World Nutraceutical Ingredients

Industry Study with Forecasts for 2017 & 2022

Study #3079 | November 2013 | $6300 | 610 pages
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The best growth prospects exist in substances with clinically supported health benefits and broad applications in foods, beverages, dietary supplements, and adult and pediatric nutritional preparations.

World demand to rise 6.4% annually through 2017

World demand for nutraceutical ingredients is forecast to increase 6.4 percent annually to $28.8 billion in 2017. The best growth prospects will exist in substances with clinically supported health benefits and broad applications in foods, beverages, dietary supplements, and adult and pediatric nutritional preparations. Included in this group are soy proteins; oat bran, psyllium, and soy fibers; cranberry and garlic extracts; calcium and zinc minerals; folic acid; and vitamins A and D.

Developing world markets to grow the fastest

Brazil, China, India, Mexico, and Turkey will be among the fastest growing consumers and producers of nutraceutical ingredients worldwide. Increasing economic prosperity will enable these countries to expand and diversify their food and beverage processing, and pharmaceutical industries. In 2017, China alone will absorb almost 14 percent of the value of global nutraceutical ingredient demand and will account for nearly 19 percent of the value of related world shipments. The United States will remain the world leader, making up 20 percent of global demand and 21 percent of shipments.

Because of maturing markets and recurring safety controversies involving various compounds, the supply of and demand for nutraceutical ingredients in the United States, Western Europe, and other developed economies will increase more slowly than will developing world markets. Nonetheless, food, beverage, and pharmaceutical companies in these economies will continue to pursue opportunities in conventional and specialty nutritional products and natural medicines. As a result, they will remain major customers for nutraceutical ingredients.

Nutrients to remain top selling product group

Nutrients, including proteins, fibers, and various specialized functional additives, will remain the top selling group of nutraceutical ingredients worldwide. Fibers will post the fastest demand gains as food and beverage makers throughout the world introduce new high value-added nutritional preparations. Soy and whey proteins will also fare well in the global marketplace. Demand for these ingredients will gain upward momentum from increasing clinical evidence of health benefits and expanding applications in specialty foods and beverages. By contrast, the continued lack of clinically supported health benefits will slow growth in the global market for probiotic additives. This slowdown will be especially sharp in the European Union countries where regulators recently banned the use of unsubstantiated health claims in product advertising.
India: Nutraceutical Ingredient Supply & Demand

Total demand for nutraceutical ingredients in India will increase 8.5 percent annually to $1.6 billion in 2017. Gains will reflect rising income levels, expanding urban areas and increased product availability, trends toward healthier lifestyles in India will turn increasingly to nutraceuticals and dietary supplements to compensate for dietary deficiencies and imbalances. Less favorably, only about one-third of the population will enjoy regular access to these products as widespread poverty and limited distribution systems of major economic centers will preclude availability to residents living in rural areas.

Existing and potential customers for nutraceutical ingredients in India include upwards of 25,000 food and beverage processing firms and 20,000 pharmaceutical producers. Agro Foods, Amul, Britannia Industries, ITC, Parle Products, and Perfetti Van Melle are among the top domestic food and beverage processors based on total revenues, with Cadbury, Kellogg, Nestlé, and PepsiCo among the largest multinational concerns with operations in the country. The most recent multinational entrant into the Indian marketplace is Groupe Danone. In July 2012, that company acquired the India-based nutraceutical businesses of Wockhardt Group and its Carol Info Services subsidiary for $355 million. The transaction included the FAREX, DEXOLAC, and NUSOBEE lines of infant formulas; the PROتينEX group of adult protein supplements; and the FAREX brand of weaning cereal.

Based on 2012 revenues, the largest locally headquartered drug makers in India consisted of Cipla, Dr. Reddy’s Laboratories, Ranbaxy Laboratories (Daichi Sankyo), Sun Pharmaceutical Industries, Cadila Healthcare, and Ipca Laboratories. Other large pharmaceutical manufacturers operating in the country include Ajanta Pharma, Albert David, Dabur India, Elder Pharmaceuticals, Glenmark Pharmaceuticals, and Others.

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### Sample Profile, Table & Forecast

#### COMPANY PROFILES

**Hospira Incorporated**  
275 North Field Drive  
Lake Forest, IL  60045  
224-212-2000  
http://www.hospira.com

Sales: $4.1 billion (2012)  
Employment: 16,000 (2012)

Key Products: parenteral nutritional solutions, electrolytes, vitamins, and trace element additives

Hospira develops, manufactures, and markets specialty injectable pharmaceuticals and medication delivery systems that deliver drugs and intravenous (IV) fluids, and provides contract manufacturing services to pharmaceutical and biotechnology companies for the formulation, development, filling, and finishing of injectable pharmaceuticals. The Company operates through three segments: Americas; Europe, Middle East, and Africa (EMEA); and Asia Pacific.

Hospira competes in the world nutraceuticals industry via all three segments, which manufacture and sell products for use in hospitals, long term care facilities, clinics, and home health care applications. These segments supply products and services through three groups, of which the Other Pharmaceuticals product group includes the production and marketing of such nutraceuticals as parenteral nutritional solutions, electrolytes, vitamins, and trace element additives. Representative products include AMINOSYN and AMINOSYN II specialty amino acid solutions; LIPOSYN III soybean oil emulsion; FIRSTCHOICE micronutrients, which include electrolytes, vitamins, and trace element additives; AQUASOL A vitamin A supplements; AQUASOL E vitamin E supplements; and MVI ADULT, MVI PEDIATRIC and MVI-12 553

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**SAMPLE TABLE**

This Freedonia study, *World Nutraceutical Ingredients*, offers historical data (2002, 2007, 2012) plus forecasts for 2017 and 2022 for supply and demand, as well as demand by product group in six regions and 17 major countries. The study also details key market environment factors, evaluates company market share and profiles 38 competitors in the world nutraceutical ingredients industry.

**STUDY COVERAGE**

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The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

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Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company’s specific needs, companies harness Freedonia’s research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia’s team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.