



State of the Industry

Vitamins & Supplements + Sports Nutrition 2024

CREATED BY THE SPINS
RETAIL INSIGHTS TEAM





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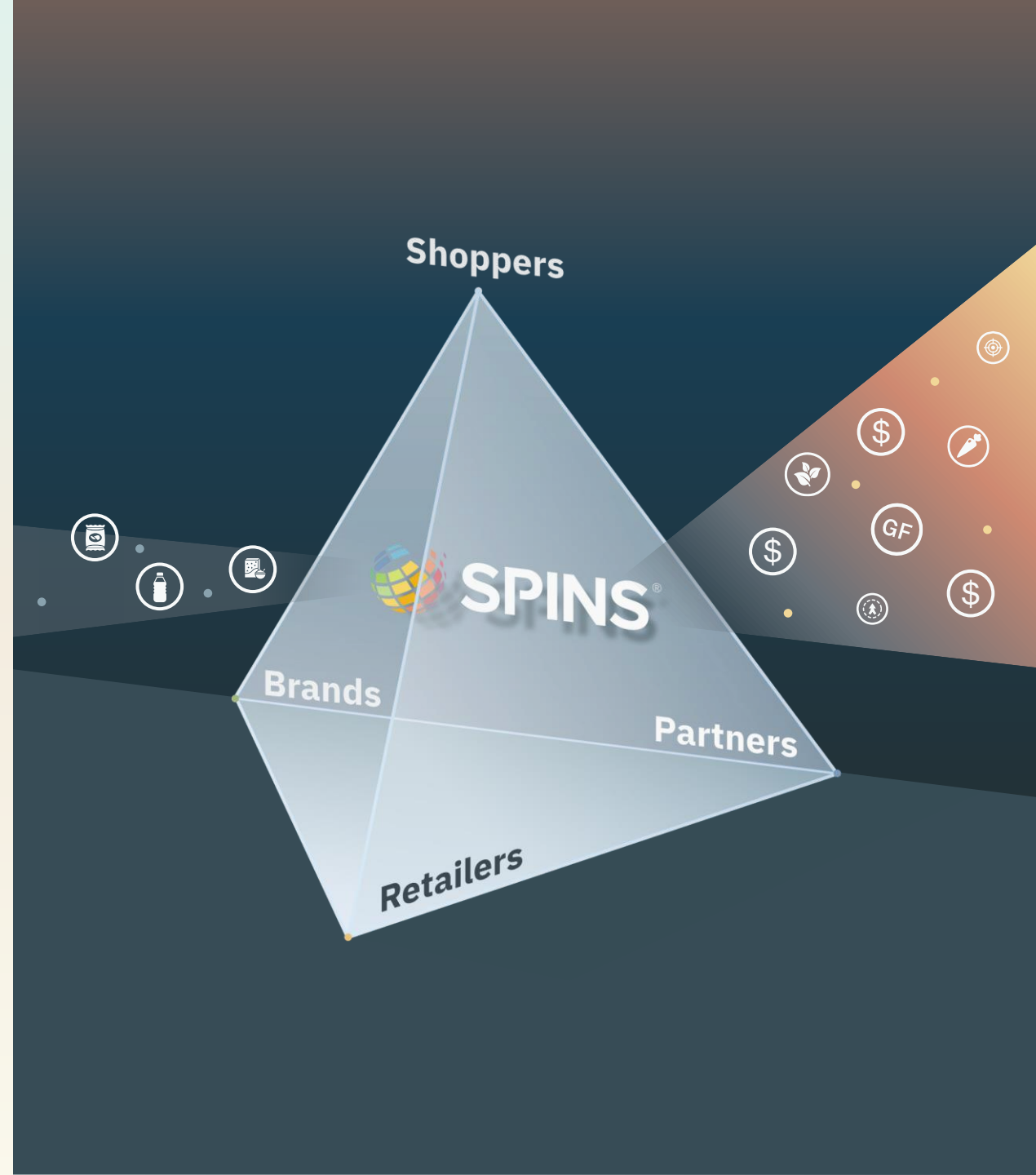
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Connecting **Shopper Values** to **Product Innovation**

SPINS helps **shoppers** find products that match their preferences by helping:

- ✓ **Retailers** get the right assortment on their shelves
- ✓ **Brands** innovate and tell their story
- ✓ **Ecosystem partners** better serve their customers



VITAMINS & SUPPLEMENTS

Overview

**State of the Industry: Vitamins & Supplements
+ Sports Nutrition 2024**

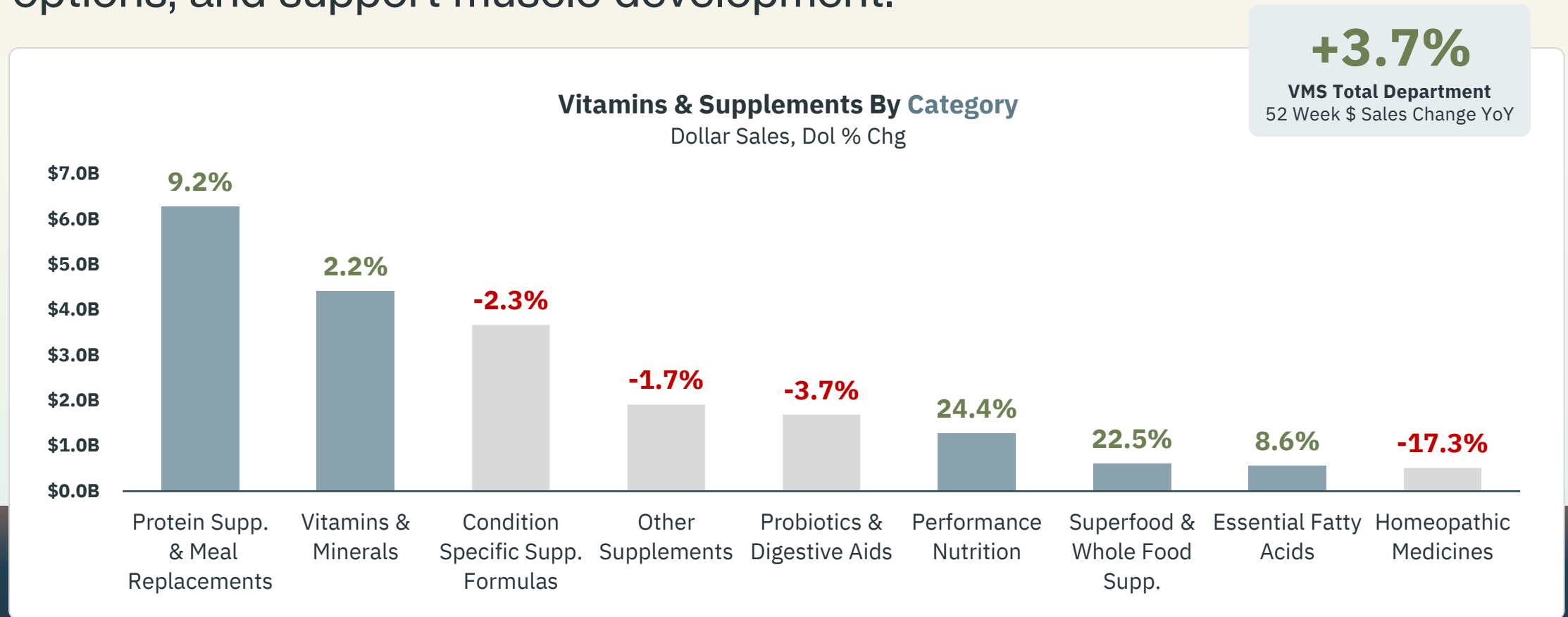


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Shoppers are prioritizing holistic and fitness-oriented supplements that enhance physical performance, provide natural and nutrient-dense options, and support muscle development.



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

CONDITION SPECIFIC SUPPLEMENT TRENDS

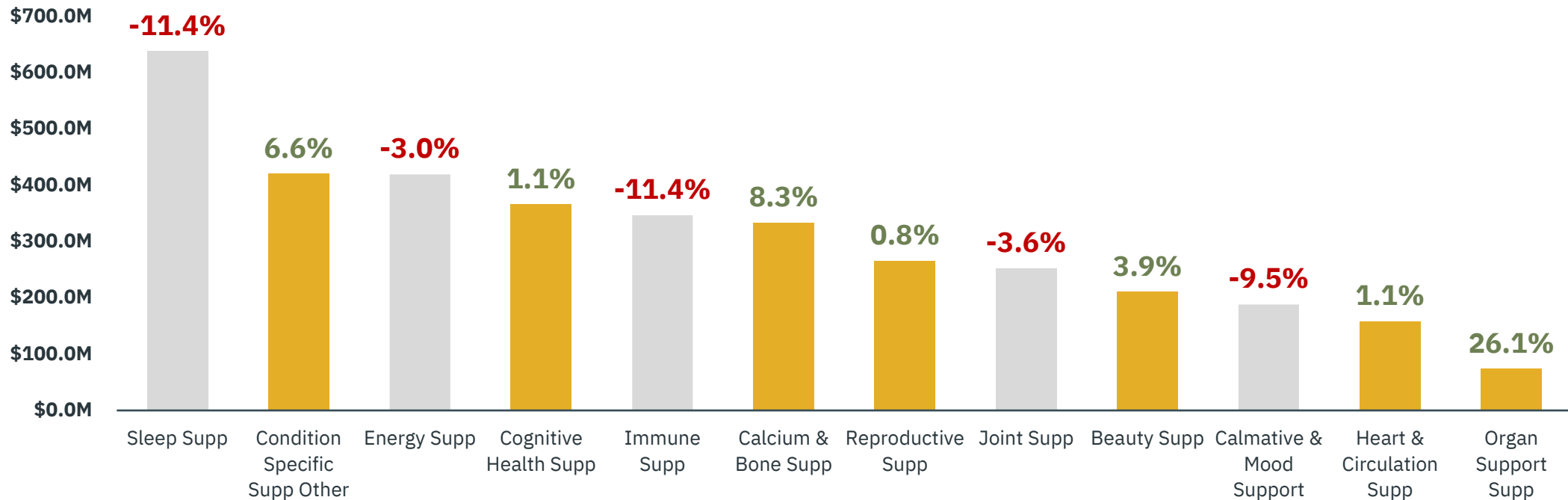


The growth in **cognitive health, calcium & bone, reproductive, beauty, heart, and organ support supplements** reflects increasing shopper focus on preventative health and longevity.

-2.3%

Condition Specific Supplements
52 Week \$ Sales Change YoY

Condition Specific Supplements By Subcategory
Dollar Sales, Dol % Chg



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

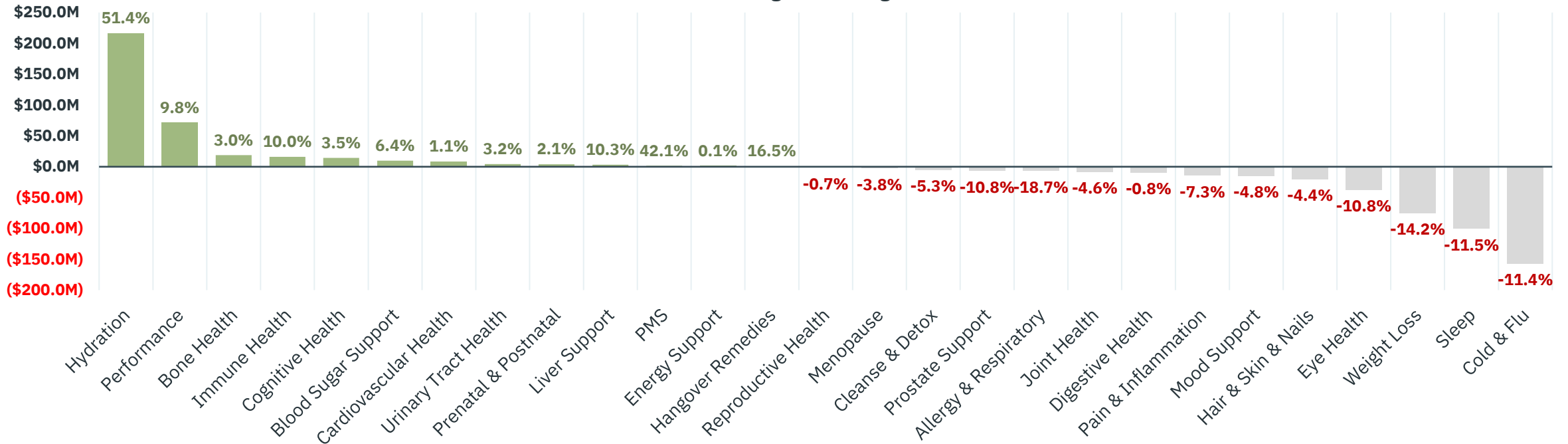


Shoppers remain dedicated to health areas of Performance Nutrition, enhancing everyday and athletic performance, and prioritizing organ support for overall well-being.

+3.7%
VMS Total Department
 52 Week \$ Sales Change YoY

Vitamins & Supplements By Health Focus Attribute

Abs Dol Chg, Dol % Chg



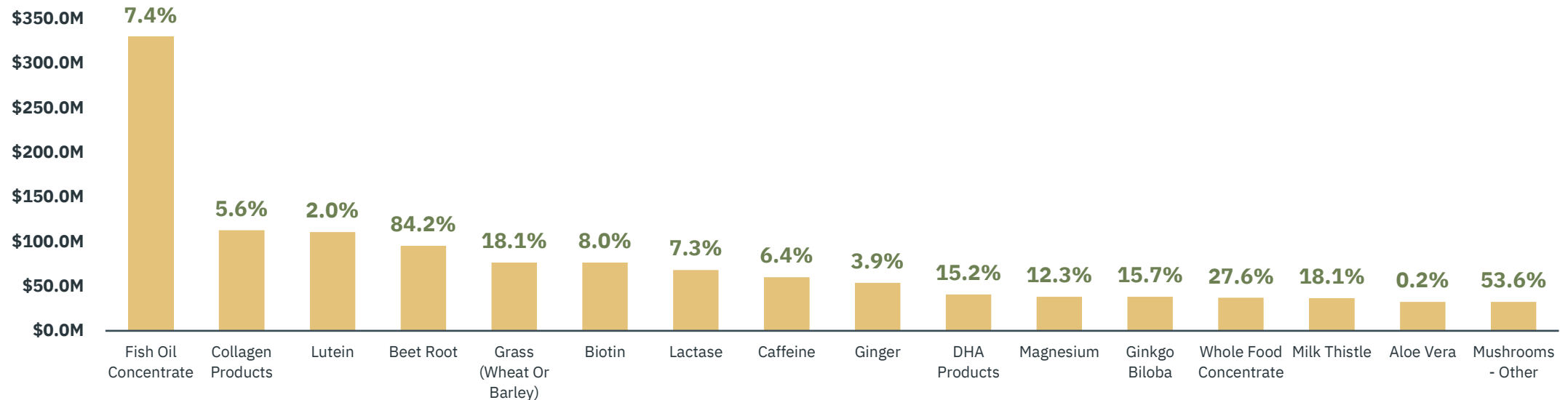
* % Represents % Change YoY (vs same time LY)



There is continued growing popularity in functional ingredients targeted towards health benefits ranging from cardiovascular & brain/memory health, digestive aids, and energy support.

Top 15 Functional Ingredients Reporting Growth in Latest 52 weeks

Condition Specific, EFA's, Probiotic + Digestive Aids, Super & Whole Food, Other Supplements
Categories by Functional Ingredient
 Dollar Sales, Dol % Chg



*Excluded: Vitamins & Minerals, Homeopathic, Performance Nutrition, and Protein Supplements Categories

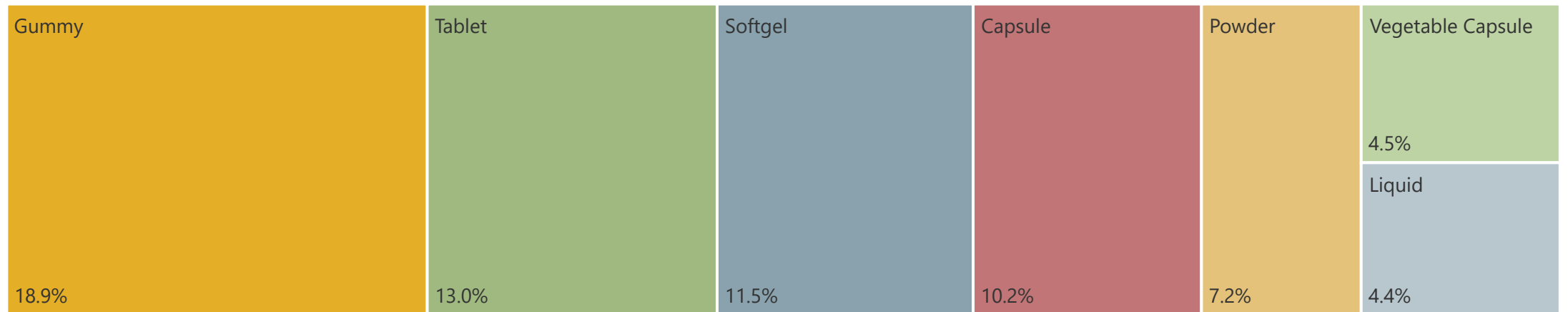
* % Represents % Change YoY (vs same time LY)

LEADING PRODUCT FORMS WITHIN VMS



Shoppers prefer softgels, capsules, powders, and vegetable capsules due to enhanced absorption, customizable dosing, convenience, and suitability for dietary restrictions.

Top Product Forms by Dollar Share



Dol % Chg:	-6.1%	-0.9%	+3.2%	+2.0%	+8.0%	+3.3%
Unit % Chg:	-8.0%	-5.6%	-1.1%	-2.2%	+1.4%	+1.5%
Form:	Gummy	Tablet	Softgel	Capsule	Powder	Vegetable Capsule

**Excluded: Protein Supplements and Performance Nutrition Categories, Uncoded Products*

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

VITAMINS & SUPPLEMENTS

Industry Trends

**State of the Industry: Vitamins & Supplements
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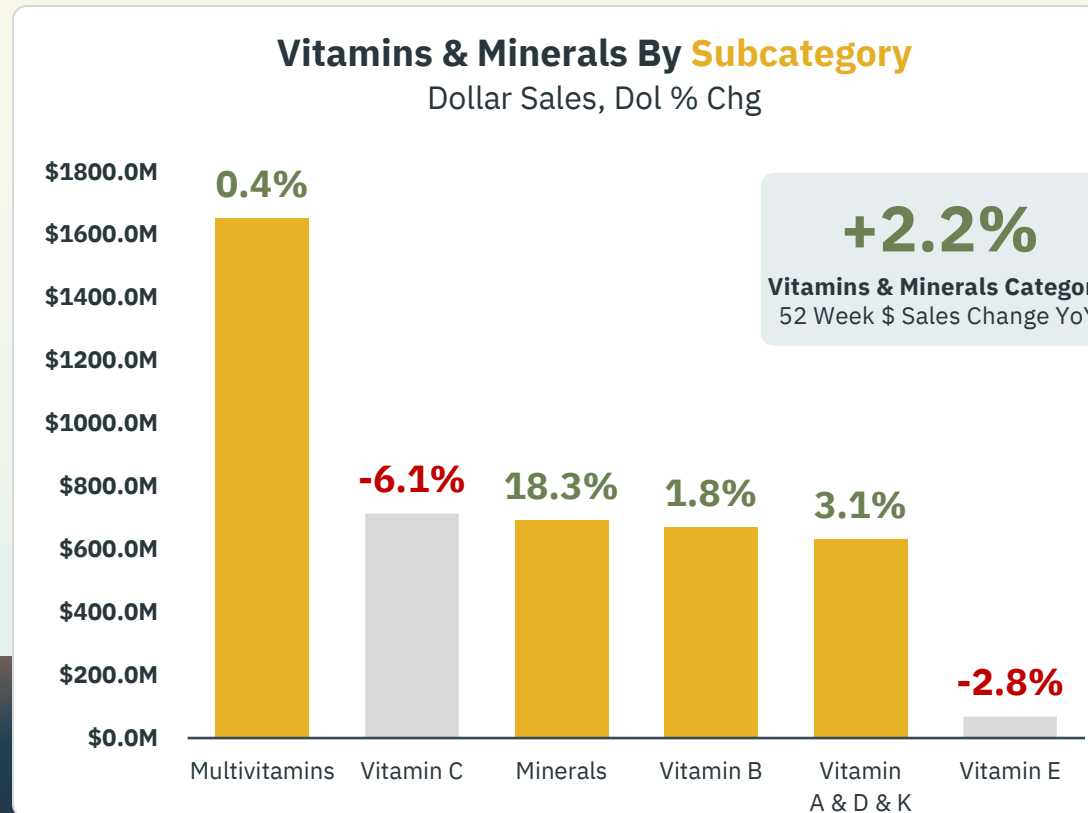
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WHOLE BODY: BUILDING FOUNDATIONS FOR LONG-TERM HEALTH & LONGEVITY



The steady growth in Multi-Vitamins, Minerals, Vitamin B and Vitamin's A/D/K show **shoppers seeking supplements that support immune function, vision, heart, muscle, and bone health.**



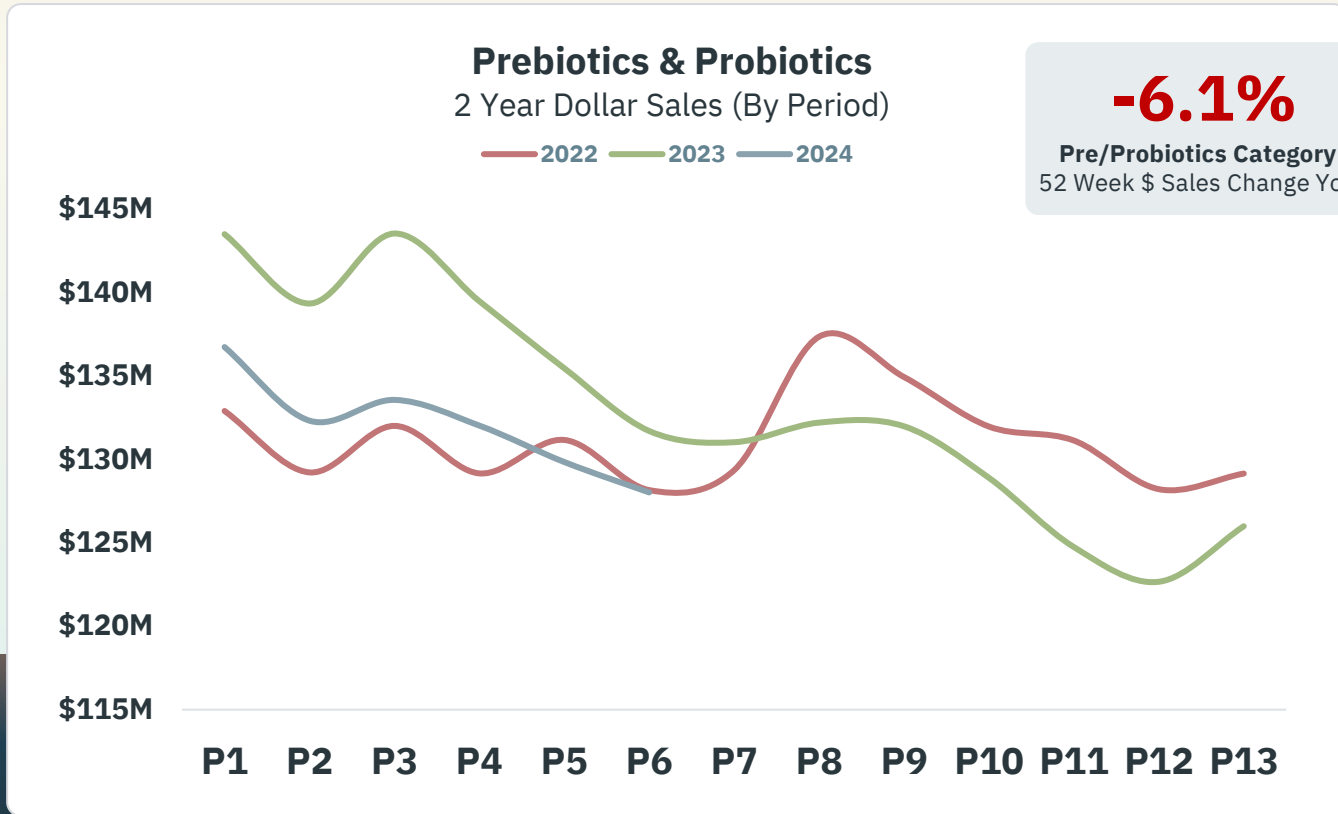
Vitamins & Minerals Key Functional Ingredients

Functional Ingredient	Dollar Sales	Dollar Sales % Chg	Unit Sales % Chg	Example Product
Magnesium	\$293.3M	+40.9%	+28.5%	
Vitamin K	\$25.7M	+44.9%	+46.8%	
Folic Acid (Folate)	\$15.5M	+24.5%	+4.3%	
Vitamin A - D - K	\$12.2M	+32.3%	+28.2%	


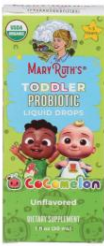

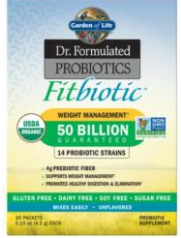
* % Represents % Change YoY (vs same time LY)



Although probiotics have trailed in the latest 52 weeks, dollar share remains steady year over year, with shoppers consistently incorporating them into their supplement routines.



Probiotic Forms

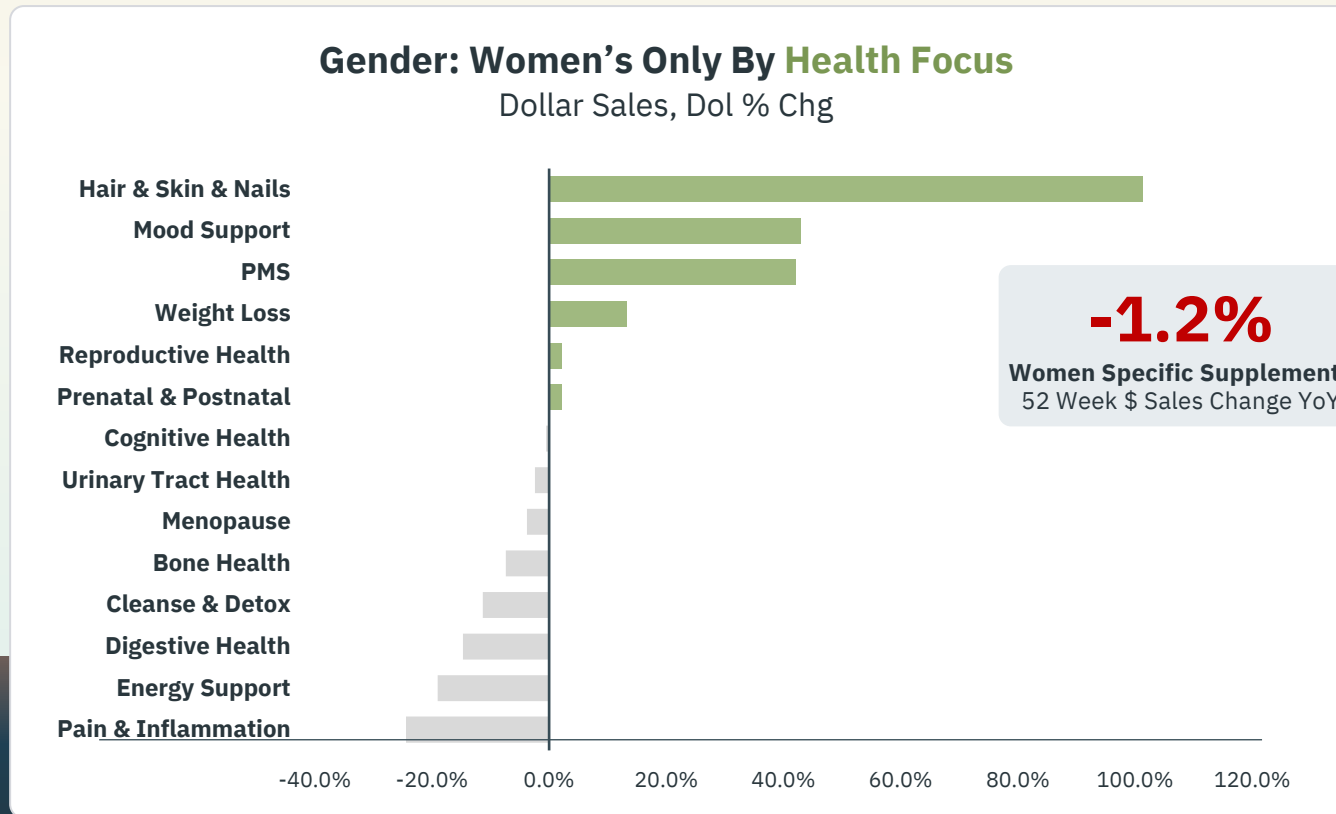
 Capsules	 Liquid
 Gummies	 Powder

*P = Period, represents 4 Weeks Starting January * % Represents % Change YoY (vs same time LY)





WOMEN'S HEALTH: TRENDS & PRIORITIES IN VMS



Despite an overall market decline, Women's health supplements are seeing strong growth in key areas including **beauty, mood support, premenstrual syndrome, and weight loss.**



Women's Specific Health Focus'

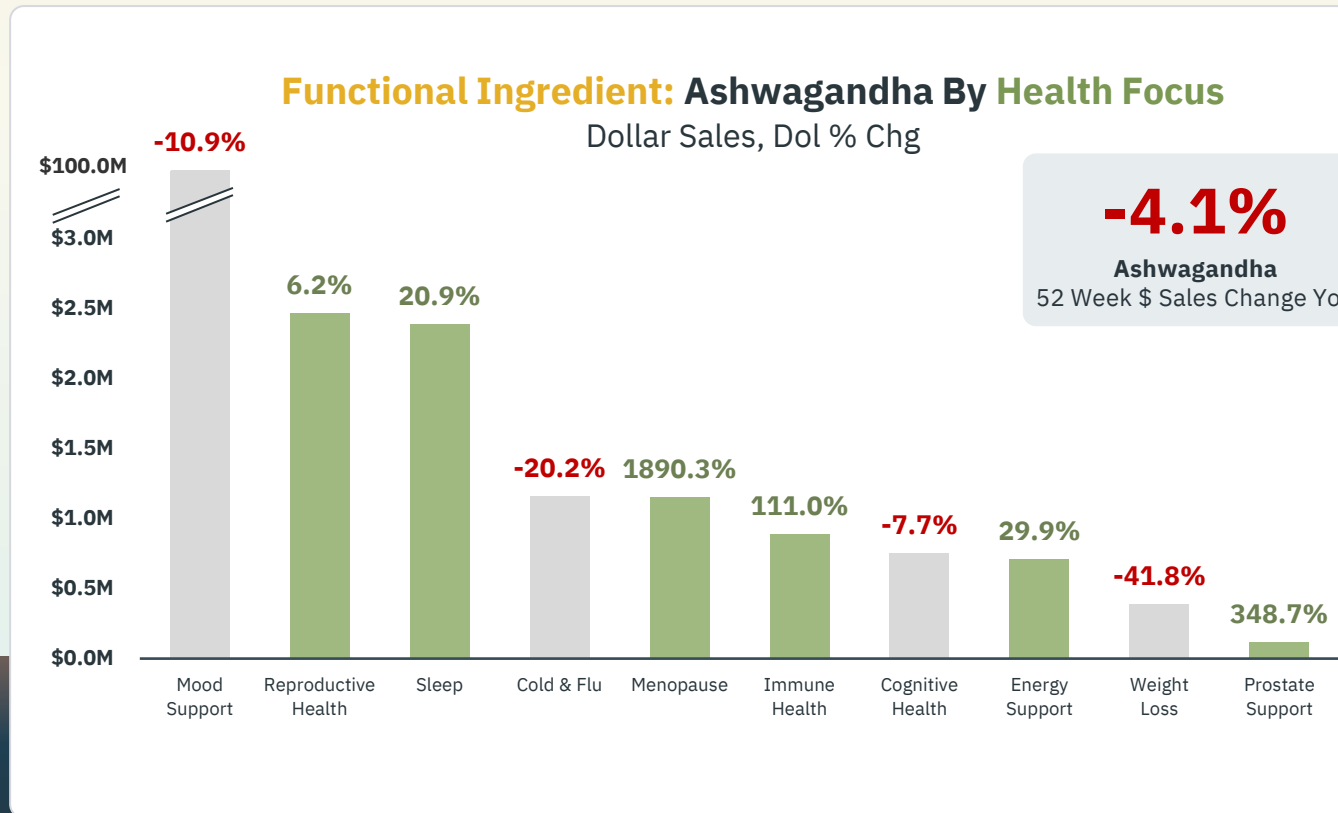
 <p>Hair & Skin & Nails</p>	 <p>Mood Support</p>
 <p>Premenstrual Syndrome</p>	 <p>Reproductive Health</p>

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

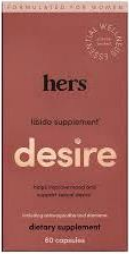


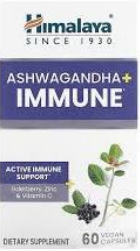
ASHWAGANDHA: THE ANCIENT HERB FOR MODERN WELLNESS



As the focus on holistic wellness grows, **consumers are increasingly turning to Ashwagandha** for its benefits in women’s health, sleep, and immune support formulas.



Ashwagandha Health Focus'

 Reproductive Health	 Sleep
 Menopause	 Immune Health

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

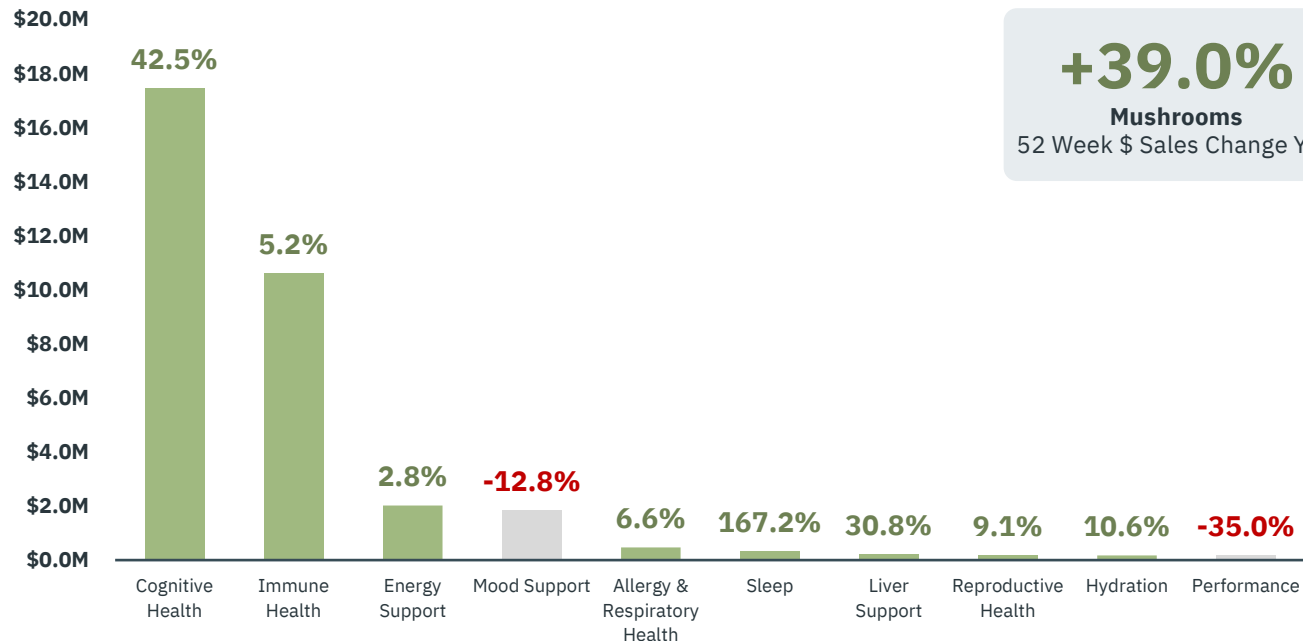
MUSHROOMS: UNLOCKING HEALTH & WELLNESS BENEFITS



Mushrooms remain a major health trend as consumers increasingly look for formulas that support cognitive function and boost immunity.

Functional Ingredient: All Mushrooms By Health Focus

Dollar Sales, Dol % Chg



+39.0%
Mushrooms
52 Week \$ Sales Change YoY

Mushroom Health Focus'



Cognitive Health



Immune Health



Mood Support



Allergy & Respiratory Health

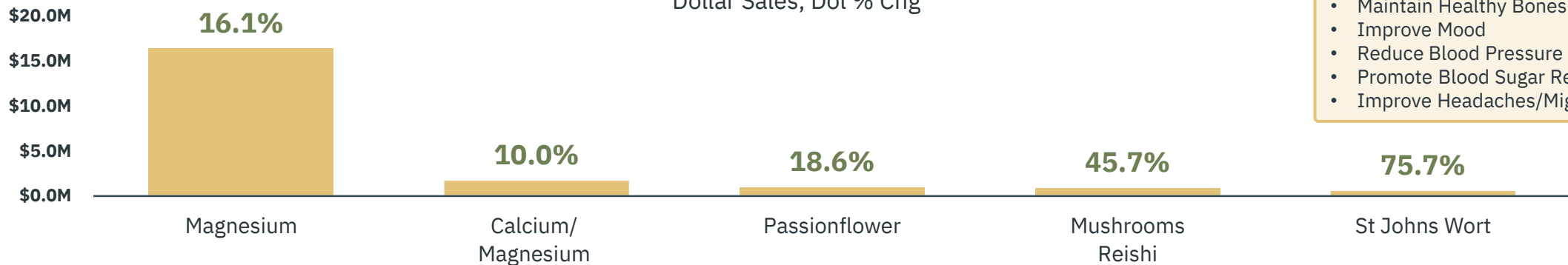
* % Represents % Change YoY (vs same time LY)



Magnesium continues as a holy grail supplement, accounting for 27% of growth within growing sleep, calmative, and mood supplement subcategories due to its variety of benefits

Sleep, Calmative and Mood Support Supplements By Functional Ingredient

Top 10 Functional Ingredients Reporting Growth in Latest 52 weeks
Dollar Sales, Dol % Chg



- Magnesium Benefits May Include:**
- Sleep Aid
 - Maintain Healthy Bones
 - Improve Mood
 - Reduce Blood Pressure
 - Promote Blood Sugar Regulation
 - Improve Headaches/Migraines

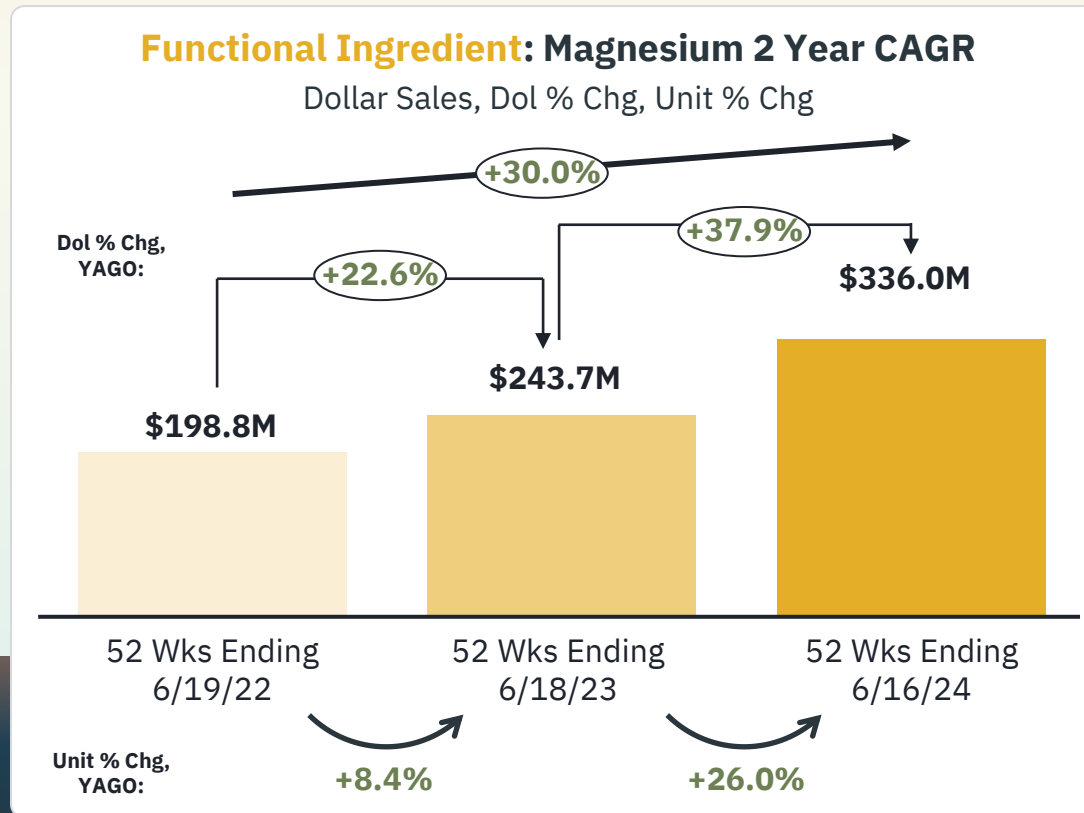
EXAMPLE PRODUCTS



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



Magnesium supplements are vital for supporting numerous bodily functions including **muscle and nerve function, bone health, mood & sleep support, energy production, and digestive health.**

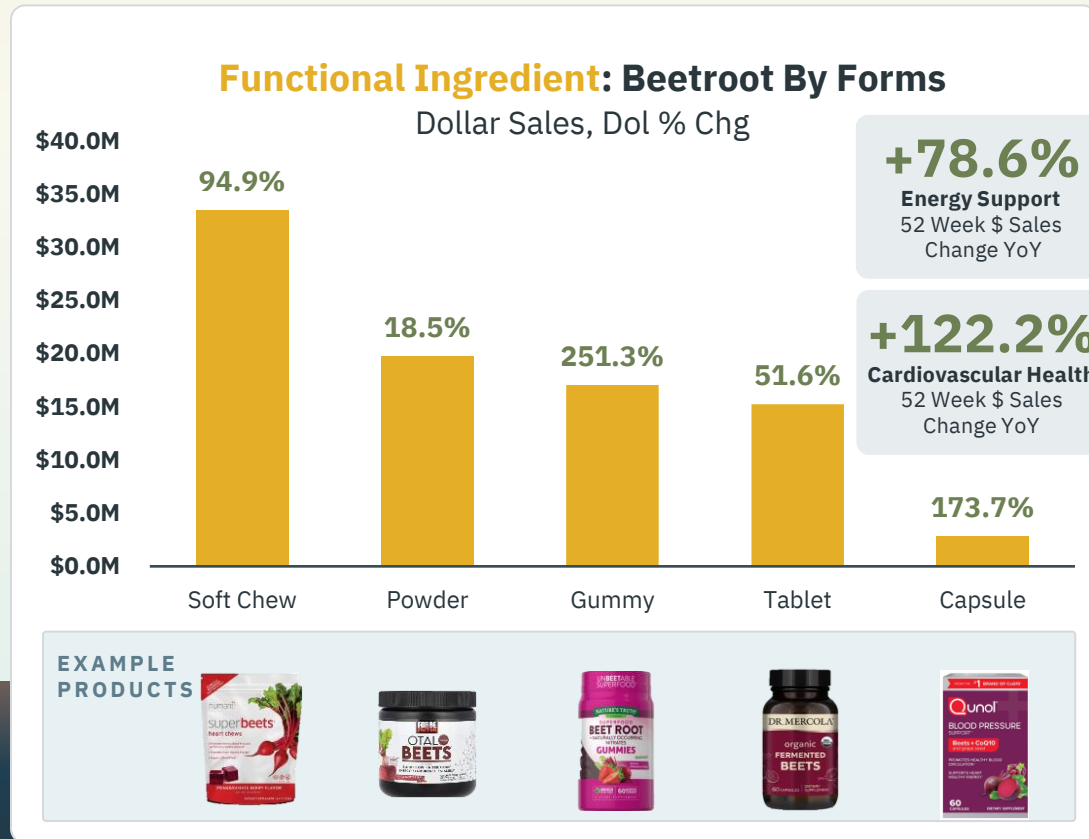


Magnesium: Top Health Forms

Health Focus	Dollar Sales	Dollar Sales % Chg	Unit Sales % Chg	Example Product
Bone Health	\$44.5M	+27.8%	+2.0%	
Mood Support	\$42.5M	+17.6%	+12.3%	
Digestive Health	\$8.3M	+9.0%	+10.2%	
Sleep	\$7.8M	+28.3%	+9.5%	



Beetroot continues to drive growth with its many whole-body health benefits.



Beetroot Breakdown

Nutrient	Function	Benefits
Folates	Supports cell growth & function Protect blood vessels from damage	Reduces the risk of heart disease and stroke
Nitrates	Enhances blood flow & increases oxygen delivery	Potentially boosts endurance in physical activities Contributes to lowering blood pressure
Betalains	Contains anti-inflammatory properties.	Promotes overall health, as chronic inflammation is linked to obesity, heart disease, and more.

SPORTS NUTRITION + FOOD & BEVERAGE

Industry Trends

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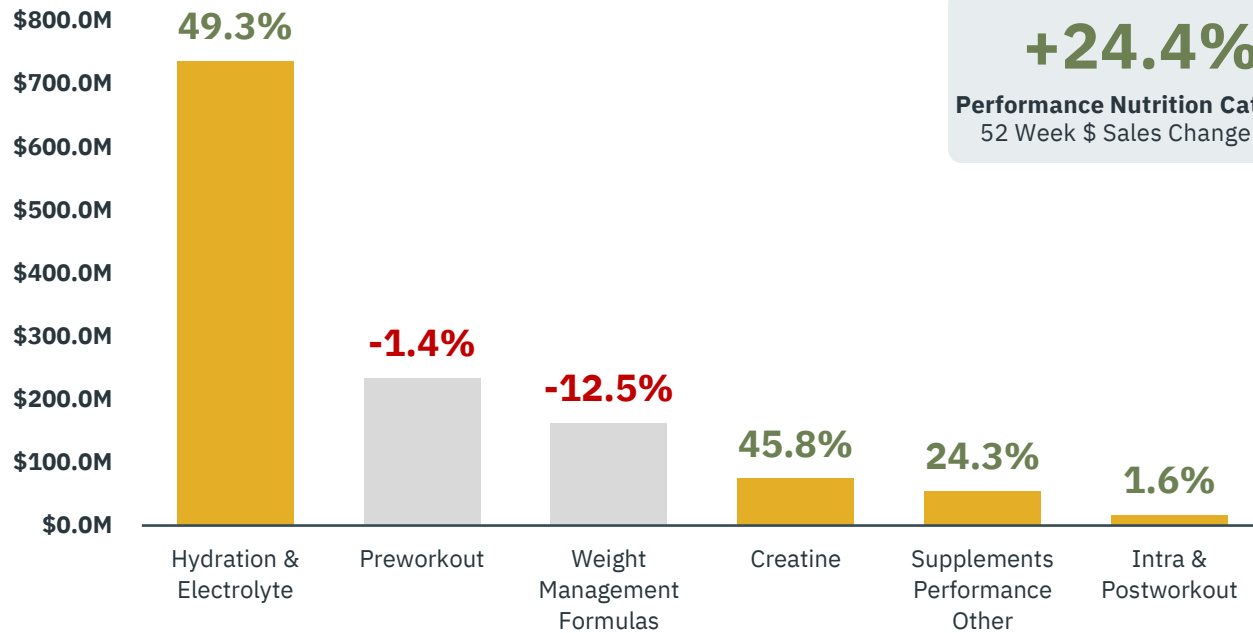




Products that enhance physical performance and recovery through **proper hydration, targeted supplements, and essential micronutrients** continue to grow in Performance Nutrition.

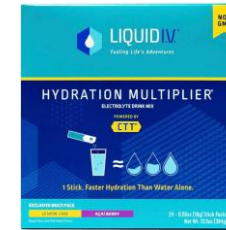
Performance Nutrition By Subcategory

Dollar Sales, Dol % Chg



+24.4%
Performance Nutrition Category
52 Week \$ Sales Change YoY

Performance Nutrition Subcategories



Hydration & Electrolyte



Creatine



Supplements Performance Other

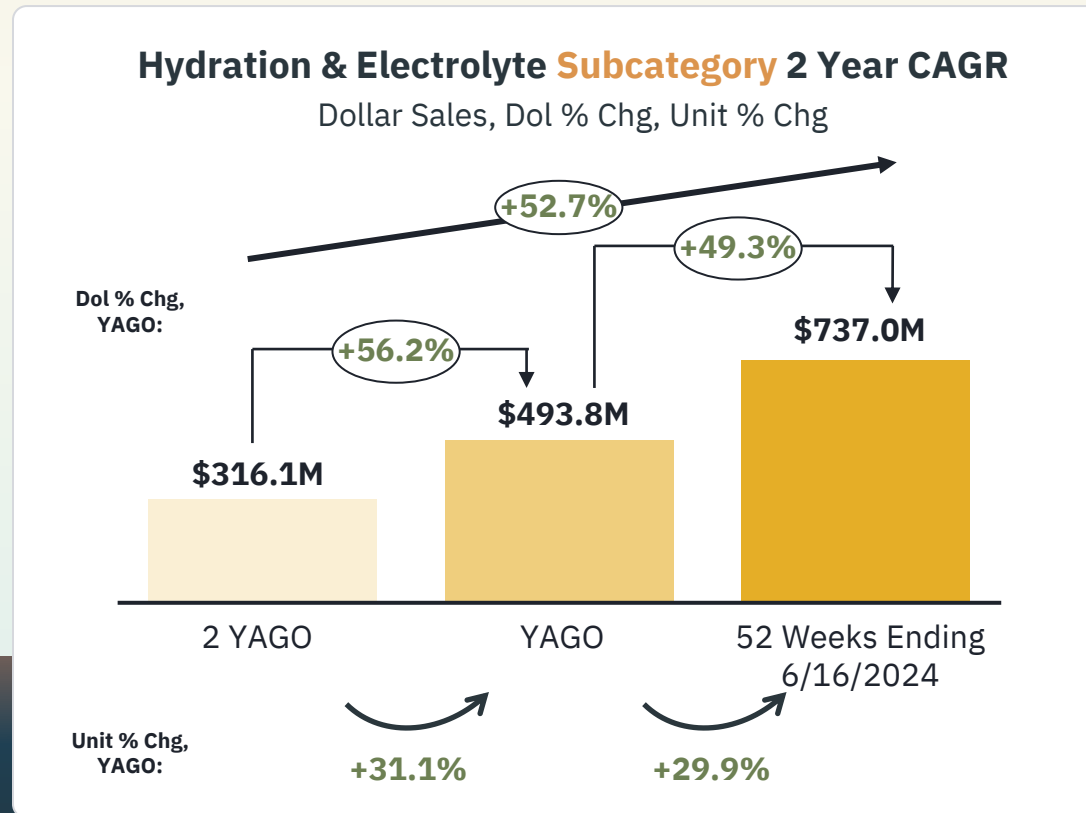


Intra & Postworkout

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



Hydration and electrolytes are now essential for everyone, with new formulas designed to meet the needs of a diverse range of individuals.

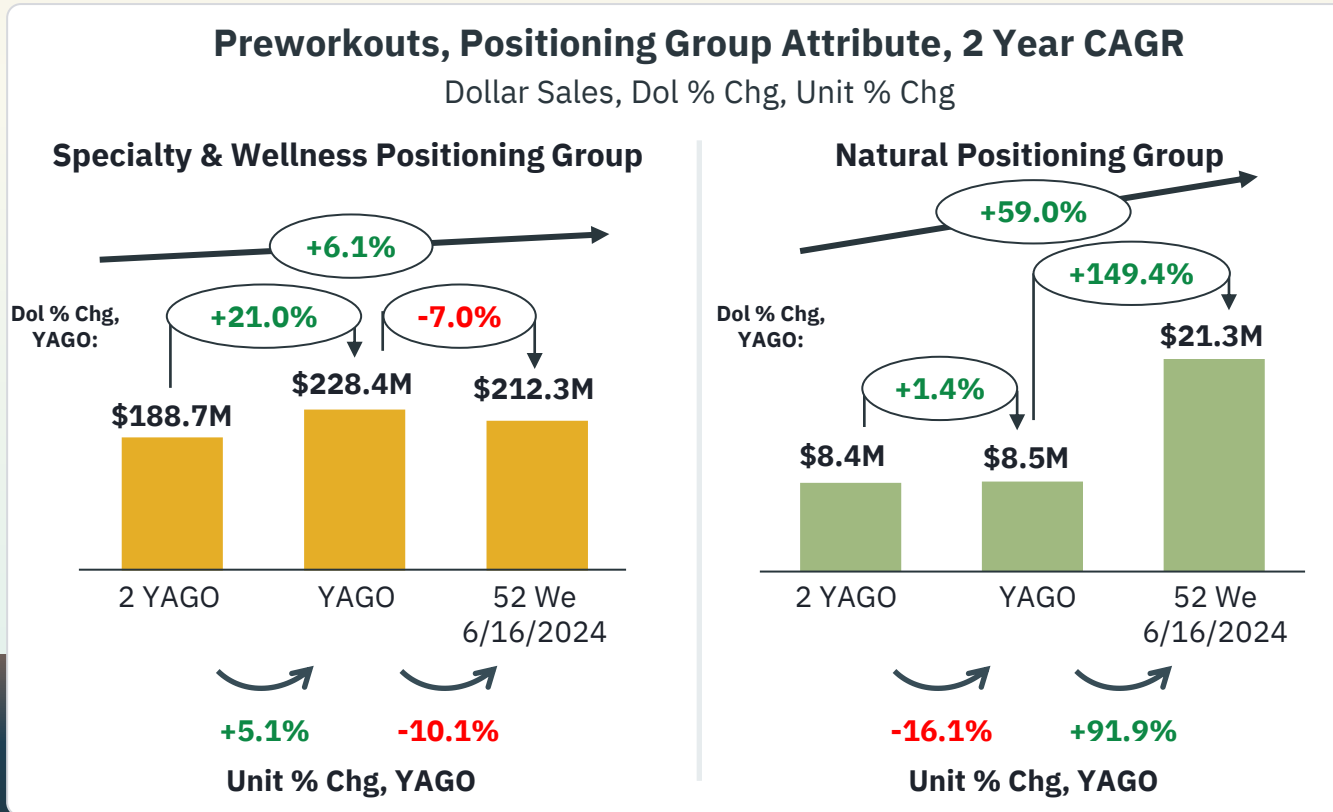


Hydration: Top Functional Ingredients

Functional Ingredient	Dollar Sales	Dollar Sales % Chg	Unit Sales % Chg	Example Product
Multi-Minerals	\$583.3M	+49.4%	+30.9%	
BCAA's	\$19.6M	+12.4%	+23.4%	
Magnesium	\$3.2M	+344.5%	+806.8%	
Taurine	\$1.5M	+835.5%	+728.9%	




Shoppers are seeking alternatives to stimulants, **shifting towards natural, multifunctional preworkout blends** that enhance performance in focus, muscle recovery, and endurance.



Preworkouts Stimulant vs Non-Stimulant


Stimulant

- 200mg+ Caffeine
- Great for **mental and physical performance**
- Those trying to increase **muscle strength and weight loss**
- **Side effects:** jitters, anxiety and swings in energy or mood.



Non-Stimulant

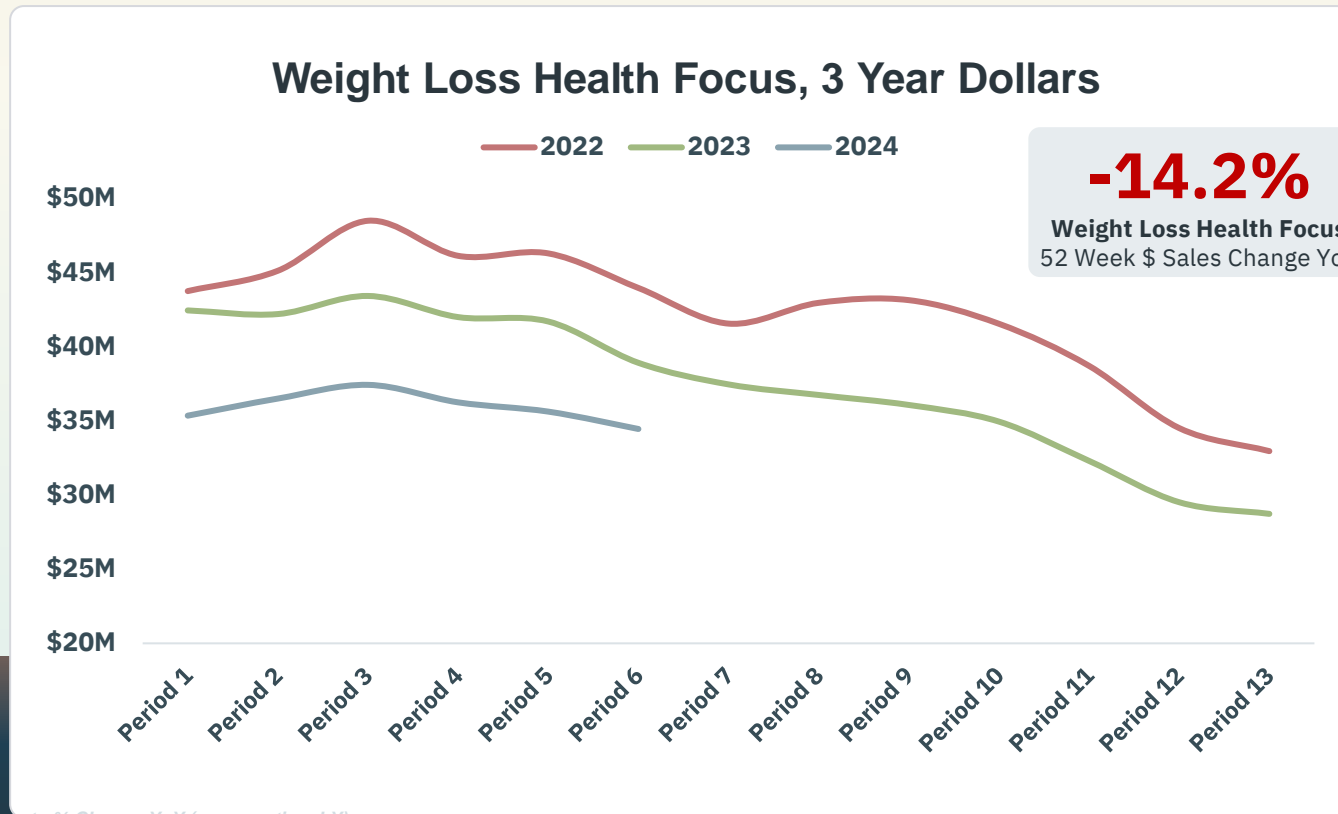
- Beetroot, Citrulline, Vitamin B12
- Great for those who prefer to **exercise at night**
- Those trying to **avoid or cut back** on caffeine or are sensitive
- Great for **stamina, endurance, & increase in blood flow.**



Health Focus: Weight Loss



The rising regulatory scrutiny and growing interest in **GLP-1 medications** have led to a decline in the popularity of traditional weight loss supplements.



GLP-1s & Expanding Regulations in Weight Loss Supplements

Younger Adults Are More Likely Than Those 65 and Older to Report Taking GLP-1 Drugs Just for Weight Loss

Are you currently using or have you ever used a GLP-1 agonist to lose weight or treat a chronic condition such as diabetes or heart disease?

■ Yes, used to treat a chronic condition
 ■ Yes, used both to lose weight and treat a chronic condition
 ■ Yes, used to lose weight

Total **5%** **3%** **5%**

Age

18-29 **7%**

30-49 **3%** **6%**

50-64 **9%** **5%** **5%**

65+ **6%**

1

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

October 27, 2023

Nutritional
OUTLOOK

The rule of 3: Amazon prioritizes 3 categories and 3 labs with new dietary supplement policy

NutraIngredients
USA


* % Represents % Change YOY (vs same time LY)

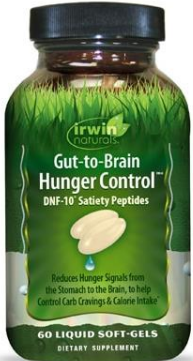



FUNCTIONAL INGREDIENTS IN WEIGHT LOSS


For those seeking holistic weight loss solutions, products that combine functionality with weight loss benefits are seeing increased interest.

EXAMPLE PRODUCTS

Cider Vinegar Supplements	
Dol % Chg	Unit % Chg
+10.4%	+7.8%
Her Own Debloat Gummies	
	

MCT (Med Chain Triglycerides)	
Dol % Chg	Unit % Chg
+42.7%	+43.1%
Irwin Naturals Gut-To-Brain Hunger Control	
	

Collagen Products	
Dol % Chg	Unit % Chg
+957.3%	+1,990.5%
Vitauthority Multi Collagen Burn	
	

Barberry*	
Dol % Chg	Unit % Chg
+89.8%	+92.6%
Life Seasons Berberine	
	

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

* Not included in current Weight Loss Health Focus, however, growth can be attributed to shoppers looking for Berberine for weight management purposes.

EXPANDING HORIZONS: THE RISE OF PROTEIN-ENRICHED FOODS AND BEVERAGES



With protein now being incorporated into a variety of foods and beverages – including powders, pastry snacks, chips and cereals, there is something for every time of the day.

EXAMPLE PRODUCTS

Protein Supplements & Meal Replacements

Dol % Chg	Unit % Chg
+9.2%	+6.5%

Truveni Plant Based Protein



SS Cookies & Snack Bars

Dol % Chg	Unit % Chg
+8.3%	+3.8%

Legendary Foods Protein Toaster Pastry



SS Chips, Pretzels & Snacks

Dol % Chg	Unit % Chg
+66.7%	+62.6%

Quest Protein Tortilla Chips



SS Cold Cereals

Dol % Chg	Unit % Chg
+24.6%	+21.4%

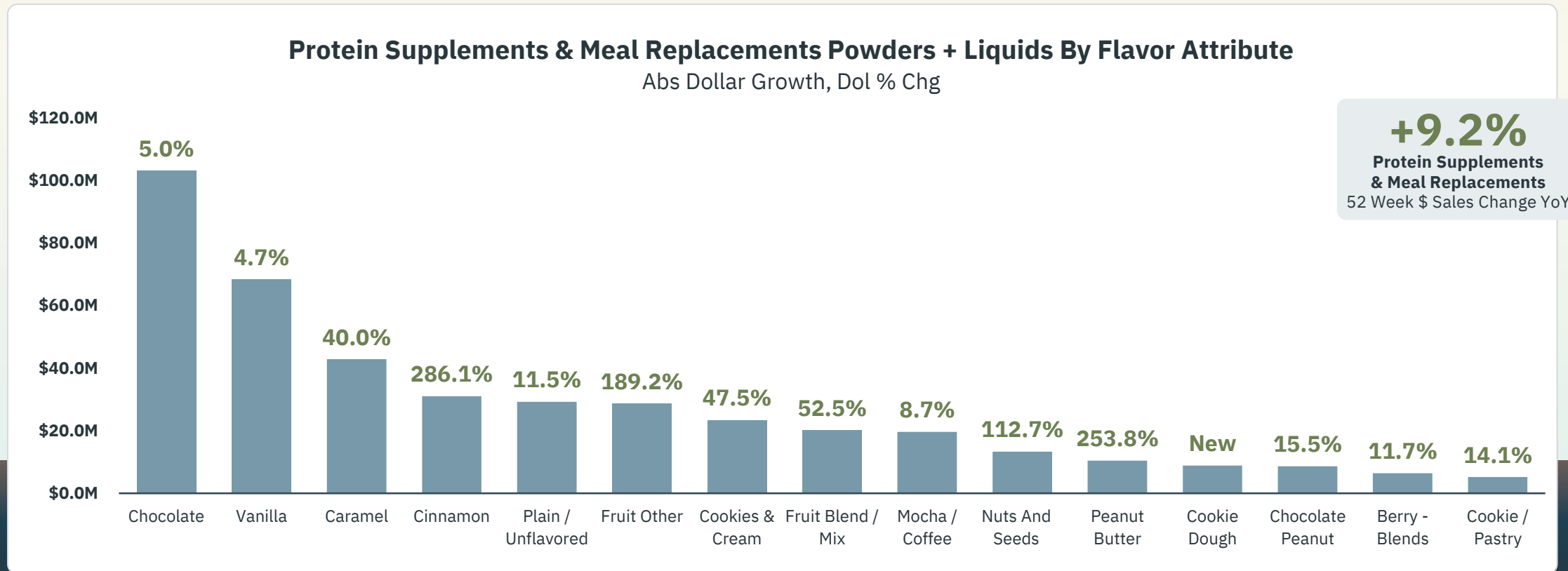
Magic Spoon Protein Cereal



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



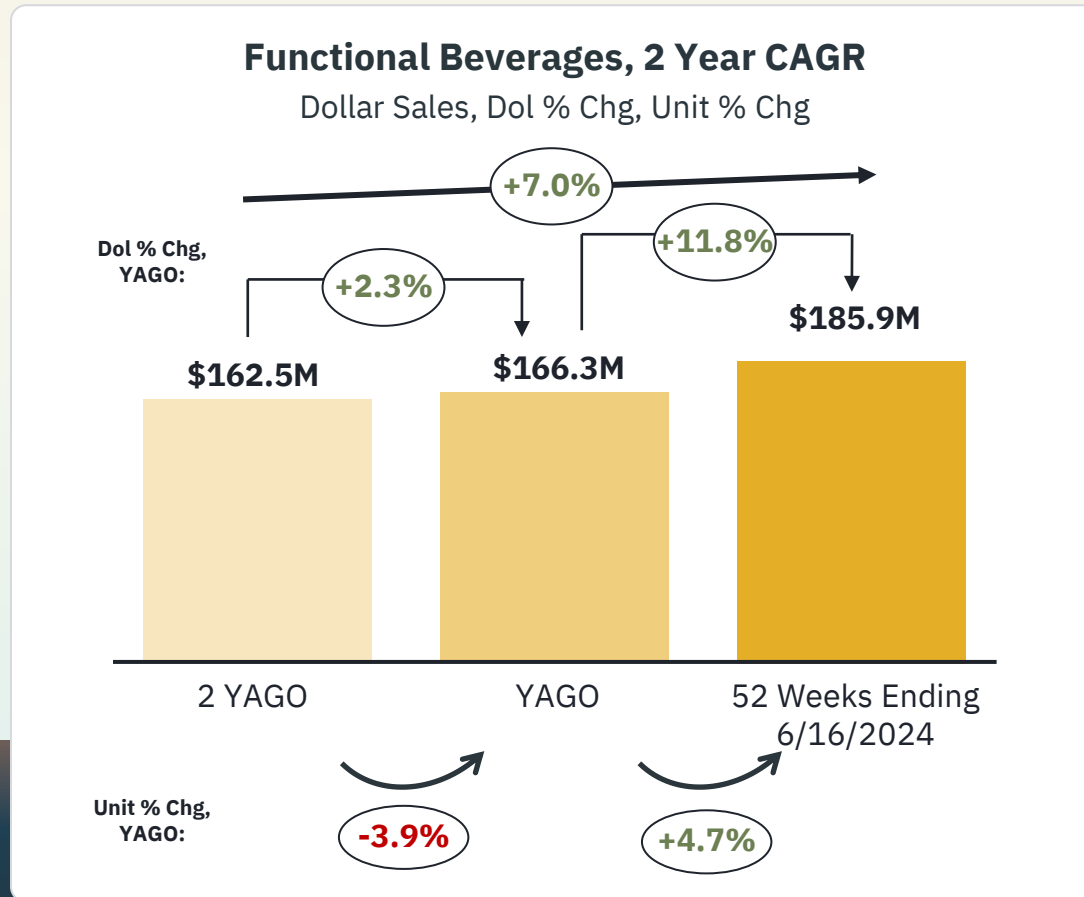
Protein powders and ready-to-drink products are trending, fueled by weight management and post-workout recovery solutions, as well as shoppers' desire for new and exciting flavors.



UTILIZING HEALTH BENEFITS THROUGH FUNCTIONAL DRINKS



Functional beverages are enhanced with ingredients that can provide **benefits ranging from improved digestion, energy, mood/sleep, pain and immune support.**



Subcategory: Functional Beverages

52 Wks Ending 6/16/24 Dol % Chg, Unit % Chg

Functional Ingredient	Benefits	\$ % Chg	Unit % Chg	Example Product
Mushrooms - All	<ul style="list-style-type: none"> Immunity Support Reduce Inflammation Antioxidants 	+80.4%	+77.5%	ODYSSEY
Ashwagandha	<ul style="list-style-type: none"> Reduce Swelling Anxiety Support Promote Sleep 	+228.6%	+73.3%	hiyo
Turmeric	<ul style="list-style-type: none"> Anti-inflammatory Digestion Joint Health 	+6.6%	+14.5%	ZYN
Theanine	<ul style="list-style-type: none"> Reduce Stress Promote Sleep Mental Focus 	+80.2%	+22.5%	Kin EUPHORICS

WHAT'S NEW AND WHAT'S NEXT?

Emerging Trends on Social Media

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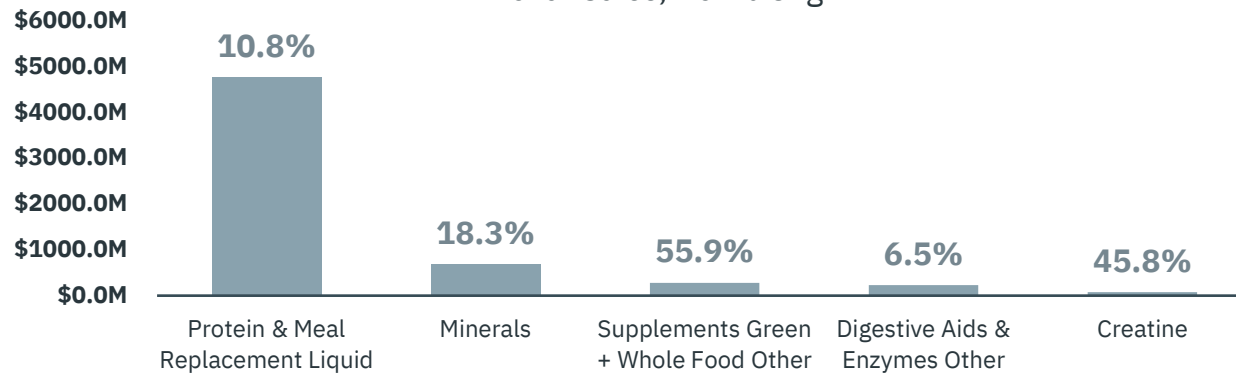


WHAT'S NEW AND TRENDING ON SOCIAL MEDIA?

High-protein diets, hydration, creatine, magnesium, and gut health continue to be leading topics on TikTok.

Sales Growth of Trending TikTok Categories

Dollar Sales, Dol % Chg



EXAMPLE PRODUCTS



Trending Topics in the US:



Postbiotics



CBD + CBG Gummies



Lions Mane Mushroom Supplements



Soursop Bitters



Sea Moss Gummies



Plant-Based Proteins



Thank you!

For more information, contact
retailinsights@spins.com

