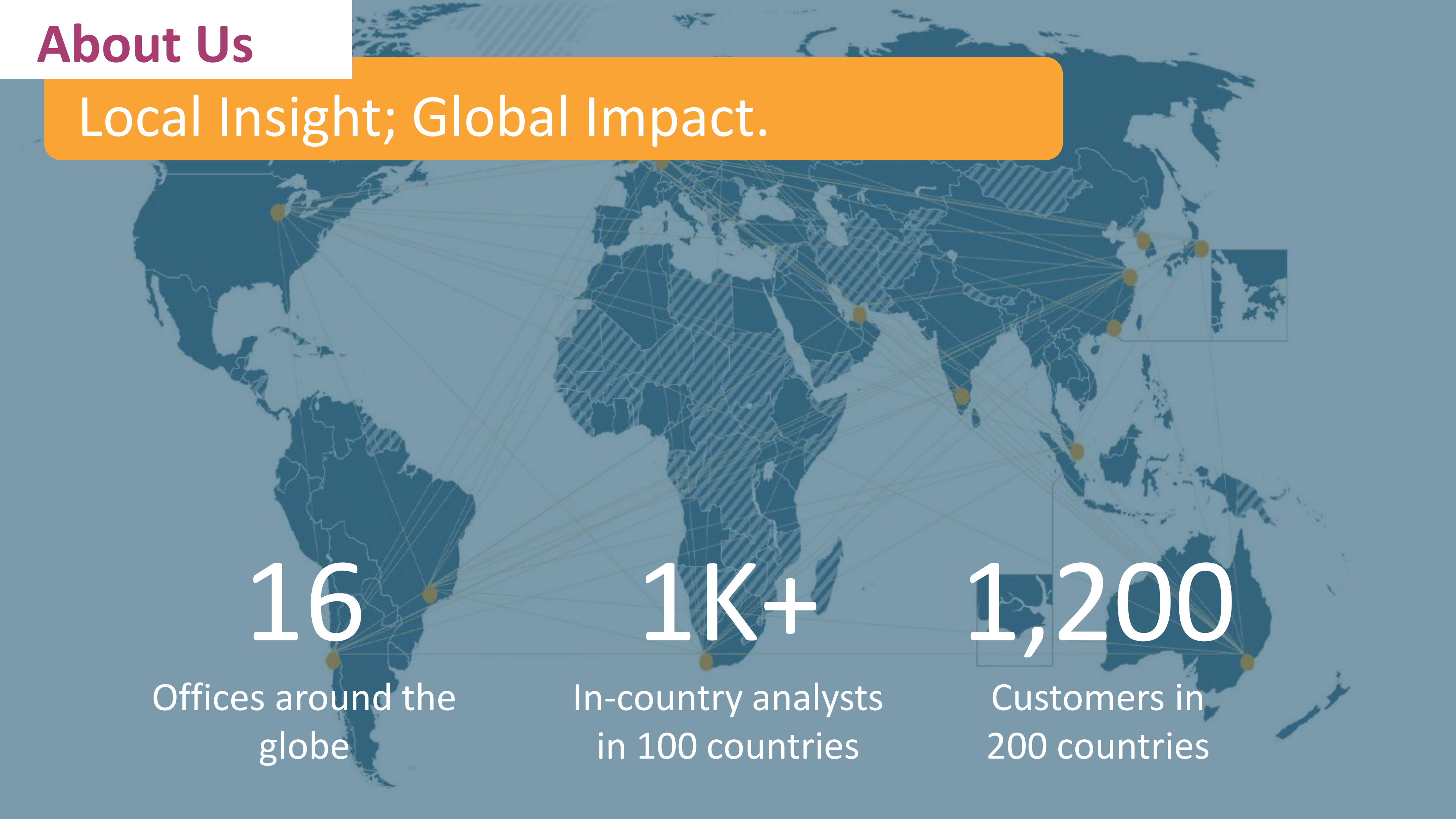
Health Supplement Market Report: Spain

July 2023

Euromonitor Consulting

About Us

Local Insight; Global Impact.



16

Offices around the globe

1K+

In-country analysts in 100 countries

1,200

Customers in 200 countries

Background

Asociación Española de Complementos Alimenticios (AFEPADI) represents companies that are active and operate within the dietetic foods and food supplement market in Spain. The AFEPADI provides the framework for the defence of the common interests of the industry and promotion of its products.

Objective

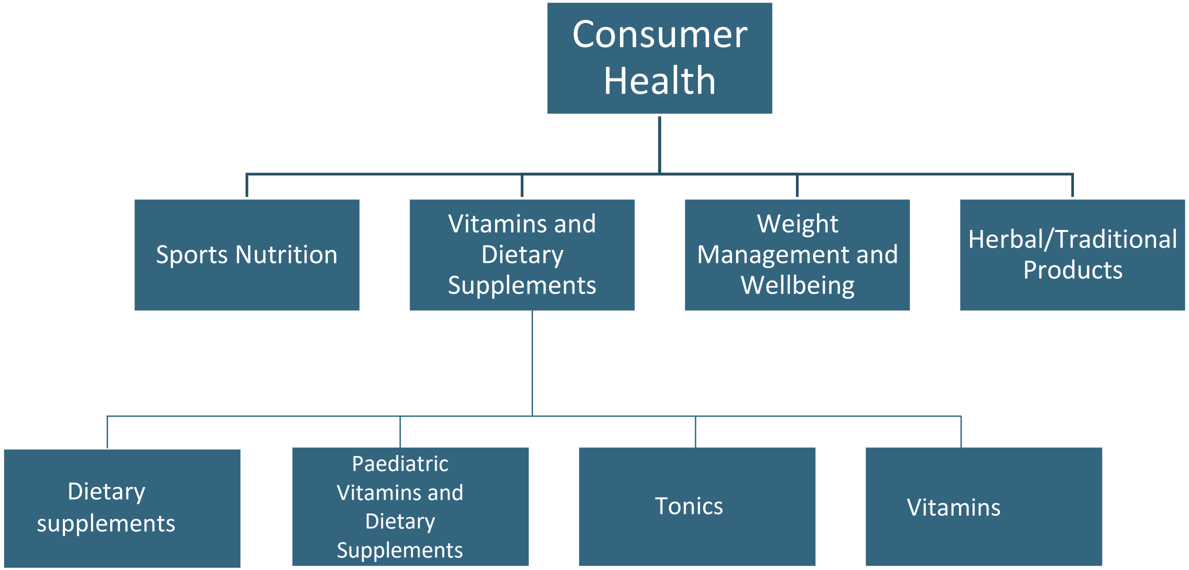
AFEPADI wishes to develop a Spanish-centric market report providing an overview of the 'health supplement' market which evaluates the evolution of the market and its performance relative to the rest of Europe.

Approach

AFEPADI has asked Euromonitor International to fully utilise our existing global and Spanish specific, 'health supplement' industry data and in-house expertise to develop a clear and concise market report to be shared among members.

Contents

Scope



Link to definition.

Note: Sports nutrition excludes energy drinks.

Market landscape

Regional overview
Cross-country comparison
Country deep-dive: Market size and trends
Market overview
Retail landscape

Europe

EUR33,420 mn | 2.4% | 3.3%

Consumer health

EUR16,287 mn | 3.1% | 2.7%

Vitamins and Dietary Supplements

EUR3,636 mn | 4.1% | 7.1%

Sports Nutrition

EUR2,556 mn | -0.7% | 1.5%

Weight Management and Wellbeing

EUR774 mn | 1.3% | 2.8%

Tonics

EUR9,458 mn | 1.6% | 3.3%

Herbal/Traditional products

EUR708 mn | 4.6% | 2.9%

Paediatric Vitamins and Dietary Supplements

Spain

EUR1,505 mn | 4.3% | 4.1%

Consumer health

EUR586 mn | 5.5% | 4.6%

Vitamins and Dietary Supplements

EUR92 mn | -1.5% | 7.9%

Sports Nutrition

EUR316 mn | 5.0% | 2.0%

Weight Management and Wellbeing

EUR11 mn | -3.9% | -0.4%

Tonics

EUR488 mn | 3.8% | 4.2%

Herbal/Traditional products

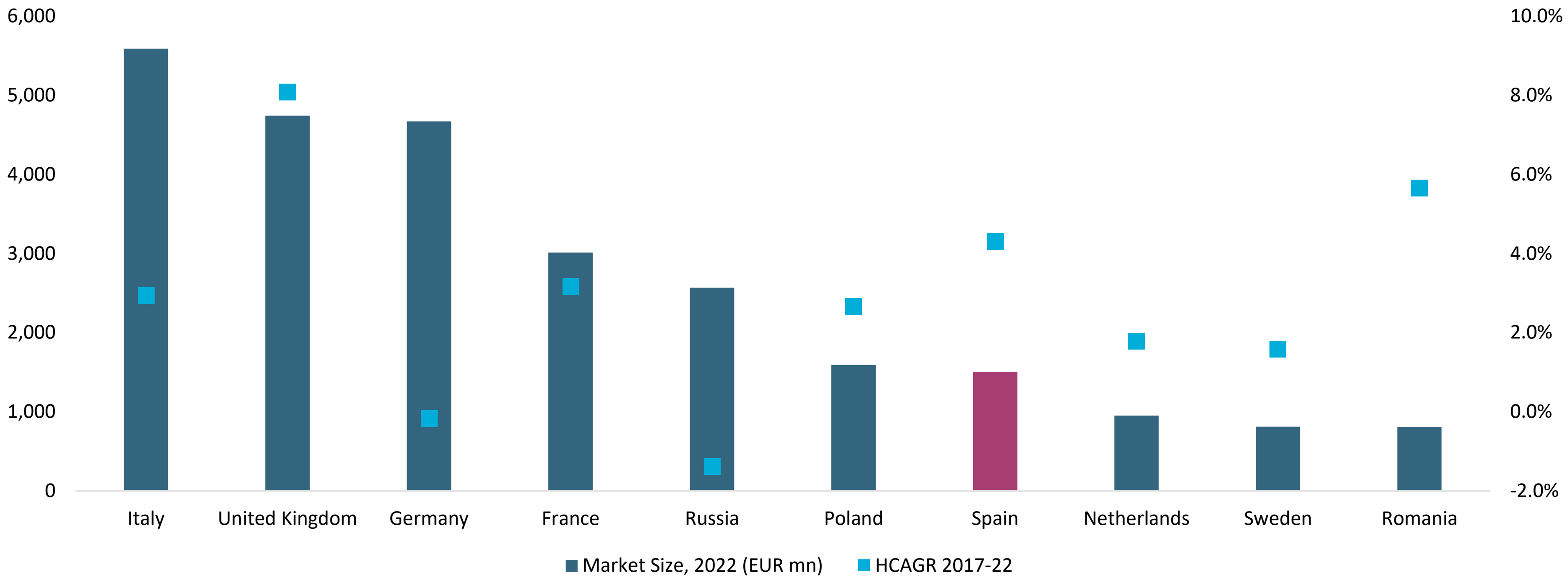
EUR11 mn | 10.9% | 4.1%

Paediatric Vitamins and Dietary Supplements

Market size, 2022 | HCAGR, 2017-22 | FCAGR, 2022-27

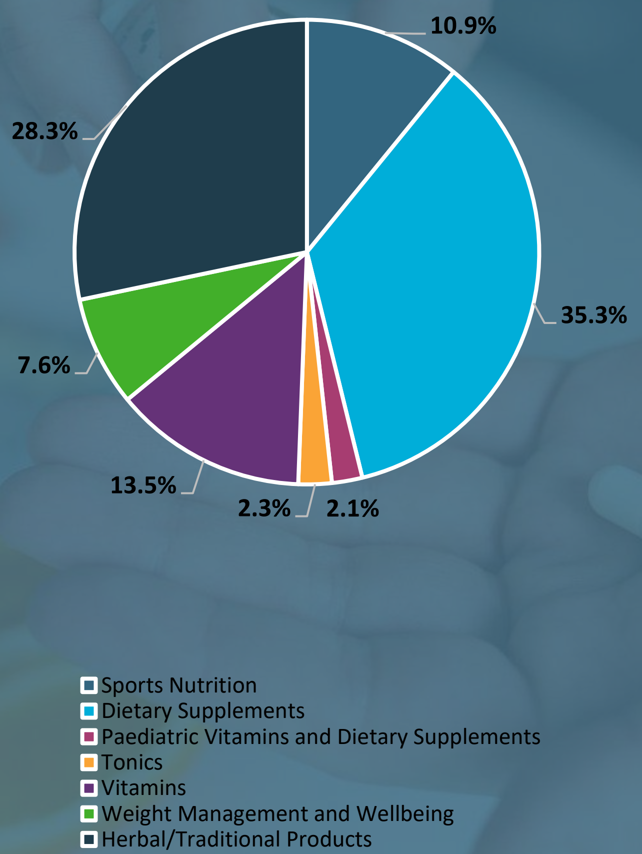
Despite being the seventh largest, Spain saw strong growth supported by new launches

Top 10 European Markets in Consumer Health, 2022

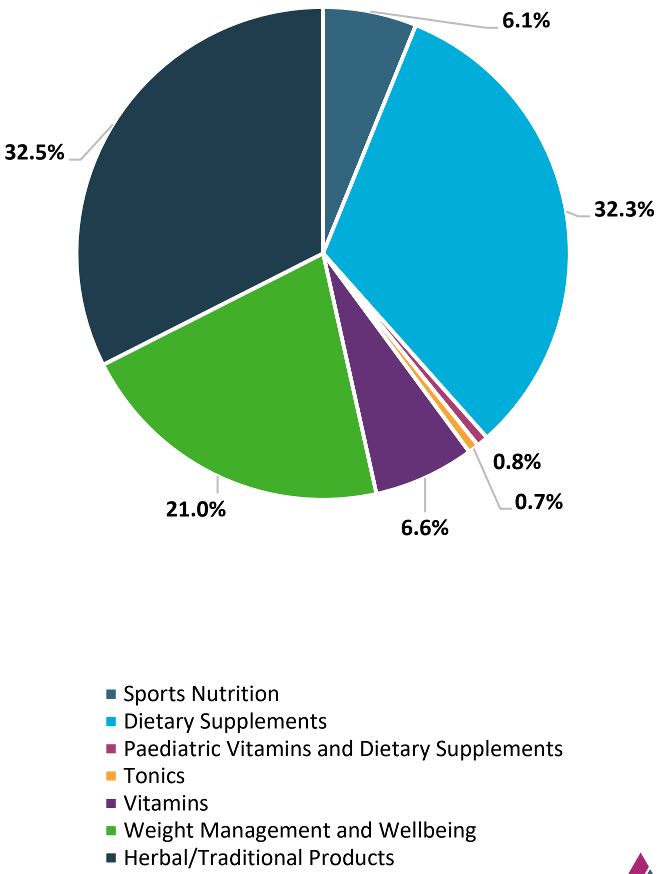


Note: Consumer health is an aggregation of sports nutrition, vitamins and dietary supplements, weight management and wellbeing and herbal/traditional products

Europe Consumer Health, 2022



Spain Consumer Health, 2022



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Rise in demand for plant-based supplements

There has been an increasing interest in vegan/vegetarian lifestyles in Europe as they are believed to be cleaner and more sustainable. However, these consumers are concerned about their low protein intake and are looking for ways to supplement it in their diets. Hence, companies are looking for ways to innovate and expand their portfolios to target the demand for plant-based protein.

A shake-up in distribution set to continue

E-commerce continues to assert its emergence as a viable retail distribution channel. Its wide reach, convenience, increased product visibility, personalisation, cost efficiency, diverse product range, and regulatory compliance contribute to the growth of consumer health product companies in the European market. Meanwhile, direct-selling companies benefit from a personal connection with shoppers.

The blurring of industries and categories

With consumers taking a holistic approach to health, this leads to more competition. Foods and drinks companies have entered the fray with their health-positioned products and Big Pharma moves away from strictly regulated OTC/RX towards high-margin supplements. At the same time, technology companies are addressing consumer needs states with both gadgets and apps.

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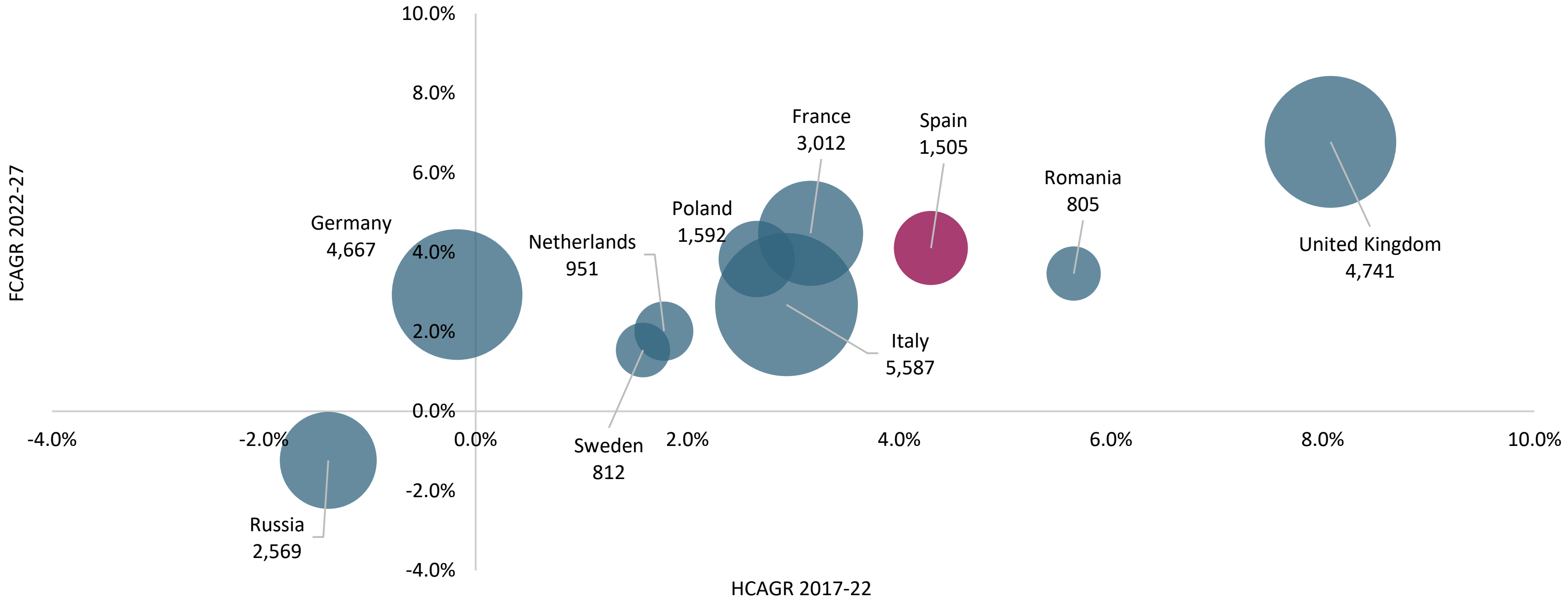
Health turmoil fuels health awareness, positively impacting consumer health

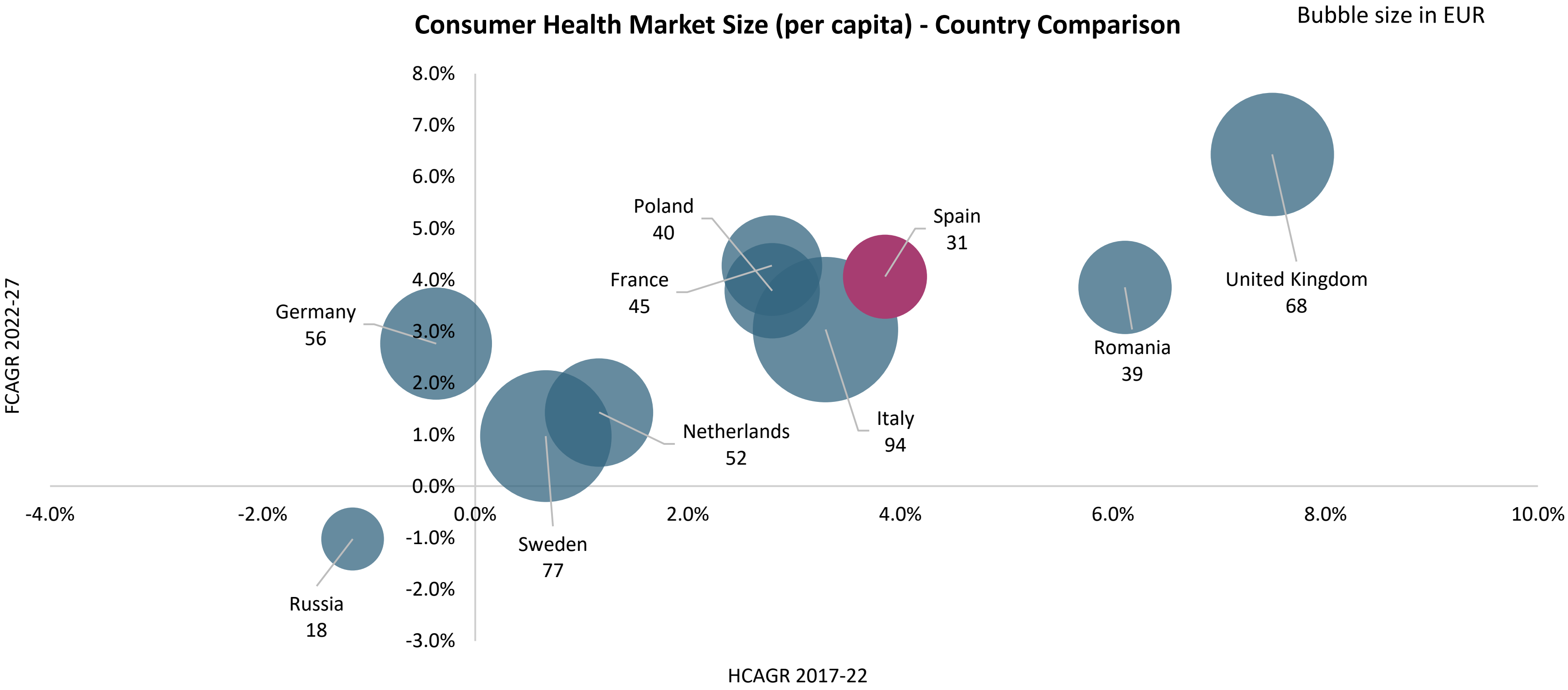
Consumer Health market size - country comparison

Bubble size in EUR million



Note: Consumer health is an aggregation of sports nutrition, vitamins and dietary supplements, weight management and wellbeing and herbal/traditional products

Preventive healthcare and increased interest in wellbeing drove consumption



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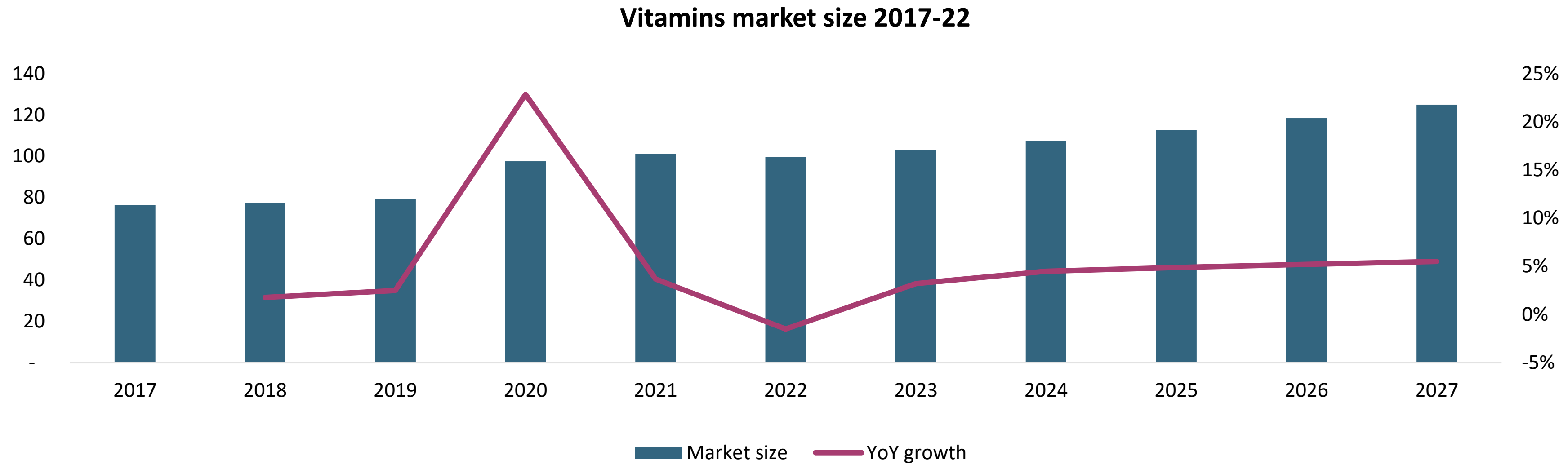
Vitamins

Shift in preference from general to immune-boosting vitamins impacted growth



- Having boomed in 2020 due to the pandemic, demand growth for vitamins slowed significantly in 2021 and contracted in 2022 as people were looking to improve their immunity over consuming general vitamin supplements.
- However, over the forecast period, vitamins positioned as immune system boosters are likely to thrive. People are actively seeking ways to strengthen their immune systems as part of their broader pursuit of overall health improvement, which is expected to contribute to the growth of the market.

Vitamins grow as a medium to supplement nutritional intake as Spaniards have specific diets

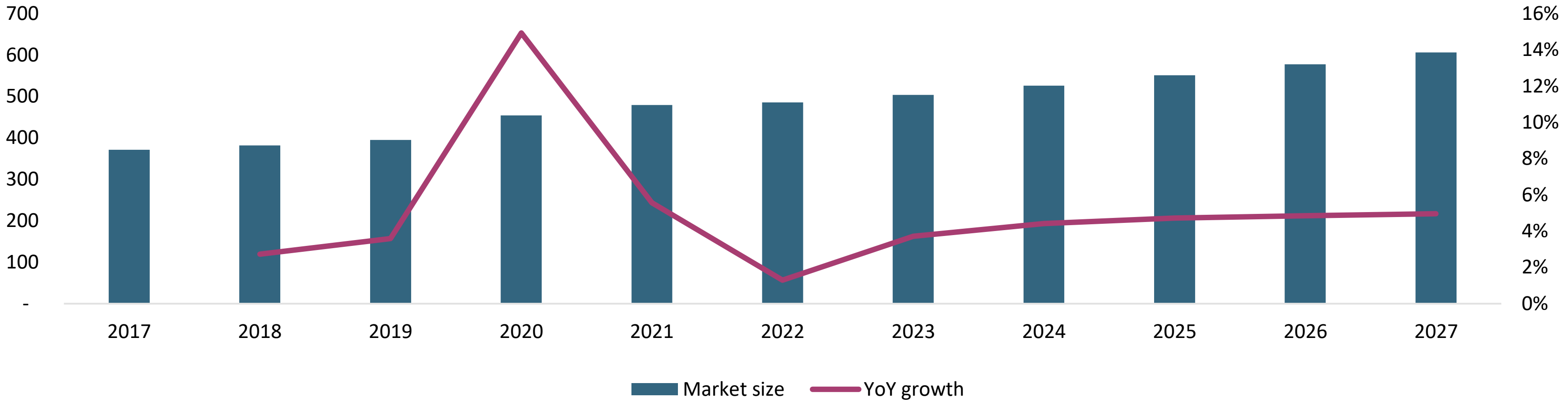
Consumers’ preference for immunity boost favour demand for vitamins

The ageing population will be a significant growth opportunity, although they need more encouragement

Dietary Supplements

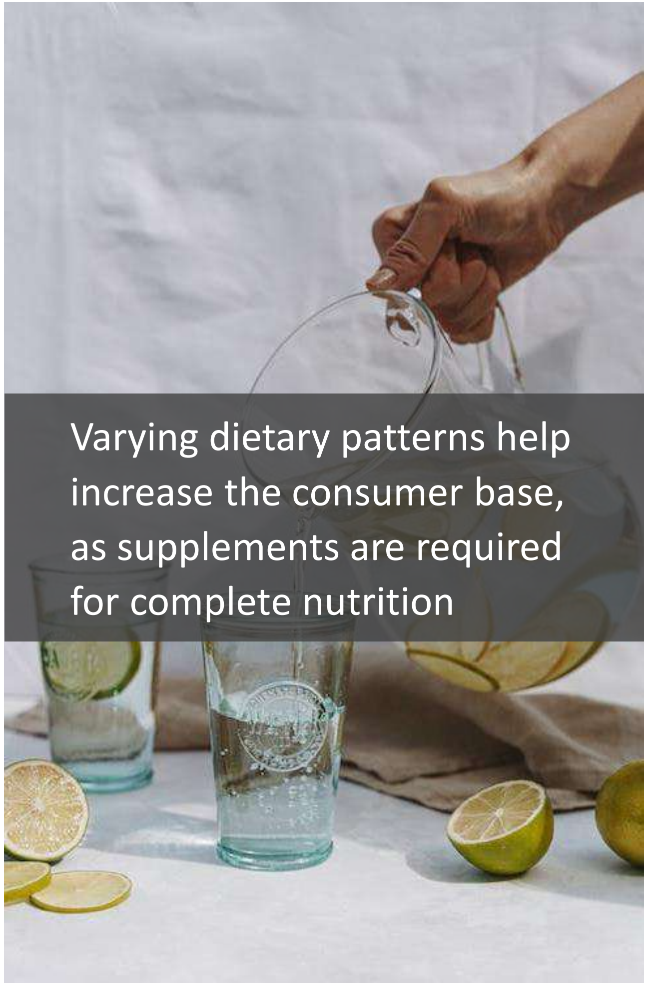
Rising health consciousness drives demand for immune-boosting dietary supplements

Dietary Supplements market size 2017-22



- 2020 exhibited double-digit growth in retail value sales as consumers focused on their health during the pandemic. However, it slowed significantly in 2021 and 2022 as vaccination rates increased, and symptoms were less severe.
- However, the pandemic has heightened interest in immune-boosting dietary supplements due to growing health consciousness among consumers, leading to increased demand. As a result, this is likely to improve retail sales over the forecast period, as the market is experiencing strong growth and attracting new entrants.

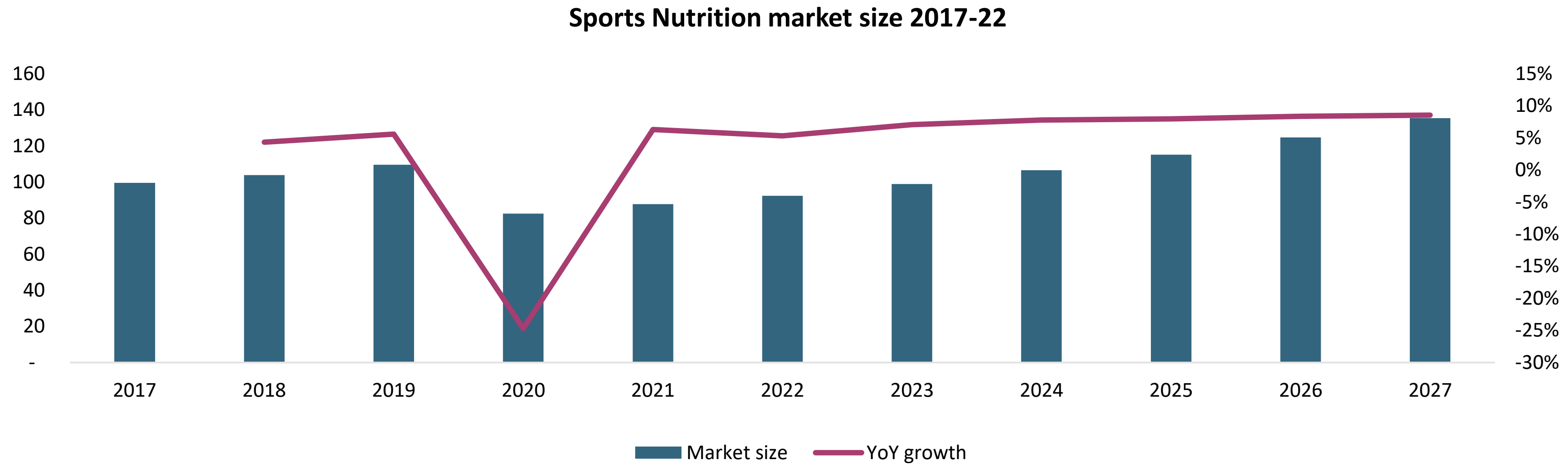

Youthful appearance remains a priority amongst Spaniards and products that slow down ageing are in demand


Varying dietary patterns help increase the consumer base, as supplements are required for complete nutrition

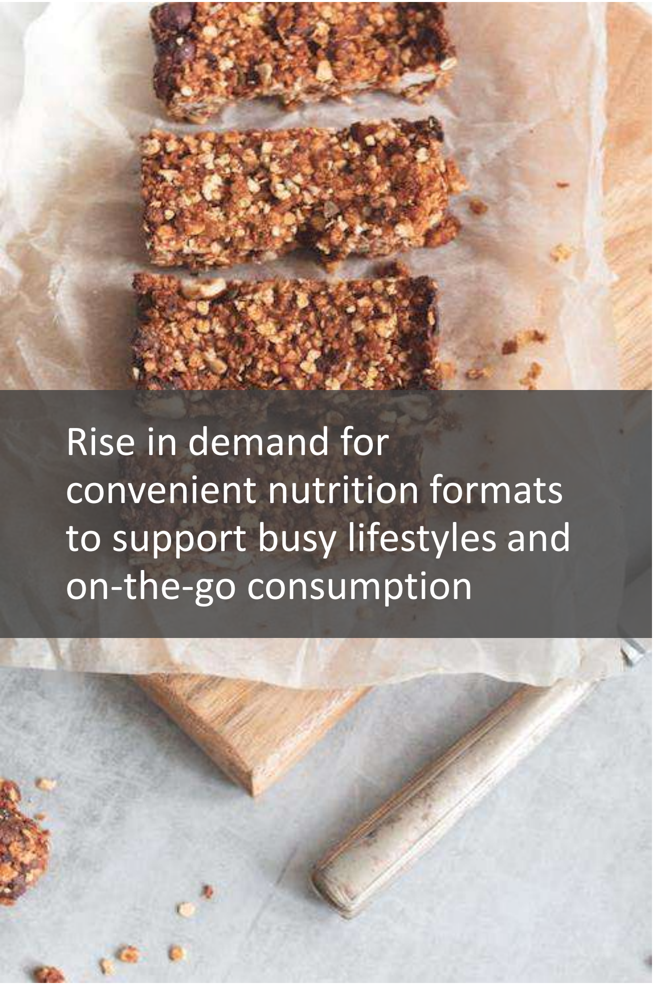

To validate the effectiveness of their product claims, brands are partnering with influencers

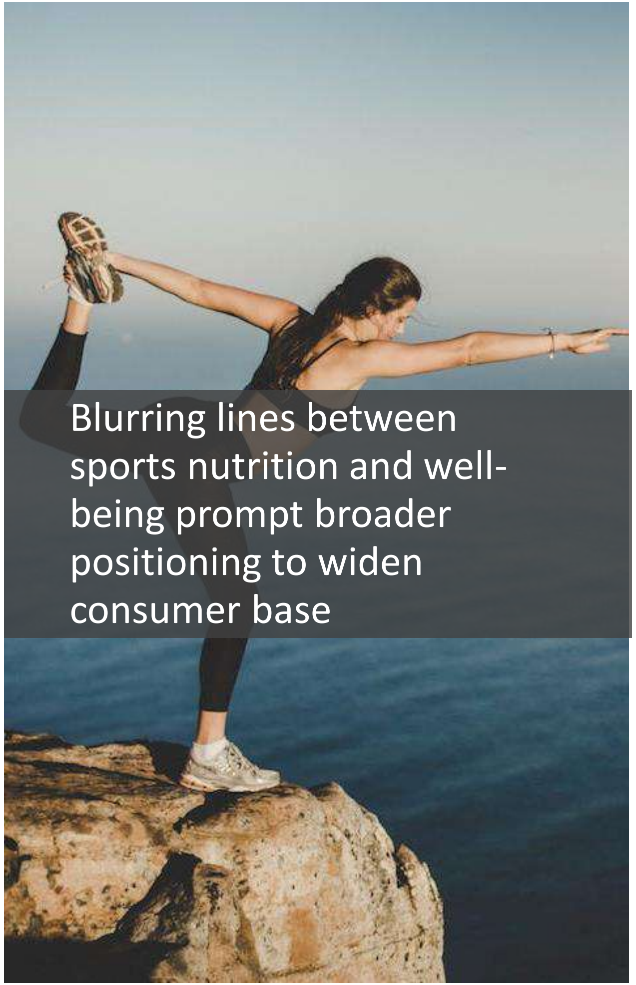
Sports Nutrition

Shifting consumer preferences hinder sports nutrition sales below pre-pandemic levels



- After a significant decline in 2020 due to the pandemic, retail sales experienced a notable resurgence in 2021 and 2022. However, despite these improvements, sales figures remained considerably lower compared to pre-pandemic levels due to consumer preferences having shifted to packaged food with protein components over sports nutritional products during the pandemic.
- Nevertheless, a rebound in sales is expected during the forecast period due to the growing interest in health and wellness. The shift towards a more active lifestyle is anticipated to drive further growth in the market size.





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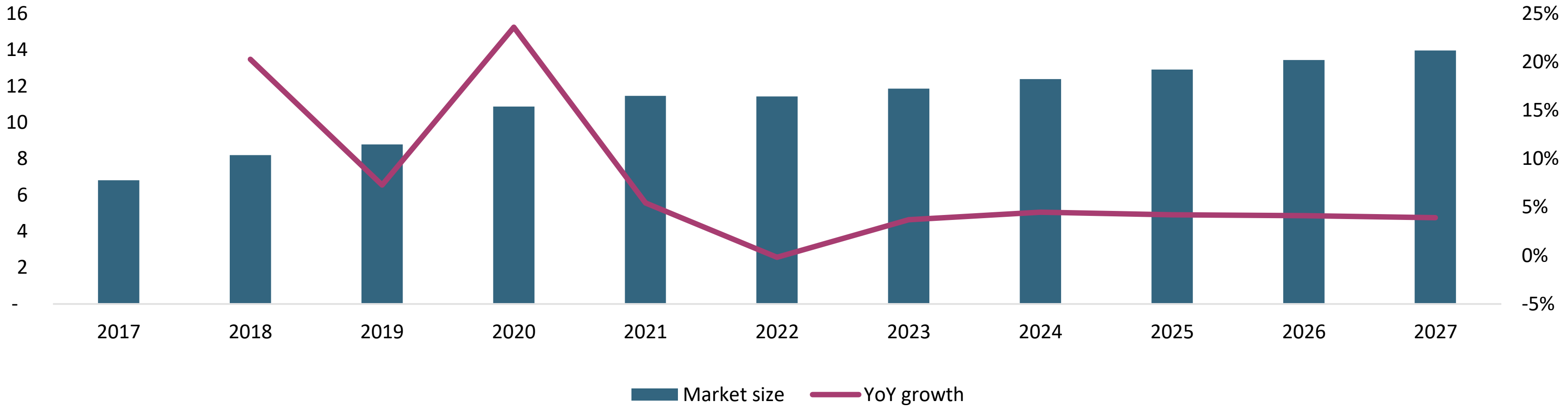
Paediatric Vitamins and Dietary Supplements

Demand for general vitamins fell as focus on prevention and immunity was prioritised

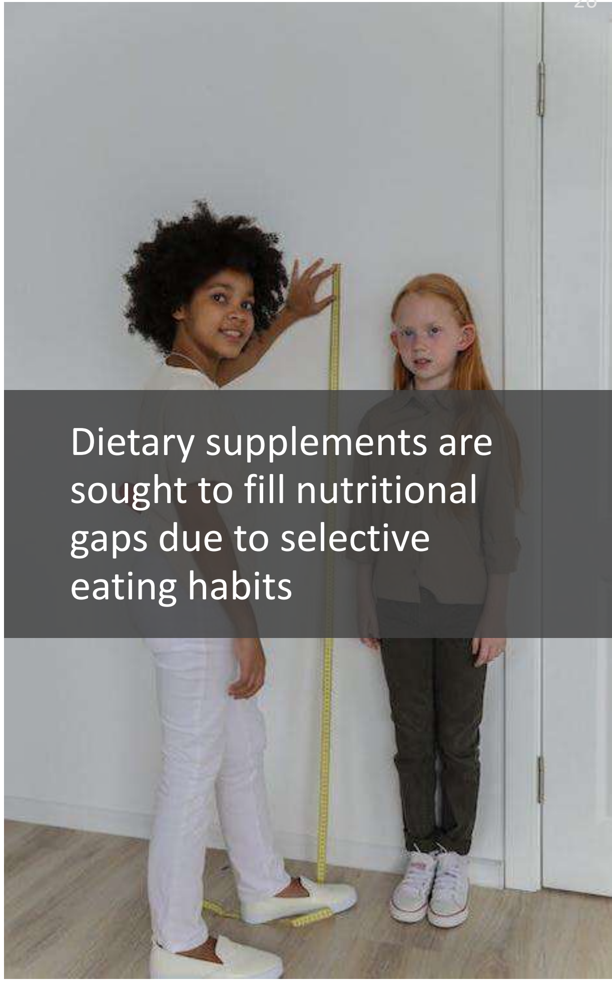
Paediatric Vitamins and Dietary Supplements market size 2017-22



- Retail value sales declined in 2022, with a declining birth rate at the root of this, along with delayed parenthood and families opting to have one or, at most, two children.
- However, post the pandemic, parents have been focusing on single vitamins such as vitamin C and vitamin D, as well as other categories of dietary supplements with an explicit immune-boosting positioning. This focus is expected to contribute to the growth of the market, although year-over-year (YoY) growth is likely to be stagnant.

Parents are actively seeking probiotics for children to improve their gut and immune health

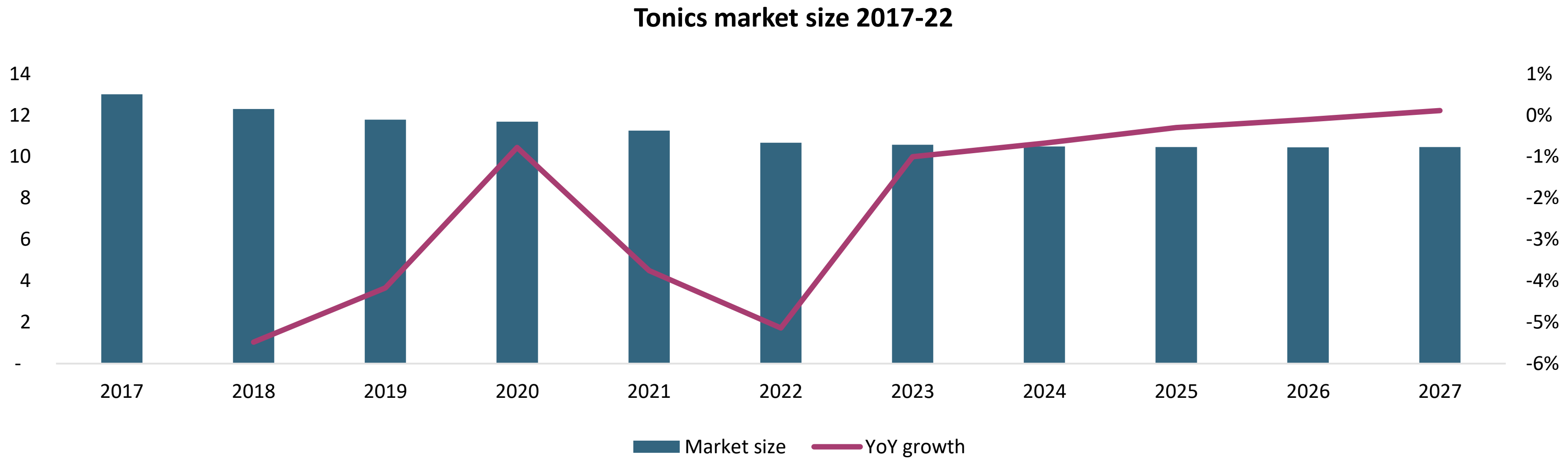
Heightened interest in preventative healthcare is likely to boost demand for paediatric vitamins



Dietary supplements are sought to fill nutritional gaps due to selective eating habits

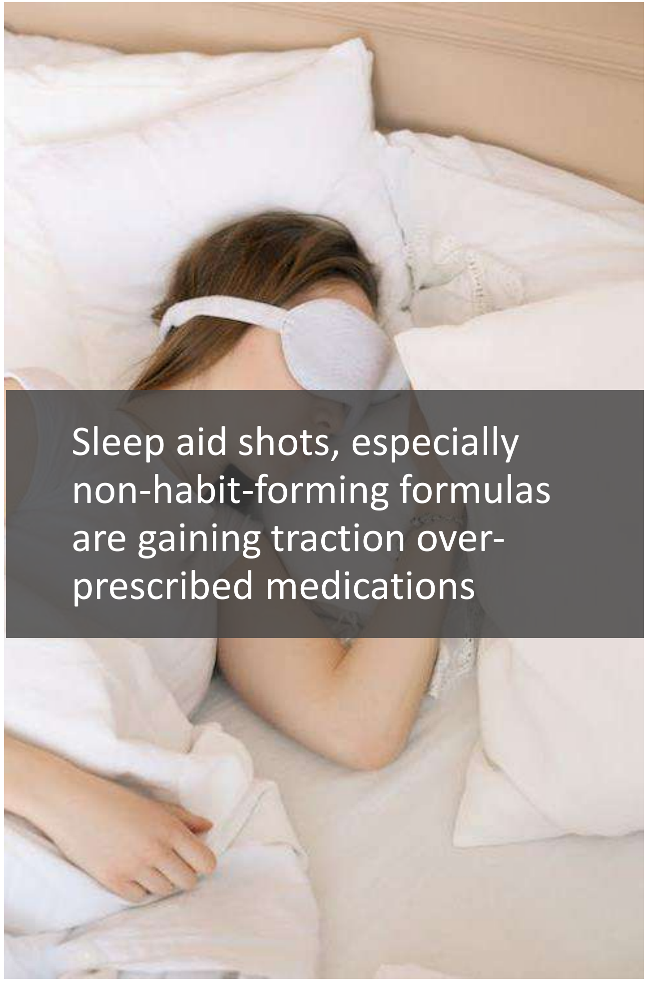
Tonics

Rigid view on tonic medications and lack of innovation impacts growth rate



- The market size for tonics saw a continuous decrease in 2020 and 2021, which was further reduced in 2022. Lack of product innovation to incorporate positioning beyond nutritional needs like aiding with sleep and stress is a major factor.
- Moreover, tonics are mostly perceived to be products that can be used only with prescriptions from professionals. Hence people prefer using consumer health products that can be easily self-medicated like vitamins.


Tonics positioned as energy and focus boosters are becoming popular in Spain

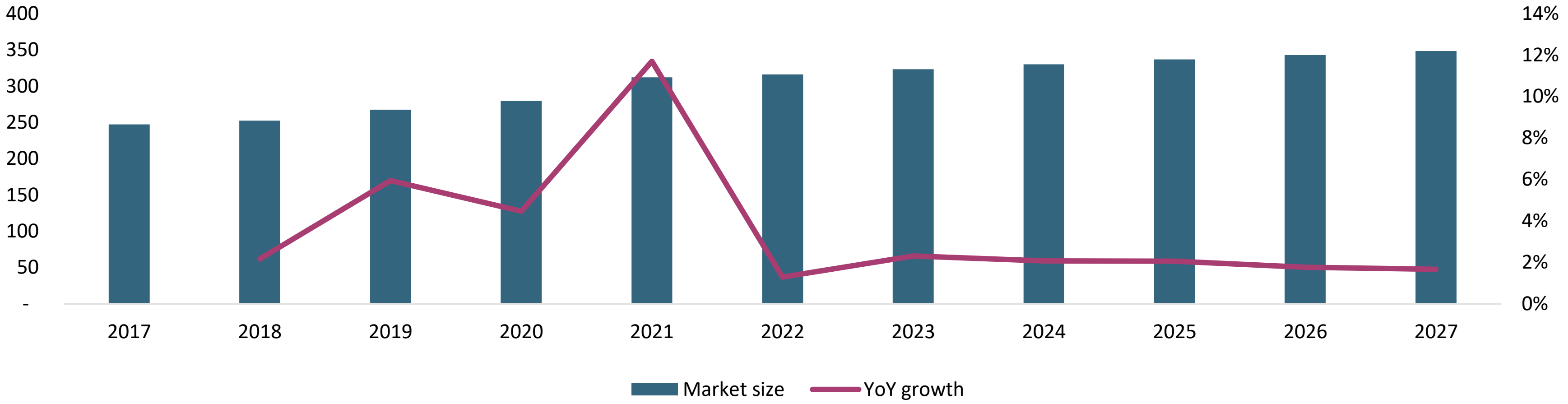

Sleep aid shots, especially non-habit-forming formulas are gaining traction over-prescribed medications


Consumers are increasingly appreciating natural ingredients in tonics and associate them with superior quality

Weight Management and Wellbeing

Lack of new product development and positioning has slowed down the growth

Weight Management and Wellbeing market size 2017-22



- 2021 exhibited double-digit growth as people started travelling more after the pandemic restriction eased, thus putting more focus on weight management as they wanted their bodies to be appealing during vacations.
- However, in 2022 there was a dip, due to the body positivity trend as many consumers are actively rejecting weight-loss products to embrace 'healthy' over 'beautiful'. Companies have hopped on this trend of naturalness and are launching products to support this process, which is expected to contribute to the growth of the market over the forecast period.

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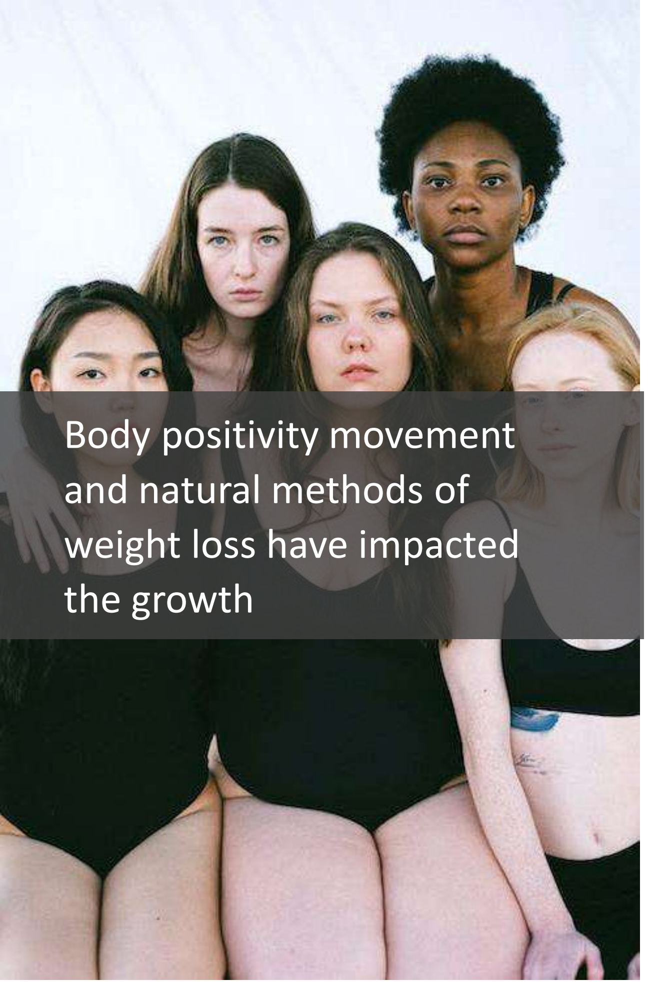
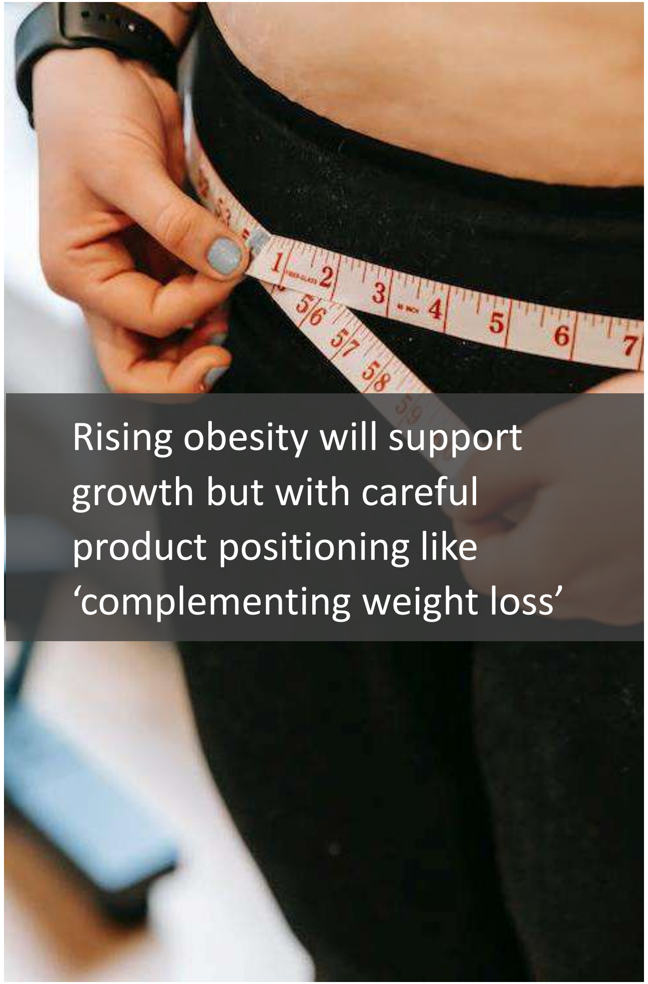
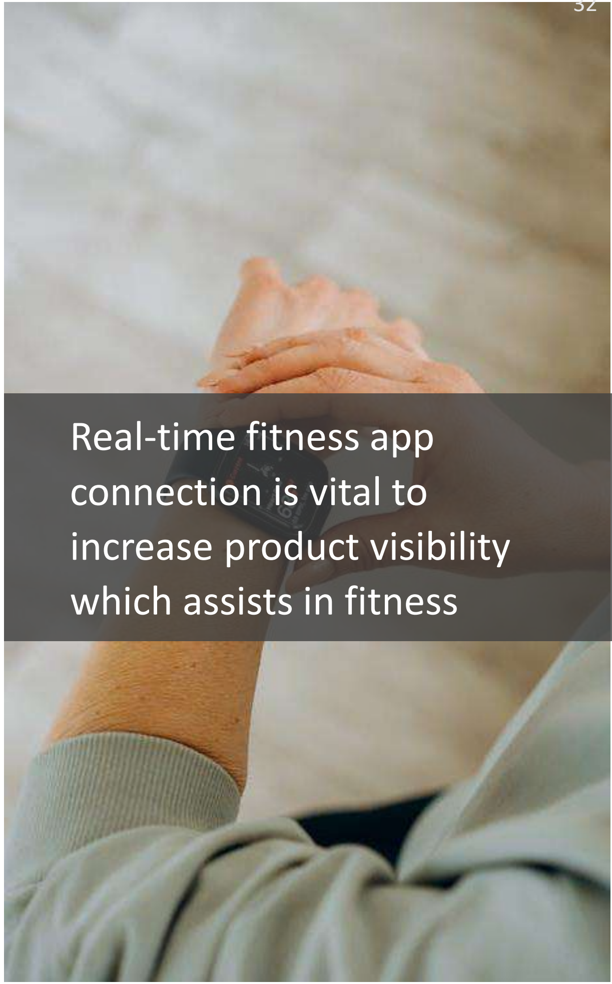


Body positivity movement and natural methods of weight loss have impacted the growth



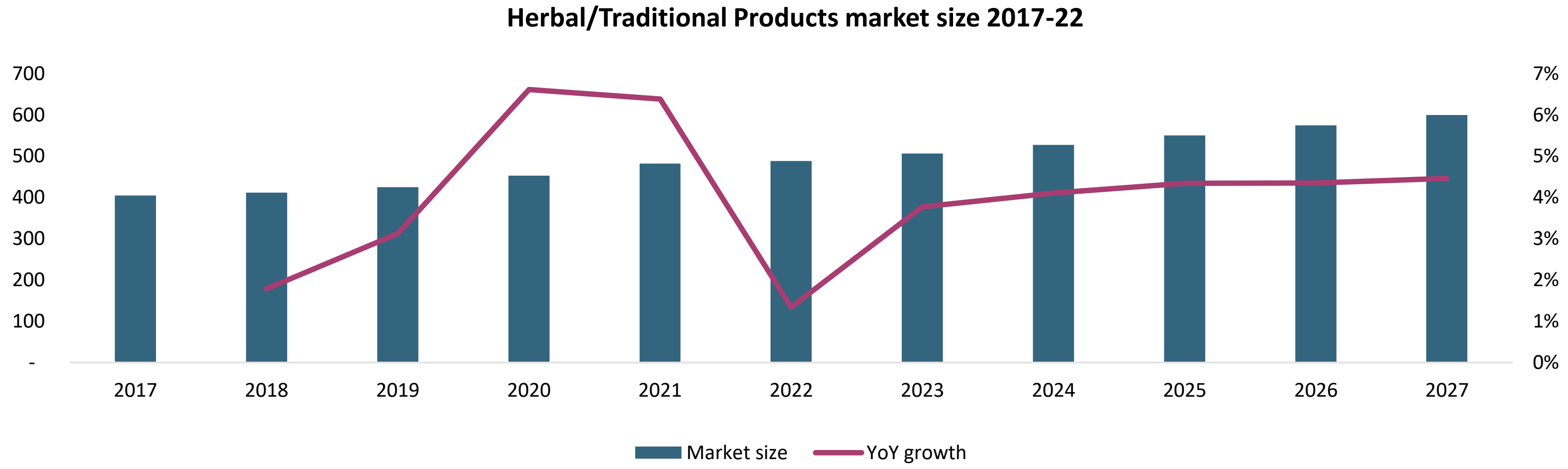
Rising obesity will support growth but with careful product positioning like 'complementing weight loss'



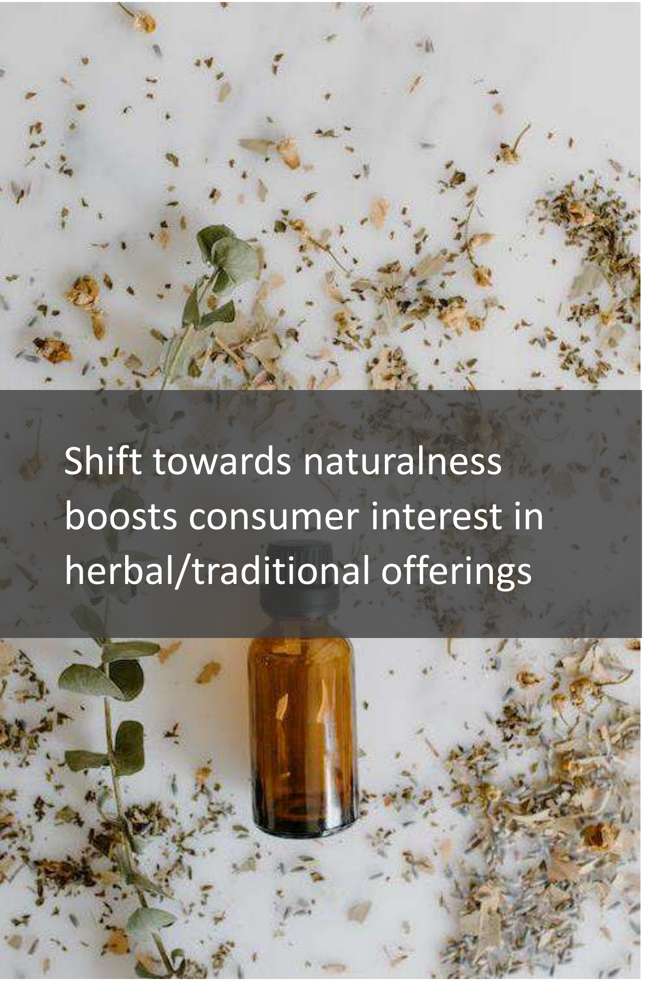
Real-time fitness app connection is vital to increase product visibility which assists in fitness

Herbal/Traditional Products

Self-medication was key to the increase in the market size of herbal/traditional products



- Retail value sales continued to increase primarily because people started self-medicating and invested in taking care of their health and felt comfortable using herbal/traditional products.
- New product development which focuses on chemical-free claims and natural processing methods in the herbal/traditional offerings is expected to help boost growth.



Shift towards naturalness boosts consumer interest in herbal/traditional offerings

Herbal/traditional sleep aids remain the top performer as it helps with prolonged symptoms of COVID-19

The pace of new product development, positioning and marketing of products will remain robust

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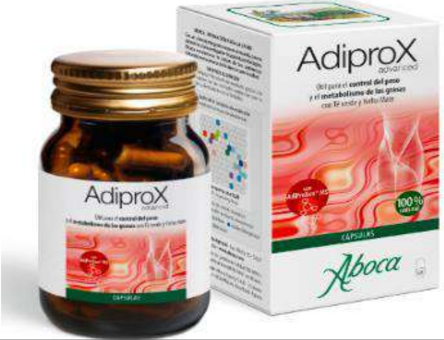

Just Loading Protein Bar

Just Loading insect protein bar combines **insect protein (*Tenebrio molitor*)** and vegetables (pea, soy and pumpkin) and is **the first product manufactured in Spain** with this type of sustainable protein.

AdiproX advanced

These capsules are **metabolic reactivators** that support weight control by promoting adipose tissue activity, aiding liver and hypothalamus functioning, and reactivating the body to **counteract metabolic blockade-induced inactivity**.

PanaNatra Sleep & Pain Relief

PanaNatra Sleep & Pain Relief uses **KSM-66 Ashwagandha**, a comprehensive root extract that retains the natural balance of the herb, helping unlock dual benefit of Ashwagandha that **helps promote sleep and relieve mild pain.**

Arko Pharma Figurmed Shake

This product contains **Metabolaid -an innovative complex of patented plant extract (verbena and hibiscus flower)**, which helps in weight loss, maintaining weight after weight loss, fatigue and metabolism.

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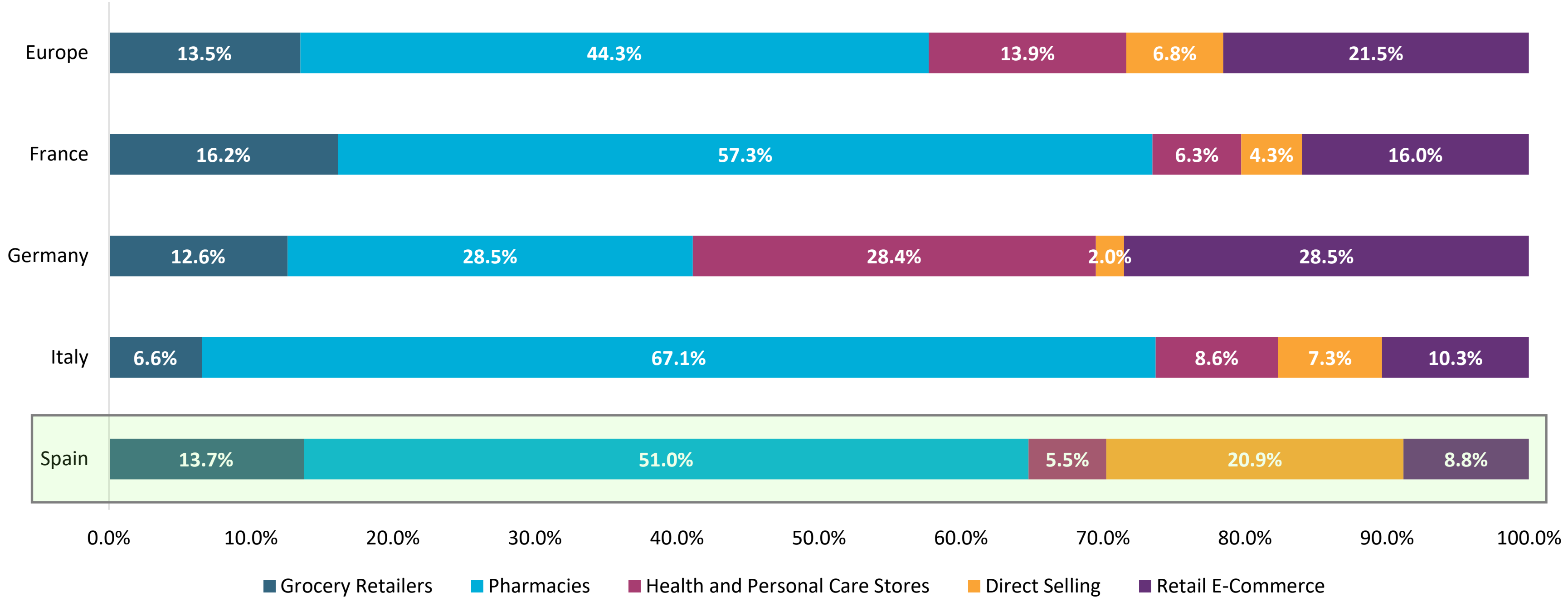
Spain: an e-commerce laggard with direct sellers holding firm

Regional Overview: Consumer Health Channels split (%)



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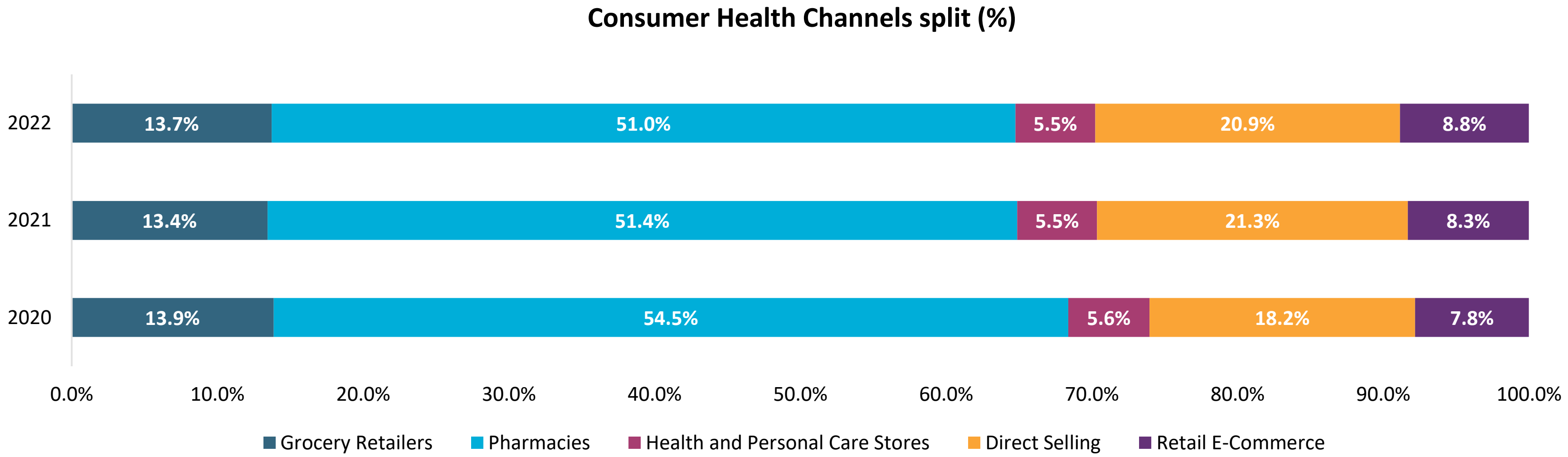
E-commerce's growing market share attributed to its convenience

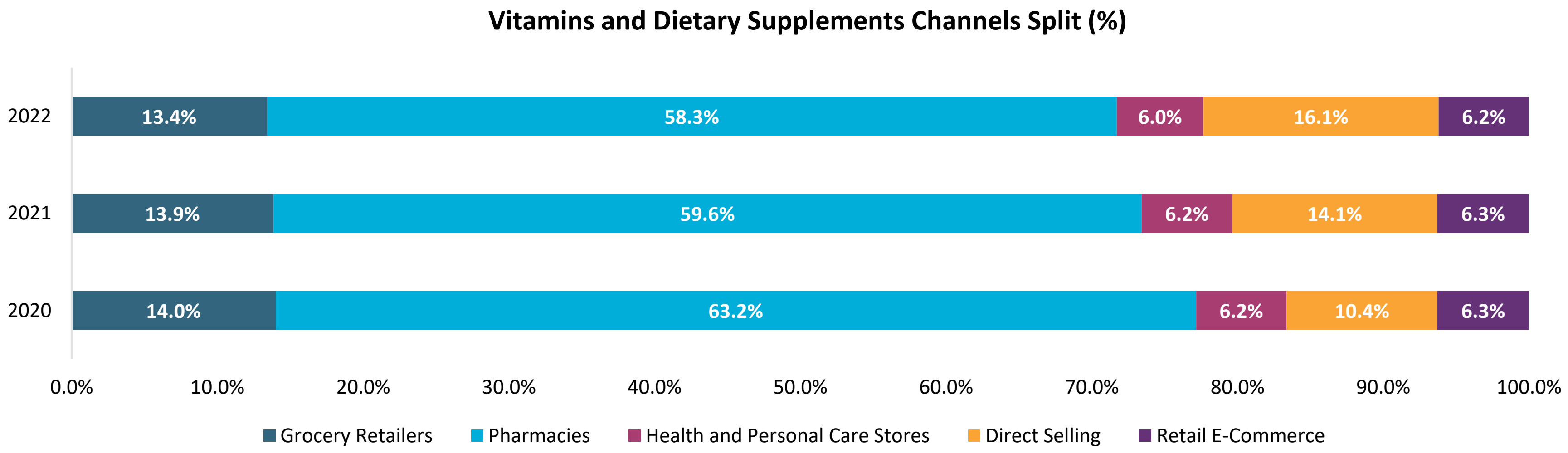


E-commerce showed a continuous increase in share as it was convenient during the pandemic and continues to be popular among Spanish consumers for its competitive prices, shorter delivery time and lower delivery costs.

In 2022, pharmacies lost their share to direct selling, which is a popular and preferred channel for its testimonial manner of selling and is popular for consumer health.

Note: Consumer health is an aggregation of sports nutrition, vitamins and dietary supplements, weight management and wellbeing and herbal/traditional products

Return to pre-pandemic ways enables direct selling to steadily increase its channel share



Even though their channel share is declining, pharmacies continue to dominate the retail landscape as it allows consumers to purchase products at competitive prices, with a wide array of brand options available to them.

Channel share of direct selling is increasing compared to pharmacies, as they provide consumers with a forum to connect with like-minded individuals, share experiences, and access additional resources related to health and wellness.

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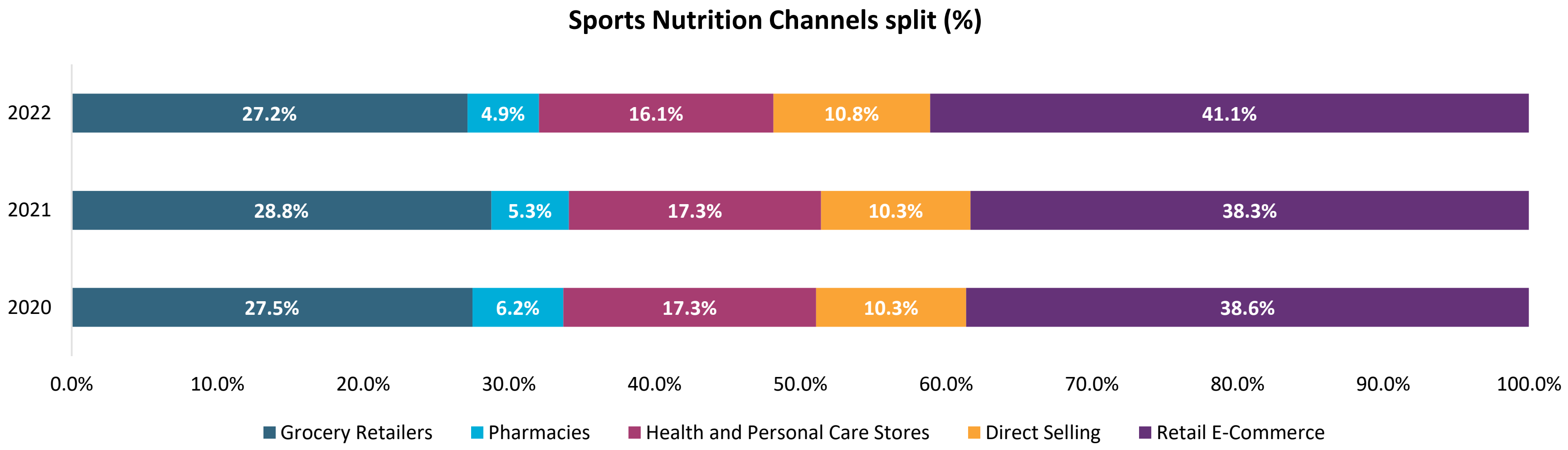
The popularity of e-commerce for sports nutrition is driven by its competitive pricing

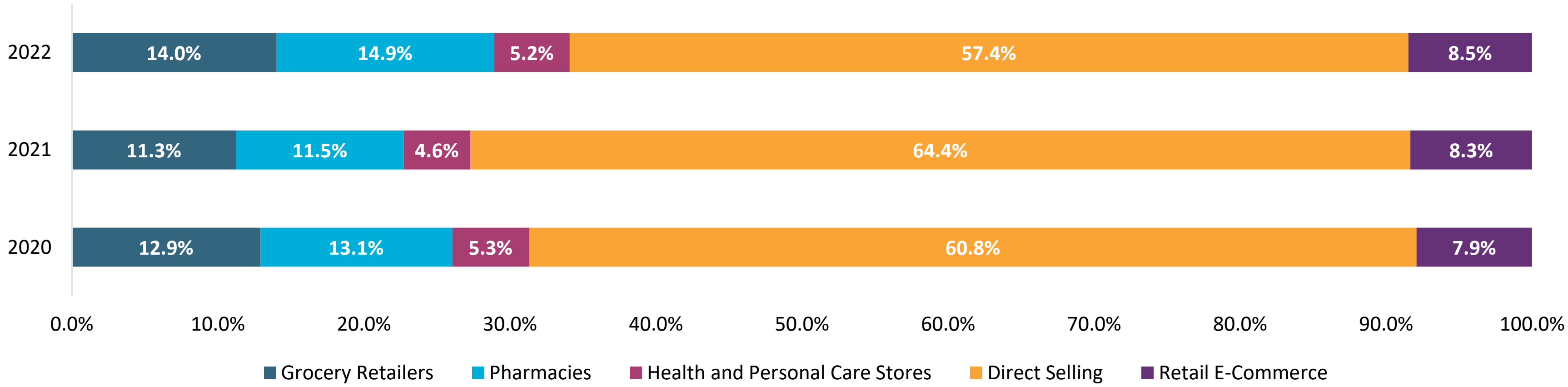


Retail e-commerce channel which was already important prior to the onset of the pandemic, continues to dominate the retail channel while some brands focused more on grocery retailers as a source of additional sales.

As more gyms and sports facilities opened in 2022, many people started buying products from the consumer food service facilities attached to their gyms or sports clubs, which helped improved direct selling in 2022.

Direct selling competes with customised solutions from health and beauty specialists

Weight Management and Wellbeing Channels split (%)

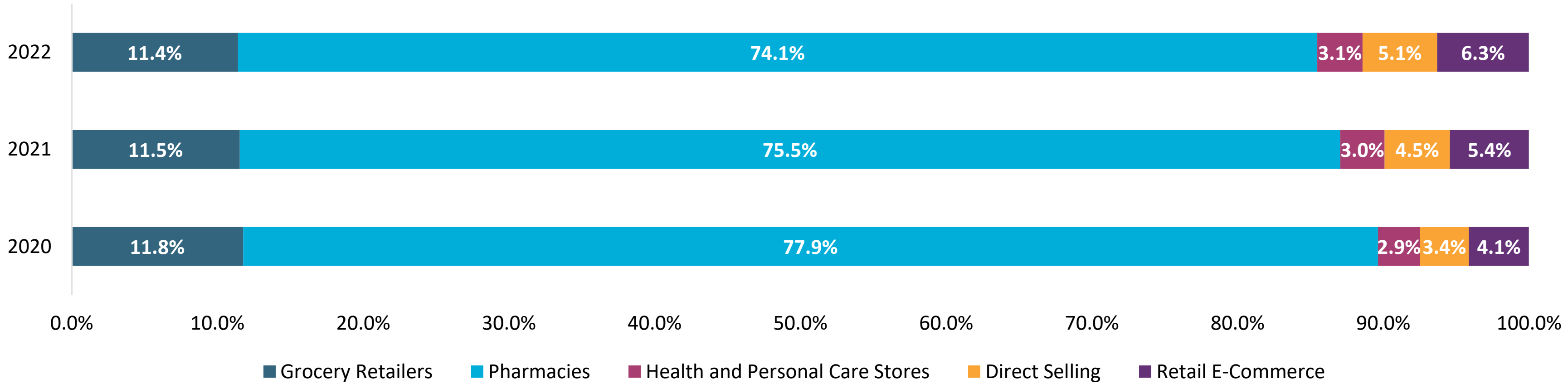


Direct selling is the dominant channel because distributors often have firsthand experience with the products and can share their personal success stories or testimonials which appeal to consumers.

However, direct selling is losing share to health and beauty specialists as they can give customised products based on the nutritional requirements, while grocery retailers and e-commerce offer competitive prices.

Pandemic restrictions boosted self research and channel share for retail e-commerce

Herbal/Traditional Products Channels split (%)

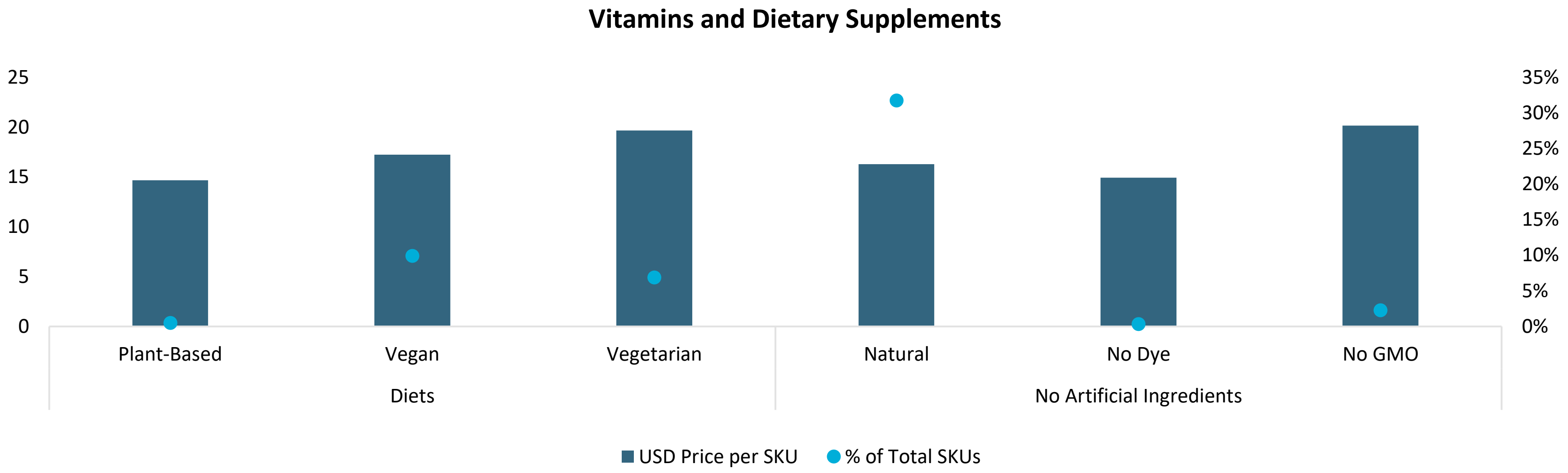


Health and beauty specialists are the most prominent retail channel as these retailers are knowledgeable and often share a first-contact relationship with consumers, making them reliable.

Access to meet health and beauty specialists was cut massively due to the pandemic. Thus, people started doing their research and buying products online, which have competitive prices, boosting the share of retail e-commerce.

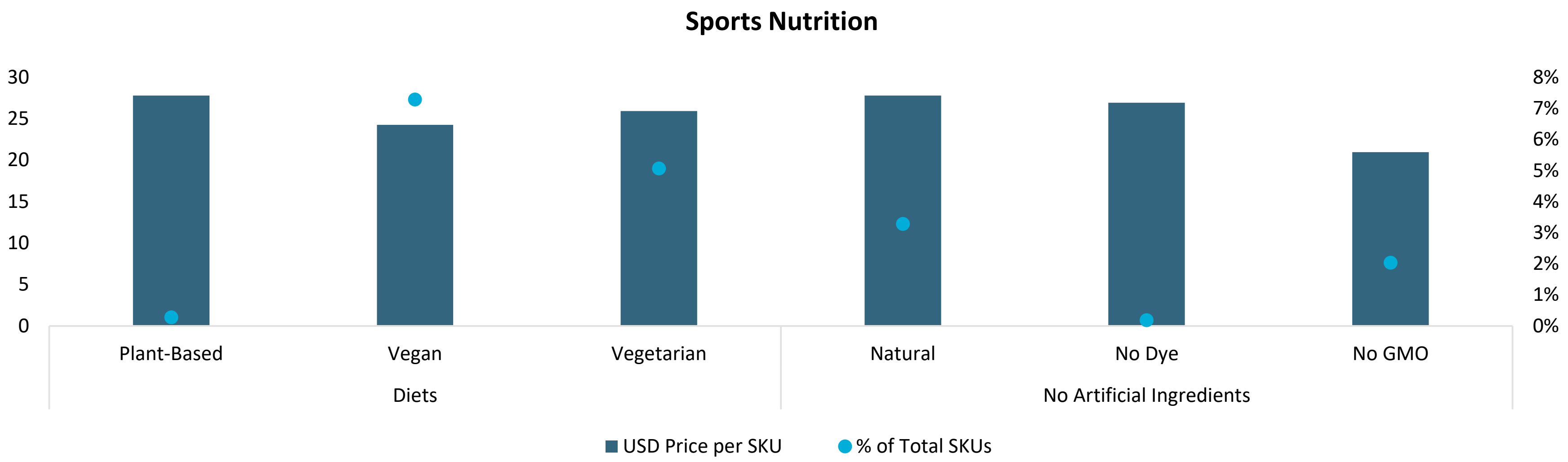
Sustainability claims in Spain

Natural claims are driven by a demand for healthy and sustainable diets



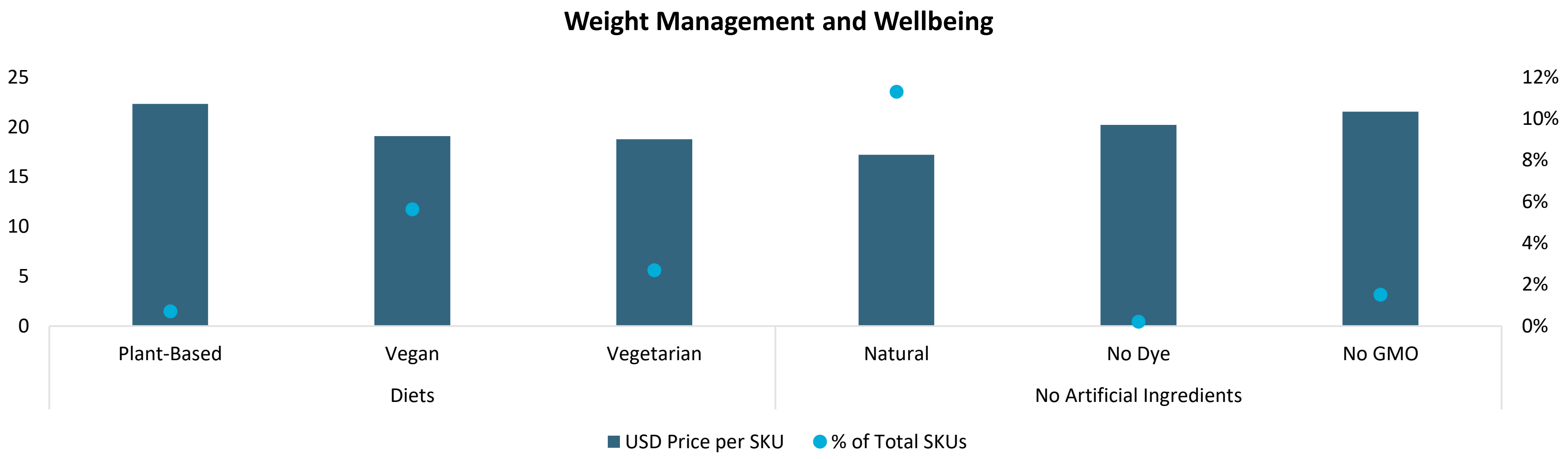
- Vegan and natural claims in vitamin and dietary supplement products are the most popular as it helps aid consumers with dietary restrictions like lactose intolerance, and ethical and sustainable dietary preferences like vegan diets to get the optimum nutrition that they may miss out on.
- Products with No GMO claims often require careful ingredient sourcing, which is why the prices are usually higher.

Clean sports nutrition emphasises prioritizing diets and no artificial ingredients.



- Products that align with vegan positioning and are natural with no artificial ingredients are sought after by individuals having specific dietary preferences or allergies so that they can get the right nutrition to support their athletic performance and fitness goals.
- Consumers appreciate ‘No-GMO’ claims in sports nutrition because natural ingredients aid in maintaining health and achieving optimum performance.

Vegan diets and natural ingredients are preferred as they holistically manage weight



- Vegan diets and natural ingredients are the most popular for weight management and well-being because they have lower amounts of saturated fats, cholesterol, and artificial additives enabling them to support optimal nutrition while managing weight.
- Products with plant-based and No GMO claims are usually more expensive as manufacturing these products requires specialised processes and equipment, which can be more expensive than conventional manufacturing methods.

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Key takeaways

- Spain is set to be one of the most dynamic markets in Europe
- Less developed categories, such as vitamins, will drive growth
- E-commerce has most upside in distribution
- Tech, food and pharma players throwing their hats in the ring

Appendix

Definitions

Cross-country comparison: Category level

Category definition

Category	Definition
Sports Nutrition	Sports nutrition is targeted at serious athletes and gym-goers, and their principal purpose is to build muscle and to boost energy. Sports Nutrition tracks two types of products: Protein and Non-Protein. Sports protein include bars, powder and ready-to-drink (RTD) offerings. Sports Non-Protein include products that do not have protein as its core ingredient. They can be used to repair muscle or as energy/endurance booster. Note: Mainstream sports nutrition products such as sports drinks (e.g. Gatorade) or energy drinks (e.g. Red Bull) are not included here.
Dietary Supplements	It is the aggregation of all dietary supplements: Minerals, fish oils/omega fatty acids, garlic, ginseng, ginkgo biloba, evening primrose oil, Echinacea, St John's Wort, protein supplements, probiotic supplements, eye health supplements, co-enzyme Q10, glucosamine, combination herbal/traditional supplements, non-herbal/traditional supplements, and all other dietary supplements specific to country coverage.
Paediatric Vitamins and Dietary Supplements	All vitamin and dietary supplement products formulated, designed, marketed and labelled specifically for children.
Tonics	It includes versions of combination dietary supplements that are sold in the format of liquid concentrates, mini-drinks, shots or oral gels. Include concentrated energy shot boosters and tonics such as 5-Hour Energy and Lipovitan. Exclude remedies made with active pharmaceutical ingredients as well as super fruit juice concentrates and weight-loss beverages, tracked under the Health and Wellness (HW) system.
Vitamins	This is the aggregation of multivitamins and single vitamins.
Weight Management and Wellbeing	Weight management and well being is the aggregation of meal replacement, weight loss supplements, OTC obesity, and slimming teas. Exclude meal plans such as Weight Watchers, Jenny Craig, Nutrisystem, or Slimming World among others similar options.
Herbal/Traditional Products	Botanicals or traditional remedies are products that have a long tradition of use, decades of established reputation, and are considered alternative remedies to standard medicine. Traditional medicine remedies such as Ayurveda, Traditional Chinese Medicine (TCM), Unani, Kampo, etc. are included. Homeopathic remedies are excluded. Only packaged products are tracked.

Vitamins and dietary supplements channel definition

Channel	Definition
Grocery Retailers	Grocery Retailers are retail outlets, kiosks and market stalls that have as a primarily business to sell grocery goods for personal or household consumption. This channel category includes: • Convenience Retail • Supermarkets • Hypermarkets • Discounters • Warehouse Clubs • Food/Drink/Tobacco Specialists • Small Local Grocers
Health and Beauty Specialists	Health and Beauty Specialists includes four channel categories: Beauty Specialist Retailers, Pharmacies, Optical Goods Stores and Health and Personal Care Stores.
Direct Selling	Direct selling is the marketing of consumer goods directly to consumers, generally in their homes or the homes of others, at their workplace and other places away from permanent retail locations. Goods are delivered directly to the customer. ***Internet sales from direct selling companies are included in this size.*** We are primarily concerned with tracking the importance of this model and not where the sale is made, so all sales that are attributable to a direct selling company will fall under their share in direct selling. This goes for orders that are placed online as well. There should not be separate shares for direct sellers in any other channel. Example Direct selling brands include: • Avon • Amway (Alticor) • Herbalife • Tupperware • Oriflame • Vorwerk

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Vitamins and dietary supplements channel definition

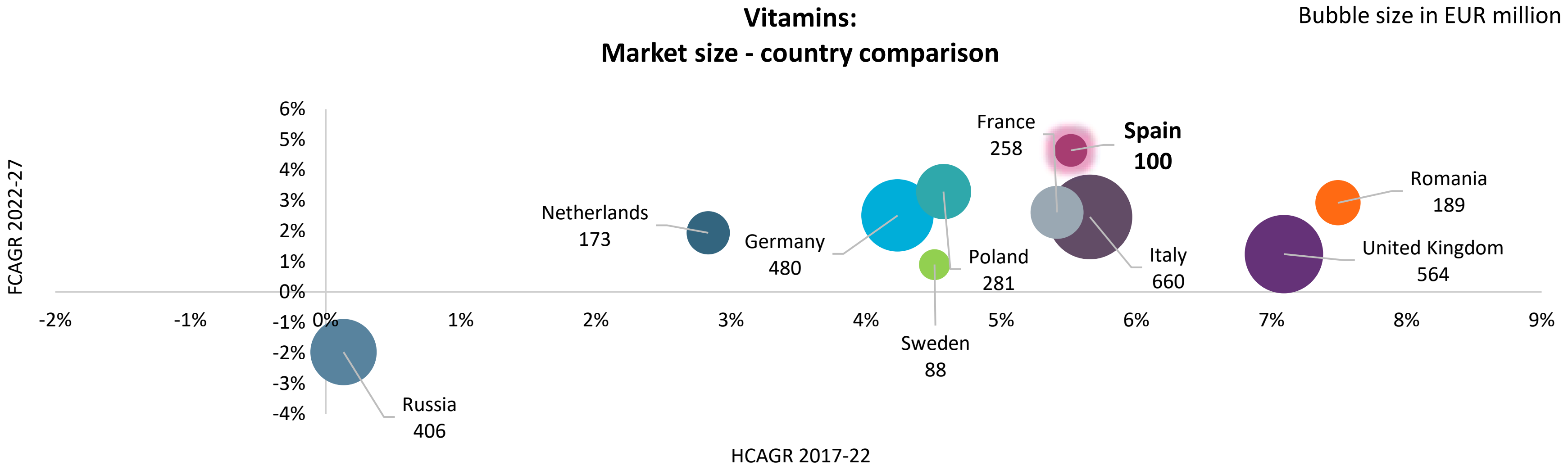
Channel	Definition
Retail E-Commerce	E-Commerce is the sale of consumer goods to the general public via the internet. Consumers purchase goods online through the web platform. Sales data is attributed to the country where the consumer is based, rather than where the retailer is based. Our definition of e-commerce is agnostic as to where the actual payment takes place. If an order is initiated online, we would consider that order to be an e-commerce transaction, even if the order is ultimately paid for in-store (or elsewhere). E-Commerce transactions involve consumers ordering goods online whereby: • The order is placed and payment is made via the internet prior to delivery • The order is placed via the internet and payment is made through a store card or an online credit account subsequent to delivery. This payment may be by any mode of payment including postal cheque, direct debit, standing order or other banking tools. • The order is placed via the internet and payment is made on receipt of the goods when they are delivered to the consumers' door (cash on delivery) • The order is placed via the internet and payment is made via an ATM machine in a bank E-Commerce also includes omnichannel transactions: • 'Click-and-collect' and/or 'collect at store' options, where the order is made via the internet and the goods are collected by the customer from a store. Please note that we are agnostic as to where actual payment takes place. Example E-Commerce brands include: • Amazon.com • Americanas • Apple.com

Appendix

Definitions

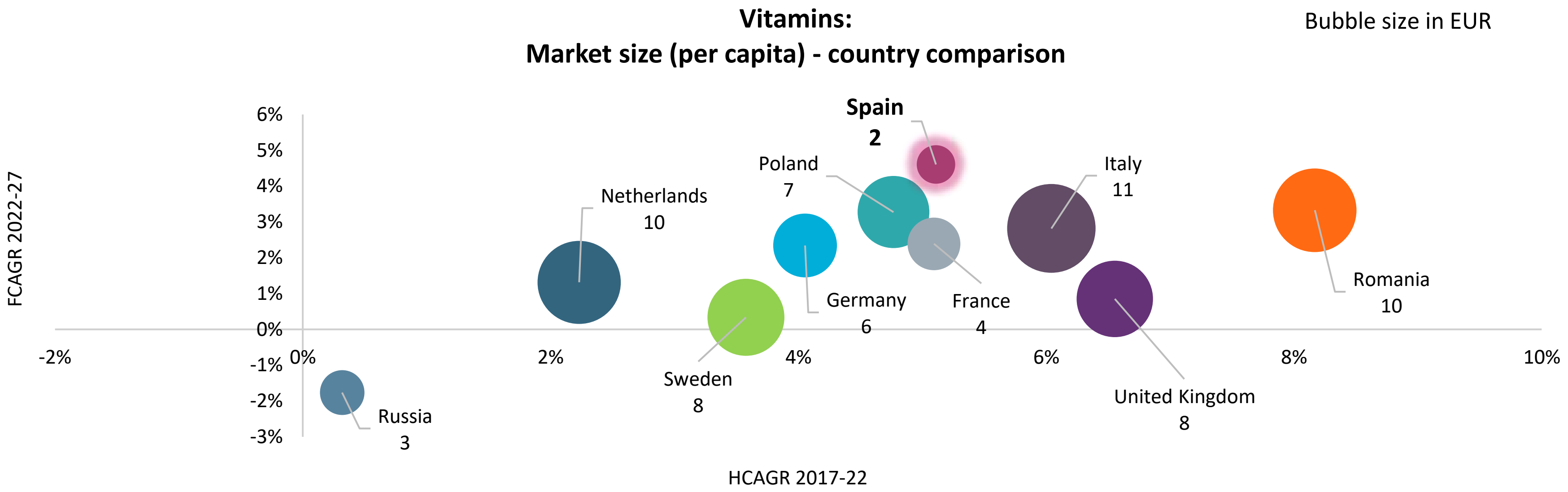
Cross-country comparison: Category level

Market size was boosted by the need to improve immunity post the pandemic



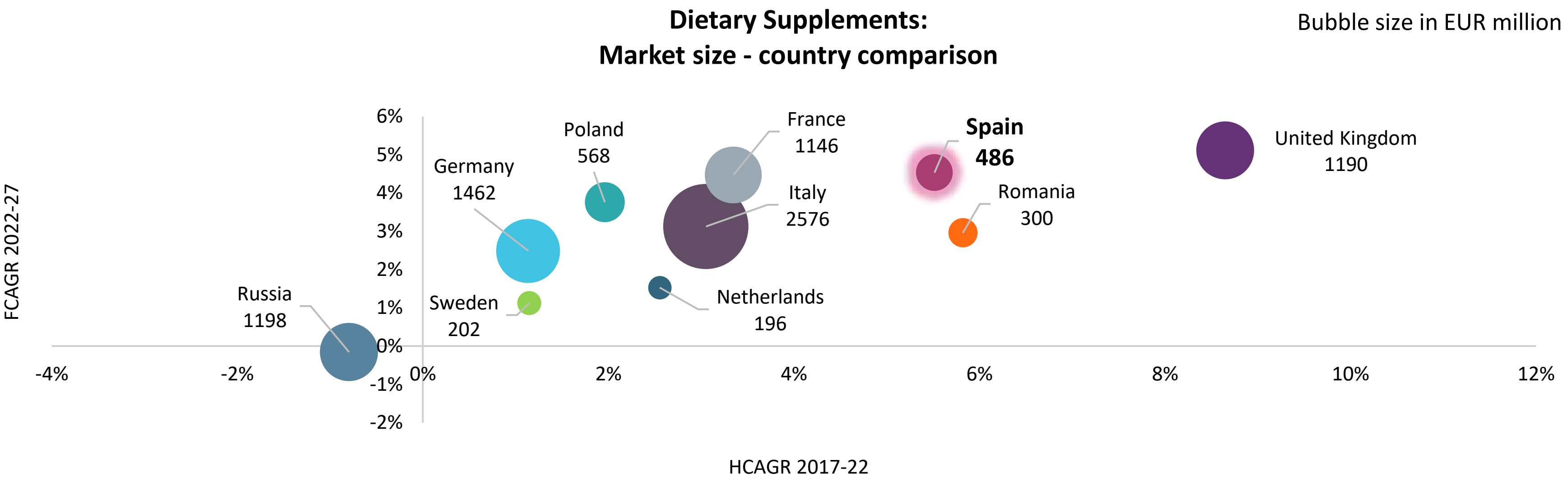
- As most consumers continued to prioritize improving their immune systems post the pandemic, vitamins were the most efficient way to do so, thereby ensuring a significant market size in these countries. Additionally, the launch of specific formulations further reinforced its relevance.
- Market size in Romania is influenced by the continuation of habits like consuming vitamins regularly, which was developed during the pandemic, as well as by brands launching new products to capitalize on the growing health awareness wave in the country.

Increased visibility and awareness were key to the increased consumption rate



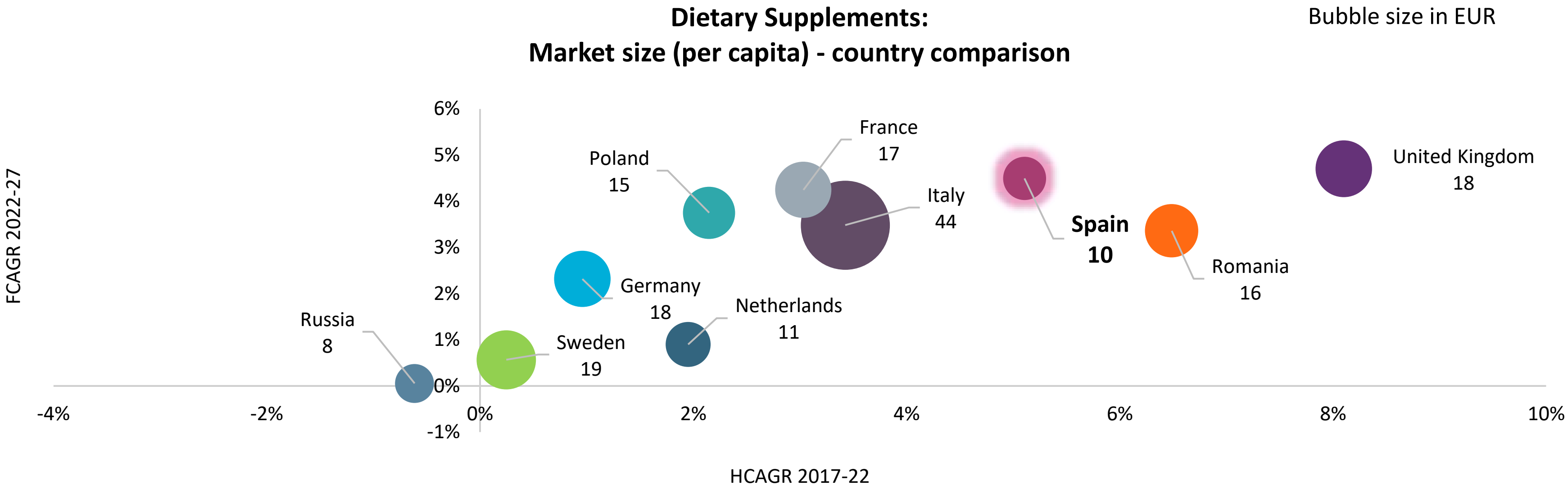
- An increase in the recommended dose of vitamins by the Chief Sanitary Inspectorate and the prominence of vitamins to treat “long Covid” ensured that the consumption rate was stable in Poland.
- Vitamin D's OTC status and the growing appeal of vitamins in the form of gummies fuelled consumer demand, resulting in a surge in vitamin consumption in France.

Maintaining a fit body and mind positively influences the market size



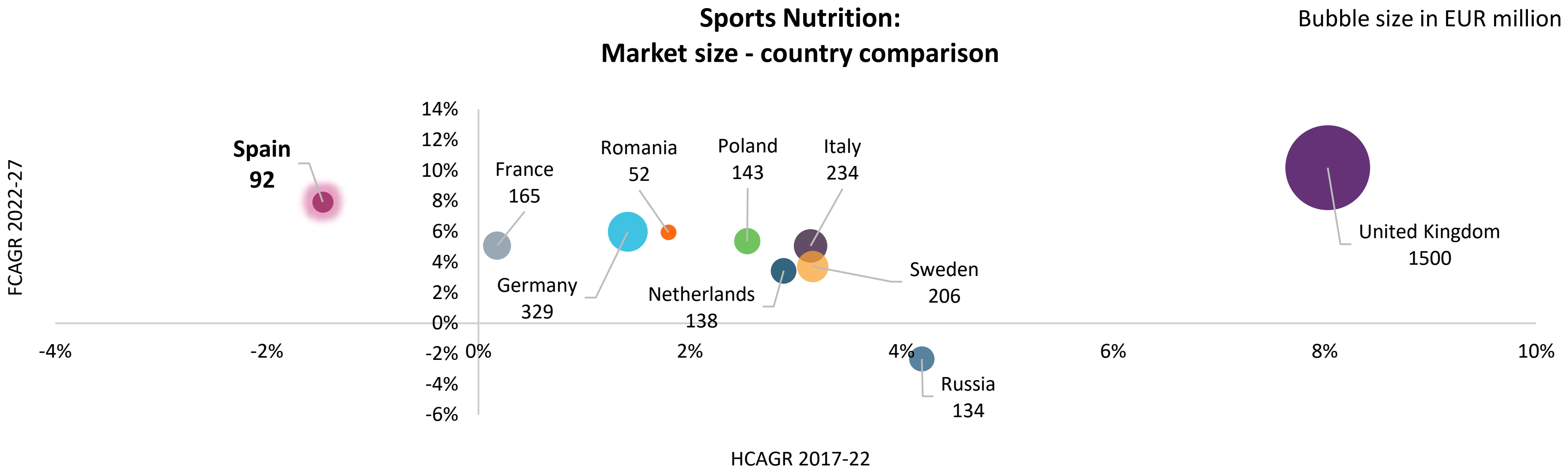
- The health and wellness trends post the pandemic, along with the need to address nutrition gaps for consumers with specific dietary preferences, restrictions or allergies, have positively impacted the market size.
- In Romania, the market size experienced a positive impact as consumers continued to maintain the habits they developed during the pandemic, including prioritising their health and taking preventive measures against illnesses, even in 2022.

Product development and knowledge impact consumption positively



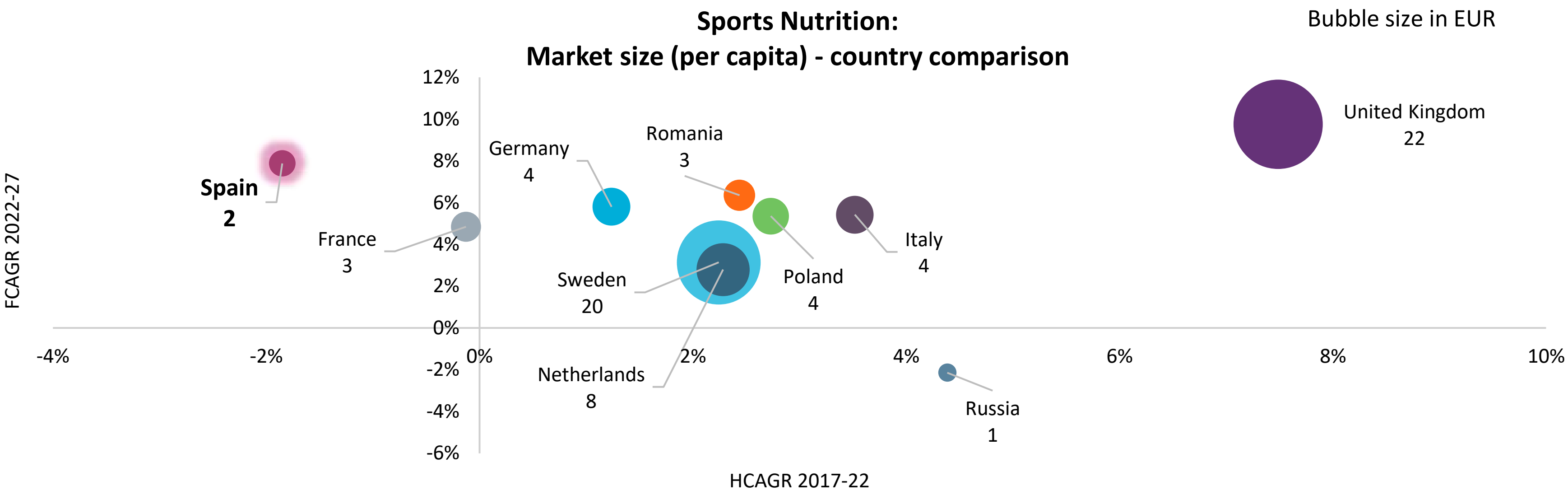
- Consumer preference for convenient combinations of dietary supplements for various needs like bone, joint, and eye health especially for the older population has driven consumption in these countries.
- The consumption of dietary supplements in France is driven by the perception of them as an effective preventive medicine and their availability in convenient formats like gummies, which has created a lasting impression since 2020.

Growing interest in fitness expands market size beyond athletes and enthusiasts



- The diversification of the consumer base for sports nutrition products, driven by the increased participation of non-athletes in sports to maintain health, along with the reopening of sports facilities post the pandemic, allowed France to have a stable market size.
- The combination of the reopening of gyms and sports facilities in Poland along with the increase in the willingness of the younger population to actively exercise in 2022 has ensured stability in the market size.

Diversification of products to include mass-market positively impacts consumption

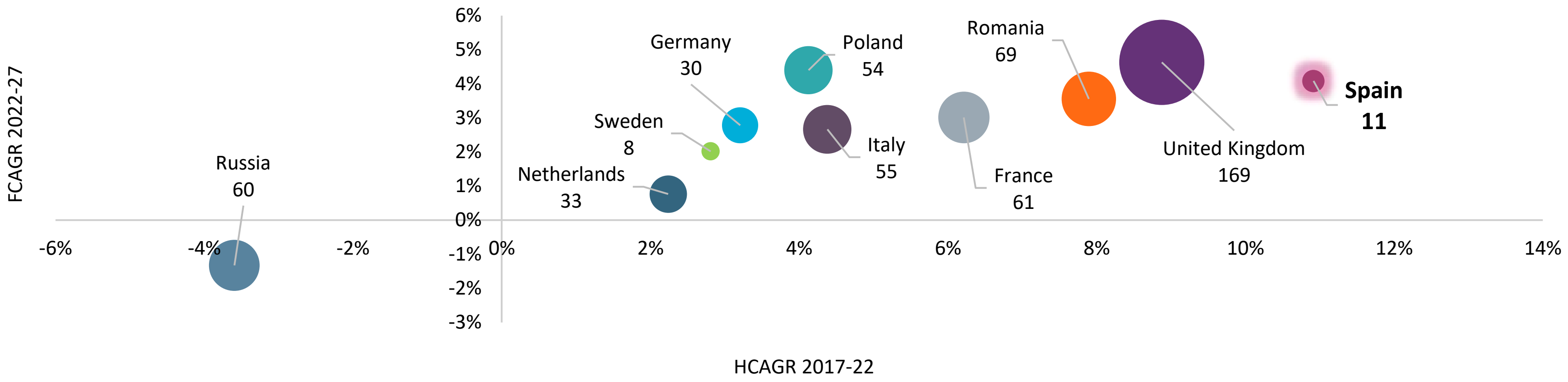


- Despite rising interest in sports nutrition products in France and the increased growth they saw in 2022, their consumption remains limited in the country as the category is "unfamiliar" to most French consumers, who remain suspicious about the composition of these products.
- In countries such as Poland, Italy, Netherlands, and Sweden, the demand for sports nutrition products has grown as an increasing number of consumers choose products that support their health regime.

Parents are preferring vitamins that aid immunity and gut health, post pandemic

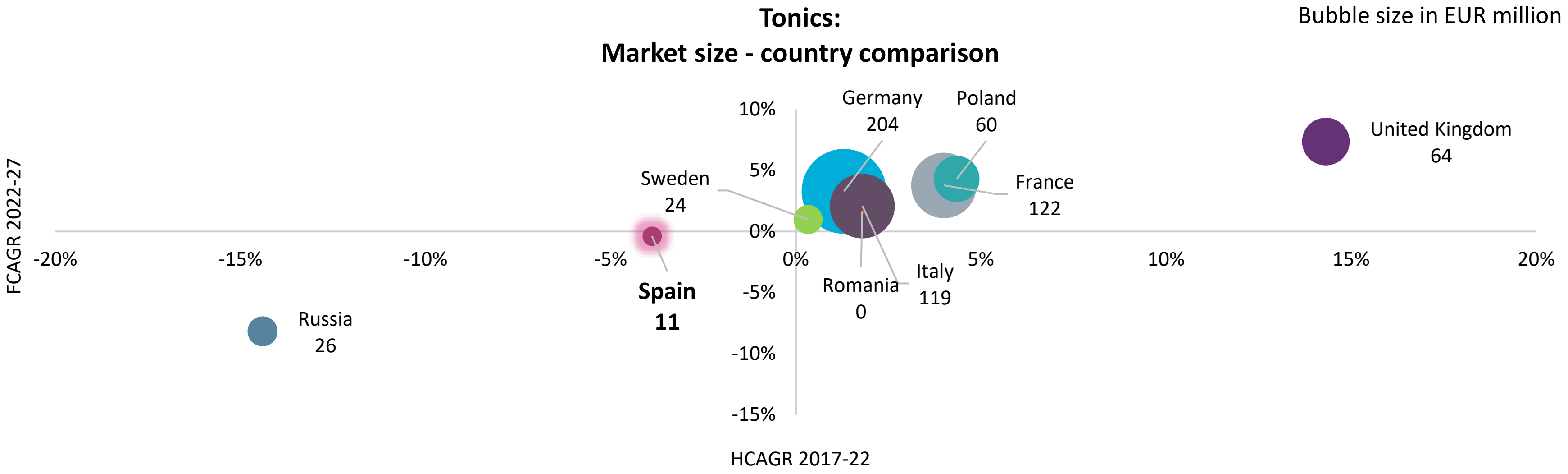
Paediatric Vitamins and Dietary Supplements: Market size - country comparison

Bubble size in EUR million



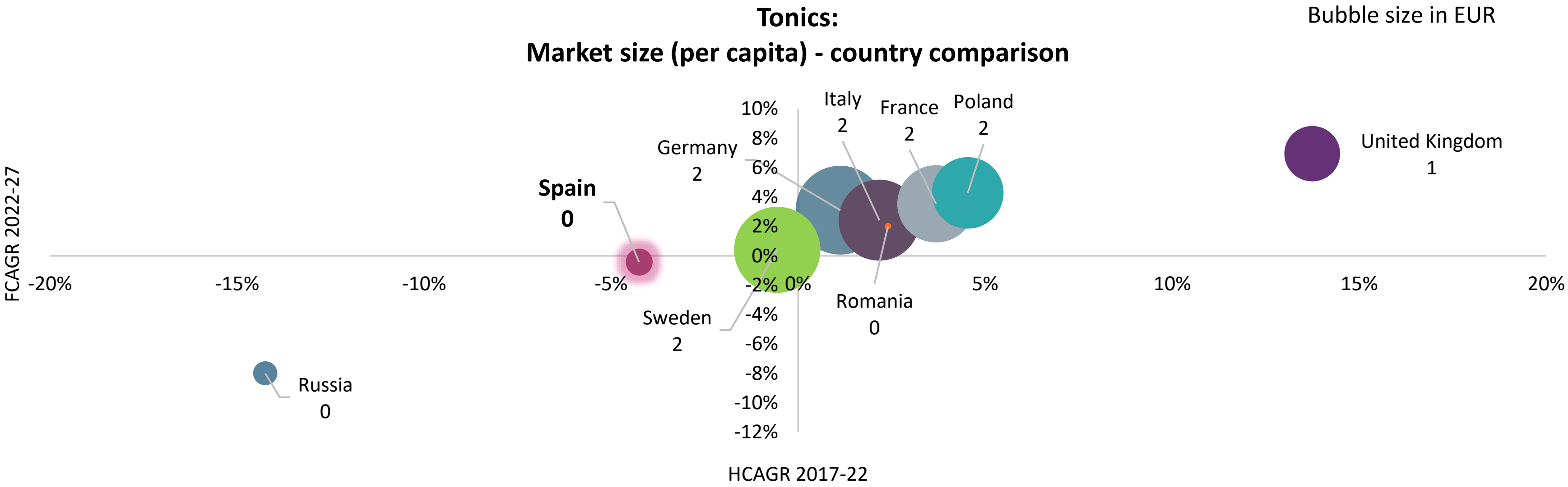
- Demand for paediatric vitamins and supplements is driven by the increasing attention being paid to paediatric health and consistent consumer education, along with parents who are looking for solutions that support their children's immune health.
- Post-pandemic, parents have become more vigilant about their children's health, particularly in terms of immune health and gut health. This has led to a prioritisation of vitamins and supplements that specifically support immune function and promote healthy gut microbiota in children.

Energy-boosting products and health awareness positively impacts demand



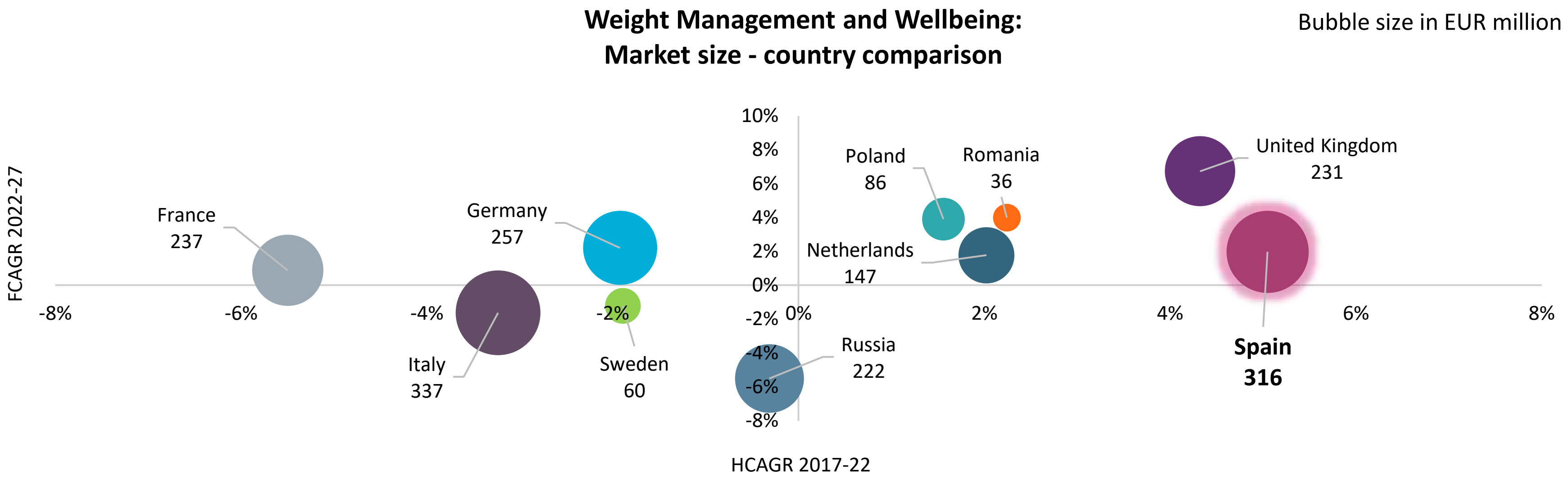
- The United Kingdom has a well-established market size for dietary supplements and functional foods as consumers are increasingly adopting healthier lifestyles, focusing on fitness, and seeking products that enhance their energy levels and vitality.
- The pandemic had a significant impact on Polish consumers' health awareness and concerns. As a result, there was an increased demand for tonics that claimed to support immunity, boost energy, or provide other health benefits, thus keeping the market size stable.

Wider consumer base and convenience drive consumption rate across markets



- On-the-go solutions like liquid concentrates, mini-drinks and oral gels align with the fast-paced lifestyles of UK consumers. Products like 5-Hour Energy are positioned as quick pick-me-ups to combat fatigue and enhance focus, enabling a stable consumption rate.
- The consumer base for tonics has broadened from athletes to sports enthusiasts, the ageing population and women in general as they are looking for convenient options to supplement their nutrition thus increasing the consumption rate in Poland.

Focus on maintaining weight and lack of brand loyalty divides the market size

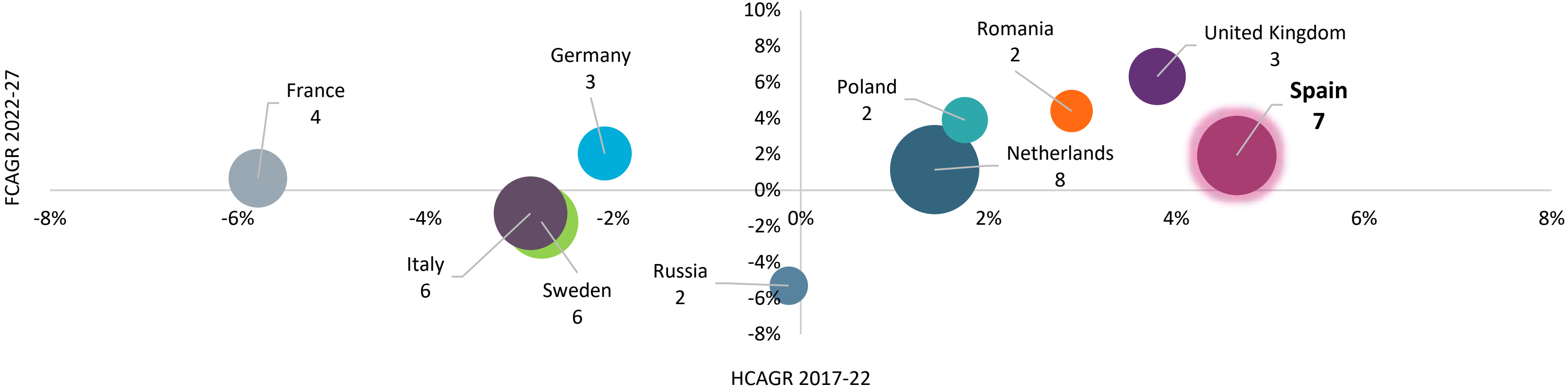


- The increased awareness of maintaining a fit body and a healthy lifestyle, coupled with the availability of affordable alternatives to full meals like specially curated meal replacement products, has helped keep the market size stable.
- The market size for weight management and wellbeing products in Poland is driven by the need to tackle the significant increase in obesity, as well as the rising consumer awareness to re-evaluate their health and maintain a healthy weight.

Active lifestyles drive consumption while waning interest in weight loss dampens it

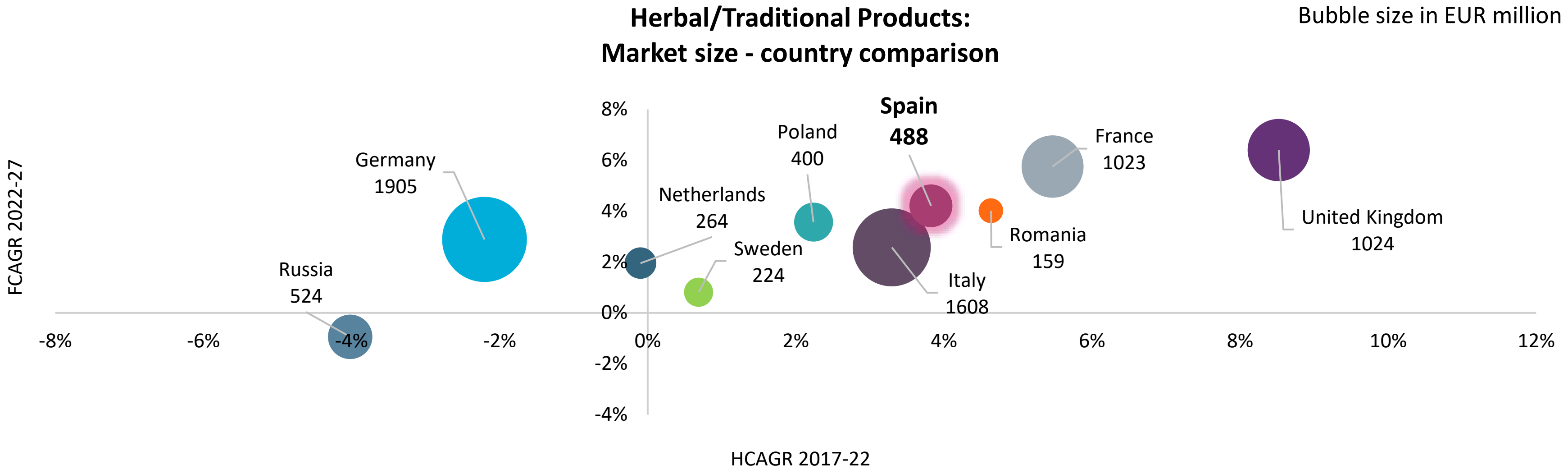
Weight Management and Wellbeing: Market size (per capita) - country comparison

Bubble size in EUR



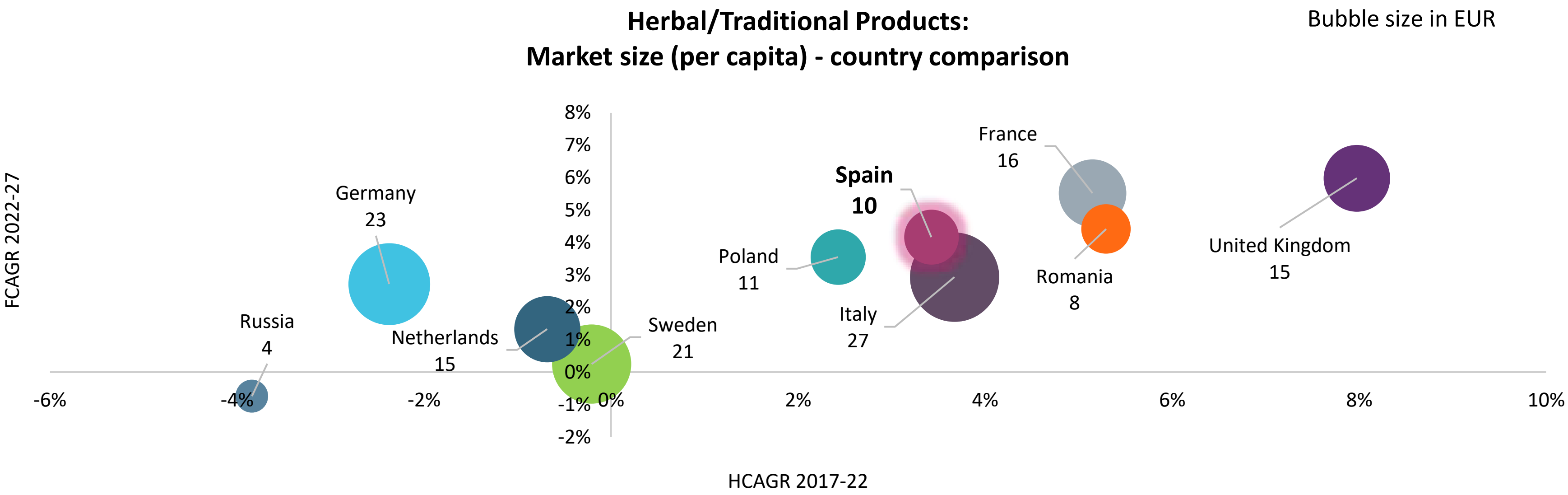
- Healthy eating and an active lifestyle to remain fit have led consumers to use weight management and wellbeing products regularly, thereby ensuring a stable consumption rate in most countries.
- Poles are appreciating the hybrid formulations of weight loss aids and supplements that are being introduced in the market, which claim to aid multiple functions such as digestion and regulation of stomach function, thereby driving consumption.

Preference for herbal components in consumer health products drives demand



- Most consumers prefer herbal/traditional products as they believe them to be safer and more effective to use. Post the pandemic, these products became more popular due to their perceived effectiveness as preventive medicinal products.
- The increasing interest of French consumers in organic, plant, and CBD-based products has contributed to the development of an evolving regulatory framework, which is one of the key factors driving the market size growth in France.

The perception of natural ingredients as healthier, has driven consumption



- Post the pandemic, people have started favouring the inclusion of herbal/traditional ingredients in products as they perceive it to be cleaner, more sustainable, and most importantly healthier than their chemical counterparts, thus increasing the consumption rate.
- The increased preference of consumers for self-medicating with herbal products during the pandemic, including plant-based over-the-counter (OTC) products and herbal sleep aids, has boosted consumption in France.

Thank you

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