



# collagen.

an exploding  
topic in CEE  
markets



# Collagen is an exploding Google topic in CEE markets.



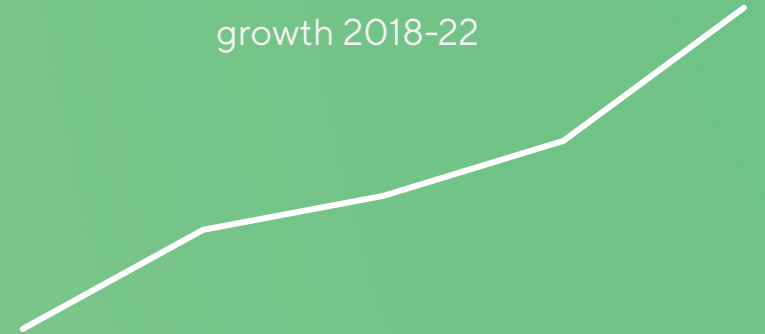
**+ 238%**

growth 2018-22



**+ 283%**

growth 2018-22



**+ 212%**

growth 2018-22



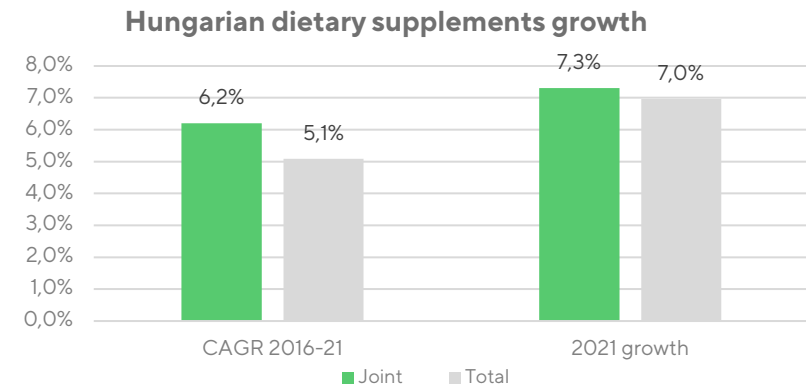
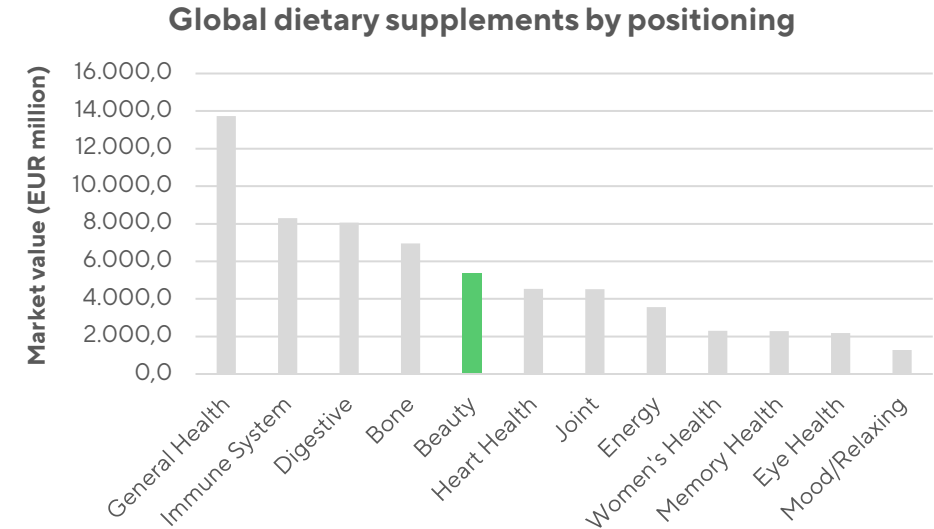
**+ 294%**

growth 2018-22



# market growth

- **rising obesity and life expectancy** are increasing joint health issue occurrence
- **as a result of poor dietary and exercise habits** during the pandemic, many people are looking to improve various health areas, including skin health
- **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**
- **beauty supplements were among the top 5** largest dietary supplement categories globally in 2022
- **Google searches increased by 17,6%** for “skin health supplements” in 2022 (Google Trends)



Source: Euromonitor Consumer Health data, March 2023

# consumer concerns

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Among global consumers:

66%

recognize the influence of skin health on their overall health

21%

take food supplements to improve their skin health

61%

find the products positioned around improving bone & joint health appealing

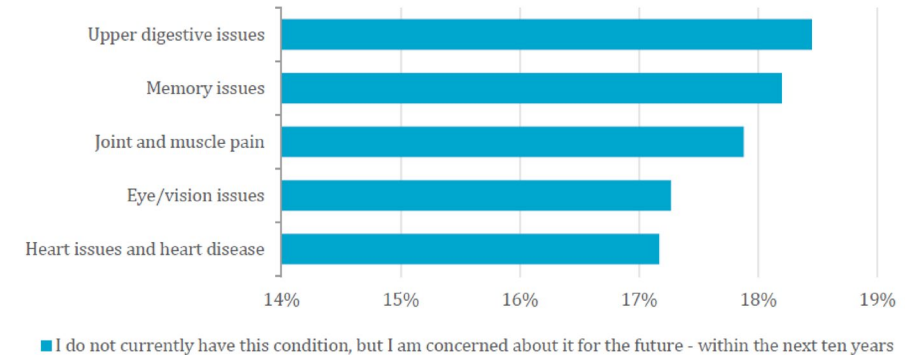
Source: FMCG Gurus, 2022



# future trend

- joint and muscle pain have been **in the top 5 consumer health concerns** in the past years (Euromonitor International Survey, 2020/2021)
- 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

Top Health Concerns for European Consumers  
for the Next 10 Years



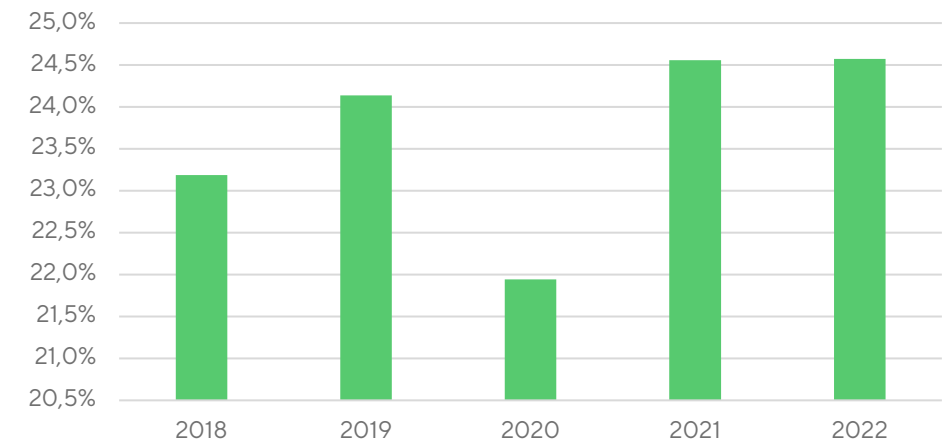
Source: Euromonitor International's Health & Nation Survey, 2020, 2021

# collagen use

- **43,4% of all new global dietary supplement product launches** based on collagen ingredients in 2022 had bone health or skin, nails & hair functional claims (Mintel GNPD)
- **collagen ingredients were present in 24,6%** of all new dietary supplement launches in the CEE region in 2022
- **collagen is the reigning ingredient** among specialty supplements (NBJ USA, 2022)



**Collagen in new product launches in the CEE region**



Source: Mintel GNPD, March 2023



# There is a promising market opportunity for collagen ingredients.

45%

of global consumers associate collagen  
with skin health (FMCG Gurus, 2022)

in 2020, Frost & Sullivan named  
collagen peptide as one of the

**top growth  
opportunities  
to watch**

# premium segment development

- **Frost & Sullivan** recently published a “Global Bone and Joint Health Ingredients Growth Opportunities” report, which **highlights the opportunity for clinically studied ingredients, such as collagen** in the European market
- **global and CEE brands are launching** a broad range of products based on clinically studied and branded collagen ingredients addressing joint health and beauty



**Dr. Loges, GER**  
Based on UC-II®  
Launched in 2022.



**Remé, POL**  
Based on VERISOL®  
Launched in 2022.



**Increasing interest in joint and skin health and a consumer shift towards premium products present a clear market opportunity for clinically studied branded collagen ingredients in the CEE.**





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