World Nutraceuticals

Industry Study with Forecasts to 2010 & 2015

Study #2083 | July 2006 | $5500 | 486 pages
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Global demand to grow 5.8% yearly through 2010

World demand for nutraceutical ingredients will advance 5.8 percent annually to $15.5 billion in 2010, serving a $197 billion global nutritional product industry. China and India will emerge as the fastest expanding nutraceutical markets as strong economic growth allows them to upgrade and diversify food, beverage and drug production capabilities. The United States will remain the largest global consumer of nutraceutical ingredients due to the broad, increasing range of nutritional preparations and natural medicines produced domestically. However, because of outsourcing trends, the United States will relinquish its longstanding top position in the global production of nutraceutical ingredients to China within the next few years.

Herbal, non-herbal extracts to lead gains

Increasing acceptance by consumers and medical professionals will push world demand for herbal and non-herbal extracts up 6.5 percent annually to $1.85 billion in 2010. Conflicting clinical and scientific testing results about actual health benefits will inhibit faster gains in the overall product group. Garlic for improving cardiovascular functions, saw palmetto for benign prostatic hyperplasia, green tea for cancer prevention and weight loss, and black cohosh for post-menopausal symptoms will be among the herbs continuing to fare well in the worldwide marketplace. Glucosamine (in combination with chondroitin) will generate the strongest growth in demand among non-herbal extracts due to proven benefits in the treatment of moderate to severe arthritic conditions.

Nutrients & minerals, vitamins to also fare well

World demand for nutrients and minerals will reach $9.5 billion in 2010, up 6.3 percent annually from 2005. Soy proteins and isoflavones, psyllium fibers, omega-3 fatty acids, probiotics, lycopene, calcium and magnesium will see the fastest gains based on widely accepted health benefits and expanding applications in meal supplements and functional foods and beverages. Global demand for nutraceutical vitamin ingredients will increase 4.6 percent annually to nearly $4.2 billion in 2010. Natural vitamin E formulations derived from non-genetically modified plants will post the strongest gains due to their acceptability to the European Union and other countries (e.g., Brazil) that ban edible compounds produced through biotechnology. Natural formulations of beta carotene (vitamin A) will also fare well in the global marketplace based on efficacy advantages over synthetic ingredients, especially in multivitamin supplements and adult and pediatric nutritional supplements. Ongoing controversy about potentially toxic side effects will continue to moderate overall growth opportunities for nutraceutical vitamin ingredients as a whole.
Western Europe

Italy: Vitamins

A large contingent of national producers and consumers will keep Italy a major participant in the world market for bulk vitamins. In nutraceutical applications, the country’s demand for these compounds will increase 1.9 percent annually to $125 million in 2010. The commercialization of new upscale products into the domestic marketplace will promote growth. Trends toward the use of lower cost imported ingredients will moderate a faster rise in demand. Applications in food and beverage fortification will provide the best growth opportunities for bulk vitamin compounds in the Italian nutraceutical market. Over the past few years, Italy has seen a number of new product introductions in this area. For example, local food and beverage processor La Doria has introduced a line of vitamin-fortified fruit juices. Saiwa, a producer of baked goods and cereal products, recently debuted a vitamin- and mineral-enriched, low fat wheat and puffed rice biscuit. Another newer offering from a national firm is Perfetti Van Melle’s FRUIT-TELLA PLUS, a chewable soft caramel candy reported to provide 30 percent of the recommended daily allowance of calcium and vitamins in six pieces. Among the ingredients of this product are vitamins C, B2, B6 and B12, and niacin, panthothenic acid and calcium.

In addition to locally headquartered firms, a number of multinational food and drug makers produce vitamin-based nutraceutical products in Italy. For example, Mead Johnson Nutritional manufactures pediatric vitamins at a plant in Anagni. Another multinational giant, Nestle, makes fortified milk and related products at a facility in Milano.

Serving as a leading source for compounds employed in the production of dietary supplements, fortified foods and beverages, and nutritional preparations throughout Eastern and Western Europe, Italy will sustain a wide trade surplus in bulk vitamins for nutraceutical applications.

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Sample Text, Table & Chart

**Table V-14**

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<td>408</td>
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<td>249</td>
<td>294</td>
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---

**Chart VIII-1**

**Nutraceutical Market Share by Company, 2005**

($11.7 billion)*

*Based on sales of bulk ingredients only.
**COMPANY PROFILES**

Bio-Botanica Incorporated  
75 Commerce Drive  
Hauppauge, NY 11788  
631-231-5522  
http://www.bio-botanica.com

Annual Sales: $15 million (company would not verify, 6/06)  
Employment: 115 (company would not verify, 6/06)

Key Products: Botanical extracts, Bio-Cheletion cold extraction process

Bio-Botanica Incorporated (BBI) is a privately held manufacturer and supplier of 100-percent pure botanical extracts, and botanical and herbal ingredients. The Company's products are marketed primarily to the cosmetics, food and pharmaceuticals industries. BBI is also active in the private label custom manufacture of liquid sports, dietary and nutritional supplements.

BBI’s products include HOLISTICALLY BALANCED botanical extracts, which are produced using the Company’s BIO-CHELATION cold extraction process to achieve a potency level equal to that of plants in their natural state. The Company produces more than 300 extracts, including artichoke, echinacea, ginkgo biloba, ginseng, garlic, goldenseal, aloe vera gel, chamomile, marigold, kelp, bladderwrack, milk thistle, licorice root, ginger root, valerian root and rose hips. These botanicals are available in tincture, fluid extract, solid extract and powdered extract forms. BBI also produces SABALTONE standardized saw palmetto berry extract, which is supplied in granular, oil-containing and powdered grades for functional beverage and other nutraceutical end uses. BBI grows many of its own saw palmetto berries on farms in Florida.

---

**TABLE V-15**

ITALY - VITAMIN DEMAND BY PRODUCT GROUP  
(million dollars)

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<td>Nutraceutical Demand</td>
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<td>350</td>
<td>408</td>
<td>475</td>
<td>550</td>
</tr>
<tr>
<td>% vitamins</td>
<td>33.7</td>
<td>30.3</td>
<td>27.9</td>
<td>26.3</td>
<td>24.5</td>
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<tr>
<td>Vitamin Demand</td>
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<td>106.0</td>
<td>114.0</td>
<td>125.0</td>
<td>135.0</td>
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<td>Vitamin E</td>
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<td>30.1</td>
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<td>37.3</td>
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<td>Vitamin C</td>
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<td>Vitamin A</td>
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<td>22.9</td>
<td>26.4</td>
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**SAMPLE PROFILE**

“Natural medicines will generate favorable growth in Italy as constraints on health care services encourage consumers to engage in greater preventive medicine and self-treatment activities. This trend is prompting a number of the country's over-the-counter drug makers, including Gruppo Lepetit, Rottapharm and Zambeletti, to expand lines of natural and alternative remedies. The increasing production and consumption of these end-use products will boost Italy’s demand for herbal and non-herbal extracts ...”

--Section V, pg. 204
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Food Additives
This study analyzes the US food additive industry. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by product (e.g., flavors and flavor enhancers, texturizers and fat replacers, emulsifiers, preservatives, nutraceuticals, colorants, enzymes, alternative sweeteners, acidulants); and application (e.g., processed foods, dairy products, bakery products, candy). The report also considers market environment factors, evaluates company market share and profiles industry players.

#2305 ................... 02/2008 .................. $4500

World Enzymes
World demand for enzymes will grow 7.6% annually through 2011. Gains will be driven by continued robust growth in pharmaceutical enzyme demand, double-digit increases in demand for biocatalysts for drug and fine chemical production, and the rapid expansion in bioethanol production from grains. This study analyzes the $4.1 billion world enzyme industry, with forecasts for 2011 and 2016 by product, market, world region and for 15 countries. It also evaluates market share and profiles major players.

#2229 ................... 09/2007 .................. $5400

Alternative Sweeteners
US demand for alternative sweeteners will grow 4% annually through 2010. Products such as saccharin, erythritol and xylitol gain market share over more established products like aspartame and sorbitol. Newer types such as stevia and agave nectar will grow the fastest, hoping to appeal to consumers wary of high intensity sweeteners. This study analyzes the $935 million US alternative sweetener industry for 2010 and 2015 by product and market. It also details company market share and profiles major players.

#2138 ................... 01/2007 .................. $4300

Cosmeceuticals
US cosmeceuticals demand will grow 8.5% annually, propelled by a stream of new products offering age-defying and other appearance-enhancing benefits. Skin care products will remain dominant while professional products will grow the fastest. BOTOX and hyaluronic acid will lead gains among cosmeceutical chemicals. This study analyzes the $5.4 billion US cosmeceutical industry for 2010 and 2015 by product and chemical. It also evaluates company market share and profiles leading players.

#2114 ................... 10/2006 .................. $4400

Cosmetic & Toiletry Chemicals
US cosmetic and toiletry chemical demand will grow 5.4% yearly through 2010. An aging and increasingly ethnically diverse population along with consumer desires to offset the effects of aging and preferences for “natural” products will drive demand. Active and plant-derived ingredients will benefit the most from these factors. This study analyzes the $5.9 billion US cosmetic and toiletry chemical industry to 2010 and 2015 by product, function and market. It also profiles major players and evaluates market share.

#2058 ................... 05/2006 .................. $4300

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