

WHERE HEALTH AND INGREDIENT INSIDERS ARE BETTING ON

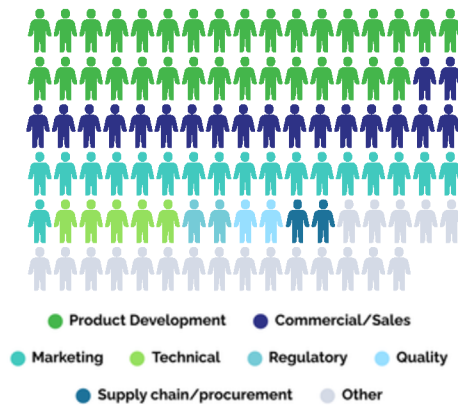
INNOVATION, INVESTMENT AND IMPACT

Every year, the natural products industry generates a lot of noise that often needs to be distilled into discrete signals. Some of these signals include consumer trends, ingredient launch patterns, retailer shifts, and clinical research focal areas. What's harder to find is what experienced insiders actually think about where it's all heading.

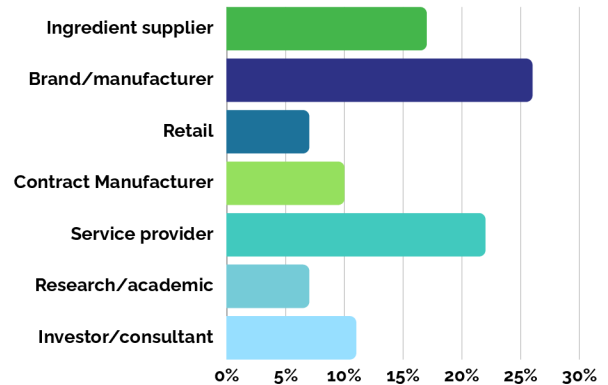
49%

of respondents have more than 20 years of experience in natural products.

ORGANIZATION TYPE:



PRIMARY ROLE:



WHERE INDUSTRY FOCUS IS GOING:

THE INDUSTRY HAS PLACED ITS BETS ON FOUR TARGET AREAS:



48%
MICROBIOME



43%
ACTIVE AGING



39%
METABOLIC HEALTH



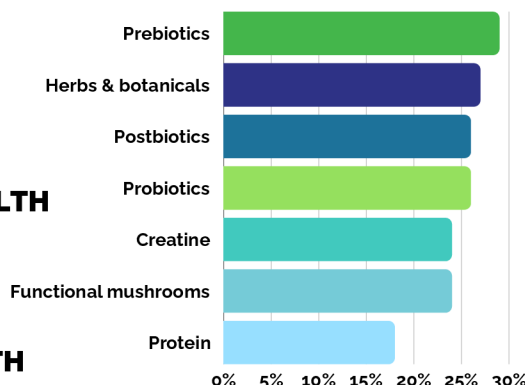
38%
WOMEN'S HEALTH

PRIMARY DRIVER OF INDUSTRY FOCUS:

Consumer demand is driving industry focus by a wide margin with **82%** of respondents citing it as the primary factor. Interestingly, it is not competitive pressure, regulatory clarity, or retail momentum. Consumers are pulling the industry forward.



WHERE THE BETS ARE PLACED:



POSTBIOTICS

THE ONE TO WATCH:

Postbiotics don't require live organisms, which challenges the long-standing assumption that efficacy depends on 'bugs' being 'alive'. They're more shelf-stable, easier to formulate with, and the science connecting them to gut health, skin, immunity, and respiratory function is growing fast.

The definition hasn't fully settled (and may never settle) at the consumer level, but the opportunity is ahead of the awareness.

THE PARADOX:

#1 DRIVER OF INDUSTRY ATTENTION:

82% cite consumer demand as the primary factor driving strategic focus.

#1 BARRIER TO INDUSTRY PROGRESS

53% say consumer confusion is the biggest thing slowing the industry down.

→ **54%** of our industry respondents said that "too many similar products with unclear differences" prevents consumers from buying confidently.

→ **39%** cite mistrust of marketing and industry messaging as a problem they are concerned about.

THE CONSUMER SIGNAL:

ITC's 2025 Consumer Supplement Survey adds context from the other side - the consumer perspective. **83%** of US consumers say brand transparency greatly or somewhat increases their likelihood of purchase, a statistic ITC has watched climb steadily since 2020. When asked what builds trust in a supplement brand, consumers cite clinical research on the ingredient as a top response.

THE OUTLOOK:

0%

expect investment or innovation to decrease over the next 3 years.

94%

are very or moderately confident in the overall growth outlook.

71%

expect investment or innovation activity to increase over the next 3 years.

These aren't newcomers reading trend reports. Nearly half of respondents (49%) have been in natural products for more than 20 years.



When veterans are *this* aligned on growth, that's a signal worth paying attention to.



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Survey conducted February 2026. 102 complete responses from industry professionals across ingredient suppliers, brand/manufacturers, service providers, contract manufacturers, retail, and research/academic roles. 49% of respondents have more than 20 years of industry experience. Data weighted equally per respondent.