



# A practical guide to building a future proof Food Supplement & Nutrition strategy

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# 1. Executive summary



The Food Supplement and Nutrition (FSN) category is evolving rapidly, driven by changing lifestyles, demographic shifts, and rising consumer demand for targeted health benefits. No longer limited to sports powders or medical formulas, FSN now spans protein drinks, fortified juices, ready-to-consume snacks, and more. Across both Europe and the Benelux, consumers of all ages are embracing products that support immunity, focus, strength, and well-being.





This whitepaper explores the drivers behind this shift, from aging populations to post-pandemic health awareness and the influence of social media. It looks at how these trends translate into real consumer behavior, including who buys FSN, why, and what they expect from functional products. Furthermore, it includes a deep dive into protein's rise as FSN's flagship ingredient. Once associated mainly with athletes, protein now appeals to a wide range of users, from young adults and parents to older consumers and people managing specific health goals.

Beyond trends, this whitepaper also outlines the essential building blocks of a successful FSN strategy, from formulation and product testing to packaging, scaling, and supply chain resilience. Along the way, it illustrates how companies like Tetra Pak support producers in bringing these complex products to market, combining technical expertise with flexible production solutions and co-packing partnerships.

Whether you're launching your first FSN product or expanding into new formats, this whitepaper offers valuable insights into consumer behavior, formulation challenges, retail expectations, and go-to-market success factors, designed for the fast-evolving FSN landscape.

# 2

## Understanding FSN: categories and definitions

Food Supplement and Nutrition (FSN) refers to a growing category of purpose-driven products designed to deliver specific health and wellness benefits. These products go beyond traditional foods and beverages by offering targeted functional outcomes, from improved performance and immunity to nutritional support during specific life stages.

According to the European Commission<sup>1</sup>, food supplements are concentrated sources of nutrients or other substances with a nutritional or physiological effect, marketed in dose form (e.g., capsules, tablets, powders, liquids). When integrated with functional beverages and ready-to-drink formats, they fall under the broader FSN umbrella.

What sets FSN apart is its intention. These products are developed with a clear function in mind, often backed by nutritional science, and designed to meet a growing consumer demand for health-centric solutions. Unlike general wellness products, FSN offerings are explicitly formulated to deliver measurable benefits. This gives them a dual identity: they act as both food and a functional tool, playing a more proactive role in consumers' health routines.

Within FSN, four key segments define the landscape<sup>2</sup>. Each serves a different consumer need, but the boundaries are increasingly fluid, creating space for hybrid innovations:

### 1. Sports nutrition:

These products are designed specifically to improve physical and mental performance, such as gaining muscles, boosting energy levels, or increasing metabolic rates. Think of protein-enriched drinks, energy boosters, and electrolyte-replenishing formulas, such as isotonic drinks or hydration formulas that restore electrolytes lost through sweat<sup>3</sup>. The target audience ranges from professional athletes to everyday fitness enthusiasts looking for performance support.

### 2. Lifestyle nutrition:

Focused on daily well-being, this category includes products that promote energy, immunity, digestion, and mental clarity. Consumers here often lead busy lives and seek convenient, ready-to-consume options that align with healthy habits. Protein-enhanced dairy, vitamin-fortified juices, and gut-friendly drinks fall into this group.



### 3. Special nutrition:

These products are designed to meet the distinctive nutritional needs of individuals with health conditions, food intolerances, allergies, or dietary restrictions. They meet precise nutritional requirements and often comply with stricter compositional guidelines.

### 4. Medical nutrition:

These products are specifically formulated for the dietary management of medical conditions, diseases or nutritional deficiencies, administered under medical supervision. They are often regulated more strictly and require exact dosing and safe, shelf-stable delivery formats.

As consumer needs evolve, these categories are no longer fixed. For example, a protein drink may serve both a lifestyle and a sports purpose, while a fortified beverage may meet both medical and senior nutrition requirements. This flexibility opens the door to product differentiation and cross-category innovation, an opportunity many producers are just beginning to explore.

1. Food supplements. (z.d.).  
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2. Food supplement and nutrition. (n.d.).

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<https://www.tetrapak.com/fr-be/solutions/categories/food-supplement-and-nutrition>

3. Felman, A. (2024, 9 december). What are electrolytes and what do they do?

<https://www.medicalnewstoday.com/articles/153188#sources>



# 3

## The state of the market: key data for the Benelux

The FSN market continues to expand across Europe. According to Technavio<sup>4</sup>, the European nutrition supplements market is projected to grow by **USD 21.6 billion** between 2023 and 2028, with a compound **annual growth rate (CAGR) of 5.6%**. This steady growth reflects an increased focus on proactive health management across regions. In fact, the most recent Tetra Pak Index<sup>5</sup> reveals that **70% of global consumers** say they pay more attention to their health than they did a few years ago.

# 70%

of respondents indicated that New Food innovations are important to very important to their businesses



## 3.1 A growing shift toward health-first consumption

### 3.1.1 The Netherlands

That shift is clearly visible in the Netherlands. According to a study by Panel Inzicht and DPG Media<sup>6</sup>, a healthy lifestyle plays an important role for 88% of Dutch consumers. For many, this includes the use of nutritional supplements: 61% take them to support their diet.

Additionally, 1.7 million Dutch consumers, around 12% of the population, regularly use sports supplements, according to research by Multiscope<sup>7</sup>. On average, users consume these products 16 days per month. Men show a higher adoption rate than women (15% versus 8%). Usage is highest among 18- to 34-year-olds, with 31% of this group including sports supplements in their routines. In contrast, only 10% of those aged 35 to 49 and just 2% of consumers over 50 report using them. Protein remains the most widely used supplement, consumed

by 80% of users. Creatine comes next at 47%, followed by caffeine-based pre-workouts at 27%. Hydration-supporting options like isotonic drinks (13%) and electrolytes (11%) are also popular.

What drives Dutch consumers to choose one product over another? The most important factors include proven effectiveness, high quality, and fair pricing<sup>8</sup>. Younger generations also pay close attention to online reviews: one in three Dutch consumers under 35 considers reviews crucial when selecting supplements, compared to just 5% of older consumers.

4. Technavio. (z.d.). Nutrition Supplements Market Analysis Europe - Size and Forecast 2024-2028.

Technavio, <https://www.technavio.com/>, All Right Reserved 2025. <https://www.technavio.com/report/europe-nutrition-supplements-market-analysis>

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<https://www.tetrapak.com/en-nl/insights/tetra-pak-index/> // Tetra Pak Index. (n.d.-b). <https://www.tetrapak.com/fr-be/insights/tetra-pak-index>

6. DPG Media Privacy Gate. (z.d.).

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7. Heslenfeld, L. (2024, 10 juli). 1,7 miljoen Nederlanders gebruiken sportsupplementen | Multiscope. Multiscope.

<https://www.multiscope.nl/persbericht-en/1-7-miljoen-nederlanders-gebruiken-sportsupplementen/>

8. DPG Media Privacy Gate. (z.d.).

<https://www.dpgmediagroup.com/nl-NL/adverteren/grow/inzicht/branche-inzichten/nederlanders-gebruiken-steeds-vaker-ondersteunende-middelen-om-gezond-te-blijven/?referrer=https%3A%2F%2Fwww.google.com%2F>

### 3.1.2 Belgium

A similar trend is taking shape in Belgium, where health awareness is also influencing consumer behavior. According to Sciensano<sup>9</sup>, more than half of Belgians (52%) use dietary supplements. Usage is especially high among women (57%) and adults aged 40 and over, with 56% of those aged 40 to 64 and 57% of those over 65 reporting regular use. Among young adults (18–39), 50% include supplements as part of their routine. Usage rates are consistent across regions, with 50% of Flemish and 53% of Walloon consumers regularly taking supplements.

Interestingly, Belgians don't just rely on supplements during the colder months. While 45% report higher usage between December and March, the numbers remain consistent throughout the rest of the year (44%). In fact, 39% say they use dietary supplements year-round, suggesting that for many, supplementation is part of a sustained approach to personal well-being, not just a seasonal boost.

As in the Netherlands, motivations for taking supplements vary. In Belgium, the top reason is overall health support, cited by 54% of users<sup>10</sup>. Professional guidance also plays a key role: 41% say they were advised by a health expert, while 27% report using supplements to address a diagnosed nutrient deficiency. Other motivations include managing health problems (13%), following a restrictive diet (8%), or replenishing nutrients after blood donation (3%). Notably, women are more likely than men to follow professional advice when choosing supplements (45% vs. 37%).

When it comes to buying dietary supplements, most Belgians still prefer the pharmacy: 71% purchase their supplements there<sup>11</sup>. Online channels come in second, accounting for 18% of purchases, followed by parapharmacies at 11%. Smaller numbers shop at drugstores (9%), organic shops (4%), or supermarkets (3%).

### 3.1.3 Conclusion

Together, these insights paint a clear picture of the FSN opportunity in the Benelux. In both the Netherlands and Belgium, consumers are embracing proactive approaches to health and are increasingly open to functional products that deliver tangible benefits. With strong adoption across age groups, trust in supplements, and growing demand for convenience and quality, the region presents fertile ground for FSN brands looking to innovate and grow.



#### 9. Sciensano. (2023).

Gebruikers van voedingssupplementen. sciensano.be. Retrieved June 30, 2025, from <https://www.sciensano.be/nl/resultaten-van-de-nationale-voedselconsumptie-peiling-2022-2023/voedingssupplementen/gebruikers-van-voedingssupplementen>

#### 10. Sciensano. (2023c). Reasons for supplement intake and place of purchase.

sciensano.be. Retrieved June 30, 2025, from <https://www.sciensano.be/en/results-national-food-consumption-survey-2022-2023/dietary-supplements/reasons-supplement-intake-and-place-purchase?>

#### 11. Ibid.

Eurostat. (2024, 1 januari). Population structure and ageing. Geraadpleegd op 28 mei 2025, van [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Population\\_structure\\_and\\_ageing](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Population_structure_and_ageing)

# 4

## What drives the FSN boom?

### 4.1 Shifting age groups, shifting needs

Several overlapping trends help explain the rapid rise of FSN across markets like the Netherlands. Demographic change plays a key role: Europe's aging population is growing, and older consumers often have specific dietary needs. According to Eurostat<sup>12</sup>, on January 1, 2024, the EU population was estimated at 449.3 million people and more than one-fifth (21.6%) of it was aged 65 years and over. Moreover, the European Commission projects that this share will rise to around 30% by 2070<sup>13</sup>.

In the Netherlands, 20.8% of the population, approximately 3.76 million people, was aged 65 and over in January 2025<sup>14</sup>. In Belgium, the figure was similar, with 20.3% of the population (approximately 2.41 million people) in the same age group. This demographic shift continues to drive demand for nutritional products tailored to the evolving needs of older adults, increasing demand for nutritional support tailored to age-related health concerns.

At the same time, younger generations juggle busier routines, eat more frequently on the go, and gravitate toward convenient, ready-to-consume options that align with their lifestyle and support energy, focus, and immunity. The rise of post-pandemic health awareness also shapes purchasing behavior: people now place more value on personal well-being and long-term resilience. In the Netherlands, 35% of adults aged 25 to 35 say they worry about their health more than other age groups<sup>15</sup>. Belgium shows a comparable trend, with 54% of young people aged 16 to 25 reporting concerns about their health<sup>16</sup>.

Curious to dive deeper into the trends shaping today's FSN market? Read our article "[Growth in Food Supplement and Nutrition](#)"<sup>17</sup> to explore how evolving lifestyles and health priorities are redefining consumer demand, and what that means for producers.

12. Eurostat. (2024, January 1). Population structure and ageing. Retrieved on May 30 2025, from <https://ec.europa.eu/eurostat/statistics-explained/index.php>

13. IMMC. COM%282020%29241%20final.NLD.xhtml.4\_NL\_ACT\_part1\_v2.docx. (z.d.). <https://eur-lex.europa.eu/legal-content/NL/TXT/HTML/?uri=CELEX:52020DC0241#:~:text=Volgens%20de%20ramingen%20al%20in%20jaar>





## 4.2 The social media effect on what we eat

Social media also plays an important role in shaping FSN trends. Platforms like Instagram and TikTok have boosted interest in protein shakes, vitamin shots, and functional drinks. As influencers promote new products and ingredients, curiosity turns into demand. This trend stands out among younger consumers, who often trust online voices more than traditional ads. In fact, according to Deloitte, 72% of consumers are now open to buying directly through social media, and 60% want more ways to discover and shop for products on those platforms<sup>18</sup>.

14. Centraal Bureau voor de Statistiek. (z.d.). Ouderen. Centraal Bureau Voor de Statistiek.  
<https://www.cbs.nl/nl-nl/visualisaties/dash-board-bevolking/leeftijd/ouderen>

15. DPG Media Privacy Gate. (z.d.).  
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Deloitte.com. Geraadpleegd op 28 mei 2025, van <https://www2.deloitte.com/us/en/pages/chief-marketing-officer/articles/social-commerce-strategy.html>

## 4.3 Tailored to you

As expectations shift, today's consumers are looking for more than just healthy-sounding labels; they want clean ingredients, simple lists, and claims they can trust. Over half say they actively seek out products that support their wellbeing<sup>19</sup>. Increasingly, they're also looking for personalized options that match their body, goals, or lifestyle. According to FMCG Gurus, 63% of global consumers are interested in food and drink tailored to their individual needs<sup>20</sup>. This growing demand is pushing manufacturers to create FSN products that are not just functional, but also transparent and adaptable.

Together, these trends, an aging population, digital-first habits, and a growing focus on health, are powering the FSN boom. Brands that recognize these shifts and offer credible, science-based solutions will be the ones to stand out.

19. FMCG Gurus Custom Survey "Active Nutrition", Aug 2023 (Nigeria, South Africa, Denmark, France, Germany, Italy, Netherlands, Poland, Spain, UK)

20. Cowling, W. (2021, 2 juni). FMCG Gurus: Customized Nutrition in 2021. FMCG Gurus.  
<https://fmccgurus.com/blog/fmccg-gurus-customized-nutrition-in-2021/>

# 5

## The protein power shift



### 5.1 From niche to essential

Protein has transitioned from a niche nutrient primarily associated with bodybuilders to FSN's flagship ingredient and a foundational element in many consumers' daily routines. According to research by NIQ and GfK<sup>21</sup>, around 30% of Dutch consumers supplement meals with extra protein. Among women, that figure rises to 33%, and among young adults aged 18 to 34, it jumps to 43%. Motivations vary by age and gender: 48% cite muscle support and recovery as the main reasons, while 32% link protein intake to weight management.

Women are more likely than men to focus on weight control (37% vs. 24%) and report concern about not getting enough protein. For Dutch consumers aged 65 and over, bone health is also a key reason for adding protein to their diet.

So, while protein supports athletic performance, its relevance goes far beyond sports. A variety of groups benefit from getting enough protein<sup>22</sup>:

### **Children:**

Protein supports growth and development by forming the building blocks of cells, hormones, enzymes, and the immune system.

### **People with dietary restrictions or medical needs:**

For individuals with conditions such as diabetes, coeliac disease, or osteoporosis, protein helps maintain nutritional balance when intake is limited.

### **Those managing weight:**

Protein helps increase satiety by slowing digestion, which makes it a valuable ally in weight control.

### **Women in menopause:**

Hormonal changes increase the risk of muscle loss and osteoporosis. Higher protein intake, particularly when paired with resistance training—can help preserve strength and bone density.

21. NielsenIQ. (2025, 3 april). Vrouwen en jongeren leiden de proteinetrend - NIQ. NIQ. <https://nielseniq.com/global/nl/news-center/2025/vrouwen-en-jongeren-leiden-de-proteinetrend/>

22. Protein is for everyone. (n.d.). <https://www.tetrapak.com/en-nl/insights/cases/articles/protein-in-food-supplement>  
Les protéines conviennent à tous. (n.d.). <https://www.tetrapak.com/fr-be/insights/cases/articles/protein-in-food-supplement>

## 5.2 Protein in retail

Retail shelves across the Benelux are starting to reflect this growing interest in protein. In the Netherlands, 17% of all dairy products in supermarkets<sup>23</sup>. The increase is especially visible in drinkable dairy, a category that fits seamlessly into busy lifestyles. More than half of Dutch women say they consume more protein-fortified dairy drinks than they did a year ago, compared to 34% of men<sup>24</sup>.

Belgian brands are following a similar path, increasingly launching protein-enriched versions of their everyday favorites. Belgium's dairy protein market is projected to keep growing steadily, with an expected increase of 1.95% through 2027<sup>25</sup>.

Protein is moving beyond the supplement aisle and into mainstream, ready-to-consume formats. Convenience remains a key factor: shoppers want grab-and-go options that deliver functional benefits without compromising taste or ease.

Even at a premium price point, value perception remains strong. According to the Tetra Pak Index<sup>26</sup>, only 17% of global consumers say they would trade healthy choices for cost savings. This willingness to invest in nutritional quality applies across the Benelux, where health-conscious consumers examine labels, look for recognizable ingredients, and seek credible health claims. For them, it's not just about how much protein a product contains, but how well it fits their values, routines, and goals.



## 5.3 Standing out in a competitive space

As demand for protein-rich products grows, so does competition. Brands entering this space must work harder to differentiate themselves, both online and on the shelf. A study by Ipsos<sup>27</sup> found that 25% of European consumers rely on the internet as a primary source of information about food supplements, while 10% turn to product labels. In the Netherlands, this digital-first approach is even more pronounced: according to NIQ<sup>28</sup>, 28% of consumers use the internet to decide which protein products to buy, while 25% base their decision on what they see in-store.

Packaging plays a critical role in standing out. The Tetra Prisma® Aseptic 300 Edge<sup>29</sup> offers a format tailored to FSN needs. Its octagonal shape improves grip and user experience, while the resealable DreamCap™ 26 allows for easy consumption

on the go. The package is designed for shelf-stability, which supports long-lasting protein beverages without refrigeration, and it uses plant-based materials to reduce environmental impact. These features help producers deliver functional nutrition in a way that supports both sustainability and convenience, two big decision drivers for FSN shoppers.

Want to learn more about how packaging can drive success in the FSN category? Download the whitepaper “Designed for Success”<sup>30</sup> to explore key design strategies that elevate consumer experience, improve shelf appeal, and support functional performance.

23. Scheres, P. (2025, 1 januari). Van skyr tot proteïnepoeders: eiwitrijk eten wint aan populariteit. RTL.nl.

<https://www.rtl.nl/nieuws/economie/artikel/5460169/van-skyr-tot-proteine-poeders-eiwitrijk-eten-wint-aan-populariteit>

24. NielsenIQ. (2025, 3 april). Vrouwen en jongeren leiden de proteïnetrend - NIQ. NIQ. <https://nielseniq.com/global/nl/news-center/2025/vrouwen-en-jongeren-leiden-de-proteinetrend/>

25. Wresearch. (n.d.). Belgium Dairy Protein Market (2025-2031) | Trends, Outlook & Forecast. 6Wresearch. <https://www.6wresearch.com/industry-report/belgium-dairy-protein-market?>

26. Tetra Pak Index. (n.d.). <https://www.tetrapak.com/en-nl/insights/tetra-pak-index>  
Tetra Pak Index. (n.d.-b). <https://www.tetrapak.com/fr-be/insights/tetra-pak-index>

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<https://www.tetrapak.com/content/dam/tetrapak/media-box/global/en/packaging/package-type/tetra-prisma-aseptic/documents/designed-for-success-fsn-category.pdf>

# 6

## From idea to shelf: launching successful FSN products



## 6.1 Solving common formulation challenges

Bringing a functional food or supplement product to market presents more complexity than meets the eye. Taste, texture, nutritional stability, and shelf life need to align, while meeting clean-label expectations. Protein, vitamins, and other sensitive ingredients can interact with each other or degrade over time, affecting both quality and perception. Maintaining nutritional integrity, especially in ambient formats, also poses challenges: shelf-stable products need to be microbiologically safe without sacrificing flavor, texture, or label clarity. These requirements often involve trial and error in formulation, and tight coordination between R&D, processing, and packaging teams.





## 6.2 From formulation to execution: the building blocks of a FSN strategy

Overcoming these formulation challenges and developing a high-performing FSN product involves much more than just mixing ingredients. A clear, cross-functional plan from ideation to scale-up lays the groundwork for success. Tetra Pak offers a modular approach based on seven key building blocks<sup>31</sup>.

### 1. Finding the opportunity space

A successful FSN launch starts with identifying the right market gap. Product concepts should align with evolving consumer needs, whether that's immunity, focus, mobility, or digestive health. At this early stage, producers can collaborate with Tetra Pak to combine their own ideas with research support, trend data, and market intelligence. This helps define a relevant product proposition grounded in both consumer demand and commercial feasibility.

### 2. Selecting the right base and ingredients

Whether working with dairy, plant-based liquids, juices, nectars, soft drinks (JNSD), or powders, the base determines nutritional profile and processing needs. FSN producers increasingly work with high-performance ingredients such as whey protein, sunflower protein, postbiotics, or fiber blends, selected for both function and stability in liquid

applications. Tetra Pak supports this process by offering insights into ingredient behavior and processing compatibility, helping producers make informed formulation decisions.

### 3. Iterating and testing

Once a prototype is created, testing becomes essential. Tetra Pak's Product Development Centres (PDCs)<sup>32</sup> provide access to pilot-scale production environments where brands can test flavor, viscosity, and ingredient behavior before scaling up. This allows for faster iteration, reduced risk, and minimal disruption to existing production lines. UHT (ultra-high temperature) processing<sup>33</sup> may also be used to ensure microbiological safety without affecting flavor or texture, especially for low-acid functional drinks like protein-enriched oat beverages or plant-based recovery shakes.

### 4. Designing packaging that works

Packaging is a key differentiator in the FSN space. It must preserve product integrity, signal value, and support sustainability, all while fitting into consumers' on-the-go routines. Tetra Pak offers three carton formats that align particularly well with FSN needs:



**a. Tetra Prisma® Aseptic:** designed for functional drinks with an ergonomic shape and resealable DreamCap™. Made from over 85% renewable materials<sup>34</sup>.

**b. Tetra Brik® Aseptic:** Tetra Pak's most widely used carton package for long-life liquid foods. Available in volumes from 80 ml to 2000 ml and seven different formats, it supports ambient distribution and enables product differentiation through various shapes<sup>35</sup>.

## 5. Scaling production

Once the formulation and package are finalized, scaling must ensure quality and cost-efficiency. Tetra Pak supports this phase through customized production line assessments and upgrades, helping FSN producers scale operations based on product type, volume needs, and available infrastructure. With a focus on automation, precision dosing, and energy-efficient equipment, these solutions help producers maintain consistent product quality while optimizing operational costs and sustainability performance<sup>36</sup>.

## 6. Securing consistent supply

A stable supply chain minimizes downtime and risk. Ingredient availability, spare parts, and packaging logistics must all be coordinated. Tetra Pak's global footprint and logistics network help FSN producers manage supply with flexibility and transparency.

## 7. Accelerating time to market through co-packing

For newer brands or time-sensitive launches, co-packing is a valuable route to the market. By using an established partner for production and packaging, brands can reduce upfront investment, test new markets, and scale quickly. There are five key considerations when looking for a co-packer: product quality, production capability, price, infrastructure, and geographical location<sup>37</sup>.

31. From idea to shelf with much faster support. (n.d.).

<https://www.tetrapak.com/en-nl/insights/cas-es-articles/from-idea-to-shelf>  
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35. Tetra Brik® Aseptic. (n.d.).

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# 7

## Conclusion



Food Supplement and Nutrition has become a core part of daily health routines, driven by demographic shifts, growing health awareness, and demand for targeted benefits. Protein stands out as FSN's flagship ingredient, widely embraced across diverse consumer groups.

Still, turning a strong concept into a successful FSN product takes more than great intentions. Producers face a complex development journey, from formulation and nutrient stability to shelf life, testing, and packaging. To stand out, every element—taste, format, sustainability—needs to deliver both credibility and function.

That's where the right strategic partners make a difference. Tetra Pak helps FSN producers move from idea to shelf with speed, precision, and reduced risk. From ingredient insights and pilot testing to scalable production lines and smart packaging formats, Tetra Pak offers an end-to-end platform built for today's FSN landscape.

**Ready to explore your next FSN opportunity?**

[Contact us](#) to find out how we can help you get there.

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