



Microbiome Market Trends

Naturally Informed
Microbiome: Mastering The Market



Meet Your Presenter

Brandon Casteel

Vice President of Partnerships
SPINS, bcasteel@spins.com




For over 20 years, SPINS has been the leader in CPG data and applications for the Natural Products Industry.

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

Identify Attributes Driving Performance

SPINS product library is the common language for the Natural Products Industry
Stop by the SPINS booth at the tabletop show for a live demo on Friday

COLLECT



GENERATE

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

Allergens & Sensitivities
e.g. Major 8 Allergen Free, Labeled Gluten Free, Labeled Grain Free, Tree Nuts, Lactose, Shellfish, Soy, Peanuts, Dairy, Thickeners and Stabilizers

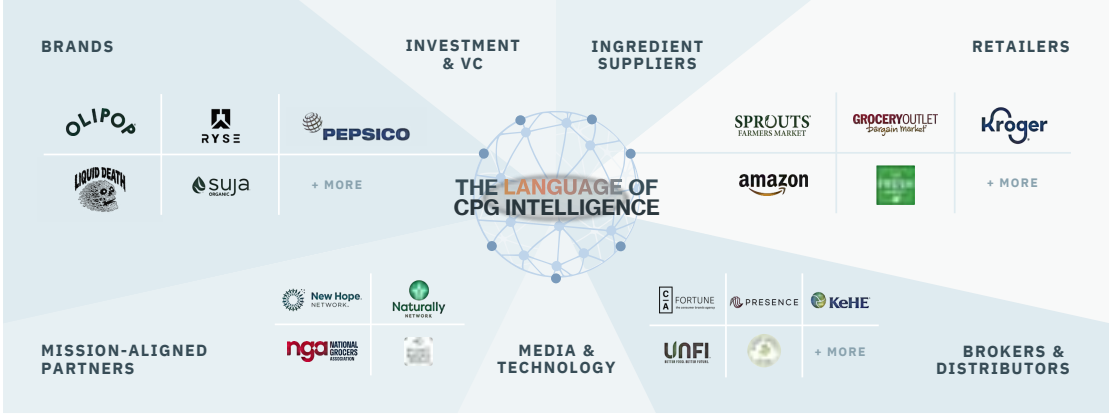
Sustainability
e.g. Non-GMO Project Verified, Labeled Grass Fed, Organic, Fair Trade, Certified B-Corp, Certified Glyphosate Residue Free

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

Lifestyle, Diets & Tribes
e.g. Paleo, Vegan, Fodmap, Keto, Vegetarian

Clean Label
e.g. Yellow No. 5, Nitrates, Artificial Sweeteners, High Fructose Corn Syrup, MSG, Paraben Free, Aluminum Free

We empower the community to interact and transact with **efficiency, transparency, and trust.**



CHANNEL PERFORMANCE



Top Line **Prebiotics & Probiotics Supplements**

\$ % Change L52 Weeks

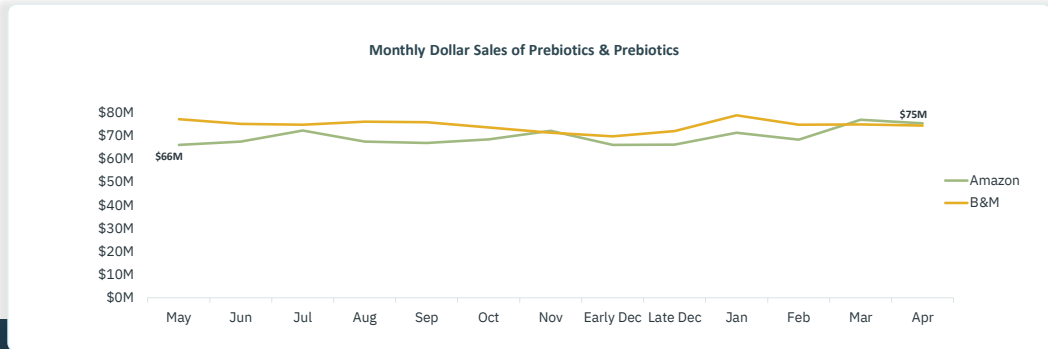
NATURAL GROCERY	CONVENTIONAL MULTI OUTLET (MULO)	REGIONAL & INDEPENDENT GROCERY	AMAZON
-7.8% Total Channel Sales	-4.5% Total Channel Sales	-4.3% Total Channel Sales	+28.2% Total Channel Sales
-10.3% Total Units	-7.5% Total Units	-9.6% Total Units	+25.2% Total Units
+2.8% ARP	+3.2% ARP	+5.9% ARP	+2.4% ARP

MONTHLY PERFORMANCE



Sales of Prebiotics & Probiotics in B&M Declining?

Amazon beat B&M in monthly sales of Prebiotics & Probiotics for the month of April 2024



YEARLY PERFORMANCE



Sales of Prebiotics & Probiotics in B&M Declining?





Prebiotics & Probiotics Performance in VMS

Brick & Mortar

Subcategory	Sales Rank	YoY Growth
Protein & Meal Rep. (Liquid)	1	+12%
Multivitamins	2	+1%
Protein & Meal Rep. (Powder)	3	+5%
Prebiotics & Probiotics	4	-4%
Children Supplements	5	-10%

Amazon

Subcategory	Sales Rank	YoY Growth
Protein & Meal Rep. (Powder)	1	+11%
Prebiotics & Probiotics	2	+25%
Multivitamins	3	+28%
Minerals	4	+38%
Hydration & Electrolyte	5	+47%



Prebiotics & Probiotics – Top Delivery Forms

Brick & Mortar

Delivery Form	Rank	YoY Growth
Capsule	36%	-6%
Veg. Capsule	24%	-6%
Gummy	16%	-2%
Liquid	1%	+5%
Tablet	1%	-14%

Amazon

Delivery Form	Market Share	YoY Growth
Veg. Capsule	51%	+36%
Capsule	35%	+23%
Gummy	5%	+20%
Powder	3%	+11%
Tablet	2%	12%

ARP: +3% YoY, to \$20.25.

ARP: +2% YoY, to \$28.85.

TYPES OF DELIVERY FORMS



Delivery Forms

Different consumers have different preferences when it comes to delivery forms. Gummies are a delivery form that's growing in both Brick & Mortar and on Amazon



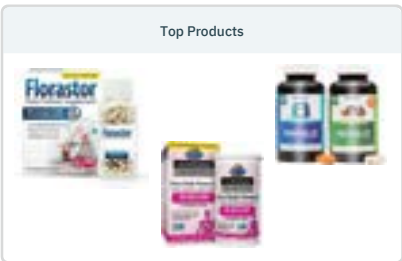
PILL COUNT ON AMAZON



What Attributes & Brands Lead Probiotics & Prebiotics

Market Share by Pill Count on Amazon

Pill Count	Market Share	YoY Growth
30	42%	31% ▲
60	31%	31% ▲
90	4%	34% ▲
100	3%	22% ▲
120	3%	18% ▲



90 Pill Count products are seeing significant growth in year-over-year sales



GutTok – Gut Health Remains Popular on Social Media

Gut Health on Social Media

PROBIOTICS

Google Search: 2.2M avg monthly searches

TikTok: 22.4M avg weekly views, +510.6% increase

Topics Driving Growth in YoY Avg Search Vol.

Yeast Infections: +356.4%

Gut Health: +12.2%

Diarrhea: +9.1%

Popular Topics



Supplement Recommendations



Food For Good Gut Health



Probiotics & Feminine Health



Fermentation – Fermented Veg. Gaining Attention

FERMENTED GARLIC IN HONEY



FERMENTED PEPPER SAUCE



KIMCHI



SAUERKRAUT



FUFU





Colostrum – ‘Liquid Gold’

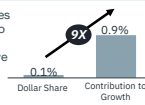
TikTok influencers are turning to **Colostrum**, available in both powder and pill form, for a **variety of health claims** like gut health, increased immunity, and concentrated levels of protein and micro-nutrients.



What is it?

Colostrum, also known as “**liquid gold**”, is the first milk produced by a mammal after birth and is a rich natural source of macro- and micro-nutrients, immunoglobulins, and peptides with anti-microbial activity and growth factors. Most of the colostrum on the market today for human consumption is sourced from cows.

Colostrum contributes **9X its dollar share** to the growth of the Probiotics & Digestive Aids category

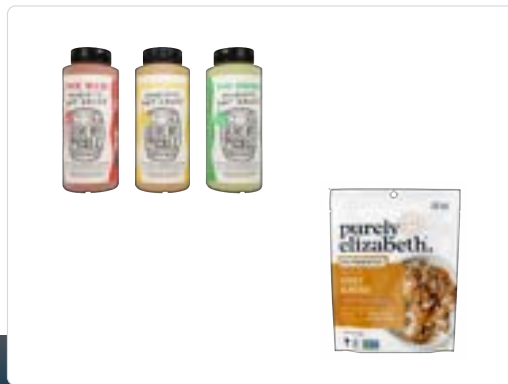
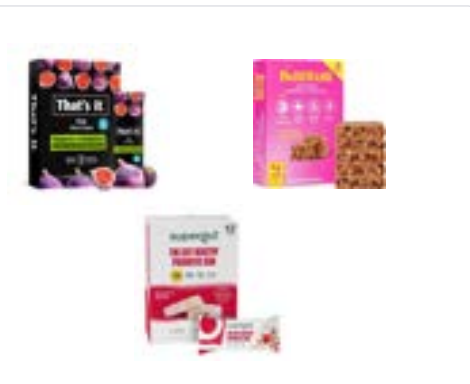


Benefits of Colostrum

Colostrum is good for **maintaining health** and **preventing disease**. It has many incredible benefits for supporting healthy skin, brain health, and even improving immunity after strenuous exercise. The peptides found in colostrum help regulate your immune system and have natural antibacterial and anti-inflammatory properties. The growth factors can help **repair the thin lining of your gut**; this is important because there are lots of foods and environmental toxins which can destroy or damage the lining that prevents undigested food from getting into your bloodstream.



Biotics – What other subcategories can it be found in?



Probiotics gain traction as tool to improve microbiomes and in turn combat allergies early

Probiotics For The Potential Prevention And Treatment Of Food Allergies

The use of prenatal and infant probiotics to prevent food allergies is an area of ongoing research. More and more studies have shown that the gut microbiota plays an important role in the susceptibility to food allergies.

Probiotics, which are beneficial bacteria, are believed to play a role in supporting a healthy gut microbiome. **A balanced microbiome might potentially reduce the risk of developing allergies by modulating the immune system.**

Other interventions including supplements with **vitamin D** and **omega 3s** are also being studied along with probiotics as possible preventative measures, but further research is still needed as the evidence is not yet definitive.

Pre-Natal & Infant / Toddler Probiotics Are Growing

Prenatal Probiotics



Garden Of Life
Prenatal & Postnatal Probiotics

Baby / Toddler Probiotics



Mommy's Bliss
Baby Probiotic Drops

The Evolution of Soda

WE ARE CURRENTLY IN WAVES 3 & 4



Wave 1
Soda for the masses. Taste and satisfaction drive consumers to purchase.

Regular Soda Category

+5%



Wave 2
Demand emerges for products with the same satisfaction as soda without the sugar and calories.

Diet & Alt Sweetened Soda

+11%



Wave 3
Better for you soda aims to deliver satisfaction without controversial sweeteners.

Natural Sodas

+5%



Wave 4
Consumers want great taste, innovation, and functional benefits in their soda.

Digestive Health Sodas

+174%

\$ % chg, YAGO

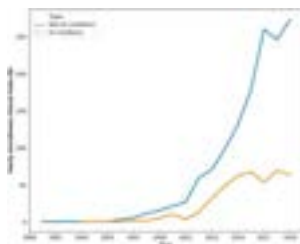
REFRIGERATED KOMBUCHA



RESEARCH STUDIES

Beyond Digestive Health – The gut microbiome’s influence on health

S3207 Time Trends in Gut Microbiome Clinical Trials in Gastroenterology



Overall, 2048 microbiome clinical trials were retrieved. Of these trials, 491/2048 (24.0%) investigated GI diseases and conditions and 1557/2048 (76%) were non-GI conditions

The American Journal of Gastroenterology 117(p. S1681-S1682, October 2020)

Microbe boosts metabolic health

According to a clinical trial, a daily dose of the bacterium *Akkermansia muciniphila* might treat metabolic syndrome – a condition that predisposes individuals to type 2 diabetes and serious cardiovascular disease, and that is marked by obesity, high blood pressure, and raised levels of blood sugar, fats and cholesterol.

Nature Med 25: 1006-1013 (2019)

The gut's link to mental health

A study of a pair of 1,000-strong cohorts has strengthened the link between the community of microorganisms that live in the gut and mental health.

Nature Microbiol 4: 623-632 (2019)



Thank you!

For more information, contact
bcasteel@spins.com
