by A. Elizabeth Sloan

Supplements Signal a **New Mix of Nutritional Priorities**

The U.S. and global dietary supplement industries, with sales of $43 billion and $128 billion, respectively, in 2017, according to the *Nutrition Business Journal*, have long been the proving ground for identifying new opportunities and ingredients for fortified/functional foods and beverages. Euromonitor reports sales of U.S. fortified/functional foods topped $60 billion in 2018 and projects that global sales will skyrocket from $262 billion in 2018 to $290 billion by 2021.

Three-quarters of consumers use dietary supplements, according to the Council for Responsible Nutrition's (CRN) *2018 Consumer Survey on Dietary Supplements.* While those aged 55-plus remain the most likely to use supplements, recent growth has been driven by younger adults. Supplement use among those aged 35–54 rose 11% over the past five years. And among supplement users, 83% of those aged 18–34 take a multivitamin, up 8% from the prior year's survey.

Today's list of the most used supplements looks far different than it did just a few years ago. Multivitamins head the list; they are taken by 98% of supplement users. Other popular supplements include vitamin D, taken by 38% of users; vitamin C, 30%; calcium, 26%; B-vitamins/B-complex, 26%; protein, 22%; magnesium, 20%; omega-3s, 20%; probiotics, 17%; green tea, 16%; vitamin E, 15%; fiber, 14%; and turmeric, 14%.

Vitamin D, which crossed the $1 billion mark, leads dollar growth among traditional single vitamin sales, followed by vitamin A/carotenoids, B vitamins, and vitamin C. Although calcium and magnesium each remain $1 billion-plus supplement categories, selenium led mineral gains, followed by magnesium and chromium, per *Nutrition Business Journal*.

Those aged 55-plus are the most likely to take vitamin D (46%), calcium (32%), and magnesium (24%). Millennials are most likely to use protein supplements (36%), vitamin C (33%), fiber (20%), and green tea (16%), per CRN. Among those aged 35–54, B vitamins are most popular.

While one in five adults admits that they don't think they get enough of their basic vitamins and minerals, even more consumers (30% of Gen Xers, 27% of Millennials, and 24% of adults overall) feel they don't get enough specialty nutrients, according to the Food Marketing Institute's *2018 U.S. Grocery Shopper Trends* report.

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Probiotics, omega-3s, coenzyme Q10, glucosamine, and melatonin are the largest specialty supplement categories, per *Nutrition Business Journal.* Melatonin is a supplement superstar; use is up 50% over the past five years, per CRN.

Sales of probiotics supplements are projected to reach $4 billion in 2021, with annual growth of 10% from 2019 to 2021, and sales of omega-3 fish/animal oil supplements are expected to top $1.3 billion, per *Nutrition Business Journal*.

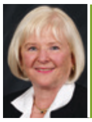
Cold/flu/immune health, followed by digestive health, heart, bone, joint, and diabetes were the largest condition-specific supplement categories in 2017, per *Nutrition Business Journal.* Supplements to benefit digestion; sleep; diabetes; liver health; and hair, skin, and nails are among the fastest growing.

Brain health/cognition/alertness topped the list of the largest new opportunities for targeted nutrition products in a 2017 *Nutrition Business Journal* survey of nutraceutical manufacturers. It was followed by digestive health, healthy aging, weight management, diabetes, immunity, joint health, mood, and heart health.

Multivitamins account for 39% of the ingredients used in vision supplements, followed by lutein, which accounts for 27%. Eye health products are a missed opportunity for food/beverage marketers. Similarly, B vitamins represent nearly half (45%) of total hair, skin, and nails supplement ingredients, per *Nutrition Business Journal*. Collagen is driving growth in the beauty-from-within category.

With 70% of supplement users exercising regularly and a new demographic of fit consumers driving sports supplements mainstream, it's not surprising that sports nutrition/energy/weight loss is the largest supplement category. One-third of supplement purchasers use a sports supplement, up from 29% in 2017. Sales of sports nutrition/protein powders reached $5.4 billion in 2018 and are projected to reach $6.5 billion by 2021, according to *Nutrition Business Journal*. Sports and energy beverages grew 4% to reach $23 billion. Sales of hardcore functional sports drinks topped $800 million and are projected to enjoy sales growth of 15% through 2021, per *Nutrition Business Journal.*

Herbals and botanicals are the fastest-growing supplement category, taken by 41% of users, up 13% versus five years ago, per CRN. Herbal supplement sales reached an all-time high of just over $8 billion in 2017, up 8.5%, according to American Botanical Council data. Best sellers in mass channels include horehound, echinacea, cranberry, ivy leaf, and turmeric supplements. **FT**



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