



hermes consilium



healthy ageing.

market data on a
top priority for consumers



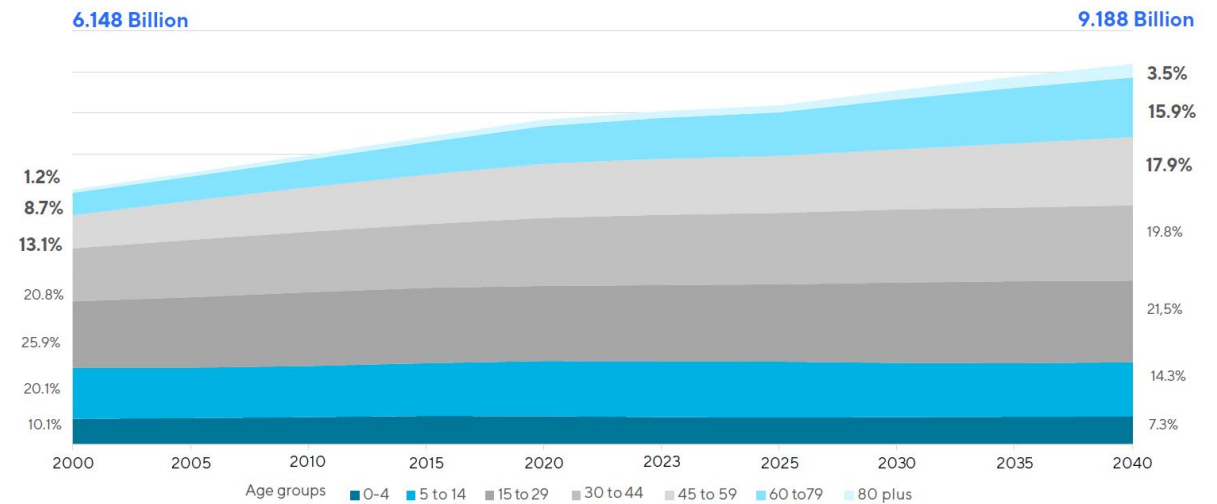
In 2030 over 1,4 billion people globally will be over 60 years old.

**That is
272,6 million more
than in 2023.**

longevity trend

- **the pandemic has driven a shift in awareness** and younger consumers are more concerned than ever about preserving their wellness for a healthier future
- **despite the global trend of increasing life span** the gap between life expectancy and years spent in good health remains
- **healthy ageing can be addressed** with dietary supplement products in categories such as bone, eye, digestive, and heart health, immune system, joints, memory, beauty, and women's health

World population – age group forecasts

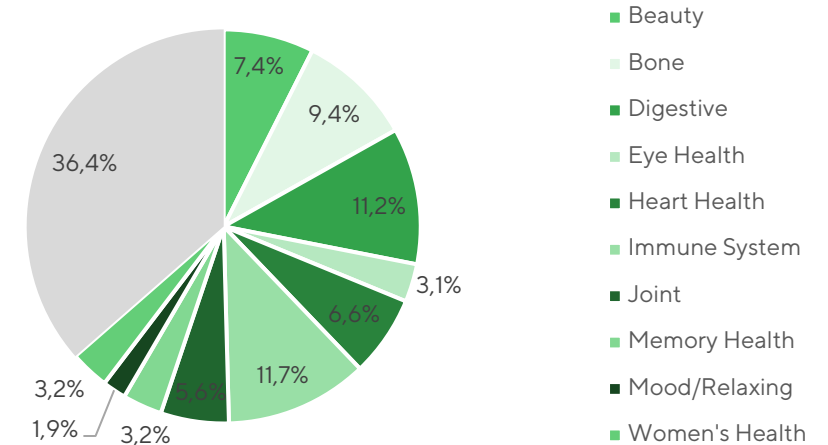


Source: Nielsen Consumer LLC, United Nations Population prospects – Median variant, 2023

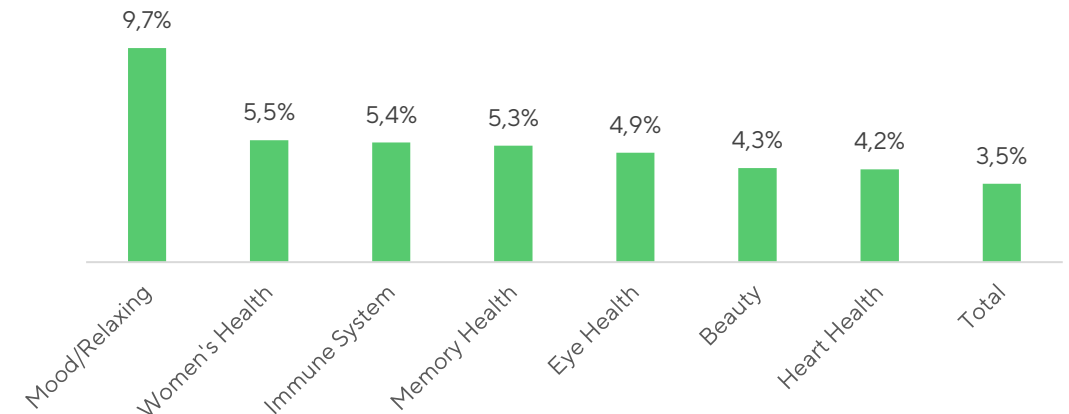
global market growth

- dietary supplement categories that address healthy ageing (beauty, bone, digestive, eye, and heart health, immune system, joints, memory health, mood/relaxing, and women's health) **represented around 2/3 of the total dietary supplement market** in 2023
- several of these categories have been **growing faster than the total dietary supplement average** in the past 6 years

Global dietary supplements market share



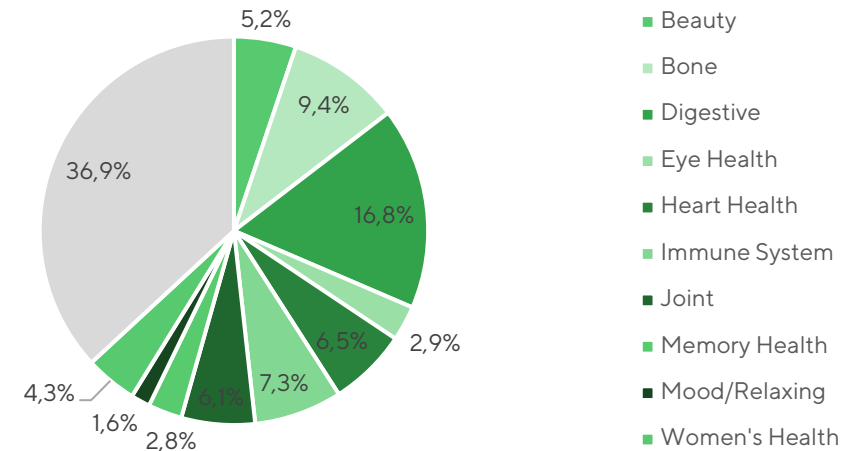
Global dietary supplements growth by category (CAGR 2018-23)



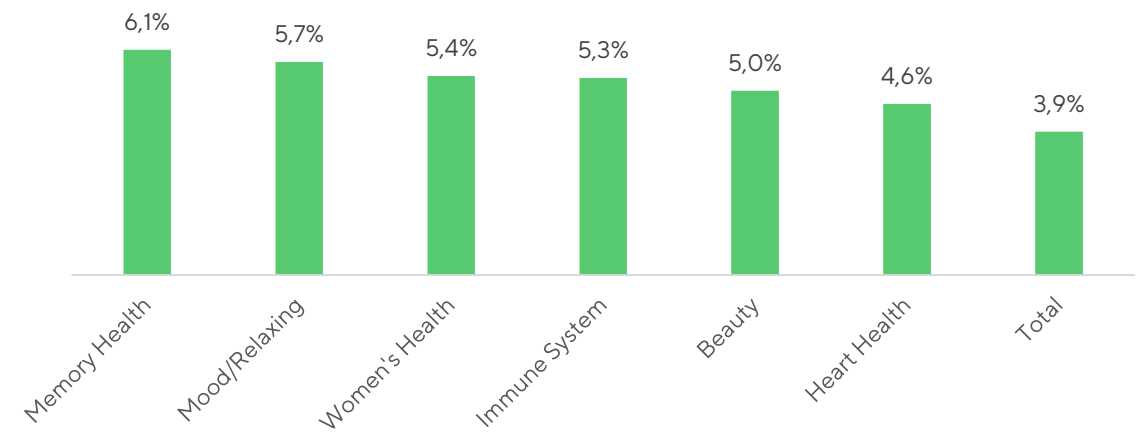
CEE market trends

- the gap between life expectancy and years spent in good health in the EU is 11 years on average
- similar to global trends, the dietary supplement categories connected to healthy ageing represent about 2/3 of the total dietary supplement market in the CEE countries
- several of these categories have been growing faster than the total CEE dietary supplement average in the past 6 years

CEE dietary supplements market share



CEE dietary supplements growth by category (CAGR 2018-23)



Source: Euromonitor International, November 2023

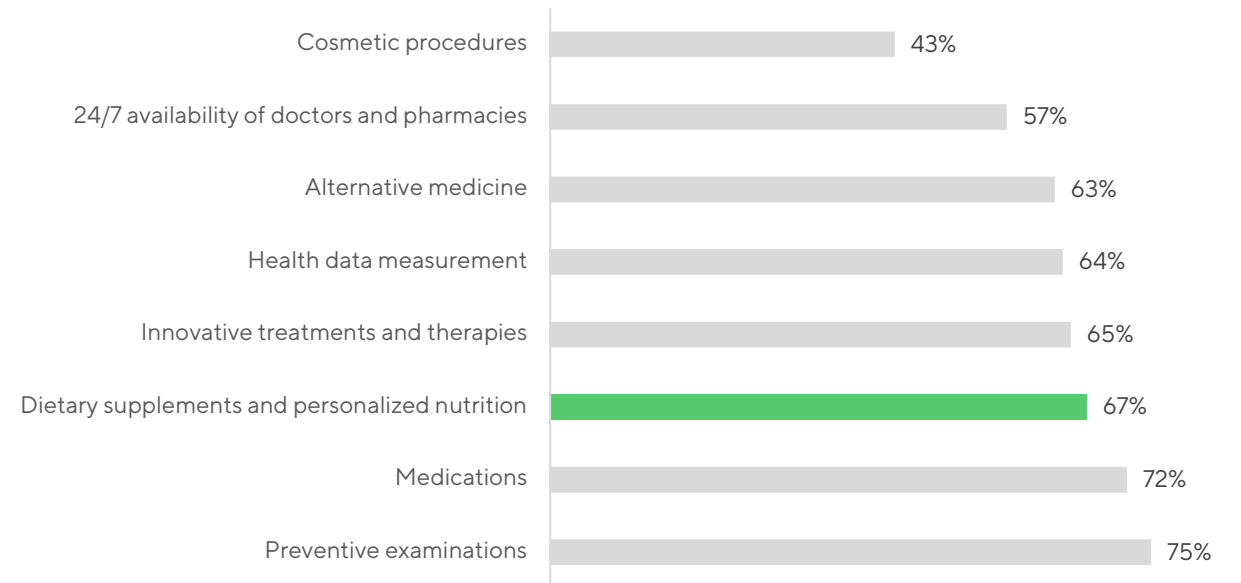
**Over a third of global
consumers consider it
very important
to live over 85 years old.**

Source: Roland Berger, Future of Health study, 2023

consumer concerns

- consumers are becoming more proactive in nutritional health management (Vitafoods Insights)
- in order to live a healthier life, **67% of global consumers are willing to pay** for dietary supplements and personalized nutrition, even if the service is not covered by health insurance
- **38% of** Roland Berger's study respondents consider it "very important" to live longer than 85 years old

Would you be willing to pay for the following services to contribute to a healthier lifestyle, even if your health insurance does not cover them in full?



Source: Roland Berger, Future of Health study, 2023

product trends

- leading brands, such as Voltaren (Haleon), are increasingly **communicating the promotion of healthy ageing** on their products
- global and CEE brands are **launching products that promote healthy ageing** based on clinically studied, branded ingredients



Voltaren, US

Supplements for protecting joint tissue and cartilage, promoting healthy inflammatory responses after exercise, and supporting healthy ageing.

Launched in 2023.



Dr. Loges, GER

A unique joint-cartilage formula for mobility and agility.

Launched in 2022.



Innventa, SER

Product that contributes to the protection of nerve cells, optimization of cognitive functions, and the improvement of quality of life

Launched in 2023.



Medex, SLO

A formula for slowing down biological ageing and elongation of the healthy period.

Launched in 2023.

The rising ageing population and increasing consumer concern about preserving their wellness present an opportunity for added-value ingredients in products that assist with healthy ageing globally and in the CEE region.



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