World Nutraceutical Ingredients

Industry Study with Forecasts for **2017 & 2022**

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World Nutraceutical Ingredients

Industry Study with Forecasts for *2017 & 2022*

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ASIA/PACIFIC

OTHER REGIONS

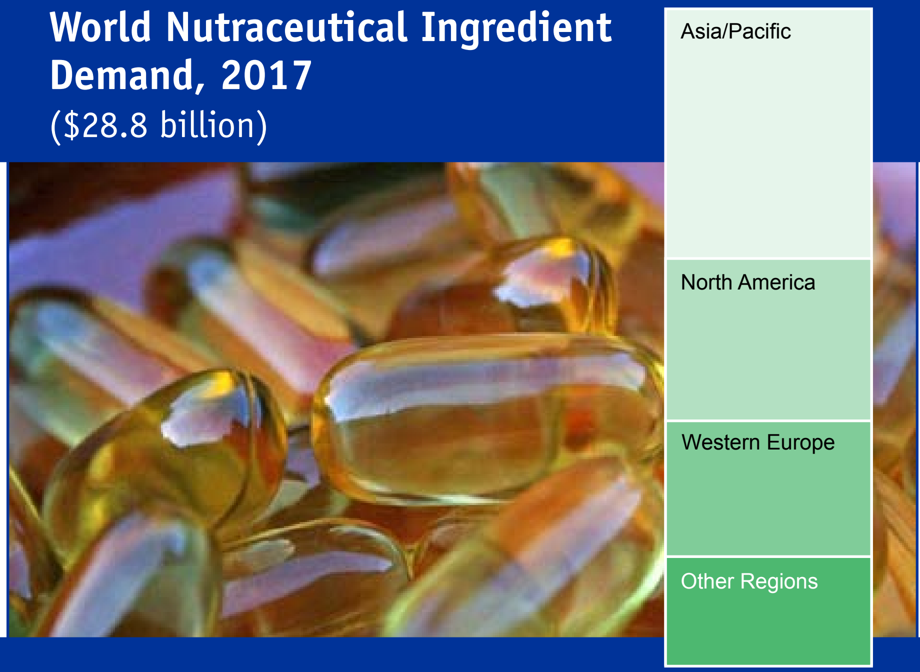
INDUSTRY STRUCTURE

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.

World Nutraceutical Ingredient Demand, 2017
($28.8 billion)



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.

World Nutraceutical Ingredients

Industry Study with Forecasts for ***2017 & 2022***

Sample Text, Table & Chart

TABLE VI-15

INDIA: MINERAL & VITAMIN INGREDIENT DEMAND BY PRODUCT GROUP (million dollars)

Item	2002	2007	2012	2017	2022
Nutraceutical Product Shipments					
$ ingredients/000$ products					
Mineral & Vitamin Ingredient Demand					
Minerals:					
Electrolytes					
Essential Minerals					
Trace Minerals					
Vitamins:					
Vitamin C					
Vitamin A					
B-Group Vitamins					
Vitamin E					
Other Vitamin Ingredients	7.9	14.0	22.6	34.2	50.5

SAMPLE TABLE

MARKETS

India: Nutraceutical Ingredient Supply & Demand

Total demand for nutraceutical ingredients in India will ... percent annually to $... will reflect ri... levels, expanding url... oduct availa... trends toward health... India will tu... ingly to nutraceutica... and wellne... compensate for dieta... ces. Less fa... only about one-third ... regular acc... products as widesprea... ribution syste... of major economic centers will preclude availability to reside... rural areas.

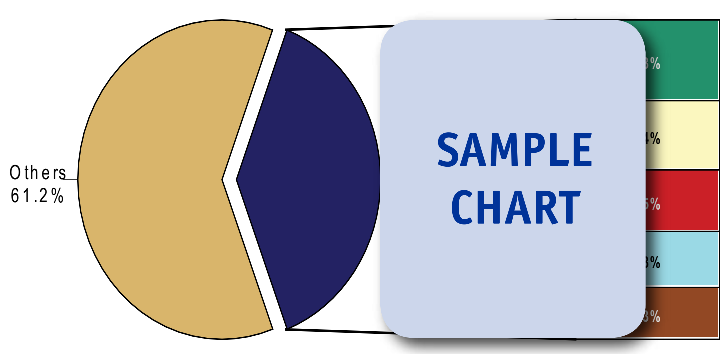
SAMPLE TEXT

Existing and potential customers for nutraceutical ingre... India include upwards of 25,000 food and beverage processing firms and 20,000 pharmaceutical producers. Agro Foods, Amul, Brittania 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 PROTINEX group of adult protein supplements; and the FAREX brand of weaning cereal; .

Based on 2012 revenues, the largest locally headquart... makers in India consisted of Cipla, Dr. Reddy's Laboratori... Laboratories (Daiichi Sankyo), Sun Pharmaceutical Indust... Cadila Healthcare, and Ipca Laboratories. Other large phar... manufacturers operating in the country include Ajanta Pha... David, Dabur India, Elder Pharmaceuticals, Glenmark Pha...

CHART VIII-1

WORLD NUTRACEUTICAL INGREDIENT MARKET SHARE ($21.2 billion, 2012)



World Nutraceutical Ingredients

Industry Study with Forecasts for ***2017 & 2022***

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Sample Profile, Table & Forecast

TABLE VI-13

INDIA: NUTRIENT INGREDIENT DEMAND BY PRODUCT GROUP (million dollars)

Item	2002	2007	2012	2017	2022
Nutraceutical Product Shipments					
$ ingredients/000$ products					
Nutrient Ingredient Demand					
Protein Additives					
Functional Nutrient Additives:					
Probiotics					
Other					
Fiber Additives					

SAMPLE TABLE

COMPANY PROFILES

Hospira Incorporated
275 North Field Drive
Lake Forest, IL 60045
224-212-
http://w

Sales: $
Employ

Key Pro ctrolytes, vitamins,
and trac

SAMPLE PROFILE

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

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STUDY COVERAGE

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.

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Other Studies

World Enzymes

This study analyzes the world enzyme industry. It presents historical demand data for 2002, 2007 and 2012, and forecasts for 2017 and 2022 by product (e.g., carbohydrases, proteases, polymerases and nucleases, lipases), market (e.g., food and beverage, cleaning products, biofuel production, animal feed, pharmaceutical, research and biotechnology), world region and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3104 ....January 2014 .... $6300

Flavors & Fragrances

The US market for flavors and fragrances will grow 4.6 percent yearly to $7.1 billion in 2017. Flavor and fragrance blends will remain the largest categories based on rising demand and regular reformulation of goods that contain flavors and fragrances. Essential oils and natural extracts will be the fastest growing segment as more consumers favor natural ingredients. This study analyzes the $5.7 billion US flavor and fragrance industry, with forecasts for 2017 and 2022 by market and product. The study also evaluates company market share and profiles industry players.

#3044 .... August 2013 .... $5100

World Aquaculture: Feed, Equipment & Chemicals

After several decades of rapid expansion, world demand for aquaculture supplies and equipment is expected to grow 7.4 percent per year to $63.6 billion in 2017 at the farm gate level. The Asia/Pacific region will remain the dominant market, with the key China segment outpaced by other Asian countries. This study analyzes the $44.6 billion world aquaculture supplies and equipment industry, with forecasts for 2017 and 2022 by fish type, product, market, world region and for 17 countries. The study also evaluates company market share and profiles industry participants.

#2999 .... March 2013................... $6100

Animal Health Products

US demand for animal health products will rise 3.5 percent yearly to $12.7 billion in 2016. Vaccines and diagnostics will be the fastest growing types, while nutritional chemicals and parasiticides will continue to account for the largest share of demand. Livestock and poultry will remain the dominant animal class, while the pet segment will lead gains. This study analyzes the $10.7 billion US animal health product industry, with forecasts for 2016 and 2021 by product, market, and animal class. The study also evaluates company market share and profiles industry players.

#2990 .... February 2013................. $5100

Pet Health: Products & Services

US consumer spending on pet health products and services will reach $30.9 billion in 2016, driven by the increasing treatment of companion animals as family members. Pet insurance will continue to see the fastest gains in the dominant service segment. Pharmaceuticals and parasiticides will remain the largest product segments. This study analyzes the $24.6 billion US pet health industry, with forecasts for 2016 and 2021 by service, product, condition type and animal. The study also evaluates company market share and profiles industry players.

#2913 .... July 2012.................... $5100

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