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COMMISSION STAFF WORKING DOCUMENT

**CHARACTERISTICS AND PERSPECTIVES OF THE MARKET FOR FOOD
SUPPLEMENTS CONTAINING SUBSTANCES OTHER THAN VITAMINS AND
MINERALS**

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CHARACTERISTICS AND PERSPECTIVES OF THE MARKET FOR FOOD SUPPLEMENTS CONTAINING SUBSTANCES OTHER THAN VITAMINS AND MINERALS

1. CATEGORISATION AND CHARACTERISATION OF THE SUBSTANCES USED

The number of substances other than vitamins and minerals used in food supplements on the European market is estimated to be over 400.

For the sake of clarity and simplification, the most widespread substances have been grouped into six main categories that reflect the current market situation and that are regulated in a number of Member States.

Amino-acids

- L-Arginine
- Other essential amino acids
- Non-essential amino acids

Enzymes

- Lactase
- Papain

Prebiotics and probiotics

- Inulin
- Lactobacillus acidophilus
- Bifidobacterium species
- Yeast species

Essential fatty acids

- Gamma-linoleic acid
- Fish oils (DHA/EPA)
- Borage oil (*Borago officinalis*)
- Flaxseed oil (*Linum usitatissimum*)

Botanicals and botanical extracts

- Aloe (Aloe vera)
- Ginkgo (Ginkgo biloba)
- Ginseng (Panax ginseng)
- Garlic (Allium sativum)
- Green tea extract (Camellia sinensis)
- Garcinia extract (Garcinia Cambogia)
- Guarana extract (Paullinia cupana)

Other substances

- Lycopene
- Lutein
- Coenzyme Q10
- Taurine
- Carnitine
- Inositol
- Glucosamine
- Chitosan
- Spirulina
- Soy isoflavone

It should be noted that there could be overlapping between these categories. For example, certain plant oil extracts can be listed under the heading 'botanicals' as well as under 'essential fatty acids'.

2. MARKET DATA¹

- The total size of the EU food supplement market in 2005 was estimated to be around five billion euros (retail selling prices). This figure is divided between food supplement products containing vitamins and minerals that have a market

¹ Source: "The use of substances with nutritional or physiological effect other than vitamins and minerals in food supplements", European Advisory Services (EAS), 2007.

share of 50%, and supplements containing other substances with a market share of 43% equivalent to 2.15 billion euros. 75% of the latter value constitutes sales of these products in Germany, Italy, France and the United Kingdom.

- Between 1997 and 2005, the growth of the market for food supplements containing other substances ranged between 20% in the United Kingdom to 219% in Poland.
- Growth projections for this market for the period 2005-2010 indicate a slowdown in growth. Forecasts for this period vary between the Member States and range from 4% to 45%, with an average of 20% to 25%.

Further information can be found in the Annex.

3. OVERVIEW OF THE MARKET

Available data from 17 Member States indicate that the most commercially important substances are the following:

- Fish oils
- Probiotics
- Certain herbal ingredients

These three categories account for over 50% of the market.

It is important to note that a significant proportion of the market for some of the herbal products (notably Echinacea and Ginkgo) is made up of products registered as medicinal products in certain Member States.

Another issue to note is that significant national variations exist. For example, fish oils constitute over 50% of the market of other substances in Denmark, but under 3% in Spain and in Italy.

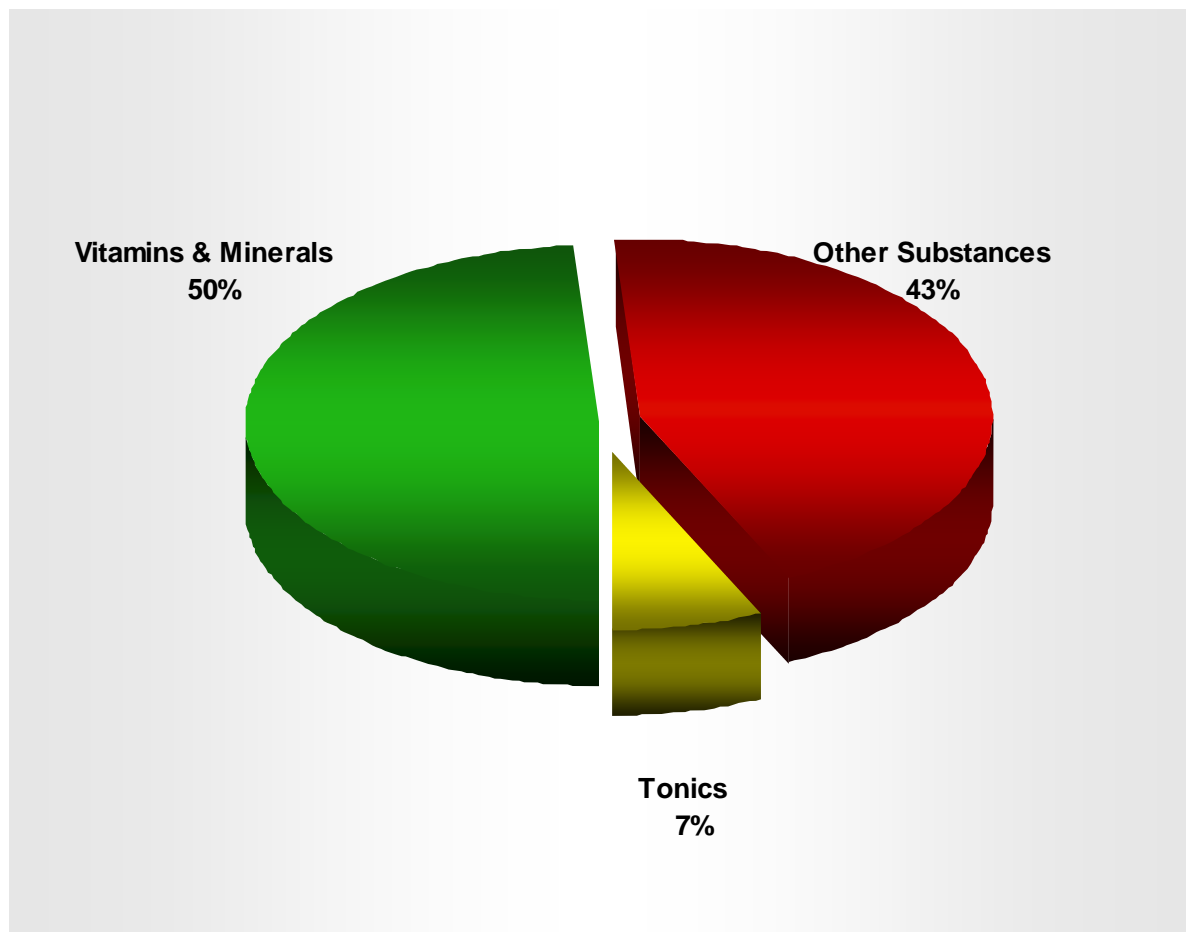
Probiotics account for 44% of the market in Italy and only 0.3% in Denmark.

Herbal products (ginkgo, ginseng, St John's Wort, echinacea and garlic) make up 75% of the market in the Netherlands, 40% in France, and under 5% in Italy.

Further information can be found in the Annex.

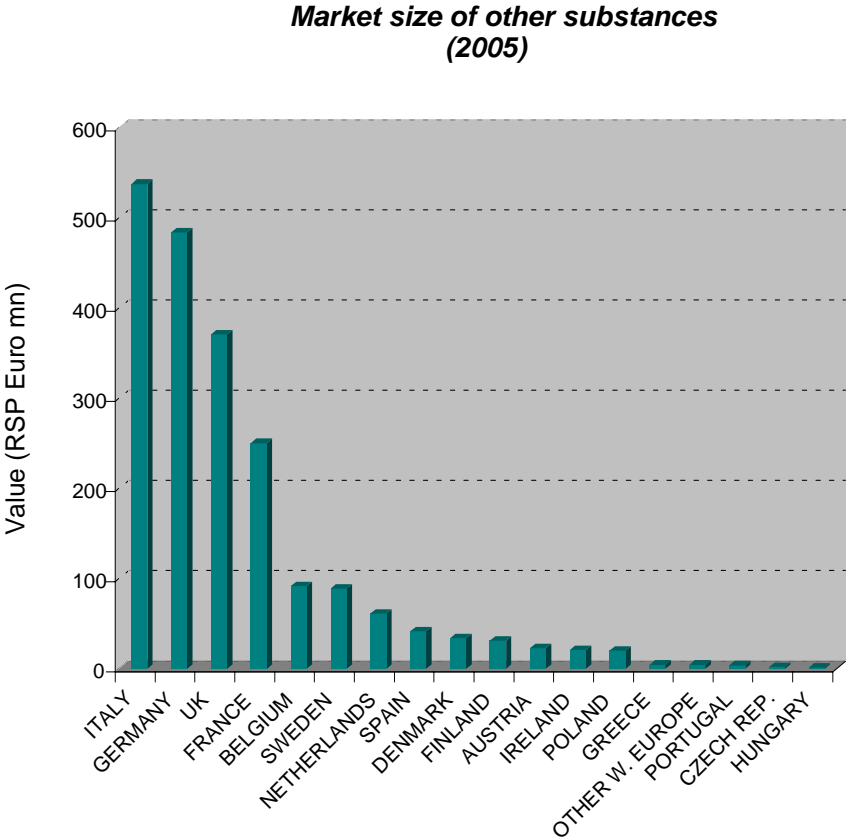
ANNEX

Graph 1: Relative market share of the food supplement segments in the EU



Source: Euromonitor 2005

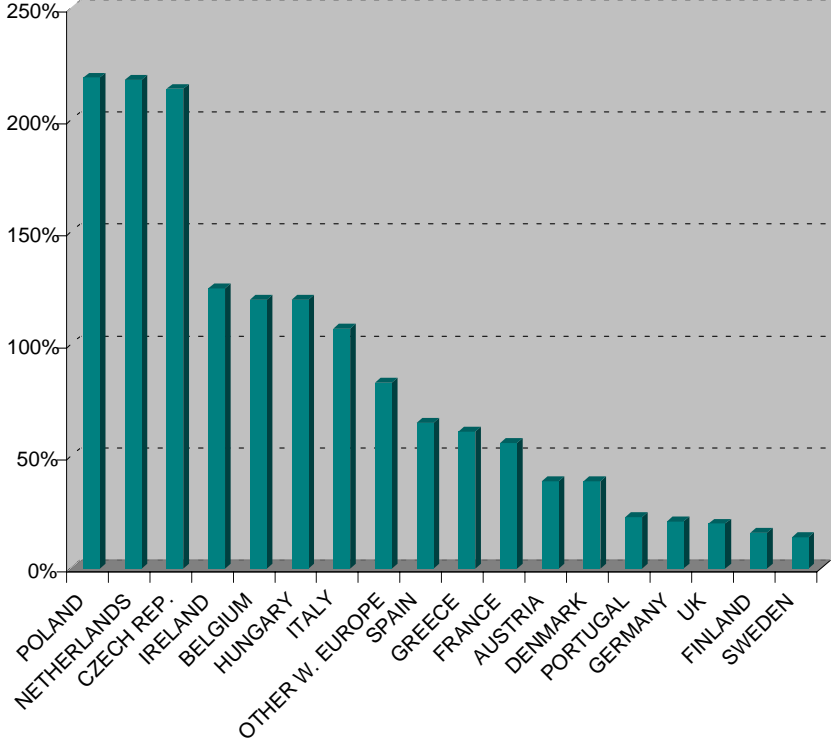
Graph 2: Current market size and total growth of other substances in the EU



Source: Euromonitor 2005

Graph 3: Future projected growth (2005-2010)

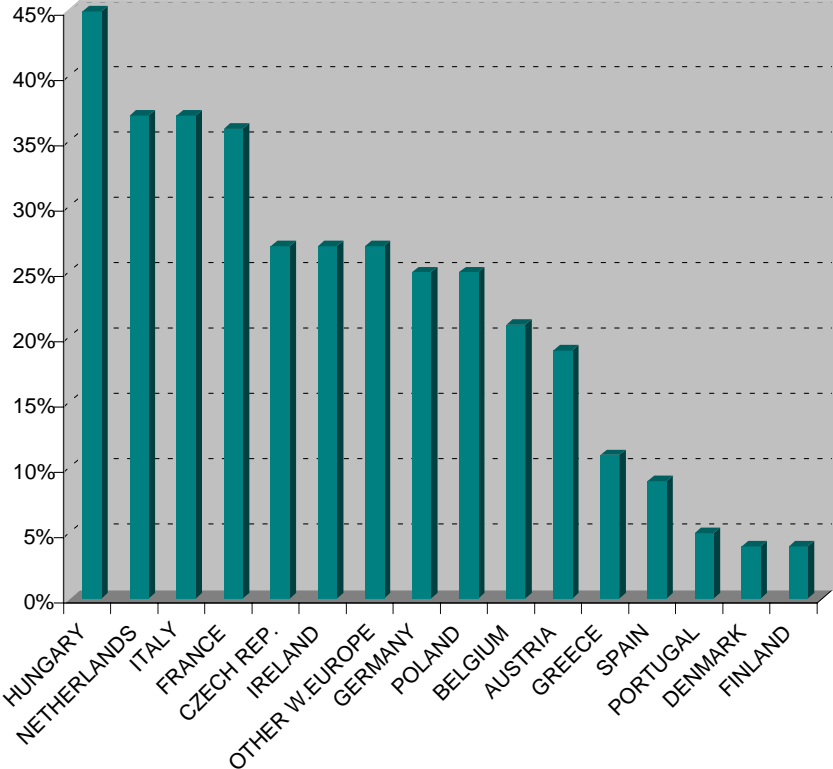
**Total growth of other substances
(1997-2005)**



Source: Euromonitor 2005

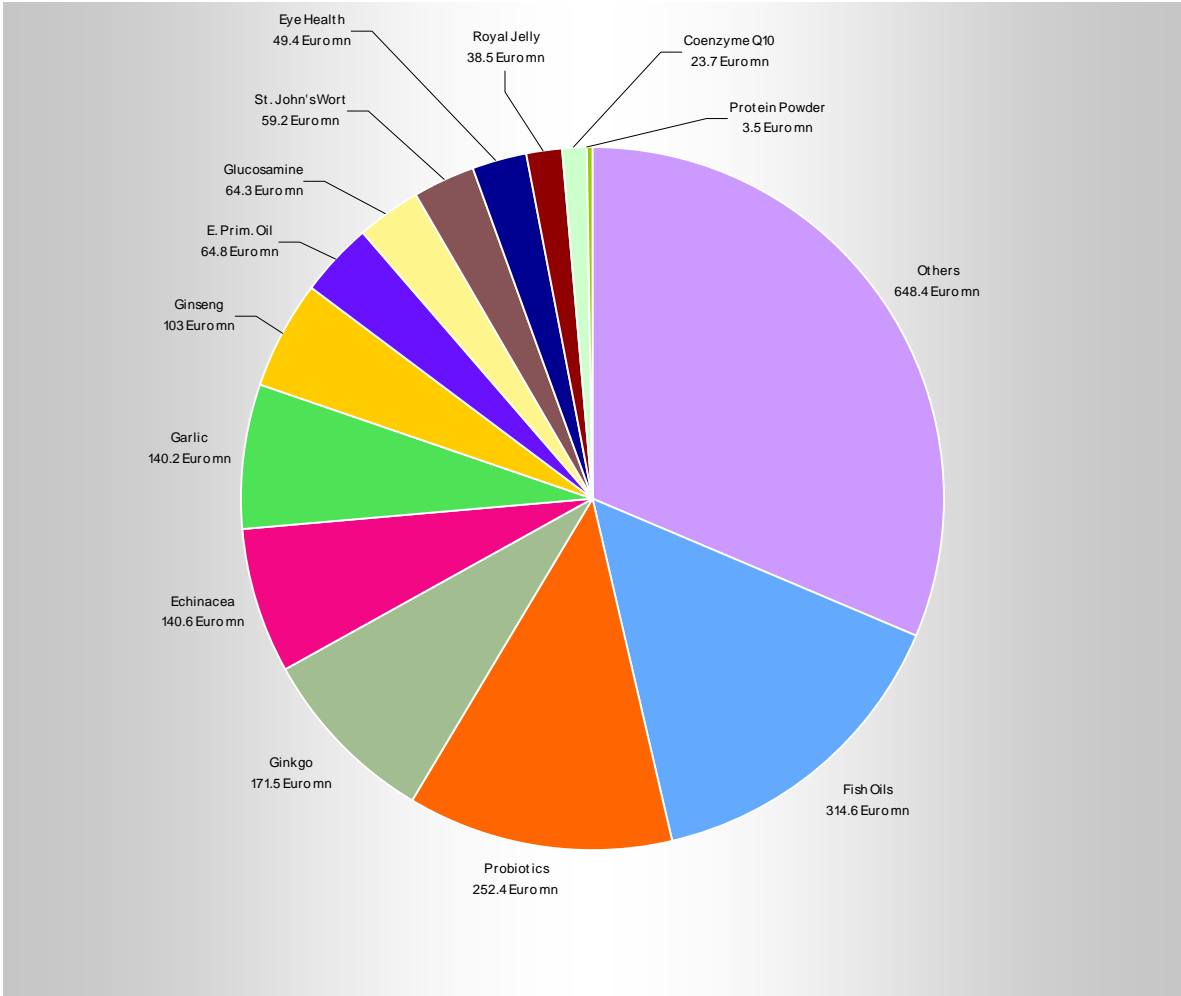
Graph 4: Market size of other substances across 17 EU countries

*Future growth forecast of other substances
(2005-2010)*



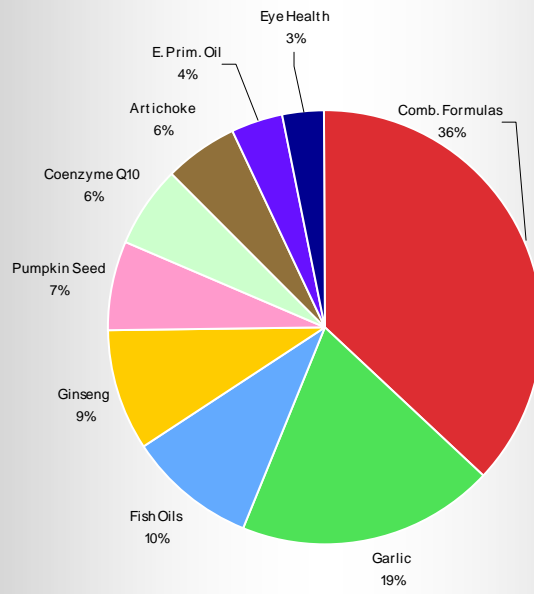
Source: Euromonitor 2005

Graph 5: National preferences: Market size of other substances

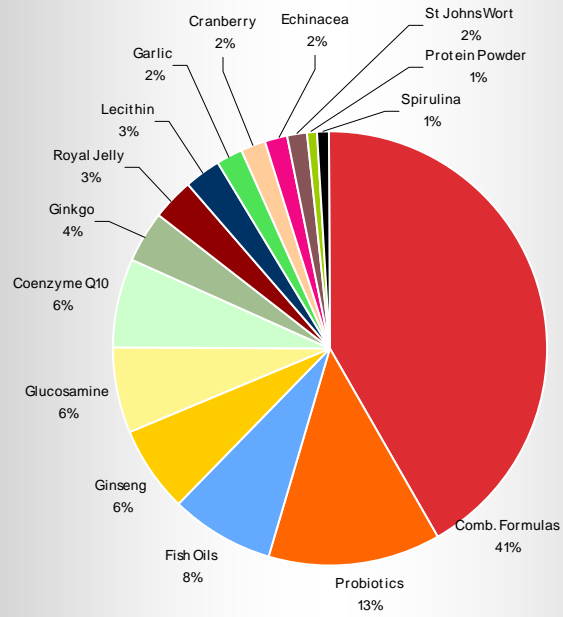


Source: Euromonitor 2005

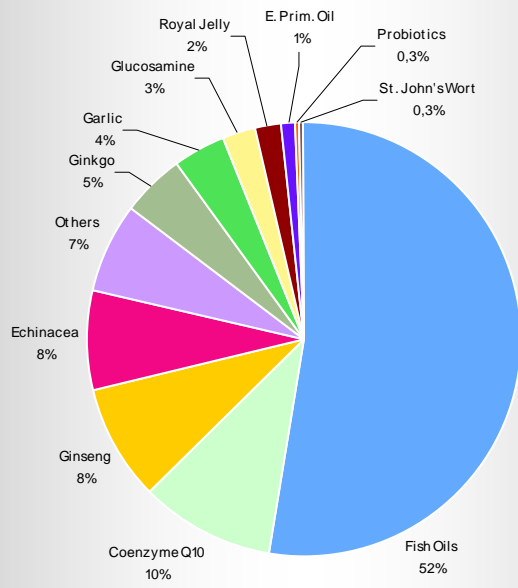
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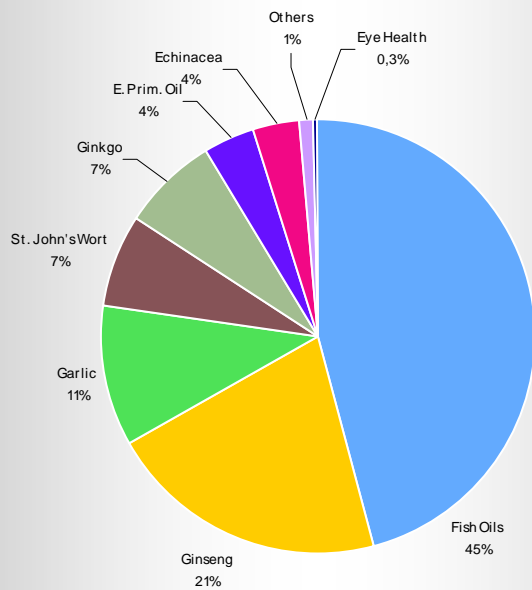
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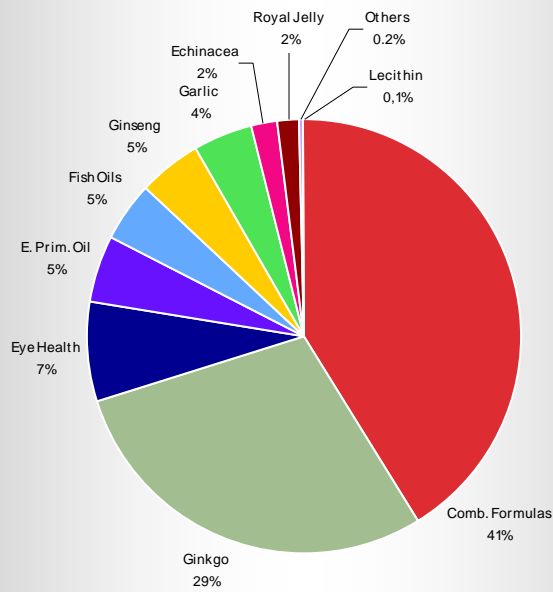
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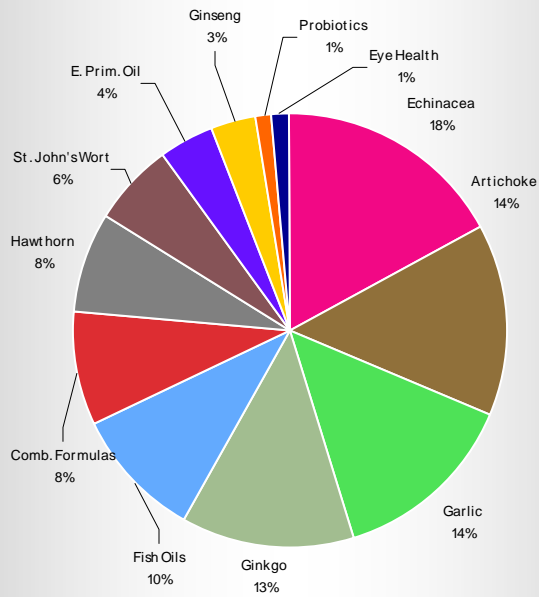
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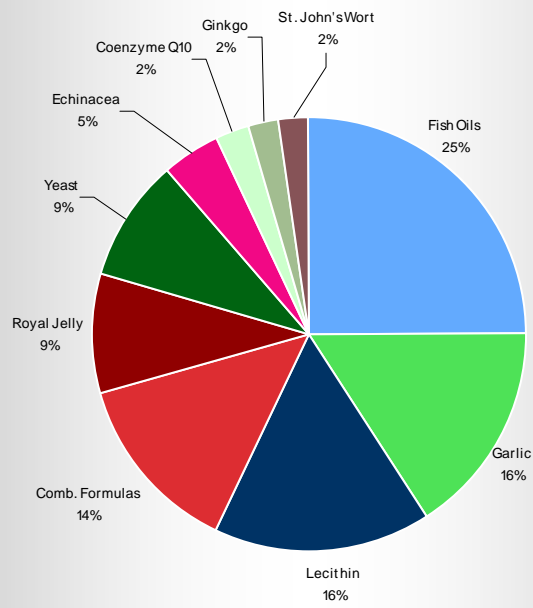
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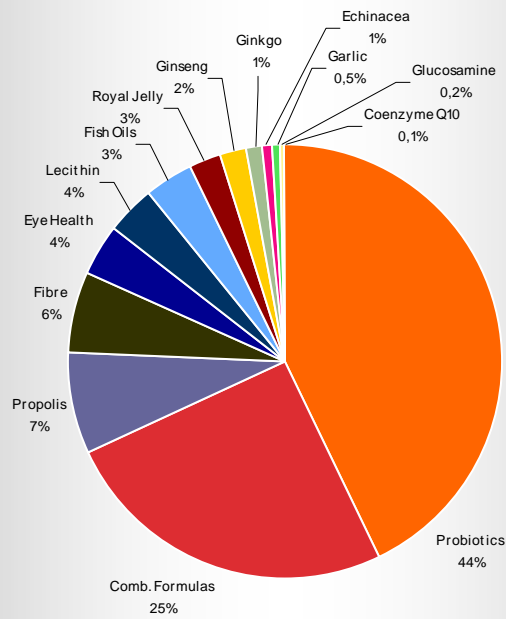
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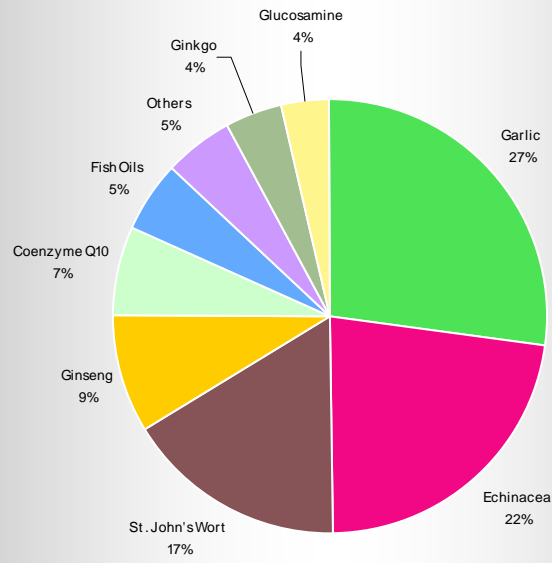
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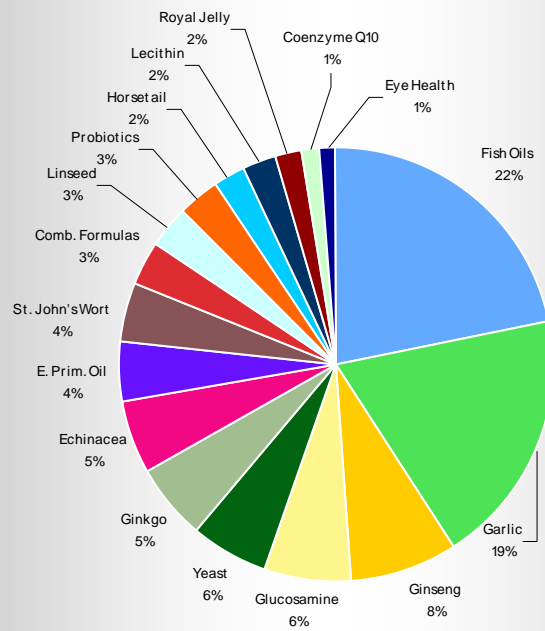
ITALY



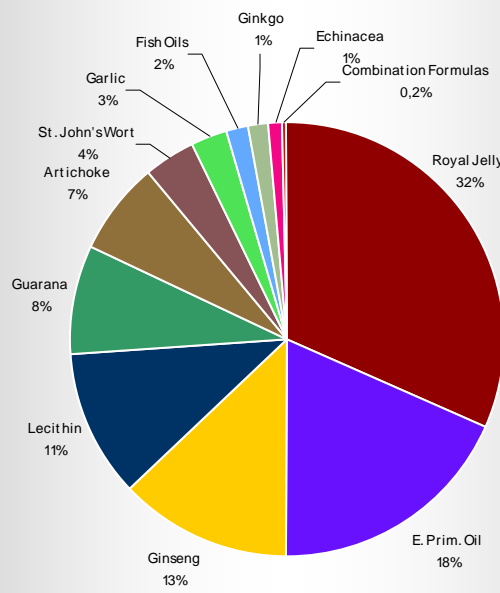
NETHERLANDS



POLAND



SPAIN



UK

