Food Supplements in Europe

Market Overview & Consumer Behaviour Insights

A standalone report based on an AESGP-EPPA study

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The views expressed in this report are, unless otherwise stated, those of the authors and do not necessarily represent any official view of AESGP and/or any other organisation mentioned in this report. EPPA SA/NV has relied on data provided by AESGP members, a consumer survey completed by 6,000 respondents, and publicly available data.

Executive Summary

This report has been prepared by EPPA SA/NV on behalf of AESGP, the Association of the European Self-Care Industry. It presents the findings of an AESGP-EPPA study on **food supplements containing vitamins and minerals in Europe**, focusing on the **market** and **consumer behaviour**. The geographical scope is the European Economic Area (EEA). The analysis is based on desk research, a questionnaire distributed to eleven manufacturers and distributors of food supplements, and a consumer behaviour survey completed by 6,000 respondents. This document is designed as a self-contained report.

Market overview

The manufacturers and distributors of food supplements who participated in the questionnaire:

- Have an indicative **market share** of approximately **65%** (EEA market of food supplements);
- **Employ** more than **4,000** full-time equivalents (FTEs) directly related to food supplements (FTEs);
- Generate an aggregated **annual turnover** of approximately **1.3 billion EUR** from food supplements;
- Operate **manufacturing plants** in **nine** EEA countries and **ten** non-EEA countries;
- Place a minimum of **2,500** different food supplements **products** (i.e., end products in terms of stock-keeping units) on the market, including tablets, (soft gel) capsules, gummies, syrups, and powders in small dosage units;
- Distribute their products to **more than 71,000 downstream companies** in the EEA (conservative estimate);
- Target diverse **consumer groups** – adults, adolescents, and children – often addressing specific health needs or life stages (e.g., menopause, bone health, energy levels);
- Identified **Vitamin C, Vitamin D, Vitamin B6, Vitamin B12, and Folic Acid** as the **most important vitamins** in their product portfolios;
- Identified **Magnesium, Zinc, Calcium, Iron, and Selenium** as the **most important minerals** in their product portfolios.

The typical value chain of food supplements:

- **Spans multiple stages**, from raw material sourcing and manufacturing to labelling and distribution;
- **Involves a wide range of actors**, such as raw material suppliers, packaging manufacturers, third party contractors, distributors, and retailers;
- **Engages numerous small and medium-sized enterprises (SMEs)** across the entire value chain.

Looking ahead, the participating companies anticipate **an average sales growth of approximately 5%** over the next five years. This growth is based on various drivers: **product innovation** (e.g., new product formats, personalised nutrition), **e-commerce expansion** (broadening geographic access), **diet shifts** (e.g., plant-based diets that may lead to micronutrient gaps), rising **self-care and health awareness**, and **demographic trends** (e.g., ageing populations).

Consumer behaviour insights

55% of all contacted consumers purchase food supplements – these consumers represent the 6,000 individuals who completed the survey; consumers who do not purchase food supplements were filtered out. Nearly two-third of food supplement consumers **use food supplements daily** (62%) and the majority indicated that food supplements are **important** for them (82%). The leading reasons to use food supplements – to support **overall health** (63%) and **immunity** (52%) – suggest that prevention is a key reason for consumption, while a sizeable group also **target specific health conditions** (30%).

Health professionals play a key role: 34% of consumers received recommendations from a healthcare practitioner (i.e., doctors and nurses) to use food supplements, making them the most common source of recommendations. In addition, when buying food supplements, 70% of consumers pay **attention to information about vitamins and minerals levels per daily dose**, suggesting strong awareness in terms of decision-making. Healthcare practitioners are also the most common source of recommendations for specific levels (33%), followed by users' own research (32%).

Perceptions in terms of **safety, quality, and information clarity** are broadly favourable – **78%** are confident in the safety and quality of food supplements; **72%** find the ingredient information on supplement labels easy to understand; **66%** feel sufficiently informed about the levels of vitamins and minerals per daily dose.

By presenting market evidence and consumer insights, this report highlights the key role of food supplements in supporting prevention and self-care in Europe.

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1. Introduction

This report has been prepared by EPPA SA/NV on behalf of AESGP, the Association of the European Self-Care Industry. It presents the findings of an AESGP-EPPA study on **food supplements containing vitamins and minerals in Europe**, focusing on the **market** and **consumer behaviour**. It is based on desk research, a questionnaire distributed to eleven manufacturers and distributors of food supplements, and a consumer behaviour survey completed by 6,000 respondents.

Regulatory context

In the European Union (EU), food supplements are **regulated as food** under the General Food Law: **Regulation 178/2002/EC**.[1] The **main EU legislative text** specifically regulating food supplements is **Directive 2002/46/EC**,[2] which defines the rules for the composition and labelling of food supplements. Annex I of the Directive lists the vitamins and minerals which may be used in the manufacture of food supplements and Annex II specifies the permitted sources of those nutrients. This framework establishes the basis for both consumer protection and internal market harmonisation, ensuring that products are safe, traceable, and appropriately labelled.

Policy context

Nutrition remains a central **global and European health priority**, with persistent hunger, malnutrition, and micronutrient deficiencies still hindering progress towards the **United Nations' 2030 Sustainable Development Goals**, in particular *Zero Hunger*. In Europe, poor diets continue to drive non-communicable diseases and exacerbate malnutrition. Major EU initiatives – including **EU4Health**, **Europe's Beating Cancer Plan**, and the **Farm to Fork Strategy** – acknowledge the role of balanced nutrition in disease prevention and healthy ageing. Nevertheless, gaps in nutrient intake remain widespread.

Against this backdrop, food supplements provide a significant tool to help bridge nutritional gaps, support healthy ageing, and strengthen resilience against diet-related diseases. By complementing dietary intake, food supplements contribute to public health objectives. Understanding their market dynamics and consumer perceptions is therefore essential to inform evidence-based decision-making and support responsible self-care practices across Europe.

[1] Regulation (EC) No 178/2002 of the European Parliament and of the Council of 28 January 2002 laying down the general principles and requirements of food law, establishing the European Food Safety Authority and laying down procedures in matters of food safety.

[2] Directive 2002/46/EC of the European Parliament and of the Council of 10 June 2002 on the approximation of the laws of the Member States relating to food supplements (Text with EEA relevance).

2. Overview of the EEA food supplement market and value chain

This section provides an overview of (A) **key economic figures related to the participating companies**, (B) **food supplements placed on the European market**, (C) **value chain of food supplements**, and (D) **key market trends**, notably the key drivers of demand.

2.1. Methodology

This section is based on data gathered from AESGP members via a detailed questionnaire and desk research. A total of eleven **manufacturers and distributors of food supplements** contributed to the questionnaire (also referred to as "participating companies"). Data gathered has been aggregated and anonymised.

From a geographical perspective, this report focuses on the **European Economic Area (EEA)**, comprising the European Union (EU-27), Iceland, Liechtenstein, and Norway. The reference year for data gathering via the questionnaire for the participating companies is **2023**.

2.2. Profile of the participating companies

Core business activities

Most participating companies operate in both the **food supplements** and **pharmaceutical market**. Some sell food supplements directly under their own brand, while others supply products to third parties for private labelling. Several rely on external partners to produce certain food supplement products within their product portfolio. **Distribution channels are diverse**, ranging from pharmacies and specialised retailers to supermarkets and e-commerce platforms.

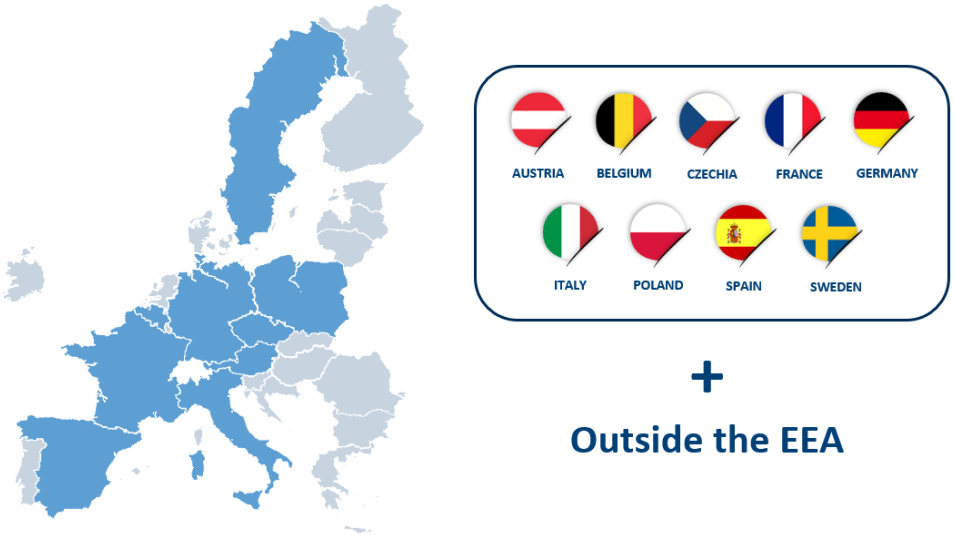
Market footprint

- ✓ **Market share:** The participating companies have an indicative market share of approximately 65% of the EEA food supplements market.
- ✓ **Employment:** The companies employ around 20,500 full-time equivalents (FTEs) across the EEA, of which approximately 4,150 are directly engaged in the manufacturing and supply chain of food supplements.
- ✓ **Turnover:** In 2023, the companies reported an aggregated annual turnover of approximately 1.3 billion EUR from food supplements containing vitamins and minerals.

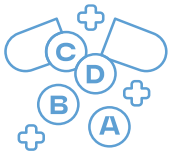
- ✓ **Importance of food supplements:** Food supplements account for 41 to 50% of the companies' overall product portfolio and 31 to 40% of the companies' overall turnover. This underlines the strategic significance of food supplements for the participating companies.

- ✓ **Manufacturing:** Production facilities are spread across nine EEA countries (Austria, Belgium, Czech Republic, France, Germany, Italy, Poland, Spain, Sweden) and ten non-EEA countries (Argentina, Brazil, Canada, China, Indonesia, Morocco, South Africa, Taiwan, United Kingdom, United States). The countries with manufacturing plants are illustrated in Figure 1.

Figure 1. Locations of the participating companies' manufacturing plants in the EEA



2.3. Food supplements placed on the EU market



The participating companies place a minimum of **2,500 different food supplement products** (i.e., end products in terms of stock-keeping units, SKUs) on the market in the EEA, based on **at least 1,000 unique formulations**. These products are marketed in diverse formats, including but not limited to tablets, (soft gel) capsules, gummies, syrups, and powders in small dosage units – reflecting both consumer preferences and innovation trends. The products are designed for **adults, adolescents, and children**, often tailored to **specific life stages or health needs,** such as menopause, pregnancy, bone health, immunity, and energy management.

The number of products and their positioning highlights the sector's ability to address both general wellbeing and targeted health concerns, while adapting to consumer preferences.

2.3.1. Importance of vitamins and minerals used in food supplements

The participating companies were asked to rank vitamins and minerals according to importance for their business, from 1 (most important) to 5 (less important). The companies defined "importance" according to their most suitable indicator (e.g., volumes, sales). The companies' responses have been aggregated to provide an **overall ranking of importance** using the Borda method, which is a positional voting rule. One of the companies did not provide a ranking; the data reported therefore presents the aggregated ranking for ten out of eleven participating companies. The vitamins/minerals are based on the list of authorised vitamins and minerals in food. We report the top five most important vitamins and minerals in Table 1 and Table 2, respectively. In addition, we list key sub-population groups that correspond to the respective vitamin/mineral, as reported by the participating companies.

Most important vitamins

Table 1. Aggregated importance of vitamins for the participating companies from 1 (most important) to 5.

Rank	Vitamin	Key sub-populations
1	**Vitamin C**	active individuals, consumers managing specific health areas (e.g., ophthalmology, menstrual cycle, and immune system support), elderly people, children, active individuals
2	**Vitamin D**	consumers managing specific health areas (e.g., ophthalmology, immune system, and bone health support), elderly people, pregnant women, children, active individuals
3	**Vitamin B6**	consumers managing specific health areas (e.g., cardiovascular support)
4	**Vitamin B12**	vegans, vegetarians, active individuals
5	**Folic acid**	pregnant women, children

Most important minerals

Table 2. Aggregated importance of minerals for the participating companies from 1 (most important) to 5.

Rank	Vitamin	Key sub-populations
1	**Magnesium**	active individuals, elderly people, pregnant women, consumers managing specific health areas (e.g., cardiovascular, musculoskeletal, immune system, mental health, sleep, and bone health support), active individuals
2	**Zinc**	active individuals, consumers managing specific health areas (e.g., cardiovascular, ophthalmology, immune system, and menstrual cycle support), elderly people, children, vegans, vegetarians
3	**Calcium**	active individuals, consumers managing specific health areas (e.g., immune system and bone health support), elderly people, active individuals, children
4	**Iron**	pregnant women, vegans, active individuals, vegetarians, elderly people
5	**Selenium**	active individuals, elderly people, consumers managing specific health areas (e.g., ophthalmology support), children, vegans, vegetarians

2.3.2. How do the participating companies determine the dosage of vitamins and minerals in food supplements placed on the market?

Companies determine dosage levels in their products based on a combination of scientific and regulatory parameters: **clinical evidence on efficacy and safety for target populations**. This includes sensitive groups with specific nutritional requirements, such as children, pregnant women, and older adults. This aligns with the European Food Safety Authority's (EFSA) Tolerable Upper Intake Level (UL), national recommendations and guidelines, as well as requirements for **health claims** and **nutrient reference values (NRVs)** established at EU level.

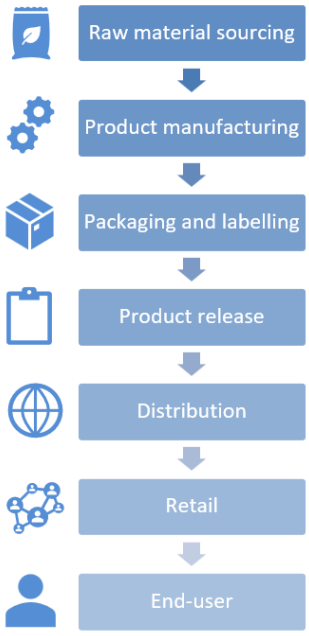
In addition, formulation decisions also consider factors such as **bioavailability, absorption rates, safety profiles of specific micronutrient forms, and potential synergies and interactions** between micronutrients. Consumer expectations and consumer preferences, including trends such as vegan formulations or clean-label products, are also factored into formulation decisions.

This approach enables the companies to establish **optimal dosages for each ingredient** that both **address the needs of different target populations and ensure compliance with legal limits**. The participating companies also conduct regular reviews of emerging scientific research, regulatory developments, and changes in dietary patterns. This ongoing refinement process allows them to adjust formulations to meet evolving health needs across demographics and continue supporting overall health and well-being in line with market and regulatory expectations.

2.4. Value chain overview

The food supplements value chain comprises multiple steps, as illustrated in Figure 2.

Figure 2. Typical value chain of a food supplement product.



The steps in the value chain are carried out either internally by the participating companies or outsourced to **third party contractors**. These contractors provide a range of services, including product development, manufacturing, packaging, and distribution. They are located in numerous EEA countries, including Austria, Belgium, Croatia, Czech Republic, Denmark, France, Germany, Italy, Poland, Portugal, Romania, Spain, Sweden, and the Netherlands. The specific steps in the value chain are described below:

- **Raw material sourcing.** The participating companies source materials from vendors within and outside the EEA. This includes packaging sourcing.
- **Product manufacturing.** Food supplements are manufactured and packaged at plants within and outside the EEA. Figure 1 provides an overview of the participating companies' manufacturing plants. Most of the participating companies also reported that they are involved in product formulation, which occurs before product manufacturing.
- **Packaging and labelling.** Prior to product release, the products are packaged and labelled.
- **Product release.** This includes analytical testing according to product release specifications.
- **Distribution.** The end-products are supplied to local distributors and/or warehouses in the targeted market (e.g., via affiliate companies) or directly to retailers (e.g., pharmacies, grocers, e-commerce) and wholesalers (e.g., pharmaceutical wholesalers). The products are then sold to the final consumer. As noted above, a number of the participating companies distribute their products to other companies in the value chain, who, in turn, place food supplements on the market, often using a private label.

It is estimated that the participating companies' food supplements are distributed to more than **71,000 downstream companies in the EEA** (conservative estimation).[3] This should be considered as the minimum (lower bound), since a number of participating companies indicated that they were not able to provide this information.

The role of SMEs

Small and medium-sized enterprises (SMEs) are involved across the entire value chain. SMEs are involved as raw material suppliers, packaging manufacturers, end-product manufacturers, wholesalers, and retailers, such as pharmacies and specialised stores. Some SMEs sell products directly to consumers via e-commerce channels. In addition, some SMEs provide support for manufacturers via certain short-term engagements, such as specialised laboratory analyses, quality control services, and logistics. Their involvement contributes not only to the flexibility and resilience of the value chain but also to regional economic development and innovation, as many SMEs bring niche expertise and adaptability to evolving market and regulatory demands across different EEA countries.

[3] In this context, downstream companies are defined as the direct customers of the participating companies. These downstream companies are legal entities, such as retailers and wholesalers, and may also distribute food supplements to other companies in the value chain.

2.5. Market trends: key drivers of demand

The participating companies anticipate an **average increase in sales of food supplements of approximately 5% over the next five years**. According to the companies, the key drivers of this growth are:

- **Innovation and new product launches.** The continuous development of new formulations and product forms, such as gummies, attract new consumers and meet specific health needs. There is also a growing focus on personalised nutrition solutions catering for diverse population needs.
- **Wider (geographical) distribution of products via e-commerce growth.** E-commerce platforms allow manufacturers and retailers to reach consumers more directly. The COVID-19 pandemic fuelled this growth and helped normalise online purchase of supplements.
- **Consumer trends regarding more sustainable diets (e.g., plant-based)**. Vegetarian and vegan diets are increasingly popular in Europe, boosting demand for supplements that address potential micronutrient gaps.
- **Increasing consumer self-care and health awareness (e.g., focus on personalised nutrition according to individual needs).** Food supplements are often viewed by consumers as part of everyday self-care routines. Personalised solutions and products targeting immunity, gut health, and cognitive performance are key in this regard.
- **Demographic trends, such as ageing populations.** The ageing of Europe's population is a defining demographic trend, with significant implications for society and the economy. At the same time, younger consumers are increasingly interested in wellness and prevention, fuelling new demand.
- **Scientific validation and regulatory developments.** Consumers are increasingly seeking products supported by scientific evidence and authorised health claims, while upcoming EU regulations on micronutrient levels and labelling are shaping product reformulation and innovation.

At the same time, some companies reported a decline in sales over the next five years, citing:

- **Market saturation.** The introduction of new products and brands, as well as e-commerce growth, leads to a highly competitive market.
- **Price pressure in the food supplements sector.** This can be attributed to an increasingly saturated market.
- **Consumer scepticism.** The lack of trust or the spread of misinformation among consumers can hinder the adoption of food supplements, highlighting the need for credible scientific evidence and transparent communication.
- **Rising raw material and production costs.** Global supply chain disruptions, increased transportation costs, and the rising cost of sustainably sourced ingredients are putting pressure on profit margins, potentially limiting product availability and affordability in some markets.

The food supplements market is expected to continue growing, supported by product innovation, expanding e-commerce channels, an increased focus on self-care, and demographic changes such as ageing populations. At the same time, factors such as market saturation, price competition, consumer scepticism, and rising production costs are expected to present challenges. Scientific substantiation and regulatory alignment remain essential to maintain consumer confidence and market stability.

3. Consumer behaviour insights

A public consumer survey was conducted to gather information about consumer behaviour and preferences regarding food supplements containing vitamins and minerals. This section provides an overview of the methodology and key findings of this survey.

3.1. Methodology

The consumer survey was conducted in partnership with KANTAR PROFILES[4] to capture usage patterns and perceptions of food supplements in Europe.

A total of **6,000** respondents participated (1,200 per country: **Belgium, Germany, Italy, Poland, and Sweden**). Respondents were eligible to participate if they purchased supplements containing vitamins or minerals for themselves or for their household; **nine out of ten** bought food supplements for their own use.[5]

To ensure representativeness, **gender and age quotas** were applied, including a minimum age of 18 years. The survey was conducted between 26 March 2025 and 11 April 2025, with an **incidence rate of 95**.

Figure 3. Countries where consumers were surveyed.

3.2. Consumers' usage and perceived value

At the beginning of the survey, respondents were asked to select products that were purchased in their household over the last six months (e.g., smartphones, perfumes, cookware products, food supplements). **More than half of the contacted consumers purchase food supplements (55%)** – these consumers represent the 6,000 individuals who completed the survey; consumers who do not purchase food supplements were filtered out. The level of consumption is higher in Italy (72%) and Poland (66%) compared to the other investigated markets. Belgium is the country with the lowest level of consumption (45%).

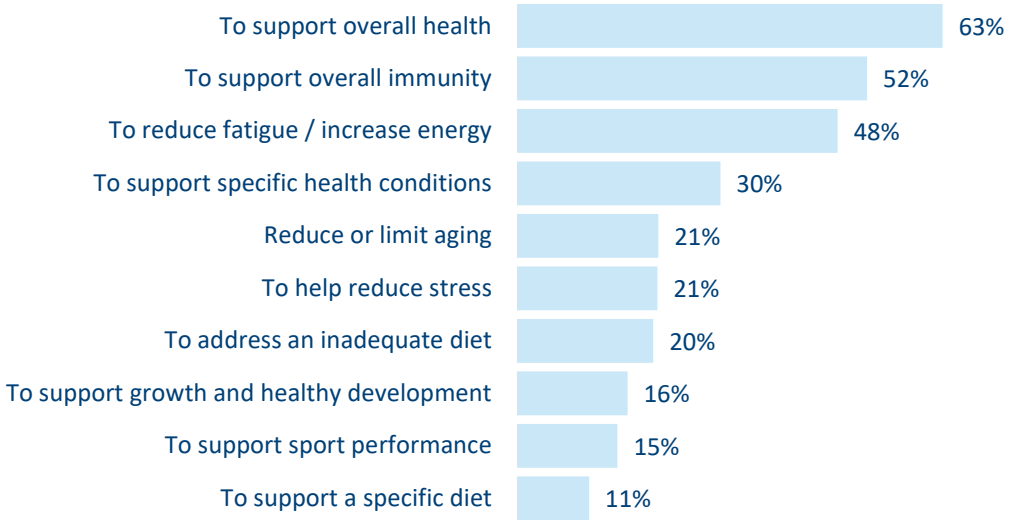
[4] www.kantar.com

[5] 18% buy food supplements containing vitamins or minerals for their partner, 9% buy these food supplements for their child(ren), and 4% buy these food supplements for a parent.

Main reasons for consuming food supplements

The **main reasons for consuming food supplements** are presented in Figure 4. The leading reason for consuming food supplements is to support overall health (63%), with the highest proportion of respondents selecting this answer in Germany and Poland. To support overall immunity is also a main reason in the investigated markets (52%), with a lower share of consumers selecting this option in Italy. Food supplement consumers in Italy are more likely to indicate reduce fatigue / increase energy as one of the reasons for their consumption. Across all markets, 48% selected this reason. In addition, 30% of respondents consume food supplements to support specific health conditions.

Figure 4. The main reasons for consuming food supplements.



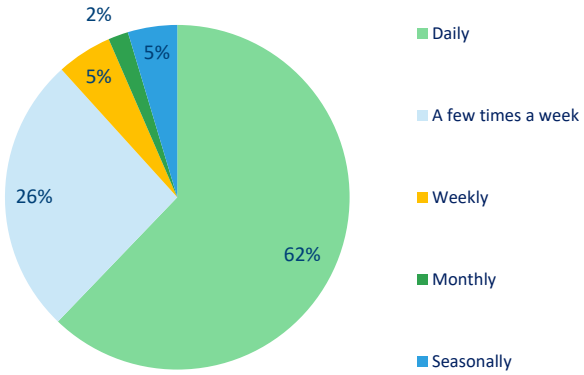
Consumption history

Regarding users' **history of consumption**, 13% have been using food supplements for less than one year and nearly half of users have been consuming food supplements for one year to five years (49%). 18% of consumers have been consuming food supplements for five to ten years, with 17% consuming for more than ten years.

Consumption frequency

Figure 5 illustrates the **frequency of food supplements consumption**. Nearly two thirds of users consume food supplements daily, which is especially the case for Swedish consumers (70%). While it is marginal to consume food supplements once a week or less, Italian consumers tend to use food supplements at a lower frequency compared to the other markets.

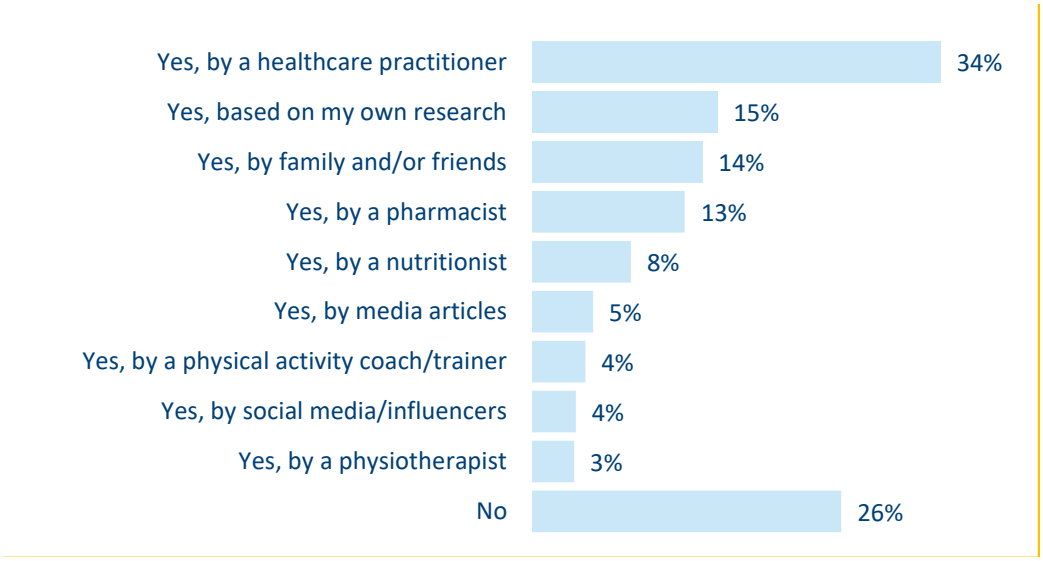
Figure 5. Food supplements consumption frequency.



Recommendations to consume food supplements

Three quarters of food supplement users have been recommended to consume food supplements. This result is even higher in Italy, with more than eight out of ten users having received a recommendation. Recommendations to consume food supplements are mainly provided by a **healthcare practitioner, i.e., doctors and nurses** (this is the case for 34% of users across the respective countries). This is especially the case in Belgium (47%) and Italy (39%), followed by Germany (32%), Poland (29%), and Sweden (24%). Marginally, family, friends, and pharmacists are also sources of recommendations, alongside users' own research. The results are illustrated in **Figure 6**.

Figure 6. Recommendations received for consuming food supplements.



Importance of food supplements

In terms of the **perceived importance of food supplements**, 82% of users indicate that food supplements are important for them. This proportion is even higher among Polish (88%) and Italian (87%) users, followed by Germany (82%), Belgium (79%), and Sweden (76%).

3.3. Consumer perception about the levels of vitamins and minerals per daily dose

This section provides an overview of the survey's key findings related to the levels of vitamins and minerals in food supplements. When answering the survey, consumers were provided with an explanation about these levels (i.e., what they are).

Attentiveness towards levels

When buying food supplements, **70% of buyers pay attention to the information about the levels of vitamins and minerals per daily dose**. This is especially the case in Italy (78%), Poland (78%), and Germany (76%), with more than three quarters of the respondents indicating that they pay attention to this information. Compared to the other countries, consumers in Sweden (58%) and Belgium (62%) pay less attention to the levels compared to the other investigated markets.

Factors influencing decisions about levels

Consumers were also asked about the **factors that influence their decision to consume food supplements with specific levels of vitamins and minerals per daily dose**. Recommendations from a healthcare practitioner (i.e., doctors and nurses) (33%) and users' own research (32%) are the two main influencing factors for specific levels, as illustrated in Figure 7. This in line with the findings reported in Figure 6 related to the recommendations to consume food supplements from healthcare practitioners (i.e., doctors and nurses), regardless of specific levels. Pharmacists also play a role in terms of decision-making about specific levels (22%).

Figure 7. Factors influencing decision – levels of vitamins and minerals per daily dose.

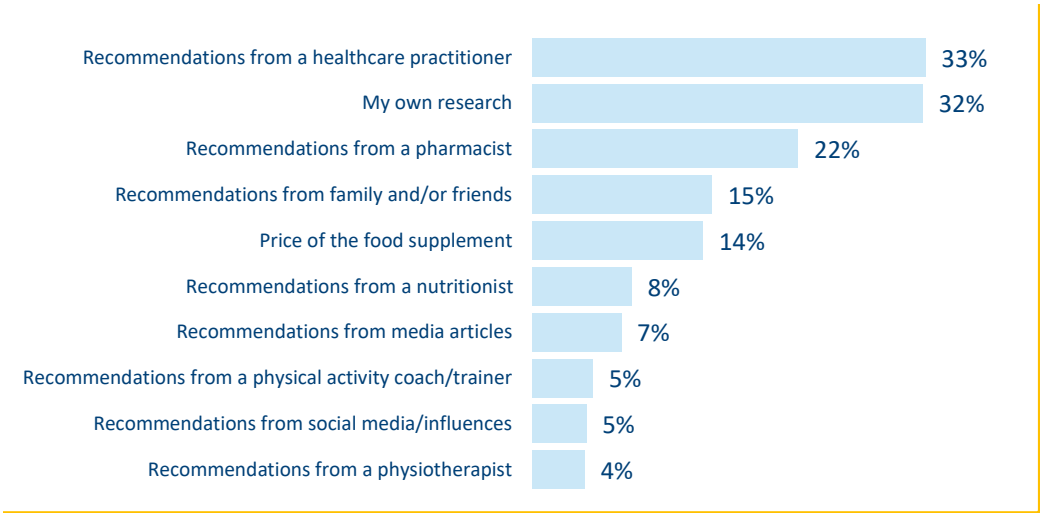


Table 3 provides more information about the top three factors in Figure 7. Recommendations from healthcare practitioners (i.e., doctors and nurses) are a more important influencing factor in Belgium and Italy, while German, Polish, and Swedish users tend to decide more based on their own research. In addition, recommendations from a pharmacist are a more important influencing factor for Italian and Polish users.

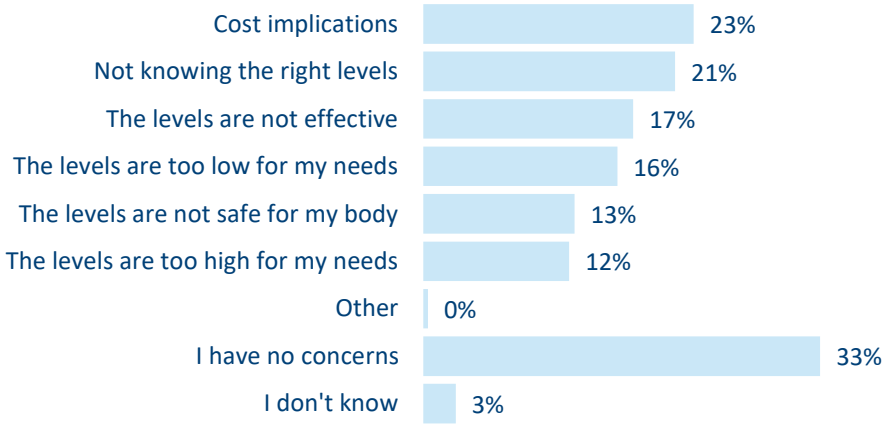
Table 3. Top three factors influencing decision – levels of vitamins and minerals per daily dose.

	Germany	Italy	Poland	Sweden	Belgium
Recommendations from a healthcare practitioner (i.e., doctors and nurses)	29%	40%	27%	26%	42%
My own research	38%	23%	36%	40%	25%
Recommendations from a pharmacist	15%	33%	28%	10%	23%

Concerns about levels

A third of the food supplement users indicate that they have no specific **concerns about the levels of vitamins and minerals per daily dose (Figure 8)**. This observation is the main answer provided in Germany (43%), Italy (35%), and Belgium (35%). However, in Poland and Sweden, the users appear to be more concerned and especially mention the cost implications (28% and 27%, respectively), the levels' effectiveness (25% and 18%, respectively), and not knowing the right levels to use (20% and 26%, respectively).

Figure 8. Concerns about levels of vitamins and minerals per daily dose.



There is a lot of variability across countries regarding **consumers' concerns about taking too much of certain vitamins and minerals in food supplements**. While Italian and Polish users appear to be mostly concerned, the opposite is true in Germany, Sweden, and Belgium. The results are summarised in Table 4.

Table 4. Concerns about taking too much of certain vitamins and minerals in food supplements.

	Germany	Italy	Poland	Sweden	Belgium	Across all countries
Concerned	26%	48%	42%	21%	29%	33%
Neutral	29%	35%	36%	33%	35%	34%
Not concerned	45%	17%	22%	46%	37%	33%

Perception of food supplements

We asked the respondents for more details about their **perception of food supplements**. More than three quarters of buyers are confident in the safety and quality of food supplements (78%). We also observe that 72% of users generally find the ingredient information on supplement labels easy to understand and that 66% of users feel informed enough about the levels of vitamins and minerals per daily dose in food supplements.

Together, these findings indicate that food supplements are regularly consumed and highly valued across Europe. Consumers generally pay attention to the information about the levels of vitamins and minerals per daily dose and attach importance to recommendations from healthcare practitioners, though patterns vary between countries. In addition, confidence in terms of safety and labelling is generally high, facilitating trust about food supplements. These consumer insights complement the market trends outlined in Section 2, particularly regarding the importance of prevention, self-care, and informed choice.

4. Conclusion

This report provides an overview of the EEA food supplements market and consumer behaviour insights, focusing on food supplements containing vitamins and minerals. The participating companies represent approximately 65% of the EEA market, employ thousands of people, and place more than 2,500 food supplement products on the market through a multi-staged and diverse value chain. The sector expects a sales growth of approximately 5% over the next five years, driven by innovation, demographic trends, e-commerce expansion, and increasing consumer focus on self-care. Continued scientific validation and transparent communication is necessary, especially in terms of challenges related to price competition, rising costs, and consumer scepticism.

Food supplements are firmly established as a mainstream consumer healthcare product in Europe. More than half of contacted consumers purchase food supplements (55%). Nearly two-third of food supplement consumers use food supplements daily (62%) and the majority indicated that food supplements are important for them (82%). The surveyed consumers value supplements in terms of health and immunity support, and tend to trust their safety and labelling. Consumer decisions related to food supplements are generally shaped by healthcare recommendations and attentiveness to dosage information, though country-specific differences highlight the importance of tailored communication.

By presenting market evidence and consumer insights, this report highlights the key role of food supplements in supporting prevention and self-care in Europe.