



What's Trending in Women's Health



Meet Your Presenter



Evonne Chan

Sr. Market Insights Analyst
SPINS

For the past 25 years, **SPINS** has been powering and defining the natural products industry.



GOOD FOR
HEALTH



GOOD FOR
ANIMALS



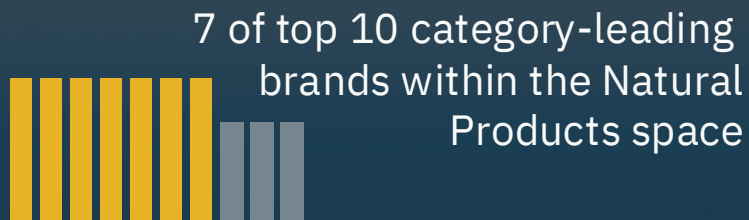
GOOD FOR
PEOPLE



GOOD FOR
PLANET

SPINS WORKS WITH

1500+ Brands



70%

50%

of all U.S.-based brands that have been acquired or funded over the last 24 months*

Brands that work with SPINS grow 22% faster on average than those that don't

22%

**per Whipstitch top 60 deals*

SPINS HAS

76+

Exclusive Retail Partnerships

REPRESENTING

>\$200B

In Sales

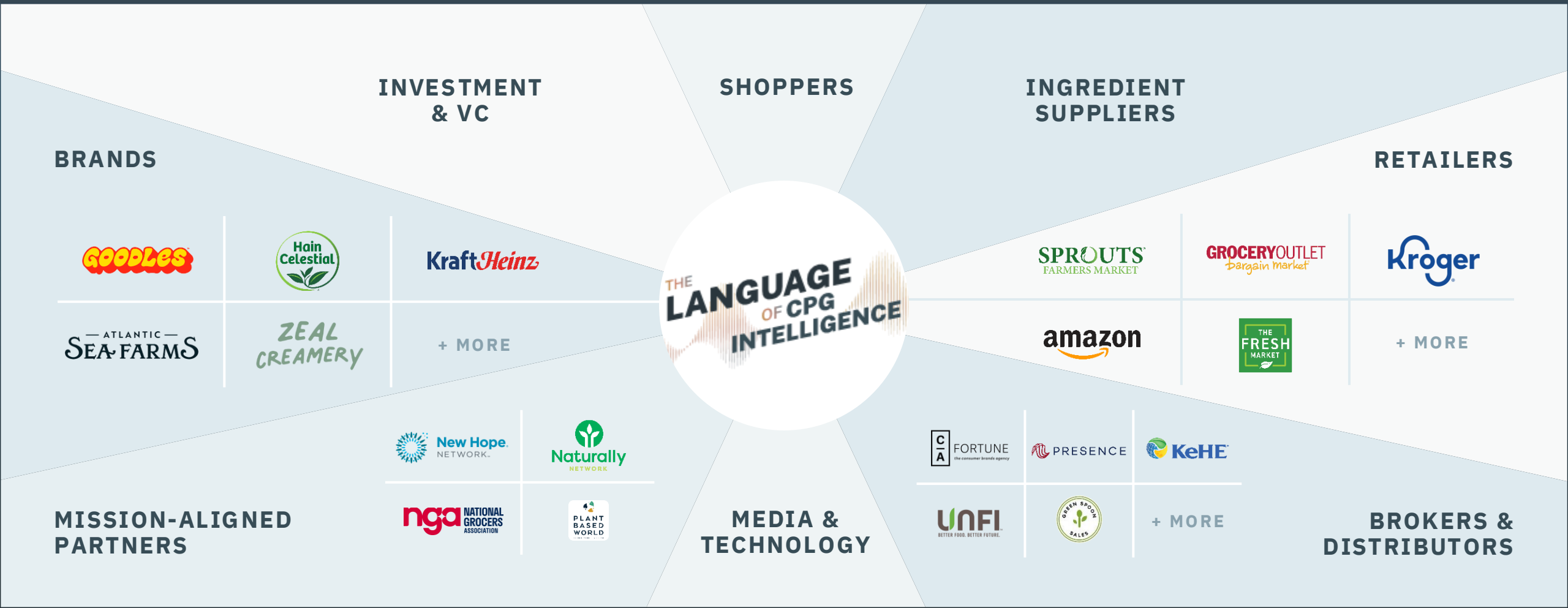
SPINS clients launched over 100,000+ items in the last 3 years



380+
Ecosystem Partners

(excluding brands & retailers)

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





Focus on **women's health** continues to gain traction

A Growing Women's Health Market: The Perimenopause & Menopause Opportunity

Over the past few years, growth in the women's health supplements market has been tremendous and it's not slowing down. In addition, a recent Nutrition Business Journal survey...

📍 Marriott, Platinum Ballroom 5

🔗 Supplements & Nutrition



Cassie Smith
SupplySide



Sherry Frey
NielsenIQ



Diana Melencio
XRC Ventures



Darren Viscount
Bristol Farms



Jessica Mulligan
Winged Nutrition

Expo West Conference Programming

Halle Berry, 58, Relaunches Wellness Platform Respin For Menopause—And Shares An Exclusive Workout

"What deserves a respin more than menopause?"

The Science and Innovation Behind the Booming Women's Health Market

Thursday, August 01, 2024:10:45 AM - 11:30 AM



Description

The boom in women's health products is supported by an increasing number of women-led marketing, science and innovation teams. During this insightful panel, we showcase three of the powerful voices behind today's top women's health and dietary supplement companies as they reveal how they're ensuring that their companies authentically connect with women with products that are backed by research supporting targeted results.

Education



u/Vegetable-Whole-2344 • 1 day ago

Are we starting perimenopause earlier than our moms and grandmas?

I'm in full blown perimenopause at 42. My mom and grandmother had regular periods until their late 50s. Am I on track to going through menopause years earlier than they did? I have a healthy lifestyle. Is this environmental? Bad luck? Is this commonly happening now? I've heard menopause symptoms are getting worse for many women - is the age getting earlier too?

Perimenopause

👍 415

💬 367



🔗 Share



u/Specialist_Corner607 • 7 days ago

Just Diagnosed with PCOS & Overwhelmed—Where Do I Even Start?

I was just diagnosed with PCOS, and honestly, I don't even know where to begin. There's so much conflicting information out there—what to eat, what to avoid, what supplements might help, and what's just a waste of time. Some sources say to avoid dairy, but then others say there's not enough research to support that. Some say to cut carbs, others say to focus on complex carbs. It feels like a never-ending cycle of "do this, but don't do that." I don't struggle with an irregular cycle, but I do have excess hair growth, and I just feel like my body is working against me. I want to manage this properly, but I don't even know what "properly" means. How did you guys...

General/Advice

👍 7

💬 12



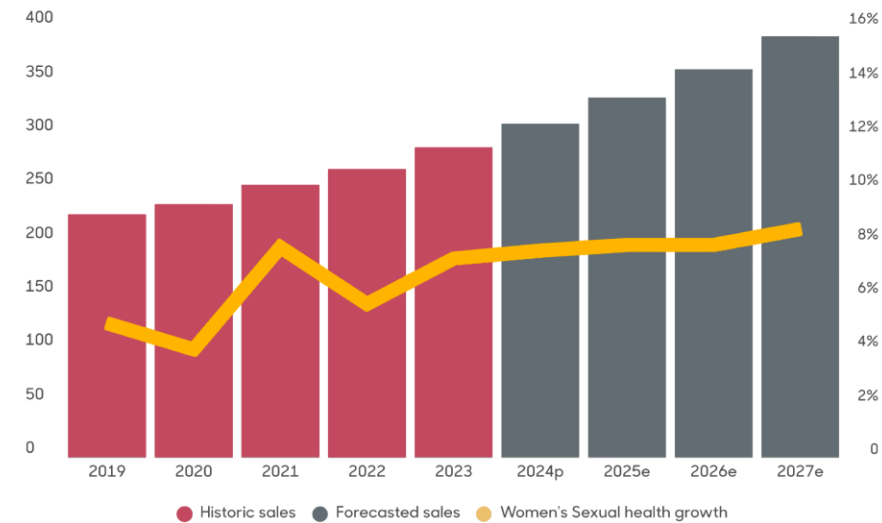
🔗 Share





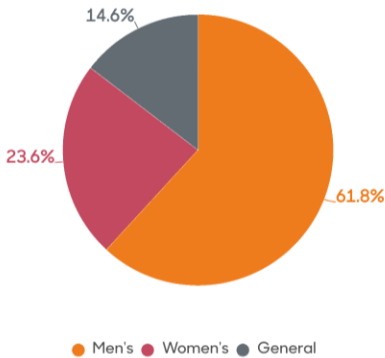
Hormone-related health products **remain key growth opportunity** as awareness and research catch up

Women's Sexual Health supplement sales and growth, 2019-2027e



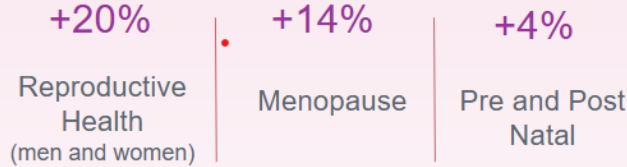
Source: Nutrition Business Journal (\$mil, customer sales)

Sexual Health supplement sales by gender, 2024



Source: Nutrition Business Journal

Sales growth of supplements with specific Health Focus



Over 200 new items have been introduced in Reproductive Health over the last year

Source: SPINS Total US Natural Expanded Channel + MultiOutlet (powered by Circana), 52 Weeks Ending 1.26.2025; SPINS Health Focus attribute

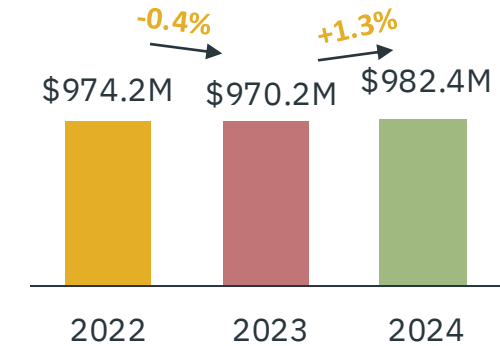


How are women's health supplements performing?

Top 5 Subcategories in terms of Dollar Chg. for VMS – Gender: Woman

Top 5 Dollar Gainers			
Category	\$ Sales	\$ Chg. vs PY	Dollars, % Chg
REPRODUCTIVE SUPPS	\$77.4M	+\$8.3M	+12%
BEAUTY SUPPS	\$12.0M	+\$7.1M	+148%
PRE & PROBIOTICS	\$159.7M	+\$5.0M	+3%
ORGAN SUPPORT SUPPS.	\$7.2M	+\$1.7M	+30%
CHILDREN SUPPLEMENTS	\$17.4M	+\$0.7M	+5%

Women's Health In Retail 2023

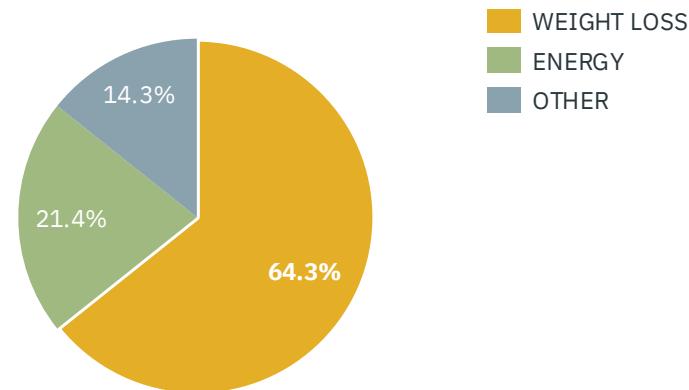




Next Wave of Women's Sports Nutrition

Women's Sports Nutrition is underrepresented, and what exists today is primarily for "Weight Loss" and "Fat Burn"; in 2025 we expect to see greater diversity and functionality in women's sports nutrition.

Health Focus (in Women's)



"Within 1,829 sports nutrition studies, across different supplements, **0-8% of studies investigated women exclusively**, while 0-2% were designed to compare sex-based responses. Further, the annual publication of female-specific studies was **~8 times fewer** than male-specific studies."

-NCBI 2022

Top Functional Products



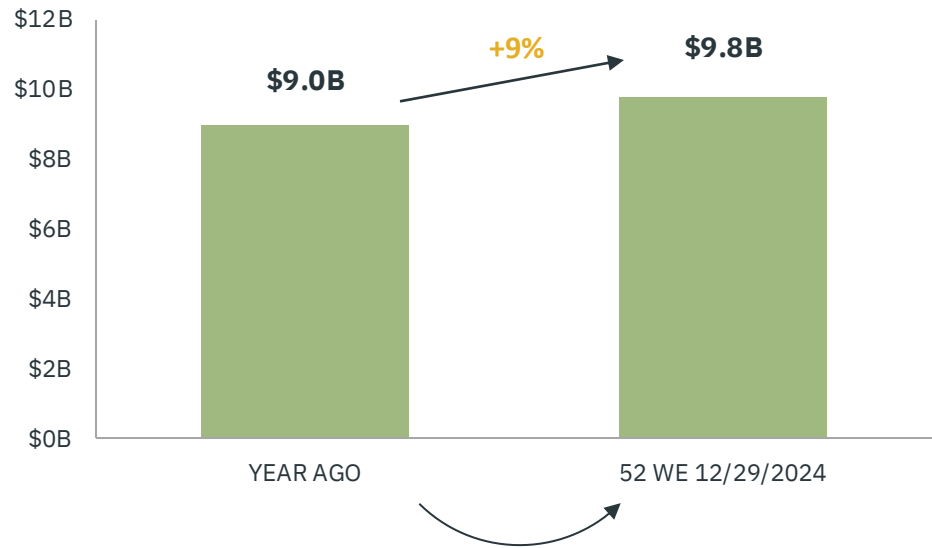
From pre- to post-workout, women's sports nutrition products are being formulated with whole foods and functional ingredients related to women's health



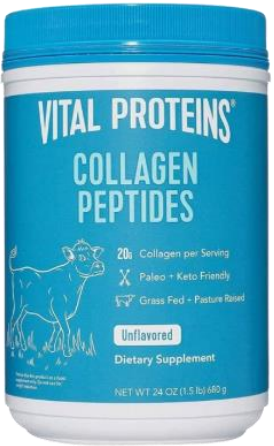
Protein Supplement & Meal Replacements

Two-Year Trend Insights

Sales Volume Growth



Units % Chg, YAGO:	+8%
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High Protein

Consumers, with increasingly more women are looking for high protein label claims

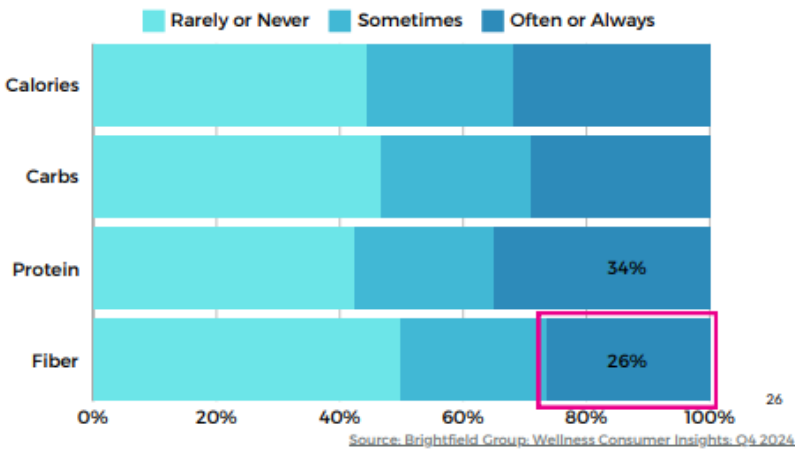
Whey Protein Powder is driving the most sales & growth

SOURCE	MARKET SHARE	YOY GROWTH
Whey	39%	+10% #1
Collagen	24%	+0%
Plant	17%	+0%
Animal	4%	-12%
Blend (Animal & Plant)	3%	-3%

Social Media Trending: 30-30-3

30 grams of Protein, 30 grams of Fiber, 3 Probiotic Foods

Track Daily Consumption



BRIGHTFIELD GROUP



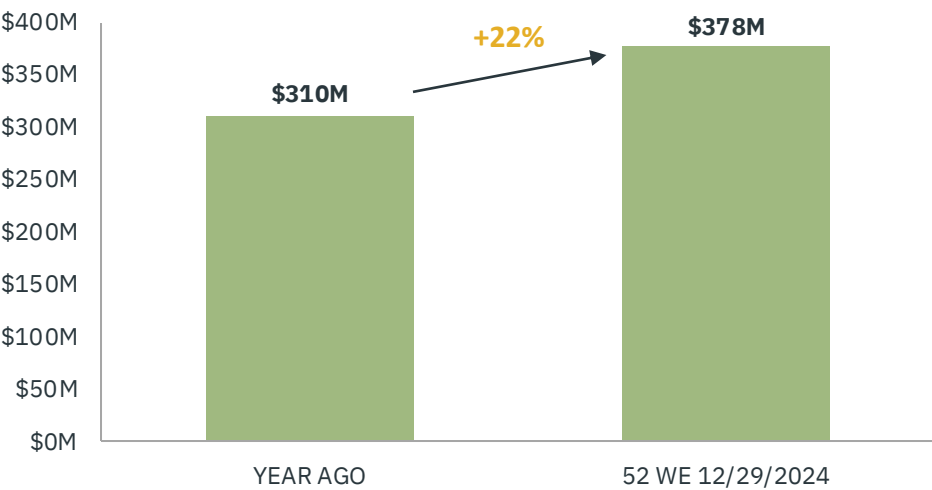
WHAT'S TRENDING IN WOMEN'S HEALTH?



Creatine

Two-Year Trend Insights

Sales Volume Growth



Units % Chg,
YAGO:

+35%





Focus on **women's health** continues to gain traction



I Tried Creatine for 30 days, here's what happened
177K views • 2 weeks ago



Workout Music for You: My Workout Music Youtube Channel: ...



Dr. Stacy Sims: Female-Specific Exercise & Nutrition for Health, Performance & Longevity
1.5M views • 8 months ago



In this episode, my guest is Dr. Stacy Sims, Ph.D., an exercise physiologist, nutrition scientist, and expert in female-specific ...
4K

35 chapters Dr. Stacy Sims | Sponsors: Maui Nui, Eight Sleep & Waking Up | Intermittent Fasting, Exercise & Wome... ▾



Creatine BEFORE & AFTER - *transformation*, how I grew a butt in the gym part 2, hamstrings & glutes
250K views • 3 months ago



Bonge Gumedé

creatine monohydrate #creatinebenefits #creatineexperience #hamstringsworkout #hamstringsandglutes #gluteworkout ...



Monohydrate Creatine | Reason Why I Started Taking Creatine | Loading Phase | Side Effects | ...

12 moments ▾

WHAT'S TRENDING IN WOMEN'S HEALTH?



Less Generic, More Case-Specific

Teen

Could we expect to see more products released catering to this demographic?

PRODUCTS TO WATCH



Adult

From **PCOS Support** to **"cycle syncing"**, expect to see brands focusing on these key use cases to capture white space in adult women's health.

Cycle Syncing

Cycle Syncing: How to work with your hormones in each phase of your cycle

Cycle syncing is a method that aligns your exercise, nutrition and overall lifestyle to the natural rhythm of your menstrual cycle, which can help to reduce symptoms, optimize performance and improve overall well-being.

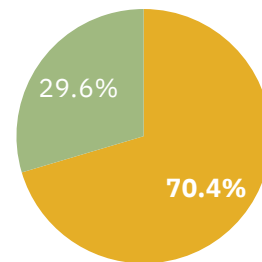


PRODUCTS TO WATCH

Mother

Top 5 brands dominate in share. Expect **more niche brands** to emerge and continue driving growth.

TOP 5 BRANDS
ALL OTHER



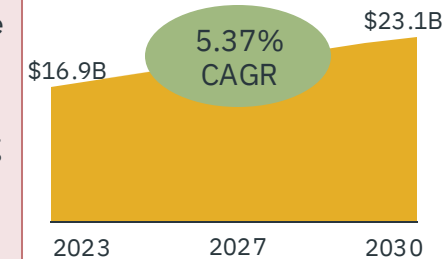
PRODUCTS TO WATCH



Mature

As the global menopause market grows, look for more innovation in the category, including **symptom specific** products.

Projected Sales of Menopause Products



PRODUCTS TO WATCH





DTC Brands will move to retail, causing surge

DTC brands moving into retail could inject growth into a slightly down category



From DTC to retail: How brands are migrating into big box stores

“In every category, more and more brands are getting their foot in the door and taking a once digital brand into a retail space. For eCommerce brands, moving between digital storefronts and physical retail shelves seems logical.”

-BankNotes by #Paid, 2022

Many of the top growing Women's Health brands are currently selling DTC. A few of these brands, like Bloom and Hers, have entered retail successfully, paving the way for **more DTC brands to grow in brick and mortar.**



Women's Health: Why has it taken so long?

Under-Represented

Features |

Sex and science: underrepresentation of women in early-stage clinical trials

Low female participation in Phase I trials is still persistent today, resulting in continuous sex bias in new drug development.

Women historically have been underrepresented in clinical research due to “complicated hormonal fluctuations.” Only since **1993** have women been required as clinical trial participants.

Under-Funded

THE **RAND** BLOG

Underfunding of Research in Women's Health Issues Is the Biggest Missed Opportunity in Health Care

COMMENTARY (Fortune)

Considering the history of underrepresentation, women's health clinical trials being grossly underfunded compared to “men's health” studies is not surprising.

(Poorly) Understood

The female problem: how male bias in medical trials ruined women's health

Centuries of female exclusion has meant women's diseases are often missed, misdiagnosed or remain a total mystery

Lack of knowledge on women's health has led to questions around how to even study the subject. This has caused the medical community to rely on unscientific stereotypes, such as “women should take half the dose of men due to being on average smaller.”



Putting the **Women** Back in Women's Health





Thank You!

For more information,
contact echan@spins.com
