

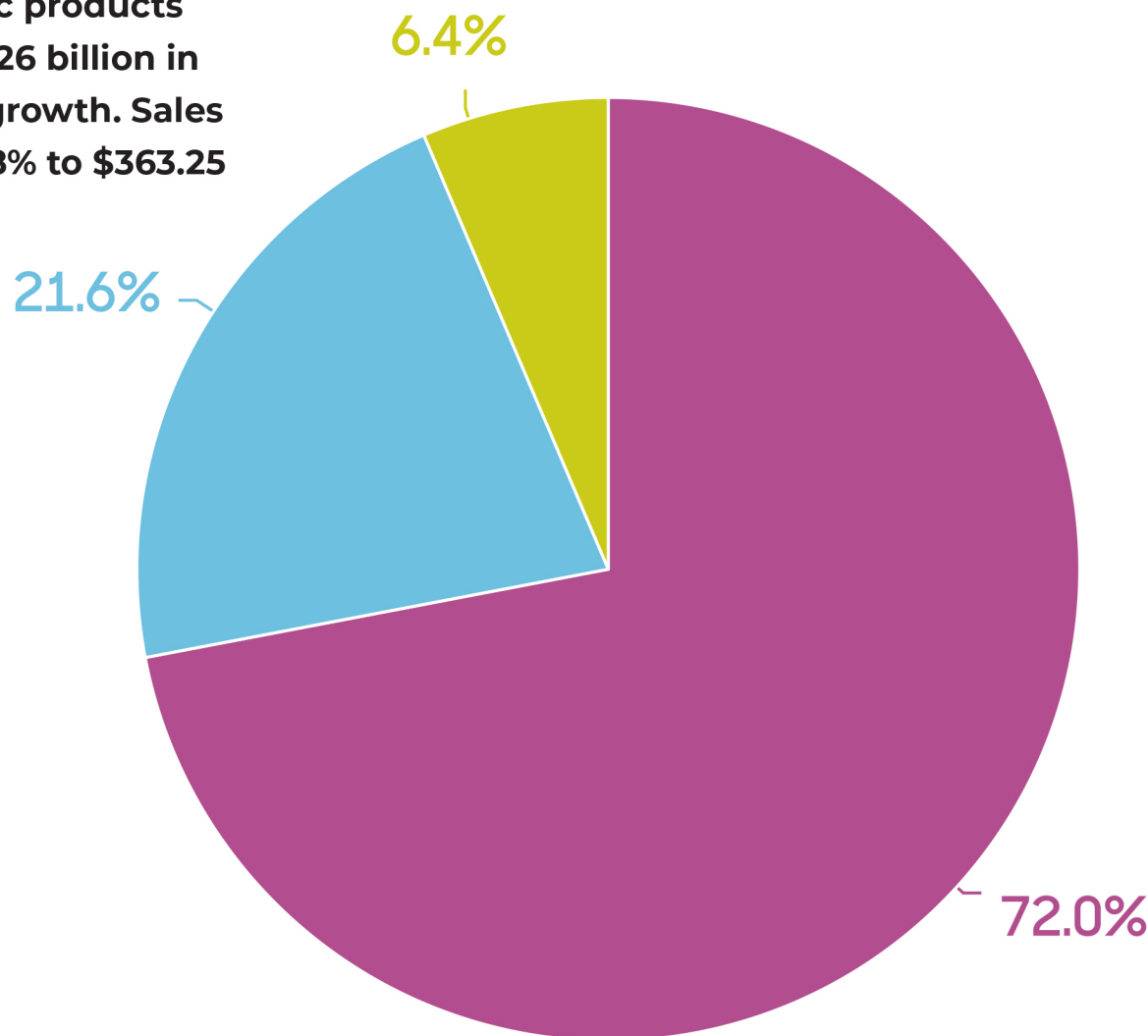
The big picture

The natural and organic products industry reached \$343.26 billion in value in 2025, on 5.6% growth. Sales are predicted to rise 5.8% to \$363.25 billion in 2026.

2025 sales by category

- Natural, organic and functional foods and beverages
- Dietary supplements
- Natural and organic personal care

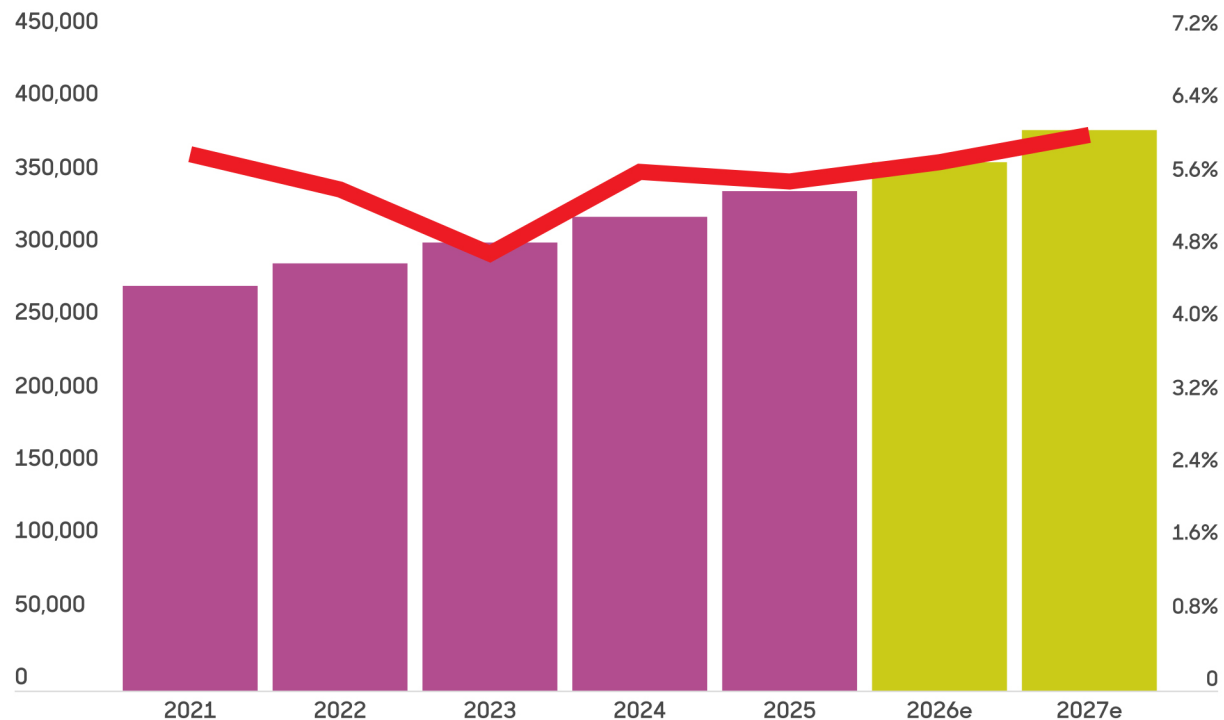
Source: Nutrition Business Journal



Natural and organic products industry sales and growth, 2021-2027e

- Historic sales
- Forecasted sales
- Growth

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



THE BIG PICTURE

Natural and organic products industry sales by category, 2025-2027e

	2025	2026e	2027e
Dietary supplements	74,149	79,271	85,159
Natural, Organic and Functional Food and Beverage	247,147	260,904	275,833
Natural and Organic Personal Care	21,965	23,077	24,425
Total	343,261	363,252	385,418

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

THE BIG PICTURE

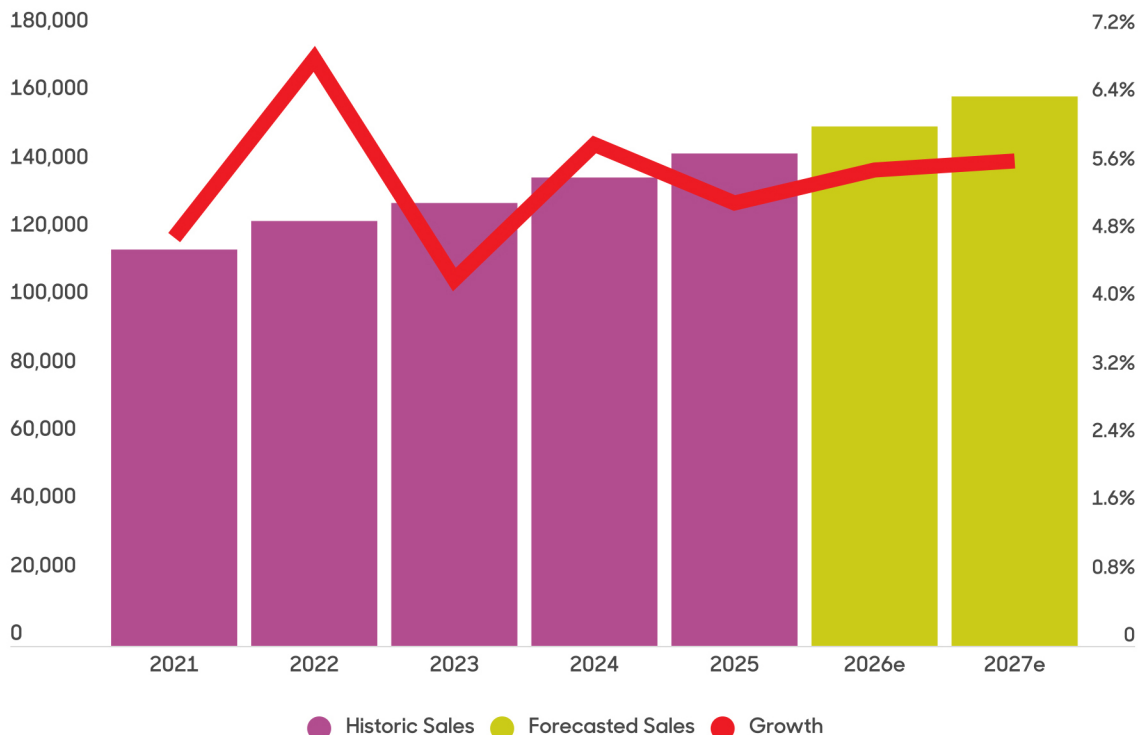
Natural and organic products industry growth by category, 2025-2027e

	2025	2026e	2027e
Dietary Supplements	7.1%	6.9%	7.4%
Natural, Organic and Functional Food and Beverage	5.2%	5.6%	5.7%
Natural and Organic Personal Care	4.2%	5.1%	5.8%
Total	5.6%	5.8%	6.1%

Source: *Nutrition Business Journal*

FOOD AND BEVERAGE

Natural and organic food and beverage sales and growth, 2021-2027e



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

FOOD AND BEVERAGE

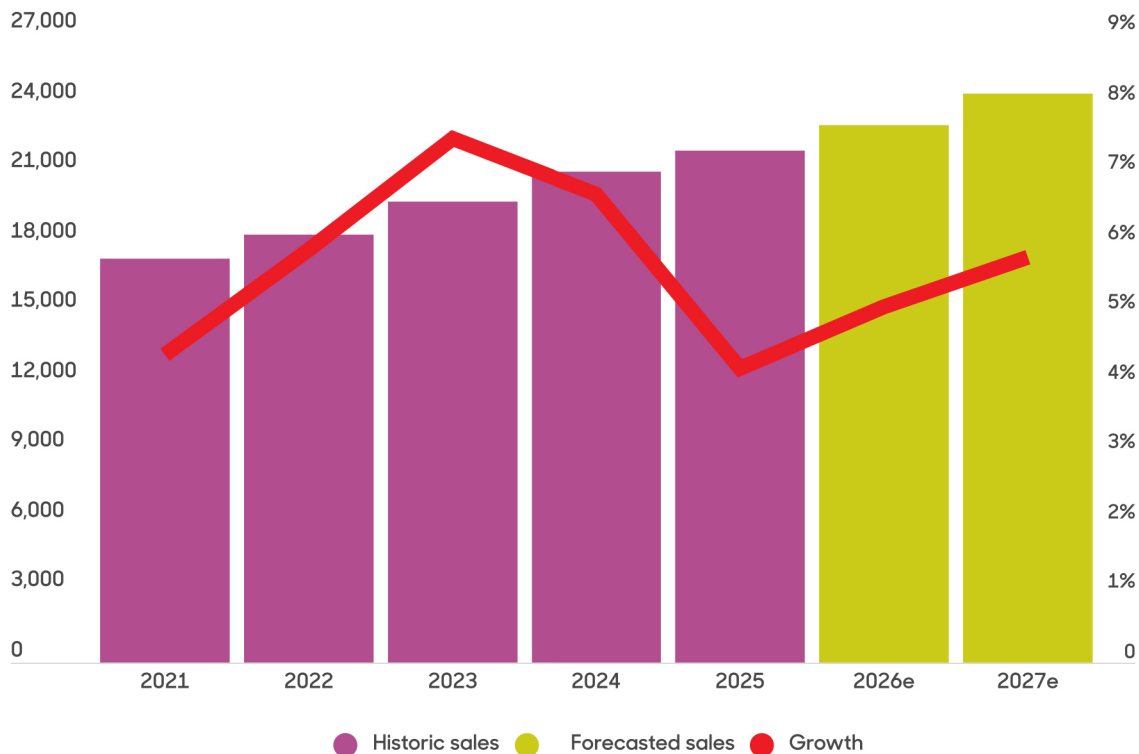
Natural and organic food and beverage sales, growth and market share by product category 2025-2027e

	Sales			Growth			Market share		
	2025	2026e	2027e	2025	2026e	2027e	2025	2026e	2027e
Dairy	22,491	24,401	26,175	9.7%	8.5%	7.3%	15.5%	16.0%	16.2%
Fruit and Vegetables	30,341	31,950	33,660	5.0%	5.3%	5.3%	21.0%	20.9%	20.8%
Breads and Grains	14,634	15,099	15,633	2.7%	3.2%	3.5%	10.1%	9.9%	9.7%
Meat, Fish, Poultry	10,905	12,089	13,433	10.3%	10.9%	11.1%	7.5%	7.9%	8.3%
Beverages	27,993	29,296	30,868	3.8%	4.7%	5.4%	19.3%	19.2%	19.1%
Snack Foods	12,149	12,708	13,315	4.1%	4.6%	4.8%	8.4%	8.3%	8.2%
Packaged/Prepared Foods	18,949	19,568	20,299	2.4%	3.3%	3.7%	13.1%	12.8%	12.6%
Condiments	7,271	7,669	8,097	4.4%	5.5%	5.6%	5.0%	5.0%	5.0%
Total	144,731	152,779	161,480	5.2%	5.6%	5.7%	100.0%	100.0%	100.0%

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

PERSONAL CARE

Natural and organic personal care sales and growth, 2021-2027e



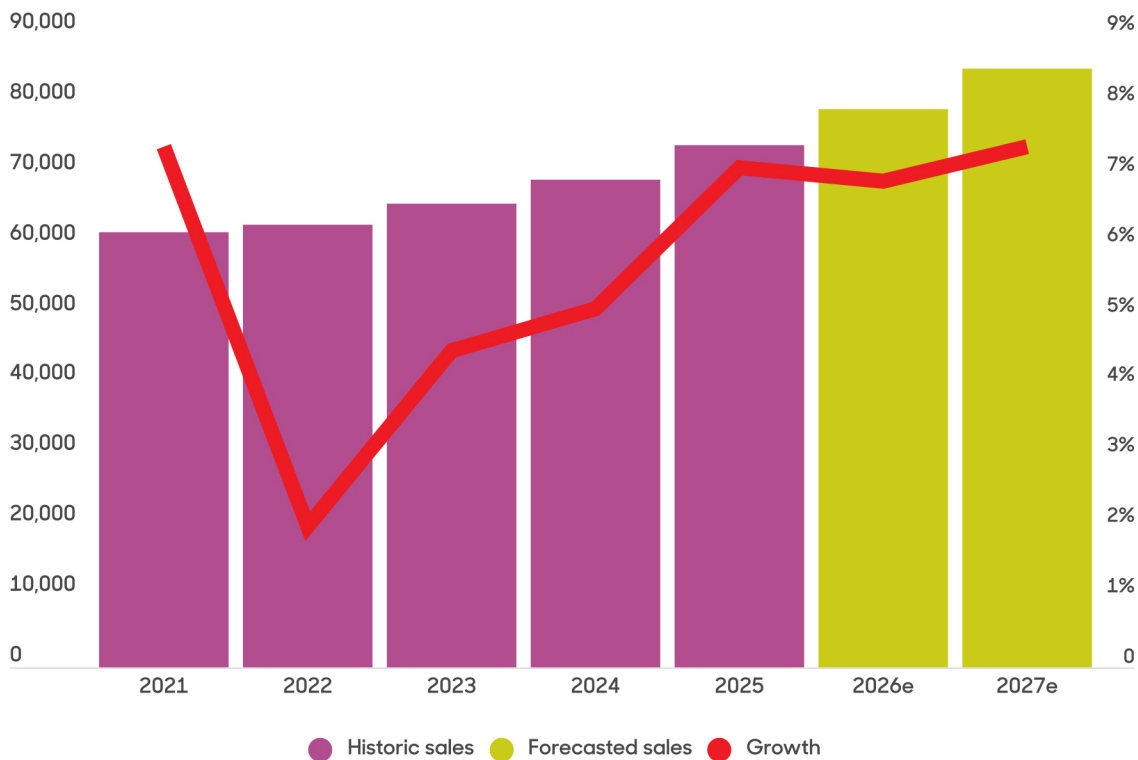
Source: Nutrition Business Journal (\$mil, consumer sales)

Natural and organic personal care sales, growth and market share by product category 2025-2027e

	Sales			Growth			Market share		
	2025	2026e	2027e	2025	2026e	2027e	2025	2026e	2027e
Cosmetics	835.9	852.8	876.8	-0.7%	2.0%	2.8%	3.8%	3.7%	3.6%
Feminine hygiene	763.9	839.2	922.7	9.6%	9.9%	10.0%	3.5%	3.6%	3.8%
Hair products	5,832	6,165	6,568	4.9%	5.7%	6.6%	26.6%	26.7%	26.9%
Baby care	408.3	429.2	452.0	4.4%	5.1%	5.3%	1.9%	1.9%	1.9%
Nail care	26.2	26.4	27.0	-0.9%	1.1%	2.0%	0.1%	0.1%	0.1%
Oral hygiene	1,021	1,070	1,124	3.8%	4.8%	5.0%	4.6%	4.6%	4.6%
Bath items	477.0	505.4	536.9	5.8%	5.9%	6.2%	2.2%	2.2%	2.2%
Deodorants	996.1	1,057	1,124	5.9%	6.2%	6.4%	4.5%	4.6%	4.6%
Shaving	394.4	404.3	418.0	1.6%	2.5%	3.4%	1.8%	1.8%	1.7%
Skincare	7,408	7,786	8,253	4.2%	5.1%	6.0%	33.7%	33.7%	33.8%
Bath/Toilet soap	3,067	3,145	3,251	2.0%	2.6%	3.4%	14.0%	13.6%	13.3%
Aroma/Fragrances	734.8	796.9	871.0	7.9%	8.5%	9.3%	3.3%	3.5%	3.6%
Total	21,965	23,077	24,425	4.2%	5.1%	5.8%	100.0%	100.0%	100.0%

SUPPLEMENTS

Supplement industry sales and growth, 2021-2027e



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

SUPPLEMENTS

Supplement sales, growth and market share by product category 2025-2027e

	Sales			Growth			Market share		
	2025	2026e	2027e	2025	2026e	2027e	2025	2026e	2027e
Herbs and Botanicals	14,089	15,052	16,138	7.0%	6.8%	7.2%	19.0%	19.0%	19.0%
Sports Nutrition and Meal Replacements	18,937	20,415	22,036	7.6%	7.8%	7.9%	25.5%	25.8%	25.9%
Vitamins and Minerals	24,091	25,232	26,625	4.8%	4.7%	5.5%	32.5%	31.8%	31.3%
Specialty	17,032	18,571	20,360	10.0%	9.0%	9.6%	23.0%	23.4%	23.9%
Total	74,149	79,271	85,159	7.1%	6.9%	7.4%	100.0%	100.0%	100.0%

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