Europe Vitamin and Dietary Supplements Demand and Forecast
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In the European food and beverage industry, the pre-biotic market has been broadening its horizons. The developments are taking place with several changes in products such as infant formula, dairy and beverages.

In 2010, European dietary supplements market grew by only 5.70% but this growth was higher than the 2009 results when market grew by only 2.00%. From 2010-2015, market is expected to grow at a CAGR 5.07%, driven by developing European dietary supplements market, increased education level in both Western and Eastern regions, and also due to the growing demand for herbal supplements and fish oil.

**Figure: Europe Vitamin and Dietary Supplements Market by Retail Sales and Forecast (2006-2015F)**
VITAMIN AND PREBIOTIC

Globally, Europe is regarded as the largest market for vitamins and the US follows closely behind. Among the various supplement products, vitamin E represents the largest segment and during the analyzed period shift in demand was also seen for vitamin B complex. In 2006, the European vitamin B market was valued at USD 562.47 million and in 2010 it had grown to USD 779.60 million.

Figure: Europe Vitamin B Market (2006-2010)
The European pre-biotics market is rapidly developing led by growing demand for dairy products and beverages. In addition, pre-biotic ingredients manufacturers are developing specialization into meat and snack products.

**Figure: Europe Pre-biotic Supplements Market by Retail Sales (2006-2010)**

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**HERBAL SUPPLEMENTS**

Globally, the largest markets for herbal medicines are Germany, China, Japan, the US, France, Italy, the UK and Spain. In Europe, herbal supplements market by retail sales reached USD 7.10 billion in 2010. Among the various European economies, Germany was the largest market, with 31% share, followed by France (22%), Italy (17%) and the UK (8%).

In Europe, during the economic slowdown, huge capital was required for registration under EU regulation of companies. This created problem for small companies, thereby, providing opportunities for acquisitions in herbal supplements’ market.

**Figure: Europe Herbal Supplements Market by Retail Sales (2006-2010)**

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SPORTS NUTRITION

Increasing interest in maintaining fitness and interest in sports have helped Europe become a growing market for sports nutrition products. In the coming years, the European sports nutrition market is expected to offer promising growth potential to manufacturers of sports-product ingredients.

In 2010, Germany, Italy and the UK accounted for around 54% of the total market. Germany was the market leader, with USD ~ million of sports nutrition expenditure, and this is forecasted to increase to USD ~ million by 2013. The sports nutrition market in the Europe region grew with a CAGR 8.41% from 2006-2010, driven by rising demand in many countries, especially UK, Germany & Italy.

Figure: Europe Sports Nutrition Supplements Market by Retail Sales (2006-2010)

UK NUTRITION AND DIETARY SUPPLEMENTS INDUSTRY

The UK is a growing market for vitamin and dietary supplements but witnessed a low demand in some of the categories such as single vitamin, eye care and memory health supplements in 2009. While on the other hand joint and heart health supplements continued to grow and helped market register a positive performance throughout 2009 albeit at a slow growth rate.
The vitamin and dietary supplements market is expected to reach USD ~ million by 2015 with a CAGR of 4.85%. This growth will be driven by many industry and economy factors. Industry factors such as vitamin demand, growing market for sports supplements, rising heart cases and use of supplements (vitamin A, C & E) in beauty care products.

VITAMIN

In 2010, the UK single vitamins and supplements market sale was estimated to be worth USD ~ million, up 5.79% when compared to 2009. However, the segment has not achieved the growth rates enjoyed by other markets with a health profile such as functional foods and beauty aids.

**Figure 1: UK Vitamin Demand by Segments in 2010**

*Source: AM Mindpower Solutions*
Among the various vitamin supplements in the UK, vitamin C is the most popular single vitamin supplement, other supplements that people generally prefer consuming; particularly during an attack of cold include zinc and Echinacea.

Demand for vitamin B has also been growing in the country, however, the growth during 2008 & 2009 was found to be slow with the impact of global slowdown, during which people in order to better manage their financial budget, preferred to take multivitamins rather than spending on single vitamins.
Multivitamins continues to be the most popular vitamins consumed both regularly and occasionally, the reason being that in this product category there are different formulations targeting different segments of the population.

**Figure: UK Multivitamin Market Retail Sales (2006-2010)**

**HERBAL SUPPLEMENTS**

During 2010, in the overall European market, UK’s share was around 9% in the herbal supplements category. Sales of herbal remedies showed a slight rise by 1.80% in 2009 and 2.18% in 2010 from USD ~ million in 2006 to USD ~ million in 2010.
SPORTS NUTRITION

In the UK, the retail sales value of sports nutrition products increased by 14% in 2010 to reach USD ~ million. Among the various sales distribution categories, health food shops and pharmacies were the most popular sales outlets with internet generating 6% of sales. Among the various supplements, protein powder was one of the most popular, as it was used generally as a muscle building supplement. In the protein supplement category, whey protein which is a by-product of cheese-making was in demand, as it was sold in the market as a product containing high levels of essential amino acids, the compounds that form protein.

ROMANIA NUTRITIONAL AND DIETARY SUPPLEMENTS INDUSTRY

The dietary supplements market in Romania, which showed a 9.00% growth rate in 2008, registered a slowdown in 2009. Soon in 2010, due to positive economy growth, rise in per capita income and low level of market saturation increased the growth rate from 3.30% in 2009 to 5.00% in 2010, considering the main distribution channels, including pharmacies and health shops.

In 2009, the dietary supplement market growth slowed significantly. The reason was the economic difficulties which the country experienced after the financial meltdown, which also led to decreased consumer spending.
GERMANY

Functional food, probiotic, vitamin and mineral drinks help to improve health and these products have high demand in Germany. A major proportion of educated population is health conscious which has developed market for nutritional and dietary supplements and further expected to continue to grow.

Figure: Healthcare Products Demand by Sectors in Germany in 2010
SPORTS NUTRITION

A large portion of sports nutrition supplements comes from fitness centers and sports clubs. Also health awareness and increase in working population further supporting demand for sports nutrition products to stay healthy.

Gyms play a key role in growing demand for dietary products such as protein shakes and powder, weight gain and loss products, muscle building supplements, etc.

Figure: German Sports Nutrition Supplements Market (2006-2010)
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