FOOD SUPPLEMENTS MARKET · ALGERIA

A category people trust, but have not yet made a habit.

Food supplements have settled into the Algerian pharmacy without settling into a routine. Trust is won; regularity is not. That is where the category's growth sits.

WHAT WE MEASURED

Consumer arm	1,200 interviews · consumers who took supplements at least once in the past 6 months · all age groups · SEC A to D
Pharmacy arm	170 pharmacies · owners, managers and counter staff
Coverage	6 wilayas — Algiers, Tizi-Ouzou, Constantine, Sétif, Oran, Tlemcen
Collection method	Quantitative, CATI (computer-assisted telephone interviewing)

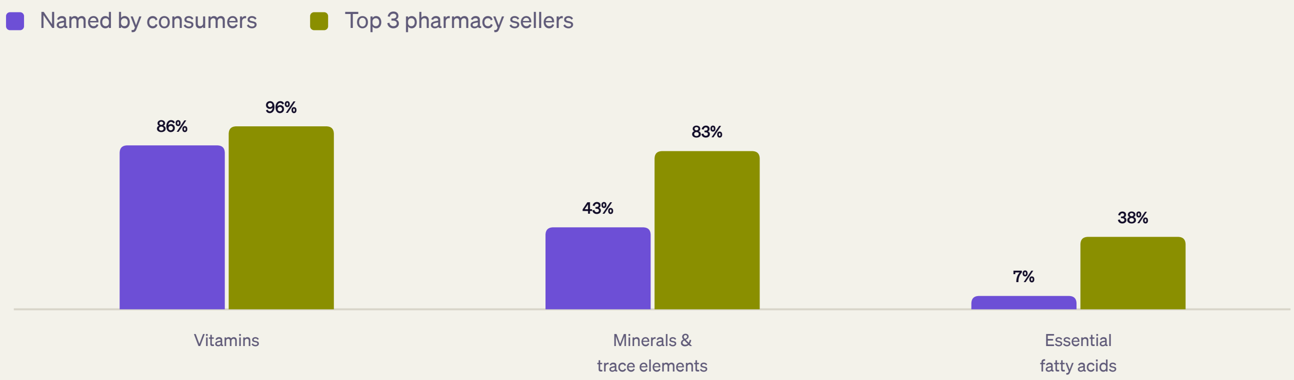
01 Trust is won. Regularity is not.

83% of consumers judge food supplements "useful", and stated trust reaches 3.90 out of 5. But 59% take them only as specific needs arise. Just 22% take them year-round, and 19% in seasonal courses. The category has won people over; it has still to win a place in their calendar.

02 Category knowledge stops at the first shelf.

86% of consumers name vitamins and 43% minerals and trace elements — and no other family exceeds 7%. Yet 83% of pharmacies place minerals among their three best sellers. Part of the demand is therefore not formed before the visit: it is formed at the counter.

What consumers know, what pharmacies sell



Consumers: families they say they know (n = 1,200). Pharmacies: families named among their three best sellers (n = 170).

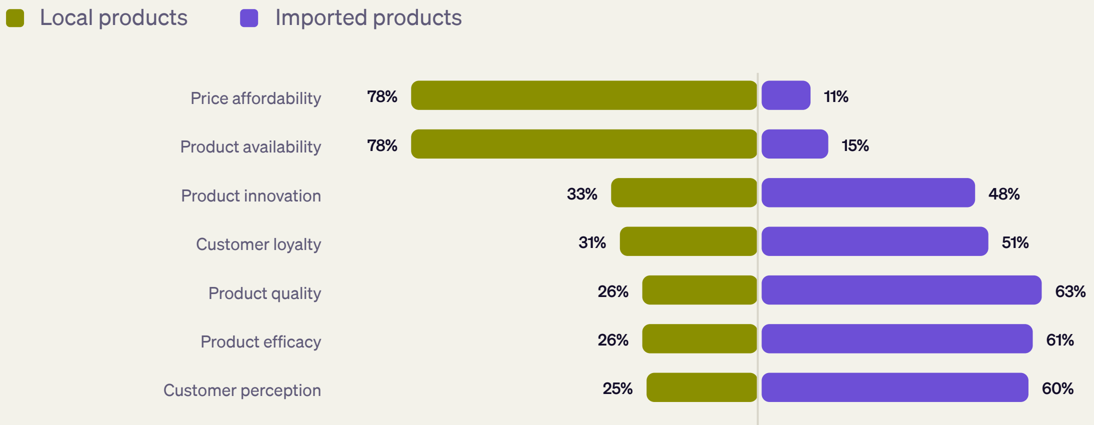
03 **The counter is the market — and it is under-used.**

80% of consumers name the pharmacy as their usual place of purchase, 13% the parapharmacy, 2% the internet. The category nonetheless accounts for only 21% of pharmacies' stated annual revenue — a market that 81% of them still judge promising or very promising, and that 68% describe as very dynamic or fast-growing. The room to grow is identified by the very people who hold the channel.

04 **What consumers say they want is not what triggers the sale.**

Asked about their choice criteria, consumers score "natural and risk-free" and "good for health" highest, tied at 4.36 out of 5; 86% consider naturalness important. Seen from the counter the ranking reverses: pharmacies believe what weighs with their customers is efficacy first (87%) and price (74%), with naturalness reaching only 53%. The gap between those two readings is a messaging space nobody occupies.

Local and imported are not fighting on the same ground



Origin each criterion corresponds to most, according to pharmacies (n = 170). The balance corresponds to "neither".

The results presented here are aggregated at category level. No brand-specific data and no competitive ranking is published in this document. The full study — including the brand, psychological-price and segmentation sections — is available from the institute.

WHAT THIS IMPLIES

01 **One more occasion, not one more consumer.**

The most accessible pool is not the non-consumer: it is the 59% who take supplements in bursts. Moving some of them onto a course raises volume without widening the base.

02 **The category's most effective medium is also its least contested.**

Only 20% of consumers say they saw or heard any advertising for food supplements in the past year. When eight in ten name the pharmacy as their usual place of purchase, the counter remains the category's principal point of contact — and it is largely vacant.

03 **Leaving the price argument behind means buying proof.**

Local products own affordability and availability; imported products keep perceived quality and efficacy. No campaign closes that gap on its own: it closes through demonstration, scientific backing and the pharmacist.