

The International Nutritional Supplements Market

**Evolution, foundations, regulation and strategic
opportunity for IntaBiotech and ND Pharma & Biotech**

IntaBiotech Technical Department

www.intabiotech.com





From Marginal Supplement to Global Industry

For decades, nutritional supplements occupied an ambiguous position between food, pharmacy, and preventive medicine. Today, that ambiguity has transformed into sophistication. The modern supplement is no longer a multivitamin tablet: it encompasses probiotics, adaptogens, peptides, botanical extracts, functional lipids, and highly specific formulas targeting the microbiome, sleep, immunity, cognitive performance, and longevity.

Cultural

The modern consumer wants to actively intervene in their own health and wellbeing.

Health


Growing burden of chronic disease, nutritional deficiencies, and an ageing population.

Technological

AI, wearables, analytics, and e-commerce enable supplementation to be segmented as never before.

Commercial

High recurrence, strong relative margins, and considerable narrative potential for brands.

 The FDA has identified more than 1,000 products marketed as supplements that contained undisclosed drugs or substances. Growth demands technical responsibility.

Three Historical Stages of the Supplement Phenomenon

The evolution of the market can be understood in three broad phases that define consumer motivations, regulatory expectations, and the opportunities available to technical operators.



1st Phase: Correcting Deficiencies

Prevention and correction of critical nutritional deficits: iron, vitamin A, iodine, folic acid, vitamin D. The supplement as a complement to the diet, not a substitute for it.



2nd Phase: Performance, Aesthetics and Wellbeing

Expansion into sport, fitness, weight management and body aesthetics from the 1980s and 90s. With commercial growth came exaggerated claims and deliberate adulteration.



3rd Phase: Preventive Health and Personalisation

Today's consumer seeks functional solutions: microbiota, low-grade inflammation, longevity, cognitive health, menopause, sarcopaenia and emotional wellbeing. The market no longer rewards availability; it rewards credibility.



ATEMES

DEFEND

SPEL

TUNIK
ACTE LUCE



Global Market Size and Growth

The sector is showing very high expansion rates, although figures vary depending on the source and the scope of analysis. A strategic reading requires working with ranges and segmenting by category, channel, region, and regulatory framework.

\$209B

Global Market 2025

Dietary supplements according to Grand View Research, with a projection of \$431B by 2033.

9.5%

Global CAGR

Projected compound annual growth rate between 2026 and 2033 for dietary supplements.

\$151B

Asia-Pacific 2033

Up from \$64.5B in 2024, with a CAGR of 9.9%, making it the most dynamic region.

\$50.7B

Europe 2032

Up from \$26.6B in 2024, with a CAGR of 8.45% according to Fortune Business Insights.

📌 Differences between sources do not reflect error, but rather heterogeneity in definitions. The correct strategy requires segmentation: ingredient, claim, region, channel, and barrier to entry.

The Six Foundations of Structural Growth

The growth of this market is not a passing trend, but rather the convergence of six structural factors that guarantee sustained long-term demand.



Ageing and Longevity

The 50–70-year-old consumer seeks to preserve mobility, memory and metabolism. Longevity is now a consumer narrative, not merely a clinical concept.



Digitalisation of Self-Care

Wearables, microbiota testing, genetic tests, continuous glucose monitors and health apps have transformed the way consumers perceive their own bodies.



Women's Health

From an underserved niche to an area of maximum potential: menstruation, fertility, menopause, bone health, iron, vaginal microbiota, sleep and metabolic health.



Preventative Healthcare

Supplements can play a reasonable role in preventative nutrition, provided they do not claim to cure or treat diseases when not authorised to do so.



Sport and Performance

Sports nutrition has been democratised: it is no longer exclusively for athletes, but also for the recreational consumer, the senior, and the executive seeking physical and cognitive performance.



Microbiota and Immunity

The gut–immunity–metabolism–brain axis is one of the sector's greatest drivers. Probiotics, prebiotics, postbiotics and synbiotics offer an enormous field, though one that is demanding from a regulatory standpoint.

Barriers to the International Market

The supplements market appears attractive due to its growing demand and potential margins. However, internationalising supplements is technically challenging. Understanding these barriers is the first step towards turning them into a competitive advantage.

Divergent Legal Classification

The same product may be classified as a food, food supplement, traditional medicine, or *health food* depending on the country, dosage, ingredient, and claim. In the US, the FDA regulates under a framework that differs from the European one; in Australia, many equivalent products are registered as *complementary medicines*.

Claims and Commercial Communication

In the EU, health claims must be authorised in accordance with Regulation 1924/2006. In the US, the FTC requires that they be truthful, non-misleading, and supported by science. It is not possible to translate labels literally between jurisdictions.

Permitted Ingredients and Novel Foods

A plant, extract, or peptide may be permitted in one market and restricted in another. In Europe, the Novel Foods Regulation adds an additional layer for ingredients without a significant history of consumption prior to May 1997.

Quality, Contaminants, and Documentation

The sophisticated buyer expects a CoA per batch, specifications, allergen declarations, GMO status, heavy metals, pesticides, microbiology, stability, traceability, and full regulatory support. Many smaller companies do not have this structure in place.

The State of Harmonisation

There is no "global passport" for supplements as yet. However, there is a convergence of principles: safety, traceability, good manufacturing practices, substantiated claims, adulteration control, and post-marketing responsibility.

Regulatory Harmonisation: Partial Progress

Harmonisation is a logical aspiration, but remains incomplete. The Codex Alimentarius, Directive 2002/46/EC, and national systems coexist with persistent divergences in maximum doses, botanicals, and notifications.

- **EU:** Directive 2002/46/EC harmonises vitamins and minerals, but national fragmentation persists in doses, botanicals, and claims.
- **Japan:** Sophisticated system with FOSHU (government evaluation) and Foods with Function Claims (operator responsibility and notification).
- **Australia:** TGA classifies many supplements as *listed complementary medicines* with early market access.
- **China:** Health foods require prior registration or *filing* depending on ingredient, function, and product category.

Safety First: The New Competitive Axis

Safety must not be a slogan, but an **operating system**. Supplements are consumed chronically, without medical supervision, by people who erroneously associate "natural" with "safe". This association is scientifically false and constitutes one of the principal risks in the sector.



Unequivocal Ingredient Identity

Species, plant part, extraction ratio, solvent, active marker, analytical fingerprint, adulterants and contaminants — all perfectly documented.



Rational Dosage

Neither cosmetic under-dosing nor irresponsible over-dosing. The dose must be grounded in evidence, legal limits, total intake and the target population.



Contaminant Control

Heavy metals, pesticides, mycotoxins, PAHs, dioxins, microbiology, solvent residues, toxic alkaloids and emerging contaminants.



Supplier Auditing and Nutrivigilance

There is no safety without supply chain control. In the USA, serious adverse events must be reported to the FDA within a maximum of 15 working days.

Safety First • Our Compromise

Strategic Geography: Europe, America and Asia-Pacific

Each region offers a distinct profile of opportunities, regulatory requirements and entry strategies. Treating them as a single homogeneous market is one of the most common mistakes in the internationalisation of supplements.



Europe: Trust and High Standards

A mature, regulated market that is sensitive to transparency. Opportunity is built on technically sound formulation, regulatory compliance and B2B value — not on aggressive claims.



North America: Scale, Speed and Reputational Risk

A dynamic market with a deeply embedded supplement culture. It offers volume, but also risk: litigation, *class actions*, advertising scrutiny and demands from third-party certifiers.



Asia-Pacific: The Major Growth Hub

Demographics, a tradition of functional ingredients, digitalisation and disposable income are driving the highest global growth rate. Japan, China, Korea, India and South-East Asia each require country-specific strategies.



Latin America: Flexibility and Technical Support

Strong interest in natural health, medicinal plants and sport, within heterogeneous regulatory frameworks. Brazil, Mexico, Colombia and Chile each require a country-by-country strategy with local technical and documentary support.

ND Pharma · IntaBiotech
Proudly Operating in 5 Continents



Batch ID: S...

Batch ID: G...

Batch ID: S...

Batch ID: S...

Batch ID: S...

Incubation

Purity

QC Number

QC Number

Private

Regulatory Compliance

Diagnosis Protocol

Batch ID: G...

Lot Number F...

Product ID: S...

Regulatory Dossier

Regulatory Dossier

Quality Protocols

Compliance

IntaBiotech and ND Pharma: Privileged Operators

The position of IntaBiotech and ND Pharma should not be defined as that of just another supplements brand. The real strategic opportunity lies in operating as a **technical-commercial platform** capable of bridging four worlds that are normally separate: ingredients, formulation, regulation, and market.



Qualified Sourcing

Selecting ingredients with identity, origin, specification, traceability, and complete documentation per batch.



Market-Oriented Formulation

Converting ingredients into concepts: women's health, sport, microbiota, ageing, energy, sleep, and metabolism.



Regulatory Adaptation

Adjusting doses, claims, labelling, and documentation for Europe, the USA, LATAM, Japan, China, Australia, and GCC markets.



Safety Control

Implementing a risk matrix per ingredient and product, with analytical control of supplier, batch, and stability.



B2B Support and Contract Manufacturing

Supporting distributors, brands, and manufacturers from concept to compliant product, reducing development time and regulatory risk.

Strategic Business Lines

The areas of greatest potential for IntaBiotech and ND Pharma are organised across six product and service lines that combine structural demand with differential technical capability.

Women's Health

A line organised by life stage: adolescence, fertility, pregnancy, postpartum, menopause, and bone health. Key: authorised claims by population, with no empty emotional marketing.

Sport and Performance

Clean, dosed, and documented formulas for strength, endurance, recovery, and hydration. With the option of anti-doping certifications where the channel requires it.

Microbiota, Fibres, and Digestion

Prebiotics, enzymes, and postbiotics with strong B2B potential. The European strategy requires particular care with terminology and claims, avoiding US commercial language that does not translate across markets.

Longevity and Healthy Ageing

Maintenance of muscular, bone, cognitive, and metabolic function with admissible claims. Proteins, creatine, omega-3, polyphenols, CoQ10, and collagen at the core of the range.

Standardised Botanicals

The generic botanical loses value; the standardised one gains it. Dossiers at regulatory and toxicological level, not commercial brochures. Species, ratio, solvent, marker, contaminants, and dose.

Premixes and B2B Solutions

Functional premixes for third parties: beverages, sachets, sticks, capsules, gummies, powders, and functional foods. Maximum added value with the correct classification of each format.



Qalietact Ingredients

Top section of the display stand containing various bottles and boxes of ingredients.

Immune Support

Digestive Health

Digestive Health

Cognitive Function

Middle section of the display stand featuring several bottles, informational cards on clipboards, and a blister pack of pills.

Immune Formure

Energy & Vitality

Bottom section of the display stand containing jars of dried herbs, bottles, and informational cards.

Operational Model: From Catalogue to Platform

A broad catalogue is useful, but it only creates advantage when it is structured hierarchically. The recommendation is to build a four-level platform that enables the shift from *"we sell ingredients"* to *"we build internationalised nutraceutical solutions"*.



Level 4: Market Product

Final product adapted to channel, country, claim, language, format, label, and commercial strategy.



Level 3: Modular Formulae

Ready-to-adapt modules: Women's Health, Sport, Digestive Health, Immunity, Healthy Ageing, Beauty-from-within, Sleep & Stress, Bone & Joint, Metabolic Balance.



Level 2: Qualified Actives

Ingredients with robust specification, CoA, markers, studies, regulatory status, contaminant limits, and audited suppliers.



Level 1: Base Ingredients

Vitamins, minerals, amino acids, proteins, fibres, enzymes, botanicals, functional lipids, probiotics, antioxidants, and extracts.

The Central Thesis

To be the technical-regulatory and product development partner that enables distributors, manufacturers and brands to launch safe, documented, internationalisation-ready and commercially coherent supplements, reducing uncertainty, development time and regulatory risk.

— *Differential value proposition of IntaBiotech / ND Pharma*

The Competitive Advantage Will Be Regulatory

In the supplements market, many operators can source raw materials. Fewer know how to formulate. Fewer still know how to document, defend claims, adapt labels, prevent risks and support clients across multiple countries. **That is where the strategic window lies.**

This thesis is more robust than positioning as a "premium supplement brand", because it makes better use of existing capabilities:

- Qualified international sourcing
- Broad portfolio with proven B2B experience
- Clean label and contract manufacturing capability
- Cross-sector experience: food, cosmetics, animal nutrition and human health
- Applied biotechnology and differentiated functional ingredients

IntaBiotech

Inspired by Nature • Driven by Science

Strategic Risks to Be Avoided

The opportunity is real, but not automatic. Identifying and managing inherent risks is just as important as capitalising on growth opportunities. The market is forgiving in the short term, but regulators, serious distributors, and industrial clients are not.

→ Excessive Claims

Promises such as "cures", "prevents", "burns fat", "detoxifies the liver", or "reverses ageing" may be unlawful if not authorised. The regulatory and reputational risk is significant.

→ Oversized Catalogue Without Prioritisation

An enormous portfolio may be impressive, but it can dilute focus. The company should prioritise 20–30 flagship solutions with excellent documentation rather than 300 references with weak support.

→ Suppliers Without Genuine Auditing

International sourcing is only an advantage if there is effective oversight. Without auditing, analysis, traceability, and specifications, it becomes a direct risk to product safety.

→ Lack of Scientific Differentiation

The market is saturated with similar formulas. Differentiation must be grounded in dosage, bioavailability, chemical form, stability, studies, and regulatory compliance — not merely in commercial names.

→ Confusing a Supplement With a Medicine

The most dangerous error. A supplement may support normal physiological functions; it must not be presented as a treatment unless within a specific legal framework that expressly authorises it.



BRASIL

INDIA

BRAZIL KORE

VITAMINS

VITAMINS

PROTEIN

CREATINE

VITAMINS

Future Vision: Seven Trends of an Evolved Market

The supplements market in Europe, the Americas, and Asia-Pacific will undergo profound transformation over the next decade. Anticipating these trends is a prerequisite for occupying a position of technical leadership.

Greater Regulation

Increased scrutiny of marketplaces, influencers, implicit claims, and imported products. Safety will become a barrier to entry.

Evidence-Based Personalisation

Biomarkers, microbiota, dietary history, AI, and hormonal cycles. The online questionnaire will no longer suffice.

Food-Supplement Convergence

Functional drinks, sticks, gummies, shots, and fortified snacks will grow, requiring precise legal classification.

Women's Health and Senior Wellbeing

Menopause, bone, muscle, sleep, cognition, and metabolism as priority areas for strategic expansion.

Microbiota and Digestion

Fibres, prebiotics, postbiotics, and enzymes with prudent claims will continue to be drivers of growth.

Sustainability and Traceability

Verifiable origins, environmental footprint, sustainable packaging, and responsible supply chains will be demanded by consumers and distributors alike.

Supplement-Cosmetics Convergence

Beauty-from-within, nutraceuticals, the gut-skin axis, and collagen: a natural space for IntaBiotech/ND Pharma given their cross-sector expertise.

Conclusion: The Differential Position of IntaBiotech and ND Pharma

The international supplements market is neither a bubble nor a passing trend. It is the commercial manifestation of a profound and structural shift. Growth, however, coexists with greater scrutiny, increased competition, and rising technical demands.

Not Competing as Just Another Brand

Avoiding the ocean of capsules, gummies, and wellness promises without substance.

Differentiation lies not in marketing, but in technical architecture.

Being the Nutraceutical Platform

Carefully selected ingredients, responsible formulation, robust documentation, regulatory adaptation, safety first, and international B2B support.

Professionalising the Sector

The market is growing faster than its regulatory maturity. Here, a company with a technical culture and international vision can occupy a differential and defensible position.

- 📌 The future will belong to those who can unite science, regulation, safety, formulation, and market. **Less empty promise, more evidence. Less scattered catalogue, more defensible solutions. Less fashionable marketing, more technical product architecture.**

Commercial Contact

Our team is ready to assist you



Álvaro Robles

CCO · Chief Circulation Officer

☎ +34 609 825 416

✉ a.robles@intabiotech.com



José Ramón Castells

Commercial Manager

☎ +34 674 001 716

✉ jr.ndpharma@europe.com



Sue Rodríguez

Customer Relations & SPM

☎ +34 604 068 683

✉ sr.ndpharma@europe.com

☎ Telephone Numbers

Mobile: (+34) 613 812 425

Landline: (+34) 881 092 720

✉ Email

intabiotech@intabiotech.com

🏢 Registered Office

Botiguers, 3, 1ª Planta, Parque Empresarial Táctica, 46980, Paterna, Valencia, España

🏠 Industrial Address

Avda. Ferreiros, 143, Polígono Industrial Rio Do Pozo, 15578, Narón, A Coruña, España

ND Pharma Intabiotech

www.intabiotech.com

