



hermes consilium



added value vitamins & minerals

market data on a rising trend



Vitamins & minerals hold a sizable dietary supplement market share in the CEE countries.



53,4%

market share
in 2022



50,3%

market share
in 2022



45,2%

market share
in 2022

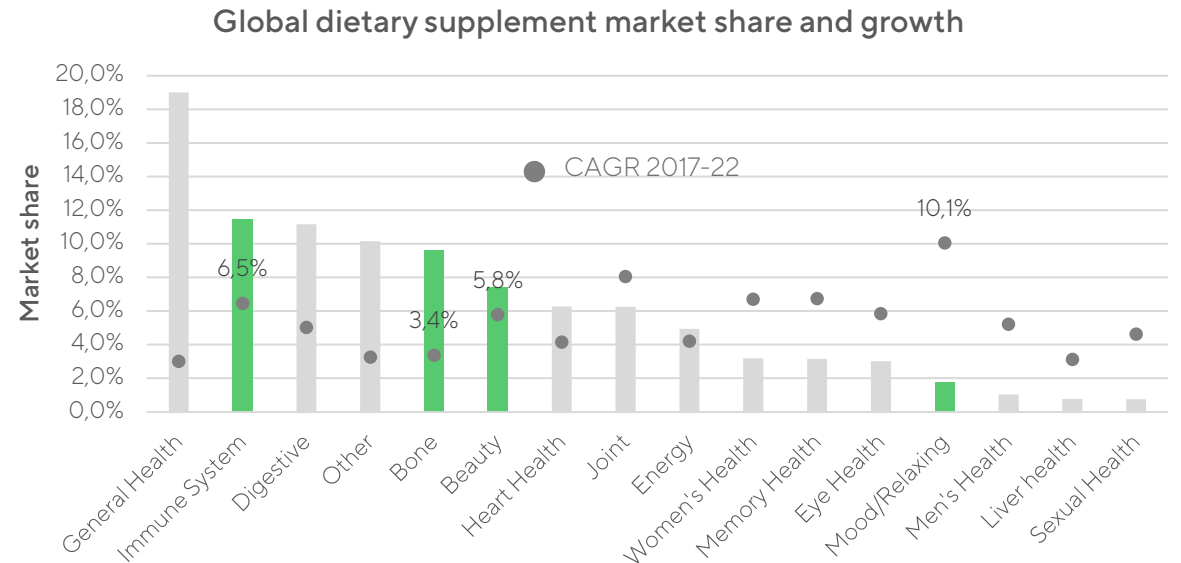
vitamins and minerals use

- **vitamins and minerals** can be used to address a variety of symptoms and indications – from immunity and general health to bone health, beauty, fertility, and stress
- **they are most commonly used** in dietary supplements in segments such as immunity, bone health, beauty, and mood



global market trends

- **immunity, bone health, beauty, and mood/relaxing** dietary supplement categories held approx. a third of the global dietary supplement market in 2022
- **immunity, bone health, and beauty** are among the 5 largest dietary supplement categories globally
- **mood/relaxing segment** is the fastest-growing global dietary supplement segment

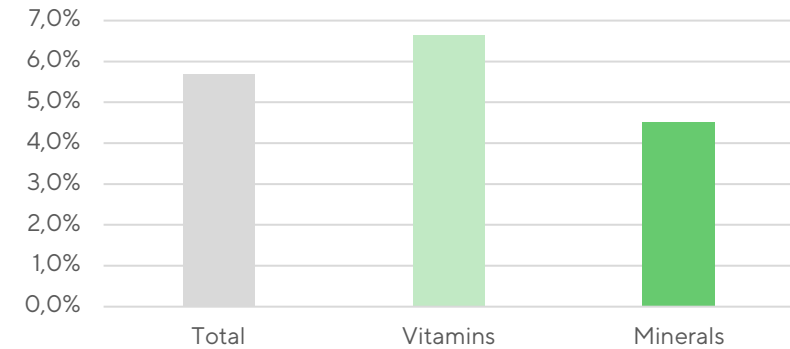


Source: Euromonitor International, June 2023

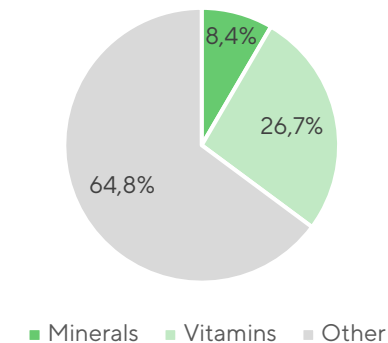
global market growth

- **vitamins have been growing faster** than the total dietary supplement average globally in the past 5 years
- **in 2027, the vitamin category** is forecasted to reach a value of 39 billion EUR, and **minerals** are forecasted to reach a value of 12 billion EUR (Euromonitor)
- together the categories are forecasted to account for **over 35% of total dietary supplement market** in 2027

Global dietary supplements growth in the past 5 years (CAGR %)



Vitamins and minerals dietary supplement categories share forecast in 2027

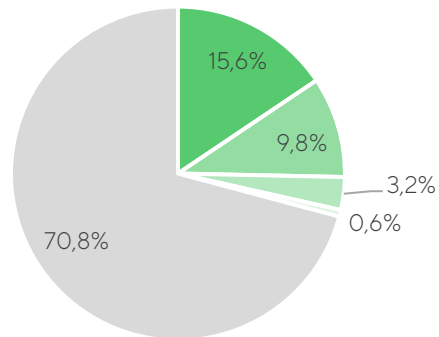


Source: Euromonitor International, June 2023

CEE market trends

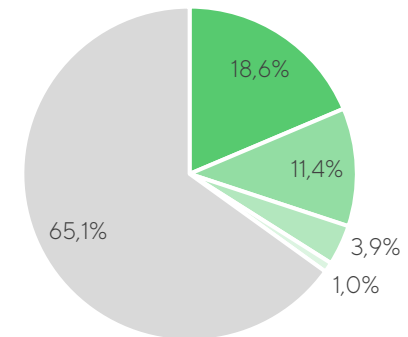
- **immunity, bone health, beauty, and mood/relaxing** dietary supplement categories held approx. a third of the dietary supplement market in 2022 in the CEE countries

Hungarian dietary supplements market share



■ Immune System ■ Bone ■ Beauty ■ Mood/Relaxing ■ Other

Romanian dietary supplements market share



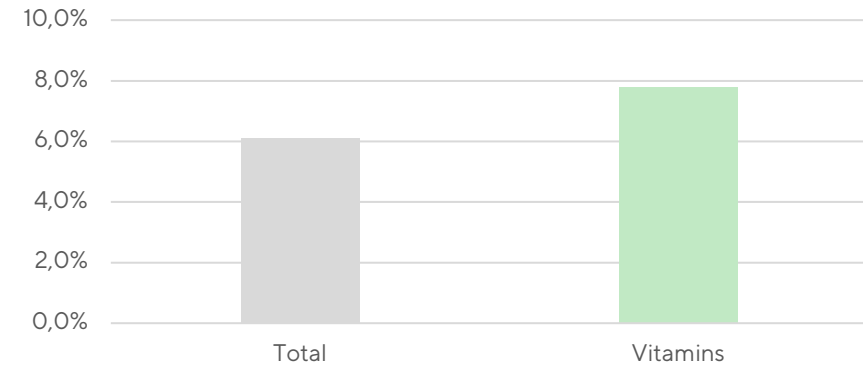
■ Immune System ■ Bone ■ Beauty ■ Mood/Relaxing ■ Other

Source: Euromonitor International, June 2023

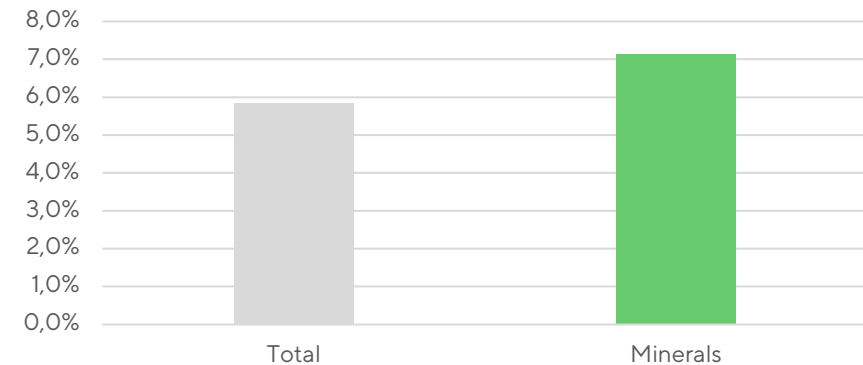
CEE market growth

- **vitamins have been growing faster** than the total dietary supplement average in the CEE region in the past 5 years
- **minerals are forecasted to grow faster** than the total dietary supplement average in the CEE region from 2022-2027

Polish dietary supplements growth in the past 5 years (CAGR %)



Romanian dietary supplements growth forecast 2022-27 (CAGR %)



Source: Euromonitor International, June 2023



66%

of global consumers recognize the influence of skin health on their overall health

37%

of European Consumers said their stress levels became worse during the pandemic, this number is even higher in the CEE countries

61%

of global consumers find the products positioned around improving bone & joint health appealing

market opportunity

- 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**
- the report states ingredients **like vitamin K will continue to increase in penetration**

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

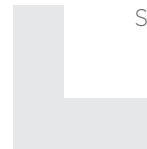
future trend

- **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
- **stress and burn-out are getting increasingly recognized** by health institutions (e.g. the WHO), thusly opening the market to brands based on medical detailing

59%

of Europeans said they experienced or felt close to a burn-out

Source: STADA health report 2022



global premium segment development

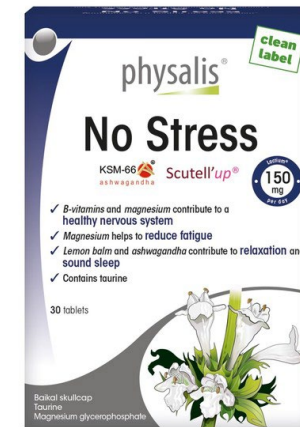
- recently, the need for differentiation in crowded segments has brought on several new product launches based on branded vitamins and minerals



PT Kalbe, IDN
Based on PureWay C®.
Positioned for general health.



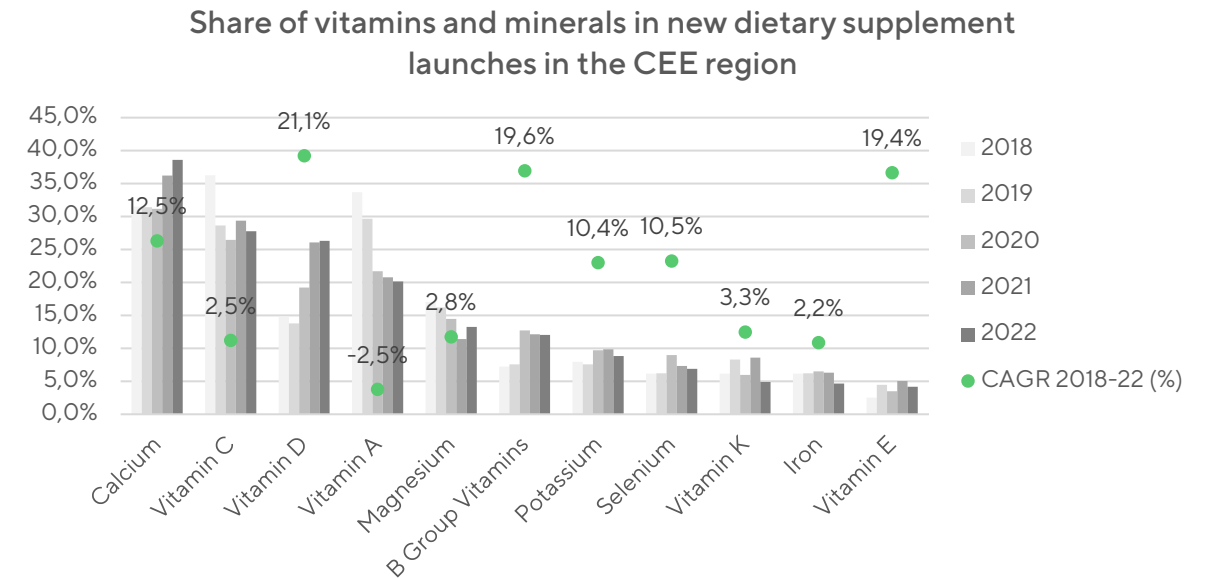
Laboratoire CCD, FRA
Based on K2VITAL® and vitamin D3.
Positioned for immunity and bone health.



Physalis, BEL
Based on Quatrefolic®, other branded ingredients, vitamins, and minerals.
Positioned for mood/stress.

CEE product trends

- among vitamins and minerals, **vitamins C, and D, B group vitamins, magnesium, and calcium** are most commonly used in new dietary supplement launches in the CEE region
- in the past 5 years the use of **vitamins D, A, and K** in new products in the CEE region has grown the most



Source: Mintel GNPD, June 2023

CEE premium segment development

- recently, advanced products based on branded, clinically studied ingredients and with advanced delivery systems are increasingly appearing



Gal Vital, HUN

Based on VitaMK7® in combination with other vitamins and minerals.
Positioned for general health.



Olimp Labs, POL

Based on PureWay C® and vitamin D3.
Positioned for children's immunity.

An increasing share of new product launches based on vitamins and minerals, and a growing need for product differentiation highlight a clear opportunity for clinically supported, branded ingredients in the CEE region.



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