



NBJ[®]



**Supplement
Business
REPORT 2023**



New Hope
NETWORK™

Contents

Executive overview

Top thoughts 1

Moving targets and adjusted expectations..... 1

\$61.06 Billion supplement industry by product category, 20222

Supplement industry sales and growth, 2018-2026e3

Supplement industry sales and growth, current vs. Pre-COVID, 2018-2024e.....4

Supplement industry sales and growth, current vs. Pre-COVID, 2018-2024e4

Natural and organic products industry sales vs. Supplement sales, 2018-2026e.....5

Supplement industry sales by product category, 2018-2026e5

Supplement industry growth by product category, 2018-2026e5

Channeling change 6

Supplement industry added dollars by product category, 2018-2026e.....6

Supplement industry market share by product category, 2018-2026e6

\$288.17 Billion natural and organic products industry by channel, 2022.....7

Natural and organic products industry sales by channel, 2018-2026e8

Natural and organic products industry growth by channel, 2018-2026e8

Natural and organic products industry market share by channel, 2018-2026e8

\$61.06 Billion supplement sales by channel, 20229

Supplement industry sales by channel, 2018-2026e9

Supplement industry growth by channel, 2018-2026e 10

Supplement industry added dollars by channel, 2018-2026e..... 10

Supplement industry market share by channel, 2018-2026e 10

Read more..... 11

Vitamins

Top thoughts 12

The bigger they fall 12

Vitamin growth vs. Total supplement growth, 2018-2026e..... 13

Vitamin sales and growth vs. Total supplement sales and growth, 2018-2026e 14

Vitamin sales and growth, 2018-2026e 14

\$18.2 Billion vitamin sales by product category, 2022..... 15

Vitamin sales by product category, 2018-2026e..... 15

Vitamin growth by product category, 2018-2026e..... 16

Vitamin added dollars by product category, 2018-2026e 16

Vitamin market share by product category, 2018-2026e..... 16

Vitamin sales by channel, 2018-2026e..... 17

Vitamin growth by channel, 2018-2026e..... 17

Vitamin added dollars by channel, 2018-2026e..... 17



<i>Vitamin market share by channel, 2018-2026e</i>	18
<i>Multivitamin sales and growth, 2018-2026e</i>	18
Looking for growth	19
<i>\$8.23 Billion multivitamin sales by channel, 2022</i>	19
<i>Vitamin A sales and growth, 2018-2026e</i>	20
<i>\$615 Million vitamin A sales by channel, 2022</i>	21
<i>B vitamins sales and growth, 2018-2026e</i>	22
<i>\$2.63 Billion B vitamins sales by channel, 2022</i>	22
<i>Vitamin C sales and growth, 2018-2026e</i>	23
<i>\$1.79 Billion vitamin C sales by channel, 2022</i>	23
<i>Vitamin D sales and growth, 2018-2026e</i>	24
<i>\$1.65 Billion vitamin D sales by channel, 2022</i>	24
Market manifestations: Vitamins	25
Shaklee Essential MultiV Drink	
Aurora Nutrascience Liposomal Vitamin C	
Twinlab D3 1000 + K2 Dots	
Read more	25
Minerals	
Top thoughts	26
Not so far to fall	26
<i>Mineral growth vs. Total supplement growth, 2018-2026e</i>	27
<i>Mineral sales vs. Total supplement sales, 2018-2026e</i>	28
<i>Mineral sales and growth, 2018-2026e</i>	28
<i>\$3.76 Billion mineral sales by product category, 2022</i>	29
<i>Mineral sales by product category, 2018-2026e</i>	29
<i>Mineral growth by product category, 2018-2026e</i>	30
<i>Mineral added dollars by product category, 2018-2026e</i>	30
<i>Mineral market share by product category, 2018-2026e</i>	31
Channel guided	32
<i>\$3.76 Billion mineral sales by channel, 2022</i>	32
<i>Mineral sales by channel, 2018-2026e</i>	33
<i>Mineral growth by channel, 2018-2026e</i>	33
<i>Mineral added dollars by channel, 2018-2026e</i>	34
<i>Mineral market share by channel, 2018-2026e</i>	34
<i>Calcium sales and growth, 2018-2026e</i>	35
<i>\$1.12 Billion calcium sales by channel, 2022</i>	35
<i>Magnesium sales and growth, 2018-2026e</i>	36
<i>\$1.44 Billion magnesium sales by channel, 2022</i>	36
<i>Iron sales and growth, 2018-2026e</i>	37



<i>\$438 Million iron sales by channel, 2022</i>	37
<i>Selenium sales and growth, 2018-2026e</i>	38
<i>\$117 Million selenium sales by channel, 2022</i>	38
<i>Zinc sales and growth, 2018-2026e</i>	39
<i>\$341 Million zinc sales by channel, 2022</i>	39
Market manifestations: Minerals	40
NBPure Mag07	
Thorne Trace Minerals	
Hammer Nutrition Endurolytes Fizz	
Herbs and botanicals	
Top thoughts	41
Skidding into the turn	41
<i>Herb and botanical growth vs. Total supplement growth, 2018-2026e</i>	42
<i>Single vs. Combination herb and botanical sales, 2018-2026e</i>	43
<i>Single vs. Combination herb and botanical growth, 2018-2026e</i>	43
<i>Single vs. Combination herb and botanical market share, 2018-2026e</i>	43
<i>Herb and botanical sales and growth vs. Total supplement sales and growth, 2018-2026e</i>	44
<i>Herb and botanical sales and growth, 2018-2026e</i>	44
Digital downslope	45
<i>\$12.1 Billion herb and botanical sales by channel, 2022</i>	45
<i>Herb and botanical sales by channel, 2018-2026e</i>	46
<i>Herb and botanical growth by channel, 2018-2026e</i>	47
<i>Herb and botanical added dollars by channel, 2018-2026e</i>	47
<i>Herb and botanical market share by channel, 2018-2026e</i>	47
<i>Ashwagandha sales and growth, 2018-2026e</i>	48
<i>Elderberry sales and growth, 2018-2026e</i>	48
<i>Hemp CBD sales and growth, 2018-2026e</i>	49
<i>Mushroom sales and growth, 2018-2026e</i>	49
<i>Turmeric sales and growth, 2018-2026e</i>	50
Market manifestations: Herbs and botanicals	51
First Person	
Athletic Greens	
Sempera Organics	
Banyan Botanicals Focus	
Garden of Life mykind Organics Extra-Strength Turmeric Tablets	
humanN SuperBeets Heart Chews	
Read more	51

Sports nutrition and meal supplements

Top thoughts	52
Back in action	52
<i>Sports nutrition supplement growth vs. Total supplement growth, 2018-2026e</i>	53
<i>Sports nutrition supplement sales and growth vs. Total supplement sales and growth, 2018-2026e</i>	54
<i>Sports nutrition supplement sales and growth, 2018-2026e</i>	54
Sports nutrition in the sales channels, the bitter and the sweet	55
<i>\$8.96 Billion sports nutrition supplement sales by product category, 2022</i>	55
<i>Sports nutrition supplement sales by product category, 2018-2026e</i>	56
<i>Sports nutrition supplement growth by product category, 2018-2026e</i>	56
<i>Sports nutrition supplement added dollars by product category, 2018-2026e</i>	57
<i>Sports nutrition supplement market share by product category, 2018-2026e</i>	57
<i>\$8.96 Billion sports nutrition supplement sales by channel, 2022</i>	58
<i>Sports nutrition supplement sales by channel, 2018-2026e</i>	58
<i>Sports nutrition supplement growth by channel, 2018-2026e</i>	59
<i>Sports nutrition supplement added dollars by channel, 2018-2026e</i>	59
<i>Sports nutrition supplement market share by channel, 2018-2026e</i>	59
<i>Functional sports beverage sales and growth, 2018-2026e</i>	60
<i>Functional sports beverage sales by channel, 2022</i>	60
<i>Sports nutrition pill sales and growth, 2018-2026e</i>	61
<i>Sports nutrition pill sales by channel, 2022</i>	61
<i>Sports nutrition powder sales and growth, 2018-2026e</i>	62
<i>Sports nutrition powder sales by channel, 2022</i>	62
Market manifestations: Sports nutrition	63
Zhou Nutrition Plant Complete	
Equate Plant-based Protein Supplement	
Olly Recover Gummy Rings	
Shaking up the shakes	64
<i>Meal supplement growth vs. Total supplement growth, 2018-2026e</i>	64
<i>Meal supplement sales and growth vs. Total supplement sales and growth, 2018-2026e</i>	65
<i>Meal supplement sales and growth, 2018-2026e</i>	65
Meal supplement, a story of aisles	66
<i>\$6.39 Billion meal supplement sales by channel, 2022</i>	66
<i>Meal supplement sales by channel, 2018-2026e</i>	67
<i>Meal supplement growth by channel, 2018-2026e</i>	67
<i>Meal supplement added dollars by channel, 2018-2026e</i>	68
<i>Meal supplement market share by channel, 2018-2026e</i>	68

Market manifestations: Meal supplements.....69
 Celebrate Chicken Soup Protein Powder
 Ka'Chava
 ProLon Fasting Shake
Read more69

Specialty supplements

Top thoughts70
Plots, setting, story70
Specialty supplement growth vs. Total supplement growth, 2018-2026e..... 71
Specialty supplement vs. Total supplement sales and growth, 2018-2026e..... 72
Specialty supplement sales and growth, 2018-2026e..... 72
Shopping by specialty73
\$11.58 Billion specialty supplement sales by product category, 2022 73
Specialty supplement sales by product category, 2018-2026e 74
Specialty supplement growth by product category, 2018-2026e..... 75
Specialty supplement added dollars by product category, 2018-2026e..... 75
Specialty supplement market share by product category, 2018-2026e..... 76
\$11.57 Billion specialty supplement sales by channel, 2022 76
Specialty supplement sales by channel, 2018-2026e 77
Specialty supplement growth by channel, 2018-2026e 77
Specialty supplement market share by channel, 2018-2026e..... 78
Specialty supplement added dollars by channel, 2018-2026e..... 78
Pre- Pro- and Synbiotic sales and growth, 2018-2026e 79
Pre- Pro- and Synbiotic sales by channel, 2022..... 79
Fish and animal oil sales and growth, 2018-2026e 80
Fish and animal oil sales by channel, 2022..... 80
Collagen sales and growth, 2018-2026e 81
Collagen sales by channel, 2022..... 81
Melatonin sales and growth, 2018-2026e..... 82
Melatonin sales by channel, 2022 82
Market manifestations: Specialty supplements.....83
 Fatty15
 Renew Life Womens Care Gummy
 Jarrow Formulas SAME 400
Read more.....83

Sales channels

Top thoughts	84
Warning signs come due.....	84
<i>\$61.05 Billion supplement industry by channel, 2022.....</i>	85
<i>Supplement industry sales by channel, 2018-2026e</i>	85
<i>Supplement industry growth by channel, 2018-2026e</i>	86
<i>Supplement industry added dollars by channel, 2018-2026e.....</i>	86
<i>Supplement industry market share by channel, 2018-2026e</i>	86
<i>Natural and specialty retail channel supplement sales and growth, 2018-2026e</i>	87
<i>Natural and specialty retail channel growth vs. Total supplement growth, 2018-2026e</i>	87
<i>Natural and specialty retail channel market share by product category, 2018-2026e.....</i>	88
<i>Natural and specialty retail channel sales by product category, 2018-2026e.....</i>	88
<i>Natural and specialty retail channel growth by product category, 2018-2026e.....</i>	88
Mass on the move	89
<i>Mass market retail channel supplement sales and growth, 2018-2026e.....</i>	89
<i>Mass market retail channel growth vs. Total supplement growth, 2018-2026e.....</i>	90
<i>Mass market retail channel sales by product category, 2018-2026e.....</i>	91
<i>Mass market retail channel growth by product category, 2018-2026e.....</i>	91
<i>Mass market retail channel market share by product category, 2018-2026e.....</i>	91
Networking negatives.....	92
<i>MLM.Network marketing channel supplement sales and growth, 2018-2026e.....</i>	92
<i>MLM.Network marketing channel growth vs. Total supplement growth, 2018-2026e</i>	93
<i>MLM.Network marketing channel sales by product category, 2018-2026e</i>	93
<i>MLM.Network marketing channel growth by product category, 2018-2026e</i>	94
<i>MLM.Network marketing channel market share by product category, 2018-2026e</i>	94
<i>Mail order, DRTV and radio channel supplement sales and growth, 2018-2026e.....</i>	95
<i>Mail order, DRTV and radio channel growth vs. Total supplement growth, 2018-2026e.....</i>	95
<i>Mail order, DRTV and radio channel sales by product category, 2018-2026e</i>	96
<i>Mail order, DRTV and radio channel growth by product category, 2018-2026e</i>	96
<i>Mail order, DRTV and radio channel market share by product category, 2018-2026e</i>	96
Back in form.....	97
<i>Practitioner channel supplement sales and growth, 2018-2026e.....</i>	97
<i>Practitioner channel growth vs. Total supplement growth, 2018-2026e.....</i>	98
<i>Practitioner channel sales by product category, 2018-2026e</i>	98
<i>Practitioner channel growth by product category, 2018-2026e.....</i>	99
<i>Practitioner channel market share by product category, 2018-2026e.....</i>	99
Juggernaut.....	100
<i>E-Commerce channel supplement sales and growth, 2018-2026e</i>	100
<i>E-Commerce channel growth vs. Total supplement growth, 2018-2026e.....</i>	101



E-Commerce channel sales by product category, 2018-2026e..... 102
E-Commerce channel growth by product category, 2018-2026e..... 102
E-Commerce channel market share by product category, 2018-2026e..... 102

Read more..... 103

Company profiles

Top 50 companies by 2022 U.S. dietary supplement sales 104

Abbott Nutrition 106

Adaptive Health 108

Alticor (Amway) 110

Ancient Nutrition 112

Bausch + Lomb 114

Bayer 116

Better Being Co. 118

Church & Dwight..... 120

Clorox 122

Doctor's Best..... 124

DSM 125

Gaia Herbs..... 127

Glanbia 129

GNC..... 131

Goli Nutrition..... 133

Gryphon Investors (Metagenics)..... 135

Haleon (formerly GSK) 137

Herbalife Nutrition..... 139

HUM Nutrition..... 141

HumanN 143

International Vitamin Corporation 144

Iovate Health Sciences International..... 146

Irwin Naturals..... 148

Johnson & Johnson (incl. Zarbee's) 150

Kikkoman (incl. Country Life, Allergy Research Group) 152

Life Extension 154

MaryRuth Organics..... 156

Natural Factors 158

Nestlé Health Science	160
NetWell Nutrition.....	163
Nordic Naturals.....	165
NOW Health Group.....	167
Nu Skin Enterprises.....	169
Pharmavite.....	171
Physician’s Choice.....	173
Procter & Gamble	174
Reckitt.....	176
Ritual	178
Schwabe Group.....	180
Sports Research.....	182
Swanson.....	183
Thorne HealthTech (Thorne Research Inc.)	185
Unilever	187
USANA.....	189
Vytalogy Wellness (incl. Jarrow Formulas, Natrol).....	191

Related Content

Executive overview

From scrambling to scrambled	193
Innovation unleashed	195
Packing it up	198
Home work.....	200
No ‘Plan B’	202
Going viral	205
Russian supplement business seen shifting to Asian suppliers	208
By women, for women	211
Optimize or prevent?	215
Source of contention	219

Vitamins and minerals

K2 on the brain.....	223
----------------------	-----

Herbs and botanicals

Shrooms still booming	226
Hemp hesitation.....	229

Sports nutrition and meal supplements

The last macro standing232
 T time.....234
 The return of the miracle drug.....236
 Fast tracking240
 Order in the disorder.....243

Specialty supplements

In the mood246
 Microbiome’s golden years.....248
 Gut instincts.....250
 Microbiome market is skin deep254

Sales channels

The producer perspective258
 Coexist.....260
 Hip to be there263
 Joining the club.....265
 Direct sellers search for new footing270
 A matter of trust.....273

Acknowledgments and definitions

Acknowledgments.....277
 Research methodology277
 Copyright.....278
 Definitions278

COVER: ADRICALINI2/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.

