



hermes consilium



# stress and sleep.

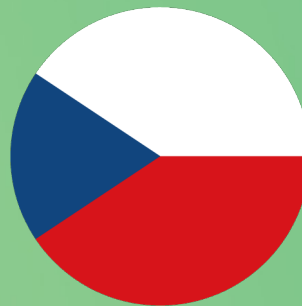
market data on  
a persisting trend



Although niche, stress & sleep is among the fastest-growing dietary supplement categories in the recent years.



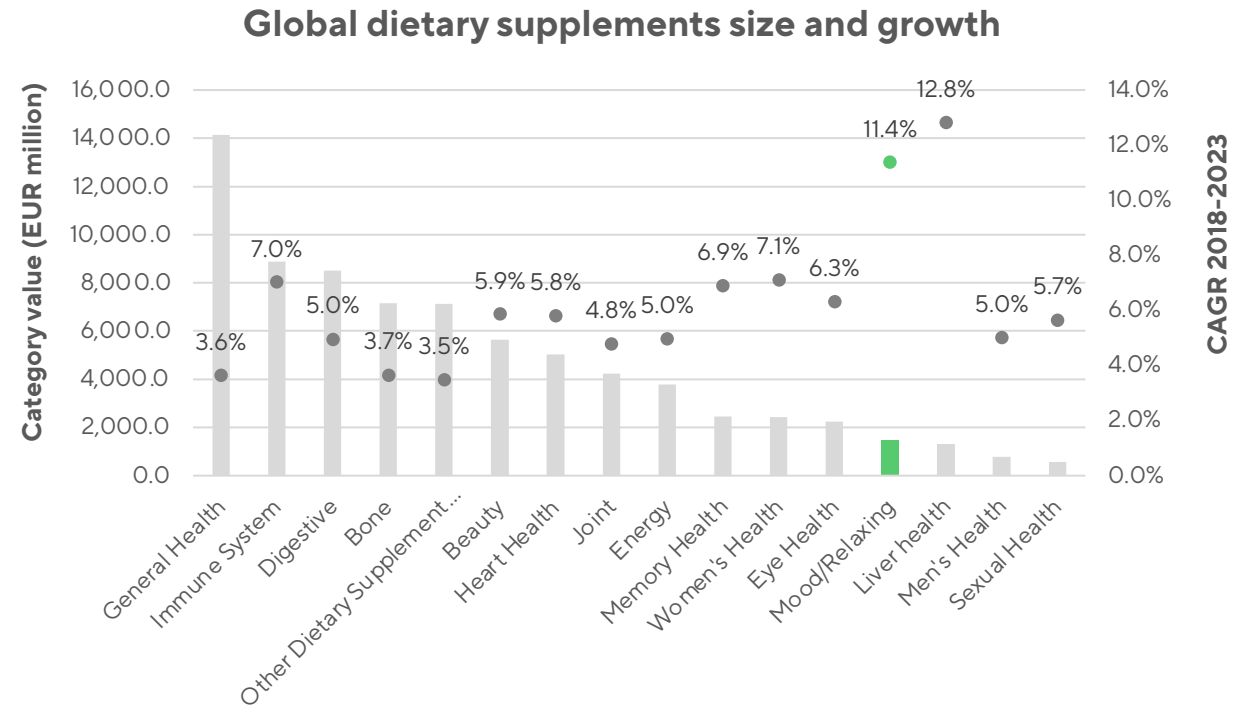
**7,6%**  
CAGR 2018-23



**4,5%**  
CAGR 2018-23

# global market growth

- mood/relaxing dietary supplements are the **2<sup>nd</sup> fastest-growing supplement category** of the past 6 years
- **the global share of new products** with stress & sleep functional claims grew from 3,4% in 2018 of total new dietary supplement products to 4,3% in 2023 (Mintel GNPD)

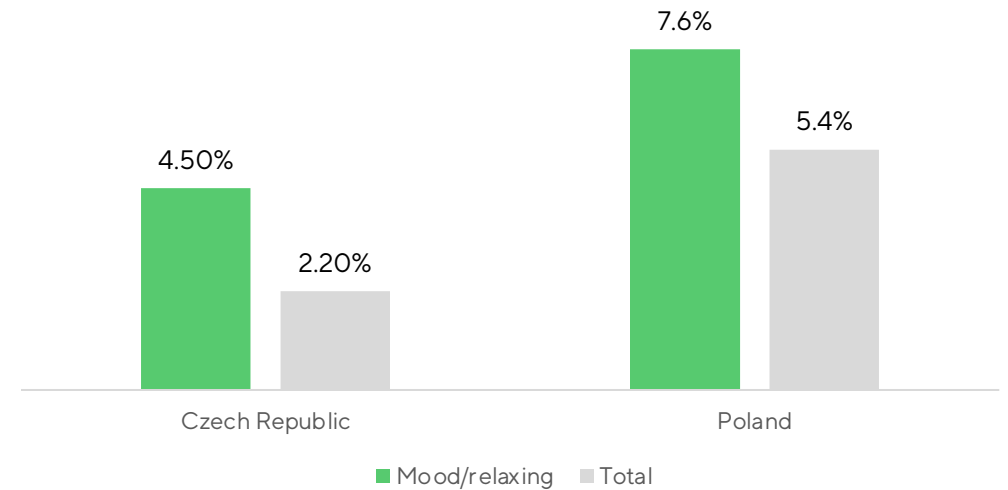


Source: Euromonitor International, March 2024

# CEE market growth

- similar to global growth, in Eastern Europe, mood/relaxing was **the 2<sup>nd</sup> fastest-growing** dietary supplement category from 2018 – 2023
- the category has been **growing faster than the total dietary supplement average** in several countries in the CEE region for the past 6 years

Eastern European dietary supplements growth  
(CAGR 2018-23)

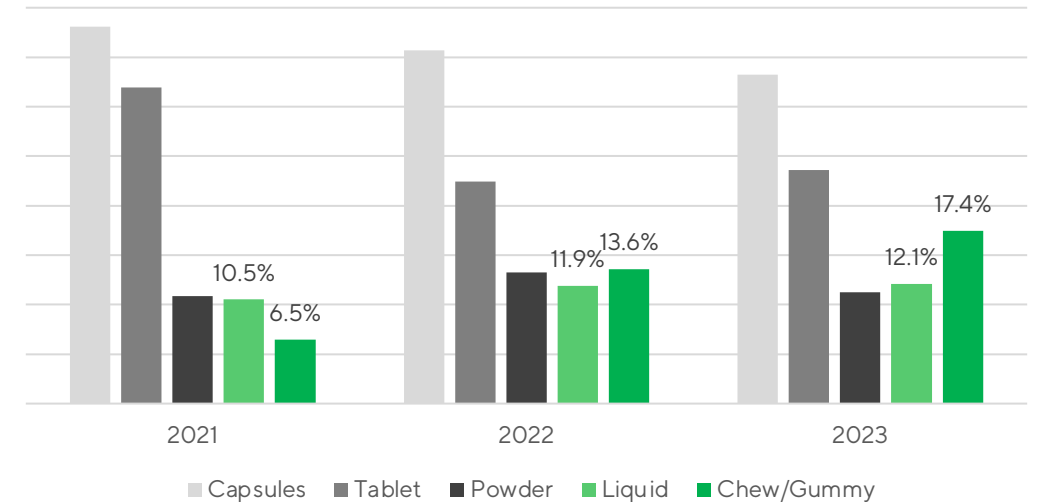


Source: Euromonitor International, March 2024

# market trends

- the popularity of liquid and chewable formats among stress and sleep products is growing
- brands are increasingly connecting their products to technology
- leading brands, such as Bayer, are increasingly communicating the improvement of several sleep quality parameters on their products

Stress and sleep VMS launches by format



Source: Mintel GNPD, March 2024

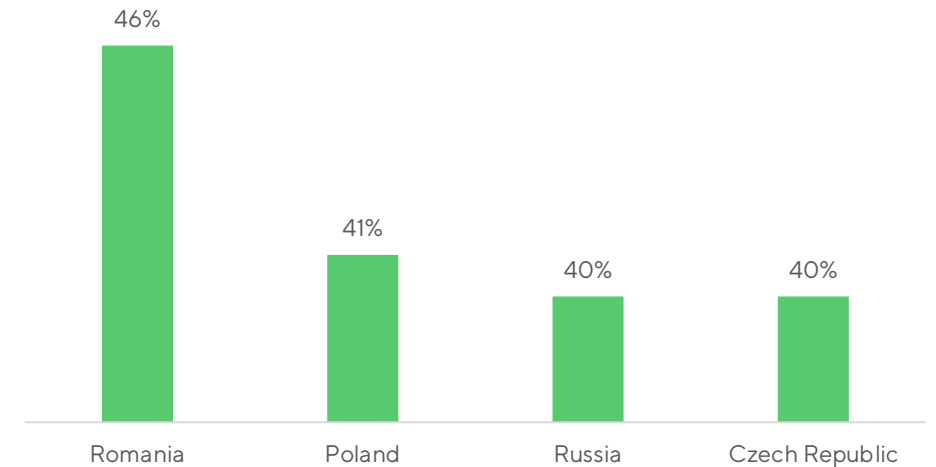
**In the next 12 months,  
consumers will prioritize  
their mood to alleviate stress,  
improve sleep hygiene, and  
relax more.**

Source: FMCG Gurus Trend Digest, January 2024

# consumer concerns

- stress and sleeping disorders have been in the **top 3 consumer health concerns** in the past years (Euromonitor)
- **consumers now define health** as mental and emotional well-being, getting enough sleep, and feeling “good” (Euromonitor)
- 37% of European consumers said their **stress levels became worse** during the pandemic, this number is even higher in the CEE countries
- 59% of Europeans say they experienced or **felt close to a burn-out** (STADA)

CEE consumers' increase in stress since COVID



Source: STADA Health Report, 2022

# launched by leaders

- **growth typically brings the development** of the premium segment, with products based on branded and clinically studied ingredients with advanced delivery systems



## Arkopharma, FRA

Sleep gummies based on poppy petals concentrate with a consumer study on the finished product. Launched in 2023.



## Misling, CRO

Stress capsules based on Howaru® Calm strain, magnesium, and vitamin B6. Launched in 2023.



## STADA, several markets

Duo capsules with delayed-release technology for sleep based on lavender, passionflower, melatonin, and vitamin B6. Launched in 2022 in Bulgaria, Hungary, Czech Republic, and Croatia.



## Sun Wave Pharma, ROM

Tablets for stress based on KSM-66®, rhodiola, magnesium, and vitamin B6. Launched in 2023.



Recent global and CEE market trends indicate **sleep and stress products with clinically studied branded ingredients** may present a promising market opportunity in the future.





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**Hermes Consilium Ltd.**

[www.hermes-consilium.com](http://www.hermes-consilium.com) | [info@hermes-consilium.com](mailto:info@hermes-consilium.com) | +386 1 434 56 78  
Cesta v Mestni log 88a, 1000 Ljubljana, SI - European Union