This factsheet is prepared in order to support the understandings of potentials from global markets of Medicinal & Aromatic Plants (MAPs) and MAP products.

Products covered in this factsheet are:

1) Ingredients:
   - Medicinal & Aromatic Plants
   - Extracts
   - Vegetable alkaloids

2) Final products:
   - Herbal medicinal products for human use
   - Food supplements

Trade Value (2012, billion $)

- Global herbal products: 118 billion $
- Agricultural products in America & Europe 27, Brazil, Canada: 200 billion $

Data sources:
- WHO, 2014: Trade value of ONLY herbal medicines 60 billion $ at growth 7%/year
- FAO statistics, 2012

World population 2014
Approximately 7.2 billion

Source:
- United Nations, 2014
- WHO, 2014

- People relying their lives mainly on plants: 0.9 billion (12.5%)
- The rest of world population: 6.3 billion (87.5%)
Import value of MAPs and Extracts

**Import values: United States**
51,200 tons of pharmaceutical plants | $139m
Population: 323,687,784

**Import values: United Kingdom**
10,000 tons MAPs | €54m
5,000 tons extracts | €57m
Population: 65,038,676

**Import values: Poland**
9,700 tons MAPs | €23m
export 16,400 tons MAPs | €54m
Population: 38,596,527

**Import values: France**
€176m
19,000 tons MAPs | €78m
8,000 tons extracts | €98m
Population: 64,618,333

**Import values: Spain**
18,000 tons MAPs | €51m
5,000 tons extracts | €48m
export 14,500 tons MAPs
14,000 tons extracts | €100m
Population: 46,074,899

**Import values: Netherlands**
18,000 tons MAPs
Population: 16,969,748

**Import values: Germany**
65,000 tons MAPs | €201m
5,000 tons extracts | €124m
Population: 80,683,471

**Import values: Italy**
12,000 tons MAPs
Population: 59,808,494

**Import values: Japan**
46,450 tons of pharmaceutical plants | $131m
Population: 126,368,677

**Import values: Republic Korea**
33,500 tons of pharmaceutical plants | $49.9m
Population: 50,466,088

Data sources:
- COMTRADE database, United Nation Statistics Division, New York
- CBI | Market Intelligence www.cbi.eu/market-information/natural-ingredients-health-products
- Population numbers, UN statistics, April 2016

Year of data sources:
* 2014
** 2003
Market Size and Market Interests

**United States**

**Netherlands**
- 45% of physicians consider homeopathic medicines effective and 47 percent of medical doctors use one or more complementary therapies, with homeopathy (40 percent of these select doctors) being the most popular.*

**United Kingdom**
- More vitamins and dietary supplements are taking over the market share while (herbal) remedies are declining in sales.
- (2013) herbal product market: £ 485 million = € 668m.

**Poland**
- Poland represents the largest market in Eastern Europe for (herbal) medicine and food supplements.
- (2013) € 600m.

**France**
- Nearly 40% of consumers resort to natural health products.

**Italy**
- Italian herbal medicinal products market, which is smaller than in Germany and France, is dominated by traditional Western herbal medicinal products and, above all, homeopathic medicines. Italy has one of the largest markets for natural/organic cosmetics in Europe.
- (2007) € 100-120m.

**Spain**
- 33% of Spanish consumers having used homeopathic products, and an additional 27% using them on occasion or even regularly.
- (2014, Euromonitor) € 220m.

**Germany**
- 72% of the German population have used herbal medicinal products at some point in their lives.**
- (2008) 45,000 tons of medicinal plants are used. (2014) Self-medication herbal medicinal products Sales: € 1,084.

**Legend:**
- Preference to natural products
- Market value of natural Products/herbal medicinal products

**Data sources:**
** Institut Für Demoskopie Allensbach (2010).
Legislative & standard requirements for Exporters

Sustainability standards and guidance documents

Regulations in the US: Sanitary and safety regulations, Quality requirements/emerging and Established product certifications/labels

Good agricultural and collection practices • Bioterrorism Act • Phytosanitary certificates
Food colours • New Dietary Ingredients (NDIs) • United States Pharmacopeia Dietary Supplements Compendium (DSC)
United States Pharmacopeia (USP) • National Formulary (NF)

Regulations in the EU: Natural Ingredients, Herbal Medicinal Products and Food supplements

Good agricultural and collection practices • Access and Benefit Sharing (ABS) • Herbal Medicinal Products
EU legislation (Directive 2004/24/EC) • GACP and Good Manufacturing Practices (GMP) for natural ingredients
Common Technical Document (CTD) • European Directive on Traditional Herbal Medicinal Products (THMPD)
EU food supplement legislation • EU General Food Law for food safety • National positive lists • BELFRIT

Data sources:
* International Trade Center, December 2009, MEDICINAL PLANTS AND EXTRACTS MARKET NEWS SERVICE (MNS), QUARTERLY EDITION
** International Trade Center, 2012, THE NORTH AMERICAN MARKET FOR NATURAL PRODUCTS
*** CBI, Market Intelligence, August 2015, Buyer Requirements Natural Ingredients for Health Products in Europe
MAP-EXPO 2017 Eindhoven, the Netherlands

**Strategic Locations for meeting points:**

**Airports within:**
- Eindhoven Airport, the Netherlands: 10 km
- Schiphol Amsterdam, the Netherlands: 110 km
- Düsseldorf, Germany: 120 km
- Brussels, Belgium: 130 km

**European Capitals nearby:**
- Eindhoven, the Netherlands: 120 km
- Düsseldorf, Germany: 120 km
- Amsterdam, the Netherlands: 123 km
- Brussels, Belgium: 130 km
- Paris, France: 360 km
- London, UK: 390 km
- Berlin, Germany: 560 km

**Strategic Locations for logistics:**

**Largest EU Harbors nearby**
- Eindhoven, the Netherlands: 88 km
- Antwerp, Belgium: 110 km
- Rotterdam, the Netherlands: 472 km
- Hamburg, Germany: 472 km
Supply chain of MAPs

MAP-EXPO Target Exhibitors

Inputs and Support Industries
- Planting materials
- Cultivation / Harvesting / Collection
- Extraction
- Conversion
- Packaging
- Preservation

Raw MAPs
- Herbal Substance
- Herbal Preparation
- Spices
- Teas

Active ingredients
- Food & Drink Ingredients
- OTC Pharmaceutical products
- Essential oils, Resins, Powder Herbal, Material, Gels, Tinctures, Syrups, Fatty Oils, Fresh Juices, Gums, Suspensions, Creams

Medicinal Products
- Herbal Medicinal Product
- Other medical products

Private labels
Contract manufacturing
Distributors
End users
Wholesalers / Im-exporters
Retailers / Pharmacies / Hospitals

Various parts of plants (flowers, buds, seeds, leaves, twigs, bark, woods, fruits, and roots), either ground or whole (in infusions)

MAP-EXPO 2017
Venue and date
Beursgebouw Eindhoven, Lardinoisstraat 8, Eindhoven, The Netherlands
Wednesday, 29 - Thursday, 30 March 2017
Opening hours
Wednesday: 10:00 - 17:00
Thursday: 10:00 - 17:00
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