



Expanding Health-Span: Market Trends



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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

Product Facts
 E.g. Category, Size, Brand, Company, Packaging Form, Brand Positioning, Product Type

Allergens & Sensitivities
 E.g. Major & Allergen Free, Labeled Gluten Free, Tree Nuts, Lactose, Cholesterol, Soy, Protein, Dairy

Sustainability
 E.g. Non-GMO/Not Genetically Modified, Labeled Grass Fed, Organic, Fair Trade, Certified B-Corp, Certified Demeter Biodynamic, Labeled Animal Welfare

Health & Wellness
 E.g. Labeled Sprouted, Probiotics, Functional Ingredient, Sugar Ingredients, Monk Fruit, Certified Whole Grain Council

Lifestyle, Diets & Tribes
 E.g. Paleo, Vegan, Low-Carb/Paleo Keto, Raw, Plant Based

Clean Label
 E.g. No Artificial Flavors, No Artificial Sweeteners, High Fructose Corn Syrup, MSG, Parabens Free, Aluminum Free

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Lifespan to Health Span
 Individuals are redefining daily routines and consumption rituals to increase physical longevity and decrease the rate of aging

Revolution of the Practitioner Approach

- Podcasts and social influencers are sharing medical knowledge that was previously controlled by the traditional medical community, and building trust with scientific proof points and expert perspectives
- Scientific and medical knowledge is being repurposed and repackaged to solve for what consumers are looking for: increased physicality, improved outward appearance and sustained mental acuity

Incorporation of Incremental Elements

- Consumers are using physical and food interventions, such as cold plunges and red light meals, to change the physical state of the body, increase cell resilience, improving ability to sleep and accelerating regenerative processes
- In-home versions of more affordable price points of these technologies and tools are enabling full routine incorporation rather than being sporadic indulgences

Practical Prevention For Long Game Living

- Complete re-evaluation is occurring across food and beverage groups as people critically think about its effect on their overall wellbeing
- The connection between chemical ingestion and likelihood of disease continues to drive reformulation
- Recognition of the importance of social interactions for holistic health in an age of digital connection is giving way to a desire to more meaningful connections and less "screen time"

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PRODUCT INTELLIGENCE INNOVATION INSIGHTS

Sports Nutrition to Active Lifestyle Nutrition
 Expanded Market to Women, Gen X, and Boomers

<p>118 35-44yo Females</p>		<p>124 35-44yo Males</p>	<p>135 45-54yo Males</p>
<p>122 45-54yo Females</p>	<p>107 55-64yo Females</p>	<p>119 55-64yo Males</p>	

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What's driving Active Aging Nutrition sales?



Sports Nutrition has become Active Lifestyle Nutrition

- Used to only be for body builders and competitive athletes
- Looking to stay active later into life
- Blending of Sport and Wellness consumer into Active Lifestyle nutrition+



Health-Conscious Consumers

- Pandemic accelerated preventative health purchasing
- Getting active, staying active for overall health at every age bracket
- Greater awareness of the benefits of protein
- Not just limited to physical activity
 - Mental, Sleep, Mood, Joints



Lifestyle Factors

- Greater access – Fastest growing online shopping group.
- Greater availability in traditional channels
- Spread across many categories (Functional food products)

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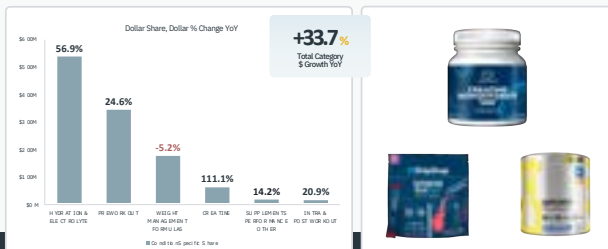
The Evolution of Protein Powder



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Performance Nutrition category growth driven by Hydration + Electrolyte, Pre-workout, and Creatine products

Performance Nutrition Subcategory Growth



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Sleep Supplements


The Sleep Supplements category has shown a -8.2% decrease in year-over-year sales with the category's dollar sales totaling to \$690M for the past 52 weeks. However, ingredients like melatonin is also showing growth in other subcategories.

Dollar Sales
\$690M

YOY Growth
-8.2%

Other categories where Melatonin is used as an ingredient

Subcategory	Sales	%growth YoY
Bubble Bath & Bath Preparations	\$23.0m	+7.3%
Body Wash	\$10.1m	+17.8%
Body Lotions & Moisturizers	\$9.0m	-20.9%
SS Tea Bags Wellness	\$3.6m	+53.4%
Functional Beverage - Other	\$1.7m	-42.6%
Facial Moisturizers & Cremes	\$1.0m	+8.7%
Facial Serums & Masks & Treatments	\$317k	+0%
Facial Cleansers & Exfoliants	\$187k	-81.8%
Pet Vitamins & Supplements	\$123k	+12.2%



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Stress Supplements


The Stress Supplements category has shown a -5.6% decrease in year-over-year sales with the category's dollar sales totaling to \$141M for the past 52 weeks. However, ingredients like Ashwagandha is found across numerous subcategories

Dollar Sales
\$141M

YOY Growth
-5.6%

Other categories where Ashwagandha is used as an ingredient

Subcategory	Sales	%growth YoY
Body Lotions & Moisturizers	\$33.8m	+7.8%
SS Tea Bags Wellness	\$20.8m	+15.0%
RF Juice & Juice Drinks	\$17.7m	+22.8%
Water Sparkling Flavored	\$5.8m	+118.9%
Facial Moisturizers & Cremes	\$3.8m	-21.1%
Wellness Shots	\$3.5m	+85.0%
SS Coffee RTD	\$2.3m	+38.8%
Bars Wellness	\$2.2m	-20.5%
SS Coffee Beans & Grounds	\$2.1m	+16.4%



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Joint Supplements


The Joint Supplements category has seen a -3.6% growth in year-over-year sales with the category's dollar sales totaling to \$296M for the past 52 weeks.

Dollar Sales
\$296M

YOY Growth
-3.6%

Other categories where Joint Health is a health focus

Subcategory	Sales	%growth YoY
Protein & Meal Replacement Powder	\$3.1m	-8.6%
Herbal Singles A to Z	\$1.9m	-0.5%
Marine EFAs & Other	\$1.7m	+55.8%
Homeopathic Medicine Singles	\$580k	+4.6%
Condition Specific Suppl. Other	\$464k	-
Superfruit & Juice Concentrates	\$319k	-0.1%
Minerals	\$121k	+29.0%
CBD & Other Therapeutic Oils	\$115k	-30.0%
Specialty Supplements Other	\$73k	-32.2%



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Bone Supplements

The Bone Supplements category has seen a -1.6% decline in year-over-year sales with the category's dollar sales totaling to \$300M for the past 52 weeks.

Dollar Sales
\$300M

YOY Growth
-1.6%

Other categories where Bone Health is a health focus

Subcategory	Sales	%growth YoY
Vitamin A & D & K	\$126.7m	-7.6%
Minerals	\$40.5m	+41.4%
Multivitamins	\$38.4m	+38.4%
Children's Supplements	\$12.3m	+12.3%
Superfruit & Juice Concentrates	\$1.3m	+1.3%
Marine EFAs & Other	\$302k	+5.5%
Homeopathic Medicine Singles	\$194k	-21.5%
Protein & Meal Replacement Liquid	\$8k	+186.4%
Vitamin C	\$7k	-28.1%

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Brain Supplements

The Brain Supplements category has seen a -8.3% decline in year-over-year sales with the category's dollar sales totaling to \$316M for the past 52 weeks. Consumers seem to be moving towards beverages that help with focus and memory instead

Dollar Sales
\$316M

YOY Growth
-8.3%

Other categories where Cognitive Health is a health focus

Subcategory	Sales	%growth YoY
Water - Flavored, Non-carbonated	\$28.0m	+0.8%
Herbal Singles A to Z	\$16.0m	+12.4%
Kombucha	\$19.5m	+12.0%
Multivitamins	\$10.0m	-2.3%
Wellness Shots	\$6.1m	+178.5%
Vitamin B	\$5.2m	+77.9%
Condition Specific Suppl. Other	\$5.1m	-9.7%
Marine EFAs & Other	\$4.1m	+9.3%
Minerals	\$3.8m	+58.2%

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Trends to watch out for: From Gain to Retain: HMB, Creatine & Protein

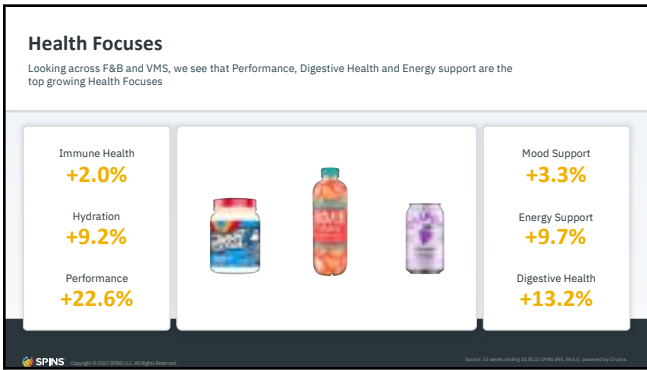
HMB

Creatine

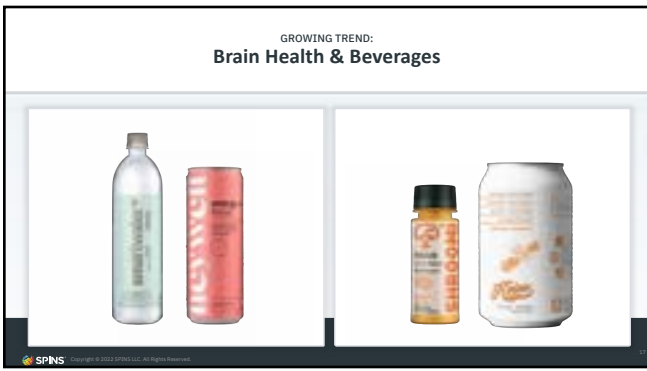
Protein

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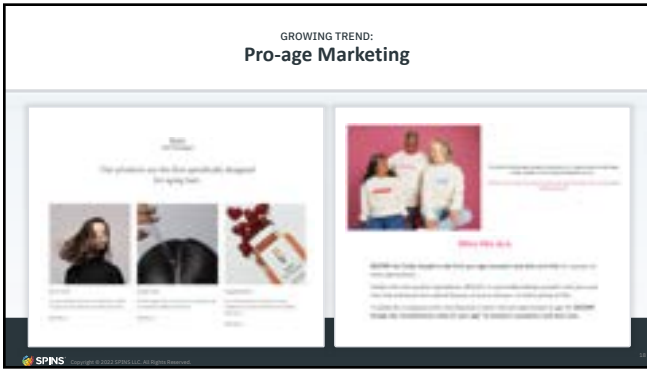
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GROWING TREND:
Protein Powder + Stress Relief

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Thank you!

For more information, **connect with your SPINS Representative.**
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