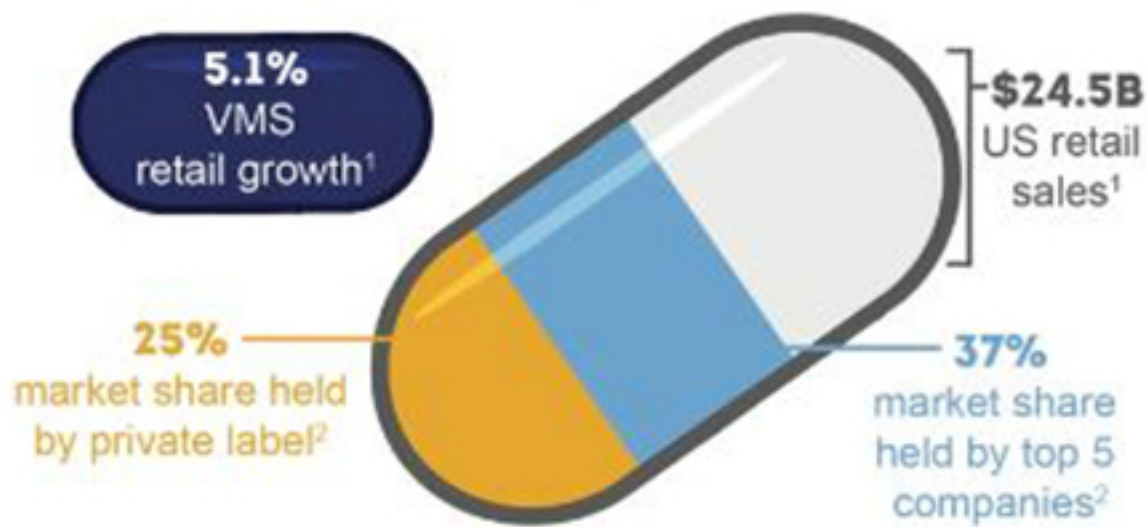
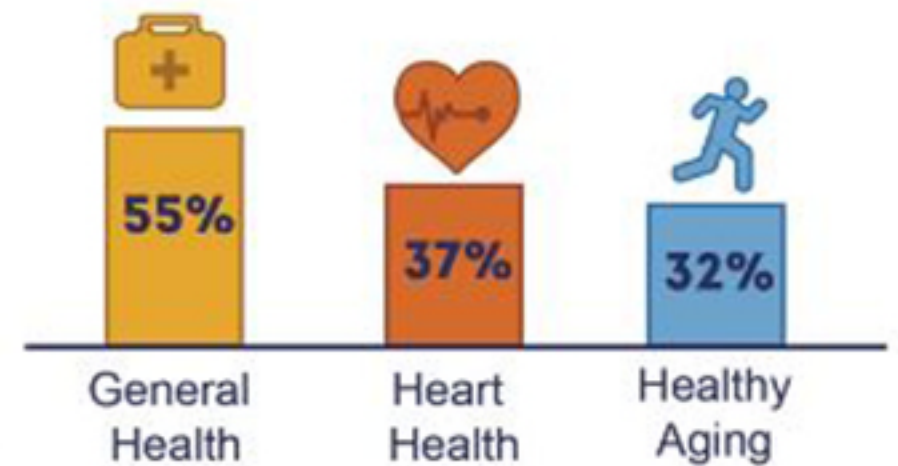


OUR VIEW ON THE **US SUPPLEMENT MARKET**

US Vitamin, Mineral & Supplement (VMS) 2018 Market Summary

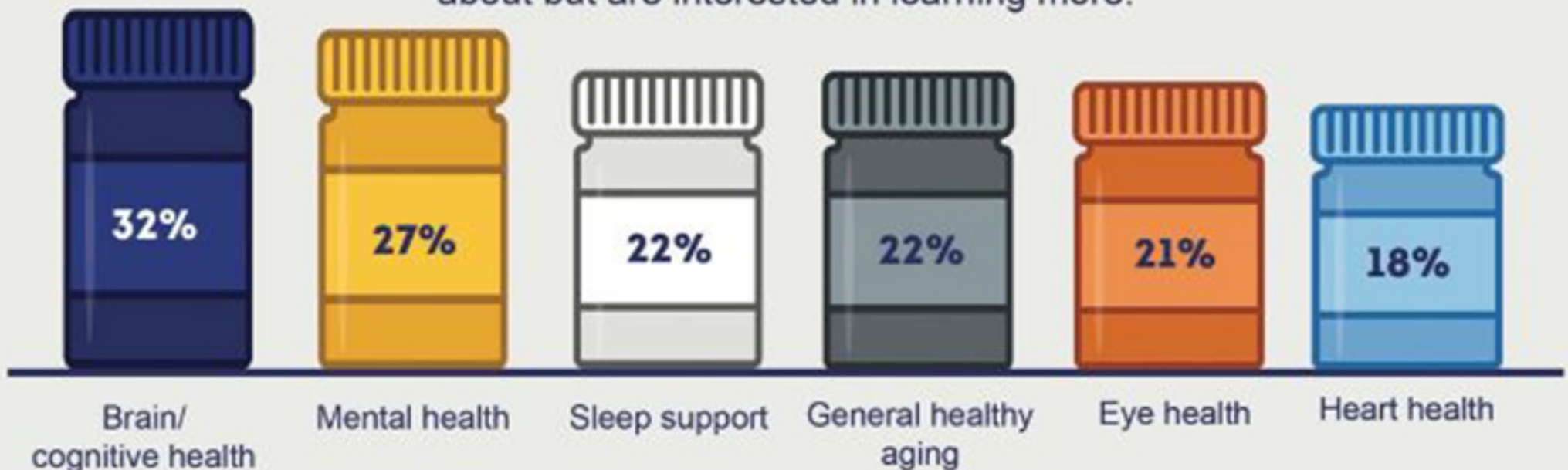


Top 3 Health Benefits Most Important to US Supplement Consumers³

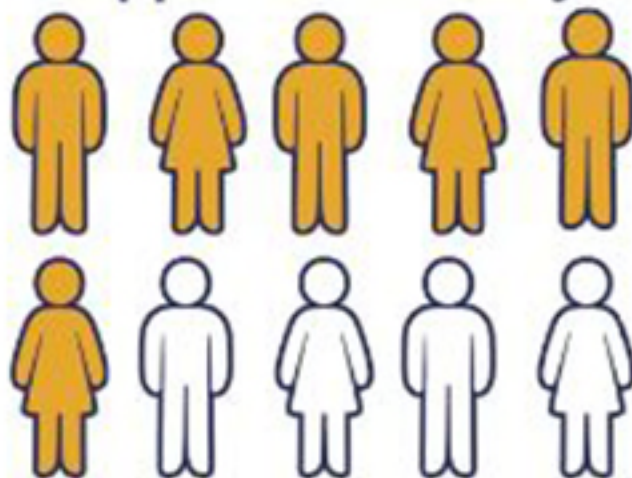


Cognitive Health Is the Highest Ranked Health Benefit US Supplement Consumers are Interested in Learning About³

% of US Supplement Consumers indicating which health benefits they do not know much about but are interested in learning more.



Nearly 60% of US Supplement Consumers Take Their Supplements Daily³



Non-pill Formats Nearly 1/3 Market Share

US market share by delivery format, 2019²

