



# Surviving and Thriving in Global Uncertainty: Supply Chains, Trade and Transparency

September 25, 2025



## American Herbal Products Association



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AHPA

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**Founded** 1982



**Members**

~400, including domestic and international companies that grow, process, manufacture and market herbs and herbal products



**Products**

Dietary supplements, teas, cosmetics, and other consumer goods



**Mission**

To promote the responsible and sustainable commerce of herbal products to ensure that consumers have informed access to a wide variety of safe herbal goods



**Vision**

For high quality herbal products to be readily accessible to and broadly used by consumers

**MARKET REPORT**

## US Sales of Herbal Supplements Increase 5.4% in 2024

*Healthy aging and foundational wellness drive consumer demand, with continued interest in cognitive and cardiovascular health and emerging focus on liver support and menopause*

By Tyler Smith,<sup>a</sup> Carly Lang,<sup>b</sup> and Erika Craft<sup>c</sup>

<sup>a</sup> American Botanical Council (Austin, Texas)  
<sup>b</sup> SPINS (Chicago, Illinois)  
<sup>c</sup> Nutrition Business Journal (Boulder, Colorado)

Total retail sales of herbal dietary supplements in the United States reached an estimated \$13.231 billion in 2024 — a 5.4% increase over 2023, according to *Nutrition Business Journal* (NBJ). This marks the highest annual sales on record and the second consecutive year of growth, following a brief decline in 2022 (Table 1). While the surge in demand during the peak of the COVID-19 pandemic has subsided, consumer interest in herbal products for a range of health goals — from emerging areas like liver health to those associated with healthy aging — continues to drive growth across market channels.

The sales data discussed in this report were provided by NBJ, a natural products industry publication of Informa's New Hope Network, and SPINS, a leading provider of retail consumer insights, analytics, and consulting for the natural products industry. NBJ supplied estimates of total annual sales of herbal supplements, as well as total sales in three market channels (mass market; natural, health food, and specialty; and direct sales) and sales by product type (single-herb supplements vs. combination formulas). SPINS provided sales data for the 40 top-selling herbal and fungal ingredients in the mainstream retail channel (i.e., the multi-tier channel, powered by the market research and technical company Circana) and the natural (now called "natural included") retail channel. Channel definitions are included in Table 2.

Among the three primary retail channels tracked by NBJ, direct-to-consumer segment once again led in overall sales, totaling \$7503 billion in 2024 — a 6.8% increase from the previous year. The mass market channel (which includes retailers, drugstores, and other large retailers) also experienced strong growth, rising 4.9% to reach \$2.607 billion. The natural, health food, and specialty channel saw a modest increase of 2.7%, totaling \$3.121 billion in 2024.

This report focuses on the top-selling ingredients in the mass market, mainstream, and natural included retail channels, highlighting those with significant sales increases and decreases in 2024. It also identifies several notable trends (both emerging and declining), offering context for the evolving herbal supplement market in the post-pandemic era.

\* Cannabidiol (CBD) is included in these data, despite the US Food and Drug Administration (FDA) not currently recognizing it as a legal dietary supplement ingredient.

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CELEBRATING 80+ YEARS



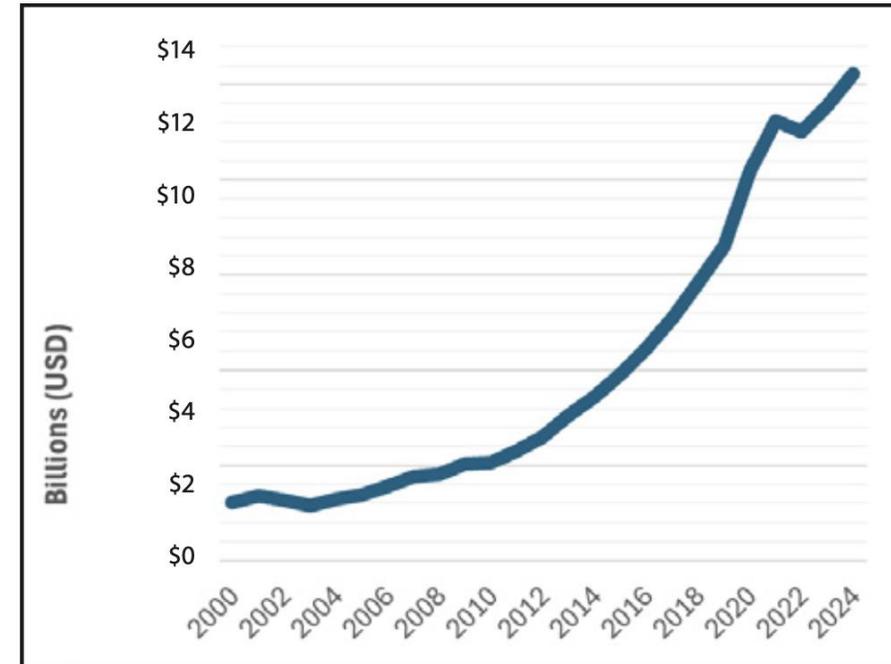
Sales figures in this report refer exclusively to US retail sales of dietary supplements in which the herbal or fungal ingredient (or derivative thereof) is the primary functional ingredient. The data exclude herbal teas, cosmetics, and other products that are not legally considered dietary supplements.\* All estimates reflect sales during the 52-week period ending December 31, 2024.

**MAINSTREAM CHANNEL**

**Top Sales: Psyllium**

In 2024, for the third consecutive year, psyllium (*Plantago ovata*, Plantaginaceae) maintained its position as the top-selling herbal supplement ingredient in mainstream retail outlets. Before that, in 2020 and 2021, elder (*Sambucus nigra* and *S. canadensis*, Viburnaceae) berry was the top-selling ingredient in this channel. Sales of psyllium-containing supplements in 2024 reached an estimated \$289.5 million, a 2.3% decrease from 2023. Since 2021, psyllium sales have remained relatively stable, with steady annual growth from 2021 to 2023. Unlike many ingredients that experienced sharp fluctuations during and after the pandemic, sales

**Figure 1. Total US Retail Sales of Herbal Supplements (2000–2024)**



Source: Nutrition Business Journal

**2024 Sales: \$13.231 billion (+5.4% vs 2023)**

Source: ABC/SPINS/NBJ HerbalGram Issue 144, 2025



April 2, 2025 – “Liberation Day”

**Set specific reciprocal tariff rates for 60 countries/territories (and 10% for non-listed countries) in effort to support American industry via trade policy**

### Some Fine Print

- Annex II to the original Executive Order did exempt ingredients including several vitamins and minerals (then included in Sec 232 investigation)
- Annex II did not contain any HTS (Harmonized Tariff Code) Chapters that are commonly used for importing herbs & botanical products
  - Zero Chapter 9 or 12 entries (whole herbs)
  - Zero Chapter 13 entries (extracts)
  - Zero Chapter 33 entries (essential oils)



White House Executive Order: September 5, 2025

## Potential Tariff Adjustments for Aligned Partners

### Annex III

**Protect Access to Wellness: Tariffs on Essential Herbs Threaten Americans' Health Choices**

The American Herbal Products Association (AHPA) urges policymakers to support tariff exemptions for essential herbs and herbal ingredients from plants that are grown in the United States. These herbs and ingredients are used in dietary supplements, conventional foods, and personal care products by millions of Americans to support their health and wellness.

**THE STAKES**

The United States is a major consumer of essential herbs and herbal ingredients. These products are used in a wide range of products, including dietary supplements, conventional foods, and personal care products. The United States is a major importer of these products, and the imposition of tariffs on these products would increase the cost of these products for consumers and reduce the availability of these products in the United States.

**KEY IMPORTED HERBS**

**Chamomile**

Chamomile is a popular herb used in teas, dietary supplements, and personal care products. It is primarily imported from France and Germany. Tariffs on chamomile would increase the cost of these products for consumers and reduce the availability of these products in the United States.

**Peppermint**

Peppermint is a popular herb used in teas, dietary supplements, and personal care products. It is primarily imported from France and Germany. Tariffs on peppermint would increase the cost of these products for consumers and reduce the availability of these products in the United States.

**Adaptogens**

Adaptogens are a group of herbs that are used in dietary supplements and personal care products. They are primarily imported from France and Germany. Tariffs on adaptogens would increase the cost of these products for consumers and reduce the availability of these products in the United States.

**OUR STAND**

AHPA supports continued access to essential herbs and herbal ingredients from the United States. We support the continuation of the current tariff exemptions for these products. We support the continuation of the current tariff exemptions for these products. We support the continuation of the current tariff exemptions for these products.

**TAKE ACTION**

Write your congressperson or senator and urge them to support the continuation of the current tariff exemptions for these products. Write your congressperson or senator and urge them to support the continuation of the current tariff exemptions for these products. Write your congressperson or senator and urge them to support the continuation of the current tariff exemptions for these products.

**CONTACT**

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**Protect American Manufacturing: Tariffs on Specialized Equipment Threaten Growth of U.S. Herbal Industry**

The American Herbal Products Association (AHPA) urges policymakers to support tariff exemptions for specialized manufacturing equipment essential to the domestic production of herbal and herbal ingredients. This equipment is used in the United States to produce these products, and the imposition of tariffs on this equipment would increase the cost of these products for consumers and reduce the availability of these products in the United States.

**THE STAKES FOR U.S. BUSINESSES**

The United States is a major producer of specialized manufacturing equipment. This equipment is used in a wide range of industries, including the pharmaceutical industry, the food processing industry, and the textile industry. The United States is a major exporter of this equipment, and the imposition of tariffs on this equipment would increase the cost of this equipment for consumers and reduce the availability of this equipment in the United States.

**ESSENTIAL EQUIPMENT**

**Dark Harvest**

Dark harvest is a specialized manufacturing process used in the production of certain herbs and herbal ingredients. It is primarily used in the production of certain herbs and herbal ingredients. Tariffs on dark harvest equipment would increase the cost of these products for consumers and reduce the availability of these products in the United States.

**High Speed Herbal Tea Packaging**

High speed herbal tea packaging is a specialized manufacturing process used in the production of certain herbs and herbal ingredients. It is primarily used in the production of certain herbs and herbal ingredients. Tariffs on high speed herbal tea packaging equipment would increase the cost of these products for consumers and reduce the availability of these products in the United States.

**Capable Filling Machines**

Capable filling machines are specialized manufacturing equipment used in the production of certain herbs and herbal ingredients. They are primarily used in the production of certain herbs and herbal ingredients. Tariffs on capable filling machines would increase the cost of these products for consumers and reduce the availability of these products in the United States.

**OUR STAND**

AHPA supports continued access to specialized manufacturing equipment essential to the domestic production of herbal and herbal ingredients. We support the continuation of the current tariff exemptions for this equipment. We support the continuation of the current tariff exemptions for this equipment. We support the continuation of the current tariff exemptions for this equipment.

**TAKE ACTION**

Write your congressperson or senator and urge them to support the continuation of the current tariff exemptions for this equipment. Write your congressperson or senator and urge them to support the continuation of the current tariff exemptions for this equipment. Write your congressperson or senator and urge them to support the continuation of the current tariff exemptions for this equipment.

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**Creates framework for reduced or zero tariffs for “unavailable natural resources” like Turmeric, Ginger, Green Tea and more**

### Some Fine Print

- Annex III isn't a blanket exemption, it must be negotiated as part of each country's individual trade deal.
- “Only items that are properly classified in the listed provisions of the HTSUS are potentially eligible to be exempted from the tariff action imposed by Executive Order 14257, as amended.”

**Not all herbs that qualify as “unavailable natural resources” are on Annex III (e.g. Ashwagandha)**

- Ongoing work with Commerce Dept, USTR & Individual Countries to expand list

### Potential Tariff Adjustments for Aligned Partners

#### Annex III

### What's Included In Annex III

#### Many Botanicals Included (not in Annex II)

- Dozens of HTS codes that are used to import from Chapter 9, 12, 13:
  - Green & Black Tea
  - Turmeric
  - Ginger
  - Cinnamon
  - Saffron
  - Psyllium Husk
  - and more...



Meet definition of “unavailable natural resource”  
– items that struggle to grow in US at quantities large enough to meet consumer demand

Potential Tariff Adjustments for Aligned Partners

Annex III

### What's Not included in Annex III

#### Missing Herbs & Preparations

While Annex III is a major step forward, it did not include:

- Extracts of many included herbs (e.g. Turmeric, Ginger, Black Pepper, Boswellia) that are imported as whole herbs
- Dozens of herbs that qualify as “unavailable natural resources” but aren’t listed:
  - Ashwagandha
  - Bacopa
  - Holy Basil
  - Many more



## What Countries Have Signed Trade Deals

- Multiple countries have signed bilateral trade deals with announced tariff rates



EU



UK



China



Japan



South Korea



Vietnam



Indonesia



Pakistan



Thailand

and others...

## What Countries Are Currently Negotiating

- Several countries remain in negotiations



India



Madagascar



South Africa



Canada



Mexico



Malaysia



Columbia



Bangladesh



Norway



Switzerland

and others...



### India and the United States are actively negotiating a long-term trade deal

#### India & US trade delegation evaluating including more herbs in their trade deal

- AHPA met with Dr. Ajay Kumar (Minster of Commerce) from Embassy of India in support of industry with request to include herbs in bilateral trade deal (those in Annex III and those not yet in)
  - He believes there is a viable path to doing so, but India [and US] requires input from industry to ensure complete list of "unavailable natural resources."
- AHPA has discussed these issues of unavailable natural resources with US Commerce Dept and USTR for past several months, now adding specific Annex III items to our discussions

**Retroactive refunds are possible after trade deals are signed. US-Japan deal of September 4<sup>th</sup> is one to watch closely for mechanics of this process and what qualifies.**



WSJ

A federal appeals court late Friday struck down the Trump administration's signature tariffs, finding that the president had gone too far in his use of emergency powers to rewrite U.S. trade policy.

The 7-4 ruling from the U.S. Court of Appeals for the Federal Circuit upheld [a lower-court decision](#) that undercuts a core tenet of President Trump's economic agenda. The majority found the president overstepped his authority under a 1977 law known as the International Emergency Economic Powers Act, or Ieepa.

August 29, 2025

### Trump Administration appealed IEEPA case to Supreme Court, Fall 2025

- Opening briefs are due by Sept. 19 and oral arguments are expected in the first week of November. This timeframe leaves open the possibility that the court could hand down a decision by the end of the year.
- If lower court decisions upheld, CBP will issue refunds
- Treasury Secretary Bessent on Meet the Press on September 7, hinting at monies would need to be refunded, but only about 50%.
  - Speculation is that the court may find valid the tariffs in place due to fentanyl crisis (Canada, Mexico, China) versus those given for non-fentanyl reasons

**NOTE: If overturned, Annex III items could get added to Section 232 investigation (national security) or Trump administration could deploy tariffs against Section 122 (trade imbalance) (limited to max of 15%, up to 150 days)**

# Thank you!



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