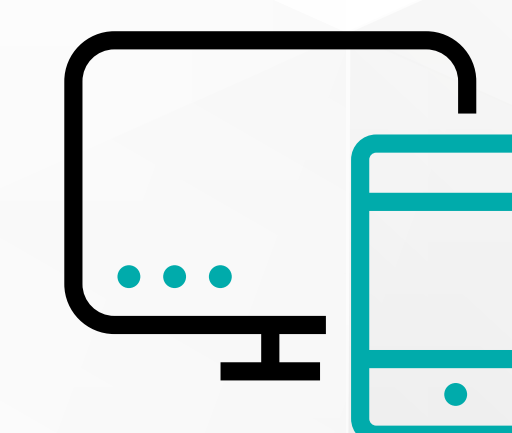




DIETARY SUPPLEMENTS MARKET IN POLAND 2022

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2022-2027



A stylized illustration of a cup of iced coffee. The cup is white with a black outline. It contains several ice cubes, some of which are light blue and others are black. There are also small blue dots representing bubbles or liquid. A black straw with a white tip is inserted into the cup. The cup is set against a light gray background.

The report includes, **in particular**, information on:

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- RYNEK SUPLEMENTÓW DIETY W POLSCE 2022**
- 2022**
- Prognozy rozwoju 2022-2027**
- PMR | MARKET EXPERTS**
- RYNEK SUPLEMENTÓW DIETY W POLSCE 2022**
- 20 najpopularniejszych suplementów diety z witaminą D w Polsce, pod względem wartości (mln zł), 2020**
- | Lp. | Produkt | Producent | Wartość sprzedanych, 2019 | Wartość sprzedanych, 2020 | Dynamika | Liczba sprzedanych opakowań (mle), 2019 | Dynamika |
|-----|----------|-----------|---------------------------|---------------------------|----------|---|----------|
| 1 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX | XXXX | XXXX |
| 2 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX | XXXX | XXXX |
| 3 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX | XXXX | XXXX |
| 4 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX | XXXX | XXXX |
| 5 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX | XXXX | XXXX |
| 6 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX | XXXX | XXXX |
| 7 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX | XXXX | XXXX |
| 8 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX | XXXX | XXXX |
| 9 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX | XXXX | XXXX |
| 10 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX | XXXX | XXXX |
- 20 najpopularniejszych suplementów diety z witaminą D w Polsce, pod względem liczby sprzedanych opakowań (mle), 2020**
- | Lp. | Produkt | Producent | Liczba sprzedanych opakowań, 2019 | Liczba sprzedanych opakowań, 2020 | Dynamika |
|-----|----------|-----------|-----------------------------------|-----------------------------------|----------|
| 1 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX |
| 2 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX |
| 3 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX |
| 4 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX |
| 5 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX |
| 6 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX |
| 7 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX |
| 8 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX |
| 9 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX |
| 10 | XXXXXXXX | XXXXXXXX | XXXX | XXXX | XXXX |

All calculations and forecasts in the report have been prepared taking into account current trends and events, including inflation for the analysed products, the war in Ukraine and migration to Poland.

MORE ABOUT PMR

About PMR



- 25 YEARS' EXPERIENCE
- UNIQUE MARKET DEVELOPMENT FORECASTS
- MULTIDISCIPLINARY TEAM

PMR is one of the **leading research and analysis companies** in Poland.

We offer industry reports and market research and forecasting services in Poland and Central and Eastern European countries.

We specialise in the **construction, pharmaceutical & healthcare, IT & telecommunications, and retail industries**.

We calculate **the size of the markets** and **prepare their development forecasts**.

In order to obtain accurate information, we **cross refer data** from primary and secondary sources. This, combined with our more than 25 years' experience, allows us to achieve a unique precision of results.

Our method is useful in studying niche market segments that are difficult to analyse using the standard methods.

We provide **unique market development forecasts** taking into account economic, technological and social perspectives. We identify the main trends and events driving market changes in the short and long term.

Our **multidisciplinary team** consists of sociologists, economists, econometricians, and qualitative and quantitative researchers.

We have a comprehensive outlook on the markets and thus provide companies with information necessary for strategic planning of their operations.



Details about the report



Main objective

A comprehensive analysis of the dietary supplement market in Poland and presentation of forecasts for its development.

Additional objectives

- to prepare development **forecasts** for individual distribution channels
- to define **sales volumes** of individual product categories in the different distribution channels

Time span: 2017-2021

Forecast period: 2022-2027

Geographic coverage: Poland

Material scope:

Detailed product categories:

- Probiotics
- Vitamin D
- Products with omega fatty acids and fish oils
- Magnesium, including combined with B6 and potassium
- Baby milk, i.e. milk replacers, baby formula
- Preparations used to improve the condition of joints, bones and muscles (e.g. containing collagen), but not magnesium or potassium
- Sore throat and hoarseness lozenges
- Liver protection preparations, also based on thistle and artichoke
- Nervous system products (sleep aids, tranquillisers and antidepressants)

- Urinary tract preparations, also based on cranberry
- Preparations improving the condition of hair, skin and nails, e.g. based on collagen, horsetail, beta carotene, biotin, etc.
- Multivitamin, vitamin, mineral preparations, excluding magnesium and vitamin D
- Hemp products (CBD-based): oils, drops, supplements.

Subject scope:

- market size in terms of value and volume
- breakdown of total sales value for the market by distribution channels: sales in pharmacies, online stores, online pharmacies, grocery stores, health and beauty stores, herbalists and herbal and medical stores, sports stores and stores selling nutrients for athletes.

Details about the report

- forecasts for the entire market and for sales channels: pharmacies, online stores, online pharmacies, offline stores
- product categories: 11 categories by sales channel; in addition, top 30 product categories in pharmacies: for each, rankings of manufacturers and products in terms of value and number of packets sold; the most promising dietary supplement categories in the coming years
- information on major players
 - company profiles:
 - headcount
 - bestselling products
 - sales structure
 - newly marketed products
 - financial results, strategies

- most active companies in terms of newly launched products
- acquisition activity (past and planned)
- investment in manufacturing (past and planned)
- investment in interesting supplements (planned)

Distribution

- development of distribution channels
- share of different distribution channels and forecasts until 2027:
 - pharmacies
 - online stores
 - online pharmacies
 - grocery stores, health and beauty stores, specialised dietary supplement stores, herbalists and herbal and medical stores, sports stores

Consumer characteristics

- demographic and psychographic features
 - gender
 - age
 - education
 - place of residence
 - income
- consumer preferences: planned purchases of dietary supplements from each category
- behaviour changes due to the coronavirus pandemic



Details about the report

Sources of data in the report

Figures for the **value of the market** and **forecasts** were prepared based on data from primary and secondary sources.

Econometric models based on long-term time series and taking into account macroeconomic indicators, demographics, consumer survey results and interviews with executives of market players (manufacturers and distributors of dietary supplements) were used to prepare forecasts and estimates.

Primary sources

- **Qualitative study:** 100 individual structured interviews with executives of distributors and manufacturers of dietary supplements (cyclical study since 2007)
- **Survey** of a nationwide sample of adult Poles, n=1,000 (layer sampling, cyclical survey since 2016)
- **Survey** of a sample of Poles buying specific categories of dietary supplements, n=1,500 (layer sampling).

Secondary sources

- **Financial statements and reports** of distributors and manufacturers of dietary supplements (cyclical monitoring)
- Data from statistical offices (**GUS, Eurostat**) and financial institutions (**NBP**), and institutions from the healthcare sector (**Ministry of Health, NFZ**)
- **Monitoring of industry sources** (conference materials, specialist journals and portals).

PMR's dietary supplement market database has been regularly expanded and used since 2006.





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