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NETWORK™

State of Natural

INDUSTRY SNAPSHOT



Data and insights across the natural and organic product market,
with sales and growth forecasts through 2025

SPRING 2025

Natural[®]
Products
EXPO WEST[®]

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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.



Sustainable market growth

It is the best of times and the most uncertain of times. The natural products industry continues its impressive trajectory, riding high on rising consumer interest in preventive health and personalized nutrition and increased accessibility through mainstream retailers and online platforms. Sales have more than tripled since 2007, from \$97 billion to more than \$325 billion in 2024. *Nutrition Business Journal (NBJ)* projects growth will remain steady at around 5% and sales will climb to \$343 billion in 2025—but there are headwinds. Inflation is impacting consumer purchasing, and consumer confidence in the Trump administration's economic and health policies has wavered since the president took office.

➤➤ HEALTHY HUNGER

Food and Beverage dominates the industry with 72.2% of market share, accounting for more than three times as many sales dollars as Supplements and more than 10 times as many as Personal Care.

➤➤ DIGITAL RISING

Mass Market is far and away the dominant channel for natural products, accounting for \$198 billion in 2024. While E-commerce is growing the fastest, with around 9% growth in 2024 and 2025, it is projected to reach only \$33 billion in 2025—still less than half of Natural and Specialty.

➤➤ STEADY GROWTH

Personal Care grew slightly faster than Food and Beverage and Supplements in 2024, but that growth is settling down to be roughly 5%—on par with the rest of the industry—in 2025.

➤➤ FAITH FADING

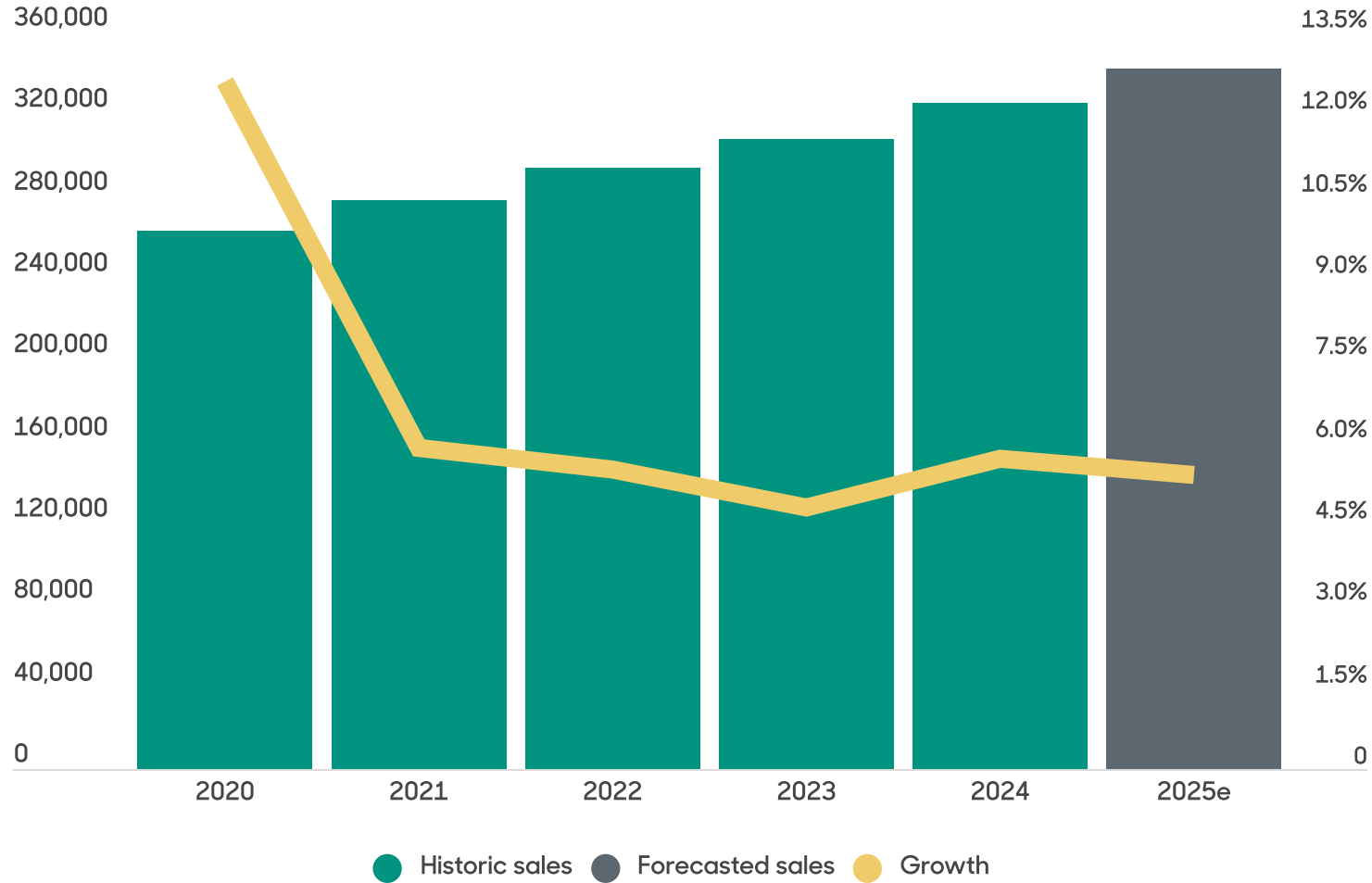
NBJ surveys indicate a decline in public confidence in the Trump administration and Robert F. Kennedy Jr. Americans who believe the Trump administration's priorities will benefit the economy dropped from 70% in January to 55% in April, while those who think Kennedy's influence will improve health and wellness policy fell 69% to 57% in the same period.



TRENDING: Data driven

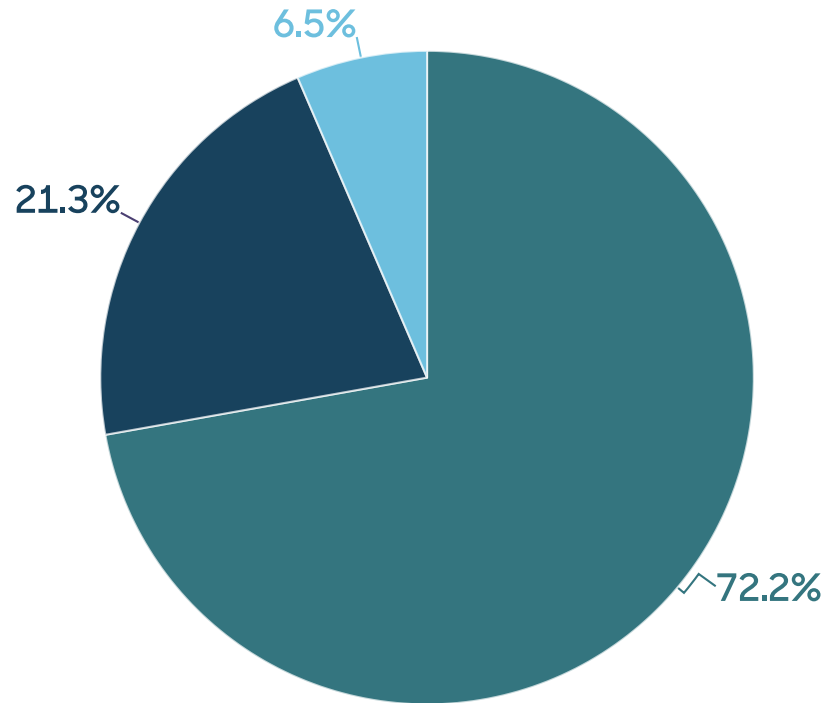
The natural products industry is uniquely positioned to capitalize on the growing consumer movement toward proactive health care and healthspan optimization. As AI-powered health tools (already used by 34% of consumers) and wearable technology (utilized by more than half of consumers) become mainstream, these platforms are directly influencing purchasing decisions across nutrition and personal care. This creates unprecedented opportunities for brands to develop targeted products and formulations aligned with real-time data and establish trusted partnerships with consumers who are actively managing their healthspan. Brands that can offer personalized solutions as soon as biometric indicators suggest intervention will position themselves as essential components of consumers' data-driven wellness strategies.

Natural and organic product industry sales and growth, 2020-2025e



Source: Nutrition Business Journal (\$mil, consumer sales)

Natural and organic product industry sales by category, 2024



- Natural, Organic and Functional Food and Beverage
- Supplements
- Natural and Organic Personal Care

Source: Nutrition Business Journal

Natural and organic product industry sales by category, 2020-2025e

	2020	2021	2022	2023	2024	2025e
Dietary Supplements	57,519	61,798	63,035	65,869	69,281	73,128
Natural, Organic and Functional Food and Beverage	188,471	199,080	212,232	222,078	234,844	247,311
Natural and Organic Personal Care	16,634	17,359	18,389	19,764	21,079	22,265
Natural and Organic Products Industry	262,624	278,237	293,656	307,711	325,205	342,705

Natural and organic product industry growth by category, 2020-2025e

	2020	2021	2022	2023	2024	2025e
Dietary Supplements	16.7%	7.4%	2.0%	4.5%	5.2%	5.6%
Natural, Organic and Functional Food and Beverage	12.1%	5.6%	6.6%	4.6%	5.7%	5.3%
Natural and Organic Personal Care	5.0%	4.4%	5.9%	7.5%	6.7%	5.6%
Natural and Organic Products Industry	12.6%	5.9%	5.5%	4.8%	5.7%	5.4%

Source: Nutrition Business Journal (\$mil, consumer sales)

Natural and organic product industry market share by category, 2020-2025e

	2020	2021	2022	2023	2024	2025e
Dietary Supplements	21.9%	22.2%	21.5%	21.4%	21.3%	21.3%
Natural, Organic and Functional Food and Beverage	71.8%	71.6%	72.3%	72.2%	72.2%	72.2%
Natural and Organic Personal Care	6.3%	6.2%	6.3%	6.4%	6.5%	6.5%
Natural and Organic Products Industry	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Natural and organic product industry sales by channel, 2020-2025e

	2020	2021	2022	2023	2024	2025e
E-Commerce	20,977	24,660	25,937	27,927	30,403	33,071
Mail order, DRTV and radio	5,823	5,957	5,946	6,118	6,315	6,519
Mass market retail	156,655	166,526	179,094	188,139	198,541	209,276
MLM-Network marketing	12,785	13,388	12,929	12,939	13,044	13,172
Natural and specialty retail	59,456	60,119	61,721	64,048	67,801	70,976
Practitioner	6,927	7,586	8,030	8,541	9,100	9,690
Total	262,624	278,237	293,656	307,711	325,205	342,705

Source: Nutrition Business Journal (\$mil, consumer sales)

Natural and organic product industry growth by channel, 2020-2025e

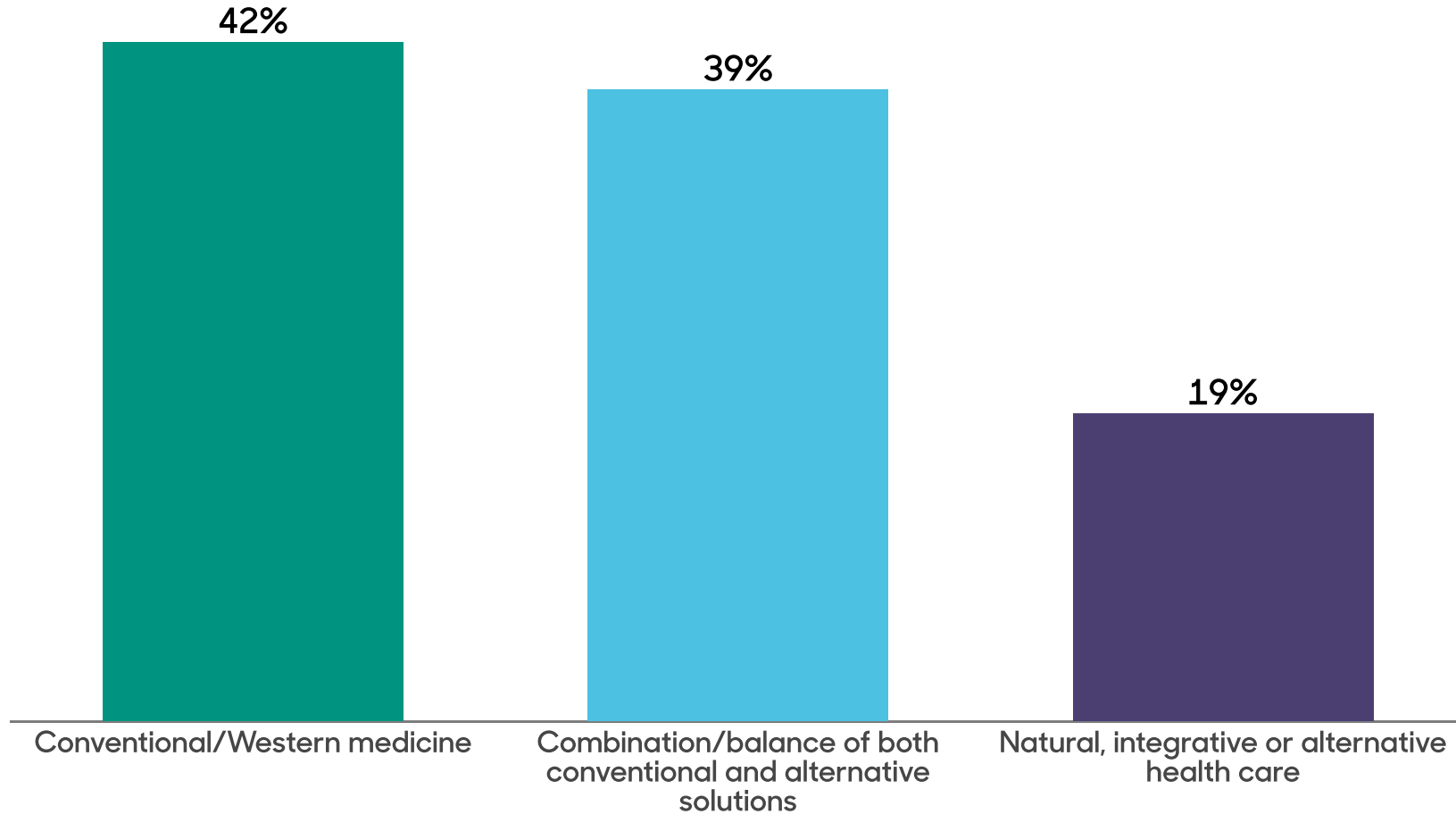
	2020	2021	2022	2023	2024	2025e
E-Commerce	63.1%	17.6%	5.2%	7.7%	8.9%	8.8%
Mail order, DRTV and radio	5.6%	2.3%	-0.2%	2.9%	3.2%	3.2%
Mass market retail	13.1%	6.3%	7.5%	5.1%	5.5%	5.4%
MLM-Network marketing	4.1%	4.7%	-3.4%	0.1%	0.8%	1.0%
Natural and specialty retail	4.3%	1.1%	2.7%	3.8%	5.9%	4.7%
Practitioner	-2.3%	9.5%	5.9%	6.4%	6.5%	6.5%
Total	12.6%	5.9%	5.5%	4.8%	5.7%	5.4%

Natural and organic product industry market share by channel, 2020-2025e

	2020	2021	2022	2023	2024	2025e
E-Commerce	8.0%	8.9%	8.8%	9.1%	9.3%	9.6%
Mail order, DRTV and radio	2.2%	2.1%	2.0%	2.0%	1.9%	1.9%
Mass market retail	59.7%	59.9%	61.0%	61.1%	61.1%	61.1%
MLM-Network marketing	4.9%	4.8%	4.4%	4.2%	4.0%	3.8%
Natural and specialty retail	22.6%	21.6%	21.0%	20.8%	20.8%	20.7%
Practitioner	2.6%	2.7%	2.7%	2.8%	2.8%	2.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Nutrition Business Journal

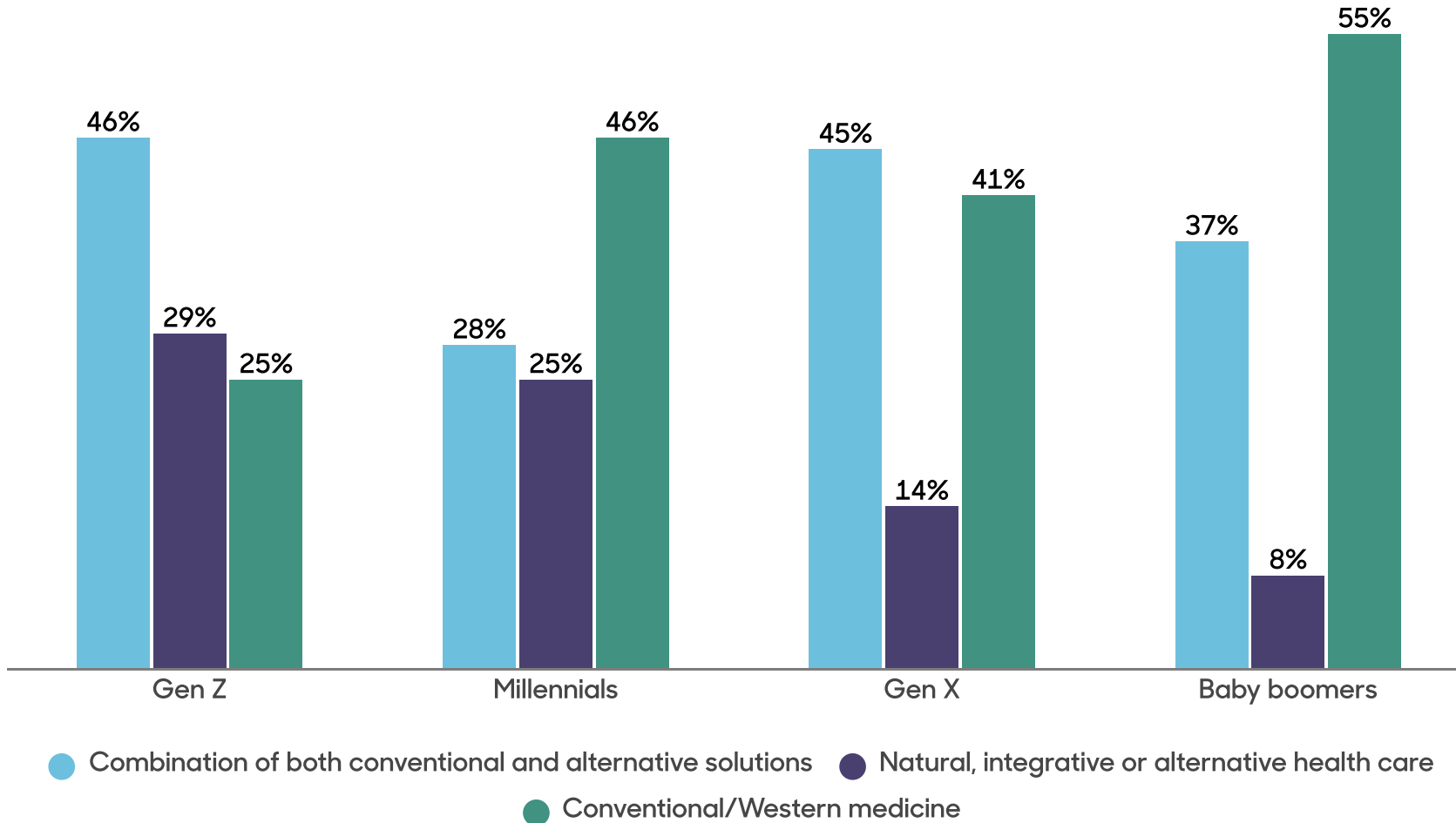
Health solutions consumers turn to first



Source: *Nutrition Business Journal* surveys targeting average consumers, aged 19-75. Completed February 2025; N=1,010; powered by the Suzy online platform.

Question: "When seeking solutions for your health, which approach do you typically turn to first?"

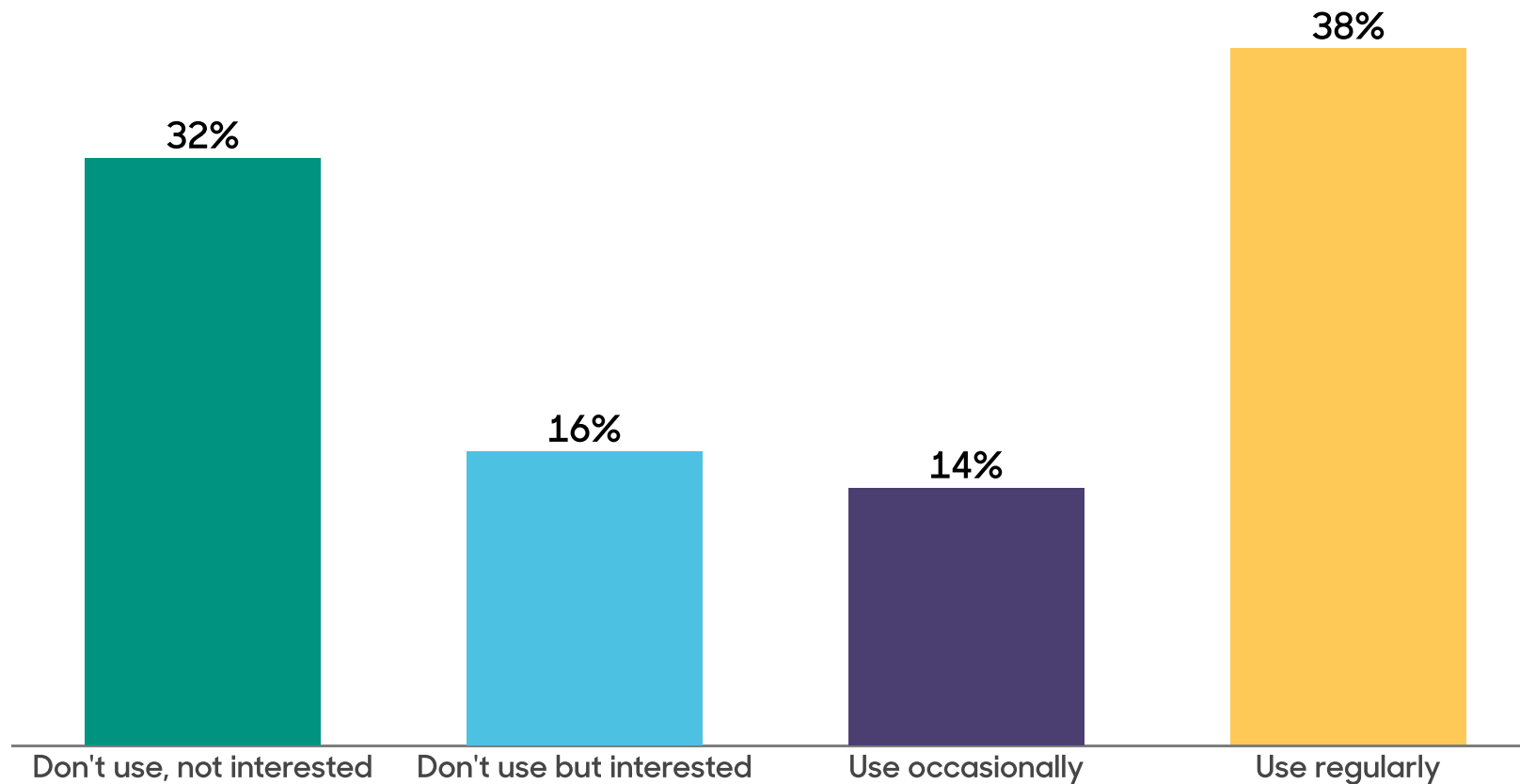
Health solutions consumers turn to first, by generation



Source: *Nutrition Business Journal* surveys targeting average consumers, aged 19-75. Completed February 2025; N=1,010; powered by the Suzy online platform.

Question: "When seeking solutions for your health, which approach do you typically turn to first?"

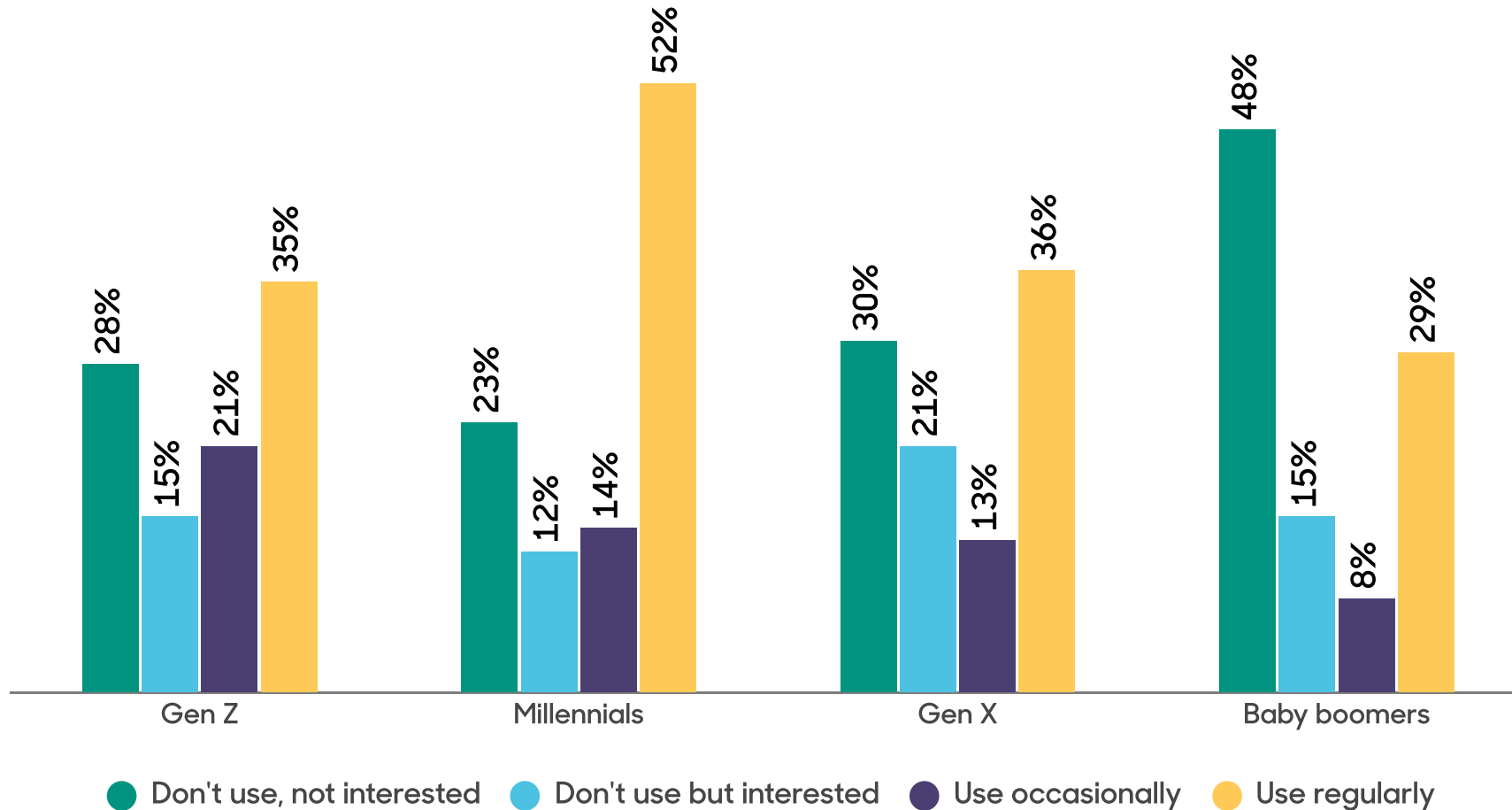
Consumer use of wearables



Source: *Nutrition Business Journal* surveys targeting average consumers, aged 19-75. Completed February 2025; N=1,007; powered by the Suzy online platform.

Question: "Do you currently use a wearable device (e.g., Oura ring, Apple watch, Garmin, Fitbit, etc.) to monitor your fitness or health and wellness goals?"

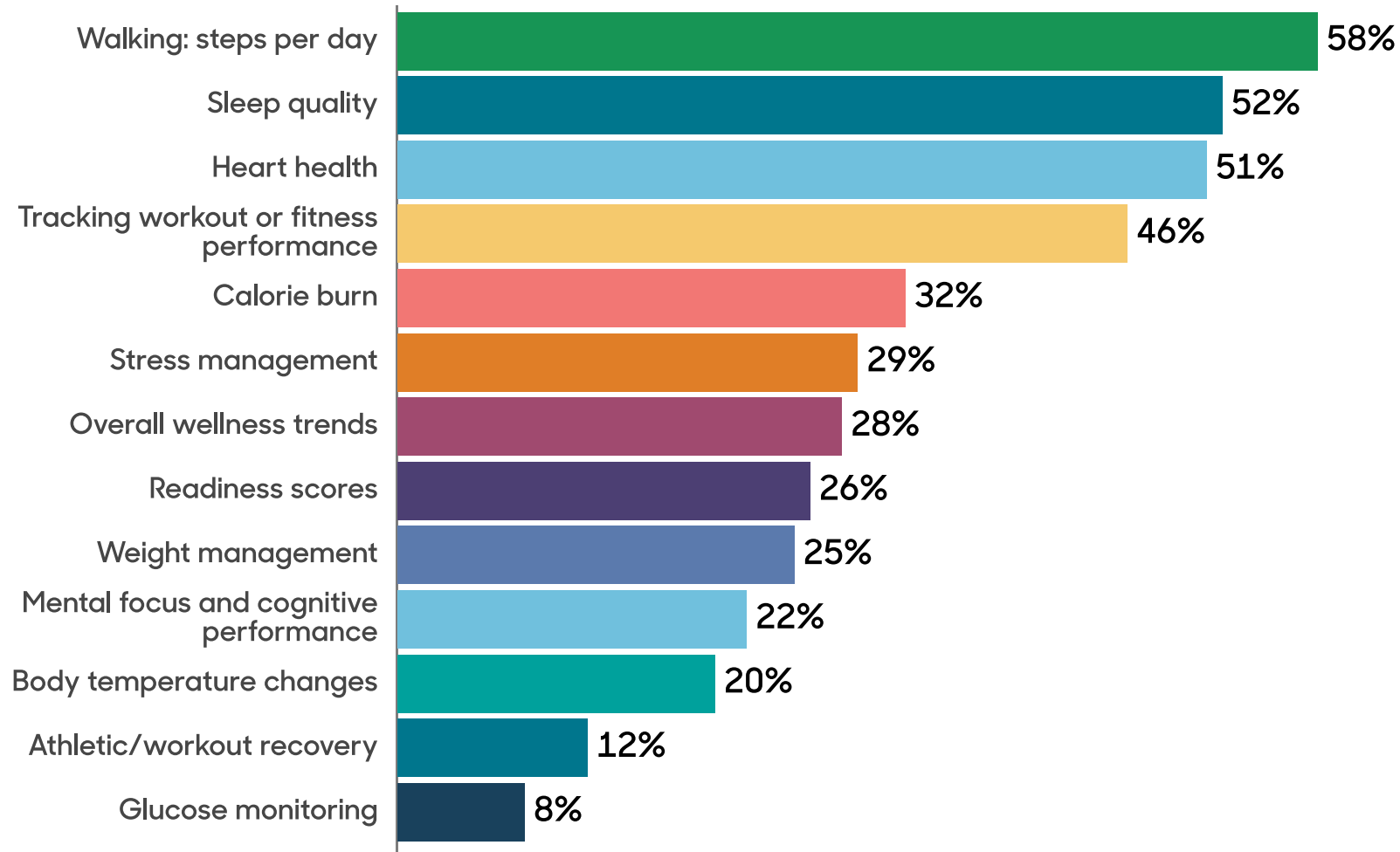
Consumer usage of wearables, by generation



Source: *Nutrition Business Journal* surveys targeting average consumers, aged 19-75. Completed February 2025; N=1,007; powered by the Suzy online platform.

Question: "Do you currently use a wearable device (e.g., Oura ring, Apple watch, Garmin, Fitbit, etc.) to monitor your fitness or health and wellness goals?"

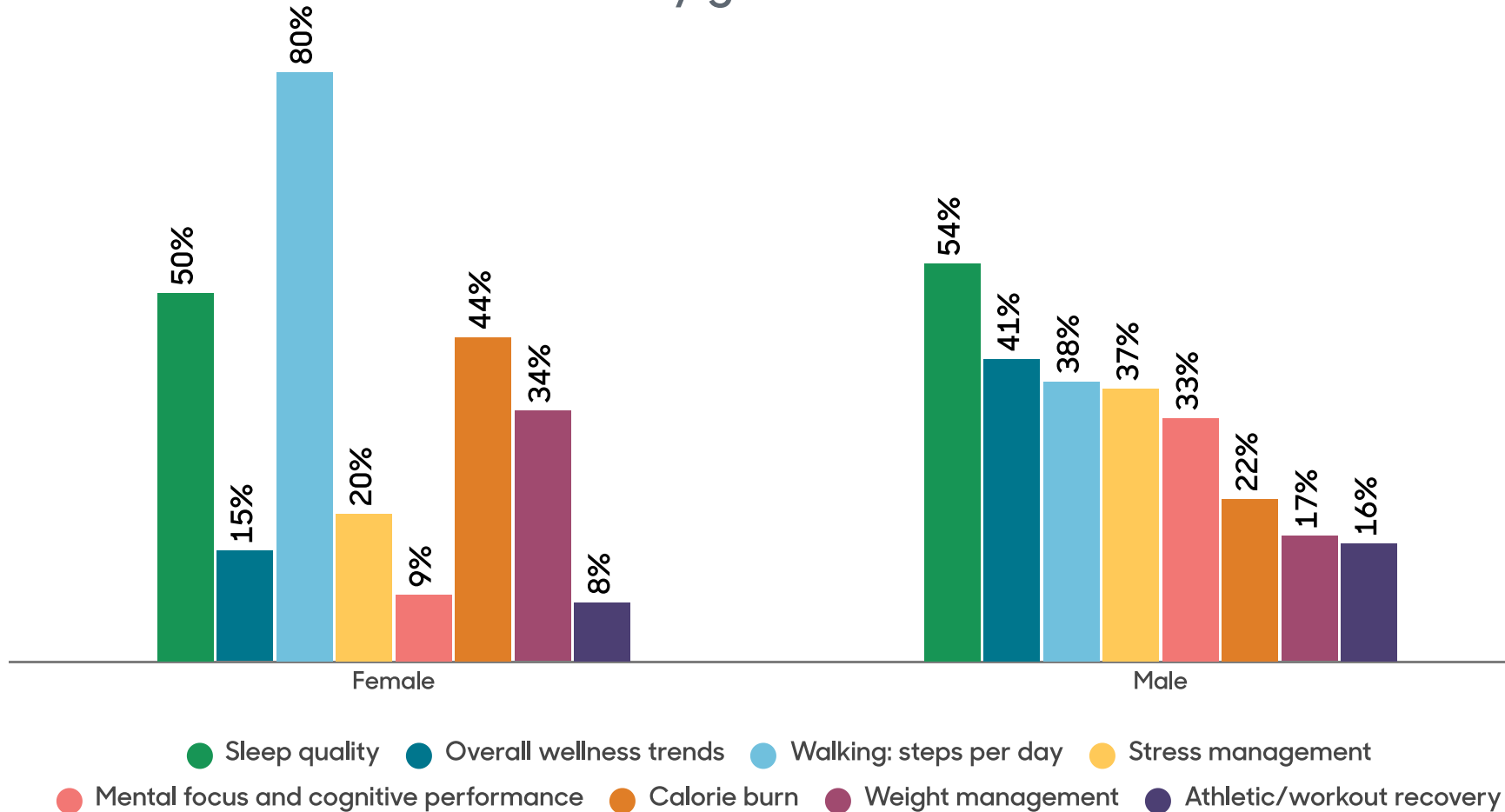
Top health metrics consumers are tracking with wearables



Source: *Nutrition Business Journal* surveys targeting average consumers who use wearables, aged 19–75. Completed February 2025; N=525; powered by the Suzy online platform.

Question: "What health goals or concerns are you primarily tracking with your wearable device? (Select all that apply)."

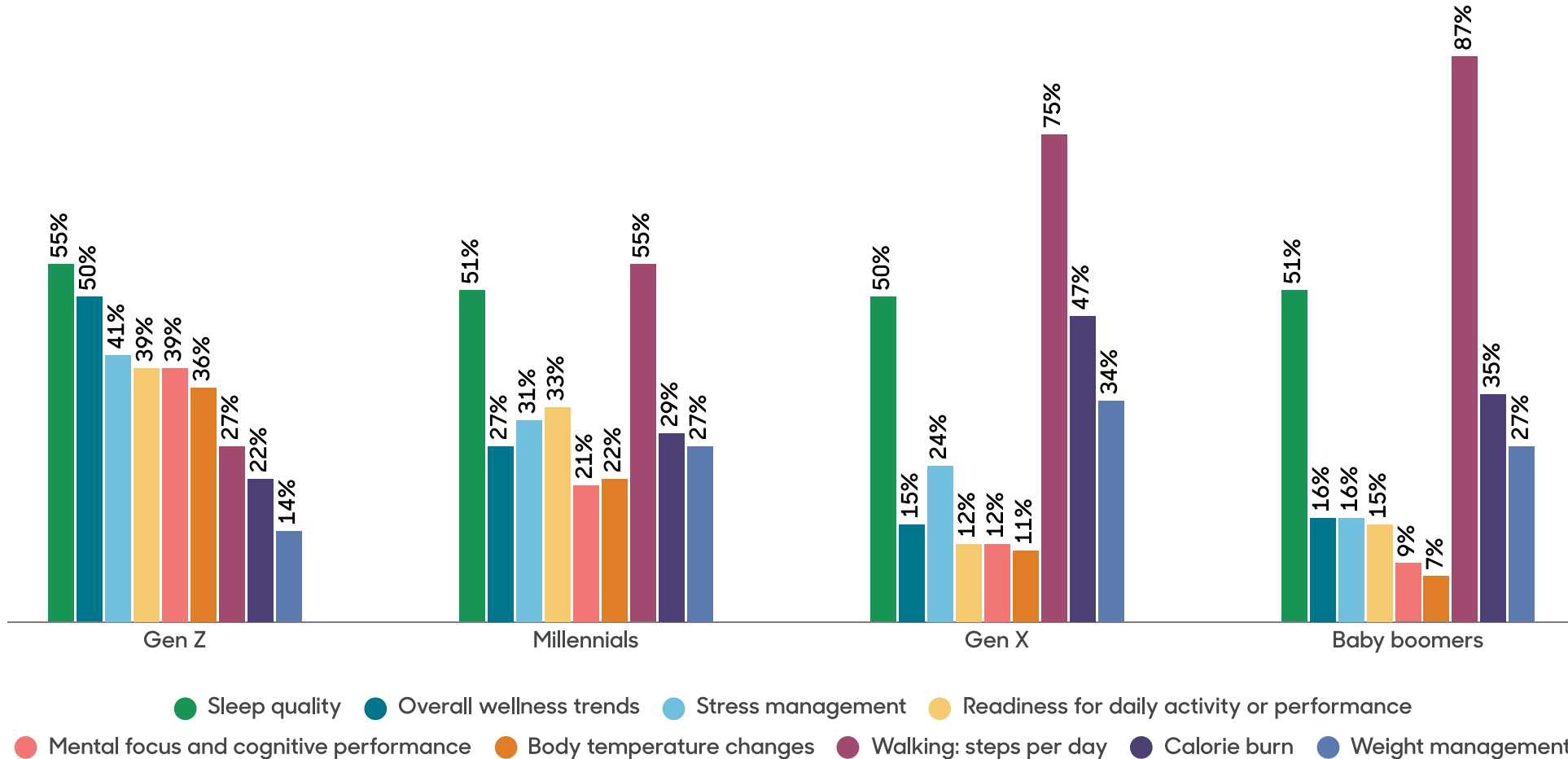
Top health metrics consumers are tracking with wearables, by gender



Source: *Nutrition Business Journal* surveys targeting average consumers who use wearables, aged 19–75. Completed February 2025; N=525; powered by the Suzy online platform.

Question: "What health goals or concerns are you primarily tracking with your wearable device? (Select all that apply)."

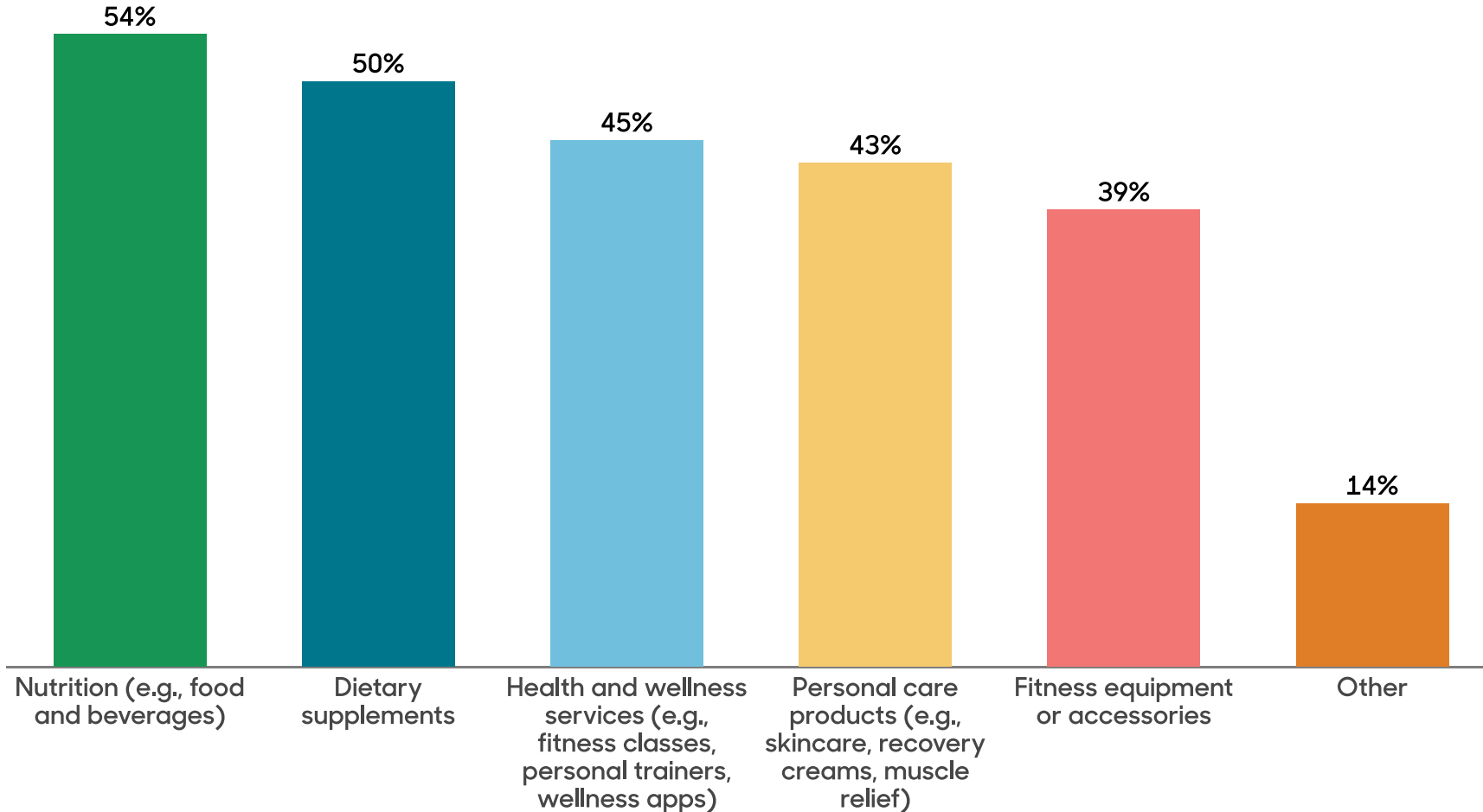
Top health metrics consumers are tracking with wearables, by generation



Source: *Nutrition Business Journal* surveys targeting average consumers who use wearables, aged 19–75. Completed February 2025; N=525; powered by the Suzy online platform.

Question: "What health goals or concerns are you primarily tracking with your wearable device? (Select all that apply)."

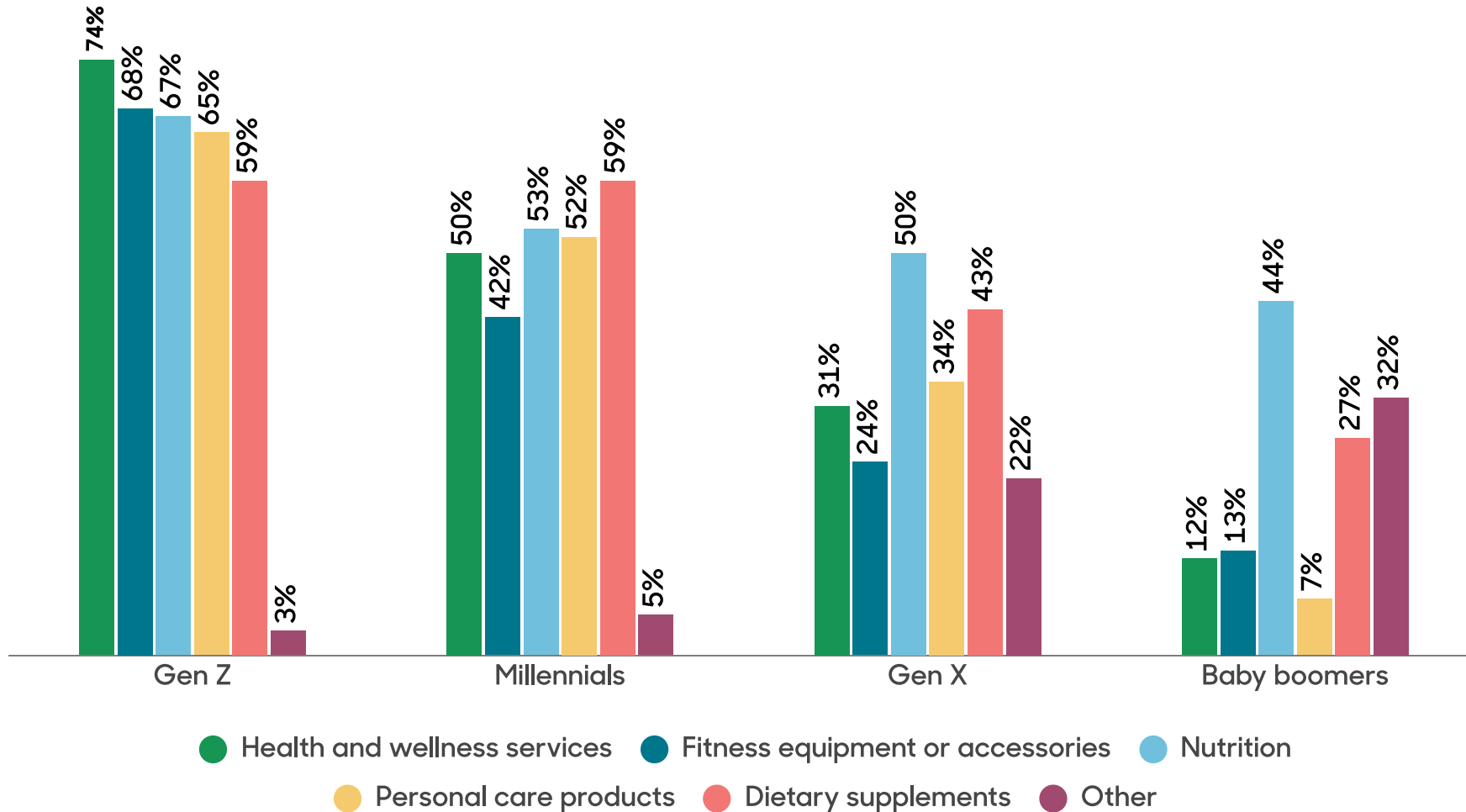
Purchases influenced by wearable data



Source: *Nutrition Business Journal* surveys targeting average consumers who use wearables, aged 19–75. Completed February 2025; N=525; powered by the Suzy online platform.

Question: "Does the data from your fitness tracking wearable influence your purchasing decisions in any of the following categories?"

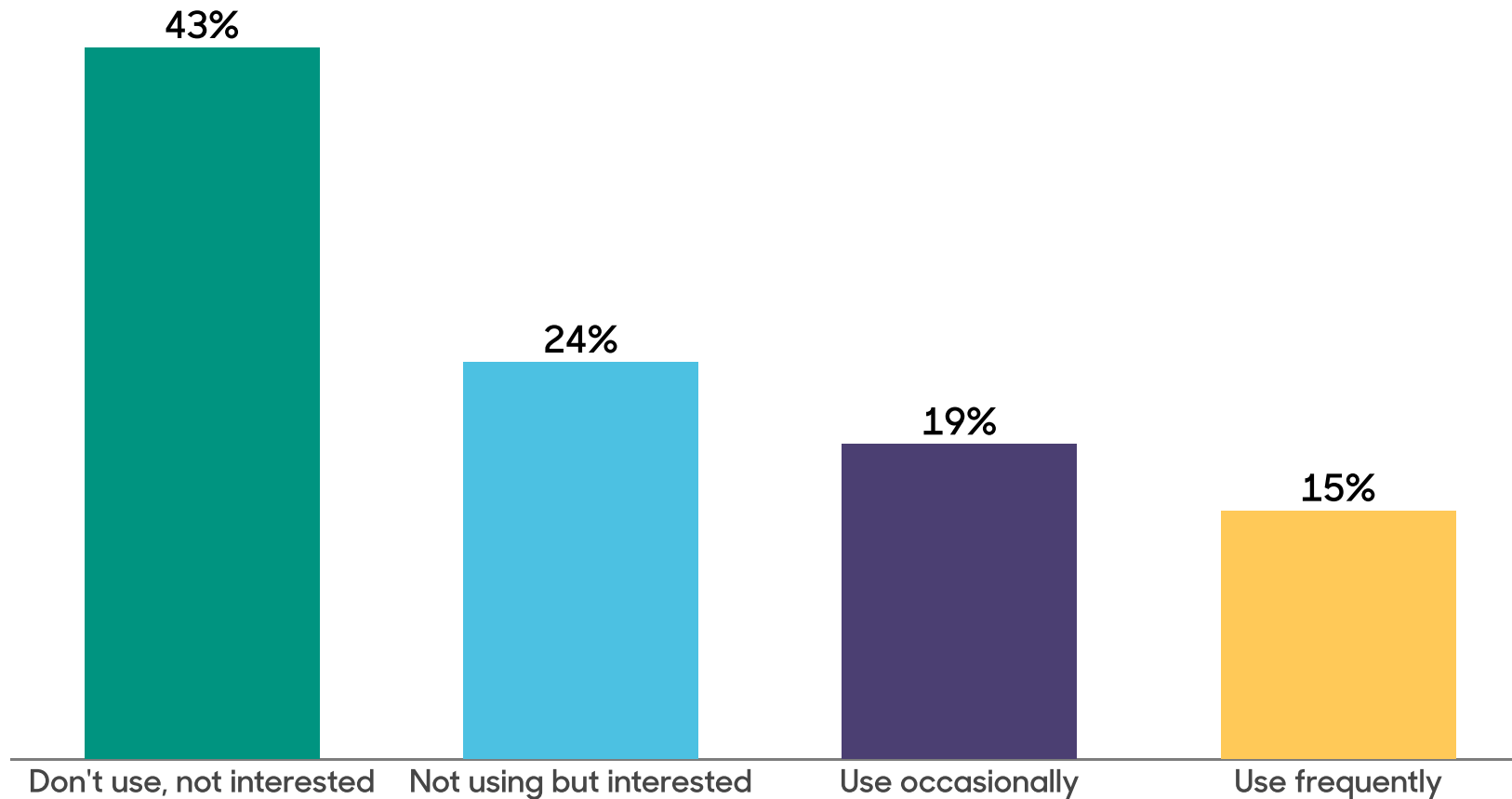
Purchases influenced by wearable data, by generation



Source: *Nutrition Business Journal* surveys targeting average consumers who use wearables, aged 19–75. Completed February 2025; N=525; powered by the Suzy online platform.

Question: "Does the data from your fitness tracking wearable influence your purchasing decisions in any of the following categories?"

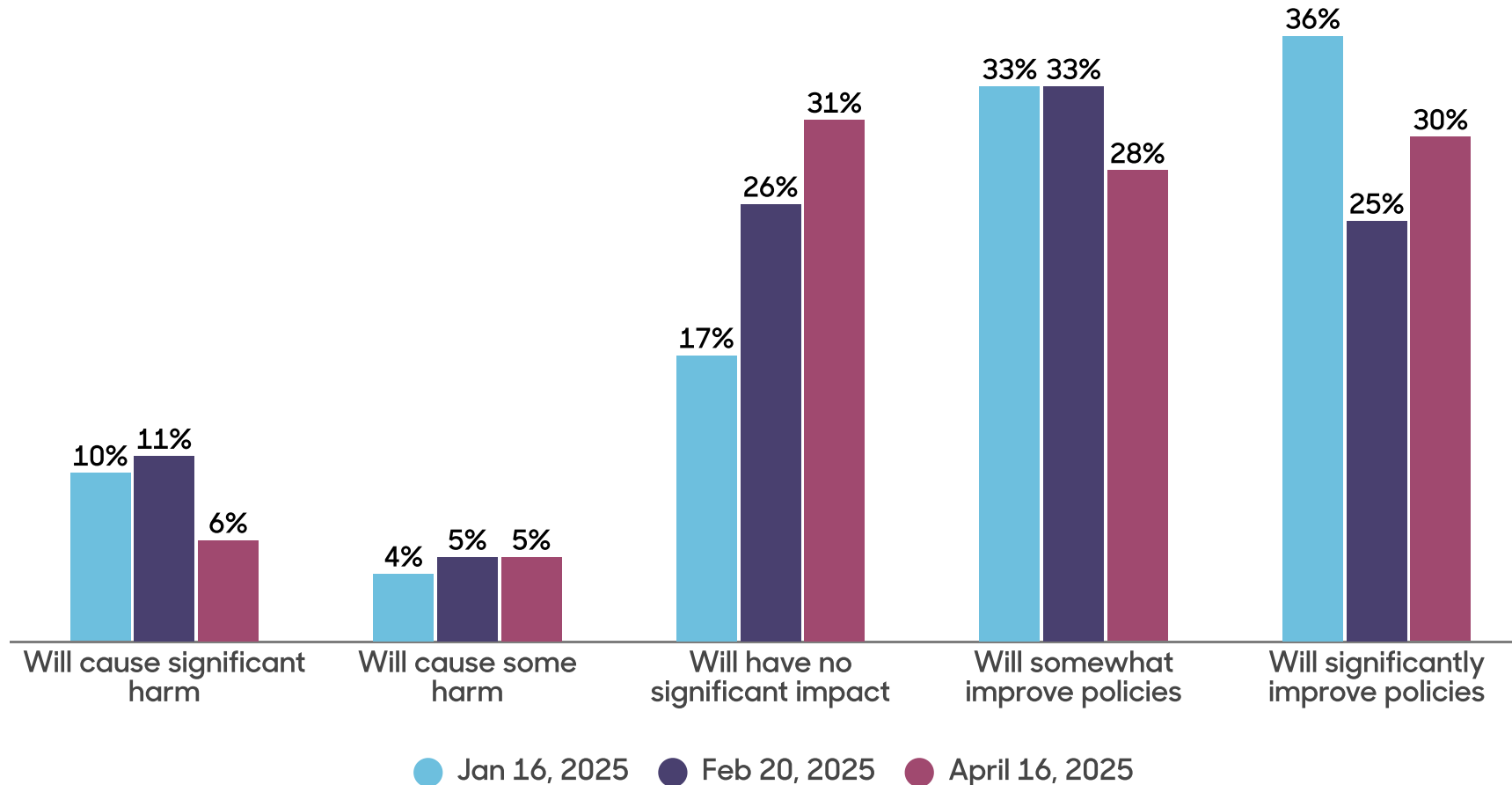
Interest in AI tools for health and wellness advice



Source: *Nutrition Business Journal* surveys targeting average consumers, aged 19-75. Completed February 2025; N=1,006; powered by the Suzy online platform.

Question: "Do you use AI-powered tools for health and wellness (e.g., diets, exercise plans, mindfulness) advice, suggestions or protocols?"

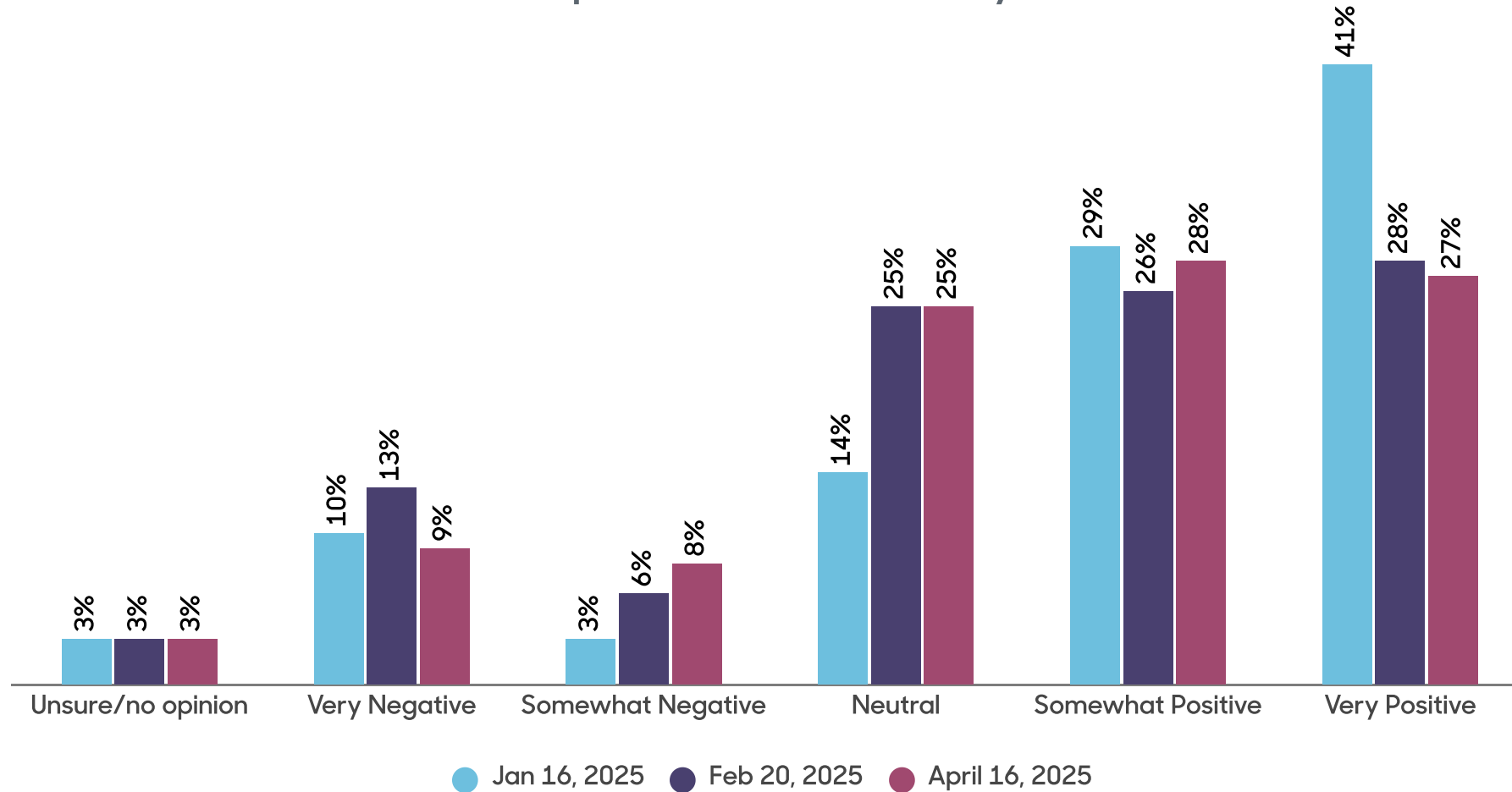
Consumer sentiment about RFK Jr.'s impact on health and wellness policies



Source: *Nutrition Business Journal* survey targeting average consumers; aged 19-75. January 2025, February 2025, and April 2025; N=6,738, N=4,244 and N=1,133; powered by the Suzy online platform.

Question: "How do you feel the confirmation of RFK Jr. as Dept. of Health and Human Services will impact health and wellness policy in the U.S.?"

Consumer sentiment about President Trump's impact on the economy



Source: *Nutrition Business Journal* survey targeting average consumers; aged 19-75. January 2025, February 2025, and April 2025; N=6,469, N=4,545 and N=1,222; powered by the Suzy online platform.

Question: "What impact do you believe the Trump administration's priorities will have on the U.S. economy?"

Inflation-resistant nutrition

While inflation concerns persist, affecting 67% of natural and organic food and beverage consumers' purchasing to some degree, consumers' increasing interest in nutrient density and functional ingredients like protein, fiber and probiotics is contributing to steady growth within Food and Beverage. The category had \$138 billion in sales in 2024; when functional foods and beverages are included, that grows to \$235 billion. After a couple years of robust growth, plant-based protein products are stabilizing and shifting toward less-processed, cleaner-label alternatives.

>> PROTEIN PUSH

Animal proteins are driving significant momentum in Food and Beverage. Meat/fish/poultry saw exceptional growth of 13.2%, followed by dairy at 9.8%, while items containing more than 15 grams of protein are seeing dramatic sales increases across multiple categories, according to SPINS. More than 40% of organic food and beverage consumers told *NBJ* high protein is the most important aspect in their purchasing decisions—a full 20 percentage points higher than the next answer, low and no added sugar.

>> ORGANIC GROWTH

Organic products are outperforming non-organic in both dollar and unit growth, according to SPINS. Among the fastest-growing organic categories are soda, snack bites and energy gels, and refrigerated meat, poultry and seafood.

>> MASS APPEAL

More than 60% of organic food and beverage sales are made in Mass Market—over twice the amount sold in Natural and Specialty. *NBJ* consumer research found that natural and organic food and beverage consumers primarily shop at mass market retailers (both in-store and online), warehouse stores and on Amazon. Only about a quarter of these consumers shop at natural food chains, and a mere 7% pick up their organic groceries at local natural food stores.

>> CASH COW

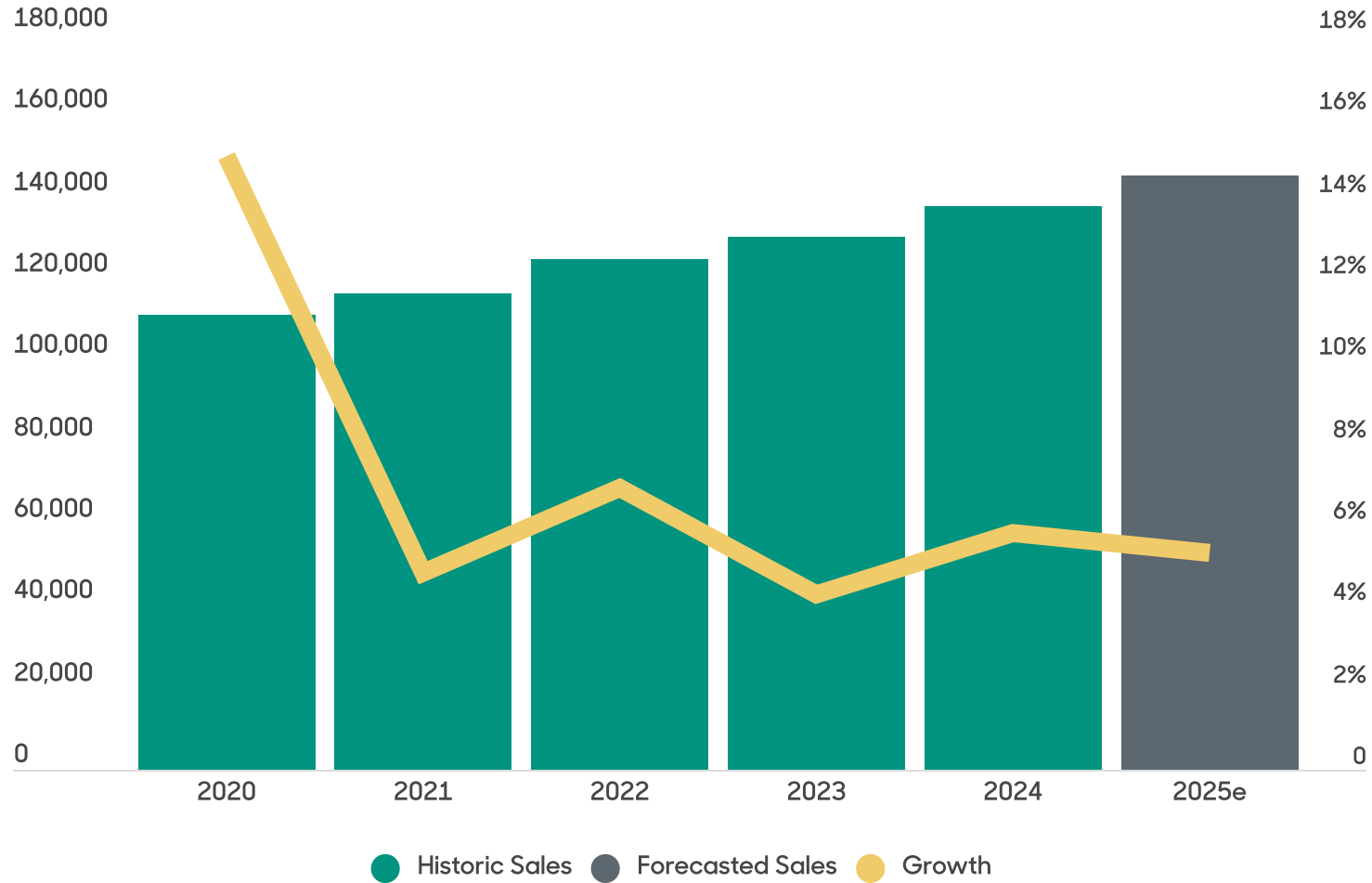
With nearly 10% growth and \$20.5 billion in sales in 2024, dairy is the surprise success story of 2024, ranking third in sales after fruit and vegetables and beverages and accounting for about 15% of the Food and Beverage market.



TRENDING: Elevated elixirs

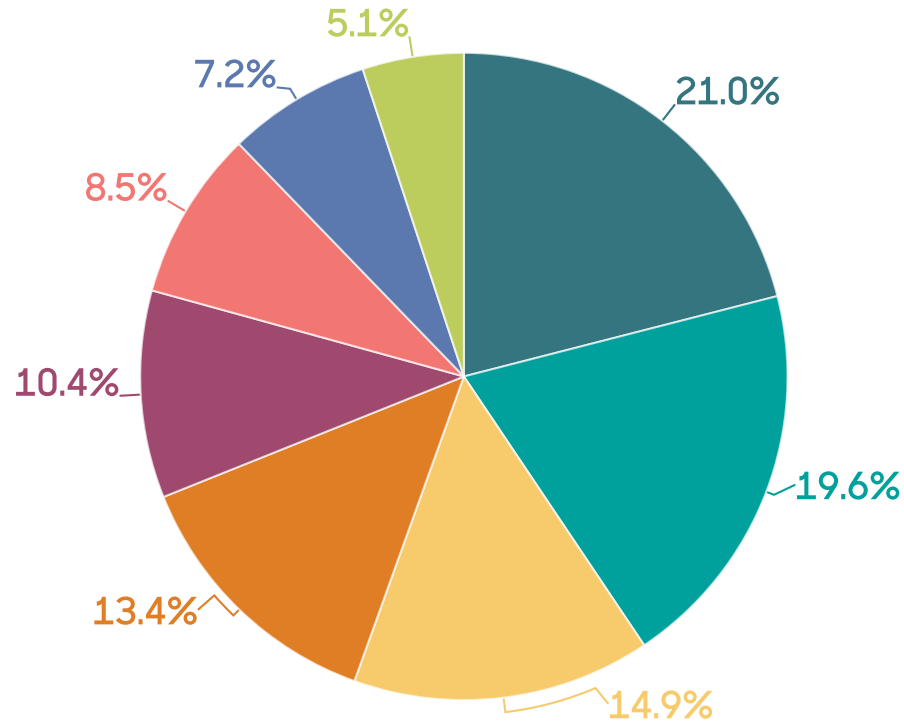
The alcohol-free revolution is booming—and the market is maturing to meet the demands of increasingly sophisticated non-imbibers. Nearly a quarter of consumers have cut back on drinking compared to last year, and an impressive 21% no longer drink alcohol at all. But the NA market isn't just about replacing people's cocktails—it's evolving into something far more exciting. Today's NA beverages are designed with purpose, supporting everything from hydration and cognitive function to gut health and longevity. The numbers don't lie: gut-health sodas are skyrocketing with more than 125% growth, according to SPINS, while the market is being flooded with mood-enhancing euphoric drinks infused with ingredients like ashwagandha, reishi and L-theanine—all targeting proactive, health-conscious consumers seeking benefits beyond just avoiding alcohol.

Natural and organic food and beverage sales and growth, 2020-2025e



Source: Nutrition Business Journal (\$mil, consumer sales)

Natural and organic food and beverage sales by category, 2024



- Fruit and vegetables
- Beverages
- Dairy
- Packaged/prepared foods
- Breads and grains
- Snack foods
- Meat, fish, poultry
- Condiments

Source: Nutrition Business Journal

Natural and organic food and beverage sales by category, 2020–2025e

	2020	2021	2022	2023	2024	2025e
Dairy	15,970	16,194	17,688	18,681	20,505	21,767
Fruit and vegetables	24,542	25,715	26,821	27,595	28,907	30,190
Breads and grains	11,990	12,153	12,953	13,607	14,251	14,874
Meat, fish, poultry	7,459	7,696	8,253	8,730	9,875	10,685
Beverages	20,409	23,150	24,961	25,915	26,962	28,496
Snack foods	8,654	9,531	10,447	11,061	11,671	12,362
Packaged/prepared foods	16,000	16,178	17,269	17,840	18,496	19,229
Condiments	6,188	5,974	6,256	6,599	6,962	7,346
Total	111,214	116,591	124,648	130,028	137,630	144,949

Natural and organic food and beverage growth by category, 2020–2025e

	2020	2021	2022	2023	2024	2025e
Dairy	16.4%	1.4%	9.2%	5.6%	9.8%	6.2%
Fruit and vegetables	12.4%	4.8%	4.3%	2.9%	4.8%	4.4%
Breads and grains	15.4%	1.4%	6.6%	5.0%	4.7%	4.4%
Meat, fish, poultry	20.5%	3.2%	7.2%	5.8%	13.1%	8.2%
Beverages	16.5%	13.4%	7.8%	3.8%	4.0%	5.7%
Snack foods	4.5%	10.1%	9.6%	5.9%	5.5%	5.9%
Packaged/prepared foods	15.7%	1.1%	6.7%	3.3%	3.7%	4.0%
Condiments	25.5%	-3.5%	4.7%	5.5%	5.5%	5.5%
Total	15.0%	4.8%	6.9%	4.3%	5.8%	5.3%

Source: Nutrition Business Journal (\$mil, consumer sales)

Natural and organic food and beverage market share by category, 2020-2025e

	2020	2021	2022	2023	2024	2025e
Dairy	14.4%	13.9%	14.2%	14.4%	14.9%	15.0%
Fruit and vegetables	22.1%	22.1%	21.5%	21.2%	21.0%	20.8%
Breads and grains	10.8%	10.4%	10.4%	10.5%	10.4%	10.3%
Meat, fish, poultry	6.7%	6.6%	6.6%	6.7%	7.2%	7.4%
Beverages	18.4%	19.9%	20.0%	19.9%	19.6%	19.7%
Snack foods	7.8%	8.2%	8.4%	8.5%	8.5%	8.5%
Packaged/prepared foods	14.4%	13.9%	13.9%	13.7%	13.4%	13.3%
Condiments	5.6%	5.1%	5.0%	5.1%	5.1%	5.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Natural and organic food and beverage sales by channel, 2020-2025e

	2020	2021	2022	2023	2024	2025e
Natural and Specialty	32,405	32,875	34,258	35,852	38,667	40,829
Mass Market	69,165	73,578	79,913	83,220	87,474	91,982
Mail, DRTV and Radio	2,461	2,569	2,637	2,779	2,911	3,060
MLM/Network Marketing	1,463	1,518	1,557	1,563	1,607	1,655
Practitioner	380	394	405	419	434	454
E-commerce	5,340	5,657	5,877	6,194	6,548	6,980
Total	111,214	116,591	124,648	130,028	137,641	144,960

Source: Nutrition Business Journal (\$mil, consumer sales)

Natural and organic food and beverage growth by channel, 2020-2025e

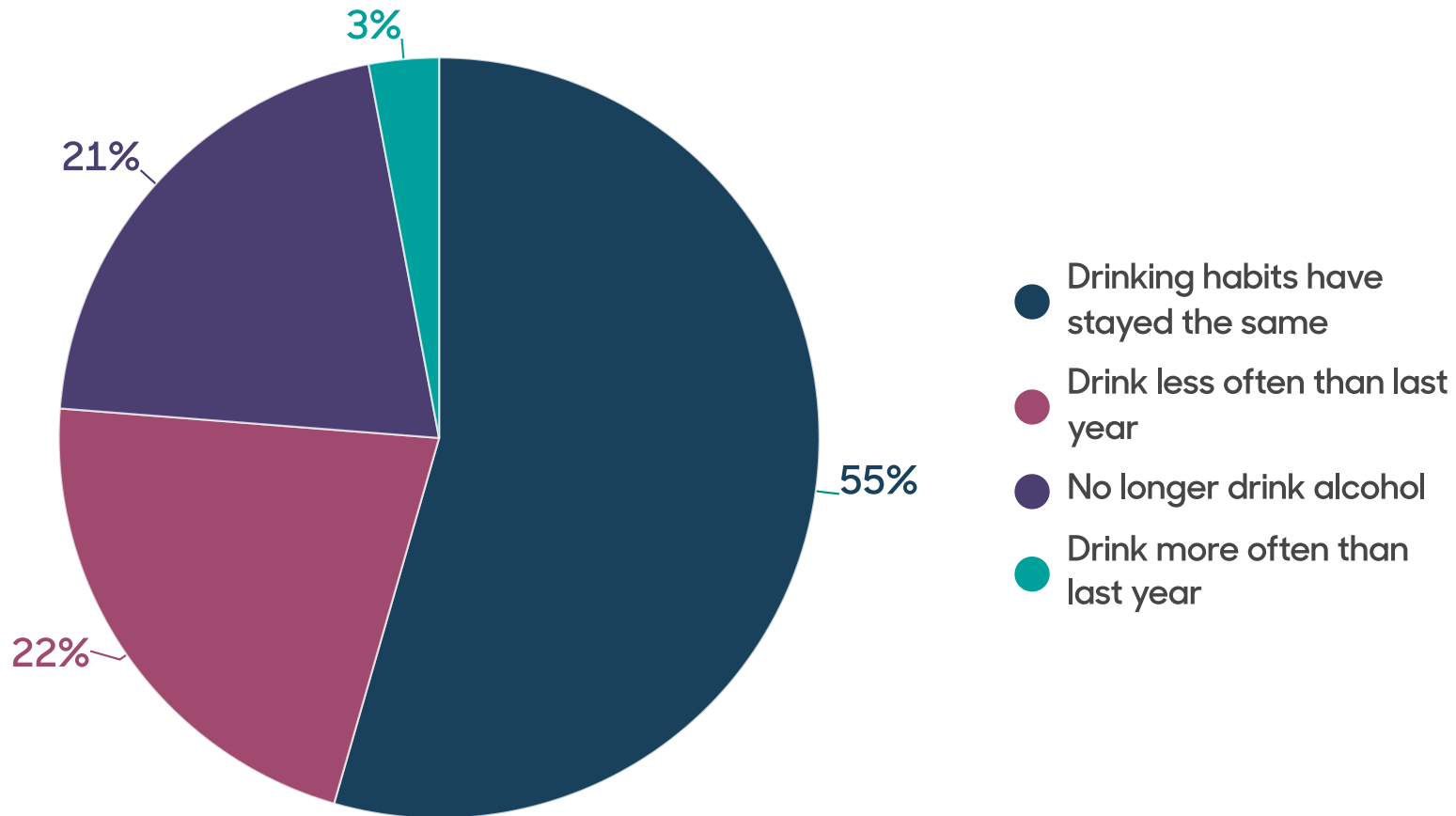
	2020	2021	2022	2023	2024	2025e
Natural and Specialty	7.0%	1.5%	4.2%	4.7%	7.9%	5.6%
Mass Market	17.2%	6.4%	8.6%	4.1%	5.1%	5.2%
Mail, DRTV and Radio	17.6%	4.4%	2.7%	5.4%	4.8%	5.1%
MLM/Network Marketing	4.5%	3.8%	2.6%	0.4%	2.8%	3.0%
Practitioner	3.3%	3.6%	2.9%	3.5%	3.5%	4.5%
E-commerce	50.9%	5.9%	3.9%	5.4%	5.7%	6.6%
Total	15.0%	4.8%	6.9%	4.3%	5.9%	5.3%

Natural and organic food and beverage market share by channel, 2020-2025e

	2020	2021	2022	2023	2024	2025e
Natural and Specialty	29.1%	28.2%	27.5%	27.6%	28.1%	28.2%
Mass Market	62.2%	63.1%	64.1%	64.0%	63.6%	63.5%
Mail, DRTV and Radio	2.2%	2.2%	2.1%	2.1%	2.1%	2.1%
MLM/Network Marketing	1.3%	1.3%	1.2%	1.2%	1.2%	1.1%
Practitioner	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%
E-commerce	4.8%	4.9%	4.7%	4.8%	4.8%	4.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Nutrition Business Journal

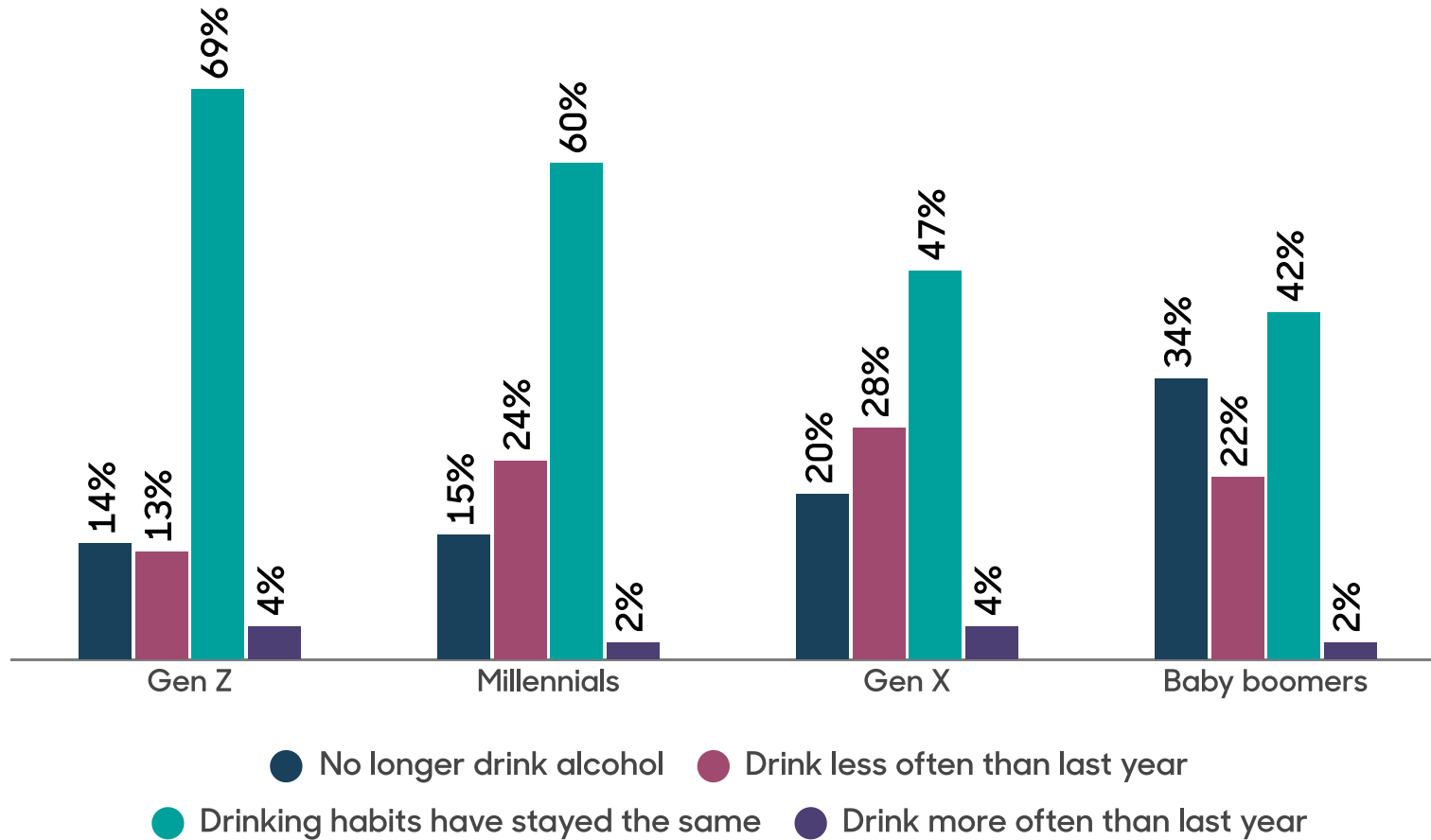
How alcohol consumption has changed compared to last year



Source: *Nutrition Business Journal* surveys targeting average consumers, aged 19-75. Completed February 2025; N=1,006; powered by the Suzy online platform.

Question: "In the past year, how has your alcohol consumption changed?"

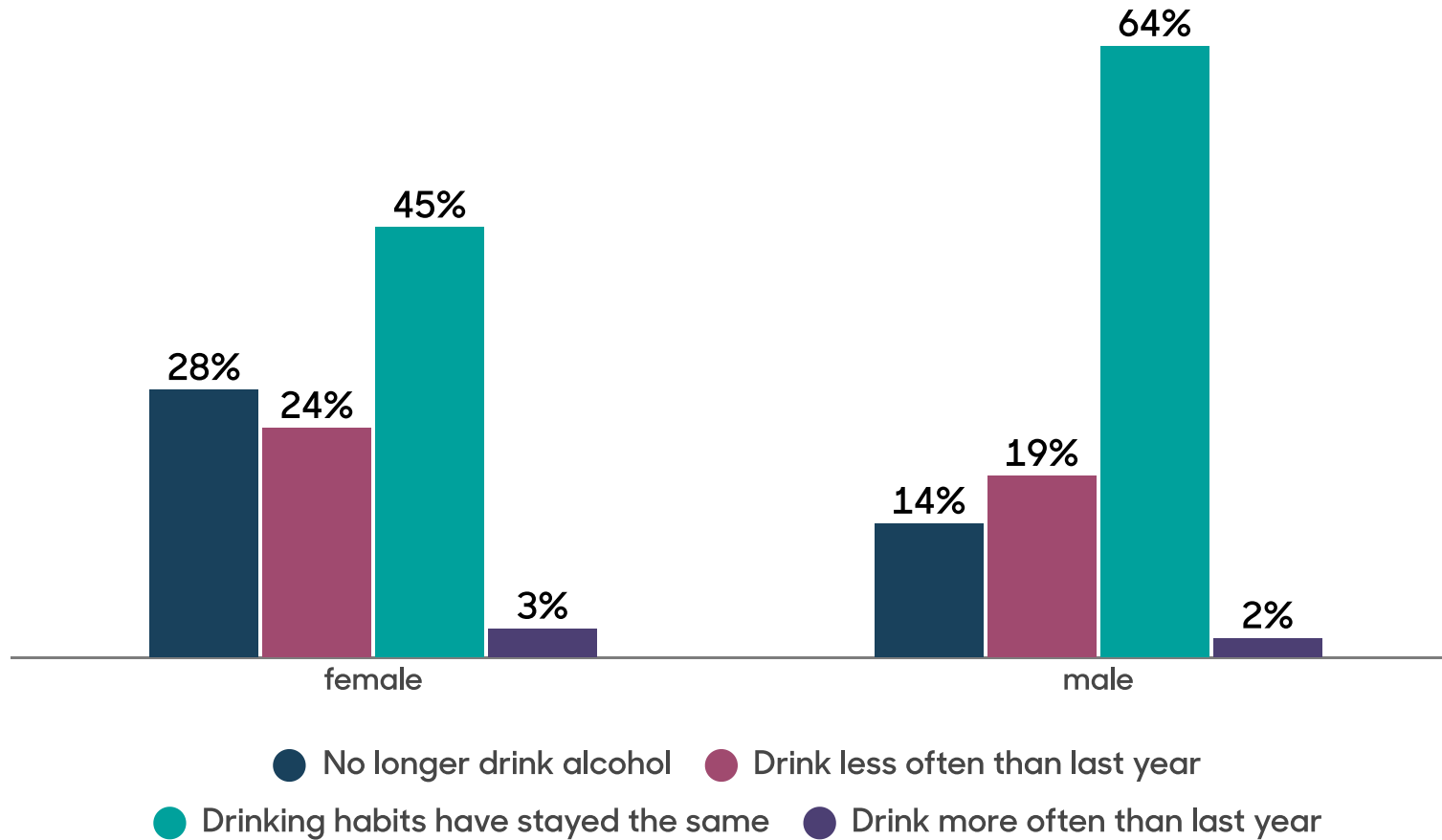
How alcohol consumption has changed compared to last year, by generation



Source: *Nutrition Business Journal* surveys targeting average consumers, aged 19-75. Completed February 2025; N=1,006; powered by the Suzy online platform.

Question: "In the past year, how has your alcohol consumption changed?"

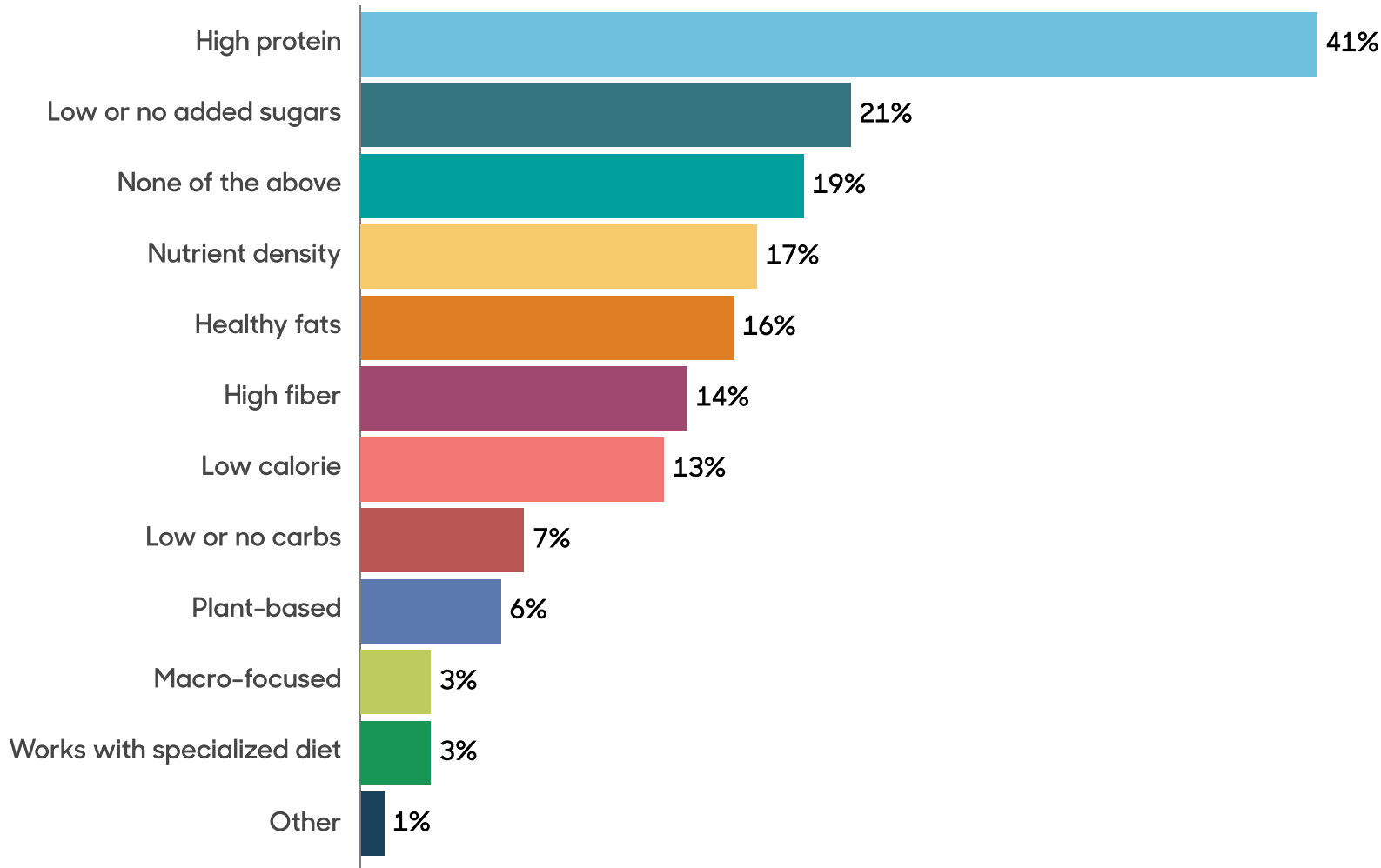
How alcohol consumption has changed compared to last year, by gender



Source: *Nutrition Business Journal* surveys targeting average consumers, aged 19-75. Completed February 2025; N=1,006; powered by the Suzy online platform.

Question: "In the past year, how has your alcohol consumption changed?"

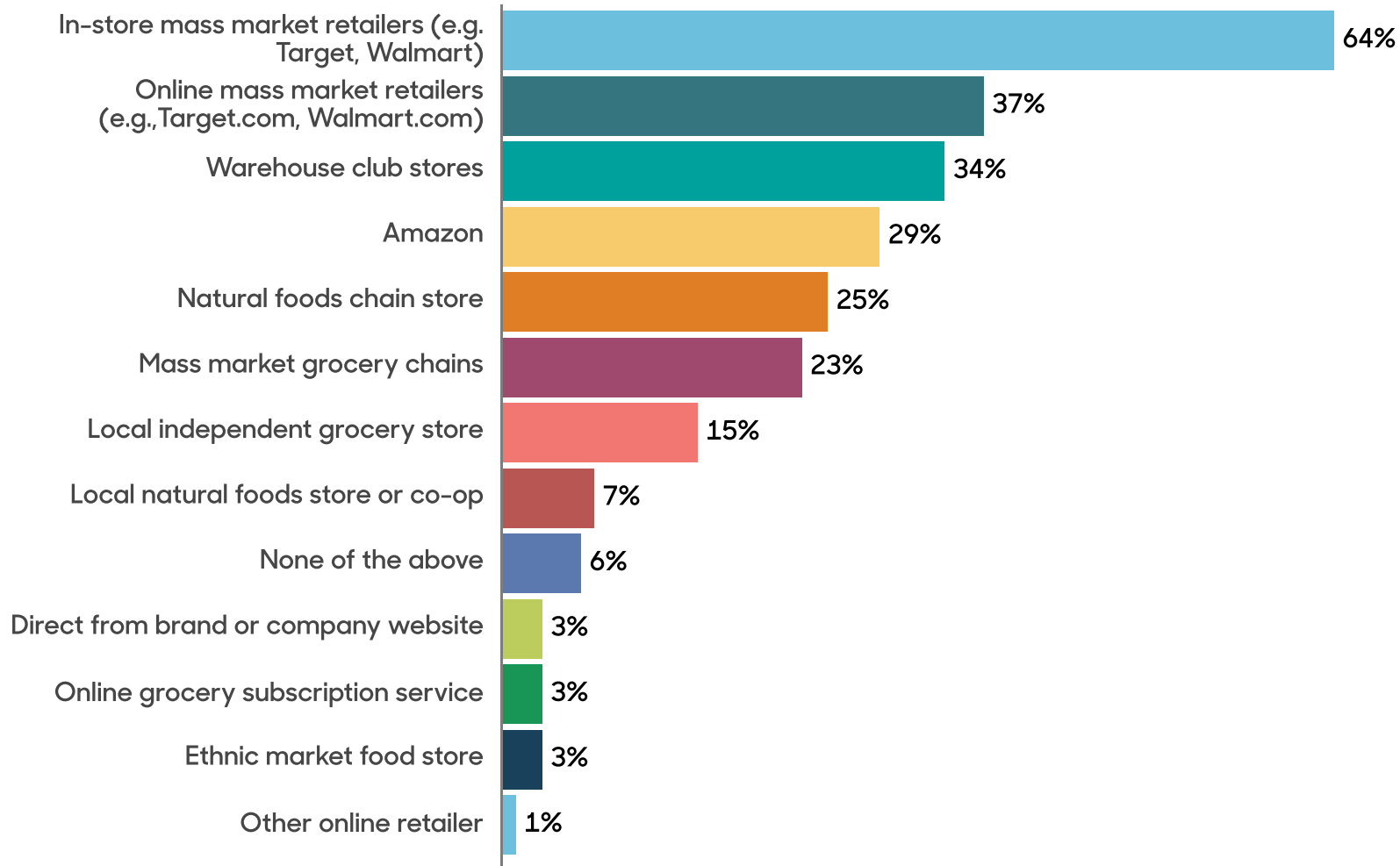
Nutritional aspects important to consumers



Source: *Nutrition Business Journal* surveys targeting consumers that purchase natural or organic food or beverage products, aged 19-75. Completed February 2025; N=1,026; powered by the Suzy online platform.

Question: "What nutritional aspects are important to you when purchasing natural or organic food and beverage products? Please rank your top two options."

Top channels for natural and organic food and beverage purchases



Source: *Nutrition Business Journal* surveys targeting consumers that purchase natural or organic food or beverage products, aged 19-75. Completed February 2025; N=1,012; powered by the Suzy online platform.

Question: "Where do you primarily purchase natural or organic food and beverage products? Please select your top two options."

Wellness boom

Supplements continue to show solid growth, with sales increasing from \$69.3 billion in 2024 to a projected \$73.2 billion in 2025, with sports nutrition and specialty ingredients leading the way. According to SPINS, hormone-related health products present a significant opportunity for supplement brands, with reproductive health products growing by 20%, menopause solutions by 14% and pre- and postnatal supplements by 4%.

➤➤ **BOOMING BOTANICALS**
Driven by star ingredients like turmeric, functional mushrooms and ashwagandha, Herbs and Botanicals is growing faster than the overall supplement industry and is projected to maintain a roughly 19% share of the overall supplements market, growing from \$13.2 billion in 2024 to \$14 billion in 2025.

➤➤ **WANING VITALITY**
While Vitamins and Minerals maintain the largest market share at 32.5% and continue to lead in sales with nearly \$24 billion projected for 2025, the category's growth has slowed considerably to around 3% annually.

➤➤ **POWER DRIVE**
With around 7% annual growth—the highest in the industry—Sports Nutrition and Meal Replacement continues to drive supplement sales. The category hit \$17.7 billion in 2024 and is projected to reach \$19 billion in 2025.

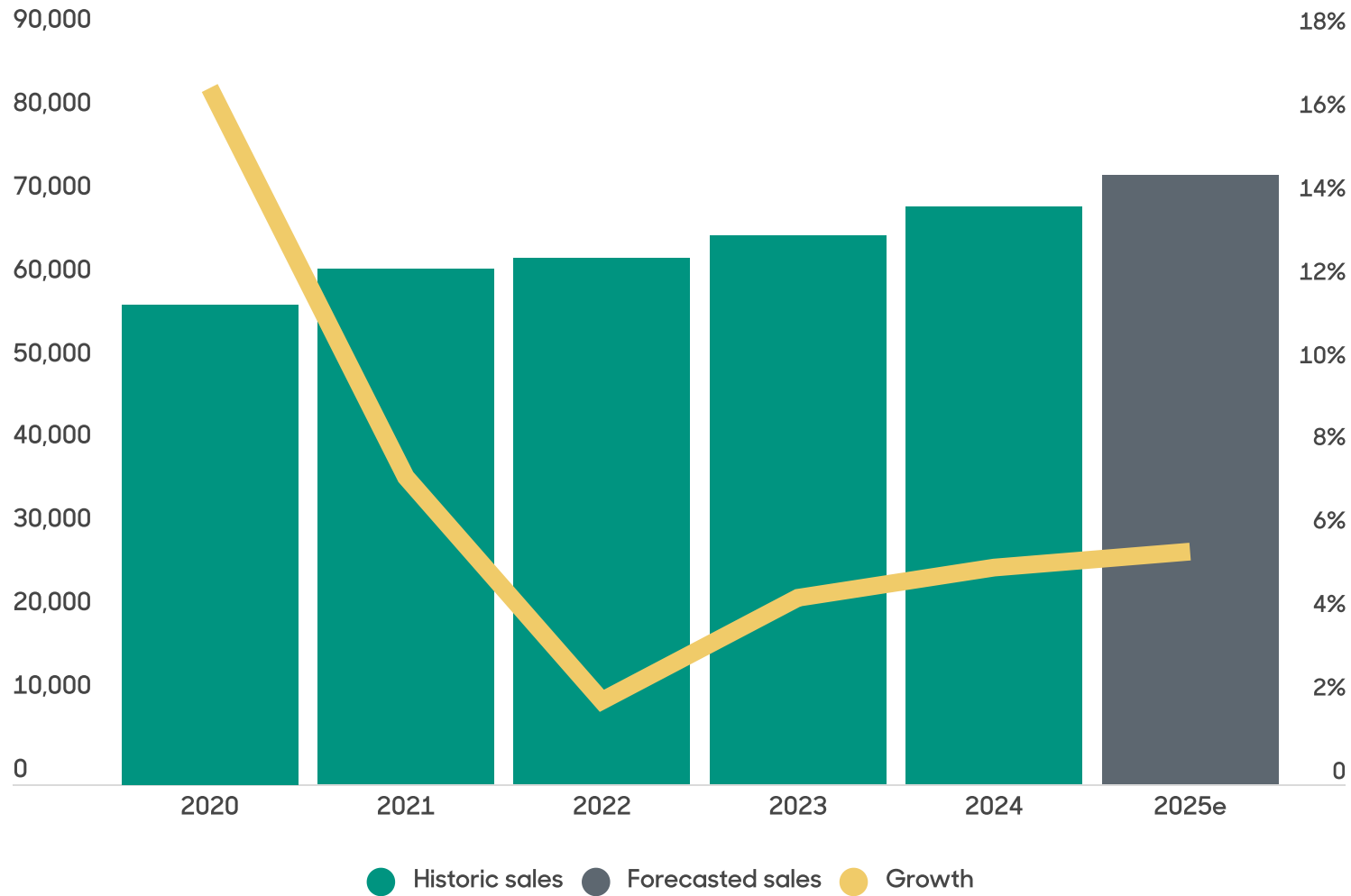
➤➤ **DIGITAL DISRUPTION**
With Natural and Specialty, Mass Market and E-commerce each accounting for roughly a quarter of supplement sales, omnichannel distribution is the name of the game for supplement brands. E-commerce is growing twice as fast as Mass Market and more than four times as fast as Natural and Specialty, a dramatic shift toward an increasingly digital future.



TRENDING: The Ozempic effect

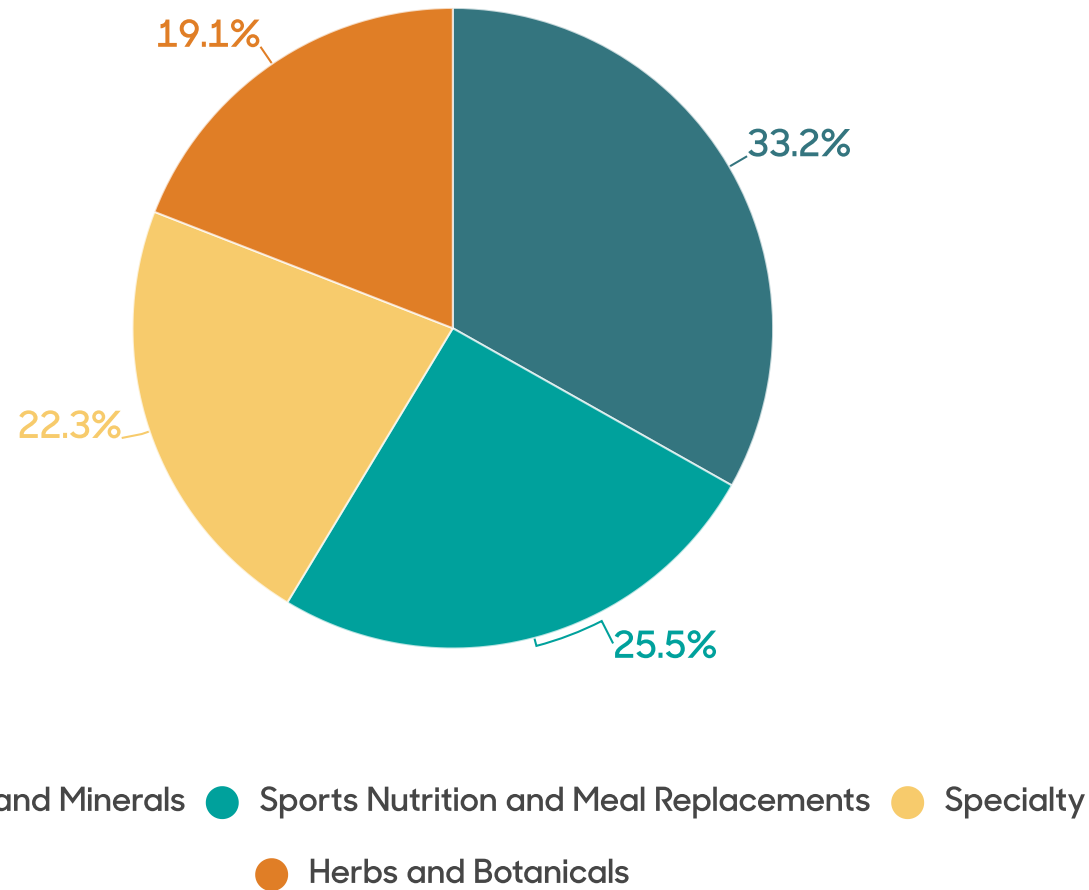
It's impossible to underestimate the seismic impact GLP-1 drugs continue to have on the supplement industry. As these medications mainstream, supplement brands are developing natural alternatives that can stimulate GLP-1 and complementary products that support patients throughout their GLP-1 journey. The most successful brands are creating targeted solutions addressing specific needs: optimization formulas that counter potential deficiencies, muscle preservation complexes, gut health support for managing digestive side effects and evidence-based natural GLP-1 potentiators that can enhance results or maintain progress post-medication. Supplement brands are also positioning themselves as part of the integrated healthcare solution by developing products that can serve as “step-down” options when patients discontinue prescription GLP-1s. This strategic pivot acknowledges the reality that consumers increasingly view supplements and pharmaceuticals not as competing alternatives but as complementary tools in their personalized health strategies.

Supplement industry sales and growth, 2020-2025e



Source: Nutrition Business Journal (\$mil, consumer sales)

Supplement industry sales by category, 2024



Source: Nutrition Business Journal

Supplement industry sales by category, 2020-2025e

	2020	2021	2022	2023	2024	2025e
Herbs and Botanicals	11,168	12,241	12,018	12,551	13,231	14,034
Sports Nutrition and Meal Replacements	13,396	14,340	15,358	16,456	17,643	18,895
Vitamins and Minerals	21,192	22,388	22,026	22,351	22,984	23,744
Specialty	11,763	12,829	13,633	14,512	15,423	16,455
Total	57,519	61,798	63,035	65,869	69,281	73,128

Supplement industry growth by category, 2020-2025e

	2020	2021	2022	2023	2024	2025e
Herbs and Botanicals	17.2%	9.6%	-1.8%	4.4%	5.4%	6.1%
Sports Nutrition and Meal Replacements	6.1%	7.0%	7.1%	7.1%	7.2%	7.1%
Vitamins and Minerals	20.4%	5.6%	-1.6%	1.5%	2.8%	3.3%
Specialty	23.4%	9.1%	6.3%	6.4%	6.3%	6.7%
Total	16.7%	7.4%	2.0%	4.5%	5.2%	5.6%

Source: Nutrition Business Journal (\$mil, consumer sales)



Supplement industry market share by category, 2020-2025e

	2020	2021	2022	2023	2024	2025
Herbs and Botanicals	19.4%	19.8%	19.1%	19.1%	19.1%	19.2%
Sports Nutrition and Meal Replacements	23.3%	23.2%	24.4%	25.0%	25.5%	25.8%
Vitamins and Minerals	36.8%	36.2%	34.9%	33.9%	33.2%	32.5%
Specialty	20.4%	20.8%	21.6%	22.0%	22.3%	22.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Supplement industry sales by channel, 2020-2025e

	2020	2021	2022	2023	2024	2025e
E-Commerce	9,804	12,647	13,360	14,602	16,079	17,751
Mail Order, DRTV and Radio	2,198	2,121	1,953	1,888	1,844	1,805
Mass Market Retail	15,327	15,926	16,827	17,738	18,723	19,828
MLM-Network Marketing	8,228	8,654	8,180	8,242	8,308	8,361
Natural and Specialty Retail	17,169	17,348	17,246	17,512	17,983	18,553
Practitioner	4,793	5,102	5,468	5,888	6,345	6,830
Total	57,519	61,798	63,035	65,869	69,281	73,128

Source: Nutrition Business Journal (\$mil, consumer sales)

Supplement industry growth by channel, 2020-2025e

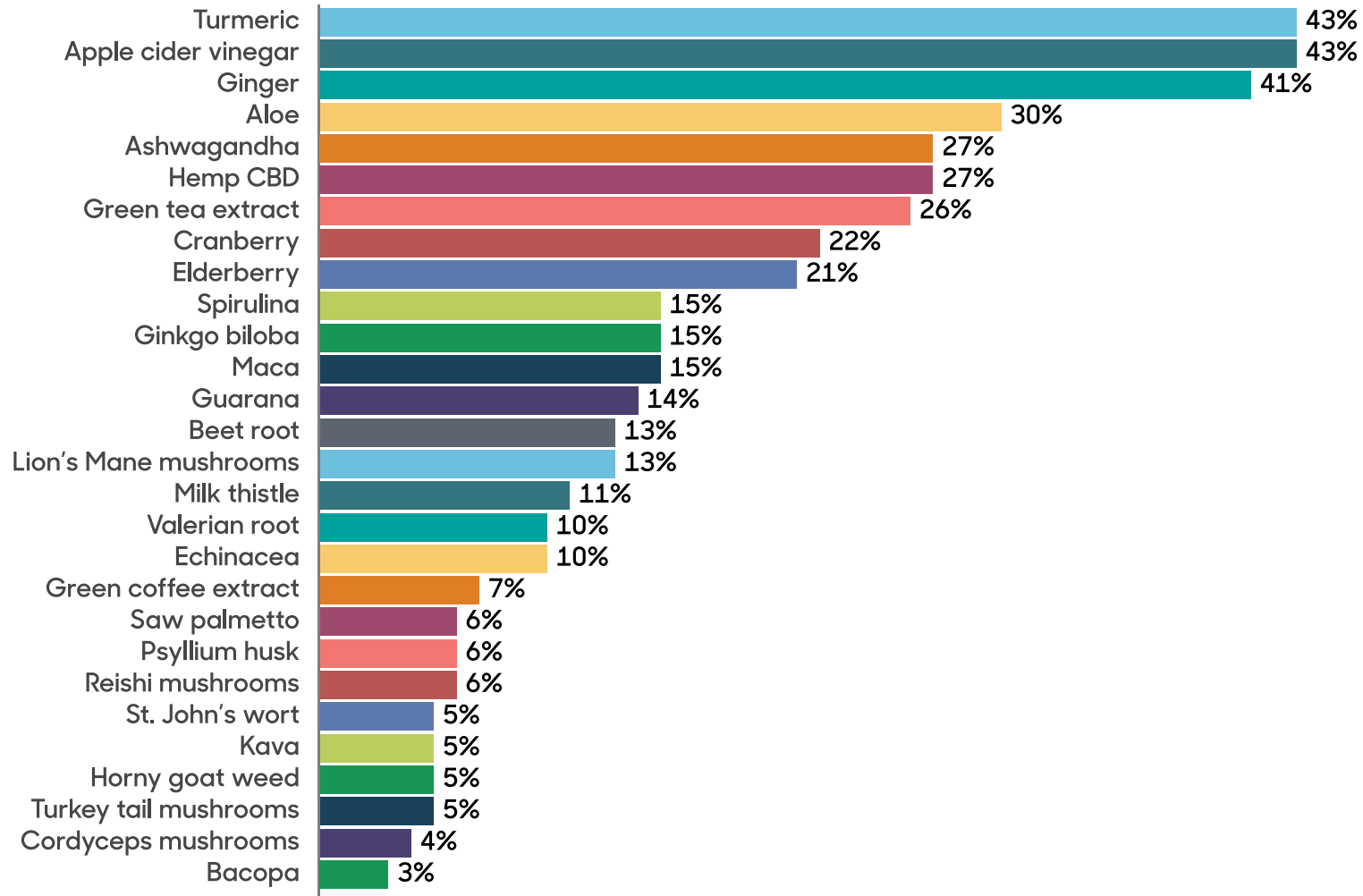
	2020	2021	2022	2023	2024	2025e
E-Commerce	90.8%	29.0%	5.6%	9.3%	10.1%	10.4%
Mail Order, DRTV and Radio	3.4%	-3.5%	-7.9%	-3.3%	-2.3%	-2.1%
Mass Market Retail	18.7%	3.9%	5.7%	5.4%	5.6%	5.9%
MLM-Network Marketing	7.3%	5.2%	-5.5%	0.7%	0.8%	0.6%
Natural and Specialty Retail	2.0%	1.0%	-0.6%	1.5%	2.7%	3.2%
Practitioner	3.8%	6.5%	7.2%	7.7%	7.8%	7.6%
Total	16.7%	7.4%	2.0%	4.5%	5.2%	5.6%

Supplement industry market share by channel, 2020-2025e

	2020	2021	2022	2023	2024	2025e
E-Commerce	17.0%	20.5%	21.2%	22.2%	23.2%	24.3%
Mail Order, DRTV and Radio	3.8%	3.4%	3.1%	2.9%	2.7%	2.5%
Mass Market Retail	26.6%	25.8%	26.7%	26.9%	27.0%	27.1%
MLM-Network Marketing	14.3%	14.0%	13.0%	12.5%	12.0%	11.4%
Natural and Specialty Retail	29.8%	28.1%	27.4%	26.6%	26.0%	25.4%
Practitioner	8.3%	8.3%	8.7%	8.9%	9.2%	9.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Nutrition Business Journal

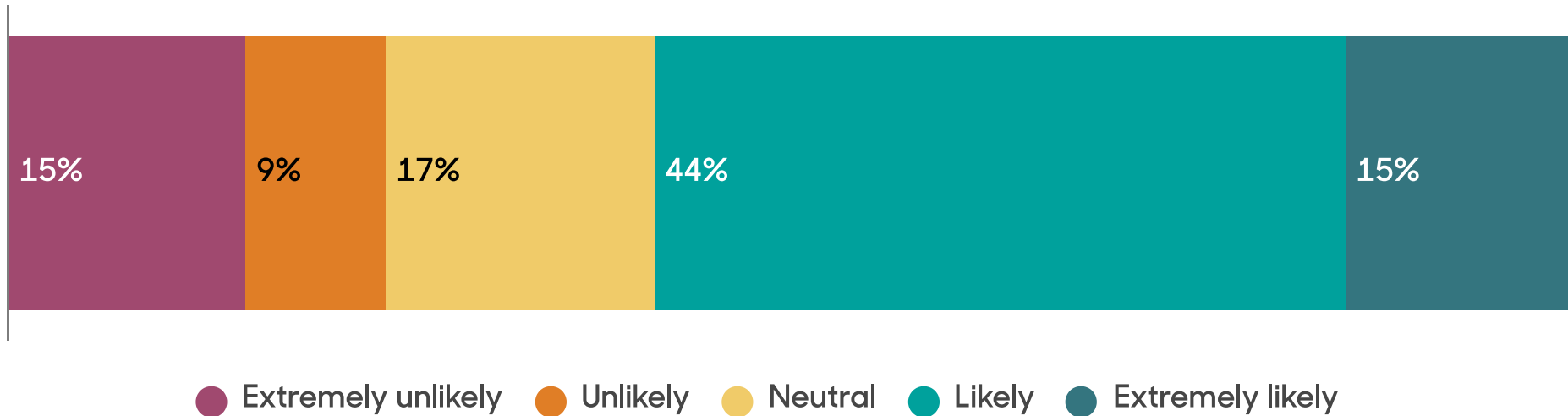
Top herbal supplement ingredients



Source: *Nutrition Business Journal* survey targeting U.S. consumers who take herb and botanical supplements, age 19–75. Completed in March 2025; N=1,024 powered by the Suzy online platform.

Question: "Which of the following herbs and/or botanical supplements do you currently take? (Select all that apply)"

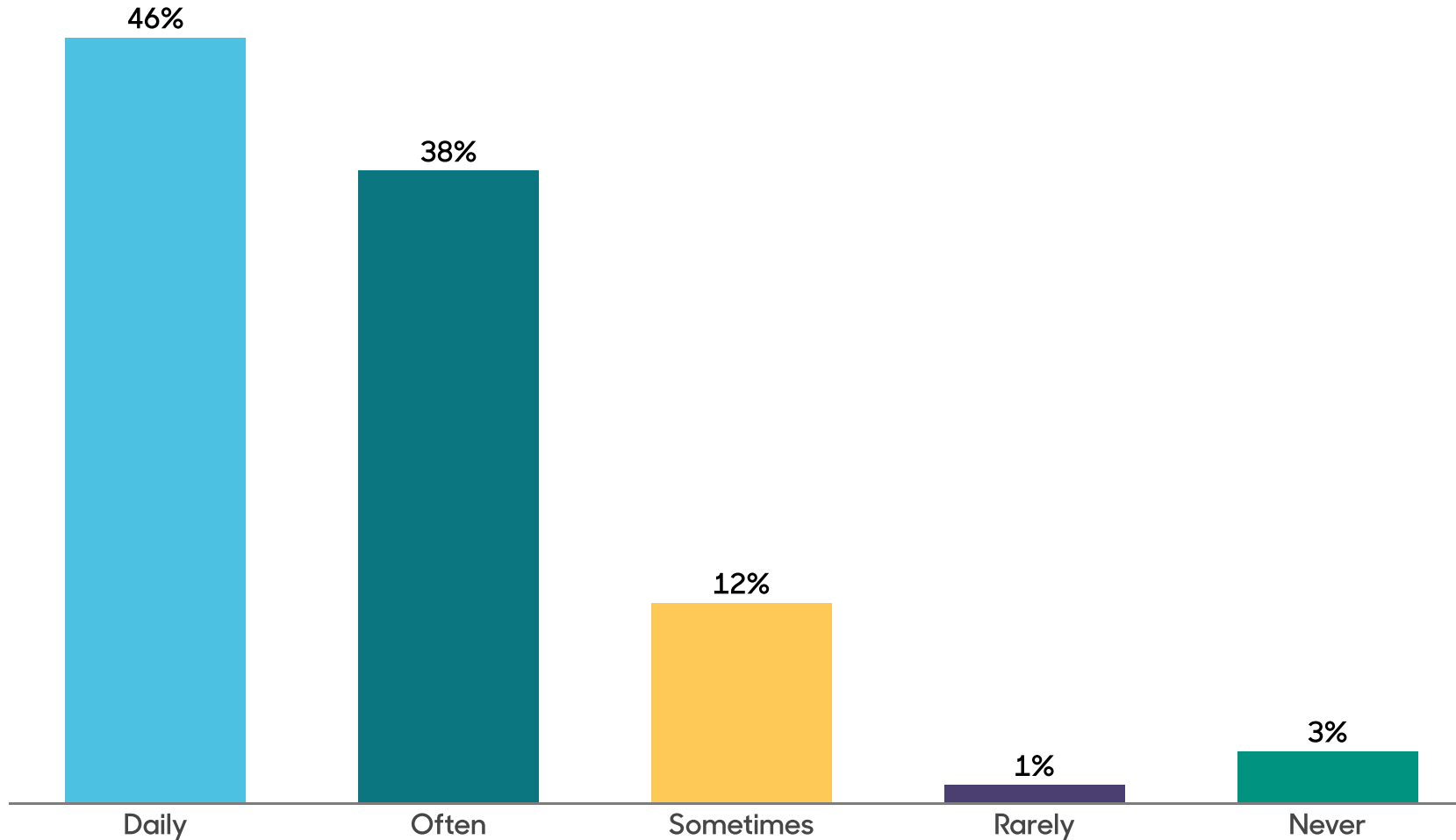
Likelihood of buying herbal supplements



Source: *Nutrition Business Journal* survey targeting average U.S. consumers, age 19-75. Completed in February 2025; N=1,014 powered by the Suzy online platform.

Question: "How likely are you to purchase an herb and/or botanical supplement in the next six months?"

How often current GLP-1 drug users take supplements



Source: *Nutrition Business Journal* survey targeting consumers who said they currently take a GLP-1 medication for weight-related concerns, aged 19-75. Completed October 2024; n=718; powered by the Suzy online platform.

Question: "How often do you currently take dietary supplements (e.g., vitamins, minerals, protein powders, probiotics, etc.)?"

Glowing up

Personal Care showed robust growth in 2024, expanding by 6.7% to reach \$21 billion in sales. While skin care and hair products remain on top, deodorants and oral hygiene are driving the category with strong growth—both are projected to surpass the \$1 billion milestone in 2025.

»» HYGIENIC HEIGHTS

Deodorants are driving Personal Care, showing exceptional 23.1% growth to \$941 million in 2024. According to *NBJ's* survey, deodorant is the top personal care product purchased by natural and organic personal care consumers. Nearly 60% consistently purchase deodorant, while just over 50% buy hair care products and just under half regularly buy skin care.

»» MASS MOMENTUM

Distribution channels show evolving consumer preferences, with Mass Market growing 10.1% to \$6 billion (28.6% market share) and combined E-commerce, Mail Order and Practitioner growing 10% to \$5.2 billion (24.4% market share). Mass Market is rapidly pulling ahead of Natural and Specialty, which has incrementally been losing market share since 2020.

»» SKIN WINS

Skin care leads sales with 33.7% market share (\$7.1 billion), followed by hair products with 26.4% (\$5.6 billion). Skin care and hair care account for 60% of all sales within the category, but deodorant, oral hygiene and feminine care are growing more than twice as fast.

»» FIVE-STAR REVIEWS

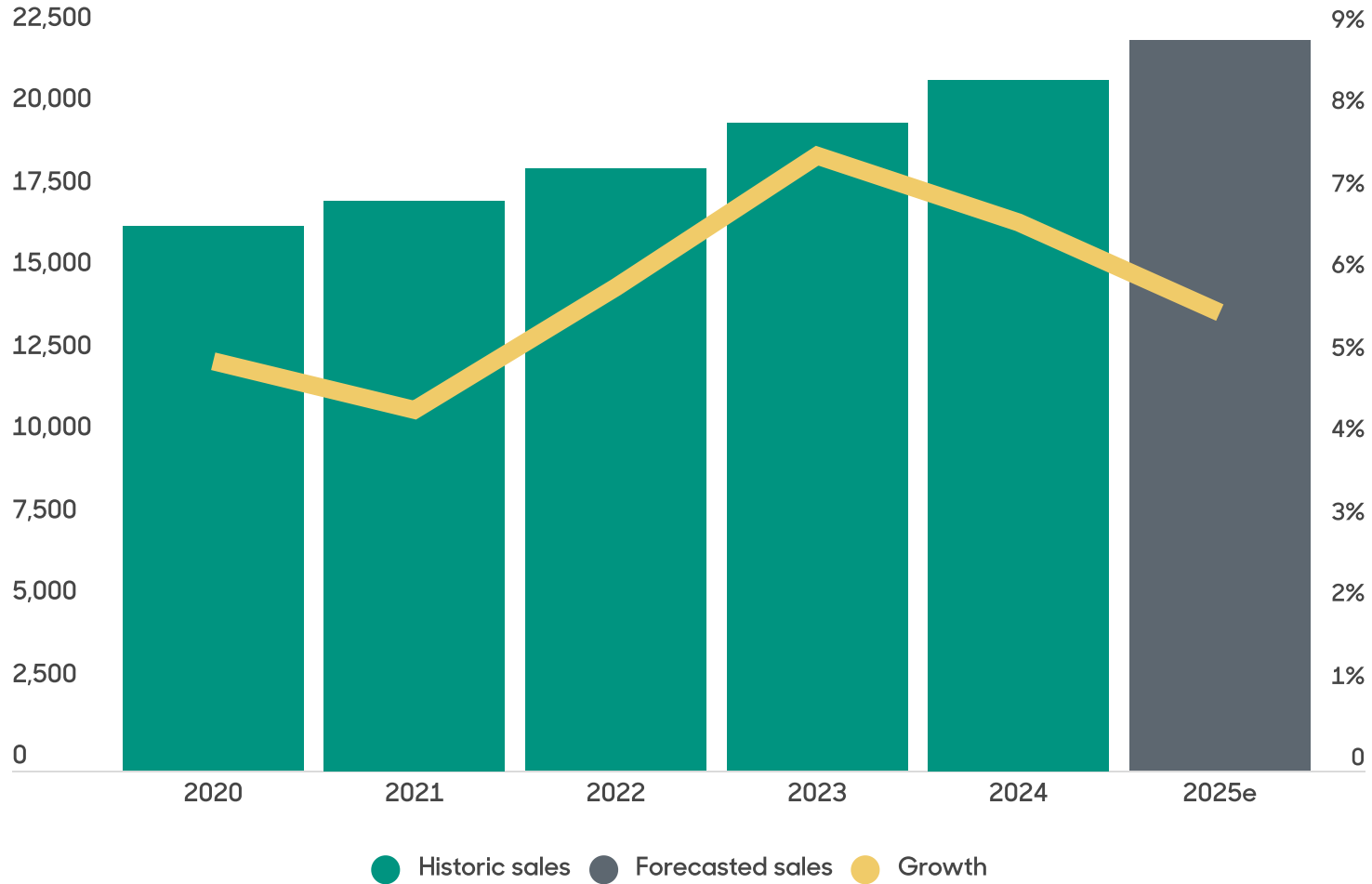
Well over 40% of consumers buy natural and organic personal care products because they believe they're healthier and better for their bodies, and just over 40% say they trust natural and organic products to be of higher quality, *NBJ* consumer research shows.



TRENDING: Inclusive beauty

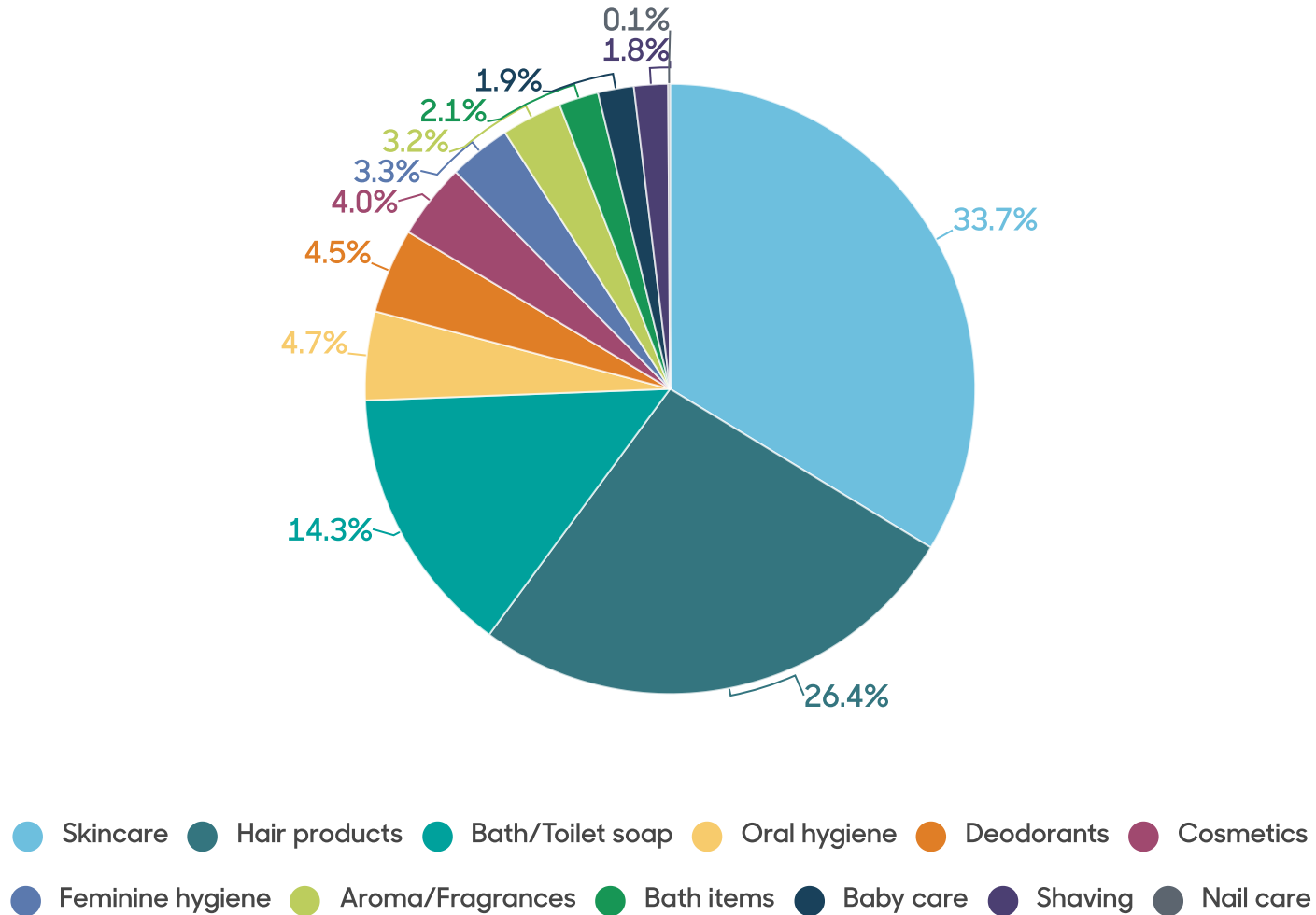
Beauty brands are getting more inclusive, with wider shade ranges for foundations, tinted moisturizers and concealers, products that address concerns like hyperpigmentation and hydration for melanin-rich skin tones, and hair care products with ingredients like amla, fenugreek and castor oil for curly and kinky hair. The needs of older consumers are also being addressed as the industry moves away from “anti-aging” and embraces “healthy aging” with a focus on skin nourishment rather and hormone-sensitive formulations for menopausal and aging skin.

Natural and organic personal care sales and growth, 2020-2025e



Source: Nutrition Business Journal (\$mil, consumer sales)

Natural and organic personal care sales by category, 2024



Source: Nutrition Business Journal

Natural and organic personal care sales by category, 2020-2025e

	2020	2021	2022	2023	2024	2025e
Cosmetics	739	776	782	808	841	864
Feminine hygiene	324	471	569	628	697	767
Hair products	3,948	4,608	4,916	5,281	5,562	5,898
Baby care	325	342	357	371	391	413
Nail care	23	26	26	27	26	27
Oral hygiene	614	647	740	876	984	1,070
Bath items	270	355	377	420	451	479
Deodorants	407	505	571	764	941	1,047
Shaving	227	272	305	350	388	416
Skincare	6,340	6,182	6,445	6,692	7,110	7,450
Bath/Toilet soap	2,640	2,481	2,615	2,846	3,007	3,141
Aroma/Fragrances	777	695	685	701	681	693
Total	16,634	17,359	18,389	19,764	21,079	22,265

Source: Nutrition Business Journal (\$mil, consumer sales)

Natural and organic personal care growth by category, 2020-2025e

	2020	2021	2022	2023	2024	2025e
Cosmetics	-18.8%	5.0%	0.8%	3.3%	4.1%	2.7%
Feminine Hygiene	36.0%	45.2%	20.9%	10.3%	11.0%	10.1%
Hair Products	6.9%	16.7%	6.7%	7.4%	5.3%	6.0%
Baby Care	19.3%	5.4%	4.5%	3.7%	5.6%	5.5%
Nail Care	-13.1%	11.6%	0.4%	1.4%	-0.5%	1.4%
Oral Hygiene	0.4%	5.4%	14.5%	18.4%	12.2%	8.7%
Bath Items	11.9%	31.3%	6.4%	11.2%	7.4%	6.2%
Deodorants	5.4%	24.1%	13.1%	33.8%	23.1%	11.3%
Shaving	3.0%	19.8%	12.1%	15.1%	10.8%	7.2%
Skincare	-3.1%	-2.5%	4.3%	3.8%	6.2%	4.8%
Bath/Toilet Soap	36.7%	-6.0%	5.4%	8.8%	5.6%	4.5%
Aroma/Fragrances	1.3%	-10.6%	-1.4%	2.4%	-2.9%	1.8%
Total	5.0%	4.4%	5.9%	7.5%	6.7%	5.6%

Source: Nutrition Business Journal

Natural and organic personal care market share by category, 2020-2025e

	2020	2021	2022	2023	2024	2025e
Cosmetics	4.4%	4.5%	4.3%	4.1%	4.0%	3.9%
Feminine Hygiene	1.9%	2.7%	3.1%	3.2%	3.3%	3.4%
Hair Products	23.7%	26.5%	26.7%	26.7%	26.4%	26.5%
Baby Care	2.0%	2.0%	1.9%	1.9%	1.9%	1.9%
Nail Care	0.1%	0.2%	0.1%	0.1%	0.1%	0.1%
Oral Hygiene	3.7%	3.7%	4.0%	4.4%	4.7%	4.8%
Bath Items	1.6%	2.0%	2.1%	2.1%	2.1%	2.2%
Deodorants	2.4%	2.9%	3.1%	3.9%	4.5%	4.7%
Shaving	1.4%	1.6%	1.7%	1.8%	1.8%	1.9%
Skincare	38.1%	35.6%	35.0%	33.9%	33.7%	33.5%
Bath/Toilet Soap	15.9%	14.3%	14.2%	14.4%	14.3%	14.1%
Aroma/Fragrances	4.7%	4.0%	3.7%	3.5%	3.2%	3.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Nutrition Business Journal

Natural and organic personal care sales by channel, 2020-2025e

	2020	2021	2022	2023	2024	2025e
Natural and Specialty Retail	3,901	3,769	3,826	4,038	4,208	4,345
Department Store/Boutique/Salon/Spa	1,362	1,668	1,716	1,764	1,820	1,873
Specialty Personal Care Stores	1,071	1,173	1,269	1,363	1,471	1,563
MLM/Network Marketing	2,453	2,534	2,519	2,438	2,397	2,387
Other Direct	4,028	4,116	4,369	4,681	5,151	5,567
Mass Market/Beauty Supply Discounters	3,820	4,099	4,690	5,480	6,033	6,529
Total NOPC	16,634	17,359	18,389	19,764	21,079	22,265

Source: Nutrition Business Journal (\$mil, consumer sales)

Natural and organic personal care growth by channel, 2020-2025e

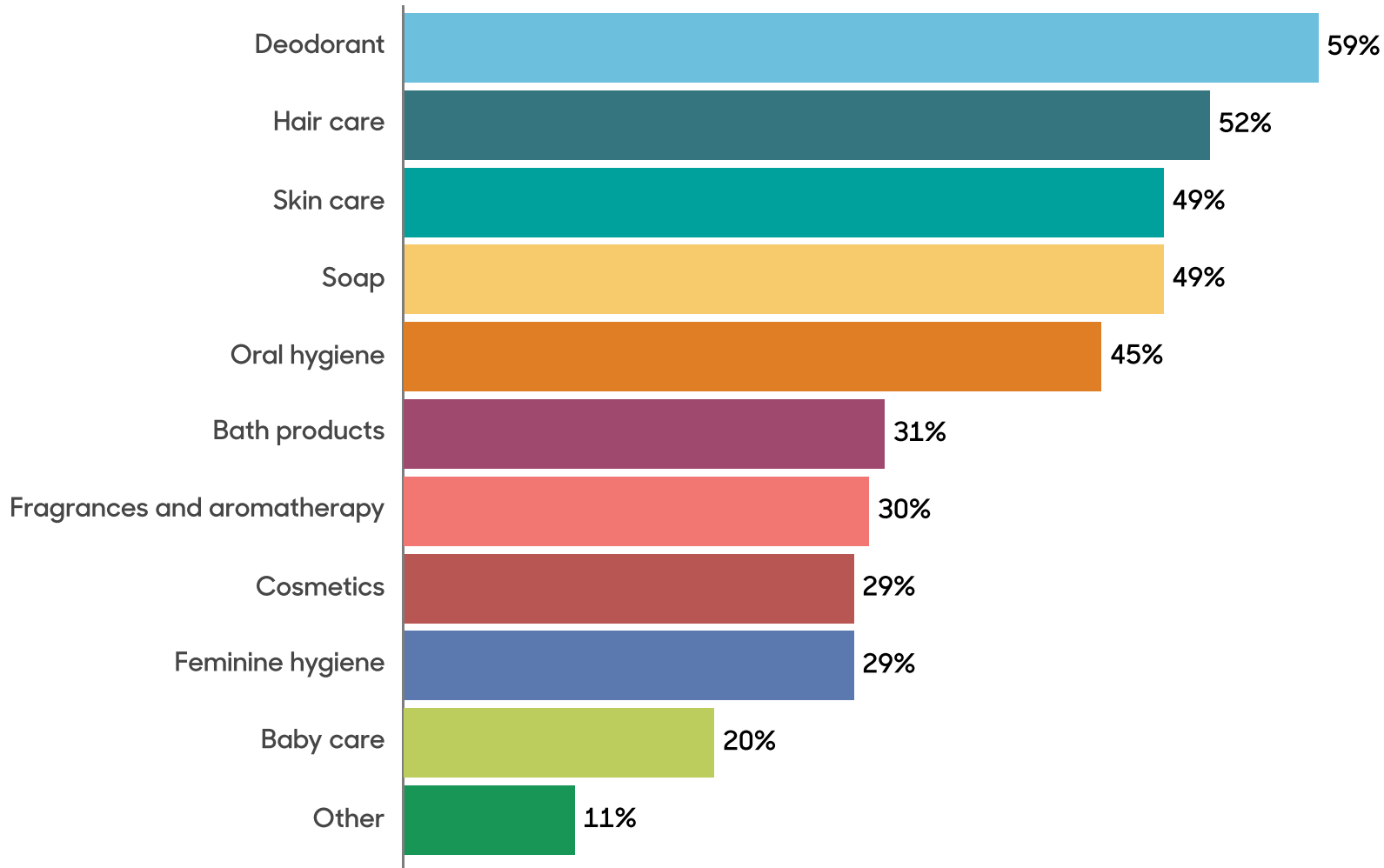
	2020	2021	2022	2023	2024	2025e
Natural and Specialty Retail	-3.1%	-3.4%	1.5%	5.5%	4.2%	3.3%
Department Store/Boutique/Salon/Spa	-21.4%	22.5%	2.9%	2.8%	3.2%	2.9%
Specialty Personal Care Stores	-10.9%	9.5%	8.2%	7.4%	7.9%	6.3%
MLM/Network Marketing	-5.8%	3.3%	-0.6%	-3.2%	-1.7%	-0.4%
Other Direct	32.1%	2.2%	6.1%	7.2%	10.0%	8.1%
Mass Market/Beauty Supply Discounters	18.3%	7.3%	14.4%	16.8%	10.1%	8.2%
Total NOPC	5.0%	4.4%	5.9%	7.5%	6.7%	5.6%

Natural and organic personal care market share by channel, 2020-2025e

	2020	2021	2022	2023	2024	2025e
Natural and Specialty Retail	23.5%	21.7%	20.8%	20.4%	20.0%	19.5%
Department Store/Boutique/Salon/Spa	8.2%	9.6%	9.3%	8.9%	8.6%	8.4%
Specialty Personal Care Stores	6.4%	6.8%	6.9%	6.9%	7.0%	7.0%
MLM/Network Marketing	14.7%	14.6%	13.7%	12.3%	11.4%	10.7%
Other Direct	24.2%	23.7%	23.8%	23.7%	24.4%	25.0%
Mass Market/Beauty Supply Discounters	23.0%	23.6%	25.5%	27.7%	28.6%	29.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Nutrition Business Journal

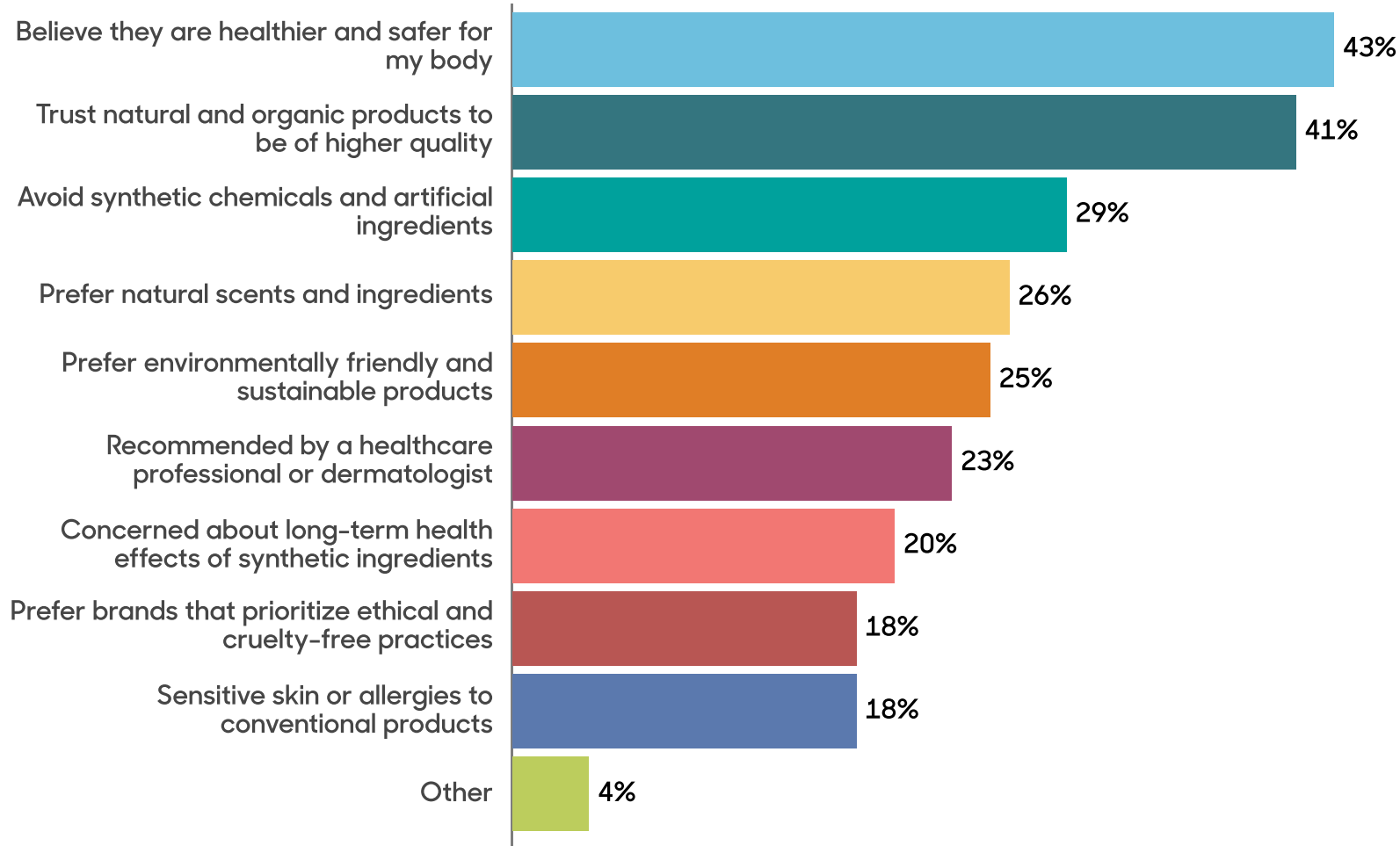
Most popular personal care categories



Source: *Nutrition Business Journal* surveys targeting consumers that purchase natural or organic personal care products, aged 19-75. Completed February 2025; N=960; powered by the Suzy online platform.

Question: "In which of the following product categories do you consistently purchase natural or organic personal care products? Please select all that apply."

Why consumers purchase natural and organic personal care products



Source: *Nutrition Business Journal* surveys targeting consumers that purchase natural or organic personal care products, aged 19-75. Completed February 2025; N=946; powered by the Suzy online platform.

Question: "Why do you use natural or organic personal care products? Select all that apply."

Acknowledgments and definitions



New Hope
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Acknowledgments

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Most importantly, we thank all of the companies *Nutrition Business Journal (NBJ)* has interviewed since we published our first issue of *NBJ* in 1996 and the companies that have participated in our annual quantitative surveys over the years. Our ability to collect, analyze and present data and information is a function of the cooperation of the companies in the industry, and we are grateful for their participation.

Research methodology

The market-sizing estimates in this report were produced by *Nutrition Business Journal*. *NBJ's* basic methodology for nutrition industry quantification has been a complete compilation and assessment of existing data on the industry, augmented by *NBJ* surveys and interviews. Data is compiled and analyzed at each level of the value chain: consumer spending data, retail sales figures, alternative channels (*NBJ* surveys on MLM/network marketing, mail order/DRTV/radio, practitioner and e-commerce sales), distributor data and interviews, manufacturer sales (*NBJ* surveys) and raw material supplier data (*NBJ* surveys). Individual company data is also collected through surveys or secondary sources. *NBJ* also conducts interviews with executives every month to capture both qualitative and quantitative information.

NBJ's business segment survey methodology starts with an understanding of the total universe of companies in that segment. *NBJ* then makes every effort to ascertain annual sales of the top firms and get an adequate response from surveying the remaining populace to build a statistically valid model for that segment.

Although *NBJ* has made every effort to be accurate in its data collection and presentation, it is impossible to be perfect and the authors beg your understanding of any inaccuracies that appear in this report. In addition, since *NBJ's* data is constantly updated based on best available figures, in some cases previously published numbers may be inconsistent with the data in this report. Conversely, data in future *NBJ* issues and reports will represent best available data as of that time. If you have questions regarding sources and/or methodology, contact Erika Craft at erika.craft@informa.com.

Disclaimer

New Hope Network understands that some of the categorizations or analysis in this report may not agree with that of our readers. *NBJ* conducts a variety of surveys and interviews with companies and accesses data in many forms to help provide sales figures for as many companies as possible.

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Definitions

Natural and organic products industry: *NBJ* defines the natural and organic products industry by its four main product categories: Dietary Supplements, Natural & Organic Foods, Functional Foods, and Natural & Organic Personal Care and Household Products.

Product categories

Dietary supplements: For this report, *NBJ* defines dietary supplements by four main product categories: vitamins and minerals, herbs and botanicals, sports nutrition and meal supplements and specialty and other supplements.

Natural and organic foods: Natural foods focus on the health benefits of foods derived from natural sources and that are, to varying degrees, free of pesticides, additives, preservatives and refined ingredients. Organic foods, sometimes “certified organic,” are not only free of chemicals, pesticides, hormones and antibiotics but go beyond the human health consequences of conventional farming and food manufacturing to embrace principles of sustainable farm management, humane treatment of animals and the social impacts of food production.

Functional foods: Because “functional foods” and “nutraceuticals” are essentially marketers’ terms and not recognized in law or defined in any dictionary, market researchers tend to use them inconsistently. *Nutrition Business Journal* defines functional food as food fortified with added or concentrated ingredients to a functional level, which improves health and/or performance or products marketed for their “inherent” functional qualities. They include some enriched cereals, breads, sports drinks, bars, fortified snack foods, baby foods, prepared meals and more. If a food could be considered both organic and functional, *NBJ* categorizes it as an organic food.

Natural and organic personal care (N&OPC): *NBJ*’s broad, inclusive accounting of the natural and organic personal care industry defines N&OPC as health and beauty products derived from natural & organic sources and that are, to varying degrees, free of pesticides, additives, preservatives and refined ingredients. Natural & Organic Personal Care products include shampoos, soaps, lotions, cosmetics and other natural toiletries.

Other natural household products: This category includes all natural and organic household cleaners, natural and organic pet food, organic flowers and organic fibers (linens and clothing).

Dietary supplements

Vitamins and minerals: Single and multivitamin/mineral supplements made of natural or synthesized vitamins. Products in the vitamin category include vitamin C, vitamin E, B vitamins, vitamin A/beta carotene, niacin, folic acid, multivitamin formulas and other single vitamins. Products in the mineral category include calcium, magnesium, chromium, zinc, selenium, potassium, iron, silica, manganese, boron, choline, iodine, phosphorous, copper, dolomite, multi-minerals formulas and other single minerals.

Herbs and botanicals: Single herb or multi-herb supplements made primarily from plants or plant components as well as mushrooms and mycological components. Products in this category include: echinacea, garlic, ginseng, ginkgo biloba, super fruits and many more.

Specialty supplements: Supplements that do not fit into the other supplement subcategories, including glucosamine, melatonin, DHEA, fish oils/shark cartilage, bee products, CoQ10, 5HTP, amino acids, homeopathic remedies, SAME, chondroitin, probiotics, prebiotics, colostrum, other oils, other enzymes, other hormones, etc.

Meal supplements: Shelf-stable nutritional formulas created primarily to substitute, but sometimes supplement, a meal. Some are enteral feeding formulas and some are weight loss formulas. Occasionally some are sold for medical purposes to frail or intestinally challenged people. Meal supplement products sold at retail include SlimFast, Ensure, Nestlé Sweet Success, Boost, Pedia Sure and Sustacal.

Sports nutrition: Sports Nutrition products include all pills, powders/formulas and drinks (excluding Gatorade, Powerade, etc.) formulated to enhance physical activity whether it be endurance, strength, speed or other athletic states. Sports nutrition products include: creatine, amino acids, protein formulas, fat burners, ribose, HMB and rostenedione and many others.

Food and beverage

Dairy: Milk, cheese, eggs, butter, yogurt, sour cream, cottage cheese, ice cream and other fresh, canned or frozen dairy products.

Fruit and vegetables: Fresh, frozen, canned and dried fruits and vegetables.

Breads and grains: Fresh, refrigerated and frozen bread, baked goods, baking needs, dry breakfast foods (cereal), pasta, rice and other dried grains.

Meat, fish, poultry: Fresh, frozen and canned meat, fish and poultry.

Beverages: Fresh, frozen and RTD juice, soft drinks, alcoholic beverages, tea, coffee and dairy alternatives.

Snack foods: Candy, gum, nuts, salty snacks such as chips, and nutrition bars.

Packaged/prepared foods: Frozen, refrigerated, canned and dried prepared foods, service deli, jams and jellies, meat alternatives, baby food and formula, canned and dry soup, pasta sauce and desserts.

Condiments: Dressings, spreads, sauces, spices, fats and shortenings and sweeteners.

Natural and organic personal care

Health and beauty care (HBC): All conventional personal care products, including those made with natural, organic and functional ingredients. Products in the HBC category include cosmetics, feminine hygiene, hair products, baby care, nail care, oral hygiene, bath items, deodorants, shaving, skin care, bath/toilet soap and fragrances.

Skin care: Natural or organic facial care products, including lotions, cleansers, toners, exfoliants and masks, lip balm, hand and body lotions, foot care, sunscreen, tanning products and insect repellants.

Hair care: Natural or organic shampoo, conditioner, styling products, hair spray, hair colorants and hair accessories such as brushes, barrettes and clips.

Soap: Natural or organic liquid and bar soap, shower gel and body wash.

Oral hygiene: Natural or organic toothpaste, mouthwash, whiteners, dental floss and other dental accessories.

Cosmetics: Natural or organic cosmetic products such as foundation, eyeliner, mascara, concealers, lipstick and blush.

Fragrances and aromatherapy: Natural or organic perfumes, essential oils and massage oils.

Deodorants: Natural or organic solid, roll-on, gel, powder, spray and crystal deodorants.

Baby care: Natural or organic baby shampoos, lotions, diapers, diaper rash creams and diaper wipes.

Bath products: Natural or organic bath gels, bath salts, bubble bath, loofah, bath puffs and bath brushes.

Shaving: Natural or organic shaving cream, aftershave and razors.

Feminine hygiene: Natural or organic menstrual pads, tampons and washes.

Nail care: Natural or organic nail polish, polish remover, nail files and cuticle creams.

Other household products

Household cleaners: Natural, organic, eco-friendly or green liquid laundry products; dishwashing products; bath, kitchen and other cleaners; powder laundry products; cleaning supplies and air fresheners.

Pet food: Natural or organic pet food, treats, chews and rawhide.

Fiber: Organic clothing and linen, such as bedding, towels and table linen.

Flowers: Flowers grown according to organic standards.

Sales channels

Natural and specialty retail: This channel represents natural and health food stores, supplement stores and specialty retail outlets, such as Whole Foods and GNC.

Mass market: The mass market channel represents conventional grocery, drug, mass merchandise, club and convenience stores. Examples include Walmart, Target, Kroger, CVS, Costco and 7-Eleven.

Multilevel marketing (MLM): Covers multilevel and network marketing companies (NuSkin, Avon, Herbalife, etc.). Also known as direct selling, the Multilevel Marketing channel consists of products or services marketed person to person by independent salespeople. Salespeople are commonly referred to as distributors, representatives and consultants. Products are sold primarily through in-home product demonstrations, parties and one-on-one selling.

E-commerce: E-commerce captures sales from internet retailers (Amazon, walmart.com, Thrive Market, iHerb) and purchases directly from brand websites.

Mail order/DRTV/radio: Mail order sales are defined as consumer purchases of nutrition products from direct-to-consumer sellers that utilize catalogs, direct mail or infomercials to reach their customers and facilitate sales.

Practitioner: Practitioner sales consist of products sold to consumers by practitioners, including but not limited to conventional medical professionals (MDs, GPs, etc.), chiropractors, naturopaths, acupuncturists, homeopaths, massage therapists and through gyms and fitness clubs.

Department store/boutique/other: High-end department store/boutique brands and salon/spa or "practitioner" sales (Aveda, Dr. Perricone).

Specialty personal care stores: Specialty personal care stores (the Body Shop, Sephora, Bath & Body Works) that sell primarily personal care products.

Mass market beauty: Mass market (supermarkets, drug, mass merchandiser, club and convenience stores) and beauty supply discounters.