



hermes consilium



# metabolic syndrome

an opportunity for new solutions



# Obesity and diabetes are severe and growing issues in the CEE region.



Approx.

**25%**

of adults in the CEE region is overweight.

## Projected diabetes prevalence growth:



**6,8% → 8,5%**

2021

2045



**7,0% → 8,5%**

2021

2045

# metabolic syndrome

- **metabolic syndrome is a cluster of common abnormalities**, including insulin resistance, impaired glucose tolerance, abdominal obesity, reduced high-density lipoprotein (HDL)-cholesterol levels, elevated triglycerides, and hypertension
- **incidence is increasing** in line with the number of people who are overweight or obese

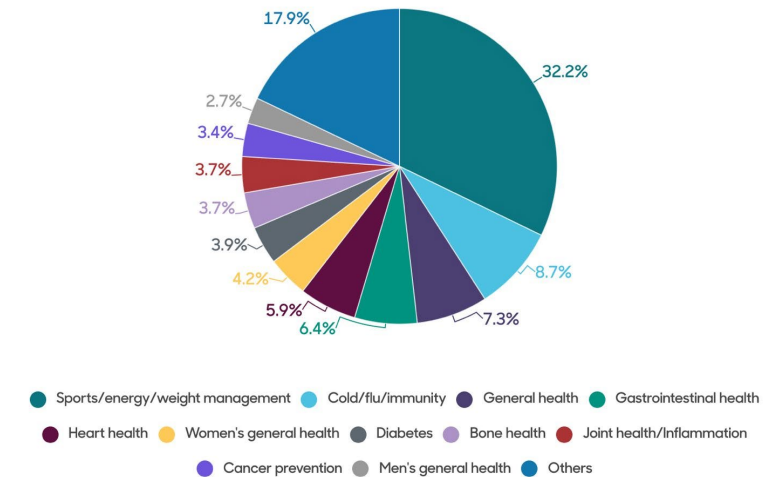


# global market trends

- **39% of the global population** is overweight (NIQ radar) and **9,8% of worldwide adults** had diabetes in 2021 (IDF Diabetes Atlas)
- recently, due to more public addressing of blood glucose regulation and the advances in wearable technology, the **weight management category has been gaining a lot of attention**
- in 2022, weight management was the **fastest-growing category in the USA**, which can possibly turn into a global situation in the future given the current obesity growth trends
- the global weight management category is projected to **grow faster than OTC and VDS categories** in the future years

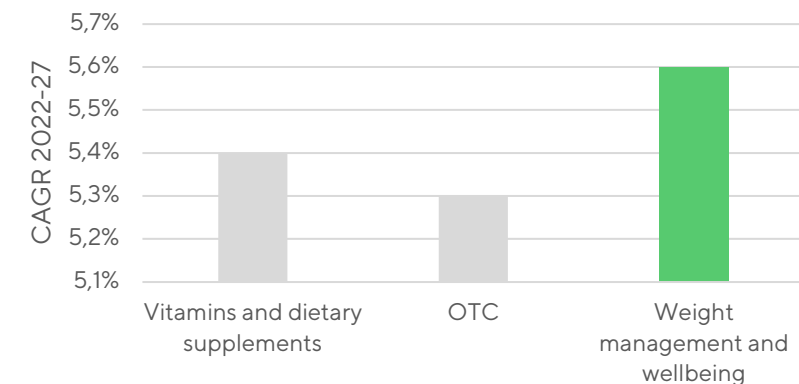


Market share of top conditions, 2022



Source: Nutrition Business Journal, 2023

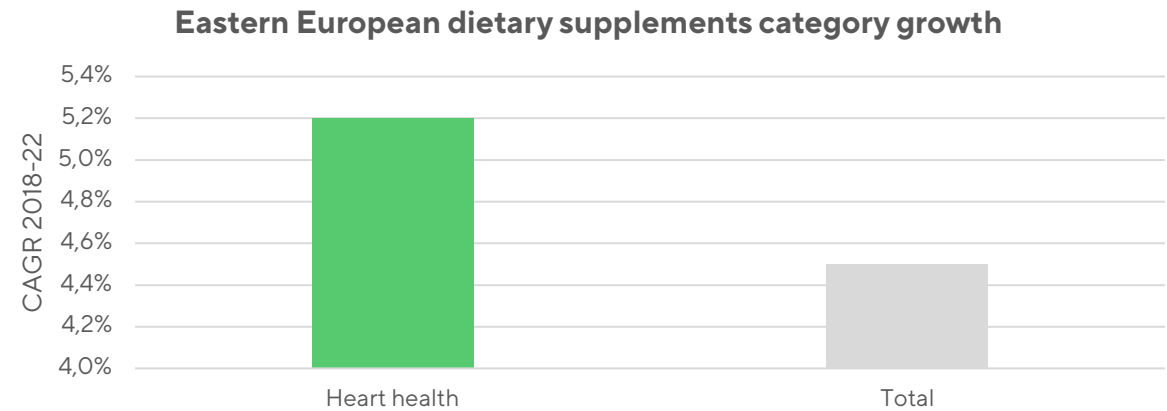
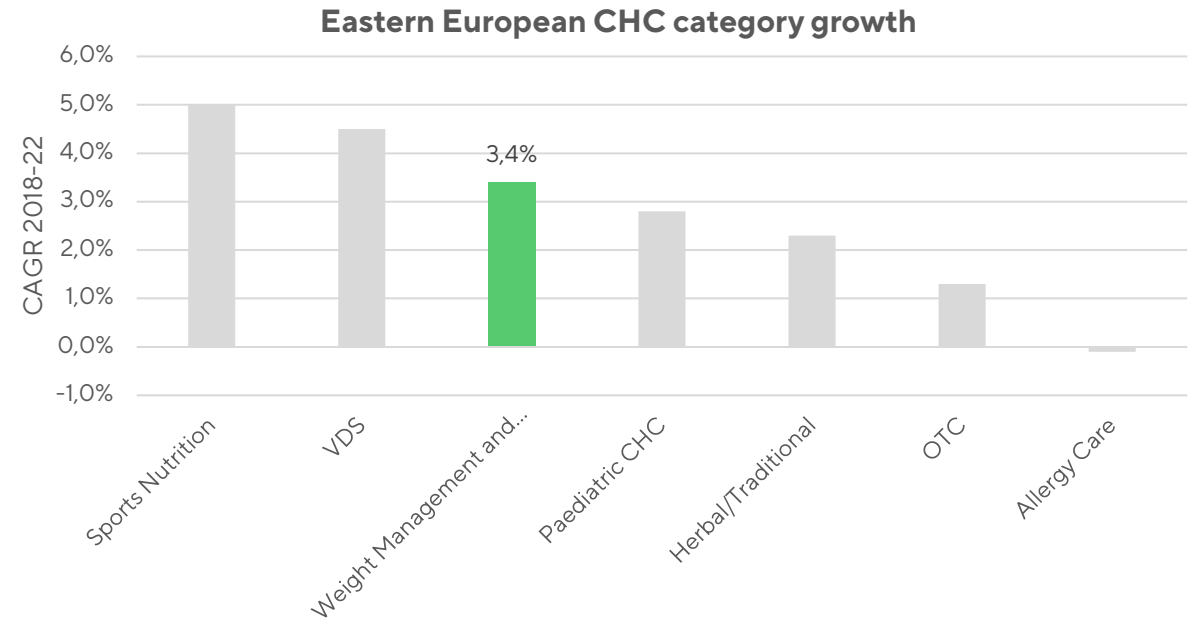
Global CHC category growth projections



Source: Euromonitor International, August 2023

# CEE market trends

- **similar to global trends**, the weight management category has been gaining a lot of attention in the CEE region as well
- **it was the 3<sup>rd</sup> fastest-growing** consumer healthcare category in the CEE region in the past 5 years and it grew by a **CAGR of 3,4%** from 2018-22
- **the heart health dietary supplement category** grew faster than the total Eastern European supplement average in the past 5 years

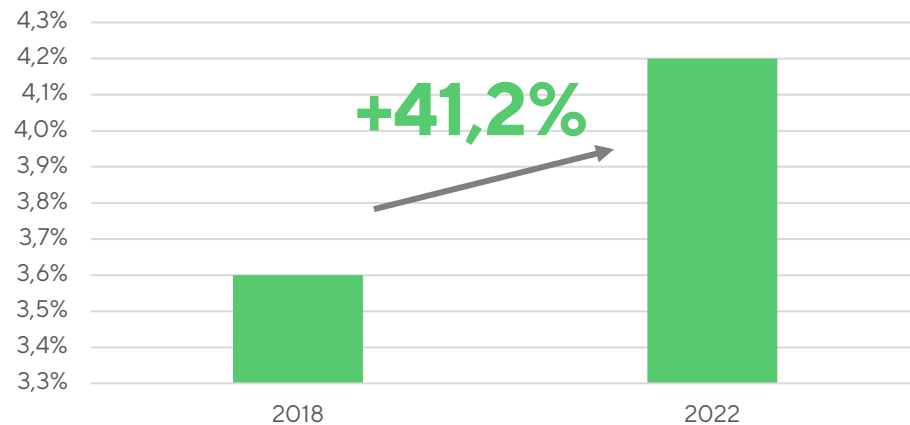


Source: Euromonitor International, August 2023

# product trends

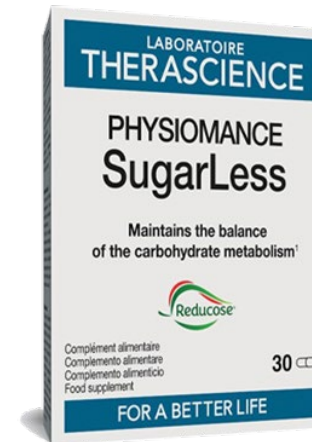
- while the share of new product launches with a functional claim “slimming” remains relatively small, it grew over 40% in the past 5 years in the CEE region (Mintel)

Share of new dietary supplement product launches with the functional claim “slimming” in the CEE region



Source: Mintel GNPD, August 2023

- global and CEE brands are launching a range of products positioned around metabolic health



Laboratoire Therascience, FRA  
Based on Reducose®.  
Positioned to maintain the balance of the carbohydrate metabolism.



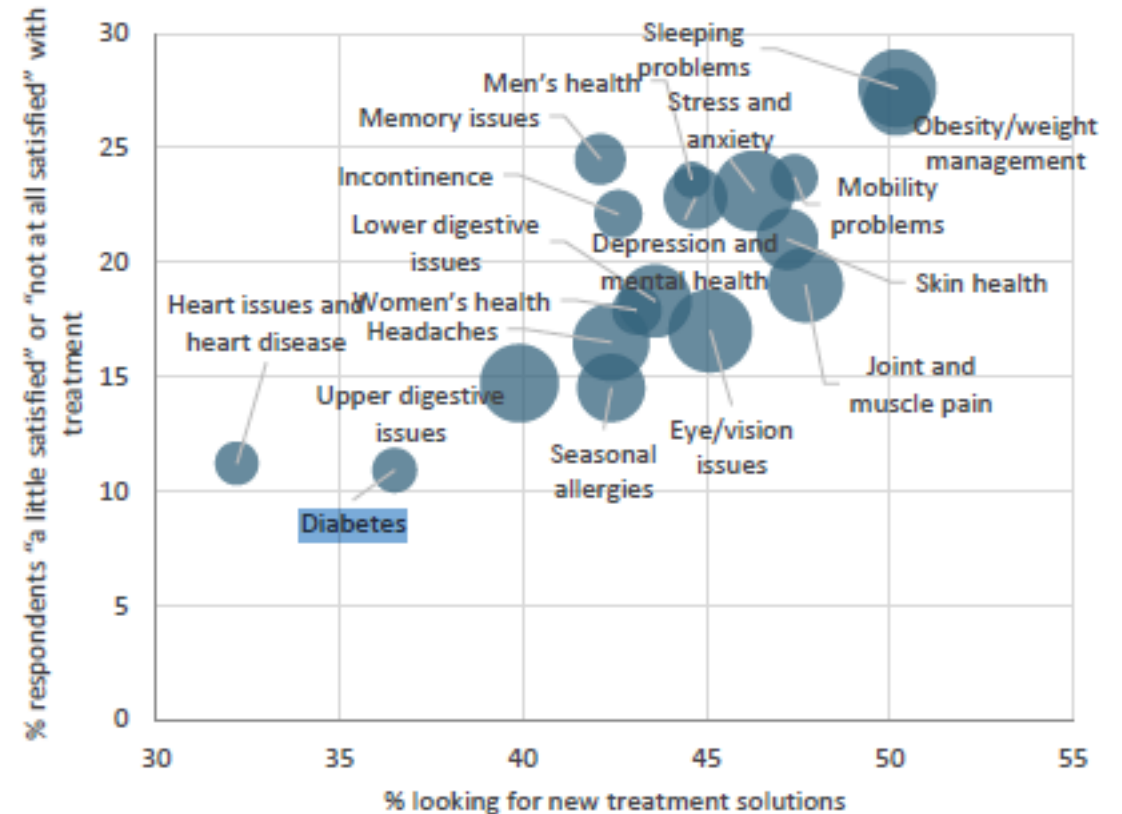
LaviGor, SPA  
Based on Metabolaid® and Olivattla™.  
Positioned to help cope with metabolic syndrome.

**European consumers are highly dissatisfied with current obesity/weight management treatments and are looking for new solutions.**

# consumer concerns

- **over 25% of European consumers** are dissatisfied with current solutions for obesity/weight management and **over 50%** are frequently looking for new ways to address their issues
- according to FMCG Gurus, **69% of global consumers think a healthy weight** is important due to overall health and well-being

Consumer satisfaction with current treatments by health issue



Source: Euromonitor International Voice of the Consumer: Health and Nutrition Survey, 2022



**A growing number of consumers with weight and blood glucose problems and their dissatisfaction with currently available solutions indicate an opportunity for added-value ingredients globally and in the CEE region.**



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