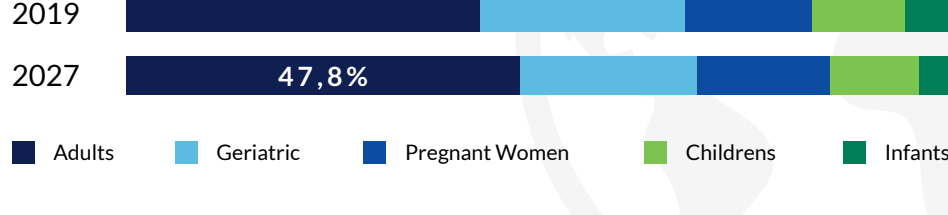


Worldwide^{1,2}

WHO

End-user Movement Analysis & Market Share, 2019 & 2027



WHERE

Regional movement & market share analysis, 2019 & 2027



WHAT KIND OF SUPPLEMENTS

Application Movement Analysis & Market Share, 2019 & 2027



What about the pandemic Covid-19³

2014 - 2019

Vitamins and dietary supplements growth rate of 6%

Global consumers reached to vitamins and dietary supplements to meet both acute and general health concerns, and prevention, nutrition and wellness became universal needs with COVID-19 front of mind. Global growth accelerates from 5,1% in 2019 to over 9,7% for full-year 2020.

BEFORE COVID 19

Global demand = vitamins and dietary supplements related to aging:

Glucosamine (for joint health), probiotics (for digestion), eye health products and general health-oriented products like multi-ingredient tonics. Specific demand in Asia for children's products (multivitamins, probiotics).

WITH COVID-19

Global demand = vitamins and dietary supplements positioned around immunity:

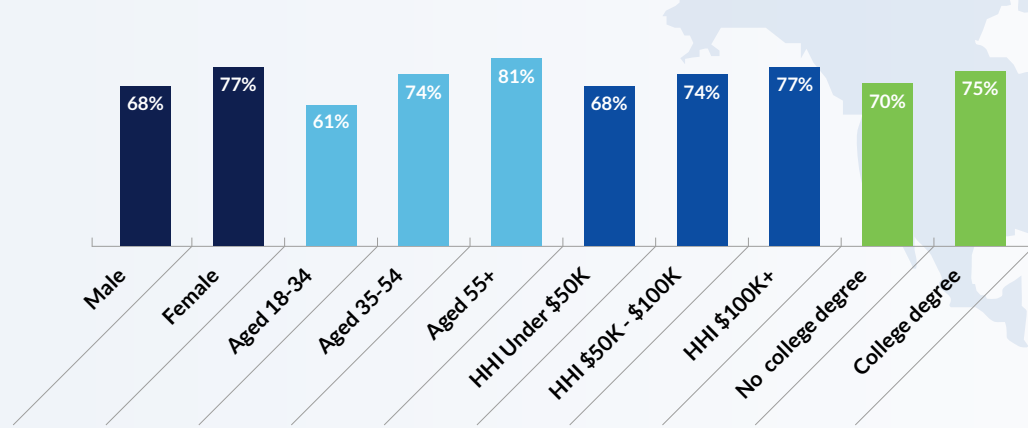
Vitamin C, vitamin D, echinacea, ginseng, probiotics, as well as general health products like basic multis.

e-commerce = 21% of global vitamins and dietary supplement sales in 2020 compared to 17% in 2019.

North America^{2,4}

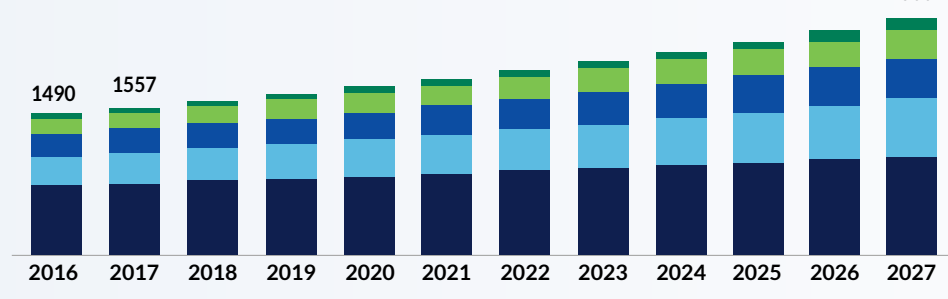
WHO

Who takes dietary supplements?

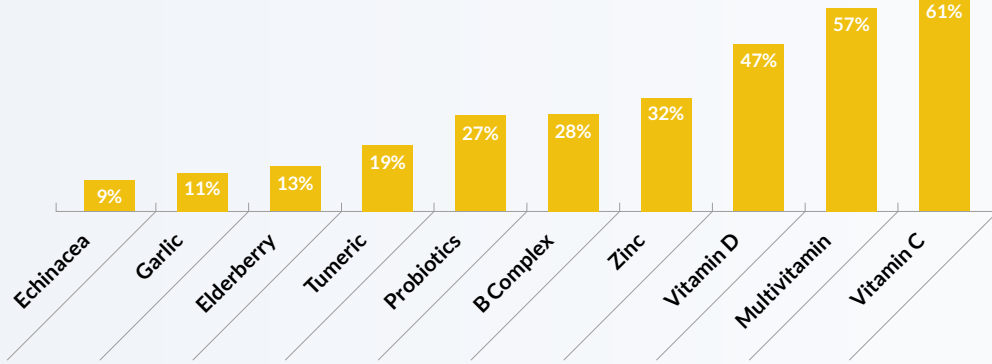


GROWING EVOLUTION & FORECAST

North America dietary supplements market estimates and forecasts, by end-user, 2016-2027, (USD Million)

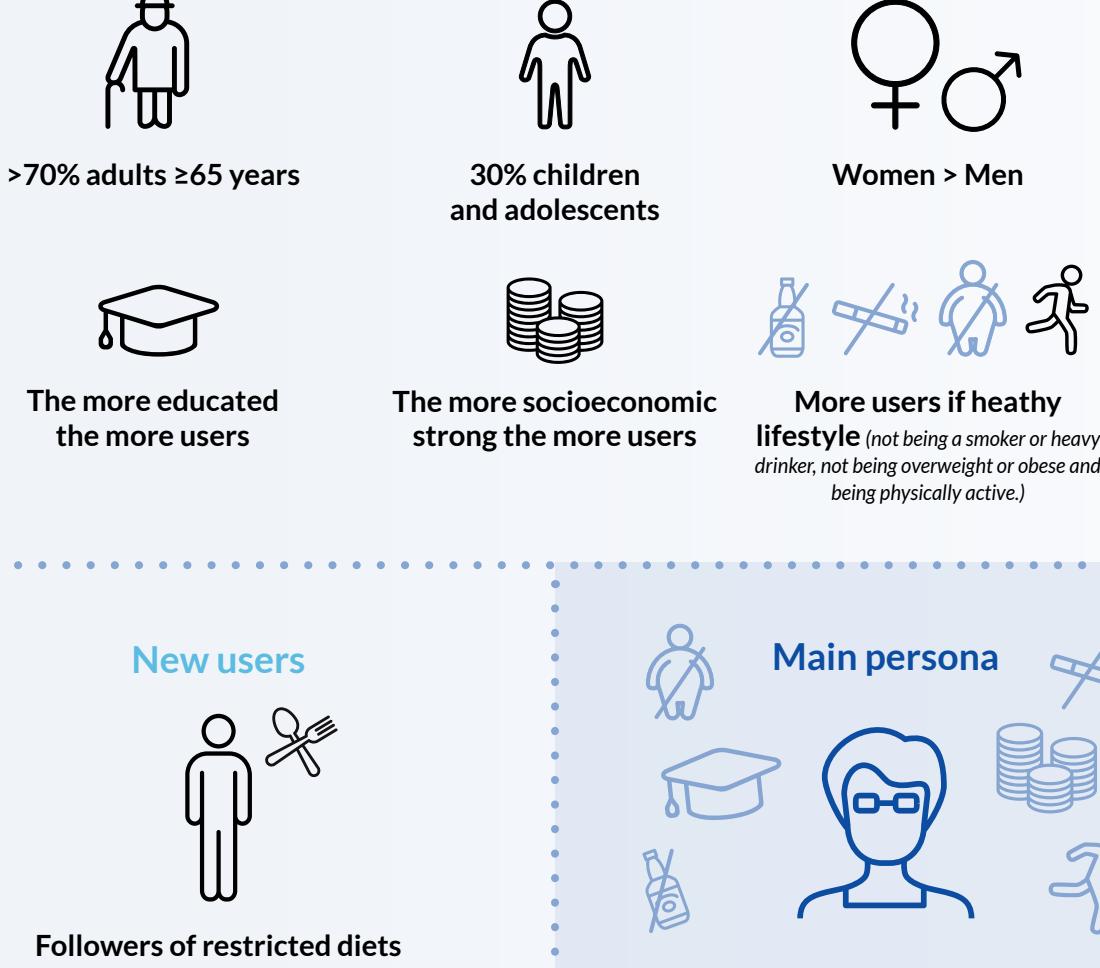


TOP 10 INGREDIENTS FOR IMMUNITY



SUMMARY

Users of dietary supplements



Europe^{5,6}

MARKET

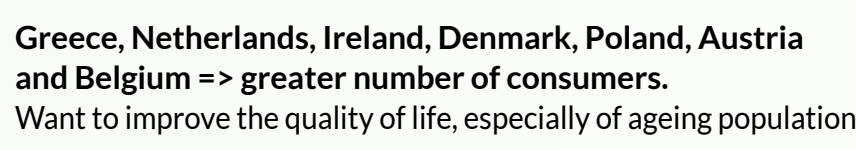
14,95 billion USD in 2019
33,80 billion expected in 2027 (growth of 9,3% 2020-2027)

divided into the UK, Germany, Italy, France, Spain and the rest of Europe.

UK annual growth rate = 9,7% during 2020-2026

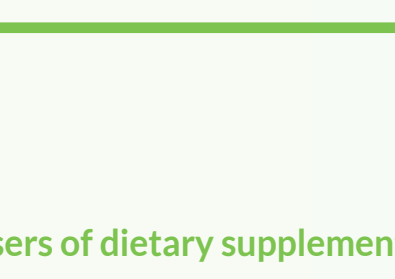
POSITIVE PERSPECTIVES

Greece, Netherlands, Ireland, Denmark, Poland, Austria and Belgium => greater number of consumers. Want to improve the quality of life, especially of ageing population

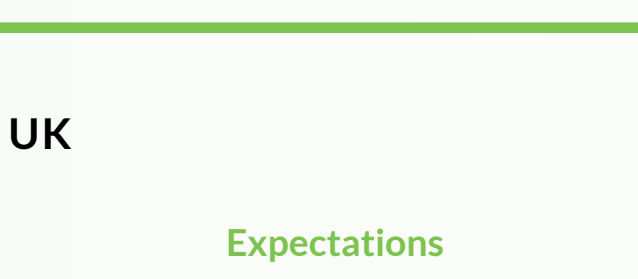


UK

Users of dietary supplements



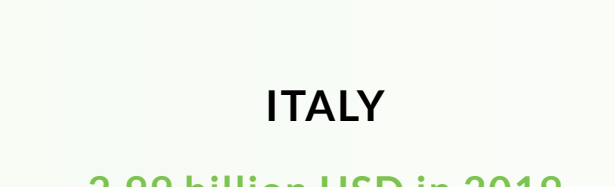
Expectations



ITALY

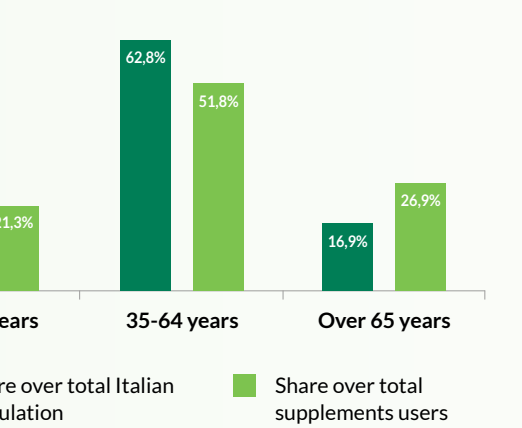
2,99 billion USD in 2019 Predominant country in Europe

Users of dietary supplements



Segmentation

Europe Dietary Supplements Market Share, By Type, 2019



Sources:

- <https://www.newhope.com/market-data-and-analysis/dietary-supplements-2020-global-perspective>
- ICIS, FDA, Nutringredients, Nutraceuticals World, D&B Hoovers, Company Annual Reports, Primary Research, Grand View Research
- www.nutritionbusinessjournal.com/2020-global-supplement-business-report
- <https://www.crnusa.org/newsroom/2020-crn-survey-reveals-focus-vitamins-and-minerals-available-purchase-consumer-survey>
- <https://www.statista.com/statistics/589452/value-dietary-supplements-markets-europe-by-country>
- <https://www.fortunebusinessinsights.com/industry-reports/europe-dietary-supplements-market-101918>