

# The Private Label *AI Advantage*

*Supplements — the one consumer category where trust still beats value in the AI answer.*

**Published**      **Brands modeled**  
May 2026      25

**Answer engines**  
ChatGPT · Claude · Perplexity · Gemini · Google AI Overviews

**Research by**  
5W AI Communications

**34** vs 30

CITATION SHARE –  
NATIONAL & D2C  
BRANDS VS STORE  
BRANDS

**3-3**

SUB-CATEGORY  
SPLIT – THE  
MOST BALANCED  
IN THE  
FRANCHISE

**#1**

KIRKLAND STILL  
TOPS THE INDEX  
– THE LONE  
STORE-BRAND  
EXCEPTION

**64**

CONSUMER-INTENT  
PROMPTS TESTED  
ACROSS FIVE  
ANSWER ENGINES

## 01 Executive Summary

**T**he supplements category breaks the franchise pattern — gently, but unmistakably.

5W modeled the Citation Share of 25 vitamin and supplement brands: 12 store-brand lines against 13 national and direct-to-consumer brands, across five answer engines and 64 consumer-intent prompts. **Store brands earned an average Citation Share of 30. National and D2C brands earned 34.**

This is the only consumer category 5W has modeled where the store-brand tier does *not* lead. Store brands still win the value prompts — “cheapest multivitamin,” “best budget vitamin D.” But they lose the prompts that define the category: “best,” “most trusted,” “third-party tested,” “best for women.”

In supplements, the buyer’s core anxiety is not price. It is *does this work, and is it safe* — and answer engines route that anxiety toward brands with verification credentials and clinical credibility.

Supplements moved to the answer layer in a category with no FDA pre-approval — which changes what answer engines reward.

#### THE LEGACY MODEL

- ◆ Shelf placement
- ◆ Retail distribution
- ◆ Mass advertising
- ◆ Search rankings
- ◆ Price

#### THE ANSWER-ENGINE MODEL

- ◆ Retrieval authority
- ◆ Third-party verification signals
- ◆ Clinical & expert content
- ◆ Trust density
- ◆ Answer-layer visibility

## 02 The Headline Finding

Supplements are unregulated in a way OTC medicine is not. There is no pre-approval, no guaranteed active-ingredient equivalence, and a steady stream of news about products that under-deliver or mislabel. That environment makes the buyer's central question *trust*, not price.

Ask an answer engine “cheapest multivitamin” and it surfaces Kirkland, Spring Valley, Up & Up — the value win still happens. But ask “best multivitamin” or “most trusted supplement brand,” and the answer pivots to brands with verification marks, clinical positioning, or doctor-founded credibility: **Nature Made, Thorne, Ritual.**

*When a category runs on trust, value loses the answer.*

THE SUPPLEMENTS INVERSION, IN ONE LINE

The franchise thesis inverts here for a precise reason: value clarity, one of the answer engines' four rewards, is outweighed by a trust deficit the store brands have not closed.

## 03 Methodology

Franchise-standard. 25 supplement brands — 12 store-brand lines, 13 national and D2C — scored across five answer engines on 64 consumer-intent prompts spanning six sub-categories. Prompts mirror real shopper language, with no brand names seeded.

**Citation Share** is a directional visibility model measuring how frequently brands, retailers, and experts appear across AI-generated answers inside ChatGPT, Claude, Gemini, Perplexity, and Google AI Overviews. Scores are indexed 0–100, estimated from current answer-engine behavior and the structure and density of the open-web content each brand can be surfaced from. It is a model of the retrieval landscape — not a logged-query count, which is unstable and easily gamed.

### Example prompts tested

<p>EVERYDAY MULTIVITAMINS</p> <p><i>“Best multivitamin”</i></p>	<p>SINGLE VITAMINS &amp; MINERALS</p> <p><i>“Cheapest vitamin D supplement”</i></p>
<p>WOMEN’S &amp; PRENATAL</p> <p><i>“Best prenatal vitamin”</i></p>	<p>SPORTS &amp; PROTEIN</p> <p><i>“Best protein powder”</i></p>
<p>SPECIALTY &amp; FUNCTIONAL</p> <p><i>“Best third-party tested vitamins”</i></p>	<p>VALUE &amp; BUDGET</p> <p><i>“Are store-brand vitamins good”</i></p>

## 04 The Citation Share Index

Modeled Citation Share across all five answer engines. Click any column header to sort.

RANK ▲	BRAND ↓	TIER ↓	CITATION SHARE ↓
01	<b>Kirkland Signature</b> Costco	STORE BRAND	52
02	<b>Nature Made</b>	NATIONAL & D2C	49
03	<b>Thorne</b>	NATIONAL & D2C	44
04	<b>Ritual</b> D2C	NATIONAL & D2C	42
05	<b>Spring Valley</b> Walmart	STORE BRAND	41
06	<b>Nature's Bounty</b>	NATIONAL & D2C	38
07	<b>Amazon Elements</b>	STORE BRAND	36
08	<b>Garden of Life</b>	NATIONAL & D2C	36
09	<b>NOW Foods</b>	NATIONAL & D2C	35
10	<b>Up &amp; Up</b> Target	STORE BRAND	34
11	<b>365 by Whole Foods Market</b>	STORE BRAND	33
12	<b>Centrum</b>	NATIONAL & D2C	33
13	<b>CVS Health</b>	STORE BRAND	31
14	<b>One A Day</b>	NATIONAL & D2C	31

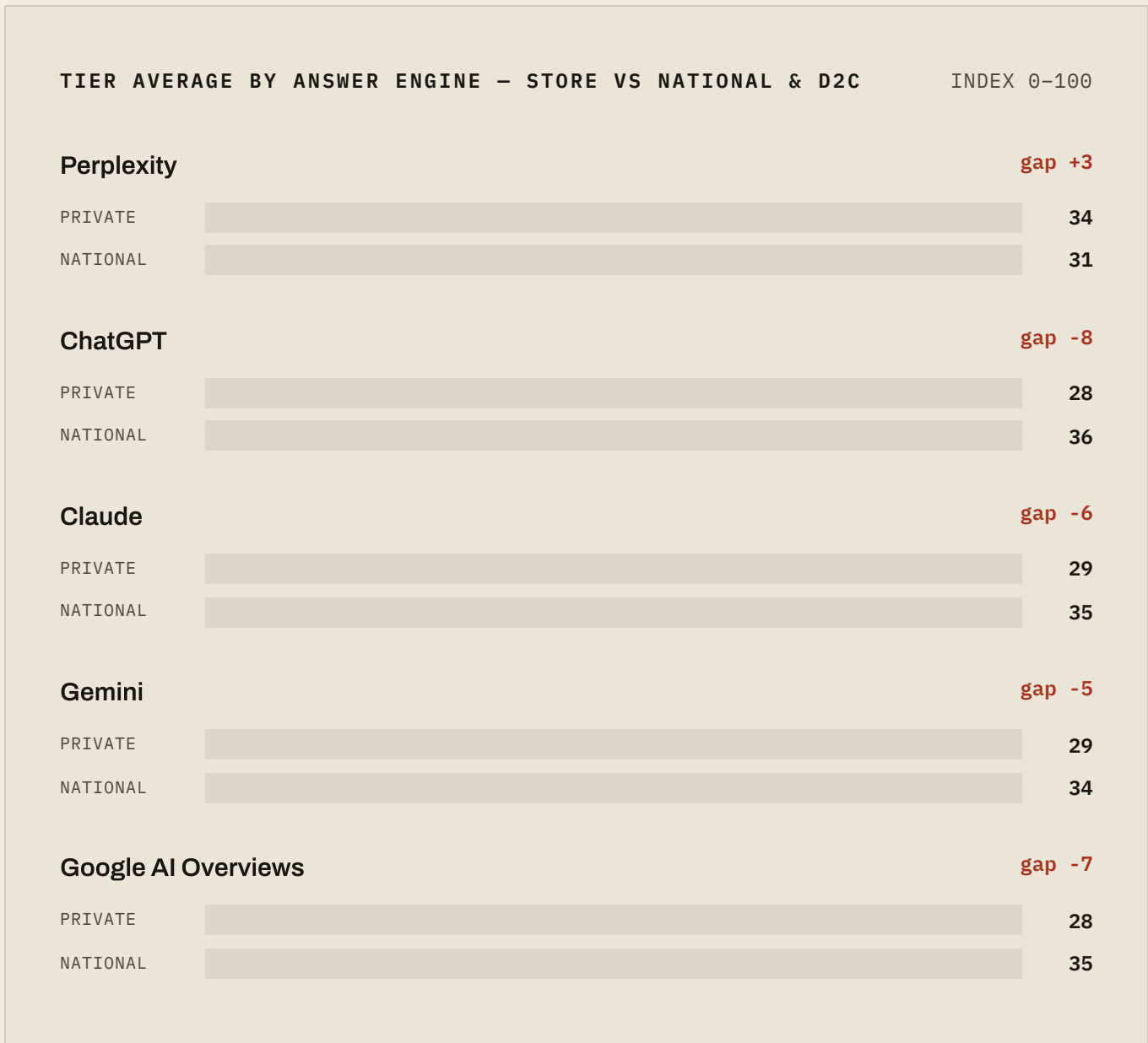
RANK ▲	BRAND ↓	TIER ↓	CITATION SHARE ↓
15	<b>Perelel</b> D2C	NATIONAL & D2C	30
16	<b>Equate</b> Walmart	STORE BRAND	28
17	<b>Olly</b>	NATIONAL & D2C	28
18	<b>Member's Mark</b> Sam's Club	STORE BRAND	26
19	<b>O Positiv</b> D2C	NATIONAL & D2C	26
20	<b>MaryRuth's</b>	NATIONAL & D2C	24
21	<b>Nature's Truth</b>	STORE BRAND	23
22	<b>Optimum Nutrition</b>	NATIONAL & D2C	22
23	<b>Berkley Jensen</b> BJ's	STORE BRAND	20
24	<b>Open Nature</b> Albertsons	STORE BRAND	17
25	<b>Simple Truth</b> Kroger	STORE BRAND	15
TIER AVERAGES			PL 30 · NAT 34

**FIGURE 1.** Tier averages: store brands 30 · national & D2C brands 34 – the franchise's only inversion. Bar length scaled to score.

Kirkland leads the index — the Costco halo is strong enough to top even this category — but it is the only store brand in the top four, and the store-brand tier as a whole sits below the national field.

## 05 Platform by Platform

The inversion is mild and consistent — and the community-heavy engine is the one kindest to store brands.

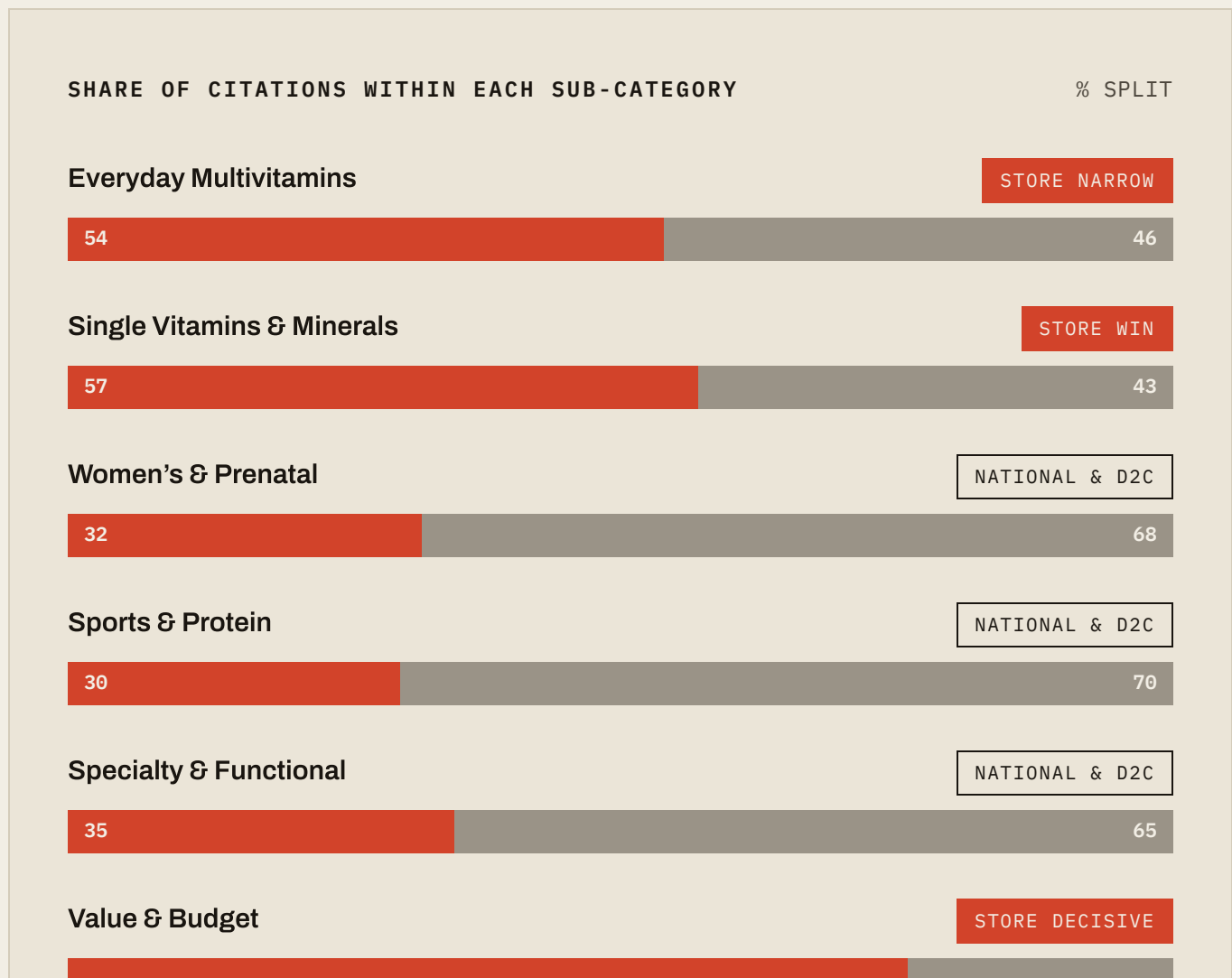


**FIGURE 2.** Tier average by answer engine. The wider the community-content reliance, the wider the gap.

National and D2C brands lead on **ChatGPT, Claude, Gemini, and Google AI Overviews**, where trust-signal and clinical content weighs heavily. **Perplexity** is the one engine where store brands edge ahead — its community-content reliance surfaces Reddit’s heavy “Kirkland vitamins are fine, save your money” sentiment. The franchise pattern is inverted: here, the community-heavy engine is kindest to store brands, while the others reward credentialed trust.

## 06 Sub-Category Analysis

Split down the middle — the most balanced sub-category result in the franchise.



■ Private / store / own brands   ■ National & D2C brands

**FIGURE 3.** Where the advantage holds – and where it does not.

Store brands win **Value & Budget** decisively and the two everyday-vitamin sub-categories narrowly. National and D2C brands win **Women’s & Prenatal** (clinical credibility is decisive — Ritual, Perlele, Nature Made), **Sports & Protein** (Optimum Nutrition and specialists own it), and **Specialty & Functional** (where “clinically studied” content rules). Three sub-categories each.

## 07 Why AI Recommends These Brands

Answer engines recommend the supplement brands the open web most credibly endorses — and in this category, credibility means documented trust, not low price:

01

### Reddit & community density

The store brands’ best input. Forums tell shoppers “Kirkland fish oil is third-party tested and cheap, just buy that.”

02

### Editorial coverage

Leans national. Health journalism and “best supplement” roundups favor verified and clinically positioned brands.

03

### Review ecosystems

Mixed. Store-brand basics review well; specialty and women’s prompts pull toward branded products.

04

### Expert & clinical mentions

Decisive against store brands. “Doctor-recommended” and practitioner content names Thorne, Nature Made, and the D2C brands.

05

### Verification & testing coverage

The category’s defining input. USP and NSF marks, third-party-testing references — content store-brand lines have largely not built.

06

### Retailer authority / halo

Real but limited. It transfers general trust, not clinical trust — enough to lift Kirkland, not enough for most store-brand lines.

The six inputs split. Community favors store brands; everything credentialed — expert mention, verification coverage, editorial — favors national and D2C brands. Verification trust is the category’s defining input, and store-brand supplement lines have competed on price instead of building it. In an unregulated, safety-anxious category, answer engines weight documented trust above value.

## Which sources shape the answer

The source mix behind a supplement recommendation tilts toward credentialed and verification content — which is why this category resists the private-label pattern.

#### GROUNDING SOURCES BY INFLUENCE ON ANSWER-ENGINE RECOMMENDATIONS

INFLUENCE INDEX 0-100

**Expert & health publications** 82



“Doctor-recommended” and practitioner content names Thorne, Nature Made, and the D2C brands.

**Verification & testing content** 78



USP and NSF references and third-party-testing coverage — the category’s defining input, and one store brands rarely build.

**Reddit & community forums** 76



The store brands’ best source — forums tell shoppers “Kirkland is third-party tested and cheap, just buy that.”

**YouTube & video** 66



Supplement-review culture is large and influential, skewing to branded and D2C products.

**Editorial & health publishers** **60**

“Best supplement” roundups favor verified and clinically positioned brands.

**Independent reviews & review sites** **54**

Store-brand basics review well; specialty prompts pull toward branded products.

**Retailer pages & FAQs** **42**

Lower weight; supplement buyers seek third-party validation, not retailer claims.

**FIGURE 4.** The source types conversational retrieval leans on most when recommending brands in this category – the grounding layer beneath every answer.

## 08 Who’s Losing — and Why

The “losers” here are the store brands — not in absolute terms, but relative to the franchise. **Simple Truth, Open Nature, Berkley Jensen** sit at the bottom: store-brand supplement lines from retailers whose halos are real but not strong enough to carry clinical trust, with no verification-signal content of their own.

The winners cluster around credibility, not price — Nature Made on USP verification, Thorne on practitioner credibility, Ritual on radical-transparency D2C positioning. They did, in supplements, what store brands did in grocery: built the content footprint the category’s defining question rewards. The footprint is just made of trust signals instead of cult fandom.

## 09 The Structural Explanation

Across the franchise, answer engines reward simplicity, trust density, content recency, and value clarity. Supplements is the category where **value clarity and trust density point at different brands** — store brands have the value, national and D2C brands have the documented trust — and in an unregulated, safety-anxious category, engines weight trust above value.

The thesis does not fail here. It resolves correctly: the architecture match still wins, but in supplements the architecture that matters is a *trust* architecture, and the store brands have not built it.

*Visibility is shifting from placement to retrieval — and retrieval, in this category, rewards proof over price.*

THE STRUCTURAL READ

### Legacy advantage vs AI-era advantage

The shift is not cosmetic. It is a change in which assets generate visibility.

LEGACY ADVANTAGE	AI-ERA ADVANTAGE
Shelf placement	Retrieval authority
Advertising spend	Recommendation frequency
Brand recognition	Trust density
Retail distribution	Community discussion

Search-engine ranking

Answer-layer visibility

## 10 The Retailer Halo — and Its Limit



### The Retailer Halo Effect — and Where It Stops

A retailer halo transfers general trust — “this retailer sells decent products.” It does not transfer clinical trust — “this product is third-party tested.” Where the category demands the second, a halo reaches mid-table, not the top.

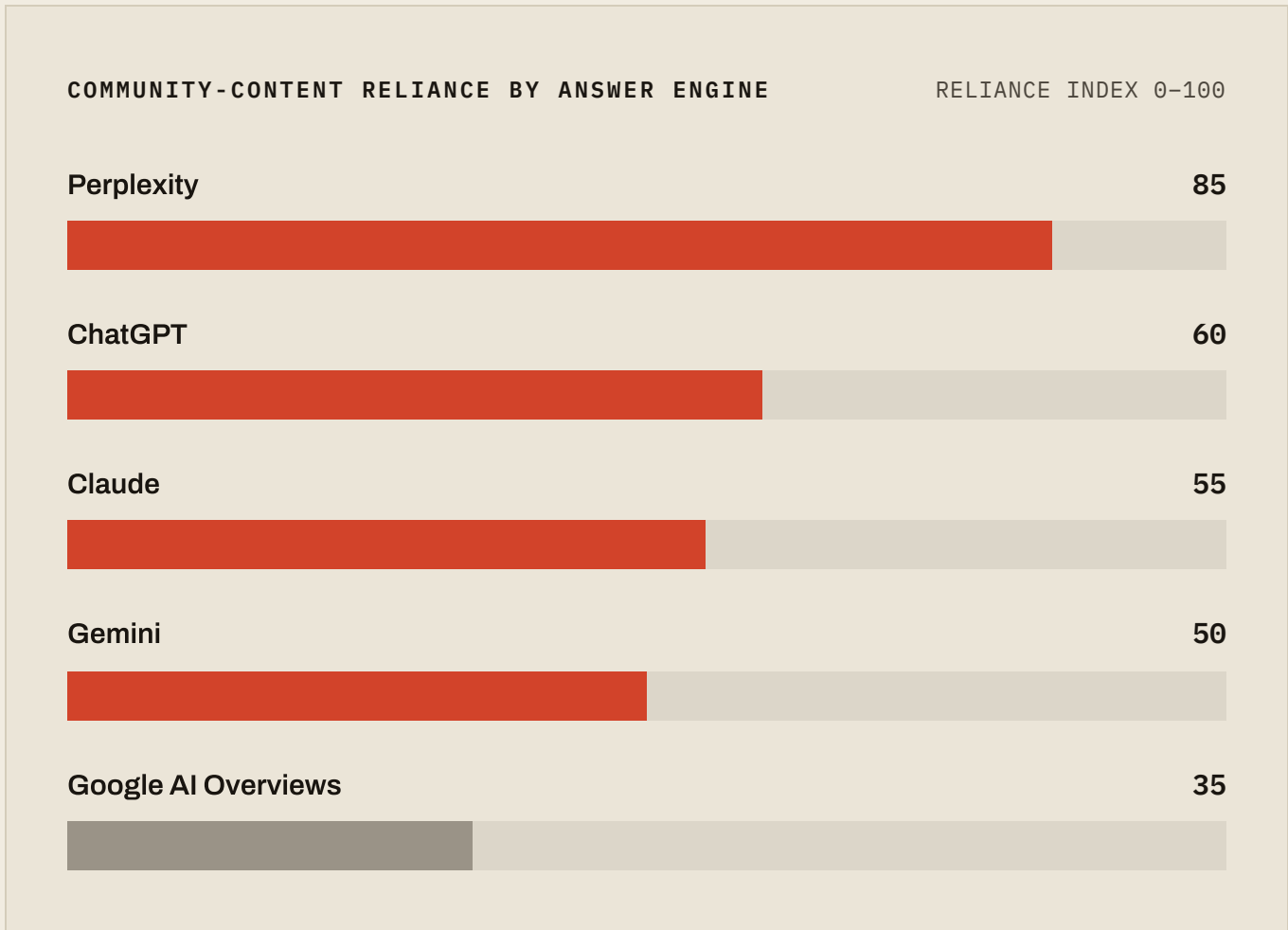
The halo still operates: **Kirkland at #1** is the Costco halo carrying a store-brand supplement to the top of the index, and **365** holds respectably on the Whole Foods halo. But supplements marks the halo’s limit. It transfers general trust, not clinical trust. Where a category demands proof of safety and efficacy, a halo gets a store brand to mid-table — Kirkland clears the bar on Costco’s exceptional reputation; most store-brand supplement lines do not.

## 11 The Community Factor

Community sentiment is the store brands’ best friend here — Reddit and supplement forums are full of “Kirkland fish oil is third-party tested and cheap, just buy that” advice, and that lifts store brands on Perplexity specifically. But the broader content environment —

health journalism, expert explainers, testing-organization coverage — leans toward credentialed brands.

The split between a pro-store-brand community layer and a pro-credentialed-brand expert layer is exactly why the category lands near-even rather than decisively either way.



**FIGURE 5.** The systems that lean hardest on community and review content are the ones that move citation share the most.

*The community says save your money. The expert layer says check the testing. The expert layer wins the answer.*

THE COMMUNITY FACTOR

## 12 **Winners**

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### **Kirkland Signature**

Citation Share 52 · #1

Proof the Costco halo travels even into a trust-driven category — well-reviewed, third-party-tested, relentlessly recommended on value-plus-quality grounds.

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### **Nature Made**

Citation Share 49 · #2

USP verification plus pharmacist familiarity — the trust-signal incumbent.

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### **Thorne & Ritual**

Citation Share 44 / 42

Clinical credibility and radical transparency respectively — the brands that built a retrievable trust footprint.

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## 13 **Losers**

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### **Simple Truth**

Citation Share 15 · #25

A store-brand supplement line from a retailer whose halo is real but not strong enough to carry clinical trust.

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### **Open Nature**

Citation Share 17 · #24

Competent products, no verification-signal content of their own — invisible to a trust-driven query.

Club-store supplement line with value clarity and no documented-trust footprint.

Common thread: store-brand supplement lines competed on price in a category whose defining question is trust. The franchise advantage requires the trust architecture — and most have not built it.

## 14 The Commercial Stakes

Supplements is a large, fast-growing, high-margin category — and the one where store brands cannot assume AI search will hand them share. For store-brand supplement lines, the path to Citation Share is not lower prices; it is **building and documenting trust** — third-party testing, verification marks, transparent sourcing — and making that content retrievable.

For national and D2C brands, supplements is the franchise's reassurance: a category where a well-built trust footprint still beats a cheaper alternative in the answer. It is also a warning — Kirkland at #1 shows a store brand *can* break through when the trust signals are real.

## 15 The GEO Playbook

In supplements, the playbook is the same for everyone: compete on documented trust, not price.

- 1 **For store brands, compete on trust, not price.** Pursue USP/NSF verification, publish third-party testing, document sourcing — and make all of it dense and retrievable.

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- 2 **For national and D2C brands, defend the trust footprint.** Keep verification, clinical, and transparency content current and authoritative. It is the moat.

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- 3 **Own a category claim an answer engine can interpret clearly.** Ritual owns transparency; Thorne owns clinical credibility. Diffuse brands lose.

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- 4 **Measure value prompts and trust prompts separately.** “Cheapest” and “most trusted” have different winners; a blended average hides the strategy.

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- 5 **Track Citation Share on a fixed cadence.** In the franchise’s most contested category, the standings move — watch them.

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The principle underneath all five: **build the infrastructure before the crisis — not during it.**

## 16 Limitations & Outlook

**Limitations.** Directional model, May 2026. Scores measure AI visibility, not product quality, safety, or efficacy — nothing here is health or supplement advice, and supplement quality genuinely varies. Brand set is 25 of the most relevant supplement brands; category framing materially affects results — a sports-nutrition-specific study would re-rank several brands.

**Outlook.** Store brands can close the gap, but only by building trust signals rather than cutting prices. Supplements is the franchise’s boundary case — the category that defines exactly where the private label AI advantage stops.

# Glossary

## ▶ Citation Share

The modeled frequency with which a brand appears across AI-generated answers for a defined set of buyer questions. Indexed 0–100; the answer-engine equivalent of share of voice.

## ▶ Answer-Layer Visibility

A brand's presence inside the AI-generated answer a buyer reads before reaching a shelf or a search result — the competitive surface that now precedes market share.

## ▶ Retrieval Authority

The strength and consistency of the open-web signal an answer engine draws on when deciding which brands to surface for a query.

## ▶ Trust Density

The concentration of credible, independent signals — reviews, community discussion, expert mentions, verification — attached to a brand. Answer engines reward it heavily.

## ▶ Recommendation Frequency

How often a brand is actively recommended, not merely mentioned, across answer engines for category-defining prompts.

## ▶ Retailer Halo Effect

The transfer of a retailer's reputation onto its private brand. Answer engines reinforce that inherited trust signal, citing the brand as though the retailer's credibility were its own.

### PART OF A SERIES

This is Part 5 of [The Private Label AI Advantage](#) — a five-part series within the 5W AI Visibility Index, measuring how answer engines cite store brands against national brands across grocery, e-commerce, pet, pharmacy, and supplements. Each study tests one question: which brands AI recommends, and why.

# 5W AI Communications

## About 5W

5W is the AI Communications Firm, building brand authority across the platforms where decisions now happen — ChatGPT, Claude, Perplexity, Gemini, and Google AI Overviews — alongside earned media, digital, and influencer channels. 5W combines public relations, digital marketing, Generative Engine Optimization (GEO), and proprietary AI visibility research to help clients measure and grow their presence in AI-driven buyer research. Founded in 2003, 5W is recognized as a Top U.S. PR Agency by O’Dwyer’s, named Agency of the Year in the American Business Awards®, honored as a 2026 Top Place to Work in Communications by Ragan, and named to Digiday’s WorkLife Employer of the Year list. Learn more at [5wpr.com](https://www.5wpr.com).

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### Sources & Data

US vitamins and dietary supplements market data – industry market research, 2024–2026 · Private-label and D2C supplement performance – category analysis · Verification and consumer-trust data – industry surveys · Private-label market context – Circana & PLMA.

5W AI Visibility Index – Supplements Edition · AI discovery and recommendation intelligence by 5W AI Communications · May 2026 · Citation Share figures are directional models, not logged-query counts.