

Nutraceutical Ingredients Market by Type (Proteins, Amino Acids, and Probiotics), Application (Food, Beverages, Animal Nutrition, Dietary Supplements, Food For Special Medical Purposes (FSMP)), Form, Function, & Region - Global Forecast to 2029

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Abstracts

The global nutraceutical ingredients market is on a trajectory of significant expansion, with an estimated value projected to reach USD 136.1 billion by 2029 from the 2024 valuation of USD 105.2 billion, displaying a promising Compound Annual Growth Rate (CAGR) of 5.3%.

“Regulatory support and collaborative efforts across public and private sectors in eradicating undernourishment fuels the demand for nutraceutical ingredients market.”

In order to combat widespread deficiencies, governments and non-governmental organisations (NGOs) are championing initiatives that highlight the significance of nutrition. Large-scale food fortification initiatives, for instance, have greatly increased the global adoption of fortified foods. These initiatives are supported by organisations such as PATH (Program for Appropriate Technology in Health). PATH's nutrient-fortifying rice kernels (UltraRice) initiative has proven scalable and effective in Burundi, India, Brazil, and other countries, impacting regulatory frameworks and nutritional policies. In addition to addressing nutritional deficiencies, these initiatives establish guidelines that promote the use of fortified ingredients in food processing.

Nutraceutical ingredients are becoming more and more popular in animal nutrition to improve feed formulations. Improved feed additives aim to enhance animal health, growth efficiency, and product quality, meeting the rising demand for high-quality protein sources globally.

Partnerships within the industry further accelerate market expansion. For instance, Olam Agri Holdings Pte Ltd has committed to fortifying staple foods with essential micronutrients at scale, so millions can be reached every day by 2030. Such initiatives promote the industry's dedication to sustainability and public health while accelerating the global uptake of fortified foods. The market is anticipated to grow further due to ongoing innovation, regulatory support, and cross-sector collaboration, solidifying nutraceutical ingredients' position as a key component of global health and wellness initiatives in the future.

“During the forecast period, the food for special medical purposes (FSMP) within the application segment is estimated to witness the highest CAGR in the nutraceutical ingredients market.”

Food specially prepared to meet special, often disease- or medical-condition-related nutritional requirements of individuals is known as food for special medical purposes. The increasing prevalence of chronic diseases and disorders, such as diabetes, gastrointestinal problems, metabolic syndromes, and others, has been the primary driver for the ever-growing demand for nutraceutical ingredients in FSMP. For instance, the IDF Diabetes Atlas for 2021 estimates that 1 in 10 adults worldwide, or 537 million adults aged 20 to 79, have diabetes at present. By 2030, this number is expected to rise to 643 million, and by 2045, it is expected to reach 783 million. Among the specific health benefits that nutraceutical ingredients provide to these patient populations are symptom management, improved nutritional intake, and support for overall health.

Moreover, the prevalence of food allergies and intolerances has heightened the need for specialized FSMP formulations that are free from allergens and tailored to individual dietary restrictions. This necessitates the addition of nutraceutical ingredients that are not only safe but have the efficacy to meet nutritional requirements without adverse reactions. Regulatory agencies, which provide support through developments in medical nutrition therapies, are also boosting this segment by ensuring that stringent health standards are met while allowing innovations in ingredient formulation.

“High healthcare costs driving demand for preventive healthcare have positioned the US in North America region as the dominant market in the nutraceutical ingredients market.”

The US holds a dominant position in the North American nutraceutical ingredients market. There is a great need for preventive healthcare solutions due to the high cost of

healthcare in the country. According to a piece by the PETER G. Peterson Foundation, US healthcare spending hit USD 4.5 trillion in 2022, or USD 13,493 per person, much more than in other wealthy countries. Due to such high healthcare costs, Americans are encouraged to spend money on nutraceutical ingredients and other preventive measures in order to maintain their health and lower their long-term medical costs.

A 2023 CRN Consumer Survey on Dietary Supplements stated that 74 percent of US adults take dietary supplements, with 55 percent among them taking them regularly. This simply indicates the importance of dietary supplements in promoting health in the nation. The desire for proactive health management in the face of rising healthcare costs and rising consumer awareness are the driving forces behind this widespread use. This growth is also supported by strong research and development activities and a very encouraging regulatory environment that allows innovation in health products. Businesses in the US are better able to develop and commercialize innovative nutraceutical ingredients because of their sophisticated infrastructure and highly qualified workforce.

The break-up of the profile of primary participants in the nutraceutical ingredients market:

By Company Type: Tier 1 – 51%, Tier 2 – 26%, and Tier 3 – 23%

By Designation: CXO's – 24%, Managers – 43%, Executives- 33%

By Region: North America – 25%, Europe – 20%, Asia Pacific – 45%, South America – 5%, and Rest of the World –5%

Prominent companies include Cargill, Incorporated (US), ADM (US), International Flavors & Fragrances Inc. (US), BASF SE (Germany), Arla Foods amba (Denmark), Associated British Foods plc (UK), dsm-firmenich (Switzerland), Ingredion (US), Tate & Lyle (UK), Ajinomoto Co., Inc. (Japan), and Chr. Hansen A/S (Denmark).

Research Coverage:

This research report categorizes the nutraceutical ingredients market by applications (food, beverages, animal nutrition, dietary supplements, and foods for special medical purposes (FSMP)), type (proteins, amino acids, fibers & specialty carbohydrates, probiotics, phytochemicals & plant extracts, prebiotics, functional fats & oils, vitamins,

minerals, carotenoids, and other types), form (dry and liquid), function (qualitative), and region (North America, Europe, Asia Pacific, South America, and Rest of the World).

The report covers information about the key factors, such as drivers, restraints, opportunities, and challenges impacting the growth of the nutraceutical ingredients market. It also provides a detailed analysis of the major players in the market including their business overview, products offered; key strategies; partnerships, new product launches, expansions, and acquisitions. Competitive benchmarking of upcoming startups in the nutraceutical ingredients market is covered in this report.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall nutraceutical ingredients market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Growing demand for fortified food due to increased health consciousness

among consumers), restraints (Higher costs of fortified products dissuade large-scale usage and adoption), opportunities (Nutraceuticals as alternatives for pharmaceuticals), and challenges (Combating counterfeiting in the nutraceutical industry) influencing the growth of the nutraceutical ingredients market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the nutraceutical ingredients market.

Market Development: Comprehensive information about lucrative markets – the report analyses the nutraceutical ingredients market across varied regions.

Market Diversification: Exhaustive information about new products, untapped

geographies, recent developments, and investments in the nutraceutical ingredients market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players such as Cargill, Incorporated (US), ADM (US), International Flavors & Fragrances Inc. (US), BASF SE (Germany), Arla Foods amba (Denmark), Associated British Foods plc (UK), dsm-firmenich (Switzerland), Ingredion (US), Tate & Lyle (UK), Ajinomoto Co., Inc. (Japan), and Chr. Hansen A/S (Denmark) among others in the nutraceutical ingredients market strategies. The report also helps stakeholders understand the nutraceutical ingredients market and provides them with information on key market drivers, restraints, challenges, and opportunities.

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About

Nutraceutical ingredients market is an emerging sector with various stake holders such as raw material suppliers, processors, product manufacturers and end-use consumers.

The product includes functional food, beverages, dietary supplements, animal nutrition and personal care. The nutraceutical product and ingredients market are inter-dependant on each other as any shift in one will have a direct impact on the other. Growing awareness and reliability on the nutraceutical products is offering a strong consumer base for the market. Nutraceutical ingredients are essential for various health purposes and prevent chronic diseases that may occur due to lack of required nutrients in the body.

The major nutraceutical ingredients include Prebiotics, Probiotics, Amino acids, peptides & proteins, omega 3 & structured lipids, phytochemicals & plant extracts, Minerals, Vitamins, Fibers & specialty carbohydrates, carotenoids & antioxidants. These ingredients are obtained from the various plant sources, suppliers, poultry farms etc and are served in the form of functional food, beverages, personal care products and supplements to the consumers. With changing lifestyles, consumers are tilted towards healthy diet and are more concerned about the consumption of healthy nutrients due to fear of deficiency and chronic diseases. Therefore, the market for these ingredients is getting a push and is served with wide opportunities.

On the whole, the market for Asia-pacific is a dominant one with highest growth rate and share. The market holds the power because of ever growing population and urbanization in various developing nations of the region. The market for Asia-Pacific is expected to experience growth of 7.4% from 2013 to 2018. The four most potential nations for nutraceutical ingredients industry are India, China, Brazil and Russia.

Dietary supplements form the major application of nutraceutical ingredients as earlier the nutraceutical were served as pharmaceutical products. Hence, the majority of ingredients were served in the form of tablets, capsules, etc. In most of the nations, people are not aware of concept of functional food and beverages. However, the concept is getting familiar with growth and development in the economy. The market for dietary supplements is expected to reach \$13.0 billion by 2018 whereas functional beverages is expected to experience the highest growth rate of 7.4% from 2013 to 2018.

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