



Your Trusted Partner

# Hormonal Shifts & Women's Wellness:

*New Solutions for Every Life Stage*



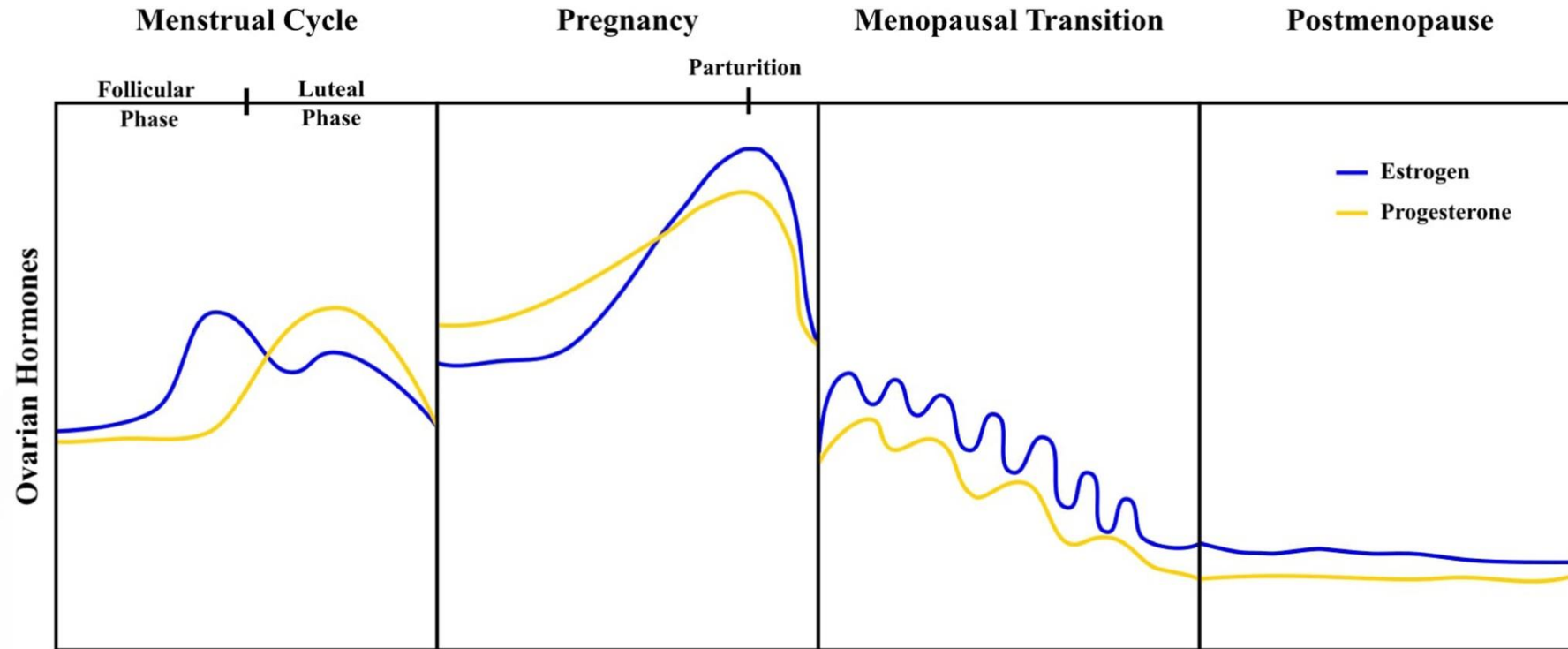
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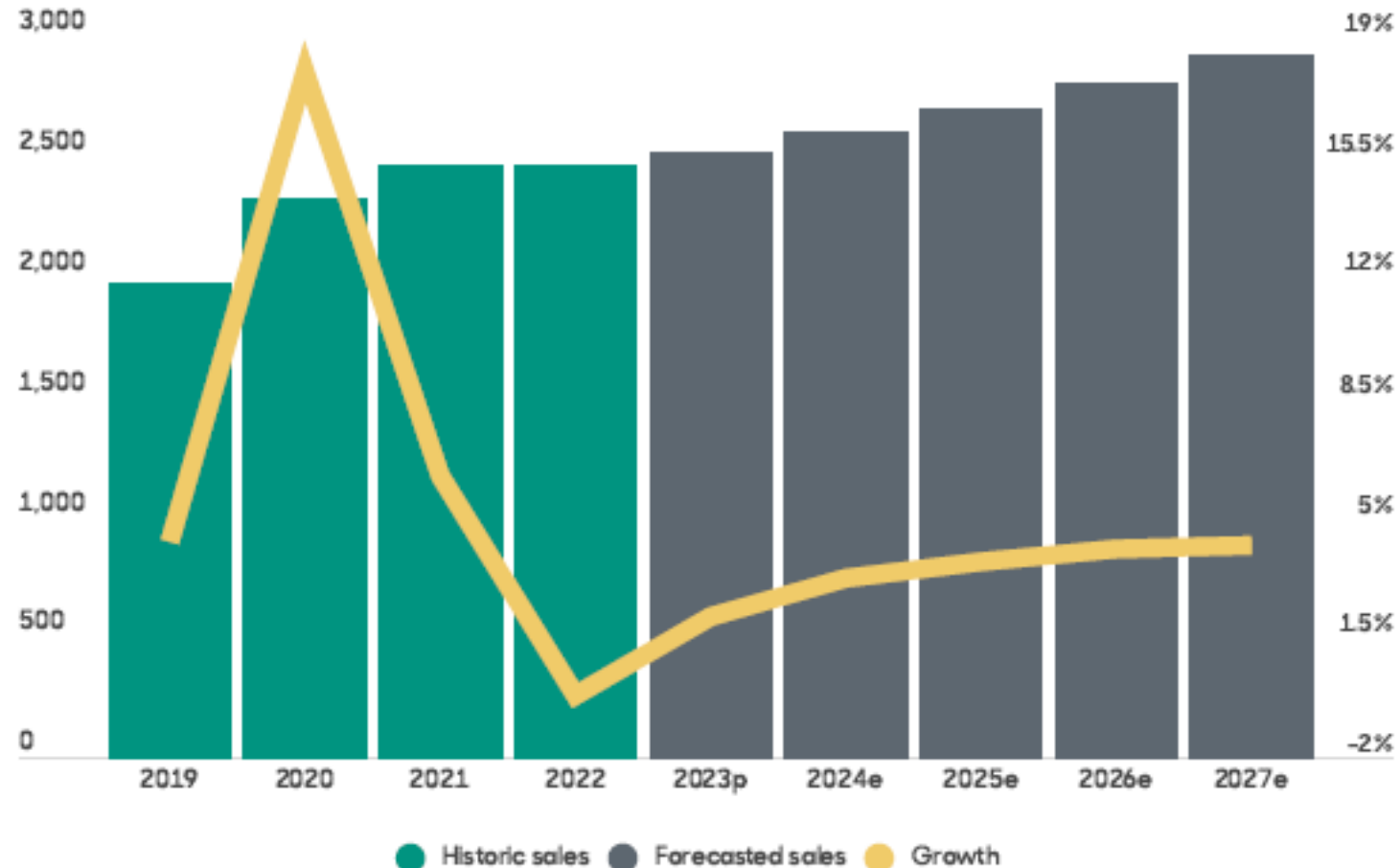
# Reproductive Hormones Fluctuate Throughout a Woman's Life

*From Puberty through Childbearing years through menopause and post-menopause*



*Each life stage has its own unique hormonal pattern and associated downstream effects on health and wellness*

## Women's general health supplement sales and growth, 2019-2027e



Source: Nutrition Business Journal (\$mil, consumer sales)

Note: Numbers are final through 2022, preliminary for 2023 based on early market predictions and estimated for 2024 and beyond.

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# Why should we care?

*Female health policies at work are changing.*



- 5 major countries have instated menstrual leave policies to protect female employees (Spain, Japan, Taiwan, Indonesia, Zambia)<sup>2</sup>
- “In January 2023, [Space10 began] offering its employees the option to work from home, rest in designated office spaces or take paid time off” as part of its menstrual/menopause policy<sup>2</sup>
- Other policy changes: miscarriage support, emergency childcare services<sup>2</sup>



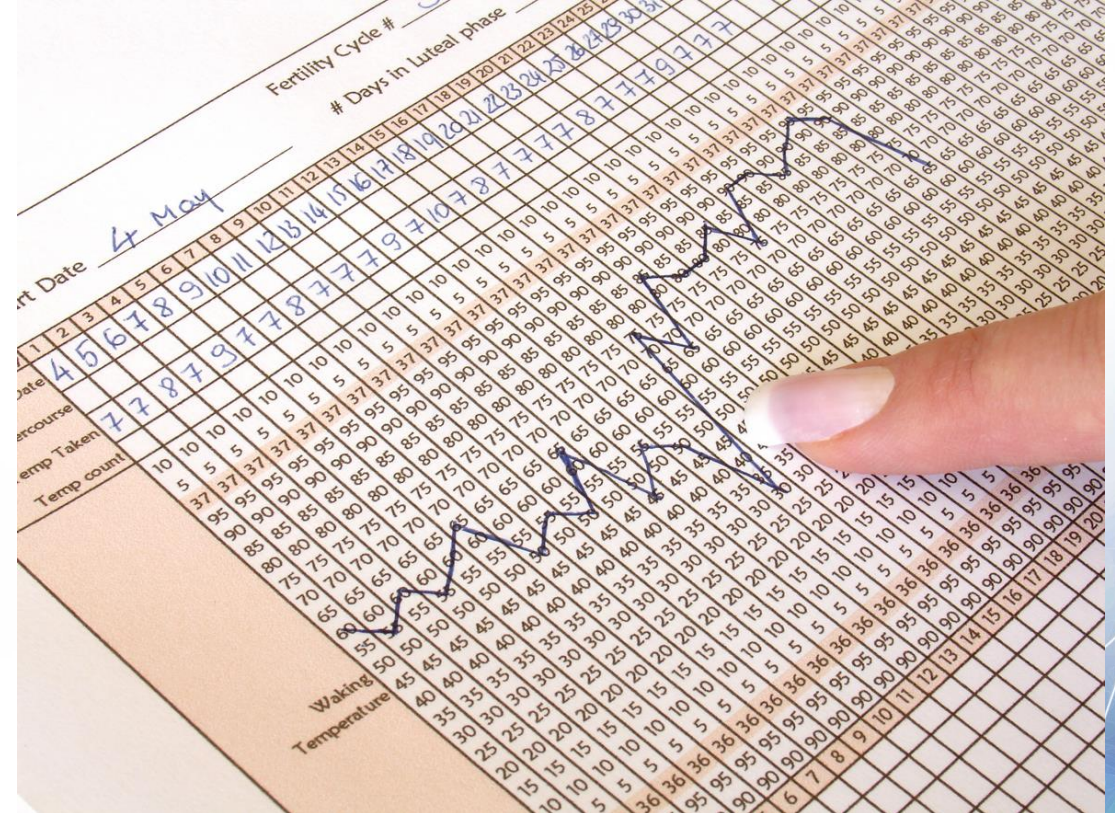
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*Hormonal birth control rejection is on the rise.*

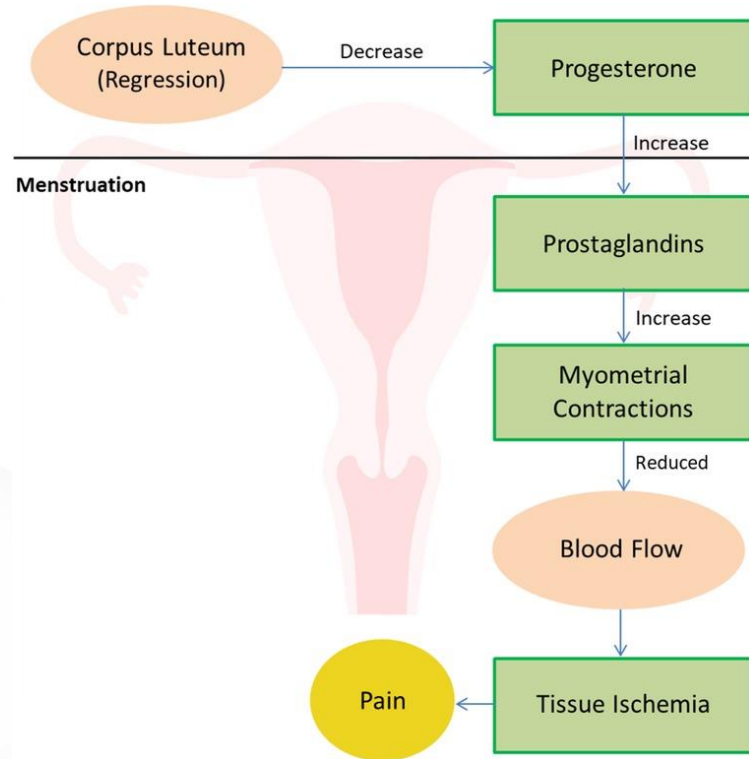
- Hormonal contraception is losing favor with Millennials and Gen Z due to impact on physical and mental well-being<sup>3</sup>
- Trending hashtags #gettingoffbirthcontrol and #naturalbirthcontrol have millions of views
- Solutions pill ditchers are using<sup>3</sup>:
  - Balance hormones through nutrition and lifestyle adjustments
  - Hormone health tracker apps
  - Menstrual cycle tracking guidebooks





# Hormone Changes During Menstruation Can Cause Discomfort

*Rapid drop in estrogen and progesterone drive uterine changes*



- *High levels of prostaglandins during menstruation lead to uterine shedding*
- *This also impacts the intestines, which can cause nausea and GI-discomfort*
- *The high levels of estrogen before menstruation can lead to water retention and bloating*

Reference: Kanchibhotla, D., Subramanian, S. & Singh, D. Front. Pain Res. 4, 1107669 (2023).

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## Clinically effective powdered ginger rhizome extract for PMS & digestive comfort

Patented, water-extracted ginger rhizome, standardized to >26% gingeroids (gingerols and shogaols)

Clinically proven to reduce menstrual discomfort & improve digestive function

Significantly effective against cramping and gastrointestinal distress in PMS after just four weeks of use

Significantly effective against symptoms such as nausea and upper abdominal bloating after just four weeks of use

Daily dose: PMS relief 100mg twice daily

Daily dose: digestive comfort 200mg twice daily



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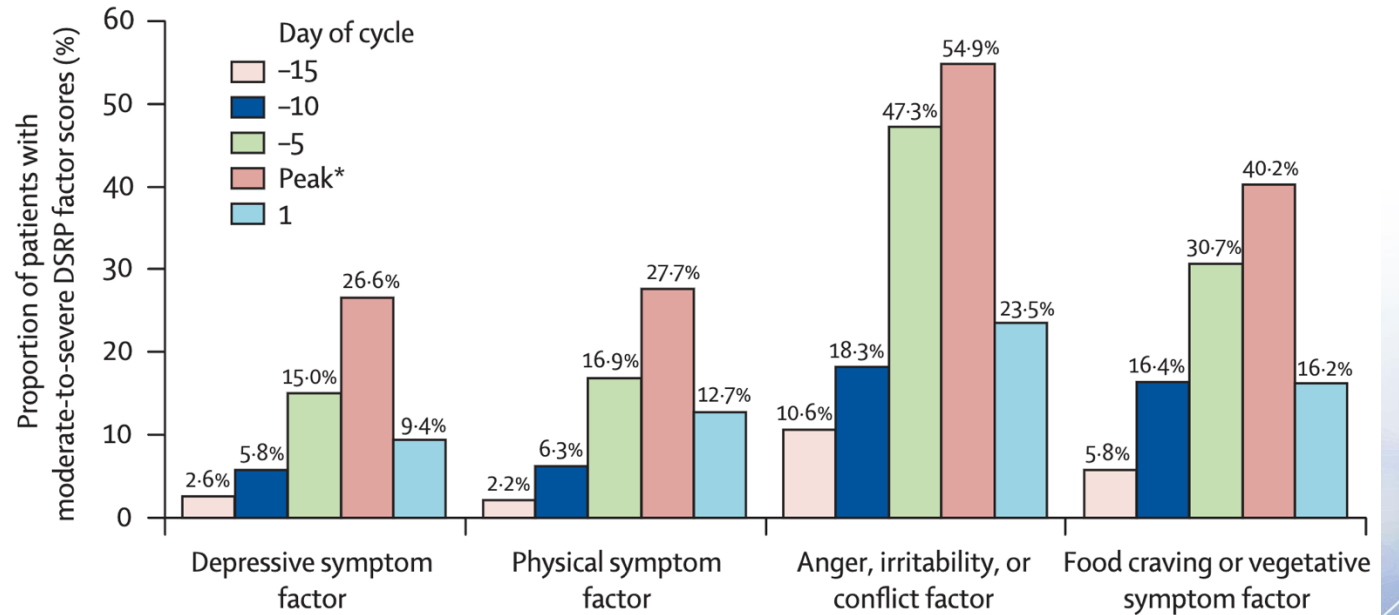


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# Premenstrual Symptoms Can Be Broad and Affect Daily Life

*Rapidly changing hormones and physical changes can lead to many symptoms*

- Approximately 47.8% of women of reproductive age worldwide experience PMS symptoms
- Around 20% of women report symptoms severe enough to disrupt their daily activities
- Some common symptoms include:
  - Headache
  - Irritability
  - Bloating
  - Weight Gain
  - Food Cravings





# ATAMg<sup>®</sup> ... The Activated Taurine and Magnesium



Bioavailable Acetyl-taurine  
& Magnesium

Proven Intracellular  
Bioavailability

Water Soluble; Taste Free

Supports Women's Health  
(PMS)

Lipophilic Structure

NDI; EFSA Approved

Supports Brain Health

Structurally Similar to  
Excitatory Neurotransmitters

Format & Formulation Flexible

**ATAMg<sup>®</sup>** A patented Magnesium N-Acetyl Taurinate with enhanced intracellular bioavailability due to its lipophilic structure. With clinical evidence to support women's PMS symptoms (cravings, headache, mood, etc.), this multifaceted ingredient is the perfect choice for a women's health and holistic wellbeing product



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# Why should we care?

*Women's intimate wellness drops the towel.*



- Intimate Wellness Categories = menstruation, menopause, pregnancy, postpartum, sex care
- Top brands succeed by:
  - Tackling feminine hygiene and sex care stigma and shame head-on
  - Offering sustainable solutions
  - Crafting calming and clear communication and branding
  - Offering a holistic product line to address multiple concerns

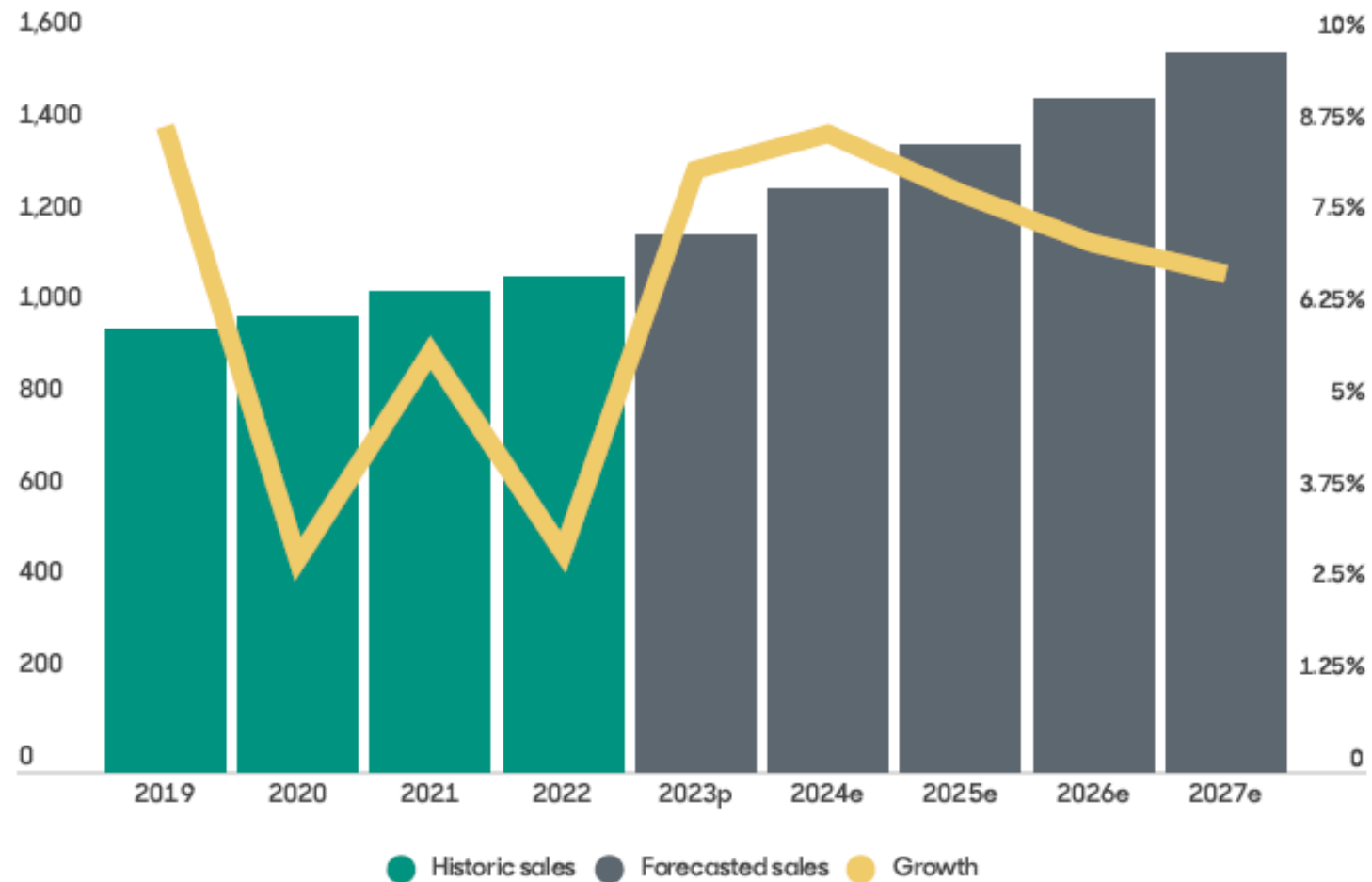
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## Sexual health supplement sales and growth, 2019-2027e



Source: Nutrition Business Journal (\$mil, consumer sales)

Note: Numbers are final through 2022, preliminary for 2023 based on early market predictions and estimated for 2024 and beyond.



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# Hormonal Fluctuation in a Woman's Life Can Affect Sexual Desire

*Hormones act differently to influence libido*

## During Menstrual Cycle

### *Libido is Tied to Ovulation*

Estrogen and testosterone are at their highest levels during ovulation increasing sexual drive

After ovulation, during the luteal phase, progesterone rises and can reduce libido. Falling estrogen can lead to vaginal dryness and discomfort

Premenstrual symptoms can also affect libido due to discomfort and mood swings

## Pregnancy and Nursing

### *Libido Fluctuates Greatly*

Libido is low in the first trimester due to high progesterone and lower testosterone

Second trimester sees a surge in estrogen and testosterone leading to a boost in libido

Postpartum and nursing involves high levels of prolactin which inhibits estrogen reducing libido and increases vaginal dryness

## Menopause

### *Estrogen Decline Impacts Libido*

Estrogen depletion following menopause leads to dryness and thinning of vaginal walls which leads to sexual discomfort

Arousal may decrease due to reduced blood flow to the vaginal area

Mood and sleep disturbances due to fluctuations in estrogen during menopause can impact libido

References: Fernández-Carrasco, F. J. *et al. Public Heal. Rev.* **44**, 1606308 (2024)

Roney, J. R. & Simmons, Z. L. *Horm. Behav.* **63**, 636–645 (2013)

Simon, J. A. J. *Women's Heal.* **20**, 1453–1465 (2011)



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# Liboost®

## Spanish Damiana extract for enhanced intimate health & well-being

92% improvement in women's sexual health parameters including desire and vaginal lubrication

Raw material from Mexico  
Manufactured in Spain

Genuine Damiana extract  
(*Turnera diffusa*)

Extra quality control to mitigate adulteration



Consumer study support with new clinical study publishing summer 2025

Standardized to 1.5% total Liboonoides™ bioflavonoids by HPLC with evidence of beneficial properties

Daily dose: 300 mg/day

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# Why should we care?

## *Menopause is mainstream.*



- 1 billion menopausal women globally<sup>1</sup>
- Menopause market predicted to hit \$22.7bn by 2028<sup>1</sup>
- Top motivations
  - Skin care (elasticity/firmness, melasma)
  - Hair care (graying, hair loss)
  - Hormonal care (hot flashes, mood swings, libido)



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# Periods of Hormonal Fluctuation in a Woman's Life Can Affect Hair Quality

*Estrogen and progesterone are important factors in hair growth and retention*

## During Ovulatory Cycle

### *Temporary Hair Shedding*

Decline in estrogen and progesterone makes hair follicles more susceptible to entering the telogen (resting phase) which can lead to shedding

## After Childbirth

### *Postpartum Telogen Effluvium*

During pregnancy there is typically an increase in hair growth, diameter, and percentage of hairs actively growing

After pregnancy, the rapid decrease in estrogen and progesterone result in a hormonal environment that no longer supports the rapid growth and retention of hair leading to sometimes substantial hair loss in the months following

## After Menopause

### *Female Pattern Hair Loss*

Estrogen depletion following menopause leads to a thinning of hair fibers due to shrinkage of the hair follicles and shorter hair follicle cycles

Androgens (DHT) may be higher post menopause leading to inhibition of hair growth on the crown and temples



## New Zealand sheep's wool keratin for clinically supported hair, skin, and nail benefits

Pure keratin protein in solubilized, digestible, functional form

Clinically studied to reduce hair fall by 43% and improve skin barrier function by 12.5% in just 60 days

Triggers expression of collagens IV & VII, strengthening hair follicle anchoring for reduced shedding & improved appearance of wrinkles

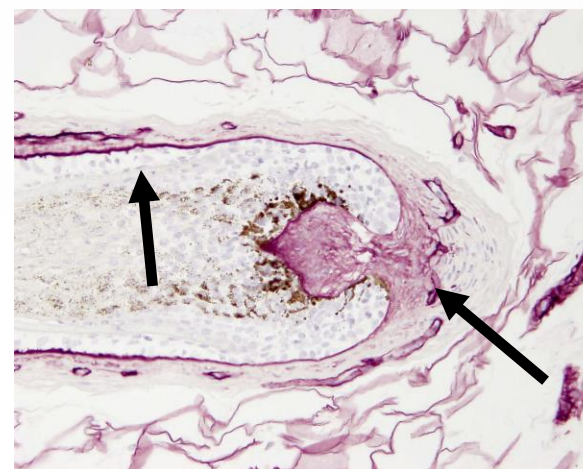
Rich in cysteine, upregulating glutathione and taurine production to reduce oxidative stress

Daily dose: 400mg

Ethically sourced, regeneratively produced, and vegetarian



Collagen IV (purple)  
before keratin



Collagen IV (purple)  
after keratin



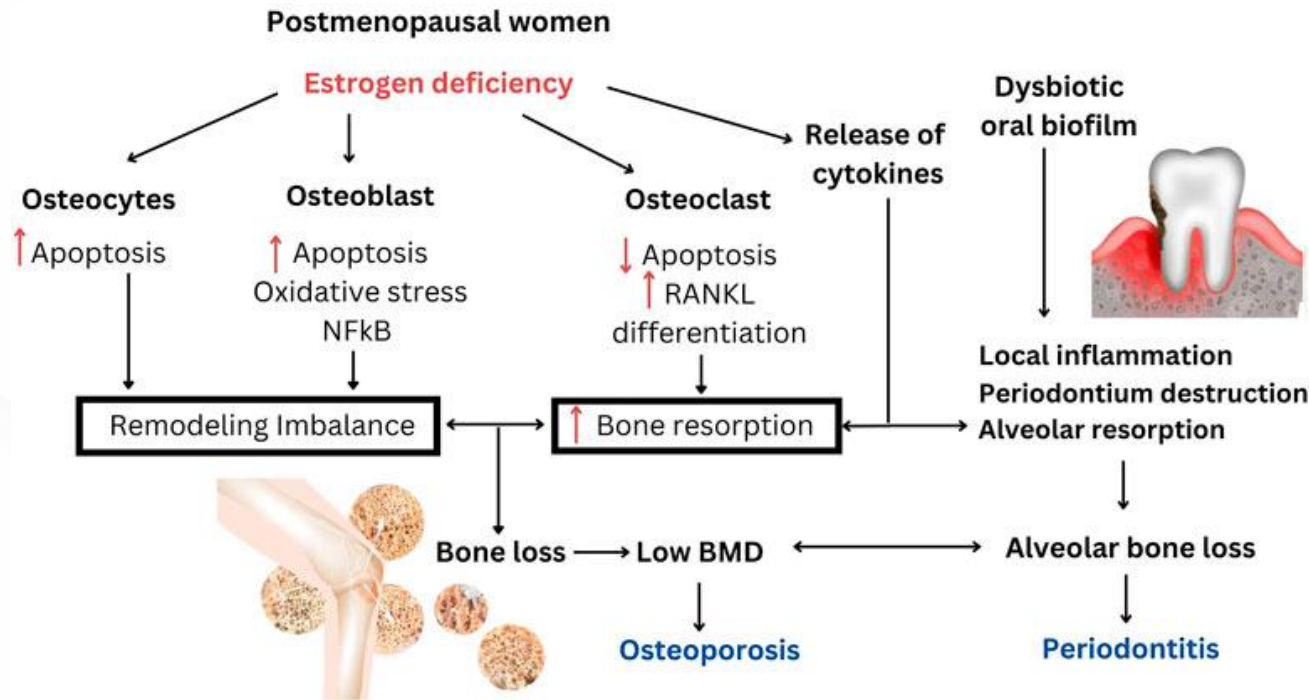
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# Menopause Can Affect Bone Density and Strength

*Estrogen deficiency after menopause results in bone resorption and demineralization*



## Factors important to bone health in menopause:

- *Calcium to support mineralization (hardness)*
- *Vitamin D3 to help with calcium absorption and bone mineral density via supporting osteoblasts (bone building) and regulating osteoclasts (bone resorption)*
- *Collagen makes up the majority of bone matrix providing tensile strength (flexibility) and can stimulate osteoblasts (bone building)*
- *Collagen, Vitamin D3, and Calcium work collaboratively to enhance bone density and strength*

References: Jayusman, P. A. *et al. Front. Pharmacol.* **14**, 1120457 (2023)

Zhu, K., Devine, A., Dick, I. M., Wilson, S. G. & Prince, R. L. *J. Clin. Endocrinol. Metab.* **93**, 743–749 (2008)

Garnero, P. *Calcif. Tissue Int.* **97**, 229–240 (2015)



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# VegD3<sup>®</sup> ... Gold Standard Algal Vitamin D3



100% Plant-Source (Algae)

Meets US and EU Pharmacopeias

Non-GMO Project Verified;  
GRAS

Organic; Solvent Free

Proven Bioavailability

Format & Formulation Flexible

Sustainable & Traceable SC

Stable in Beverage Applications

Vegan Society Certified

**VegD3<sup>®</sup>** A pure, sustainable, solvent-free, organic, plant-based gold standard Vitamin D3 in the market with superior quality, bioavailability, and stability making it ideal choice for functional foods, beverages, and supplements



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# Patented Collagen-Calcium Chelate For Bone Strength, Flexibility and Improved Bone Mineral Density

Patented calcium-collagen chelate

Delivers proteins and minerals in a form that mimics the natural bone matrix

Binds calcium to bone collagen for strength and flexibility

Improves bone mineral density significantly better than calcium within 3 months

Clinically proven to improve bone biomarkers & reduce bone reabsorption (3-mo and 12-mo trials)

Self-affirmed GRAS

Efficient dose of 3-5 g/day

Heat stable; Water soluble



# What does this mean for supplement companies?



- Younger generations of women are increasingly cynical about hormonal birth control – however, issues with non-hormonal methods (IUD) and unwanted pregnancy are equally problematic
- Millennial women are changing the dialogue on feminine hygiene, menopause, and sex care; Gen Z will carry it forward
- Approaching women with natural, sustainable, personalized, and multi-faceted health solutions is how the top brands are winning in an increasingly crowded market



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# Thank You!

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1. Bennet, Elizabeth. "Rethinking Menopause, Mid-Life, & Mature Beauty". Stylus, April 2023.
2. Creemers, Nienke. "Go With the Flow." Stylus, March 2023.
3. Creemers, Nienke. "Hormone Report." Stylus, September 2023.
4. Consumer Product Team. "Women's Intimate wellness Brands to Know." Stylus, October 2023.

