

Global Nutritional Supplements Market Dynamics Report

Q3 2026

Trends, Compliance, and Structural Opportunities

2026

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Market share of global dietary supplement sales

TABLETS

32.92%

GUMMIES

8.88% CAGR

POWDERS

8.83% CAGR

1.1. Growth has not slowed, but the definition of growth is changing.

The global dietary supplement market will be approximately US\$203 billion in 2025, and Straits Research predicts that it will reach approximately US\$434 billion in 2034, with a CAGR of approximately 8.8%. In 2025, the Asia-Pacific region will overtake North America to become the largest regional market, with a 49.48% share; yet, **the truly significant question is not "who is the largest," but rather "who is defining the way growth happens."**

1.2. Dosage forms are shifting from being a "vehicle" to becoming a "strategy."

Tablets still account for 32.92% of global sales, but gummies are catching up with a CAGR of 8.88%, and powders are the fastest growing form with a CAGR of 8.83%. This is not a change in packaging, but a migration in consumption scenarios.

1.3. Compliance is shifting from a "cost item" to a "filter."

The regulatory developments in Q3—the ban on **Andrographis paniculata**, the notification regarding NMN in India, the FDA's focus on quality control for gummy supplements, and the proposal to make GRAS (Generally Recognized As Safe) status mandatory—all point in the same direction: the market is shifting the fundamental question from "Can this product be made?" to "Who is qualified to make it?"

The industry theme for Q3 2026 is not "growth," **but rather a realignment of the structure of growth.**

2.1. Regional Landscape: Asia-Pacific Ascends, Yet the Power to Define "Mature Markets" Remains Elsewhere

In 2025, the Asia-Pacific region emerged as the largest regional market for dietary supplements, accounting for a 49.48% share. This growth is primarily driven by the expansion of the middle class in China and India, alongside government-led preventive health initiatives. Meanwhile, the established markets of North America and Europe remain highly significant; **their value lies not in their growth rates, but in their capacity to set product standards, define regulatory compliance thresholds, and command brand premiums.**

The Middle East and Africa represent the fastest-growing region, with a CAGR of 7.83%; the United Arab Emirates' free zones and tax incentives are attracting brands from Europe and North America to relocate their production capacity and distribution hubs to the region.

2.2. Product Category Mix: Vitamins for Stability, Probiotics for Growth

Vitamins and minerals remain the largest product category, accounting for a 45.36% share of the U.S. market. However, probiotics are the fastest-growing segment, with a compound annual growth rate (CAGR) of 9.21% and a projected global market size of \$29.44 billion by 2025. Within the botanical supplements category, multi-ingredient formulations are growing at a CAGR of 9.12%, reflecting a shift in **consumer preference from "single-ingredient" products toward "all-in-one" solutions with multiple benefits.**

A notable signal: Enzyme supplements have emerged as the fastest-growing subcategory in the U.S. market, with a CAGR of 7.86%—a trend potentially linked to rising demand for digestive support alongside the expanding user base for GLP-1 medications.

Trend 1:

Tablets remain, but their status as the "default option" is beginning to waver.

Tablets account for 32.92% of global dietary supplement sales; their inherent advantages—low cost, long shelf life, and precise dosage—remain highly relevant from a B2B manufacturing perspective. However, a clear shift in consumer preference is underway: gummies are growing at a compound annual growth rate (CAGR) of 8.88%, while powders—with a CAGR of 8.83%—have emerged as the fastest-growing product format.

The growth in powdered supplements is primarily driven by sports nutrition and customizable nutrition—consumers increasingly prefer to mix supplements into beverages, shakes, or food, rather than simply "swallowing a pill." This means that the competition for powdered supplements comes not from other supplement formats, but from the broader landscape of everyday consumption, **including protein powders, meal replacements, and functional drinks.**

Trend 2:

Powdered products show the fastest growth, but the driving force lies elsewhere—not in "supplements."

Trend 3:

The "precision issue" with gummy supplements is finally being addressed.

A key signal from Q3: **The FDA has begun focusing on the production and quality control of gummy supplements.**

In a perspective piece published in the **Journal of Dietary Supplements**, the FDA's Office of Dietary Supplement Programs highlighted challenges related to formulation, manufacturing, and analysis—specifically, the degradation of certain ingredients during the heating of the gummy matrix, the complications that a sticky, viscous form introduces to testing, and the potential for increased microbial susceptibility due to higher water activity. **Competition in the gummy market is shifting from a simple question of "does the product exist?" to "is the dosage accurate, and is it stable throughout its shelf life?"**

Trend 4:

Gels and Novel Delivery Forms

According to data from Innova Market Insights, gels are the fastest-growing format for new supplement product launches, with a compound annual growth rate (CAGR) of 23% (projected for the period from July 2021 to June 2026). The South Korean brand RIN has introduced the concept of "Glow Strips" to the UK market—paper-thin, passion fruit-flavored strips that dissolve instantly upon contact with the tongue. Containing 80mg of liposomal glutathione, vitamin C, and collagen, these products are positioned on beauty shelves rather than in the supplement aisle. This "de-supplementing" channel strategy is noteworthy.

The true meaning of dosage form innovation: when supplements find their way into office desk drawers, gym bags, or bedtime routines, they cease to be perceived as "medicine." The rise of gels, strips, and instant-dissolve powders is, at its core, a response to shifting consumption contexts—a change that is compelling innovation in how these products are delivered.

04. Trends in Ingredients and Product Categories

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4.1. Creatine

Fastest growth, but the "dominance of powders" is beginning to wane.

Creatine was the fastest-growing supplement subcategory in the U.S. market during the third quarter, with its market share increasing year-over-year. The scientific evidence supporting creatine has expanded beyond athletic performance to encompass brain health, skin health, women's health, and sarcopenia. However, the core challenge lies in product differentiation. In terms of delivery formats, powders remain the dominant form for creatine sales, **though gummies and capsules are contributing to incremental growth by appealing to consumers who prioritize convenience.**



4.2. protein

The consumer profile is changing.

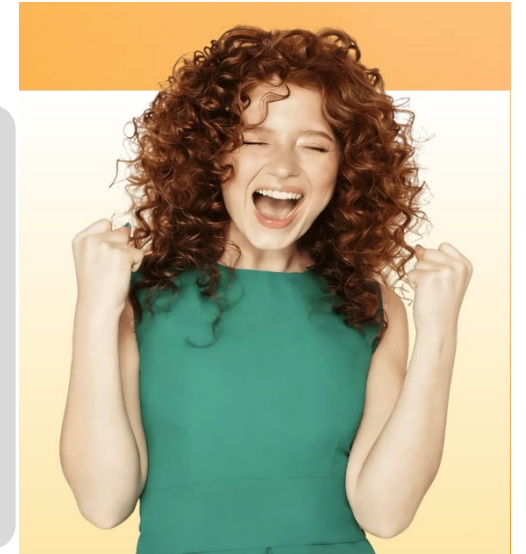
The "2026 Functional Nutrition Market Outlook Report," published by OC&C Strategy Consultants in September 2026, reveals a key insight: while traditional muscle-building enthusiasts and sports fans account for only 20% of functional nutrition consumers, they contribute 30% of total spending. A more significant growth opportunity lies with the remaining 80%—individuals focused on an active lifestyle, weight management, and general health. This group is not seeking to build muscle; rather, they are looking to "support healthy aging, manage weight, and prolong the feeling of fullness." Consequently, **the messaging for protein-based products must shift from a focus on "performance" to one centered on "everyday health markers."**



4.3. Magnesium

Magnesium glycinate is taking market share from magnesium oxide.

Competition in the magnesium supplement market is shifting from a simple "contains magnesium or not" focus toward "which type of magnesium, in what form, and for what specific use case." While magnesium oxide still holds the largest market share for any single product type, magnesium glycinate is the fastest-growing form. In terms of delivery format, powders are seeing the most rapid growth, boasting the highest compound annual growth rate (CAGR). This trend is driven by a clear realization among consumers that "different forms of magnesium yield different effects"; thanks to its high absorption rate and excellent tolerability, magnesium glycinate is perfectly positioned for applications centered on sleep support and relaxation.



4.4. Fish oil supply disruption

The "window of opportunity" for algal oil is closing.

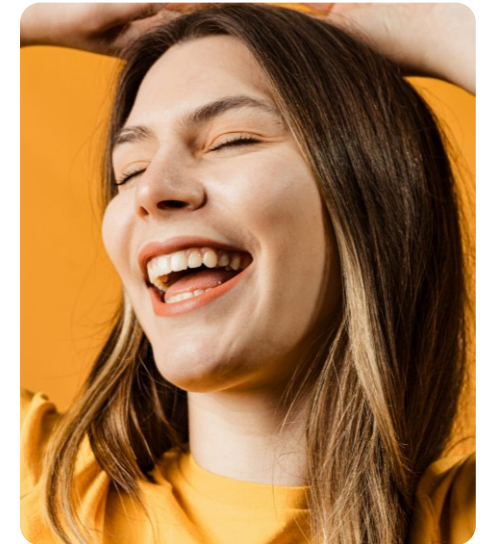
In its October forecast, IFFO projects that global fish oil production will fall to 1.15 million tonnes in 2026—a 15% year-on-year decline and the lowest level since 2016. A total fishing ban has been imposed for the second season in Peru's north-central region, where anchovy biomass has dropped by 27.9% compared to the summer, with juveniles accounting for as much as 79% of the stock. Meanwhile, the FOB price for crude, aquaculture-grade fish oil has surged by approximately 220% year-on-year. **The role of algal oil has shifted from being a "premium upgrade" to serving as a "supply safeguard."** However, this substitution does not happen automatically; algal oil must prove itself across three dimensions: cost, stability, and consumer awareness. Developments in the third quarter have focused on "production capacity deployment" rather than "market substitution."



4.5. Probiotics

Probiotics and Gut Health: From Supplements to Everyday Beverages.

The market for probiotic sparkling water is projected to grow from €1.6 billion in 2020 to €2.6 billion by 2025, representing a compound annual growth rate (CAGR) of 10%. Meanwhile, the market for probiotic supplements is set to expand from €6.2 billion to €9.4 billion, with a CAGR of 8%. A more significant trend is the shift in distribution channels: fiber and prebiotics are moving beyond capsules and powders into sparkling water, functional beverages, yogurt, and fortified foods—finding their way onto the shelves of mainstream grocery stores and convenience shops. **For gut-health products, the primary competition is no longer other supplements, but rather conventional beverages.**



4.6. Iron, Zinc, and Selenium



Gummies are reshaping the dosage form landscape for zinc, iron, and selenium.

Data from China's Taobao/Tmall ecosystem shows that by July 2026, the share of gummy supplements for zinc, iron, and selenium had risen to 39.1%, surpassing oral liquids and tablets to become the leading dosage form. While oral liquids still account for 30% of the market, their share has declined by 47.5% compared to the beginning of the observed period. The drivers are clear: gummies cater to the demand for accessible, foundational supplementation, whereas oral liquids are positioned for the premium segment. Globally, chelated forms (such as iron bisglycinate) offer an absorption rate 2–4 times higher than that of sulfates, commanding a price premium of 3–5 times. "Superior absorption" is emerging as a new competitive dimension in the micronutrient category; as a delivery vehicle, **gummies uniquely enable a combination of "high absorption" and "great taste."**

5.1. Ban on *Andrographis paniculata*

Regulation of botanical ingredients is shifting from a "case-by-case" approach to a "category-based" one. Effective September 17, 2026, the TGA will prohibit the use of *Andrographis paniculata* (green chiretta) in new listed medicines due to the risk of allergic reactions. For existing products, voluntary cancellation of registration or product recalls is advised. While the industry body CMA has expressed disappointment, the regulatory stance is now set. The impact on brands: regulatory scrutiny of botanical adaptogens and herbal ingredients is shifting from an "individual ingredient" focus to a "category-level" approach. **Key ingredients in supplements for emotional well-being—such as *Withania somnifera* (ashwagandha), which accounts for 18.6% of the raw material market—are facing direct pressure.**

GRAS notification set to become mandatory; quality control for gummies receives greater attention.

The FDA has proposed transitioning the voluntary "Generally Recognized as Safe" (GRAS) notification system into a mandatory one, a move designed to grant the agency greater visibility into substances that companies have self-determined to be safe. Concurrently, the FDA has published an article in an academic journal highlighting the challenges associated with the production and quality control of gummy supplements. **The signal is clear:** the U.S. market's tolerance for "self-determined" safety is narrowing, and the compliance threshold for gummy products is shifting from merely being "able to manufacture them" to "being able to manufacture them correctly."

5.2. FDA

5.3. India

NMN is explicitly prohibited.

The FSSAI has issued notices to two companies, clarifying that NMN is an "unapproved ingredient." Although NMN is commonly found on Indian e-commerce platforms, the regulatory stance is now clear. **This serves as a warning for cross-border brands:** the global regulatory landscape for NMN is becoming fragmented, and the fact that a substance is "permitted in one country" cannot be used as a universal basis for compliance.

5.4.China

Draft New Regulations for Probiotics.

The State Administration for Market Regulation (SAMR) has drafted new regulations governing the filing and registration procedures for health foods containing probiotic ingredients. Key changes include raising the minimum Colony-Forming Unit (CFU) requirements throughout the product's shelf life, and mandating clear documentation regarding the functionality and genetic stability of the specific strains used. **The takeaway:** the concept of "strain specificity"—often used in marketing—will now shift to become a primary focus of regulatory compliance reviews.

Relaxation of Rules for Export-Related Claims.

New Zealand has announced that dietary supplements intended for export may carry therapeutic claims in accordance with the requirements of the destination country, and will be exempted from local maximum daily dosage limits for food additives, vitamins, and minerals. This signals a divergence in regulatory approaches: while Europe is tightening its regulations, New Zealand is easing them to facilitate an export-oriented strategy. Brands must therefore tailor their compliance strategies to individual markets, rather than relying on a "one-size-fits-all" global standard.

5.5. New Zealand

5.6. Cross-border e-commerce supervision

Beneficial to compliant, leading players.

A research report from Orient Securities notes that since 2026, regulation of cross-border e-commerce in China has tightened, with a primary focus on curbing false claims regarding product efficacy and misleading representations of foreign origin. The prevailing market structure—characterized by a high share of unbranded ("white-label") and private-label goods—is beginning to shift. As industry concentration increases, the trend will favor compliant, leading brands that have established a deep footprint in overseas markets.

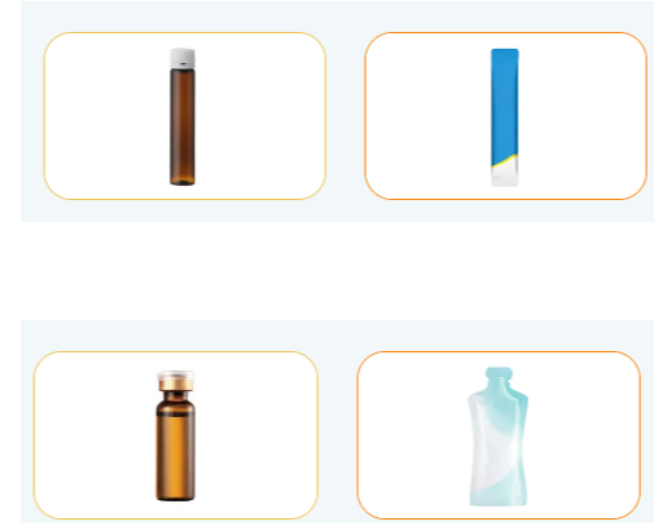
06. Consumer Insights

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6.1. healthy

Health considerations drive decision-making, yet the definition of "health" is becoming more nuanced.

An OC&C report indicates that 85% of consumers state that health and well-being considerations strongly influence their food purchasing decisions. Top health goals include long-term health/healthy aging (21%), weight management (15%), and a healthier diet (14%). However, "healthy aging" is no longer a vague notion of simply "living longer"—it is now being broken down into specific sub-goals, such as joint health, heart health, cognitive function, and the maintenance of muscle mass.



6.2. Sleep

40% of people want it, but only 32% are taking action.

A PwC survey of 21,808 consumers across 27 countries reveals that 40% identify improving sleep as a primary health goal; however, only 56% rate their current sleep quality as good, and just 32% actively track their sleep and take corresponding action. **This gap between the market potential for sleep supplements and actual consumer behavior presents a significant opportunity for consumer education and the cultivation of new habits.**

6.3. Active Demand

"Active Demand" Revealed by Search Behavior

By early 2026, search interest related to GLP-1 had surged to nine times its baseline level, with concurrent spikes in searches for terms such as cortisol, self-care, supplements, protein-rich diets, fiber, and probiotics. Consumers are not merely being "marketed to"—**they are actively seeking out solutions.**

07. 4UNUTRA's Actions

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Matching Point 1:
Dosage form capability is shifting from an "added bonus" to a "mandatory requirement."

Competition in dosage form capabilities is shifting from a focus on "format" to one of "precision." 4UNUTRA's dosage form platform possesses the R&D strengths required to establish verifiable capability benchmarks centered on "precision."

Point 2: The value of prioritizing compliance was repeatedly validated in Q3.

An indispensable step in the product development process: **identifying regulatory risks, providing alternative solutions, and offering recommendations on dosage form compatibility—all during the formulation stage.**

Alignment Point 3:
Supply chain resilience is an issue that clients cannot see, yet it remains a source of anxiety for them.

The lesson from the rise in fish oil prices is that the cost of raw materials can, overnight, alter the economics of an entire product category. **Translating "trends" into "deliverable capacity"** is a vital component of a resilient supply chain.



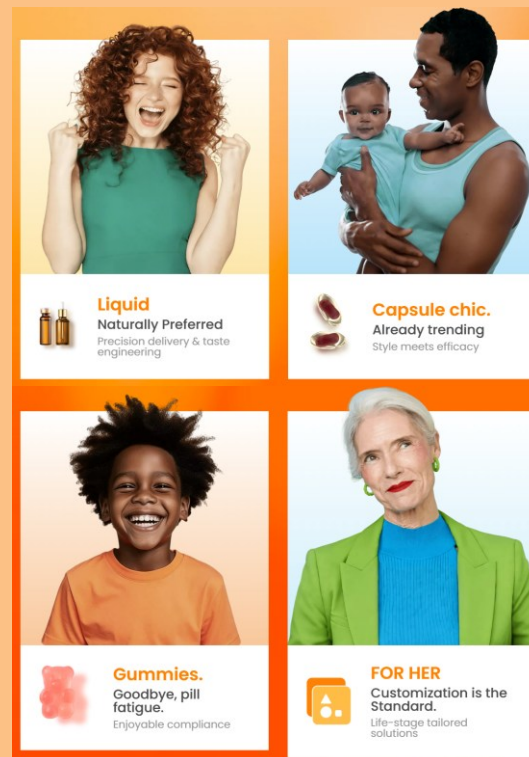
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