

# FOOD SUPPLEMENTS IN CENTRAL AND EASTERN EUROPEAN COUNTRIES

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**Summary.** The consumption of food supplements, functional foods and beverages is constantly increasing. The increase of the different segments of the market varies from 5 to 15%. Worldwide, the most dynamic food supplement markets are the ones in United States, European Union (EU), China, India and Japan. In recent years, the economics of Central and Eastern European countries (Russia, Poland, Ukraine, Bulgaria, Romania, Czech Republic, Slovakia, Slovenia and Croatia) have shown significant development which also reflects the food supplement market. The article outlines the main tendencies in the development of food supplement markets in Central and Eastern European countries as one of the most dynamic segments of the EU food supplements market. Market drivers, business trends in the industry and market prospects are discussed. The food supplement market in Eastern European countries is dominated by the multivitamin market and mineral supplement. Other food supplements with significant consumption are various combination products, vitamin C, vitamin B, tonics and child-specific preparations. Plant-based food supplement are less used. The common interest for development of regulated and stable markets of food supplements with the efforts of regulators, manufacturers, distributors, medical specialists and consumers would further develop food supplements markets for the benefit of the consumers. Consumer and medical specialists' education is needed in order to balance the safety of food supplements with the free market concept.

**Key words:** *food supplement, dietary supplement, vitamins, market, Eastern Europe, Bulgaria*

## INTRODUCTION

From Europe to Latin America the consumption of food supplements, functional foods and beverages is constantly increasing. The increase of the different segments of the market varies from 5 to 15%. Worldwide, the most dynamic food supplements markets are the ones in United States, European Union (EU), China, India and Japan [9].

In recent years, the economics of Central and Eastern European countries (Russia, Poland, Ukraine, Bulgaria, Romania, Czech Republic, Slovakia, Slovenia and Croatia) have shown significant development. The economical situation, increasing incomes and the change in life style and taking a bigger responsibility for own health resulted in increase of food supplements and over-the-counter medicinal product sales [10].

In general, in the studied countries the over-the-counter medicinal products are distributed via pharmacies only. In Hungary approximately 390 OTC medicinal products are sold in regular shops as well. Food supplements are sold not only in pharmacies but also via Internet, through multilevel marketing companies and direct marketing. At the same time, many pharmaceutical companies started to produce and market food supplements [10]. According to many specialists, the potential of food supplements market is similar to the one of pharmaceutical products. One of the best sold food supplements worldwide are chondroprotectors, cardioprotectors, probiotics, vitamins and minerals, some herbal food supplements (ginseng, ginkgo biloba, green tea etc.) etc. [9, 10].

## **AIM**

The aim of the current article is to outline the main tendencies in the development of food supplements markets in Central and Eastern European countries as one of the most dynamic segments of the EU food supplements market.

## **MATERIALS AND METHODS**

Sources of information for this article were publications on food supplements; sales reports, published by marketing companies; publications on food supplements found in Scopus database and product brochures and catalogues.

## **RESULTS**

In general, the experts consider that the liberal legislation on food supplements (compared with over-the-counter (OTC) pharmaceuticals) leads to fast market growth and more often pharmaceutical companies switch to development and production of food supplements product lines [3]. The main food supplements market drivers are the legislation (liberal legislation increases the market size), aging, media publicity [5], dissatisfaction with western healthcare [1, 11] and the increasing knowledge about diet-disease relationship. People in the developed countries are informed about alternatives to synthetic medications and seek an alternative. Rising healthcare costs also stimulates the process of consumption of food supplements.

Eastern Europe has the second highest share of population which is over 60 years of age (after Western Europe). People in Europe live longer and pay more and more attention to the quality of their life.

Worldwide, according to the Euromonitor International [8] food supplements market is very dynamic, but still below pharmaceutical market by volume and value (Figure 1). As shown on the Figure 1, both OTC segment and food supplements segment show a positive trend [8].

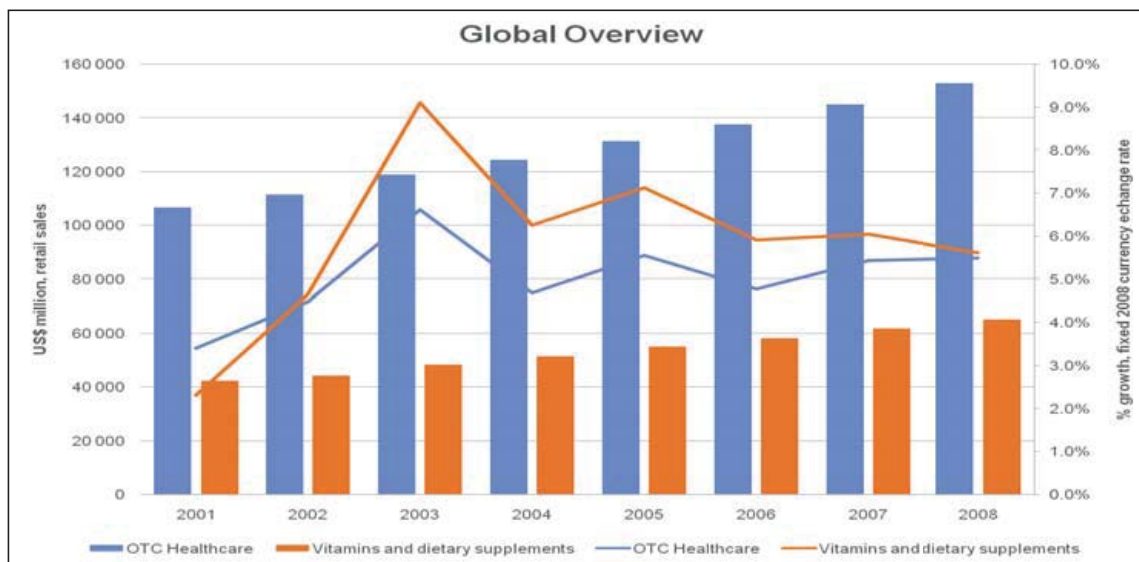


Fig. 1. Global overview of food supplements and OTC market

The good performance of vitamins and food supplements can be seen as a result of the drivers affecting the industry. These drivers can be grouped in 3 categories: regulation [6], product innovations [6-8] and consumer knowledge and needs [4, 12]. Overall regulation is probably the most impactful of all factors. In order to protect consumers, different regulations are often put in place. These can vary from market to market. Overall vitamins and food supplements benefit from a less strict regulation in comparison to OTC medicinal products. Regulation generally affects which products can be sold on the market and how products can be sold, governing the product advertising, packaging and distribution. Figure 2 presents the distribution channels for food supplements [8].

Supply drivers are very important and they are determined by the legislation [9]. These factors are controlled by the manufacturers. Product innovation is key as consumers taste and preferences can change very quickly in this market. Fashionable products can appear very quickly following a positive review published in the press. One such example is resveratrol grape extract following studies showing this ingredient benefit on extending life of mice. Similarly quickly products can disappear from the market – for example sales of Vitamin E were impacted by negative studies published in the media. Generics are mainly a case for single vitamins, as consumers are more comfortable comparing those [8].

On the other hand, market restraints are exaggerated health claims, lack of consumers' knowledge on food supplements, limited brand loyalty etc. [2] .



Fig. 2. Distribution channels for OTC and food supplements (VDS)

The differences in legislative regimens of the two types of markets (OTC pharmaceutical products and food supplements) influence their distribution. Vitamins distributed as OTC pharmaceuticals have limited distribution channels mainly through pharmacies. Vitamins offered as food supplements are also supplied via pharmacies mainly but have more distribution channels which reflect the consumption. The main market drivers are product innovations, multilevel marketing and consumer education.

The development of the food supplements market in Eastern Europe is dominated by the dynamic markets of Lithuania, Hungary, Czech Republic, Estonia and Latvia. These are the leading countries within the Eastern Europe in terms of spenders in food supplements per capita. Fastest growing markets within the studied region are Russia and Ukraine, while in Southeastern Europe the biggest markets are Romania, Bulgaria and Croatia (Figure 3) [8].

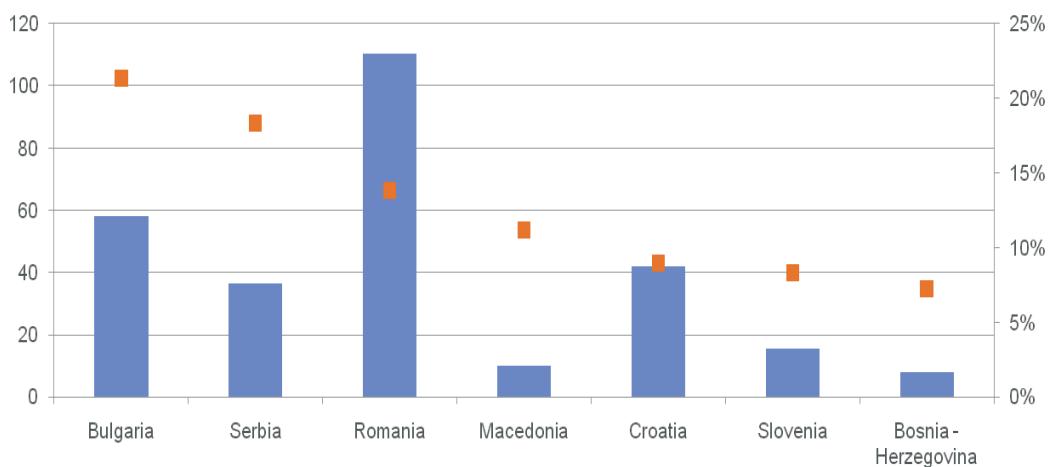


Fig. 3. Food supplements markets in Southeast Europe

The biggest sales in Eastern Europe recorded multivitamin food supplements, followed by combinations, minerals, probiotic supplements, calcium supplements, child-specific vitamins and minerals (Figure 4) [8].

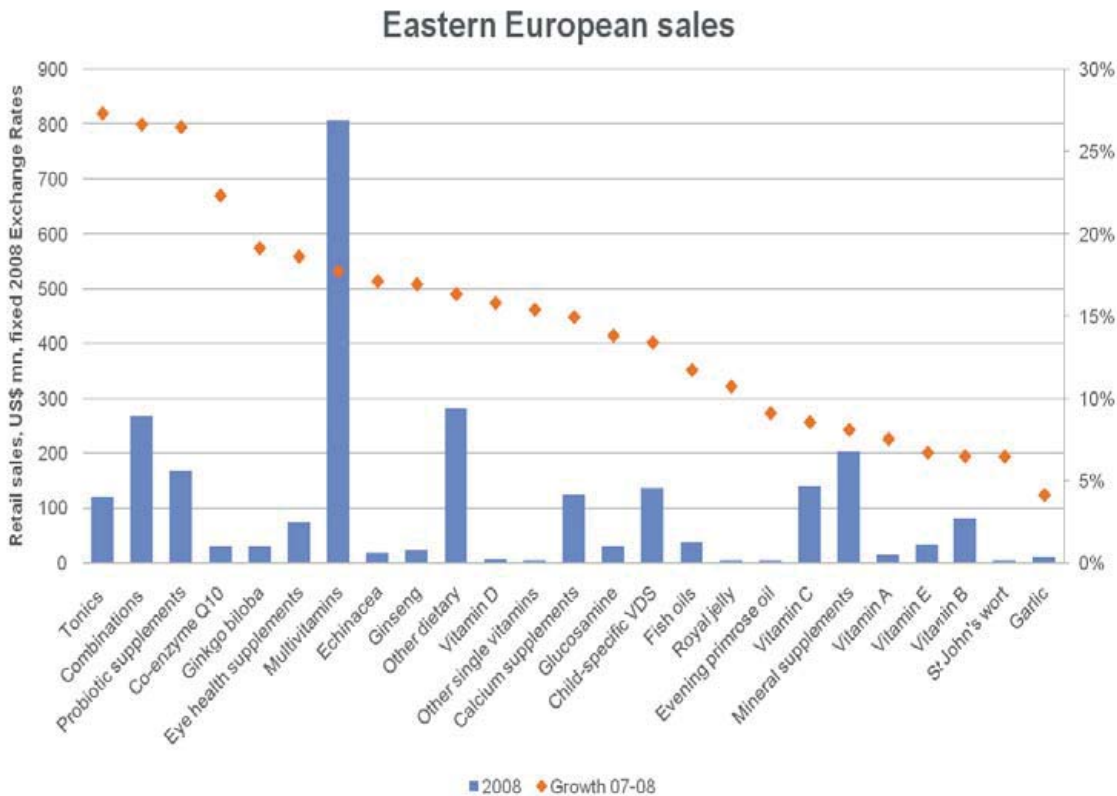


Fig. 4. Eastern European sales

In the studied countries, the share of multivitamins is dominating (Fig. 5), and is most significant in Romania and Bulgaria. Of monopreparations most sold in Bulgaria are vitamin B, vitamin C and vitamin A. Only in Macedonia and Croatia, vitamin D is amongst the best sold food supplements. Vitamin A is best sold in Slovakia, and vitamin E – in Macedonia, Slovenia, Bosna and Herzegovina. Vitamin C is the most popular monocomponent vitamin, a fact that could be explained with the existence of both food supplements and OTC drug forms.[8]

13% of the sales of food supplements in Bulgaria are due to beauty and wellness products (estimated as 3% for Romania and 10% for Hungary). Within this group, most popular are suntan products such as beta-carotene, vitamin E, vitamin C, zinc, selenium, fatty acids, hair-loss products etc. The market specialists foresee significant growth in multivitamins, tonics, probiotics, eye health products, fish oil, coenzyme Q10 [8].

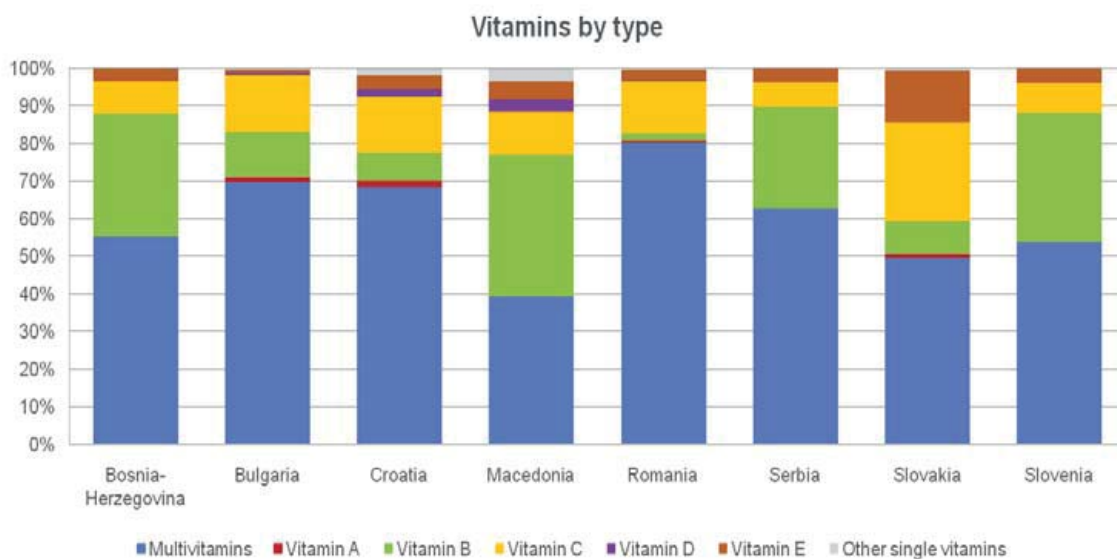


Fig. 5. Sales of vitamins by type

## DISCUSSION

The food supplements market in Eastern European countries is dominated by the market of multivitamins and mineral supplements. Other food supplements with significant consumption are various combination products, vitamin C, vitamin B, tonics and child-specific preparations. Plant-based food supplements are less used.

Currently, there is no knowledge on inclusion of food supplements in different prophylaxis programs. There is necessity of independent monitoring by non-governmental associations and consumer associations on the quality of distributed food supplements and correctness of the health claims and promotions. Thus one of the factors which hinder the development of food supplements market is the reluctance of significant part of medical specialists to include the alternative in their advice to patients. The exaggerated health claims on the packages of many food supplements on the other hand make the consumers suspicious to these products.

There should be a common interest for development of regulated and stable markets of food supplements with the efforts of regulators, manufacturers, distributors, medical specialists and consumers.

Consumer and medical specialists' education is therefore to play even a bigger role for the development of food supplements market in the future balancing the safety of food supplements with the free market concept.

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