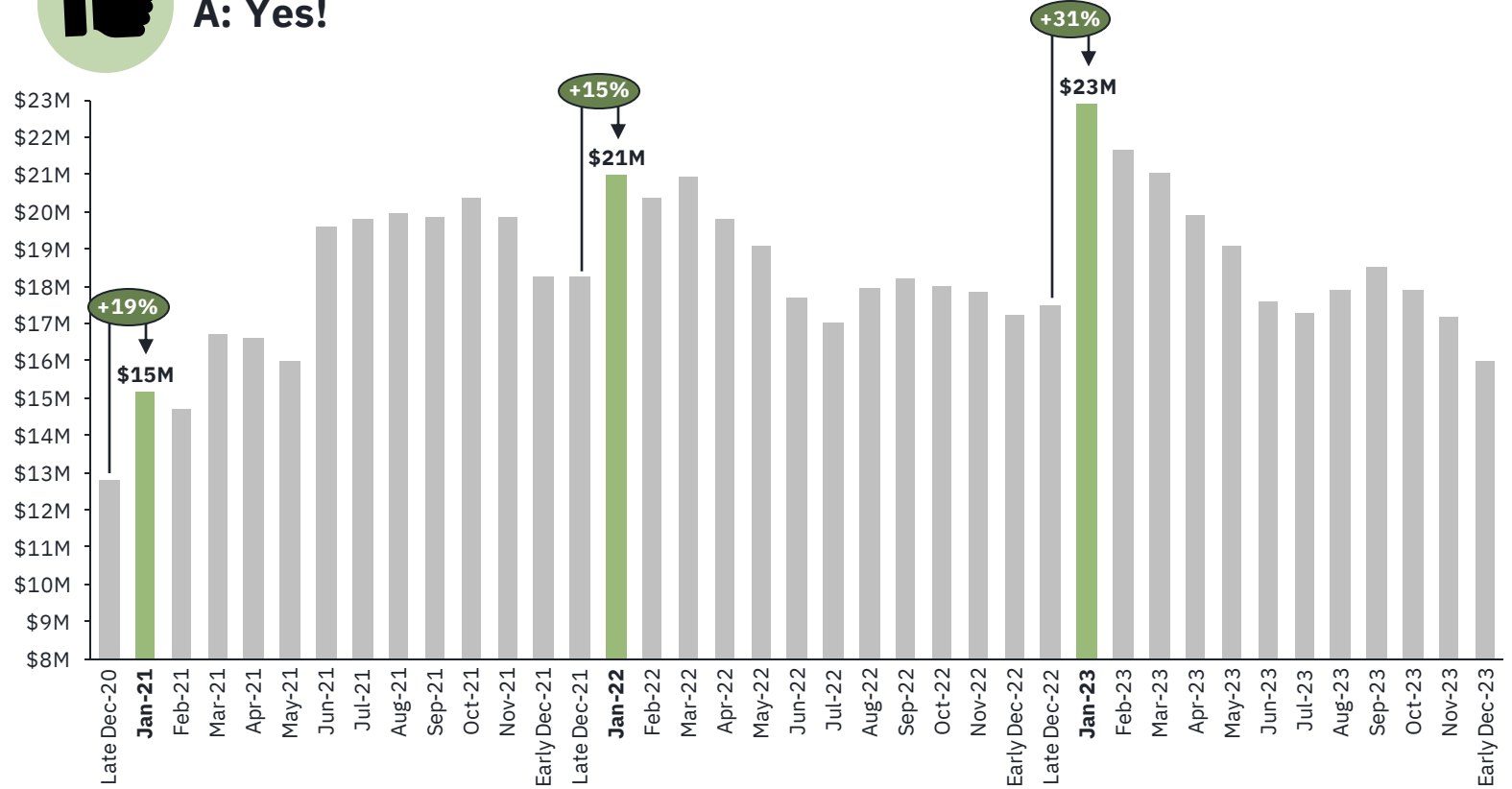
Resolution: **Improve Mental Health**

Associated Health Focus: **Mood Support**

36% of survey respondents cite improving mental health as a 2024 Resolution - does the data on Mood Support Supplements support this?



Q: Do Mood Support supplements sales spike around the New Year?
A: Yes!

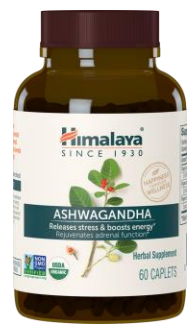


Quad-Weekly Dollar Sales

Our Take: Mood Supplements tend to have their highest sales of the year in January. It's clear that post-holidays, shoppers are looking for ways to manage life's challenges in a healthy way. They are reaching for Magnesium, Vitamin D, Ashwagandha, and more to support their emotional wellbeing.

Mood Support At A Glance
+3% 3-Year Dollar CAGR

#1 Functional Ingredient
Ashwagandha





Resolution: **Improve Mental Health**

Associated Health Focus: **Mood Support**

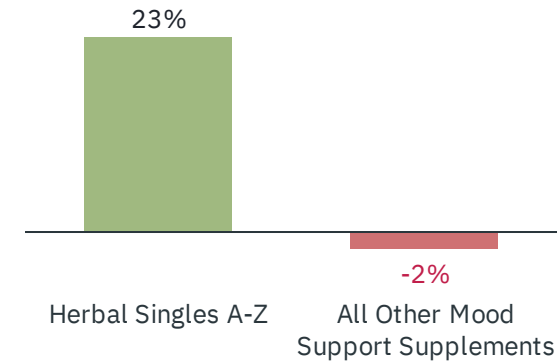
Trend To Watch: The return of singular herbs



Single Herbs Rebound

Herbal Singles suffered a setback in recent years, but we are now seeing a tremendous resurgence compared to the rest of category remaining flat. Ashwagandha, Kava, Rhodiola, Lavender, Lemon Balm, and Saffron are just a few that are tapping into rising consumer interests with double-digit growth over the past 52 wks.

Mood Support Supplements





Resolutions: **Learn A New Skill & Perform Better At Work**

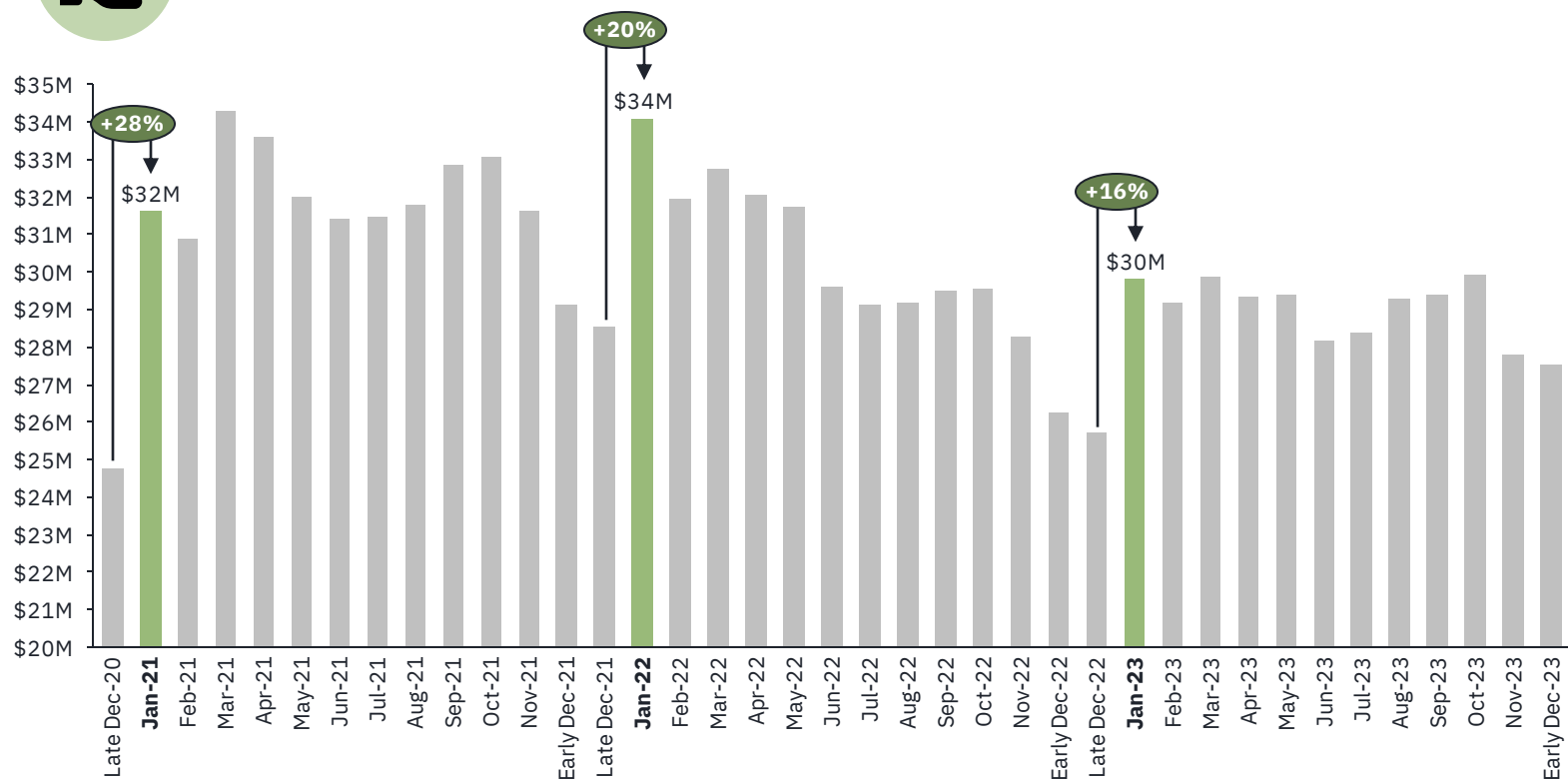
Associated Health Focus: **Cognitive Health**

9% of survey respondents cite learning a new skill as a 2024 Resolution and 3% want to perform better at work - does the data on Cognitive Health Supplements support this?



Q: Do Cognitive Health supplements sales spike around the New Year?

A: **Yes!**



Quad-weekly Dollar Sales

Our Take: Cognitive Health Supplements have continuously posted *double-digit growth* compared to the previous period around the New Year. Whether it's resolutions or a wakeup call after the holidays, clearly more shoppers are reaching for brain boosters this time of year!

Cognitive Health At A Glance



L52 Week Dollar Sales



3-Year Dollar CAGR



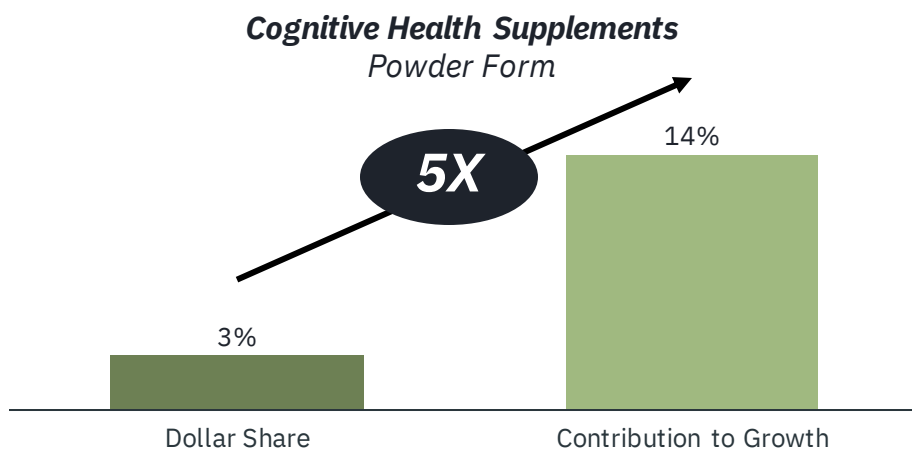
Resolutions: **Learn A New Skill & Perform Better At Work**

Associated Health Focus: **Cognitive Health**

Trend To Watch: powder forms that transform into brain boosting beverages

Power of Powder

Following the prevalence of powder formats in Creatine, Protein, and Hydration, we're starting to see the form take off in Cognitive Health supplements. A popular format for delivering functional ingredients such as Mushrooms and MCT, powders offer a convenient and tasty way to boost cognition.





Resolution: **Drink Less Alcohol**

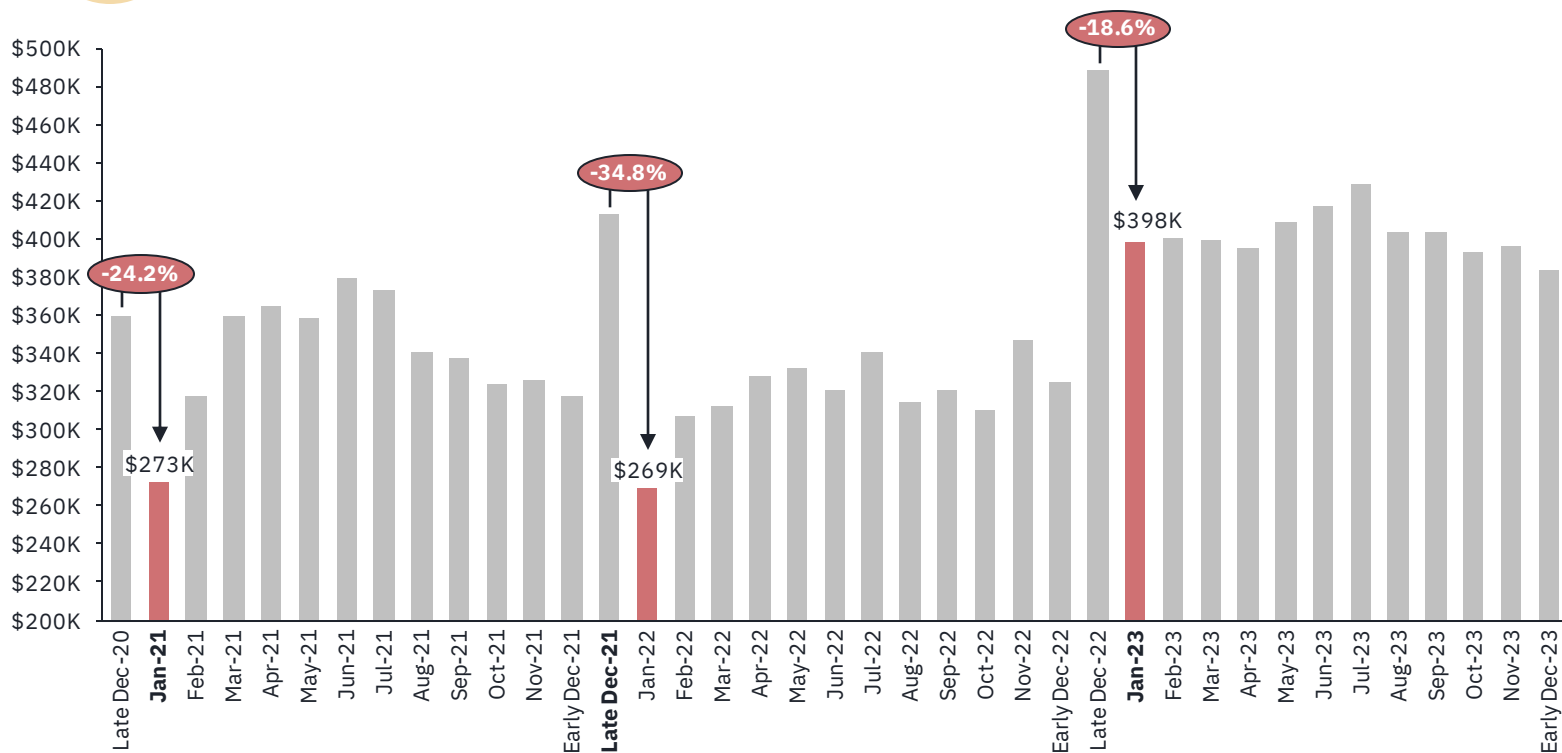
Associated Health Focus: **Hangover Remedies**

3% of survey respondents cite drinking less alcohol as a 2024 Resolution - does the data on Hangover Remedies support this?



Q: Do hangover remedy sales plummet around the New Year?

A: Yes, but...



Quad-Weekly Dollar Sales

Our Take: While sales of hangover remedies fall in January, this appears to be more of a *return to baseline* as opposed to a seasonal reaction. That said, December is the month to watch for brands that sell hangover remedies!

Overall, Alcohol Sales Have Been Stagnant



Alcohol
3-Year Dollar CAGR



Hangover Remedies
3-Year Dollar CAGR



Resolution: **Drink Less Alcohol**

Trend To Watch: instead of drinking, shoppers are reaching for herbs, minerals, and adaptogens that can aid in recreating the feeling of having a cocktail – think mood boosting ingredients in formats that can easily be mixed into a NA beverage

Tinctures

\$ % Chg. vs. YA

+27%

Kava



+67%

Rhodiola



+46%

Lemon Balm



Powders

\$ % Chg. vs. YA

+5%

Magnesium



+64%

Taurine



+69%

Theanine



Liquids

\$ % Chg. vs. YA

+54%

Kratom



+870%

Ashwagandha



+31%

CBD



Recommendations:

Year-Round Support

No matter the goal, shoppers are gravitating towards solutions that cater to their needs and can be seamlessly integrated into their lifestyle, such as:

- Products tailored to the **unique needs of women** throughout their cycle
- Easy-to-mix **powders** that transform into a satisfying beverage
- Simple, **healthier swaps** that mimic the effects of alcohol

VMS Brands and Retailers can support consumers by working together to clearly market relevant products through displays and education focused on addressing common resolutions in January, while incentivizing consumers to keep their new habits with sharp pricing and promotion throughout the year.



SPINS delivers the common language for the **Vitamins & Supplements** Industry

We empower VMS brands to identify consumer trends, fuel innovation, and drive growth by delivering a common language built on:

- Unparalleled access to VMS sales data across Natural, Specialty, and Conventional Channels
- The industry's deepest product intelligence platform covering over 9 VMS categories and 47 VMS subcategories
- Hierarchies that streamline the collaboration between retailers and suppliers.



SPINS PROPRIETARY DATA

Retailer insights exclusive to SPINS

Natural

SPROUTS
FARMERS MARKET

NATURAL
GROCERS

FRESH THYME
MARKET

Specialty

THE VITAMIN SHOPPE

VITAMIN
WORLD

GNC
LIVE WELL



SPINS CONVENTIONAL DATA

In partnership with IRI Worldwide

Kroger

Walmart

CVS



AMAZON DATA

Powered by SPINS Amazon Channel Management

amazon



Contact us to learn how SPINS can help you grow growth@spins.com

