



Practitioner
REPORT 2023



Contents

The practitioner channel

A comeback story	1
<i>Supplement industry sales by channel, 2022.....</i>	<i>1</i>
<i>Practitioner channel supplement sales and growth, 2018-2026e.....</i>	<i>2</i>
<i>Practitioner channel vs. total supplement sales and growth, 2018-2026e.....</i>	<i>3</i>
<i>U.S. practitioner supplement channel sales by product category, 2022.....</i>	<i>4</i>
<i>Total supplement industry sales by product category, 2022.....</i>	<i>5</i>
<i>Practitioner supplement sales by product category, 2018-2026e.....</i>	<i>6</i>
<i>Practitioner supplement growth by product category, 2018-2026e.....</i>	<i>6</i>
<i>Practitioner supplement market share by product category, 2018-2026e.....</i>	<i>6</i>
<i>U.S. practitioner channel supplement sales by condition, 2019.....</i>	<i>7</i>
<i>U.S. practitioner channel supplement sales by condition, 2022.....</i>	<i>7</i>
<i>U.S. practitioner channel supplement sales by practitioner type, 2019.....</i>	<i>8</i>
<i>U.S. practitioner channel supplement sales by practitioner type, 2022.....</i>	<i>9</i>
<i>Universe of U.S. practitioner channel supplement companies in 2022.....</i>	<i>10</i>

Practitioner survey

Open your mouth and say “Zoom”	11
<i>Offering of virtual visits.....</i>	<i>11</i>
<i>Virtual visits as percentage of total visits.....</i>	<i>12</i>
<i>Percent of practitioners seeing 80% or more of their patients via telehealth, by practitioner type.....</i>	<i>13</i>
<i>How virtual visits changed since pre-COVID (2019).....</i>	<i>14</i>
<i>Practitioner satisfaction with virtual visits.....</i>	<i>14</i>
<i>Usage of at-home testing kits.....</i>	<i>15</i>
<i>Types of at-home testing that practitioners actively recommend to patients.....</i>	<i>15</i>
New tools, new sales, new challenges	16
<i>Practitioner uses for at-home testing data.....</i>	<i>16</i>
<i>Importance of revenue from dietary supplement sales.....</i>	<i>17</i>
<i>Percentage of practitioners who feel the revenue from supplement sales is essential to their business, by practitioner type.....</i>	<i>17</i>
<i>Supplement sales as percent of total practice revenue.....</i>	<i>18</i>
<i>Leading hypotheses on why patients don’t make repeat purchases.....</i>	<i>18</i>
Point, click, compete.....	19
<i>How practitioners sell supplements to patients.....</i>	<i>19</i>
<i>Opinion on previously exclusive practitioner supplement brands now being sold through direct-to-consumer online.....</i>	<i>20</i>
<i>Opinion on previously exclusive practitioner supplement brands now being sold through direct-to-consumer online, by top practitioner types.....</i>	<i>21</i>
<i>What convinced practitioners to begin selling supplements.....</i>	<i>21</i>



In partnerships22
Brand features that encourage practitioners to sell or recommend products to patients..... 22
Where practitioners get their information about supplements..... 23

In (and on) the bottle24
Factors that are “very or extremely important” to practitioners when selling or recommending supplements..... 24

Consumer survey

Practitioners a valuable ally for supplement brands.....25
Criteria for supplement usage..... 25
Practitioners visited in the past year..... 26
Practitioners visited in the past year, by age group..... 27
Who typically initiates conversations about supplements?..... 28
Stated supplement knowledge among daily users 28
Frequency of doctor, nurse or nurse practitioner mentioning/recommending supplements when discussing patient’s health goals 29
Percentage of respondents who take supplements recommended by practitioner..... 29
Where respondents learn about supplements..... 30
Where respondents learn about supplements, by age group 30

Brands must build awareness31
Respondent knowledge of supplements..... 31
Difference in male and female supplement knowledge 32
Respondent knowledge of supplements, by age group..... 32

Patients getting personal.....33
Interest in ways of working with practitioners to guide supplement use..... 33
Have you ever done an at-home test from a company like 23AndMe or Ancestry? 34

Appendix: Practitioner survey

Top conditions for which practitioners recommend supplements 35
2023 practitioner supplement sales compared to 2022 36
2023 sales compared to pre-COVID levels (2019)..... 36
Top supplement recommenders 37
Percent of practitioners that dispense supplements, by practitioner type..... 37
Practitioner estimate of repeat patient supplement purchases..... 38
What could improve the safety, efficacy and quality of dietary supplements..... 38
Practitioner types 39
Practitioner relationship with supplements 39
Practitioner business model types..... 40
Do you believe DSHEA is adequate to ensure the safety, efficacy, and quality of dietary supplements?..... 40

Company profiles

Top 10 companies by 2022 U.S. dietary supplement sales	41
Designs for Health	42
Fullscript (Natural Partners, Emerson Ecologics)	44
Metagenics (Gryphon Investors)	45
Nestlé Health Science (Atrium Innovations, Pure Encapsulations, Douglas Labs, Genestra)	46
Ortho Molecular Products	48
Standard Process	49
Thorne HealthTech (L Catterton)	50
Xymogen (WholeScripts)	52

Acknowledgments and definitions

Acknowledgments	53
Research methodology	53
Copyright	54
Definitions	54