



Winning with Social Commerce

A Deep Dive Into Supplements and Social

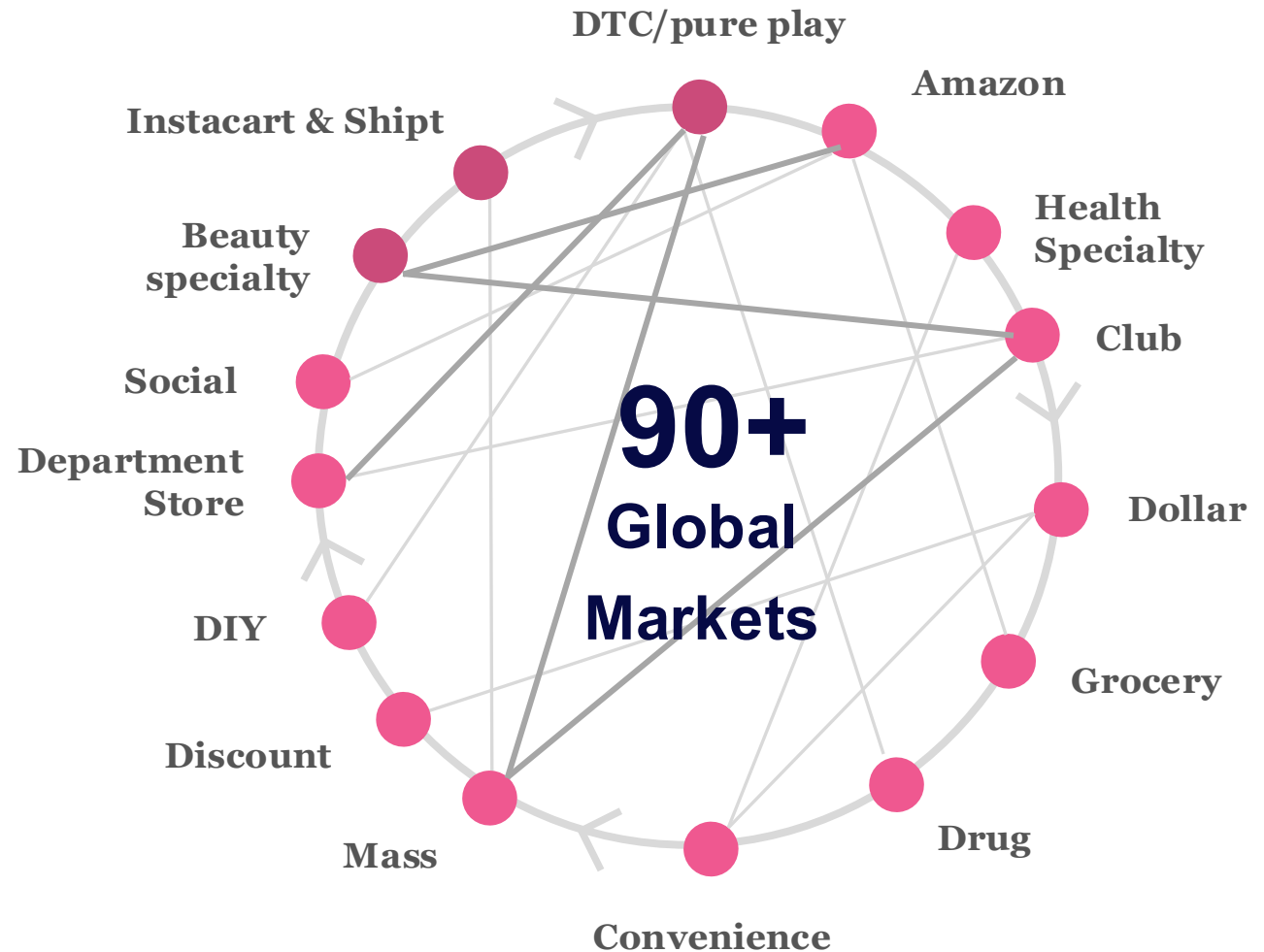
Jack O'Leary – Director, eCommerce Thought Leadership, NielsenIQ

March 2026



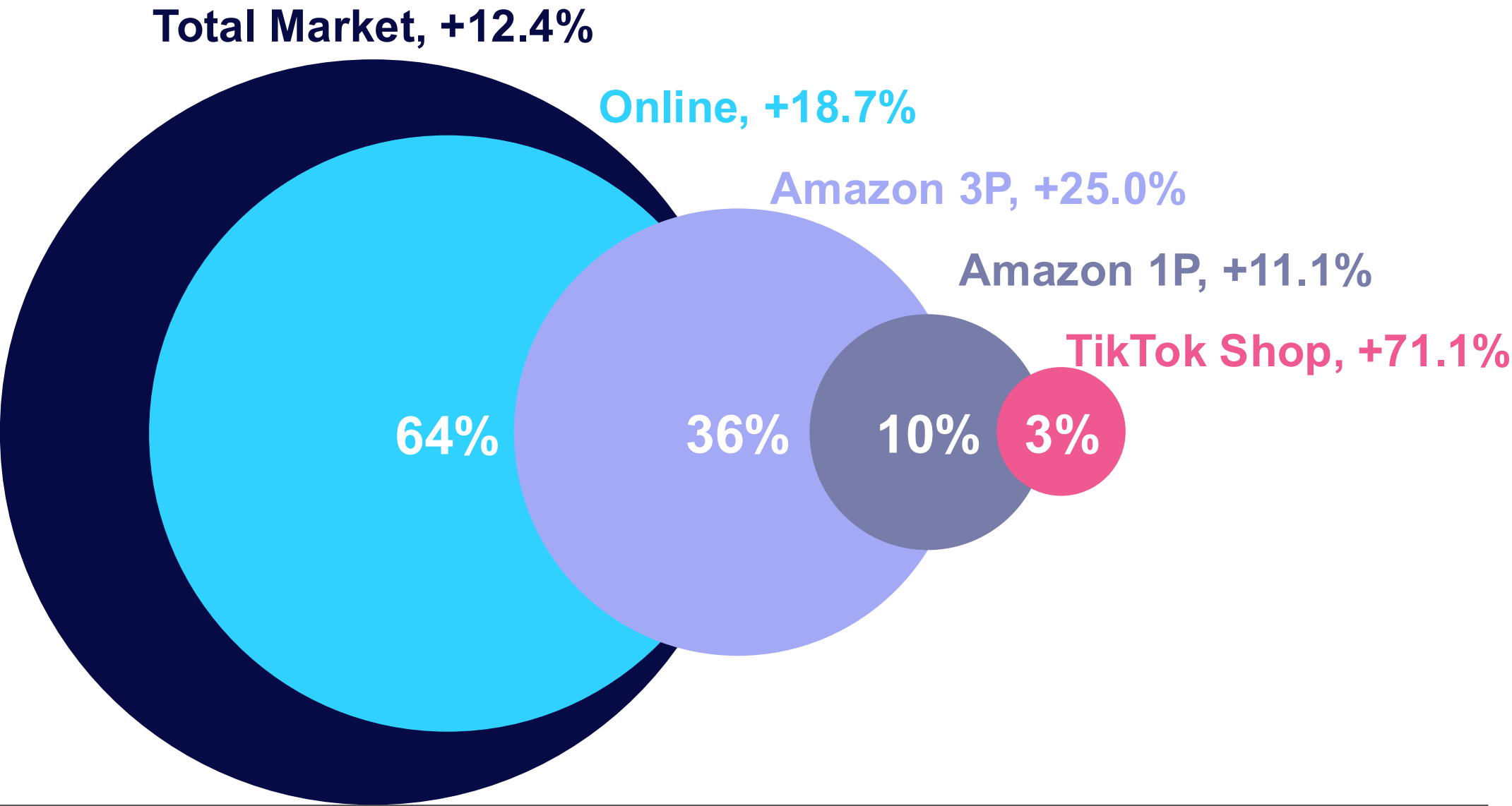
NIQ delivers the *Full View* of buying behavior

- The industry's most trusted consumer data—more channels, sources, consumers, and regions
- Validated with point of sales data directly from retailers



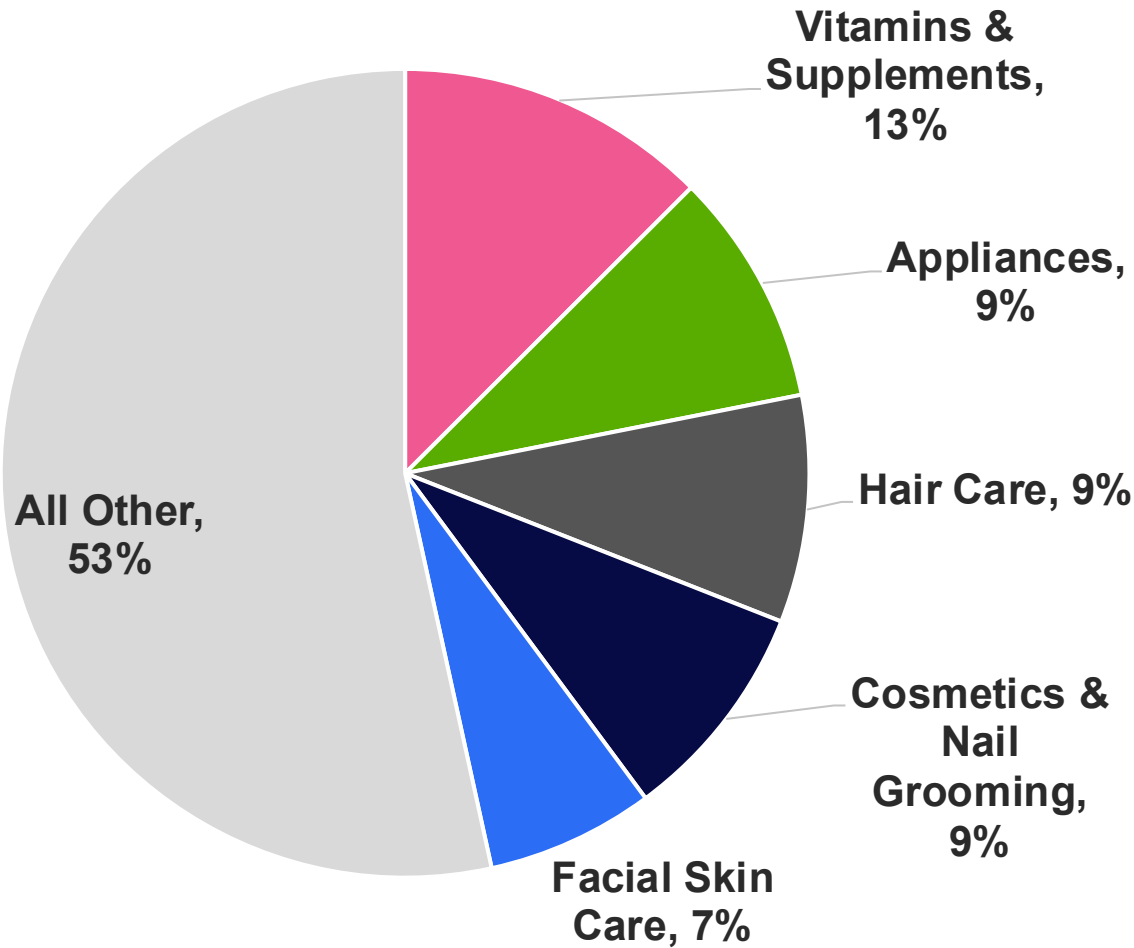
Most supplements sales happen online today

US Vitamins & Supplements \$ Sales - Share of Total Market and % Growth vs. YA

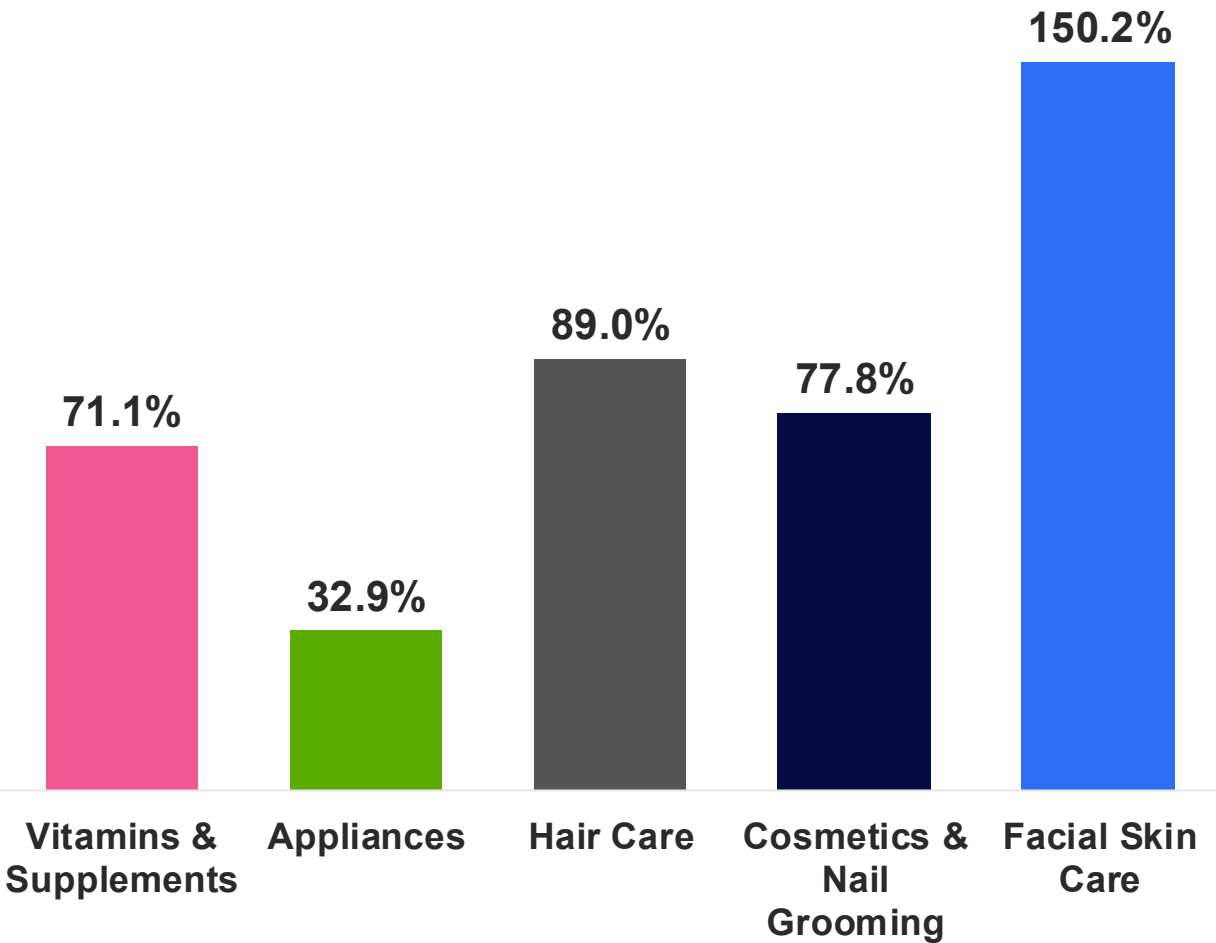


Supplements is the largest category on TikTok Shop today

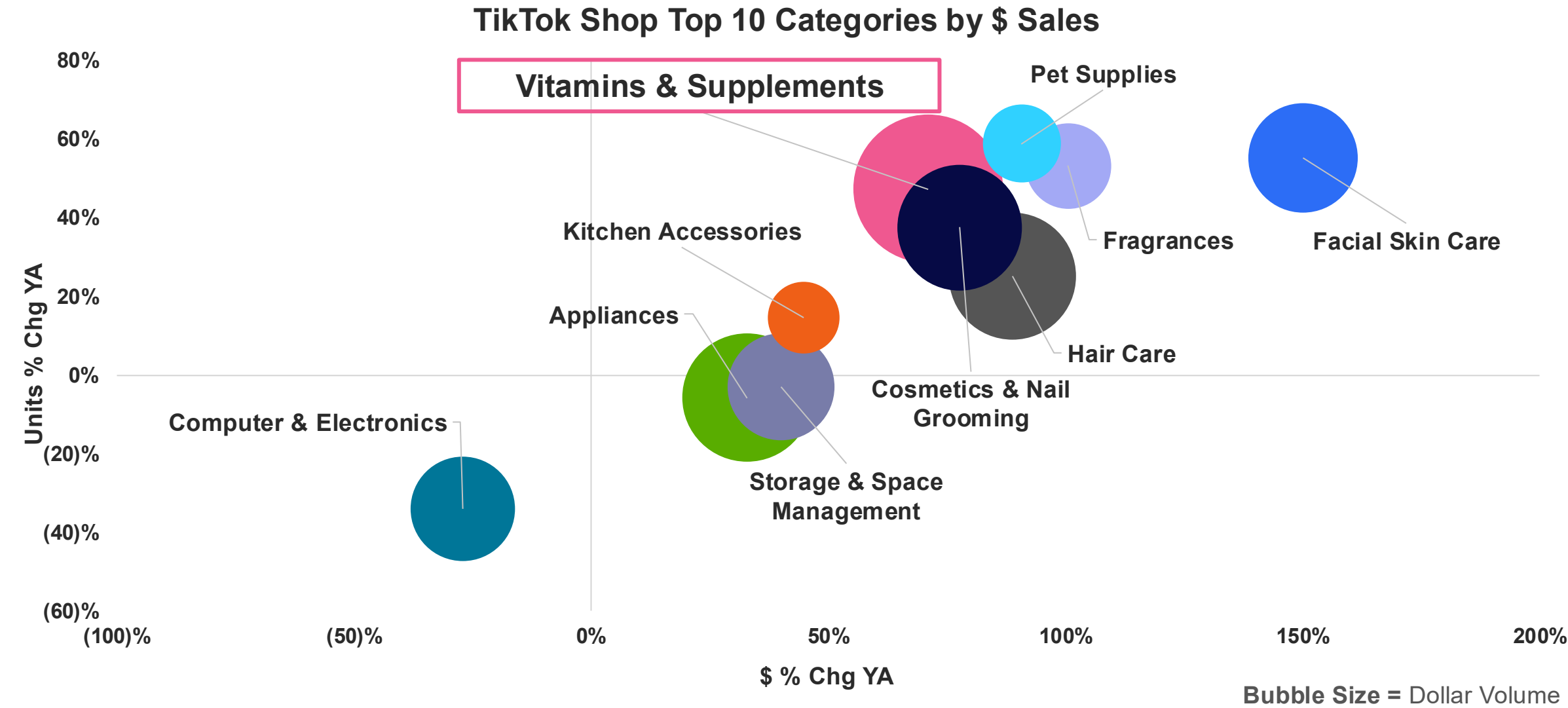
Top 5 Categories Share of TikTok Shop Total Sales



Top 5 TikTok Shop Categories \$ % Chg vs YA

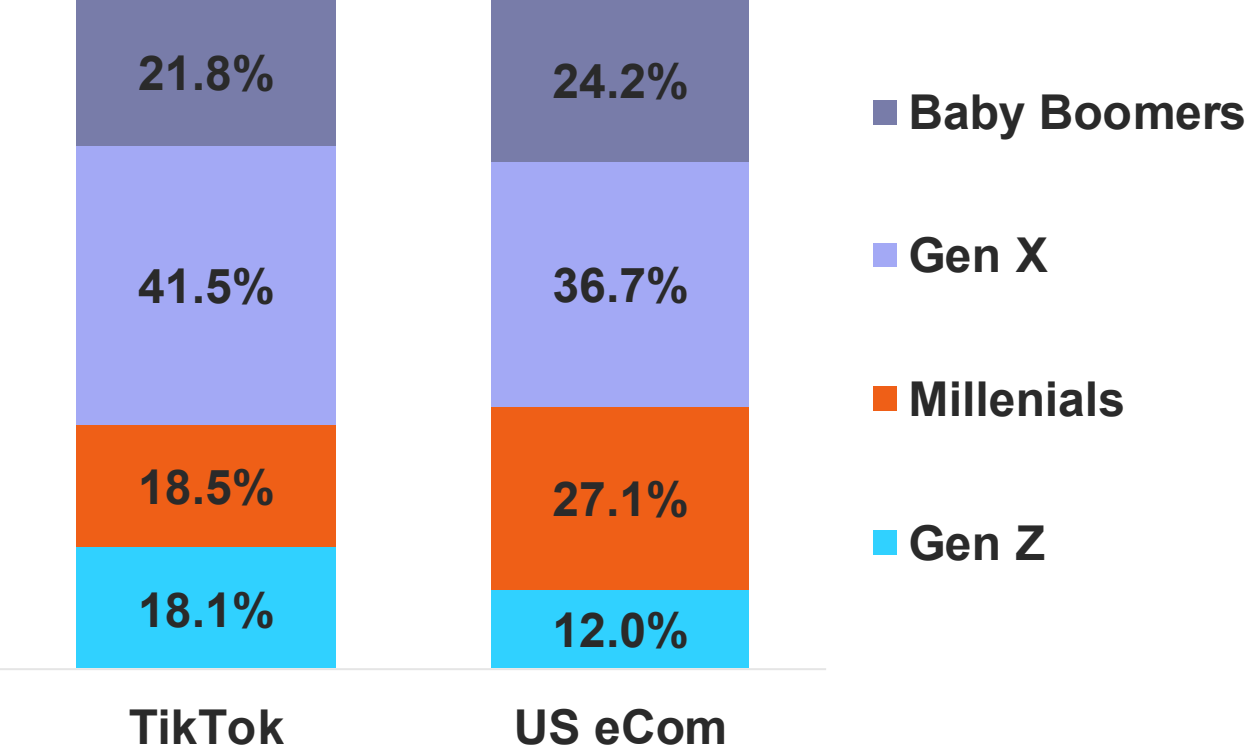


Supplements leading other TikTok categories in growth



Gen Z and Gen X over index for supplements purchases on TikTok shop

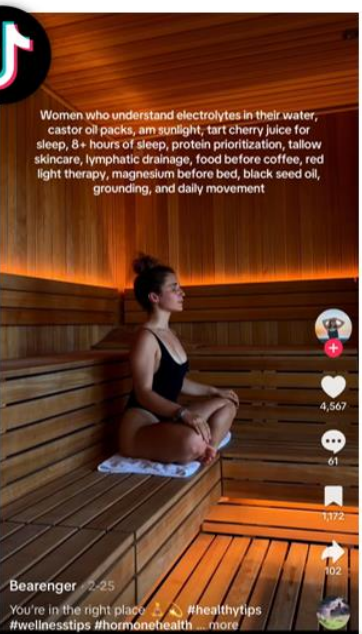
Supplements Share of \$ Sales by Generation



The influence of influencers



Women who understand electrolytes in their water, castor oil packs, am sunlight, tart cherry juice for sleep, 8+ hours of sleep, protein prioritization, tallow skincare, lymphatic drainage, food before coffee, red light therapy, magnesium before bed, black seed oil, grounding, and daily movement



Bearenger · 2-25

You're in the right place. #healthtips #wellnesstips #hormonehealth ... more

#Wellness

5.0M Posts



GRAB N GO HIGH PROTEIN SNACKS



They're 20 grams and eight grams of fiber.

Claire Edwards · 1-23

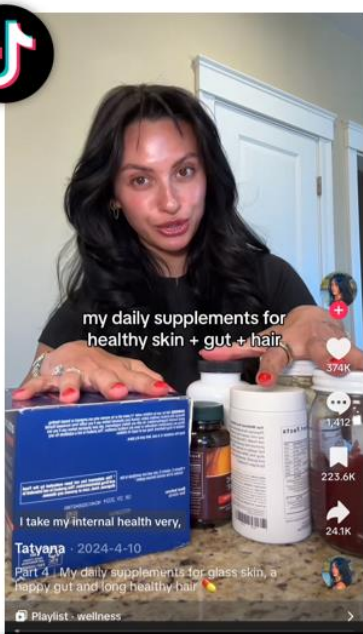
High protein snacks that aren't protein powder and greek yogurt 🍌🍌

#Protein

2.3M Posts



my daily supplements for healthy skin + gut + hair



I take my internal health very,

Tatyana · 2024-4-10

Part 4 | My daily supplements for glass skin, a happy gut and long healthy hair 🍌

Playlist · wellness

#Supplements

1.8M Posts



4 THINGS I DO EVERYDAY TO SUPPORT MY GUT from a nutritionist



Here are 4 things I do every single day to support my gut

Effect · Green Screen Video

ClaireTheNutritionist · 2022-4-11

Part 14 | for my besties with gut issues! #guthealthtips #nutritionistsoftiktok

Love You So - @The King Kha

Playlist · GUT STUFF

#GutHealth

1.4M Posts

18%
of consumers say
social media influencers
impact the brands I buy.

Gen Z X More Likely To

2.1X

Say Social Media is Media Trusted the Most

1.3X

Use Social Media to Obtain Healthcare Info

Trends to think about: Convergence of food and supplementation

	Supplements	Food and Wellness	
Beauty			Beauty + Wellness worth \$160.8B
Gut Health			Digestive Health +9% Dollars +6.5% Units
Protein			40g+ Protein per serving* +30% Dollars +31% Units
Hydration			Hydration Health (VMS) +21% Dollars +22% Units

Source: NIQ Retail Measurement Services; Total US xAOC; Total Store; NielsenIQ Product Insights; Dollars & Units % Change vs year ago; 52 weeks ending September 6, 2025 | Beauty+ Wellness Omnishopper, 52 weeks ending April 19, 2025
*Food & Beverage trends

Numerous examples of this convergence occurring

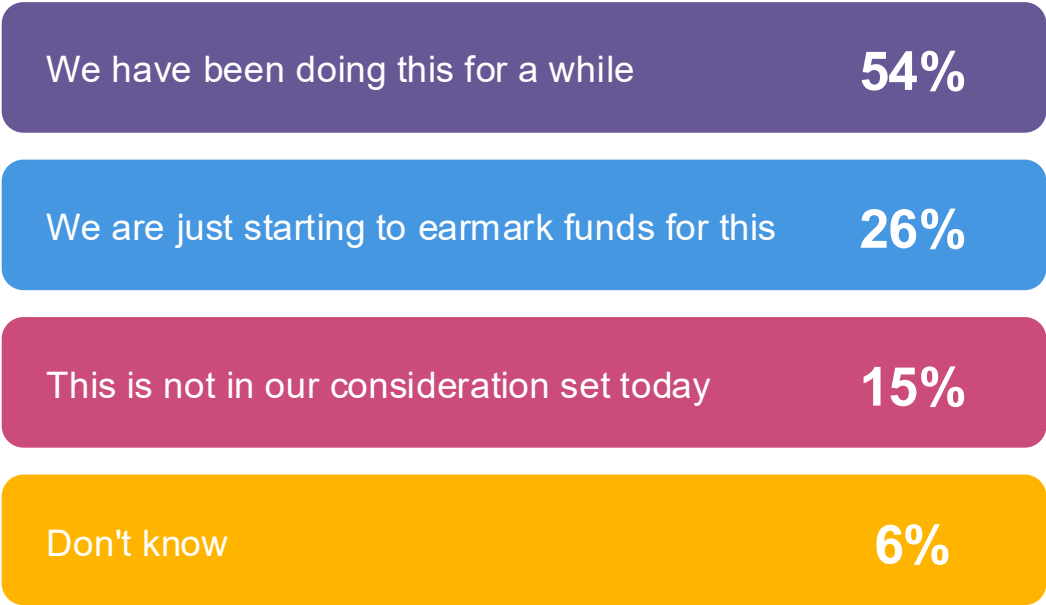
	Supplements	Food and Wellness	
Sleep/ Mood			Mood & Stress support* +50% Dollars +75% Units
Energy			Energy +6% Dollars +6% Units
Women's Health			Peri-menopause support +30% Dollars +91% Units

Source: NIQ Retail Measurement Services; Total US xAOC; Total Store; NielsenIQ Product Insights; Dollars & Units % Change vs year ago; 52 weeks ending September 6, 2025
*Food & Beverage trends

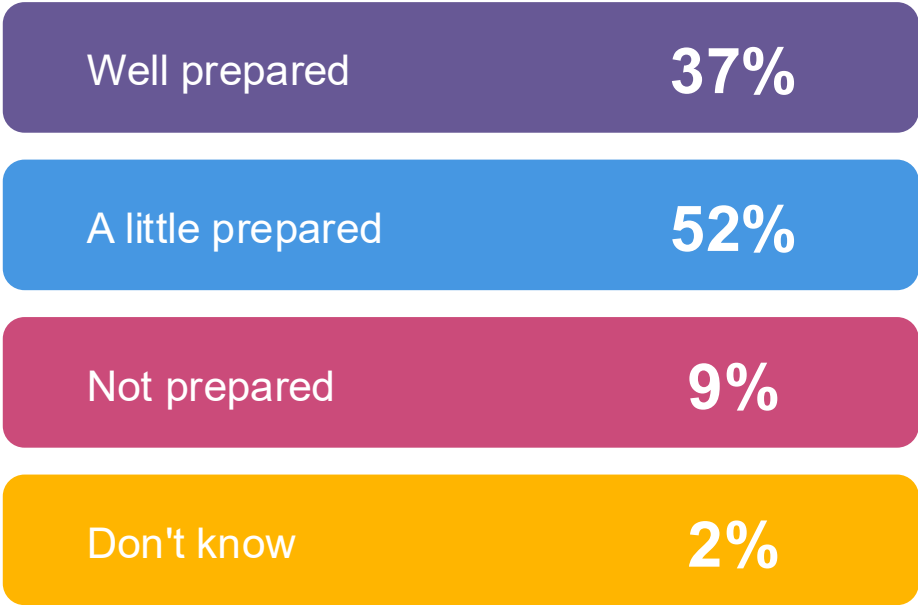
Suppliers feel a disconnect between funds allocation and preparedness with social

MANUFACTURERS

“To what extent is your company allocating funds to capitalize on social trends?”



“To what extent is your company able to quickly respond to emerging social trends



Thank you!

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