

Assessment for the Use of Nutritional Support in Turkey

Ayşenur KOÇ^{1*}, Kübra Erdoğan², Nazan Arslan², Sıdıka Büyükhelvacıgil Öztürk³, Ali Ayşakar⁴ and Beril Koparal⁵

¹Zade Vital® Natural Supplements, Trade Marketing Department, Molecular Biologist, İstanbul, Türkiye.

²Zade Vital® Natural Supplements, Trade Marketing Department, Biologist, İstanbul, Türkiye.

³Zade Vital® Natural Supplements, Zade® & Zade Vital® İbn-i Sina R&D, Chemical & Biological Engineer, Business Development Specialist, İstanbul, Türkiye.

⁴Zade Vital® Natural Supplements, Zade® & Zade Vital® İbn-i Sina R&D, Business Development Manager, Internal-External Trade/Contract Manufacturing- Private Label, İstanbul, Türkiye.

⁵Zade Vital® Natural Supplements, General Menager/Zade® & Zade Vital® İbn-i Sina R&D Director, İstanbul, Türkiye.

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***Correspondence:**

Ayşenur KOÇ, Zade Vital® Natural Supplements, Trade Marketing Department, Molecular Biologist, İstanbul, Türkiye, E-mail: akoc@zade.com.tr.

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ABSTRACT

Dietary supplement market is growing in Turkey. Local and multinational companies develop and introduce many new products for Turkish dietary supplements market. However, in marketing literature, a few academic researchers could be found regarding Turkish consumers' behavior about dietary supplements. Understanding the awareness and utilization rates of nutritional support products is important at the point of designing strategies for producers, the state and related organizations. This general exploratory research was carried out in 60 different pharmacies located in different regions of Turkey (Mediterranean, Black Sea, Eastern Anatolia, Southeastern Anatolia, Central Anatolia Region). Face-to-face interviews were conducted with 253 people aged 18 years and over from September 2017 to February 2018 (5 months). The data collected by the questionnaire includes the factors that affect the use of nutritional support products by respondents in the study, the recognition and consumption rates, the product content and how regularly they use it. Respondents were found to use products for immunity (21.03%) at the beginning of their nutritional support products usage. Omega 3 fish oil (26.98%), multivitamins (17.86%) and CoQ10 (7.94%) were the most preferred products. The rate of natural supplements usage by individuals who thought that use of natural supplements is crucial, is around %71.43.. We believe this study will lead to more detailed research on healthy lifestyle market in the future.

Keywords

Natural supplements, Pharmacy, OTC, Vitamins.

Introduction

In addition to the nutrients contained in our diet, additional dietary supplement products are stated as concentrated and extractable nutrients [1]. Food supplements have a wide range composed of vitamins, minerals, proteins, plants, plant-based ingredients, amino acids and similar compounds and their concentrates and

extracts [1]. These supplements can be in tablets, capsules, soft gel, gelatin capsules, liquid or powder [1]. In the United States, food supplements are described as non-smoking products, containing one or more vitamins, minerals, herbs or amino acids taken for the purpose of supporting the diet by DSHEA (Dietary Supplement Health and Training Department) [2].

Many international researches shows that multivitamin and minerals are the most commonly used nutritional supplements. On the other

hand, in adequate and balanced nutrition there is no need for food supplements. According to the results of our survey, the most preferred nutritional supplements are Omega 3 fish oil (26.98%), multivitamins (17.86%) and CoQ10 (7.94%) respectively. They represent an important area in the food supplement market for the preferred products in the immune area (21.03%).

Nutritional supplement products in our country are available in pharmacies as prescription or OTC (over the counter category), various personal care markets and other retailers (herbalists, supermarkets, etc.). Prescription drugs sold in pharmacies are approved by the Ministry of Health, and some products in pharmacies and other retail channels reach consumers under the supervision of the Ministry of Food, Agriculture and Livestock.

The Ministry of Food, Agriculture and Animal Husbandry and the Ministry of Health, by conducting coordinated works have made a joint announcement that they aim to change the public's perception of food supplements and nutritional supplement products as herbal medicine.

Use of Herbal Nutritional Supplements in Turkey and Worldwide
The history of use of herbal products are used for thousands of years [3,4]. According to a statement made by the World Health Organization (WHO), it is expressed that 70-80% of the world's population uses herbal supplements and support products in basic health care services [5]. It is stated that the United States spends 60 billion dollars each year in this area [6,7]. In Europe, it is stated that in 2003, 5 billion dollars were spent on the products sold "on the shelf" [8].

Considering the statistical studies conducted in this field, Italy is the leading country in the diet supplement market with a value of 1.4 billion euros in 2015. It is expected to rise to € 1.6 billion by 2020. Dietary supplements are a very profitable market with an increase in the value of sales throughout Europe. In developed countries, the dietary supplement market is growing and the variety of products is increasing. According to estimates, nearly half of the U.S. population uses nutritional supplements (Bailey et al., 2011). Euromonitor International expects the European nutritional supplement market to grow by 9.5% in 2020 from €7.2 billion to €7.9 billion (www.nutraingredients.com). Nutritional supplement products in our country are available in pharmacies as prescription or OTC (over the counter category), various personal care markets and other retailers (herbalists, supermarkets, etc.). Prescription drugs sold in pharmacies are approved by the Ministry of Health, and some products in pharmacies and other retail channels reach consumers under the supervision of the Ministry of Food, Agriculture and Livestock. The Ministry of Food, Agriculture and Animal Husbandry and the Ministry of Health, by conducting coordinated works, aim to inform the public of the food supplements and to take industry further.

It is considered that in our country, the survey will be one of the preliminary studies aimed at defining the dietary supplement products market which has started to find a new place in marketing

literature, and the consumer in this market.

Causes of Increased Use of Herbal Dietary Supplements

Many factors affect the frequency of use of herbal dietary supplement products. When these factors are examined, it is observed that the social, economic, physiological determinants of health and changes in society are prominent. The process change in the context of the concept of health has also paved the way for the increase in the use of herbal dietary supplements.

Today, treatment options are expensive; therefore not everyone can access to these options, obstacles to access to modern medicine [9]. Accordingly, there is an increase in the tendency of people to "raise individual solutions" for their health problems. In health systems, tendency of individuals to "natural" due to the transformation of social point of view to individual manner, the increase in the perception that "there is no problem of use as they are natural" has a positive effect on the use of nutritional support products. Given the increasing number of scientific investigations in this area, it was found that the use of herbal medicines manufactured in accordance with the GMP guidelines, in chronic diseases is expected to increase. For example, according to a study conducted in the United States, these medicines are being used to prevent memory loss, to relieve joint pains and to minimize fatigue [10].

In our survey, we questioned the criteria that individuals take into consideration when using nutritional supplements, and in relation to that, the reasons behind the increased use of these supplements. Since herbal supplements are of natural and herbal origin, the idea that they have low risks in terms of health is common in society. This perception is one of the important factors that increase the use of herbal products. Another factor is that herbal support products are placed in print and broadcast media (media) organs because they attract a lot of attention, and the interest in these products is increasing as they are placed. Advertising campaigns on radios, natural-harmless discussions in television programs, and almost "prescription" for the use of products, articles on the additional products given by the newspapers increase the use of these products.

Profile of People Using Nutritional Supplement Products

In the literature, there are studies conducted in many countries, especially in the USA and European countries, to identify the consumers of food supplement products according to demographic dimensions. The consumer survey conducted in Turkey in this context is extremely low.

With our survey, a user profile emerges when we look at the rates of use of food support throughout Turkey, and look at whether it is used regularly or not and especially when we examine products preferred. According to the results, users' living standards, awareness and awareness levels can be interpreted.

Nutritional Supplement Products in Turkey

The nutritional supplement products market in Turkey is growing. The estimated size of the market reached 735 million TL in 2016,

while the market is expected to reach 950 million TL in 2021 according to Euromonitor's data. Given that the World Nutritional Supplement Market size is 90 billion dollars, a significant increase is expected in Turkey as well (<http://www.trthaber.com>).

According to Euromonitor estimates, the biggest markets in Europe are the countries of Western Europe (mainly Italy and Germany), while the countries of Eastern Europe (Romania, Turkey, Bosnia Herzegovina, Russia and Macedonia) are the fastest growing and promising countries (www.htc.co.uk).

As in all over the world, in Turkey vitamins and other nutritional supplement products are sold without a prescription. No serious inspection is carried out and this lack of inspection leads to some health problems (www.hurriyet.com.tr). Our survey shows that state control plays an important role in addition to factors such as the level of consciousness of the user, pharmacist or physician recommendation, the role of the media, trust in the company and the brand.

Research Method

The Turkish nutritional supplement products market is growing day by day, but besides that, the marketing effort in the field of consumer behavior is extremely low. This study is an exploratory study on the awareness and consumption of food supplement users.

Research questions are as follows:

- **Do you use nutritional supplements?**
- **How important is it for you to have a natural source of nutritional supplements?**
- **Can you tell us what a nutritional supplement you're using?**
- **How regular do you use it?**
- **What factors affect your choice?**

This study was conducted with users from 60 different pharmacies throughout Turkey between September-December 2017 (4 months). 252 users from the pharmacy were asked to fill out the questionnaire during face-to-face interviews. There are a total of five questions in the survey. In the questions, the use of nutritional supplement products and the points that they pay particular attention to when using the products are desired to be emphasized.

It is considered that this research will also lead to causal research in the future of healthy lifestyle products market.

In order to determine the market for food support products and the use of pharmacists in our country; 252 people participated in pharmacies from different regions of Turkey (Black Sea, Mediterranean, Eastern Anatolia, Southeast Anatolia, Marmara). The questionnaire was filled with face-to-face interviews between September and December 2017 (4 months). As a result of the study carried out by taking the average values of the obtained data, it was determined that individuals were using more than one nutritional supplement product.

Results

Do you use nutritional supplements ? Individuals Using Nutritional Supplements	230	91,27%
Individuals Not Using Nutritional Supplements	18	7,14%
No comment	4	1,59%
Total	252	100,00%

Table 1: The Consumption Rate of nutritional supplements of Responders (%).

How important is it for you to have a natural source of nutritional supplements? Using Nutritional Supplements is Important	56	22,22%
Using Nutritional Supplements is Very Important	180	71,43%
Using Nutritional Supplements is Not Important	10	3,97%
No comment	6	2,38%
Total	252	100,00%

Table 2: Importance Levels of nutritional supplement Natural Sources of Products for Users (%).

Can you tell us what a nutritional supplement you're using? Immunity	53	21,03%
COQ10	20	7,94%
Multivitamin	45	17,86%
Omega	68	26,98%
Joint health	4	1,59%
Essential oils	3	1,19%
Gastrointestinal	1	0,40%
Appetite	1	0,40%
Weight control	4	1,59%
Multivitamin	45	17,86%
Probiotics	17	6,75%
Vitamin C	4	1,59%

Table 3: Preferred nutritional supplement Product Ratios for Responders (%).

How regular do you use it ? Regular	165	65,48%
Irregular	56	22,22%
Not using	31	12,30%
Total	252	100,00%

Table 4: Methods of Use of nutritional supplement Products for Responders (Regular-Irregular) Rates (%).

What factors affect your choice? Immunity	3	1,19%
Naturalness, advertisement, brand	16	6,35%
Advice of the pharmacist	13	5,16%
Price	14	5,56%
Trust	34	13,49%
Quality	24	9,52%
Advice of the physician	26	10,32%
In case of need	4	1,59%
Activity	42	16,67%
SGK refund	26	10,32%

Table 5: The Consumption Rate of nutritional supplements of Responders.

Discussion and Conclusion

Turkey is a rich country in terms of medicinal plants. If the use of various plant extracts as nutritional supplements is supported by scientific evidence, significant steps can be taken to create strong domestic brands in the market and to contribute to the country's economy. On the other hand, the decrease in drug expenditures is of great importance for today's economies. At this point, supporting the use of evidence-based herbal supplements will benefit the health economy and positively affect the health status of the public.

Since social media is used effectively in the communication of a large number of product groups, organizations should develop social media activities that will enable them to reach the right target audience and try to keep communication on these channels continuously. As expert advice plays an important role in the use of these products, information about the contents and contributions of the product should be shared with the doctor who may suggest these products and this information should be supported by scientific evidence. Due to quality of life and healthy life are the fastest growing trends, communication studies that consumers will be valued to share in mind and that food support products will be associated with these concepts should be carried out.

In Turkey, there are still many points about the consumption of nutritional supplements. More sensitive studies can be carried out at the point of giving training to our pharmacists, especially in OTC drugs which should be met with the consultancy of the health professional. In our study, the views and attitudes of the related pharmacists towards the product group can be examined with the help of qualitative research to be carried out with the consumers. In this study, questions were asked directly and rational answers were obtained. In future research, again, other cases that are effective in the use of nutritional supplements may be investigated. In future research, the reasons not to use these products can be investigated as well as those who use these products according to their way of Life by dividing the different segments can be understood in more detail.

According to the survey results, a majority of respondents (91.27%) expressed that they were using nutritional supplements. This ratio is very high. It doesn't reflect the general population in Turkey. Even in US where supplementation usage and awareness is high, the ratio is around 50. The reason for this high ratio is possibly related with the pharmacies where the study has been conducted. Especially A+ and A pharmacies are very strong in consulting their consumers about supplement usage. That is why we have observed a high ratio for supplementation usage. However this result is not the reality of the whole Turkish population. Besides it is nice to observe that even in some pharmacies, people are aware of supplementation usage.

Today, the use of social media in the choice of individuals who use food support, increase in treatment costs, increase in the philosophy of wellness (mental and physical well-being), increase in consciousness, pharmacy and physicians' consulting are very

important. When users are asked why they prefer nutritional supplements, the first (13,49%) is the confidence in the company. Product quality (9,52%) and physician recommendation (10,32%) are other reasons for use.

With the increase of the doctor and pharmacist's nutritional supplements suggestions, the public's confidence in the product will be increased. Since social media is used effectively in communication of many product groups, organizations should develop social media strategies that will enable them to reach the right target consumers and try to keep communication on these channels. As expert advice plays an important role in the use of these products, information about the contents and contributions of the product should be shared with the doctor who may suggest these products and this information should be supported by scientific evidence. Due to quality of life and healthy life are the fastest growing trends, communication studies should be carried out that consumers will be valued to share in mind and that food support products will be associated with these concepts. When we look at our survey results, it shows that Turkish brands in the market need to make more efforts in terms of Marketing, although advertising and brand awareness (6,35%).

In this respect, we can say that the awareness of individuals about nutritional supplement products and the increasing level of consciousness play an important role in the ethical behavior of media and manufacturers and the guidance of physicians. However, when it comes to human health, legal regulations are of primary importance. At this point, the coordination of the inspection by the two ministries is very important in protecting public health. In particular, people with high television watching rates and low education levels are closely related to the intensive communication of herbal mixtures and their perception of them as a kind of medicine carries important risks in terms of health. This risk is greater in nutritional supplement products that have not been inspected by the Ministry of Health. Many aspects of nutritional supplement products consumption in Turkey have not been studied yet; the views and attitudes of the related groups towards this product group can be examined with the help of qualitative research to be conducted with the brands, pharmacists, food support producers, physicians and consumers. In this study, questions were asked directly and rational answers were obtained.

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