



hermes consilium



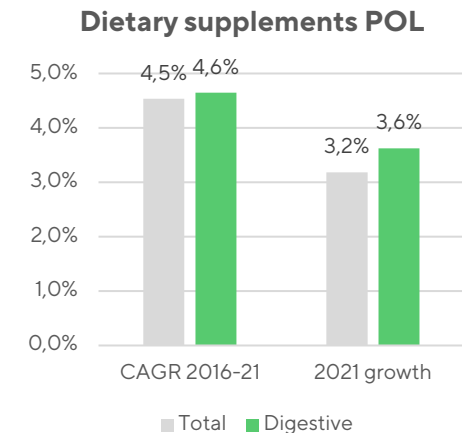
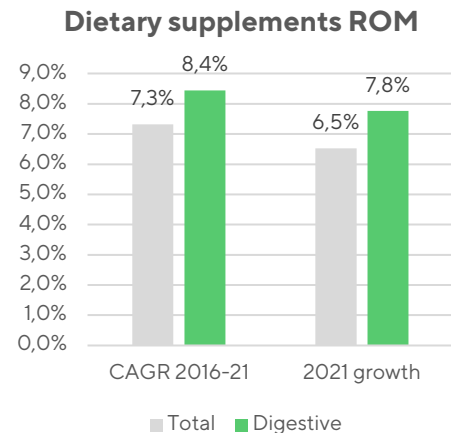
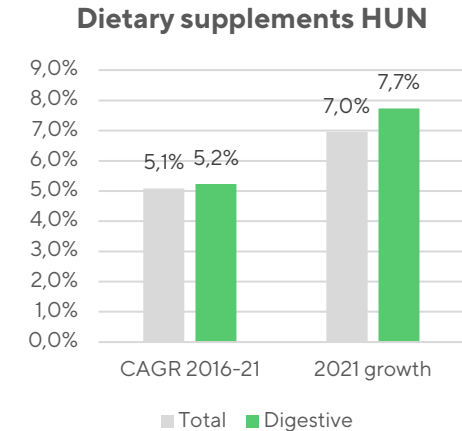
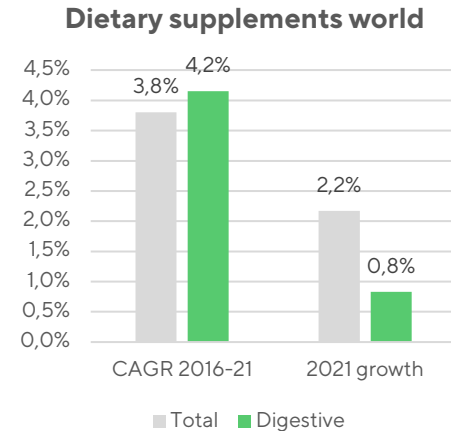
prebiotics.

the next
trend in
digestive health



digestive growth

- **global demand for digestive health dietary supplements** has been growing faster than the total dietary supplement average
- **the same is true for CEE markets** such as Hungary, Romania, and Poland
- **in CEE in 2021, growth remained strong**, while in global markets it decreased below the average

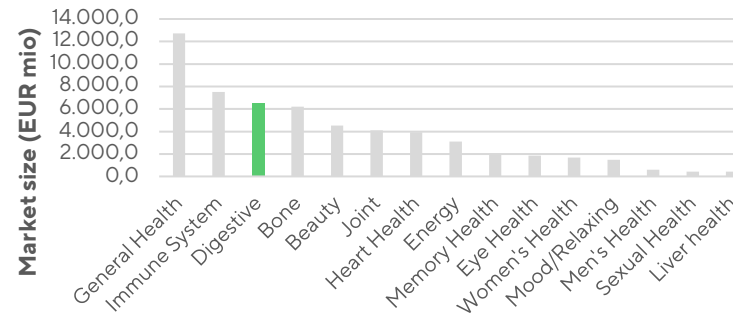


Source: Euromonitor Consumer Health data, February 2022

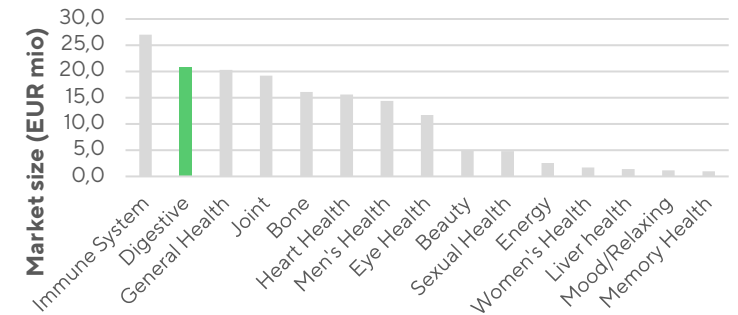
digestive size

- not only is digestive health **growing fast**, but it is also one of the largest dietary supplement market segments globally and across CEE
- the only CEE exception is **Romania**, where digestive health is yet to develop

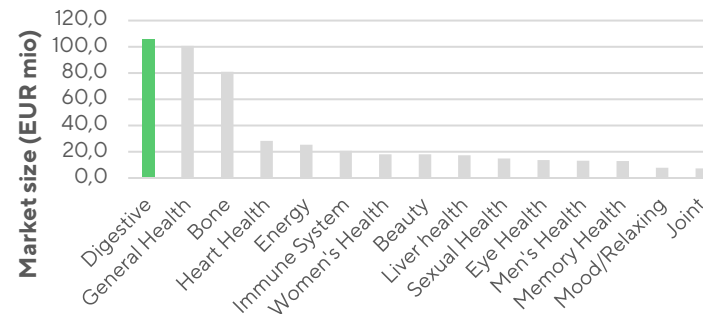
Dietary supplements world 2021



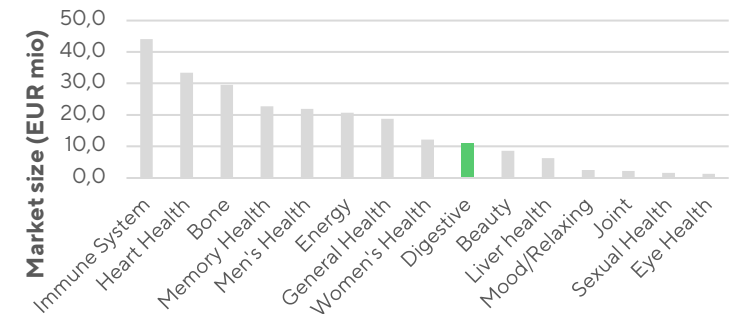
Dietary supplements Hungary 2021



Dietary supplements Poland 2021



Dietary supplements Romania 2021



Source: Euromonitor Consumer Health data, February 2022



probiotics

Probiotics are one of the major categories in digestive health. A developed probiotic segment is a key indicator of consumer awareness of pre/pro/postbiotics.

- **in Poland and Hungary**, probiotics represent an above average share of the total vitamins and dietary supplements (VDS) market, whereas in Romania they are less developed
- **across all three represented CEE markets**, probiotics are projected to grow faster than the total VDS market

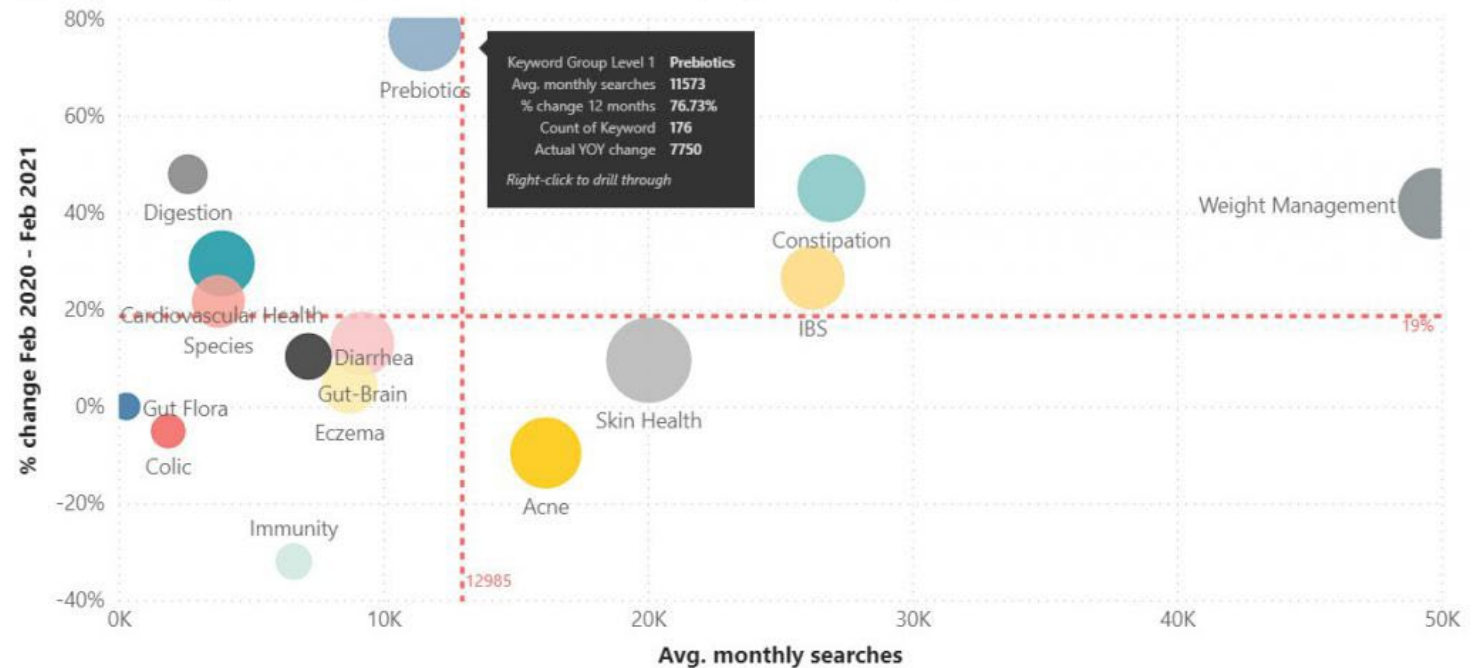
		CAGR 2021-26	Market share
World	Vitamins and Dietary Supplements	4,7%	
	Probiotic Supplements	6,0%	5,5%
Hungary	Vitamins and Dietary Supplements	6,8%	
	Probiotic Supplements	7,5%	8,8%
Poland	Vitamins and Dietary Supplements	6,9%	
	Probiotic Supplements	6,2%	9,4%
Romania	Vitamins and Dietary Supplements	6,6%	
	Probiotic Supplements	8,9%	1,8%

Source: Euromonitor Consumer Health data, February 2022

prebiotic awareness

- although prebiotics are a relatively new concept, consumers are already showing high awareness
- in 2021, consumer demand in form of global English language web searches for prebiotic keywords exploded
- prebiotic keyword searches grew over 76% y-o-y and surpassed well-known terms such as “digestion” or even “immunity”

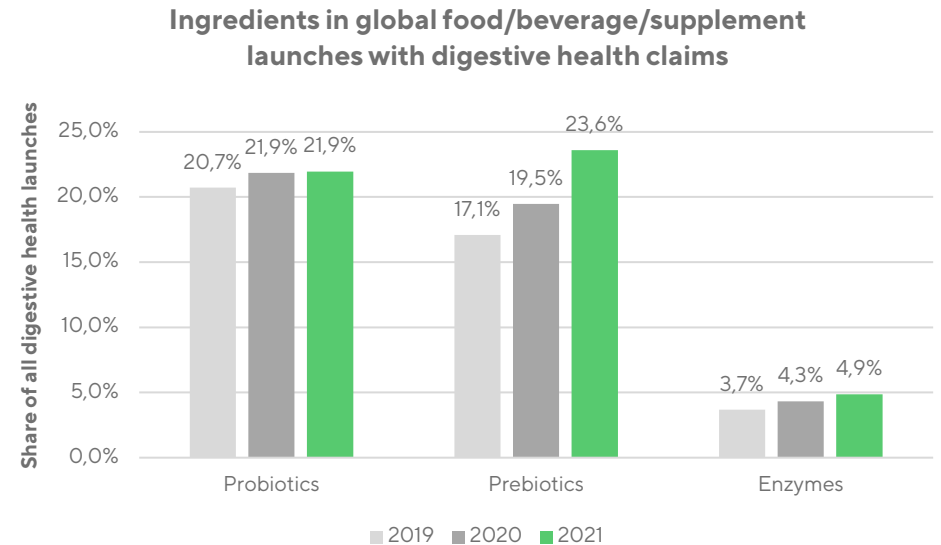
Average monthly searches and % Feb 2020 - Feb 2021, Keyword Group Level 1



Source: Lumina Intelligence, February 2021

formulation trend

- **an analysis** of global new food/beverage/food supplement product launches with digestive health functional claims reveals an interesting formulation trend
- **while probiotics used to be** one of the leading ingredients in digestive health formulations, prebiotics overtook them in 2021
- **with more than 23%** (and rising fast) of digestive health new product launches containing prebiotics, this seems to be the prevailing global trend
- **enzymatic ingredients** are growing at an even faster rate, yet are still a relatively small part of the market – a trend to watch out for



Source: Mintel GNPD, February 2022

launched by leaders

- some of the world's leading and most innovative brands are launching prebiotic or synbiotic products

Why prebiotics?

Formulators are choosing them due to several advantages: shelf-life stability, digestive tract survival, and promoting growth of existing microflora as opposed to introducing outside strains.



Digestive balance
by Country Life USA



Florassist Prebiotic
by Life Extension USA



Triple Action Biotic
by Holland & Barret UK



Pediakid Transit Doux
by Laboratoires Ineldea FRA

Based on the global trends and the current market status in CEE, we believe **prebiotics represent a very promising opportunity.**





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