

# nutraceutical market trends for 2025

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insights by PharmaLinea & Euromonitor



# event overview.

## speakers



**MAGDA STARULA**

*Research Consultant*



**MATEVŽ AMBROŽIČ**

*Marketing Director*



## agenda

- **Magda Starula:**  
category performance  
regional analysis  
consumer insights
- **Matevž Ambrožič:**  
category deep dive  
delivery formats  
marketing strategies
- **Q&A:**  
type questions in the box

# World Market for Vitamins and Dietary Supplements

Insights by Euromonitor International

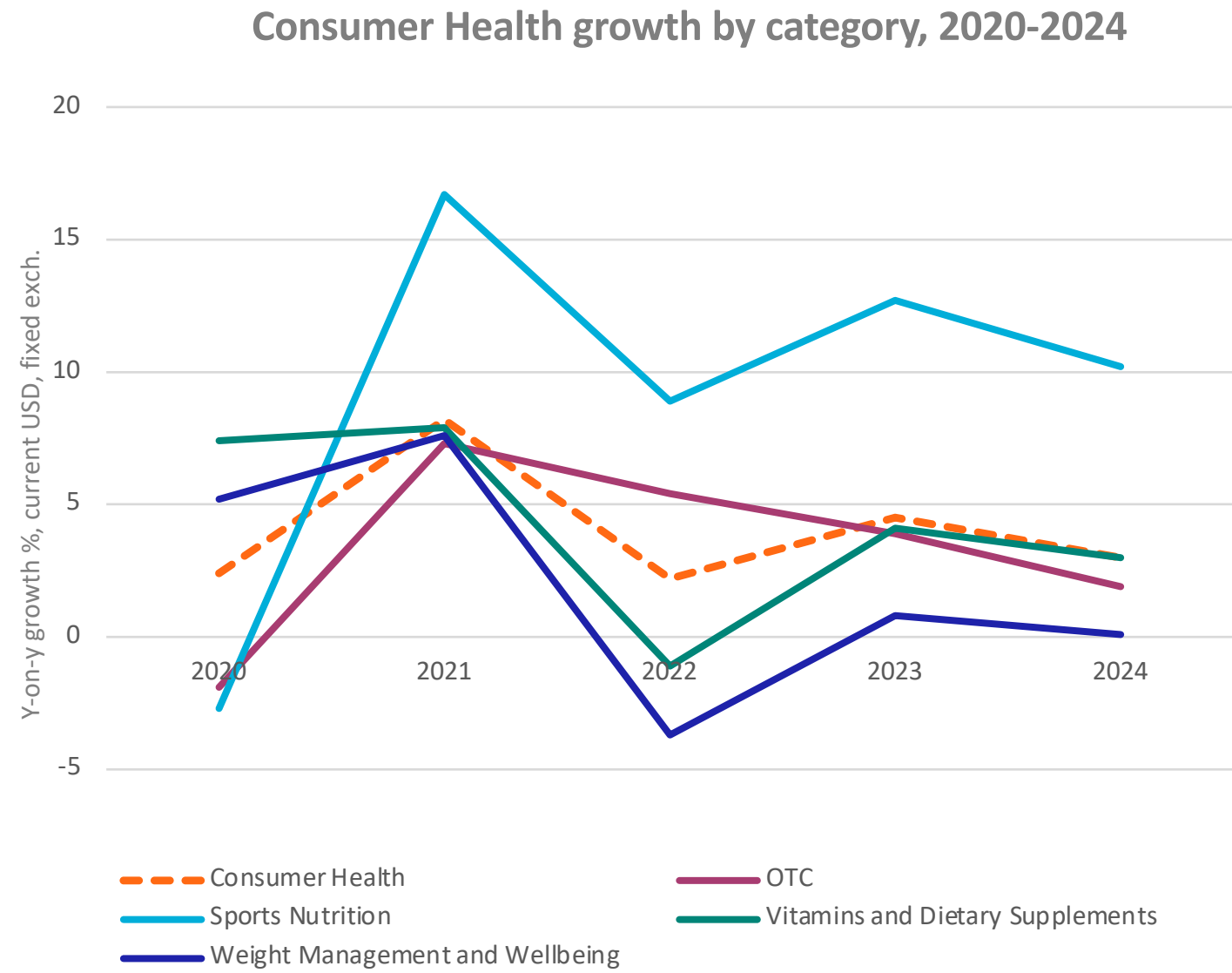
# Today's Insights

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- Overview of the global vitamins and dietary supplements marketplace
- Consumer insights and trends
- Key takeaways

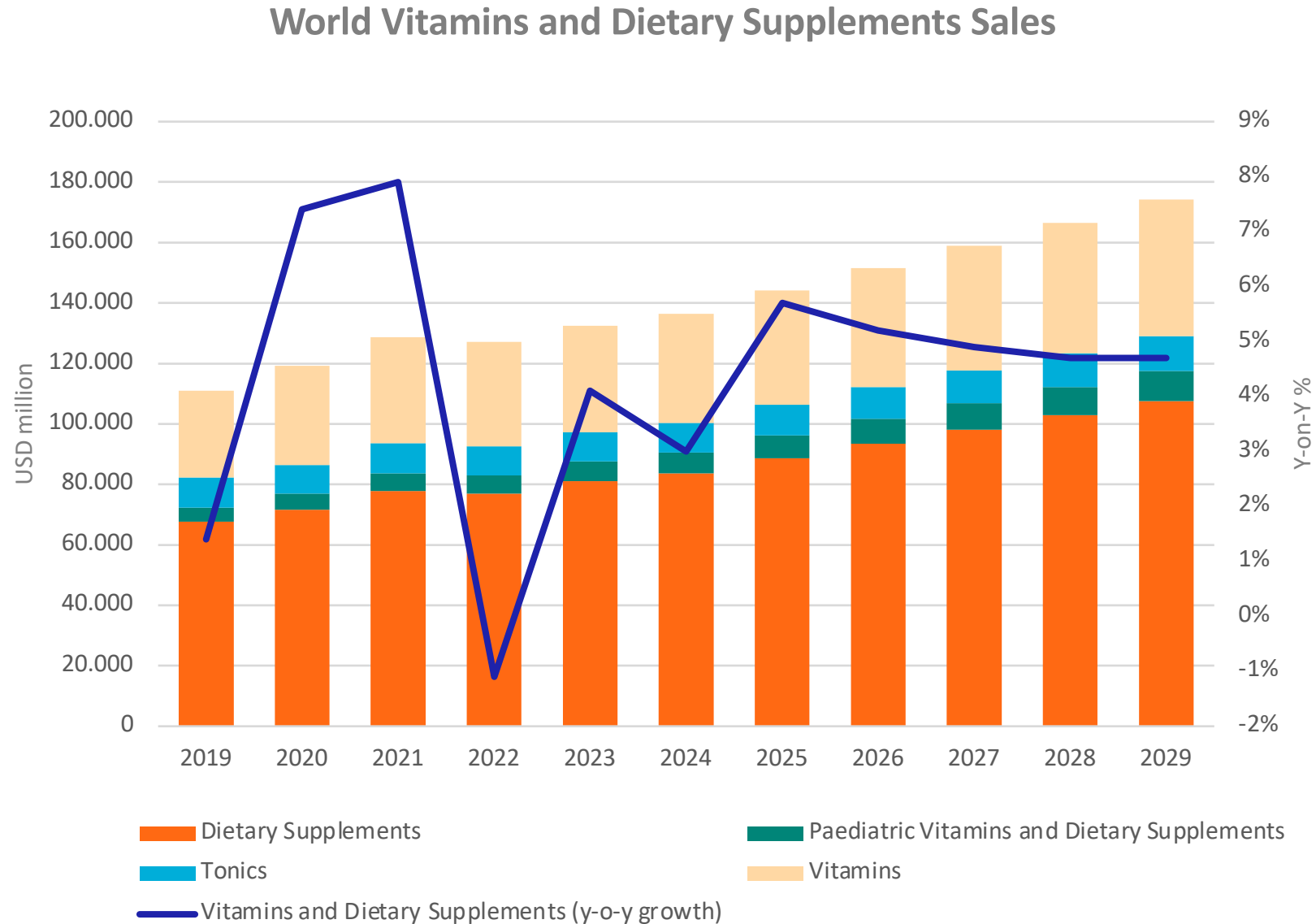


Divergent trends  
between consumer  
health categories  
continue into 2024



Source: Euromonitor International, Consumer Health

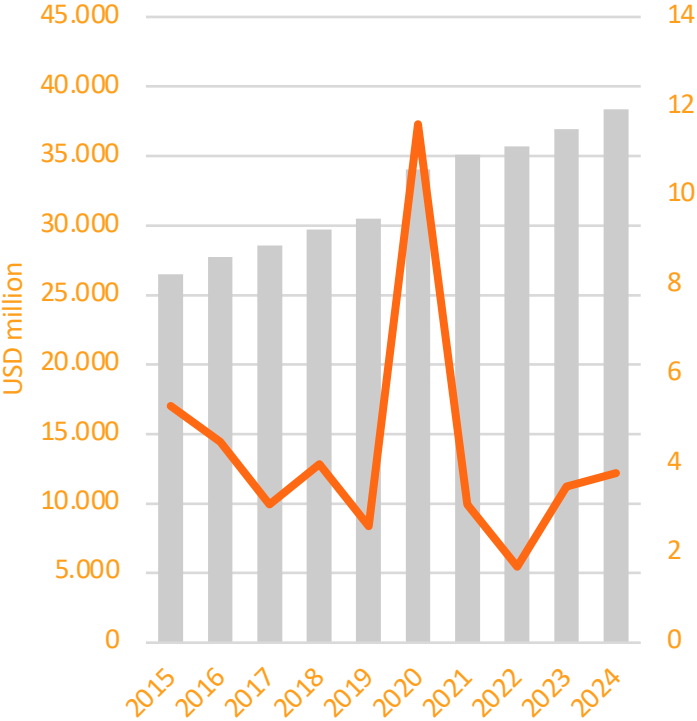
The global vitamins and dietary supplements marketplace continues to suffer from the legacy of inflation and softer consumer retention



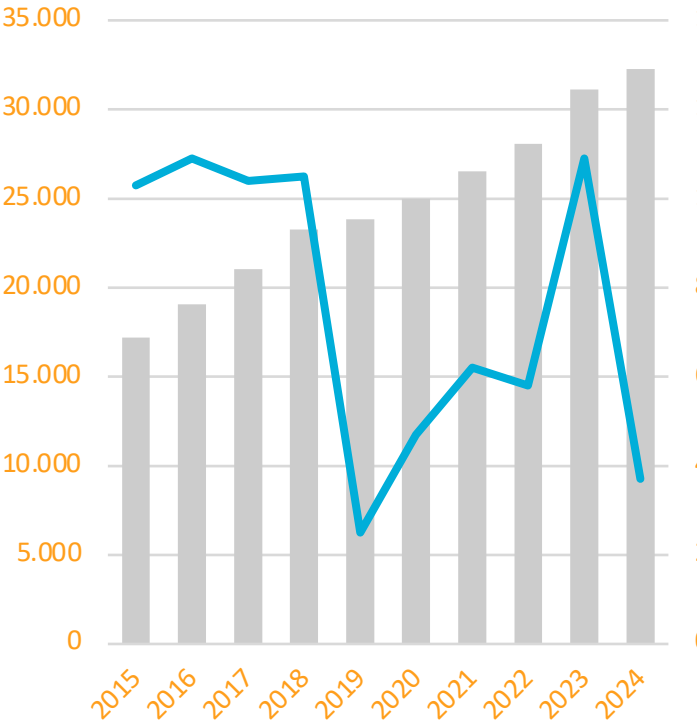
Source: Euromonitor International, Consumer Health

# Performance of vitamins and dietary supplements **varies considerably in leading markets**

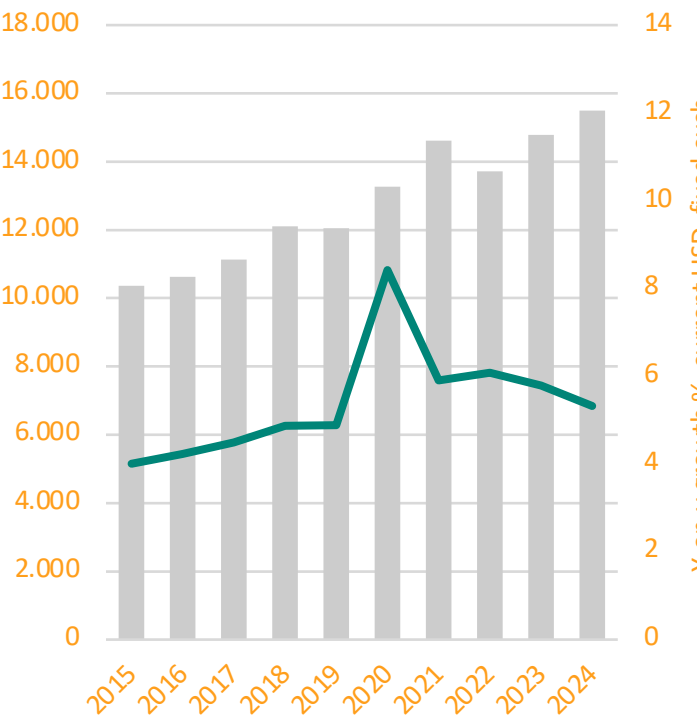
Vitamins and Dietary Supplements, United States, 2015-2024



Vitamins and Dietary Supplements, China, 2015-2024



Vitamins and Dietary Supplements, Western Europe, 2015-2024

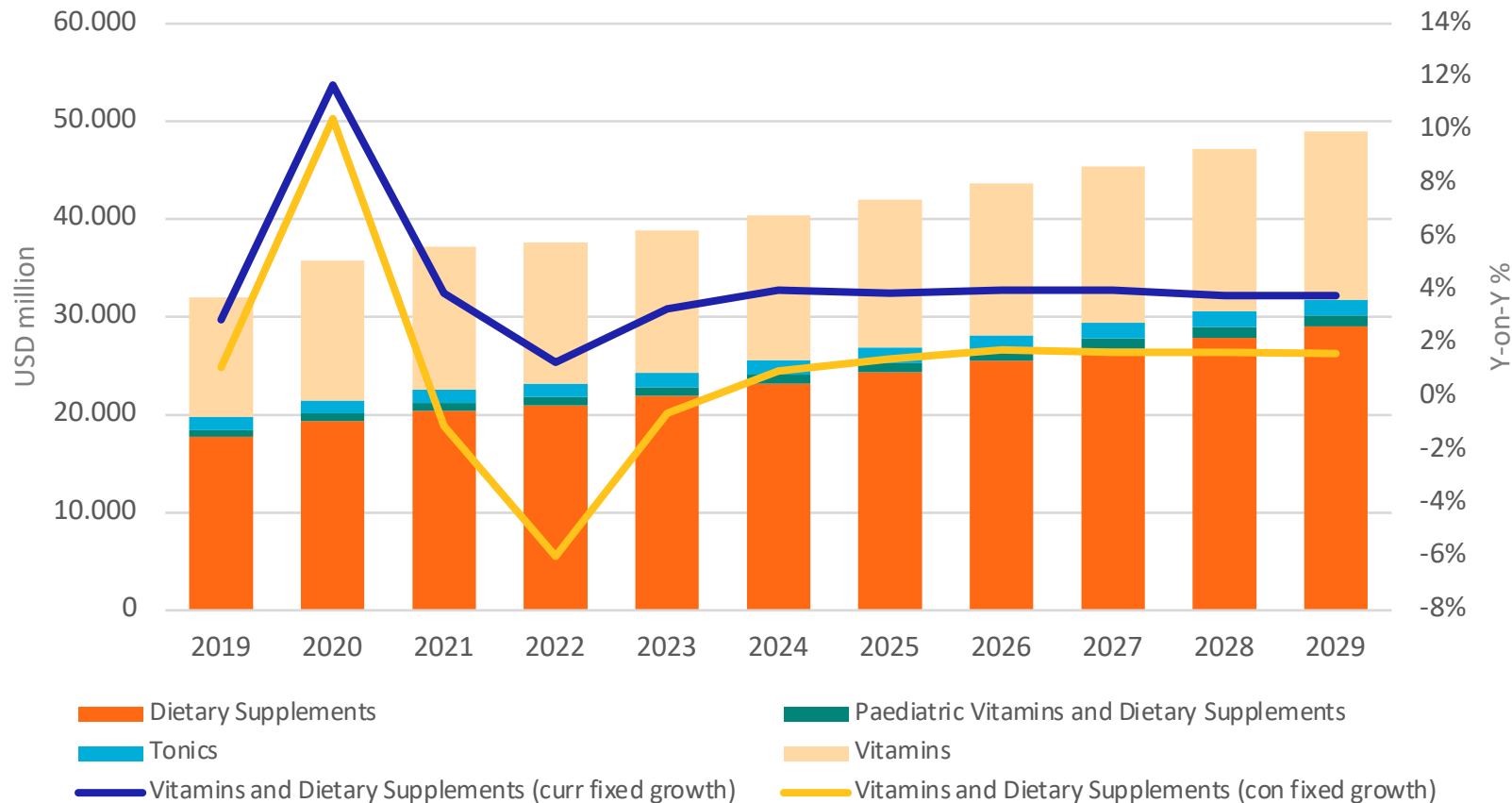


Source: Euromonitor International, Consumer Health

# Regional Spotlight: North America



## Vitamins and Dietary Supplements Sales in North America



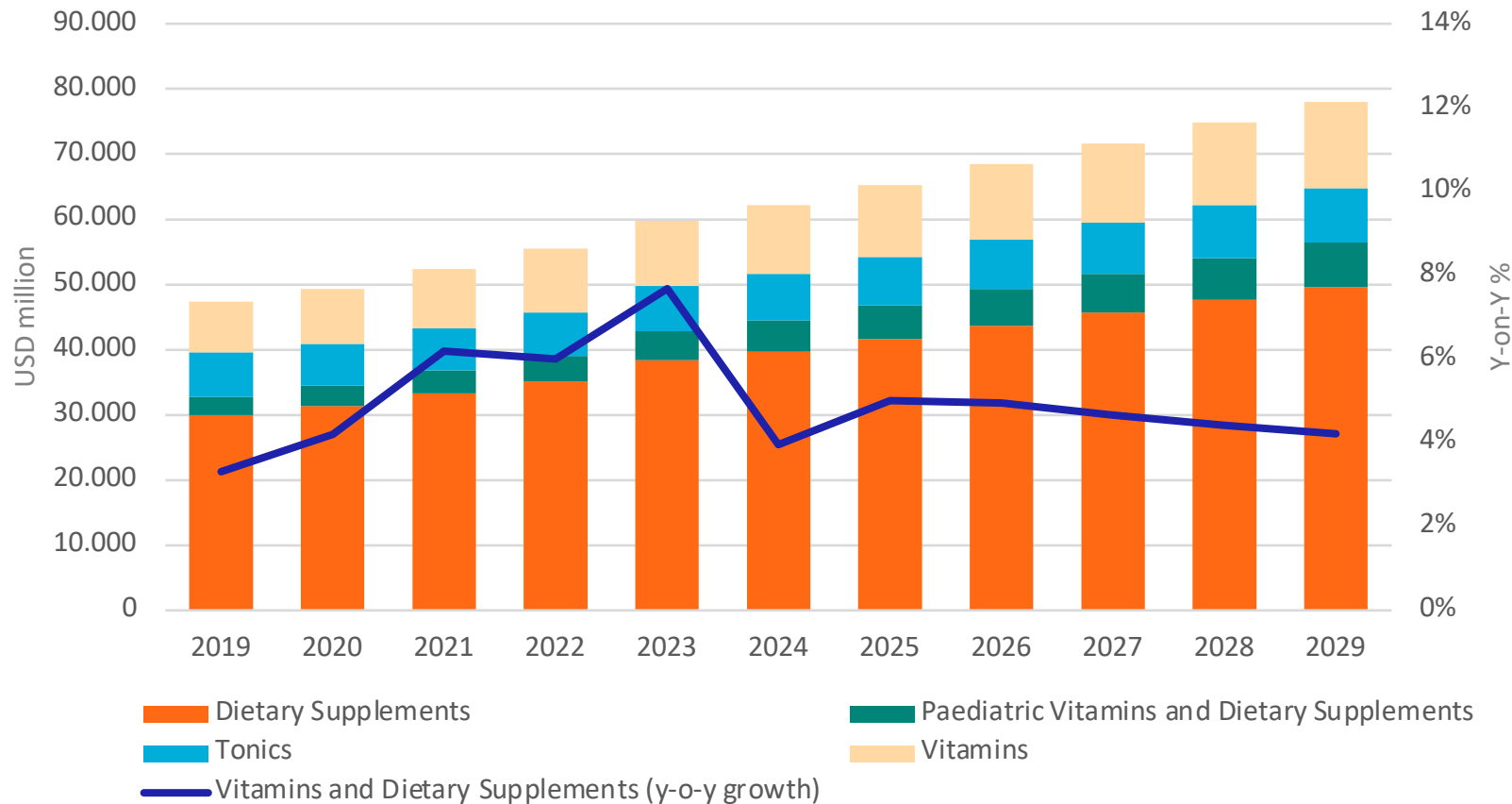
Source: Euromonitor International, Consumer Health

The US is still the leading market for VDS globally but is suffering through a multi-year period of soft organic growth

## Regional Spotlight: Asia Pacific



### Vitamins and Dietary Supplements Sales in Asia Pacific



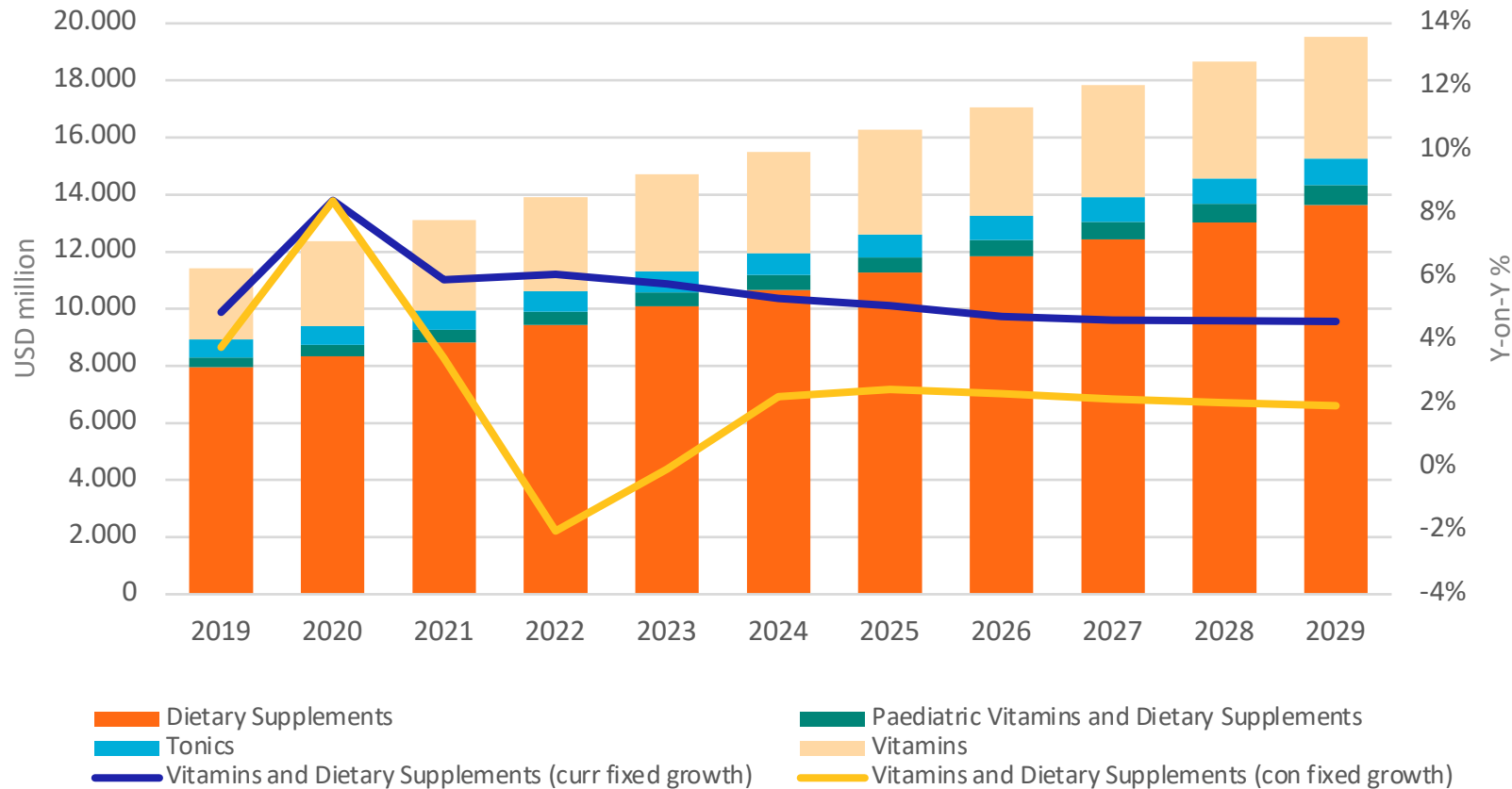
Source: Euromonitor International, Consumer Health

Asia is VDS's largest region, taking in almost 50% of category sales behind steady, broad-based growth

# Regional Spotlight: Western Europe



Vitamins and Dietary Supplements Sales in Western Europe



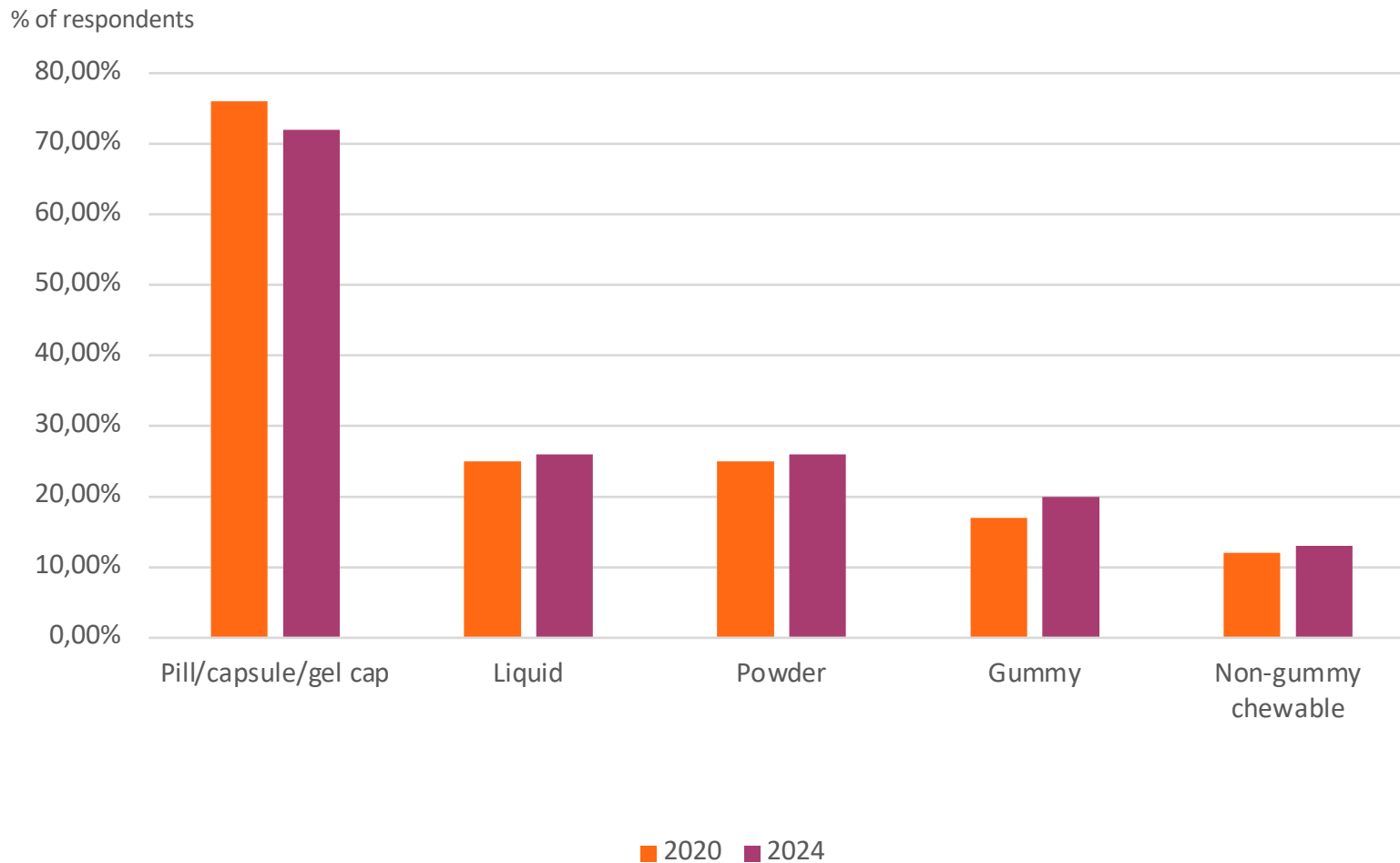
Source: Euromonitor International, Consumer Health

Western Europe emerging from a few years of negative constant value growth but represents only 11% of global sales in 2024



# Gummy Supplements with High Dynamics

What formats of vitamins and supplements do you typically take?



Innovative formats such as drink mixes, shots, gels, soft candies and bars/bites = enjoyable & engaging supplement experience <-> appearance, taste and texture associated with food and drink

Despite **setbacks**, vitamins and dietary supplements retain various areas of **opportunity** going forward

The industry has long maintained an ability to evolve and redefine itself, meet existing consumer concerns, and discover new consumer types that push category sales forward. **What are the promising areas of growth going into 2025?**

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# Consumer Insights and Trends

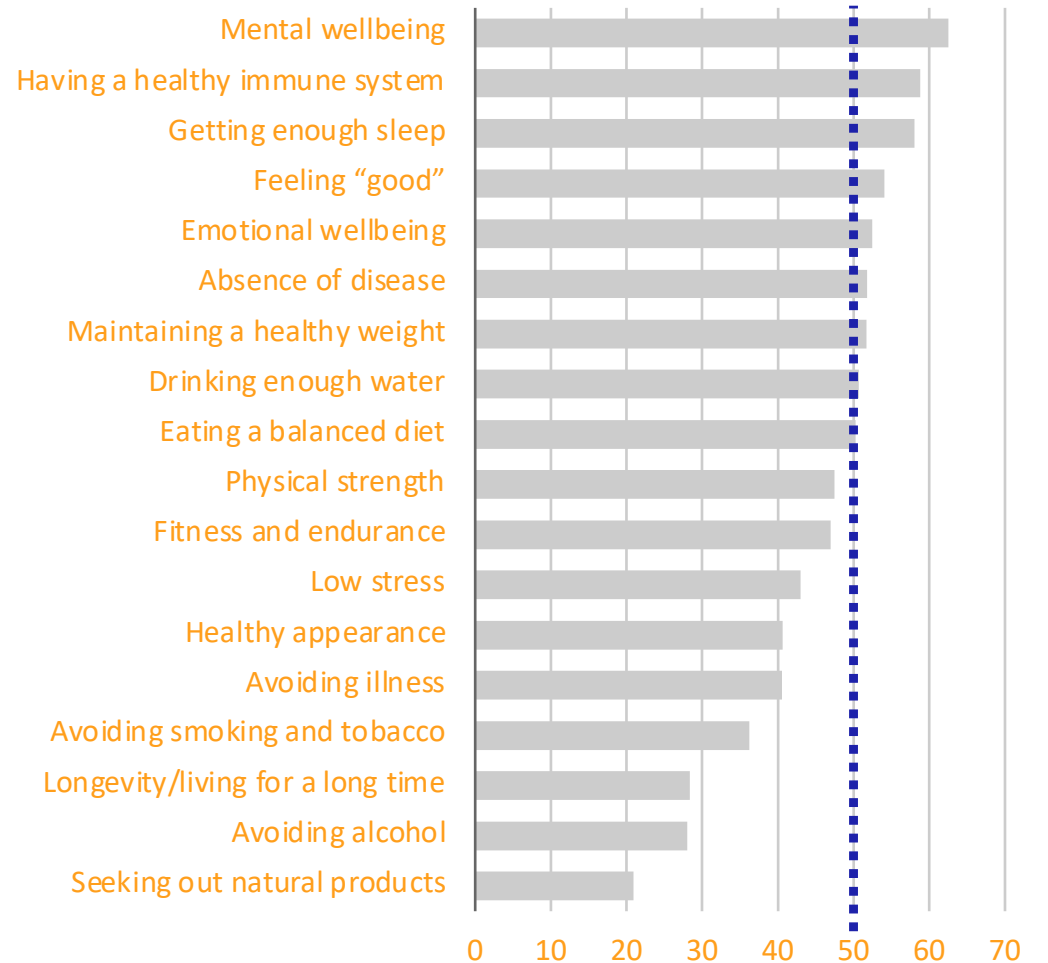


# Consumer sentiment about the nature of health is **expanding**

Consumers have an ample definition of health that is broad enough to incorporate products and approaches from across consumer goods. Most global consumers associate nine separate attributes as part of their definition of health.

## What does “being healthy” mean to you?

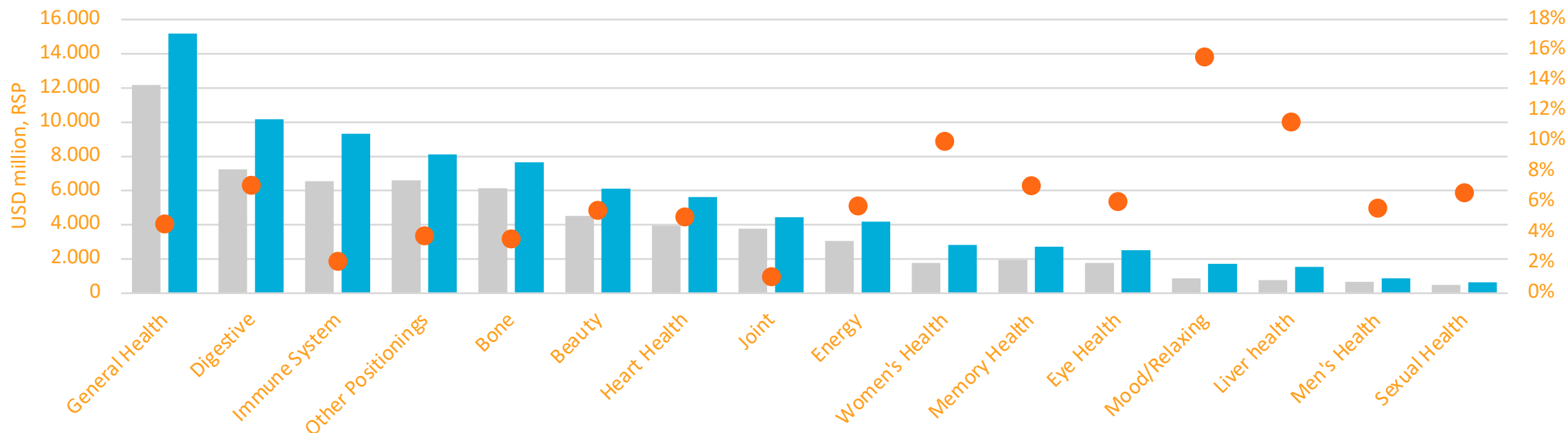
% global respondents



Source: Euromonitor Voice of the Consumer: Health and Nutrition, fielded Jan-Feb 2024

# Leading dietary supplement benefits, 2019 vs. 2024

Global Five-Year Comparison of Positioning of Dietary Supplements, 2019-2024

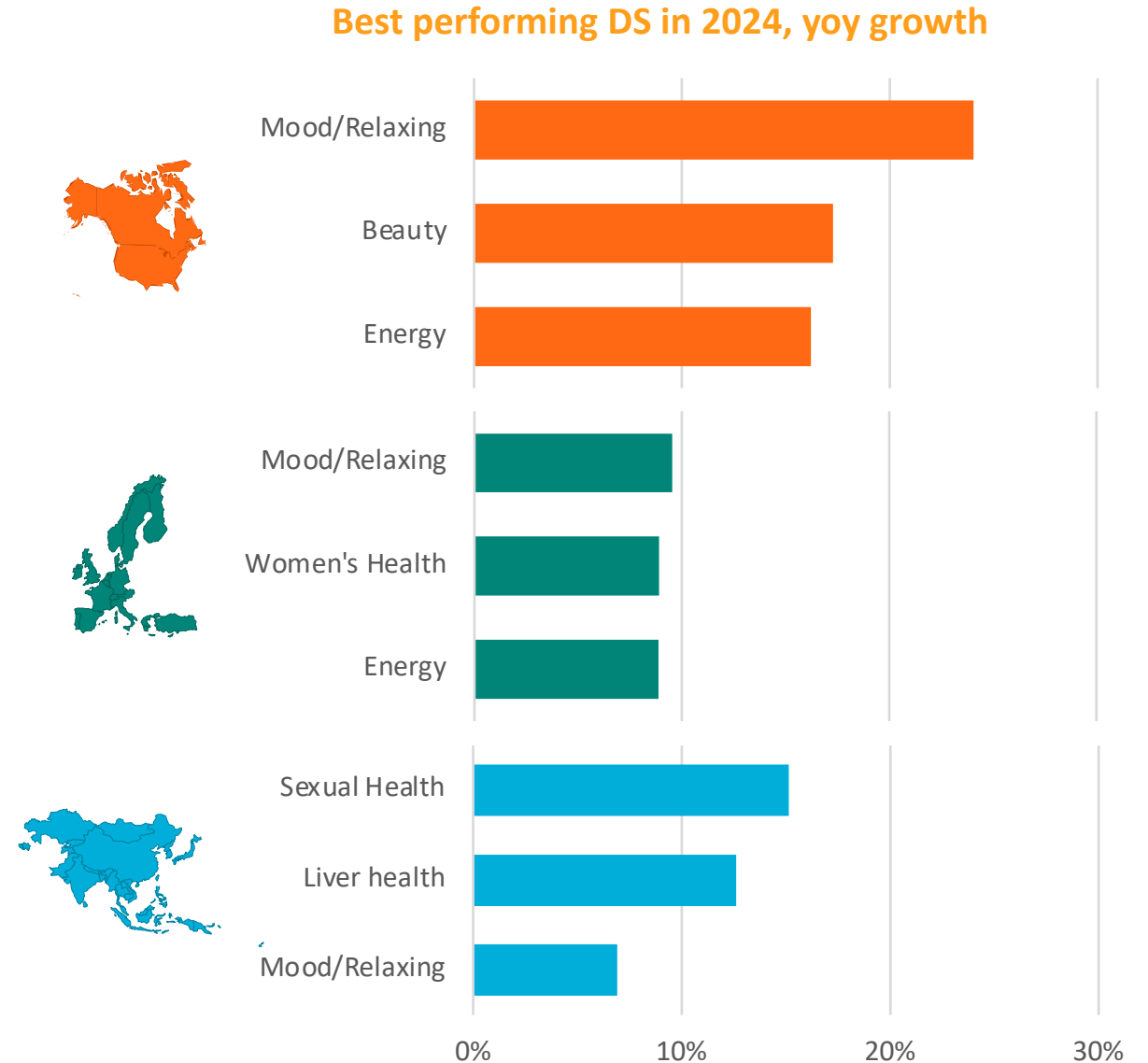


Source: Euromonitor International, Consumer Health

■ 2019 ■ 2024 ● 23-24 %

# Lifestyle conditions lead growth post-pandemic

Though immunity had a burst in interest in the immediate COVID period, claims around other considerations like mood/relaxation, beauty, memory, and liver health have seen the strongest growth since



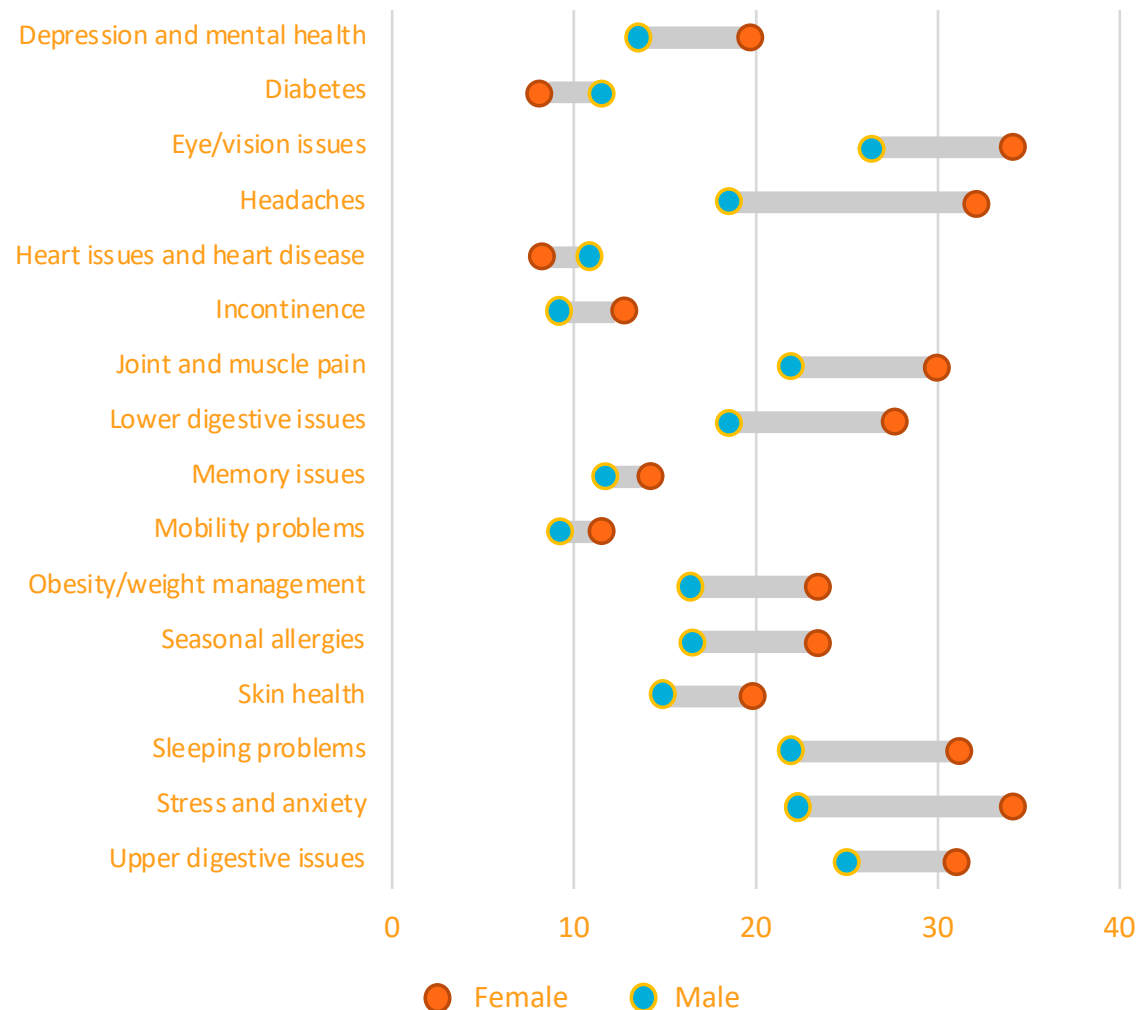
Source: Euromonitor International, Consumer Health



# Rates of current health concerns considerably higher among women


The highest differential can be found in stress and anxiety, sleeping problems, joint and muscle pain, lower digestive issues, and headaches

## Current Health Concerns, Response Differential Between Female and Male



Source: Euromonitor International Voice of the Consumer: Health and Nutrition Survey, fielded January to February 2024

# Top Trends in Consumer Health 2024




**Sexual health as  
a halo orientation**



**Liver  
detoxification**



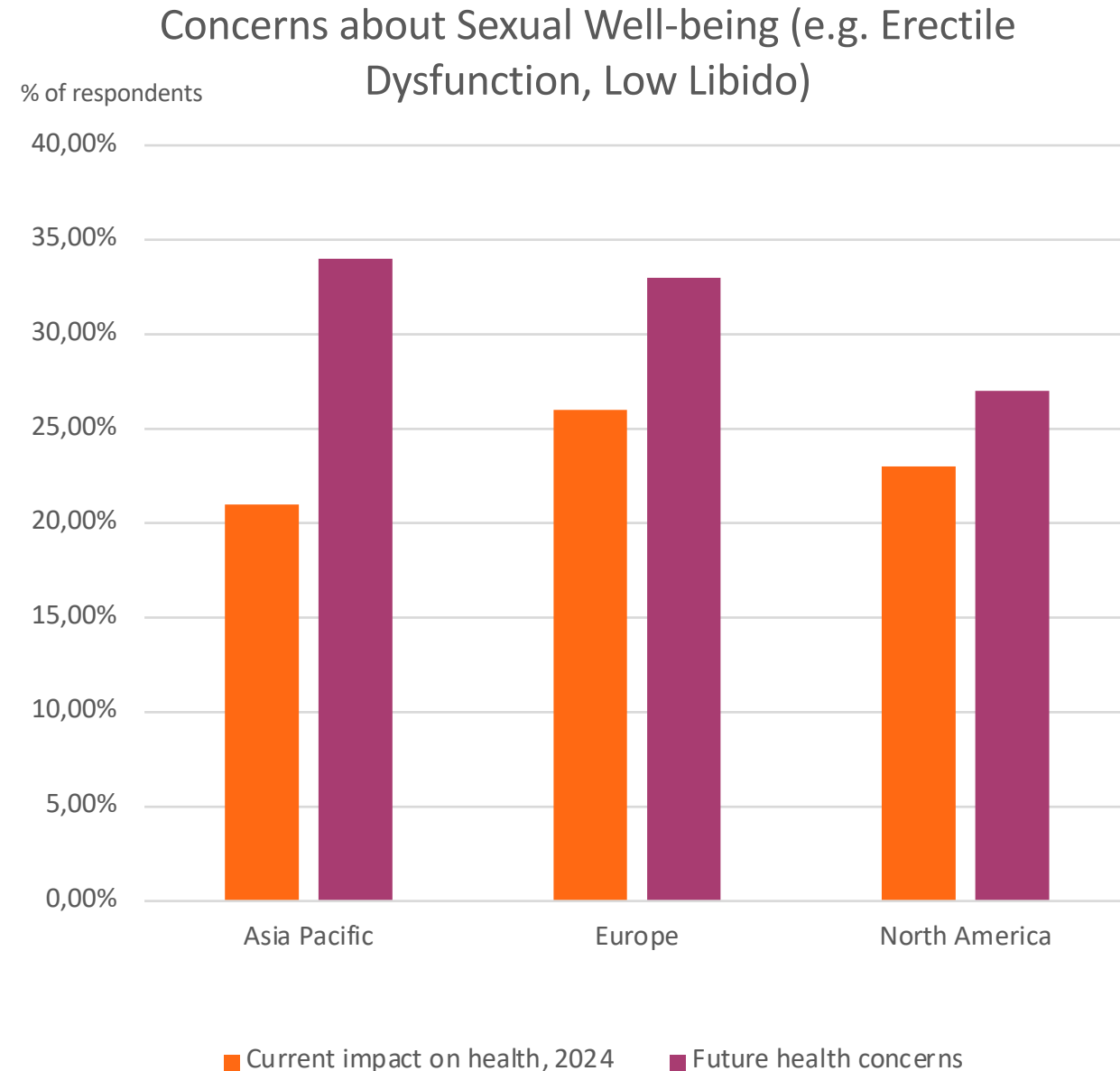
**Targeted  
wellness**



**The impact of  
weight loss drugs**

# Sexual wellness holds significant potential across regions

There is a growing demand for products and services that promote sexual health and well-being, such as dietary supplements to enhance sexual performance

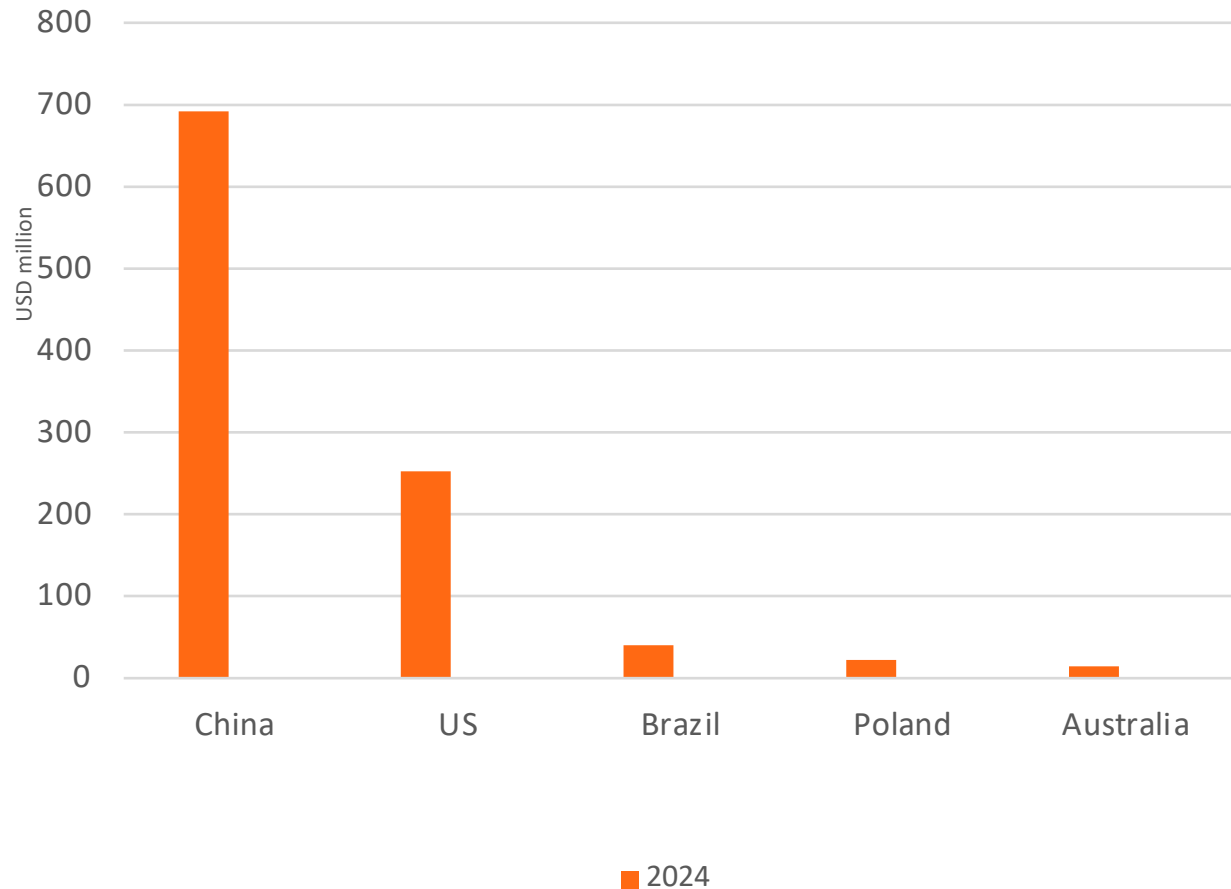


Source: Euromonitor International Voice of the Consumer: Health and Nutrition Survey, fielded January to February 2024

# Hectic lifestyles drive market of liver health supplements

Many consumers, particularly in the APAC region, are turning to supplements as a potential means of boosting their wellbeing and ensuring their bodies can and ensure that their bodies can keep up with the demands of daily life.

Key regional markets for liver health supplements

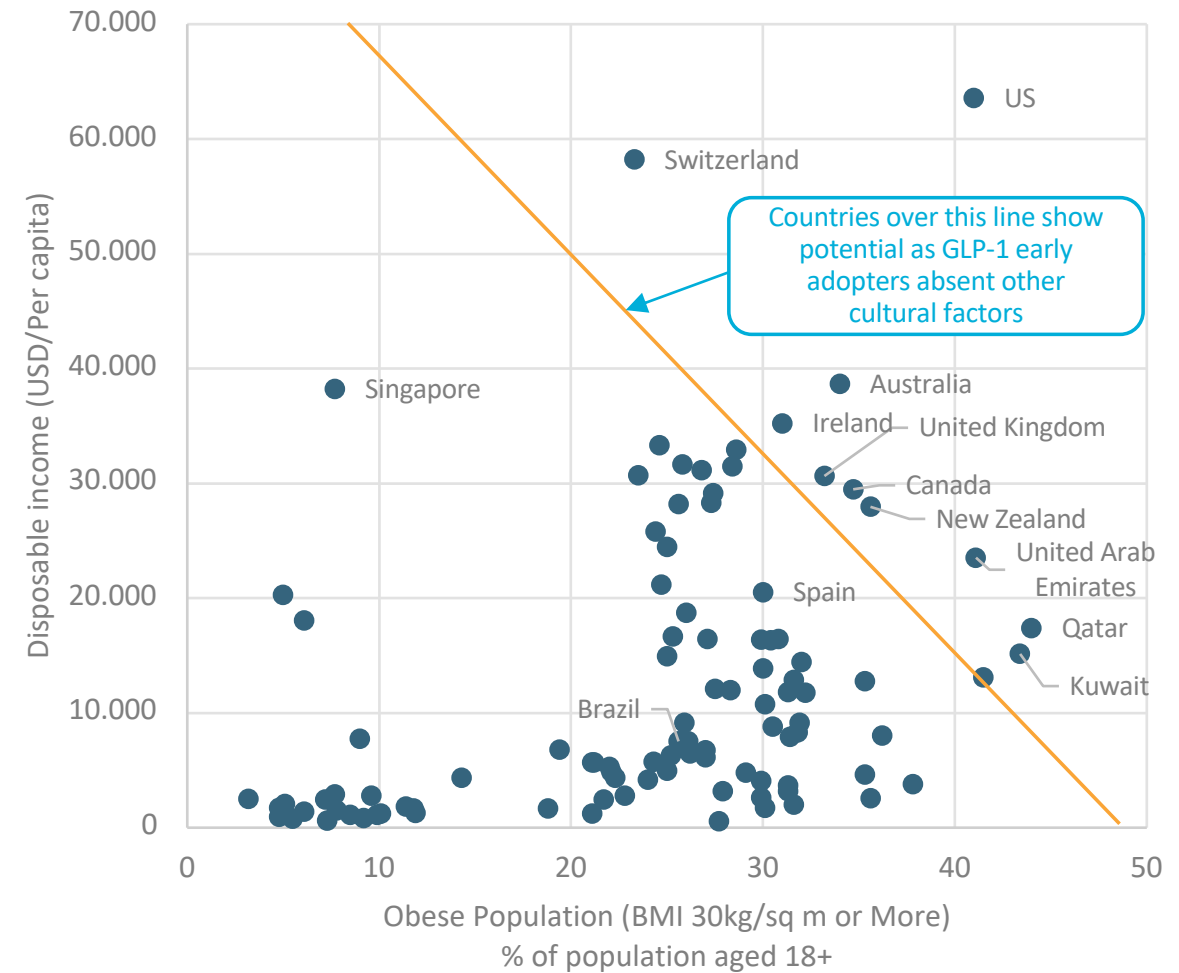


Source: Euromonitor International, Consumer Health



# Projecting the next markets for GLP-1s

Obesity prevalence and purchasing power as factors to evaluate GLP-1 market adoption, 2024

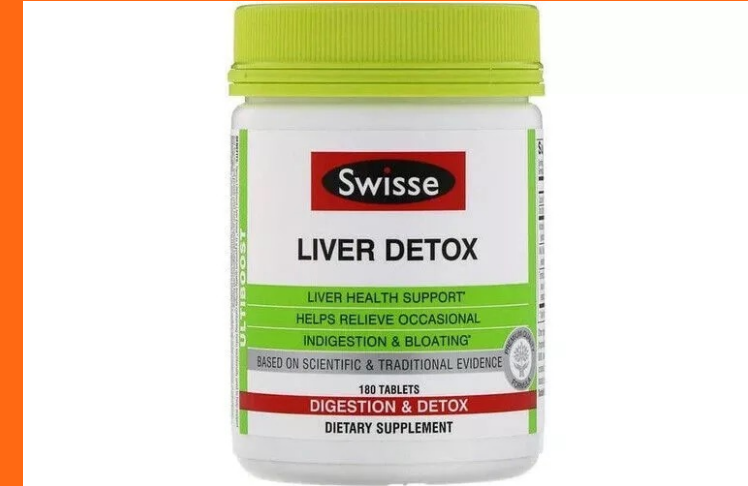


Source: Euromonitor International, Economies and Consumers

# Meeting Consumer Needs



Source: [shop-apotheke.com](https://shop-apotheke.com)



Source: [swisse.com](https://swisse.com)



Source: [getrael.com](https://getrael.com)



Source: [sensilab.com](https://sensilab.com)



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# Key takeaways

## **Legacy of inflation will continue into 2025**

Though inflation has tapered considerably, consumers have reoriented purchasing behaviour and will need affirmative reasons to restart prior rates of engagement.

## **Consumer incentives point to demands for multifunctionality**

Consumer interest in toward holistic solutions will continue unabated going into 2025. Offering options that meet consumers' broad lifestyle considerations is critical to build and sustain loyalty.

## **E-commerce innovations sustain interest in key markets**

The rise of DTC selling, livestreaming, and social commerce will continue to drive growth of vitamins and supplements, first in key markets in Asia and increasingly elsewhere.



# Thank you

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Magda Starula, Consultant – Health & Beauty

✉ [Magda.Starula@euromonitor.com](mailto:Magda.Starula@euromonitor.com)

[in linkedin.com/in/magda-s-aa3517b7/](https://www.linkedin.com/in/magda-s-aa3517b7/)

# event overview.

## speakers



**MAGDA STARULA**

*Research Consultant*



**MATEVŽ AMBROŽIČ**

*Marketing Director*



## agenda

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category deep dive  
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# category deep dive

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CONDITION MANAGEMENT | GLP-1 | SEXUAL HEALTH | CELLULAR HEALTH



# condition management.

Pandemic (2020-21)  
**prevention**

Aftermath (2022-23)  
**return to treatment**

Post-pandemic (2024+)  
**recovery**  
**Rx companions**



Recovery and Rx companion products are very interesting new markets and promising adjacencies for growth. Not treating direct causes and symptoms but easing life with a certain condition and making life more comfortable. I think we're going to see a lot of that. Products for oncology, long COVID, CVD, diabetes, Parkinson's, dementia, etc.

*Nicholas Hall's 34th CHC European Conference, April 2024*





# condition management.



## “Empower consumers with MS”

### Phytaphix (IRL)

Targeting nervous system function, inflammation, fatigue, and muscle function to “empower” consumers with multiple sclerosis (MS).

Based on several botanicals (frankincense, pomegranate, Andrographis, marigold, turmeric, milk thistle, ginger), Coenzyme Q10, vitamin B12, and D3.

Formulated by founder Dr. Conor Kerley, who has MS since 2003.

Launched in May 2024.



## “Enhance gut health and thus ease ASD symptoms”

### Floré (USA)

MOOD: By enhancing gut health, this probiotic mix aims to improve focus, reduce irritability, and stabilize mood variations associated with ASD.

PATHWAYS: Crafted to support metabolic function, boost thiamine, reduce harmful bacteria, and improve GABA levels for Neurodiverse individuals and / or those on the Autism Spectrum.

Both products are based on several probiotic strains, combined with either turmeric or broccoli sprouted powder.

Launched in August 2024.

# condition management.



## “Manage comorbidities & side effects in epileptic children”

Cor.Con. International (ITA)

Manage comorbidities and side-effects in pediatric patients with epilepsy, improving their quality of life without impacting seizure management. A complementary, natural adjunct to traditional AEDs for reducing systemic toxicity, neurotoxicity, and GI symptoms.

Based bacopa, eleuthero, griffonia, vitamin B6, E, C and polyunsaturated fatty acids.

Launched in October 2024.



## “Improve the immune response & gut microbiota of breast cancer patients”

Hifas da Terra (SPA)

Formulated to improve the immune response of breast cancer patients and help regulate the gut microbiota, altered by cancer treatments. It may reduce the side effects of primary oncology treatments, such as immunosuppression, fatigue, neurological deterioration and peripheral neuropathy, thus improving the quality of life of patients.

Mushrooms prebiotics and vitamins in nanoemulsion and probiotics in capsules.

Launched in 2022.

# condition management.



**MENTALIFY®**  
MANAGE YOUR KID'S HYPERACTIVITY.

## Finzelberg (GER)

Branded lemon verbena extract designed for children and teenagers displaying behavioral characteristics such as inattention, hyperactivity and impulsivity. .

Launched in May 2024.



We are witnessing enormous attention for MENTALIFY®. In an early phase before children are diagnosed with ADHD, parents can already support their children with products offering immediate improvement of typical behavioral characteristics such as inattention, hyperactivity and impulsivity. Our clinical study will be published in early 2025 and given the global prevalence of some 7-8% of children displaying typical characteristics, we are very confident that this category will quickly evolve in the nutraceutical space as parents are seeking help with supportive regimens.



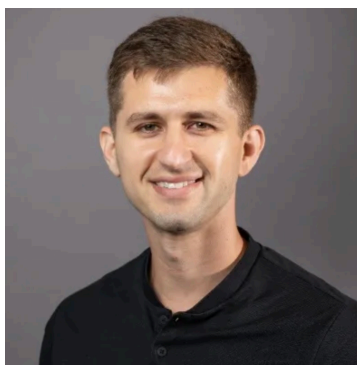
**Martin Felkner**  
*Senior Expert Branded Ingredients*



# GLP-1.



I expect the industry to see significant impacts from GLP-1's ever increasing user base. While this will have a negative impact on traditional weight management categories (-13,5% YTD), I expect adjacent categories to see a significant bump. This includes protein as well as **multivitamins**, which I think will have **their best growth year in a long time**.



**Scott Dicker**  
*Market insights director*



# 12%

**of US adults have  
used GLP-1 drugs**

*Source: Kaiser Family  
Foundation survey, May 2024*



# 14%↓

**y-o-y decline of weight  
management supplement sales**

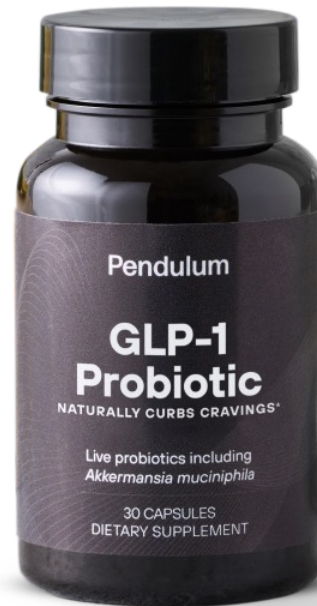


# GLP-1.

**1** **GLP-1 user support**  
Addressing GLP-1  
agonist side effects



**2** **“Natural” GLP-1 boosters**  
Nutraceuticals increasing  
GLP-1 levels



**3** **“Fauxzempic”**  
Nutraceuticals imitating GLP-1  
effects through other mechanisms





# GLP-1 user support.

## Addressable symptoms

### BLOOD SUGAR LEVEL CHANGES

Berberine, chromium, cinnamon, etc.

### NUTRITION GAPS

Vitamins, minerals, other micronutrients.

### MUSCLE LOSS

Proteins, peptides, amino acids, creatine, etc.

### SKIN TONE LOSS

Collagen, electrolytes, hyaluronic acid, gut-skin axis biotics, etc.

### DIGESTIVE ISSUES

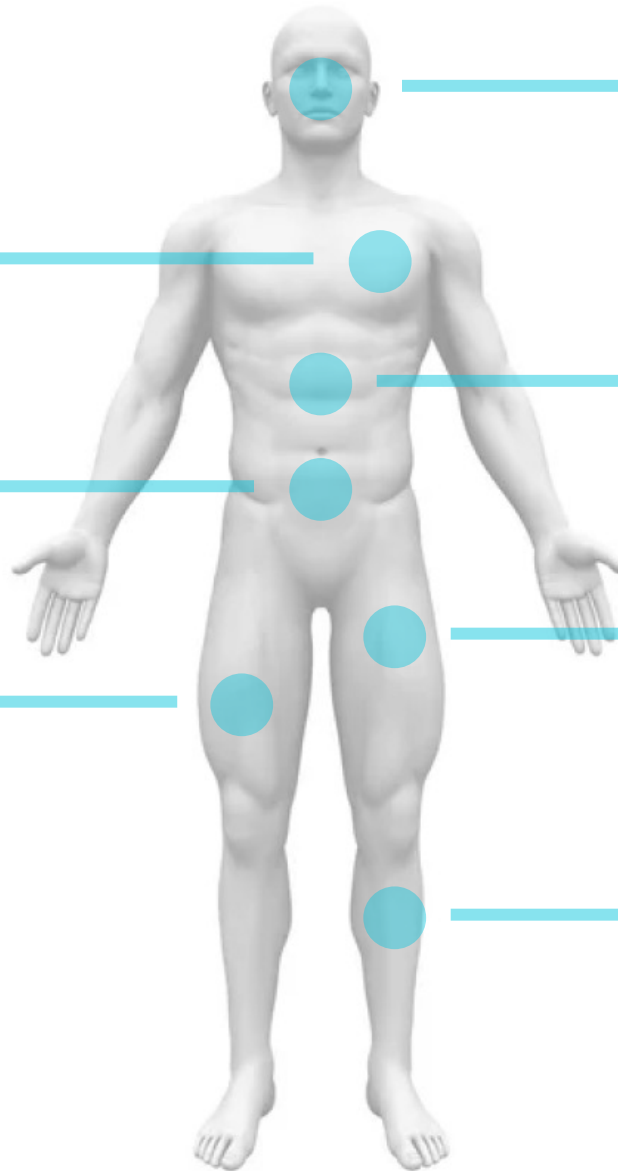
Biotics, digestive enzymes, ginger, etc.

### LOW ENERGY

Multivitamins, B vitamins, ginseng, caffeine, etc.

### BONE DENSITY LOSS

Calcium, vitamin K2, vitamin D3, magnesium, etc.



# GLP-1 user support.

Repositioned  
products



GNC (USA)  
Launched in April 2024.



Nestlé Health  
Science (USA)  
Launched in  
June 2024.



+70%

y-o-y sales growth  
in Q1 2024

Source: The Vitamin  
Shoppe Health &  
Wellness Trend  
Report 2024

# GLP-1 user support.

## New launches



### iHerb (USA)

Designed to support GLP-1 agonist users by addressing digestive issues including nausea and pain, loss of muscle mass and skin elasticity, and changing blood sugar levels. Launched in June 2024.



### SoWell (USA)

An electrolyte, protein, and fiber supplement, combining 17 ingredients that alleviate side effects like nausea, constipation, diarrhea, fatigue, headaches, muscle loss, weakened skin elasticity, and hair loss. Launched in August 2024.

branded ingredients

Relesium™

PeptiStrong™

OptMSM®



# natural GLP-1 boosters.



## CKDHC (KOR)

Designed to promote GLP-1 productions. Based on 3 probiotic strains, one of them shown to activate GLP-1 in mice. Launched in June 2024.



## KK Nutrition (USA)

Designed to promote GLP-1 production, promote insulin sensitivity, reduce hunger and cravings and support fat reduction. Based on Eriomin®, Supresa®, and Morosil™. Launched in September 2024.

branded ingredients

nextida·GC

palatinose™  
isomaltulose

metabolaid

Eriomin™

Cissus

Cissus CQR-300® (Cissus Quadrangularis)

# natural GLP-1 boosters.



I am cautious about the idea of "botanical or nutraceutical GLP-1s" as the size of the effect from natural products on the glucagon like peptide target mechanisms of action are dwarfed by the power of pharmaceuticals and it is at best, questionable, if not frankly illegal, to offer a dietary supplement as a direct replacement for a drug (in the US).



**Kenn Israel**  
*Founder & Manager*



Some prebiotics, in adequate amounts, naturally activate metabolic pathways in a similar but lesser fashion than GLP-1 agonist drugs. This is dangerous territory and we as industry need to realize the risk of supporting any misleading advertising or claims that suggest 'biotics' in any way as alternatives. We at GPA are working on a member guidance and best practice at working group level on this. The more important role is the nutritional support role that many prebiotics can have, for those thinking about or on these medications.



**Len Monheit**  
*Executive Director*



# “fauxzempic”.



## Arrae (USA)

Formulated to reduce cravings, increase energy and burn body fat. Based on vitamin B6, chromium, green tea extract, african mango seed extract, cissus leaf extract, grains of paradise seed extract, and Bifidobacterium lactis B420. Launched in June 2024.



## Ultima Health Products (USA)

Hydrates with 6 key electrolytes and reduces snacking with Chromax® (chromium picolinate), which is clinically shown to reduce cravings. Launched in September 2024.

branded ingredients

Supresa®  
CRAVE CONTROL

Chromax®  
chromium picolinate

SATIEREAL®

# sexual health.

Sexual health supplements show one of the highest fulfillment gaps.

theoretical demand

~85%

of EU consumers are willing to use supplements to address sexual health



ITC 2024 Consumer Supplement Survey

realized sales

Sexual health supplements mostly represent <5% of the supplement market

4,1% 2,5% 0,4%



Euromonitor International

November 2024

# sexual health.

The probable reasons are marketing and formulation efficacy.



Sexual health is an exciting area that remains loaded with possibilities for expansion and significant sales on the back of consumer demand. However, **marketing has traditionally not reached consumers, especially women, in engaging ways.** Breaking taboos, reducing stigma and being inclusive are at the heart of the opportunity.

*Nicholas Hall's Sexual Health & Fertility Report, October 2024*



Sexual health has always been an opportunity. **The challenge is to create a very efficient product** and incorporate it into your brand. In my view, a solid scientific approach is required to gate the trust of the consumer.



**Pierre Gastaldi**  
R&D Manager





# sexual health ingredients.

## APHRODANA®

LIVE YOUR LOVE.

We are witnessing stable growth for APHRODANA®, with China, India and South Korea being the most important markets with many new brands igniting the space. Natural ingredients catering to sexual arousal, leveraging mood and desire are flourishing in urban Asian communities.

**Martin Felkner**

*Senior Expert Branded Ingredients*



## TESTFACTOR®

PLT Health Solutions (USA)

Launched in October 2024.

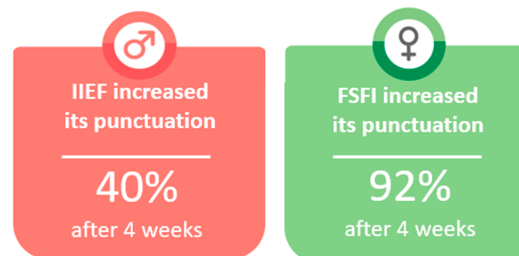
- ♂ 48% improvement in overall sexual function†
- 🕒 58% improvement in sexual frequency†
- ✓ 49% improvement in erections†
- 😊 44% improvement in sexual satisfaction†



## Liboost™

Pharmactive (SPA)

Launched in November 2022.



# sexual health products.



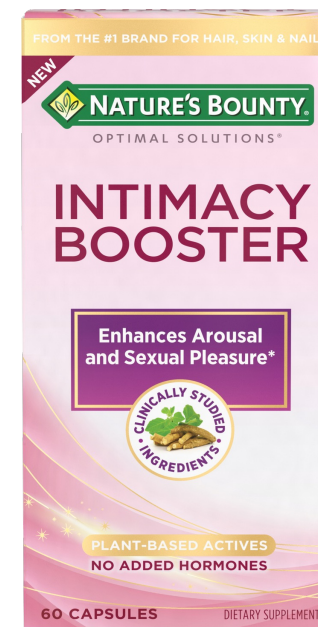
## Novomins (UK)

Designed for women, addressing aspects of female sexual health, including psychological and hormonal well-being. Based on L-arginine, maca root, Tribulus terrestris extract, zinc, vitamins B6 and B12, green tea extract, damiana extract, ashwagandha, and fenugreek. Launched in September 2024.



## Pure Flow (FRA)

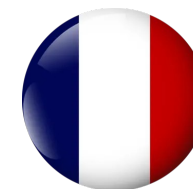
A line of products for male libido and vigor. Based on L-citrulline, boswellia, ginger, rhodiola, Tribulus terrestris, CBD, and boron. Launched in June 2024.



## Nature's Bounty – Nestlé HS (USA)

Designed for women to improve orgasm, enhance arousal and lubrication, and help ease everyday stress so you can relax and connect. Based on KSM-66® ashwagandha and ginseng. Launched in October 2024.

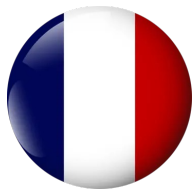
# sexual health sell-out data.



TOP 9 Products	Company	MAT 10 2024 value	y-o-y growth	MAT 10 2024 units	y-o-y growth
LIBIMEN CAPSULES	NHCO	348 k€	+29,6%	10.535	+25,3%
ARKOGELULES TRIBULUS BIO CAPSULES	ARKOPHARMA	178 k€	+11,2%	14.401	+6,7%
LIBICARE MENO CAPSULES	PROCARE HEALTH	149 k€	+84,0%	5.171	+81,7%
PERFORM ERECT 4 CAPSULES	LES 3 CHENES	121 k€	+2,7%	8.602	+3,7%
LIBIDOGEN FEMME BIO	HERBALGEM	90 k€	+0,7%	2.988	-0,2%
EAFIT TRIBULUS TABLETS	EQUILIBRE ATTITUDE	60 k€	+6,2%	2.649	+2,3%
LIBICARE TABLETS	PROCARE HEALTH	57 k€	-25,5%	1.658	-28,7%
PERFORM ERECT 16 CAPSULES	LES 3 CHENES	52 k€	+3,0%	1.557	+10,7%
ULTRA BOOST 4G DESIR VIGUEUR TABLETS	FORTE PHARMA	38 k€	-10,3%	1.984	-15,3%

Source: OpenHealth Company sell-out data, October 2024

# sexual health sell-out data.



## TOP 9 Products



Company	MAT 10 2024 value	y-o-y growth
NHCO	348.000 €	+29,6%
HERBAL PHARMA	178 k€	+11,2%
PROCARE HEALTH	149 k€	+84,0%
LES 3 CHENES	121 k€	+2,7%
HERBAL CEM	91 k€	+0,7%
EQUILIBRE A TITUDE	60 k€	+6,2%
PROCARE HEALTH	57 k€	-25,5%
LES 3 CHENES	52 k€	+3,0%
ABLETS FORTE PHARMA	38 k€	-10,3%

data, October 2024



Aside from the sexual health formula itself, it is the **concept around the product** (training, general man vitality support, etc.) that support the success of the product.



**Maud Belicchi**  
Global CHC portfolio management lead



# cellular health.

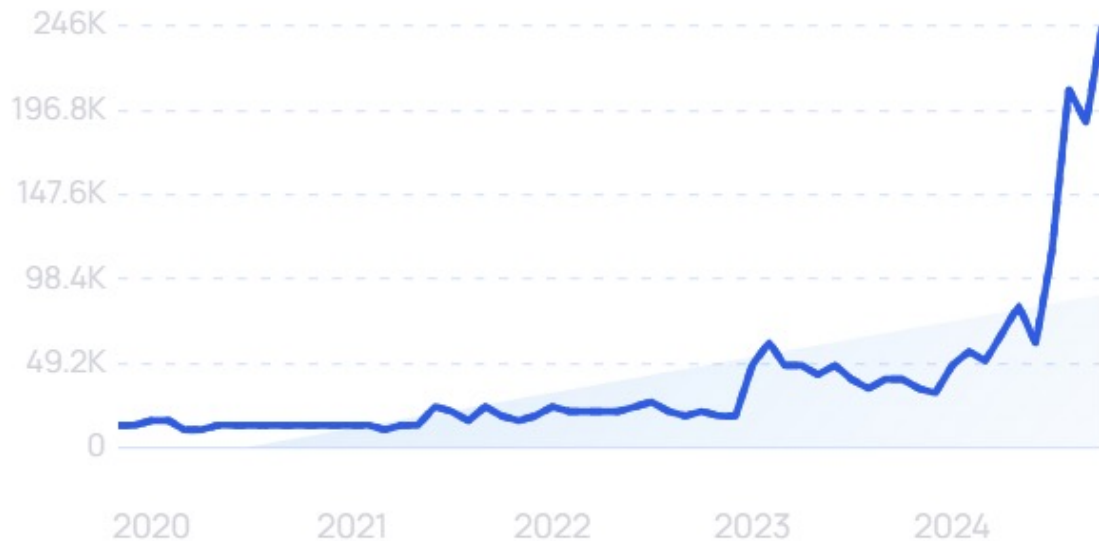
246K

Volume

+1740%

Growth

Searches for  
“NAD supplement”



Source: Exploding Topics, November 2024

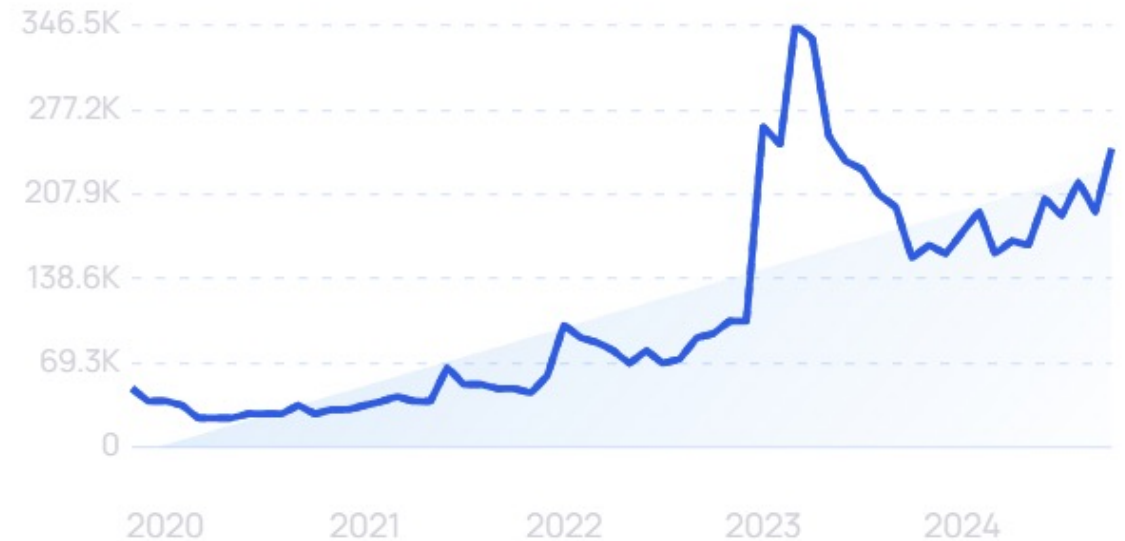
246K

Volume

+407%

Growth

Searches for  
“NMN supplement”



Source: Exploding Topics, November 2024



# cellular health.

+37%



one of 2 key products driving 37% growth FY 2023 revenue growth of H&H Group in China

NutraIngredients  
ASIA

+26%



Y-o-y sales growth of supplements with NADH as Func. Ingr. 52 Weeks Ending 09/08/24

SPINS®

7k



Monthly units sold on Amazon, November 2024.

EXPLODING TOPICS

6,6k



Monthly units sold on Amazon, November 2024.

EXPLODING TOPICS

# delivery formats

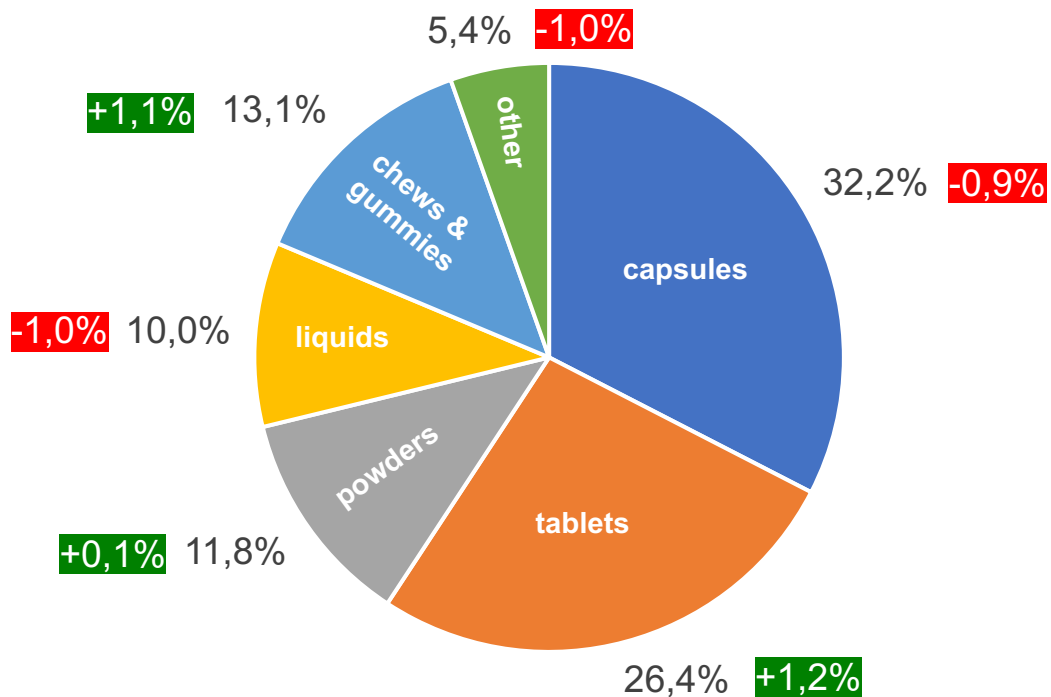
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OVERVIEW | GUMMIES, SOFT CHEWS & MELTS



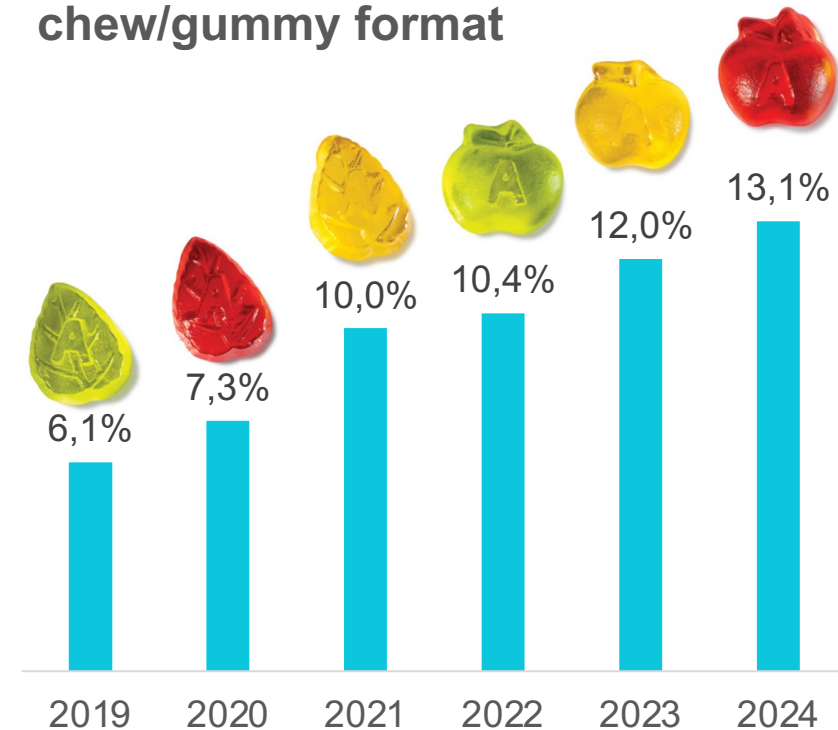
# delivery formats.

New supplement launches by format (2024)



Source: Mintel GNPD, November 2024

Share of new launches in chew/gummy format



Source: Mintel GNPD, November 2024

# gummies.



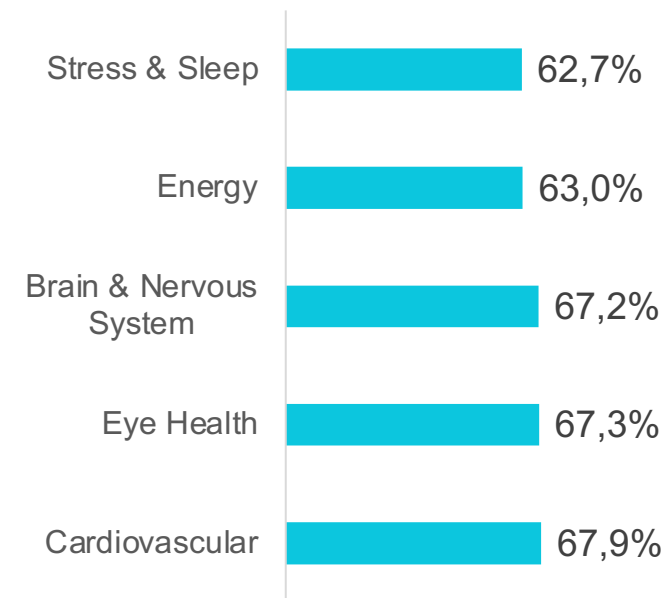
A current market trend is blending science with fun in traditionally somber health categories. The approach is simple: target a category dominated by traditional pill formats, add science-backed ingredients with proven benefits, and deliver them in a more enjoyable form, like a nutraceutical gummy. For example, we launched MenoBalance™ gummies, powered by Novasoy® from ADM. While menopause supplements have traditionally relied on pill formats, consumers now seek science-backed ingredients in a pleasant format that encourages long-term use. This was the first time Novasoy® was successfully delivered in a delicious gummy format, despite its inherently bitter taste. This raises the question: What other science-backed ingredients have we overlooked due to perceived flavor technology limitations?



**Maria Pavlidou**  
*Head of Brand*



## Top 5 categories by share of new launches in pill format



Source: Mintel GNPD, November 2024, launches from 2019-2024



# soft chews.



In our view, soft chews are “the next gummy”.

Soft chews can go up to 5 grams in mass and nearly 50% of the total mass can be reserved for active ingredients. Gummies, on the other hand, typically weigh up to 3 grams, 10% of which is available for actives. With soft chews, much less heat is used in the process, which is favorable for ingredient stability. With more maneuvering space one can also mask taste better. Additionally, they can be perceived as more elegant and more medicinal. They’re growing very rapidly in the US, but we’re seeing them coming to the European market now as well.



**Mark Gardella**  
*VP of Product Development,  
Consumer Health Division*

**Catalent**



**Viactiv (USA) – acquired by Doctor’s Best (USA) in June 2024** to “provide customers with essential nutrients in new options”.



# melts.



Health and wellness brands are increasingly leveraging innovative encapsulation and emulsion technologies to create unique sensory experiences that captivate consumers, as exemplified by **the fusion of freeze-dried fruits with dietary supplements**. This trend, showcased by companies like Melt & Jet, not only enhances the nutritional value of products but also offers a delightful texture and flavor profile, effectively bridging the gap between functional benefits and enjoyable experiences.



**Dr. Raphaëlle O'Connor**  
*Founder and Director*



Functional fruits  
& vegetables



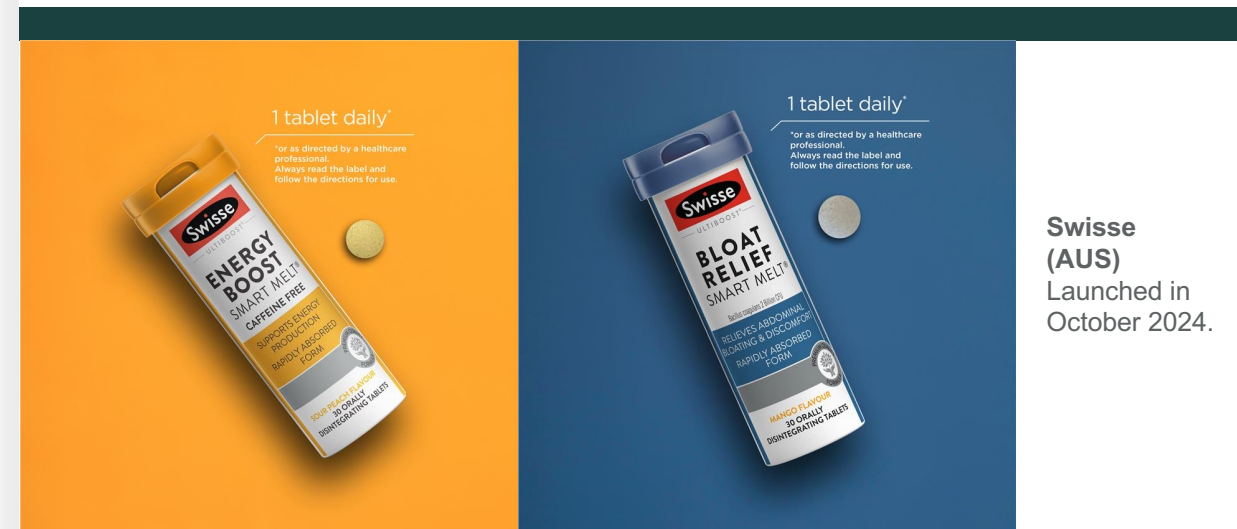
Nutraceuticals &  
Vitamins



Optimized-Absorption freeze-  
dried technology



melts on your  
tongue



**Swisse  
(AUS)**  
Launched in  
October 2024.

# marketing strategies

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EXPEDITED CLINICALS | PRECISION HEALTH | HCP INFLUENCERS



# expedited clinicals.



## Placebo-controlled RCTs

- starting at **100.000\$\***
- 500** subjects
- results within **6 months**

\* add-ons include additional trial arms, configurable eligibility, duration, outcomes, manuscripts, biomarkers, and more

## Case study

- 3 arm trial (placebo, #1, #2)
- N = 620
- #1 failed to beat placebo
- #2 beat placebo
- launched #2, with “clinically proven” claim, and peer-reviewed publication



We conducted a clinical study to evaluate the effects of **MDsleep + hemp** on sleep and overall health outcomes.

✂  
Random-  
ized

⬭  
Placebo  
Controlled

👤|👤  
Double  
Blinded

👤👤  
620  
Participants

### Sleep

↑ **57%**  
Reported  
Improvement

### Stress

↑ **38%**  
Reported  
Improvement

### Well-Being

↑ **14%**  
Reported  
Improvement

### Anxiety

↑ **60%**  
Reported  
Improvement



# expedited clinicals.



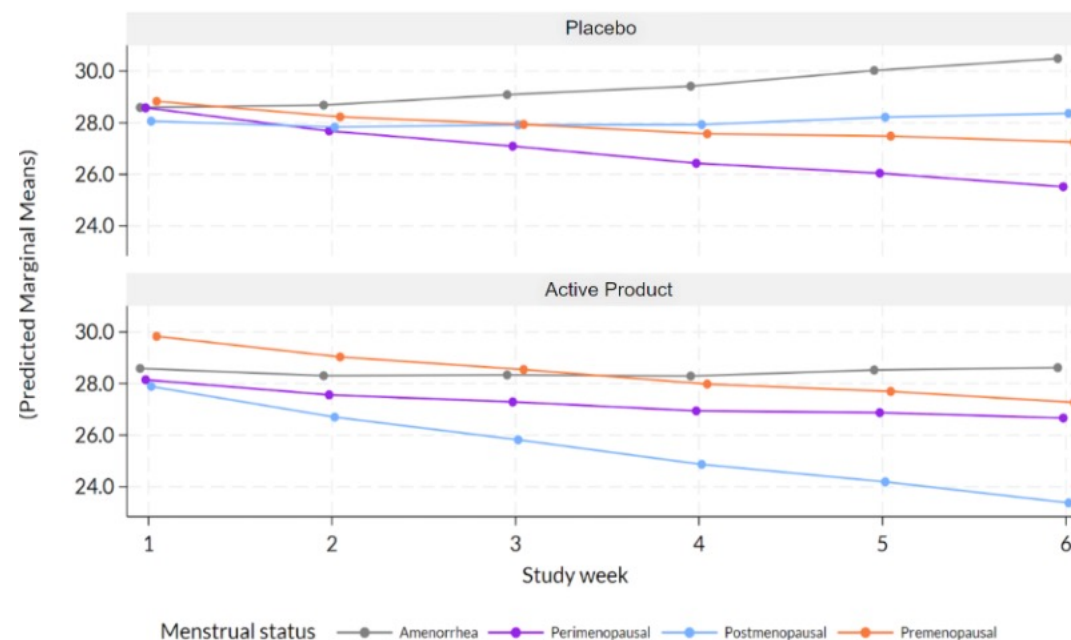
The increased trend towards personalization means it's no longer sufficient to offer a product that works for an “average person. Due to the large and diverse group of participants we recruit for each study, we include a wide range of ethnicities, ages, genders, BMIs, habits, condition severities, etc. As a result, we can assess not just if “on average” any of the formulations beat placebo with statistical significance, but **which subpopulations are most and least likely to benefit**. We conduct such precision analysis by a combination of AI and advanced biostatistics.



**Pelin Wood Thorogood**  
*Co-Founder & Executive  
Chairwoman*



## Perceived stress improved among postmenopausal women



### Discover subpopulations with more pronounced effects:

- tailor marketing to target them
- inform future R&D and study strategy

# expedited clinicals.



## Patented Ex-Vivo Clinical Trials

- **5x** faster
- **10x** cheaper
- **1/3** needed subjects



## Clinic'n'Cell APPROACH

### PHASE 1

Clinical phase with a limited number of volunteers:

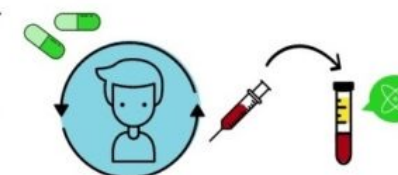
Blood samples are collected after the volunteers have consumed the test product (i.e., a food supplement) to determine when compound levels peak in the blood.



### PHASE 2

Clinical phase with a larger number of volunteers:

Blood samples are collected at the absorption peak determined on phase 1 to obtain blood sera enriched with the target metabolic compounds.

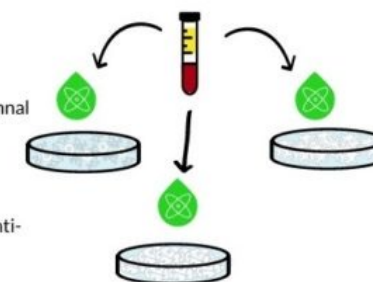


### PHASE 3

Ex vivo phase:

Evaluation of human cell behavior (functional assays) in the presence of serum enriched with metabolic compounds.

The data show whether verifiable health benefits occur (e.g., cholesterol control, anti-arthritic action,...).



Characterisation of any biological affects in humans



### RESULTS

obtained without animal testing



withing a few weeks





# precision health.



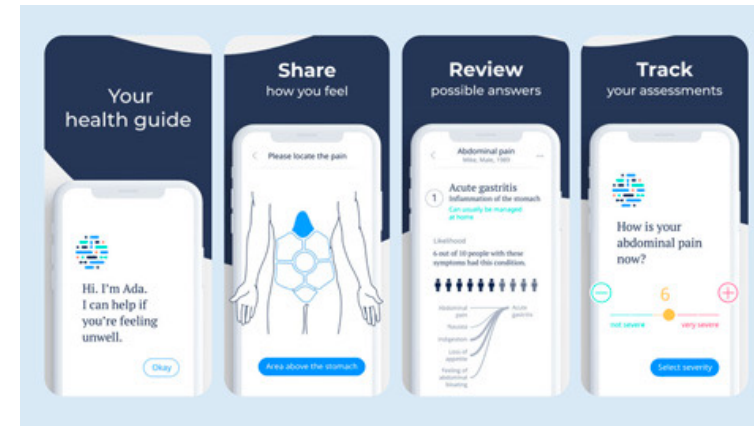
In Romania, we're seeing a significant shift as consumers increasingly prioritize proactive health management, particularly through self-care. This shift is being fueled by both a rising interest in preventative health and the digital transformation of health information. Consumers are seeking informed guidance, often via healthcare apps or digital health platforms that help them understand and manage their health needs independently. **The potential for self-care to bridge new gaps remains largely untapped and will likely drive future growth.**



**Diana Mereu**  
CEO

.....  
**RASCI**  
ASOCIAȚIA ROMÂNĂ A PRODUCĂTORILOR  
DE MEDICAMENTE FĂRĂ PRESCRIȚIE,  
suplimente alimentare și dispozitive medicale

## Digital tool for self-assessment, symptom checking and health insights for women's intimate health



**430,000+**

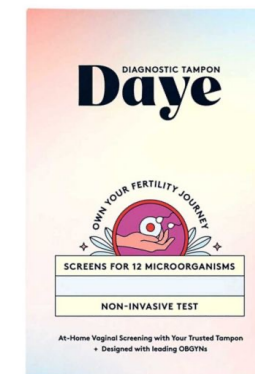
users have completed an assessment

**4x**

more time consumers spent on Bayer websites

**55%**

increase in Bayer webpages viewed

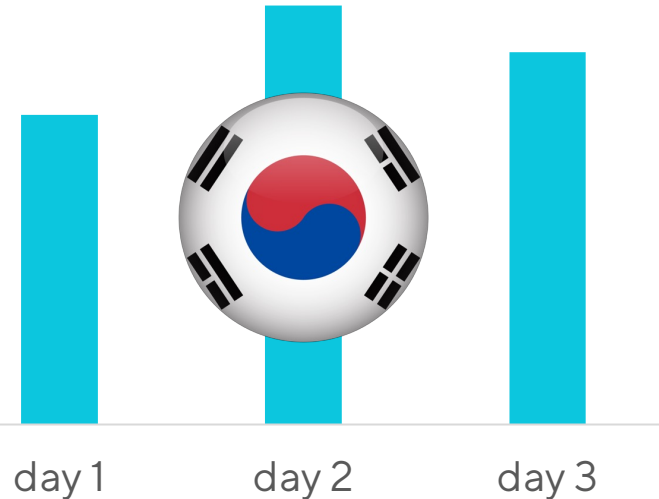


**Daye Diagnostic  
Tampon among  
Time's Best  
Inventions of 2024**

# HCP influencers.

11.083

UNITS SOLD  
IN A 3-DAY CAMPAIGN



**Dr Mike Varshavski**  
Family Medicine

**4,4M**  
followers



**Dr Karan Rajan**  
NHS Surgeon

**1,5M**  
followers



**Dr Julie Smith**  
Clinical Psychologist

**2M**  
followers



**The future of nutraceuticals has just begun.**

They will help to overcome the artificial boundaries between a healthy lifestyle and classical medication as we know them from the past. Nutraceuticals will become an integrated part of our daily lifestyle as long as they can be trusted, are reliable, do not overpromise, and come with a clear added value compared to all the commodity products already existing in this somewhat overcrowded and confusing market.



**Oliver Freichel**  
*Managing Director*





