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Global Bio-based Calcium D-Pantothenate Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Bio-based Calcium D-Pantothenate market size is expected to reach $ 390 million by 2032, rising at a market growth of 9.0% CAGR during the forecast period (2026-2032).

In 2025, global production of bio-based calcium D-pantothenate was approximately 26,000 tonnes, with an average global market price of around $7,800 per tonne. That year, total global production capacity for the product reached approximately 43,000 tonnes, and the industry's average gross profit margin stood at about 25%. Bio-based calcium D-pantothenate is a Vitamin B5 product derived from renewable carbon sources—such as glucose, sucrose, molasses, or starch hydrolysates—through microbial fermentation followed by chemical salt formation. Chemically, it is the calcium salt of biologically active D-pantothenic acid, typically represented by the molecular formula C??H??CaN?O??. Due to the limited stability and processing suitability of free pantothenic acid, it is commonly marketed as a calcium D-pantothenate powder or granule for use in foods, dietary supplements, pharmaceuticals, and animal feed. D-pantothenic acid is a crucial component of Coenzyme A and acyl carrier proteins, playing a vital role in the metabolism of fats, carbohydrates, and proteins; commercial calcium D-pantothenate generally exhibits excellent water solubility, storage stability, and blending characteristics. The term "bio-based" here primarily indicates that the carbon backbone of the pantothenic acid is derived from renewable raw materials via fermentation; it does not imply that the product is biodegradable, nor should it be confused with the biologically inactive L-form or DL-form of calcium pantothenate.

The upstream segment of the bio-based calcium D-pantothenate value chain primarily encompasses raw materials such as corn starch sugars, glucose, sugarcane molasses, and other fermentable carbon sources, alongside ?-alanine, pantoic acid precursors,

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engineered microbial strains, culture media, enzyme preparations, and fermentation equipment. Modern production typically employs metabolic engineering to modify industrial microorganisms—such as *Escherichia coli* or *Corynebacterium glutamicum*—to enhance pantothenic acid biosynthetic pathways, thereby converting renewable sugar sources into D-pantothenic acid or fermentation broth intermediates. Core upstream competitiveness centers on strain yield, fermentation concentration, sugar conversion efficiency, impurity control, and the stability of raw material supplies; factors such as carbon source prices, the consumption of nitrogen sources and nutrient salts, and aseptic control during fermentation directly impact production costs. For food- and feed-grade products, upstream raw materials must also meet requirements regarding traceability, non-GMO declarations, allergen status, and relevant regulatory standards. The midstream segment consists of vitamin manufacturers, fermentation companies, and nutritional ingredient suppliers responsible for processes including seed culture, aerobic fermentation, cell separation, decolorization and desalting, concentration and purification, as well as salt formation (reacting D-pantothenic acid with a calcium source), crystallization, drying, and sieving. Depending on the intended application, it can be further processed into high-purity D-calcium pantothenate powder, granules, spray-dried products, and premixes. Key technical challenges lie in controlling the content of D-isomers, residual organic acids, inorganic salts, moisture, and color, while ensuring stability during long-term storage and the feed pelleting process. Animal nutrition represents one of the largest downstream applications for bio-based D-calcium pantothenate; it is commonly added to vitamin premixes, compound feeds, and pet foods to support energy metabolism, growth, skin health, and feed utilization. The European Union has authorized D-calcium pantothenate as a nutritional feed additive for various animal species. In the food and dietary supplement sectors, it is primarily used in tablets, capsules, beverages, breakfast cereals, and fortified foods, while the pharmaceutical sector utilizes it in vitamin preparations, compound nutritional products, and specific medicinal formulations. Although the personal care industry predominantly uses its derivative, D-panthenol, D-calcium pantothenate is also incorporated into certain "nutricosmetic" and functional formulations. Future market growth will be driven by the expansion of the global feed industry, the premiumization of pet nutrition, the demand for food fortification, and cost reductions in fermentation-based vitamin production; meanwhile, industry competition will continue to center on strain efficiency, product purity, fermentation costs, regulatory registration, and the ability to ensure stable global supply.

Calcium D-pantothenate is a key commercial form of Vitamin B5, widely used in premixes for livestock, aquaculture, and pet feed to support energy metabolism, growth, and feed utilization. As the global intensive livestock, aquaculture, and pet food

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industries continue to expand, there remains steady demand for vitamin ingredients that offer formulation stability, ease of blending, and high bioavailability.

Beyond feed-grade applications, Calcium D-pantothenate is used in breakfast cereals, beverages, tablets, capsules, syrups, and multivitamin formulations. With growing consumer interest in energy metabolism, comprehensive nutrition, and functional foods, demand is expected to rise for food- and pharmaceutical-grade products, as well as those meeting specific standards such as vegan, Halal, Kosher, and allergen-free certifications.

The competitiveness of bio-based Calcium D-pantothenate hinges on the performance of engineered strains, sugar conversion rates, the cost of key intermediates (such as ?-alanine), and the efficiency of downstream processes like separation, desalting, and crystallization. Moving forward, companies are likely to employ metabolic engineering to boost D-pantothenate yields and fermentation concentrations. They will also seek to strengthen integrated production chains—linking glucose to ?-alanine (or pantothenate intermediates) and finally to Calcium D-pantothenate—to minimize reliance on external intermediates and mitigate the impact of price volatility. Regulatory bodies continue to review applications for the use of engineered *E. coli* to produce Calcium D-pantothenate as a nutritional additive for all animal species; this underscores that strain safety, residue control, and production consistency will remain critical focal points for industry technology and market access.

Report Scope

This report studies the global Bio-based Calcium D-Pantothenate production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Bio-based Calcium D-Pantothenate and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Bio-based Calcium D-Pantothenate that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Bio-based Calcium D-Pantothenate total production and demand,

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2021-2032, (Tons)

Global Bio-based Calcium D-Pantothenate total production value, 2021-2032, (USD Million)

Global Bio-based Calcium D-Pantothenate production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Bio-based Calcium D-Pantothenate consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Bio-based Calcium D-Pantothenate domestic production, consumption, key domestic manufacturers and share

Global Bio-based Calcium D-Pantothenate production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Bio-based Calcium D-Pantothenate production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Bio-based Calcium D-Pantothenate production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Bio-based Calcium D-Pantothenate market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include BASF, Alfa Chemistry, Anhui Huaheng Biotechnology Co.,Ltd., Yifan Pharmaceutical, Zhejiang Hangzhou Xinfu Pharma, Shandong Hwatson Biochem, Xinfa Pharmaceutical, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Bio-based Calcium D-Pantothenate market

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Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) and average price (US$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Bio-based Calcium D-Pantothenate Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Bio-based Calcium D-Pantothenate Market, Segmentation by Type:

Purity:98%-99%

Purity:>99%

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Global Bio-based Calcium D-Pantothenate Market, Segmentation by Production Technology Route:

Fermentation-Chemical Salt Formation

Bio-based Intermediate Coupling

Enzyme-catalyzed Synthesis

Others

Global Bio-based Calcium D-Pantothenate Market, Segmentation by Renewable Raw Material Source:

Sugar-based Calcium D-pantothenate

Starch-based Calcium D-pantothenate

Lignocellulose-based Calcium D-pantothenate

Others

Global Bio-based Calcium D-Pantothenate Market, Segmentation by Physical Form:

Powder-form Calcium D-pantothenate

Granular Calcium D-pantothenate

Microencapsulated or Coated Calcium D-pantothenate

Global Bio-based Calcium D-Pantothenate Market, Segmentation by Application:

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Feed

Pharmaceutical

Cosmetics

Food Additives

Others

Companies Profiled:

BASF

Alfa Chemistry

Anhui Huaheng Biotechnology Co.,Ltd.

Yifan Pharmaceutical

Zhejiang Hangzhou Xinfu Pharma

Shandong Hwatson Biochem

Xinfa Pharmaceutical

Key Questions Answered:

1. How big is the global Bio-based Calcium D-Pantothenate market?
2. What is the demand of the global Bio-based Calcium D-Pantothenate market?
3. What is the year over year growth of the global Bio-based Calcium D-Pantothenate market?
4. What is the production and production value of the global Bio-based Calcium D-Pantothenate market?
5. Who are the key producers in the global Bio-based Calcium D-Pantothenate market?
6. What are the growth factors driving the market demand?

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