



Delivery Format

REPORT
2023



Contents

Executive overview

Top thoughts	1
A tale of two trajectories.....	1
<i>Supplement industry sales and growth, 2018-2026e</i>	<i>2</i>
<i>Supplement market share by category, 2022</i>	<i>3</i>
<i>Supplement market share by delivery format, 2022</i>	<i>3</i>
<i>Pill vs. Non-pill supplement sales, 2018-2026e</i>	<i>4</i>
<i>Supplement sales by delivery format, 2018-2026e</i>	<i>5</i>
<i>Supplement growth by delivery format, 2018-2026e</i>	<i>6</i>
<i>Supplement market share by delivery format, 2018-2026e</i>	<i>7</i>
Read more.....	7

Tablets, softgels, capsules, vegetarian capsules and pill packs

Conventionally conventional	8
<i>Capsule format sales and growth, 2020-2026e</i>	<i>8</i>
<i>Tablet format sales and growth, 2020-2026e.....</i>	<i>9</i>
<i>Softgel format sales and growth, 2018-2026e</i>	<i>10</i>
<i>Vegetarian capsules format sales and growth, 2018-2026e.....</i>	<i>11</i>
<i>Pill pack sales and growth, 2018-2026e.....</i>	<i>11</i>
Market manifestations: Tablets, softgels, capsules, vegetarian capsules and pill packs	12
Gaia Herbs Liver Cleanse liquid phytocaps	
First Person Sunbeam caps	
Read more.....	12

Gummies and chewables

Chews wisely.....	13
<i>Gummy format sales and growth, 2018-2026e.....</i>	<i>13</i>
<i>Chewable format sales and growth, 2018-2026e.....</i>	<i>14</i>
Market manifestations: Gummies and chewables	15
Goli Pre+post+probiotics	
Hydroxycut Weight Loss + Women	
humanN SuperBeets Heart Chews	
Read more.....	15

Powders

In the mix	16
<i>Powder format sales and growth, 2018-2026e</i>	16

Market manifestations: Powders.....	17
--	-----------

Gainful

Solaray's Mycrobiome Prebiotic Powder

Athletic Greens

Shots and liquids

Sips ahoy.....	18
-----------------------	-----------

Shot format sales and growth, 2018-2026e..... 18

Liquid format sales and growth, 2018-2026e..... 19

Market manifestations: Shots and liquids.....	20
--	-----------

MaryRuth's Women's 40+ Multi Liposomal multivitamin

Aurora Nutrascience Liposomal Vitamin C

All others

Novelty and nutrition.....	21
-----------------------------------	-----------

Effervescent format sales and growth, 2018-2026e 21

Quick dissolve format sales and growth, 2018-2026e 22

Lozenge format sales and growth, 2018-2026e..... 23

Lollipop format sales and growth, 2018-2026e 24

All other format sales and growth, 2018-2026e 24

Market manifestations: All others	25
--	-----------

Emergen-C Orange Support Immunity C crystals

Shaklee Essential MultiV Drink

Twinlab D3 1000 + K2 Dots

Consumer survey

Top thoughts	26
---------------------------	-----------

Pills and gummies dominate	26
---	-----------

Nearly two-thirds of frequent supplement users take two to four different products..... 27

41% of frequent supplement users that prefer capsules prefer them because they're easy to swallow..... 27

General sentiments of frequent supplement users 28

How frequent supplement users feel about pills..... 28

General health, immunity and nutritional gaps are top reasons for frequent supplement users 29

Pills still dominate among frequent supplement users..... 29

Gummies are most preferred single format, but combined pills lead overall 30

The largest percentage of consumers who prefer pills over other formats do so because they're easy to swallow..... 30

Gummies up and coming 31

<i>Gummies were first supplement for nearly half of frequent supplement users</i>	31
<i>How frequent supplement users feel about gummies</i>	32
<i>Gen Z over indexes on gummy preference while boomers over index on tablets.....</i>	32
<i>Almost one third of frequent supplement users who take 2-4 different products prefer gummies.....</i>	33
<i>Among frequent supplement users, nearly half of those who prefer gummies try to avoid or limit sugar in supplements.....</i>	33
<i>The largest percentage of consumers who prefer gummies over other formats do so because of taste</i>	34

Doing their own research 35

<i>25% of Gen Z frequent supplement users say they prefer supplements that have enjoyable taste</i>	35
<i>Millennials pay less attention to pricing when compared to other generations</i>	36
<i>30% of Millennial frequent supplement users say since COVID-19 they've started taking more supplements.....</i>	36
<i>58% of frequent supplement users that prefer gummies consider themselves knowledgeable about dietary supplements.....</i>	37
<i>Gummy preferred users rank almost as high as capsule preferred users on seeking science-backed supplements</i>	37
<i>Frequent supplement users who prefer capsules tend to do more research before buying a supplement</i>	37
<i>56% of millennials said they pay close attention to ingredient labels, the highest percentage compared to other generations.</i> 38	38
<i>Within frequent supplement users who prefer a gummy format, 48% said they pay close attention to ingredient labels.....</i>	38
<i>Within frequent supplement users who prefer a powder format, 93% said they always check the label for dosage.....</i>	38
<i>Confidence in knowledge of dietary supplements varies not just by format, but also by generation</i>	39
<i>Reason for format preference, by generation</i>	39
<i>More than a third (35%) of frequent supplement users started taking supplements within the last two years.....</i>	40
<i>Vitamins are top category taken by frequent supplement users</i>	40
<i>One third of frequent supplement users rank easy to swallow as key attribute</i>	41
<i>Two thirds of frequent supplement users always pay attention to dosage.....</i>	41
<i>59% of frequent supplement users say COVID-19 did not change their supplement usage</i>	42
<i>Nearly one-third of frequent supplement users would purchase a different format for the first time based on a sale or low price.....</i>	42
<i>Most frequent supplement users consider themselves knowledgeable about nutrition and the benefits of dietary supplements</i>	43

Related content

Taste matters 44

For non-pill supplements, flavor can make or break a product's success

Packing it up 48

Personalized nutrition has created more awareness and more capacity for pill packs, but the length of the runway is unclear

Gummed up 50

Testing behind damning gummy headlines was not fit to task

Acknowledgments and definitions

Acknowledgments.....	52
Research methodology	52
Copyright.....	53
Definitions	53

COVER: YULIA USHAKOVA/SHUTTERSTOCK.COM

The NBJ model pulls from myriad data sources, outlined in the methodology at the end of this report. Critical to our outputs is our partnership with SPINS, which powers our retail data and understanding and whose Amazon data supports our e-commerce projections.

Powered by

