

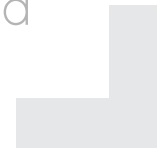


hermes consilium



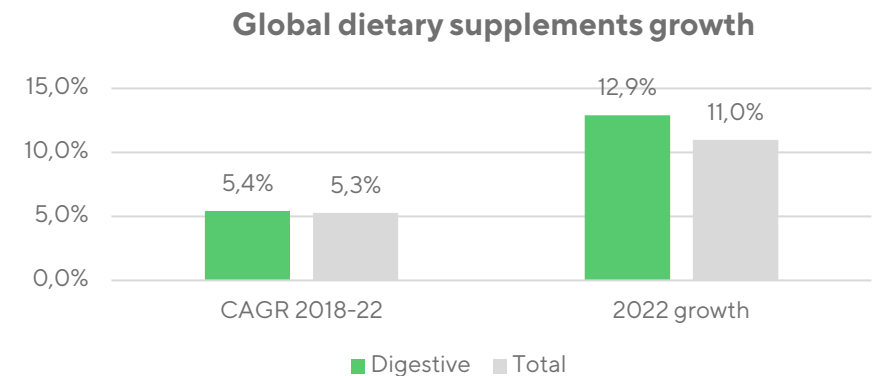
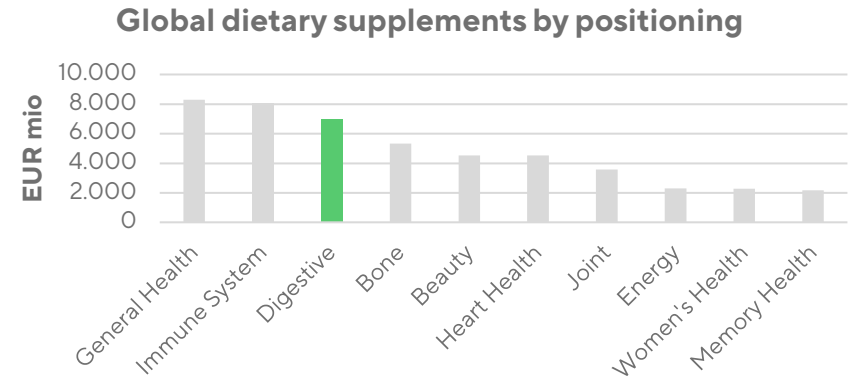
digestive health.

market data on
a rising trend



global market growth

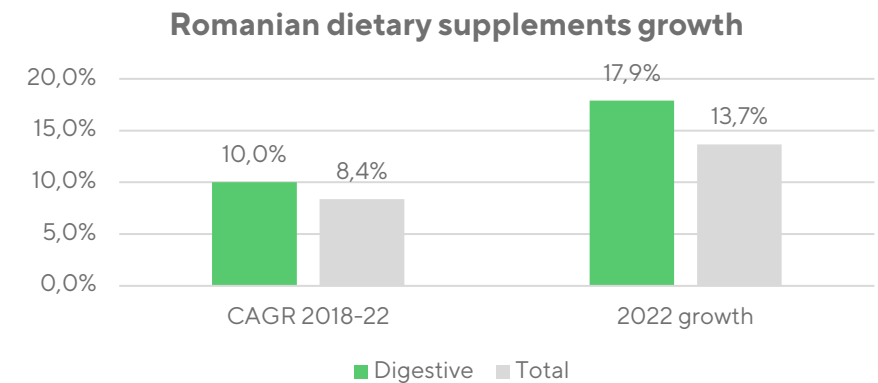
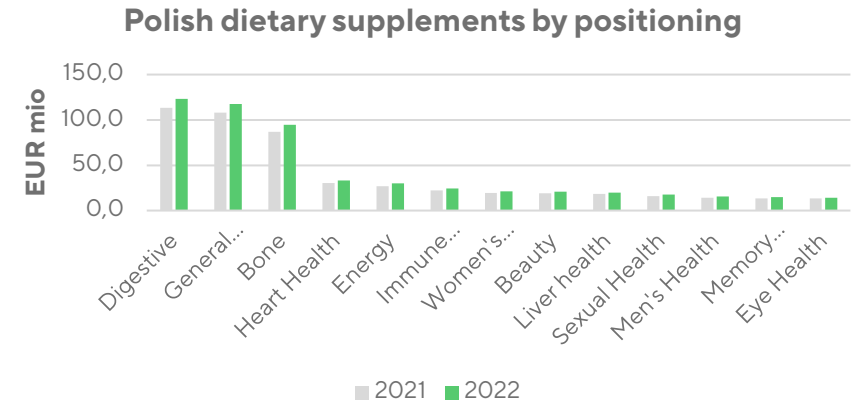
- due to an increased amount of research on the **microbiome**, consumer awareness about digestive health and its connection to overall health has increased
- **digestive health was the 3rd largest** dietary supplement category globally in 2022
- **Google searches increased by more than 50%** for “gut health supplements” in 2022 (Google Trends, February 2023)
- **global demand for digestive health supplements** has been growing faster than the total dietary supplement average in the past 5 years



Source: Euromonitor Consumer Health data, February 2023

CEE market growth

- **digestive health is also one of the largest** food supplement categories in countries in the CEE region (for example, the largest category in Poland, 3rd largest in Romania)
- **demand for digestive health supplements** has been growing faster than the total dietary supplement average in the past 5 years in the CEE region
- **over 10% of new supplement product launches** in 2022 in the CEE region had “digestive health” functional claims (Mintel GNPD, February 2023)
- **digestive aids were the 2rd fastest-growing** consumer healthcare category in the CEE region in 2022 (Nicholas Hall CHC Review, January 2023)

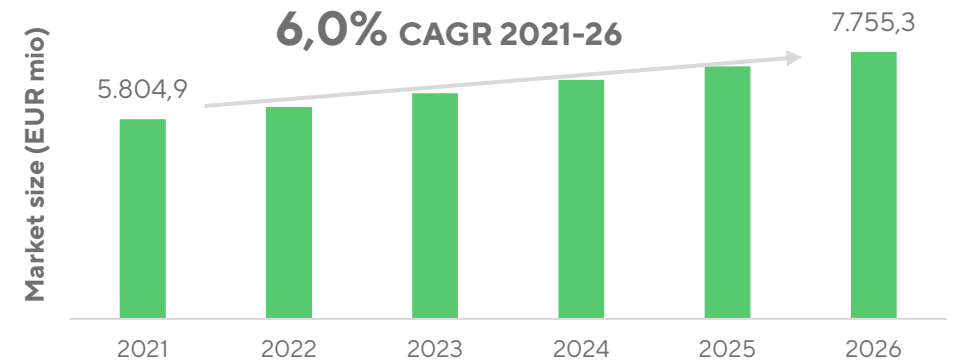


Source: Euromonitor Consumer Health data, February 2023

biotics trend

- **the global probiotics market** is forecast to grow at CAGR of 6,0% during 2021-26 and surpass 7,7 billion € in 2026
- **probiotics in the CEE region** are projected to grow faster than the global average of 6,0% during 2021-26
- **probiotics already represent a higher share** of the total vitamins and dietary supplements market than average in some countries (POL, HUN)
- **given the growing digestive segment**, the growth in awareness, and projections for probiotics, the CEE region appears to be promising for new biotics launches

Global probiotic supplements market forecast



CEE probiotic supplements growth forecast



Source: Euromonitor International, August 2022

segment development

- leading brands in CEE are launching new products addressing digestive health, a growing number of them are based on clinically studied, branded ingredients



Orkla POL

Positioned to promote healthy bowel movements and support gut wellbeing
Launched in 2020



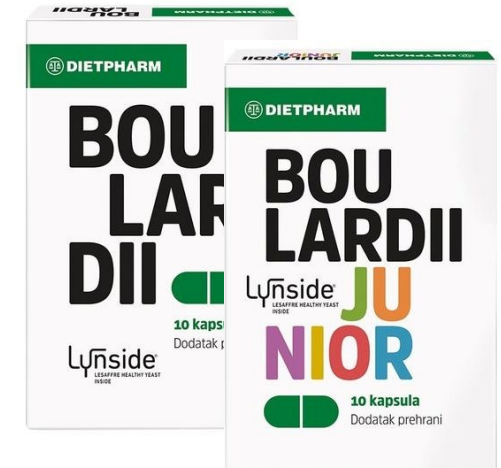
Evelar RUS

Positioned for digestive health and bloating
Line extension launched in 2021



S&D Pharma SVK

Based on branded probiotics
Relaunched in 2022



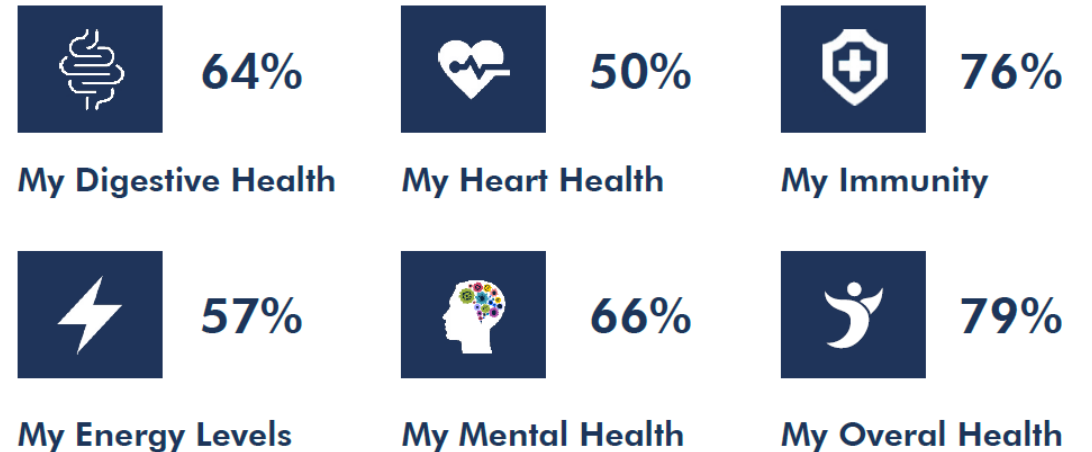
Dietpharm CRO

Based on Lynside®
Launched in 2020

consumer concern

- **79% of global consumers recognize the link** between digestive health and overall health (FMCG Gurus survey, 2022)
- **64% of global consumers stated they use supplements** to improve their digestive health when asked which health areas are they looking to address
- **27% of consumers currently use at least one of the biotic ingredients** to address digestive health, gut microbiome, and immune health (IngredienTracker Consumer Survey, 2022)

What areas of your health do you want to improve/address by using supplements?

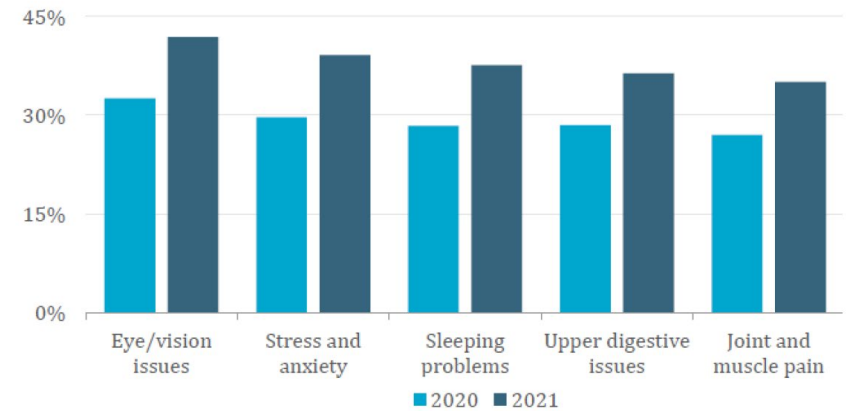


Source: FMCG Gurus, September 2022

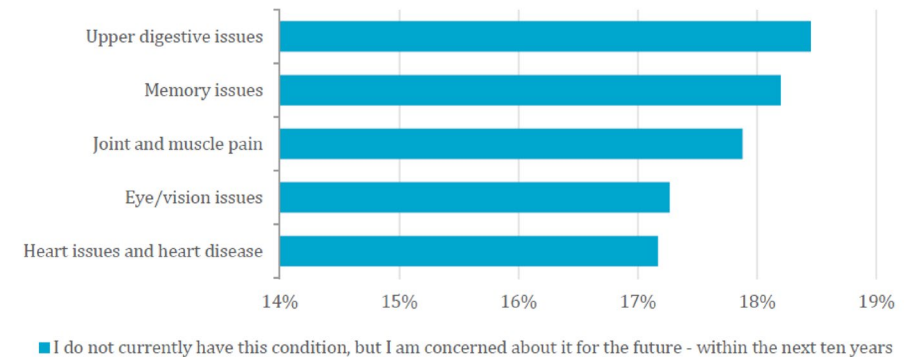
future trend

- upper digestive issues have been **in the top 5 consumer health concerns** in the past years
- **European consumers named upper digestive issues** as their top health concern for the next 10 years, stating they don't currently suffer from this condition but are concerned about it in the future
- leading brands globally and in the CEE region are launching a broad range of products beneficial to gut microbiota and digestive health **based on branded and clinically studied ingredients**

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

Global and CEE market trends in combination with consumer health concerns show a promising future market opportunity for **digestive health supplements, especially those tapping into the biotic trend.**





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