



+



The Growth of Calm:

Exploring Market Trends and
Ingredients in Stress, Sleep,
and Mood Supplements



Meet Your Presenter

Brandon Casteel

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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

SPINS ATTRIBUTES

Attribute prevalence and trend codifies each category to unlock unparalleled depth of insights from ingredient facts and allergens to cleanliness and diets

COLLECT

GENERATE



Certifications

Consumer Facts

Servings

Ingredients & Servings

Manufacturer Info



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

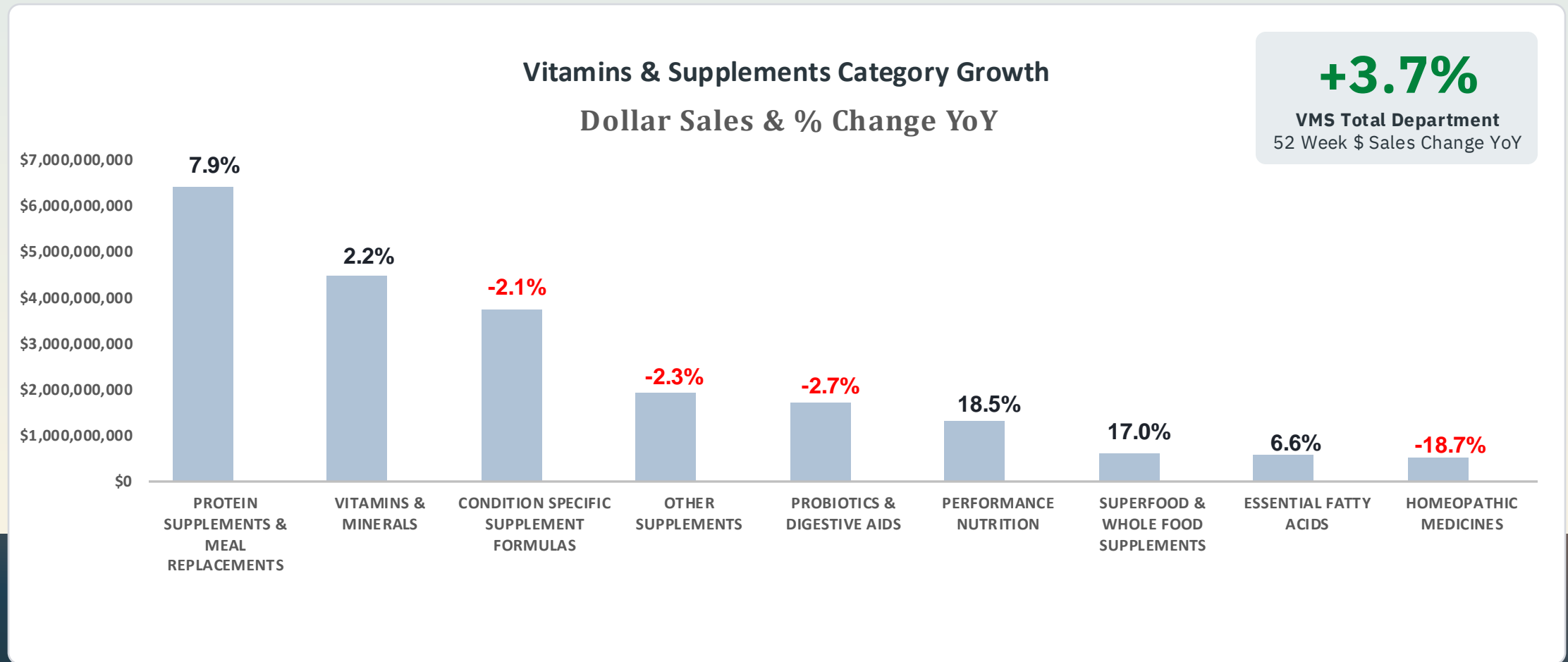
e.g. Paleo, Vegan, Fodmap, Keto, Vegetarian

Clean Label

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

Mixed Vitamins & Supplements Category Growth in 2024

Performance Nutrition & Superfood Categories are driving **double-digit growth** in the VMS space.

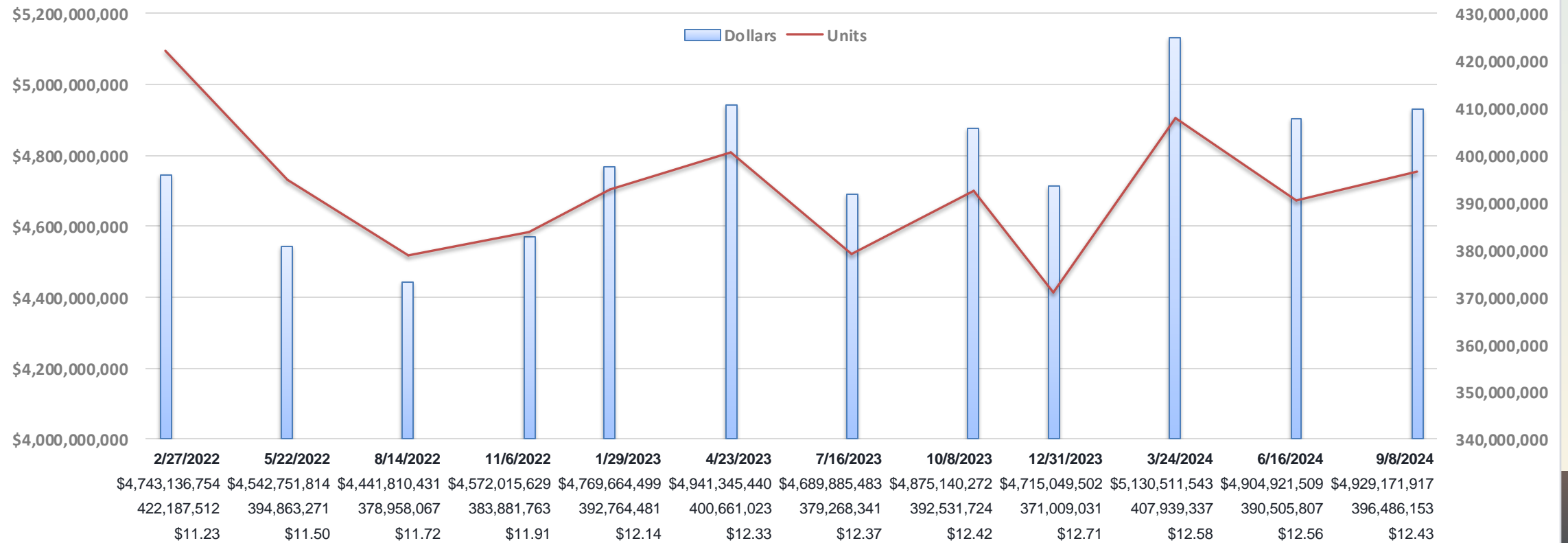


* % Represents % Change YoY (vs same time LY)

Vitamins & Supplements Effects of Increase/Decrease in Retail Price

Examining consecutive quarters, we see the historical relationship between retail, unit and dollar sales. Over this period, **average retail prices increased +11% while unit sales decreased -6%** and dollars sales increased a modest +4%.

Dollar & Unit Sales Trends with APR



Wellness and Performance Through Functional Ingredients

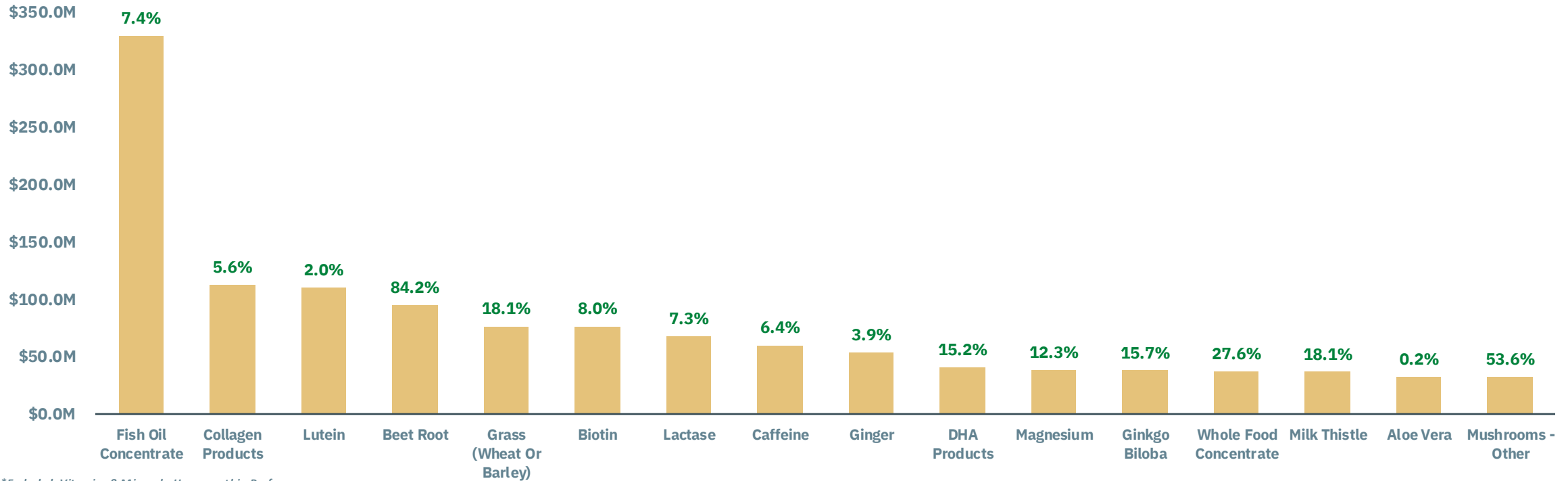


There is continued growing popularity in functional ingredients targeted towards health benefits ranging from cardiovascular & brain/memory health, digestive aids, and energy support.

Top 15 Functional Ingredients
Reporting Growth in Latest 52 weeks

Condition Specific, EFA's, Probiotic + Digestive Aids, Super & Whole Food, Other Supplements Categories by Functional Ingredient

Dollar Sales, Dol % Chg



*Excluded: Vitamins & Minerals, Homeopathic, Performance Nutrition, and Protein Supplements Categories

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

Source: SPINS Natural Channel + Multi-Outlet (MULO) (Powered by Circana)
Dept: Vitamins & Supplements, Attribute: Functional Ingredients
52 Weeks Ending 6/16/24

Women's Health: Trends & Priorities In VMS



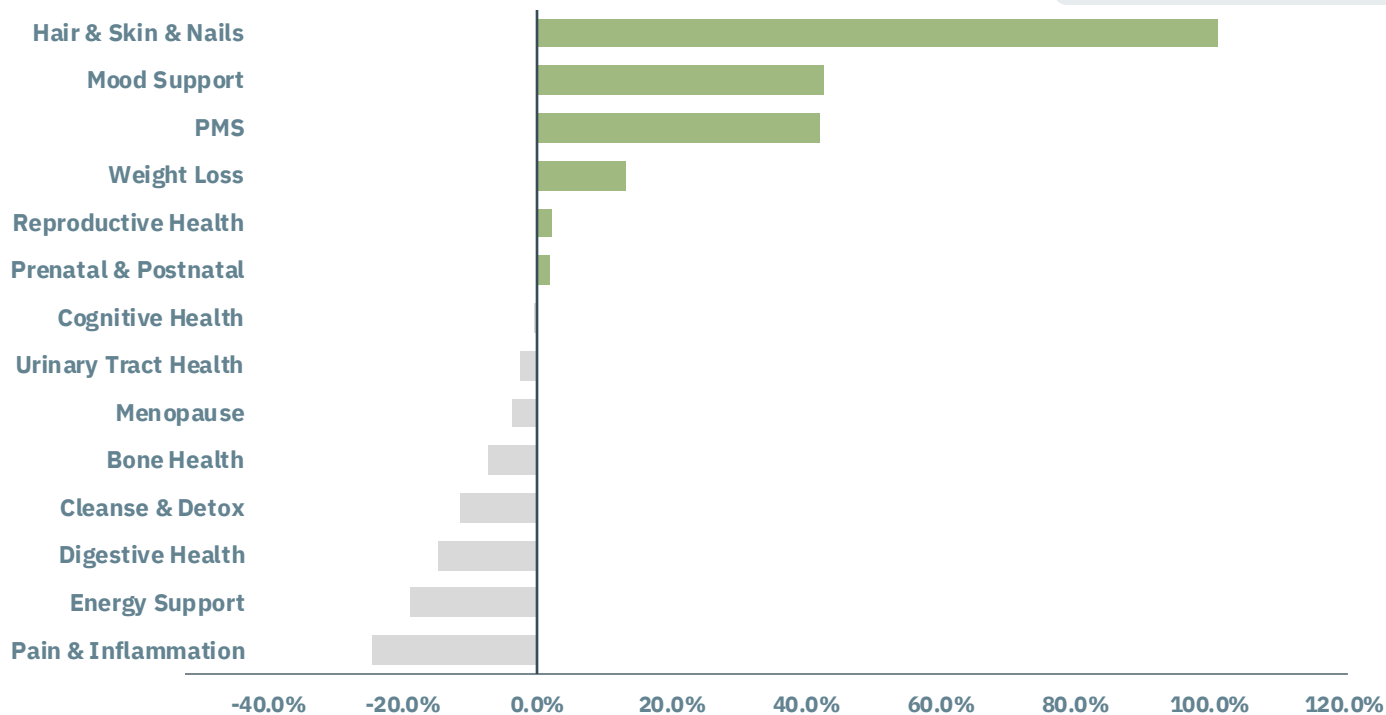
Despite an overall market decline, Women's health supplements are seeing strong growth in key areas including beauty, mood support, premenstrual syndrome, and weight loss.

Gender: Women's Only By Health Focus

Dollar Sales, Dol % Chg

-1.2%

Women Specific Supplements
52 Week \$ Sales Change YoY



Women's Specific Health Focus'



Hair & Skin & Nails



Mood Support



Premenstrual Syndrome

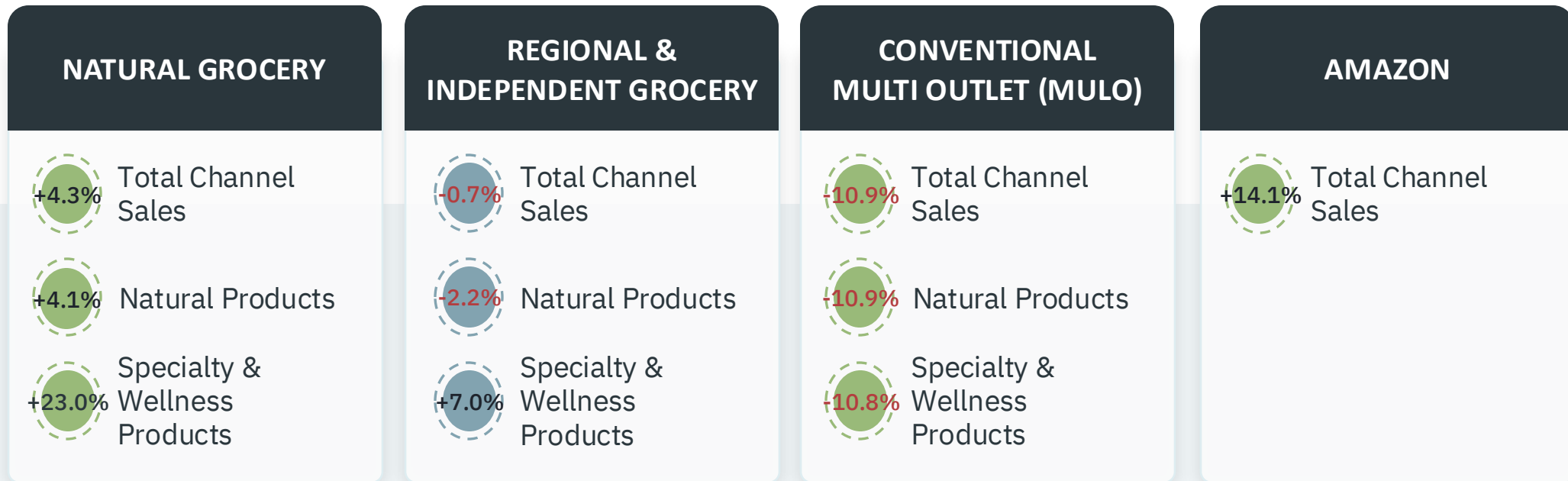


Reproductive Health

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

Top Line Channel Sleep and Stress Supplements

Sleep and Stress Supplements \$ % Change L52 Weeks



Source: 52 weeks ending 9/8/2024 SPINS SNE, MULO, powered by IRI. Sleep Supplements and Calmative & Mood Support Supplements at UPC level
Filtered by SPINS Product Intelligence – Positioning Group

Stress Supplements Category v. Ashwagandha Across Store

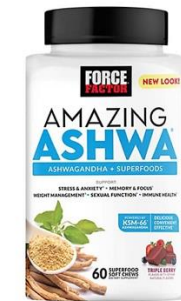
The Stress Supplements category has shown a -2.7% decline in year-over-year sales with the category's dollar sales totaling to \$301M for the past 52 weeks. However, ingredients like Ashwagandha is found across numerous subcategories.

Dollar Sales
\$301M

YOY Growth
-2.7%

Other categories where Ashwagandha is used as an ingredient

Subcategory	Sales	%growth YoY
CALMATIVE & MOOD SUPPORT SUPPLEMENTS	\$74,012,915	-12.7%
HERBAL SINGLES A TO Z	\$44,988,020	23.8%
SS TEA BAGS WELLNESS	\$12,455,951	57.1%
WATER SPARKLING FLAVORED	\$10,994,407	103.4%
FUNCTIONAL BEVERAGE OTHER	\$7,569,298	233.4%
REPRODUCTIVE SUPPLEMENTS	\$6,565,693	48.4%
PREBIOTICS & PROBIOTICS	\$4,087,195	-44.6%
SS COFFEE RTD	\$3,057,489	18.6%
SLEEP SUPPLEMENTS	\$2,494,762	14.2%



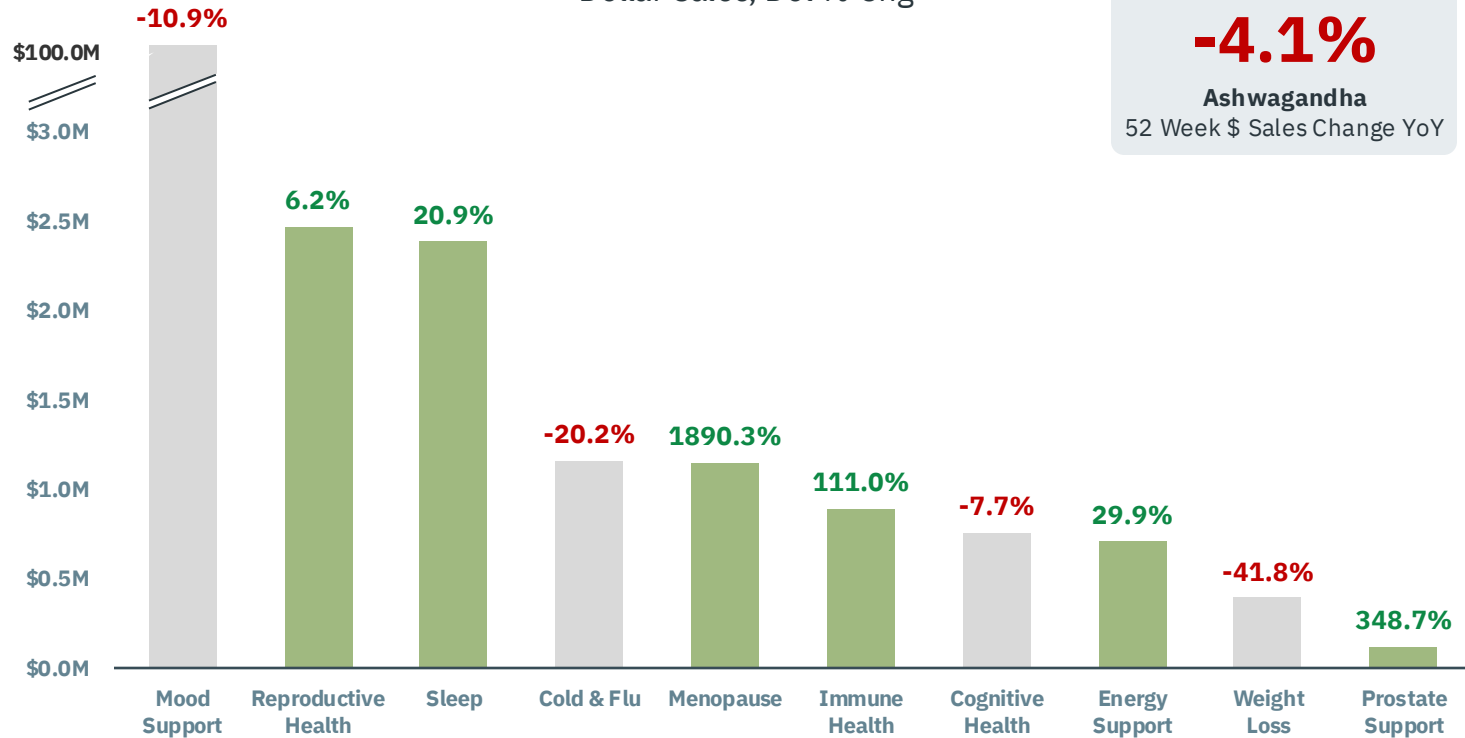
Ashwagandha: The Ancient Herb For Modern Wellness



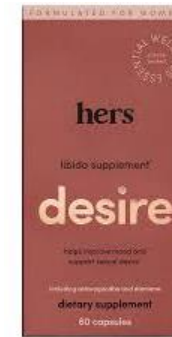
As the focus on holistic wellness grows, consumers are increasingly turning to Ashwagandha for its benefits in health, sleep, and immune support formulas.

Functional Ingredient: Ashwagandha By Health Focus

Dollar Sales, Dol % Chg



Ashwagandha Health Focus'



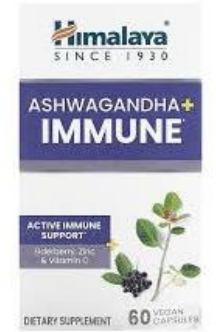
Reproductive Health



Sleep



Menopause



Immune Health

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

Top 8 Sleep & Stress Functional Ingredients

Functional Ingredient	%growth YoY
MELATONIN	-12.9%
ASHWAGANDHA	-7.4%
MAGNESIUM	19.3%
GABA	-3.1%
SPECIALTY REMEDIES (HOMEO)	-9.2%
CANNABIDIOL (CBD)	-8.1%
THEANINE	-8.4%
VALERIAN	-15.8%



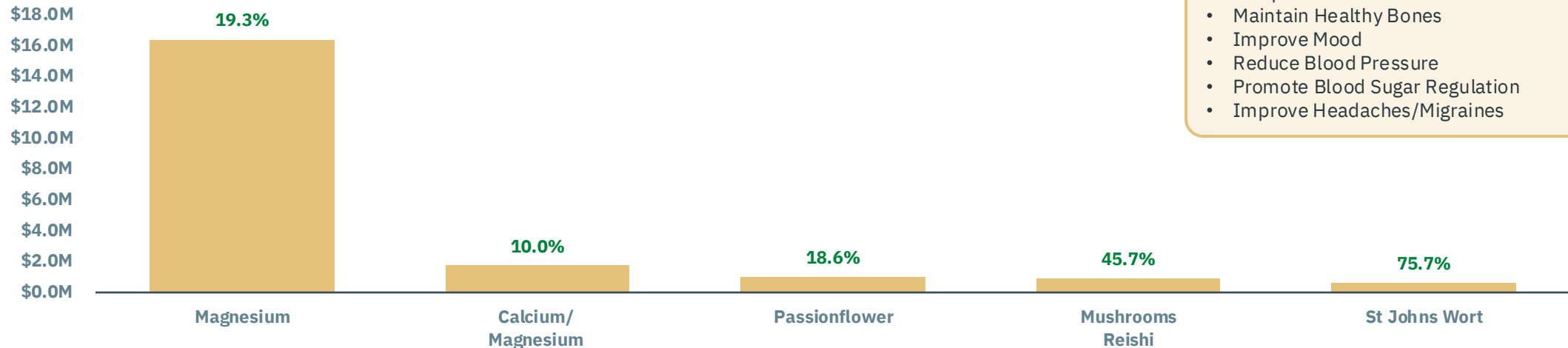
Mood, Sleep, and Stress Relief: Enhance Your Overall Wellbeing



Magnesium continues as a holy grail supplement, accounting for 27% of growth within growing sleep, calmative, and mood supplement subcategories due to its variety of benefits

Sleep, Calmative and Mood Support Supplements By Functional Ingredient

Top 10 Functional Ingredients Reporting Growth in Latest 52 weeks
Dollar Sales, Dol % Chg



Magnesium Benefits May Include:

- Sleep Aid
- Maintain Healthy Bones
- Improve Mood
- Reduce Blood Pressure
- Promote Blood Sugar Regulation
- Improve Headaches/Migraines

Example Products



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

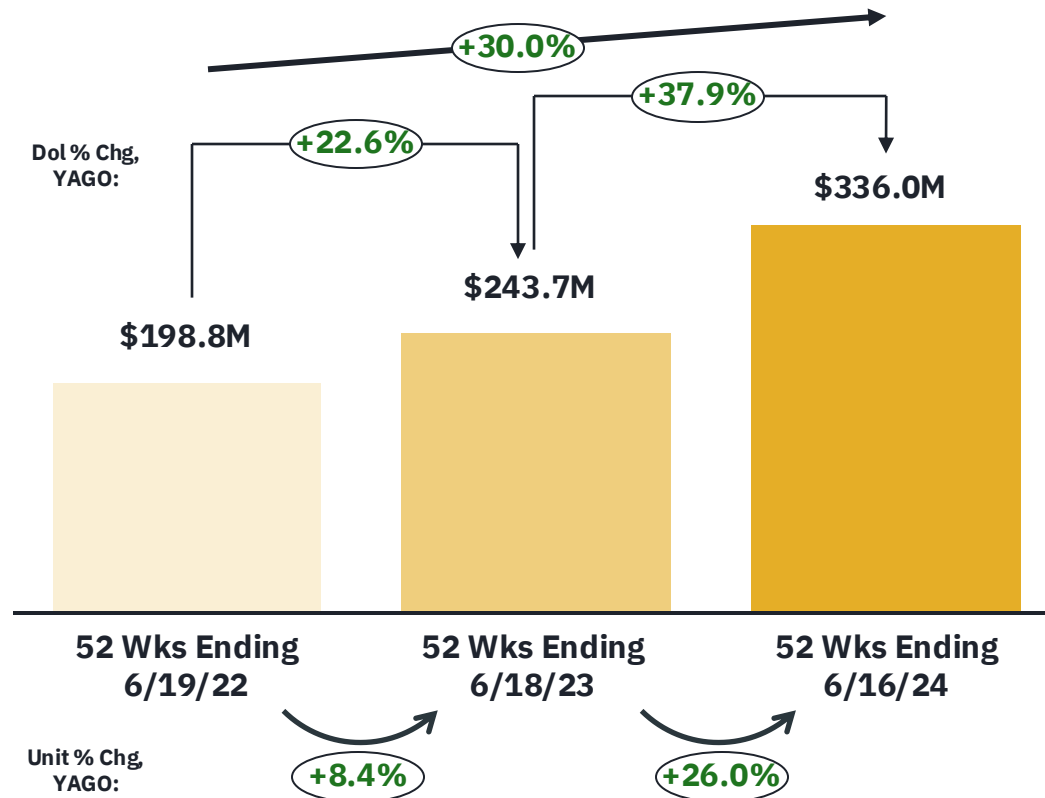


Magnesium Magic: Essential Benefits and Uses

Magnesium supplements are vital for supporting numerous bodily functions including muscle and nerve function, bone health, mood & sleep support, energy production, and digestive health.

Functional Ingredient: Magnesium 2 Year CAGR

Dollar Sales, Dol % Chg, Unit % Chg



Magnesium: Top Health Forms

Health Focus	Dollar Sales	Dollar Sales % Chg	Unit Sales % Chg	Example Product
Bone Health	\$44.5M	+27.8%	+2.0%	
Mood Support	\$42.5M	+17.6%	+12.3%	
Digestive Health	\$8.3M	+9.0%	+10.2%	
Sleep	\$7.8M	+28.3%	+9.5%	

Source: SPINS Natural Channel + Multi-Outlet (MULO) (Powered by Circana)
 Dept: Vitamins & Supplements, Functional Ingredient: Magnesium
 3 Years Ending 6/16/24

CUSTOM CODING ENGAGEMENTS POSSIBLE BY MAGNESIUM FORMS

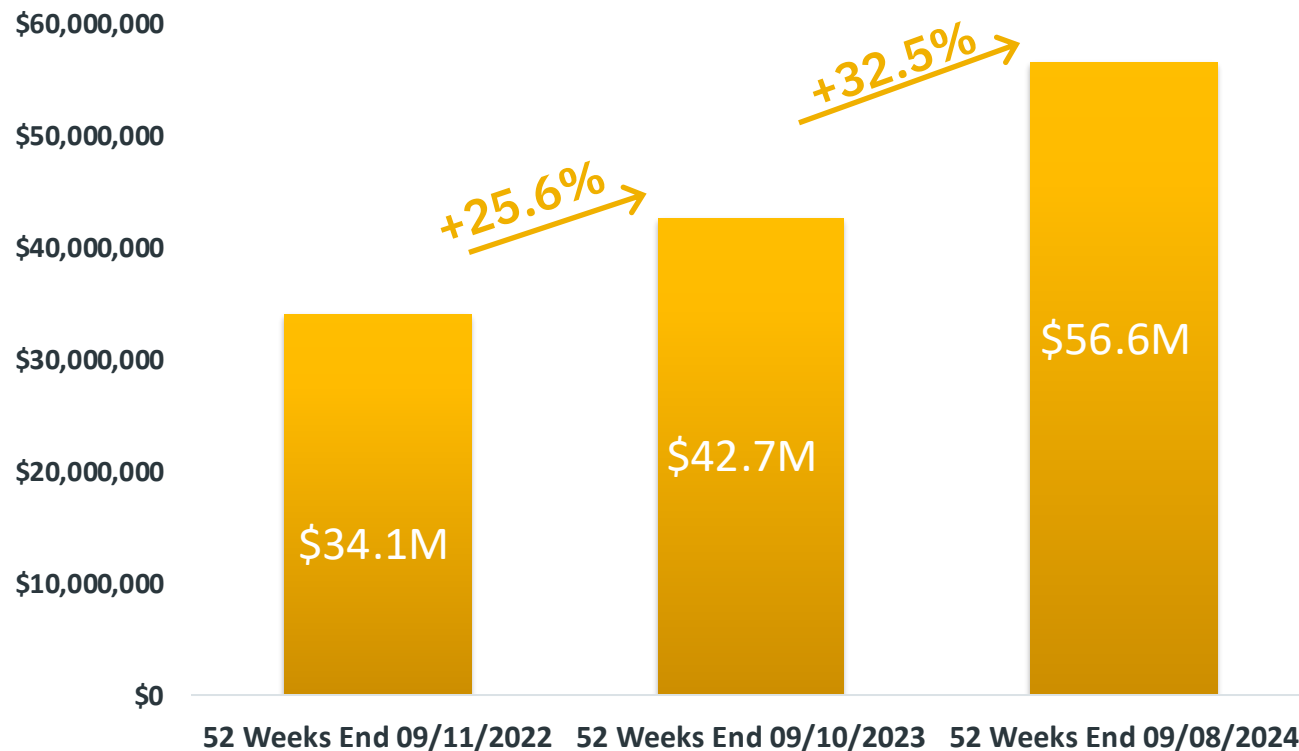


GEOGRAPHY (Multiple Items)
 TIME FRAME 52 Weeks End 08/13/2023
 SUBCATEGORY (All)
 FUNCTIONAL INGREDIENT (All)

Row Labels	Sum of Dollars	Sum of Dollars, Yago	Sum of Dol % Chg
Aspartate	\$407,670	\$369,778	10.2%
Bisglycinate	\$10,777,748	\$4,725,595	128.1%
Carbonate	\$9,594,794	\$8,424,197	13.9%
Chloride	\$1,267,628	\$1,027,853	23.3%
Citrate	\$20,416,925	\$15,797,348	29.2%
Enzyme Activated	\$309,042	\$216,981	42.4%
Glycinate	\$3,962,166	\$2,635,318	50.3%
Hydroxide	\$290,963	\$302,374	-3.8%
L-Threonate	\$4,366,070	\$3,120,251	39.9%
Lysinate	\$1,739,413	\$2,690,613	-35.4%
Malate	\$2,368,575	\$1,641,438	44.3%
Oxide	\$4,973,589	\$4,917,763	1.1%
Taurate	\$747,502	\$472,195	58.3%
Unknown	\$1,540,670	\$913,606	68.6%
Grand Total	\$62,762,755	\$47,255,309	32.8%

VMS products containing super mushrooms as a functional ingredient continue to show sales growth but a slowdown in unit sales

Dollar Sales of VMS Products that are Super Mushroom based



UNITS %CHG, 2YA

+38.1%

UNITS %CHG, 1YA

+20.8%



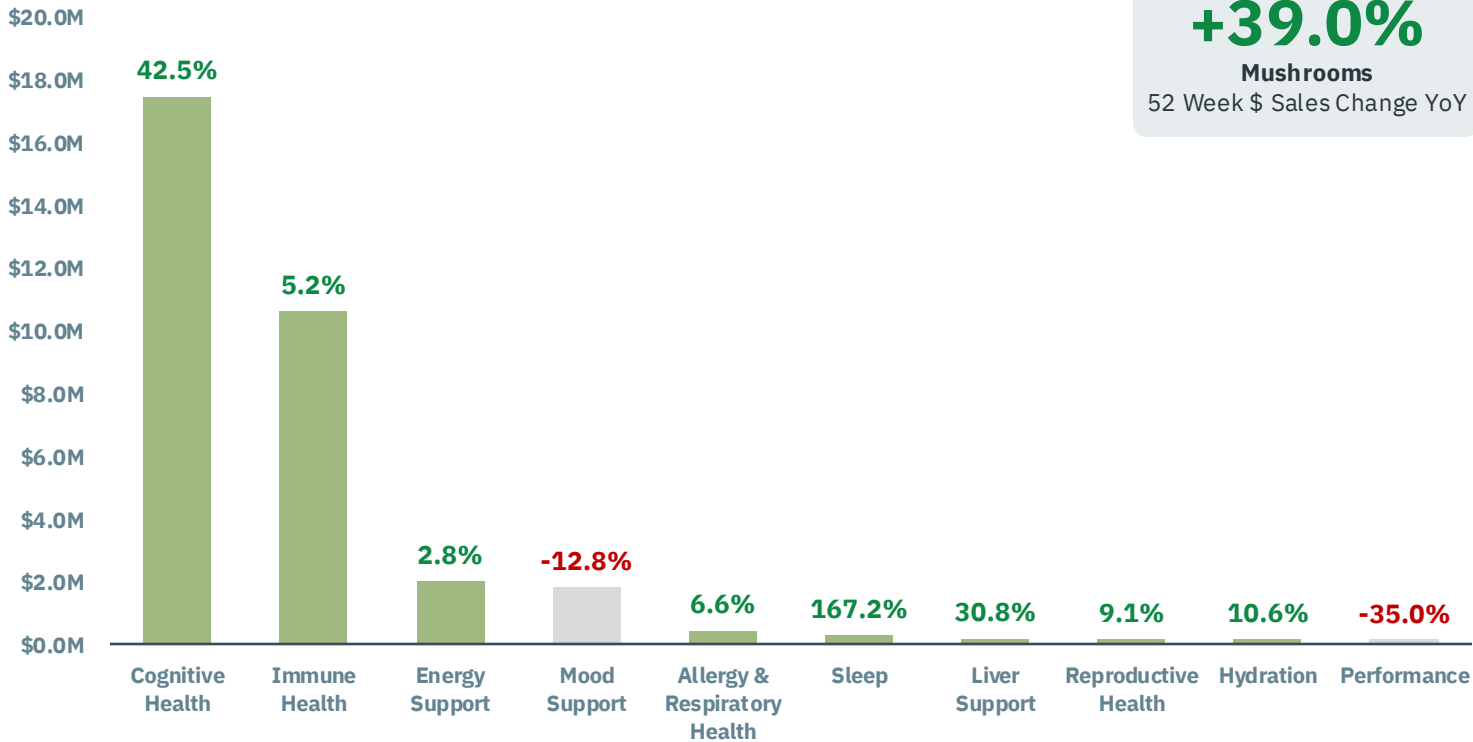
Mushrooms: Unlocking Health & Wellness Benefits



Mushrooms remain a major health trend as consumers increasingly look for formulas that support cognitive function and boost immunity.

Functional Ingredient: All Mushrooms By Health Focus

Dollar Sales, Dol % Chg

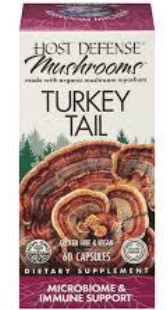


+39.0%
Mushrooms
52 Week \$ Sales Change YoY

Mushroom Health Focus'



Cognitive Health



Immune Health



Mood Support



Allergy & Respiratory Health

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

Sleep Supplements

The Sleep Supplements category has shown a -11.8% decline in year-over-year sales with the category's dollar sales totaling to \$808M for the past 52 weeks. However, ingredients like melatonin is also showing growth in other subcategories.

Dollar Sales
\$808M

YOY Growth
-11.8%

Children Sleep Supplements

\$119M | **-14.7%**

Other categories where Melatonin is used as an ingredient

Subcategory	Sales	%growth YoY
SLEEP SUPPLEMENTS	\$609,944,508	-12.5%
CHILDRENS SUPPLEMENTS	\$121,851,728	-15.3%
INTERNAL OTC SLEEP AIDS	\$25,523,575	111.8%
SS TEA BAGS WELLNESS	\$5,992,990	277.2%
TOPICAL ANALGESICS	\$2,284,184	-19.2%
HOMEOPATHIC MEDICINE FORMULAS	\$1,429,147	-40.0%
FUNCTIONAL BEVERAGE OTHER	\$1,354,952	-8.0%
CONDITION SPECIFIC SUPPLEMENTS	\$469,792	56.2%
OTHER	\$312,542	45.9%



Beverage as Medicine

Shoppers continue to rally behind beverages that are positioned to boost and support key health aspects. Watch for white space and innovation within categories to reboot shopper interest across the beverage aisle.

Top Performing Health Focuses Tracked in Beverage		
Health Focus	Sales	%growth YoY
MOOD SUPPORT	\$46,206,809	69.8%
PERFORMANCE	\$74,889,051	50.6%
DIGESTIVE HEALTH	\$1,616,258,753	35.2%
COLD & FLU	\$87,630,139	19.6%
CLEANSE & DETOX	\$18,987,713	16.9%
ENERGY SUPPORT	\$7,957,532,885	6.4%
HANGOVER REMEDIES	\$254,367	4.4%
WEIGHT LOSS	\$787,641	2.7%
IMMUNE HEALTH	\$53,607,588	2.1%
HEALTH FOCUS - NON SPECIFIC	\$63,566,432,601	0.6%

Soda Category	
Health Focus	YoY Growth
Immune Health	+387.5%
Mood Support	+186.5%
Digestive Health	+149.5%
Water Category	
Health Focus	YoY Growth
Hangover Remedies	+195.1%
Reproductive Health	+84.7%
Cold & Flu	+70.7%

Delivery Method

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

Sleep

Product Type	YoY Growth
POWDER	37.4%
PELLET	12.7%
SPRAY	10.4%
LIQUID - RTD CARBONATED	9.2%
TINCTURE	3.1%

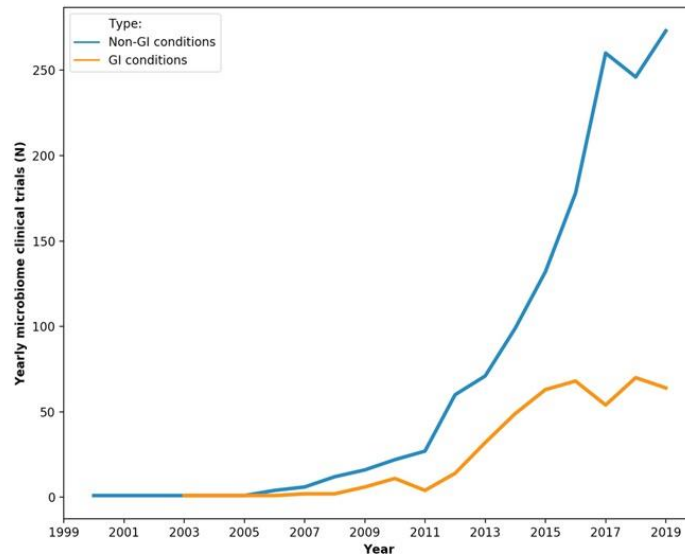
Stress & Mood Support

Product Type	YoY Growth
LIQUID - RTD CARBONATED	114.4%
SOFT CHEW	64.6%
PATCH	27.5%
POWDER	13.7%
LIQUID - CONCENTRATE / NON-RTD	9.8%

RESEARCH STUDIES

Beyond Digestive Health – Microbiome’s Influence on Sleep Quality and Mental 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 115():p S1681-S1682, October 2020.

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Open Access Review

The Role of Gut Microbiome in Sleep Quality and Health: Dietary Strategies for Microbiota Support

by Monika Sejbuk ^{1,*} ✉, Adam Siebieszuk ² ✉ and Anna Maria Witkowska ¹ ✉

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* Author to whom correspondence should be addressed.

Nutrients **2024**, *16*(14), 2259; <https://doi.org/10.3390/nu16142259>

Submission received: 3 June 2024 / Revised: 10 July 2024 / Accepted: 11 July 2024 / Published: 13 July 2024

The gut’s link to mental health

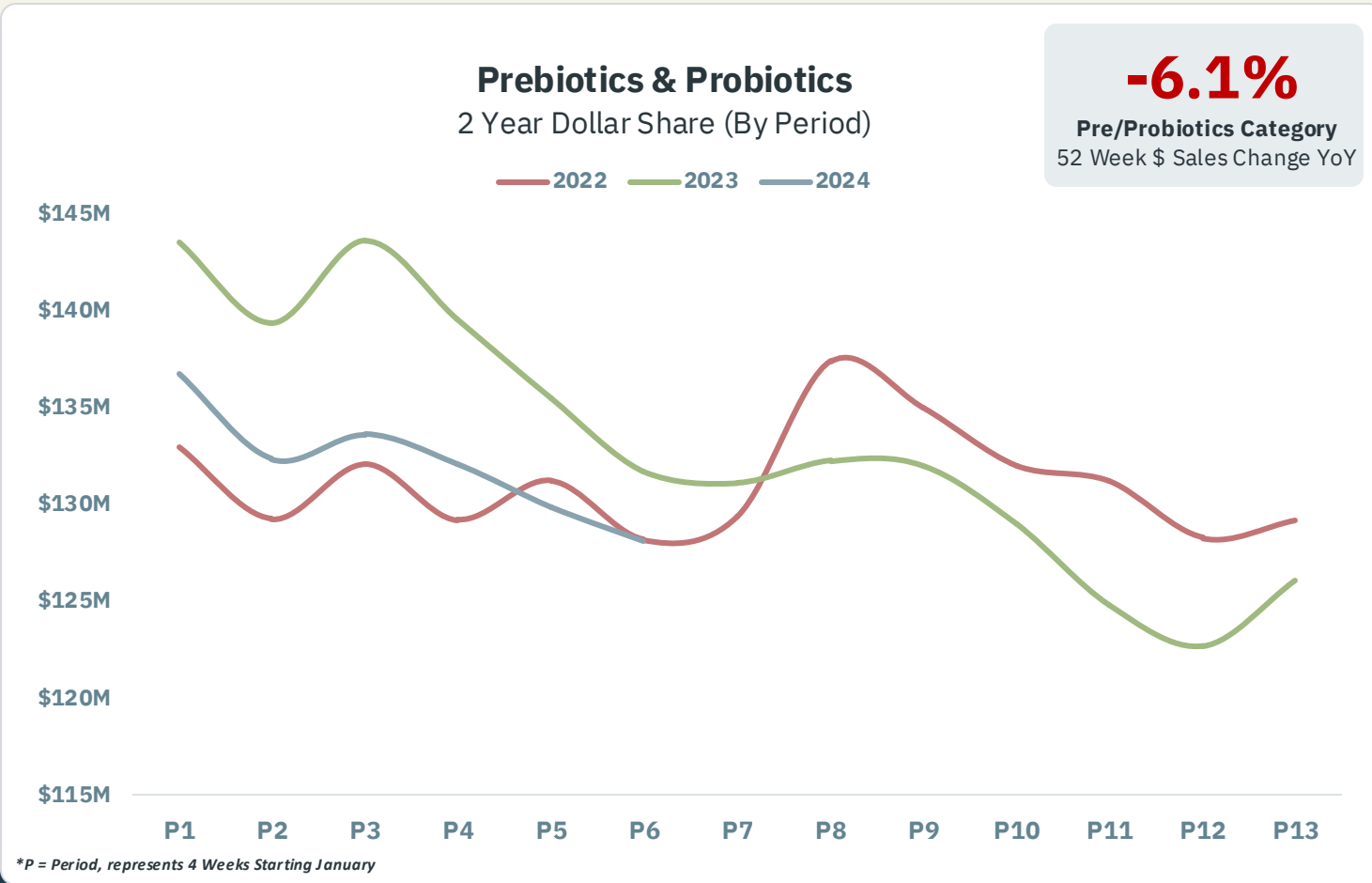
A study of a pair of 1,000-strong cohorts has strengthened the link between the community of microorganisms that live in the gut and mental health.

Nature Microbiol. **4**, 623–632 (2019)

Probiotics: Optimizing Gut Health



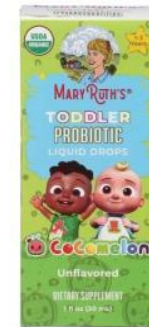
Although probiotics have trailed in the latest 52 weeks, dollar share remains steady year over year, with shoppers consistently incorporating them into their supplement routines.



Probiotic Forms



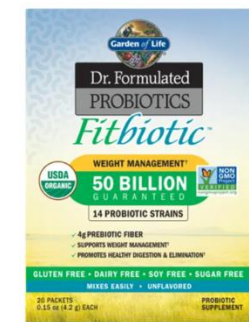
Capsules



Liquid



Gummies



Powder

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

Source: SPINS Natural Channel + Multi-Outlet (MULO) (Powered by Circana)
Dept: Vitamins & Supplements, Category: Prebiotics & Probiotics
3 Years Ending 6/16/24

12% YoY Growth in Units and Dollars on Amazon for Prebiotics and Probiotics

Categories Competitors Users

Categories / PREBIOTICS & PROBIOTICS

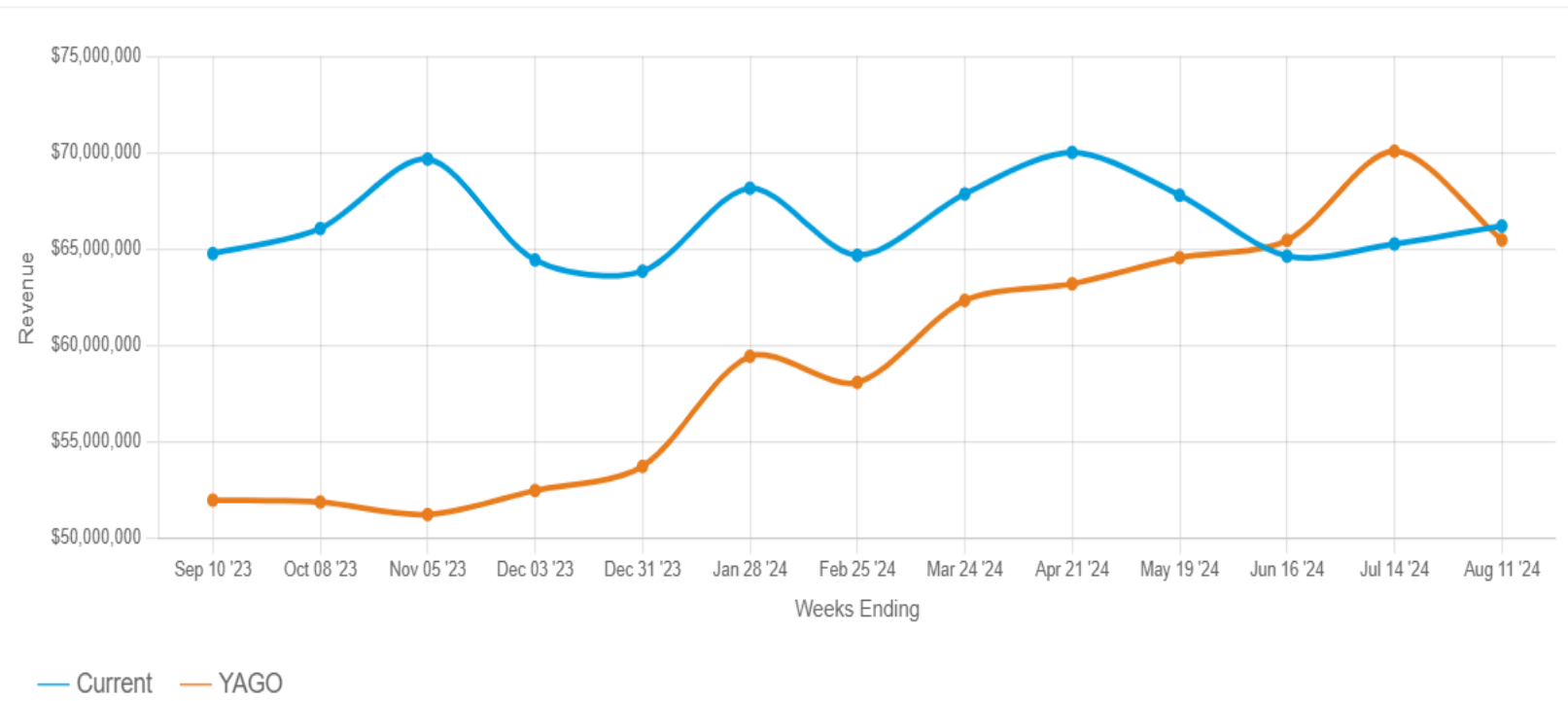
52 Week Period Ending 2024-08-11 Filter Export

29,366,039
TOTAL UNITS / +12.0%

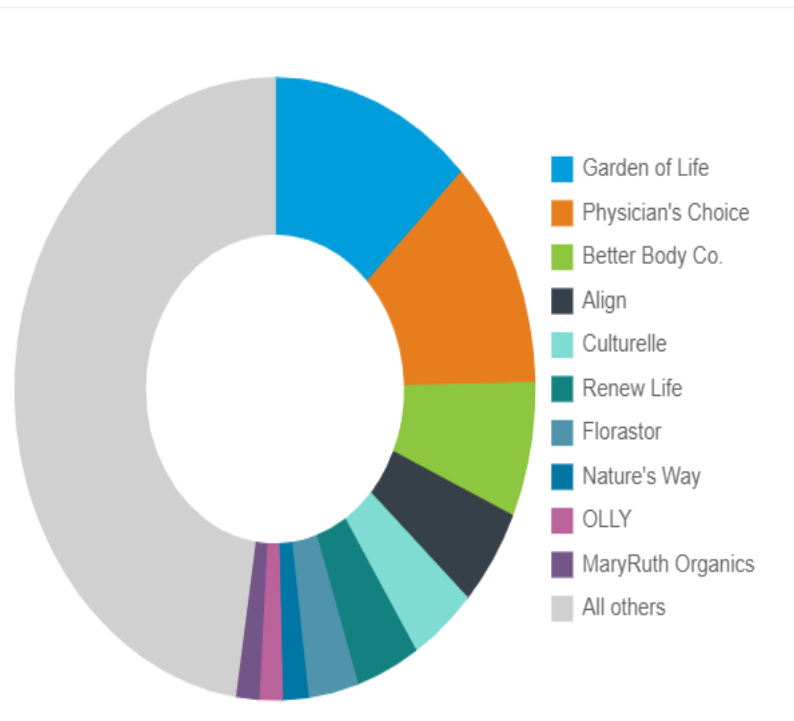
\$863,362,740
TOTAL DOLLARS / +12.2%

\$29.40
AVERAGE PRICE / +0.1%

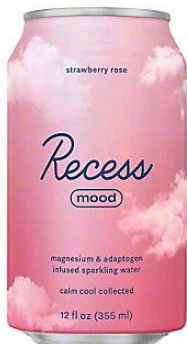
Category Revenue Over Time YAGO Compar...



Market Shared by Brand Brand



Differentiated Applications of Functional Ingredients



Beverage

New Product Forms

Daily Applications

Differentiated Applications of Functional Ingredients



Beverage

New Product Forms

Daily Applications



Thank you!

For more information contact me at
bcasteel@spins.com