



# WHAT IS THE SUPPLEMENT SECTOR WORRIED ABOUT?

IADSA

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International Alliance of Dietary/  
Food Supplement Associations

## Introduction

In order to understand better the 'mood' across the IADSA member associations, we initiated a survey provocatively titled "What is the supplement sector worried about?".

We received 24 responses\* representing all regions and we would like to thank the respondents for their contribution.

Despite the clear challenges in regulation and policy there is a great deal of optimism in the food supplement sector. The survey has confirmed that while we need to continue to invest in regulation, it is also critical that we continue to build the data to support the integration of supplementation in policy. This would in particular help address the growing healthcare cost burden and demonstrate to both regulators and policy makers that supplements bring value. Recognition and acceptance of supplementation in policy can only help in achieving an appropriate regulatory framework.

Given the value of this survey, we will be looking at collecting further essential knowledge from across the Alliance over the coming year.

London, May 2017

\*ANAIAS (Mexico), ANDI (Colombia), APSKI Indonesia, BLL AK NEM Germany, CASP Czech Republic, Complementary Medicines Australia, Council for Responsible Nutrition (CRN) US, Food Supplements Europe, GOED (International), GTBD Turkey, HPA South Africa, Health Product Wholesalers' Association Finland, Health Products, Health Supplements Industry Association Singapore, IADSA Working Group India, IADSA Working Group Taiwan, IASC (International), Integratori Italia, JIHFS (The Japanese Institute for Health Food Standards), MADSA Malaysia, Natural Products NZ, Serbian Chamber of Commerce, UDSP Russian Federation, Vietnam Association of Functional Foods

THE MAJORITY  
THINK THEIR  
COUNTRY/REGION  
IS ON THE RIGHT  
TRACK

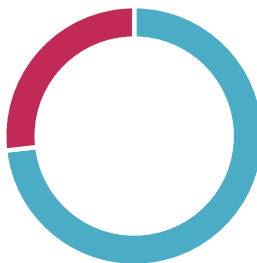
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## WORLD

Generally speaking, would you say that **regulation** for the supplement sector is heading in the right direction in your country?

71%

Right Direction



Right Direction

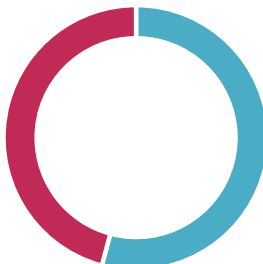


Wrong Direction

Generally speaking, would you say that **policy** for the supplement sector is heading in the right direction in your country?

54%

Right Direction



Right Direction



Wrong Direction

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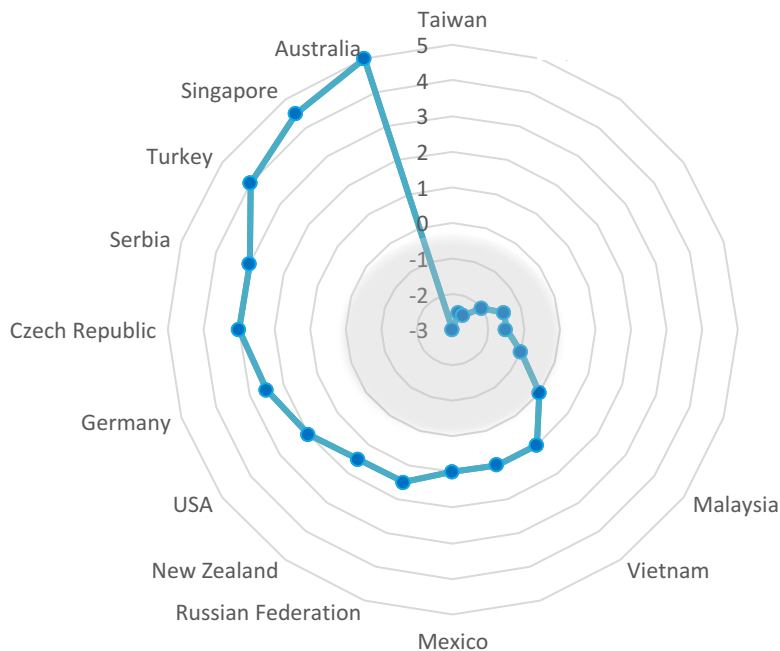
It is encouraging that 71% of the respondents consider that regulation is heading in the right direction, despite the clear challenges that exist in many countries that still require close attention and engagement. It is clear that over the past decade of consistent investment by the sector the food supplement category has received greater recognition and acceptance.

However, recognition of the role and value of supplements has not yet reached the same level in the policy arena. This shows the importance of investment by the sector in wide-ranging studies to demonstrate the contribution of supplements to public health.

## NATIONAL

How fairly do you feel supplements are treated in legislation in your country?

Ranking -5 [unfairly] to +5 [Fairly], 0 [Neutral]



### TOP COUNTRIES

- Australia
- Singapore
- Turkey

### TOP REGION

- ASEAN

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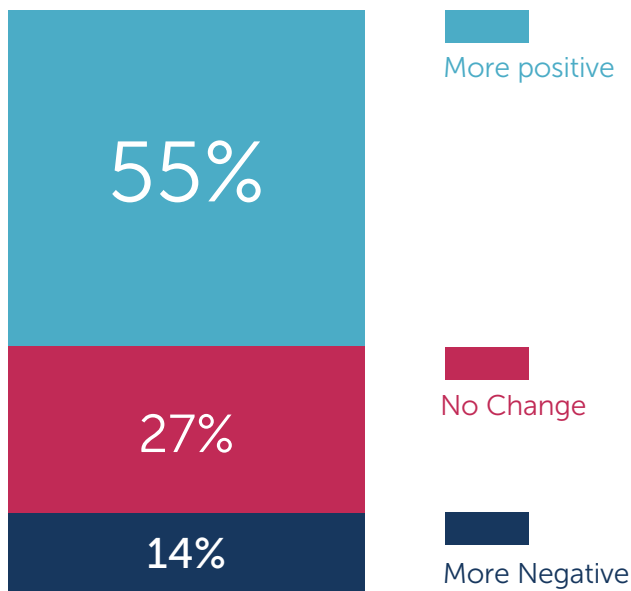
In general terms, it would appear that the acceptance and support for the sector also relates to how fairly the products are perceived to be treated. Governments which are in general open to discuss issues with an association in a spirit of cooperation (eg Australia and Singapore) in general appear to be treating products more fairly. It would also appear that in those countries where a government looks almost entirely at consumer protection and there is little to no interest in growth, innovation and export for example, the government is also more likely to be considered to be unfair.

In addition, where there is a regular and consistent programme of engagement with the authorities (eg Turkey), there appears to be a greater willingness to treat the category in a fair way.

## WORLD

Has the attitude of policy makers in general become more positive or negative about supplements over the last two years in your country?

The majority of the sector think that the attitude of policy makers has positively changed over the last two years



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It is of course very encouraging that 55% consider that attitudes have improved over the past two years and only 14% consider this more negative. The greatest negativity is felt in the EU and the US. For example, in the EU the Claims Regulation and the way it is now being implemented has had a major negative impact on perceptions of regulators.

## WORLD

How concerned you are about the following issues in your country?

ADULTERATION  
AND FRAUD

63%

..... Respondents feeling  
highly concerned (>70%)

Most concern: TURKEY

ANTI-SUPPLEMENT  
MEDIA

50%

..... Respondents feeling highly  
concerned (>70%)

Most concern: GERMANY,  
NEW ZEALAND

CHANGING OFFICIALS  
IN GOVERNMENT

33%

..... Respondents feeling highly  
concerned (>70%)

Most concern: SERBIA,  
VIETNAM

LACK OF UNDERSTANDING  
OF THE CATEGORY  
AMONG REGULATORS

46%

..... Respondents feeling highly  
concerned (>70%)

Most concern: SOUTH  
AFRICA, VIETNAM

NEW LEGISLATIVE  
DEVELOPMENTS

46%

..... Respondents feeling  
highly concerned (>70%)

Most concern: CZECH  
REPUBLIC, NEW ZEALAND

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63% of respondents are highly concerned about adulteration and fraud, more than any other issue covered in the survey. In Turkey, the highly restrictive legislation that was due to be implemented 3 years ago before IADSA engaged, was due almost entirely to the widespread adulteration and fraud in the market place. Unfortunately, even though the legislation is now on the right track, adulteration and fraud continues openly. In South Africa, the challenging regulatory framework that the authorities are looking to implement is also partially due to these issues. It is important now to look to gain a deeper understanding of the concerns of the sector and authorities on these topics.

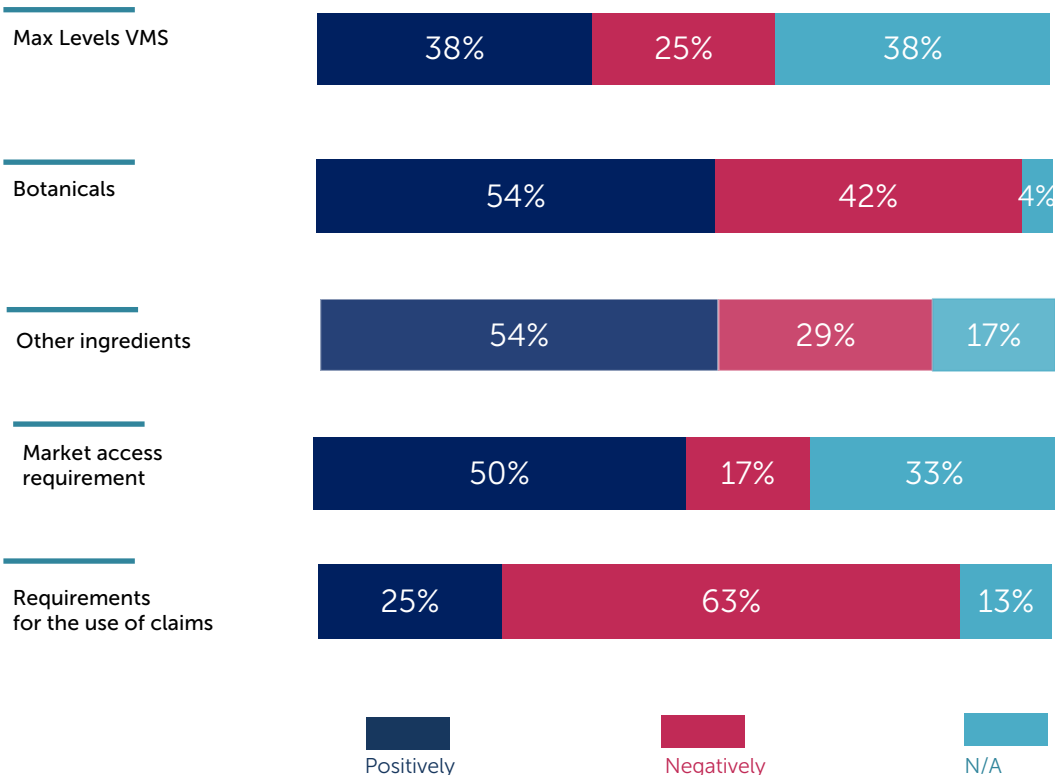
The two topics of 'changing officials' and 'lack of understanding of the category' are linked and are significant in determining the right or wrong direction of regulation. It is clear that with nearly 50% worried about regulators not understanding the sector, a great deal of educational work is required.

WHAT IS THE SUPPLEMENT SECTOR  
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## WORLD

Which of the following regulatory issues are today positively or negatively impacting the supplement category in your country?



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In general, the survey shows that perceptions of positive or negative change depend on the starting point. For example, in the EU, the claims regulation is perceived negatively. On the other hand in Turkey, where no claims were previously legally permitted, the implementation in Turkey of the EU claims regulation with many vitamin and mineral claims is seen as a positive development.

It is interesting that today the maximum levels of vitamins and minerals is far less as important an issue than the other topics, which reflects a dramatic swing from 10 years ago and demonstrates the importance of Codex in helping switch and secure a different mindset among decision-makers.

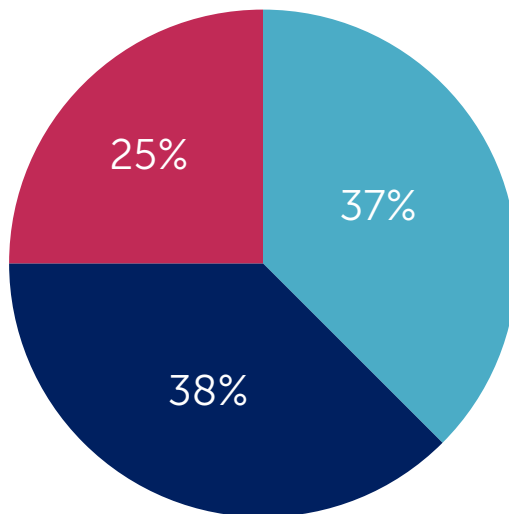
## NATIONAL

Which of the following regulatory issues are today positively or negatively impacting the supplement category in your country?



## WORLD

What do you believe will be the tipping point for governments to recommend supplementation more broadly?



- Healthcare cost crisis
- Increasing proof of undernutrition among the general adult population
- Growing elderly population

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