

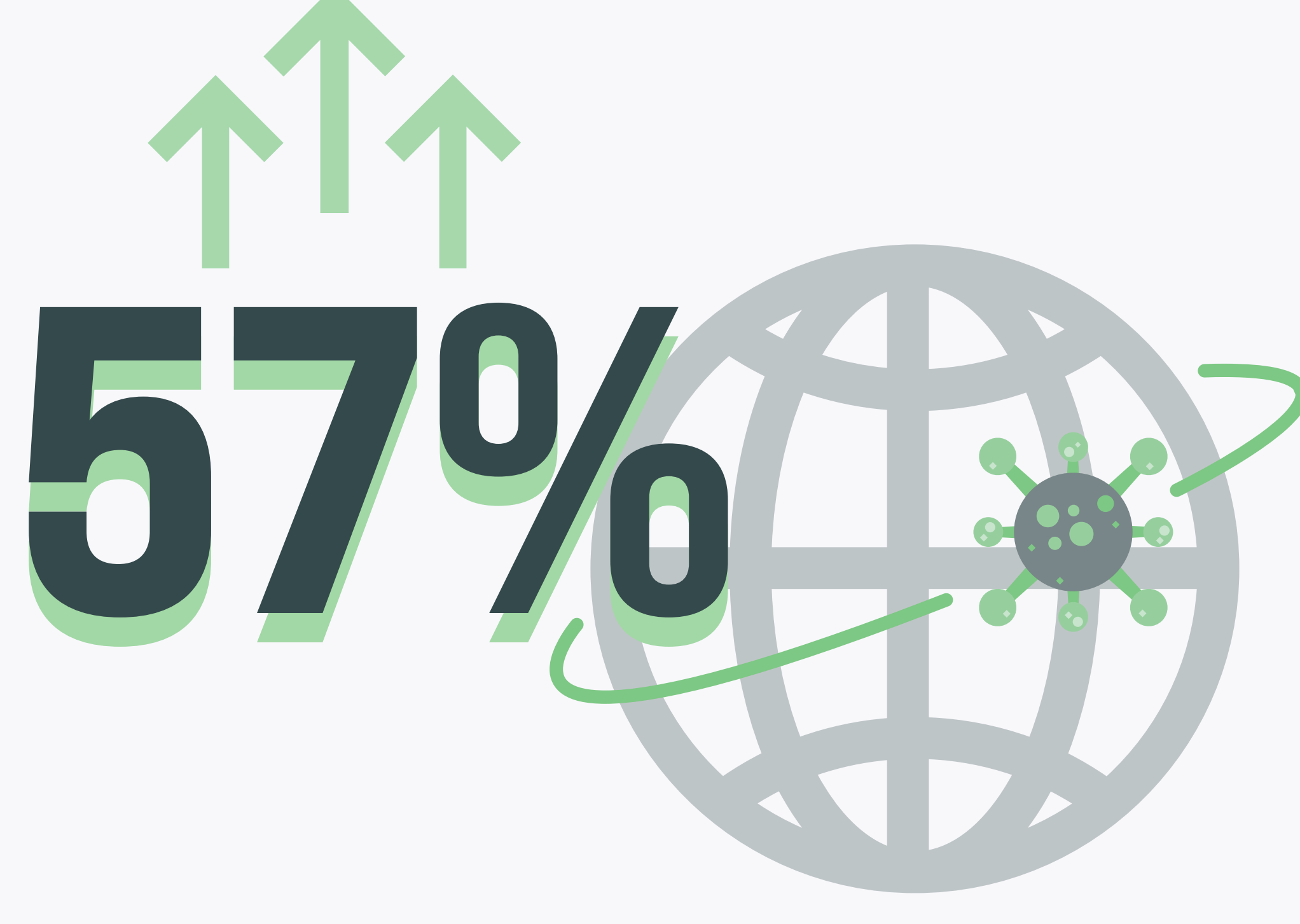


CONSUMERS WANT HEALTHY HAIR, SKIN, AND NAILS

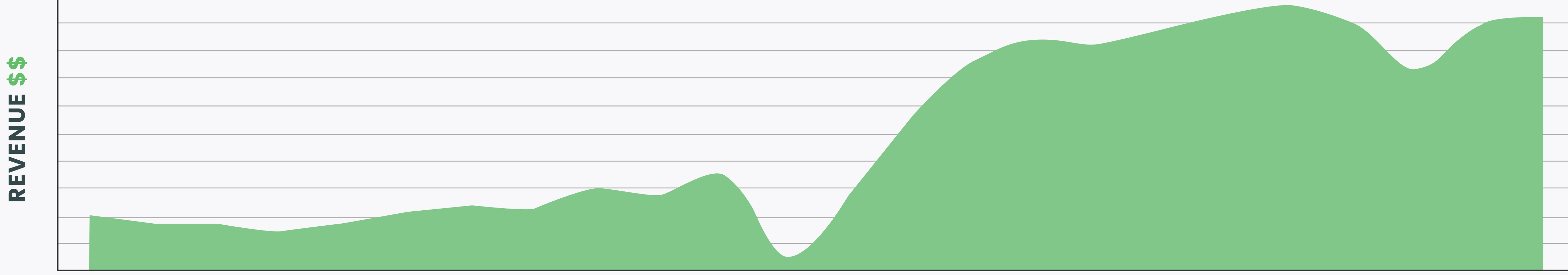
Along with using the right topical products, consumers are seeking supplements in their quest for healthy hair, glowing skin, and strong nails. These hair, skin, and nail (HSN) supplements - a core component of the "beauty-from-within" category - are seeing a sales boom on Amazon, and the competition to be a top brand is heating up.

ONLINE SALES ARE STILL STRONG IN 2021

HSN supplements experienced a 57% YoY growth rate from 2019 to 2020.



Moving into 2021, consumers are still spending the same (or more) as they did during the height of the COVID-19 pandemic.



THE COMPETITION TO BE A TOP BRAND IS HEATING UP

272
OF BRANDS WITH MEANINGFUL SALES

47%
MARKET SHARE OF THE TOP 10 BRANDS

TOP 5 BRANDS:


NUTRAFOL



While nearly half of the category market share is taken by the top 10 brands, there is still room for brands to grow and compete. In just this past year, there were 5 new entrants to the top 20 brands, each with YoY growth ranging from 212% to **2,271%**.

NUTRAFOL & SUGARBEARHAIR PRODUCTS LEAD THE WAY

The top 2 products had yearly revenue of over \$10MM this past year, while only 1 product had revenue over \$10MM the year prior.

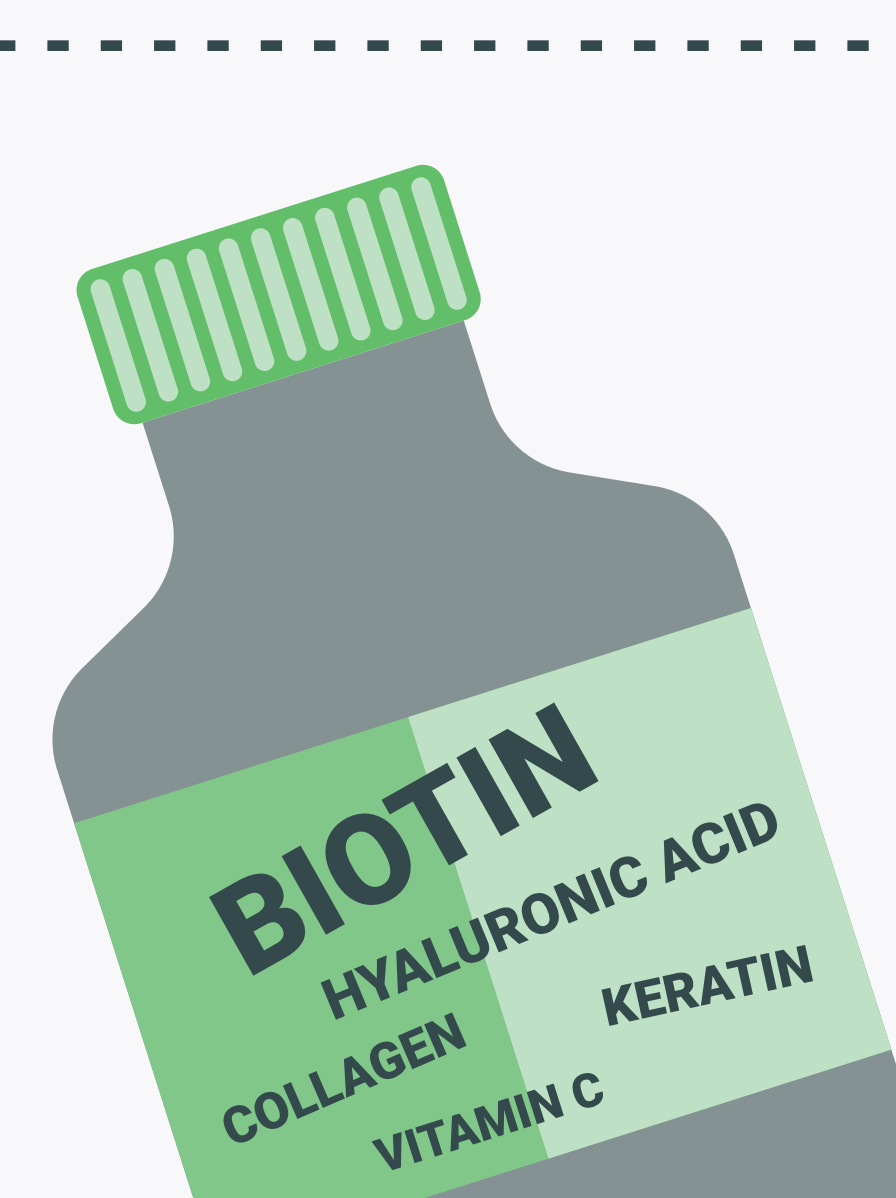
	TITLE
1	<p>NUTRAFOL</p>  <p>Nutrafol Women Hair Growth Supplement For Thicker, Stronger Hair 4 Capsules Per Day - 1 Month Supply</p>
2	<p>Sugarbearhair</p>  <p>SugarBearHair Vitamins, Vegan Gummy Hair Vitamins with Biotin, Vitamin D, Vitamin B-12, Folic Acid, Vitamin A 1 Month Supply</p>
3	<p>NATURE'S BOUNTY</p>  <p>Biotin by Nature's Bounty, Vitamin Supplement, Supports Metabolism for Energy and Healthy Hair, Skin, and Nails 10000 mcg, 120 Rapid Release Softgels</p>
4	<p>NUTRAFOL</p>  <p>Nutrafol Men Hair Growth Supplement For Thicker, Stronger Hair 4 Capsules Per Day - 1 Month Supply</p>

TOP DELIVERY FORMS SHOW CONSISTENT GROWTH

Delivery Form	Market Share	YoY Growth
Capsules	44%	56% ▲
Gummies	17%	55% ▲
Tablets	16%	55% ▲
Softgels	15%	58% ▲
Liquid	7%	61% ▲

BIOTIN IS THE MOST MARKETED INGREDIENT

In the past year, 60% of the category's total revenue came from products that were marketed as having biotin, hyaluronic acid, collagen, keratin and/or vitamin c.



Leading Ingredients	Market Share
Biotin	43%
Combination	11%
Collagen	3%
Hyaluronic Acid	2%
Keratin	0.5%
Vitamin C	0.4%

LEARN MORE

To learn more about these insights, or to dive deeper into another category, please contact insights@clearcutanalytics.com or give us a call at 773-249-0143.

About ClearCut Analytics' Retail Insights

ClearCut is a retail analytics provider based in Chicago, Illinois. Its eCommerce and Amazon sales analytics offer the earliest indicator of emerging consumer and product trends and what's next for the CPG industry. With ahead-of-the-curve and accurate insights, brands and manufacturers are empowered to decisively act on innovation and go-to-market strategies with confidence.