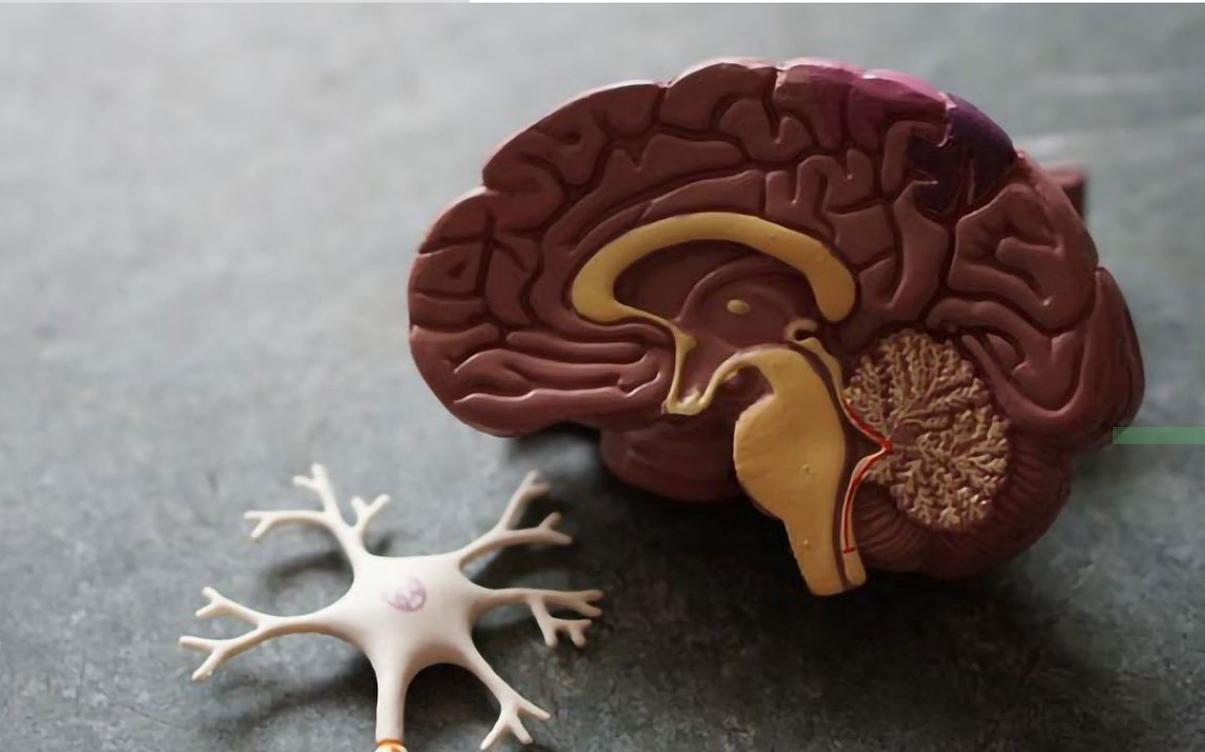


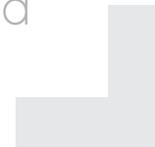


hermes consilium



# cognition.

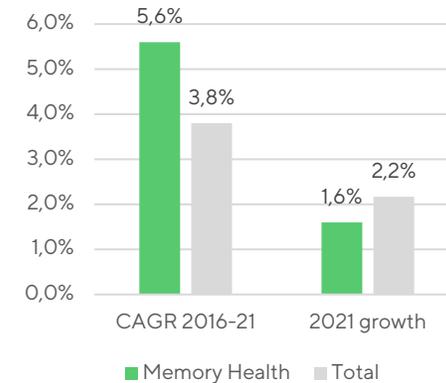
market data on  
a rising trend



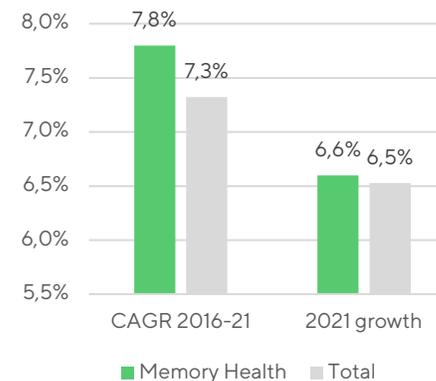
# market growth

- **given the globally aging population** and today's focus on mental performance, we believe nutritional products addressing cognition to present a significant market opportunity
- **global demand for memory health dietary supplements** has been growing faster than the total dietary supplement average in the past 5 years
- **the same is true for CEE markets** such as Romania and Poland
- **in 2021, y-o-y growth slowed** due to a large 2020 increase, but is expected to pick up in the future given consumer concerns

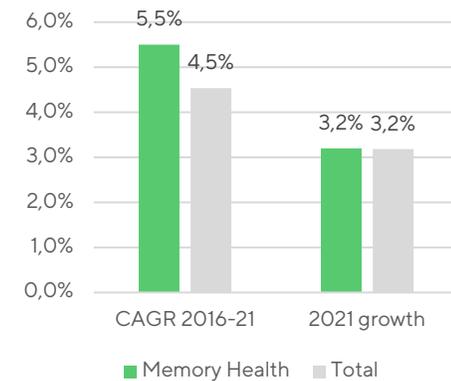
Dietary supplements world



Dietary supplements ROM



Dietary supplements POL

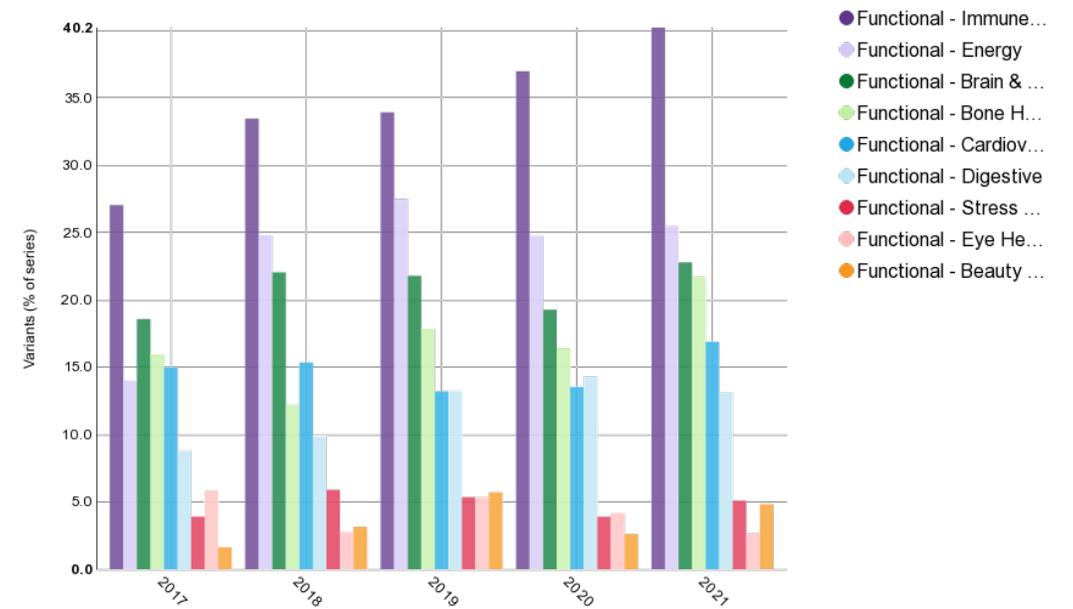


Source: Euromonitor Consumer Health data, May 2022

# product launches

- **brain & nervous system claims** are present in around 20% of supplement launches in the CEE region
- **significant growth was seen recently** – from 19,3% of all launches in 2020 to 22,8% of all launches in 2021

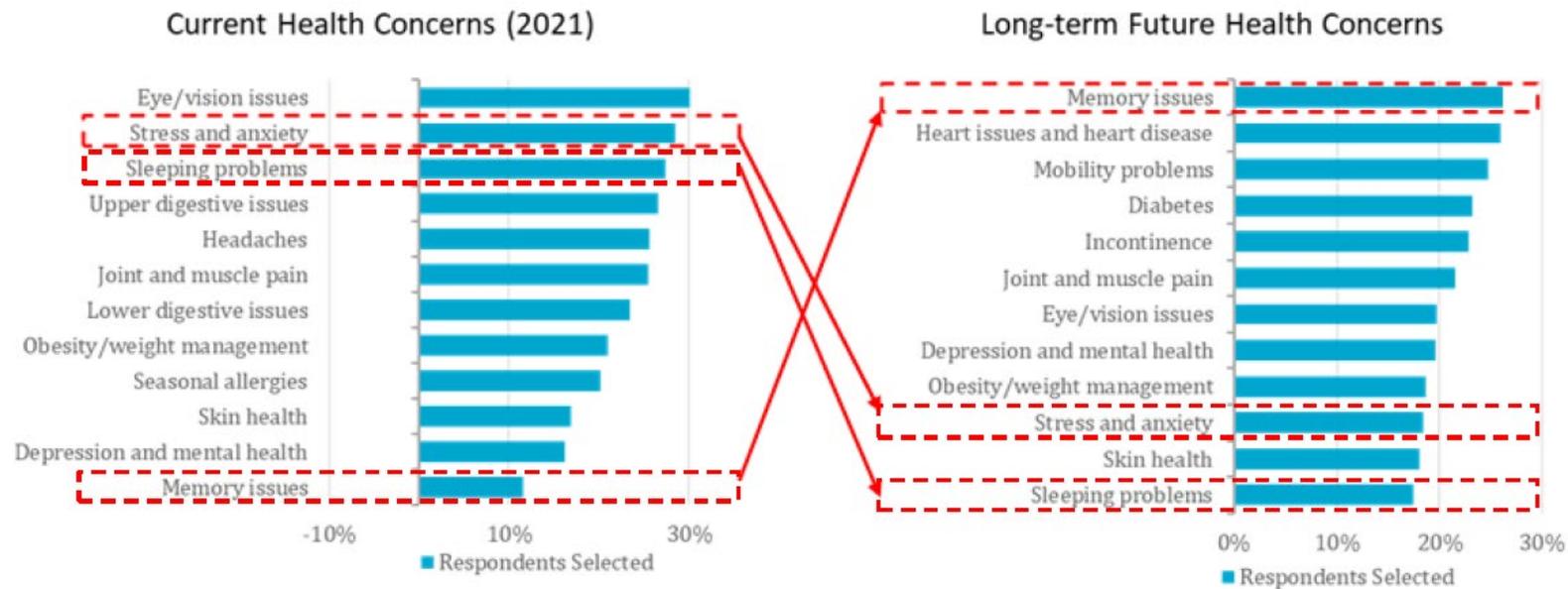
Functional claims in new supplement launches in the CEE region



Source: Mintel GNPD, May 2022

# future trend

- in 2021, global consumers' health concerns centered around stress, anxiety, and sleep
- when asked about the future, consumers selected **memory issues as the number 1 health concern**



Source: Euromonitor Voice of the Consumer: Health & Nutrition Survey, 2021

# launched by leaders

- **some of the world's leading** and most innovative brands are launching cognition products
- many products are based on **branded and clinically studied ingredients**
- **the CEE space** is still populated mostly with price-competitive products based on commodity ginseng, ginkgo, bacopa, and magnesium



Solgar USA  
Based on curcumin and Bacomind®



The Genius Brand USA  
Based on Sensoril® and Neurofactor™



Laboratoires Juva Santé FRA  
Based on ginseng, rhodiola, and Bacomind®



Nature's Bounty USA  
Based on Lutemax 2020

**Based on future trends and the current market status in CEE, we believe **cognition** represents a promising market opportunity.**





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