



February 2024

# What's Supp?

Vitamins & Supplements Insights from the  
SPINS Best Practice Team



# Meet The 'What's Supp' Newsletter Team



**Clare Rebhun**  
Senior Manager,  
Best Practice



**Jaime Mruz**  
Manager, Best  
Practice



**Bre Blazei**  
Manager, Best  
Practice



**Laura  
Brookman**  
Senior Analyst,  
Best Practice



**Claire Powell**  
Senior Analyst,  
Best Practice



**Evonne Chan**  
Analyst, Marketing



**Rahul Roy**  
Senior Manager,  
Retail

# Healthy At Any Age:

*What's trending among VMS products targeting Kids, Teens, Adults, and 50+?*

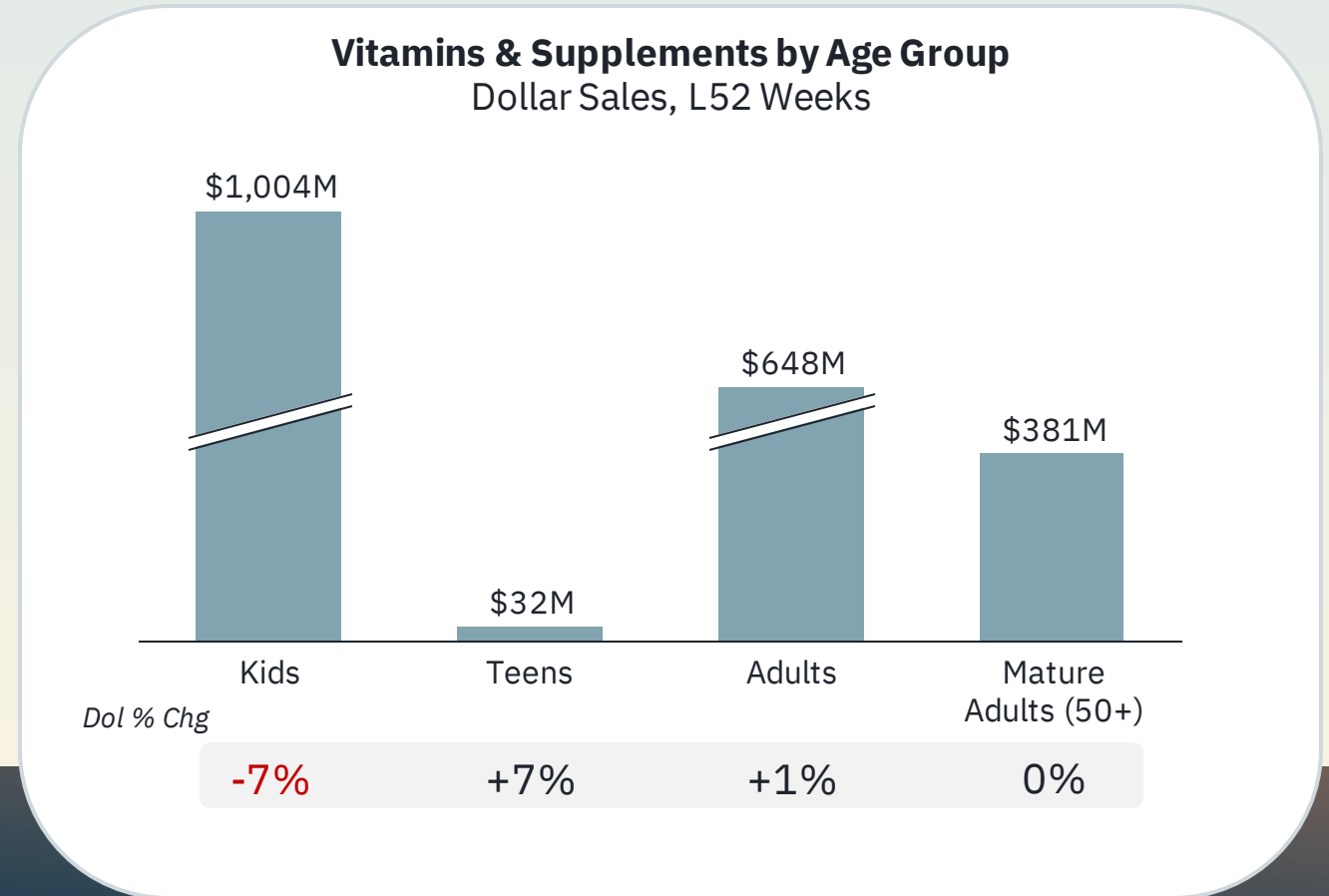
Tweens are implementing multi-step skincare routines, Teenagers are getting health advice from TikTok, and Adults are increasingly focusing on health span and prevention. With a seemingly Wellness-obsessed culture, it's no wonder 77% of Americans regularly take dietary supplements. In this edition, we sought to understand how this practice differs among age groups and how brands can resonate with their core demographics.



# SPINS 'Age' Attribute In Action

The AGE attribute is a positioning attribute that **reflects what age range a product is intended to be used by**. It combines label claims with other label information and design as required.

Within Vitamins & Supplements, **products targeted to Kids bring in the most volume, however those focused on Teens are leading the charge in growth**. But what's trending in each group and what has staying power?



# Happy Days Ahead: Mood Support Products For Kids

While sales of children’s vitamins decline, **mood support products show double-digit growth**, outpacing all other health focuses; brands are seeking **diverse functional ingredients** to achieve results. With mental health topping the list of worries for parents, this trend is not surprising. According to a new Pew Research Center survey, 4 in 10 U.S. parents with children younger than 18 say they are extremely or very worried that their children might struggle with anxiety or depression at some point.



Magnesium



Theanine



GABA



Magnesium



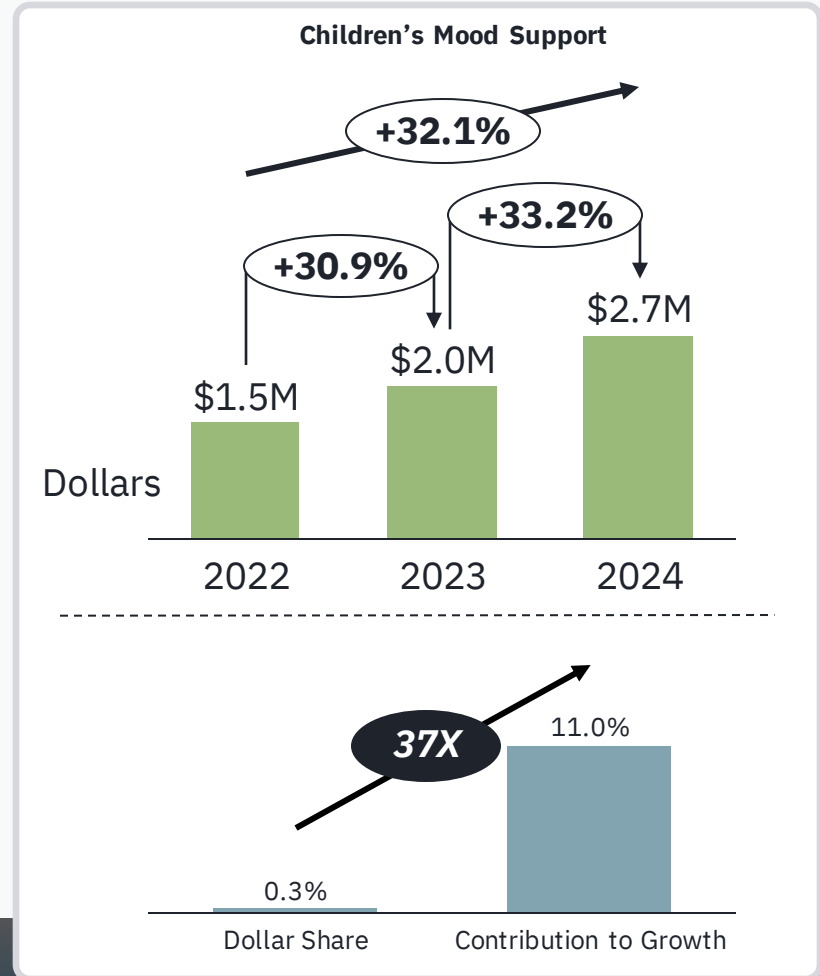
Flower Essences



Black Walnut



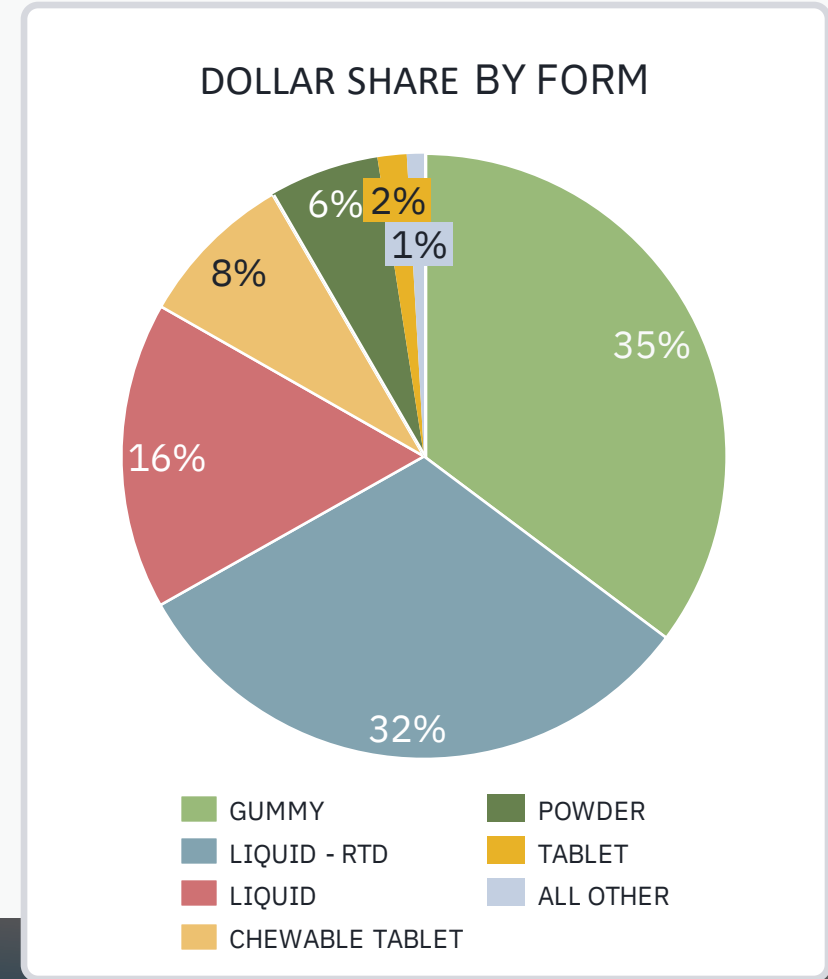
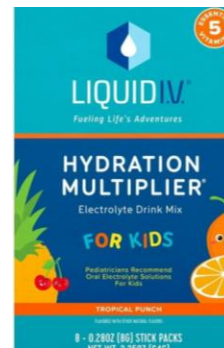
Reishi Mushrooms



# The Powder Revolution: Sales Surge Amidst Declining Trends

We've seen Powders for Adults take off in recent periods, and now, that same trend is migrating into Children's supplements. As **Gummies and Chewable Tablets are scrutinized**, with the sugar content and reliability of delivering accurate doses coming into question, **parents are reaching for Powders** to deliver easily absorbable supplements for their Kids in a convenient way.

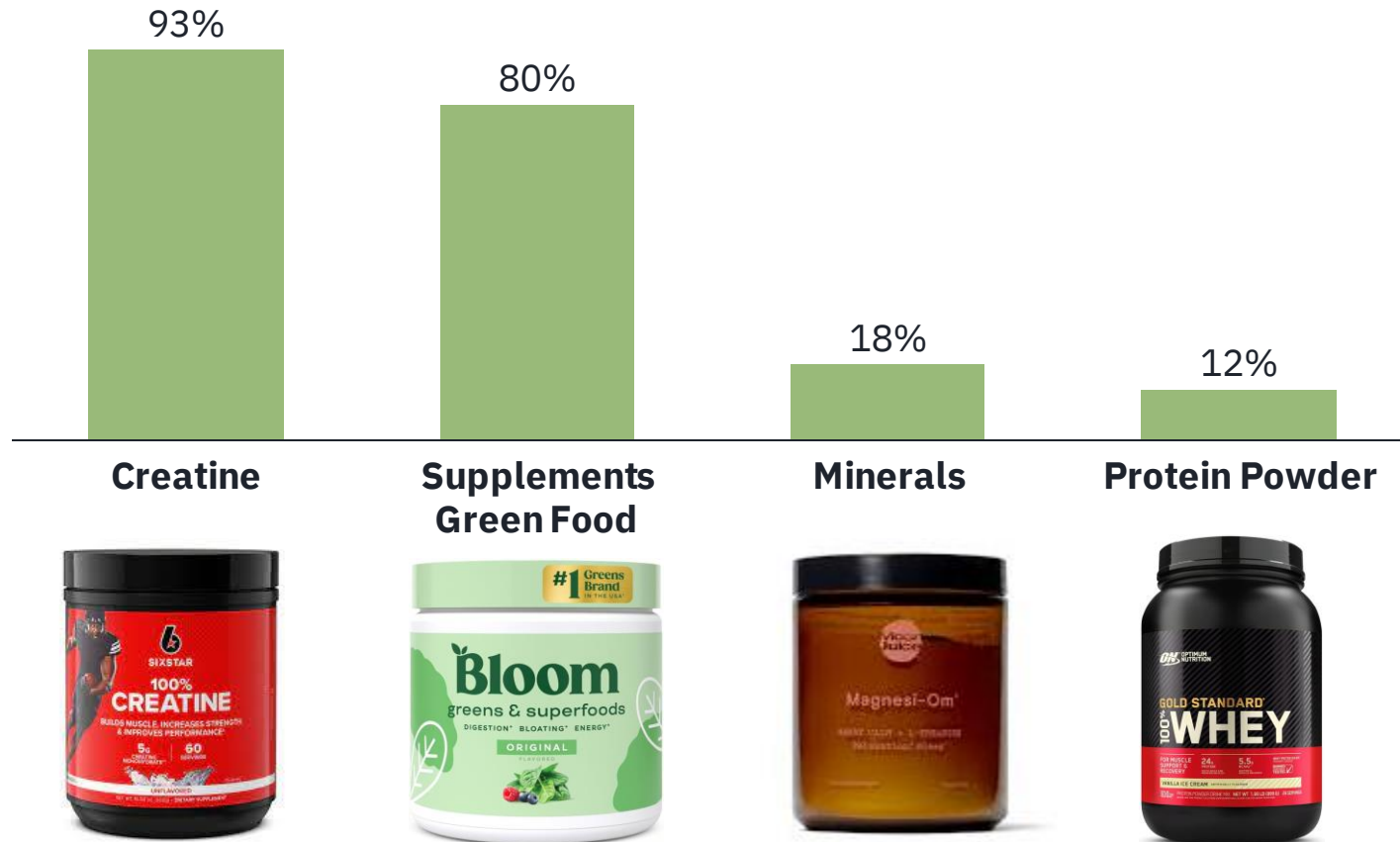
Performance Breakdown	Share % Chg +/-	Dol % Chg
GUMMY	-1.3%	-10.2%
LIQUID - RTD	1.2%	-3.4%
LIQUID	-0.2%	-8.4%
CHEWABLE TABLET	-0.5%	-12.4%
<b>POWDER</b>	<b>1.0%</b>	<b>11.0%</b>
TABLET	-0.1%	-11.0%
ALL OTHER	0.0%	-6.8%



# Get Your Head In The Game: TikTok Says It's Cool To Care About Your Health

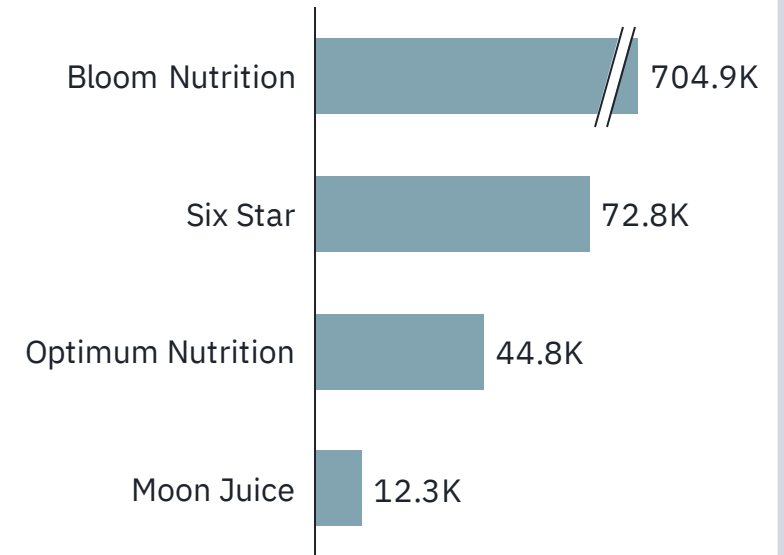
**1 in 4** TikTok users are **under 20 years old**. From Hot Girl Walks to Stanley Cups to GymTok, TikTok has defined trends post-COVID as people become more focused on their health. With gym culture absorbing TikTok, **teens may look to leverage the app for advice on performance nutrition & healthy habits**

## Sales Growth of Trending TikTok Categories



**51% of Gen Z TikTok users prefer to search TikTok for information over Google.**

## TikTok Follower Counts



Source: SPINS TOTAL US MULO + Natural , TPL Universe, Performance Nutrition, L52 Weeks Ending 12/31/2023

<https://explodingtopics.com/blog/tiktok-demographics>

<https://explodingtopics.com/blog/popular-searches-on-tiktok>

# Screenagers & Mental Health

**95%** of VMS products targeted towards teenagers are multivitamin supplements, leaving the door wide open for innovation

The National Institute of Health reports that **1 in 3 teens age 13-18 will experience an anxiety disorder**

Ashwagandha  
Probiotics  
Chromium  
Vegetables

Teen Multivitamin Gummies  
With Fruits, Vegetables & Probiotics  
Supports Immune Health\*  
Promotes Energy Production\*  
Healthy Skin Support\*  
Gluten Free  
120 Gummies | Multivitamin Supplement

TEEN FERMENTED MULTIVITAMIN+  
25+ VITAMINS & MINERALS  
FRUITS & VEGGIES  
IMMUNE HEALTH SUPPORT\*  
60 CAPSULES  
DIETARY SUPPLEMENT  
CODEAGE

Magnesium  
Omega-3  
Biotin  
Probiotics

**Consider adding Magnesium, Ashwagandha, Omega-3 to teen multivitamins as an added combat for anxiety**

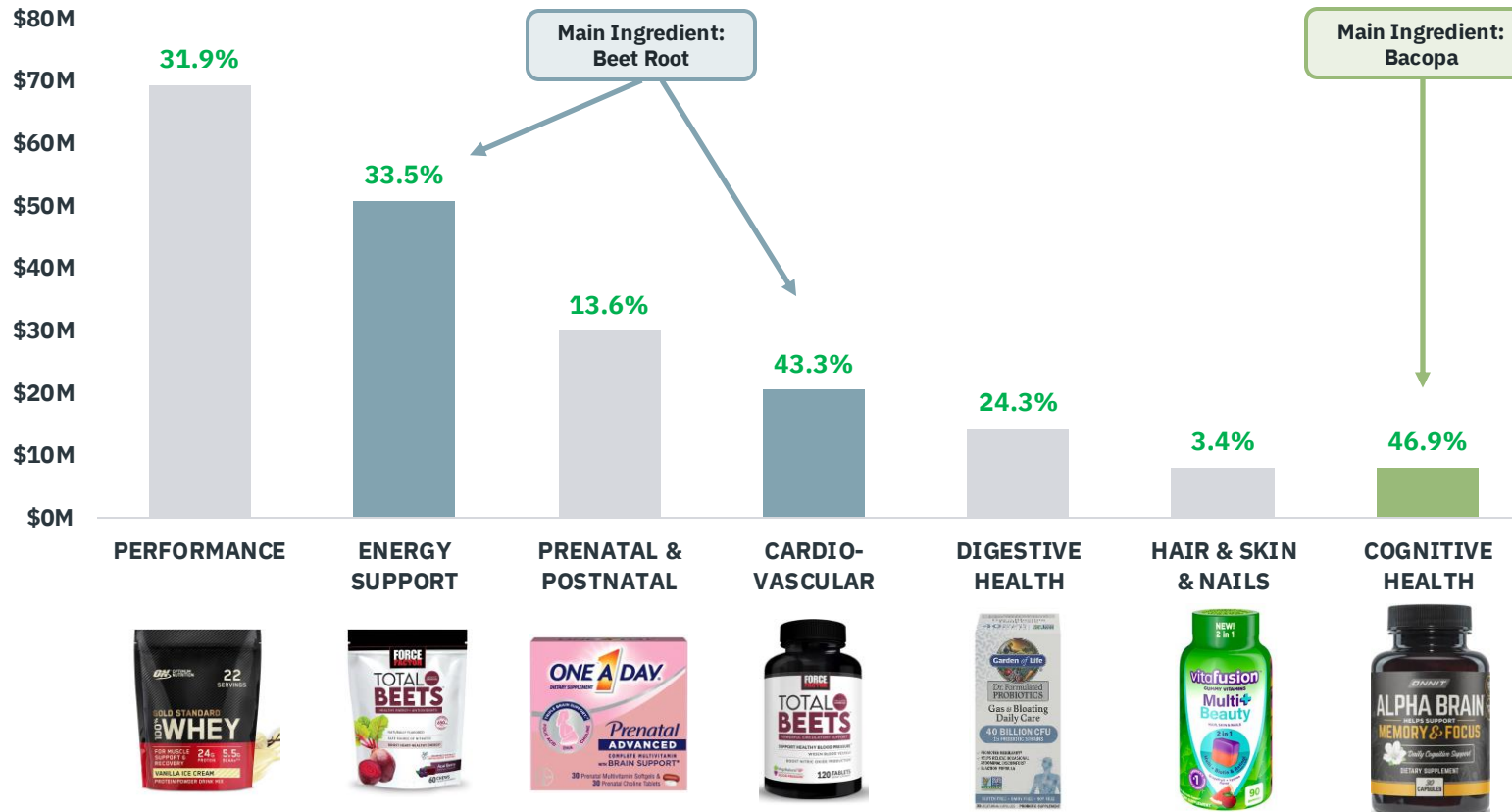


# Achieving Optimal Wellness With Whole Body Health

In 2023, the VMS industry saw a greater push for **whole body wellness**, with growth centered around **Performance, Energy Support, Cardiovascular (heart), Digestive, and Cognitive (brain & memory) Health**. Adult shoppers are taking a **holistic approach** to whole body wellness, with a focus on ingredients like **Beet Root** for improved blood flow and **Bacopa** for brain & memory.

## Age Group: Adults, Health Focus Trends

Dollar Sales, Dollar % Change YoY



## Functional Ingredient Spotlight

### Beet Root



Beet Roots are a great vasodilator food, falling within the holistic approach for energy support and cardiovascular health.<sup>1</sup>

Beets contain antioxidants, high levels of betalain and carotenoids. Beets can boost nitric oxide levels which have shown to improve blood flow.

**+103.9%**  
Dol % Chg YoY

### Bacopa



Bacopa is a botanical frequently found in Ayurvedic medicine (natural system of medicine originating in India) supporting memory & focus.

Supplements with Bacopa have been used to improve memory and thinking skills, verbal learning, and anxiety reduction.<sup>2</sup>

**+60.1%**  
Dol % Chg YoY

1: Source: <https://www.webmd.com/diet/health-be-nefits-bee-root>

2: Source: <https://www.ncbi.nlm.nih.gov/books/NBK589635/#:~:text=The%20main%20indications%20for%20using%20anxiety%20reduction%20with%20using%20Bacopa.>

Source: SPINS TOTAL US MULO + Natural, TPL Universe, Vitamins & Supplements, Age: AGE GROUP – ADULT, Health Focus \*Health Focus' with YoY Growth Only L52 Weeks Ending 12/31/23

# Creatine: For adults, but not for minors?

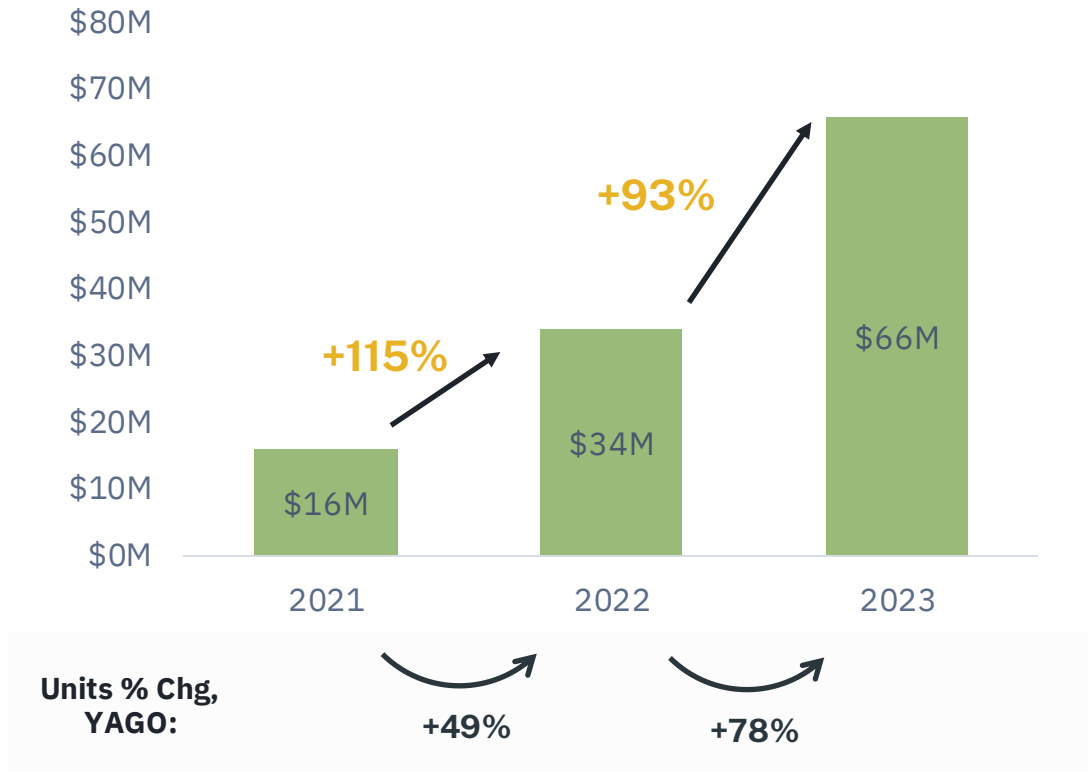
This subcategory continues to be one of the highest growing subcategories in the VMS department but could recent changes to legislation affect sales?

NY Governor Hochul signs bill banning the sale of weight management and "muscle building" supplements to minors

October 27, 2023

Nutritional  
OUTLOOK

Sales Volume Growth of Creatine Supplements



Recent research has shown that creatine can help maintain cognitive health, making this supplement **poised for larger success** in the adults & mature adults space. However, creatine is still mainly known for its purported benefits in the **bodybuilding & exercise performance space** and continues to be the main driver of sales.

With rising popularity and constant discussion around the supplement online, it is no surprise that **teens are interested** in the supplement too.

However, in October of last year, the Governor of New York **signed a bill banning** the sale of weight management and muscle building supplements to minors.

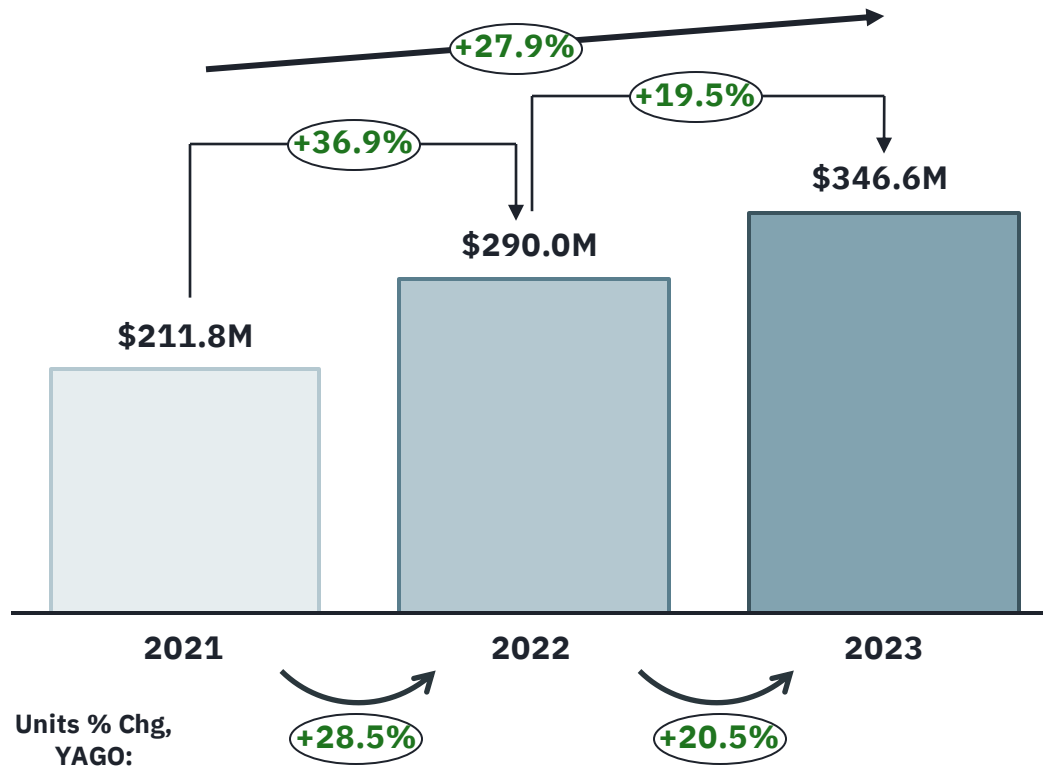
This includes the **ban of sales of creatine** among other ingredients such as green tea extract, raspberry ketone and more, **specifically to teens**. The rationale behind the bill suggests that these dietary supplements that are marketed for weight management and muscle building can lead to **eating disorders** in teens.

# Pre-workouts: Looking For That Edge In Your Day-To-Day

The boom in **education for supplements** originally thought to be relegated to athletes and bodybuilders, has **catapulted categories like pre-workouts** to the forefront. The category has **expanded to shoppers** who are in the pursuit of a more **active lifestyle** and for **anyone** looking for an extra boost for their exercise session or everyday routine.

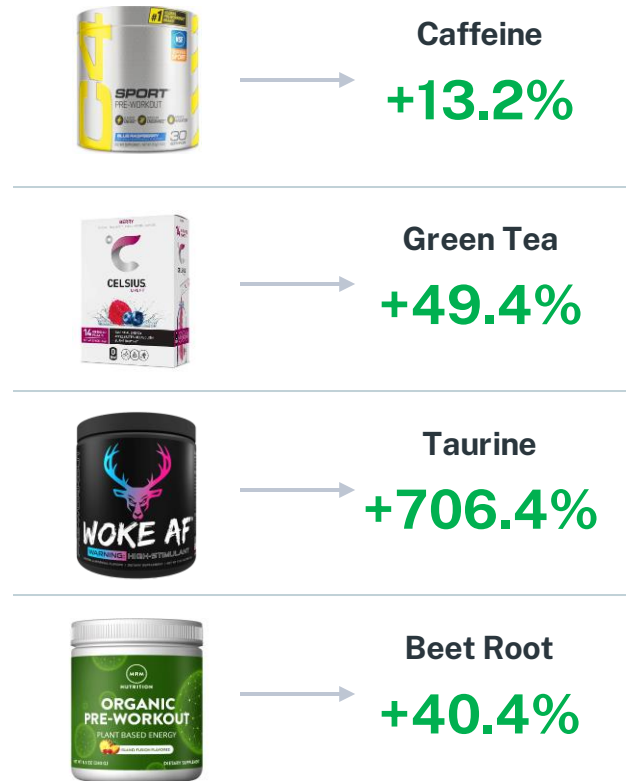
## Sales Volume Growth of Pre-Workouts

Dol % Chg, CAGR, Unit % Chg, vs YAGO



## Ingredients Found in Pre-Workouts

Dol % Chg vs YAGO



## The Evolution of Pre-Workouts

Pre-workout powder is re-imagining and re-defining its role for the “digitally native consumer”, according to a recent webinar from Nutrition Integrated.<sup>1</sup>

From 2020 onwards, Pre-Workouts have continued to grow in the market as more people have gravitated towards a more active lifestyle, specifically the younger generation, influenced by ongoing trends and social media influencers.

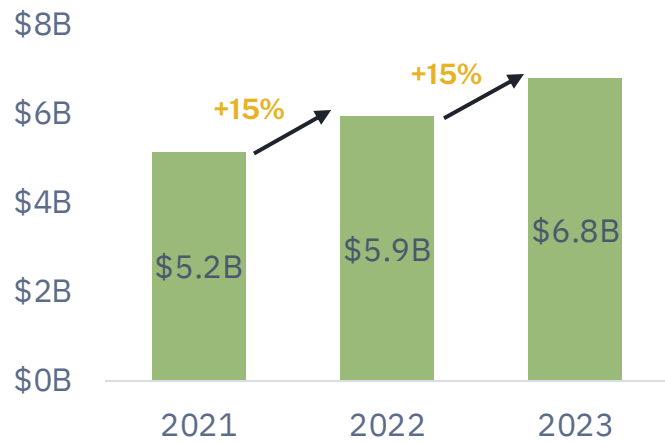
While powder formats are the most popular for pre-workouts, other formats such as pills, capsules, on-the-go powder sticks and energy drinks are all becoming increasingly popular depending on the lifestyle of the shopper.

1: Source: [https://www.nutraingredients.com/Article/2023/06/16/The-evolution-of-pre-workout-powder-for-the-digital-generation?utm\\_source=copyright&utm\\_medium=OnSite&utm\\_campaign=copyright](https://www.nutraingredients.com/Article/2023/06/16/The-evolution-of-pre-workout-powder-for-the-digital-generation?utm_source=copyright&utm_medium=OnSite&utm_campaign=copyright)

# Pre-workout to Energy Drinks

Pre-workout brands entered the energy drinks category, grabbing market share from established brands as adults look for new ways to get caffeinated

### Sales Volume Growth of Energy Drinks



Units % Chg, YAGO:

2021 to 2022: +8%

2022 to 2023: +7%

### The Different Eras of Energy Drinks



Early 90s: Extreme Sports & Partying



2010s: Fitness as a lifestyle



2020s: Nostalgia and the digital age

Does anyone remember *that* era of Monster and Red Bull? From dirt trucks to extreme sports and even to the nightlife scene, energy drinks had an **image**, and it isn't the one they have today.

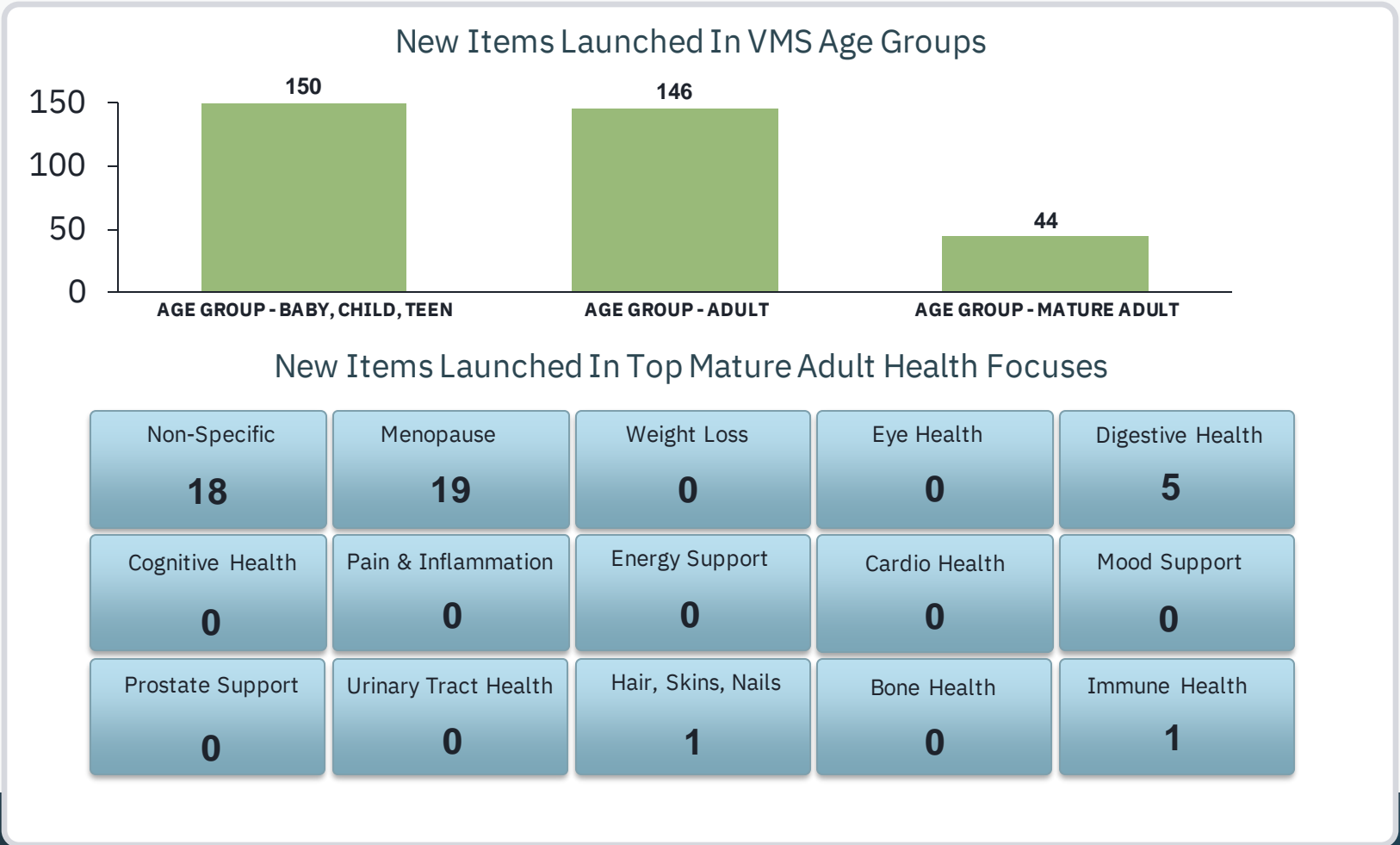
Energy drinks have **evolved** over the years with some brands having more of a fitness image associated with it. From brands like C4 turning their **popular pre-workout into energy drink** equivalents to brands like Celsius that said energy drinks can be **zero calories** and are perfect to pair with your yoga or workout session. Suddenly, with this fresh take, it was a whole new world.

The next iteration on energy drinks comes from young brands perhaps targeted towards **younger adults**. Brands like Ghost gained notoriety with its nostalgically flavored Sour Patch supplements for gym-goers and gamers alike which they then created energy drink equivalents of.

Then comes brands like Prime which many can't deny is a **marketing powerhouse** with influencer founders behind them that have hype and FOMO marketing on lock.

# White Space Advantage: Maximizing Opportunities for 50+

Nearly **80% of American Adults 55+ consume dietary supplements**, and yet there has been roughly one third of the innovation in this segment compared to other age groups. As the population ages and focuses more on health span, **VMS brands can play a critical role in helping them achieve healthy aging.**



By 2024, it is estimated that the **population of individuals aged over 65 years will outnumber those under the age of 15.** This trend means new demand for a focus on healthy aging.

The 55+ demographic controls 70% of consumer wealth and is responsible for more than 40% of consumer spending in the United States. Yet **despite their size and buying power, older adults are largely ignored.** With their needs changing as they get older, **there is a great opportunity to develop products that solve these unmet needs and bridge gaps** in understanding while driving significant incremental revenue.

**{ The Aging Gap }**  
*(noun)*

The unmet needs that exist between current product and service offerings and the (currently ignored) functional and emotional needs of older adults.

age of majority

# Decoding The Differentiators Of Vitamins & Minerals For People 50+

Mature Adult Multivitamins contain higher amounts of certain ingredients to support dietary & nutrient deficiency gaps. This includes B-12 for **energy metabolism**, Vitamin C to support **immune health**, Vitamin D & Calcium to promote **bone health**, Magnesium for **cognition, muscle & heart support**, and Omega 3's for **brain, heart, eye & joint**. Consider **gender-specific products to meet individual needs** (VMS products for those 50+ labeled as 'Male' or 'Female' both grew +5% while 'Non-Specific' products fell -18%).

**B12**  
 •Men Age 51+: 2.4 mcg every day  
 •Women Age 51+: 2.4 mcg every day



**VITAMIN C**  
 •Men Age 51+: 90 mg every day  
 •Women Age 51+: 75 mg every day



**VITAMIN D**  
 •Men Aged 51-70: 15 mcg every day  
 •Women Aged 51-70: 15 mcg every day



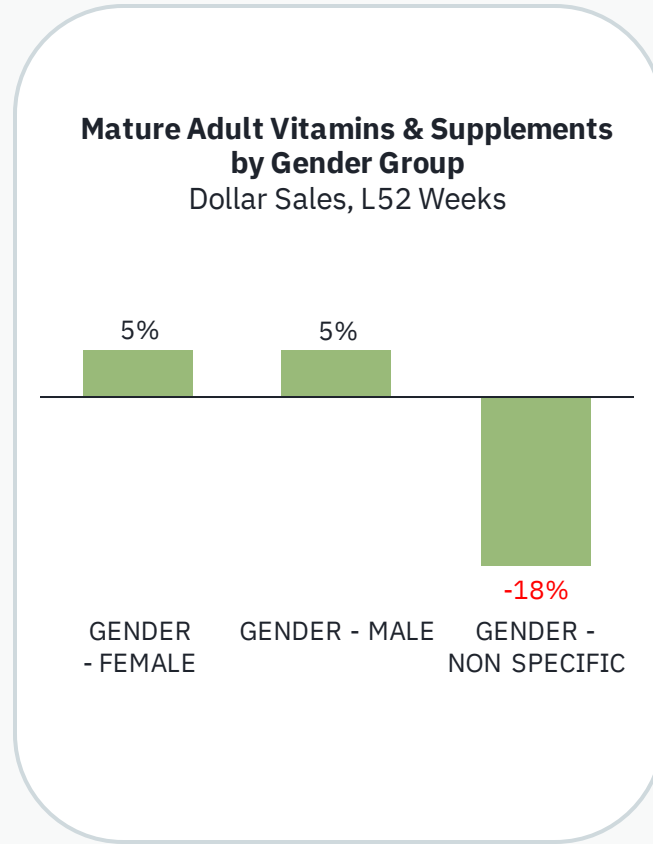
**CALCIUM**  
 •Men Aged 51-70: 1,000mg every day  
 •Women Aged 51+: 1,200 mg every day



**MAGNESIUM**  
 •Men Age 51+: 420 mg every day  
 •Women Age 51+: 320 mg every day



**OMEGA 3**  
 •Men Age 51+: 1.6 g every day  
 •Women Age 51+: 1.1 g every day



\*Age Group Mature Adult - Products marketed for use by older or mature adults (50+)

Source: <https://www.nia.nih.gov/health/vitamins-and-supplements/vitamins-and-minerals-older-adults>  
 Source: [https://healthnews.com/nutrition/vitamins-and-supplements/what-supplements-do-older-adults-need-to-take/#google\\_vignette](https://healthnews.com/nutrition/vitamins-and-supplements/what-supplements-do-older-adults-need-to-take/#google_vignette)



## Recommendations:

### Support Healthy Living Throughout All Ages

Vitamins & Supplements brands have an opportunity to play a role in a consumer's life from infancy to mature adulthood. By leveraging 'age' as a label claim, brands can help get their products in more hands and improve health outcomes. When formulating products that resonate with specific age groups, keep in mind:

- Current social media trends
- Emerging research on mental health and other health concerns
- Latest research and consumer sentiment on functional ingredients
- Opportunities to educate shoppers on their unique supplement needs

By acting as a partner throughout the aging process, brands can create shopper loyalty and trust for life.

# 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

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