

Global Nutraceutical Excipients Market Outlook to 2027

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Abstracts

Nutraceutical excipients are inactive ingredients used during the production of nutraceuticals. Some of these ingredients include film coating, thickeners, preservatives, lubricants, binders, and colors, among others. The composition of nutraceutical excipients in the final products ranges from 10-30%. According to BlueQuark Research and Consulting, the market for nutraceutical excipients is expected to witness a significant growth rate during the forecast period. The market for nutraceutical excipients is driven by the growing demand for nutraceuticals among the higher and middle-class populations coupled with the growing R&D to develop nutraceuticals based on natural extracts. The market growth is restrained by the difficulty involved in formulating stable and high-quality nutraceutical products by maintaining low levels of excipients.

Nutraceuticals are products that are derived from food sources with extra health benefits along with basic nutritional value found in foods. In recent years, nutraceuticals have attracted significant interest from consumers due to their potential nutritional, safety, and therapeutic effects. Nutraceuticals can be used to improve health, postpone the aging process, prevent chronic diseases, or just support the functions and integrity of the body. The global nutraceutical excipient market has witnessed maximum growth in the last decade. In 2019, the global nutraceuticals market valued around USD 260 billion, and the demand were anticipated to grow at a significant rate in the coming years. The factors driving the growth of the nutraceuticals market include an increase in demand for preventive healthcare and a rise in medical treatment globally. Nutraceuticals are becoming a part of the consumer's daily diet. This change is majorly due to the increasing prevalence of lifestyle diseases and people taking preventive healthcare measures.

Various regions across the globe are realizing the potential of the nutraceutical industry is investing in developing the facilities to serve the respective populations. For instance, the nutraceuticals market in India is expected to grow from USD 4 billion in 2017 to USD 18 billion by 2025, owing to the rising demand for dietary supplements from the upper and middle-class population. The presence of a large coastline spanning over 7,500 kms, with more than 12 major and 200 minor ports, make India an ideal manufacturing hub for the global value chain. The country is a home to the largest number of US FDA approved plants located outside the US. In terms of geography, Asia-Pacific is the fastest-growing market for nutraceuticals globally, with countries such as Japan, China, and India accounting for a major share. These regions have a presence of a large population coupled with rising disposable incomes expected to drive the demand of the nutraceutical. Currently, the countries that account for major consumption of nutraceuticals include the US, Japan, and Europe, among others.

The R&D in the field of nutraceuticals is directed towards the following fields:

To test the safety, potency, and purity of products.

To develop more effective and means of producing ingredients for use in products.

To develop testing methods for ensuring the consistency of the dosage of ingredients included in the company's products.

Develop the new products either by combining the existing ingredients used in nutritional supplements or identifying new ingredients that can be used in nutritional supplements.

According to the aforementioned factors, the market for nutraceutical excipients is expected to continue to be driven by the increasing demand for nutraceuticals during the forecast period.

The development of nanostructured lipid carriers (NLCs) in recent years has gained increasing interest. Along with nano-based excipients, plant-based excipients are gaining popularity due to their natural origin. These excipients are relatively more stable and welcome less regulative problems compared to their artificial counterparts.

The global nutraceutical excipients market is segmented based on form, function, and end product. The form segment is further segmented as Dry and Liquid. The function segment is further segmented as Coating Agent, Fillers & Diluents, Binders, Lubricants, Flavoring Agent, and others. The end product segment is further segmented as Proteins & Amino Acid, Prebiotics, Probiotics, Vitamins, Minerals, and others. Among different end products, proteins and amino acids dominated the market with the highest share. Probiotics are expected to exhibit high growth in the coming years. Probiotics are live yeasts and bacteria that are good for the human body, especially for the digestive system. Probiotics are often called good bacteria. Probiotics are increasingly being researched for clinical benefits associated with the gut microbiome. These are mainly formulated as powders in hard-shell capsules. However, they are being launched in the form of sachets, stick packs, and also in tablet forms.

In probiotics, excipients are needed for dosage form stability. Some of the properties of excipients that are used for probiotics are as following:

Inert nature of excipient that does not react with the probiotics.

Presence of low moisture to avoid the growth of microorganisms and instability.

Excellent compressibility and cushioning of probiotic granules, relieving the heat generated from using high compression force to form tablets.

On a global level, about 45% of the new product launches for probiotic supplements are in capsule form. The level of the excipient used vary with the forms. For instance, the amount of excipient used for stick packs is high since it takes a lot to fill the pack size. This could be a deciding factor for the overall cost of production of probiotics. In some cases, an irregular amount of excipient could also turn out to be a technical challenge and bring down the shelf-life of probiotics. Some of the desired benefits from an excipient used for probiotics include hard tablets with low friability, less wear on tableting equipment, improve the existing formulation, and oil to powder, among others.

Based on geography, the global nutraceutical excipients market is segmented into North America, Europe, Asia-Pacific, South America, and Middle East & Africa. The North American region is expected to continue to dominate the market followed by Europe. However, Asia-Pacific is anticipated to exhibit the fastest growth during the forecast

period owing to the presence of a large population in the region along with the rising disposable incomes of the middle-class population in countries including China, India, and ASEAN countries.

In the United States, nutraceuticals are mostly unregulated, and they come under the same category as dietary supplements and food additives by FDA under the authority of the Federal Food, Drug, and Cosmetic Act. The demand for nutraceuticals is increasing in the country amid the COVID-19 pandemic, as people are focusing on increasing and maintaining the immunity of the body. The USFDA regulates dietary supplements in the United States under its own set of unique regulations. According to the Dietary Supplement Health and Education Act of 1994 (DSHEA), the manufacturer of a dietary supplement or dietary ingredient is responsible for ensuring that the product is safe before it is marketed. In 2007, with the introduction of the federal Good Manufacturing Practice (GMP) regulations (21 CFR, Part 111), the FDA and Department of Health and Human Services (HHS) assumed oversight of GMP enforcement.

Under this rule, all foreign and domestic companies that are involved in manufacturing, packaging, and labeling, testing, quality control, and distribution of nutraceuticals in the US, have safety-related responsibilities as following:

Assuring the safety of the ingredients used in their products, both before and after introduction to the market.

Evaluating the identity, purity, quality, strength, and composition of dietary supplements.

Preparing, packaging, and holding products in compliance with FDA's current good manufacturing practice (GMP) regulations.

Submitting reports to FDA of serious adverse events.

The market for nutraceuticals in the United States is highly mature, and the market is expected to grow at a sluggish rate in the coming years. The same trend is likely to be seen for the nutraceutical excipients market in the country.

Some of the key players in the global market are Kerry Inc., ABF Ingredients, Roquette Freres, Evonik Industries AG, and DuPont, among others.

In Feb 2020, Evonik acquires US-based phytochemical company Wilshire Technologies Inc.

In Feb 2020, Evonik has successfully closed the acquisition of the US company PeroxyChem for US\$640 million after the responsible court in Washington D.C. dismissed the lawsuit filed by the Federal Trade Commission (FTC) to block the acquisition.

In Nov 2019, Evonik and Dow to develop an industrial-scale direct synthesis of propylene glycol from propylene and hydrogen peroxide

Our Global Nutraceutical Excipients market report provides deep insight into the current and future state of the Nutraceutical Excipients market across various regions. Also, the study comprehensively analyzes the Nutraceutical Excipients market by segments based on form (Dry and Liquid), by function (Coating Agents, Fillers & Diluents, Binders, Lubricants, Flavoring Agents, and others), by end product (Proteins & Amino Acids, Prebiotics, Probiotics, Vitamins, Minerals, and others) and, by Geography (Asia Pacific, North America, Europe, South America, and Middle-East and Africa). The report examines the market drivers and restraints, along with the impact of Covid-19 are influencing the market growth in detail. The study covers & includes emerging market trend, market developments, market opportunities, nutraceutical excipients market size, market estimates, nutraceutical excipients market analysis, market dynamics, and challenges in the industry. This report also covers extensively researched competitive landscape sections with profiles of major companies, including their market share and projects.

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