



Decoding Belgium's Food Supplements Market: Data, Consumers and Trends



Agenda

-  What is be-sup?
-  What are food supplements?
-  The Belgian Market in Context
-  Market and consumer data
-  Advice, Purchasing and Distribution Channels
-  Societal and Consumer trends
-  Innovation trends and market outlook

BE-SUP: LEADING BELGIAN TRADE ASSOCIATION



OFFICIAL BELGIAN TRADE ASSOCIATION

Be-sup, recognized by the Council of State since 1990, represents the Belgian food supplements industry, providing expertise, regulatory support, and networking.



> 160 MEMBERS: VERTICAL INTEGRATION

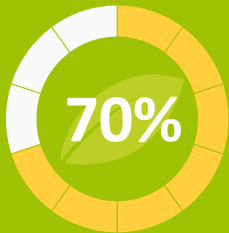
Be-sup unites >160 members, from SMEs to global players, covering the entire industry chain through strong vertical integration.



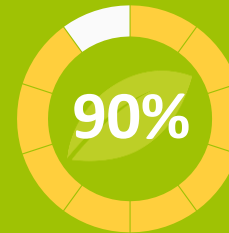
CONNECTED TO LEADING ASSOCIATIONS

Be-sup is a member of Fevia and EHPM, ensuring industry representation and shaping of the sector at both the national and the European level.

BE-SUP'S REPRESENTATIVITY



Be-sup members:
70% Market Share



Be-sup members:
90% Production Share

BE-SUP'S MISSION



#WATCHDOG

Defending the image & credibility of food supplements and the food supplements industry



#FOODSUPVOCATE

Creating the best possible framework for our members to do business: advocacy, lobby



#SUPACADEMY

Empowering our members with unique food supplement knowledge: advice, workshops, conferences, #FFS congress,...

MEMBER-DRIVEN COLLABORATION

Be-sup unites industry leaders to tackle key challenges in regulation, quality, probiotics, and communication. Through dedicated working groups, we ensure innovation, compliance, and a strong sector, both in Belgium and internationally.





What are food supplements?

DEFINITION

Directive 2002/46/EC, Article 2

1. Foodstuffs to **supplement the normal diet**
2. A **concentrated source** of nutrients or other substances with a nutritional or physiological effect
3. Marketed in **pre-dosed form**: capsules, tablets, sachets of powder, ampoules, dropper vials...

Vitamins & minerals

Botanicals

Probiotics

Omega-3 fatty acids

- ✗ No medicines
- ✗ Not intended to cure or treat
- ✓ A place in integrative and preventive healthcare

GALENIC FORMS



Drops



Gummies



Effervescent



Powder sachets



Capsules & softgels



Tablets

In Belgium, capsules and tablets still account for more than 80% of sales in most categories.

Sources: Directive 2002/46/EC. Grand View Research, Dietary Supplements Market report, June 2026 (market size and revenue share by form). Used by: NBJ Delivery Format Report 2023. Preferred by: Nutraceuticals World US consumer survey, 2026. Belgium: IQVIA / be-sup Association, MAT 07/2026.



A strict regulatory framework

Compliance with Belgian and EU legislation



1

PRE-MARKET
Control by FPS Health

Compulsory notification before marketing

Control of:

- Composition
- Compliance with BE and EU legislation

For example:

- Maximum level nutrients?
RD 30/05/2021
- Authorised botanicals?
RD 31/08/2021
- Compliance of the packaging and labelling?
FIC Regulation (EU) 1169/2011



2

POST-MARKET
Controls by FAVV / AFSCA

Control of the product

- Composition
- Contaminants, pesticides...
- Claims legislation

Control of the producers

- General Food Law
- Autocontrol system, HACCP, GHP, GMP...

Control of advertising, websites...



3

ADVERSE EVENTS
Nutravigilance scheme

Declaration of adverse events

- Collects and assesses reports of suspected adverse effects linked to certain foods.
- Covers food supplements, fortified foods, foods for specific groups and novel foods.
- Any suspected adverse effect can be reported, whatever its type or severity.
- Consumers, health professionals and food businesses can report; reporting is mandatory for businesses.
- Expert assessment helps detect new risks and guide measures to protect consumers.



Are food supplements useful?



IT STARTS WITH THE PLATE

7%

of adults eat the recommended 300 g of vegetables a day

10%

reach the fruit recommendation of 250 g a day

11%

reach the dairy recommendation

1%

eat enough wholegrain products

BELOW THE REQUIREMENT, FROM FOOD ALONE

Nutrient	Below requirement	Most affected group
Folate (vitamin B9)	70%	women 77%
Calcium	67%	adolescents 86%
Riboflavin (vitamin B2)	63%	women 75%
Vitamin C	61%	lower-educated 68%
Vitamin B6	38%	women 45%
Vitamin A	30%	adolescents 38%
Iron	21%	adolescent girls 43%
Vitamin B1	0.4%	adequate for almost everyone

"At risk" means intake from food below the requirement: an estimated risk of inadequacy, not a clinically measured deficiency.

Source: Sciensano, National Food Consumption Survey 2022-2023 (published June 2025).



Vitamin D stands out



VITAMIN D

- 🌿 **More than 95%** of Belgians fall below the recommendation of 15 µg a day.
- 🌿 **Around 45%** of adults have deficient blood levels (25(OH)D below 50 nmol/L)
- 🌿 **Between 40% and 100% of older adults** have deficient levels of vitamin D
- 🌿 **Confirmed by blood analysis**

Sources: Moyersoen et al., Nutrients 2017; Sciensano, National Food Consumption Survey 2022-2023; Hoge et al., Nutr Res 2015.



The Market

 No NACE-codes for food supplements

 Sources:



CIBH
Community
of Intersectoral
Belgian Healthcare

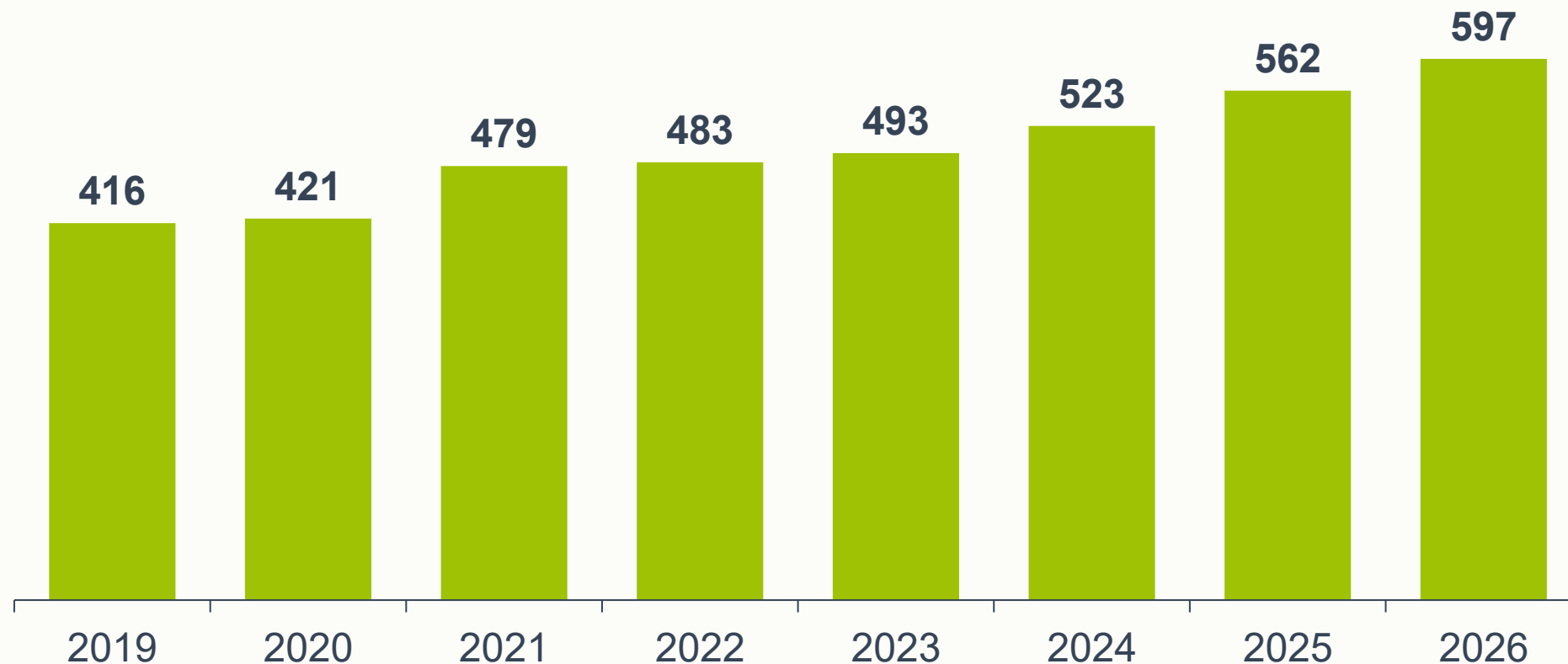


GERSDATA
Benelux



Turnover in M€ in Belgium

Pharmacy, para-pharmacy and online channels, values in public price (MAT June of each year)



Source: IQVIA / be-sup Association, values in public price. 2019 to 2026 as reported in the annual IQVIA presentations to be-sup; 2026 = MAT 06/2026 (IQVIA, be-sup ASM, 17/09/2026). Year-on-year growth on IQVIA's current panel: +0.7%.

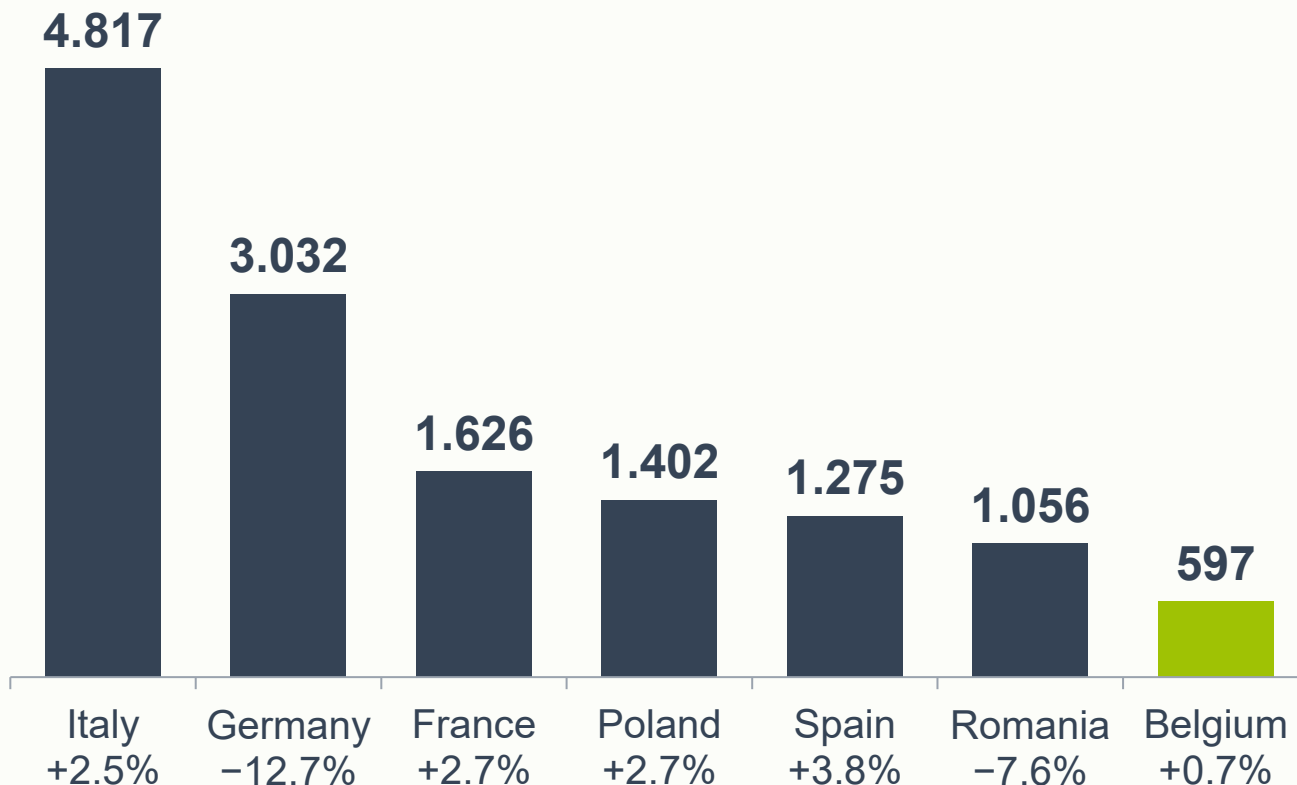




The European food supplements market

Sales value at public price, MAT June 2026 (July 2025 to June 2026), with growth versus MAT June 2025

€ million

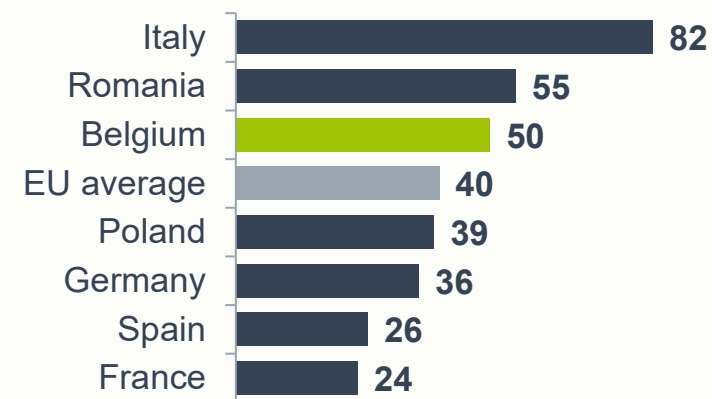


EU total (24 member states)

€17.2 billion

-0.7% versus previous year

Spend per capita (€)



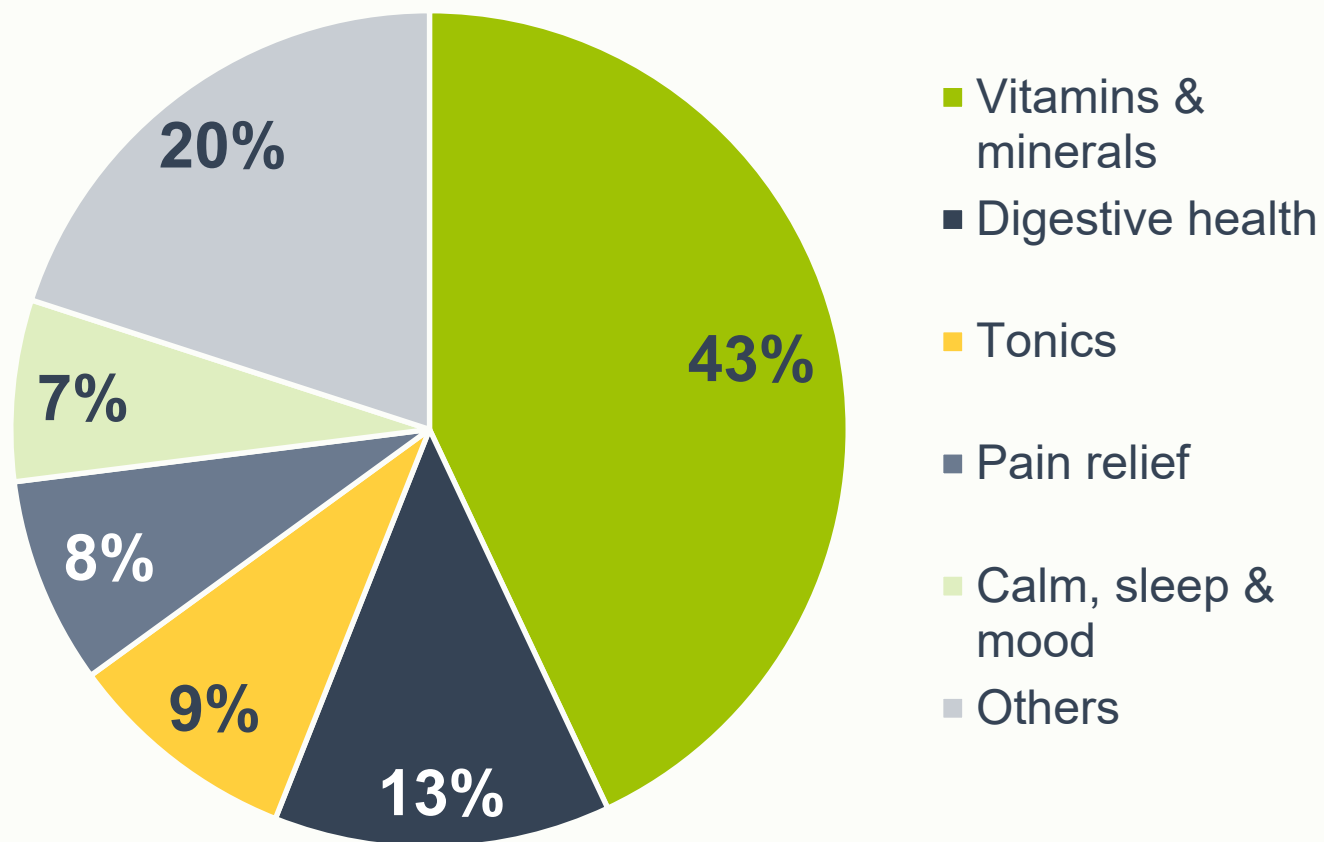
Source: IQVIA Global OTC Insights (Europe) and IQVIA CH Data (Belgium) / be-sup Association, public price, MAT June 2025 and MAT June 2026. Presented at the be-sup ASM 17/09/2026.

IQVIA



Best-selling food supplement categories in Flanders

Share of food supplement sales in Flemish pharmacies, public price, MAT July 2026



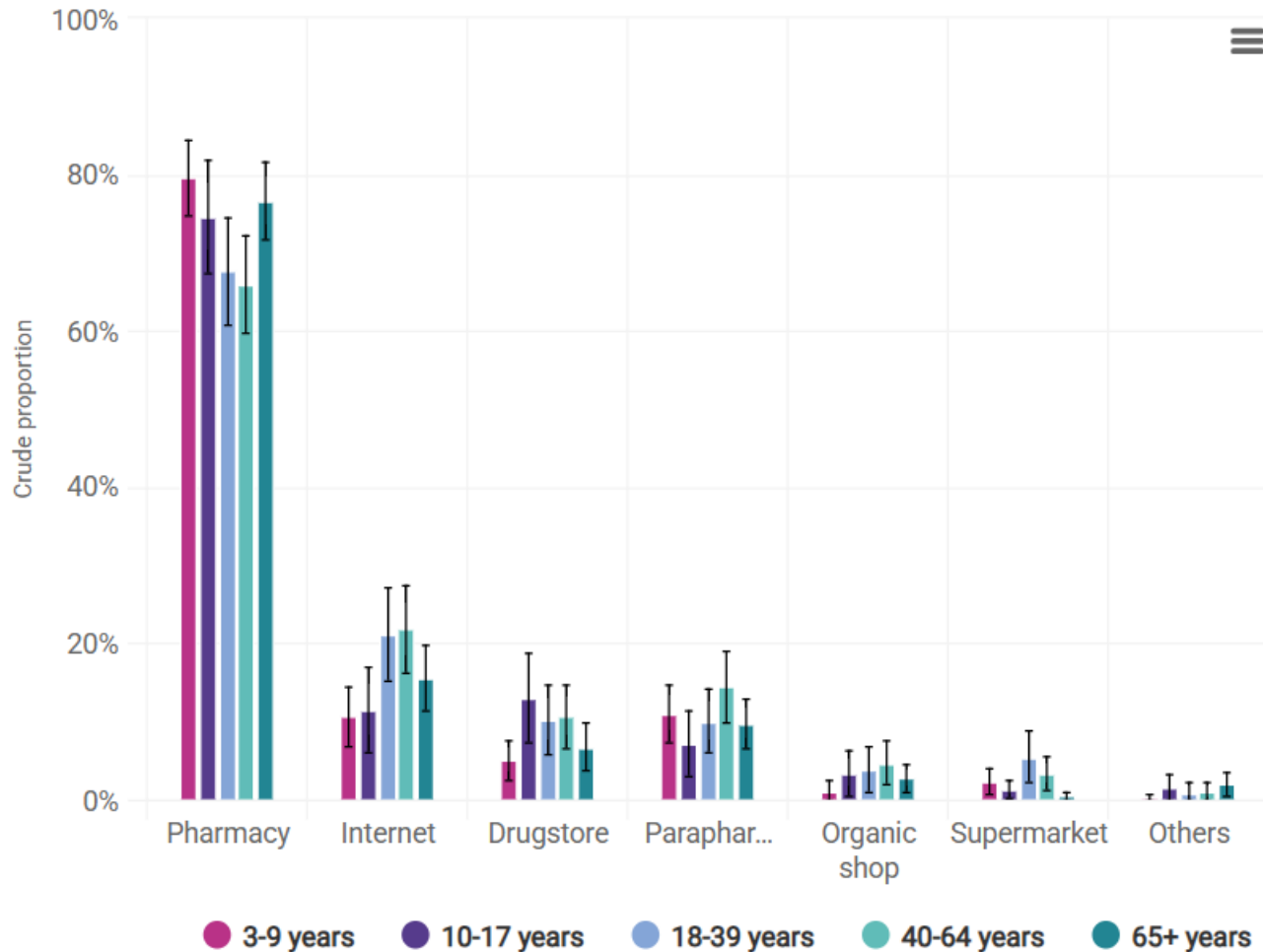
Source: IQVIA CH Data, public price, MAT 07/2026 (be-sup ASM, 17/09/2026). Pharmacy only, excludes online and para-pharmacy. Category names as used by IQVIA. Flanders = IQVIA region North (Antwerp, Limburg, East and West Flanders, Flemish Brabant). Shares calculated from IQVIA regional shares and rounded national totals.





The place of purchase of food supplements

Source:  sciensano



1. Pharmacies: 71%
2. Online: 18%
3. Parapharmacy: 8%



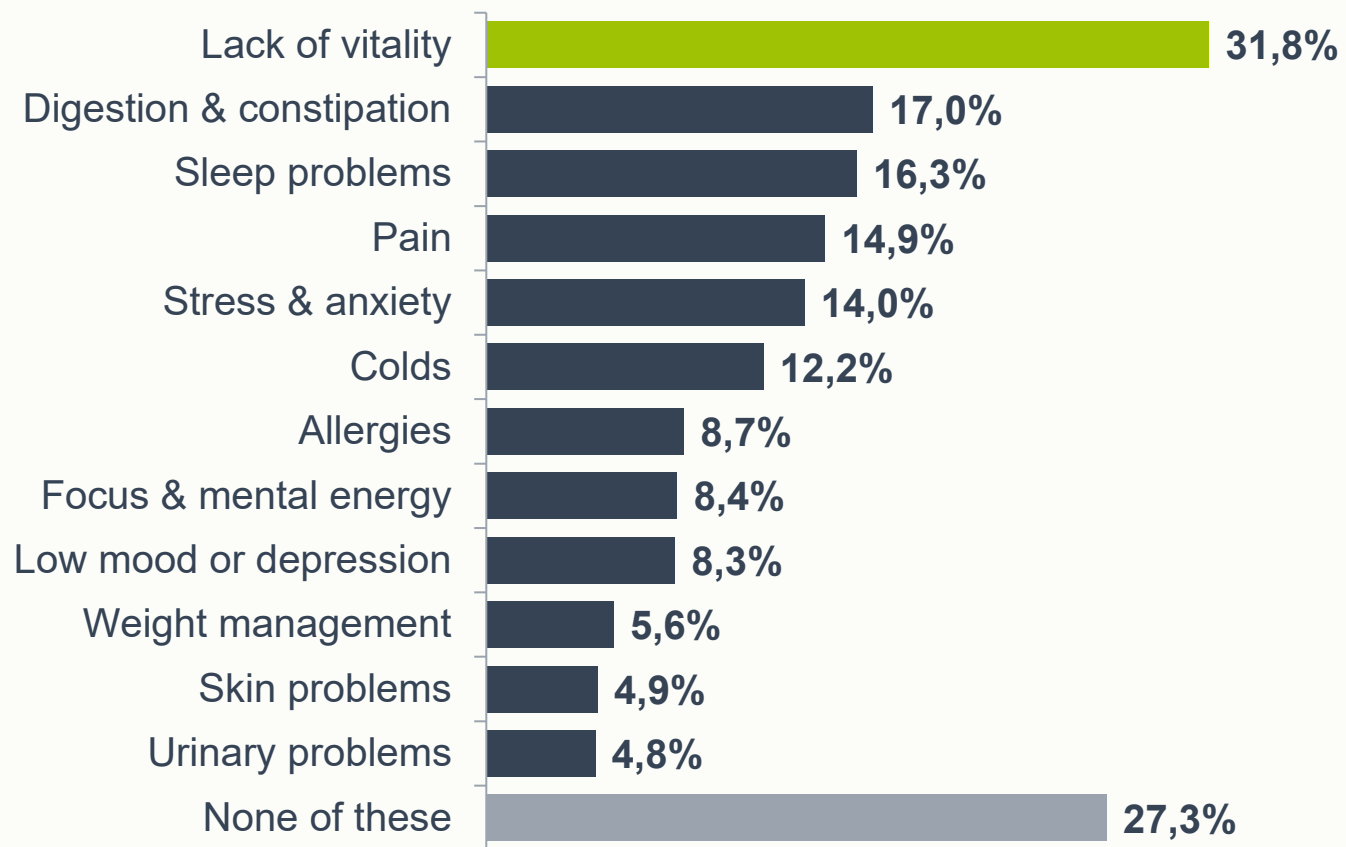
Online purchase by age

- 3-9 years: 11%
- 10-17 years: 12%
- 18-39 years: 21%
- 40-64 years: 22%
- 65+ years: 16%



Reasons for food supplement use

Why users bought or took food supplements in the last 6 months, % of users, multiple answers possible



Used food supplements in the last 6 months

48.4%

of Belgians aged 21-70

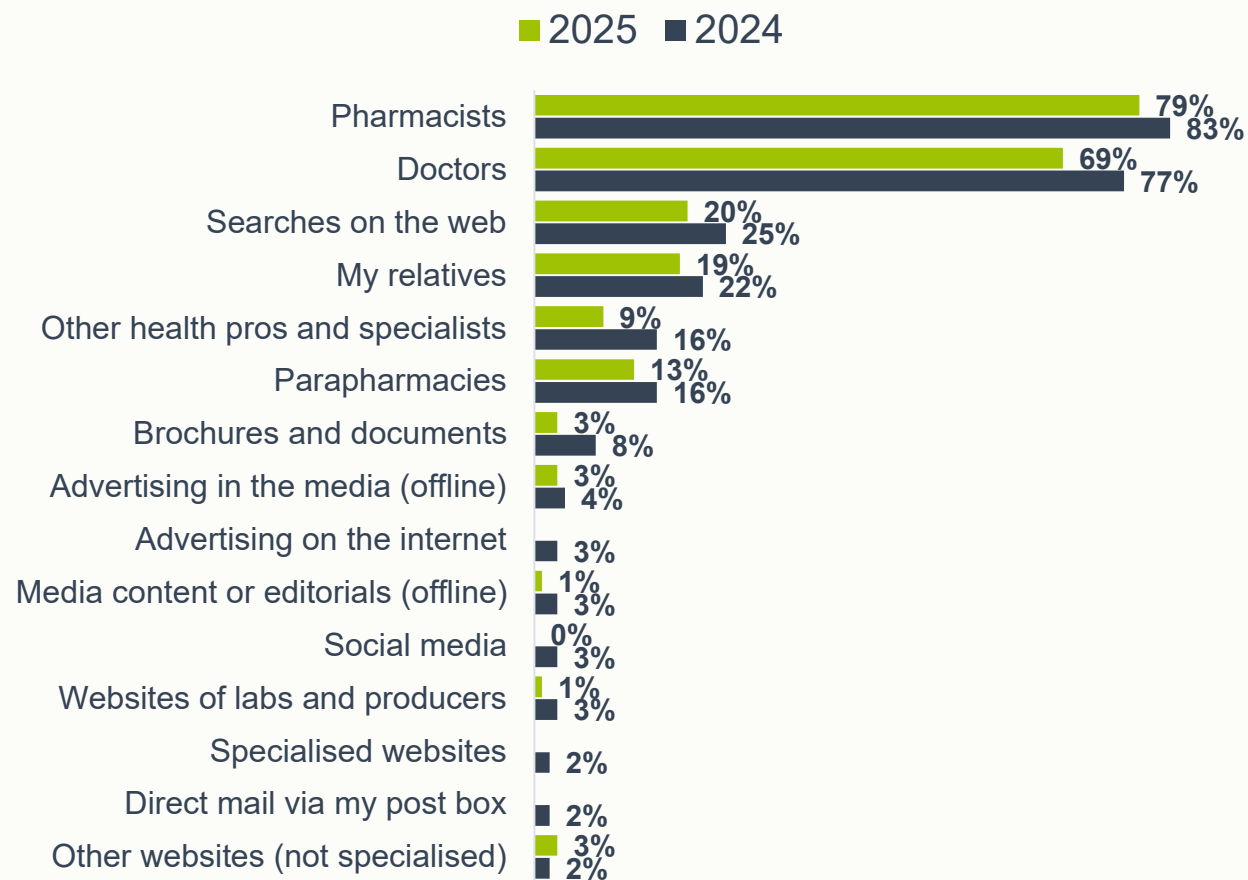
Source: CIBH 2026 (AQR / Polaris), 1,000 weighted interviews, Belgian residents aged 21-70. Base: food supplement users (n ≈ 484).
The category covers food supplements, vitamins, essential oils, phytotherapy and other plant-based products. Concerns as worded in the survey.





Preferred sources of information

The pharmacist and the doctor carry the category, every digital source is marginal



Source: CIBH 2025 (AQR / Polaris)





Trends



Six trends that shape our market

Demography, health awareness and technology are changing who takes food supplements, and why. The following trends build on these six shifts.



AGEING

2.5 million Belgians are aged 65+ in 2026. For every 100 people of working age, 29 are aged 67+, rising to 42 by 2070.



BIRTH RATE

1.44 children per woman in 2024, with mothers aged 31.4 years on average at childbirth.



HEALTH FIRST

Healthcare is the number one societal concern for Belgians (31%), up from fifth place in 2023.



PREVENTION

2 in 3 consumers find healthy eating important. Weight, energy, immunity and mood drive that choice.



SUSTAINABILITY

Sourcing, packaging and transparency are becoming purchase criteria instead of nice-to-haves.



PERSONALISATION

From lifestyle questionnaires to microbiome and DNA based advice, tailored to the individual.

Sources: Statbel and Federal Planning Bureau, population projections 2025-2080 (via IQVIA 2026) | Statbel, births and fertility 2024 | Sustainapoll 2024 | Wagralim consumer survey 2023



Belgium is living longer than it is living well



LIFE EXPECTANCY VERSUS HEALTHY LIFE YEARS



Life expectancy at birth: 82.4 years

82.4 years

Life expectancy at birth in Belgium, 2024. Women reach 84.4 years, men 80.3.

64 years

Healthy life years in Belgium, 2023. The figure has barely moved since 2005.

1.44 children

Children per woman in 2024, with the average mother now 31.4. The population keeps ageing.

The years being added to life are not being added to health. That gap of roughly eighteen years is where prevention, diet and supplementation can make a difference.

Sources: Statbel, life expectancy at birth 2024; Eurostat healthy life years (hlth_hlye) 2023; Statbel fertility statistics 2024.



Belgians want to eat well, but mostly do not ...



INTENTION

2 in 3

Belgian consumers consider healthy eating important, and 1 in 5 consider it extremely important.

Their reasons: weight, energy, immunity, disease prevention, life expectancy, mood, stress, sleep and cognition.

REALITY: SCIENSANO FOOD CONSUMPTION SURVEY

7%

of adults eat the recommended amount of vegetables. For fruit it is 10%, for dairy 11% and for wholegrain products 1%.

For folate, calcium, riboflavin and vitamin C, the majority falls below the requirement from food alone.

High intention with low execution is the gap the category operates in, and it is also why a better diet stays the first recommendation.

Sources: WAGRALIM survey among 1,000 Belgian consumers, 2023; Sciensano, National Food Consumption Survey 2022-2023.



Healthy ageing: the category in practice



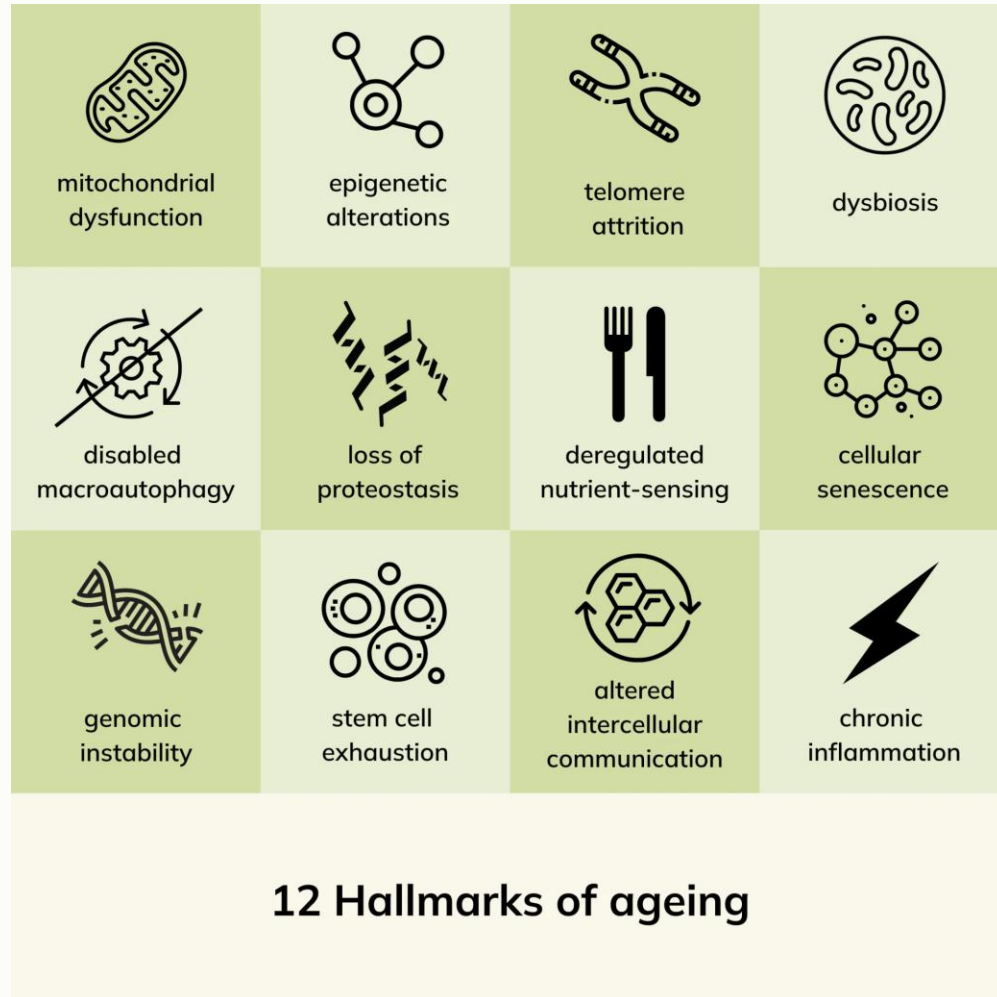
BY BODY SYSTEM

Body system	Established ingredients
Vision	Lutein, zeaxanthin
Cardiovascular	Omega-3, coenzyme Q10
Bone and joints	Vitamin D, calcium, curcumin, collagen
Muscle	Creatine, protein, vitamin D
Skin	Collagen, hyaluronic acid
Cognition	Omega-3, B vitamins

Vitamins and minerals are 43% of the Belgian market and grew 6.0% last year. Source: IQVIA / be-sup Association, MAT 07/2026; Nutriform Business Days 2026.



Cellular health



Resveratrol
Quercetin
Spermidine
Glutathione
Coenzyme Q10
...



Gut health and the gut-brain axis



THE SECOND LARGEST BLOCK, NOW LEVELLING OFF

- Link between the microbiome and mood
- Subject to many studies: e.g.: “French Gut” cohort following 100,000 volunteers.
- Consumer awareness : one in three has heard of the microbiome, one in five can explain it.

WHAT SITS ON THE SHELF

Probiotics

Prebiotics

Postbiotics

Enzymes

Glutamine

Curcumin

Fibre

= 14% of the Belgian market

Source: IQVIA / be-sup Association, MAT 07/2026; Vitafoods Barcelona, Nutriform Business Days 2026.



Brain, mood and sleep



FROM NOOTROPICS TO NEURO-INFLAMMATION

- ✓ Mental health: increased attention
- ✓ One in six Europeans lives with a mental disorder.
- ✓ The scientific framing has shifted towards neuro-inflammation and mitochondrial function, which brings a second generation of ingredients alongside the familiar ones.

ESTABLISHED AND EMERGING

Magnesium

L-theanine

Ashwagandha

Saffron

Valerian

Rhodiola

Omega-3

PEA

Ubiquinol

7% of food supplements are for sleep and mood

Source: IQVIA / be-sup Association, MAT 07/2026; Vitafoods Barcelona, Nutriform Business Days 2026.



Glucose and metabolic health



INGREDIENTS IN PLAY

Chromium

Berberine

White mulberry

Cinnamon

Green tea

Inositol

Apple cider vinegar

Sources: IQVIA / be-sup Association, MAT 07/2026; Vitafoods Barcelona, Nutrifarm Business Days 2026.



Women's health, one life stage at a time

DESIGNED FOR LIFE STAGES, NOT FOR DEMOGRAPHICS



Life stage	What is addressed	Ingredients in play
Adolescence	Cycle regularity	Iron, magnesium, evening primrose
Reproductive years	Fertility and preconception	Folate, inositol, iodine
Pregnancy and postpartum	Recovery and lactation	Folate, vitamin D, omega-3
Perimenopause	Hot flushes, mood, dryness, sleep	Ashwagandha, black cohosh, soy, phytoestrogens
Later years	Bone, vitality, cognition	Calcium, vitamin D, omega-3

Men's health remains the smaller mirror image

- Prostate, urinary comfort
- Fertility
- Urinary and reproductive care
- Ingredients: saw palmetto, zinc, selenium and lycopene



Beauty from within



WHERE NUTRITION MEETS COSMETICS

Topical care outside, micronutrition inside.

- oxidative stress,
- inflammaging
- glycation.

THE ACTIVE SET

Collagen

Hyaluronic acid

Astaxanthin

Vitamin C

Vitamin E

Zinc

Selenium

Polyphenols

Source: IQVIA / be-sup Association, MAT 07/2026, Vitafoods Barcelona, Nutrifarm Business Days France



Immunity and vitality



LARGEST IN EUROPE

Vitality and immunity remain the biggest block in Europe at around 7.8 billion euro, and the most innovative one.

WHAT CONSUMERS BUY

Vitamin D

Vitamin C

Zinc

Echinacea

Elderberry

Beta-glucans

Multivitamins

31.8% of supplement users name lack of **vitality** as a reason for use

Sources: IQVIA / be-sup Association, MAT 07/2026; CIBH 2026 (AQR / Polaris); Nutrifarm Business Days 2026.



Plant-based diets and the nutrients they miss

A DIETARY PATTERN WITH A PREDICTABLE GAP

Plant-based eating keeps growing
Nutrients at risk



NUTRIENTS AT RISK

Vitamin B12

Iron

Calcium

Vitamin D

Omega-3

Iodine

Zinc

70% of Belgians fall below the requirement for folate

67% for calcium

21% for iron

Source: Sciensano, National Food Consumption Survey 2022-2023. Figures apply to the general population, not to vegans specifically.



Measuring replaces guessing



PERSONALISATION SHIFTS FROM QUESTIONNAIRES TO MEASURED VALUES

Metabolic and inflammatory

Fasting insulin and HOMA, high-sensitivity CRP, homocysteine.

Functional and body composition

VO2max, DEXA, continuous glucose monitoring, heart rate variability.

Cellular and biological age

PhenoAge, GrimAge and DunedinPace, the omega-3 index and NAD status.

Sources: Nutrifarm Business Days 2026, Dr Natalia Trpchevska and the Toluna consumer study.



Sustainability and the clean label



FROM PACKAGING TO PLANETARY HEALTH

WHAT IS BEING ASKED

Clean label

Organic

Ingredient origin

Packaging

Carbon footprint

Eco-toxicity

Due diligence

Source: Nutrifarm Business Days 2026, Vitafoods 2026



Questions?
Thank you for your
attention!