



CBI
Ministry of Foreign Affairs

CBI Product Factsheet:

Natural Ingredients for Anti-Obesity products in Europe

Introduction

Demand for anti-obesity products is growing, as obesity is one of the fastest-growing health conditions in contemporary society and one of the leading causes of death. To a certain extent, it is a condition which can be prevented and cured. Opportunities within natural ingredients for anti-obesity products can be found in food supplements.

Indication & product definition

Obesity

Obesity is defined as abnormal or excessive fat accumulation which may impair health. Alongside being generally overweight, it is the fifth leading cause of global deaths. It represents a major risk of non-communicable conditions, such as cardiovascular diseases, musculoskeletal disorders and some types of cancer. The fundamental cause of obesity is an energy imbalance between calories consumed and calories expended. This being the case, obesity can be prevented by appropriate physical activity, controlled calorie intake and generally correct diet.

Box 1: How to use this Factsheet

- Learn how European consumers use food supplements for anti-obesity products.
- Learn about the developing country species that are most commonplace and of greatest interest.
- Learn about requirements you need to meet for established and non-established species.
- Learn more about market segments for anti-obesity products, and receive key insights into how to enter them.

If the condition is already advanced, the treatment of obesity can take different forms. Anti-obesity substances:

- Suppress the appetite.
- Increase the body's metabolism.
- Interfere with the body's ability to absorb specific nutrients in food.

Obesity and natural health options

Natural anti-obesity products are increasingly common in the European market, providing an alternative to currently available chemical treatments or medical interventions (e.g. bariatric surgery). These natural alternatives are mainly found in the realm of food supplements, given that dietary changes are closely linked to preventing and fighting obesity. Products that generally support metabolic activity and provide a feeling of satiety are also associated with anti-obesity treatment. The plant world offers options of interest for this indication. Herbal medicinal products, on the other hand, are not relevant for this indication, as there are no licences within herbal medicinal products for the treatment of obesity and little documentation to support its use (apart from exceptions such as dandelion as an appetite suppressant).

Natural ingredients for anti-obesity products

According to industry sources, botanicals can be effective in fighting obesity. The most commonly used plants in Europe are:

- to reduce appetite: dandelion root (*Taraxacum officinale*), wormwood (*Artemisia absinthium*)
- to increase metabolic activity: bladderwrack (*Fucus vesiculosus*), fennel (*Foeniculum vulgare*)
- for their laxative properties: senna (*Senna alexandrina*), green tea (*Camellia sinensis*).

Other natural ingredients allowed for anti-obesity can be found on the website of the [European Medicines Agency](#). Examples include mate, ginger, tea and psyllium.

Exemplary species for developing country producers

Not all of the species mentioned above are equally relevant to exporters from developing countries. Most of these species are produced in Europe (i.e. dandelion root, wormwood and bladderwrack). This means that exporters from developing countries would face strong competition in these markets, making them difficult to enter. Regarding the other species, fennel and senna are discussed in the CBI Fact sheet Digestive Health.

Industry sources indicate that there is good potential concerning the following species, some of which are listed above: yerba mate (*Ilex paraguariensis*), nopal (prickly pear) cactus (*Opuntia ficus-indica*), chilli (*Capsicum annuum*), green coffee (*Coffea spp* e.g. *Coffea arabica*), green tea (*Camellia sinensis*) and garcinia (*Garcinia cambogia*). These species offer opportunities to developing country exporters in the treatment of obesity, as will be explained in the sections below.

Tips:

- If you want to enter the European market with new or established ingredients, please refer to the [CBI Module Buyer Requirements](#) for information and tips. Many other plants are used in anti-obesity products worldwide. Some of these can be/are already being used in Europe. In terms of entering the market with new species, it is important to have evidence on their efficacy in treating this condition, but entry may be difficult regarding products that aim to prevent joint conditions.
- Link up with local universities or laboratories to conduct thorough research and product development. This can help with substantiating any claims.
- Investigate existing intellectual property and include this in your product documentation.
- If you produce fennel or senna, check the [CBI Product Factsheet on Natural Ingredients for Digestive Health](#) products for further information.
- If you produce yerba mate or tea extracts, check the [CBI Product Factsheet on Natural Ingredients for Energy products](#), which discusses these botanicals from this perspective. For the same reason, producers of cayenne should check the [CBI Product Factsheet on Natural Ingredients for Joint Health products](#).
- Check databases such as [Herbmed](#) to identify research on traditional use, clinical trials (safety and efficacy evaluation of herbal formulations on people) and patents. In Europe, you can contact relevant universities such as the [University of Vienna](#), the [University of Veterinary Medicine Vienna](#) and the [University of Graz](#). Access scientific resources, for example through [Elsevier Science Direct](#) (not for free). Also consider becoming a member of the [Society for Medicinal Plant and Natural Product Research \(GA\)](#) to access their research.

The table below provides information on exemplary species used to fight obesity, including available documentation and references, claims, origins, as well as data on traditional use, clinical trials and filed patents¹ to determine possible product development activity for specific species. The products based on these ingredients are mostly offered as pills in dosage forms, but can also find applications in tonics or herbal teas, for example.

Table 1: Selected key anti-obesity species

Definition	Monographs ²	Permitted usage in supplements ³	Origin	R&D
<p><i>Ilex paraguariensis</i> (yerba mate)</p> <p>In addition to several health benefits such as detoxification, mood improvement etc., yerba mate is known to act as an appetite suppressant and weight loss tool. In addition, some non-blind studies have found yerba mate consumption to be effective in reducing lipids.</p> <p>Most consumption of yerba mate is by means of infusion in</p>	<p>No WHO Monograph available. No ESCOP monographs. European Pharmacopoeia monographs: # 2678 Mate leaf Final Community Herbal Monograph</p> <p>No well-established use of yerba mate in herbal medicinal products has been documented.</p>	<p>Belgium, France and Italy: allow use of the leaf only. Germany: allows use of leaf only, provided it is indicated for mental and physical fatigue, with a restricted dosage of 3 g/day.</p> <p>Food supplements cannot make a medicinal claim; exemplary claims (from the UK) made for supplements containing yerba mate are: "Helps maintain a healthy body weight"</p>	<p>South America: Argentina, Bolivia, Brazil, Uruguay, Paraguay.</p>	<p>Herbmed has not registered research on yerba mate.</p> 

¹ Information on traditional use, clinical trials and filed patents should be used as an indication only. Additional research for your specific species will be required.

² Only European Pharmacopoeia monographs (legally binding), Community Monographs (non-binding) and entries (binding) are valid in the EU. WHO monographs provide information on the use to which herbs are put in medicine systems outside of Europe, including information on growing conditions, purity tests, chemical constituents and an overview of the botanical's specific action. ESCOP monographs provide a basis for EMA dossiers on herbal medicinal products. They are a reference standard (not legally binding).

³ Indication only. This information is unavailable in many countries, but it is expected to be comparable

<p>Argentina, southern Brazil, Paraguay and Uruguay.</p> <p>In Europe, yerba mate can be found in some specialist health shops and sometimes in large supermarkets. Its use as a supplement has great potential, although it is not yet widespread in the market.</p>	<p>As a traditional herbal medicinal product, claims can include use for: "relief of fatigue and sensation of weakness" "increase in the amount of urine". This being the case, yerba mate offers limited opportunity for use in herbal medicinal products for obesity.</p>	<p>"...may help with weight management".</p>		
<p>Opuntia ficus-indica (Nopal (prickly pear) cactus) Nopal cactus is used to balance body weight through shaping/limiting the absorption of nutrients. It also combats obesity by regulating the digestive system.</p> <p>In addition, this species is known to have antioxidant properties, which makes its use as a supplement quite common in the Western European market.</p>	<p>No monographs available.</p> <p>No well-established or traditional use of nopal cactus in herbal medicinal products has been documented.</p>	<p>Belgium: allows use of flower, fruit and root. France: allows use of cladode, flower, fruit and root. Italy: allows use of cladode, flower and fruit. Germany: not listed; thus permitted usage in Germany is unclear.</p> <p>Food supplements cannot make a medicinal claim; an exemplary claim (from the UK) made for supplements containing nopal cactus is: "Nopal is a valuable source of fibre as well as 17 amino acids".</p>	<p>South America</p>	<p>Herbmed has not registered research on Nopal cactus.</p> 
<p>Capsicum annuum (cayenne pepper, mainly from Capsicum annuum longum) There is a large market for this product, especially for food. As such, it is also produced on a large scale. Nevertheless, there are opportunities for smaller players to enter the market.</p> <p>The use of Capsicum annum extract as a weight loss supplement is increasingly common in the European market. In some cases, it is used in combination with other ingredients, as in the case of Capimax (capsicum extract, caffeine, black pepper extract and niacin).</p>	<p>No WHO Monograph available. ESCOP Monographs 2nd Edition Suppl. (Capsici fructus) European Pharmacopoeia Monographs # 1859 Capsicum # 2336 Capsicum oleoresin, refined and standardised # 2337 Capsicum tincture, standardised # 2529 Capsicum soft extract, standardised Rapporteur assigned for Community Herbal Monograph for Capsicum fructus</p> <p>No well-established use or traditional use of capsicum in herbal medicinal products has been documented.</p>	<p>Belgium: allows use of all plant parts of Capsicum annuum L., allows use of fruit and sapwood of Capsicum frutescens L. France: allows use of fruit. Italy: allows use of fruit and oleoresin. Germany: allows use of fruit.</p> <p>Food supplements cannot make a medicinal claim; exemplary claims (from the UK) made for supplements containing cayenne/capsicum are: "The capsicum ingredient may help normal metabolism and a healthy weight" "The capsicum may help to maintain a normal appetite" "May help to maintain normal blood glucose and tricaylglycerol levels".</p>	<p>Cultivated in South Asia and introduced elsewhere. India is a very large producer.</p>	<p>Little research has been done on capsicum (as Capsicum frutescens): Herbmed registered 8 articles on traditional use, 13 clinical trials and 1 patent.</p> 
<p>Coffea spp, e.g. Coffea arabica (green coffee beans) The use of green coffee extracts as a tonic, metabolic support and antioxidant supplement is very common in the European market. New scientific evidence also suggests that green coffee extracts help control fluctuations in blood sugar levels, as well as weight balance.</p> <p>For existing producers of coffee, extracts offer the potential for diversifying their</p>	<p>No monographs available.</p> <p>No well-established use or traditional use of green coffee in herbal medicinal products has been documented.</p>	<p>France and Belgium: allow use of Coffea arabica and Coffea canephoraI beans. Italy: allows use of Coffea arabica beans. Germany: allows use of Coffea arabica beans as food only.</p> <p>Food supplements cannot make a medicinal claim; exemplary claims (from the UK) made for supplements containing green coffee are: "...to ensure maximum performance and weight loss" "Deemed an effective weight-loss food by author...".</p>	<p>Latin America, Africa, Asia</p>	<p>Herbmed has not registered research on coffee beans.</p> 

operations and adding value to lower-grade coffee beans.				
<p>Camellia sinensis (tea) Demand for tea extract is high. For existing producers of (green) tea, green tea extracts offer the potential for diversifying their operations and adding value to lower-grade tea leaves.</p> <p>In general, there is growing consumer interest in the laxative properties of green tea as a way to cleanse the body and prevent/treat obesity. This interest and its high levels of antioxidants support its use in food supplements.</p>	<p>No WHO Monograph available. European Pharmacopoeia Monograph # 2668 (Camelliae sinensis non fermentata folia) Community Herbal Monograph,</p> <p>No well-established use of tea in herbal medicinal products has been documented. As a traditional herbal medicinal product, claims can include use for: "relief of fatigue and sensation of weakness". Thus it offers limited opportunity for use in herbal medicinal products for obesity.</p>	<p>Belgium and France: allow use of leaf subject to stating the max. Epigallocatechin gallate (antioxidant) level. Italy: allows use of leaf, e.g. for antioxidant function. Germany: allows use of leaves, buds, stems and flowers.</p> <p>Food supplements cannot make a medicinal claim; exemplary claims (from the Netherlands) made for supplements containing tea are: "the powerful antioxidant properties of polyphenols may help with weight loss, cholesterol and blood sugar levels". Example from the UK: "Green tea may help to maintain normal appetite control, fat digestion, metabolism and cholesterol levels".</p>	<p>Large-scale cultivation in South/South East Asia, China, East Africa</p>	<p>Much research has been done on tea: Herbmed registered 29 articles on traditional use, 168 clinical trials and 3 registered patents in 2013.</p> 
<p>Garcinia cambogia (garcinia) In traditional medicine (e.g. Jamu from Indonesia), the fruit of Garcinia cambogia has been used as a stool softener and to treat constipation.</p> <p>Garcinia's gum resin is mainly used as a supplement to balance body weight, to act as an appetite suppressant and to break down lipids. The supplement first became popular in the USA, after having appeared on the television show Dr. Oz. It then spread to the European market. Nowadays, garcinia competes with more popular supplements such as green coffee extracts.</p>	<p>No monographs available.</p> <p>No well-established use or traditional use of garcinia in herbal medicinal products has been documented.</p>	<p>Belgium: allows use of gum resin. France: not listed, thus permitted usage in France is unclear. Italy: allows use of gum resin and fruit. Germany: allows use as food only.</p> <p>Food supplements cannot make a medicinal claim; exemplary claims (from the Netherlands) made for supplements containing garcinia are: "...stimulates the thyroid gland and increases fat burning" "...together with low-calorie diet and exercise it forms a cornerstone in weight reduction".</p>	<p>Southeast Asia, India, parts of Africa.</p>	<p>Herbmed registered 8 articles on traditional use, 11 clinical trials and 6 patents.</p> 

Source: Herbmed 2012, [ESCOP](#), [EDQM](#), [EMA](#), national food regulators

What is the demand for anti-obesity products in Europe?

- Demand for food supplements is strongest in Germany, France, Italy and the UK. The strongest growth in this segment stems from Eastern European countries, such as Poland, Romania and Slovakia.
- There is an increasing focus on and awareness of obesity in Europe, as is shown by figures on anti-obesity treatments. In 2012, the European market for anti-obesity treatments reached a value of around \$ 400 million, including medicines and devices. The most popular treatment was malabsorption drugs, followed by combinations of drugs and appetite suppressants. Research on Products, Technologies and Markets Worldwide for the Clinical Management of Obesity estimates that the European market will be worth nearly \$1billion by 2019, mostly expanding in combination with appetite suppressant drugs.
- Despite policy makers' increasing concerns about obesity and positive market developments regarding anti-obesity drugs in Europe, the pace of growth is slower than in other parts of the world owing to strict reimbursement policies and recent medication bans (e.g. Reductil).

Obesity

In order to estimate the need for anti-obesity products, statistics have been included on obesity in Europe.

- On average, 17% of the adult population in the EU is obese. When taking the population that is overweight into consideration, this number rises to over 50% of the EU population. According to the WHO, overweight affects 30-70% of adults in EU countries and obesity 10-30%.
- The rate of obesity has doubled over the past 20 years in many European countries, varying significantly from country to country. In Romania, for instance, obesity affects around 8% of the population, whereas the rate of obesity is much higher in Ireland, the UK, Hungary and the Czech Republic (over 25%).
- Projections for 2030 show high anticipated levels of male obesity in Ireland (58%), Greece (40%), the Czech Republic (38%) and the UK (35%).

Tips:

- For the full statistics on obesity in the EU, please have a look at the [OECD's Health at a Glance: Europe 2014](#).
- Please refer to [CBI Trade Statistics for Natural Ingredients for Health Products](#) for statistics on European markets for herbal medicinal products and food supplements.
- For more information on sector associations in various European countries, please refer to the sources and promising countries (France, Germany, Italy and the UK) on the [CBI Natural Ingredients for Health Products website](#).

Market trends

Need in society: there is an increasing need for Europeans to prevent and treat obesity. Obesity figures continue to rise and scientific studies are showing a stronger correlation between obesity and other diseases, while health costs are growing.

Tip:

- Do not make health claims for food supplement ingredients if such claims have not been authorised by the European Commission. Regarding botanicals, no health claims have yet been assessed, but this is expected to happen in the future. You need to take this into account in your own documentation and marketing (materials). For an overview of health claims, check the [EU Register on nutrition and health claims](#).

Consumer awareness health: Demand is increasing for food supplements that either prevent or fight obesity. Due to growing consumer awareness of general health and wellbeing, healthy diets and lifestyles are increasingly important.

Tip:

- Do not make medicinal claims for your product in your product documentation or marketing materials if you are targeting the food supplements market. Claims in food supplements can relate only to function (e.g. relating to growth, development and functions of the body, psychological and behavioural functions, slimming or weight-control) and risk reduction. For example, you may not claim that your product can cure depression, but you may stress that a certain species can help maintain good health. Also ensure you have the research results to back up your claim with any potential buyer.

Side-effects of conventional medicine: Consumers believe that herbal food supplements and remedies are mild, have fewer side-effects and are safer to use than anti-obesity drugs available on the market. As anti-obesity drugs interfere with normal body functions they may lead to various negative side-effects. Additionally, the condition may easily reoccur in consumers who stop taking these drugs.

However, certain anti-obesity herbal remedies also have considerable side-effects. A case in point is hoodia (*Hoodia gordonii*), an appetite suppressant which has caused controversy since its introduction to the European market. Some of the reported concerns regarding this ingredient were liver damage and dehydration. Note that the commercialisation of this plant was accompanied by great controversy concerning intellectual property rights and benefit-sharing issues. Furthermore, available scientific information is insufficient, raising considerable concern about its use as an anti-obesity solution.

Multiple ingredients: there is a trend towards the use of multiple ingredients in food supplements that target a specific condition. Examples are anti-obesity supplements that also combine species containing antioxidant properties, such as green tea plus açai.

Tip:

- Emphasise the potential for combining herbs with fruits, vitamins and minerals in order to create food supplements that can (help) combat obesity or related conditions. Examples are supplements containing *Capsicum annum* extract, black pepper extract, caffeine and niacin for fat burning and increased energy.

Tradition of use: traditional uses can benefit the marketing story with regard to food supplements. An example is dandelion, which has a long documented history of use for weight control.

Tip:

- Look for species with traditional uses when you are looking for new anti-obesity ingredients. Find out about the local practices that exist to remedy weight control/to increase metabolic activity.

Research: Research is essential in order to substantiate anti-obesity claims. For most important species used in existing food supplements, a wealth of data and documentation is available. Any new ingredient would need to compete with products that are very well established both commercially and scientifically.

Tips:

- Look for a partner in Europe to help build the marketing story and the business. Find a company which is interested and sees potential for the (new) ingredients. Please refer to the section on market segments and to the useful sources section for more information on finding companies.
- Determine whether your product is suitable for long-term use. This is especially important for specific issues related to obesity, such as appetite control, lipid-lowering, etc. To aid these conditions, consumers need to use products on a long-term basis. Although European manufacturers are responsible for product safety, providing such information supports your marketing effort.
- Please refer to [CBI Trends](#) for more market trends.

What requirements should natural ingredients for anti-obesity products comply with to be allowed on the European market?

This factsheet considers the food supplements industry only. As herbal medicinal products are not relevant in anti-obesity health products, requirements for this segment are not included. The distinct legislative frameworks and route to market of herbal medicinal products and food supplements are explained in detail in the [Module Buyer Requirements](#).

What requirements do I need to comply with to export natural ingredients?

- You need to comply with the **Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES)**. CITES regulates the trade in (for example) wild-collected endangered plants and provides guidance on the species for which trade is prohibited or restricted.
- Your ingredient might require you to establish **Access and Benefit Sharing (ABS)** agreements. These 'mutually agreed terms' detail the terms and conditions of access and use of genetic resources and/or traditional knowledge and supply of raw materials.
- You need to ensure **sustainable sourcing** of your ingredients. This is important to buyers, as they are facing supply shortages for an ever-increasing number of cultivated, but especially wild-collected species. You do not always have to certify sustainable sourcing; have a look at these value-addition opportunities in the section [Competition](#).

Tips:

- Conduct a resource assessment and implement a resource management system.
- If you are an exporter of wild-collected botanicals or their derivatives, take into account the provisions of [CITES](#) in order to guarantee the EU entry of your products. Check [Annex A and B of Regulation \(EC\) No 338/97](#) to ascertain whether import and export permits are required for your product. You can also contact the [local CITES authority](#).
- Read more about [CITES](#) in the EU Export Helpdesk.
- Put a procedure in place to check whether ABS applies. Contact the competent authorities in your country as a starting point. [UEBT](#) and [FairWild](#) provide thorough information on the practical implications of ABS, as established by the [Convention on Biological Diversity](#).

What requirements do I need to comply with to enter the EU market for food supplements?

EU Legislation specific to food supplements: In addition to general requirements for food, as established under General Food law, food supplements are subject to specific legislation. This legislation lays down compositional and labelling requirements, but still leaves composition beyond minerals and vitamins (e.g. essential fatty acids, fibre, and various plants and herbal extracts) at the discretion of national authorities.

Tips:

- Familiarise yourself with the legislation on food supplements, which is listed on the [website of the European Commission](#).
- Make sure that your ingredients comply with [general requirements for food](#) and food labelling. Buyers usually demand compliance with guidelines for herbs according to [Codex Alimentarius](#). Standards have not been established for extracts.
- Check the positive lists of European countries to determine whether your ingredient is already allowed in those markets or whether there are species that you could potentially produce in your country. You can find such lists at:
 - [German Federal Ministry of Food and Agriculture](#)
 - [Italian Ministry of Health](#) (BELFRIT list for Belgium, France and Italy).

Food safety: Ingredients for food supplements need to comply with requirements for food safety. You can read more about food safety and Novel Food requirements on the websites of the [EU Export Helpdesk](#) and the [European Commission](#).

Tips:

- [Novel Food Regulation](#): consumer safety of ingredients that were not consumed within the EU before 15 May 1997 needs to be assured to comply with this regulation. Consult experts and internet research for insights into whether there is historical use in Europe. The (non-exhaustive) [Novel Food Catalogue](#) lists plants subject to the Novel Food Regulation and provides their current status.
- [Maximum Residue Levels \(MRLs\)](#): strict control of pesticide use must be a focal point in your production system. These controls are increasingly strict, as improving laboratories can detect more residues.
- Criteria and maximum levels of [contaminants in food](#) and [microbiological contamination of food](#): Apply GACP/GAP and GMP to minimise and document contamination.
- [Hygiene of food \(HACCP\)](#): legally binding for food processors (including ingredients) and recommended for farmers (primary production).
- Find out which [extraction solvents for food](#) you can use and under which conditions.
- [Irradiation of food](#) is only permitted in specific cases for spices and herbs, including supplements.
- [Traceability is based on the](#) "one step back-one step forward" principle; you need to trace food that is used for consumption through the value chain.
- Be ready to demonstrate traceability by documenting your value chain. If you want to have your product certified (e.g. FairWild, Fairtrade or organic), traceability will be important as well.
- Moreover, have a look at common causes for border rejection and product withdrawals on the [Rapid Alert System for Food and Feed \(RASFF\)](#). Examples include contaminants and unauthorised food ingredients.
- Check and adhere to the food safety legislation in your country.

What additional requirements do buyers often have?

Buyer specifications and requirements: Many buyers have additional quality requirements which can go beyond legislation and standards (active ingredient content, moisture content, contaminants, residues, etc.). These are established in buyer specifications. To show that you meet their specifications, they also require well-structured company and product information, including detailed technical data sheets.

Tips:

- Make sure you meet international product standards and buyer specifications.
- Include plant identification through a national and/or a company herbarium in your product specifications, this is important as a reference.
- Prevent (un-)intended adulteration and contamination by other foreign materials by keeping facilities and equipment clean, and by ensuring full documentation and traceability.
- If you produce extracts, you need to meet buyer requirements in terms of extraction methods, solvent use, preservatives, etc. Validate and document extraction conditions: processing aids, temperature, pressure/vacuum, flow rate, etc.
- If you use preservatives, make sure you have the HR capacity to tailor their use to buyer specifications and for their proper documentation. You also need specialist staff to monitor process quality and microbiology.
- Make sure your documentation and labelling comply with respective legislation and buyer requirements. Information on possible dangerous characteristics of chemical substances must be provided on Material Safety Data Sheets. Furthermore, it is likely that your buyer requires test reports.
- Implementing and documenting Standard Operating Procedures can provide a lot of trust on the part of buyers that you will keep up quality standards.

What are the standards and requirements for niche markets?

Social and environmental sustainability:

- If you want to market **organic ingredients** in the EU, you need to comply with EU requirements on the production and labelling of organic products of agricultural origin.
- Verifying and certifying **sustainable production** represents a niche market, but can add value to your product. For more information on such value addition, please refer to value-addition opportunities in the section [Competition](#). Better-known sustainability standards include:
- The [UNCTAD BioTrade Initiative BioTrade Principles and Criteria](#) or [FairWild Principles and Criteria](#)
- Social: Fair Trade certification, such as [FLO Fairtrade](#) or [FairForLife](#).
- Some EU buyers may expect you to comply with their supplier **codes of conduct** regarding **social responsibility**, which are often based on ILO labour standards.

Tips:

- Discuss with (potential) buyers whether they would be interested in certified sustainable natural ingredients of the above standards.
- If you choose to obtain a certificate for organic production, find out more about [Organic production and labelling](#).
- Dedicate the processing plant to the exclusive production of organic ingredients. If this is not possible, ensure thorough cleansing of machinery and equipment at all times.
- Consult the [Standards Map database](#) for different sustainability and organic standards.
- For more information on responsible business practices, refer to the [UN Global Compact](#) and ISO 26000 as guidance, and use the [SEDEX](#) online database, where members can share information on ethical and responsible practices. You can also use SEDEX to prepare for possible audits/questions from your buyers.

Quality and food safety management: In addition to the mandatory HACCP standard, EU food industries increasingly demand compliance with more comprehensive food safety standards (food safety management systems), as well as quality safety management as specified in [ISO 9001:2008](#) (required for health ingredients). This mostly concerns large retailers and (private label) manufacturers, most notably for food supplements. Examples include the [International Food Standard \(IFS\)](#), [ISO 22000](#) (food safety) and [ISO 31.000](#) (risk management).

Tips:

- Consider carefully whether to comply with the above standards and certifications. Verify whether your buyer truly demands compliance, whether compliance will facilitate market access or offer you a better price, or whether compliance will benefit your company's supply security or internal processes. In the case of food safety standards, it is also important to ascertain whether you can gain your buyer's trust in another way.
- Stay up to date with information on food safety standards by checking news items published on the [Codex Alimentarius](#) and [HACCEUROPA websites](#).

What competition do I face on the European market for anti-obesity products?

Synthetic alternatives

The prescription and use of *synthetic pharmaceuticals* to treat obesity (e.g. lipid regulators, appetite suppressants, etc.) is very common in the European market, but this pattern is gradually diminishing. Not only has Europe recently banned drugs such as Reductil, but consumer interest in natural alternatives is also on the rise owing to more moderate side-effects and greater affordability.

At the same time, *protein-based products* represent strong competition. In addition to supporting lean muscle mass, these products are known to create a sensation of satiety while possessing a low amount of carbohydrates and fats. The global protein supplements market grew significantly in 2012, with sales increasing by 9% annually to around €1.33 billion.

Tip:

- Please refer to [CBI Competition](#) and CBI Top 10 Tips for doing business for more information.

Existing natural alternatives

There are several natural anti-obesity alternatives which compete with botanicals:

- Supplements or yoghurt drinks containing *Lactobacillus acidophilus* and Bifido-bacterium BB-12 (bacterial cultures which support the digestive system) are strong competitors in the probiotic market.
- Flaxseed oil (as a supplement) is another popular choice in preventing and treating obesity, and it also helps support the digestive system and, more directly, keeps blood cholesterol levels under control. The oil has significant marketing appeal owing to its high omega-3 fatty acid content.
- Consumers are also using fruits as a weapon in their armoury in the fight against obesity. One such example is the combination of different fruits, such as figs, tamarinds, etc., as a supplement (e.g. in cubes), these being used for their laxative properties.

Tip:

- It is up to the final manufacturer to market the end product in Europe and to compete within this market. However, you can help manufacturers build their story by documenting and visualising your product and company's unique value proposition (e.g. traditional uses of interest or exotic origins, etc.). This will contribute considerably to your own marketing effort.

Value-adding opportunities when competing in the market

Adding value can be a way of creating your own distinct market profile and making your product more attractive to buyers. You can add value with further processing (e.g. from raw material to extract to final product):

- Opportunities to **add value to raw materials** are often not fully exploited; proper post-harvest processing (sorting, grading) and proper documentation can both lead to you obtaining a higher price.
- Developing country producers are moving **beyond raw material** towards the export of extracts. Processing raw materials into essential oils is guided by the existence of standards, and buyer demands are well understood. In contrast, it is more difficult to come to a common understanding on quality in terms of many herbal extracts. Thus many EU buyers prefer to import raw materials, even if their suppliers would prefer to export extracts (to other markets).
- **Finished products** for anti-obesity on the EU market are beyond the scope of most companies in developing countries, taking into consideration product development, market authorisation and marketing costs.

Tips:

- Align quality improvements to your product with buyers' requirements (specifications) and their willingness to pay for them. Quality improvements can be costly, and you need to ensure the potential exists for getting an adequate return on investment.
- Although marketing final products is probably beyond your scope, there Determine your option to market simple finished products such as herbal teas. South-South trade also offers good opportunities for this type of final product, as the marketing is relatively simple and well established.

You can also add value by certifying your company according to social and environmental sustainability principles:

- In **food supplements** the value of certification depends on the positioning of the producer and product. The opportunities for certification increase if the product is positioned more as a food-type product rather than a medicinal-type product. In addition, producers with a sustainable company image place more value on certification of the ingredients in their food supplements.

Tip:

- Verify your buyers' interest in certified ingredients:
 - Organic certification also acts as a quality control system and can help to improve your quality image.
 - Fair Trade and FairWild certification can help indicate to your buyer that the production of ingredients is generating rural income and does not harm local communities (this could jeopardise the buyer's image).
 - Certification demonstrating sustainable sourcing (e.g. FairWild) can help show potential buyers that you could be a reliable future partner.

Tips:

What do the trade channels and interesting market segments look like in Europe for anti-obesity products?

Market segments

Anti-obesity products are marketed as **food supplements**. An increasing number of food supplements in Europe are being marketed to fight obesity. Consumers are increasingly interested in herbal solutions, especially when they are replacing synthetic products. Product development and innovation is difficult but viable for this segment.

Although obesity is an increasingly established indication across Europe, not all supplement producers have products relating to it, as it does not fit their "healthy living" corporate identity. However, many supplement producers have anti-obesity products in their portfolios, often based on established recipes. They are not marketed in respect of "weight loss" but in terms of a healthy metabolism and appetite, and maintaining weight. Several producers are being (increasingly) innovative in adding new ingredients that are unfamiliar as supplements in Europe. In general, the UK and France are more vibrant in terms of product introductions than Germany or Italy.

Market channels

Regarding established species for food supplements, trade relations focus on maximising supply security and reducing costs. In comparison, new ingredients call more strongly for collaboration.

Tips:

- Look at local practices: what do local people use to increase metabolic activity/suppress the appetite? Build up files on traditional use, and support this with clinical tests. Such information can be used when approaching European traders, ingredient processors and manufacturers.
- Consider whether you would be able to become a preferred supplier for larger players (larger volumes, very high expectations in terms of service delivery).
- For tips on finding buyers, have a look at the CBI Module Finding Buyers. Use your knowledge of product development activity and potential for marketing your product more specifically to the right buyer.
- Please refer to [CBI Market Channels and Segments](#), where the various players at the various levels of the value chain are discussed in more depth. You are also provided with an overview of the key market characteristics and trends for the food supplements segment.

Useful sources

Visiting and, above all, participating in trade fairs are highly recommended as among the most efficient methods of testing market receptiveness, obtaining market information and finding prospective business partners. The most relevant trade fairs in Europe for exporters of natural health ingredients are:

- [SANA](#) in Bologna, Italy.
- [Hi/Ni](#) (Health ingredients/Natural ingredients): Travelling trade fair.
- [Fi/Ni](#): Food ingredients/Natural ingredients travelling trade fair.
- [Biofach](#) in Nuremberg, Germany (for organic producers).
- [Vitafoods](#) in Geneva, Switzerland.
- [CPHI](#) is more focused on the pharmaceutical market, but larger natural extract companies also exhibit at this fair in a dedicated natural extracts zone.
- [Anuga](#) in Cologne, Germany, is a food and beverages fair but now also has a dedicated “Wellfood” department, including food supplements, functional food and medicine.

Trade press/news

- [Nutra Ingredients](#): News on supplements and nutrition in Europe.
- [Foodnavigator](#): Science and nutrition research, product news, newsletter, health and nutritional ingredients.
- [Nutraceuticals World](#): News, buyers’ guide on various herbs and botanicals, knowledge centre and market, peer-reviewed and supplier research.
- [Nutraceuticals Now \(spring issue 2015\)](#): technical review on functional products and ingredients which are defined as disease preventing and/or health promoting in addition to nutritional value.

More information:

CBI market information: Promising EU export markets.

EU Expanding Exports Helpdesk - <http://exporthelp.europa.eu>.

Eurostat - <http://epp.eurostat.ec.europa.eu/newxtweb> - statistical database of the EU. Several queries are possible. For trade, choose ‘EU27 Trade Since 1995 By CN8’.

International Trade Statistics - <http://www.trademap.org> – you have to register.



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