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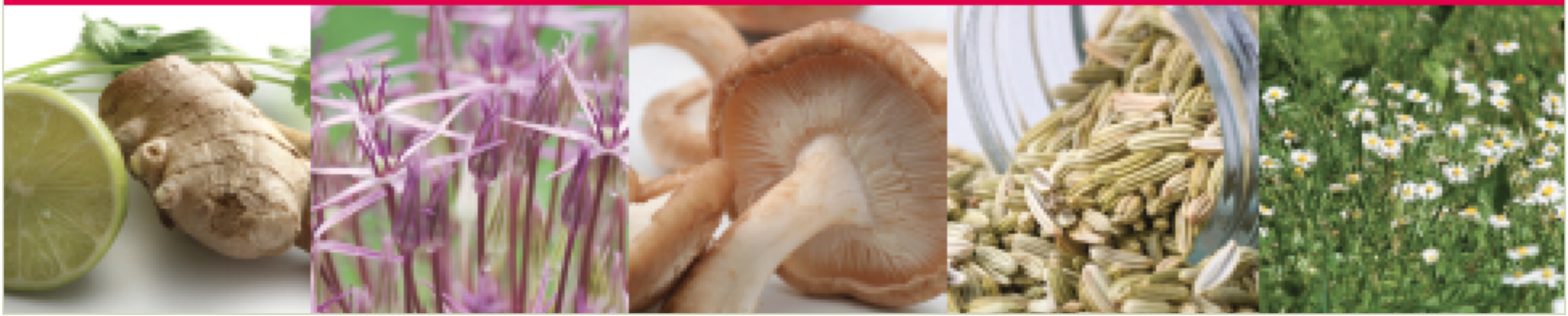
Botanical Food Supplements in the EU

July 2012



Size of the Botanical Food Supplements Market

- EU botanical food supplements market value: **2.1 Billion €** — Data compiled by EHPM EBF 2012
  - In retail stores:
    - Market of botanical food supplements is valued at 1.6 Billion €
  - Non store channels: — The European Direct Selling Association
    - Direct sales amounts to 420 Million €
    - Internet sales estimated at 125 Million €

- Number of botanical food supplements notified — National Authorities
  - BE: 3,000 per year
  - IT: 20,000 notified products (4,500 per year)
  - FR: 25,000 since notification was initiated in 2006

- THMP market is considerably smaller — EMA report 2011
  - About 750 applications granted EU wide (including member state duplicates)
  - 73% of THMP applications submitted in only 6 countries

Botanicals in Food Supplements

- Wide variety of botanicals used

  e.g. positive lists of botanicals allowed
  - BE: positive list of ~650 botanicals
  - IT: positive list of >1,200 botanicals

- Most used botanicals in food supplements marketed in the EU
  - *Aesculus hippocastanum*
  - *Allium sativum*
  - *Aloe Vera*
  - *Camellia sinensis*
  - *Cynara scolymus*
  - *Echinacea purpurea*
  - *Ginkgo biloba*
  - *Harpagophytum procumbens*
  - *Hypericum perforatum*
  - *Panax ginseng*
  - *Passiflora incarnata*
  - *Rhodiola rosea*
  - *Serenoa repens*
  - *Silybum marianum*
  - *Vaccinium macrocarpon*
  - *Valeriana officinalis*

EHPM survey 2011

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The Sector of Botanical Food Supplements in the EU
(Excluding retail level)

EUROPAM 2005

- Cultivation and harvesting
  - Over 100,000 hectares cultivated
  - Employment: > 21,000 growers/collectors

*Data compiled by EHPM EBF 2012

- Extract manufacturers*
  - 100 - 150 companies
  - Employment: 10,000 - 15,000 people
- Final product manufacturers*
  - 1,000 - 1,500 mainly manufacturing botanical food supplements
  - Of which > 95 % SME's
  - Employment: 30,000 - 35,000 people
- Distributors*
  - 10,000 - 15,000
  - Employment: 75,000 - 100,000 people

Figures likely to be underestimated because of combination products

Distribution Channels in the EU

Botanical Food Supplements – Store Retailing			
	Store Retailing	Employment	Botanical Supplement Sales *Estimated %*
Food and Health Shops/Herbalists Data compiled by EHPM EBF 2012	> 50,000	50,000 – 100,000	5-10 %
Grocery/Supermarket/Retail Eurostat 2011	>460,000	5,000,000	10-30 %
Pharmacies Data compiled by EHPM EBF 2012	> 120,000	120,000 – 180,000	50-60 %

Botanical Food Supplements – Non Store Channels			
	Non Store Channels	Employment	Botanical Supplement Sales *Estimated %*
Direct Sales The European Direct Selling Association	850,000 - 900,000 independent sellers	3,500	20 %
Internet Sales Nutraingredients 2012	n.a	n.a	5-10 %

Botanical Food Supplements: Market Characteristics

Identification of companies:

- About 20% of companies only deal in botanical food supplements.
- Most food supplement manufacturers have at least some products containing botanicals.
- The majority of companies dealing with botanical food supplements are SMEs.

Data Gathering

Gathering market information for the botanical food supplement market is difficult:

- Differences in product classification among Member States, including combination products with vitamins, minerals and other substances.
- Information collected only in some distribution channels (retail, pharmacy, direct sales) and not in others.
- Differences in national market structure.
- Information gathering often fragmented and not focused on food supplements (e.g. foods and herbal teas included).
- Collected market data is classified in health segments, not based on product composition.
- Difficult to classify products on the basis of their composition.