

Strategic Information for the Nutrition Industry



# Nutrition Business Journal™

# NBJ's SUPPLEMENT BUSINESS REPORT 2005

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4	Alacer	46	Goen Group (TrimSpa)
5	Allergy Research Group	47	Green Pharmaceuticals
6	American Health Sciences	48	Hain Celestial
7	Amerifit	49	Health & Nutrition Systems/Ashlin Development Corp.
8	Anabolic Labs	50	Healthy Directions (Doctor's Pref.)
9	Apex Fitness	51	HVL Inc. (Douglas Labs)
10	Arizona Natural Products	52	Impact Nutrition
11	Arkopharma / Health From The Sun	53	Integrative Therapeutics
12	AST Sports Science	54	Integrated BioPharma (Agrolabs)
13	Atkins Nutritionals	55	Inverness
14	Barlean's Organic Oils	56	Isatori Global Technologies
15	Basic Research (Zoeller Labs)	57	ISS Research
16	Bausch & Lomb	58	Jarrow Formulas
17	Bayer	59	Kaizen Nutrition
18	Beehive Botanicals	60	Knight-McDowell Labs
19	Berkeley Premium Nutraceuticals	61	Labrada Bodybuilding Nutrition
20	Bluebonnet Nutrition Corporation	62	Lane Labs
21	Bodyonics	63	Leiner Health Products*
22	Boiron USA	64	Lichtwer Pharma US
23	Botanical Labs	65	Life Extension
24	Bricker Labs	66	Maharishi Ayur-Ved Products Int'l, Inc.
25	Bristol Myers Squibb / Mead Johnson	67	Maitake Products, Inc.
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27	Celebrity Products Direct	69	Max Muscle
28	Champion Nutrition	70	Maximum Human Performance
29	Chattem (Sunsorce)	71	McNeil Nutritionals, LLC
30	Continental Vitamin	72	Medical Research Institute
31	Country Life	73	Medifast
32	Crystal Star Herbal Nutrition	74	Megafood
33	Cytodyne	75	Metabolic Maintenance Products
34	CytoSport	76	Metabolic Response Modifiers
35	Delavau*	77	Metabolife International
36	Enzymatic Therapy	78	Metagenics
37	Enzymedica	79	Mission Pharmacal
38	Experimental & Applied Sciences (EAS)	80	MLO Products
39	Fizogen Precision Technologies	81	Muscle Marketing USA
40	Flora Inc.	82	MuscleTech
41	Futurebiotics	83	National Enzyme Company
42	Garden of Life	84	Natrol

85	<b>Naturade Inc.</b>	123	<b>PowerMedica</b>
86	<b>Natural Alternatives International, Inc.</b>	124	<b>Prince of Peace Enterprises</b>
87	<b>Natural Balance</b>	125	<b>ProForm Labs</b>
88	<b>Natural Organics (Nature's Plus)</b>	126	<b>Progressive Laboratories*</b>
89	<b>Naturally Vitamins, Inc.</b>	127	<b>Pure Encapsulations</b>
90	<b>Nature's Answer</b>	128	<b>Quigley Corporation</b>
91	<b>Nature's Benefit</b>	129	<b>Rainbow Light Nutritional Systems</b>
92	<b>Nature's Best</b>	130	<b>Real Health Laboratories</b>
93	<b>Nature's Life</b>	131	<b>Ricola</b>
94	<b>Nature's Secret</b>	132	<b>S.A.N. Corp.</b>
95	<b>Natures Way Products (B&amp;T)</b>	133	<b>SciFit</b>
96	<b>NBTY</b>	134	<b>Similasan USA</b>
98	<b>Nestle</b>	135	<b>Source Naturals</b>
99	<b>Next Proteins International</b>	136	<b>Spectrum Organic Products, Inc.</b>
100	<b>Nordic Naturals</b>	137	<b>SportPharma</b>
101	<b>Novartis</b>	138	<b>Standard Homeopathic</b>
102	<b>Novogen, Inc.</b>	139	<b>Standard Process</b>
103	<b>Now Foods</b>	140	<b>Summa Rx Laboratories, Inc.</b>
104	<b>Nutraceutical International</b>	141	<b>Supernutrition</b>
105	<b>Nutraceutix</b>	142	<b>Symco</b>
106	<b>NutraMax</b>	143	<b>Thermo-Life International</b>
107	<b>Nutrex Research</b>	144	<b>Thorne Research</b>
108	<b>Nutrition Now, Inc.</b>	145	<b>TwinLab Corporation</b>
109	<b>Nutritional Labs International*</b>	146	<b>Ultimate Nutrition, Inc.</b>
110	<b>NVE Pharmaceutical</b>	147	<b>Unilever (SlimFast)</b>
111	<b>NX Nutritionals (Vermo Max)</b>	148	<b>Universal Nutrition</b>
112	<b>Olympian Labs</b>	149	<b>VitaMist</b>
113	<b>Omni Nutraceuticals (Irwin/4Health)</b>	150	<b>Vitatech International*</b>
114	<b>Optimum Nutrition</b>	151	<b>Wakunaga of America</b>
116	<b>Pacific Nutritional Inc.*</b>	152	<b>Weider Nutrition Group</b>
117	<b>PacificHealth Laboratories Inc.</b>	153	<b>Wellements (formerly M.D. Labs)</b>
118	<b>PatentHealth (PatentLean)</b>	154	<b>Windmill Consumer</b>
119	<b>Perrigo*</b>	155	<b>Window Rock Health Labs</b>
120	<b>Pharmaton Natural Health Products</b>	156	<b>Wyeth (formerly AHP)</b>
121	<b>Pharmavite*</b>	157	<b>Yerba Prima</b>
122	<b>Planetary Formulas/Threshold</b>		

## 20. RETAILER PROFILES

#	Company	#	Company
1	Albertson's	15	NutriSport
2	Balducci's	16	Pharmaca Integrative Pharmacy
3	Basha's Supermarkets	17	Rite Aid
4	BJ's Wholesale Club	18	Safeway
5	Copps Food Centers	19	Sam's Club
6	Costco	20	(Seattle) Super Supplements
7	CVS	21	Trader Joe's
8	Earth Fare	22	United Supermarkets
9	Fruitful Yield	23	Vitamin Cottage
10	Giant Food	24	Vitamin Shoppe
11	GNC	25	Vitamin World
12	Great Earth	26	Wal-Mart
13	K-Mart	27	Whole Foods
14	MaxMuscle	28	Wild Oats

## 21. DIRECT TO CONSUMER SUPPLEMENT PROFILES

#	Company	#	Company
1	AARP	25	Global Health Trax
2	AMS Health Sciences, Inc.	26	Golden Neo-Life Diamite Intl.
3	Advocare International	27	Great American Products
4	Allergy Research	28	Guthy Renker
6	Altacor (Amway, Nutrilite, Quixtar)	29	Herbalife
7	American Health	30	Home Shopping Network
8	Apex Fitness Group	31	Infinity2
9	Avon Products	32	Integrative Therapeutics
10	Basic Research	33	Integris Global
11	Berkeley Premium Nutraceuticals	34	IsaGenix
12	Beverly International	35	ITV Direct (Supreme Greens)
13	Blue Spring International	36	Kan Herbs
14	Bodywise International	37	Life Enhancement
15	Carter-Reed	38	Life Force International
16	Castle Body Health	39	LifeExtension
17	Cortislim (Window Rock Health Labs)	40	Lifeline Technologies
18	Designs for Health	41	Mannatech
19	Discount Vitamins & Herbs	42	MDR Fitness Corp. (MDR Vital Factors)
20	Doctor's Preferred (Healthy Directions LLC, formerly Phillips Health LLC)	43	Melaleuca
21	Douglas Labs	44	Mera Pharmaceuticals
22	Drugstore.com	45	Metabolic Maintenance
23	Forever Living	46	Metagenics
24	FreeLife International	47	MuscleMaster.com

48	<b>Natren</b>	68	<b>Standard Process</b>
49	<b>Naturalist.com (Mothernature)</b>	69	<b>Suarez Corp / Biotech Research (AbGone)</b>
50	<b>Natural Health Trends Corp. (Kaire, Lexus)</b>	70	<b>Sun Chlorella</b>
51	<b>Nature's Sunshine</b>	71	<b>Sunrider</b>
52	<b>NBTY</b>	72	<b>Swanson Health Products</b>
53	<b>New Vision Intl.</b>	73	<b>Symmetry Corporation</b>
54	<b>Neways International</b>	74	<b>Tahitian Noni International (Morinda Holdings Inc.)</b>
55	<b>NSA (Juice Plus+)</b>	75	<b>Thorne Research</b>
56	<b>Nutritionproducts.com</b>	76	<b>Goen Group (TrimSpa)</b>
57	<b>Obesity Research Institute (Propolene)</b>	77	<b>TriVita Inc. (TriVita Way)</b>
58	<b>Oxyfresh Worldwide</b>	78	<b>Unicity International</b>
59	<b>Pharmanex (NuSkin)</b>	79	<b>USANA</b>
60	<b>Progressive Labs</b>	80	<b>Vitamark Corp. (formerly Vitacorp Int.)</b>
61	<b>Pure Encapsultions</b>	81	<b>Vitacost.com</b>
62	<b>Purity Products (Ultimate HA)</b>	82	<b>Vital Basics (Focus Factor)</b>
63	<b>QVC</b>	83	<b>Vitalife</b>
64	<b>Reliv International</b>	84	<b>VitaminLab.com</b>
65	<b>Seroyal International</b>	85	<b>VitaminShoppe.com</b>
66	<b>Shaklee (Activated/Ripplewood)</b>	86	<b>Wellness International</b>
67	<b>Sportron International</b>	87	<b>Welnia</b>
		88	<b>XanGo</b>

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### **NBJ Supplement Report 2004 Snapshot**

NBJ forecasts average annual growth in the supplement business of 4% for the period 2005-2013. Fluctuations resulting from new products, new science, new regulations, newly allowed claims and the ever-changing economy are expected, if not directly forecast.

*NBJ's Supplement Business Report 2005* is a compilation of NBJ research conducted and compiled since 1995. Some of the material was developed during ongoing research for *Nutrition Business Journal*, and readers of both this report and NBJ may encounter some familiar passages. We at NBJ have always found our work not only challenging, but also intriguing and stimulating. Quantification and assessment of the nutrition industry is a daunting yet fascinating task—and one that demands constant readjustment and review as the industry evolves. Like most of participants in the supplement industry with whom we have spoken since we first conceived of NBJ in 1995, there is nothing else we'd rather be doing.

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### Data Methodology

NBJ's basic methodology for nutrition industry quantification has been a complete compilation and assessment of existing data on the industry, augmented by NBJ surveys and interviews. Data is compiled and analyzed at each level of the value chain: consumer spending data (Hartman, NMI and Nielsen, for instance), retail sales figures (IRI & AC Nielsen for mass market and SPINS, Natural Foods Merchandiser and Whole Foods magazine for natural food store data), alternative channels (NBJ surveys on multilevel marketing, catalog, practitioner and internet sales), manufacturer sales (NBJ surveys) and raw material supplier data (NBJ surveys). Individual company data is also collected through surveys or secondary sources. NBJ also conducts a minimum of 40-50 interviews with executives every month to capture both qualitative and quantitative information.

NBJ's business segment survey methodology starts with an understanding of the total universe of companies in that segment and an in-depth knowledge of the top 20-100 companies in that segment that account for a strong majority of sales. NBJ then makes every effort to ascertain annual sales of the top firms and get an adequate response from surveying the remaining populace to build a statistically valid model for that segment. Segments NBJ surveys in this detailed manner include supplement manufacturers in each category, raw material suppliers in vitamins and herbs & botanicals, MLM firms, internet sellers, catalog sellers, etc. NBJ will typically capture 60-80% of the revenues in a defined segment using this method. Subsequently breakdowns received from companies are aggregated into segment models to obtain industry or segment breakdowns by product, sales channel or other characteristic.

Sales data determined from each level of the nutrition industry value chain is reconciled against the other levels so consumer sales, retail sales, wholesale sales, distributor sales and material supply sales ratios are accurate for each product area.

While NBJ has made every effort to be accurate in its data collection and presentation, it is impossible to be perfect and the authors beg your understanding of any inaccuracies that appear in this report. In addition, NBJ's data is constantly updated given best available data so that in some cases previously published data may be inconsistent with the data printed in this report. Conversely data is printed in NBJ issues after the September 2005 NBJ issue or in subsequent reports will represent best available data as of that time. Any questions regarding data sources and/or methodology may be addressed to NBJ Editor Grant Ferrier or NBJ Research Manager Katja Rauhala ([research@nutritionbusiness.com](mailto:research@nutritionbusiness.com)).

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