

The logo features the number '45' in a large, stylized purple font. The word 'YEARS' is written in a smaller purple font across the middle of the '5'. To the right of the '45' is the word 'Natural' in a dark grey font, with a small circular sunburst icon above it. Below 'Natural' is the word 'Products' in a larger, bold dark grey font. At the bottom of the logo is the text 'EXPO WEST' in a purple font, followed by a registered trademark symbol (®).

45 YEARS Natural Products EXPO WEST®



By Informa Markets

The State of Supplements

Co-located with



Product Discovery Powered by



By Informa Markets

The State of Supplements



Bill Giebler

Content & Insights Director, Nutrition Business Journal
New Hope Network



Erika Craft

Market Research Analyst, Nutrition Business Journal
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By Informa Markets

NBJ Summit 2026

July 27-30th, 2026

NBJ Summit is the premier event for nutrition executives, innovators and visionaries to exchange ideas and shape the future of health and wellness.



By Informa Markets

NBJ's State of Supplements

March 2026

Bill Giebler

Content & Insights Director

Nutrition Business Journal

bgiebler@newhope.com

Erika Craft

Market Research Analyst

Nutrition Business Journal

ecraft@newhope.com



By Informa Markets

Macro Health Trends



Supplement Market Update



Evolving Sales Channels & Product
Discovery



Conditions Driving Consumer
Wellness

Macro Health Trends

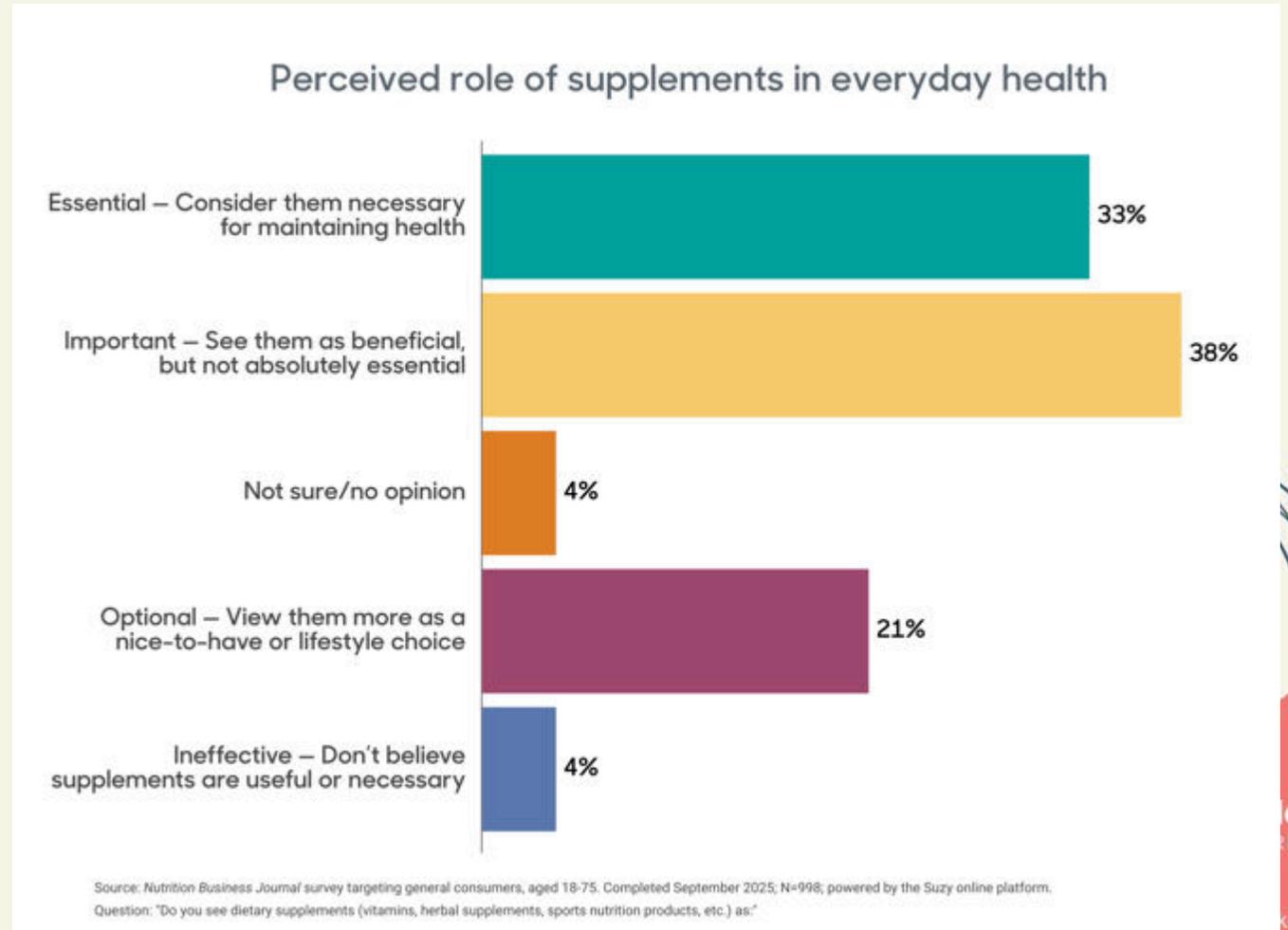
Supplement Market Update

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Conditions Driving Consumer
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Supplements have become embedded in consumers' core health regimens, with only 1 in 5 viewing them as a luxury

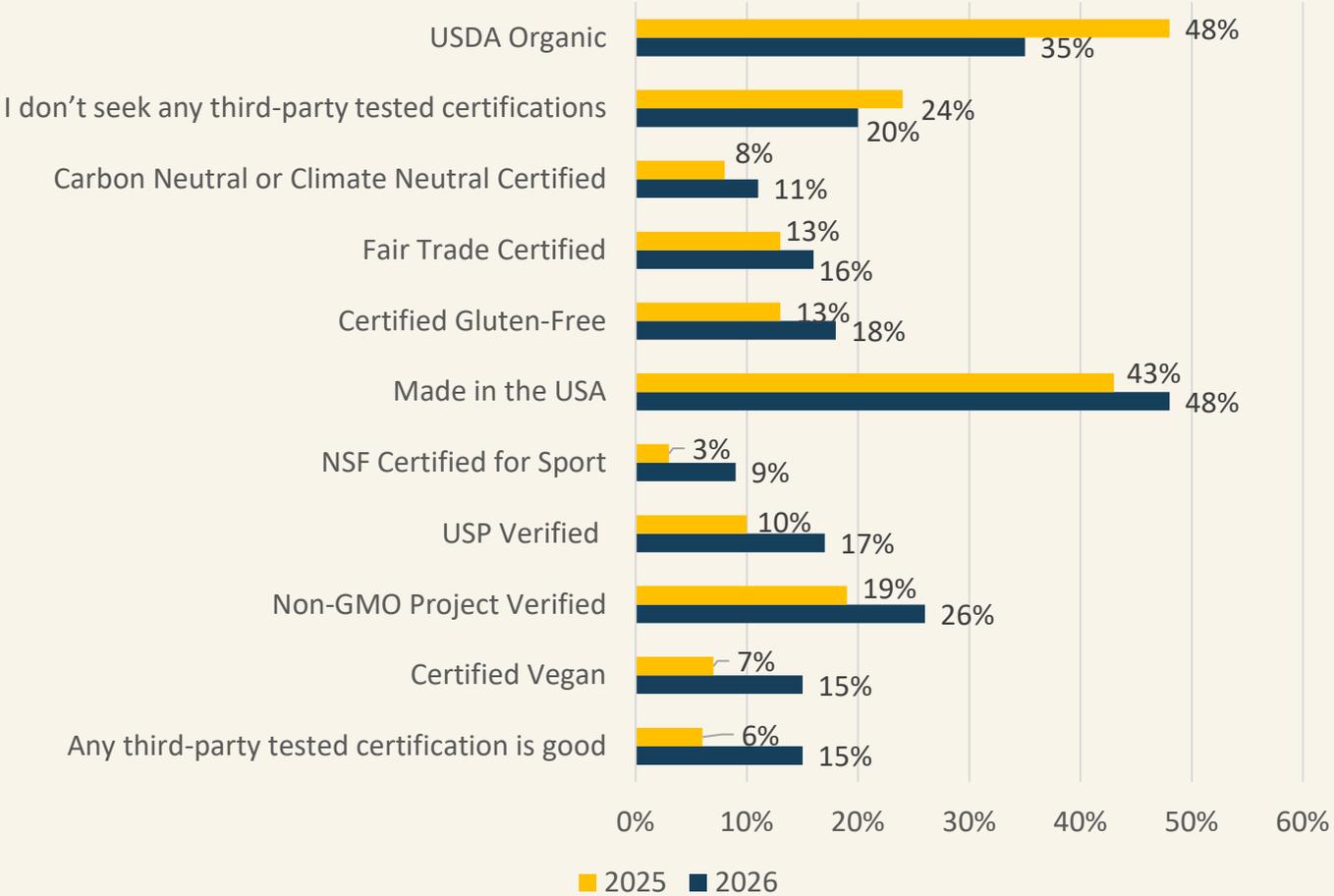
- With 71% of general consumers (not just supplement consumers who are already bought in to the benefits...) view supplements as essential or important to everyday health



Certification priorities highlight a more informed and credibility-seeking supplement consumer

- Interest in most certifications has increased in importance over the last 2 years while disinterest has decreased
- USDA organic was the top certification in 2025, surpassed by Made in the USA in 2026

Certifications important to supplement consumers

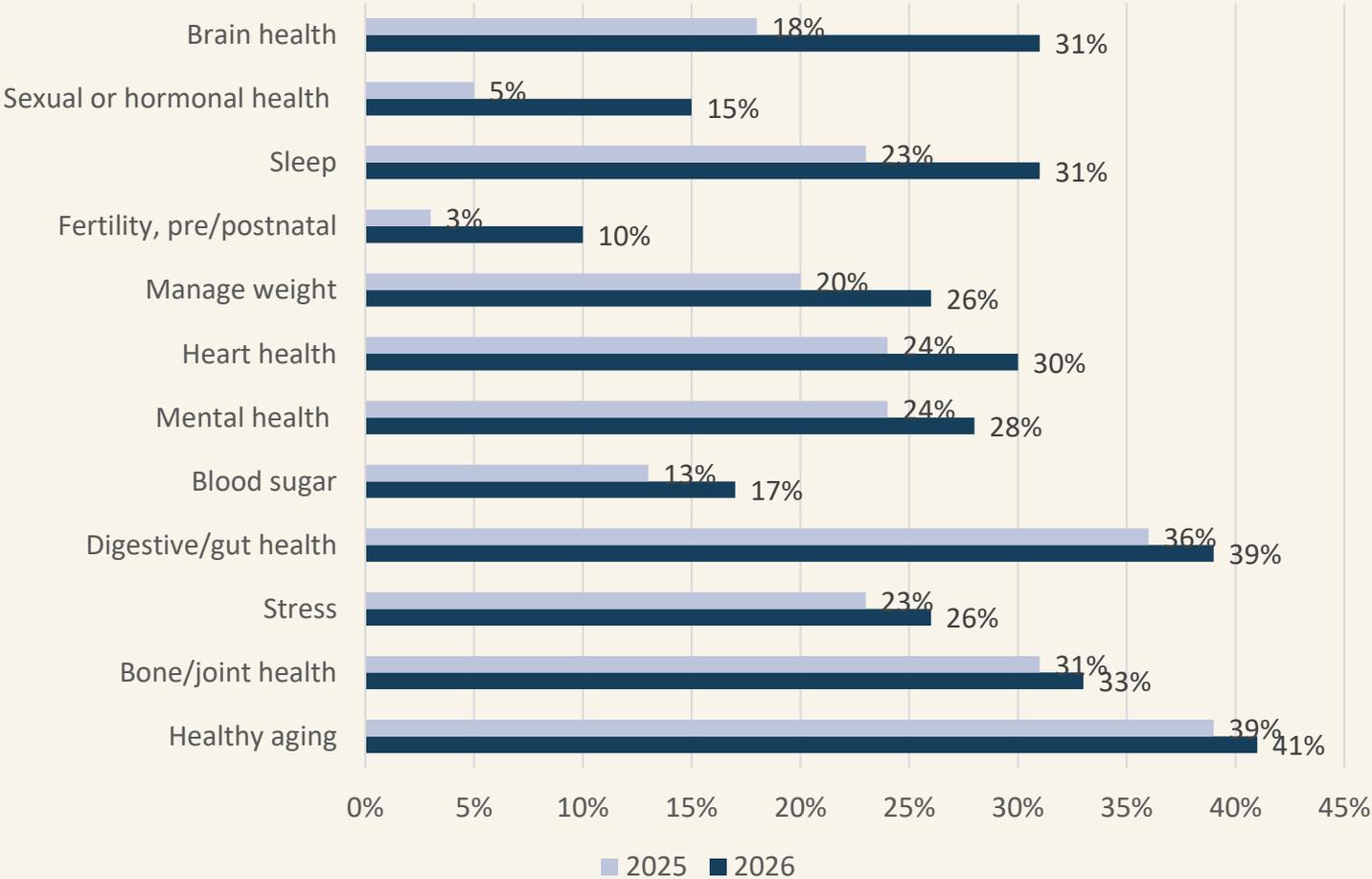


Source: *Nutrition Business Journal* surveys targeting consumers that purchase supplements, aged 20-75. Completed Feb 2024 with N=1,074; Feb 2025 with N=895; and Jan 2026 with N=1,000; powered by the Suzy online platform.
Question: "Which product certifications are you actively seeking in your supplement products? Please select all that apply."
Note: Where there is a "0", that was not a response option in 2024.

Consumer interest is shifting toward foundational and longevity-oriented health needs

- Conditions ranked by **most % increase** from 2025, with **Brain Health** increasing the most (+13%) followed by **Sexual/Hormonal Health** (+10%) and **Sleep** (8%)
- **Gen Z** over-indexes on **sleep**, **Millennials** on **stress mgmt. & brain health**, and both **Gen Z & Millennials** place *significantly* high importance on **sexual/hormonal health**

Conditions important to supplement consumers

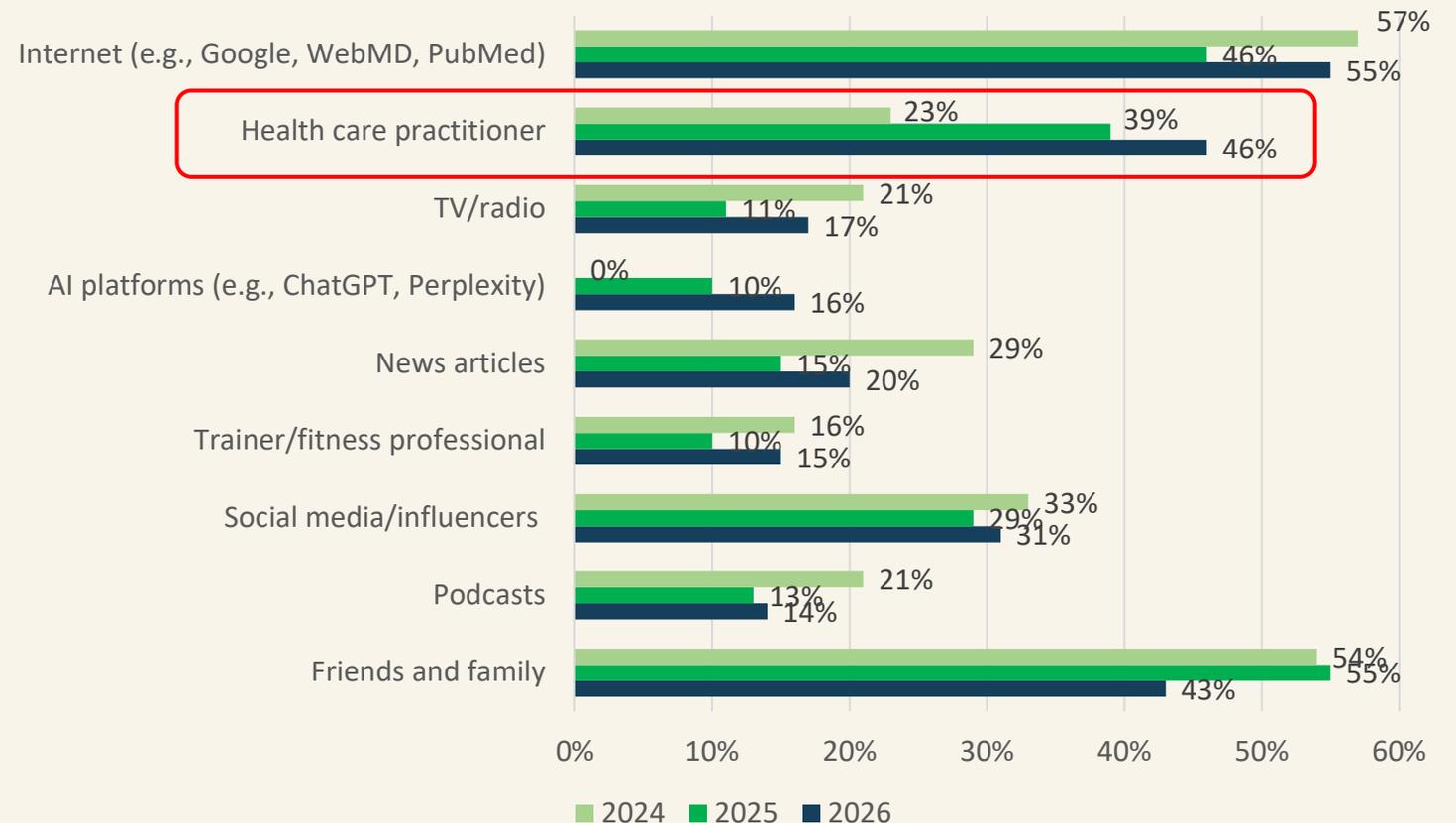


Source: *Nutrition Business Journal* surveys targeting consumers that purchase supplements, aged 20-75. Completed Feb 2025 with N=895; and Jan 2026 with N=1,000; powered by the Suzy online platform.
 Question: "Which of the following best describes why you take dietary supplements?"
 Note: Only showing the conditions that increased in importance from 2025 to 2026

Consumers have steadily increased reliance on digital research, practitioners, and emerging AI tools for supplement information

- 46% of consumers get supplement information from their healthcare practitioner in 2026, increasing significantly from 2024
- The increasing importance of practitioner guidance suggests the supplement market will continue shifting toward science-backed, protocol-based, and practitioner-endorsed products as consumers seek higher trust and personalization

Information sources important to supplement consumers

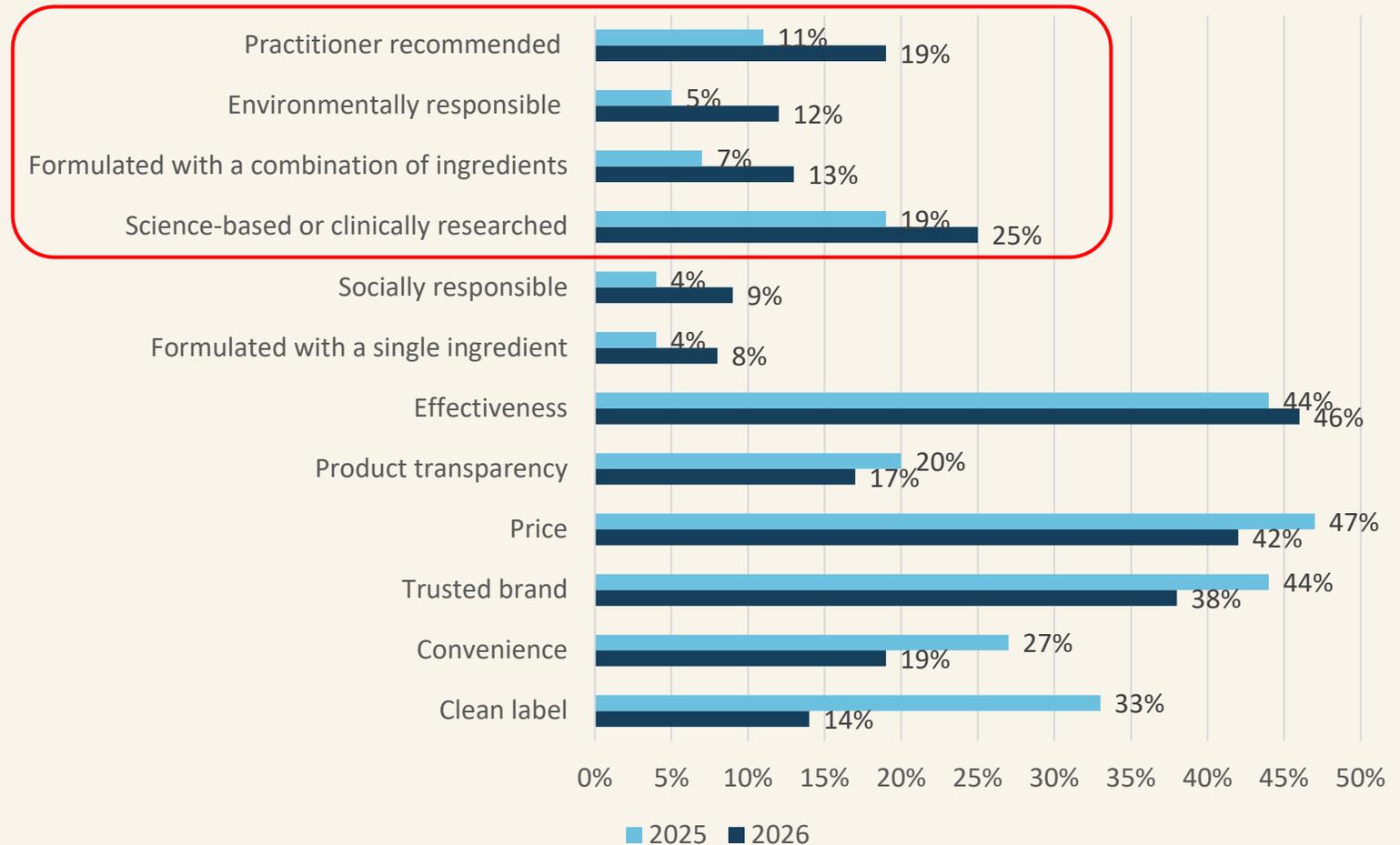


Source: *Nutrition Business Journal* surveys targeting consumers that purchase supplements, aged 20-75. Completed Feb 2024 with N=1,067; Feb 2025 with N=895; and Jan 2026 with N=1,000; powered by the Suzy online platform.
Question: "Where do you get information on the dietary supplement products you're consuming? Please select all that apply."

Fastest-growing attributes: practitioner recommendations, environmentally responsible, science-backed claims, and combo formulations

- Growth in validation and formulation-related attributes suggests consumers are evaluating supplements more rigorously, moving beyond basic claims toward evidence, expertise, and product sophistication
- Increase in environmentally responsible suggests consumers want more information on sourcing practices

Attributes important to supplement consumers



Source: *Nutrition Business Journal* surveys targeting consumers that purchase supplements, aged 20-75. Completed Feb 2025 with N=895; and Jan 2026 with N=1,000; powered by the Suzy online platform.

Question: "What attributes are primarily important to you when purchasing dietary supplements? Please select your top three options."

Personalization, wearable, and health tech funding

BIOTECH & HEALTH

Function Health raises \$298M Series B at \$2.5B valuation

Kate Park · 12:30 PM PST · November 19, 2025

February 13, 2026 - News

Clair Unveils Continuous Hormone Wearable

Full picture.



businesswire
A BERKSHIRE HATHAWAY COMPANY

Newsroom Services & Solutions Resources For Journalists

Aug 19, 2025 7:00 AM Eastern Daylight Time

Eight Sleep Secures \$100 Million to Accelerate AI-Powered Sleep Optimization, Expand Into Medical, and Grow Global Footprint

businesswire
A BERKSHIRE HATHAWAY COMPANY

Newsroom Services & Solutions Resources For Journalists

Amazon One Medical Introduces Health Insights to Help Patients Better Understand Their Lab Results

Share

New beta feature transforms routine bloodwork results into personalized and actionable health information

Fullscript®

Solutions Pricing Integrations

NEWS

Fullscript and ŌURA Partner to Integrate Wearable Data Into Clinical Workflows, Fueling a New Level of Personalized Assessment in Whole Person Care

Published on January 12, 2026

Oura Doubles Down on Women's Health

Oura has partnered with femtech company Mira to integrate lab-grade hormone testing data, positioning the wearable ring maker to capture a share of the rapidly growing \$60B femtech market.

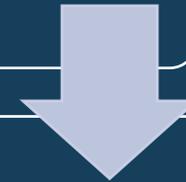
Macro Health Trends



Supplement Market Update



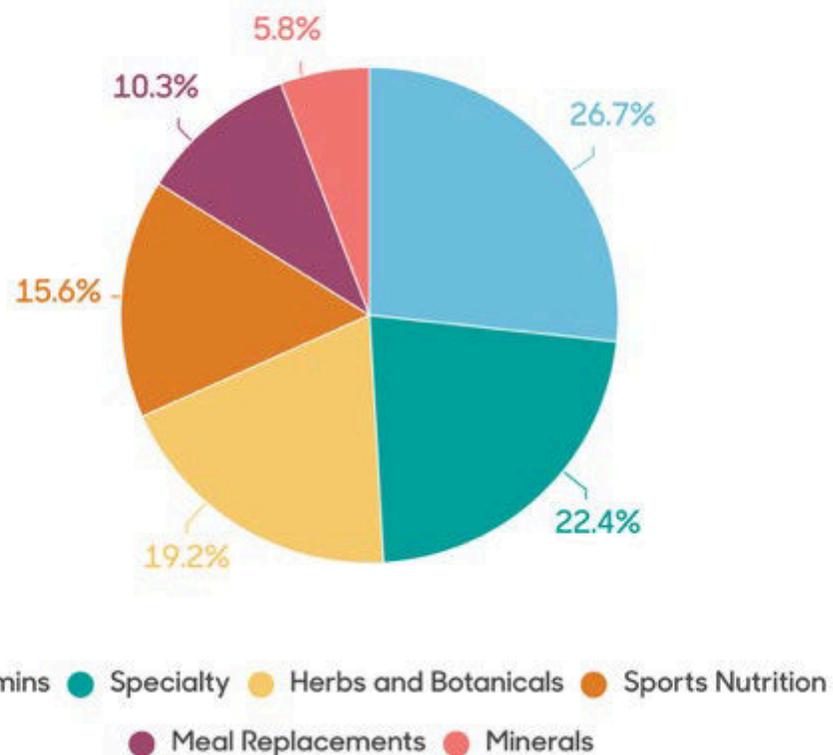
Evolving Sales Channels & Product
Discovery



Conditions Driving Consumer
Wellness

- 5.5% industry growth shows up in these categories; specialty and herbs lead in both share & growth

\$72.88 billion supplement industry market share by product category, 2025p



Source: Nutrition Business Journal

2025p Growth

Sports Nutrition

+ 7.8% growth

Herbs & Botanicals

+ 6.0% growth

Specialty

+ 5.5% growth

Meal Supps

+ 5.5% growth

Minerals

+ 4.8% growth

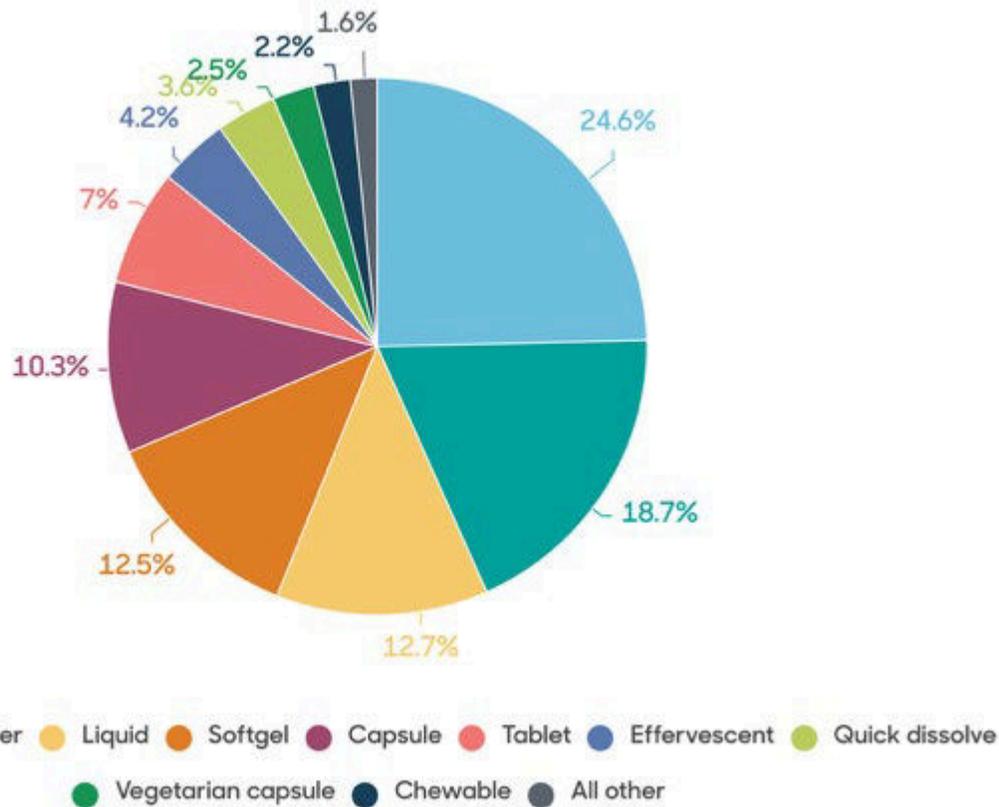
Vitamins

+ 2.8% growth

5.5%
industry
avg growth

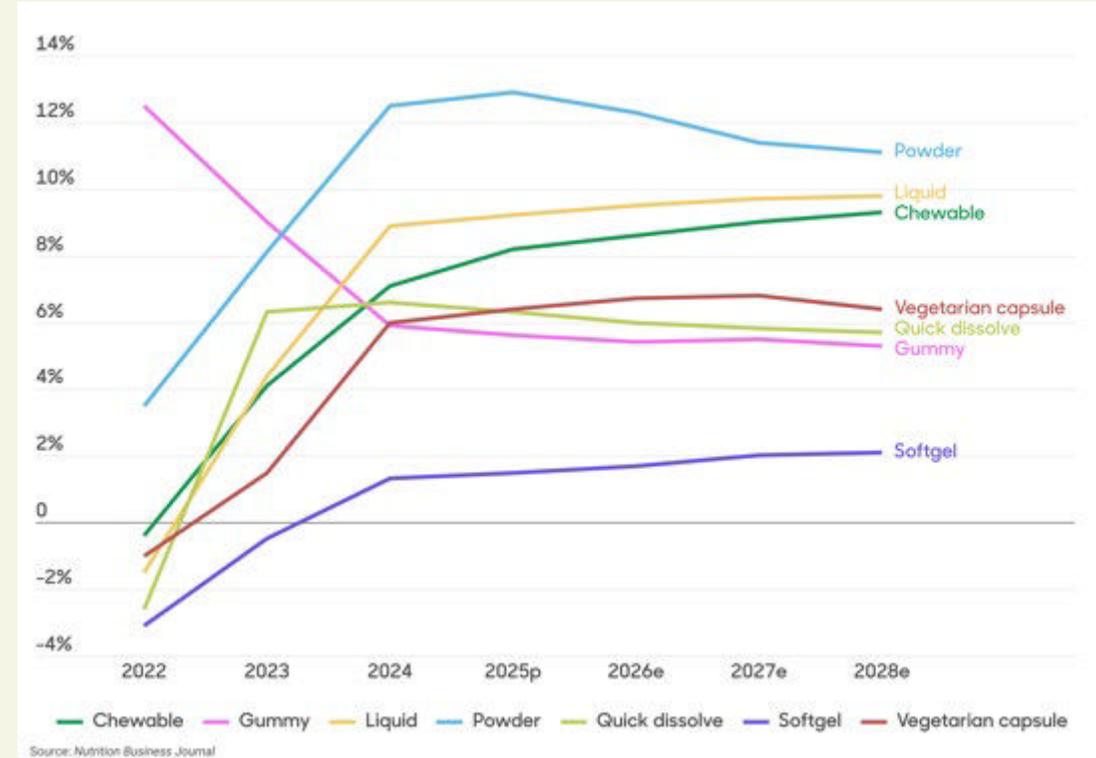
Top formats driving growth: Powders, Liquid, Chewables

Supplement industry growth by delivery format, 2025p



Source: Nutrition Business Journal

Supplement industry growth by delivery format



Source: Nutrition Business Journal

**Ingredients
of note in 2025:**

Whey Protein
9.7% growth
32.0% mkt share

Collagen Sports Powder
9.2% growth
21.2% mkt share

Creatine
12.7% growth
5.9% mkt share

Market manifestations: Sports Nutrition



Clean Simple Eats Clear Protein Powder

Clear protein, formulated to be lighter than traditional whey and better for digestion; 20g grass-fed clear whey protein isolate, naturally flavored & sweetened



Momentous Creatine Chews

Creatine chews for a unique, fun format but backed with better bioavailability of creatine than in a gummy



Easy Collagen Protein Shots

Collagen peptides with amino acids added for a complete protein profile, all in a liquid packet shot

Ingredients of note in 2025:

Probiotics
6.5% growth
13.3% mkt share

Fiber
8.3% growth
11.1% mkt share

Synbiotics
7.4% growth
6.8% mkt share

Collagen
23.0% growth
7.1% mkt share

Market manifestations: Specialty



Promix Debloat Pre+Probiotic

Prebiotic & Probiotic powder stick pack designed to help with debloating, building gut barrier, aids detox and builds immunity



NEEDED Collagen Protein Powder

Grass-fed collagen protein designed for fertility, pregnancy, postpartum women



Vital Nutrients GLP-1 Daily Fiber

Fiber and postbiotic support for those on GLP1s; practitioner brand, potentially making it easier to reach patients on GLP1s

**Ingredients
of note in 2025:**

Gotu Kola
7.8% growth

Ashwagandha
14.9% growth

Mushrooms
16.4% growth

Berberine
40.6% growth

Market manifestations: Herbs and Botanicals



Gaia Herbs Mental Alertness

Synergistic herbal blend with ginkgo, gotu kola, rosemary leaf and peppermint to enhance focus, circulation, memory, and antioxidant protection



Banyan Botanicals Adrenal Nourish Tablets

Replenish the adrenal glands, support balanced energy levels, and promote overall resilience in the midst of stress



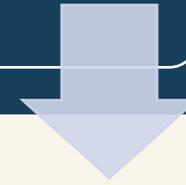
Cymbiotika Liposomal Longevity Mushrooms

Green tea, king trumpet mushroom, lion's mane, reishi, shiitake, turkey tail; enhance athletic performance, Improves exercise recovery time, Supports a healthy immune system and central nervous systems

Macro Health Trends



Supplement Market Update



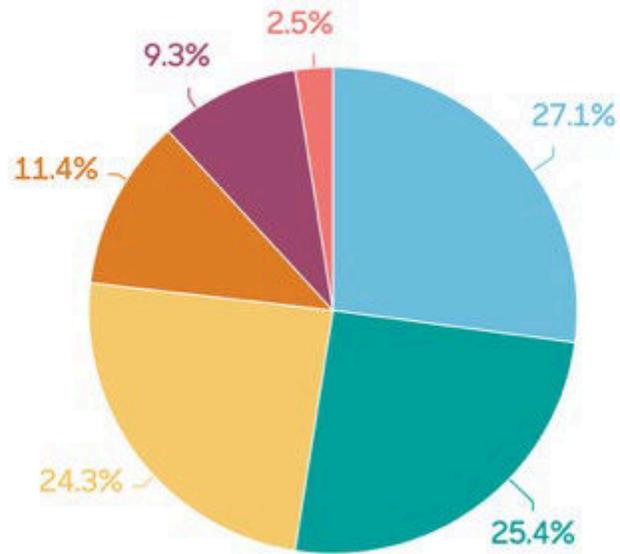
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Conditions Driving Consumer
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Mass Market grabs top market share spot in 2024, while Ecomm strides to top in 2028

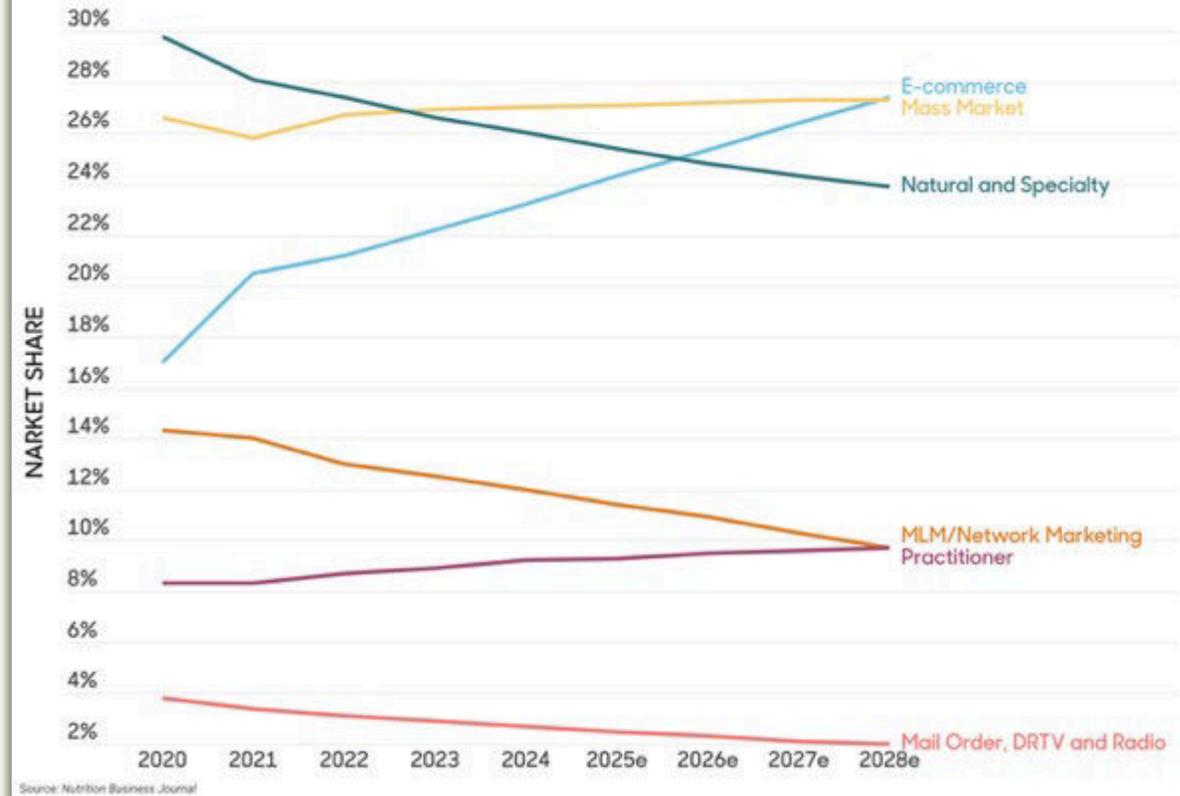
Supplement industry market share by channel, 2025p



- Mass Market
- Natural and Specialty
- E-commerce
- MLM/Network Marketing
- Practitioner
- Mail Order, DRTV and Radio

Source: Nutrition Business Journal

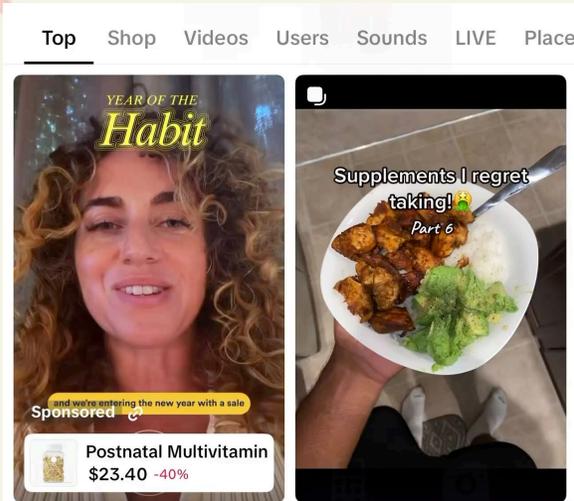
Supplement industry market share by channel



Source: Nutrition Business Journal

TikTok emerging as key growth engine for supplement and wellness brands

Initial estimates suggest this new, emerging subset of e-commerce, is est. to be around **\$1 billion in 2025, with more growth expected in 2026**



I'm Kat, founder of Ritual, and we're giving you 40% off our...
 ...#supplements #beetrootpowder #turmeric...
 Ritual 487 likes
 Brian Kuhl Apr 2, 2023 387.8K likes

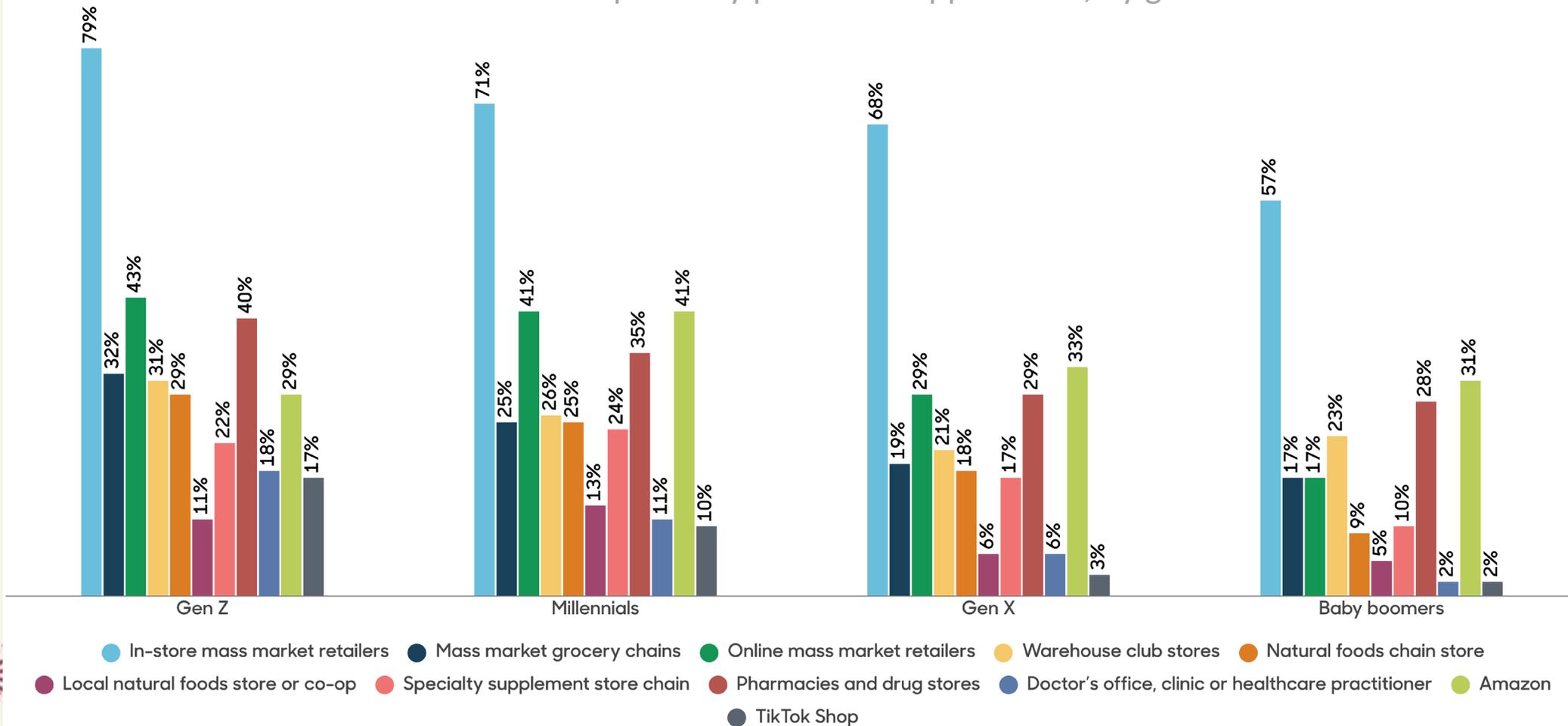


Supplements edition!
 from a dermatologist
 30 | supplements!
 #SkinSupplements #Vitami...
 Gym supplement tier list (trending tiktok edition) 1...



Younger consumers over-index on pharmacies/drug stores, TikTok shop, specialty, club stores, natural food stores and practitioner office

Where consumers primarily purchase supplements, by generation



Source: Nutrition Business Journal surveys targeting consumers that purchase supplements, aged 19-75. Completed January 2026 with N=1,000; and Jan 2026 with N=1,000; powered by the Suzy online platform.
 Question: "Where do you primarily purchase your dietary supplement products? Please select your top option."

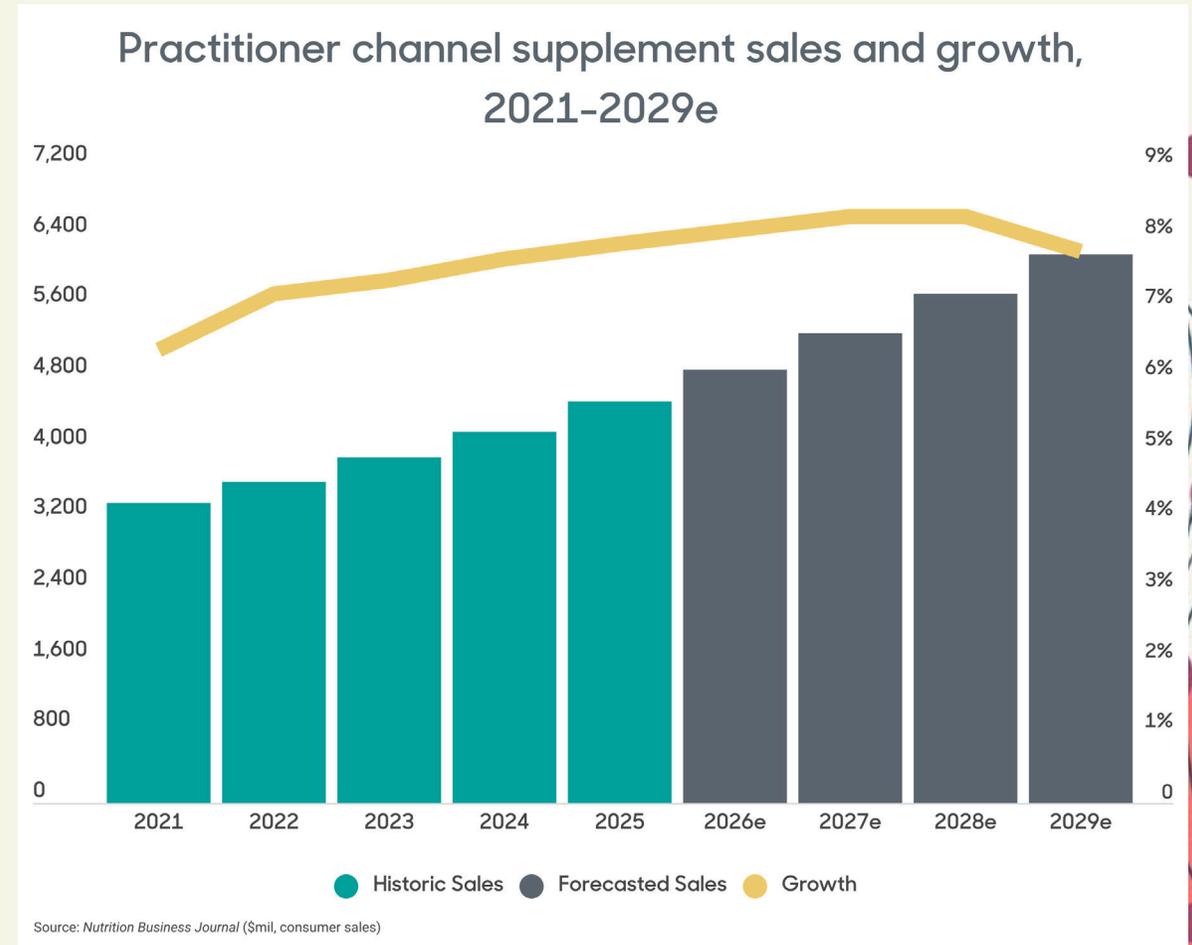
The practitioner channel evolves from clinical niche to mainstream access point

- Rising consumer demand for trusted, science-backed products
- Increased engagement with healthcare providers around metabolic health, longevity, and GLP-1 use
- Expansion of digital dispensing platforms (e.g., virtual practitioner fulfillment)
- Growing preference for personalized and protocol-based supplement use

Historically:
Primarily in-office

Mid-phase:
Expansion through ecomm & telehealth platforms

Current:
Blurred lines between practitioner, DTC and online fulfillment platforms



Macro Health Trends

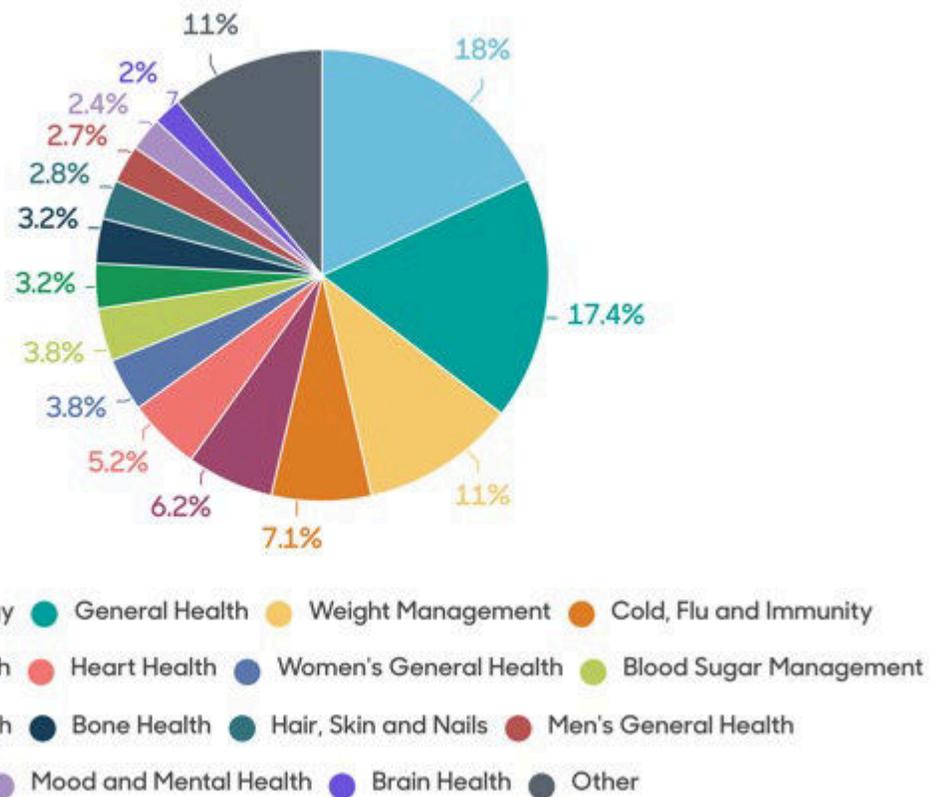
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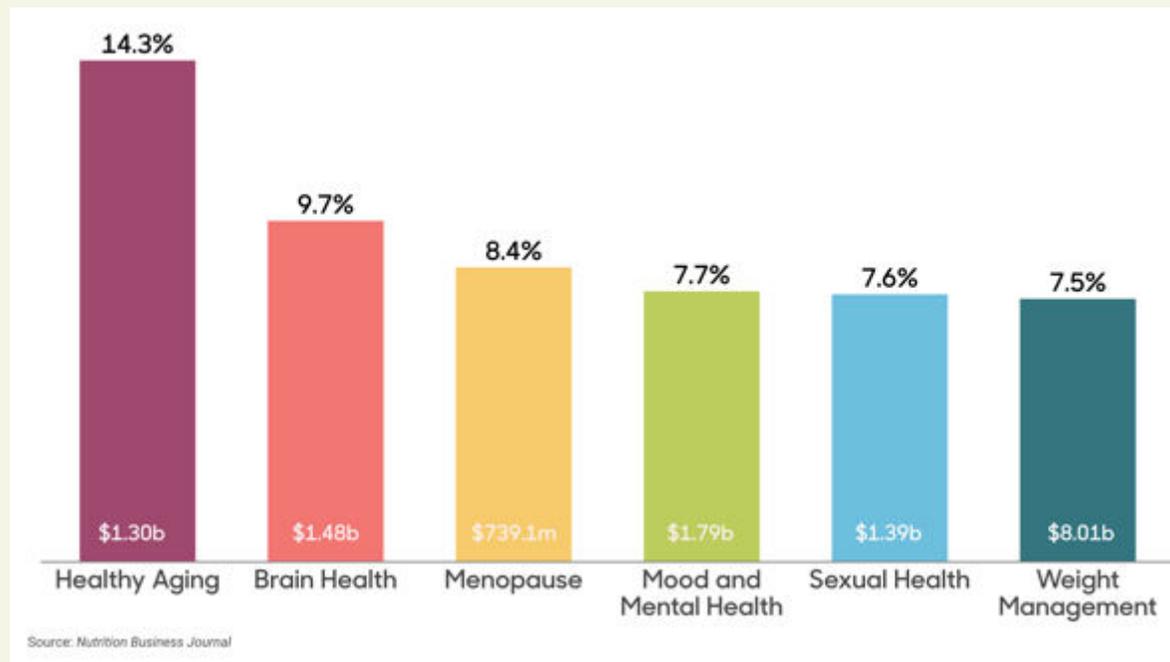
Health conditions driving demand & shaping the industry

Supplement industry market share by condition, 2025p



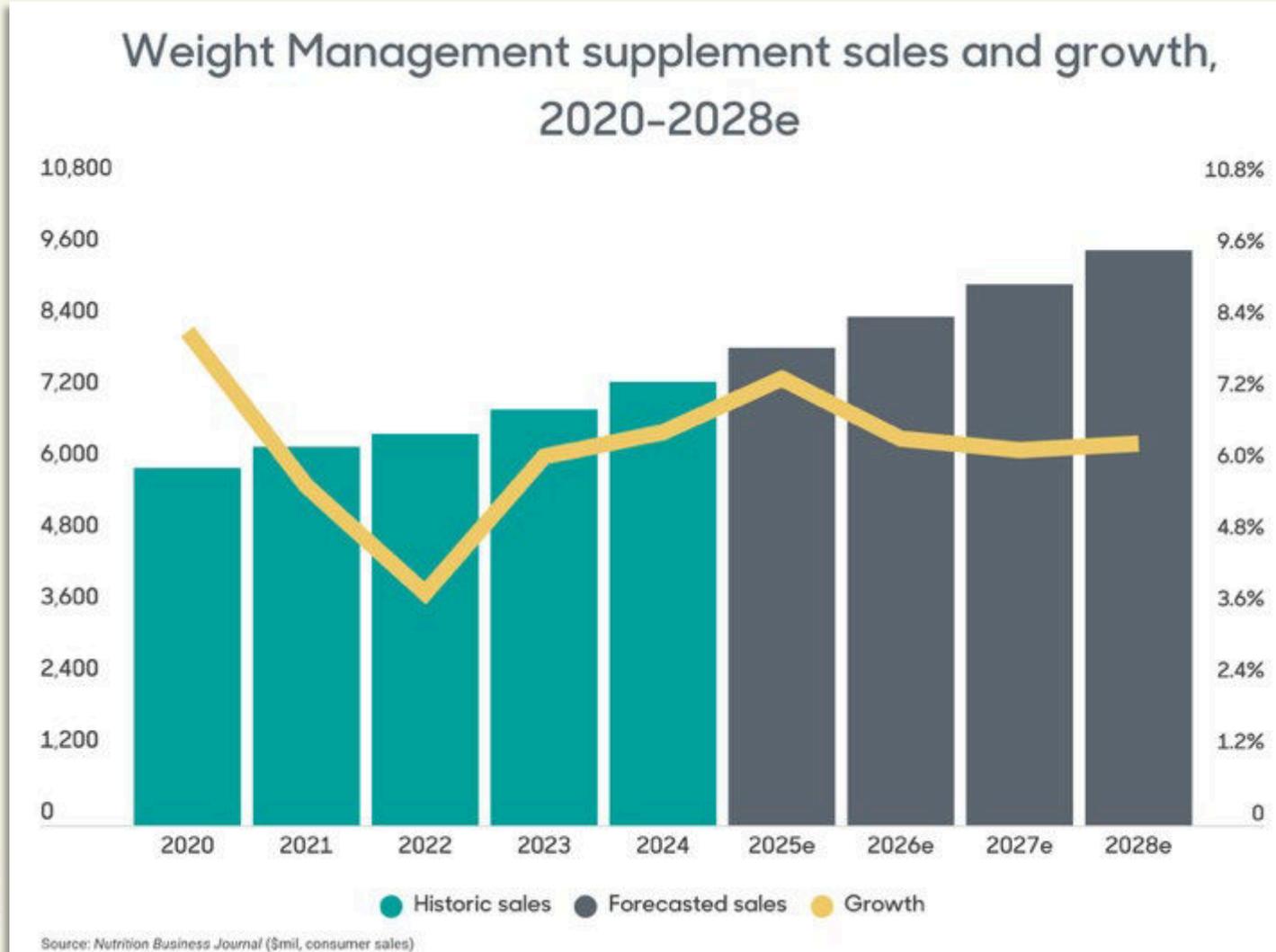
Source: Nutrition Business Journal

Fastest growing conditions in 2025



Source: Nutrition Business Journal

GLP-1 adoption is increasing demand for nutritional support within weight management



+ \$1.65b

increase between
2025 and 2028

+ 7.5% 2025 growth

+ 6.4% CAGR from
2025-2028

Ingredients
of note in 2025:

Meal Replacements

5.8% growth
67.6% mkt share

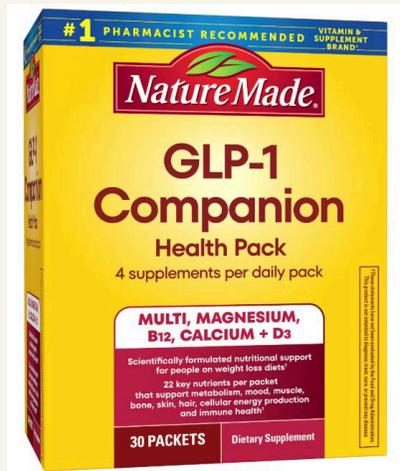
Sports Nutrition

8.3% growth
15.4% mkt share

Combo Herbs

26.9% growth
6.4% mkt share

Market manifestations: Weight Management



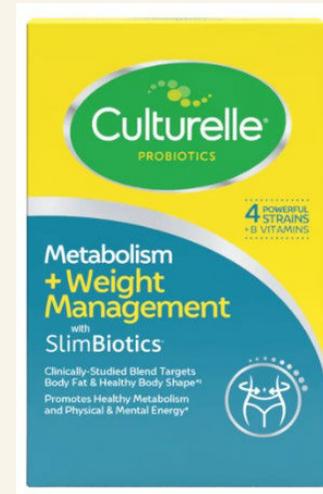
NatureMade GLP-1 Companion Multi

Scientifically formulated nutritional support for those on weight loss diets; with multivitamins, magnesium, B12, calcium and D3.



Lemme BURN Body Composition Gummies

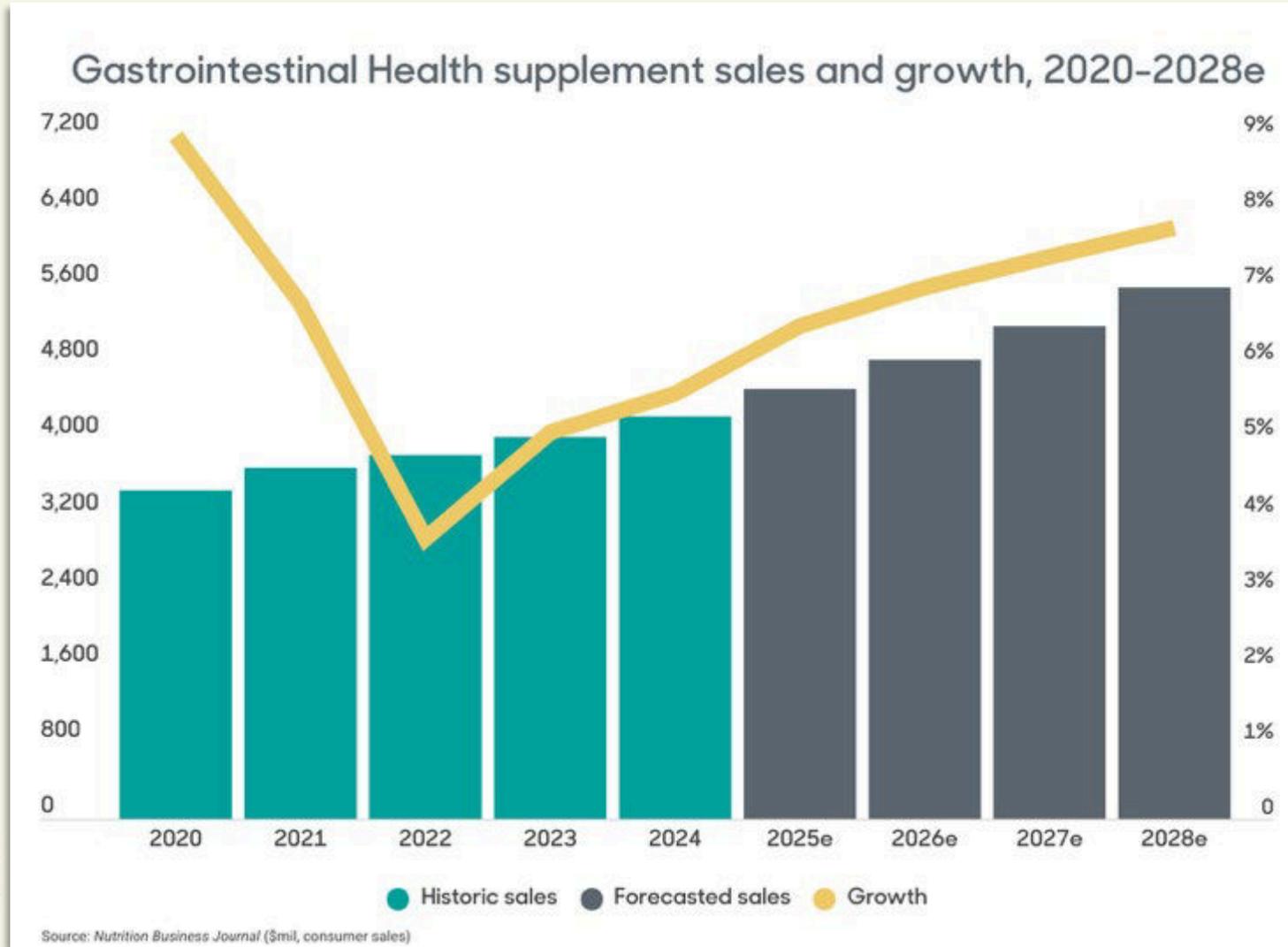
Reduce belly fat and support metabolism with morosil, black ginger, B12 and Chromium.



Culturelle Metabolism + Weight Mgmt Probiotics

Support weight management by promoting healthy metabolism and physical & mental energy with SlimBiotics clinically studied strain shown to target bodyfat and a healthy body shape

Microbiome/gut health becoming a foundational pillar of modern wellness routines



+ \$1.08b

increase between
2025 and 2028

+ 6.5% 2025 growth

+ 7.4% CAGR from
2025-2028

Ingredients of note in 2025:

Probiotics
5.5% growth
25.5% mkt share

Synbiotics
7.2% growth
17.1% mkt share

Fiber
8.6% growth
13.2% mkt share

Market manifestations: Gastrointestinal Health



MaryRuth's Fiber Gummies

Supports digestive health with pectin-based formula; 3g of fiber each, clean-label certified, fiber in a fun format



Pendulum

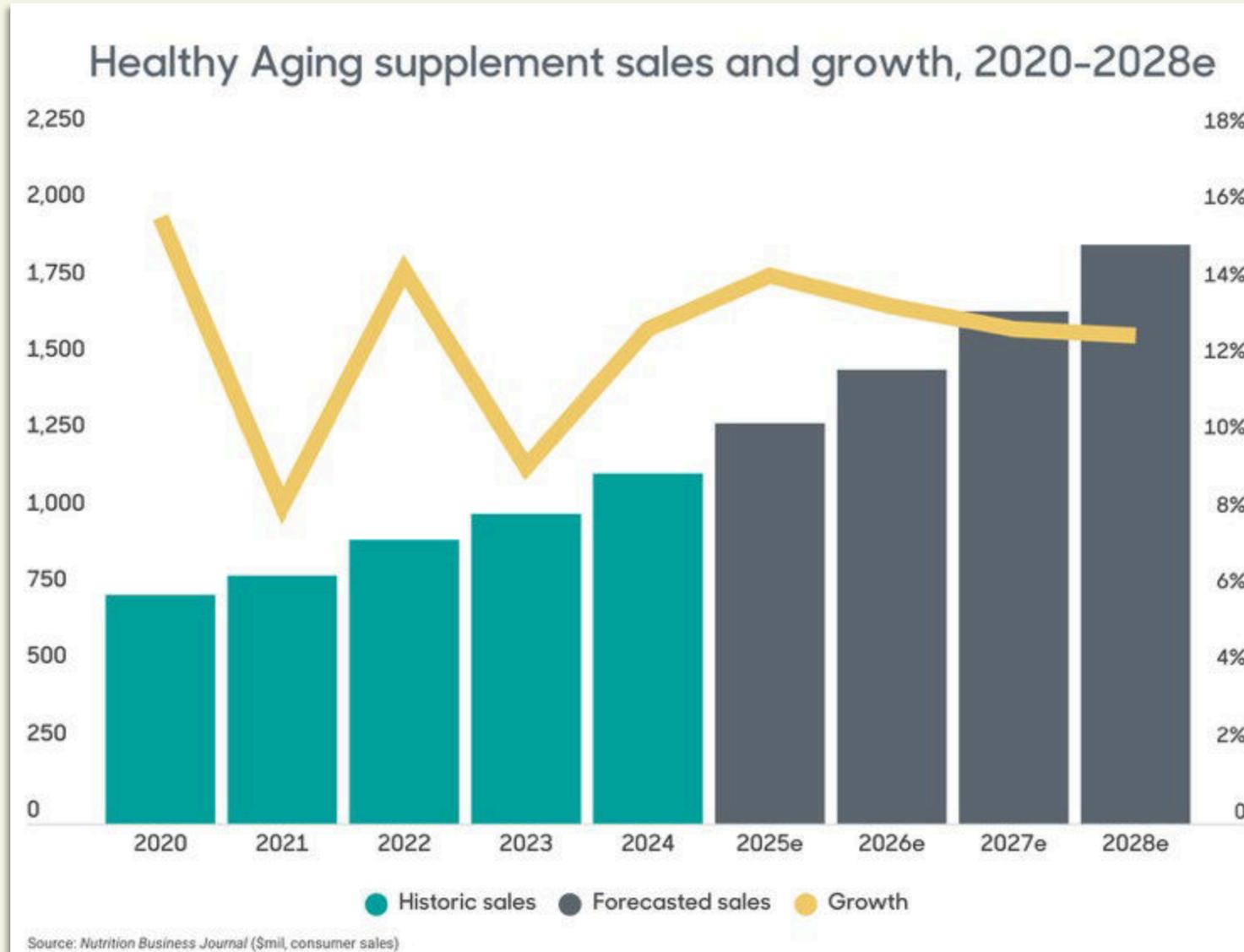
100m AFU of *Akkermansia muciniphila* live probiotic strain to fortify gut lining a permeability; also promoted to boost GLP1 production and metabolism



NewChapter AllFlora Digestive Supergreens

Super greens powder with clinical strength digestive enzymes for improved digestion & gut health

Healthy aging is evolving into a multi-decade wellness priority



+ \$581m

increase between
2025 and 2028

+ 14.3% 2025 growth

+ 13.1% CAGR from
2025-2028

Ingredients of note in 2025:

NAD Precursors

34.8% growth
15.7% mkt share

Collagen

25.1% growth
7.9% mkt share

Multis

25.4% growth
6.5% mkt share

Market manifestations: Healthy Aging



Opositiv Meno Healthy Aging Powder

Whey protein, collagen, probiotics and other nutrients formulated for women aged 40+; supports joint, bone, cognition, brain health, weight mgmt., and lean muscle mass



IM8 Daily Ultimate Longevity: Healthy Aging

NMN NAD+ Booster and Cellular Protection work together to enhance mitochondrial function, promote autophagy, and deliver comprehensive age-defying benefits in one delicious daily drink



Metagenics PhytoMulti

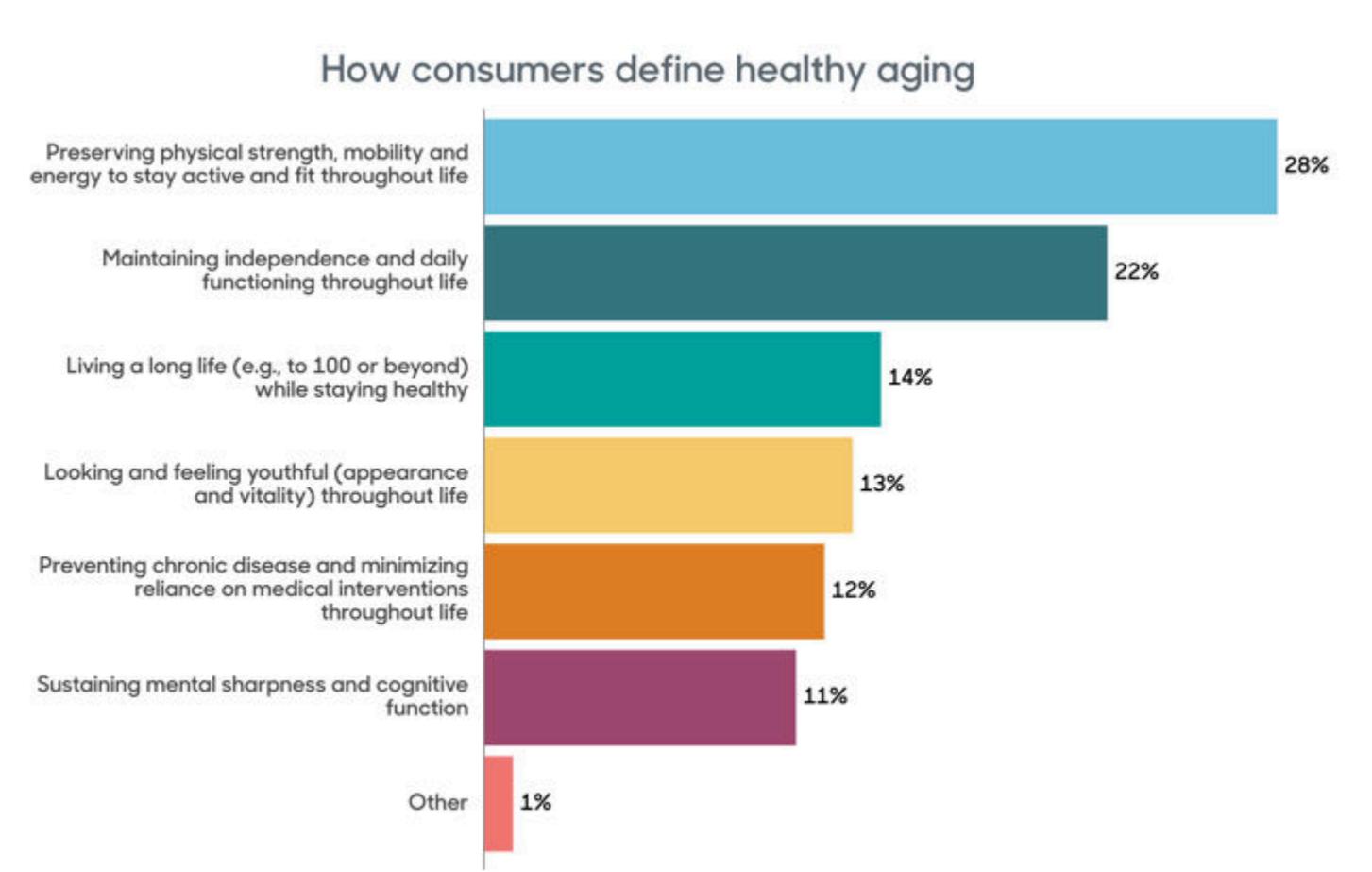
Supports 7 key body functions, including brain health, digestion, energy production, immune health, liver support, skin health with phytonutrients to promote healthy aging, overall wellness & cellular health

What even is healthy aging?

Different age groups have different priorities, right?

Yes AND....

Younger consumers still are more likely to define healthy aging as “sustaining mental sharpness & cognitive function”



Source: Nutrition Business Journal surveys targeting general consumers, aged 19-75. Completed January 2026; N=1,000; powered by the Suzy online platform. Question: "Which of the following best describes your personal definition of "healthy aging"? (Select one.)"

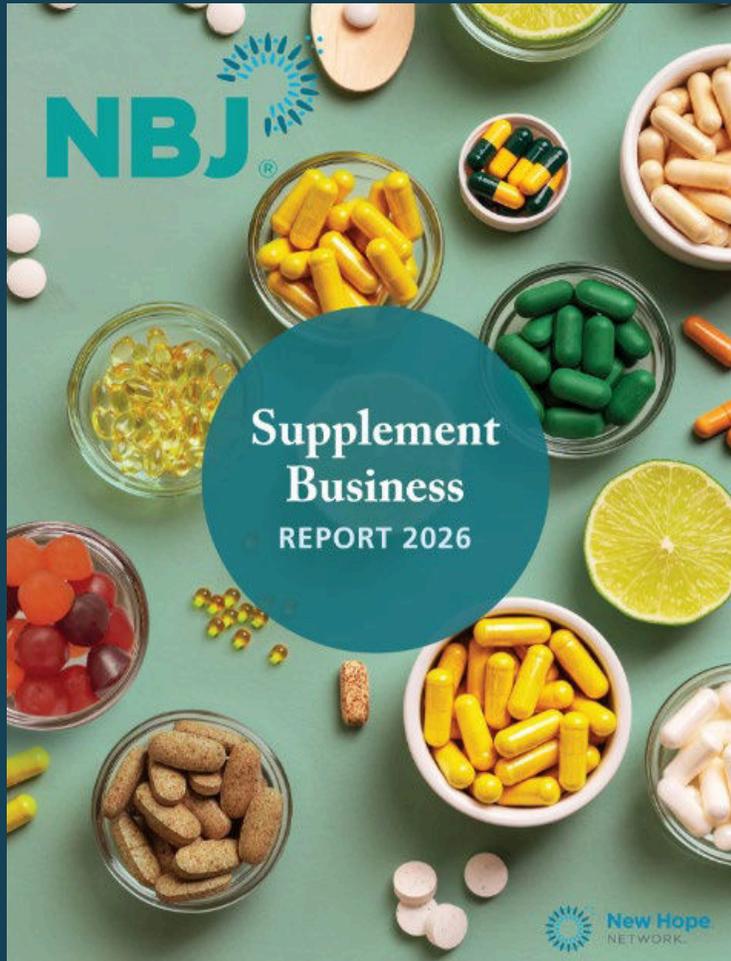
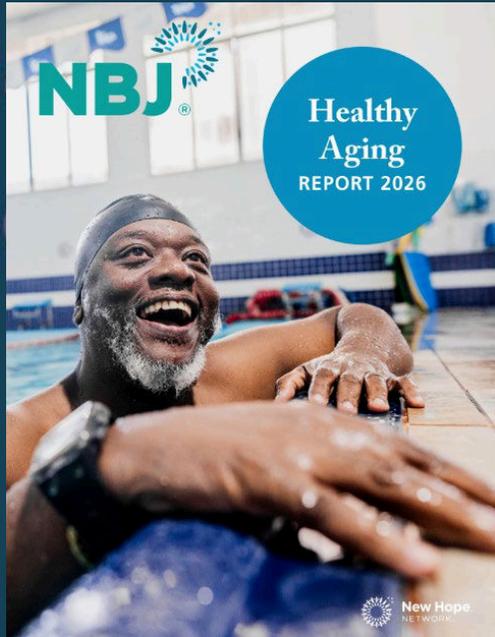
Macro Trends

Preventive health is accelerating earlier in the consumer lifecycle

Growth is being driven by deeper engagement and routine expansion, not just new users

Wellness spend is becoming more intentional amid broader budget scrutiny

Wellness routines are converging around outcomes, enabled by personalization and data-driven tools



Winning with Social Commerce: A Deep Dive into Supplements & Social



Jack O'Leary

Director, eCommerce Thought Leader
NielsenIQ

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Product Discovery Powered by



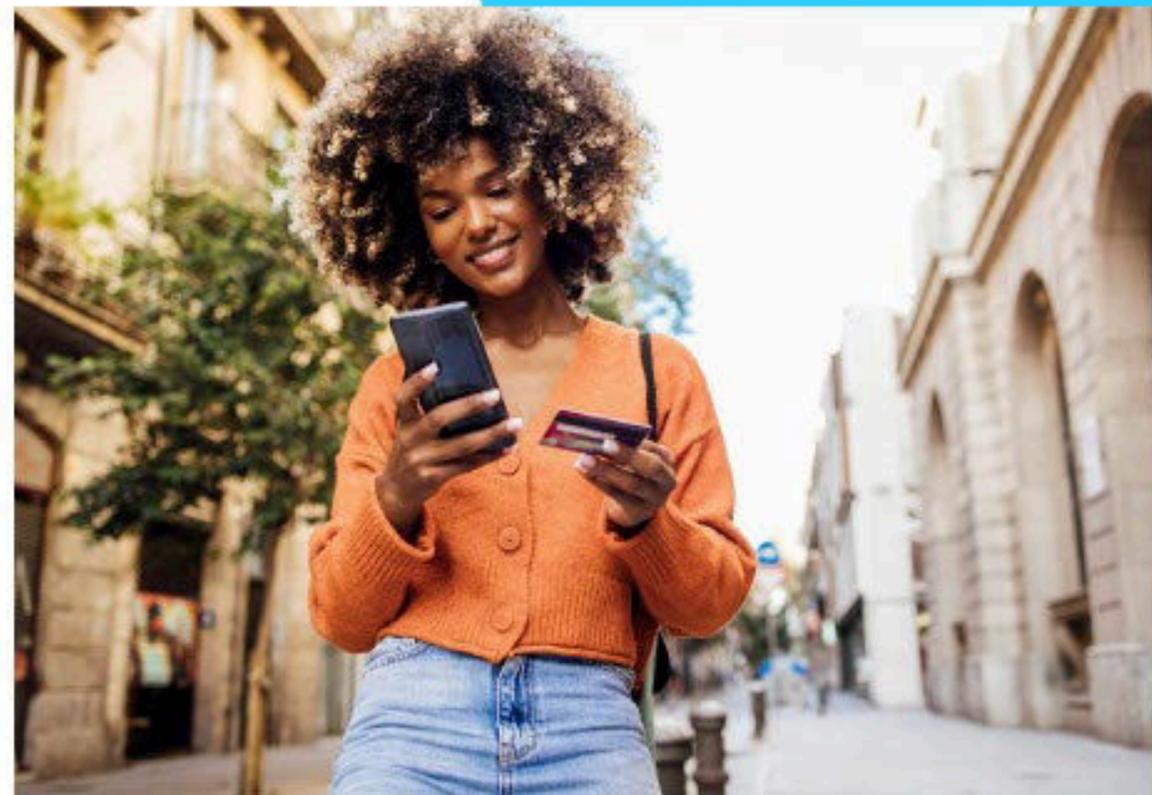
By Informa Markets

Winning with Social Commerce

A Deep Dive Into Supplements and Social

Jack O'Leary – Director, eCommerce Thought Leadership, NielsenIQ

March 2026



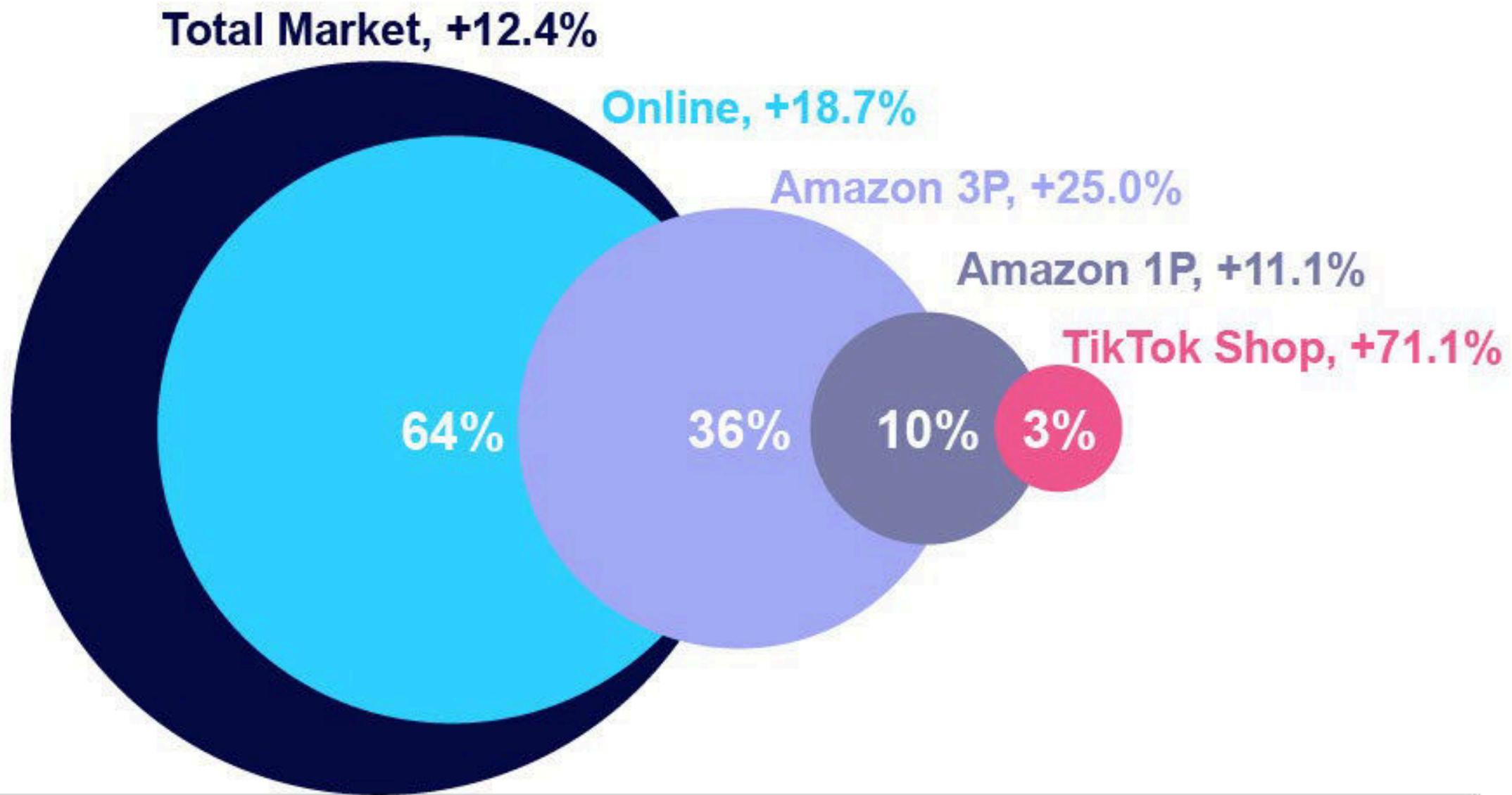
NIQ delivers the *Full View* of buying behavior

- The industry's most trusted consumer data—more channels, sources, consumers, and regions
- Validated with point of sales data directly from retailers



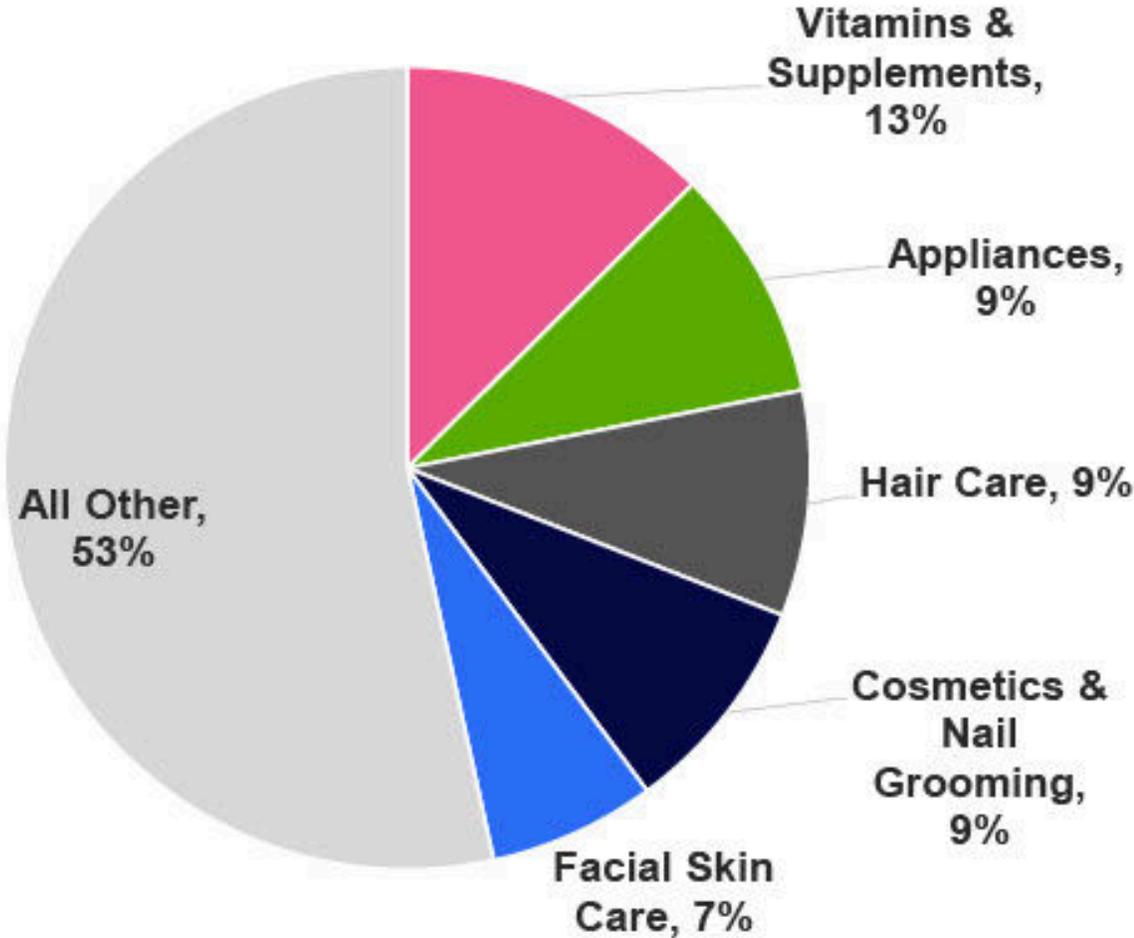
Most supplements sales happen online today

US Vitamins & Supplements \$ Sales - Share of Total Market and % Growth vs. YA

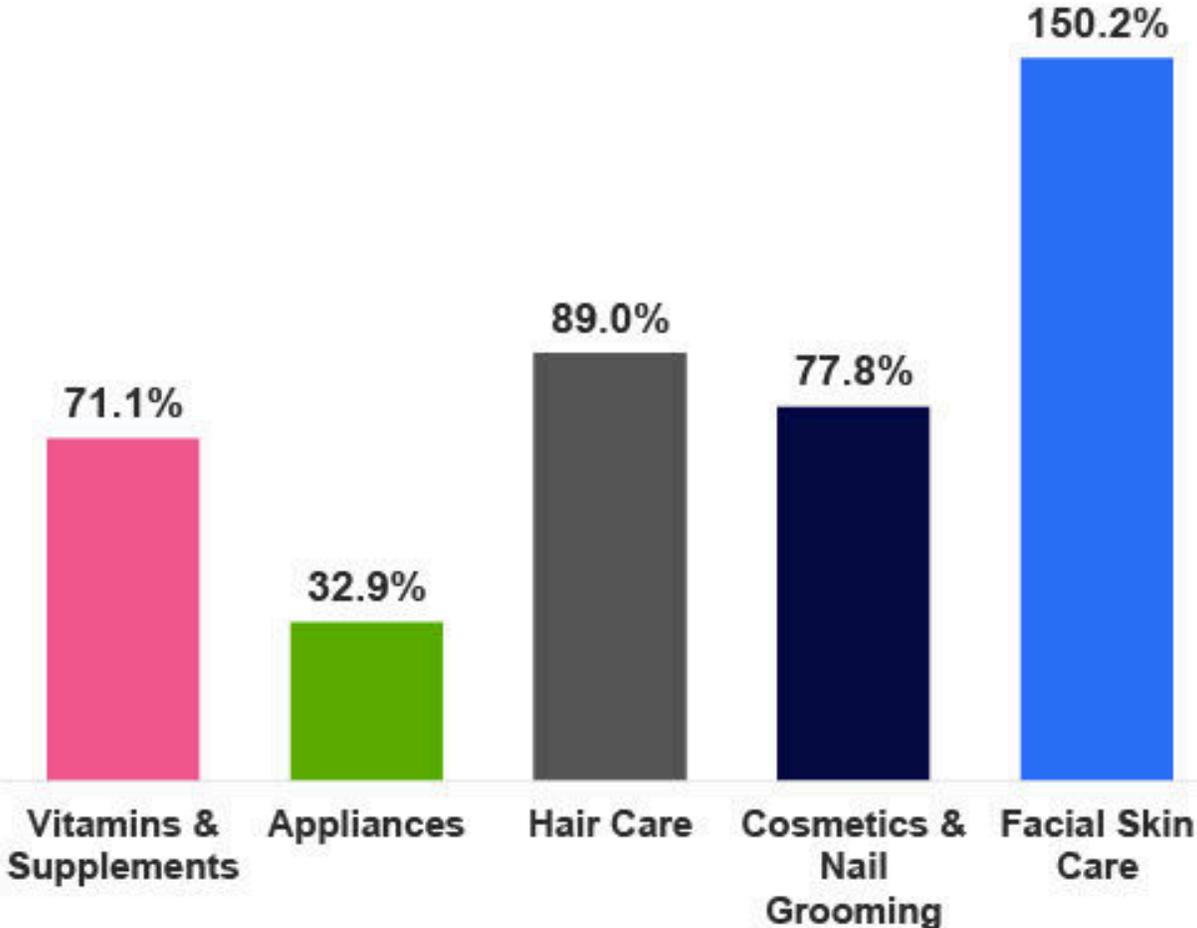


Supplements is the largest category on TikTok Shop today

Top 5 Categories Share of TikTok Shop Total Sales

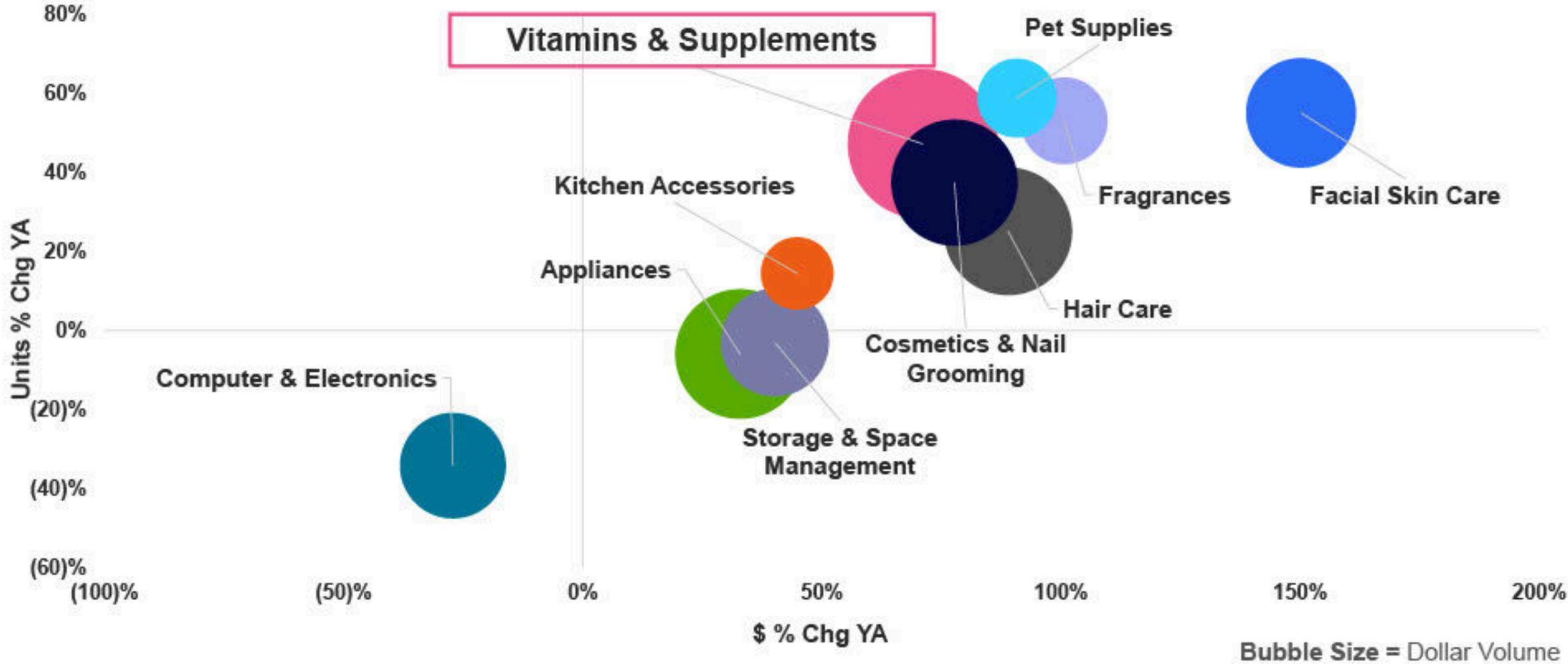


Top 5 TikTok Shop Categories \$ % Chg vs YA



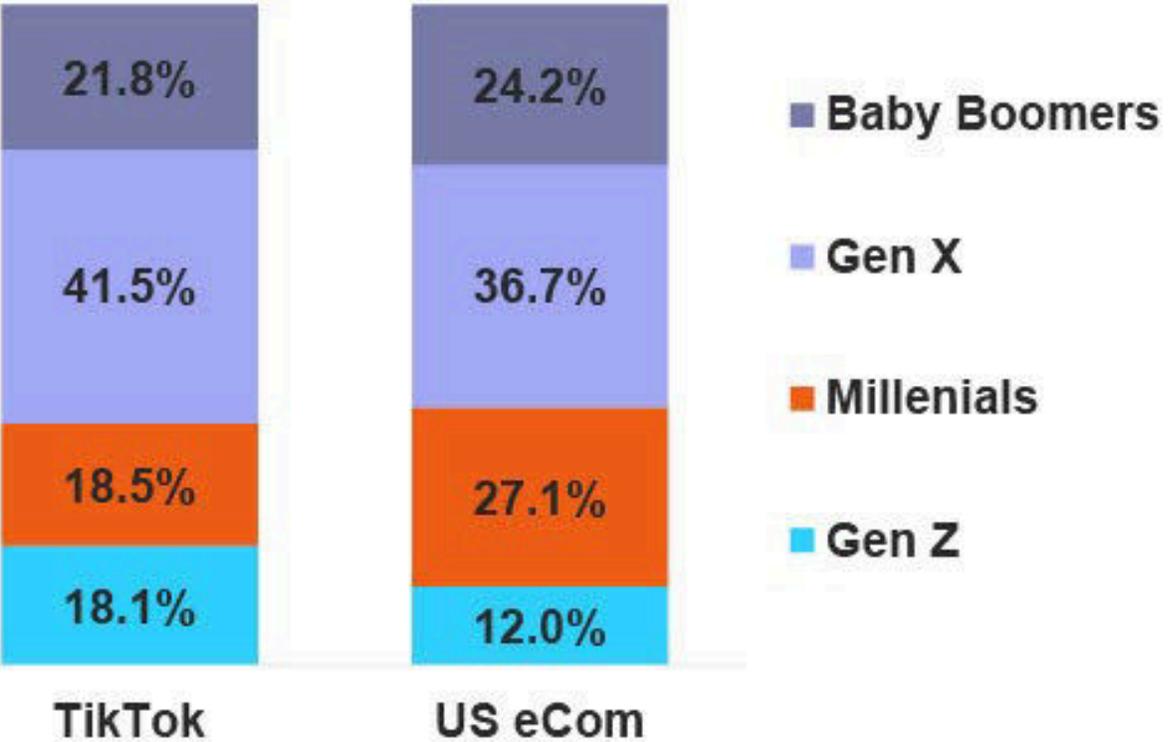
Supplements leading other TikTok categories in growth

TikTok Shop Top 10 Categories by \$ Sales

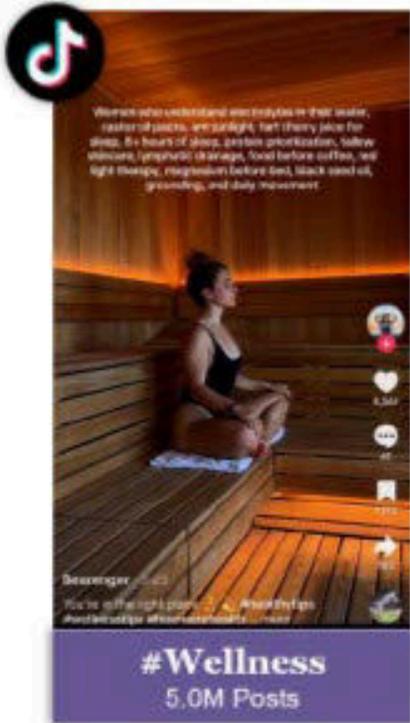


Gen Z and Gen X over index for supplements purchases on TikTok shop

Supplements Share of \$ Sales by Generation



The influence of influencers



18%
of consumers say
social media influencers
impact the brands I buy.

Gen Z X More Likely To

2.1X

*Say Social
Media is Media
Trusted the
Most*

1.3X

*Use Social
Media to Obtain
Healthcare Info*

Trends to think about: Convergence of food and supplementation

	Supplements	Food and Wellness	
Beauty			<p>Beauty + Wellness worth \$160.8B</p>
Gut Health			<p>Digestive Health +9% Dollars +6.5% Units</p>
Protein			<p>40g+ Protein per serving* +30% Dollars +31% Units</p>
Hydration			<p>Hydration Health (VMS) +21% Dollars +22% Units</p>

Source: NIQ Retail Measurement Services; Total US xAOC; Total Store; NielsenIQ Product Insights; Dollars & Units % Change vs year ago; 52 weeks ending September 6, 2025 | Beauty+ Wellness Omnishopper, 52 weeks ending April 19, 2025

*Food & Beverage trends

Numerous examples of this convergence occurring

	Supplements	Food and Wellness	
Sleep/ Mood			<p>Mood & Stress support*</p> <p>+50% Dollars +75% Units</p>
Energy			<p>Energy</p> <p>+6% Dollars +6% Units</p>
Women's Health			<p>Peri-menopause support</p> <p>+30% Dollars +91% Units</p>

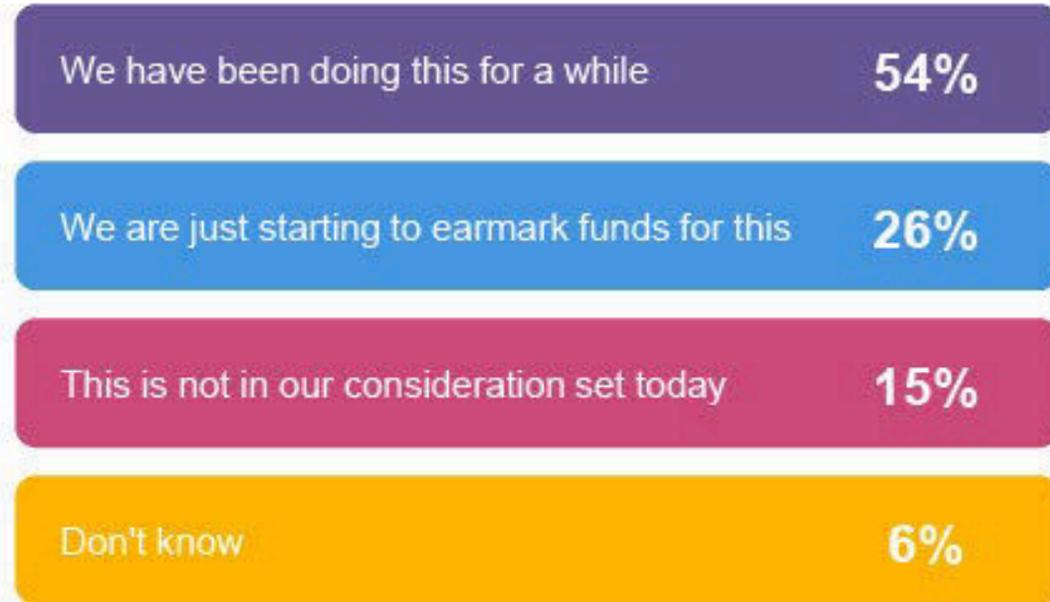
Source: NIQ Retail Measurement Services; Total US xAOC; Total Store; NielsenIQ Product Insights; Dollars & Units % Change vs year ago; 52 weeks ending September 6, 2025

*Food & Beverage trends

Suppliers feel a disconnect between funds allocation and preparedness with social

MANUFACTURERS

“To what extent is your company **allocating funds** to capitalize on social trends?”



“To what extent is your company **able to quickly respond** to emerging social trends?”



Thank you!

Jack.oleary@nielseniq.com

NielsenIQ

The State of Supplements



Susan Enfield

Sr. Digital Content Editor
Nutrition Business Journal
New Hope Network



Rob Robillard

CEO
Country Life



Colin Watts

CEO
Thorne



Jack O'Leary

Director, eCommerce Thought Leader
NielsenIQ

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By Informa Markets

THORNE : The Most Trusted Name in Scientific Wellness

Since 1984

Industry-Leading Trusted Consumer Brand



\$500M 2025 Net Sales

+32% '23'-25 CAGR

#1 Trusted VMS Brand

#1 NPS Among Consumers

40-Year Clinical Heritage Powering Multi-Channel Growth



- **1984** Founded exclusively for HCP's
- **2016** eCommerce expansion
- **Today** Consumer-centric with scaled DTC

+57% Combined DTC YoY Growth

#1 Fastest Growing Brand on Fullscript

Uniquely Serving Consumer Needs Across Wellness & Performance



Foundational Health & Targeted Wellbeing



Women's Health & Healthy Aging



Performance



Iconic Brands That Inspire Greatness



Proven Heritage

55-Year History
of Exceeding Wellness Standards

Born in the **Natural**
Independent Retail Space

Complete & Comprehensive
Wellness Solutions

Certiably Different

Backed by **Certifications**
that Matter

Our **5 Point Pledge of Integrity**

B-Corp & GMP Certified

Present-Day Impact

Will Reach **\$100M** in 2026

Double Digit Growth for
Country Life and Desert Essence

Tripled E-Commerce Revenue
from 2023 – 2026

The State of Supplements



Scott Dicker

Sr. Director, Market Insights
SPINS

Co-located with



Product Discovery Powered by



By Informa Markets



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Vitamins & Supplements:
Market Overview

Who is the Consumer:
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Evolving Essentials and Innovation

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What's on my mind

Market Overview

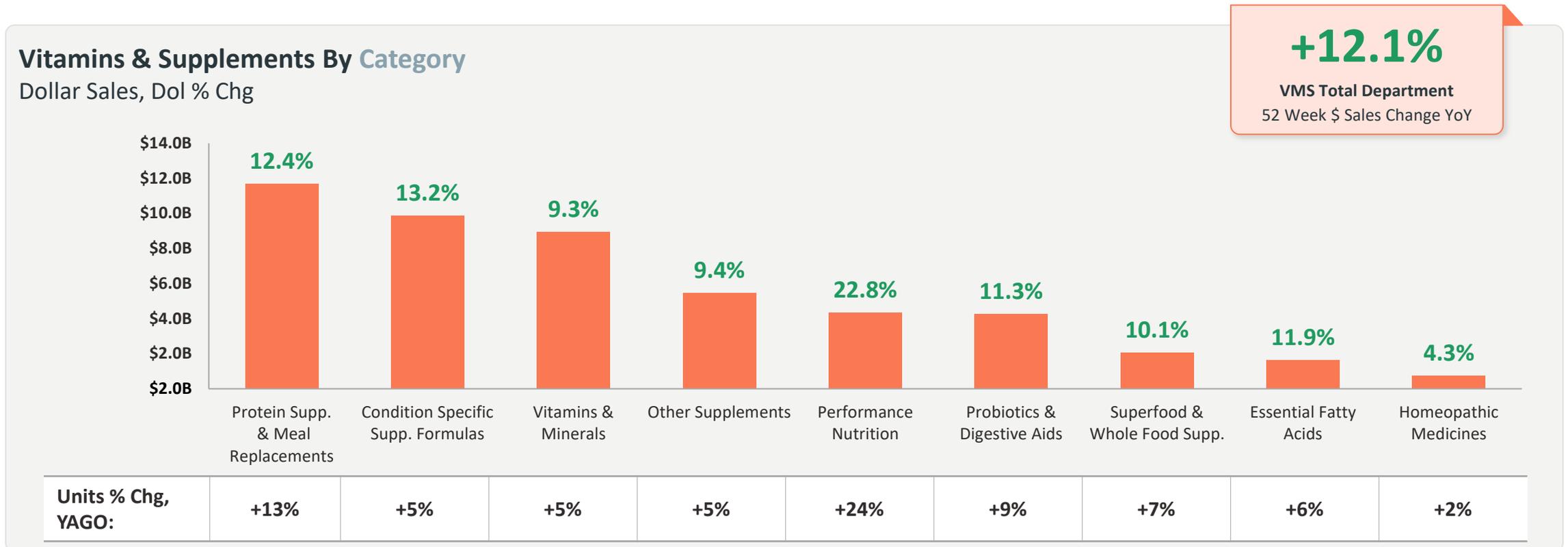
Supplements are growing in every channel

Prices are stabilized while dollars and units are rising.

Natural Expanded Channel <i>% Chg YAGO</i>	Conventional MultiOutlet <i>% Chg YAGO</i>	Convenience Channel <i>% Chg YAGO</i>	Amazon <i>% Chg YAGO</i>
+6.2% DOLLARS	+5.2% DOLLARS	+12.1% DOLLARS	+19.6% DOLLARS
+7.8% UNITS	+6.1% UNITS	+4.1% UNITS	+17.8% UNITS
-1.5% ARP	-0.9% ARP	+7.7% ARP	+1.5% ARP

Source: SPINS Total store US Natural Enhanced Channel, Amazon, Conventional Multioutlet , Convenience Channels (powered by Circana)
Department: Vitamins & Supplements
52 Weeks ending 12.28.25

Fitness-oriented products are no longer limited to athletes.
 Performance nutrition is the fastest growing supplement segment, nearly doubling the growth of VMS.

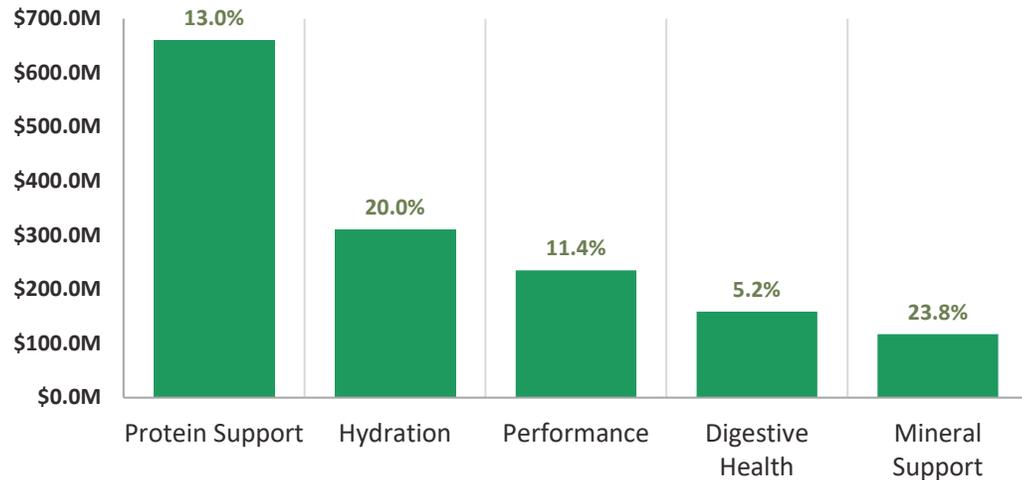


* % Represents % Change YoY (vs same time LY)

Consumers remain committed to muscle health through supplements targeting protein intake, hydration, and general performance

Vitamins & Supplements By Health Focus Attribute

Abs Dol Chg, Dol % Chg



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

Functional Ingredient	\$ Sales	\$ % Chg
Protein – All Combined	\$8.6B	+9.1%
Electrolytes	\$266M	+21.9%
Creatine	\$171M	+44.0%
Magnesium	\$150M	+14.6%
Probiotic Supplement	\$73M	+3.5%
Fish Oil Concentrate	\$68M	+7.7%
Milk Thistle	\$67M	+47.7%
Theanine	\$59M	+68.4%
Ashwagandha	\$49M	+14.0%
Beet Root	\$42M	+15.8%

Source: SPINS Natural Channel, Amazon (Powered by Stackline), Convenience & Multi-Outlet (MULO) (Powered by Circana)
Dept: Vitamins & Supplements, Attribute: Health Focus (excluding Unknown), 52 Weeks Ending 12.28.25

Consumer Trends and Insights

Data-Driven Health Is Reshaping Proactive Health Management

AI, Wearables & Health Tracking

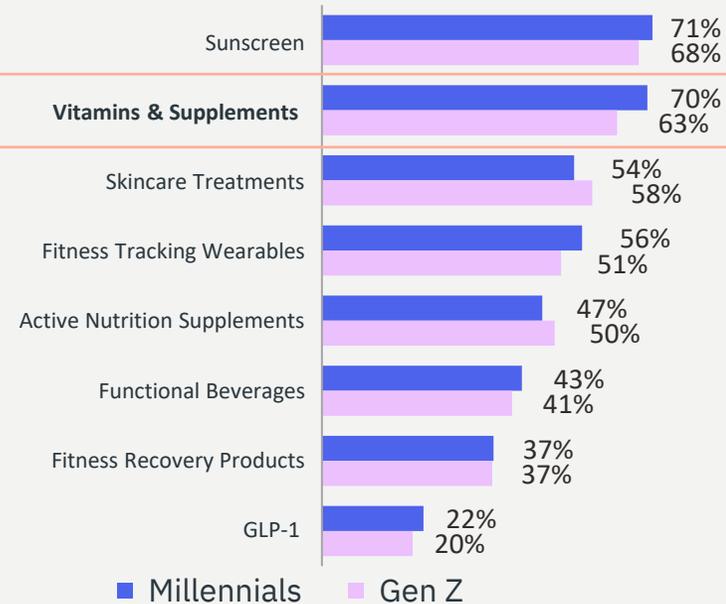


- Hypertension
- Sleep Score
- Heart Rate
- Vitals/ECG
- Blood Oxygen
- Cycle tracking
- Activity/Workout
- Temperature
- Antioxidant Index

15%

of Gen Z and Millennials are turning to AI tools for product learning, with **11%** ranking AI chatbots among their top discovery methods.¹

Younger Generations' Personalized Health Routines (% Currently Using/Consuming)



Younger Shoppers are embracing Vitamins & Supplements at a faster rate, with +1.5% more Millennial households buying this year (2x the growth of total households)

<https://www.samsungmobilepress.com/feature-stories/great-health-can-happen-overnight-with-galaxy-watch>
<https://www.apple.com/newsroom/2025/09/apple-debuts-apple-watch-series-11-featuring-groundbreaking-health-insights/>

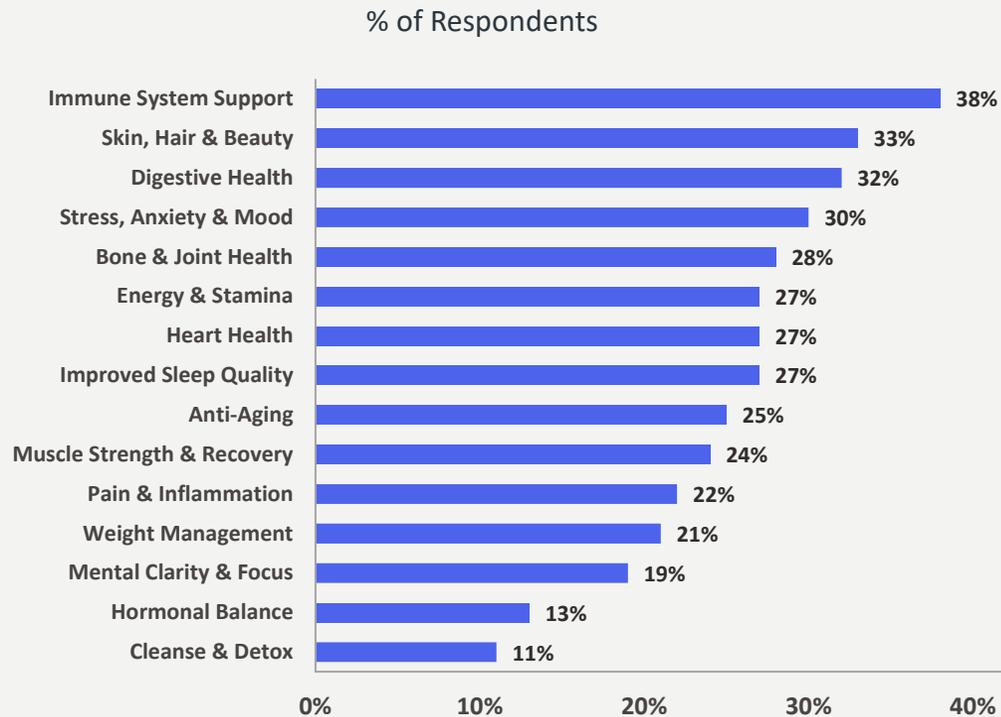
1: July 2025 SPINS survey of total U.S. Gen Z and Millennial shoppers aged 13-44 (n = 1000)

"Which websites or social media platforms do you typically use to learn about new products?, How do you typically discover new products?"

2: <https://www.preparedfoods.com/articles/130753-danone-survey-reveals-gut-health-awareness-grows-but-key-knowledge-gaps-persist>

Supplement Demand Is Universal As Priorities Shift By Age

Top Health Goals When Buying Supplements



Generational Differences in Supplement Priorities

Stronger Routine Adoption With Age



73%

of people who take supplements, do so **daily**, including 71% between ages 35–49, with daily intake peaking at 90% among adults 65+

Gen Z Seeking Stress & Mood Support



44%

Of supplement consumers aged 18-24 are seeking mood & stress support, highlighting mental wellness needs and early interest of mood-focused supplements

Science-Backed Credibility and Third-Party Validation

What Influences Your Choice Of Supplement Brand Or Product The Most?

32% Strong Brand Reputation

30% Backed By Clinical or Scientific Research

29% Recommended By Trusted Sources

24% Positive Reviews Or Social Media Influence

3rd Party Testing



INFORMED



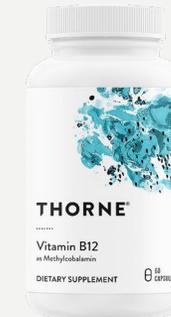
Consumer Lab



United States Pharmacopeia (USP)

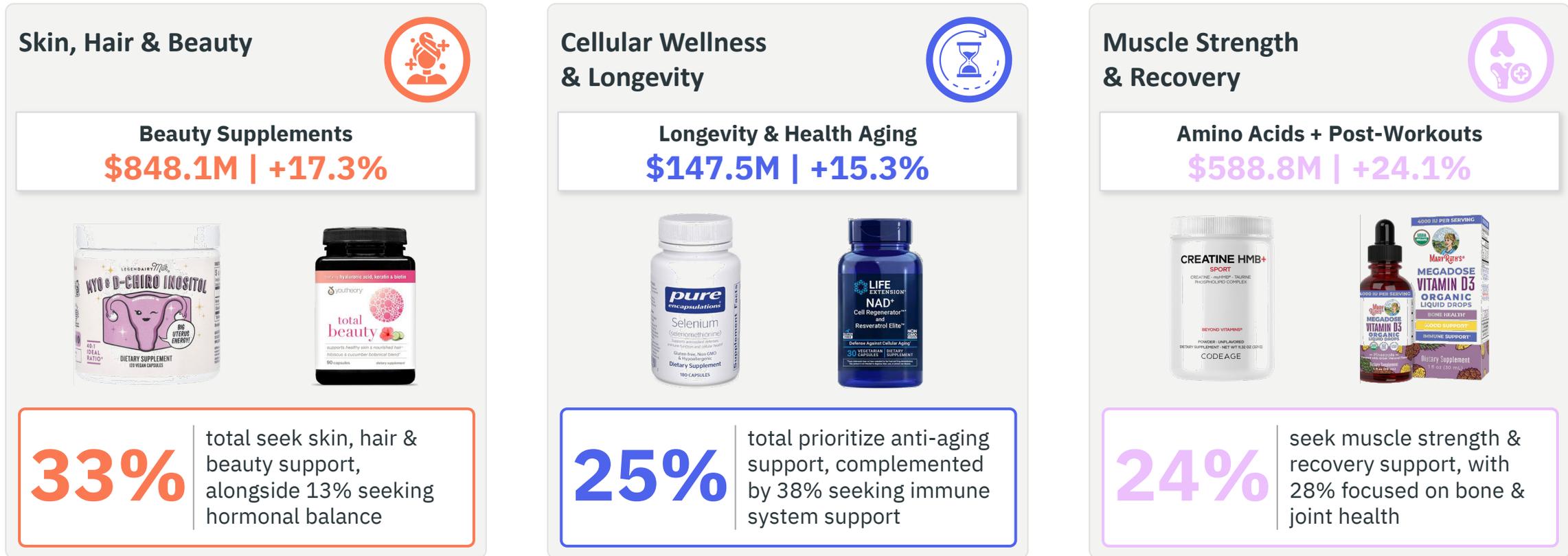


Practitioner/Clinical-Focused



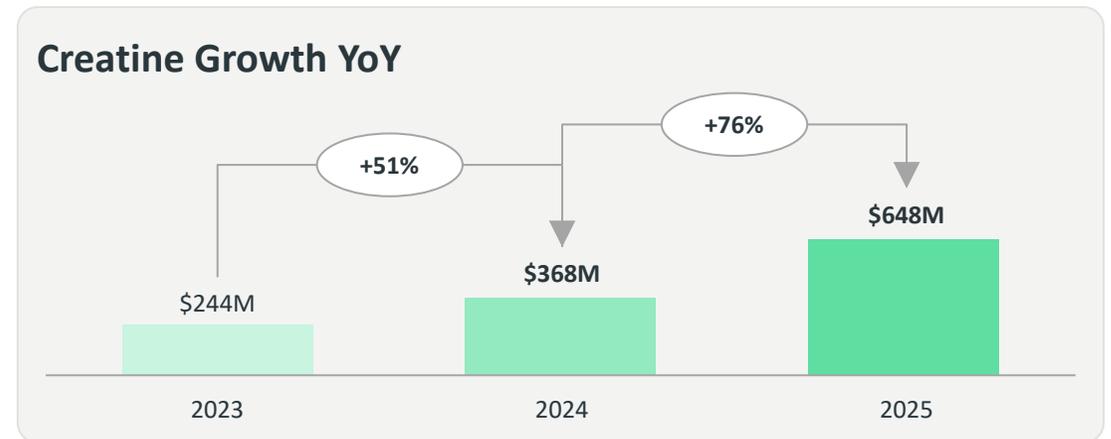
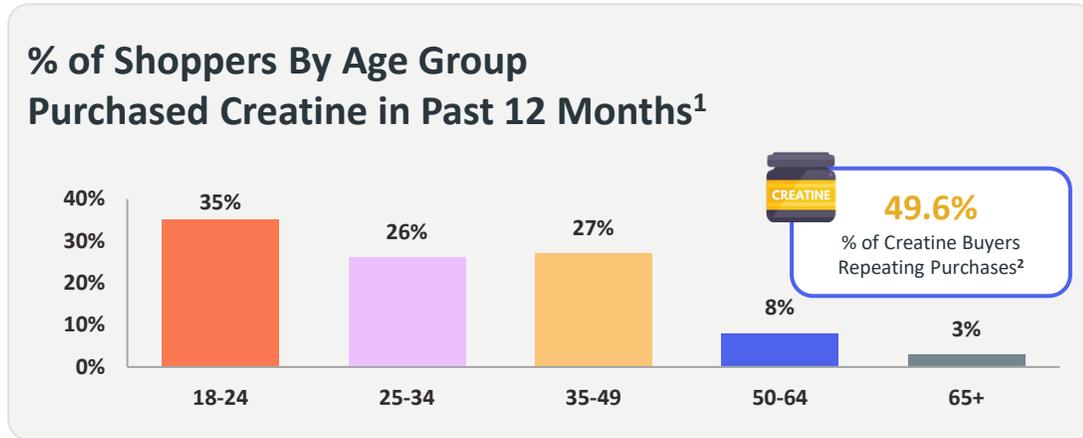
Category insights

Aging Well Is Unifying Once-Siloed Supplement Categories



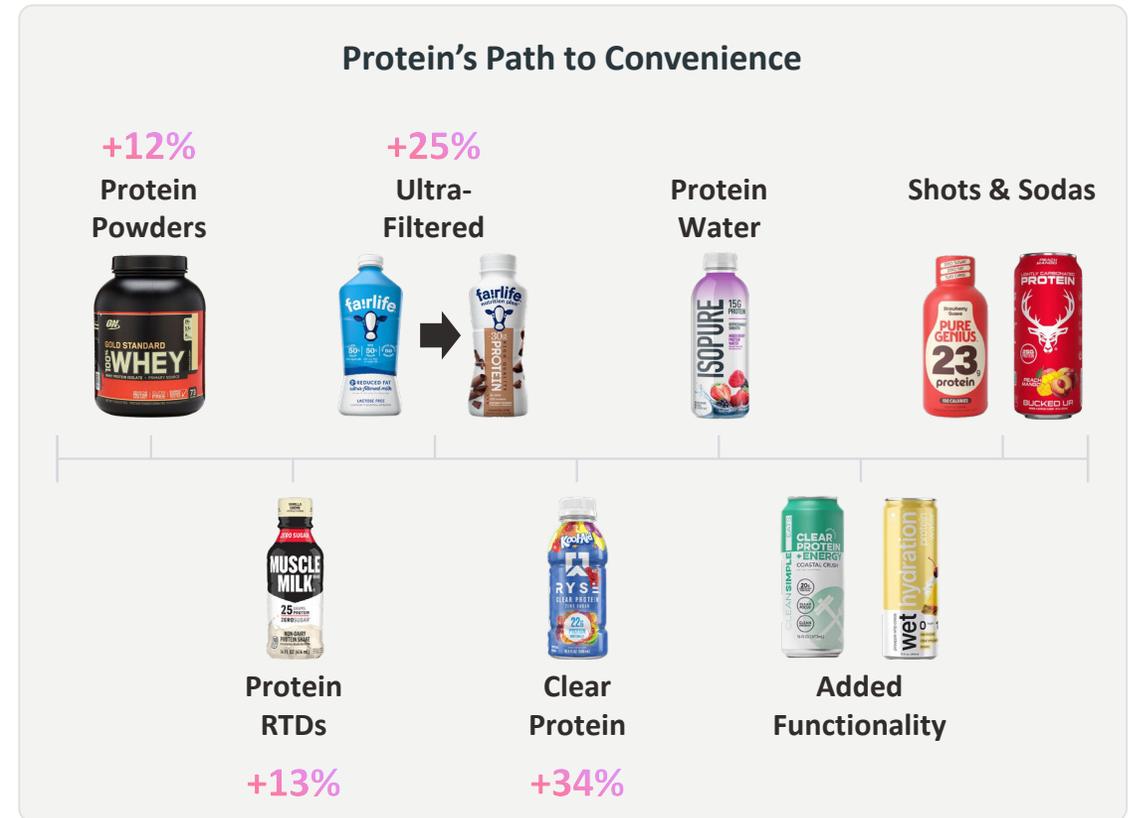
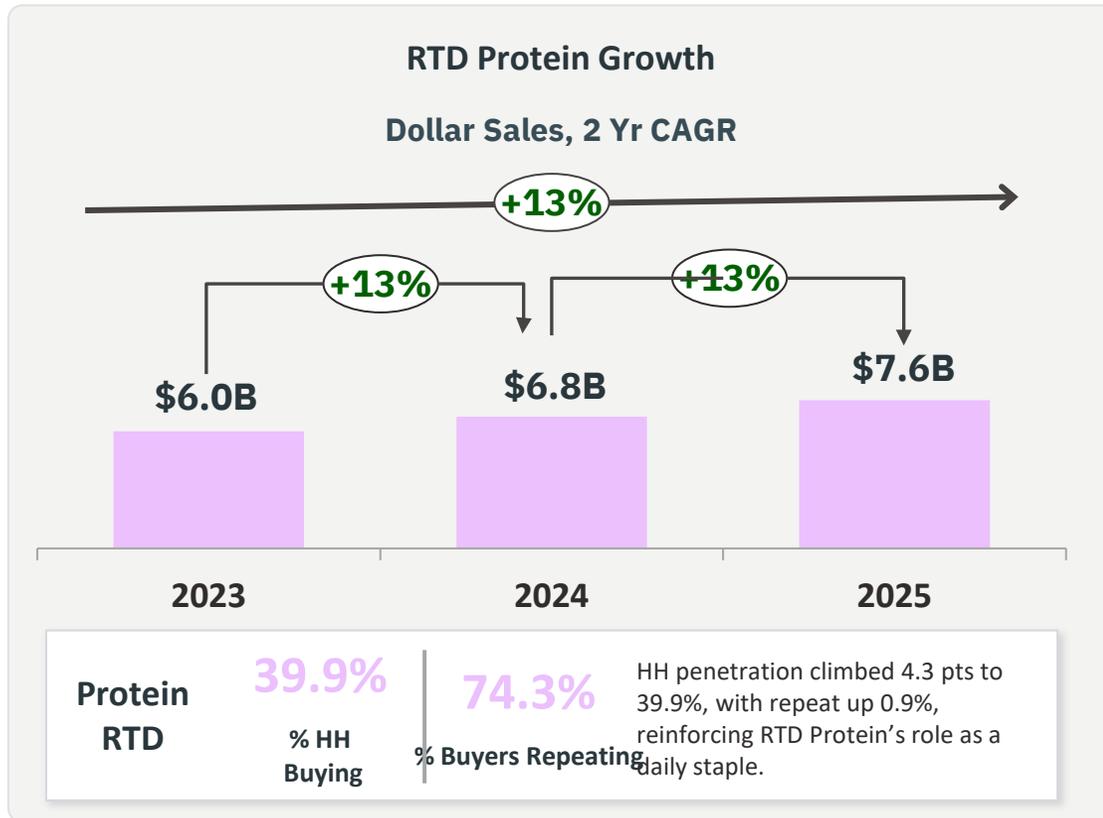
Source: SPINS Natural Channel + Multi-Outlet (MULO) (Powered by Circana) + SPINS Amazon Market Measurement (Powered by Stackline)
Dept: Vitamins & Supplements, Subcategory: Beauty Supplements, Amino Acids + Intra/PostWorkouts, Health Focus: Longevity & Health Aging, 52 Weeks Ending 12/28/25
VMS Attitude & Usage Survey, N = 1,000 VMS Shoppers; Fielded May 9th – 21st, 2025, Survey Run Independent From Sales Data Trending Ingredients
*Question: What are your top health goals when choosing a supplement?

Niche to Normal: Creatine Without Limits



Source: SPINS Natural Channel + Multi-Outlet (MULO) + Amazon, Dept: Vitamins & Supplements, Subcategory: Creatine, 52 Weeks Ending 12/28/25
 1: VMS Attitude & Usage Survey, N = 1,000 VMS Consumers; Fielded May 9th – 21st, 2025, Survey Run Independent From Sales Data
 “Which of the following supplements or functional ingredients have you purchased in the past 12 months? Creatine, By Age Demographic”
 2: SPINS – Enhanced National Consumer Panel, Subcategory: Creatine, 52 Weeks Ending 12/28/25
 3: <https://www.suppliesidesj.com/market-trends-analysis/10-emerging-supplement-trends-2026>

Protein is becoming format-flexible, expanding usage occasions beyond traditional sports nutrition.



Source: SPINS Natural Channel + Multi-Outlet (MULO) + Convenience (Powered by Circana) + Amazon (Powered by Stackline)
 Source: SPINS Natural Channel + Multi-Outlet (MULO) + Convenience (Powered by Circana) + Amazon (Powered by Stackline)
 Dept: Vitamins & Supplements, Grocery, Refrigerated, Attribute: Ultra-Filtered, 52 Weeks Ending 12/28/25
 Dept: Vitamins & Supplements, Grocery, Refrigerated, Attribute: Ultra-Filtered, 52 Weeks Ending 12/28/25

Protein continues to boast strong growth

Back to Protein Basics

Over half (56%) of younger shoppers report following a “high protein” diet, while 32% follow a plant-based diet.



Millennials and Gen Z over-index in spend on items with Protein functional ingredients. *While Gen Z only makes up 4% of buyers, they spend 17% more than Gen X (31% buyer share).*

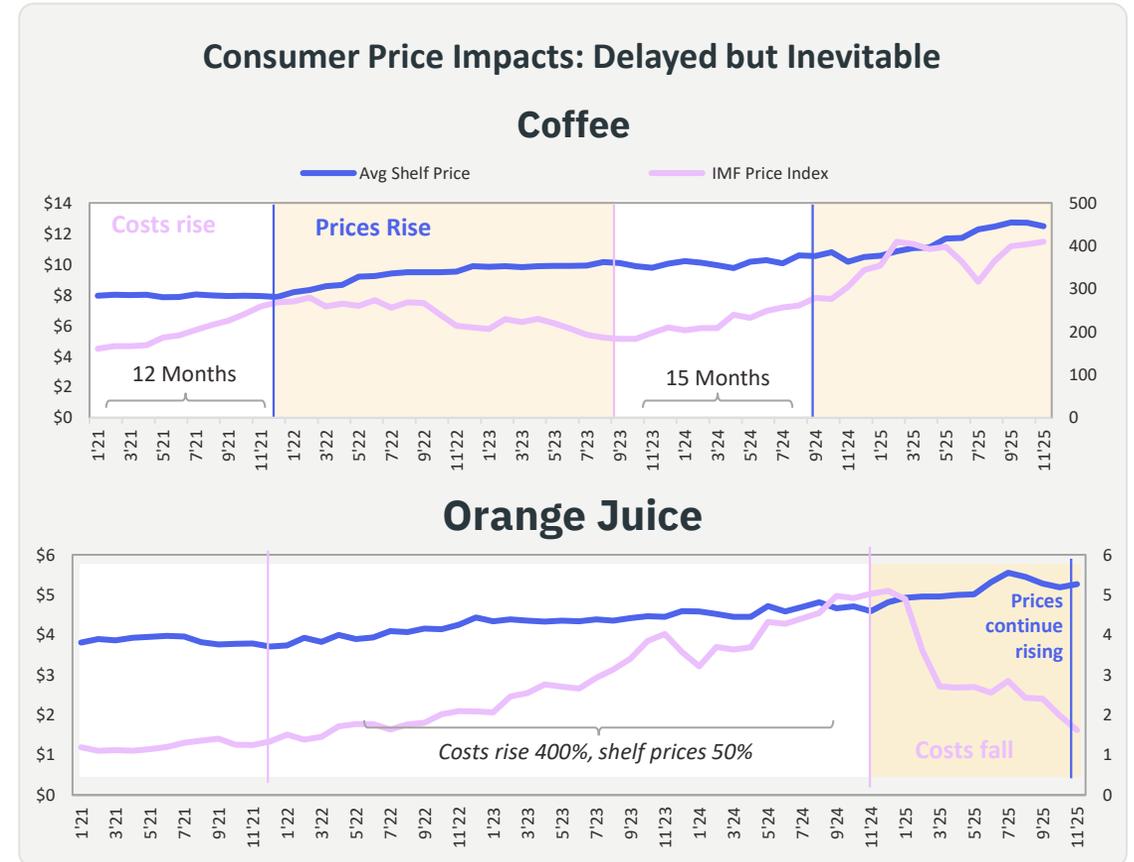
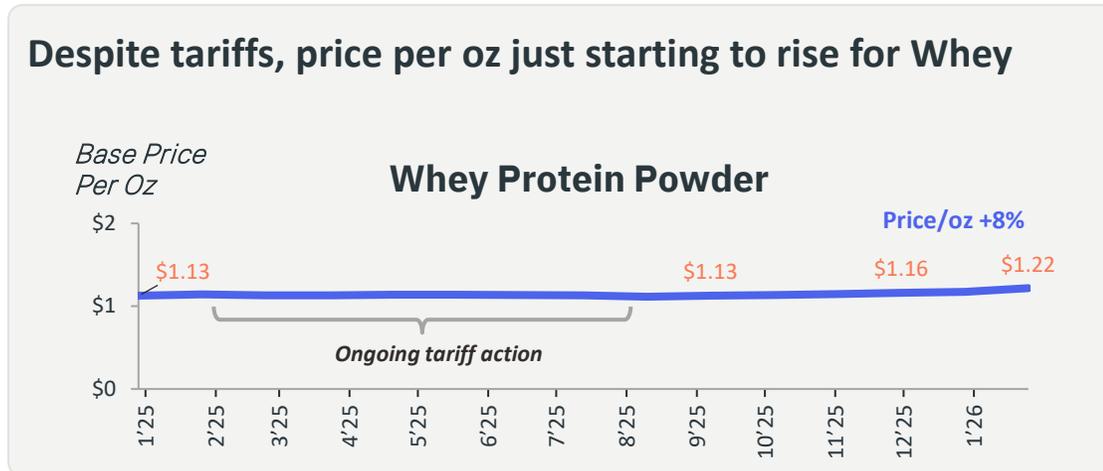
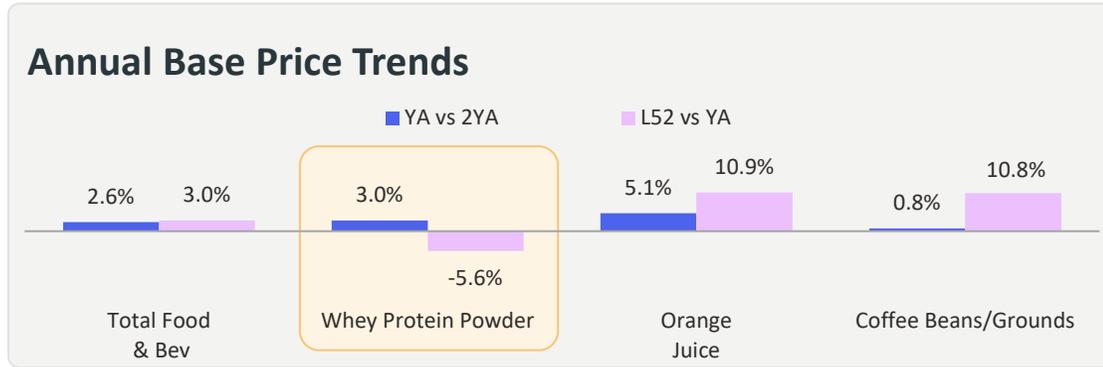
76.6%
% of Protein Buyers Repeating Purchases

+12%
Total Category \$ Growth YoY

Whey Protein Powder is driving the most sales & growth

SOURCE	MARKET SHARE	YOY GROWTH
Whey	43.3%	+13.5% #1
Collagen	20.4%	+1.9%
Plant	16.0%	-6.0%
Animal	4.1%	-5.9%
Blend (Animal & Plant)	3.3%	-0.2%

As Whey Protein awaits cost pressure, Coffee and Orange Juice reflect examples of delayed trickle-down to shelf price



Sources: SPINS Natural Channel + Multi-Outlet (MULO) (Powered by Circana) + SPINS Amazon Market Measurement (Powered by Stackline) . 52 weeks ending 12/28/25.

Protein Powders with Functional Ingredient = Whey

International Monetary Fund, Global price of Orange / Coffee], retrieved from FRED, Federal Reserve Bank of St. Louis. SPINS Price Intelligence;

Kids wellness centers on developmental stages that shape health outcomes

Stage	Primary Needs
Pregnancy	Microbial stability, nutrient transfer
Postpartum	Recovery, mood, lactation
Infancy	Immune programming
Early Childhood	Brain + gut development
Childhood	Cognition, immunity

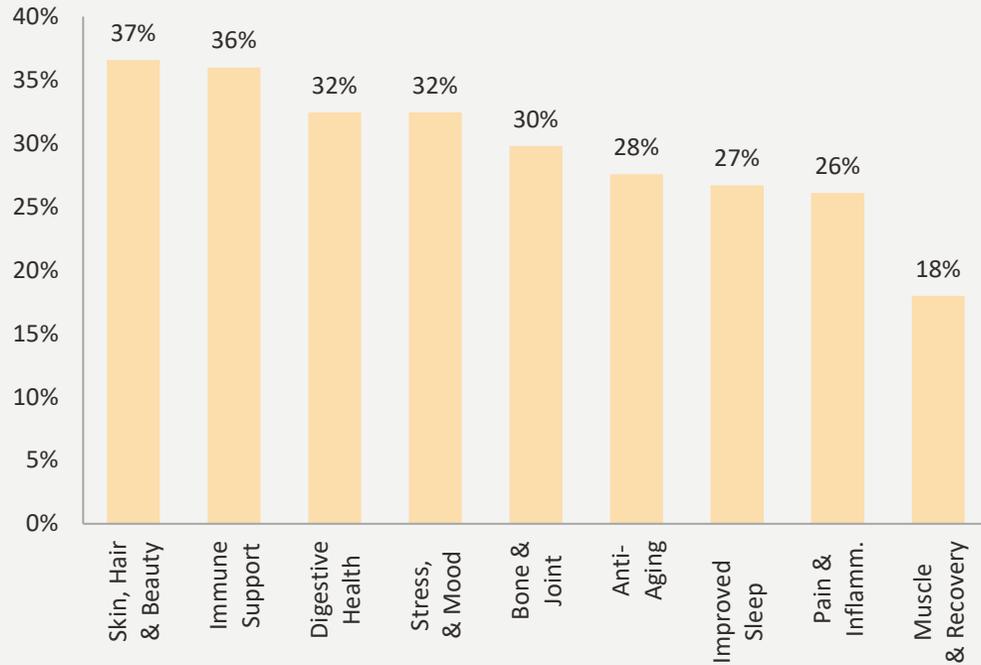


Growth Drivers in Children's Supplements

Functional Ingredient	Total Dollars	Dollars % Change vs YA
Multiple Vitamin	\$14.5M	+26%
Bee Propolis	\$5.8M	+64%
Whole Food Concentrate	\$4.1M	+923%
Echinacea/Goldenseal	\$1.7M	+78%
Lactase Enzyme	\$1.6M	+177%
DHA	\$1.5M	+10%
L-Theanine	\$1.4M	+173%

Women in Active Nutrition

Top Health Goals When Buying Supplements
Sorted to Gender: Women¹



From menstruation through menopause:
Review recaps effects of creatine in
women

NutraIngredients

Better studies now support more benefits of
creatine for women



Active Nutrition - Buyer Index by Age/Gender²

Age	Creatine		Pre-Workout	
	Female	Male	Female	Male
25-34	130	153	175	198
35-44	116	151	136	204
45-54	126	130	126	123
55-64	79	100	62	105
65+	57	71	24	35

Unique Formulations For Health Focus³



Hair & Nail Health



Hormonal Balance



Digestive Benefits



Skin Health

1: VMS Attitude & Usage Survey, N = 1,000 VMS Consumers; Fielded May 9th – 21st, 2026

*Question: What are your top health goals when choosing a supplement?

2: SPINS – Enhanced National Consumer Panel, Demographic Data, 52 Weeks Ending 12/28/25

<https://www.nutraingredients.com/Article/2025/05/30/expert-review-recaps-effects-of-creatine-in-women/>

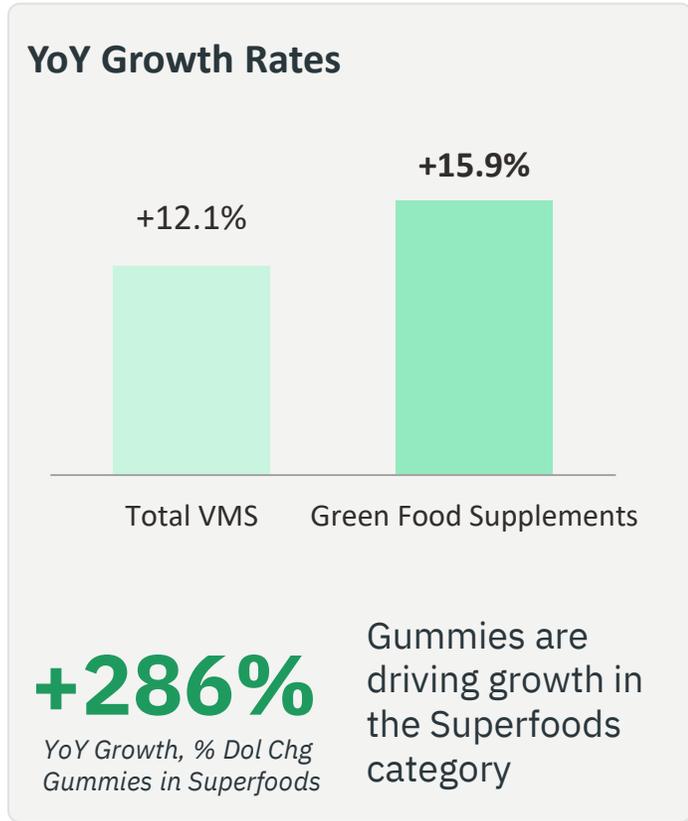
<https://www.supplysidesj.com/healthy-living/better-study-designs-supporting-more-creatine-benefits-for-women-experts-say>

Things I am looking out for

What we will be talking about next year

All-in-One Supplements Maximize Functionality

With numerous wellness ingredients in a single product, consumers can simplify their wellness routines. Convenient, on-the-go formats allow for seamless integration into busy lifestyles



Key Ingredient Trends

- Super Mushrooms (+61%)**
- Prebiotics (+20%)**
- Colostrum (+16%)**

Interest in testosterone is growing

2025 vs. YAGO			
Functional Ingredient	\$ Sales	\$ % Chg	Units
Magnesium	\$1B	+15%	+14%
Vit. D	\$820M	-1%	-1%
Ashwagandha	\$368M	+16%	+15%
Zinc	\$219M	-1%	-2%
Fenugreek	\$74M	-20%	-11%
Tribulus	\$27M	+7%	+4%
Shilajit/Fulvic/Humic	\$11M	+53%	+91%
Boron	\$8M	+19%	+21%
Shatavari	\$4M	-26%	-31%

The sports test booster

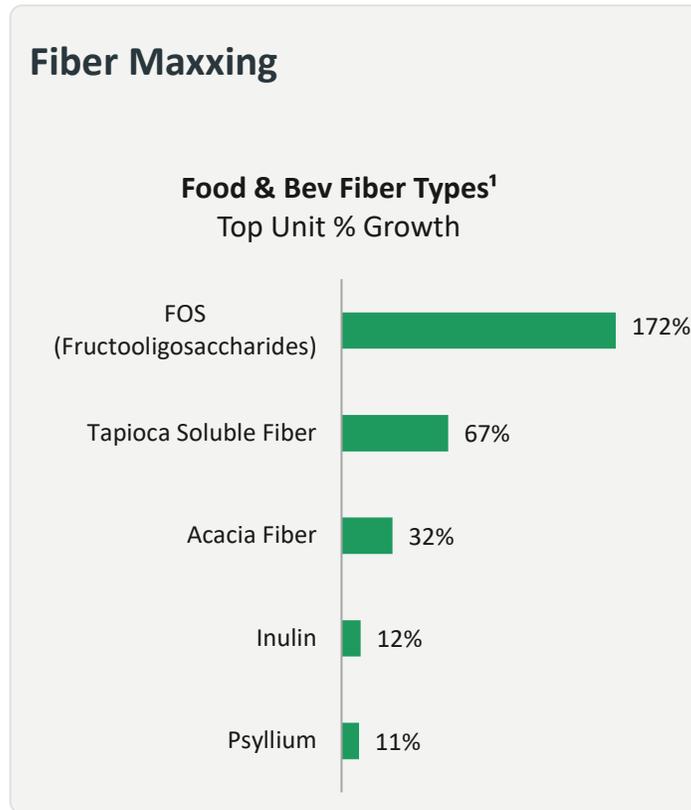
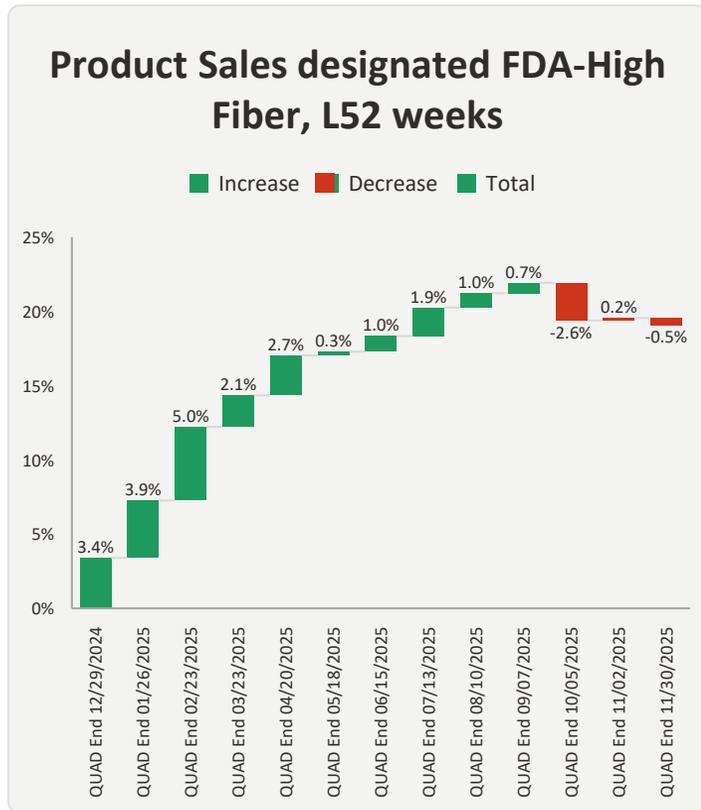


Elemental help



Is fiber the new protein?

Protein may dominate headlines, but fiber is the real gap in American diets- and brands are starting to respond



FDA-denoted High Fiber products are growing in the usual places...



708%
SUPPLEMENTS



85%
BREAKFAST FOODS

...as well as new areas of penetration



70%
RTD TEA & COFFEE



29%
SODA



Thank You!

CONTACT US AT
growth@spins.com

The State of Supplements



Tom Aarts

Founder & Managing Director
Nutrition Business Advisors



Sharon Leite

CEO
The Vitamin Shoppe



Christine Casey

Category Manager, VMS
& Nutritionals
KeHE Distributors



Scott Dicker

Sr. Director, Market Insights
SPINS

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45 YEARS Natural Products EXPO WEST®

The logo features a large '45' in a dark red color, with 'YEARS' written in a smaller font inside the '5'. To the right of the '45' is the text 'Natural Products' in a dark grey font, with a small circular sunburst icon above the word 'Natural'. Below 'Natural Products' is 'EXPO WEST' in a dark red font, followed by a registered trademark symbol (®).



By Informa Markets