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## Trends happen on Amazon ~24 months before FDM.

### Amazon is a Powerful Data Source for Trends. Why?

- ⦿
 Infinite shelf size. Includes the full range of products consumers seek
- ⦿
 Includes legacy PLUS up-and-coming digital-native brands
- ⦿
 Dominates eCommerce. Makes up ~80% of supplement sales





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Amazon's **ahead-of-the-curve insights** offer benefits for multiple CPG stakeholder groups.




Brands

Brands pinpoint white space and leverage insights for product development, marketing, assortment, and sales strategies with retailers.





Retailers

Retailers better understand consumers' shifting demand and what to place on store shelves. Though newer, it is a critical data source for category managers.



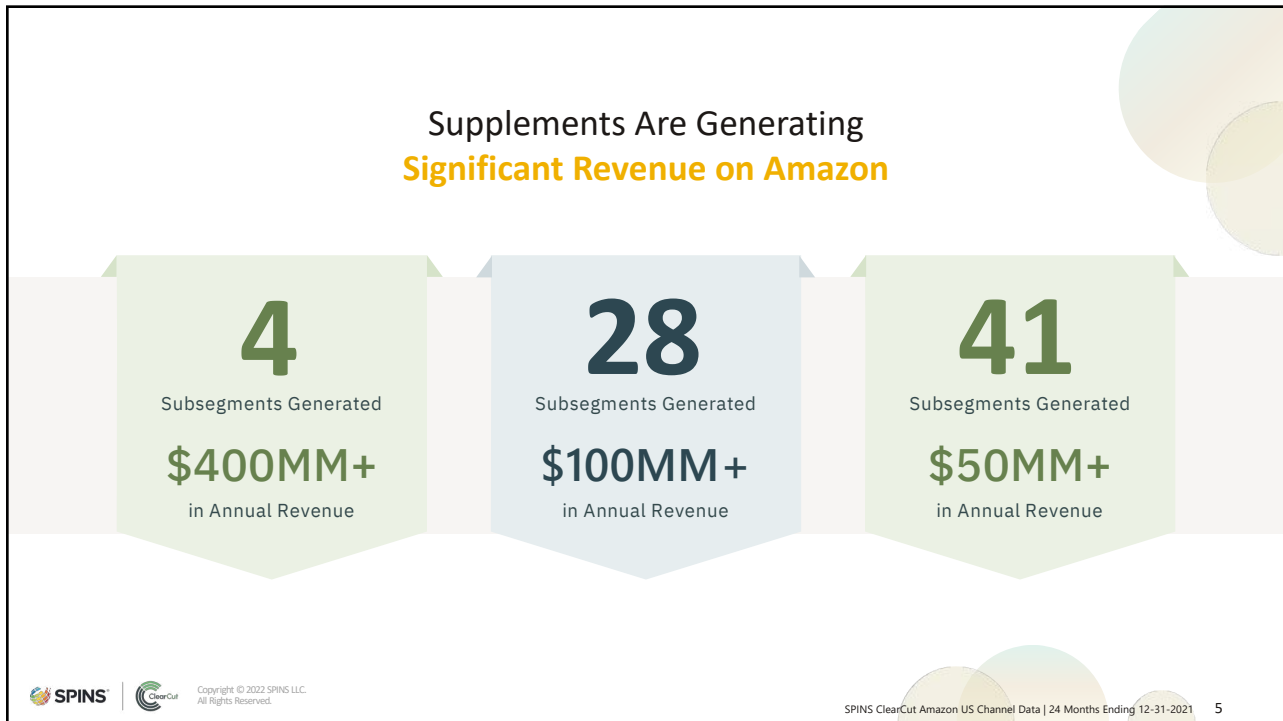
Suppliers

Suppliers can closely monitor and act on new ingredient and product trends, as well as understand how specific brands are employing raw materials.

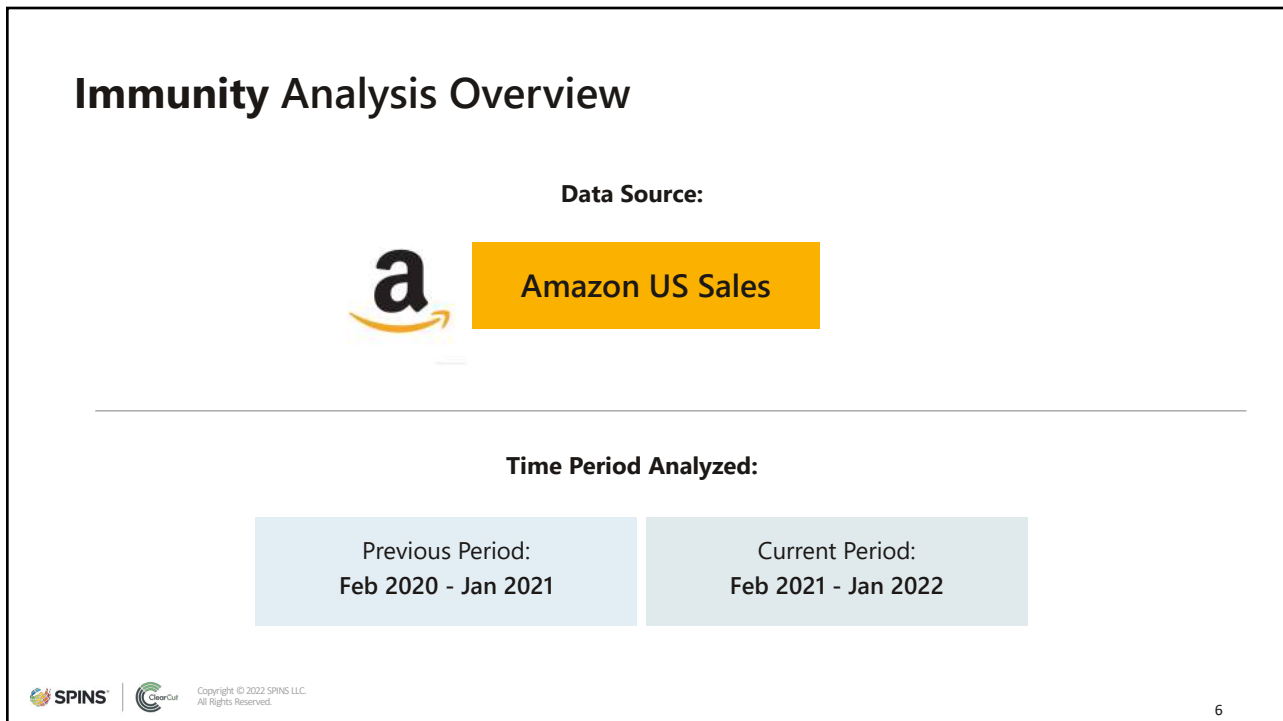



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## Vitamin D is Leading Immunity Sales on Amazon


Top Immunity Subsegments, By Annual Revenue

SUBCATEGORY	REVENUE RANK	YOY GROWTH
<b>Immunity Complex</b>	1	-7%
<b>Vitamin D</b>	2	5%
<b>Vitamin C</b>	3	-19%
<b>Elderberry</b>	4	-16%
<b>Zinc</b>	5	-4%

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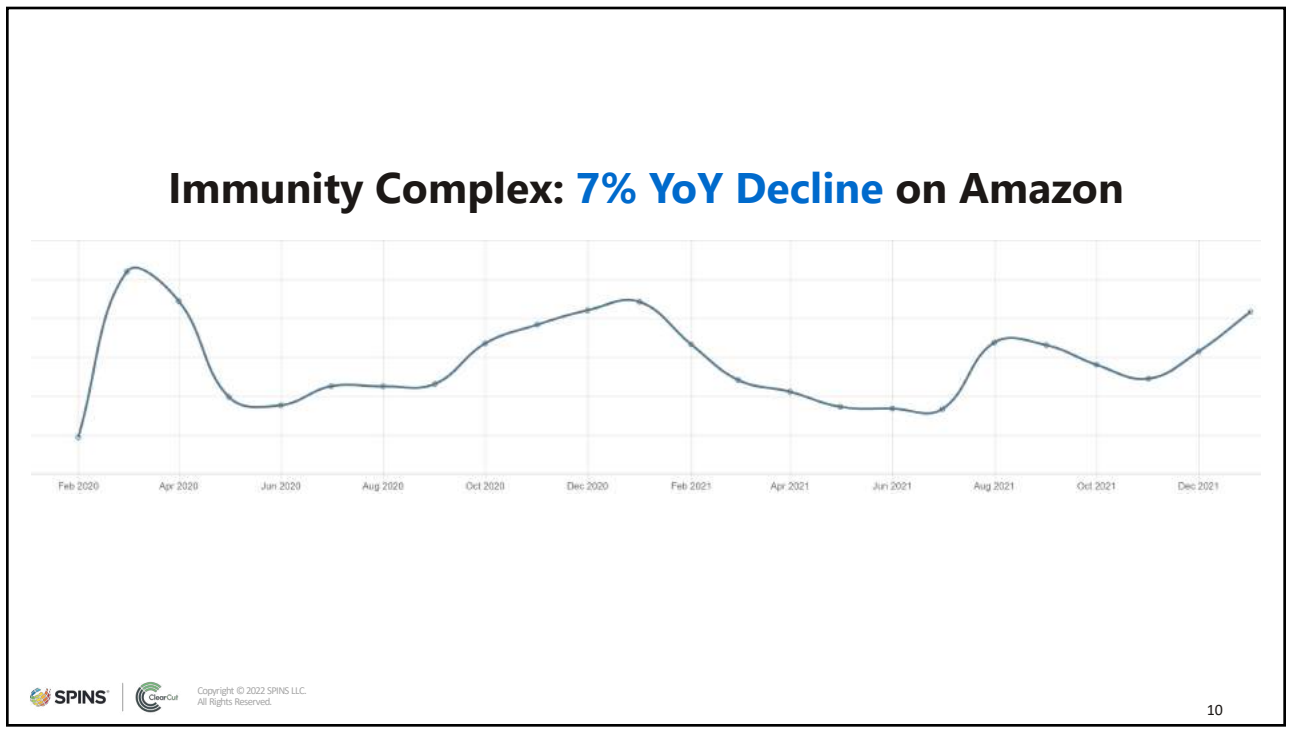
# Immunity Subcategories



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## What's Attributes Lead In Immunity Complex?


### Deep Dive into Attributes and Top Brands

DELIVERY FORM	MARKET SHARE	YOY GROWTH
<b>Capsules</b>	36%	10%
<b>Gummies</b>	30%	-10%
<b>Liquid</b>	9%	-16%
<b>Tablets</b>	9%	-15%
<b>Powder</b>	9%	-14%







### Top 5 Brands



The top product in Immunity Complex was a product with a blend of Elderberry + Zinc + Vitamin C

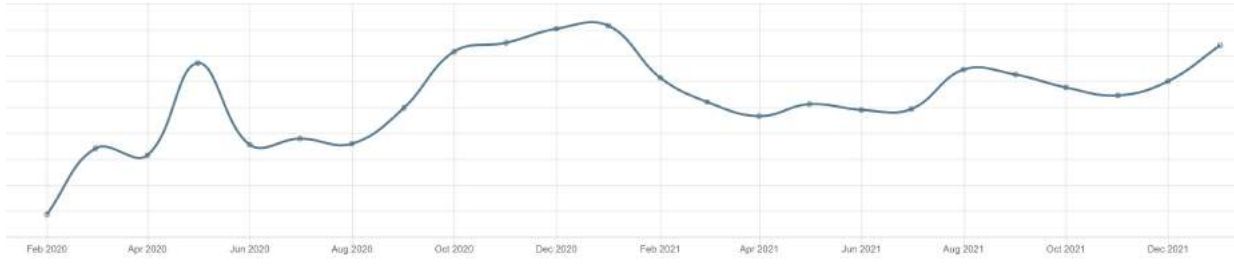
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## Vitamin D: 5% YoY Growth on Amazon

Vitamin D is Seeing Less of a Seasonal Dip in Sales following the Pandemic.



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## What's Driving Vitamin D Growth?


### Deep Dive into Attributes and Top Brands



Gummies are seeing the fastest YoY growth.

DELIVERY FORM	MARKET SHARE	YOY GROWTH
Softgels	48%	0%
Capsules	22%	22%
Liquid	13%	2%
Gummies	11%	24%
Tablets	6%	-4%

### Top 5 Brands



 Vitamin D supplements for kids grew by 20% YoY, which is faster than for adults.

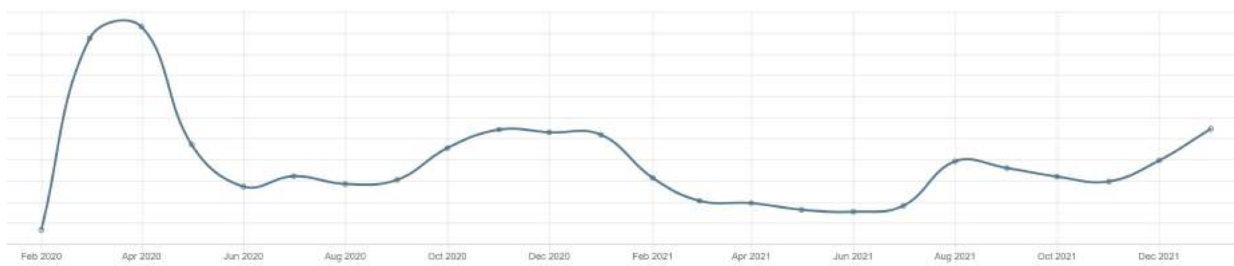
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## Vitamin C: 19% YoY Decline on Amazon

### Sales of Vitamin C Saw their Peak at the Start of the Pandemic.



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## What's Attributes Lead In Vitamin C?


### Deep Dive into Attributes and Top Brands



DELIVERY FORM	MARKET SHARE	YOY GROWTH
<b>Capsules</b>	30%	-14%
<b>Tablets</b>	19%	-22%
<b>Powder</b>	18%	-33%
<b>Gummies</b>	14%	-16%
<b>Liquid</b>	12%	-6%



**Top 5 Brands**

 The top-selling Vitamin C product's delivery form is powder - while powder as a delivery form holds just 18% of subcategory market share.

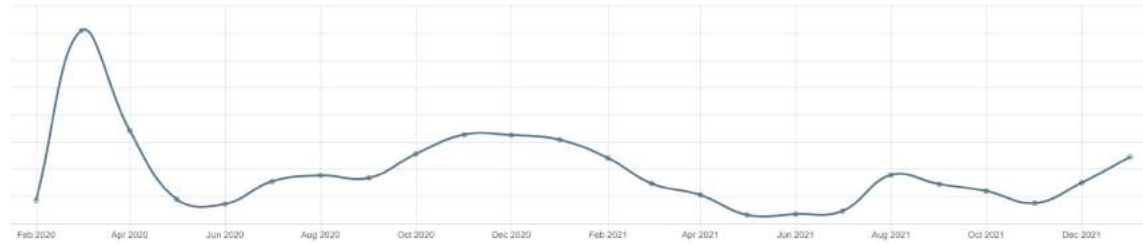





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## Elderberry: 16% YoY Decline on Amazon



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## What's Attributes Lead In Elderberry?



### Deep Dive into Attributes and Top Brands

DELIVERY FORM	MARKET SHARE	YOY GROWTH
<b>Gummies</b>	64%	-14%
<b>Capsules</b>	17%	-18%
<b>Liquid</b>	13%	-39%
<b>Lozenges</b>	1%	-38%
<b>Tablets</b>	1%	-11%



**Top 5 Brands**

Elderberry took off during the beginning of the pandemic but had a sharp decline shortly after the Spring of 2020.

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## Zinc: 4% YoY Decline on Amazon






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## What's Attributes Lead In Zinc?

### Deep Dive into Attributes and Top Brands

DELIVERY FORM	MARKET SHARE	YOY GROWTH
<b>Capsules</b>	47%	16%
<b>Tablets</b>	28%	-20%
<b>Liquid</b>	13%	-26%
<b>Gummies</b>	4%	23%
<b>Lozenges</b>	2%	-37%

#### Top 5 Brands

Gummies are the only delivery form in the top 5 with growth in the category

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## Want to Remove Your Market Blind spots?

### SPINS Omni-Intelligence

Align natural, conventional, and Amazon sales and market share data into an omnichannel view to identify growth drivers, eliminate **blind spots**, and benchmark against known, emerging, or digitally native competitors.
















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Citations and/or Notes 20

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Discover Industry-Leading Visibility into the **Vitamin & Supplement Market**

Proprietary to SPINS

<b>Vitamins &amp; Supplements</b>	  	3+ MORE
<b>Natural Grocery</b>	  	130+ MORE
<b>Regional &amp; Independent</b>	  	85+ MORE
<b>Conventional</b> <small>Powered by IRI</small>	  	80+ MORE
<b>eCommerce</b>	  	4+ MORE





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## Looking for more insights?



**Dan Harari**

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 daniel@clearcutanalytics.com

**Join My Breakout Session:**

**Leveraging Omnichannel Data for Immunity Product Innovation**

Date: March 1

Time: 1:30 PM ET

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