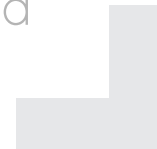




hermes consilium

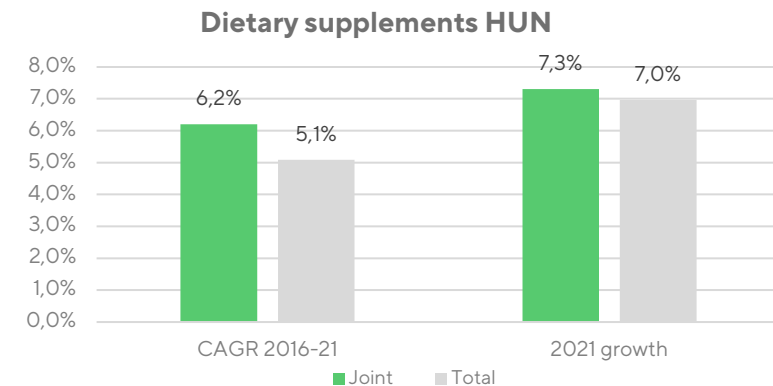
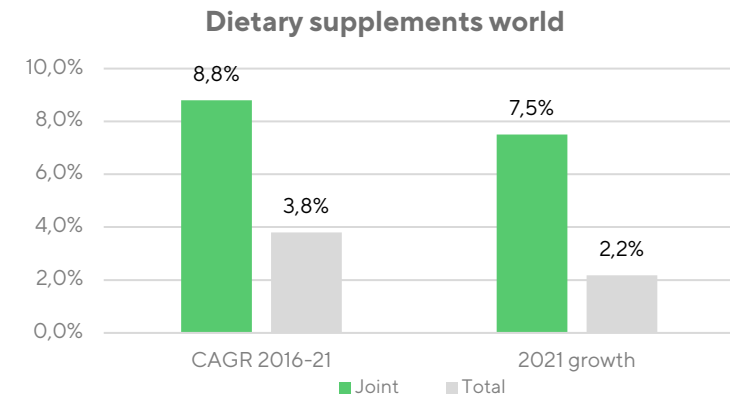
joint health.

market data on
a rising trend



market growth

- **rising obesity and life expectancy** are increasing joint health issue occurrence
- **Google searches increased by 6%** for “joint pain supplements” in 2021 and by 40% in the past 5 years (Google Trends, August 2022)
- **demand for joint health supplements** has been growing faster than the total dietary supplement average in the past 5 years **globally and in the CEE region**
- **worldwide demand for joint health supplements** was over three times larger than the total dietary supplement average in 2021



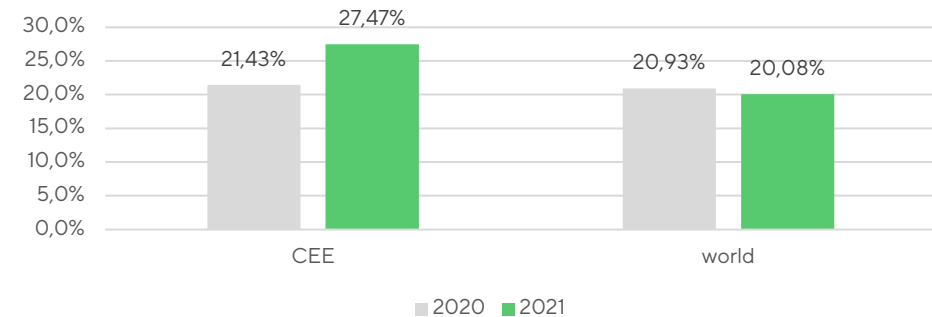
Source: Euromonitor Consumer Health data, August 2022

product launches

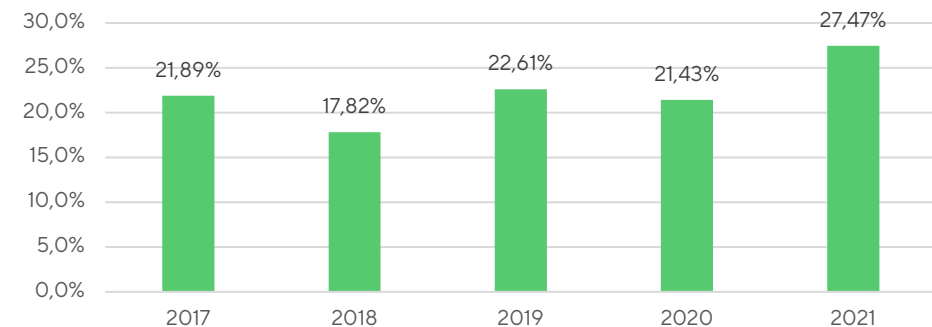
- **bone health functional claim** is present in 20,1% of global new supplement launches and 27,5% of new supplement launches in the CEE region
- **significant growth was seen in the CEE region** – from 21,9% of all new supplement launches in 2017 to 27,5% of all launches in 2021
- **growth was also seen globally** – from 19,3% of all new launches in 2017 to 20,1% of all new launches in 2021
- **bone health functional claim is present** in new product launches by some of the world's leading and most innovative brands (Bayer, Nature Made, NOW Foods)



New supplement launches with functional claim bone health in the CEE region and globally



All new supplement launches with functional claim bone health in CEE region



Source: Mintel GNPD, June 2022



market opportunities

- **Frost & Sullivan** recently published a “Global Bone and Joint Health Ingredients Growth Opportunities” report, which **highlights the opportunity for clinically studied ingredients** in the European market

FROST & SULLIVAN



With increasing number of active and young consumers seeking healthy lifestyle the demand for clinically evaluated bone & joint health ingredients is expected to witness increased penetration in the European market. Ingredients like collagen peptides, vitamin k and curcumin will continue to increase in penetration in line with rising consumer interest in general health and fitness.

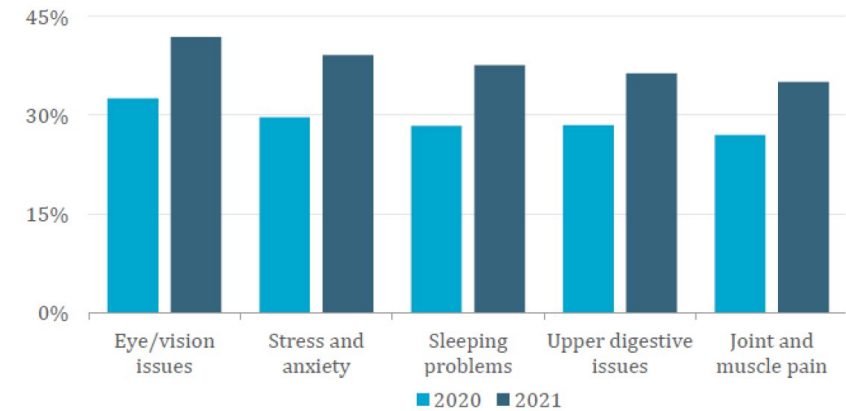


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Industry Analyst - Chemicals, Material & Nutrition

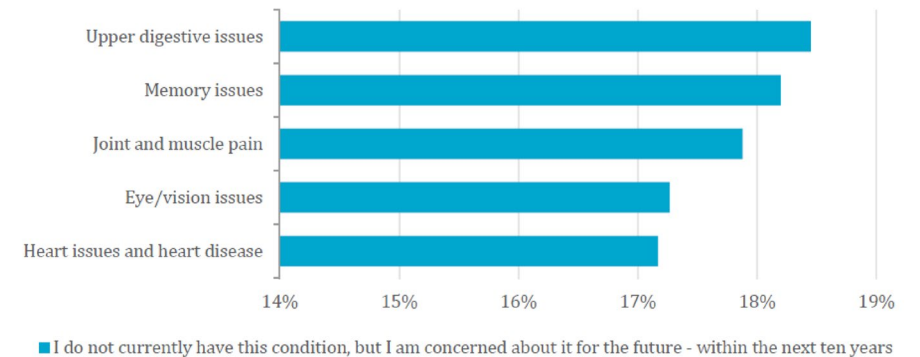
future trend

- joint and muscle pain have been **in the top 5 consumer health concerns** in the past years
- European consumers have placed joint and muscle pain **in the top 3 health concerns for the next 10 years**, stating they don't currently suffer from this condition but are concerned about it in the future
- the **relationship between the gut and bones** has received increased attention recently (Mintel's Patent insights: bone/joint health in food and drink, March 2022)
 - **brands are exploring and launching** a broad range of products beneficial to gut microbiota that promotes bone health

Current Health Concerns 2020/2021



Top Health Concerns for European Consumers for the Next 10 Years



Source: Euromonitor International's Health & Nation Survey, 2020, 2021

Consumer health concerns for the future alongside recent global and CEE market trends indicate **joint health products may present a promising market opportunity in the years to come.**





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