



The End of Pill Fatigue

Why delivery format has become a competitive advantage

Healthy Begins Here

**Every brand optimises
the formula.**

**Almost nobody
optimises how it's
delivered.**

The delivery format decides whether
you actually take them.



THE PROBLEM

The gap nobody prints on a label.

Swallowing difficulty is common, and it stops people taking what they've paid for.

40%

UP TO

of people have difficulty
swallowing capsules or pills

32%

SPLIT THEM

split tablets to get them
down. Another 17% crush
and dissolve them

8%

STOP

stop taking them altogether
rather than swallow it

Sources: [McCloskey et al., Br J Clin Pharmacol, 2022](#); [Spiegel Institut Mannheim for HERMES PHARMA, n=2,000](#)

THE PROBLEM

They've already told us.

Consumers want supplements that are easier to take, not just new ingredients.

66%

EASE OF USE

of U.S. participants say a dose form must be easy and comfortable to swallow if they're going to keep taking it

34%

MORE CHOICE

of supplement users say more format options would make supplements easier to take

20%

CONSISTENCY

of supplement users say more format options would help them take supplements more consistently

Sources: [Spiegel Institut Mannheim for HERMES PHARMA \(U.S. participants\)](#); [The Vitamin Shoppe 2025 Trend Report – Talker Research, n=2,000](#)

THE PROBLEM

Why easy wins.

People act when three things happen at once.

MOTIVATION

Claims, science, marketing, education.

Where nearly all the categories spend goes.

ABILITY

How easy the thing is to do.

For supplements, that's mostly the delivery format.

PROMPT

The cue that starts it.

On the counter, in the bag, by the bed.

22-41%

MORE DAYS ON TRACK

when a daily supplementation protocol drops from three doses to one

Every extra step costs adherence. People stick with what's easy to take.

Format is the part you control.

Sources: [Saini et al., Am J Manag Care, 2009 – 20 MEMS-monitored studies](#); [Fogg Behavior Model \(B=MAP\), Stanford Behavior Design Lab](#)

THE MARKET

Sales have moved. Habits haven't.

MACRO: WHAT THE MARKET BOUGHT

Non-pill formats now take 60% of U.S. sales.

24.6%

Gummies

18.7%

Powders

12.7%

Liquids

4.2%

Effervescent



MICRO: WHAT PEOPLE DO

But 65% of supplement users still take pills or capsules.

65%

take pills or capsules

Up to 40%

find them hard to swallow

8%

skip the dose instead

Sources: [NBJ 2026 Supplement Business Report](#), via [Nutraceuticals World](#); [The Vitamin Shoppe 2025 Trend Report](#); [McCloskey et al., 2022](#)

THE MARKET

Same problem. Different shelf.

One survey, 2,000 people, in the U.S. and Germany.

WHAT'S IDENTICAL

1 in 2

in the U.S. report difficulty swallowing tablets or capsules. In Germany it's more than 6 in 10.

8%

stop taking the product altogether rather than swallow it

WHAT ISN'T

90%+

of German consumers are already aware of effervescent, chewables and lozenges

1 in 6

U.S. consumers have tried orally disintegrating granules/orosoluble powders

Swallowing difficulty is the same in both countries. German consumers already know the alternatives, and most U.S. consumers haven't tried them.

Sources: [Spiegel Institut Mannheim for HERMES PHARMA – n=2,000, 1,000 U.S. and 1,000 Germany](#)

THE MARKET

Where the growth is.

The fastest-growing formats are the ones people chew or drink.

34.4%

YOY GROWTH

Soft chews, reaching \$253M in U.S. sales in 2025

95%

GROWTH, 52 WEEKS

Functional chewing gum, the fastest-growing format

7%

FORECAST CAGR

Global effervescent products, 2026-2033, reaching \$103.4B

Powders are up 11%, liquids 10% and chewables 9.5%. Ready-to-drink supplements now top \$7B in U.S. sales.

Sources: [SPINS, via NutraIngredients, January 2026](#); [Persistence Market Research, 2026](#); [NBJ 2026, via Nutraceuticals World](#)

Match the format to the moment.

Before choosing a format, ask when people take it and what they have to hand.

01

MORNING

At home, water's there,
and they're taking three
other things at once

**Effervescent
Powder**



02

ON-THE-GO

No water, no scoop,
no shaker, no thought

**Chewable
Fast-melt
Sprinkles**



03

POST-WORKOUT

Thirst-driven, higher
dose, wanted fast and
wanted cold

**Effervescent sachet
Clear-dissolving powder**



04

NIGHT-TIME

Often in bed, with no
water nearby. It has to take
no effort

**Fast-melt
Functional snack**



Sources: [Spiegel Institut Mannheim – 34% say a product must fit easily into daily life](#); [The Vitamin Shoppe 2025 Trend Report](#)

Format innovation without formulation science is just repackaging.

Creatine gummies are already proving it.



THE TRAP

The creatine gummy problem.

The right format, wrong formulation. Many of the products failed.

+59%

NEW PRODUCTS

more U.S. creatine gummy products in 12 months

4 of 6

FAILED

creatine gummies failed identity or potency tests in independent lab testing

50%

MATCHED LABEL

of brands in a separate NOW Foods test contained the creatine they claimed

Those four products sold 50,000 units on Amazon in the month before testing. People bought the format, and the products didn't contain what the label promised.

Sources: [NutraIngredients, January 2026](#); [SuppCo and NOW Foods testing, via Nutraceuticals World, 2024](#)

THE TRAP

And the shelf hasn't moved.

Gummy launches are up 59%, but the best-seller list is still powders and capsules.

91%

OF THE TOP 100

best-selling creatine products on Amazon
are still a powder or a capsule

78%	Powder
13%	Capsule
3%	Chewable tablet
3%	Gummy
2%	Tablet
1%	Liquid

Sources: [Amazon USA 'Best Seller' + 'Creatine', June 2025](#)

THE TRAP

Europe is a step behind.

Which, just this once, is worth something.

EUROPE

3%

of creatine products
are gummies

+50%

growth in creatine
gummy products, 12
months

U.S. & CANADA

7%

of creatine products
are gummies

+59%

growth in creatine
gummy products, 12
months

Europe is on the same curve, just later.

It still has time to skip the part where products fail lab tests.

Sources: [NutraIngredients, January 2026 – European and North American NPD analysis](#)



SOLUBILITY



STABILITY



TASTE & TEXTURE



DOSE SIZE

THE TRAP

Four things that break a format.

Each one is a formulation problem, and marketing can't fix any of them.

Sources: [Faulkner \(Vireo Systems\) and Candow, via Nutraceuticals World, 2026](#); [Limenh et al., Patient Preference and Adherence, 2024](#)

THE ANSWER

Our delivery technologies.

Each one is engineered so the formulation survives the format.



FZZR™

Effervescent granules

Dissolve, fizz or chew.



strw 

Nutrient-bead straw

Sip and supplement.
Zero prep required.



OptiClear™

Crystal-clear dissolving

Dissolves crystal clear,
with no cloudiness or
grit. Patent pending.

Other available formats

Chewables

Effervescent

Fast-melt powders

Functional sprinkles

Gummies

THE ANSWER

Ways to take it.

One ingredient, made to fit each occasion.



Effervescent
Chews, Powders,
Granules

Chewables
Tablets, Gummies

**Fast-Melt
Technology**

**Functional
Snacks**

**Optimised
Powders**

**Functional Foods,
Snacks, & Treats**

**Ingredient
Granules**

THE ANSWER

In market now.

MUSCLETECH™ EFF'N Series

FZZR



Energy and Hydration sachets launched exclusively at GNC. Dissolves in ~80 seconds. No shaker, no scoop.

GNC, U.S.

BULK™ Next-Gen Electrolytes

FZZR



Effervescent electrolyte sachets. Finalist, Most Innovative Partnership Award at Vitafoods Europe 2025.

DTC, UK / Europe

BIOSOURCE Hydration Fizzers

FZZR



Fast-acting effervescent sachets that for electrolyte replacement.

Retail, Australia

Three brands, three markets, all shipping with FZZR today.

THE TAKEAWAY

Where I think this goes.

THE PREDICTION

**The next format war
won't be about formats.
It'll be about
dose architecture.**

Which active, in which moment, in which form.
Designed as a sequence across someone's day, not
picked once as a house style.

**The adherence data says give people fewer doses.
The occasion data says meet more moments.**

WHAT I CAN'T ANSWER

- 01** Does switching format inside a brand build the habit, or break it?
- 02** Where does portfolio breadth stop helping and start confusing?
- 03** Who owns the occasion: the brand or the retailer?

THE TAKEAWAY

What wins from here.

You need all three. Miss one, and people abandon the product.

**Evidence-
backed
ingredients**

What's inside

+

**Formulation
science**

Whether it survives the
format

+

**Easy-to-take
formats**

How people take it

= A daily habit.

We're not in
the supplement
business.

We're in the
daily habit
business.





Healthy Begins Here

Partner with TSI Group

Let's make your next product something people reach for.



customersupport@tsigroupltd.com
www.tsigroupltd.com