



VMS Category Report

Prepared by Pattern

June 2025



Overview / Executive Summary

This report outlines key trends in the US Consumer Health market (see appendix for covered channels), including category size, historical and forecast growth, and Amazon-specific category performance (e.g., top 30 categories size and growth); additionally, this report details Pattern VMS brands performance (e.g., growth) and ad spend

This report covers high-level trends across the following consumer health categories, with deeper focus on Sports Nutrition and VMS sub-categories:



Paediatric



Allergy Care



Weight
Management



Over-the-
counter (OTC)



Herbal /
Traditional



Sports Nutrition



VMS

Key findings

- The U.S. Consumer Health market is large at **~\$112B** in 2024 and is **growing 4-5% YoY**, with Sports Nutrition gaining share ([slide 4](#))
- Emerging consumer health trends include **increased digital discovery, all-in-one performance supplements demand, broader creatine use**, and a **shift toward natural ingredients** ([slide 5](#))
- **E-commerce is gaining share of sales** in Sports Nutrition and VMS (+15% and +14% from 2019 to 2024, respectively) ([slide 6](#))
- The Consumer Health market on **Amazon US** is **~\$16B**; Vitamins (~\$4.6B) and Sport Nutrition (~\$3.1B) segments lead in sales; majority of top categories (by revenue) are **showing robust YoY growth, especially Creatine (60%+)** ([slides 8-9](#))



Discussion Points



Agenda

1

Consumer Health Landscape: Overall US size, growth, and trends

2

Amazon US: Category size and growth

3

Pattern brands vs. VMS category performance

4

Deep Dives: Category, brand, product-level analyses

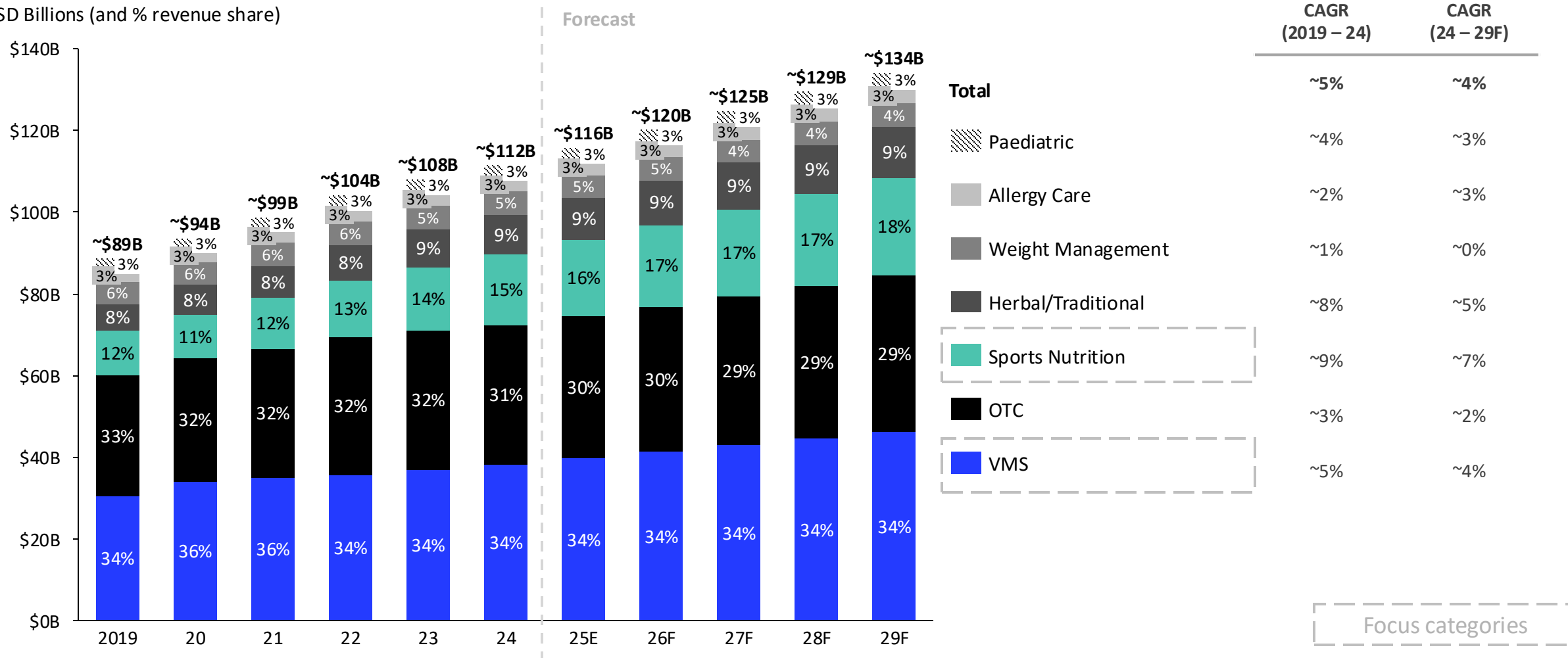
If interested, reach out to Pattern for additional data



Consumer Health Landscape | The US Consumer Health market is large (~\$112B in 2024) and growing (4-5% YoY); Sports Nutrition category is gaining share

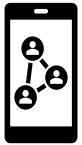
U.S. consumer health market sales¹, by category (2019 – 29F)

USD Billions (and % revenue share)



Consumer Health Landscape | Emerging consumer health trends include digital discovery, all-in-one, broader creatine use, and shift toward natural ingredients

Consumer Health market themes



Discovery in Digital & Social

- **AI and social platforms are reshaping consumer discovery**, replacing traditional SEO
- Shoppers now search “[product] + Reddit” to bypass SEO spam, while AI chatbots are playing a growing role in product research



Holistic & Performance-Driven Supplementation is Rising

- Shoppers increasingly seek **all-in-one supplements** that support energy, immunity, mood, sleep, hydration, fitness, etc.
- Specific high growth functions include **hydration** (~29% YoY), **mood support** (~18% YoY), and **immunity** (~16% YoY)



Creatine is Breaking Out of the Gym

- **Creatine is expanding beyond traditional gym** use, driven by broader positioning around benefits for bone health, brain function, sleep quality, and healthy aging
- New formats (e.g., RTDs, gummies) are gaining traction



Natural, Functional Ingredients are Winning

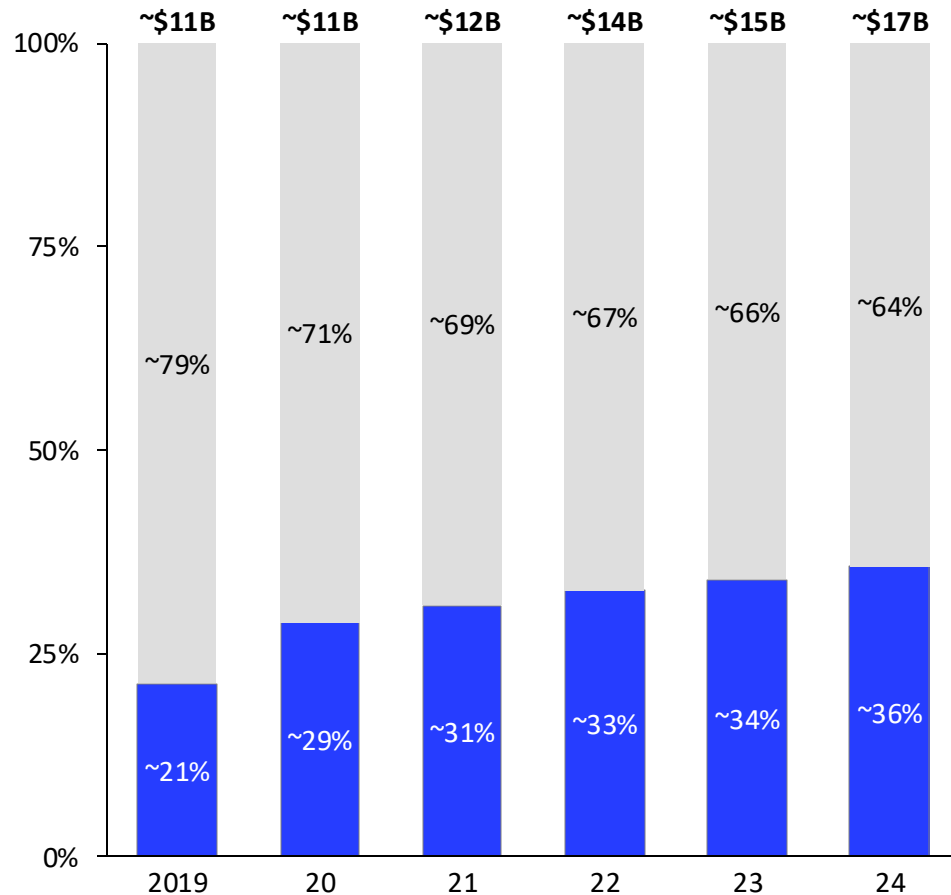
- The top trending functional ingredients by dollar growth include **ashwagandha** (~110% YoY), **magnesium** (~34% YoY), and **collagen** (~6% YoY) across all channels in 2024
- **Shoppers are shifting away from synthetic** and isolated ingredients to whole food, natural, or adaptogenic sources



Consumer Health Landscape | E-commerce is gaining share of sales across Sports Nutrition (+15% gain 2019-24) and VMS (+14% share 2019-24)

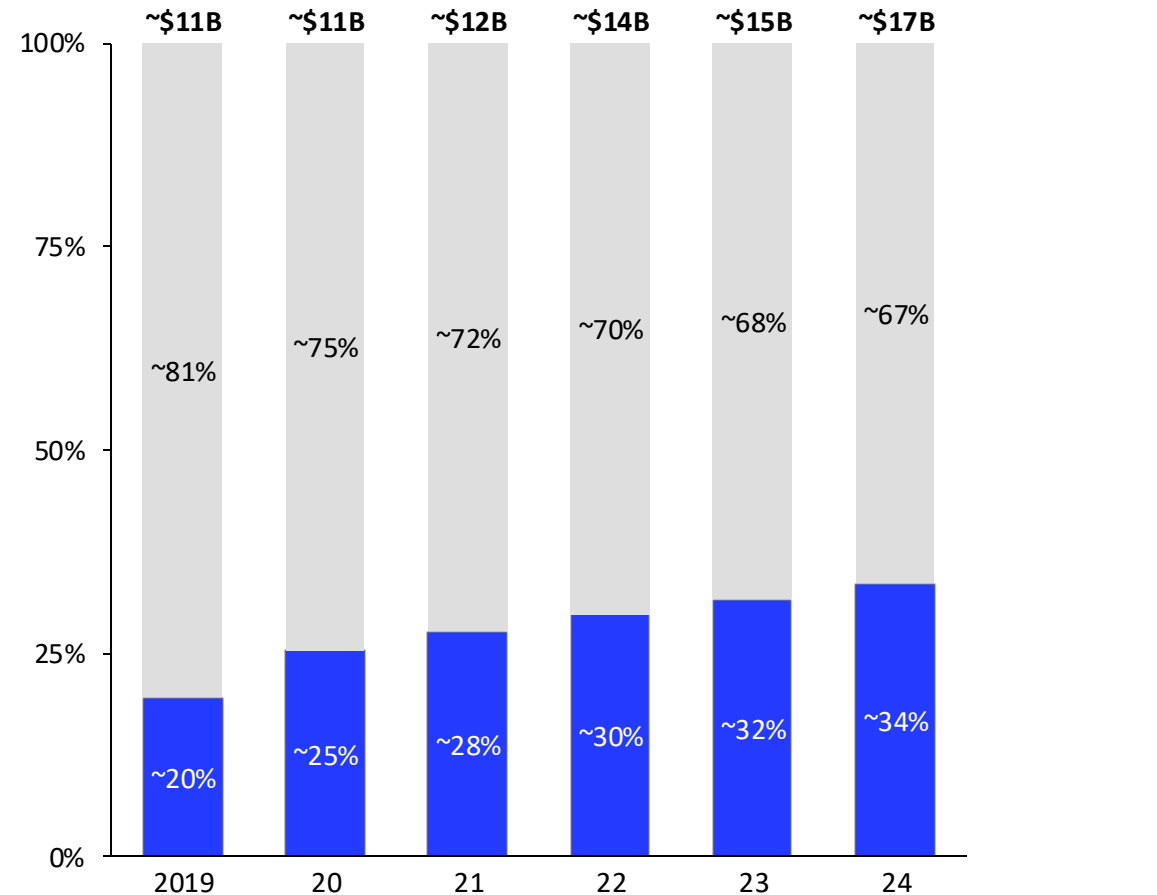
**U.S. Sports Nutrition Sales¹, by channel
(2019 - 24)**

% Share



**U.S. VMS Sales¹, by channel
(2019 - 24)**

% Share



Discussion Points



Agenda

1

Consumer Health Landscape: Overall US size, growth, and trends

2

Amazon US: Category size and growth

3

Pattern brands vs. VMS category performance

4

Deep Dives: Category, brand, product-level analyses

If interested, reach out to Pattern for additional data



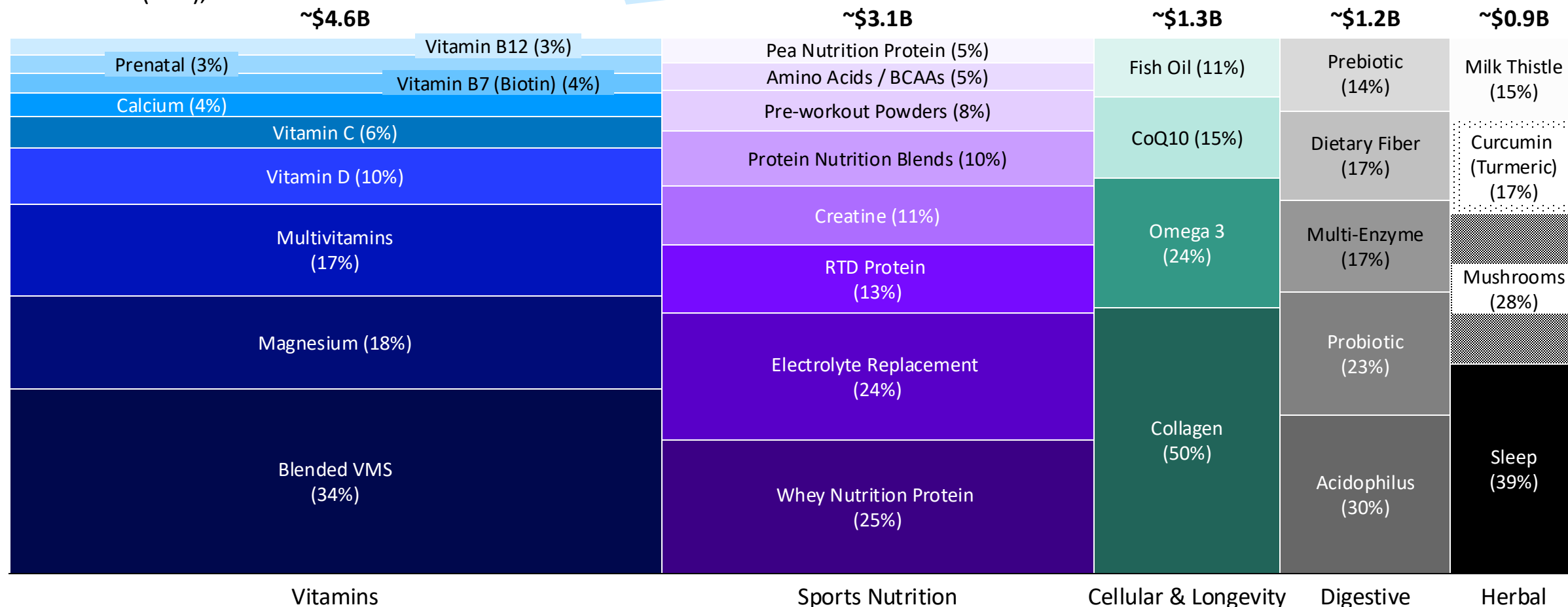
Amazon US – Top 30 Size | The Consumer Health market on Amazon US is large; Vitamins (~\$4.6B) and Sport Nutrition (~\$3.1B) segments lead in sales

Top 30 Amazon US Category¹ Sales, by Consumer Health Segment (TTM)

USD Millions (RSP), Revenue share

Directional

Top 30 categories represent ~70% value of overall consumer health market



1. Top 30 by TTM sales, which represent ~70% of overall Consumer Health market on Amazon US

Source: Pattern Internal Data as of May 2025



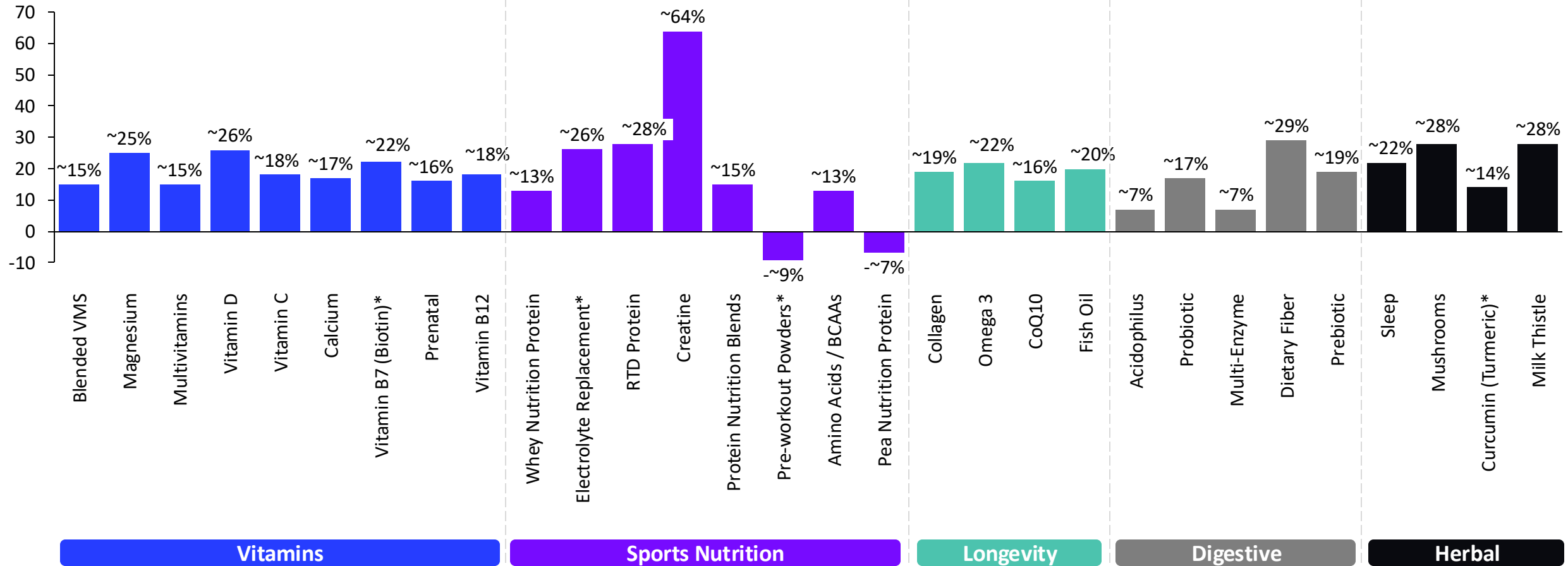
Amazon US – Top 30 Growth | Majority of top categories (by revenue) are showing robust YoY growth, especially Creatine (60%+)

Top 30 Amazon US Category¹ Sales Growth, by Consumer Health Segment (TTM)

YoY growth (%)

Directional

Top 30 categories represent ~70% value of overall consumer health market



1. Top 30 by TTM sales, which represent ~70% of overall Consumer Health market on Amazon US; * Approximated

Source: Pattern Internal Data as of May 2025

Discussion Points



Agenda

1

Consumer Health Landscape: Overall US size, growth, and trends

2

Amazon US: Category size and growth

3

Pattern brands vs. VMS category performance

4

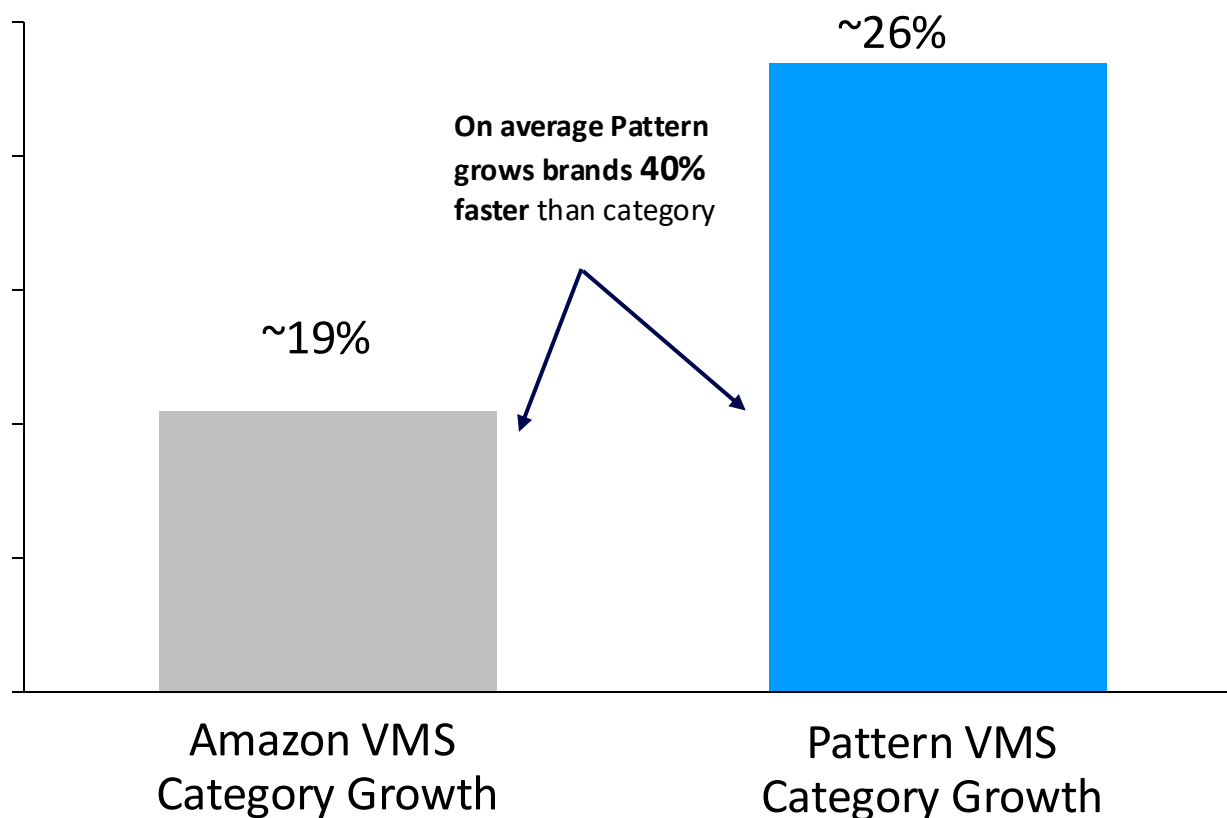
Deep Dives: Category, brand, product-level analyses

If interested, reach out to Pattern for additional data



Pattern Brands vs VMS | Pattern's VMS category is outpacing Amazon growth; on average Pattern grows brands 7% above category

Amazon US VMS vs. Pattern VMS brand sales growth (TTM)
YoY growth (%)



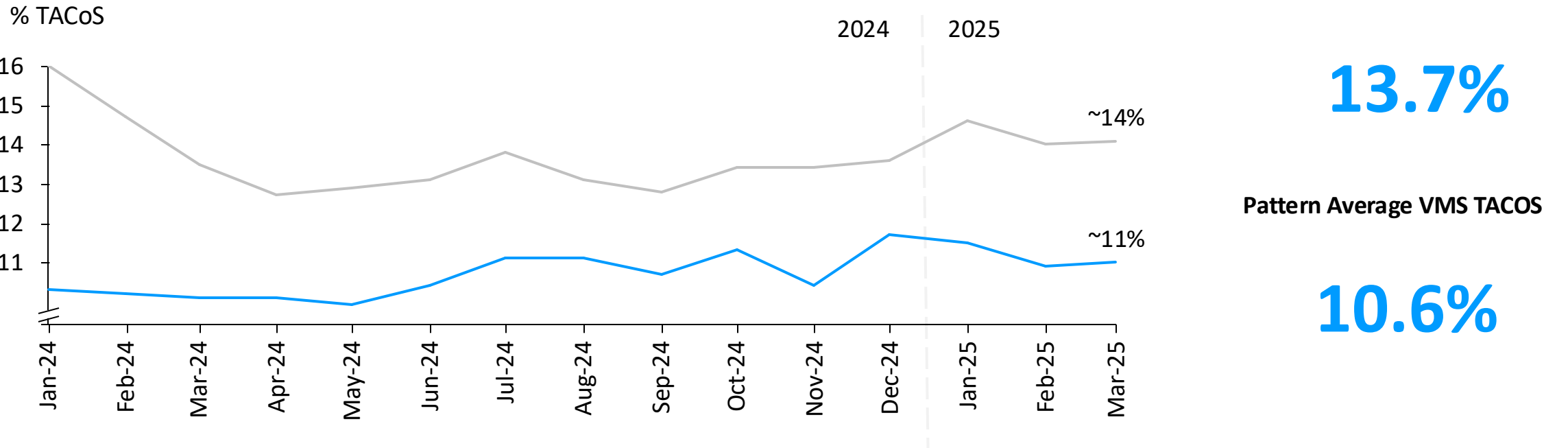
Amazon US VMS category exhibits **robust YoY sales growth** at 19%

Pattern's VMS category, outpaces with 26% YoY sales growth

Pattern's top VMS brand, outpaces by more than 2x with 47% growth

Pattern Brands vs VMS | Pattern's ad tech allows us to spend more efficiently – undercutting avg. category TACoS (i.e., Pattern spends ~11% vs category ~14%)

Pattern VMS vs. Amazon VMS TACoS
(Jan 2024 – Mar 2025)



Pattern VMS Spend Across Ad Types



Discussion Points



Agenda

1

Consumer Health Landscape: Overall US size, growth, and trends

2

Amazon US: Category size and growth

3

Pattern brands vs. VMS category performance

4

Deep Dives: Category, brand, product-level analyses

If interested, reach out to Pattern for additional data



Appendix

Report data channel coverage



Report data channel coverage

Source	Tracked channels	Description	Example Retailers / Platforms
Euromonitor	Mass Merchandisers	General retailers with health & wellness aisles	Walmart, Target, Costco, Sam's Club
	Pharmacies / Drugstores	Focused on Rx, OTC, and supplements	CVS, Walgreens
	Supermarkets	Grocery retailers with health/supplement sections	Kroger, Albertsons, Whole Foods
	Health & Natural Stores	Organic/natural product specialists	Sprouts, Natural Grocers
	Specialty Retailers	Nutrition-focused chains	GNC, The Vitamin Shoppe
	E-Commerce	Online platforms for mass & specialty retailers (1P + select 3P)	Amazon, Walmart.com, iHerb, Vitacost
Pattern	Amazon US	Includes data at leaf-node level (Amazon lowest categorization level)	Amazon only

Euromonitor's VMS data excludes some direct-to-consumer (DTC) brand websites, informal retail, peer-to-peer platforms, etc.

