INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

World Nutraceutical Ingredients

Industry Study with Forecasts for **2013 & 2018**

Study #2565 | November 2009 | $5800 | 487 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

WORLD SUPPLY & DEMAND

NORTH AMERICA

WESTERN EUROPE

ASIA/PACIFIC

OTHER REGIONS

INDUSTRY STRUCTURE

COMPANY PROFILES

List of Tables/Charts

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

WORLD SUPPLY & DEMAND

(continued on following page)

World Nutraceutical Ingredients

Industry Study with Forecasts for ***2013 & 2018***

Freedonia®

List of Tables/Charts

(continued from previous page)

NORTH AMERICA

WESTERN EUROPE

ASIA/PACIFIC

OTHER REGIONS

INDUSTRY STRUCTURE

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World Nutraceutical Ingredients

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The United States will continue to be the largest global consumer nutraceutical ingredients through 2013 due to the broad, increasing range of such products manufactured domestically.

Global demand to expand 6.2% yearly through 2013

World demand for nutraceutical ingredients will expand 6.2 percent annually to $21.8 billion in 2013, serving a $236 billion global nutritional product industry. By country, the United States will continue to be the largest global consumer of nutraceutical ingredients through 2013 due to the broad, increasing range of functional foods and beverages, nutritional preparations and natural medicines produced domestically. China will remain the largest worldwide producer based on its extensive fine chemicals industry and aggressive pursuit of export opportunities. China will also pass the United States as the leading consumer of nutraceutical ingredients after 2013.

World Nutraceutical Ingredient Demand, 2008
($16 billion)

Nutrients and minerals to dominate market

World demand for nutrients and minerals will reach $12.6 billion in 2013, up 6.4 percent annually from 2008. Soy proteins and isoflavones, psyllium and resistant maltodextrin fibers, omega-3 fatty acids, probiotics, carotenoids, calcium and magnesium will see the fastest gains based on widely supported and accepted health benefits and expanding applications in adult nutritionals and functional foods and beverages.

A, E and D to be fastest growing vitamins

Global demand for nutraceutical vitamin ingredients will increase 5.9 percent annually to over $7 billion in 2013. Natural vitamin E formulations derived from non-genetically modified plants will post the strongest gains due to health and nutritional advantages over synthetic formulations as well as their acceptability to the European Union and other countries (e.g., Brazil) that limit the production of edible compounds 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 nutritionals. Among other vitamins, vitamin D will see the fastest growth in demand due to increasing clinical evidence of cancer, swine flu and other preventive medicine benefits.

Ginkgo biloba, glucosamine to pace extracts

Widespread popularity among consumers and increasing acceptance by medical professionals will boost global demand for herbal and non-herbal extracts 6.2 percent annually to $2.2 billion in 2013. Ginkgo biloba for improving cognitive 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. Glucosamine (in combination with chondroitin) will generate the strongest growth in demand among non-herbal extracts due to its alleged treatment of arthritis.

Sample Text, Table & Chart

TABLE VI-9

INDIA - NUTRACEUTICAL INGREDIENTS SUPPLY & DEMAND BY PRODUCT GROUP (million dollars)

Item	1998	2003	2008	2013	2018
Nutritional Product Shipments (bil $)					
$ ingredients/000$ shipments					
Nutraceutical Ingredients Demand					
Nutrients & Minerals					
Vitamins					
Herbal & Non-Herbal Extracts					
net exports					
Nutraceutical Ingredients Shipments					
Nutrients & Minerals					
Vitamins					
Herbal & Non-Herbal Extracts					

SAMPLE TABLE

India: Nutraceutical Ingredients Supply & Demand

Based on the activities of its large, expanding food and ceutical industries, India will provide strong growth opportu nutraceutical ingredients. The country's demand for these co will increase billion in 2013. In its developin derdeveloped prima care system, verage and pharma industries tha manufacturers. Le and beverage try include Britann tries (baked g estle India (milk, nu functional drin onfectionery product Soya Industries (soybean-based foods) and Tata Tea (conven specialty teas). In addition to Nestle, Kellogg and Kraft Foo among the leading multinational food processing concerns that operate production sites in India.

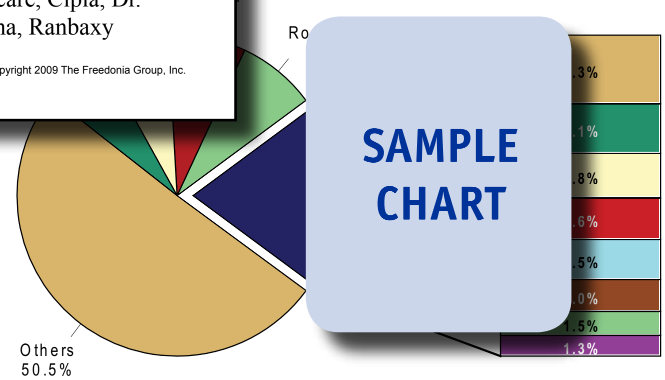
SAMPLE TEXT

Producers of nutraceutical-based dietary supplements and therapies in India include Amrutanjan Limited, Cadila Healthcare, Cipla, Dr. Reddy's Laboratories, Emami, FDC, Ipca Laboratories, Kopran, Lupin, Morepen Laboratories, Natco Pharma, Ranbaxy Laboratories, Sun Pharmaceutical Industries and Unichem Laboratories. Several multinational drug makers, including Eisai Pharmaceuticals, GlaxoSmithKline, Merck KGaA, Novartis and Wyeth (Pfizer), also operate production facilities in India. Eisai Pharmaceuticals, GlaxoSmithKline, Merck KGaA, Pfizer and Novartis make vitamin and mineral supplements, while Wyeth manufactures adult and pediatric nutritionals.

On the supply side, India will maintain a modest trade surplus in nutraceutical ingredients as most of the country's large pharmaceutical companies operate divisions that produce bulk medicinal and nutritional compounds. Included in this group are Cadila Healthcare, Cipla, Dr. Reddy's Laboratories, Ipca Laboratories, Natco Pharma, Ranbaxy

CHART VIII-1

EUTICAL INGREDIENTS INDUSTRY HARE BY COMPANY, 2008 ($16.1 billion)



World Nutraceutical Ingredients

Industry Study with Forecasts for ***2013 & 2018***

Sample Profile, Table & Forecast

TABLE VI-12

INDIA - HERBAL & NON-HERBAL EXTRACTS DEMAND IN NUTRACEUTICALS (million dollars)

Item	1998	2003	2008	2013	2018
Nutraceutical Ingredients Demand	30[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0.0
% herbal & non-herbal extracts	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].0
Herb & Non-Herbal Extracts Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].0
Herbal Extracts:	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].0
Ginkgo Biloba	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].0
Ginseng	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].8
Garlic	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].0
St. John's Wort	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].7
Echinacea	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].4
Saw Palmetto	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].0
Other Herbal Extracts	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].1
Non-Herbal Extracts	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].0
net exports	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].0
Herb & Non-Herbal Extracts Shpts	54[illegible]	[illegible]	[illegible]	[illegible]	[illegible]70.0

SAMPLE TABLE

COMPANY PROFILES

Daiichi Sankyo Company Limited
5-1 Nihonbashi-honcho 3-chome
Chuo-ku, Tokyo 103
Japan
813-6225[illegible]
http://ww[illegible]

Sales: $[illegible]
Geograp[illegible] [illegible]apan 63%, North
America[illegible] [illegible]gions 3%
Employ[illegible]

Key Proc[illegible] [illegible] foods and beverages

SAMPLE PROFILE

Daiichi Sankyo is a holding company involved in the production and sale of pharmaceuticals, veterinary products and chemicals. The Company operates in four segments: OTC Drugs, Prescription Drugs, Prescription Drugs Overseas and Others.

Daiichi Sankyo participates in the world nutraceuticals industry through the OTC Drugs segment, which generated sales of $470 million in FY 2009. Among other operations, the segment's Daiichi Sankyo Healthcare Company Limited subsidiary (Japan) manufactures and markets a range of dietary supplements and functional foods and beverages for the Japanese market. Representative products include REGAIN 24 nutritional beverages, which contain such nutrients as vitamins B1, B2 and B6; soybean oil and fish oil capsules, which contain eicosapentaenoic acid and docosahexaenoic acid; calcium and magnesium supplements; and SISTINE C, a supplement containing vitamins B6 and C. Nutraceuticals and other products are manufactured at plants in Akita, Onahama, Hiratsuka, Odawara, Shizuoka, Takatsuki and Osaka, Japan..

166

"Imbalances and deficiencies in the national medical delivery system will keep a large percentage of India's population dependent on natural and alternative medicines. In addition, the increasing worldwide popularity of the country's traditional ayurvedic therapies will boost export opportunities for formulations based on compounds such as abana, arjuna, bala and guggul. Spurred by trends in the domestic production of end-use products, demand for herbal and non-herbal extracts in India is forecast to advance 7.5 percent annually to $128 million in 2013."
--Section VI, pg. 328-9

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Other Studies

Soy Chemicals

US soy chemical demand will grow 7.8% annually through 2013, driven by the continued penetration of biodiesel, and by the adoption of alternatives to traditional, petrochemical-based materials in manufacturing. Soy oil derivatives such as methyl soyate, polyols, soy-based foamed plastics, waxes and fatty acids hold particularly good prospects. This study analyzes the $1.9 billion US soy chemical industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.

#2538 .... 09/2009.................... $4700

Alternative Sweeteners

US demand for alternative sweeteners is projected to grow 3.4% annually through 2013, as food processors and consumers seek healthier food options with fewer calories or less high fructose corn syrup. Sucralose, acesulfame potassium (ace-K), erythritol and stevia extract rebiana (reb-A) will see above average gains. This study analyzes the $1.1 billion US alternative sweetener industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.

#2497 .... 05/2009.................... $4600

In Vitro Diagnostics

US demand for *in vitro* diagnostic (IVD) products is forecast to increase 5.4 percent annually through 2013. Clinical chemistry and immunoassay will remain the top two IVD methodologies. Nucleic acid testing products will generate the fastest demand gains while endocrine condition testing remains the largest application. This study analyzes the $17.6 billion US IVD industry, with forecasts for 2013 and 2018 by product, application and market. It also evaluates company market share and profiles industry players.

#2455 .... 03/2009.................... $4800

Cosmeceuticals

Demand for cosmeceuticals in the US will increase 7.4% annually through 2012, driven by an aging population seeking to maintain the appearance of youth. Antioxidants will remain the largest chemical category while botanicals and enzymes stay among the best opportunities. Injectables and skin care products will register the fastest growth. This study analyzes the $5.8 billion US cosmeceutical industry, with forecasts for 2012 and 2017 by product and chemical. It also evaluates market share and profiles major players.

#2413 .... 10/2008.................... $4700

Cosmetic & Toiletry Chemicals

US demand for cosmetic and toiletry chemicals will rise 5.8% yearly through 2012, aided in part by consumer preferences for organic and natural products. Chemicals used as active ingredients will benefit from continued gains in cosmeceutical skin care products and high value nanoscale additives. This study analyzes the $6.6 billion US cosmetic and toiletry chemicals industry, with forecasts for 2012 and 2017 by product, function and market. It also evaluates market share and profiles industry players.

#2369 .... 07/2008.................... $4700

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