

Category Shaping Trends

The global pre-natal and fertility supplements market is steadily expanding and gaining complexity, propelled by several driving factors.

Key Trend



Absolute pregnancies remain significant, but geo dynamics are shifting: The pregnancy volume-value equation is shifting. Up to 2050 Africa and India will become the epicenter for the volume of pregnancies whilst the rest of the world transitions to increasing spend per pregnancy

Increasing Fertility Challenges: Fertility challenges are rising as parents delay childbirth into their 30s and 40s, with stigma and environmental pollutants further impacting fertility and pregnancy

Modern Parenthood: Parenthood is changing, influenced by parents' age, technology, education and cultural shifts (Gen Z and Gen Alpha).

Nutrient Insecurity: Malnutrition worsened by climate/economy

Modern HCP Engagement: Younger healthcare professionals seek digital, evidence-led, and inclusive brand partnerships.

Implications



Focusing solely on birth rates limits growth potential. We need to evolve into a dual approach:

1. High birthrate markets offer opportunities to increase brand penetration.
2. Low(er) birthrate markets allow for greater spending per pregnancy - as average spend now exceeds \$1,400 (excluding ART) for fertility and optimal health. Elevit's geo expansion needs to follow the shifting global populations trends

Fertility is emerging as the key category entry point for Elevit's long-term growth, especially as supporting pregnancies in older age (35+) becomes crucial in developed markets. Education about reproductive health and earlier planned pregnancies is increasingly important. Infertility's stigma and emotional toll highlight the need for supportive ecosystems.

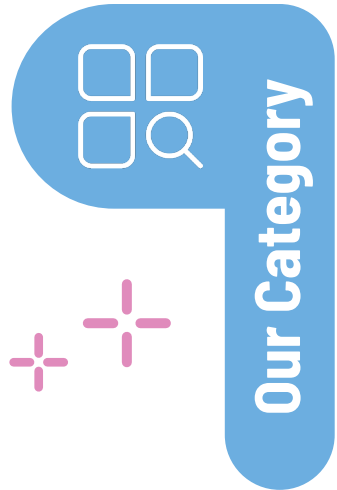
Brands must be credible, values-driven, and foster a sense of community for Gen Z and Gen Alpha parents addressing the dynamics of evolving parenthood

Elevit should stay relevant by engaging digitally and responding to new parenthood trends

A universal need for improved nutrient intake during pregnancy and in infants first 1000 - 2000 days to offset deficiencies and leverage global MMS policy shifts for new access

1-1 HCPs detailing is becoming obsolete in terms of reach and ROI. Elevit needs to evolve its equity and HCPs engagement model to be relevant to the new generations of HCPs and winning with mobile-first, evidence-led, inclusive HCP engagement

Elevit Strategic Context at a glance



→ The prenatal supplements market size is **estimated at €1.6 billion in 2023** and is expected to reach **€ 2.3 billion by 2033, advancing at a +2.7% CAGR (2028-2033)**¹. The growth is fueled by rising maternal health awareness, delayed pregnancies, and the increasing role of supplementation in preventive care.

→ **Consumers increasingly view prenatal nutrition as essential healthcare**, not optional wellness. This shift is reshaping the competitive landscape, where pharma-backed brands and digitally native disruptors compete on efficacy, format innovation, and trust

→ Fertility is an emerging category (~€0.5 bn in 2024) growing at ~+14% CAGR, **fueled by rising infertility rates, delayed parenthood, lifestyle changes, & adoption of Assisted Reproductive Technology (ART)**². Fertility supplements are becoming a core part of preconception care, bridging the gap between lifestyle challenges and clinical interventions

→ **The category is shaped by millennial and Gen Z consumers, who demand personalized, clean-label, and gender-specific formulations.** Key ingredients like myo-inositol, CoQ10, zinc, selenium, and folic acid are gaining traction for their roles in egg and sperm health. Male fertility supplements are the fastest-growing segment, reflecting broader awareness and destigmatization



→ **Our historic focus on countries with high birth rates and affordability means we're not meeting the needs of millions of families globally.** Currently, Elevit is only available to 25 million of the world's 160 million pregnancies each year—despite 120 million being planned and addressable.

→ Traditional one-on-one Healthcare Professional (HCP) detailing is costly and under pressure, **leading to challenges in driving recommendations and prescriptions as Elevit is heavily reliant on doctors' recommendations and prescriptions**

→ Despite Elevit's strong clinical credentials and leadership in prenatal nutrition, **the brand is experiencing increasing competitive pressure from both established and emerging players**

→ Elevit's global footprint remains highly concentrated, **with 80% of net sales generated in just five markets—China alone accounts for over half of total sales.**³ This concentration exposes the brand to significant risk, especially as key markets like China face demographic headwinds such as declining birth rates and an aging population

Elevit Growth Audience Strategy



By addressing the needs of our Growth Audience and its relevant sub-segments in all demand spaces and stages of the Life Forming Journey, we ensure clear growth opportunity for the brand

 **CATEGORY USERS & PROSPECTS**

ALL Parents and Parents-to-Be


Buying or open to buy supplements to support their journey from fertility to kids development

→ USERS | NON-USERS

 **GROWTH AUDIENCE**

Parents who "FORM LIFE"

They want to do everything they can to support their journey in forming new life – from the time they plan to conceive to the early years of development. As the journey comes with moments of doubts and constant worries, they need reassurance through credible science and authentic engagement

 **SUB SEGMENTS**

FERTILITY
Preparing for New Life

PREGNANCY
Nurturing & Growing New Life

POST PARTUM
Nourishing New Life & Bonding

INFANTS (0-2)
Building & Shaping Life

KIDS (2-5)
Strengthening & Cultivating Life

Couples

Mothers (to be)

Infants

Kids

 **ADDRESSABLE AUDIENCE**

WIP



Elevit's renewed strategy moves away from a narrow focus on only high birthrate markets, towards maximizing total category value

FROM

A **premium brand** that has chosen to focus on **fetal protection** and is restricted by its own now incongruent parameters of pursuing markets with a unique combination of **affordability and high birth rates**



TO

The **universal brand of choice** that supports a **healthy life forming journey** from the moment parents start planning (fertility), through their journey (pre - post natal) and through their child's formative 2000 days to provide the best life chances **in both developed and emerging markets**

BY



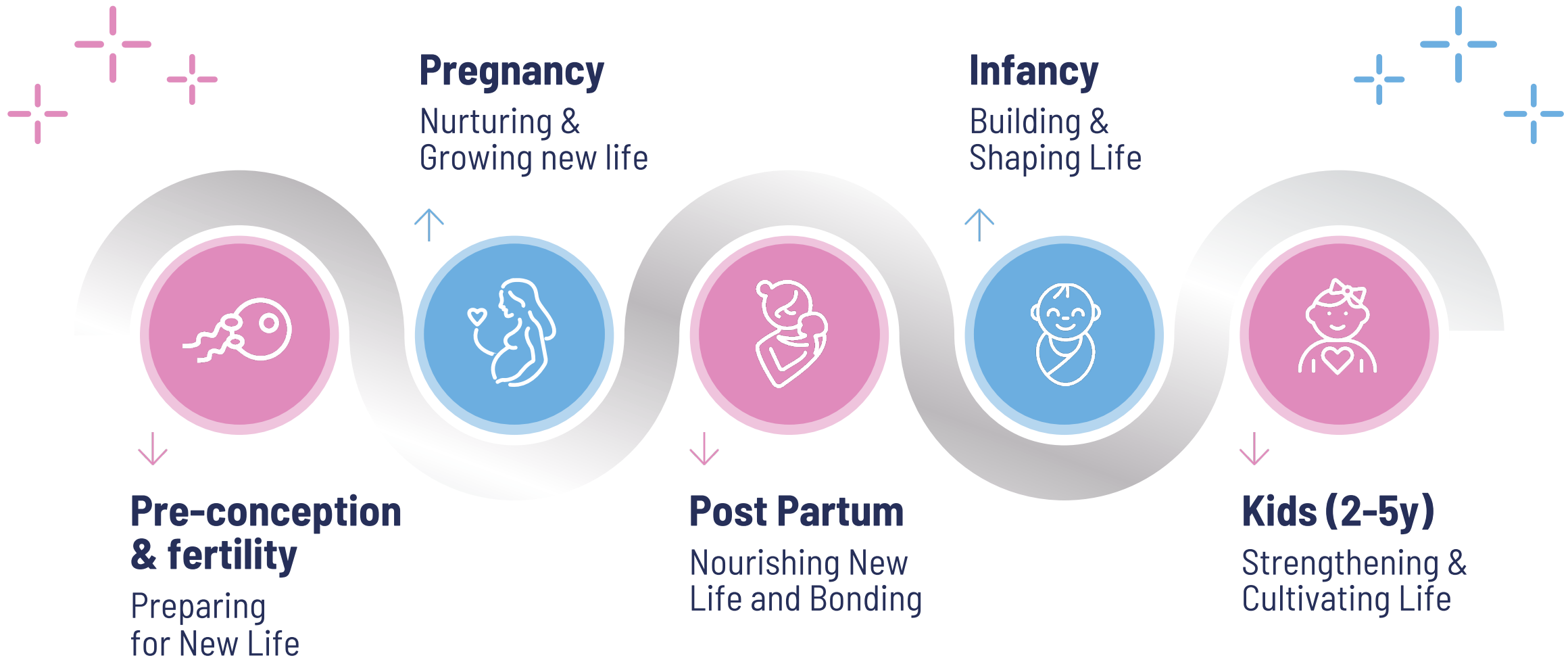
Expanding from high birthrate focus to total category value, including Fertility and the full parenthood journey

Broadening support from fetal protection to the entire Life Forming Journey, matching evolving parental needs

Increasing market penetration by targeting more pregnancies in both low and high birthrate markets



Based on latest CSJ, trends and market understanding, we have defined territories where Eelvit has the right to play and win



We also defined where **NOT** to play

In line with Elevit's ambition to be the brand of choice that supports a healthy life forming journey from Fertility through child's formative years



We do not play in segments that do not have an impact on the new life

Everything we do MUST support / form new life. If a segment / territory doesn't directly help form a new life, it's not for Elevit



We do not play in Women's health segments - We are Life Forming Brand

We do not play in Mum's beauty segment (i.e. stretchmarks, hair loss, menopause). All Elevit products must have an impact on fetus (before and after conception), infant or a kid



We don't play in territories that do not have a clear medical needs

Mass market offerings (ie. sanitary pads) are out of scope, as unsupported by our business model and standing further away from the health space

Our top strategic priorities to win

GLOBAL STRATEGIC PRIORITIES

Drive Fertility as Growth Engine

- **Expand into low(er) birthrates** markets, leveraging Fertility as category entry point
- **Activate Elevit 1:** Win in the short term by communicating its benefits in supporting healthy conception & fertility
- **Educate:** Collaborate with HCP to promote fertility education and resources, establishing Elevit as a trusted partner
- **Build pipeline of clinicals & NPDs** to promote fertility (assessing the role of IVF as per Japan case)

Reestablish Brand Superiority

- **Portfolio expansion** to address underserved and/or unmet medical/consumer needs
- Building a **roadmap of continuous upgrades** to our core proposition, claims, clinicals, diagnostics and hardware to secure superiority
- Clear **evidence generation strategic plan** to keep/strengthen our scientific credentials with HCP and consumers
- **Upgrading HCP and Consumer Activation Models** to adapt to a more competitive landscape

Adapt Equity to Modern Parenthood

- **Revamp brand equity** to inject more authenticity into the brand while staying true to its science heritage
- **Update Brand Visual World** and develop **Brand Platform Idea** to reflect desired equity changes
- Develop **digital-first marketing strategies** that connect with new generation of parents
- **Evolve brand positioning** from **"pregnancy" to "life forming"** in line with the expansion to fertility

Expand to LIC Through MMS

- **Leverage the Highways** initiative to launch transformational business models that drive MMS penetration in LIC markets
- **Develop a sub-brand** that will carry LIC Proposition, providing a clear differentiation vs. Premium Elevit (for HCPs and Consumers) – prevent any potential cannibalization
- **Nurture strategic partnerships** with governments and NGOs (Vitamin Angels) to advocate for MMS adoption
- **Implement educational initiatives** to raise awareness about the importance of MMS for maternal and infant health

Win with Contemporary HCP profiles

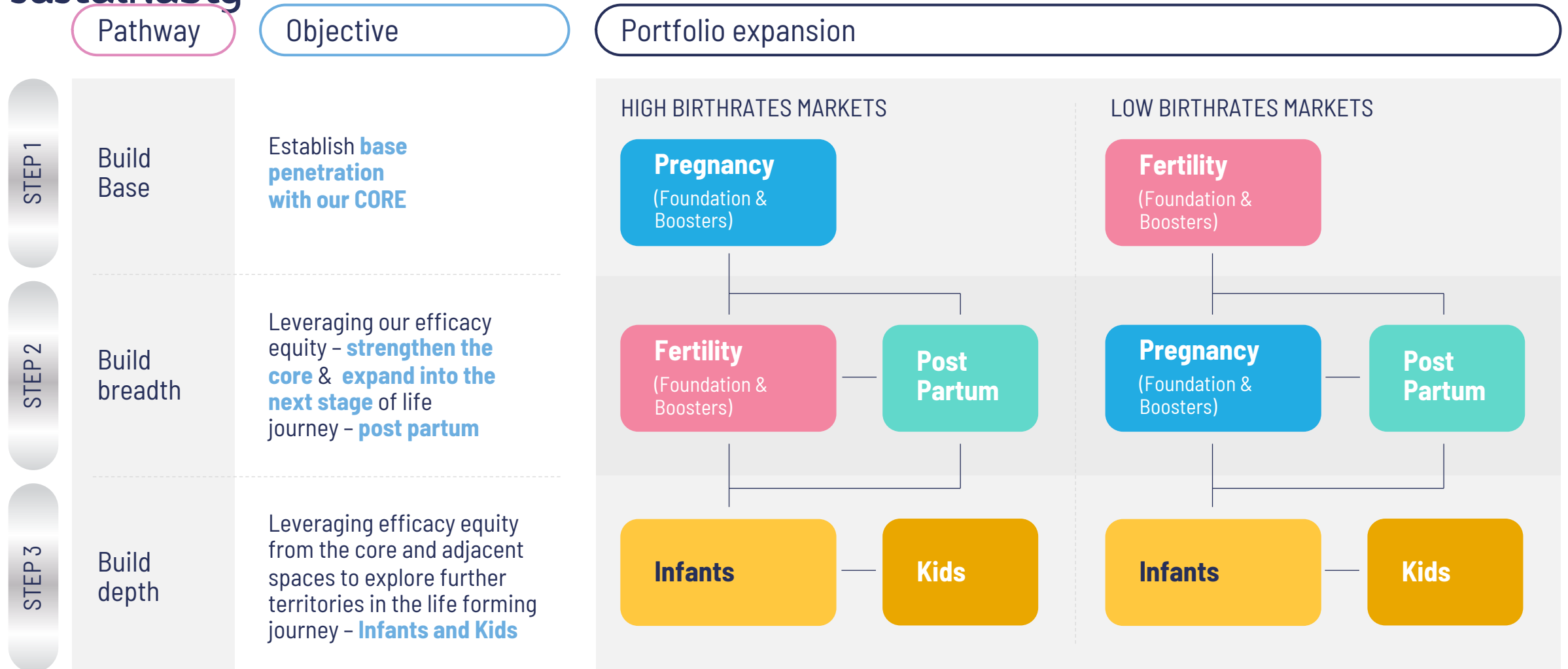
- Develop a new HCP engagement model** to replace costly 1-1 detailing and enable broader geographic expansion by:
 - **Engaging early-career physicians-** Partner with residency programs
 - **Leveraging digital technology:** Use advanced platforms to connect with the new generation of HCPs
 - **Leading with transparency and evidence**
 - Transforming congresses into content engines
 - **Increasing investment in clinical studies:** Step up support for research and evidence generation to reinforce scientific leadership

Whilst Reestablish Brand Superiority (SP:2)

Adapt Equity to Modern Parenthood (SP:3) and Win with Contemporary HCP profiles (SP:5) are relevant for all markets, and will need to be executed across the regions, Strategic Priorities 1 & 4 (Drive Fertility as Growth Engine & Expand to Emerging Markets & LIC Through MMS) need to be **tailored for specific market archetypes**, based on the following criteria

	Drive Fertility as Growth Engine	Expand to Emerging Markets & LIC Through MMS
Market Dynamics	→ Low(er) birthrates markets	→ High(er) birthrates markets
	→ Increasing fertility challenges	→ Policy change is under consideration
	→ Social stigma associated with the ability to conceive	→ There's a network of potential partners to support with last-mile penetration distribution
	→ Culture of researching and preparing for possible parenthood	→ Healthy pregnancies are challenged by poor nutrition, changes in environmental factors, economic challenges.
	→ High propensity and willingness to spend on "best self-health" as a foundation for a healthy journey to parenthood and giving baby the best start in life (incl. across 2000 days)	→ HCP access is challenged but essential to support a healthy pregnancy → "Proxy" HCPs (eg midwives) have high trust with target consumer
	→ Blend of good, accessible private and public healthcare	→ Public sector tenders for high volume sales potential → Preferable but not essential: potential to launch Elevit to a complementary private healthcare channel
		→ HCP endorsement adds tangible credibility to brands
Possible markets	→ China, Mexico, Russia, Australia, Switzerland, Germany and the rest of EU markets, Japan (continued)	→ African Markets, ASEAN, Pakistan, Bangladesh, Middle East, LATAM

New Elevit's Growth Strategy relies on an ambitious geo expansion. Therefore, we have created a Market Development Model that codifies the path to drive growth successfully and sustainably



AMBITION

Be the brand of choice that supports a **healthy life forming** journey from Fertility through child's formative years (first 2000 days)

STRATEGIC TERRITORIES OF CHOICE

Demand Spaces: Fertility & Preconception, Pregnancy, Post Partum, Infants, Kids



Geographic Presence: APAC, LATAM, EMEA



Audience: Parents and parents-to-be who want to do everything in their power to conceive and give their baby the best start in life

BRAND DEVELOPMENT MODEL

STEP 1 BUILD BASE

Establish base penetration with our CORE (Pregnancy or Fertility) based on your market archetype



STEP 2 INCREASE PRESENCE

Strengthen the core & expand into the next stage of life journey - Post Partum



STEP 3 EXPAND CATEGORY

Explore further territories in the life forming journey - Infants and Kids

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