

Natural Source Vitamin E (Tocopherols and Tocotrienols) - An Indian Market Overview

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Abstracts

Indian Natural Vitamin E market is in infant stage and is growing at a healthy rate. Currently, natural vitamin E is being mainly used in dietary supplements followed by fortification of foods & beverages and cosmetics. Preference towards the application of Natural Vitamin E in animal feed is expected to pick up in next couple of years which is almost negligible or very low at present.

Industry participants also expect that natural vitamin E is preferred to use, especially in high end pet food segment. Inline to the expansion of Indian nutraceutical market, the demand for vitamins has been increased over the years. Global leading nutraceutical companies such as Amway and Herbalife are investing in manufacturing nutraceuticals in India either directly or through contract manufacturers.

The Indian natural vitamin E market is composed of dietary supplements, fortified foods & beverages and cosmetics. Dietary supplements segment leads the market followed by food & beverages. In India, Baddi (Himachal Pradesh) and Bangalore (Karnataka) are the regions with highest number of nutraceutical manufacturers. These companies have been preferred partners for international as well as domestic pharma and nutraceutical manufacturers.

Natural source Vitamin E products analyzed in this study include Tocopherols and Tocotrienols. The end use application markets covered in the report include Animal Feed, Nutritional/Dietary Supplements, Food & Beverages and Cosmetics. The report reviews, analyses and projects the natural source vitamin E market for India.

Indian Natural Vitamin E volume market, estimated at 24.5 metric tons with a value of US\$1.9 million in 2013 and forecast to be 27.1 metric tons valued at US\$2.2 million in

2014, is further projected to reach 55.1 metric tons worth US\$5.4 million by 2020, thereby maintaining a volume CAGR of 11.7% and a value CAGR of 15.8% between 2012 and 2020.

The study includes 38 charts (includes a data table and graphical representation for each chart), supported with meaningful and easy to understand graphical presentation, of market numbers. The statistical tables represent the data for the global market value in metric tons and value in US\$ by geographic region, the product segment and application area. The report also provides the listing of the companies engaged in the manufacturing and supply of natural vitamin E as well as major players in the vitamin E end-use industries such as human nutrition, animal nutrition and personal care. The list of companies covers addresses, contact numbers and the website addresses of 78 Indian companies and 94 international companies.

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 - DSM Nutritional Products, LLC/Cargill Inc
 - Eisai Food & Chemical Co Ltd
 - Fenchem Biotek Ltd
 - Jiangsu Spring Fruit (JSF) Biological Products Co Ltd
 - Riken Vitamin Co Ltd
 - Tama Biochemical Co Ltd
 - Vitae Naturals (Formerly Vitae Caps SA)
 - Zhejiang Medicine Co Ltd
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ADM Agro Industries India Private Limited
Anshul Life Sciences
BASF India Ltd.
DSM Nutritional Products (India) Ltd
K. Sevantilal & Co.
Kalgov Labs Limited
Matrix Universal (Marathwada Chemical Industries Pvt Ltd)
Privi Pharma Pvt. Ltd
Salchm India

6.2 Vitamin E End-Use Industry Players

Amway India Enterprises Pvt Ltd
Cachet Pharmaceuticals Pvt Ltd
Dr. Reddy's Laboratories Limited
Geltec Private Limited
Herbalife International India Pvt Ltd
India Glycols Ltd.
Inlife Healthcare
Leeford Healthcare Ltd.
Sami Labs Limited
Sarvotham Care Limited
Softesule Private Limited
Softgel Healthcare Pvt Ltd
Stallion Laboratories Pvt Ltd
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About

Majority of the natural vitamin E produced globally is from GM (Genetically Modified) soybean oil deodorized distillate (SODD). But, natural vitamin E produced from non-GM soybean distillate has a good demand in western countries especially European. In Europe, non-GM label is mandatory and is widely accepted all over the Europe. Also, non-GM derived natural vitamin E has a higher price tag compared to GM derived natural vitamin E. Natural vitamin E is produced widely from soybeans and India is the country where xxx% of soybeans produced are non-GM. Each year India produces around x.x million metric tons of soybean oil. Among these x.x million tons xx% of the oil goes for biodiesel production in India, and left out soybean oil for refining edible oil is around x.xx million tons. During the production of refined soybean oil, soybean deodorizer distillate (SODD) is produced as byproduct of a deodorization step. The SODD corresponds between x.x% and x.x% of crude soybean oil i.e. xxxx tons to xxxx tons of SODD each year depending on the SODD concentration and refining process. As per industry participants' opinion, SODD derived from refining process will be around xxxx tons per year in India. Tocopherols concentration in Indian origin SODD is around x% to x%. If we assume a x% of natural vitamin E concentration in SODD, so it is possible to produce around xx metric tons of non-GM natural vitamin E from SODD that is being produced in India. Each year around xxx to xxxx metric tons of non-GM SODD is being exported overseas, especially for the manufacturing of natural vitamin E. Availability of SODD for the production of natural vitamin E in India is low at present, but in the future it is expected, according to experts, that the production of soybean oil will grow double fold every five years, so the availability of SODD.

In terms of volume, Dietary Supplements constitute the largest end-use application for Natural Vitamin E in India, cornering an estimated share of xx.x% in 2013 that equates to xx.x metric tons. Indian consumption of Natural Vitamin E for Dietary Supplement applications, forecast at xx.x metric tons in 2014, is further expected to post a 2012-2020 CAGR of xx.x% in reaching a projected xx metric tons by 2020. Volume consumption of Natural Vitamin E for Food & Beverage and Cosmetic applications in India is likely to witness comparatively slower CAGRs of xx.x% and x.x%, respectively, over the 2012-2020 analysis period. Industry Experts estimates that utilization of Natural Vitamin E in Animal Feed applications would commence from the year 2015, with a demand of x.x metric tons in that year, which would increase to more than one metric ton by 2020 to reflect a CAGR of xx.x% between 2015 and 2020.

In terms of value, too, the Indian market for Tocopherols is the largest, accounting for

an estimated 2013 share of xx.x% translating into US\$x.x million. Demand for Tocopherols in India is forecast to be US\$x.x million in 2014 and further projected to reach US\$x.x million by 2020, thereby reflecting a CAGR of xx.x% between 2012 and 2020. Though accounting for the smaller share estimated at xx.x% equating to US\$x.x million in 2013, value demand for Tocotrienols in India is likely to record the faster CAGR of xx.x% over 2010-2020 and reach a projected US\$x.x million by 2020. The sizeable growth witnessed by Tocotrienols in India between 2010 and 2012 in terms of volume consumption is also evidenced in terms of value growth, as the table below depicts.

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