

What is the demand for natural ingredients for health products on the European market?

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Growing consumer preference for natural and alternative treatments makes Europe an interesting market for natural ingredients for health products. The European manufacturing industry is well-established and open to innovation. Growing interest in preventive healthcare also drives the demand for medicinal and aromatic plants, extracts, essential oils, seaweeds and algae, turmeric and ginger. Western European countries with large consumer markets and a long history of self-medication offer the most opportunities for exporters of natural ingredients for health products.

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1. Sector description

In this report, health products are defined as food supplements and herbal medicinal products. Natural ingredients with the most potential in the European health products market include:

- Medicinal and Aromatic Plants (MAPs)
- Essential oils
- Botanical extracts
- Seaweeds and algae (specifically spirulina and chlorella)
- Turmeric
- Ginger

Table 1: Description of the interesting natural ingredients for health products in the European market

Product	Harmonised System (HS) code	Description
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Medicinal and aromatic plants (MAPs)	HS code 121190	MAPs are botanical raw materials that are mostly utilised for therapeutic and aromatic purposes and are as components of health products, as well as cosmetic products. This product group excludes ginseng roots, coca leaf, poppy straw and ephedra. Examples include rosemary and hibiscus.
Essential oils	HS code 330129	Essential oils are extracted from plants through steam or water distillation. HS code 330129 is defined as 'other essential oils' and excludes citrus fruit and mint oils. Examples of essential oils traded under HS code 330129 are patchouli, frankincense and ylang-ylang.
Botanical extracts	HS code 130219	Botanical extracts are derived from processing MAPs, herbs or spices, using a solvent. Generally, the original components of the plants are not changed, though botanical extracts have a higher concentration of actives or nutrients. HS code 130219 excludes liquorice, hops and opium. Examples of botanical extracts include aloe vera extract and ginseng extract.
Seaweeds and other algae fit for human consumption	HS code 121221	Seaweed refers to a number of species of macroscopic, multicellular and marine algae which grow along rocky shorelines around the world. Seaweed varies in colour from red to black. Most edible seaweed is marine seaweed, which is part of many coastal cuisines. Examples of popular microalgae on the European market are spirulina and chlorella.
Turmeric	HS code 091030	Turmeric (<i>Curcuma longa</i>) is a species of the Curcuma genus from the family of Zingiberaceae (commonly known as the ginger family of flowering plants). The active substance of turmeric, curcumin, has multiple therapeutic properties such as anti-inflammatory and antioxidant and helps prevent cancer.

Ginger	HS code 091012 (crushed ginger)	Ginger is the irregularly shaped root (rhizome) of the ginger plant (<i>Zingiber officinale</i>). The plant is cultivated in the tropics. Ginger is used as both a spice in the food market and in food supplements and herbal medicinal products.
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Source: ProFound, 2024

It is important to note that most of the HS codes mentioned above are also important HS codes for ingredients in the food and/or cosmetics industry. Therefore, in many cases the specific use of natural ingredients in health products is hidden in the overall data on imports. Despite these limitations regarding trade data, it is still possible to draw certain conclusions about European market demand and gain useful insights to help make decisions.

2. What makes Europe an interesting market for natural ingredients for health products?

Europe is a significant producer, importer, manufacturer and consumer of health products. It is an important market for food supplements and herbal medicinal products. The market is expected to grow as consumer interest in natural health options continues to rise. As part of the ever-developing market requirements, sustainable sourcing is increasingly important on the European market.

Strong and growing European demand for health products

Natural ingredients for health products are mainly used in food supplements and herbal medicinal products, and in alternative medicine. Though data on the total market size for these segments is limited, available market research predicts a strong and growing interest in alternative medicine and related demand in Europe. This translates into opportunities for exporters of ingredients used in such final products.

In 2023, the [European market for food supplements was valued at USD 40.7 billion](#). Between 2024 and 2030, the market is expected to grow at an annual rate of 7.0%. According to the sector association Food Supplements Europe, about [52% of European consumers](#) take supplements to maintain their overall health.

Data on the market for herbal medicinal products is limited. Moreover, available market research often uses different definitions for this sector, which sometimes includes herbal food supplements or cosmetic products. Globe Newswire predicts that the [European herbal medicine market will reach USD 35.8 billion](#) by 2026, becoming the second-largest market for herbal medicine globally following the Asia-Pacific market.

Europe is the largest market for complementary and alternative medicine (CAM). In 2023, the European CAM market was [estimated to have a value of USD 49.2 billion](#). Examples of CAM are acupuncture, ayurveda, Chinese medicine, osteopathy and homeopathy. The global complementary and alternative medicine market is expected to grow at an annual rate of over 25% between 2024 and 2030. The [United Kingdom \(UK\) dominates the European CAM industry](#), while CAM treatments [are also very popular in Germany and Switzerland](#). This is partly because some CAM treatments are covered by health insurance. Other reasons for a higher demand for CAM therapies are a long history of using CAM therapies in the region, as well as positive attitudes that favour natural and holistic approaches to health and healing.

Consumer interest in natural health self-care products expected to grow further

For several years, consumer interest in natural health products has been growing. There has been a growing awareness of the benefits of natural remedies. Other factors driving demand include a [growing aging population](#) and the rising interest in preventive healthcare. Consumers increasingly seek products that support their overall well-being and help prevent or mitigate health issues.

The [European herbal supplements market was valued at USD 7.5 billion](#) in 2023. Between 2024 and 2030, the market is expected to grow at an average annual rate of 5.2%, reaching USD 10.8 billion in 2030. Single botanical products hold a large share of the market. Certain botanicals benefit from high consumer awareness, such as turmeric, ginger, ashwagandha and echinacea.

The drive amongst European consumers to find new forms of disease prevention and treatment is contributing to growing awareness about self-care and wellness products. This, coupled with the increasing distribution of medicines, is driving growth in the over-the-counter (OTC) drugs market in Europe. At present, more than [4,000 health products are available OTC](#) and more than 200 active pharmaceutical ingredients are available without prescription in Europe. This is leading to increasing demand for food supplements as well as herbal medicinal products, which are mainly sold OTC.

The [European OTC drug market was worth an estimated USD 60.2 billion](#) in 2023. This market is expected to grow at an average annual rate of 8.1%, to reach over USD 96 billion in 2029. Factors behind this growth are convenience, easy accessibility and the low costs of OTC drugs. Moreover, governments in the EU are attempting to shift costs to customers to lower the resource costs for doctors and pharmacists.

According to the [Association of the European Self-Care Industry](#) (AESGP), using self-care products reduces the strain on social security systems and healthcare costs. Over-the-counter medicines also contribute positively to public health and improve the prevention of illnesses.

AESGP indicates that the [use of self-care products varies across Europe](#). Countries with high access and uptake of self-care products include Germany, the UK, Belgium, Poland and Finland. Examples of countries where use of self-care products is low are France, Spain, Austria and Italy.

Due to increasing consumer awareness about health prevention, the share of OTC medications is expected to continue to grow in the future. This trend opens an opportunity for suppliers of natural ingredients for health products in developing countries. [Novartis AG](#), [Sanofi](#) and [Bayer AG](#) are important companies in this segment.

Europe is a major importer of natural ingredients

To meet demand from its large industry and growing consumer base, Europe imports large volumes of natural ingredients. The share of European imports in 2023, compared to global imports, is as follows:

- MAPs: Europe accounts for 24% of the global import volume (219 thousand tonnes) and 38% of the global import value, totalling nearly €1.3 billion.
- Essential oils: Europe represents 33% of the global import volume (18 thousand tonnes) and 45% of the global import value at €891 million.
- Botanical extracts: Europe represents 29% of the global import volume (over 87 thousand tonnes) and 35% of the global import value, reaching nearly €1.2 billion.
- Seaweeds: Europe accounts for 7.6% of the global import volume (24 thousand tonnes) and 11% of the global import value at €112 million.
- Turmeric: Europe represents 11% of the global import volume (26 thousand tonnes) and 21% of the global import value at €64.9 million.
- Ginger: Europe represents 21% of the global import volume (18 thousand tonnes) and 34% of the global

import value at €46.2 million.

The total European import volume of many natural ingredients for health products has increased over the last five years. Imports of botanical extracts grew at an average annual rate of 6.4% between 2019 and 2023, with the import value increasing by 4.6% annually. European import volumes of MAPs (0.6%), ginger (5.7%) and seaweeds (7.1%) also grew during this period. Conversely, European import volumes of turmeric and essential oils saw a slight annual decline of 1.5% each. The import value of essential oils declined by 0.9% over the same period, while import values for turmeric increased by 2.9%.

Source: ITC Trade Map, 2024

Emerging market economies are important suppliers to Europe

Emerging markets play a large role in the supply of various ingredients to Europe. This includes:

- MAPs: Europe sourced 47% of the import value from emerging markets, up from 44% in 2019. The largest emerging market suppliers to Europe were India, Egypt, China, Morocco and Kenya.
- Essential oils: About 48% of the import value came from emerging markets, slightly down from 49% in 2019. Key emerging market suppliers include China, Indonesia, India, Türkiye and Morocco.
- Botanical extracts: Imports from emerging markets reached 40% of the total import value, a notable increase from 31% in 2019. Key emerging market suppliers to Europe include China, India, Vietnam, Mexico and Madagascar.
- Seaweeds: About 60% of the import value was sourced from emerging markets, compared to 33% in 2019. The largest emerging market suppliers to Europe were South Korea, Indonesia, the Philippines, Malaysia and Ecuador.
- Turmeric: About 70% of the import value was sourced directly from emerging markets, a decline from 77% in 2019. The largest emerging market suppliers to Europe were India, Peru, Madagascar, Thailand and Sri Lanka.
- Ginger: 67% of the import value came from emerging markets, a slight drop from 68% in 2019. Key emerging market suppliers to Europe include China, Nigeria, India, Vietnam and Peru.

Thanks to their large container ports and pivotal roles in international trade, the Netherlands, Germany and Belgium are key trade hubs for distribution to other European countries for many of these ingredients.

Europe is a large market for organic ingredients

As more and more people adopt healthier lifestyles, sales of natural and clean-label health products go up. Natural and organic health products are perceived as safer and high-quality alternatives. A survey on behalf of Food Supplements Europe shows that [56% of respondents consider the organic, natural or non-GMO labelling](#) to be of importance when purchasing supplements.

This coincides with a growing demand for organic products. Europe holds the position of the second-largest market for organic products globally, after the United States. [Retail sales of organic products in Europe](#) reached a total value of €53.1 billion in 2022. Germany stands out as the largest market with sales reaching €15.3 billion. In 2022, the organic food and beverage market in Europe experienced a decline of 2.2%, for the first time after years of consistent growth. This downturn was primarily driven by high inflation, which has reduced the purchasing power of European consumers. However, the organic market is expected to recover and continue its growth. In Germany, for instance, the [demand for organic products was already slowly growing again in 2023](#).

Buyers have indicated that for specific natural ingredients for health products, such as moringa and baobab,

there is hardly a market for non-organic certified. Nevertheless, the share of organic in the total natural ingredients for health products market is expected to stay small, although there are no specific statistics available to confirm this.

Organic certification is typically more common for food supplements than for herbal medicinal products, which cannot be labelled as organic as a finished product. Opportunities for certification increase if a food supplement is positioned more as a food-type product, rather than as a medicinal-type product. Moreover, buyers view organic certification as proof of quality and traceability.

Tips:

Explore the potential of the food-supplement market. In Europe, natural ingredients are used in much larger quantities in the supplements sector and the complementary and alternative medicine sector than in generic medicine, which mainly uses synthetic ingredients.

Inform buyers of how your ingredients can help consumers to improve their health and well-being. Focus on the nutritional or health aspects of your ingredients when supplying active ingredients. Do not make medical claims. More information on [EU regulations regarding claims](#) can be found on the European Commission website.

See the CBI study on [buyer requirements for natural ingredients for health products](#), which provides an overview of regulations for exporting natural ingredients for health products to Europe, as well as information on organic certification.

Read the CBI study on [which trends offer opportunities or pose threats in the European natural ingredients for health product markets](#). This study will give you useful information about the European health products market as well as information to help increase your chances of market access.

See the CBI studies on [moringa](#) and [baobab](#) for more information on the European market potential of these products.

3. Which European markets offer most opportunities for natural ingredients for health products?

Western European countries such as Germany, France, Italy, the UK, Spain and the Netherlands are the most attractive countries for suppliers of natural ingredients for health products. These countries have different characteristics that make them interesting. They generally have well-established processing industries, import significant volumes of natural ingredients, and offer dynamic consumer markets with strong demand for herbal medicinal products and food supplements. Large health product manufacturers using natural ingredients are also located in these countries.

The figure below indicates the leading importers per product group included in this study.

Source: ITC Trade Map, 2024

The table below shows an overview of characteristics on the selected markets.

Table 2: Characteristics of leading European markets for natural ingredients for health products

	Production	Processing	Trade	Herbal medicinal products market	Food supplements market
Germany	Large EU producer of MAPs	Largest extraction industry	Largest importer, highest share of imports from emerging markets	Largest market in the EU, also interest in aromatherapy	Large market
France	Large EU producer of MAPs (for use in cosmetics)	Strong extraction industry	Main importer of MAPs/extracts	Large market in the EU, also interest in aromatherapy	Large market
Italy	Large EU producer of MAPs	Strong extraction industry	Main importer MAPs/extracts	Medium-sized market	Largest market EU: limited herbal
UK	Small producer of MAPs	Medium-sized manufacturing industry	Strong trader in MAPs/extracts	Mid-sized market, relatively large in CAM	Large market, focus on multi-herb products
Spain	Large EU producer of MAPs	Strong extraction industry	Important and growing importer of MAPs for processing industry	Medium-sized market	Large market
The Netherlands	Limited production of MAPs	Limited extraction industry	Important trade hub for natural ingredients, large share of imports from developing countries	Medium-sized market	Medium-sized market

Source: ProFound, 2024

Germany at the centre of herbal medicinal products in Europe

Germany has the largest consumer market in Europe and consumers are increasingly becoming more health conscious. In combination with growing consumer interest in plant-based products and a strong extraction industry, the German market offers opportunities for exporters of natural ingredients for health products.

Germany has a long tradition of using herbal medicinal products, taking up a large part of the German pharmaceutical market, especially in self-medication products. In 2023, German sales of over-the-counter herbal and homeopathic medicines [amounted to €2.3 billion](#). This represents 29% of the total Germany over-the-counter medicine market.

The [German food-supplement market was worth an estimated €1.8 billion](#) in 2023, having grown by 4.8% since 2022. The market is expected to reach €2.1 billion in 2028. Germany has the second-largest food supplements market in Europe, after Italy. The percentage of people taking food supplements in Germany rose from 60% in 2021 to 65% in 2023. This trend is expected to continue in the coming years as German consumers become more aware of the natural benefits of these products.

Of the food supplements consumed, herbs or herbal products make up for approximately 18% of overall consumption, and herbal supplements such as algae 15%. Still, the [most common supplements in 2023](#) were vitamins (61%), minerals (36%) and proteins (25%).

The cultivation of MAPs has a long tradition in Germany, especially in the eastern parts of the country. Several German MAP producers are able to compete on the market, particularly with regard to ingredients for herbal medicinal products owing to the high quality and excellent documentation they provide. Examples of MAP producers in Germany include [Pharmaplant](#) and [HEGO Heilkräuter Gorges GmbH & Co.KG](#).

There is a strong domestic demand in Germany for both raw materials and more processed ingredients for industrial use in order to supply national and international markets with health products. In terms of trade, Germany is one of the largest importers of various natural ingredients for health products, such as MAPs. These raw materials are used in Germany's extensive processing and manufacturing industry. Examples of German importers are [MartinBauer](#) and [Worlée](#).

France focuses on herbal health products

France is an attractive market for exporters of natural ingredients for health products. This is a large and growing consumer market where consumers value plant-based food supplements. Traditionally, French consumers rely on prescription medication and food supplements for their health needs. As a result, France is the third-largest European market for food supplements.

In 2023, the [French food supplements market was worth €2.7 billion](#), up 3.0% compared to the year before. The supplements market in France is expected to [grow at an average annual rate of 6.1% from 2023 to 2028](#). Growth is partly driven by the popularity of online distribution channels. Online sales grew by 2% from 2022 to 2023.

About [72% of French people consider that food supplements are effective](#) in combating health issues. Some of the main [complaints for which supplements were taken in 2023](#) were tiredness (52%), stress (46%) and bad sleep quality (46%). The main reasons for taking supplements are to strengthen the immune system (48%), to be in good shape (44%), to sleep better (36%) and to reduce stress (31%).

Regarding herbal medicinal products, traditional western herbal medicinal products, especially homeopathic medicines, dominate the French herbal medicinal products market. The focus of these products is mainly on preventive health. France is one of the main markets for herbal medicinal products in Europe, surpassed only by Germany. However, up-to-date market information is limited.

France has a substantial production of MAPs, mostly for the essential oil and cosmetics industries and it is the largest EU importer of essential oils. The production of MAPs relies on a growing number of French producers, which are typically private agricultural companies or producers organised in cooperatives. Between 2018 and 2023 [the number of producers grew by 25%](#). This growth is driven by strong demand from domestic companies and significant valorisation of MAPs. However, even with a growing number of producers and an expanded

cultivation area, demand remains higher than agricultural supply. Lemon balm, chestnut and mountain arnica are amongst [the main medicinal plants cultivated in France](#), while basil, thyme, coriander and green mint are the most cultivated aromatic plants in the country.

France has a large extraction sector which supplies the herbal medicinal product, food supplement and cosmetics sectors. French manufacturers produce high-quality consumer products at a competitive price, supported by documentation and market communication. The emphasis on quality ensures consumer satisfaction and trust in the products. Customer advice plays an important role in the sales of medicinal products in France. Examples of French health product manufacturers include [Laboratoires Boiron](#), [Arkopharma](#) and [Phytea](#).

Italy is Europe's largest food supplement market

Italy is the [largest food supplement market in Europe](#). About 73% of Italians used supplements at least once in 2023. The sector in Italy amounted to over €4.5 billion in 2023. Pharmacies are the main distribution channels, selling around 78% of food supplements.

The largest health category for which supplements were taken in 2023 includes [supporting the immune system \(30%\)](#) and increasing energy intake (26%). Over 48% of Italians consult a doctor before buying supplements, while 36% seek advice from a pharmacist. Probiotics were the largest supplement sales category in Italy, with [sales exceeding €537 million in 2023](#), followed by minerals at €335 million.

According to a report by the [Italian Federation of Herbal Medicine Industries](#), the Italian herbal product market amounted to €2.9 billion in 2022, which represents an increase of 16% from 2019. This is a share of around 11% of the country's total pharmaceutical market. However, this figure includes both herbal medicinal products and supplements. In 2023, [76% of Italians purchased herbal and plant-derived products](#) for health and personal care. About 67% of consumers indicated that herbalist shops are their preferred purchasing channels. Most customers go to these shops to buy herbal teas, body and hair care products and supplements with natural plant ingredients.

Products with natural active ingredients are increasingly used by Italian consumers, especially for mild health issues. Popular ingredients include passionflower, lemon balm, propolis, fermented red rice yeast, arnica, aloe and calendula. In general, Italian consumers have a long history of using locally-produced botanicals for herbal medicinal products and traditional medicine.

The country is still an interesting destination for exporters from emerging markets. It is the second-largest importer of botanical extracts in Europe. Regarding MAPs, it is the sixth-largest importer, because Italy itself is a large producer of MAPs. Overall, Italy demands high volumes of natural ingredients to serve its strong natural health product manufacturing industry and its large consumer market.

The UK increasingly imports natural ingredients directly from developing countries

The UK is a growing market with a strong demand for plant-based products that support general health. Additional opportunities lie in the dependence on imports of natural ingredients, because there is limited local production.

The [UK food supplements market was worth USD 780 million](#) (around €710 million) in 2024. It is estimated that the market will grow at an average annual rate of 6.5%, reaching USD 1.7 billion in 2029. This growth is fuelled by rising health awareness, an ageing population and increasing interest in fitness and sports nutrition amongst younger people. About two-thirds of UK consumers consume supplements to address nutritional deficiencies and manage specific health conditions.

UK consumers increasingly look for natural and clean products, a trend that is reflected in other sectors, such as the food and beverage and cosmetics industries. Key [demographics for herbal supplements](#) are middle-aged and older adults, particularly women, with higher education levels and more disposable income. According to Kantar, herbal supplements accounted for [19.6% of total supplement sales](#) in 2020.

The UK has a strong herbal medicinal products sector, with a relatively strong position held by Traditional Chinese Medicine (TCM) and Ayurvedic medicine, compared to other European countries. This offers opportunities for ingredients commonly used in these traditional medicine systems, such as [brahmi](#), [ashwagandha](#) and [tulsi](#). Aromatherapy is also popular in the UK and is used for relaxation or preventative care rather than as a form of medication. Examples of brands with a wide portfolio of aromatherapy products (essential oils) on the UK market are [Oshadhi](#) and [doTERRA](#).

With limited local production, the UK relies on imports of natural ingredients. Brexit (UK's exit from the European Union in 2020) seemed to have a positive effect on the UK's direct import of natural ingredients from emerging markets. While total UK imports increased for MAPs during the period from 2019 to 2023, direct imports from emerging markets almost doubled in the same time period. For extracts, total UK imports dropped by half during the 2019-2023 period, while imports from emerging market economies remained stable.

The UK's extraction industry is well developed, but considerably smaller than its counterparts in France, Italy and Germany. The industry mostly consists of small extraction companies. The UK also includes processors that import extracts from developing countries to complement their own product range. These imported extracts are sometimes reprocessed, but they can also be sold directly to manufacturers.

Spain's growing food supplement market and strong processing industry

The [Spanish food supplement market is the fifth-largest in Europe](#). Consumption of dietary supplements in Spain amounted to over €2 billion in 2023. About [75% of the Spanish population reported to have consumed some type of supplement in 2023](#). In terms of growth, it is the third-fastest growing market in Europe. Between 2022 and 2023, the market grew by 5%. This growth is mainly driven by an ageing population, increasing diagnoses of chronic diseases, allergies and intolerances, and the growing interest in improving health. Approximately 59% of respondents in [Spain indicated that organic, natural or GMO-free labelling was important](#) to them when selecting food supplements. This is slightly higher than the European average of 56%.

Spain is an important European producer and processor of MAPs serving local and international demand. Although there are several large players, the sector is fragmented and includes many SMEs focused on processing domestic MAPs. Spain's extraction and natural health product industry is growing, with [new companies entering the food supplements market](#). This leads to a diversified product portfolio and offers opportunities for developing country suppliers of natural ingredients for health products. An example of a raw material distributor for food supplements in Spain is [Nutrifoods](#). [Nutris](#) is an example of a formulator of food supplements in Spain.

The Netherlands as a trade hub for natural ingredients in Europe

Although the Dutch market for herbal medicinal products and food supplements is smaller than other leading markets, the Netherlands is a key trade hub for different types of natural ingredients. This offers an opportunity to exporters from emerging markets.

Annually, [€1.6 billion is spent on supplements in the Netherlands](#), with €1.3 billion allocated to food supplements and €300 million to herbal supplements. Around [57% of Dutch consumers take supplements](#). While the percentage of food supplement users has remained steady, the market [grew by €200 million](#) between 2022 and 2023. This growth is attributed to the rise in average annual spending per person on food supplements, which increased from €190 to €232. Similarly, spending on herbal supplements saw a rise, climbing from €151 to €181.

The Netherlands is an important entry point for various natural ingredients from emerging markets. The country's imports of botanical extracts and turmeric in 2023 came almost exclusively from developing countries, at 94% and 88% respectively. Moreover, Dutch imports of botanical extracts have been growing at a much higher rate than the EU average in the last five years.

The important role of the Netherlands as an entry point of ingredients into Europe is due to the country's re-exports to other European countries as well as to the strong ingredient-processing industry and the presence of importers/distributors that cover multiple countries. The Netherlands uses technology and know-how in the processing and formulation of ingredients, making it an interesting destination to suppliers from emerging markets. An example of a trading company with a presence in the Netherlands is [Caldic](#). This company is active in the food, pharmaceutical, personal care and industrial formulations market. Other examples of companies active in the import of MAPs and botanical extracts for the health market are [Health Ingredients Trading](#) and [VNK Herbs](#).

Tips:

Determine which market offers the best opportunities for your company and products. You can get market information from sector associations, from the online product portfolios of distributors and retailers, or by visiting trade fairs.

Do your own market research. Review [CBI market studies on the natural ingredients for health products sector](#) and individual products or product groups. Or use online trade databases such as [ITC Trade Map](#) or [Access2Markets](#) to download trade data for your product categories.

See the [CBI tips for finding buyers in the natural ingredients for health products sector](#), as it provides practical guidance on finding European buyers in the European market.

Target health product companies in Western Europe. These countries are the largest consumers and producers of herbal medicinal products and food supplements. Consumers in these countries are also open to various types of complementary and alternative medicine.

4. Which products from developing countries have the most potential in the European natural ingredients for health products market?

European demand for natural ingredients for health products has been growing for years. Brands are increasingly innovating within the sector, both in final products and in terms of ingredients that support consumer health. A growing consumer demand for natural health products and botanicals creates opportunities for natural ingredients for food supplements and herbal medicinal products.

MAPs, essential oils, botanical extracts, seaweeds and algae products, turmeric and ginger, are popular natural ingredients in the European market with an important or growing role for emerging market suppliers. The food supplement sector is trend-sensitive, which could lead to the risk that popularity of specific natural ingredients may not last. The [herbal medicinal sector has more strict quality requirements](#), but buyers in this sector are more likely to stay with the same supplier.

Medicinal and aromatic plants

The range of MAPs used for healthcare is very large. Their potential use is even larger but is limited in practice by legislation. Worldwide, between 50,000 and 70,000 plants are used in traditional medicinal systems, and

around 2,000 plants are used in significant volumes in the EU. Moreover, MAPs are also used in other markets, such as cosmetic products.

In 2023, European imports of MAPs amounted to 219 thousand tonnes at a value of €1.3 billion. About 47% of the import value came from emerging markets in 2023, up from 44% in 2019. This indicates that emerging markets are an increasingly important source of MAPs for Europe. The total European import volume of MAPs increased slightly by an average annual rate of 0.6% from 2019 to 2023, while the respective import value of MAPs increased by 8.0% annually.

Germany is the largest importer of MAPs in Europe, followed by Spain and France. Together, these three countries accounted for over half of the MAP import volume in 2023. These countries, as well as Italy, have considerable processing industries, for the health product market but also for other industries such as cosmetics. German traders also play a role in distributing MAPs worldwide. The same holds for natural health ingredients and extraction companies in Germany, Italy and France, which supply healthcare companies across the globe.

The main emerging market suppliers of MAPs to Europe are India, Egypt, China, Morocco and Kenya. In 2023, these countries accounted for 61% of Europe's MAPs imports from emerging market suppliers. China and India are large producers of a wide range of botanicals. Morocco and Egypt supply various Mediterranean MAPs and herbs, such as German chamomile (*Matricaria chamomilla*), thyme (*Thymus vulgaris*) and rosemary (*Rosmarinus officinalis*).

Source: ITC Trade Map, 2024

European demand is focused on most commonly used MAPs, specifically those used in western herbal medicinal products. There is, however, some demand for less common species with interesting active properties. Each product has to be accompanied by technical documentation and a documented history of use. The demand for MAPs mostly stems from the food supplements market as well as the herbal tea segment.

Quality and microbial safety of MAPs is important to European buyers. At the same time, consumers are interested in organic-certified health products that support a healthy lifestyle, driving demand for organic MAPs. For example, research by the International Horticulture Congress shows that [prices have been increasing for organic MAPs](#), especially for plants that are certified by a European or French quality mark, or by a protected geographical indication.

European MAP suppliers, especially in Western European countries, have a strong position in organic and well-documented MAPs, and many suppliers enjoy close relationships with buyers. Sustainable wild collection remains important in Europe, especially in Eastern European countries, which are a significant competitive threat to many emerging economy producers of temperate (and Mediterranean) species. Most tropical and subtropical plant species are not produced in Europe for climatic reasons. This offers opportunities for emerging economy exporters that handle those species.

Several issues historically affect the MAPs sector. One of the outstanding issues is [the overharvesting of MAPs](#), which puts pressure on wild plant populations. This can lead to an increase in threatened plant species worldwide. In addition, accurate identification of species and variation is often a problem. Largely unregulated and non-transparent supply chains limit the growth of the MAPs sector.

Tips:

Show sustainable wild collection by conducting a resource assessment. See the [CITES International standard for sustainable wild collection of medicinal and aromatic plants](#) for more information. Based

on the assessment's outcomes, implement a resource management system. Document your processes to make sure your price can be a reflection of your efforts.

See the [European Union herbal monographs](#) for more information on properties and applications of medicinal and aromatic plants.

See the [CBI study on exporting immune-boosting botanicals to the European market](#), for more information on MAPs and their potential in this specific market segment.

For more information on European herb production, check out the website of the [European Herb Growers Association](#). Here you can also download the association's [good agricultural and collection practices](#) aimed at improving the quality and safety of MAPs.

Essential oils

Europe is the leading market for essential oils globally. The European market for essential oils is expected to reach a [valuation of almost USD 8.9 billion by 2028](#), with an annual growth rate of 9.1% from 2020 to 2028. The food, beverage, and cosmetics industries make up the largest share of essential oil demand, but a growing consumer interest and awareness of aromatherapy is expected to drive demand for essential oils in the coming years. In Europe, essential oils for aromatherapy are often regulated as cosmetic products.

Although North America dominates the global aromatherapy market, Europe is expected to show faster growth in the coming years. The European aromatherapy market is expected to grow at an annual rate of [10% from 2023 to 2030](#). Increasing awareness of mental health issues and the growing preference for natural alternative treatments to pharmaceutical drugs are expected to drive the demand for aromatherapy products in Europe. Essential oils have a wide range of properties such as stress-relieving, anti-bacterial, soothing, refreshing and invigorating properties. Eucalyptus, tea tree, jasmine and ylang-ylang oil are popular oils used in aromatherapy.

The European import volume of essential oils amounted to nearly 18 thousand tonnes in 2023, at a value of €891 million. Between 2019 and 2023, the European import volume declined at an average annual rate of 1.5%, while value declined by 0.9%. This data excludes mint and citrus oils which are more commonly used in the food and beverage industries.

France, Germany, the UK, Spain, Italy and the Netherlands were the main European importers of essential oils in 2023. France is the largest importer of essential oils, which are also used in its considerable cosmetics and fragrances industries. These European countries have strong manufacturing industries, a growing demand for aromatherapy, and they play an important role in the imports and re-exports of essential oils.

Emerging economy market suppliers play an important role in the supplies of essential oils. Between 2019 and 2023, about 48% of the essential oils import value from Europe came from these markets, similar to its share in 2019 (49%). The largest suppliers include China, Indonesia, India, Türkiye and Morocco. In 2023, these five countries accounted for 61% of EU imports from emerging markets.

Source: ITC Trade Map, 2024

Plants for essential oil production, like rose and clary sage, are grown in Europe. Germany and France are amongst the largest European producers of essential oils, followed by Italy, Spain and Bulgaria. Suppliers in emerging market economies should focus on niche essential oils which cannot be grown in Europe, like frankincense and ylang-ylang.

Adulteration and safety concerns are common issues for the essential oils market. Essential oils are diluted with

cheaper or synthetic products. Moreover, sustainable sourcing is key in essential oil production. European buyers value transparent and traceable supply chains, especially for wild-collected raw materials for essential oils.

An example of a European company active in the essential oils sector is [Alteya Organics](#) (Bulgaria). They grow and harvest roses and lavender, distilling organic essential oils and flower waters using generations-old recipes. Their range includes organic plant extracts, oils and herbs from the Balkan regions as well as beyond, as their portfolio includes exotic essential oils such as patchouli and ylang-ylang. Alteya Organics supplies ingredients for the personal care, cosmetics and perfumery industries in Asia, Europe, North America and Australia.

Figure 5: Examples of essential oil products in the European market



Source: [Alteya Organics](#), 2024

Tips:

See the CBI studies on [exporting essential oils to Europe](#) for information on essential oils in the European health product market.

See the CBI study on [buyer requirements for natural ingredients for cosmetic products](#) for more information on requirements for essential oils in Europe.

Visit the website of the [European Federation of Associations of Essential Oils](#) for more information on European legislation for essential oils. The website also provides an overview of [member associations and member companies in Europe](#).

Look up companies that sell aromatherapy products in Europe to see which marketing stories and health claims they use. Visit websites from companies like [Puresentiel](#) (France) and [Primavera Life](#) (Germany).

Make your supply chain transparent for European buyers. Use appropriate tracking and tracing or other audit and certification systems to show where your ingredients come from.

Botanical extracts

MAPs are increasingly processed into extracts in the countries of origin or regional processing centres before they are exported to Europe. As more healthcare companies are bypassing European processors that do not offer them added value, direct demand for extracts is on the rise.

The European plant extract market is estimated to have been worth USD 3.7 billion in 2024. It is expected to grow annually by [10.6% in the period from 2024 to 2029](#), reaching USD 6.1 billion. However, health products are not the only industry for extracts, as they are used in the food, beverage and cosmetics industries at considerable levels as well.

In 2023, European imports of botanical extracts amounted to 87 thousand tonnes. Between 2019 and 2023, import volumes by Europe increased at an average annual rate of 6.4%. The Netherlands, Italy, Germany, France and Spain were the leading importers of extracts in Europe in 2023. Together, these countries accounted for 75% of total European extract imports in 2023.

The share of European supplies from emerging market economies grew from 31% to 40% of total imports over the reported period. A large share of these supplies originated from large and well-established extract producers such as China and India. Vietnam increased its exports of extract to the European market, supplying only €711 thousand in 2019, while value reached €53.8 million in 2023. Other suppliers that increased their extract exports over the reported period were Madagascar (average annual increase of 45%), Kenya (21%) and the Dominican Republic (17%).

Certain sub-Saharan African countries, such as Uganda, Ghana and Ivory Coast, have also demonstrated export growth to Europe between 2019 and 2023. However, their export volumes remain much smaller compared to the leading countries mentioned above. European imports from Uganda surged from €2000 in 2019 to €2.4 million in 2023. Similarly, imports from Ghana grew from €1000 to €135,000, while imports from Ivory Coast rose from €22,000 to €111,000 during the same period.

Source: ITC Trade Map, 2024

Europe has a strong extraction industry, which is concentrated in countries with a strong tradition of herbal medicinal products such as Germany, France, Italy, Switzerland, Spain and Poland. The German MAP extraction industry, in particular, is very large and processes and trades the largest share of MAPs in the EU.

Traditionally, the threat of new entrants is lower in extracts than for producers of raw plant materials, due to the high market entry requirements for processed ingredients. The number of suppliers able to provide suitable quality extracts is still much lower than the number of raw material producers.

Innovative supplement manufacturers are typically interested in new safe and proven extracts. These new ingredients will allow them to create a distinct profile for their products in the market. Ingredient innovation can stem from both [new ingredients and a surge in the use of traditional ingredients](#). For instance, there is [RECOVERA](#), a branded ingredient by German plant extracts manufacturer Finzelberg. This is a prickly pear extract that combines cladode and fruit skins of *Opuntia ficus-indica*.

Tips:

Conduct research on the efficacy of your extracts by building research partnerships. Use scientific research and data to support any claims you make, as this gives you credibility.

Review examples of technical documentation for the extracts that you use. For example, see this [Safety Data Sheet for ginseng extract](#) and this [Certificate of Analysis for Echinacea herb extract](#).

Be aware in which segment your extracts end up, as there are big differences in related legislation.

Seaweeds and algae products

Seaweeds are high in nutrients (especially in iodine), although composition differs per species. Seaweeds contain several vitamins and minerals, as well as dietary fibre. Moreover, seaweeds have high levels of antioxidants. Based on these properties, European health products mainly include seaweeds for weight management, general health and wellbeing, as an after-sport food, and additional indications such as immune system support, detox and digestive health. Seaweeds for health are commonly sold as capsules/tablets containing seaweed powder or extracts or pure seaweed powder.

The global seaweed market was valued at USD 17.1 billion in 2023, with Asia leading as the largest producer. It is expected to grow to USD 34.6 billion by 2032. Although the EU is a relatively small producer in the seaweed sector, it stands as one of the largest importers of algae-based products. The European Commission estimates that demand will rise to €9 billion by 2030, with imports to be used in food, cosmetics, pharmaceuticals and biofuels. Spirulina and chlorella are amongst the most popular microalgae used in food supplements.

With respect to spirulina, the global market is predicted to reach USD 1.2 billion by 2030, growing at an average annual rate of nearly 11% between 2023 and 2030. The European spirulina market is expected to grow at an average year-to-year rate of over 13% between 2023 and 2030, reaching nearly USD 157 million by the end of that period. Approximately 70% of the world's spirulina is produced in China, India and Taiwan. Other significant producers include the United States, Thailand, Pakistan, South Africa and Myanmar.

The global chlorella market is expected to grow at an average annual rate of 7.0% between 2023 and 2030, reaching USD 336 million by 2030. The European chlorella market is expected to grow at an average annual rate of 7.2% between 2023 and 2030, amounting to USD 240 million by 2030.

Both chlorella and spirulina have become popular ingredients due to their nutritional benefits. They are both known for their high nutritional value, high protein levels, and antioxidant and anti-inflammatory properties. This makes them increasingly sought after by food supplement manufacturers and health-conscious consumers in Europe.

The total European import volume of seaweeds and other algae fit for human consumption increased at an average annual growth rate of 7.1% between 2019 and 2023, amounting to 24 thousand tonnes in 2023. The largest importers are Denmark and Norway, followed by Germany, Austria, Spain and the UK.

The share of imports from emerging markets increased rapidly between 2019 and 2023. In 2019, about 33% of total imports came from these countries. Their share increased to 60% in 2023. The main emerging market economy suppliers in 2023 were Chile, South Korea, Indonesia, the Philippines and Malaysia.

Source: ITC Trade Map, 2024

In Europe, buyers and consumers are increasingly focused on the sustainability of natural resources and the impact of their purchasing decisions. Chlorella and spirulina align well with this trend as they are environmentally friendly, require no land, fertilisers or fresh water, and they absorb CO₂ from the air. With the EU's goal of carbon neutrality by 2050, algae cultivation is gaining importance and offers alternative employment opportunities for coastal communities as fisheries decline.

Figure 8: Spirulina tablets and powder



Source: Canva, 2022

Tips:

For more information on research into the health benefits of seaweeds and to access scientific resources, you can, for example, check out [Elsevier Science Direct](#) (not for free), [Google Scholar](#) or [Examine.com](#).

If your seaweed is not certified, promote the sustainable and ethical aspects of your production process. Buyers might ask you to support your claims with certification or documentation on your sourcing and sustainability practices. For example, the [Aquaculture Stewardship Council](#) has a sustainable seaweed standard.

See the CBI [studies on exporting chlorella and spirulina to Europe](#), which provide further information about entering the European market and the market potential.

Turmeric

The roots of turmeric contain different active components. The most researched component is [curcumin](#). Turmeric root powder and its extracts are popular in the market due to their anti-inflammatory and antioxidant properties. In European health products, turmeric is mainly used for immune support, digestive health and joint health. The product is also beneficial in supporting liver function, cognition, mental wellbeing and heart health. In herbal medicine, turmeric powder and extracts are authorised for relief of mild digestive problems.

The global curcumin market reached [USD 127 million](#) in 2023. Europe is expected to be the fastest growing region in the world, with an [annual predicted growth of almost 17% between 2023 and 2033](#).

European turmeric import volume amounted to 26 thousand tonnes in 2023. Between 2019 and 2023, the import volume by Europe declined slightly at 1.5% on average per year. Despite this, emerging market economies play a particularly significant role in turmeric supplies. Supplies mainly come from India; the largest supplier of turmeric globally. About 84% of all supplies by emerging markets come from India, while Peru (8.5%) and Madagascar (1.9%) export much smaller volumes to Europe. The Netherlands is the largest turmeric market in Europe, followed by Germany which is an important trade and production hub for turmeric.

Source: ITC Trade Map, 2024

Europe's organic market share of turmeric is still small, but demand is growing. This is largely driven by consumer demand for organic health products, but organic certification can also help you to stand out from competition by demonstrating the traceability of your turmeric. Peru is the main supplier of organic turmeric to Europe. Other suppliers of organic turmeric to the European market include Madagascar, Indonesia, India and Myanmar. The Netherlands, Spain, Germany, the UK, France and Italy are important importers of organic turmeric.

Figure 10: Turmeric



Source: Canva, 2022

Tips:

Determine the concentration of curcumin in your turmeric, because this is linked to its' health benefits. European buyers seek turmeric with higher levels of curcumin content. Work together with a local university or a research institute to test your product.

Consider targeting smaller, fast-growing importers of turmeric, such as importers in Eastern Europe. Although they currently import lower quantities, these can still be sufficient if you are a small

exporter.

For more statistics on *Curcuma longa*, check online sources such as [ITC Trade Map](#) or the [Indian Spices Board](#). Although the Indian Spices Board focuses on spice production, it also lists useful sources for turmeric exporters, such as turmeric exports from India and turmeric cultivation practices. Be aware that trade data does not make a distinction between use for food or use in health products.

If you target the pharmaceutical industry, ensure that you can meet the high regulatory and buyer requirements regarding herbal medicinal products. See the CBI study on [entering the European market for turmeric](#) for more information on requirements.

Consider obtaining certifications that prove your turmeric for health products meets environmental and social standards. Doing so will help you find opportunities in the European market, as the demand for certified turmeric is increasing. You could for instance consider obtaining certification such as [ISO 14001:2015 Environmental management systems](#), as it shows that you meet your environmental responsibilities.

Ginger

Europe is an interesting market for exporters of dried ginger. Though ginger (*Zingiber officinale*) is mainly used in the food industry as a spice and food ingredient, it has good potential for use in health products as well. Globally, the pharmaceutical market is the [second-largest segment for ginger products](#).

Total European imports of ginger amounted to 18 thousand tonnes in 2023. Between 2019 and 2023, imports grew at an average annual rate of 5.7%. The largest importers in 2023 were the UK, Germany, Hungary, the Netherlands and Belgium. The UK and Germany import particularly large volumes of ginger, also from emerging markets, which makes them good focus markets.

In general, emerging market economies play an important role in the supply of ginger. In 2023, about 67% of total imports were supplied by these markets – similar to 68% in 2019. The largest suppliers include China, Nigeria, India and Vietnam.

Source: ITC Trade Map, 2024

Ginger is found in various supplements in the form of tablets, as well as in herbal teas. For use in health products, ground ginger and ginger root extract are used most. Trade data in ginger root extracts are included in figures on botanical extracts trade.

Herbal monographs are available for dried, ground ginger, which permit claims made for herbal medicinal products in regard to digestive health, and to prevent nausea and vomiting in motion sickness. A relatively new application is for its [antioxidant, antimicrobial and antibiotic properties](#) in food supplements that support the immune system. In traditional Chinese and Ayurvedic medicine, ginger was used to help treat common cold and flu-like symptoms.

In addition, ginger is also increasingly used in aromatherapy for which there is a growing demand. In this segment, ginger oil is used for its [stimulating and warming effects](#), to enhance concentration and reduce feelings of stress, anxiety and fatigue. Ginger oil is imported in the product group essential oils not elsewhere specified, see the section on Essential oils above.

Figure 12: Example of European food supplement containing ginger root extract, marketed to help support a healthy digestive system and reduce feelings of travel sickness



Source: [Holland & Barrett](#), 2024

Tips:

Determine your ability to meet requirements for food supplements or find herbal medicinal markets for your ginger. Ginger can be used in a wide variety of products, which all have different legal and buyer requirements.

Check the publication by [Open Trade Gate Sweden on the 2022 European rules regarding organic production and certification](#), to familiarise yourself with the requirements to supply organic-certified products to Europe.

See the CBI study on [exporting dried ginger to Europe](#) for more information on its potential as a spice.

[ProFound - Advisers In Development](#) carried out this study on behalf of CBI.

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