



hermes consilium



sports nutrition

market data on a rising trend

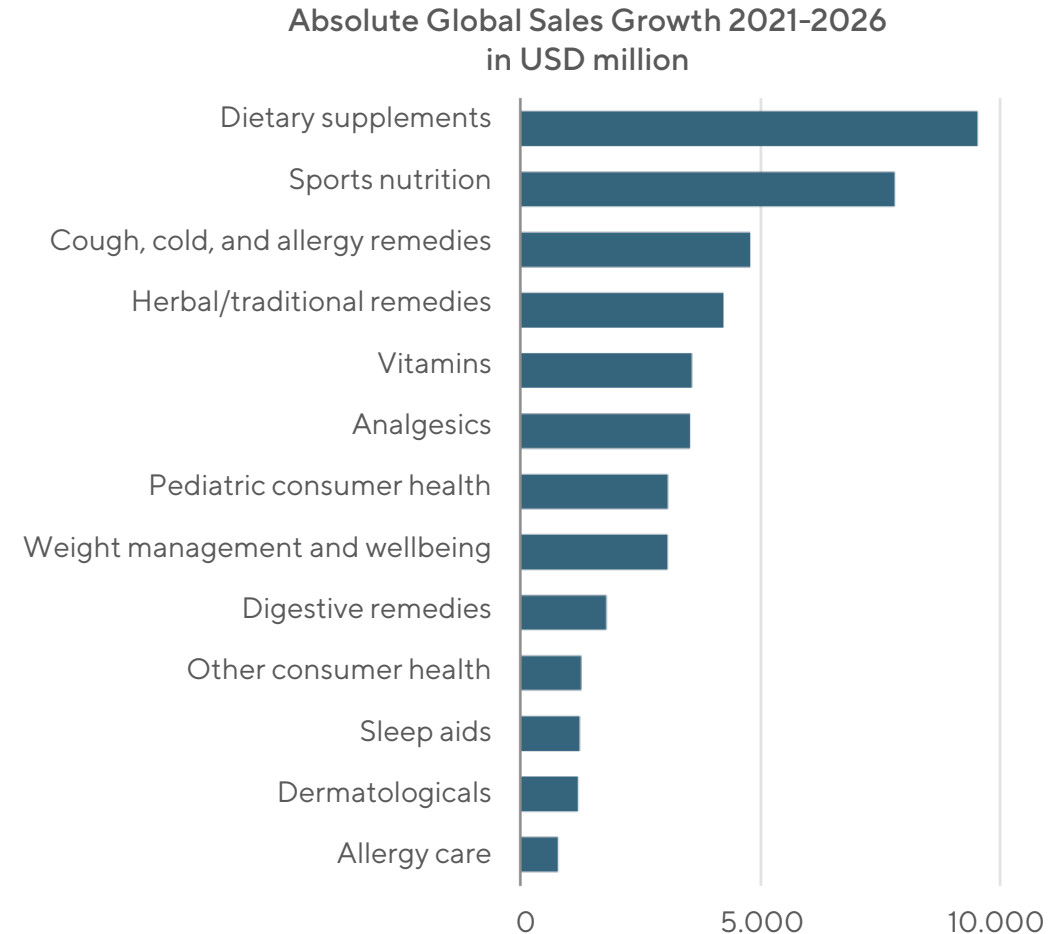


“Many people have purchased sports nutrition products in the last 6 months. This highlights how the sports nutrition market is no longer associated with a specific audience of active sport participants, instead it has become increasingly mainstream.”

- FMCG Gurus, March 2022

global market trends

- since 2021, the sports nutrition category has **been growing** as global consumers have returned to pre-COVID-19 lifestyles and is expected to be the second fastest-growing wellness category from 2021-26 (Euromonitor International)
- SPINS included sports nutrition in their **“Top supplement trends to watch in 2023 report”**, stating categories such as performance nutrition and energy & sports drinks reported double digit y-o-y growth in 2022



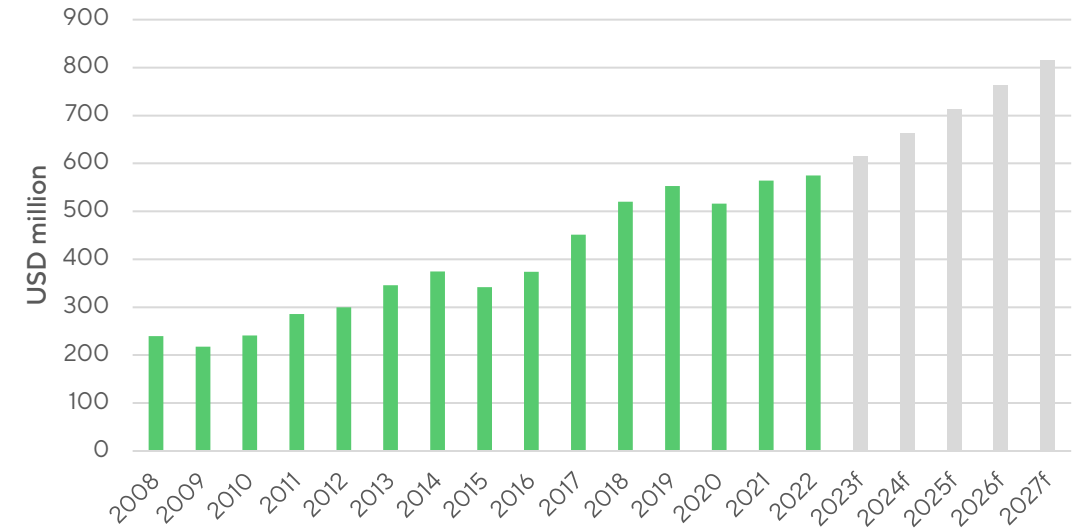
Source: Euromonitor International Voice of the Consumer: Health and Nutrition Survey, 2023

CEE market trends

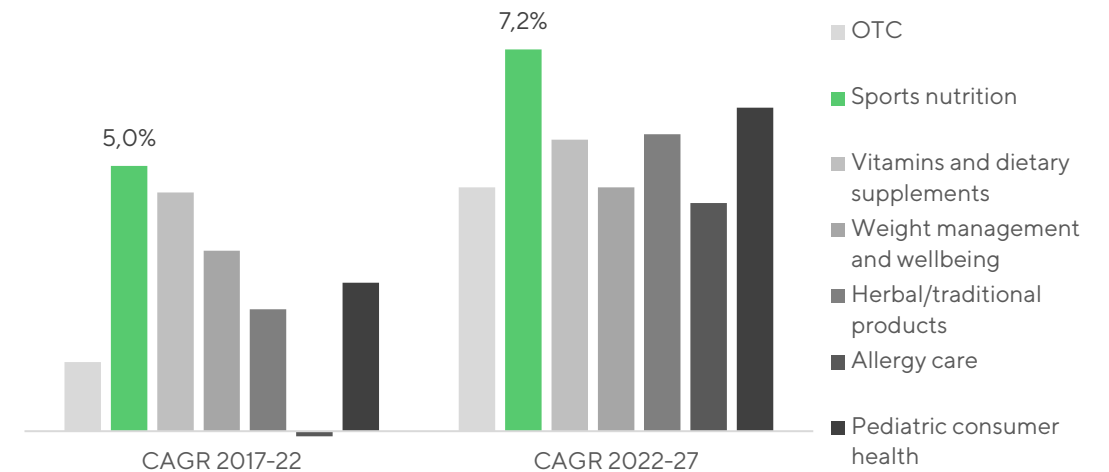
- the post-pandemic focus shift towards **active lifestyle** happened in the CEE region as well, causing sports nutrition category growth
- from 2017-2022, **sports nutrition had the highest CAGR** of all the consumer health categories in the Eastern Europe
- sports nutrition is **projected to grow at a CAGR of 7,2% from 2022-27** in the Eastern Europe, which indicates the highest growth among consumer health categories in the region



Eastern European sports nutrition retail value



Eastern European consumer health growth by category

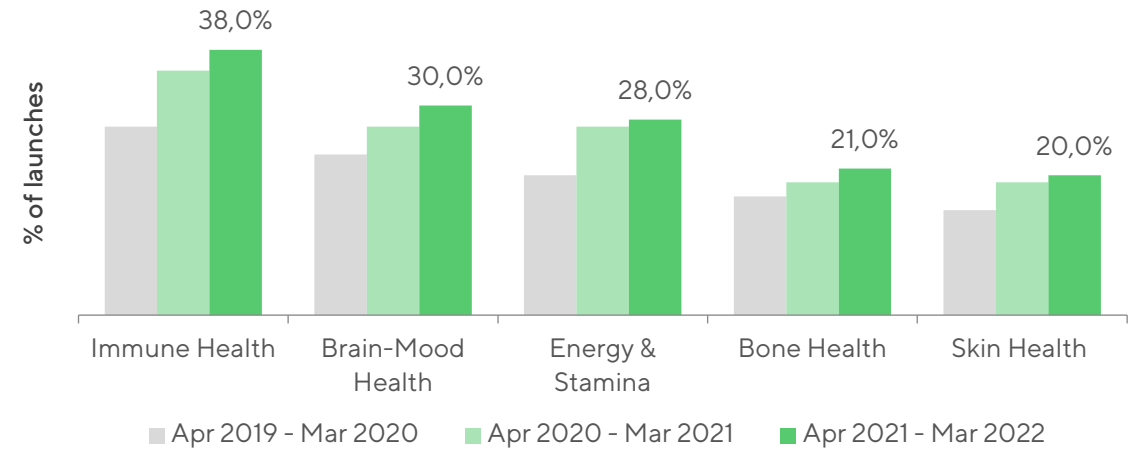


Source: Euromonitor International, 2023

CEE market growth

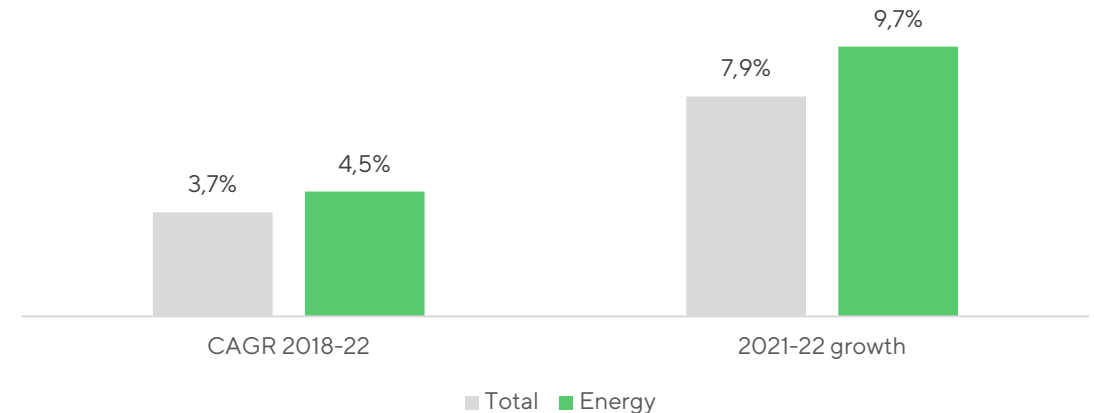
- sports nutrition products can also be found in dietary supplement categories such as **joint health, energy, weight management, performance, and muscle recovery**
- **energy & stamina supplements** were the second fastest-growing supplement category in Europe from April 2021 - May 2022
- **the energy category has been growing faster** than the total dietary supplement average in the CEE region in the past 5 years

Top 5 positionings for supplements in Europe



Source: Innova Market Insights, August 2022

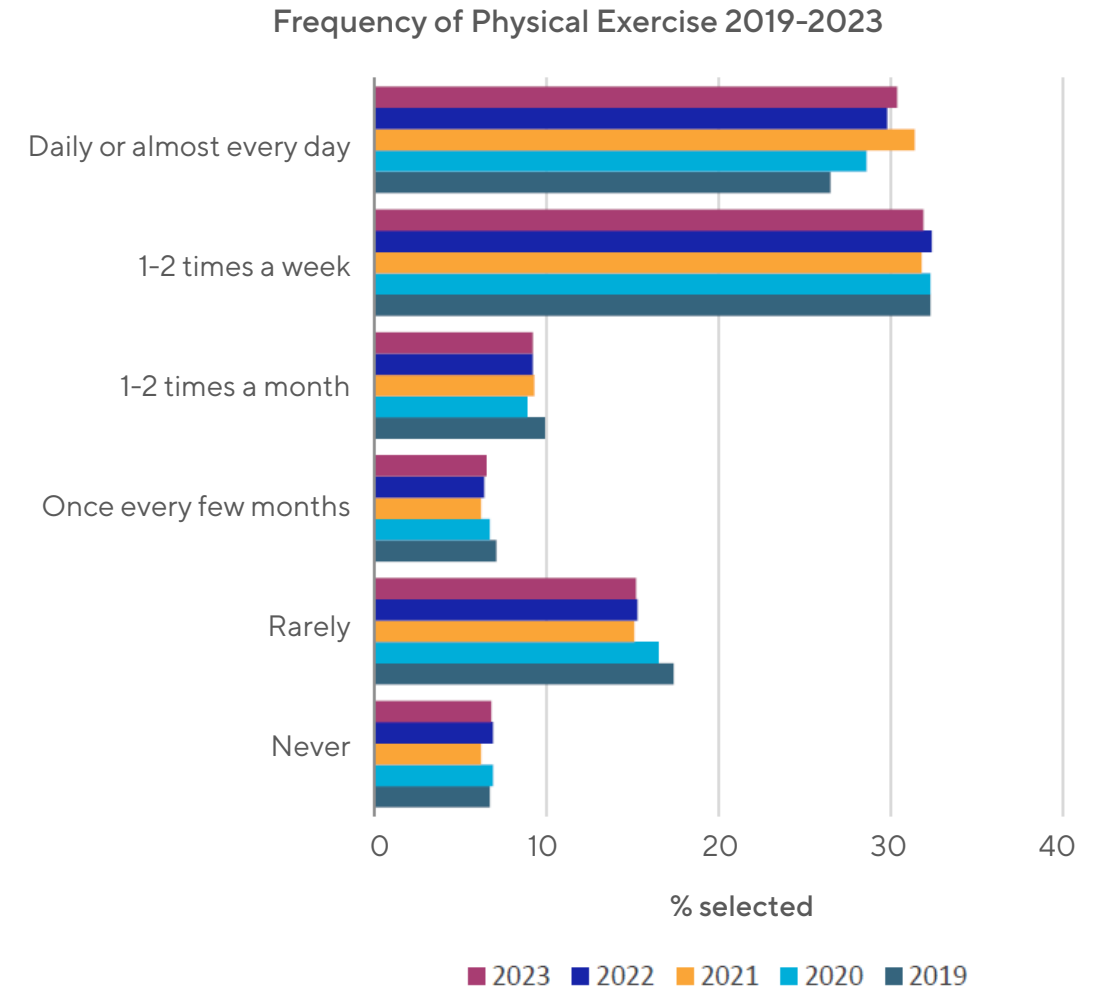
Polish dietary supplements market value



Source: Euromonitor International, July 2023

consumer concerns

- **the number of consumers who exercise daily** has risen since the pandemic – from 27% of respondents in 2019 to 31% in 2021 (Euromonitor International)
 - given that rates of exercise stay consistently flat over time, these marginal differences represented a considerable change in population level attitudes about exercise
- **60% of global consumers state** that they have become more conscious of their health over the last two years, with their key desire being to stay fit and active until as late in life as possible (FMCG Gurus)



Source: Euromonitor International Voice of the Consumer: Health and Nutrition Survey, 2023

future trend

- recently, due to more public addressing of blood glucose regulation and the advances in wearable technology, **weight management category has been gaining a lot of attention**
- while the share of products with a **functional claim “slimming” remains relatively small, it grew by 70%** in the past 5 years in the CEE region (Mintel)



premium segment development

- growth typically brings the development of the premium, clinically supported segment



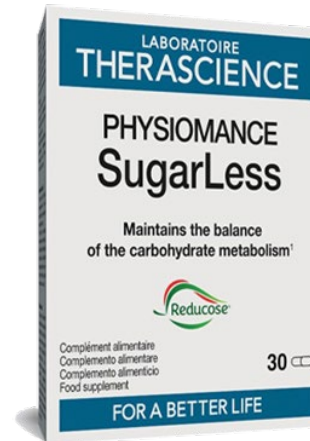
AllNutrition, POL

Based on Capsimax®.
Positioned for fat loss by
stimulating metabolism.



Life Extension, USA

Based on Crominex®.
Positioned to support glucose
metabolism.



Laboratoire Therascience, FRA

Based on Reducose®.
Positioned to maintain the
balance of the carbohydrate
metabolism.



Bio Medical Pharma, POL

Based on NewCaff®.
Positioned to improve
concentration and reduce fatigue.

A growing popularity of sports nutrition and an increasing consumer interest in fitness indicate an opportunity for added-value ingredients globally and in the CEE region.



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