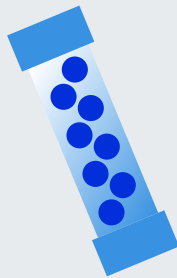


THE VALUE OF **FOOD** **SUPPLEMENTS** CONTAINING MINERALS AND VITAMINS FOR EUROPE



AESGP

VOICE OF EUROPEAN SELF-CARE INDUSTRY





This brochure is based on data and insights provided by the report *“Food Supplements in Europe: Market Overview & Consumer Behaviour Insights”*, conducted on behalf of AESGP by EPPA SA/NV. For more details and bibliographical references, please consult the main report.

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Executive Summary

Food supplements, especially those containing minerals and vitamins, are an essential part of modern health and wellness across Europe. They help support overall well-being, bridge nutritional gaps, support healthy ageing, and contribute to public health goals.

While the European market is robust and innovative, it faces challenges such as regulatory changes, market saturation, and evolving consumer expectations.

This brochure provides a comprehensive overview of the sector, including regulatory context, market size, consumer behaviour, and key trends, and offers recommendations for sustainable growth.

About this brochure and its contents

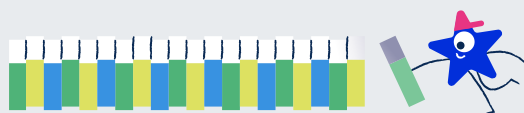
For the purposes of this research, “food supplements” refers exclusively to supplements containing minerals and vitamins. This clear focus forms the foundation for the analysis and conclusions presented throughout this brochure.

The brochure summarises the results of the AESGP-EPPA report examining food supplements containing vitamins and minerals across Europe, with a particular focus on both market dynamics and consumer behaviour. The report covers the entire European Economic Area (EEA)¹ and draws upon a combination of desk-based research, a questionnaire distributed to 11 manufacturers and distributors of food supplements, and a consumer behaviour survey involving 6.000 participants.

¹ – Comprising the European Union (EU-27), Iceland, Liechtenstein, and Norway.

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Introduction

Across Europe, food supplements are increasingly recognized as vital tools for supporting health, preventing disease, and promoting self-care. They play a crucial role in bridging nutritional gaps that persist despite advances in food quality and public health initiatives. As populations age and lifestyles change, the demand for effective, safe, and accessible supplements continues to grow. This brochure summarizes the importance of food supplements in European prevention and self-care, drawing on market data and consumer insights.

Regulatory Context

At European Union level, food supplements are regulated as foods and are generally subject to the provisions of European food law, including, but not limited to, food labelling, nutrition and health claims, food additives, food hygiene and production, and food control.

The Food Supplements Directive 2002/46/EC sets specific marketing requirements for food supplements relating notably to their composition and labelling/advertising. It regulates the vitamins and minerals, and the substances used as their sources, which can be used in the manufacturing of food supplements (in the Annexes to the Directive). The Directive also stipulates that maximum and minimum levels for the content of vitamins and minerals in food supplements shall be established.

Public Health Priority

Nutrition is a central focus for both European and global health agendas. Poor diets contribute to non-communicable diseases and malnutrition, prompting major EU initiatives such as EU4Health, Europe's Beating Cancer Plan, and EU Cardiovascular Health Plan. Despite these efforts, nutrient intake gaps remain widespread, highlighting the ongoing need for supplementation.

The Role of Food Supplements

Food supplements are intended to correct nutritional deficiencies, maintain an adequate intake of certain nutrients, and support specific physiological functions. By improving dietary quality, food supplements support the United Nations' Sustainable Development Goal "Zero Hunger", which aims to ensure adequate nutrition for every individual.

Understanding market dynamics and consumer perceptions is essential for evidence-based decision-making and responsible self-care practices.

Food Supplements Available on the EU Market

Food supplements are available in the EU in a wide range of formats, including tablets, (soft gel) capsules, gummies, syrups, and powders in small dosage units. This diversity not only reflects ongoing innovation within the sector but also caters to the varying preferences of consumers.

Products are tailored for adults, adolescents, and children, and often address specific life stages or health needs such as menopause, pregnancy, bone health, immunity, and energy management.

Key Vitamins and Minerals in Food Supplements

Certain vitamins and minerals are especially prominent in the sector. The following tables highlight the five most important² vitamins and minerals, along with the key sub-populations that benefit most from their inclusion:

The Most Important Vitamins

Vitamin	Key sub-populations
Vitamin C	Active individuals; those managing specific health concerns (e.g., ophthalmology, menstrual cycle, immune system support); elderly people; children
Vitamin D	Individuals managing concerns linked to ophthalmology, the immune system, or bone health; elderly people; pregnant women; children; active individuals
Vitamin B6	People seeking cardiovascular support
Vitamin B12	Vegans; vegetarians; active individuals
Folic acid	Pregnant women; children

2 – The report defines “importance” as the combined significance of vitamins and minerals for the participating companies, ranked from 1 (most important) to 5.

The Most Important Minerals

Mineral	Key sub-populations
Magnesium	Active individuals; elderly people; pregnant women; those managing concerns linked to cardiovascular, musculoskeletal, bone or mental health, the immune system, or sleep
Zinc	Active individuals; those managing concerns linked to cardiovascular health, ophthalmology, the immune system, or menstrual health needs; elderly people; children; vegans; vegetarians
Calcium	Active individuals; those seeking immune system or bone health support; elderly people; children
Iron	Pregnant women; vegans; vegetarians; active individuals; elderly people
Selenium	Active individuals; elderly people; those seeking eye health support; children; vegans; vegetarians



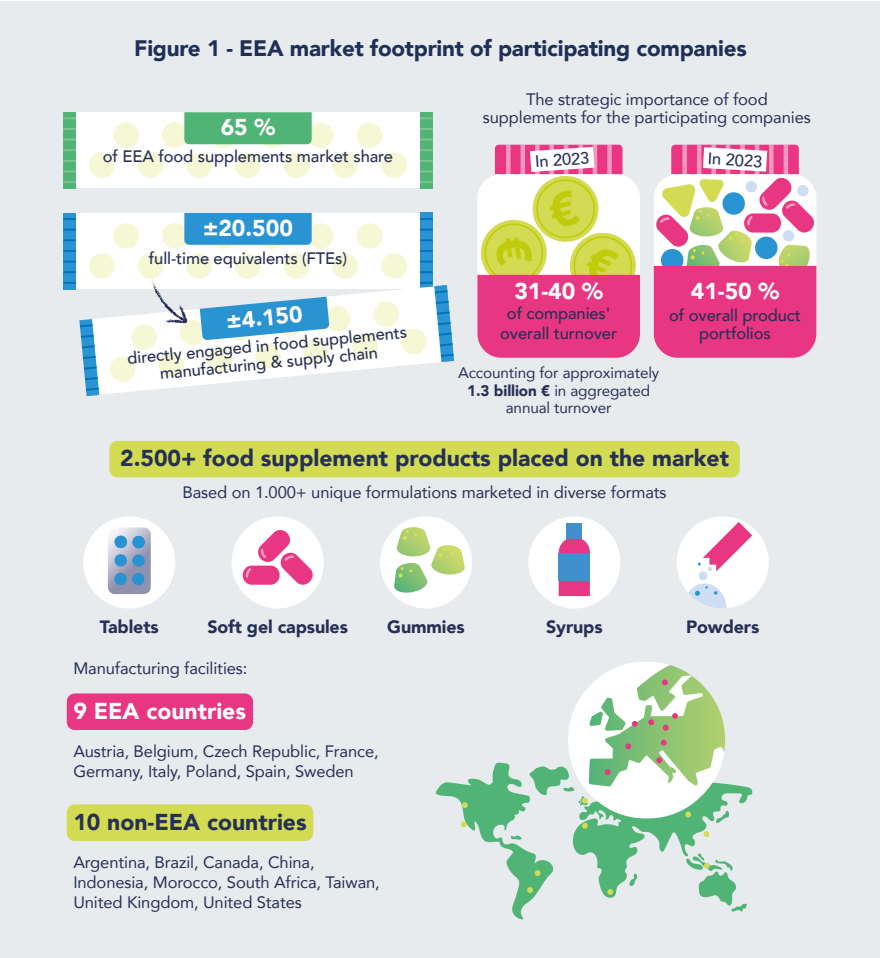
How are dosages of vitamins and minerals determined in food supplements placed on the market?

Dosage levels are set by companies based on scientific evidence, regulatory requirements, and the needs of specific consumer groups. This process aligns with EFSA Tolerable Upper Intake Levels, national guidelines, health claims legislation, and EU Nutrient Reference Values. Formulation decisions also consider bioavailability, safety, and consumer preferences, such as demand for vegan or clean-label products.

Market Dynamics

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”).

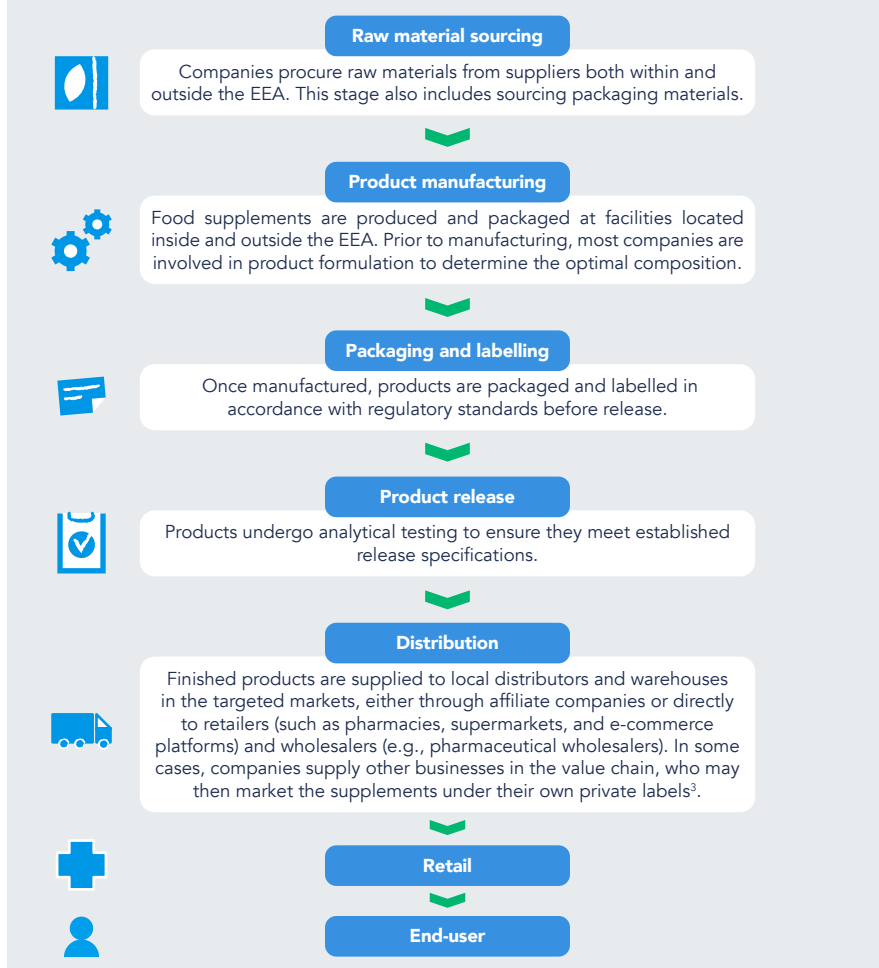
Market Footprint



Value Chain Overview

The food supplements value chain includes several key stages (see figure 2), managed directly by the companies involved or outsourced to third-party contractors.

Figure 2 - Typical value chain of a food supplement product



3 – It is estimated that food supplements produced by participating companies are distributed to over 71,000 downstream companies within the EEA, a conservative estimate, as some companies were unable to provide complete distribution data. This figure should be considered a minimum (lower bound). 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.

Market Trends: Drivers and Challenges

The food supplements market is experiencing significant changes, shaped by evolving consumer preferences, technological innovation, and demographic trends.

While the sector is poised for steady growth, with sales projected to rise by approximately 5 % over the next five years, it faces both promising opportunities and notable challenges.

Success in this dynamic landscape will depend on continual scientific validation and alignment with evolving regulatory standards.

Growth Drivers



Innovation and new product launches

The continuous development of new formulations and product forms, such as gummies, is attracting new consumers and addressing specific health requirements.

There is also a growing emphasis on personalised nutrition solutions that cater to the varying needs of the population.



Broader (geographical) distribution through e-commerce

The expansion of e-commerce enables manufacturers and retailers to reach consumers more directly. The COVID-19 pandemic accelerated this trend and helped to normalise online purchases of supplements.



Shifting consumer preferences towards sustainable diets

The rising popularity of vegetarian and vegan diets in Europe is driving demand for supplements designed to address potential micronutrient deficiencies.



Greater focus on self-care and health awareness

Consumers are increasingly incorporating food supplements into their daily self-care routines. Personalised products targeting areas such as immunity, digestive health, and cognitive function are particularly in demand.



Demographic changes

Europe's ageing population is a significant factor shaping the market, while younger consumers are also showing growing interest in wellness and preventative health, further fuelling demand.

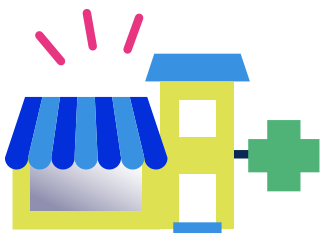


Scientific validation and evolving regulations



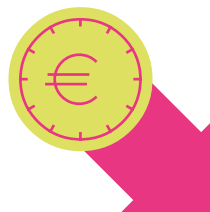
There is rising demand for products backed by credible scientific evidence and authorised health claims. Forthcoming EU regulations on micronutrient levels and labelling are also influencing product reformulation and innovation.

Key Challenges



Market saturation

The proliferation of new products and brands, coupled with the growth of e-commerce, has made the market highly competitive.



Intensifying price pressure

Increased competition is leading to downward pressure on prices within the food supplements sector.



Consumer scepticism

A lack of trust or the spread of misinformation among consumers may hinder the adoption of food supplements, highlighting the need for robust scientific substantiation and transparent communication.



Rising raw material and production costs

Disruptions in global supply chains, escalating transport expenses, and the higher cost of sustainably sourced ingredients are squeezing profit margins and could restrict product availability and affordability in certain markets.

Consumer Behaviour and Preferences

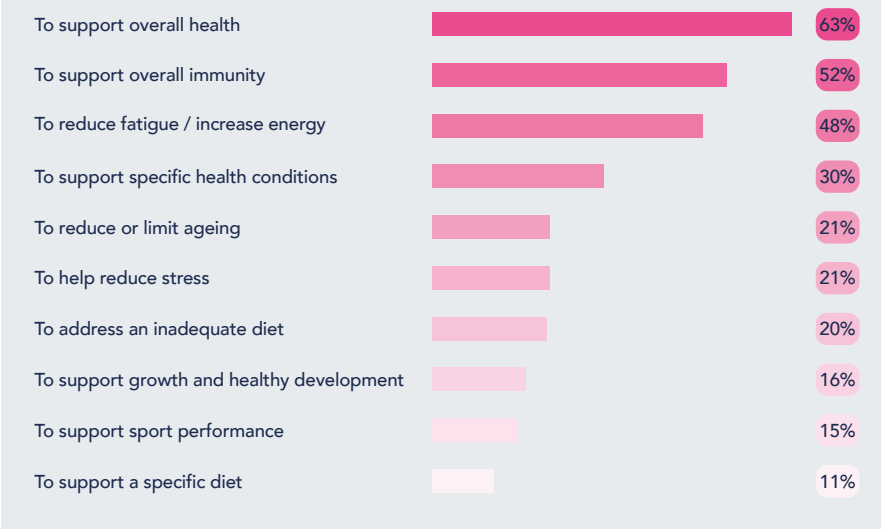
This section uses results from a public consumer survey on food supplements containing vitamins and minerals, based on responses from 6.000 participants (1.200 each from Belgium, Germany, Italy, Poland, and Sweden).

Reasons for Purchasing Food Supplements

Food supplements are widely used across Europe, with many people incorporating them into their daily self-care routines for various reasons. In terms of the perceived importance of food supplements, 82 % of users indicate that food supplements are important for them.

The most common motivations include supporting overall health, boosting immunity, reducing fatigue, increasing energy levels, and addressing specific health concerns (see figure 3), reflecting a broader emphasis on preventative health and personal wellness.

Figure 3 - The main reasons for consuming food supplements



Typical Use of Food Supplements

The length of time individuals use food supplements differs markedly: while some are new to supplementation, others have maintained the habit for several years, or even more than a decade.

Figure 4 - Consumption history

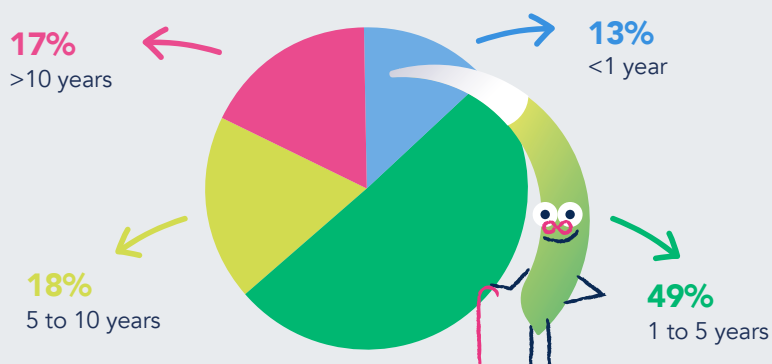


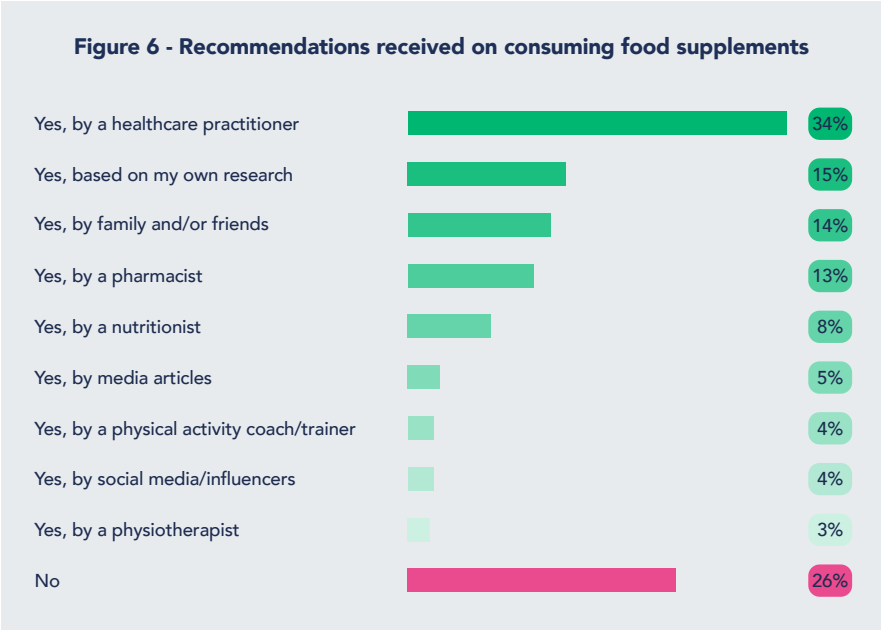
Figure 5 - Consumption frequency



Nearly two-thirds of users consume food supplements **daily**.

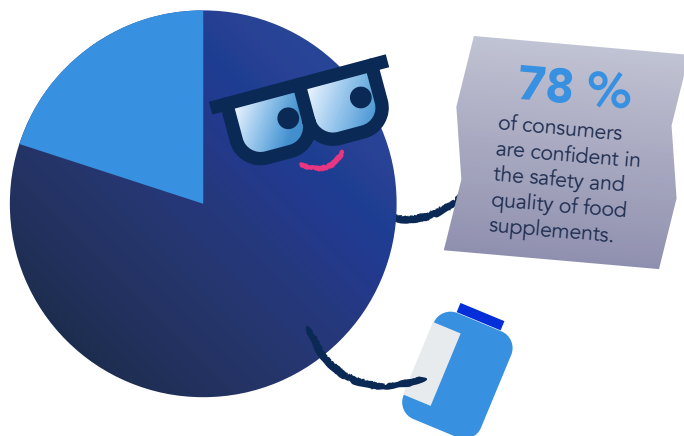
Recommendations on Food Supplements Consumption

Three-quarters of food supplement users have been advised to consume food supplements. 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). Marginally, family, friends, and pharmacists are also sources of recommendations, alongside users' own research (see figure 6).



Perception of Food Supplements

More than three-quarters of consumers are confident in the safety and quality of food supplements (78 %). 72 % of users generally find the ingredient information on supplement labels easy to understand, and 66 % of users feel informed enough about the levels of vitamins and minerals per daily dose in food supplements.



How do consumers perceive the levels of vitamins and minerals provided per daily dose?

Most consumers are attentive to the vitamin and mineral content per daily dose in supplements, with 70 % checking this information when making purchases. Recommendations from healthcare practitioners (33 %) and personal research (32 %) are the leading factors influencing their choices, with pharmacists also contributing to decision-making for 22 % of consumers. While a third of food supplement users have no concerns about the levels of vitamins and minerals per daily dose, attitudes vary significantly between countries, particularly around worries of consuming excessive amounts. For example, consumers in Italy and Poland are generally more worried about excessive intake, whereas those in Germany, Sweden, and Belgium tend to be less concerned.



Conclusion

Food supplements play a significant role in European public health, with strong consumer confidence and a dynamic, innovative market.

This brochure 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 (55 %) purchase food supplements. Nearly two-third of food supplement consumers (62 %) use food supplements daily and the majority (82 %) indicate that food supplements are important for them. 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 practitioners' recommendations and attentiveness to dosage information, though country-specific differences highlight the importance of tailored communication.

By presenting market evidence and consumer insights, this research highlights the key role of food supplements in supporting prevention and self-care in Europe. Collaboration among industry, regulators, and healthcare professionals will be key to the sector's future success.

Notes

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Scan the QR code and read the main report

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