



Your blueprint to nutraceutical success in Europe:

Key insights for market advantage



“If you’re playing in the European nutraceutical market, you’re in the right place.

Europe isn’t just keeping pace with global innovation, it’s leading the charge – outpacing North America and Asia Pacific in new product launches.¹ And with the market projected to soar from USD \$83 billion in 2025 to USD \$111.83 billion by 2030,² it’s only getting stronger, making it one of the most lucrative in the industry.



51% OF CONSUMERS IN EUROPE ARE PROACTIVE IN THEIR HEALTHCARE¹

This growth isn’t happening by chance. European consumers are proactive when it comes to their health in response to rising lifestyle-related diseases, creating considerable demand for functional foods, beverages, and supplements. Like most regions worldwide, the population in Europe is ageing too, with 21.3% of citizens currently over the age of 65 (and life expectancy rising).³ Given this, the appetite for healthy ageing, immunity, and cognitive health products is only set to rise.

This offers unique opportunities for nutraceutical brands – near and far – to capture market share in Europe’s thriving wellness economy and leave a lasting mark on the broader nutraceutical landscape.”

47% OF EUROPEAN CONSUMERS TAKE SUPPLEMENTS¹

Note from editor

Francesca Berry, Head of Content Programming, Informa Markets

Interested in seizing the wellness momentum in Europe? In this report, we highlight trends, top tips, and tactical takeaways to help brands navigate and succeed in this thriving market.

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Key opportunities in France, Germany, the UK, Italy, and Spain

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Insights powered by
Innova Market Insights

This report is backed by industry-leading data and analysis from Innova Market Insights, Vitafoods Europe's official Knowledge Partner.



Tracking trends across Europe

As the wellness revolution unfolds across Europe, brands are stepping up with smarter, more holistic nutraceuticals tailored to evolving lifestyles. From CBD-infused formulas for relaxation to mushroom-based formulas packed with functional benefits, the shelves are packed with innovative creations. But what are some of the mega-trends fuelling Europe's dynamic nutraceuticals market?

A snapshot of the European consumer



EXERCISE IS THE #1 TOOL FOR PHYSICAL HEALTH, FOLLOWED BY SLEEP AND NUTRITION



YOUNGER GENERATIONS USE TECHNOLOGY TO SUPPORT THEIR WELLNESS



TWO IN FIVE PREFER SUPPLEMENTS IN CAPSULE FORMAT¹

THE TOP THREE WELLNESS GOALS ARE:



MENTAL AND EMOTIONAL WELLNESS



WEIGHT LOSS



VITALITY AND ENERGY



Healthy ageing



Ageing well is a key motivator for healthy living across Europe, especially with the growing population of older adults. In the food and beverages space, “immune health” and “digestive/gut health” are the top claims related to healthy ageing, whereas leading supplements in this category tend to offer immune, brain-mood, or skin health benefits. However, growth is strongest in products offering multiple health benefits. Ingredients like collagen, botanicals, turmeric, functional mushrooms, ashwagandha, liquorice, and flaxseed are at the forefront of innovation.

Sustainable solutions



Planetary health is top of mind for European consumers when asked about global issues. Fifty percent say buying sustainable food and beverages makes them feel good about themselves and the environment, while minimising waste, recycling, and shopping local are among the most common sustainability efforts. Upcycled ingredients also appeal to up to two-fifths of shoppers in this region. Beyond their own habits, consumers in Europe also expect brands to take responsibility, calling for companies to prioritise sustainable packaging, protect nature, and reduce their carbon footprint.

Digital revolution



Digital tools may not yet be the go-to for all European consumers, but usage is increasing – particularly among generation Z and millennial consumers. Nearly one in four Europeans use digital health resources like nutrition apps and supermarket scanning apps to make more informed decisions, whereas more than one in five look to social media for healthy eating hacks. Nevertheless, friends, family, and recipe books remain the top sources of food inspiration, reflecting Europe’s deep-rooted culinary heritage. This blend of old and new presents a unique opportunity for brands to bridge the gap – integrating digital tools in a way that enhances, rather than replaces, traditional experiences.

Personalised platforms



The era of one-size-fits-all is fading fast. European consumers crave personalised solutions tailored to their unique needs, lifestyles, and genetics – and this rings true for nutraceuticals, too. And thanks to advancements in AI, big data, and wearable technology, personalised nutrition is no longer a pipe dream. Retailers like Holland & Barrett – a British-based company with locations across Europe – are already leading the charge, using in-store blood testing to guide personalised supplement recommendations – proving that innovation isn’t just about new products but also new ways to engage consumers.

Promising country-by-country opportunities

The European nutraceuticals market is dynamic and diverse, each country within this region bringing its own unique trends and consumer health priorities. This creates a complex, yet opportunity-rich, environment for brands. So, what are the top innovation hotspots within key countries?

France: The face of sustainable beauty

A new era in beauty is emerging – one that celebrates self-acceptance and inner beauty, rather than reversing time with traditional anti-ageing solutions. In France, this philosophy is already a way of life.⁴

“The French embody this evolving beauty standard, known for embracing ageing and vitality at every stage of life while prioritising natural skincare and “inside-out” products,” says Francesca. “Alongside the broader shift in how beauty is perceived, sustainability plays a growing role in purchasing decisions within this nation. To cater to this, the organic and natural cosmetics market in France is expanding.⁵ However, price sensitivity and greenwashing concerns remain key barriers to wider consumer adoption – so something to consider if brands want to innovate in this space.”

TOP THREE HEALTH GOALS IN FRANCE:



MENTAL AND
EMOTIONAL
WELLNESS



WEIGHT
LOSS



VITALITY
AND
ENERGY

Germany: Immunity stronger than ever

Germany has emerged as a key player in the immune health supplements category, accounting for 4.1% of the total global market in 2023.⁶ Although the UK is expected to lead Europe in revenue by 2030, Germany is the region's fastest-growing market.⁶ And that's no surprise, since "prevent diseases" is the #2 health goal for this population.

Francesca says, "Consumers in this country show a strong preference for vitamin D, vitamin C, and multivitamins, highlighting a clear opportunity for brands to develop formulations that feature (or combine) these ingredients.⁷ Additionally, there is a shift in how immunity is perceived – it is increasingly viewed as a pillar of overall wellness rather than just a shield against illness. Brands that educate consumers on the wider benefits of immune health will have a competitive edge here."

"But Germans aren't just focused on immunity," she adds. "They are also prioritising mental wellbeing and "all-in-one" holistic health solutions. Nutraceutical developers could respond to this demand by creating powerful supplements that address multiple aspects of mental wellbeing – for example, harnessing the benefits of ashwagandha and other adaptogens for stress; compounds like L-theanine, GABA, and St John's wort for mood support; and melatonin, valerian, or magnesium for sleep enhancement."

Beyond immunity and mental wellbeing, sports nutrition is another growing area in this region, with one in five German consumers increasing their intake of performance and recovery nutrition products due to the growing variety of novel and appealing products in this category.⁸ Brands can take advantage of this by diversifying their offerings – introducing innovative sports snacks like energy bars, nut butters, hydration tablets, and even functional puddings, for instance, or appealing to the more health-conscious consumer with low-/no-/reduced-sugar options.

65% OF GERMANS AGREE THAT VITAMIN C HELPS SUPPORT THE IMMUNE SYSTEM⁷

27% ARE INFLUENCED BY LOW-/NO-/REDUCED-SUGAR CLAIMS IN SPORTS AND FUNCTIONAL NUTRITION⁸

30% CONSIDER PROTEIN AN IMPORTANT INGREDIENT⁸

TOP THREE HEALTH GOALS IN GERMANY:



MENTAL AND
EMOTIONAL
WELLNESS



PREVENT
DISEASES



WEIGHT
LOSS

UK: Win hearts (and minds)

The UK is at the cutting edge of supplement innovation, accounting for 16% of European supplement launches over the past five years.¹ As in most other regions, mental wellbeing and cognitive performance are a big priority for UK consumers, with growing interest in supplements that help manage stress, improve sleep, and enhance cognitive function.

"We're seeing a surge in demand for cognitive health supplements that support mental and emotional wellbeing, boost mental clarity, and beyond. Ingredients like omega-3s and choline, nootropic botanicals like gingko, and adaptogens like ashwagandha, rhodiola, and functional mushrooms are really taking centre-stage here," explains Francesca. "These compounds are gaining recognition for their ability to sharpen focus, ease stress, and promote emotional balance in the fast-paced, "always-on" world we live in. My top tip for brands is to effectively communicate the tangible benefits of cognitive formulations, helping to educate consumers about the wonderful advantages these solutions can unlock."

Beyond brain-boosting supplements, weight management remains a key concern in the UK, with 28% of shoppers in this region saying they have altered their diets to try to lose weight. In addition, the UK continues to lead in European sports nutrition launches. There's a particular preference for performance-enhancing herbal components – think guarana, green tea, and ginger, which are gaining popularity for their energy, muscle recovery, and overall wellbeing benefits.

Going for gold in sports nutrition

In 2024, Europe ranked third globally in the sales value share of the sports nutrition category. Here are five things to know about sports nutrition innovation in this region:

1. Sports powders lead, but there is growing demand for hydration-focused options
2. The UK leads the market in Europe
3. High-protein claims are driving market growth
4. "Energy", "vegan", "no sugar", and "indulgent and premium" claims are also important
5. Milk chocolate is the #1 flavour, but mango and peach are gaining prominence



Italy: The heart of Europe's supplement usage

In Italy, supplements aren't just a trend, they're a trusted tool to support everyday health. Italians have a deep-rooted appreciation for health and wellness – and this extends beyond its famed Mediterranean diet. Italians are among Europe's most dedicated food supplement consumers, spending more per capita than any other country (averaging €63.6 per person in 2020).⁹

Francesca says, “*The main reasons for food supplement usage in Italy are to support immune health, boost energy, and aid bone and joint health.¹⁰ Twenty-two percent of individuals also take supplements to enrich a vegan or vegetarian diet.¹⁰ Probiotics are set for the fastest growth, due to their evolving role beyond gut health, to support immunity and even mental wellbeing, too. An important note for brands is that nearly half of Italians consult doctors before purchasing supplements and over a third seek advice from pharmacists.¹¹ This highlights the strong influence of healthcare professionals in decision-making and means that gaining the trust of medical experts could be key to penetrating this market.*”

80% OF ITALIANS CONSUME DIETARY AND NUTRITIONAL SUPPLEMENTS¹¹

Spain: Where heritage meets innovation

Spanish consumers are highly health conscious and deeply passionate about food, valuing both healthy choices and the joy of indulgence – and success lies in striking the right balance between health, taste, and tradition.

Francesca says, “*My top tips for winning over Spanish consumers are:*

- 1. Prioritise “low and light” claims.** *Health-conscious Spanish consumers still favour fat and sugar reduction over broader nutrition messages, so keep these claims front and centre, even in wellness-focused products.*
- 2. Never compromise on taste.** *While health matters to Spanish consumers, taste is the real deal-breaker. Make sure that reduced-fat or sugar products still deliver on flavour and indulgence.*
- 3. Balance tradition with innovation.** *Spanish shoppers appreciate familiar and authentic flavours and modern convenience. Why not reinvent classic Spanish favourites in formats that fit today's fast-paced lifestyles?”*

TOP THREE HEALTH GOALS IN SPAIN:



MENTAL AND
EMOTIONAL
WELLBEING



VITALITY
AND
ENERGY



PREVENT
DISEASES

A closer look: Unpacking Spain's growing role in the global nutraceuticals industry

Spain is already one of the top five countries influencing the European nutraceuticals market.¹² But in recent years, it has emerged as a leading hub for nutraceutical innovation. With rich biodiversity, the country offers a variety of locally sourced and high-quality natural ingredients for nutraceutical use. Complemented by its investment in cutting-edge research, Spain has positioned itself as a focal point for both local and international brands.

Spain's nutraceutical ecosystem offers vast potential for companies seeking to enter the European market – or indeed, make an impact in the wider global landscape.



Strong foundations for nutraceutical development

- Access to Mediterranean superfoods
- Vast marine resources
- Array of herbal and botanical extracts



Scientific excellence

- Thriving scientific community and innovative spirit
- Strong collaboration between universities, biotech companies, and R&D centres
- Key test market for new nutraceutical product launches in Europe¹³



Sustainable sourcing

- Organic and regenerative agriculture
- Investment in upcycling food byproducts to create nutraceuticals
- Ethical supply chain practices



Global influence

- Exports across Europe, North America, and Asia
- Plays key role in European Union (EU) regulatory discussions for health claims and food safety standards



Hola from Barcelona!

Vitafoods Europe is proudly making the move to the heartland of nutraceutical innovation – Barcelona – in 2025. This transition represents a renewed, innovation-driven focus for Vitafoods Europe and will offer a “*blueprint for success*” for brands aiming to enter or expand in the European market.

Why is Vitafoods Europe moving in 2025?

Feedback – Barcelona was a preferred hosting city by visitors and exhibitors.

Industry importance – Spain is a key market within Europe's rapidly expanding nutraceuticals market.

Room to grow – The move to Fira Barcelona, Gran Via enables Vitafoods Europe to grow in line with market potential, helping businesses tap into high-growth opportunities.

Better accessibility – Barcelona offers more available and affordable flights and accommodation, enabling us to welcome more visitors and create even more business opportunities for attendees.

Cultural fit – Experience Vitafoods Europe in a vibrant city that blends business with energy, culture, and excitement.

Illuminating key Spanish nutraceutical players



Leading probiotics manufacturer



Bespoke food supplement manufacturers



Experts in natural food supplements



Specialises in the distribution of chemical specialties and commercialisation of proprietary products



Monteloeder
by SUANNUTRA

Develop innovative, science-backed botanical ingredients



European leader in natural health and wellness products



Specialists in plant extracts



Expert in advanced active ingredients for skin and hair care



Leading producer of standardised herbal extracts and natural active substances



Focus on the future: What's next for Europe?

Understanding the current landscape is essential – but true industry leaders are always looking ahead and asking, “What's next?”. With the European nutraceutical market expanding rapidly and competition intensifying, brands need a clear, forward-thinking strategy to establish and solidify their presence. Here's what some of the world's leading nutraceutical experts think it will take to make a lasting impact in this diverse and ever-evolving landscape.

Investment in innovation

The shift towards personalised nutrition is accelerating, with consumers increasingly seeking tailored health solutions that meet specific lifestyle, age, and genetic needs. To stay relevant, brands should channel investments into R&D to develop products that align with evolving and increasingly nuanced preferences.

The opportunity? Epigenetics – the study of how our genetic background, behaviour, and environment can impact gene function – is key to tailoring nutrition and supplement strategies to individual needs. Diet has a major role here, and this space is wide open to investigation. Dr Jordana Bell, Associate Professor in Epigenomics King's College London, says, **“Our results show clear epigenetic and functional genetic changes after food intake, where some signals also relate to cardio-metabolic disease risk factors. Therefore, dynamic changes in epigenetic regulation of gene function can capture some of the inter-individual variation in metabolic response to diet. Gene regulation by epigenetics is one biological mechanism that may explain some of the reasons why we each respond to food differently.”**

Certain nutrients – like resveratrol from grapes or folate from leafy greens – may be able to influence gene expression linked to inflammation, metabolism, and longevity. So, personalised nutraceuticals could feature these ingredients to optimise an individual's gene expression for specific health goals.

Embracing AI

Artificial intelligence (AI) is reshaping the nutraceutical industry by providing new tools for research, product development, and personalised consumer interactions.

The opportunity? AI is becoming a “must”, not a “maybe”. Just one of the ways it can be utilised is for nutraceutical development. Here, AI can analyse vast data to identify functional ingredients, predict their interactions, and formulate effective combinations. Not only could this accelerate R&D and cut costs, but it means more effective and accessible supplements for consumers.

“Dr Mariette Abrahams, CEO & Founder of Qina, says, **“AI is already used for product development, ingredient discovery, conducting research, understanding consumer behaviour and innovation. In other words, ‘it is certainly not business as usual anymore.’ I believe that in the next few years, we will need to demonstrate that leveraging AI technologies has an impact on health and behavioural outcomes, either as a standalone or in combination with healthcare professionals. But ultimately, AI will completely change the way we discover new products.”**”

“IT IS CERTAINLY NOT ‘BUSINESS AS USUAL’ ANYMORE”



Staying compliant

New regulations – particularly around health claims, safety standards, and ingredient sourcing – are shaping how nutraceuticals are marketed and sold in Europe. It's important for brands aiming to introduce new nutraceutical products to the European market to remain agile and updated with the latest guidelines.

The opportunity? Global innovators, take note – there are some key steps to ensure compliance with EU standards:

1. Check the ingredient is compliant under the Food Supplements Directive or Novel Foods Regulation
2. Ensure health claims are European Food Safety Authority (EFSA)-approved
3. Label the product correctly to avoid market rejection
4. Consider partnering with an EU-based regulatory consultant

Futureproof ingredients and supply chains

The EU continues to tighten up sustainability regulations, impacting brands that source ingredients like krill and fish-derived omega-3s, botanicals, soy and pea proteins, and collagen. These companies will need to adapt to new compliance requirements and ensure any sustainability claims, such as “eco-friendly” or “sustainable”, are backed up by data.

The opportunity? If selling in the EU, it's important to identify any ingredients along the supply chain that might be affected by new regulations and then collect sustainability documentation. If working with suppliers, make sure they comply with marine, agriculture, and ethical labour standards. Think about using certification programmes, such as Marine Stewardship Council (MSC) certification for fish oil, to verify responsible sourcing. And prepare sustainability reports and environmental, social, and governance (ESG) strategies that align with Corporate Sustainability Reporting Directive (CSRD) requirements.

BY 26 JULY 2027:

The Corporate Sustainability Due Diligence Directive (CSDDD) requires companies operating in the EU to identify, prevent, and mitigate environmental and human rights risks in their supply chains.

ON 30 DECEMBER 2025:

The EU Deforestation Regulation (EUDR) expects companies to prove that specific raw materials have not contributed to deforestation.

EFFECTIVE 1 JANUARY 2025:

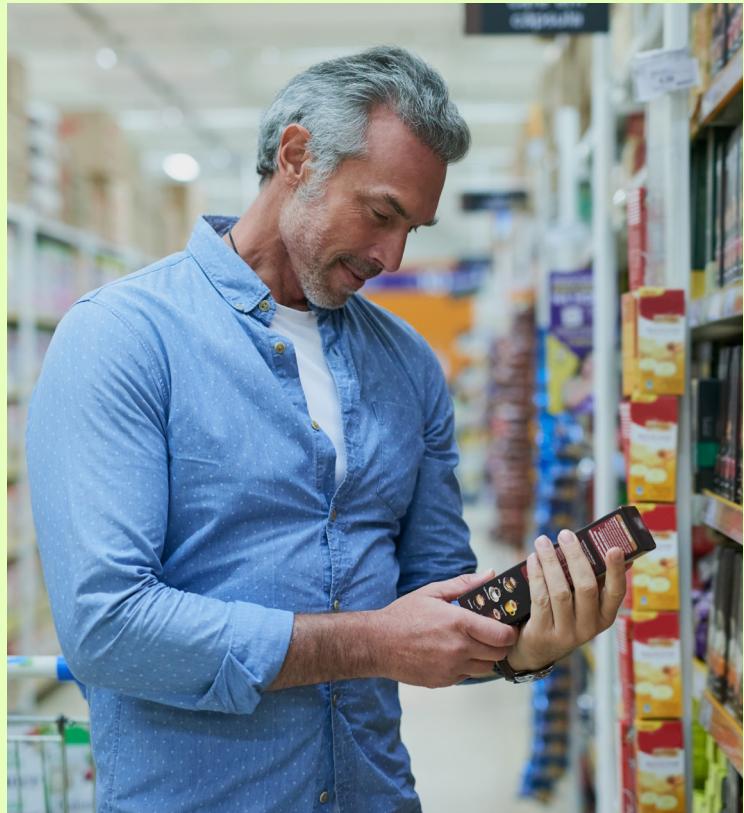
The Corporate Sustainability Reporting Directive (CSRD) asks large and listed companies to report their ESG impacts in detail.

Blurred lines between functional foods and nutraceuticals

Consumers increasingly look for enhanced health benefits in everyday foods – a trend that is expected to grow as consumers actively seek convenient products that seamlessly integrate wellness into their daily diets.

The opportunity? Nutraceutical brands don't need to stay in the supplement lane. If you haven't already, it's a good time to tap into the functional foods trend, incorporating benefits for body and mind. Think about mood-boosting treats, stress-supporting teas, or cognitive enhancing beverages and probiotic ice creams – the possibilities are endless. ***“Happiness is the number 2 personal value of most importance to consumers,”*** says Alice Bulonza, Senior Account Manager at Innova Market Insights. ***“This encompasses internal aspects – mental and emotional balance – but also external signifiers, like looking radiant, vital, fit, and being body-confident. All these characteristics are also drivers for the pursuit to wellbeing.”***

“NUTRACEUTICAL BRANDS DON’T NEED TO STAY IN THE SUPPLEMENT LANE”





Vitafoods Europe – Your vital ingredient for success in Europe

20 - 22 May 2025
Fira Barcelona Gran Via
Barcelona, Spain

The European nutraceutical market offers immense potential for growth, particularly for brands that are ready to innovate and tailor their offerings to local needs. Spain, with its vibrant innovation ecosystem, is the perfect starting point for any company looking to make its mark in Europe. By understanding the key trends, aligning with local consumer needs, and navigating the regulatory landscape, brands from around the world can unlock significant success in this thriving market.

Vitafoods Europe can help you unlock those opportunities – serving as a global platform for connection, inspiration, and empowerment.

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