

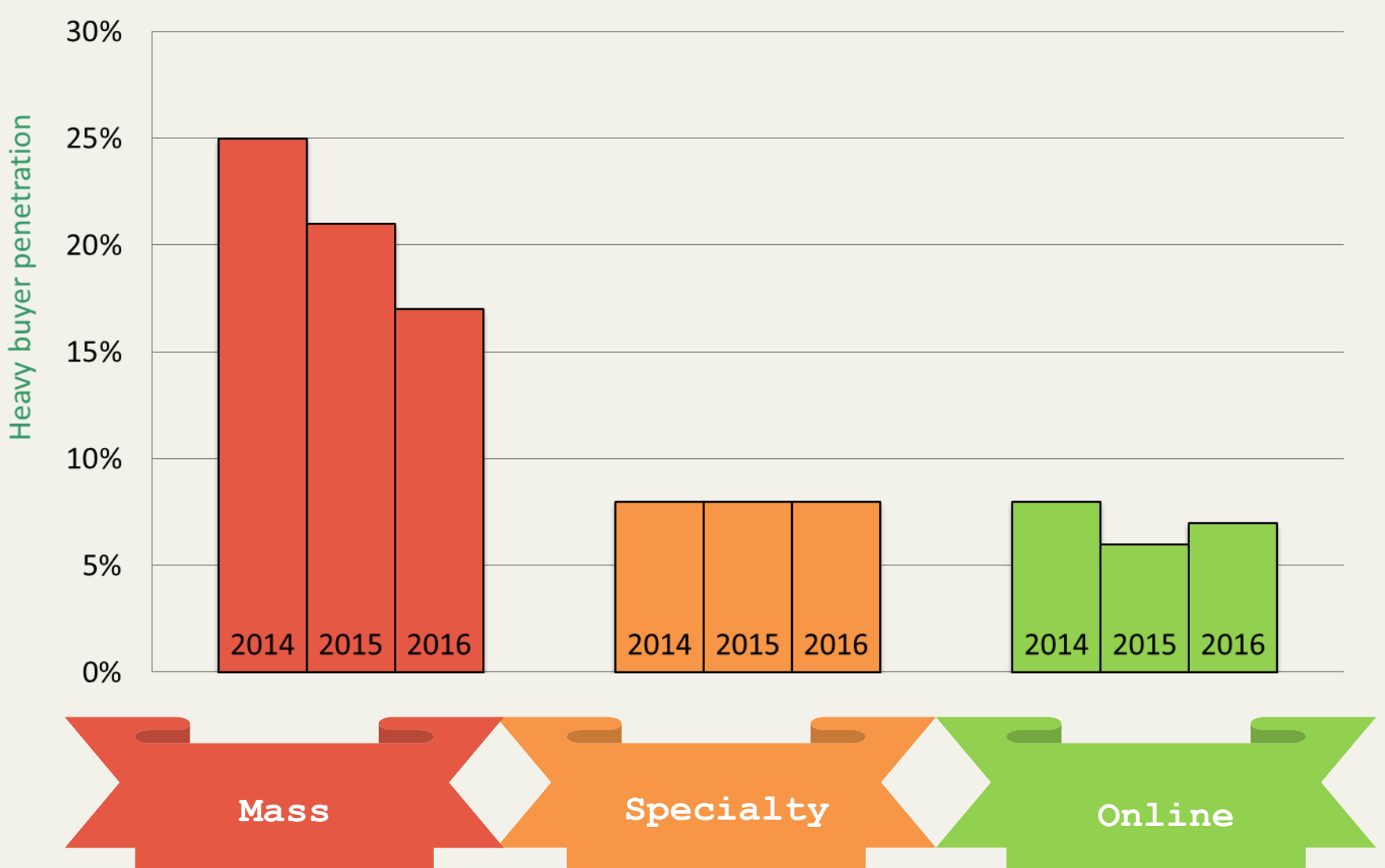
'Heavy Buyers' Decline

TABS study shows fewer in Mass Market

The 2016 TABS Analytics Vitamin Study showed that the mix of category buyers is changing. The number of heavy buyers (3 or more types in a year) has decreased and the number of light buyers (1-2 types) has increased. Purchase penetration, buying a type at least once in the past year, for these buyer types looks different than it did in 2014.



Heavy buyer penetration by channel



As a result, share is down for most mass market outlets in 2016 and up for most specialty outlets.

Retailers with outlet share declines



Retailers with outlet share gains

*FDMCD is defined as Food, Drug, Mass, Club and Dollar stores.