



WHAT'S SUPP?

# What are the top trending “holy grail” supplements?

EDITION 3 – 2024



# “Holy Grail” Supplements

Search “Holy Grail Supplements” on TikTok and you’ll be bombarded with thousands of videos promising everything from thicker hair to a faster metabolism.

**More Americans than ever are taking dietary supplements** (74%) and 55% qualify themselves as “regular users”.

But gone are the days of only taking vitamins to fill in nutritional gaps; today’s consumers see **supplements as a way of empowering themselves to take charge of their health and wellbeing.** Hence, the rise of the never-ending search for the next “holy grail”.





# What makes it a “holy grail” product, and where is it heading next?”

We asked our What’s Supp team members to pick their choice of “holy grail” supplements currently in the market.



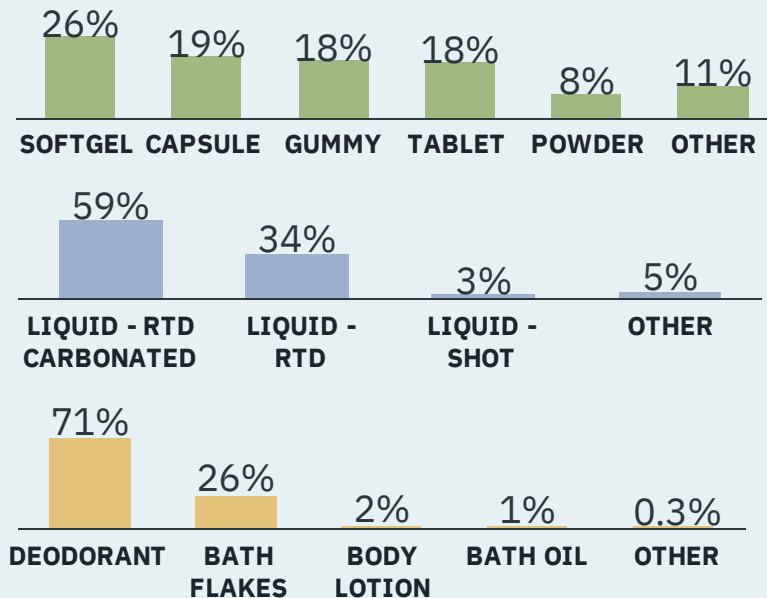
JAIME

# Magnesium: The Mighty Mineral

Magnesium has **extended its reach across departments** - driving growth in VMS & Beverage. Whether you're looking to up your **supplements** game, get an extra health benefit from your **beverage**, or clean up your **body care**, Magnesium might be the solution for you.

## Current Magnesium Consumption Trends

Magnesium Formats Dollar Share



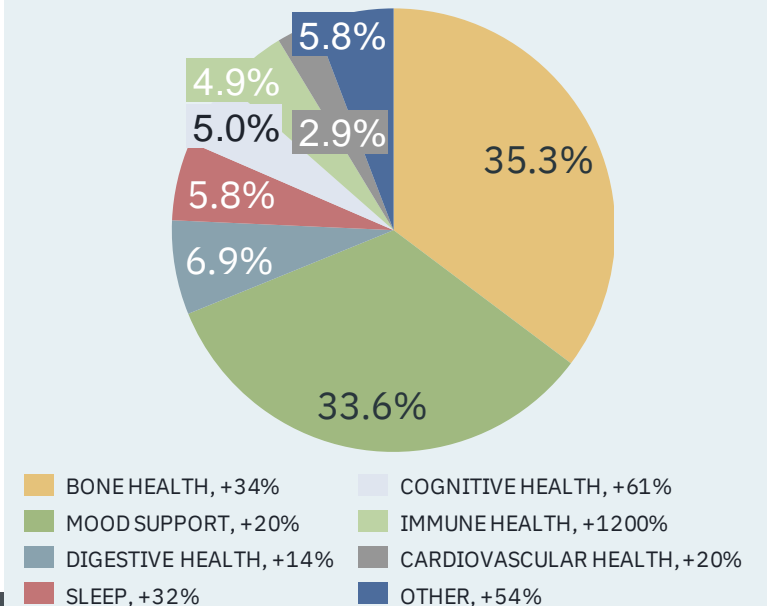
Magnesium Sales by Department

**\$322M | +44.5%**  
**VMS**

**\$9M | +130.7%**  
**Beverage**

**\$8M | -10.4%**  
**Body Care**

VMS Magnesium Health Focus Dollar Share





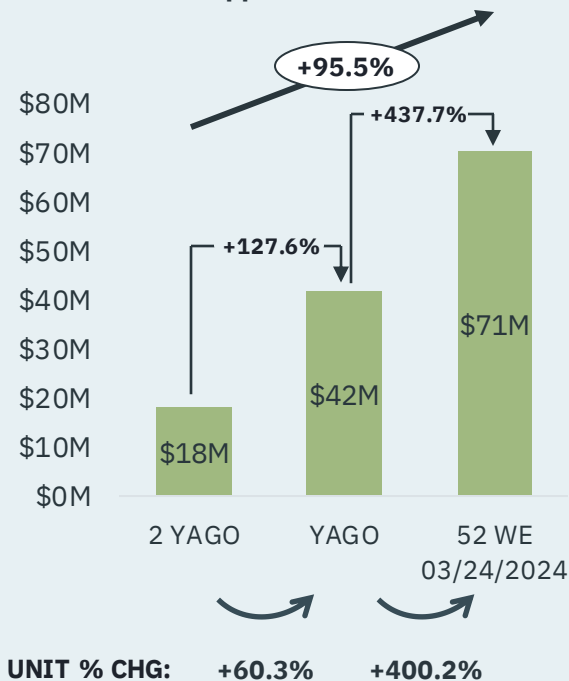


EVONNE


# Creatine: Beyond Exercise Performance

Could the growing use case of **cognitive health** for creatine push sales of the supplement to new heights?

Sales Volume Growth of Creatine Supplements




Marketing Creatine For Cognitive Health



**Be a Brainiac**  
Here's what Genius Creatine can do for you:

- Superior Energy and Muscle Growth
- Boosts Power & Strength
- More Brain Power!



Thorne's Creatine supports muscle strength and size.\* It also promotes muscle performance and enhances cognitive function.\*

Although creatine has historically been used for its benefits in the exercise performance space, recent research points to its ability to maintain **cognitive health** especially in older adults. We've seen brands incorporate this into their copy/advertising alongside the well-known benefits but err on the side of **caution** by leaving it out on their packaging.

If creatine can continue to garner evidence and support for cognitive health, we could see some products **lean in heavy** towards that messaging and away from exercise performance to capture dollar share from that audience. Perhaps some mature adults may resonate with that more than ones that have words like 'exercise' and 'muscle' plastered on the front.

Conversely, we could also see it positioned as a 2-in-1 supplement, hopefully capturing audiences **young and old**. Additionally, there's recent research showing that creatine could help with **mood support** too, in the future it could be positioned as a **3-in-1 supplement**, with exercise performance, cognitive health and mood support all accounted for.



# Creatine: Is beverage the next evolution?

Prebiotics and Fiber have recently found success in the growing digestive health soda niche.

Can **creatine** gain traction in a beverage form?

## POWDER



## CHEWABLES



## GUMMIES



## BEVERAGE



Creatine's most popular form is **powder**, but it has also seen success in other forms such as caps/pills, chewable tablets, etc.

Gummies are typically one of the most consumer-friendly ways to attract people who are **new to the category**. Think melatonin gummies or prebiotic gummies. Now, we see numerous creatine gummy brands enter the market.

However, one of the rising delivery methods for the masses is a **beverage**. As of late, we've seen prebiotic sodas, or sodas targeting gut health in general, see phenomenal growth in sales, making a successful **cross-over** from the VMS category to beverage. This begs the question, ***could we see creatine in beverages, and will it be successful?***

There are currently a few creatine beverage products on market, but companies are still working on making creatine more **stable** in solution.

Since many tend to take creatine with their protein shake – maybe the **next** evolution could be a protein drink with creatine in it.



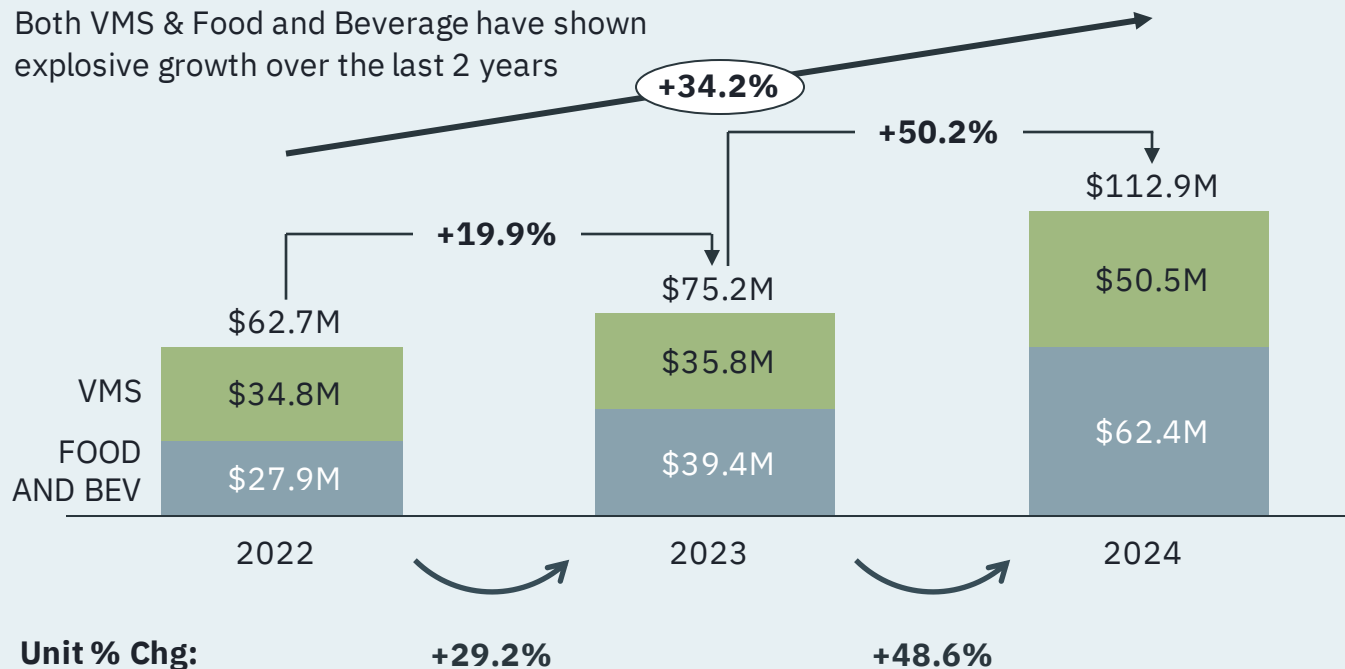
BRE

# Mushrooms: Functional Fungi

Many of us have most likely been served a social media ad for a Mushroom supplement or stumbled upon a Mushroom product in the grocery aisles recently. Functional Mushrooms are becoming increasingly popular for their **superfood qualities** and **wide range of health claims**, from Cognitive to Immune and everything in between.




## Functional Ingredient – Mushrooms

Both VMS & Food and Beverage have shown explosive growth over the last 2 years



## Mushrooms Across The Store

Products can now be found in nearly ~20% of subcategories across VMS & Food and Bev, although The top 3 make up ~50% of sales and are still growing

	Dollar Share	Share Chg.	Dollar Growth
 HERBAL SINGLES A TO Z	19.0%	-1.3	+41%
 FUNCTIONAL BEVERAGE OTHER	18.0%	+4.8	+102%
 SS COFFEE BEANS AND GROUND	11.0%	+0.7	+60%



# Mushrooms: Lions Mane, Cordyceps, Reishi, and more

There are several different types of Functional Mushrooms, and they can often be found used in tandem to create multi-benefit products for a one-stop-shop, giving many Mushroom products the “**Holy Grail**” Status



## A Mushroom For Everything

OM’s Master Blend line contains 10 different mushrooms to support immune health, vitality, and stress relief

Mushroom Items  
Containing Lions Mane,  
Cordyceps, & Reishi

\$10M | **+37%**



## Perfect Pairings

Odyssey combines Lions Mane for its cognitive benefits and Cordyceps for its energy boosting properties to craft a balanced beverage

Mushroom Items  
Containing Lions Mane &  
Cordyceps

\$19M | **+59%**



## Shroom Sweet Treats

Alice Mushroom Chocolates use 100% fruiting body mushrooms (nutrient dense, high concentration). Reishi is the star for their item for sleep, Nightcap

Mushroom Items  
Containing Reishi

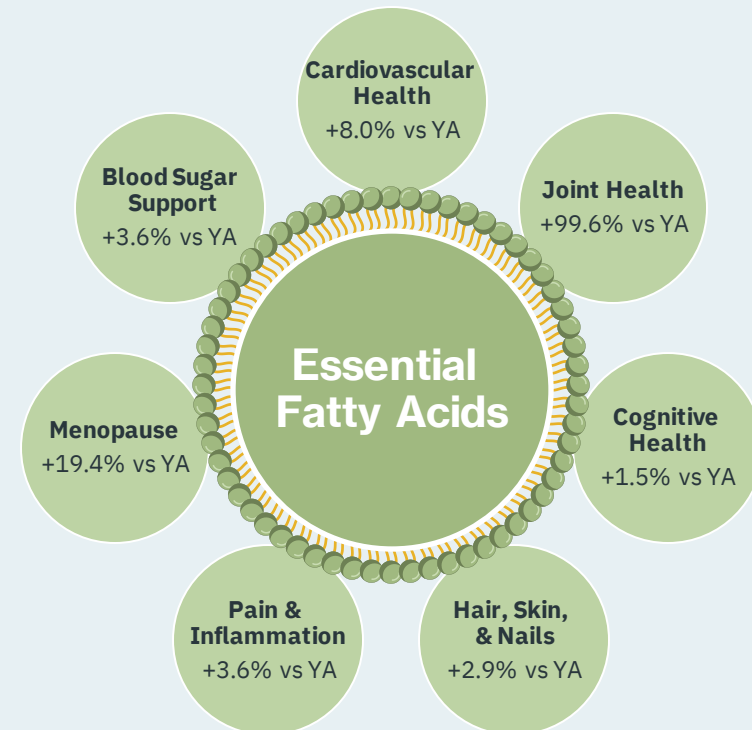
\$42M | **+39%**



CLAIRE

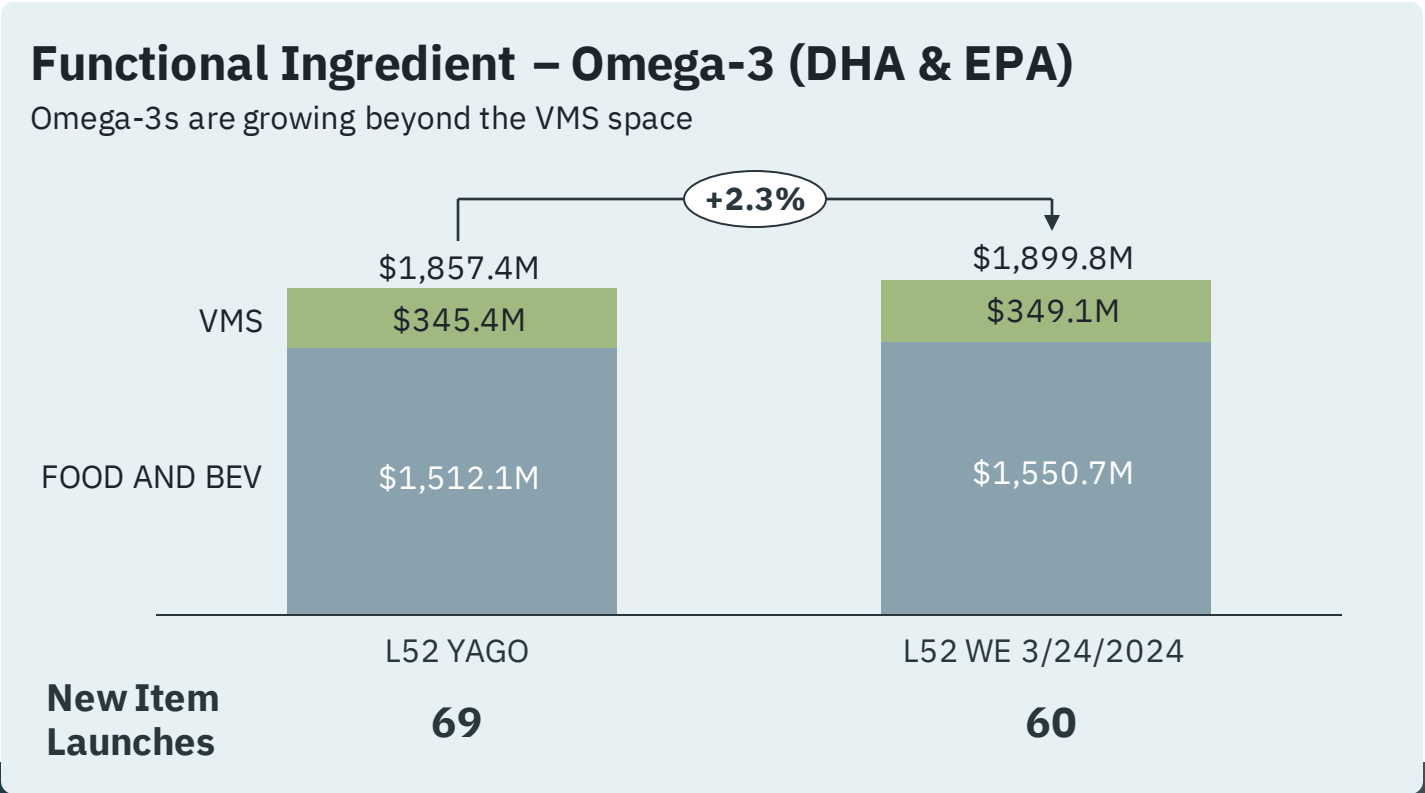
## Essential Fatty Acids: Beyond Cognition

Considered the **#1 brain health supplement**, Fatty Acids & Omega-3s span a variety of health needs. DHA Omega-3s are high in retina & brain, while EPA Omega-3s work to regulate blood flow that can help reduce pain & swelling. While initially geared towards **cognitive** & **cardiovascular** health, **menopause** & **joint health** have taken off as health focuses within the category.



# Essential Fatty Acids: Brain Health for All!

With **8 in 10 Americans affected by brain health issues**, cognitive health is a top priority among consumers. **66%** of Americans reported they are curious about brain health research. Omega-3s have been trending across products geared toward kids, like Ripple Kids' plant-based milk & Brainiac's puree squeezes for toddlers as **early preventative & developmental measures**.





LAURA

# Colostrum: Liquid Gold

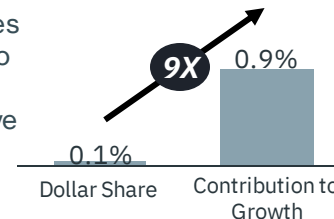
TikTok influencers are turning to **Colostrum**, available in both powder and pill form, for a **variety of health claims like** gut health, increased immunity, and concentrated levels of protein and micro-nutrients.



## What is it?

Colostrum, also known as “**liquid gold**”, is the first milk produced by a mammal after birth and is a rich natural source of macro- and micro-nutrients, immunoglobulins, and peptides with anti-microbial activity and growth factors. Most of the colostrum on the market today for human consumption is sourced from cows.

Colostrum contributes **9X its dollar share** to the growth of the Probiotics & Digestive Aids category



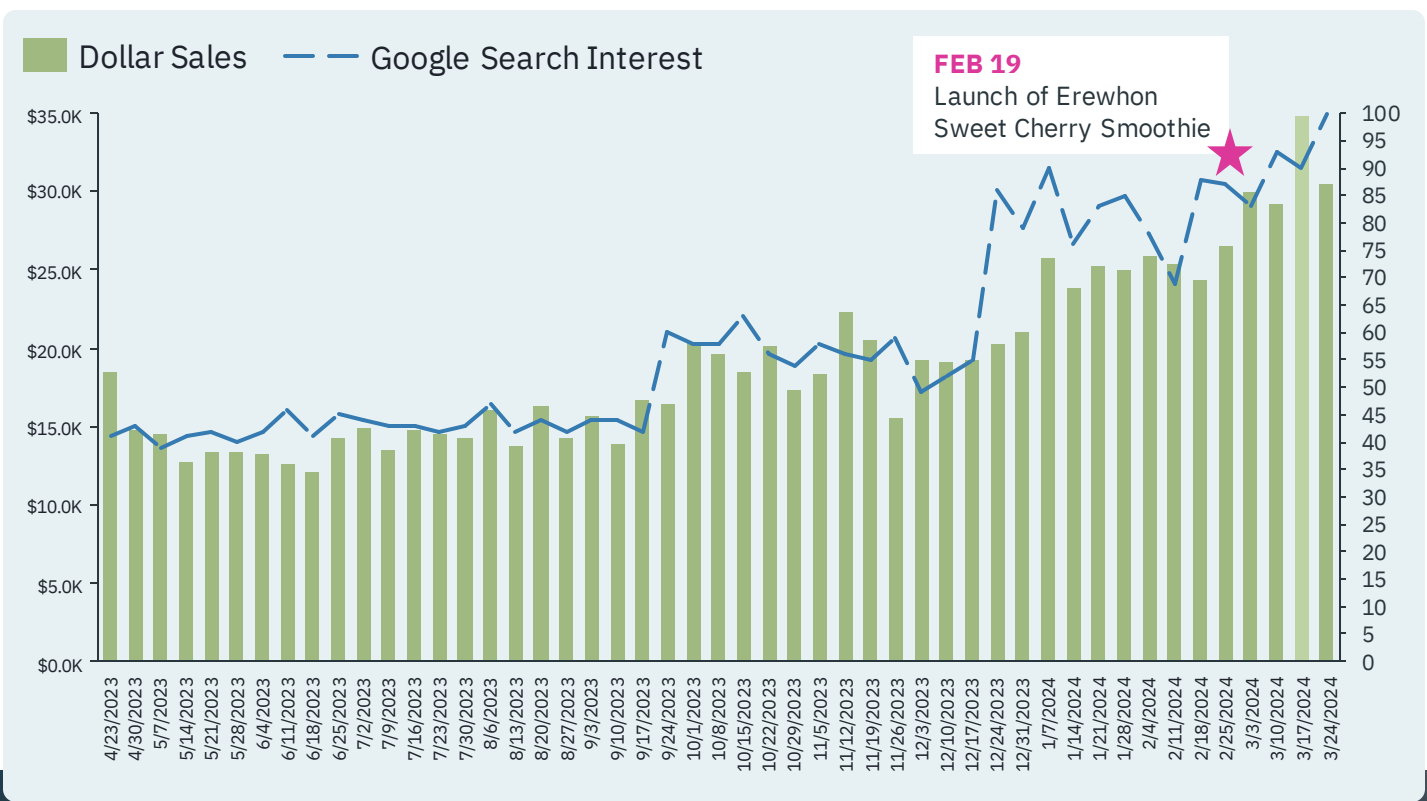
## Benefits of Colostrum

Colostrum is good for **maintaining health** and **preventing disease**. It has many incredible benefits for supporting healthy skin, brain health, and even improving immunity after strenuous exercise. The peptides found in colostrum help regulate your immune system and have natural antibacterial and anti-inflammatory properties. The growth factors can help **repair the thin lining of your gut**; this is important because there are lots of foods and environmental toxins which can destroy or damage the lining that prevents undigested food from getting into your bloodstream.



# Colostrum: The rising star in health supplements

Week-over-week **sales of the superfood continue to grow** as influencers claim everything from a flat stomach to clear skin to immunity boosting as benefits.



The **Sweet Cherry Smoothie** by Sofia Richie Grainge, in collaboration with Erewhon, was debuted on Monday, February 19<sup>th</sup>.

The official ingredients include vanilla Cowboy Colostrum powder, but consumers are substituting with other **colostrum powders** as well.





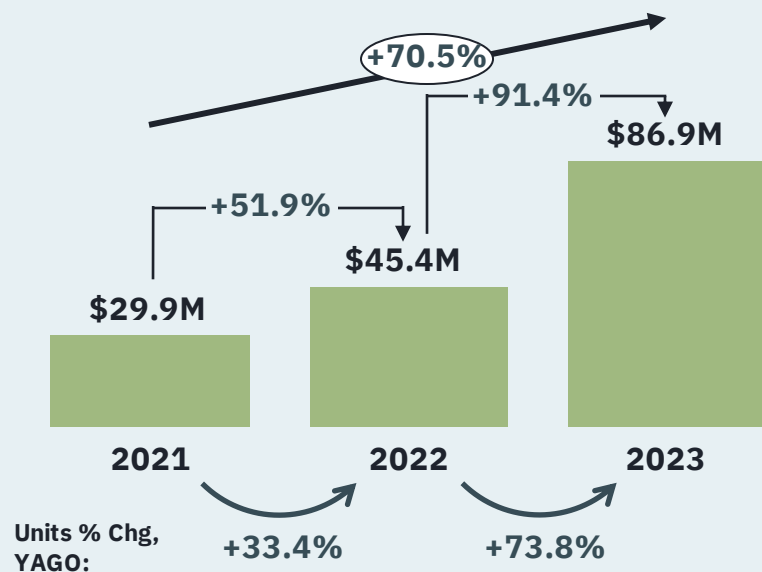
RAHUL

# Beet Root: Harnessing nature's benefits for energy & heart health

Beetroot supplements offer a concentrated source of nutrients found in beets, available in various forms like capsules or powders. They are **rich in nitrates**, which convert to nitric oxide, supporting **cardiovascular health** and **exercise performance**. Additionally, beetroot supplements provide benefits such as promoting **heart health**, **enhancing exercise endurance**, and **aiding in overall well-being**.

## Sales Volume Growth of Beet Root\*

Dol % Chg, CAGR, Unit % Chg, vs YAGO  
52 Weeks Ending 3/24/24



\*SPINS Functional Ingredient Beet Root includes full Beet Products

## Beet Root\* Key Health Focus'

Dol % Chg, Unit % Chg vs YAGO

### Energy support

Dol % Chg

**+105.8%**

Unit % Chg

**+93.0%**

### Cardiovascular Health

Dol % Chg

**+106.2%**

Unit % Chg

**+79.5%**





## Benefits of Beets & Beet Root

- **Increased stamina:** Beetroot can improve heart and lung function during exercise due to the nitric oxide in beets increasing blood flow to muscles, enhancing stamina and performance.
- **Prevention of heart disease and stroke:** Rich in folate, beets support healthy blood vessels, reducing the risk of heart disease and stroke.
- **Lowered blood pressure:** Beets contain nitrates, which convert to nitric oxide, relaxing blood vessels and reducing blood pressure.
- **Enhanced immune system:** High fiber content promotes gut health and supports the growth of beneficial bacteria, boosting the immune system.
- **Improved skin health:** Drinking beetroot juice may reduce inflammation and improve blood flow, benefiting skin health.



# Exploring Variety: Different Forms of Beetroot Supplements

Beetroot supplements are available in various forms for different shoppers including **chews** for convenience, **powders** for dissolvability, and **tablets** & **capsules** for on-the-go consumption. Regardless of the form, beetroot supplements provide a source of nutrients, including nitrates and antioxidants, supporting heart health, energy, and overall well-being.

Gummies & Soft Chews		Powders		Tablets		Capsules	
Dol % Chg	Unit % Chg	Dol % Chg	Unit % Chg	Dol % Chg	Unit % Chg	Dol % Chg	Unit % Chg
+162.7%	+159.1%	+28.7%	+12.6%	+69.0%	+65.7%	+158.5%	+74.8%
<b>Force Factor Total Beets</b>		<b>Humann Super Beets Powder</b>		<b>Dr.Mercola Fermented Beets</b>		<b>Qunol Beets + CoQ10</b>	
Force Factor Total Beets chews offer a blend of nitrates and antioxidants, providing a convenient energy boost for any time of day. Combining beetroot powder and extract with grapeseed extract, they deliver a superfood formula in a delicious açai berry flavor, free from bitter beet aftertaste.		Humann Super Beets Powder is a clinically studied, 100% Non-GMO beetroot supplement formula. Each scoop of SuperBeets Heart Powder promotes nitric oxide production, healthy blood pressure, and heart-healthy energy without caffeine.		Dr.Mercola Organic Fermented Beets offer a whole-food source of nitrates, supporting nitric oxide production for normal circulatory functions, energy, and mental focus. Through a specialized fermentation process, ingredients are pre-digested, making them easier for the body to process while enhancing the nutritional content of the beets.		Qunol Beets + CoQ10 contains a highly absorbable form of ubiquinone, supporting heart health and enhancing energy production, and potentially improving exercise performance. The Blood Pressure Capsules blend natural ingredients like beets, CoQ10, and grape seed extract to promote healthy blood pressure levels.	
							

Product Captions from Brand Websites

# Summary of Findings

What elevates a supplement to “holy grail” status? According to our experts, some characteristics of these jack of all trade products include:

**Multitasking** – they tackle multiple health focuses

**Versatility** – they come in a variety of forms

**Availability** – they can be found across departments

**Virality** – they have taken the Internet by storm

The rise in these types of products highlights current consumer sentiment: vitamins & supplements are a form of empowerment to take charge of health and wellbeing.

So, what’s the next “holy grail”? **Time will tell!**



# Meet The 'What's Supp' Newsletter Team



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