



hermes consilium

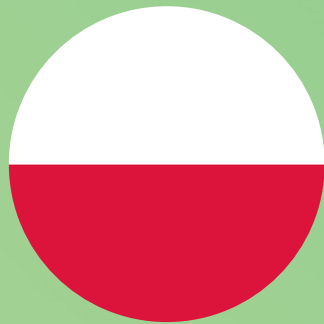


# immunity

stand out in a crowded market  
with added-value ingredients



**Immunity is one of the largest and fastest-growing supplement categories in the CEE region.**



**6,0%**

**CAGR  
2019-23**



**8,5%**

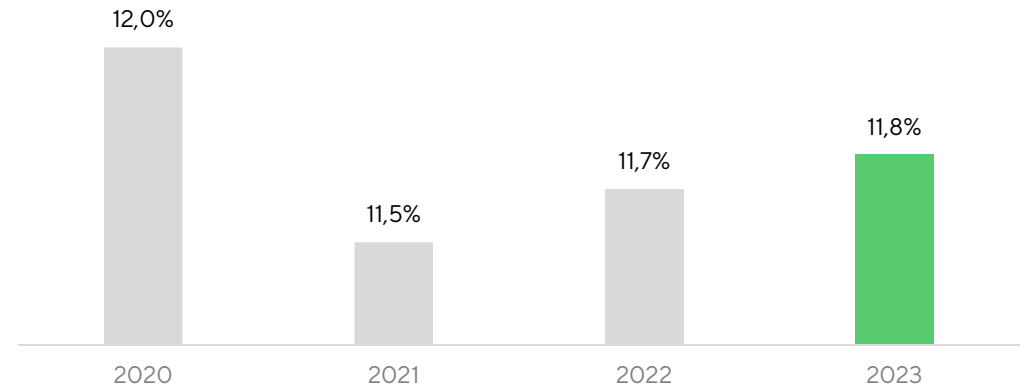
**CAGR  
2019-23**

# global market trends

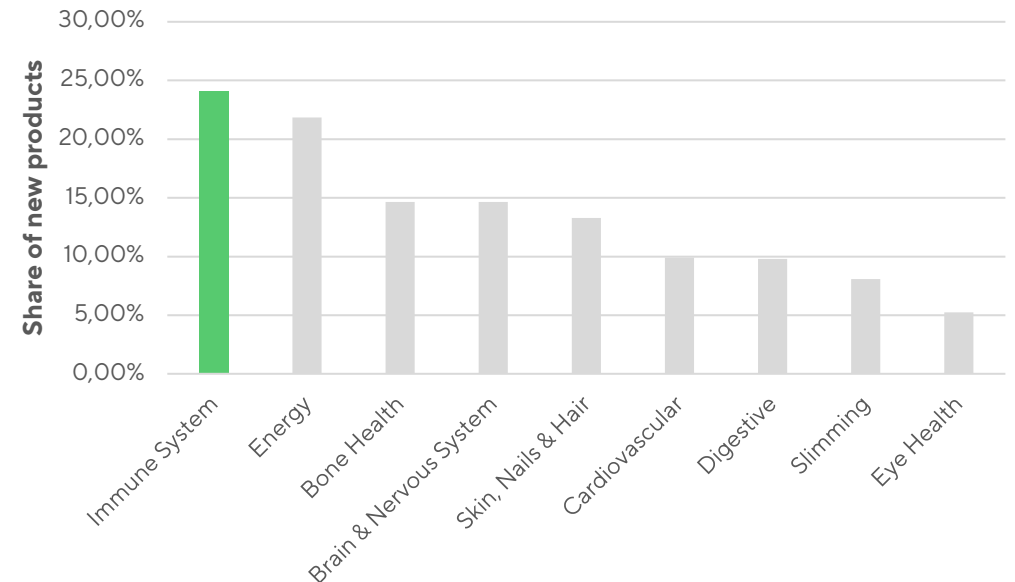
- **immunity is one of the largest** supplement categories globally (Euromonitor)
- post-pandemic, the growth of the category has slowed down slightly, but **it's now starting to rise again**
- **immune support is the world's number 1 positioning** of new supplement launches (24,1% in 2023 according to Mintel GNPD)



Global immune health supplements growth



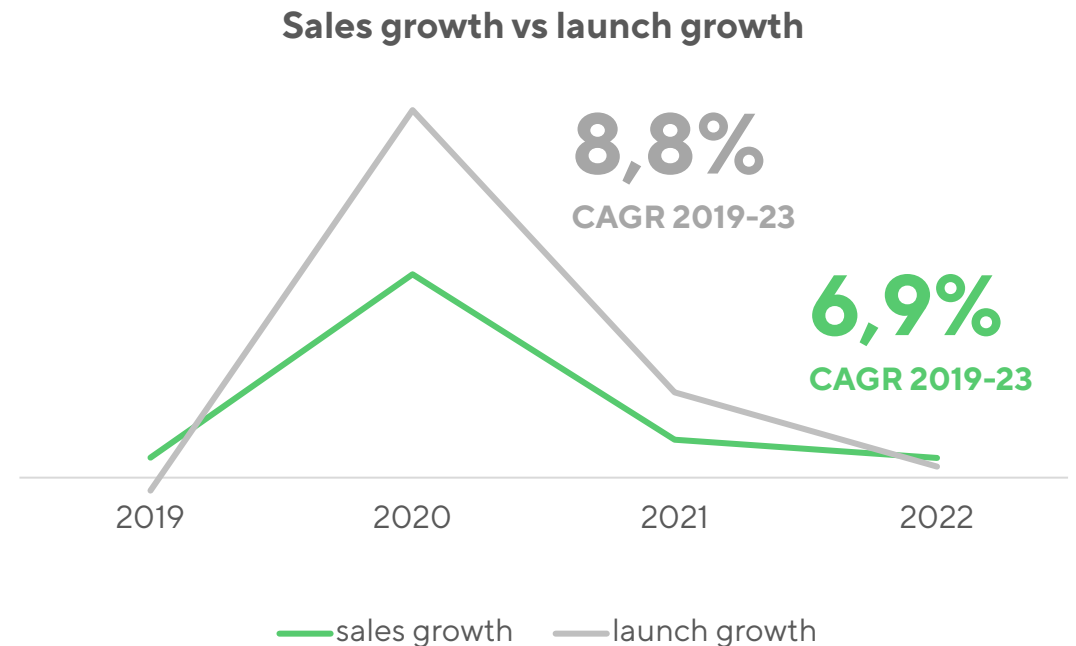
Functional claims in new product launches globally



Source: Euromonitor International, Mintel GNPD, September 2023

# global market growth

- the sales of immunity supplements have grown at a **6,9% CAGR** in the past 5 years (2019-23), while **new immunity launches** have grown more, with a **8,8% CAGR**
- the growth of new launches is slowing down but because the market is extremely crowded **it's increasingly crucial to formulate a product that stands out**

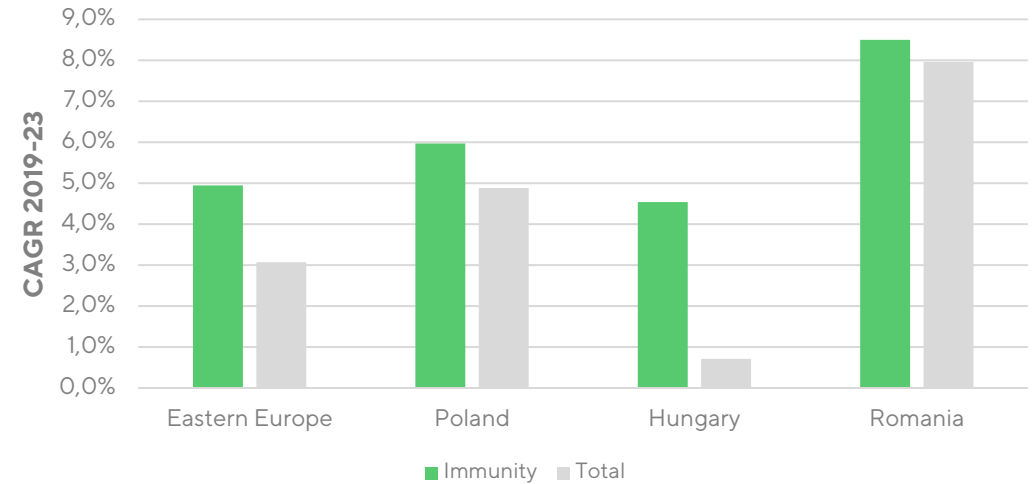


Source: Euromonitor & Mintel, 2023

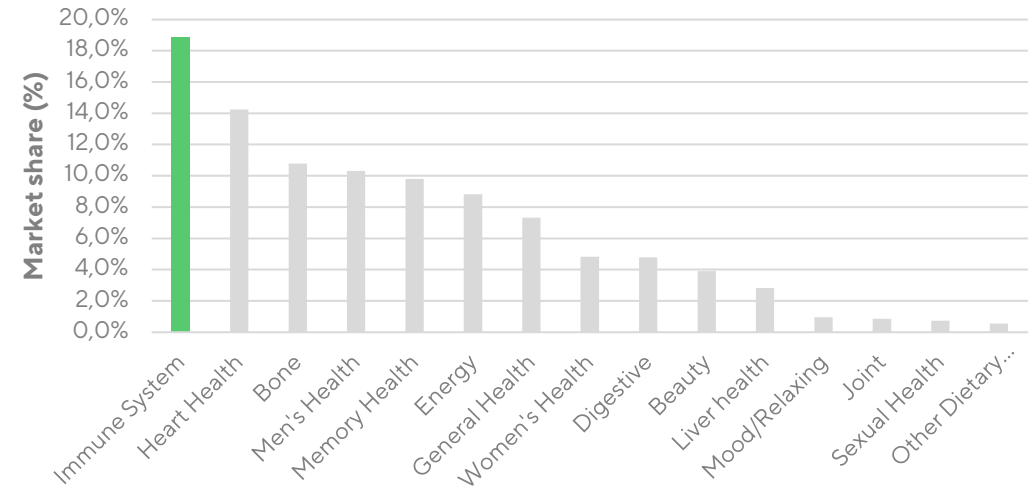
# CEE market trends

- **similar to global trends**, the immune health category has grown faster than the total dietary supplement category in the CEE region in the past 5 years
- in 2023, **immune health had the largest market share** among dietary supplement categories in several CEE countries
- the market is crowded – with 31,5% **immune health functional claim is the number 1 positioning** of new product launches in the CEE region in 2023 (Mintel GNPD)

CEE region dietary supplements growth



Romanian dietary supplements market share in 2022



Source: Euromonitor International, September 2023

**To achieve success in a  
crowded market, it is  
crucial for a product to  
stand out.**

# consumer preference

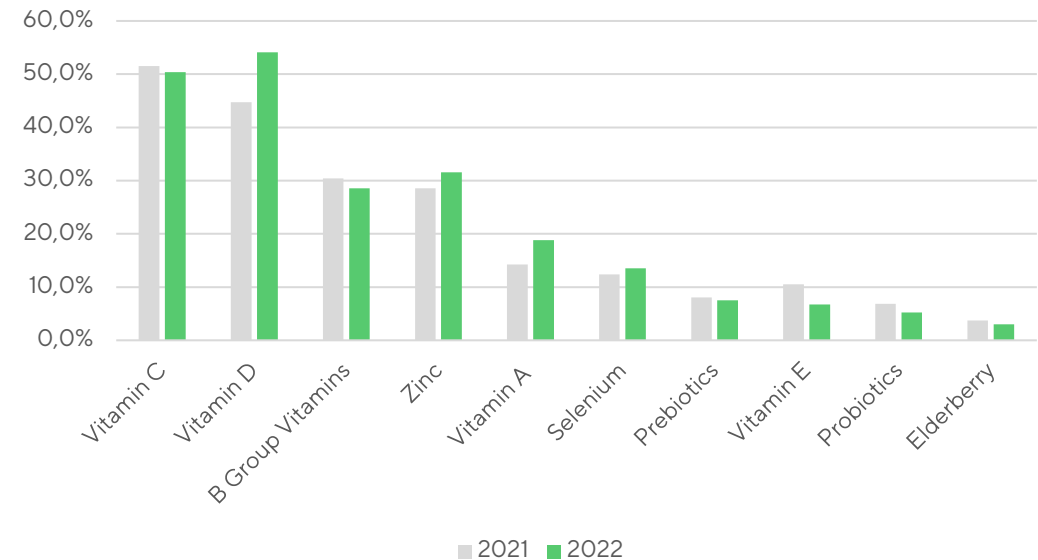
- **80% of consumers value multifunctional claims** on food, drink, and supplements that are positioned around supporting the immune system (FMCG Gurus)
- **product format and product ingredients** were listed among **the most important** consumer purchasing consideration factors for EU consumers in the 2022 Ipsos consumer survey



# product trends

- recently, market leaders are increasingly deciding on launching immune health supplements **based on unique ingredients** to stand out
- in the CEE region, vitamins C, D, A, B group, and zinc are the most used ingredients in new product launches with immune health functional claims – **standing out is possible through the use of biotics or by leveraging added-value versions** of these commonly used ingredients

**CEE supplement launches with immune health functional claims, split by ingredient**



Source: Mintel GNPD, September 2023



# launched by leaders

- **global and CEE companies are standing out** through the use of probiotics, added-value ingredients, multifunctional products, user-friendly product formats, and specific or combined product positioning



## Nature Made, USA

Based on Epicor®, and vitamins D3 and C.

Launched in 2022.



## Menarini, FRA

Based on Synbalance® (branded probiotic blend), FOS, vitamins and minerals (C, D3, B, zinc, iron, copper) in a double sachet form.

Launched in 2022.



## Olimp Labs, POL

Lozenges based on vitamin D3 and Pureway-C®.

Launched in 2022.



## Sanofi, ITA

Based on vitamins A, B6, B9, B12, C, and D, zinc, copper, iron and selenium.

Positioned for immunity + fatigue. Launched in 2022.

**Continued category growth and a need to stand out in the crowded segment indicate an opportunity for added-value ingredients in immune health products globally and in the CEE region.**



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