

**SPINS**  
Stress/Sleep supplements  
Market Trends

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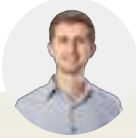
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**Meet the Presenters**



**Scott Dicker**  
Senior Market Insights Analyst  
SPINS

**Dan Harari**  
GM, Ecommerce Solutions  
SPINS

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**SPINS**

**Inspiring the pursuit of wellness.**  
SPINS is a wellness-focused CPG data company.

**SPINS equips brands** with insights and tools they need to innovate, get their products to market, and tell their stories.

**SPINS provides retailers** mission-critical capabilities to serve the consumer through tailored experiences, the right products on the shelf, and differentiated assortments.



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SPINS has the most expansive network of proprietary retailer partners.

In partnership with IRI					
Conventional					MATURE
Proprietary to SPINS					
Natural Grocery					INNOVATION
eCommerce					DIGITALLY NATIVE
Vitamins & Supplements					BREADTH & DEPTH
Neighborhood Pet					INNOVATION
Regional & Independent Grocery					LOCAL

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SPINS has the most comprehensive library of intelligent product facts

SPINS Product Intelligence spans an extensive database of over 3 million UPCs and hundreds of attributes, enabling vital sightlines and transparency into the marketplace

COLLECT	GENERATE
	<p><b>Product Facts</b> e.g. Category, Size, Brand, Company, Packaging, Form, Brand Positioning, Product Type</p> <p><b>Allergens &amp; Sensitivities</b> e.g. Major &amp; Allergen Free, Labeled Gluten Free, Labeled Grain Free, Tree Nuts, Lactose, Shellfish, Soy, Peanuts, Dairy</p> <p><b>Sustainability</b> e.g. Non-GMO Project Verified, Labeled Grass Fed, Organic, Fair Trade, Certified B-Corp, Certified Demeter Biodynamic, Labeled Animal Welfare</p> <p><b>Health &amp; Wellness</b> e.g. Labeled Sprouted, Probiotics, Functional Ingredients, Sugar Ingredients, Monk Fruit, Certified Whole Grains Council</p> <p><b>Lifestyle, Diets &amp; Tribes</b> e.g. Paleo, Vegan, Certified Paleo Keto, Raw, Plant Based</p> <p><b>Clean Label</b> e.g. No Color, No Oil, No Sugar, No Artificial Sweeteners, High Fructose Corn Syrup, MSG, Parabens Free, Aluminum Free</p>

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**Today's Topics**

- Stress and Sleep Support  
Market overview
- Importance of omnichannel sales

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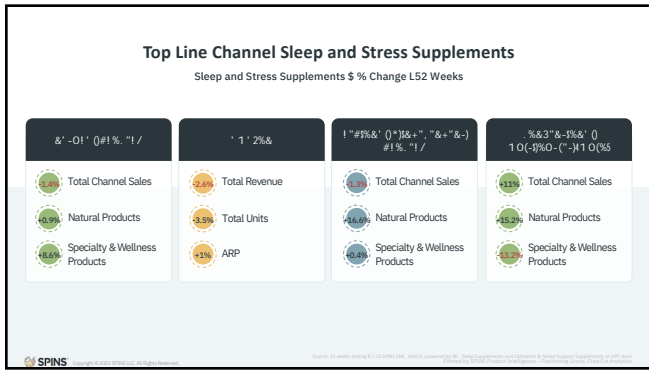
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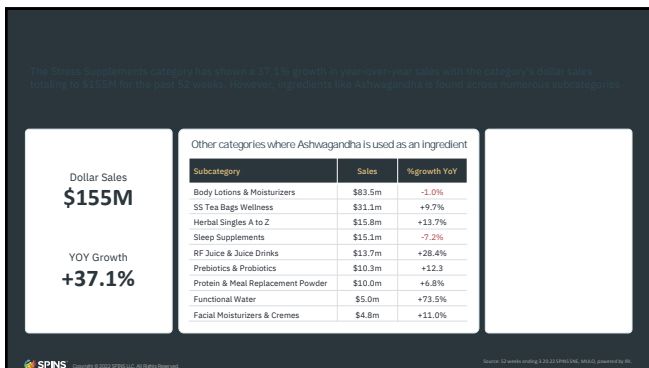
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Growing Trend:  
**Functional Products**

Consumers are gravitating towards products that are dual function, such as body wash that contains melatonin to help with falling asleep or tasty beverages that also provide stress relief

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Growing Trend:  
**Protein Powder + Stress Relief**

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**Delivery Method**

Beyond capsules, other forms of product types are gaining popularity like shots, patches, beverages and etc.

Sleep		Stress & Mood Support	
Product Type	YoY Growth	Product Type	YoY Growth
Patch	171%	Shot	519%
Gummy	28%	Soft Chew	384%
RTD Carbonated Beverage	16%	Gummy	74%
Pellet	8.2%	RTD Carbonated Beverage	70%
Vegetable Capsule	2.6%	RTD Liquid	32%

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Key Trend:  
**Shots**



SLEEP



DESTRESS

Wellness shots have gained popularity over the years, and consumers have particularly shown interest in Stress & Mood Support shots. With ingredients like Ashwagandha, Passionflower and etc., consumers can quickly get their dose of adaptogens paired with interesting flavors

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Growing Trend:  
**Patches**



SLEEP



DESTRESS

When it comes to products that help with sleep, consumers are choosing to try patches. These patches are typically used on the arm or wrist and left overnight. Similarly for stress relief, these patches claim to help calm people down throughout its application.

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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 over 70% of most CPG category sales.

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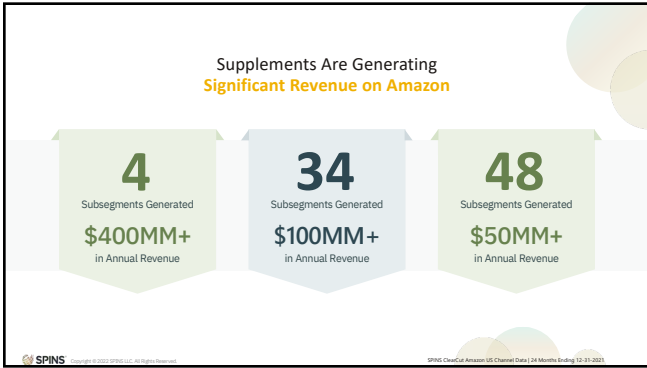
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Amazon data is a brand's crystal ball into what's next for CPG, powering better decision-making.

- Pinpoint high-growth categories with limited competition & capitalize on white space early
- Optimize product development strategies with trending attributes and need states.
- Enhance go-to-market strategies (e.g., pricing, packaging, assortment, etc.).

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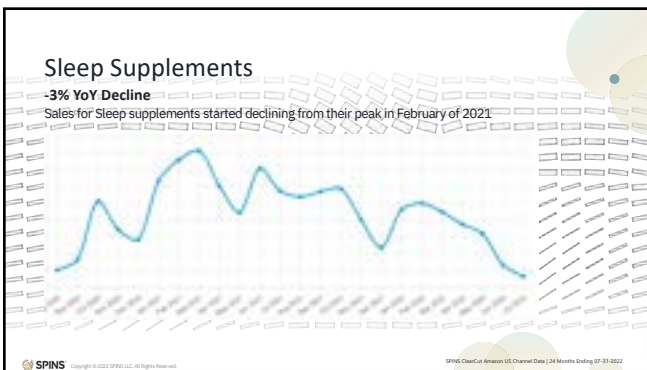
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### The Top 5 Sleep Supplements

	TITLE	Avg Price	Market Share	Count	Delivery Form
1	Relaxum Natural Sleep Aid   Magnesium, Melatonin, GABA, Chamomile, & Valerian (60 Vegan Capsules, 30 Day Supply)	\$33.01	3.9%	60	Veg Caps
2	Natrol Melatonin Fast Dissolve Tablets, Strawberry Flavor, 10mg, 100Count	\$11.74	2.6%	100	Tablets
3	Carlyle Melatonin 12 mg Fast Dissolve 180 Tablets   Drug Free   Natural Berry Flavor   Vegetarian, Non-GMO, Gluten Free	\$9.50	2.6%	180	Tablets
4	VitalKusion Max Strength Melatonin Gummy, Strawberry, 100 Count	\$10.89	2.2%	100	Gummy
5	Integrative Therapeutics Cortisol Manager - with Ashwagandha, L-Theanine - Reduces Stress to Support Restful Sleep - Supports Adrenal Health - 90 Count	\$67.02	2.2%	90	Tablet

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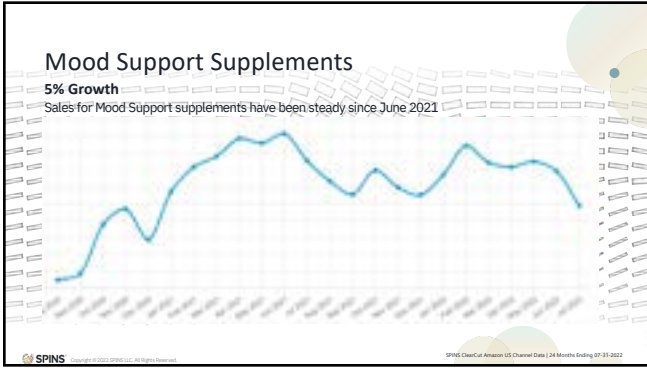
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### The Top 5 Mood Support Products

	TITLE	AVG PRICE	MARKET SHARE	COUNT	DELIVERY FORM
1	SiriL Ashwagandha Capsules - Equivalent to 5200mg Powder - Combined With Turmeric, Ginger, Black Pepper And Rhodiola - Mood And Strength Support Supplement - 1 Pack 90 Capsules 3-Month Supply	\$12.92	14.6%	90	Capsules
2	Integrative Therapeutics Cortisol Manager - with Ashwagandha, L-Theanine - Reduces Stress to Support Restful Sleep - Supports Adrenal Health* - 30 Count	\$25.19	13.3%	30	Tablets
3	LES Labs Cortisol Health - Stress Relief, Healthy Adrenals, Balanced Cortisol Response & Relaxation - Phosphatidylserine, Magnolia Bark, Rhodiola, Rosea & Ashwagandha - 60 Capsules	\$30.22	13.3%	60	Capsules
4	Organic Ashwagandha - Garden of Life myKind Organics - Vegan, Gluten Free, Non-GMO - 2-Month Supply, 60 Tablets	\$19.35	11.0%	60	Tablets
5	Gaia Herbs Adrenal Health Daily Support - with Ashwagandha, Holy Basil & Schisandra - 120 Liquid Phyto-Capsules (60-Day Supply)	\$39.38	7.5%	120	Veg Caps

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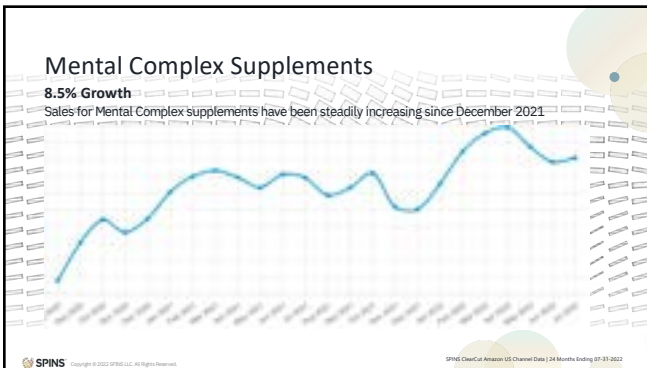
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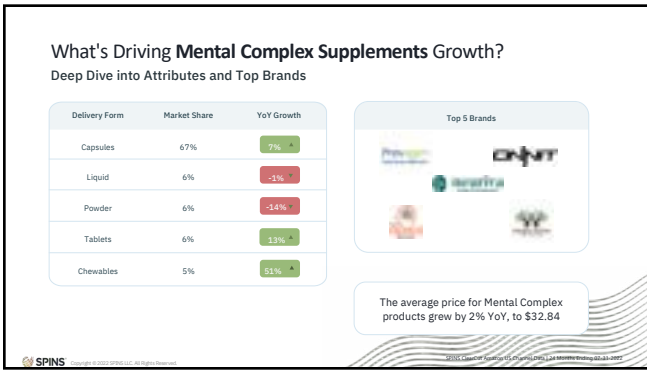
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### The Top 5 Mental Complex Products

	TITLE	AVG PRICE	MARKET SHARE	COUNT	DELIVERY FORM
1	ONIT Alpha Brain Premium Nootropic Brain Supplement, 90 Count, for Men & Women - Caffeine-Free Focus Capsules for Concentration, Brain & Memory Support - Brain Booster Cat's Claw, Biotin, Citicoline	\$79.63	4.7%	90	Capsules
2	NEURIVA Plus Brain Supplement for Memory, Focus & Concentration + Cognitive Function with Vitamin B6 & B12 and Clinically Tested Nootropic Phosphatidylserine and Neurofactor, 300 Capsules	\$33.85	3.9%	30	Capsules
3	ONIT Alpha Brain Premium Nootropic Brain Supplement, 90 Count, for Men & Women - Caffeine-Free Focus Capsules for Concentration, Brain & Memory Support - Brain Booster Cat's Claw, Biotin, Citicoline	\$34.86	3.4%	30	Capsules
4	Life Extension Neuro-Mag Magnesium-L-Threonate, 90 Vegetarian Capsules Ultra-Absorbable Magnesium - Memory, Focus & Overall Cognitive Performance Boost - Non-GMO, Gluten-Free	\$27.22	2.2%	90	Veg Caps
5	Magnesium L-Threonate Capsules (Original Magnesium Formula - Patented and Clinically Studied) - High Absorption - Bioavailable Form for Cognitive Function and Sleep Support - 2,000 mg - 100 Capsules	\$29.93	2.0%	100	Capsules

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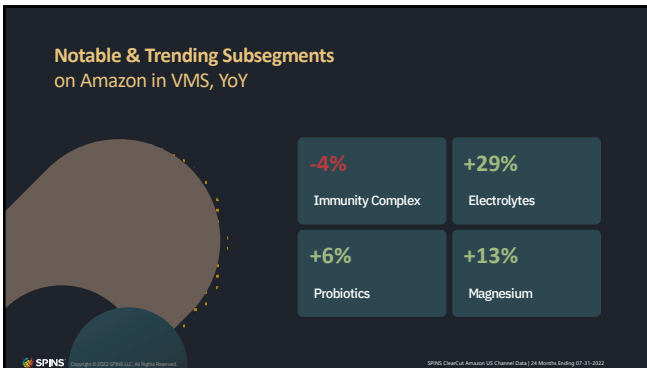
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Inspiring  
the pursuit of  
**wellness.**

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**Interested in learning more?**  
We'd love to hear from you:  
sdicker@spins.com | Daniel@spins.com.

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