

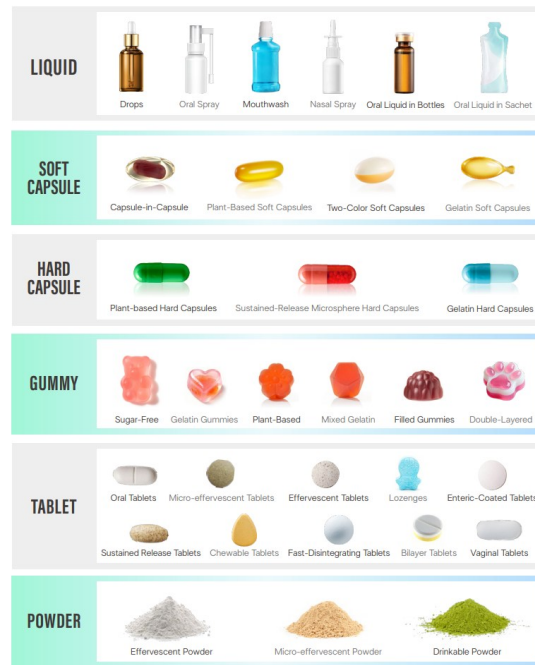
Global Nutritional Supplements Trend Report

Three accelerating structural shifts: supply, compliance, and precision

2026

Q4 2026

Data Cutoff:
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releases and authoritative
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1.1. Product categories are shrinking, while ingredient content is on the rise.

In the U.S., the sleep-aid category has seen an overall decline of 3.9%, yet search volume for magnesium has surged by 49.2%. Similarly, interest in the weight-management category has dropped by 7.4%, while searches for berberine have grown by 66.4%. Consumers are no longer purchasing based on "product categories"; instead, they are buying into "specific, named ingredients." Consequently, brand competition in Q4 will shift from "capturing a category" to "capturing an ingredient keyword."

The draft revision to China's Food Safety Law explicitly stipulates, for the first time, that domestic entities involved in cross-border e-commerce shall bear the responsibilities of an "advertiser" and the obligations related to product recalls. It also mandates that all labeling information on transaction pages be presented in Chinese. The fourth quarter serves as a critical window for cross-border brands to re-evaluate who is shouldering the risks.

1.2. Compliance Shifts from Addressing "Cross-Border Arbitrage" to Enforcing "Domestic Accountability"

1.3. The dividends from dosage-form innovation are fading, while precision is gaining in value.

While the growth of gummies, powders, and effervescent tablets continues, the FDA's focus on quality control for gummies—alongside sharp criticism from Reddit users, who argue that "buffered magnesium" formulas are essentially just laxatives rebranded with a magnesium label—indicates that both consumers and regulators are becoming increasingly intolerant of products where "form takes precedence over substance."

Q4 Momentum in the Women's Health and Longevity Sector

Q4 Outlook:
In the fourth quarter, the women's health and longevity sector will see a "divergence in formulations."

The autumn trend report released by Vitaquest at the end of Q3 provides a baseline for category projections for Q4:

Category	Market Size	Growth Rate/Forecast
Women's Health Supplements	\$57.4 billion in 2024	US\$77.5 billion in 2030
American Longevity and Health Supplements	\$6.38 billion in 2025	\$11.53 billion in 2035
Energy supplements	US\$1.12 billion in 2025	\$1.58 billion in 2030
Cognitive Enhancement / Cognitive Health	\$5.7 billion in 2025	\$19.5 billion in 2034

In Q4, the women's health and longevity sectors will see a "divergence in formulation" strategies:

- **Women's Health:** A shift from "general menopausal support" toward complex formulations targeting bone health, "beauty-from-within," and the use of probiotics or plant-based ingredients.
- **Longevity:** A move away from "concept-driven marketing" toward ingredients backed by biomarkers—such as NAD+ precursors, Omega-3 fatty acids, and polyphenols.
- **Energy:** A transition from "stimulation" to "sustained energy."
- **A key shift in supplements:** Moving away from "high-caffeine stimulation" toward formulations designed for "steady energy, enhanced focus, and improved productivity."

3.1. The shift from fish oil to algal oil accelerated in Q4

Data & Facts

IFFO's October forecast indicates that global fish oil production in 2026 will decline by 15% year-on-year, marking its lowest level since 2016. The oil yield from Peruvian anchoveta has dropped from the typical 3%–4% range to approximately 2.7%.

Meanwhile, the FOB price for crude fish oil (aquaculture grade) has surged by approximately 220% year-on-year.

Q4 Outlook :

The tipping point at which algal oil shifts from an "alternative option" to a "must-have procurement item" is set to arrive in Q4.

• **Supply stability has become the primary consideration:** algal oil is produced via microbial fermentation and is therefore unaffected by fishing quotas or sea conditions. As the supply of fish oil has shifted from "cyclical fluctuation" to "structural shortage," the procurement strategy for brands has evolved from "seeking the lowest price" to "seeking a reliable source."

• **Domestic production capacity is on the verge of being unleashed:**

Baolingbao's 4,500-ton DHA project is expected to be completed by December 2026, while ST Ningke's 5,000-ton algal oil fatty acid capacity is projected to come online in early 2027. The fourth quarter serves as a critical window for brands to secure supply agreements for algal oil for 2027.

• **The certification cycle required for switching formulations compels**

decision-making: Brands transitioning from fish oil to algal oil must undergo a lengthy re-validation and registration process—a dynamic that ensures high "stickiness" once the substitution is established. Brands that fail to initiate this transition by Q4 may find themselves in a precarious position by 2027, potentially left with no oil supply available for use.

3.2. Magnesium: Category in Decline, Ingredient on the Rise

Data Facts :

In the U.S., the sleep-aid category declined by 3.9% over the year ending in July 2026, while search volume for magnesium supplements grew by 49.2%.

Q4 Outlook:

Magnesium products that lack clear labeling regarding their form and dosage will see a decline in conversion rates during Q4.

- Consumer demand has shifted from a general interest in "sleep-aid supplements" to specific forms like "magnesium glycinate" and "magnesium threonate."
- Discussions on Reddit reveal a blunt critique of "buffered" formulations—dismissed by users as "nothing more than a laxative with a 'magnesium' label." Consumers are effectively "voting with their feet" against magnesium oxide, given its poor absorption rate. Meanwhile, issues regarding the tolerability of magnesium glycinate—such as "heightened anxiety, nightmares, and feeling exhausted yet wired"—are being openly discussed, prompting some users to switch to magnesium malate or magnesium threonate.

3.3. Berberine: The "affordable alternative to GLP-1" narrative is cooling down, but demand is taking root.

Data Insights:

Interest in the weight management category has declined by 7.4%, while searches for berberine have surged by 66.4%.

Q4 Outlook:

Berberine is not going away, but the narrative of it being an "Ozempic alternative" will lose further traction in Q4.

- Discussions on Reddit have shifted from the concept of "Nature's Ozempic" toward more cautious concerns: gastrointestinal tolerability, the risk of hypoglycemia, and potential interactions with medications such as levothyroxine and sertraline.
- In response to market demand, the products that have truly gained a lasting foothold are those positioned with a serious focus on "blood glucose management and metabolic support."

3.4. L-Theanine: A Growth Champion Overshadowed by the Radiance of Magnesium

Q4 Outlook:

The value of L-theanine lies in its natural pairing with caffeine. In Q4, we expect to see L-theanine increasingly incorporated as a standard ingredient—rather than a standalone selling point—within the "functional coffee" and "focus-enhancing beverage" categories.

Search interest in L-theanine has grown by 148.8%—far outpacing the 49.2% growth seen for magnesium—yet it hasn't generated the same level of buzz. The reason may be that the "feeling" provided by L-theanine is somewhat subtle: it doesn't make you drowsy, nor does it give you a high; it simply takes the edge off caffeine, making it less jittery.



4.1. Gummies: Growth persists, but "dosage credibility" emerges as a dividing line

Q4 Outlook:

A "stratification" will begin to emerge among gummy manufacturers in Q4; the competitive landscape for dosage-form innovation is shifting from a focus on "existence" (whether a product exists) to "stability" (how reliable and consistent it is).

FDA Warning Signs:

The FDA's concerns regarding the complexities of precise formulation and testing in gummy production—compounded by consumer skepticism about whether these products actually contain effective doses—present brands with a choice: **either invest in verifiable dosage transparency or accept a downgrade in market positioning to that of a mere "snack."**

Tier 1: Manufacturers capable of providing comprehensive dosage verification data, stability test reports, and microbial control protocols. Clients are willing to pay a premium for "compliance certainty."

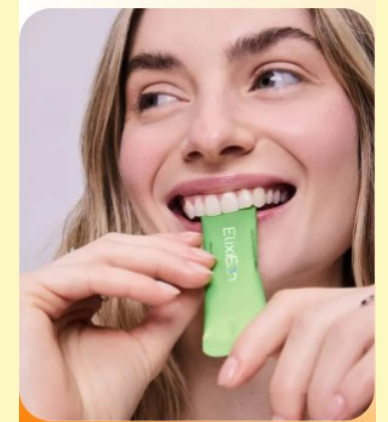
Tier 2: Manufacturers that can produce gummies but are unable to provide systematic quality control documentation. While orders for Q4 may remain unaffected, there is a high risk of client attrition once platform audits become more stringent in 2027.

4.2. Powders: Fastest growth, yet the driving force lies elsewhere—not in "supplements."

- Vitaquest's autumn trend report identifies effervescent tablets, chewables, and powdered drink mixes as key formats for "enhancing convenience and user experience."
- Powdered supplements represent the fastest-growing format (within the dietary supplement category), with a compound annual growth rate (CAGR) of 8.83%. This growth is driven by sports nutrition and customizable nutrition—consumers increasingly want to incorporate supplements into their smoothies, coffee, or water. Consequently, the primary competition for powdered supplements is not capsules, but rather protein powders and meal replacements.

Q4 Outlook:

The winners in the powdered supplement category will not be "supplement brands that happen to offer powders," but rather brands that position powdered formats as the go-to solution for daily nutrition.



Consumers: The Semantic War Over Nutrient Density

Data & Facts:

Innova identifies "nutrient density" as the top trend for 2027, centered on the core question: "What does this food do for me?"

Q4 Outlook:

Claims featuring a "protein + fiber" combination are set to increase; however, true differentiation lies not in simply having high values for both, but in whether their sources are transparent and easily understood.

- The term "nutrient density" is being misused. High-protein cookies may highlight their protein content in grams while simultaneously containing high levels of added sugars and saturated fats. The "health halo" effect leads consumers to use protein figures as a proxy for overall nutritional quality.

- Fiber is emerging as a "corrective" to the protein trend. Whole Foods has identified a "focus on fiber" as one of its key trends for 2026, with ingredients such as prebiotic fibers, chicory root, and resistant starch appearing with increasing frequency on product packaging.

Q4 is a watershed moment for cross-border business

Key Facts:

The draft revision of the **Food Safety Law**, released by China on October 10 for public comment, represents the most significant legislative overhaul since 2015. United States: Mandatory GRAS (Generally Recognized as Safe) requirements and quality control for gummy products.

CHINA

- The **"domestic entity" provision in the draft revision** of the Food Safety Law makes Q4 a critical window for cross-border brands to redesign their legal structure in China. **Three changes directly relevant to nutritional supplements: the primary responsibility of cross-border e-commerce entities; full-chain accountability for live-streamed product sales; and stricter regulations on labeling and promotional claims.**
- **Traceability QR code for health food:** The National Food Inspection Center is developing a QR code-based traceability system for health foods, designed to provide consumers with information on product and ingredient origins, as well as educational content. Since any health claims must remain within legally permitted parameters and be supported by scientific evidence, these QR codes will serve as a medium for conveying that "scientific basis."

The FDA has proposed shifting the voluntary GRAS (Generally Recognized as Safe) notification process to a mandatory one. Meanwhile, quality control issues in the production of gummy supplements have been formally raised. The fourth quarter marks a period in the U.S. market where "compliance costs" are becoming increasingly explicit.

USA

The "compliance-driven shakeout" in the Chinese market has entered its second half.

Signals from Q3:

The health supplement industry is currently in a phase where expanding demand and a shakeout on the supply side are coinciding. Leading domestic brands—characterized by strong R&D capabilities and compliant marketing practices—as well as established, licensed cross-border players, are well-positioned to capture an even larger share of the market.

Q4 Outlook:

The theme for the Chinese market in Q4 is "the latter stage of compliance-driven consolidation"—shifting from the clearing of distribution channels to the streamlining of supply chains.

- Following the "Usii" incident in April 2026, the platform's onboarding review process has been tightened.
- A key development in Q4 stems from the draft revisions to the *Food Safety Law*: once the requirement for "domestic service providers to assume primary legal responsibility" is codified, brands relying on an "offshore shell company + domestic contract manufacturing" model will no longer have any room to operate in compliance with the law.
- **For service providers with domestic compliance capabilities and manufacturing entities, the fourth quarter represents a window of opportunity to capture "compliance-driven migration demand"**—as contract manufacturing capacity previously dedicated to non-compliant brands is now seeking new, compliant partners.

8.1 Trend changes are not cause for anxiety, but rather a perfect match between skill set and ability structure.

The disruption in fish oil supplies is compelling a restructuring of supply chains; revisions to the Food Safety Law are forcing a reconfiguration of compliance frameworks; and the stringent precision requirements for gummy supplements are driving a stratification of manufacturing capabilities. These three shifts point to a single conclusion: the margin for "good enough" will shrink drastically after the fourth quarter.

8.2 The reliability of dosage in gummy products will emerge as a topic of discussion at the category level in Q4.

FDA warnings and stricter labeling requirements under food safety laws point in the same direction: compliance documentation for gummy products—covering dosage verification, stability, and microbial control—is no longer just an "added-value service," but a "baseline delivery requirement." Starting in Q4, we will integrate a comprehensive compliance documentation package into our standard gummy product solutions, rather than treating it as an afterthought. This serves both as a risk-mitigation measure and a key point of differentiation.

8.3 Prepare a "Transition Plan for Principal Responsibility" for cross-border clients.

A core change in the draft revisions to the *Food Safety Law* concerns the primary responsibilities of domestic service providers. When engaging with cross-border brands in Q4, it is advisable to present a concise, pre-prepared "Explanation of the Transition of Primary Responsibilities"—a document that clearly defines the boundaries of liability and the safeguard mechanisms for domestic manufacturers and compliance service providers following the legal amendments. While not a formal legal document, it serves to establish trust from the outset.

8.4 Ingredient search trends are a form of product strategy embedded in advance.

The essence of ingredient-based searching is that consumers are effectively defining products on behalf of brands. Consequently, incorporating "search-friendly" ingredient combinations during the formulation design stage allows for proactive participation in shaping product strategy.

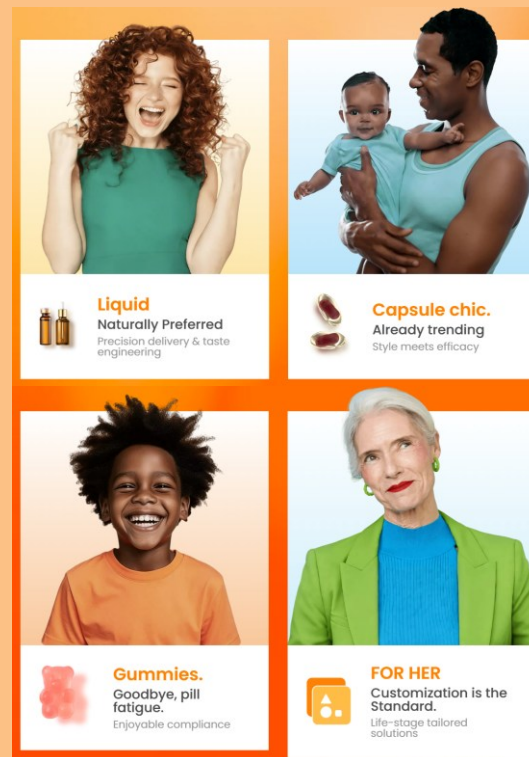
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