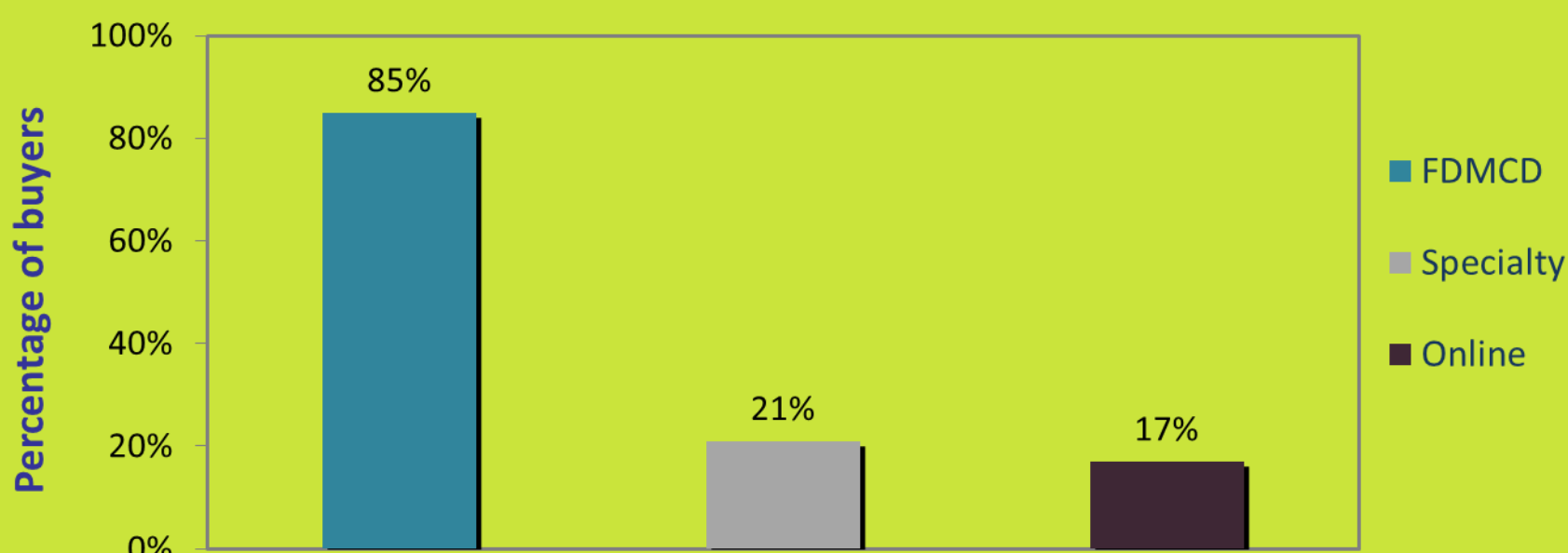


It's Still An FDMCD World But It's Shrinking A Bit



FDMCD* is the dominant channel in VMS

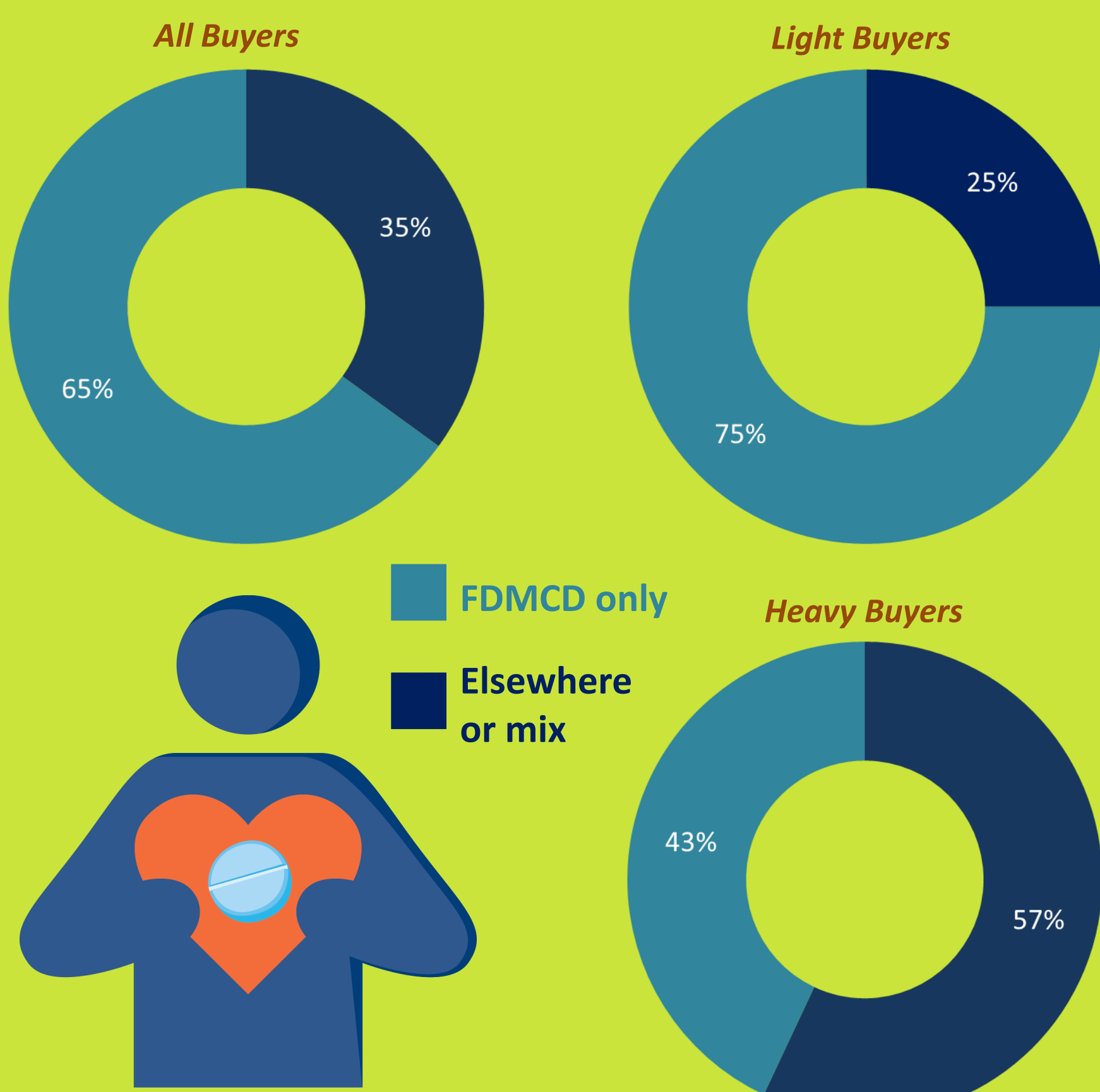
What percentage of buyers shop at which channels?



* FDMCD=Food, Drug, Mass, Club, Dollar Stores

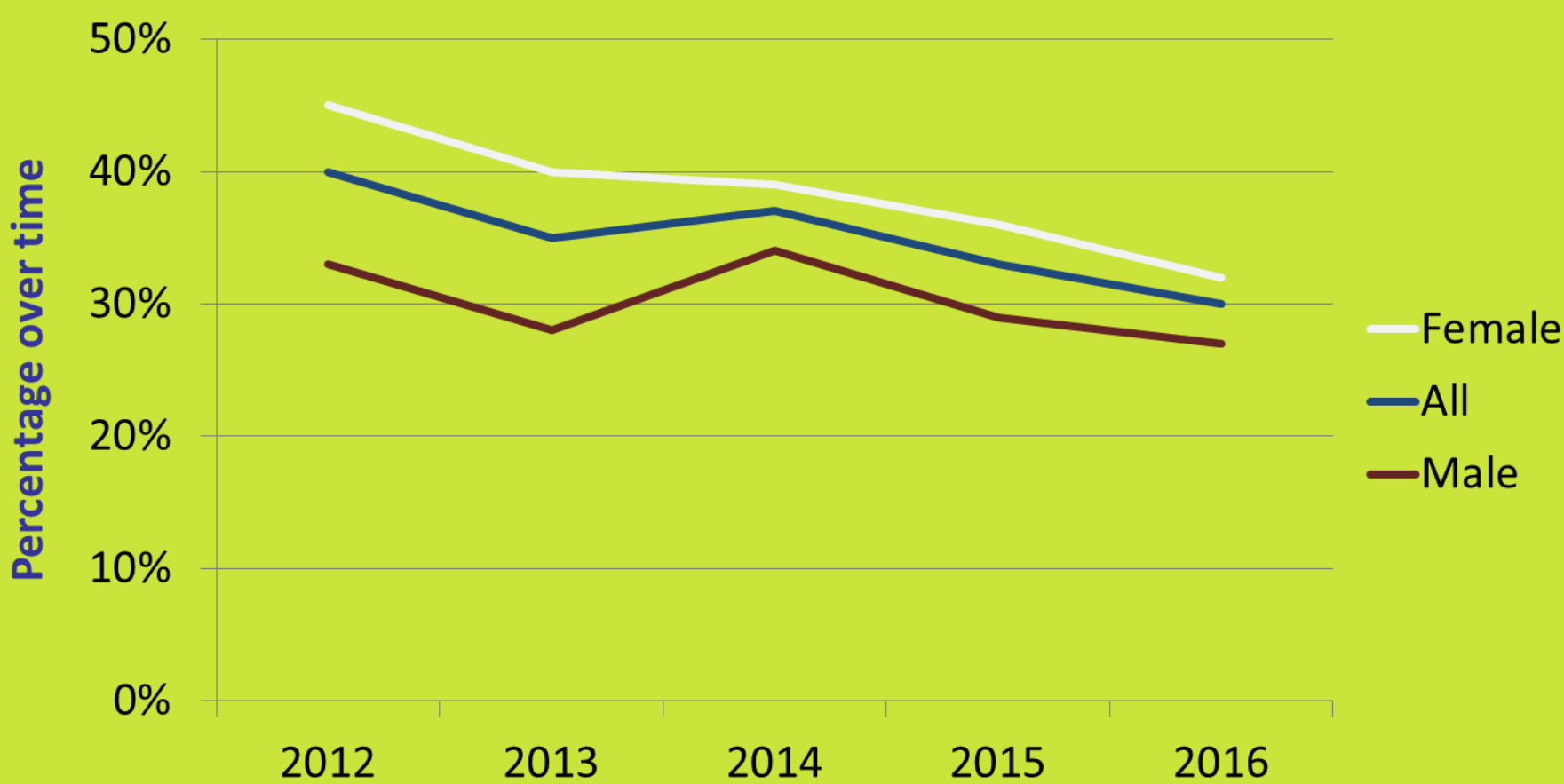
(Due to overlap, percent goes over 100)

Most heavy buyers* (57%) are not exclusive to the FDMCD channel



As heavy buyers decline, the largest drop is seen among women. In each of the last five years, the percentage of female VMS purchasers who are heavy buyers has dropped.

Percentage of buyers who are heavy buyers by group



TABS Analytics

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Source: TABS Analytics 2016 Vitamins Study. 1,017 General Population Adults ages 18-75. "Vitamins" defined as the following types: Adult Multi-Vitamins, Child Multi-Vitamins, Eye Health Multi-Vitamins, Vitamin C, Vitamin B, Vitamin E, Vitamin D, Fish Oil/Omega3/Krill Oil, Probiotics, Women's Health, Herbal, Calcium, Other minerals (Magnesium, iron, potassium, etc.), CoQ10, Melatonin and Joint Health.