The European market potential for natural ingredients for stress & anxiety products

Last updated:
11 November 2024

The European market for natural ingredients in stress and anxiety products is very promising because of rising global stress levels and growing consumer awareness of stress-related health issues, such as sleep disorders. Europe is the second largest global market for stress relief supplements. Germany, France, the UK, Spain, Italy and Poland are the largest key markets for medicinal and aromatic plants. The markets are driven by their robust manufacturing industries and large consumer bases.

Contents of this page

1. Product description

In Europe, lots of botanicals are used to relieve stress and anxiety, particularly calming herbs. These herbs are either consumed directly or used as essential oils in aromatherapy.

The most common plants include:

- Ashwagandha (*Withania somnifera*)
- German camomile (*Matricaria chamomilla*)
- Lavender (*Lavandula angustifolia, L. officinalis*)
- Lemon balm (*Melissa officinalis*)
- Passionflower (*Passiflora incarnata*)
- Rhodiola (*Rhodiola rosea*), which is a new species on the CITES list
- Saffron (*Crocus sativus L.*)
- St John’s wort (*Hypericum perforatum*)
- Valerian (*Valeriana officinalis*)

Stress & Anxiety

The words ‘stress’ and ‘anxiety’ relate to conditions that affect the balance between the body’s sympathetic and parasympathetic nervous systems. These nervous systems stimulate activities associated with fight-or-flight responses (sympathetic) and activities that occur when the body is at rest (parasympathetic).

Stress and anxiety affect how these processes work. Chronic stress can mean the sympathetic nervous system is always active. This can lead to health issues like high blood pressure and anxiety.

Anxiety is a feeling of fear, worry or unease. It can be triggered by stress but can also lack a clear cause. High levels of stress and anxiety mean the body does not get enough rest. This can lead to problems like poor digestion and weakened immune responses. Both stress and anxiety can also lead to sleep deprivation, insomnia, bad moods and depression.

This factsheet discusses the botanicals are used to treat these conditions.

Stress & Anxiety and natural health products

Treatment for stress and anxiety depends on the severity of the condition. Severe cases of depression, insomnia and anxiety are usually treated in consultation with physicians with conventional medicine rather than with herbal medicinal products or supplements.

For milder forms of depression, stress, anxiety, sleep difficulties and low mood, consumers use herbal remedies more often. This preference is affected by the availability of non-prescription and over-the-counter (OTC) products. Many of these products are sold as aromatherapy or food supplements, which feature lower concentrations of active ingredients. However, many companies offer both supplements and medicinal products that contain the same active ingredients. Medicinal products have higher concentrations and pharmaceutical-grade quality ingredients. They are claimed to be more effective. In terms of mild stress and anxiety, consumers are also interested in herbal teas.

Figure 1: Examples of herbal medicinal products for stress relief

Source: Holland & Barrett, 2024

Interesting botanicals for herbal teas include chamomile, valerian, lavender, spearmint, tulsi (holy basil), fennel, ginseng and lemon balm.

Figure 2: Ingredients of a herbal tea that promotes relaxation

Source: Pukka, 2024

Tips:

Be careful when making health claims about your products. Health claims are regulated in the European Union (EU). Take a look at the European Union (EU) portal on health claims to see what is allowed. You can search the database using your product's trade or botanical names.

Not all species are allowed in food supplements. Look at lists of species permitted to be used in food supplements (e.g. the BELFRIT list) or find out what EU regulations allow with health authorities and experts.

For more information on research into the health benefits of your specific ingredient and to access scientific resources, visit the Examine website.

2. What makes Europe an interesting market for natural ingredients for Stress & Anxiety products?

Europe is an attractive market for natural ingredients for stress and anxiety products due to the large import volumes of medicinal and aromatic plants (MAPs). Stress and anxiety are important issues in Europe. The European market for stress relief supplements is the second largest in the world. It is driven by increased stress levels due to the COVID-19 pandemic and growing consumer awareness of the benefits of herbal supplements.

Stress and anxiety products find an important market in Europe

Sales of dietary supplements for treating stress and sleep problems have increased by 14% since 2020, seeing their fastest growth worldwide in 2023. According to the Worldwide Independent Network of MR (WIN), 79% of individuals worldwide experience stress to some degree. The groups that experience the highest daily stress levels are full-time workers (82%) and students (83%).

A 2023 survey of 3,000 workers in Europe showed that the decline of mental health in Europe is due in part to stress, revealing that 38% are at high risk of poor mental health. Anxiety was the most common mental health condition, affecting 17% of workers. Sleep issues were reported by 14%, making it the second most common condition, followed closely by depression, reported by 12%.

The European market for stress relief supplements is the second largest in the world after North America. Food supplements aimed at stress relief have grown significantly since 2020. The COVID-19 pandemic intensified stress levels, driving interest in stress relief products. The market is also growing due to widespread consumer awareness about the potential benefits of herbal stress relief supplements. This is connected to the growing focus on preventive healthcare and increasing awareness of health issues.

Germany has Europe's largest market share of stress relief supplements, but the UK market is experiencing the fastest growth. In terms of the total food supplement market, Italy is the largest with 26% of total sales, followed by Germany (19%) and France (15%).

Export potential of different botanicals and oils

Not all botanicals are equally important for exporters from developing countries.

- St. John's Wort faces limited opportunities for exporters due to its overlap with conventional medicine and strong competition from European producers.
- Lavender has significant competition from European countries. To remain competitive, lavender production requires large-scale production and high levels of mechanisation.
- Kava (*Piper methysticum*) is a popular ingredient used for stress relief. However, this ingredient was banned in Europe in 2003 due to toxicity associated with supplements that contained aerial parts of the plant. These toxicity issues were not present when only the roots were used. The ban was lifted in some countries, but selling products that contain kava is still prohibited in several countries, including the Netherlands and the United Kingdom.

The most promising botanicals in this market are:

- Valerian root, passionflower and lemon balm present promising opportunities for producers in emerging market economies with suitable growing conditions.
- Rhodiola rosea (added to the CITES list in 2023) is an endangered species. The surge in demand has led to the overexploitation of wild Rhodiola populations, leading to extensive environmental and social effects. Industry experts expect a sharp decline in uncontrolled wild collection, which will significantly affect supply. Compliance with CITES regulations is strict. A lot of effort from suppliers and the relevant authorities is needed to ensure legal trade.

Oils of interest for exporting from developing countries to Europe include neroli, frankincense, lemon balm, clary sage, bergamot, lavender and ylang-ylang. These essential oils can be regulated as cosmetic products unless a specific medicinal claim is made on the label.

For more information on aromatherapy, read the study on exporting essential oils for aromatherapy to Europe on CBI's website. Another good source for literature on this topic is Forum Essenzia.

Europe is a major importer of medicinal and aromatic plants

According to the ITC Trade Map, Europe imported a total of 219,000 tonnes of medicinal and aromatic plants (MAPs) in 2023, worth €1.3 billion. European import volumes have been relatively stable. Between 2019 and

2023, import volumes increased at an average year-to-year rate of 0.6%, while import values increased at an average annual rate of 8%.

In 2023, 47% of the value of total European imports originated in emerging market economies, up from 44% in 2019. India, Egypt, Morocco, Kenya and China are some of the largest non-European suppliers of MAPs to Europe.

Germany is Europe’s largest importer of MAPs, importing over 30% of all European MAPs in 2023. After Germany, the largest importers by volume are Spain (11% of the European total), France (9.7%), the United Kingdom (8.1%), Poland (7.4%) and Italy (6.9%).

These MAPs are used by Europe’s large manufacturing industry. The continent is home to some of the biggest product and ingredient manufacturers in the global nutraceutical industry. As a result, innovation and the development of new botanical-based products are continually advancing.

Source: ITC Trade Map, 2024

Europe is also large importer of botanicals extracts

Europe imports large amounts of botanical saps and extracts. In 2023, the value of European imports of saps and extracts reached €1.2 billion, accounting for around 34% of global imports. The value of these imports saw a notable annual growth rate of 4.3% between 2019 and 2023, while the volume saw a more moderate annual increase of 1.9%.

Although the share of imports from developing countries is still relatively small, it has been growing steadily. In 2019, only 10% of Europe’s total imports of saps and extracts came from developing countries. By 2023, this share had risen to 14%. China, India, Vietnam, Mexico, Madagascar and Kenya are some of the largest emerging suppliers of these products to Europe. However, it is important to note that suppliers from these countries face competition from Europe’s well-established extraction industry.

Germany is Europe’s largest importer of saps and extracts, representing around 22% of European imports in 2023. Other major European importers include Italy (12%), France (11%), Spain (11%), the Netherlands (9%) and Spain (5%).

Tips:

- Read the CBI study on the demand for natural ingredients for health products on the European market for more trade data on herbal medicinal products and food supplements.
- Visit online sources such as the ITC Trade Map and EU Access2Markets for more trade statistics on MAPs.
- Learn more about developments in the stress and anxiety products market. Read online magazines such as Nutra Ingredients, Nutraceuticals World and Vitafoods Insights, and get informed on trends, market requirements, product launches, mergers and acquisitions.

3. Which European countries offer the most opportunities for natural ingredients for stress and anxiety products?

Germany, France, the UK, Spain, Italy and Poland are the main European markets for natural ingredient exporters that target stress and anxiety products. These countries are the top importers of MAPs in the region. With strong manufacturing industries and large consumer markets, they require substantial volumes of raw materials for stress and anxiety products.

Germany

According to the German Health Knowledge Foundation, approximately 15 out of 100 people in Germany suffer from an anxiety disorder. Women are more often affected than men. Anxiety disorders are some of the most common mental disorders in Germany. Regarding stress, around 41% of German employees report feeling stress at work, compared to 30% and 35% in Switzerland and Austria, respectively.

The market has responded by introducing food supplements that are intended to reduce stress and anxiety. Examples of German brands that offer anti-stress and anxiety supplements include Naturitasand Nature Love.

About one third of Germans regularly consume nutritional supplements as part of their daily routine to enhance their health and wellbeing. The rapid expansion of this market reflects the increasing health consciousness and desire among Germans to lead active and healthy lifestyles. This growing adoption of healthier lifestyles also drives sales of natural and clean-label health products.

Natural and organic health products are increasingly viewed as safer and higher-quality. A survey conducted for Food Supplements Europe revealed that nearly 60% of respondents in Germany considered organic, natural and GMO-free labelling important when choosing food supplements.

In terms of size, Germany is the second largest consumer market in Europe for vitamins and dietary supplements. The supplement market was valued at $14 billion (USD) in 2022. Continued growth is expected at an average year-on-year growth of 6.7%, reaching $23 billion in 2030. Besides representing a large consumer market, Germany is also an important destination for ingredient exporters thanks to its big food supplement manufacturing industry. This means it has strong demand for a variety of raw materials and processed ingredients for use in health products for both domestic and international markets.

Germany imported nearly 67,000 tonnes of MAPs in 2023, at €401 million. Between 2019 and 2023, import volumes decreased at an average annual rate of 2.2%, while the value increased at a rate of 8% over the same period. The main supplying countries to Germany were Egypt (12% of imports), Poland (10%), India (10%) and China (6.4%).

Italy

According to the 2024 edition of the Mind Health Report by Axa and Ipsos, 28% of Italians struggle with their mental health, especially anxiety. This is an increase of 5% compared to the year before. In a professional context, around 76% of workers stated that they experienced either tiredness, loss of energy and interest, sleep disorders, stress or anxiety.

Although the goal of improving mental health is not among the top reasons for taking supplements, it is a major trend in Italy. The demand for supplements that boost mental health to better cope with the increasingly stressful world is growing quickly in Italy. Over the past ten years, the consumption of food supplements related to insomnia and mental health has increased by 155%. In 2023, supplements for sleep-related disorders and mental wellbeing reached a sales value of €146 million. The demand for products that specifically promote better mental health is expected to continue to grow.

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 doctors before buying supplements, while 36% seek advice from pharmacists. Probiotics were the largest supplement sales category in Italy, with sales exceeding €537 million in 2023, followed by minerals at €335 million.

A survey conducted on behalf of Food Supplements Europe showed that approximately 73% of respondents in Italy indicated that organic, natural or GMO-free labelling was important when selecting food supplements. This is significantly higher than the European average of 56%.

In terms of size, Italy is the largest food supplement market in Europe. Food supplements have become an integral part of the routines of millions of Italians. About 73% of Italians used supplements at least once in 2023. The sector was worth over €4.5 billion in 2023. Pharmacies are the main distribution channel, selling around 78% of food supplements. Examples of stress relief products on the Italian market include those produced by Nat & Form and Boiron.

Thanks to its large food supplement manufacturing industry, Italy is one of Europe's top six importers of medicinal and aromatic plants. Italy imported over 15,000 tonnes of MAPs in 2023, valued at €94 million. Between 2019 and 2023, import volumes increased at an average annual rate of 6.5%, while the value increased at a rate of 7.1% over the same period. Italy's main supply countries are other European countries, led by Poland (13% of total imports), followed by Austria (11%) and France (8.3%). The largest non-European suppliers of MAPs are India (11%), Morocco (4.4.%) and Egypt (2.6%).

France

Stress is one of the most prevalent health issues in French society, especially in professional settings. Stress has a significant impact on the lives of the French. According to a 2023 Ipsos survey, 36% of French people say stress disrupted their lives on several occasions in 2022. This has led to growing concern among French people about their mental health, with 55% of respondents sharing concerns, up from 41% in 2021 and 49% in 2022.

About 72% of French people consider that food supplements are effective in combating health issues, including mental health. Main complaints for which supplements were taken in 2023 concerned tiredness (52%), stress (46%) and bad sleep quality (46%). The main reasons for taking supplements are strengthening the immune system (48%), being in good shape (44%), sleeping better (36%) and reducing stress (31%).

Of these categories, stress and sleep-related products are growing particularly fast. Between 2022 and 2023, sales grew by over 10% in pharmacies, 9% in drugstores and 6% in supermarkets. One example of a brand that offers stress and anxiety products based on botanicals is Laboratoire Naturveda.

In terms of purchase decisions, 68% of French respondents indicated that they found it important for food supplements to be labelled as organic, natural or non-GMO. As Europe's second-largest organic market, France is a promising opportunity for organic-certified medicinal and aromatic plants. This potential is evident in Biocoop, France's leading organic retailer, which has responded to demand by developing its own range of 100% organic food supplements.

Overall, France is the third largest European market for food supplements. In 2023, the French food supplements market was worth €2.7 billion, up 3% compared to the year before. The supplements market in France is expected to grow at an average annual rate of 6.1% between 2023 and 2028. Growth is partly driven by the popularity of online distribution channels.

Regarding imports of MAPS, France ranked as Europe's third-largest importer in 2023. Total imports amounted to 21,000 tonnes, at a value of €123 million. Between 2019 and 2023, import volumes increased slightly at a year-to-year growth of 2.5%. Value increased faster at a rate of 9.2% over the same period. Morocco (16%), India (11%), China (9.8%) and Germany (9.0%) were the main supplying countries to France.

The United Kingdom

Stress is a serious and prevalent issue in the UK. In a large mental health survey conducted in the UK, 91% of respondents reported experiencing high or extreme levels of pressure or stress at various frequencies over the past year. Specifically, 5% reported constant stress, 29% frequent stress, 34% occasional stress and 22% rare instances. Only 8% reported never experiencing stress, while 2% were unsure.

This situation, combined with the UK population's growing focus on health, has driven the demand for vitamins and supplements. A growing number of customers are purchasing these products. Specifically for the online vitamin and supplement retailing industry, revenue is expected to reach £1.4 billion by 2025, growing by 1.3% between 2024 and 2025.

Examples of brands in the UK that offer health products for reducing stress include Cytoplan and Kalms. Noggin is an example of a UK company that focuses on brain health supplements. Their Pause product reduces stress and anxiety and contains a blend of ashwagandha, rhodiola, lemon balm, l-theanine and more.

In addition to the food supplement sector, the UK's herbal tea sector is an interesting segment for natural ingredients for stress and anxiety relief. Tea is a staple beverage in the UK, with black tea being the most popular. However, there is growing interest in green and herbal teas, particularly among younger consumers. This trend is aligned with growing interest in functional beverages for throughout the day.

The organic segment of the tea sector is also growing steadily. Examples of fully organic UK brands that offer functional herbal teas include Pukka Herbs and Clipper. Both brands sell their products throughout Europe. Industry experts predict that the UK will lead the demand for herbal and botanical teas in Europe in the coming years.

Regarding MAP imports, the UK ranked as Europe's fourth largest importer in 2023. Total imports reached nearly 18,000 tonnes in 2023, at €103 million. The main supplying countries to the UK were India (12% of the UK's imports), Kenya (10%), Spain (9.6%), Egypt (8.1%) and China (7.9%). Total imports increased at an average annual rate of 1.7% between 2019 and 2023, while value increased by 7.8% over the same period.

Spain

Stress and mental health problems have become a larger concern in Spain, with 62% of the Spanish population reporting to frequently feel stressed. There is a growing number of companies that offer dietary supplements that promise to relieve stress, anxiety and sleep problems. Superlativa is one example of a Spanish brand that offers plant-based stress relief supplements.

Around 75% of the Spanish population reported to have consumed some type of supplement in 2023. Vitamins and mineral supplements are the most important category, but supplements with plant extracts are also very popular. About 50% of those who consume dietary products do so following the recommendations of a doctor and 37% at the advice of a pharmacist.

The Spanish food supplement market is the fifth largest in Europe. Spanish consumption of dietary supplements amounted to over €2 billion 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 its ageing population, increased incidence of chronic diseases, allergies and intolerances, and growing interest in improving health.

Approximately 59% of Spanish respondents 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%. Natural and organic health products are perceived as safer and higher-quality.

Besides a growing consumption market, Spain is an important importer of MAPs. In 2023, it was Europe's second largest importer of MAPs. Total imports amounted to 24,000 tonnes in 2023, valued at €97 million. Between 2019 and 2023, imports remained relatively stable, showing a slight year-to-year decline of 0.7%, while import value increased at a growth rate of 3.2%. The main supplying countries to Spain were Morocco (24% of total imports), Poland (10%), Egypt (8.4%) and the United States (5.9%).Examples of trading companies in Spain include Tradichem and Gonmisol. Both trade in a wide variety of raw materials, extracts and active pharmaceutical ingredients.

Poland

The consumer markets for food supplements are much larger in Western Europe, but the market in Poland is growing fast. In Eastern Europe, Poland is the largest dietary supplement market, valued at around PLN 6.9 billion (€1.6 billion) in 2022, an increase of 12% from the year before. Rising consumer awareness, growing interest in healthy lifestyles and demand for natural products are key drivers behind this.

About 39% of Poles regularly use dietary supplements and vitamins. The number of people who have purchased dietary supplements at least once is increasing annually in Poland. Over 75% of adults reported buying at least one dietary supplement in 2022, more than triple the number from 2019.

The most popular supplements are vitamins, minerals and supplements that support hair, nails, skin and immunity. Stress reduction is also an important health goal in Poland, although to a lesser extent. In 2022, nearly 41% of Poles stated they experienced stress from time to time, while 36% felt stressed very often and 7% constantly felt stressed. Stress was mainly managed through physical activity (41%) and breathing exercises (38%). About 27% stated specifically drinking lemon balm tea, while 25% reported using medications and dietary supplements. Examples of brands that offer anxiety and stress relief products based on natural ingredients include Vitama Nature and Noyo.

In addition to its growing consumer market, Poland is the fifth largest importer of MAPs in Europe. In 2023, total imports amounted to 16 tonnes, valued at €73 million. This translates to a 7.4% share in volume and 5.5% in value of total European imports. Poland stands out as it registered the largest growth in terms of import volumes and value compared to other larger importers. Between 2019 and 2023, volumes increased at an average annual growth rate of over 10%, while the import value increased to nearly 19%. The largest supplying countries in 2023 were Russia (15% of total Polish imports), followed by Ukraine (15%), Germany (14%), Egypt (9.6%) and India (8.9%).

Poland requires increasing volumes of MAPs to meet growing domestic demand and support its expanding manufacturing industry. In 2022, nearly 30,000 companies produced and sold food supplements in Poland. The country is home to several manufacturers and distributors that serve the entire European market. Consequently, the demand for organic MAPs is also growing, in line with European demand for organic products. ALG Pharma is an example of a manufacturer, distributor and exporter of food supplements in Poland. Other leading contract manufacturers include Tifarm, BioCorpo and Tantus. Important Polish traders of natural ingredients include Grotex and Agrema Poland.

Tips:

- Determine which market offers the best opportunities for your company. You can get market information from sector associations that you can find on the European Federation of Associations of Health Product Manufacturers website and the online product portfolios of brands, distributors and retailers.
- Focus on markets that need stress and anxiety products and high sales of mood food supplements, such as France, the UK, Germany and Italy.
- Read CBI’s study on tips on how to find buyers in the European natural ingredients for health products

market for valuable information on how to approach European buyers successfully.

4. Which trends offer opportunities or pose threats in the European natural ingredients market for stress and anxiety products?

The European natural ingredients market for stress and anxiety products presents opportunities and threats due to the growing scrutiny of popular ingredients. Ashwagandha, for example, faces bans and warnings in several countries over safety concerns. This regulatory environment may open doors for alternative botanicals as the demand for natural stress relief solutions continues to rise. Manufacturers are exploring new ingredients that meet stringent safety standards, creating potential for innovation. However, this also means exporters have to stay up to date with evolving regulations and ensure thorough documentation to demonstrate the safety and compliance of their products.

The growing popularity of stress relief botanicals in herbal teas

The rapid growth of the herbal tea market in Europe has led to consumers being more familiar with natural ingredients and their health benefits. As herbal teas are more frequently seen and consumed, the therapeutic effects of certain botanicals have become more widely known. This repeated exposure typically boosts both awareness and credibility, making consumers more likely to purchase and trust these products. This also increases the likelihood that consumers will accept these botanicals as dietary supplements.

Stress-related health goals, such as more relaxation and better sleep, are popular categories in the herbal tea market. Leading European brands, like Yogi Tea and Pukka Herbs, offer teas with botanicals known for their calming properties. Yogi Tea’s Relax blend includes chamomile, linden flowers and rosehips for their soothing effects. Similarly, Pukka Herbs’ Peace tea combines chamomile, spearmint, ashwagandha, liquorice root and lavender to promote relaxation and reduce anxiety.

Supermarkets’ private label brands have also embraced this trend. One example is the UK retailer Sainsbury’s Bedtime Infusion. This herbal tea targets stress relief and relaxation, blending chamomile, lemon balm, lavender and valerian root.

Major European markets for herbal teas that combine herbs, flowers and fruits include Germany, Poland, the United Kingdom and France. Despite the increasing popularity of herbal teas and their role in popularising ingredients for stress and anxiety relief, it is important to note that the claims for botanical ingredients used in herbal teas have yet to be evaluated by the European Food Safety Authority (EFSA).

Increased scrutiny on botanicals on the European market

In 2024, experts from 26 national food safety agencies in the EU produced a report on substances that should not be used or used to a limited extent in food supplements. Of the 13 ingredients shortlisted as posing a risk to human health, there are several that are known for their cognitive benefits, including melatonin, St. John’s wort, holy basil (tulsi) and ashwagandha.

This shows that botanicals are facing growing scrutiny in the EU. The 13 ingredients mentioned in the EU workgroup’s report are being proposed for inclusion and review under the ‘Article 8 procedure’. Initiated in 2006, Article 8 authorises the European Commission to start the process of prohibiting, restricting or putting substances under scrutiny in the EU. The procedure for listing a substance is only launched if a preliminary assessment of the actual conditions of use and consumption of the substance shows a potential risk to consumers. Article 8 is part of Regulation No. 1925/2006. Annex III lists the current substances prohibited, restricted or under scrutiny.

Food safety is a key issue in the European market and has given rise to constant food safety assessments. This makes it essential for exporters to stay up to date with European regulations and developments. It also underscores the importance for exporters to have complete technical dossiers on their products. Technical dossiers provide detailed information about your ingredient. They help regulators evaluate its safety and suitability for use in food supplements. It also shows buyers that your product complies with EU requirements, it is safe for consumption and is of consistent and high quality.

Ashwagandha is a popular stress relief ingredient but is under scrutiny in Europe

Ashwagandha is a prominently ingredient in stress relief supplements. Multiple studies have demonstrated that ashwagandha significantly lowers stress and anxiety levels, alleviates sleeplessness and fatigue, and reduces serum cortisol (a stress hormone) levels when compared to a placebo.

At the same time, there have been concerns about the safety and history of the use of ashwagandha in food supplements on the European market. According to a 2020 evaluation by the Danish Technical University, ashwagandha can have negative hormonal effects on reproduction in both animals and humans. In addition, other studies indicate other negative side effects, such as stomach upset, liver damage and very low blood sugar levels.

As a result, in 2023, Denmark prohibited the use of ashwagandha in food supplements. Other Nordic countries, such as Finland and Sweden, are also considering whether to prohibit the use of ashwagandha or not. France has also warned against the use of ashwagandha in specific groups, including pregnant women and people under the age of 18. This is likely going to mean that operators in France will have to start using new labelling warmings on food supplements that contain ashwagandha. The National Institute for Public Health and the Environment (RVI) in the Netherlands advised against the use of the ingredients. In Poland, maximum levels for daily intake of ashwagandha have been established. The UK Food Standards Agency has put ashwagandha on its Risk Analysis Tracker to identify and assess potential risks.

Despite these warnings, several experts have disproved these statements and question the studies conducted to reach such conclusions. One of the concerns is that although the roots of ashwagandha are traditionally used, some manufacturers are incorporating aerial parts of the plant to boost yield and profitability. This practice could introduce toxicity. Consequently, exporters of Ayurvedic ingredients and products must be familiar with European regulations, ensure their products are clean and of high quality, and provide comprehensive documentation that demonstrates the safety of their products for human health. Have a look at the KSM-66 website (India) to see how they ensure quality for their buyers and how they communicate it.

Room for new botanicals in stress and anxiety relief products

Stress and insufficient sleep are common issues for many Europeans. Many consumers are interested in finding products that can enhance sleep quality, reduce stress and improve overall health. New products that target sleep and stress reduction are still rather low. This means there is potential for further innovation and product development.

Product development on natural ingredients is already widespread, but it is expected to further dominate the stress and anxiety product segment. Botanical adaptogens like panax ginseng, rhodiola and schisandra are associated with cognitive benefits. Additionally, ingredients like lavender, hops and L-theanine are recognised for their cognitive properties and are featured in food and drink trend forecasts.

Some of these ingredients have already been fully incorporated in the stress-relief product lines of food supplement manufacturers, whereas others are still being studied. For many ingredients, more research and better scientific understanding are first needed before they can be embraced by the industry. Once their efficacy and safety is fully understood and tested, new products can be launched onto the market.

One example of a new botanical extract marketed for stress and mood support launched on the European market is Vanizem. Vanizem is sourced from the spice Aframomum melegueta, which is of West African origin and is also known as Grains of Paradise. The extract is formulated by Nektium, a Spain-based nutraceutical company that combines ethnobotanical knowledge, scientific and marketing insights to create innovative plant-based products.

The increased scrutiny may also provide opportunities for other botanicals with similar health benefits. For instance, manufacturers are looking into developing new melatonin-free sleep products.

Tips:

- Stay informed on regulatory changes in the European Union. You can do this by following the food supplement page of the European Food Safety Agency and the European Commission's food supplement page.
- Search the EU's Rapid Alert System for Food and Feed (RASFF) database for examples of withdrawals from the market and the reasons for these withdrawals.
- See if getting certified is a good idea for your company. It could help guarantee buyers that your product meets certain standards. However, before applying for certifications, always talk with buyers about whether they are interested in certified ingredients. If you are already certified, tell prospective buyers about your certification. Show this on your website and marketing materials.
- Find out about the local practices in your country for stress remedies. Traditional uses can be a good starting point when determining new ingredients for stress and anxiety relief. For new ingredients, check if there is a history of medicinal use of at least 30 years. 15 years of these years need to be in the EU. If you cannot find a history of safe use, find out whether you can access the food supplement part of the market with your ingredient.

Lisanne Groothuis of ProFound – Advisers In Development carried out this study on behalf of CBI.

Please review our market information disclaimer.