



hermes consilium



cognition

market data on the fastest-
growing supplement
category

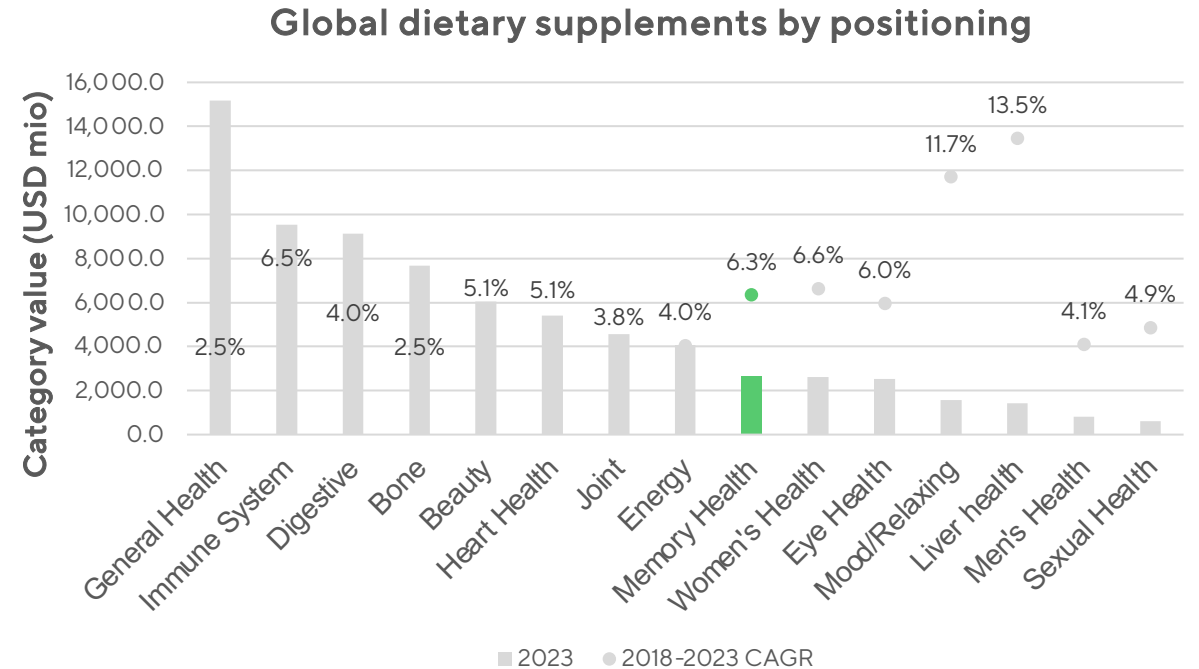




**Cognition is among
the top health areas
consumers wish to
improve.**

global market growth

- globally, **memory health** is among niche categories
- **the category is among fast-growing**, and it has grown faster than the total dietary supplement average (4,3%) in the recent years (2018-2023)

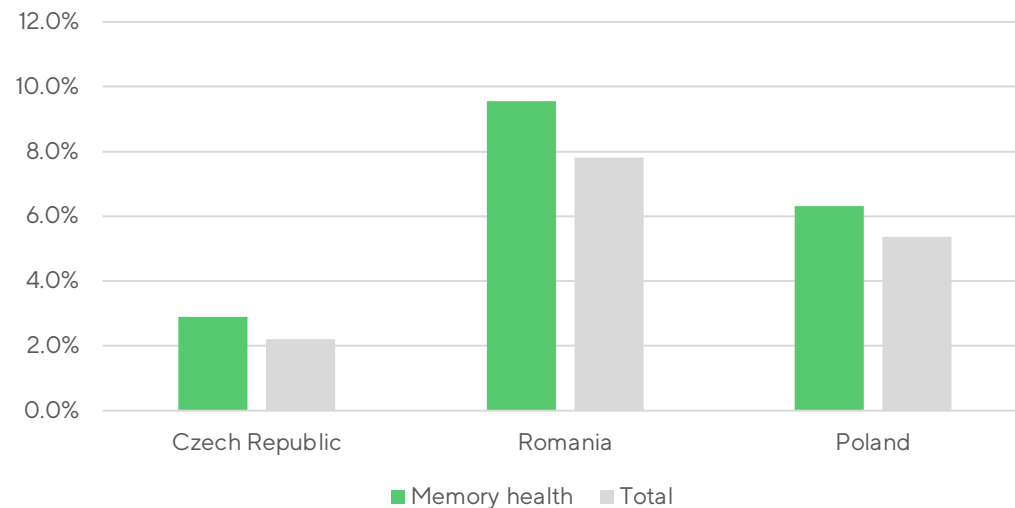


Source: Euromonitor International, January 2024

CEE market growth

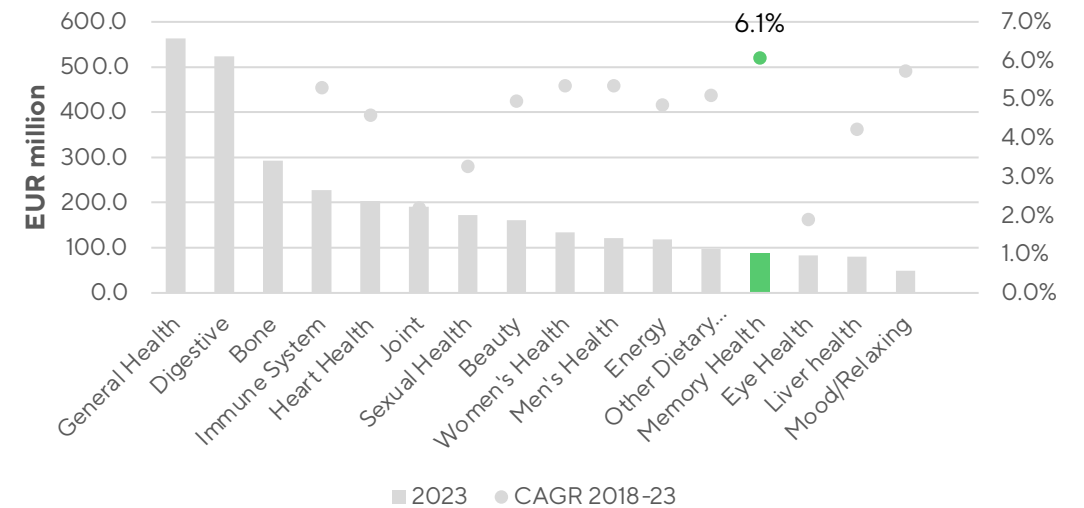
- memory health category has been growing faster than the total dietary supplement average in several CEE countries in the past 6 years

Dietary supplements growth (CAGR 2018-23)



- although the category is still very niche, it was the fastest growing category between 2018 and 2023 in the region

Eastern European dietary supplements category growth



consumer concerns

61%

of Polish consumers

state they recognize the link between cognitive health and overall health

34%

have taken nutritional supplements over the last 12 months to improve their cognitive health



When asked about their motivation to enhance cognitive health, 48% of global consumers express a desire to enhance their overall quality of life. Individuals focusing on cognitive wellness expressed intentions to reduce alcohol consumption and increase their intake of nutritional supplements.

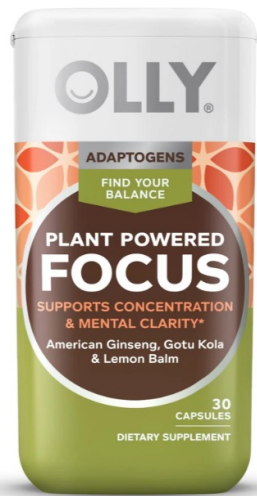
market potential

- **brain health and migraine prevention** are increasingly stepping into focus, with brands such as Haleon launching supplement products in the space
- **brands are recognizing the trend** - in July 2023, Gnosis by Lesaffre announced that they will be **studying MenaQ7® for its potential to prevent migraines** in a 6-month lasting clinical trial
- this came as a result of the finding that **migraine sufferers had** significantly higher arterial stiffness and **vitamin K2 deficiency**



premium segment development

- **leading brands are launching** cognition products addressing memory and focus



Oilly USA
American ginseng, gotu kola, lemon balm.
Vegetarian capsules.
Supports concentration & mental clarity
Launched in 2023



Holland & Barrett UK
Neumentix™, Ginseng, bacopa, B vitamins
Focusing more on energy and focus after a poor night's sleep.
Launched in 2022



GNC USA
Nutricog™, Cereboost™ (ginseng), Extramel® (melon pulp)
Launched in 2023



Nature's Way USA
Cognigrape®, B6, B12 gummies. Support short-term memory and concentration.
Launched in 2023



Forte Pharma FRA
Multivitamins and minerals for memory and concentration
Launched in 2023

Increasing consumer interest in brain health supplements and increased recognition for clinical support in the segment present a clear market opportunity for clinically studied branded ingredients in the CEE region.



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