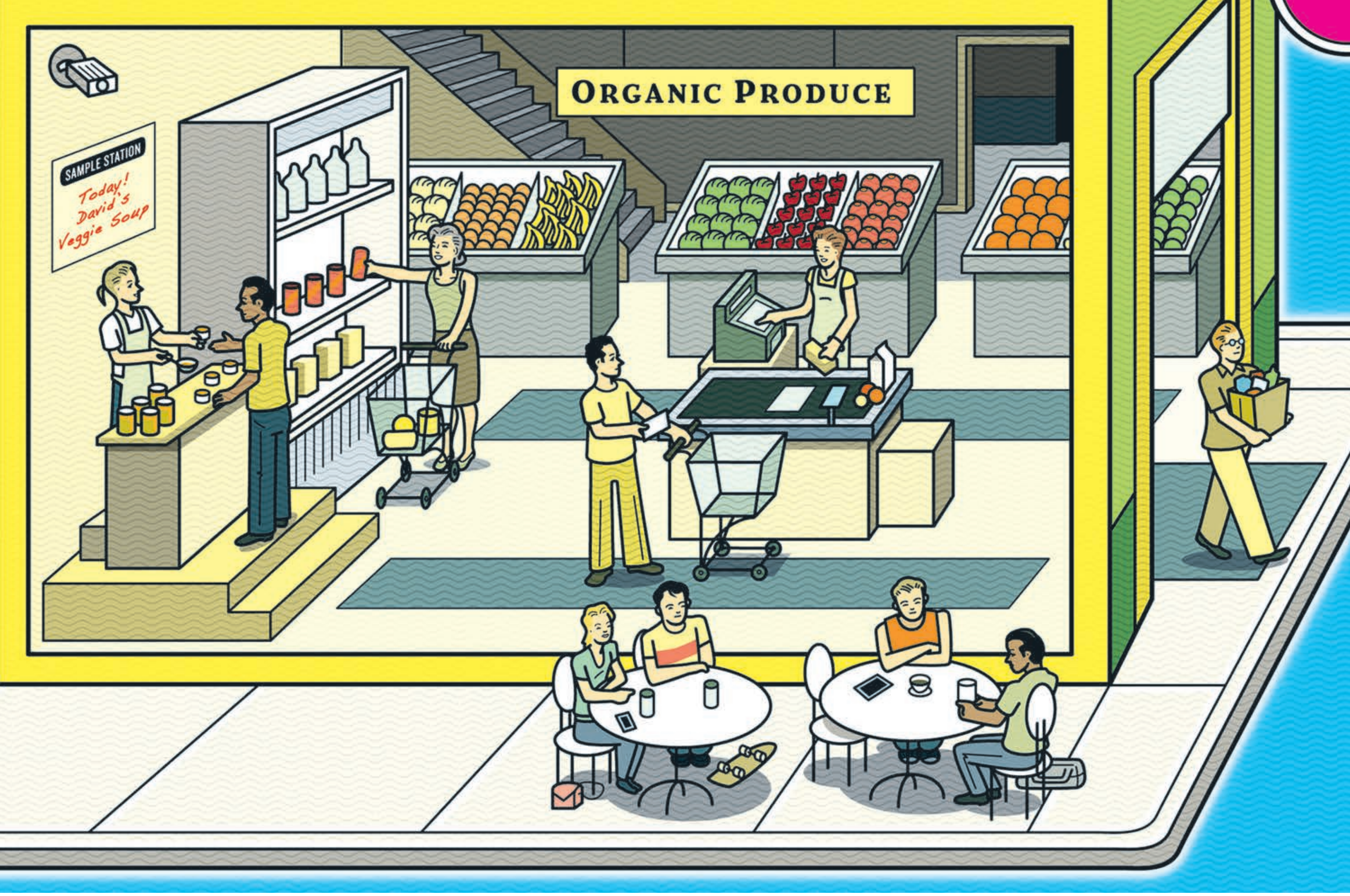


ILLUSTRATION BY PETER AND MARIA HOEY / COINOP

Protein, pixels and purchasing power: Decoding today's natural products consumer

How generational divides and digital disruption are transforming a $325.2 billion industry

BY DOUGLAS BROWN

Just 15 years ago, most brands competing in the natural and organic products (NOP) industry trained much of their focus on two key factors: retailers aligned with the space and a reasonably well-understood consumer base. Nailing sales hinged on getting products into natural products stores and leveraging well-tread marketing strategies to appeal to everyone from high schoolers to suburban moms to college-town retirees.

It all seems quaint today.

The retail landscape has fragmented dramatically, with conventional grocery stores, big-box behemoths, online outlets and social media now selling pouches of organic buckwheat crackers and tubs of cashew yogurt. And just as fragmentation defines the industry's retail landscape, so does it capture today's consumers—including how they learn about products. Marketing revolves around videos posted on TikTok and Instagram, celebrity collaborations, SEO protocols and more, with AI-boosted strategies already blossoming.

Meanwhile, a pair of generations that grew up with the internet and smartphones—millennials and Gen Z—represent the heart of the consumer base that NOP brands seek to charm and turn into customers. However, consumers back in 2010 were easier to study and squeeze into sense-making frames. Today, it's challenging.

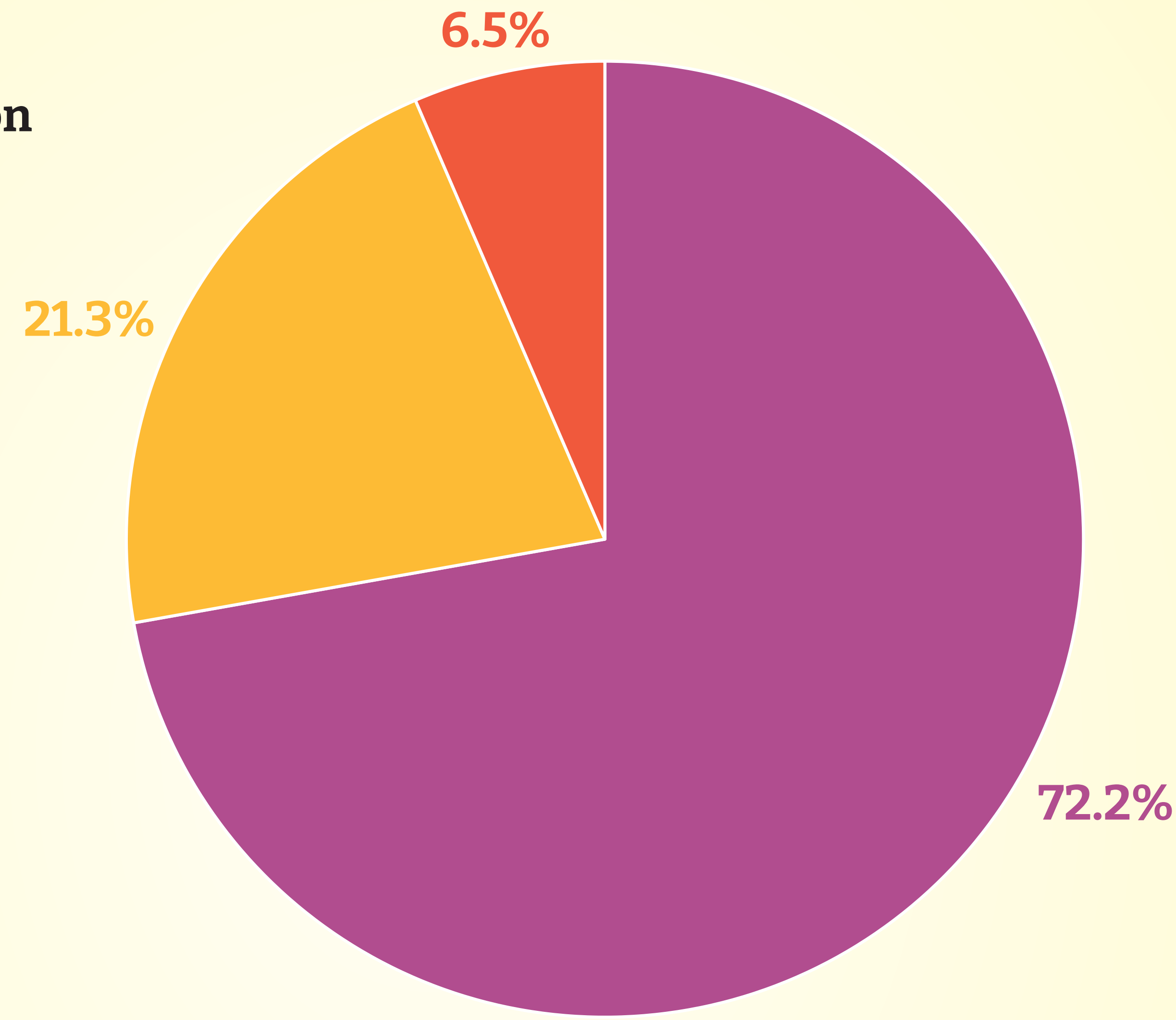
We're here to help you piece together the puzzle. Our annual market overview offers a wide-lens view of the $325.2 billion natural and organic products industry, as well as close-ups of different aspects of this robust marketplace that encompasses everything from multivitamins to regenerative yogurt to fair-trade lip balm and plant-based meats. The overview depends on data from New Hope Network's *Nutrition Business Journal*, which digs deep into the broad categories of food and beverage, personal care and supplement products, as well as subcategories such as dairy, adaptogens, snacks, probiotics, deodorant and hair products.

In addition, this year we conducted consumer surveys probing generational differences surrounding purchasing habits, AI, certifications and a whole lot more. In all, the data and analysis provide natural and organic product players with a sharp profile of how the industry is evolving—and rapidly so. As stakeholders navigate such swift changes on myriad fronts, we hope the insights around these consumer surveys, found on the following pages, provide anchors in the increasingly stormy seas.

The big picture

After growing 5.7% in 2024, the natural and organic industry is projected to expand by 5.4% in 2025.

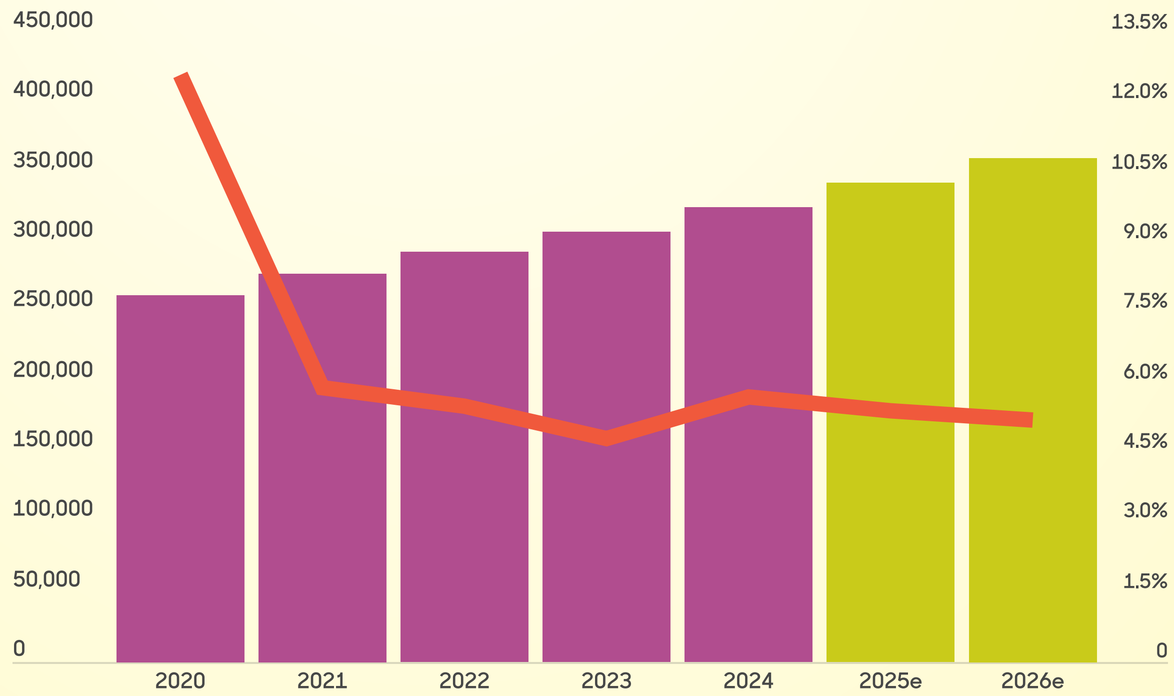
The $325.2 billion natural and organic products industry by category, 2024



- Natural, organic and functional food and beverage
- Dietary supplements
- Natural and organic personal care

Source: Nutrition Business Journal

Natural and organic products industry sales and growth, 2020-2026e



- Historic sales
- Forecasted sales
- Growth

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

THE BIG PICTURE

Natural and organic products industry sales by category, 2024-2026e

	2024	2025e	2026e
Dietary Supplements	69,281	73,128	77,376
Natural, Organic and Functional Food and Beverage	234,844	247,311	259,633
Natural and Organic Personal Care	21,079	22,265	23,464
Total	325,205	342,705	360,473

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

THE BIG PICTURE

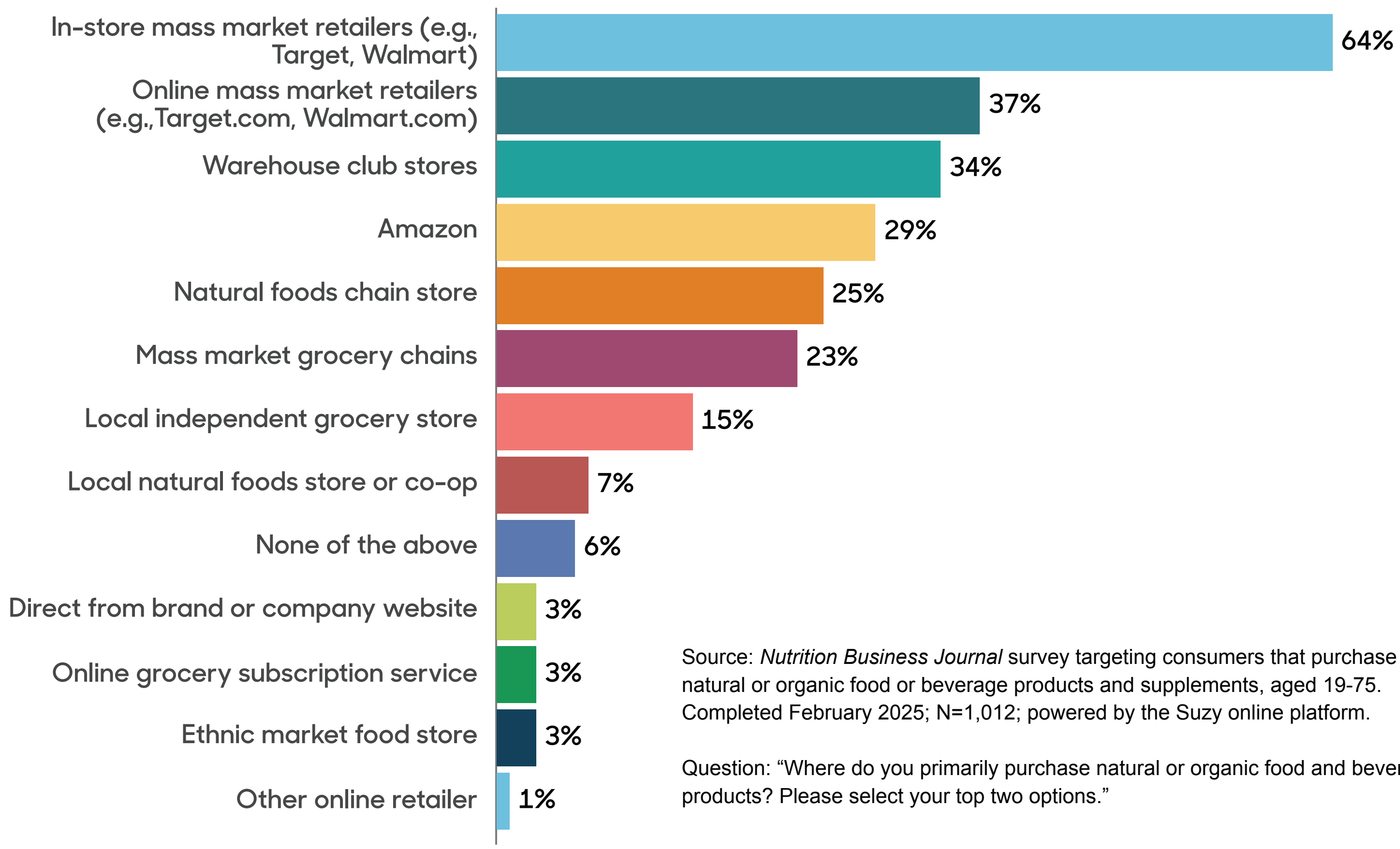
Natural and organic products industry growth by category, 2024-2026e

	2024	2025e	2026e
Dietary Supplements	5.2%	5.6%	5.8%
Natural, Organic and Functional Food and Beverage	5.7%	5.3%	5.0%
Natural and Organic Personal Care	6.7%	5.6%	5.4%
Total	5.7%	5.4%	5.2%

Source: *Nutrition Business Journal*

CONSUMER SURVEY 1 RESULTS

Where consumers purchase natural and organic food and beverage products



Source: *Nutrition Business Journal* survey targeting consumers that purchase natural or organic food or beverage products and supplements, 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."

DAVID ALLEN

SEE 1 SURVEY

Retail surprise: Millennials love old-school natural retail

The cozy bond between natural products retailers and consumers remains strong—especially among millennials: 44% shop primarily at natural chains like Natural Grocers and Sprouts Farmers Market for food and beverage items. Comparatively, only 20% of Gen Xers and 17% of Gen Zers report loyal attachments to natural chains.

But among consumers in general, shopping for natural and organic products at natural chains comes in fifth place, behind in-store mass-market retailers such as Target and Walmart (64%), online mass retailers (37%), warehouse club stores (34%) and Amazon (29%). That represents a big switch from when Natural Products Expo West got its start, 44 years ago, when nearly all NOP purchases were made at natural products stores (or health food stores, as most were called back then).

One bright spot for natural chains? Sales of NOP goods at these stores (25%) slightly outpace NOP purchases from conventional grocery stores (23%).

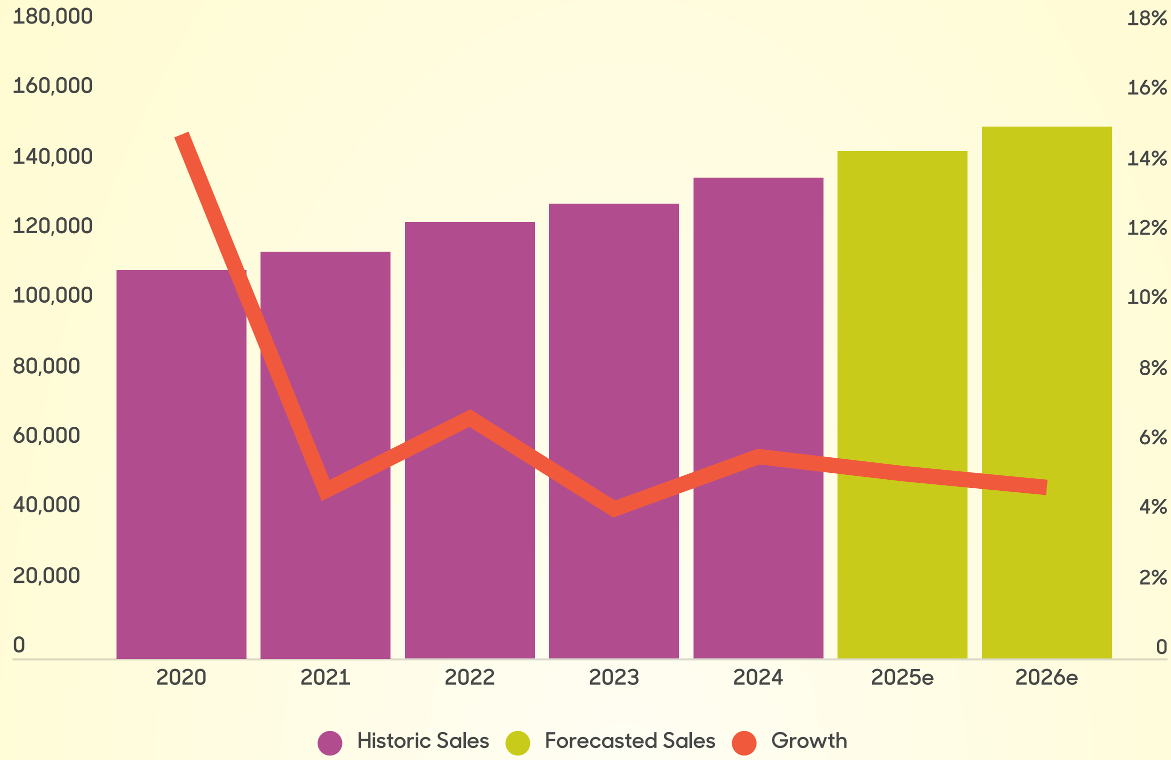
60% of Gen Z consumers shop in mass-market retail—the highest of all generations.

Millennials' devotion to natural chains could speak, among other factors, to the generation's interest in product discovery—aka browsing brick-and-mortar shelves. In addition, as they now range between 29 to 44 years old, millennials are more likely to be in the thick of child-rearing, which could lead to a higher incidence of pushing carts in aisles and hunting for healthier—and, as the data show, higher-quality—products.

Meanwhile, among supplement shoppers (see page 12), 60% of Gen Z consumers shop in mass-market retail—the highest of all generations. At the same time, only 11% of Gen Zers buy supplements on Amazon, significantly fewer than the 19% of millennials and 22% of Gen Xers who do. The data highlight a key generational quality: Gen Z likes convenience—and mass-market retail offers it all in one visit, from eyeliner to gym shorts to 12-packs of electrolyte-packed waters and 120-count bottles of magnesium.

FOOD AND BEVERAGE

Natural and organic food and beverage sales and growth, 2020-2026e



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

FOOD AND BEVERAGE

Natural and organic food and beverage sales, growth and market share by product category 2024-2026e

	Sales			Growth			Market share		
	2024	2025e	2026e	2024	2025e	2026e	2024	2025e	2026e
Dairy	20,505	21,767	22,908	9.8%	6.2%	5.2%	14.9%	15.0%	15.1%
Fruit and Vegetables	28,907	30,190	31,411	4.8%	4.4%	4.0%	21.0%	20.8%	20.7%
Breads and Grains	14,251	14,874	15,477	4.7%	4.3%	4.1%	10.4%	10.3%	10.2%
Meat, Fish, Poultry	9,875	10,685	11,526	13.2%	8.2%	7.7%	7.2%	7.4%	7.6%
Beverages	26,962	28,496	30,085	4.0%	5.7%	5.6%	19.6%	19.7%	19.8%
Snack Foods	11,671	12,362	13,007	5.5%	5.9%	5.2%	8.5%	8.5%	8.6%
Packaged/Prepared Foods	18,496	19,229	19,953	3.7%	4.0%	3.8%	13.4%	13.3%	13.1%
Condiments	6,962	7,346	7,736	5.5%	5.5%	5.3%	5.1%	5.1%	5.1%
Total	137,630	144,949	152,103	5.9%	5.3%	4.9%	100.0%	100.0%	100.0%

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

44% of millennials shop primarily at natural chains for food and beverage items.

What matters (and what doesn't) when buying NOP

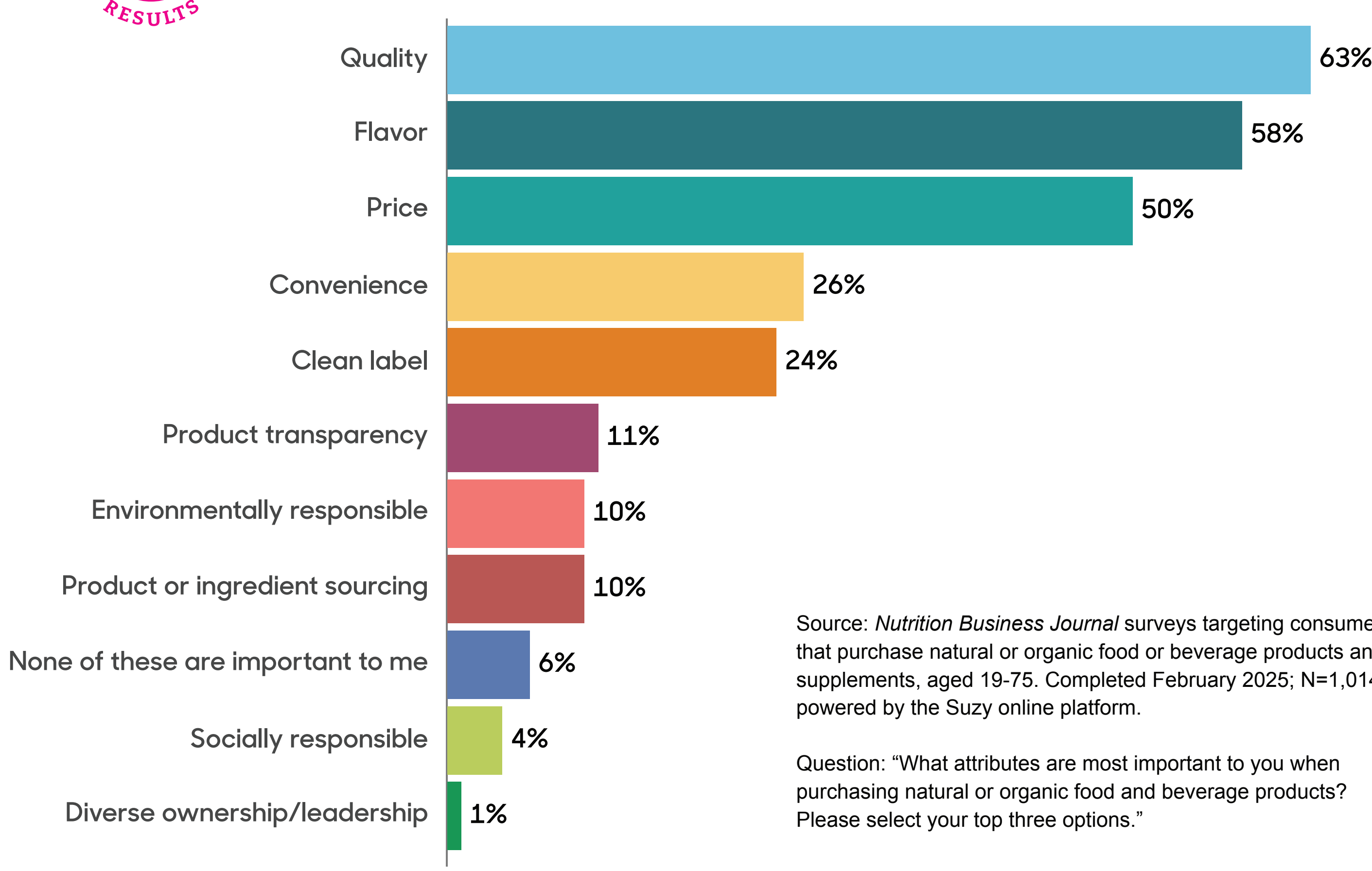
NOP consumers prioritize companies' planet-friendly efforts and ethical practices … right? Those things do matter, but when asked what they care about most when buying NOP, natural shoppers ranked quality (63%), flavor (58%) and price (50%) the highest, syncing crisply with conventional-channel shoppers' responses. Socially responsible was the top choice for only 4% of NOP consumers; environmentally responsible reached 10%.

But the broad numbers don't tell the tale that matters most to savvy brands and marketers. For example, 37% of millennials prioritize clean label, while that concern registers strongly with only 18% of baby boomers. Millennials are also the least price sensitive (only 34% care) and the keenest to buy products because of their quality (76%), compared to 55% of Gen Zers and 62% of Gen Xers. And Gen Z, the generation that grew up with online shopping and the expectation of immediate gratification, ranked convenience the highest (42%) compared to 26% of consumers overall.

Drilling down into data can yield sales gold. The broad-brush numbers serve as helpful guides. But it's the nitty-gritty that can lead to the most consequential decisions surrounding product development, marketing strategy and more.

While much has changed on the ground about marketing, one of its foundations remains stout: Know your audience.

Product attributes important to natural and organic consumers



Source: *Nutrition Business Journal* surveys targeting consumers that purchase natural or organic food or beverage products and supplements, aged 19-75. Completed February 2025; N=1,014; powered by the Suzy online platform.

Question: "What attributes are most important to you when purchasing natural or organic food and beverage products? Please select your top three options."

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PLANTBASE
PLANT-BASED ME'EAT
CHORIZO
TOFU
SALE!
$2.29
SALE!
$1.89
Violife
just like CHEDDAR SLICES
Unreal Deli
ROASTED TURK'Y
CORN'D BEEF
just like COLBY JACK SHREDS
just like CHEDDAR SHREDS
UPTON'S
TRADITIONAL SEITAN
SALE!
$5.79
SALE!
$5.79
SALE!
$4.79
Peaceful REBEL
kite hill RICOTTA
PARMESAN
WILDWOOD
STADIUM Dog

DAVID ALLEN

Dairy

	Sales			Growth		
	2024	2025e	2026e	2024	2025e	2026e
Milk/Cream	4,667	4,833	5,033	7.6%	3.6%	4.1%
Yogurt	6,552	6,999	7,396	10.9%	6.8%	5.7%
Eggs	3,906	4,281	4,572	13.6%	9.6%	6.8%
Cheese	1,239	1,299	1,364	6.1%	4.9%	5.0%
Butter/Sour Cream/Cottage Cheese	1,100	1,181	1,257	13.7%	7.3%	6.4%
Frozen Dairy/Ice cream	2,939	3,065	3,172	6.2%	4.3%	3.5%
Canned milk	102	107	114	2.7%	5.4%	6.0%
Total	20,504	21,765	22,908	9.8%	6.2%	5.2%

Snack Foods

	Sales			Growth		
	2024	2025e	2026e	2024	2025e	2026e
Nutrition Bars/Gels	3,796	3,976	4,133	1.2%	4.7%	3.9%
Chocolate and Candy Bars	1,237	1,343	1,445	8.6%	8.5%	7.6%
Other Candy, Gum, and Sweet Snacks	460	526	590	23.3%	14.2%	12.3%
Salty Snacks	5,576	5,889	6,187	6.6%	5.6%	5.0%
Nuts, Seeds, and Trail Mix	602	628	653	6.1%	4.2%	4.0%
Total	11,671	12,362	13,007	5.5%	5.9%	5.2%

SEE 3 SURVEY

Protein, please—and hold the sugar

Protein obsession used to be the province of the weightlifting crowd, the people downing reps for the sake of ripped abs. But they're not alone anymore. Now, 41% of NOP consumers say protein is their No. 1 priority. Interestingly, millennial and Gen Z consumers rank it especially high: 53% and 45%, respectively. By contrast, pumping up on protein registers as a top interest among only 35% of Gen Xers.

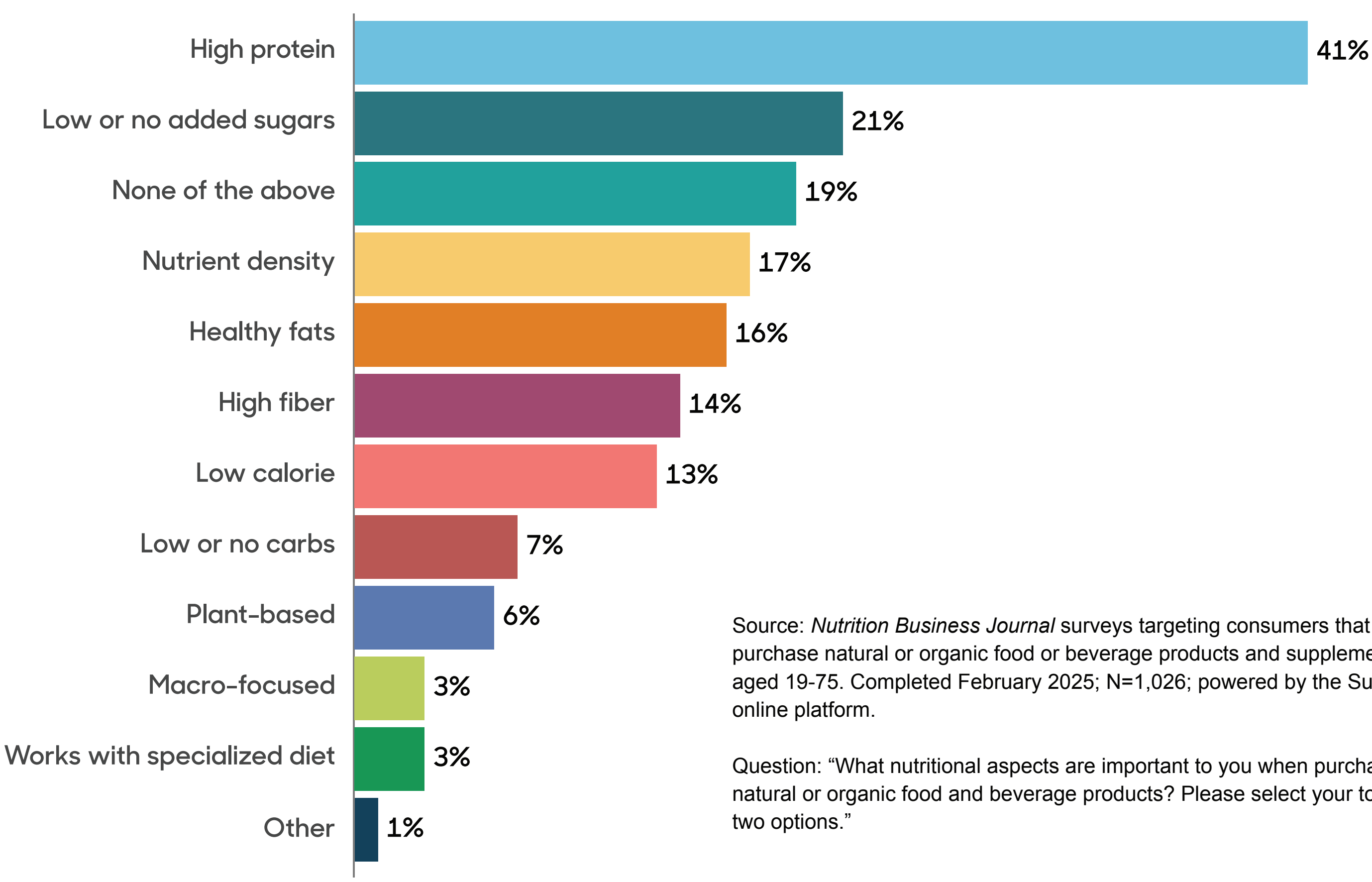
Animal proteins are driving significant momentum in food and beverage. Meat, fish and poultry sales saw exceptional growth of 13.2% in 2024, according to SPINS, and dairy products climbed 9.8%. Meanwhile, items containing more than 15 grams of protein are seeing dramatic sales increases across multiple categories, SPINS reports.

Protein's rise doesn't surprise—the volume of protein-focused products showcased at Expo West in March pointed toward the trend. But our data bolster the contention that protein reigns among industry consumers. To the brands meeting the moment with protein-forward products, well done.

At the same time, cutting back on sugar also matters to the people strolling the aisles and filling online grocery carts. Among natural and organic

CONSUMER SURVEY 3 RESULTS

Nutritional aspects important to consumers



Source: *Nutrition Business Journal* surveys targeting consumers that purchase natural or organic food or beverage products and supplements, 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 select your top two options."

Animal proteins are driving significant momentum in food and beverage. Meat, fish and poultry sales saw exceptional growth of 13.2%, followed by dairy at 9.8%.

FOOD AND BEVERAGE

Packaged/Prepared Foods

	Sales			Growth		
	2024	2025e	2026e	2024	2025e	2026e
Frozen Prepared Foods	3,606	3,649	3,706	-0.2%	1.2%	1.6%
Refrigerated Prepared Food	1,104	1,212	1,314	18.1%	9.8%	8.5%
Food Service/Deli	4,453	4,626	4,796	1.2%	3.9%	3.7%
Shelf Stable Prepared Food	228	235	241	3.7%	3.0%	2.8%
Dried Prepared Food	917	953	992	4.3%	4.0%	4.0%
Nut Butters	1,111	1,140	1,168	-0.7%	2.6%	2.4%
Baby Food & Formula	1,903	2,047	2,171	10.6%	7.6%	6.1%
Meat Alternatives/Veggie Burger	1,258	1,262	1,271	-2.3%	0.3%	0.7%
Tofu/Tempeh	355	374	394	7.2%	5.2%	5.3%
Shelf Stable Soup & Broth	1,730	1,805	1,878	6.7%	4.3%	4.1%
Pasta Sauces	1,169	1,246	1,324	11.7%	6.6%	6.2%
Desserts	663	680	698	-0.4%	2.7%	2.6%
Total	18,496	19,229	19,953	3.7%	4.0%	3.8%

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

FOOD AND BEVERAGE

Beverages

	Sales			Growth		
	2024	2025e	2026e	2024	2025e	2026e
Refrigerated/Fresh Juices/Drinks and Kombucha	3,588	3,709	3,838	1.4%	3.4%	3.5%
Frozen Juice	47	46	46	4.7%	-1.0%	-0.5%
Shelf Stable Juices & Drinks (including Coconut/Plant Waters)	2,201	2,307	2,416	8.8%	4.8%	4.7%
Beer, Wine, Liquor, and Cocktails	2,870	2,991	3,119	3.1%	4.2%	4.3%
Soymilk	478	471	467	0.8%	-1.3%	-0.9%
Non-soy Dairy Alternatives (Rice, Almond Milk)	3,806	4,032	4,257	-3.6%	6.0%	5.6%
Tea	1,975	2,086	2,198	7.3%	5.6%	5.4%
Coffee	2,960	3,086	3,243	1.1%	4.3%	5.1%
Coffee Substitutes/Cocoa	181	184	187	3.8%	1.8%	1.7%
Soft Drinks, Enhanced Drinks, Sparkling and Flavored Waters	8,858	9,585	10,314	8.5%	8.2%	7.6%
Total	26,964	28,498	30,085	4.0%	5.7%	5.6%

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

consumers, 21% rated low or no added sugars as a top nutritional priority. Only protein ranked higher.

One welcome surprise: Passion for nutrient density now claims the No. 3 spot, with 17% of consumers deeming it most important. This is interesting because not long ago, few industry stakeholders used the term *nutrient density*. Today, it's got its own advocacy organization, the Nutrient Density Alliance, and people from all corners of the industry reference its importance. In fact, the regenerative agriculture movement is beginning to invest in nutrient density research. The hope? That crops grown using regenerative agricultural methods contain higher nutrient density than conventional crops.

The trio of protein, low sugar and nutrient density aligns with trends flourishing on social media, where influencers trumpet clean labels, simple ingredients and rejecting foods lacking good-for-you profiles. These three also reflect GLP-1-related trends, where reduced food consumption feeds a desire to ensure that every bite counts.

SEE 4 SURVEY

Certifications: Organic wins

Organic received the USDA seal of approval in 2000, and in the intervening 25 years, it has become the most important certification to NOP consumers across categories. Fifty-three percent of NOP food and beverage consumers and 48% of supplement buyers say it's No. 1.

Holding down second place in the rankings: Made in the USA (35% for food and beverage, 43% for supplements)—well above third-place Non-GMO (19% for food and beverage, 19% for supplements), Fair Trade, Vegan and others. Certified B Corporation ranked last, noted by just 3% of food and beverage and supplement consumers.

Made in the USA doesn't get much buzz in the NOP industry—stakeholders trumpet regenerative agriculture, diverse ownership and other bona fides with much more oomph. But this attribute clearly matters to consumers.

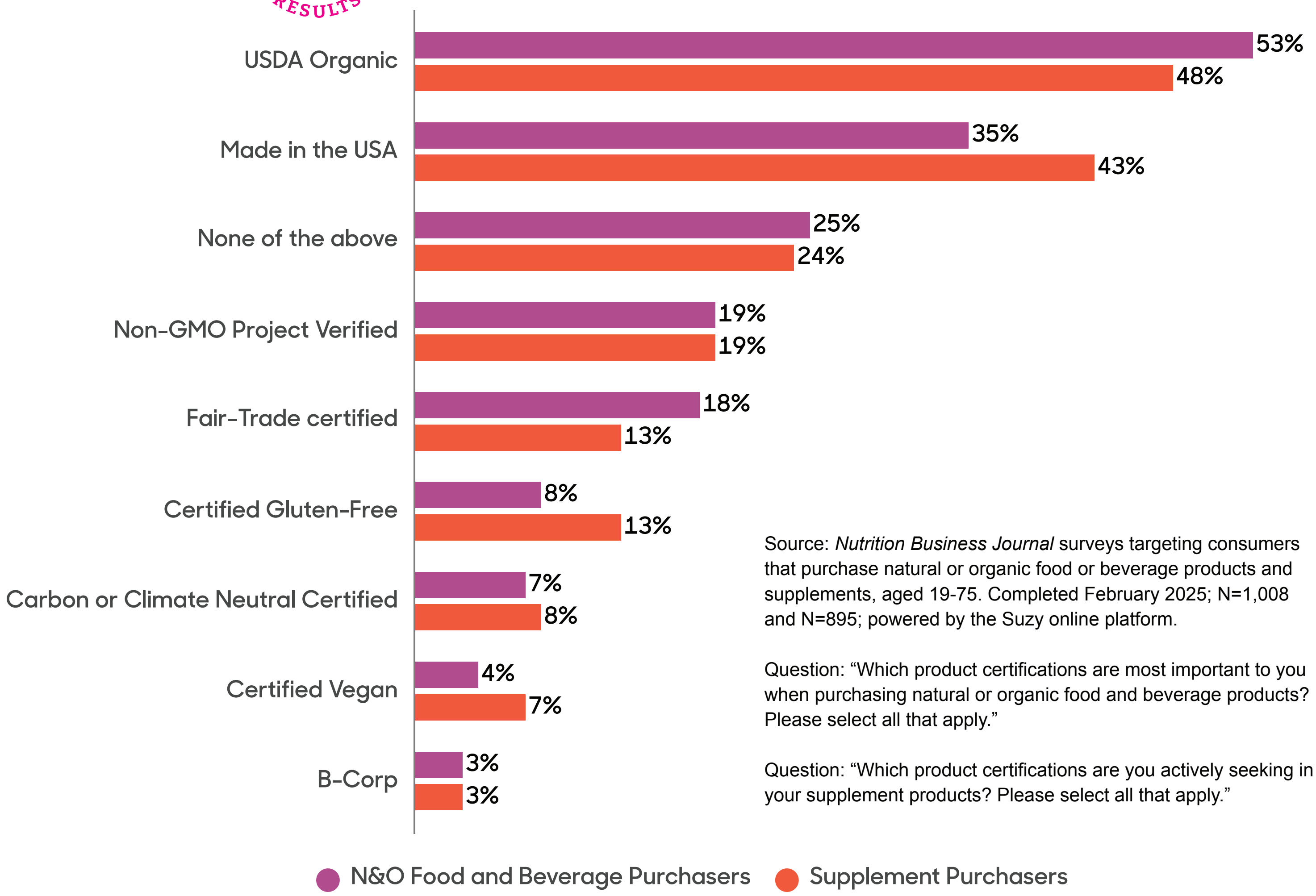
Organic stakeholders have dedicated decades to advocating on behalf of its environmental and health advantages. When it got started, organic was awfully niche. Now, big-box retailers such as Walmart and warehouse clubs like Costco sell more organic products than any other retailers.

Hats off to the many people who have helped shepherd the organic movement into the mainstream. And in a perhaps fortuitous twist, many organic brands are, in fact, made in the USA.

Article continued on page 22

CONSUMER SURVEY 4 RESULTS

Certifications important to consumers



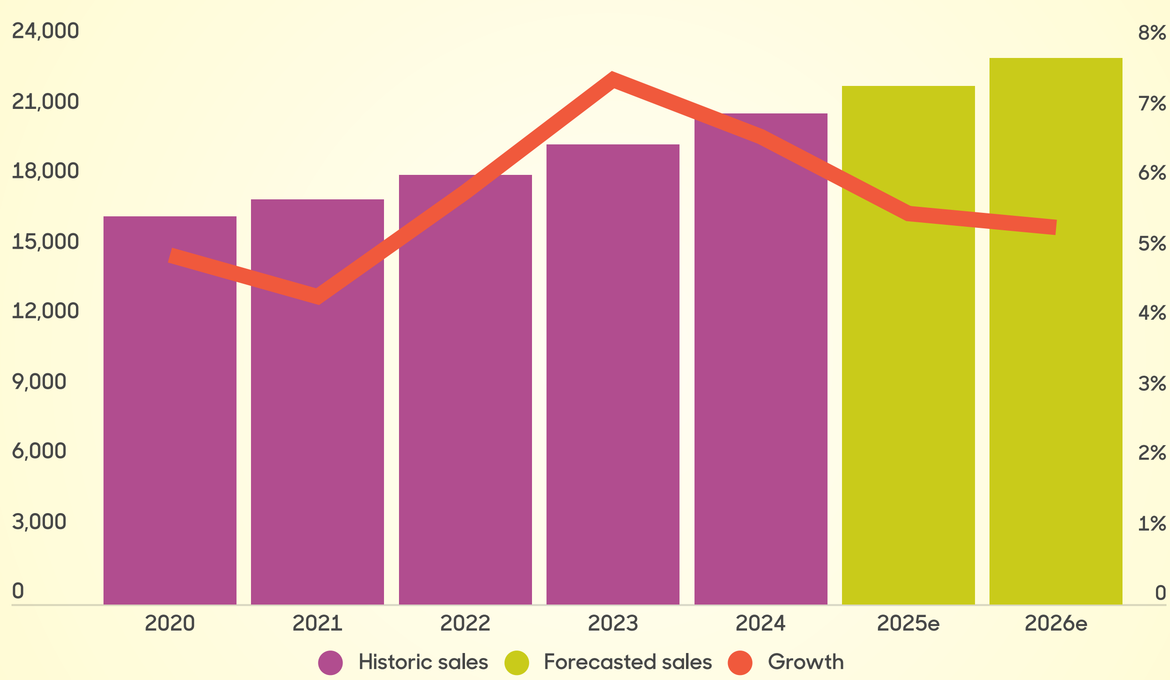
Source: *Nutrition Business Journal* surveys targeting consumers that purchase natural or organic food or beverage products and supplements, aged 19-75. Completed February 2025; N=1,008 and N=895; powered by the Suzy online platform.

Question: "Which product certifications are most important to you when purchasing natural or organic food and beverage products? Please select all that apply."

Question: "Which product certifications are you actively seeking in your supplement products? Please select all that apply."

PERSONAL CARE

Natural and organic personal care sales and growth, 2020-2026e



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

DAVID ALLEN (2)

PERSONAL CARE

Natural and organic personal care sales, growth and market share 2024-2026e

	Sales			Growth			Share of NOP		
	2024	2025e	2026e	2024	2025e	2026e	2024	2025e	2026e
Natural and Organic Personal Care	21,079	22,265	23,464	6.7%	5.6%	5.4%	6.5%	6.5%	6.5%

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

PERSONAL CARE

Natural and organic personal care sales, growth and market share by product category 2024-2026e

	Sales			Growth			Market share		
	2024	2025e	2026e	2024	2025e	2026e	2024	2025e	2026e
Cosmetics	841	864	886	4.1%	2.7%	2.5%	4.0%	3.9%	3.8%
Feminine hygiene	697	767	836	11.0%	10.1%	8.9%	3.3%	3.4%	3.6%
Hair products	5,562	5,898	6,285	5.3%	6.0%	6.6%	26.4%	26.5%	26.8%
Baby care	391	413	435	5.6%	5.5%	5.3%	1.9%	1.9%	1.9%
Nail care	26	27	27	-0.5%	1.4%	1.4%	0.1%	0.1%	0.1%
Oral hygiene	984	1,070	1,156	12.2%	8.7%	8.1%	4.7%	4.8%	4.9%
Bath items	451	479	508	7.4%	6.2%	6.0%	2.1%	2.2%	2.2%
Deodorants	941	1,047	1,154	23.1%	11.3%	10.3%	4.5%	4.7%	4.9%
Shaving	388	416	444	10.8%	7.2%	6.7%	1.8%	1.9%	1.9%
Skin care	7,110	7,450	7,756	6.2%	4.8%	4.1%	33.7%	33.5%	33.1%
Bath/Toilet soap	3,007	3,141	3,269	5.6%	4.5%	4.1%	14.3%	14.1%	13.9%
Aroma/Fragrances	681	693	709	-2.9%	1.8%	2.3%	3.2%	3.1%	3.0%
Total	21,079	22,265	23,464	6.7%	5.6%	5.4%	100.0%	100.0%	100.0%

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

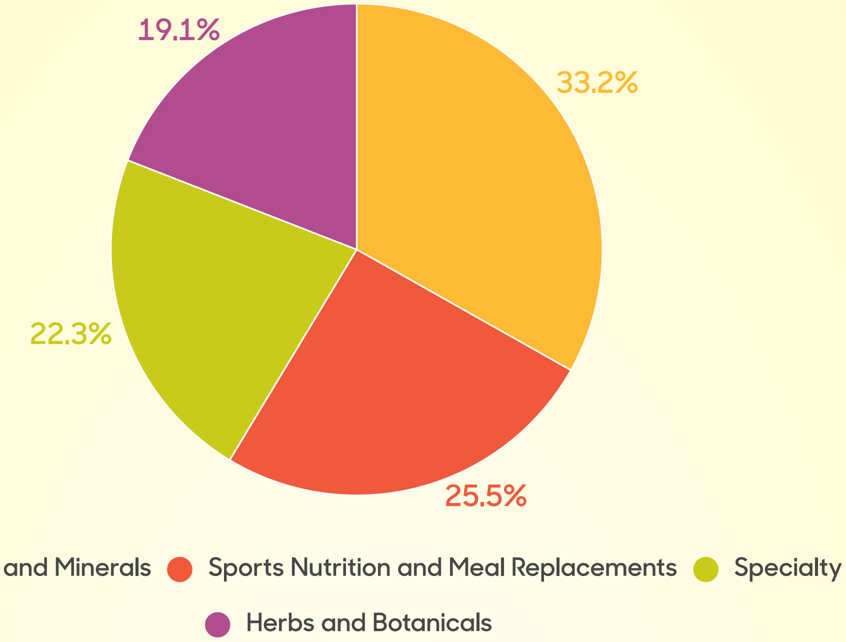
PERSONAL CARE

Natural and organic personal care sales, growth and market share by channel, 2024-2026e

	Sales			Growth			Market share		
	2024	2025e	2026e	2024	2025e	2026e	2024	2025e	2026e
Natural and Specialty Retail	4,208	4,345	4,474	4.2%	3.3%	3.0%	20.0%	19.5%	19.1%
Department Store/Boutique/Salon/Spa	1,820	1,873	1,923	3.2%	2.9%	2.6%	8.6%	8.4%	8.2%
Specialty Personal Care Stores	1,471	1,563	1,667	7.9%	6.3%	6.6%	7.0%	7.0%	7.1%
MLM/Network Marketing	2,397	2,387	2,387	-1.7%	-0.4%	0.0%	11.4%	10.7%	10.2%
Other Direct	5,151	5,567	5,977	10.0%	8.1%	7.4%	24.4%	25.0%	25.5%
Mass Market/Beauty Supply Discounters	6,033	6,529	7,037	10.1%	8.2%	7.8%	28.6%	29.3%	30.0%
Total	21,079	22,265	23,464	6.7%	5.6%	5.4%	100.0%	100.0%	100.0%

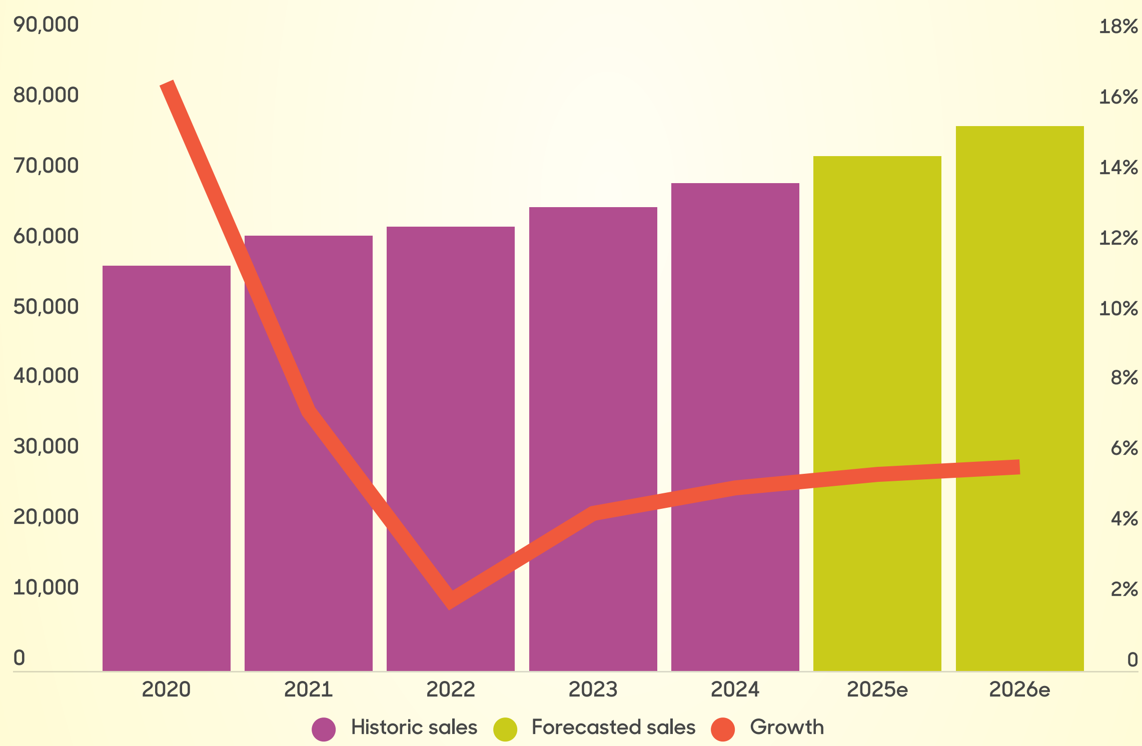
Source: *Nutrition Business Journal* ($mil, consumer sales)

SUPPLEMENTS Supplement industry sales by category, 2024



Source: *Nutrition Business Journal*

SUPPLEMENTS Supplement industry sales and growth, 2020-2026e



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

SUPPLEMENTS

Supplement sales, growth and market share by product category 2024-2026e

	Sales			Growth			Market share		
	2024	2025e	2026e	2024	2025e	2026e	2024	2025e	2026e
Herbs and Botanicals	13,231	14,034	14,940	5.4%	6.1%	6.5%	19.1%	19.2%	19.3%
Sports Nutrition and Meal Replacements	17,643	18,895	20,220	7.2%	7.1%	7.0%	25.5%	25.8%	26.1%
Vitamins and Minerals	22,984	23,744	24,627	2.8%	3.3%	3.7%	33.2%	32.5%	31.8%
Specialty	15,423	16,455	17,588	6.3%	6.7%	6.9%	22.3%	22.5%	22.7%
Total	69,281	73,128	77,376	5.2%	5.6%	5.8%	100.0%	100.0%	100.0%

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

DAVID ALLEN (2)

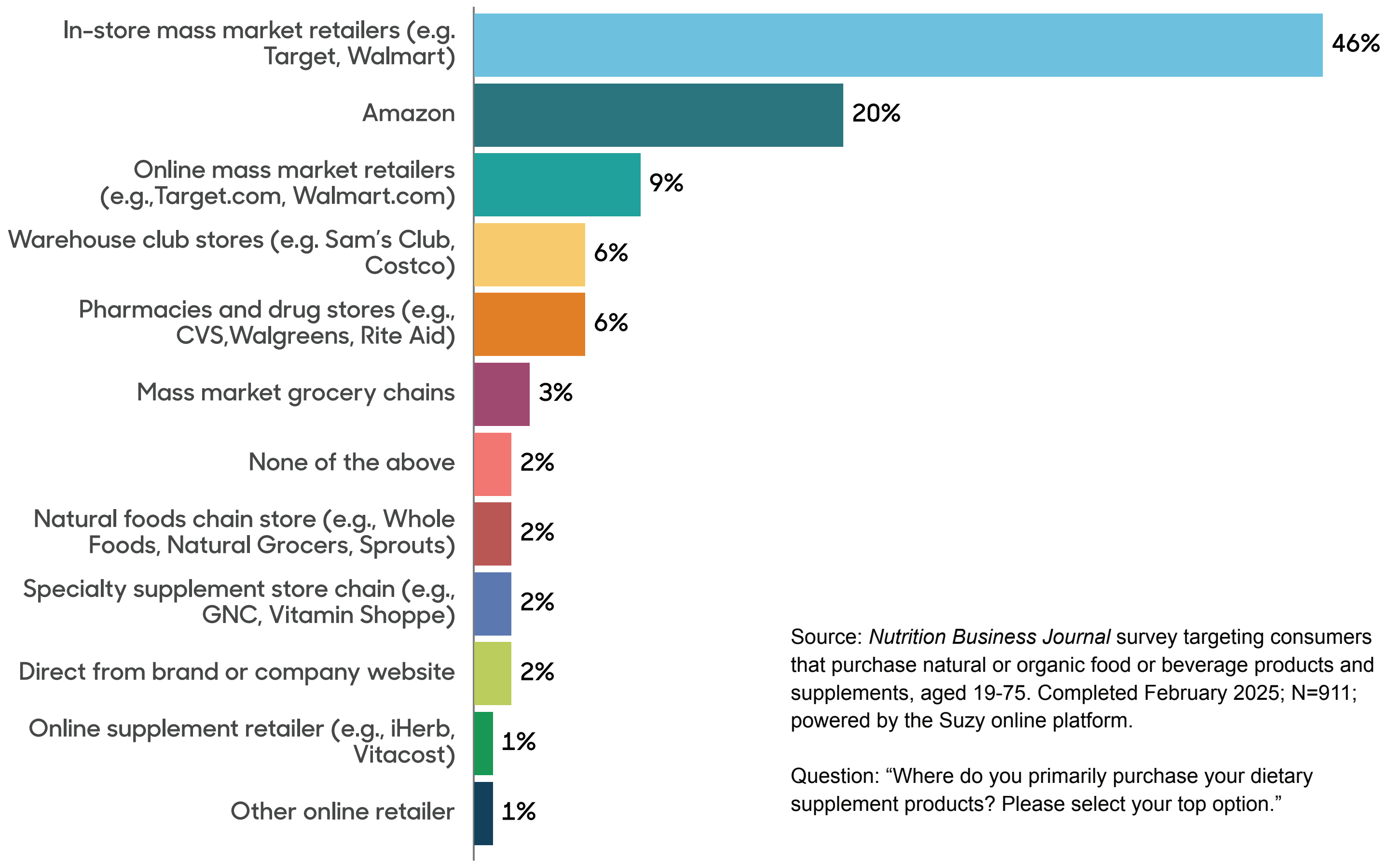
Supplement sales, growth and market share by delivery formats 2024-2026e

	Sales			Growth			Market share		
	2024	2025e	2026e	2024	2025e	2026e	2024	2025e	2026e
Chewable	1,488	1,609	1,748	7.1%	8.2%	8.6%	2.1%	2.2%	2.3%
Effervescent	2,960	3,054	3,156	3.3%	3.2%	3.3%	4.3%	4.2%	4.1%
Gummy	17,057	18,012	18,984	5.9%	5.6%	5.4%	24.6%	24.6%	24.5%
Liquid	8,530	9,312	10,192	8.9%	9.2%	9.5%	12.3%	12.7%	13.2%
Lozenge	186.4	167.6	149.8	-9.6%	-10.1%	-10.6%	0.3%	0.2%	0.2%
Tablet	5,118	5,089	5,103	-1.1%	-0.6%	0.3%	7.4%	7.0%	6.6%
Capsule	7,535	7,502	7,528	-0.9%	-0.4%	0.4%	10.9%	10.3%	9.7%
Pill pack	572.3	567.1	564.1	-1.0%	-0.9%	-0.5%	0.8%	0.8%	0.7%
Powder	12,129	13,689	15,367	12.5%	12.9%	12.3%	17.5%	18.7%	19.9%
Quick dissolve	2,493	2,651	2,809	6.6%	6.3%	6.0%	3.6%	3.6%	3.6%
Shot	321.1	327.3	334.0	1.8%	1.9%	2.1%	0.5%	0.4%	0.4%
Softgel	9,003	9,139	9,292	1.3%	1.5%	1.7%	13.0%	12.5%	12.0%
Vegetarian capsule	1,746	1,858	1,983	6.0%	6.4%	6.7%	2.5%	2.5%	2.6%
All other	142.4	153.0	165.5	6.6%	7.5%	8.1%	0.2%	0.2%	0.2%
Total	69,281	73,128	77,376	5.2%	5.6%	5.8%	100.0%	100.0%	100.0%

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

CONSUMER SURVEY 5 RESULTS

Where consumers primarily purchase supplements



Source: *Nutrition Business Journal* survey targeting consumers that purchase natural or organic food or beverage products and supplements, aged 19-75. Completed February 2025; N=911; powered by the Suzy online platform.

Question: "Where do you primarily purchase your dietary supplement products? Please select your top option."

SEE 6 SURVEY

How they learn: Discovery by algorithm

Friends and family. The internet. Social media and influencers. These capture the top three ways in which most NOP consumers get information about products.

But dependence upon technology rises with younger generations: Whereas 32% of natural and organic food and beverage consumers overall rely on social media, the number reaches 38% for Gen Z. That generation also depends much more on podcasts (30%) than NOP consumers overall (18%).

The Gen Z factor is more pronounced in the realm of AI—the generation's reliance on the burgeoning tech far surpasses that of older generational cohorts. For Gen Z consumers, 65% use AI to help make food and beverage purchasing decisions, and 68% use AI when shopping for supplements. But among millennial consumers, AI use hits 35% when shopping for foods and beverages and 41% when perusing the supplement aisles. And for Gen Xers, 37% use AI for food and beverage and 35% use it for supplement shopping.

The implications of these datapoints are consequential. As younger generations embrace AI—and ditch internet searches—brands need to find ways to get in front of them. Tech in general should dwell at the heart of most NOP promotional pushes. If brands aren't on TikTok, in a podcast or recommended by an AI tool, they may be invisible to a vital reservoir of future buyers.

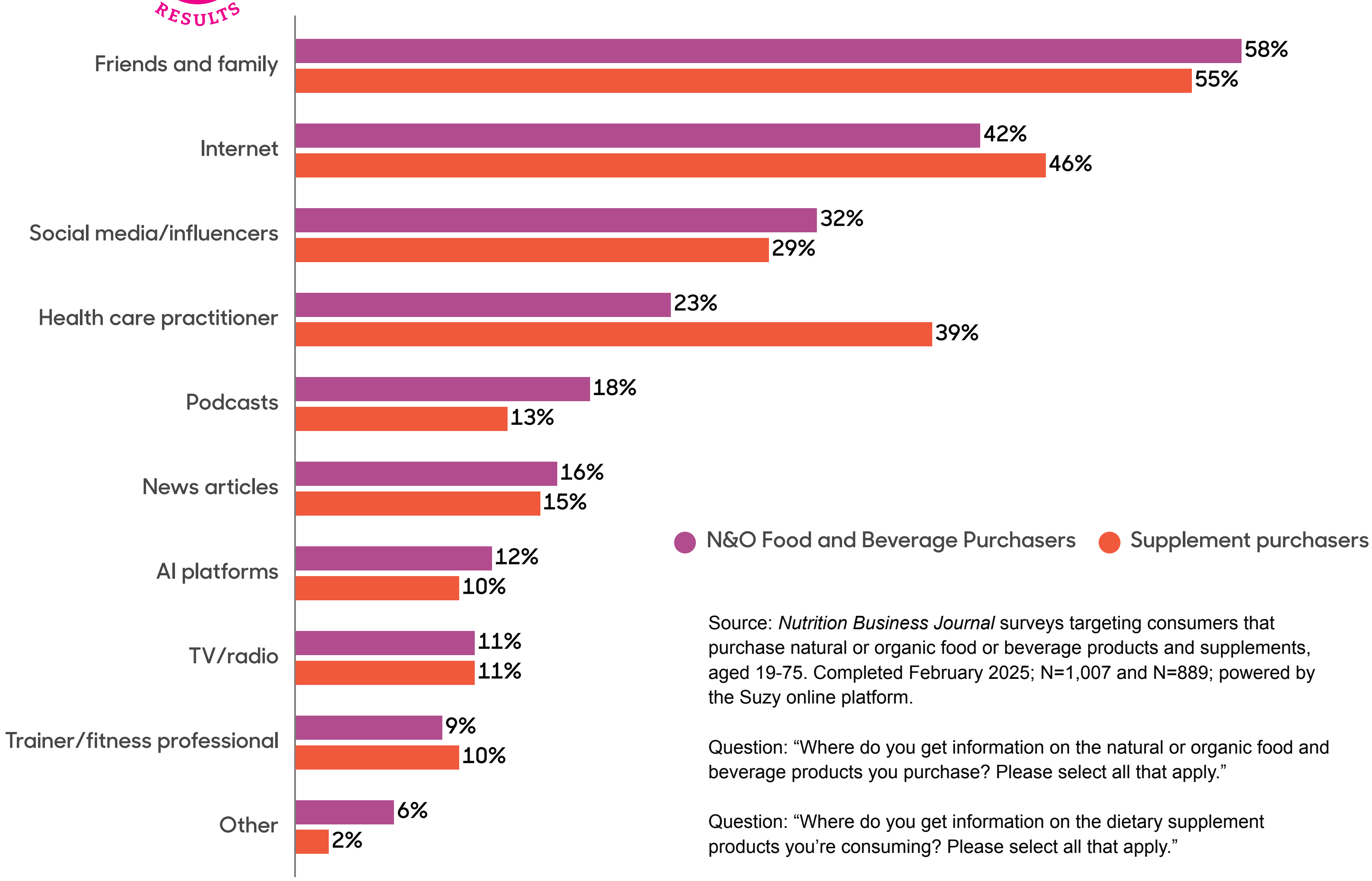
A new kind of natural

In summary, today's NOP consumer shops everywhere: independent natural retailers, natural chains, warehouses, online, through their phones. They seek out protein and shrink from sugar. Gen Z makes decisions based on what AI tells them, and this generation loves convenience. Millennials snag plant-based milk from natural chains, don't pay a ton of attention to price and care deeply about quality. Organic matters to everybody.

Sales channels have expanded and evolved quite a bit during the past 40 years. But the natural products retailers that fostered today's fizzy NOP ferment—the stores fixed entirely on the channel's bounty—remain vigorous participants in the advancement of this fast-changing industry. And for all NOP stakeholders today, disruption rules. Given the rapid rise of AI, chances are the upheaval grows even more tempestuous during the next year.

CONSUMER SURVEY 6 RESULTS

Where consumers get information on products



Source: *Nutrition Business Journal* surveys targeting consumers that purchase natural or organic food or beverage products and supplements, aged 19-75. Completed February 2025; N=1,007 and N=889; powered by the Suzy online platform.

Question: "Where do you get information on the natural or organic food and beverage products you purchase? Please select all that apply."

Question: "Where do you get information on the dietary supplement products you're consuming? Please select all that apply."

ILLUSTRATION BY PETER AND MARIA HOEY / COINOP