

# Vitamin B1 Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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## Abstracts

Vitamin B1 Market Summary

### Introduction

The Vitamin B1 market, centered on thiamine, a vital water-soluble vitamin essential for carbohydrate metabolism, nervous system function, and energy production, serves critical roles in human and animal health. Also known as thiamine hydrochloride or thiamine mononitrate, Vitamin B1 is utilized across three primary applications: feed, food, and pharmaceutical industries, addressing animal nutrition, fortified foods, and dietary supplements or medical formulations. The market is driven by increasing global demand for nutritional supplements, rising health awareness, and the expansion of livestock and aquaculture industries, particularly for feed-grade thiamine to enhance animal growth and health. The pharmaceutical sector benefits from Vitamin B1's role in treating conditions like beriberi and neurological disorders, while the food industry leverages it for fortifying cereals, beverages, and functional foods. The market is highly concentrated, with Jiangxi Tianxin Pharmaceutical leading global production with a capacity of 7,000 tons annually, followed by Xinfu Pharmaceutical (3,300 tons after smart manufacturing upgrades), Brother Enterprises (3,200 tons), and Huazhong Pharmaceutical (3,000 tons). Asia Pacific, particularly China, dominates production and consumption due to its robust manufacturing infrastructure and growing health-conscious population. Emerging trends include clean-label and vegan-friendly Vitamin B1 formulations, high-purity products for pharmaceuticals, and sustainable production processes to align with environmental regulations. Challenges include volatile raw material prices, stringent regulatory compliance, and environmental concerns associated with chemical synthesis, which impact market dynamics.

## Market Size and Growth Forecast

The global Vitamin B1 market is projected to reach USD 0.7–0.9 billion by 2025, with an estimated compound annual growth rate (CAGR) of 5%–7% through 2030. This growth is driven by rising demand for fortified foods, dietary supplements, and feed additives, supported by increasing global livestock production and advancements in production efficiency.

## Regional Analysis

Asia Pacific is expected to lead the Vitamin B1 market with a growth rate of 6%–8%, driven by China, India, and Japan. China dominates due to its large-scale production capacity, led by companies like Jiangxi Tianxin and Xinfu Pharmaceutical, and strong demand from feed and food industries. India's expanding food processing and pharmaceutical sectors fuel demand for fortified products and supplements, while Japan's aging population drives pharmaceutical-grade Vitamin B1 for neurological health. The region's growing livestock and aquaculture sectors further boost feed-grade demand.

North America follows with a growth rate of 4.5%–6.5%, led by the United States and Canada. The U.S. market is propelled by high consumer demand for nutritional supplements and fortified foods, with companies like DSM-Firmenich focusing on high-purity products. Canada's health and wellness trends support growth in food and pharmaceutical applications, with emphasis on clean-label formulations.

Europe, with a growth rate of 4%–6%, is driven by Germany, France, and the UK. Germany's strong food and pharmaceutical industries demand high-quality Vitamin B1, while France and the UK prioritize plant-based and clean-label products. The region's stringent food safety regulations shape market trends toward sustainable production.

South America, with a growth rate of 3.5%–5.5%, sees demand in Brazil and Argentina, driven by expanding livestock and food processing industries. Brazil's poultry and aquaculture sectors fuel feed-grade Vitamin B1 demand, though economic volatility limits broader adoption.

The Middle East and Africa, with a growth rate of 3%–5%, are led by the UAE and South Africa. The UAE's growing health supplement market drives pharmaceutical demand, while South Africa's livestock sector supports feed applications. Limited

manufacturing infrastructure poses challenges to growth.

## Application Analysis

**Feed:** Expected to grow at 5.5%–7.5%, this segment dominates due to the global rise in livestock and aquaculture production. Feed-grade Vitamin B1 enhances animal metabolism and growth efficiency, particularly in poultry and swine. Trends focus on high-potency, sustainable formulations to meet increasing global meat consumption.

**Food:** With a growth rate of 4.5%–6.5%, this segment supports fortified foods like cereals, bakery products, and beverages, driven by consumer demand for functional nutrition. Trends include clean-label, plant-based Vitamin B1 products and innovations in heat-stable formulations for diverse food applications.

**Pharmaceutical:** Projected to grow at 4%–6%, this segment addresses dietary supplements and medical formulations for neurological health, cardiovascular support, and thiamine deficiency conditions. Trends emphasize high-purity, vegan-friendly products and integration into personalized nutrition solutions.

## Key Market Players

**DSM-Firmenich:** A Swiss-Dutch company, DSM-Firmenich produces high-purity Vitamin B1 for food, pharmaceutical, and feed applications, focusing on sustainable and innovative nutritional solutions.

**Brother Enterprises Holding:** A Chinese firm, Brother Enterprises manufactures Vitamin B1 with a capacity of 3,200 tons annually, specializing in feed and food-grade products for domestic and export markets.

**Jiangxi Tianxin Pharmaceutical:** A Chinese company, Jiangxi Tianxin leads global Vitamin B1 production with a capacity of 7,000 tons annually, providing feed, food, and pharmaceutical-grade products.

**Huazhong Pharmaceutical:** A Chinese manufacturer, Huazhong Pharmaceutical produces Vitamin B1 with a capacity of 3,000 tons, targeting pharmaceutical and feed applications in China's growing health and livestock sectors.

**Xinfa Pharmaceutical:** A Chinese firm with a capacity of 3,300 tons after smart manufacturing upgrades, Xinfa Pharmaceutical focuses on feed and pharmaceutical-

grade Vitamin B1, serving both domestic and international markets.

## Porter's Five Forces Analysis

**Threat of New Entrants: Moderate.** The Vitamin B1 market has high barriers, including significant capital investment for large-scale production facilities and stringent regulatory compliance for food and pharmaceutical grades. Established players like Jiangxi Tianxin and DSM-Firmenich dominate with economies of scale, but new entrants in Asia with cost-competitive offerings slightly increase the threat.

**Threat of Substitutes: Low to Moderate.** Alternatives like other B vitamins or natural thiamine sources exist, but Vitamin B1's unique metabolic role limits substitution. Natural food sources pose a moderate threat in the food segment but lack scalability for feed and pharmaceutical applications.

**Bargaining Power of Buyers: Moderate to High.** Buyers, including feed manufacturers, food processors, and pharmaceutical companies, have negotiating power due to multiple suppliers, particularly in Asia Pacific. However, high-purity pharmaceutical-grade products and brand loyalty to firms like DSM-Firmenich balance buyer power.

**Bargaining Power of Suppliers: High.** Suppliers of raw materials, such as chemical precursors and intermediates, hold significant leverage due to concentrated supply chains, particularly in China and Europe, and volatile commodity prices.

**Competitive Rivalry: High.** The market is highly competitive, with global leaders like DSM-Firmenich and Jiangxi Tianxin competing on quality, production capacity, and innovation. Chinese firms like Brother Enterprises and Xinfa intensify rivalry in cost-sensitive feed and food segments, driving competition through affordability and scalability.

## Market Opportunities and Challenges

### Opportunities

**Rising Health Awareness:** Growing consumer focus on preventive healthcare,

particularly in North America and Asia Pacific, drives demand for Vitamin B1 in dietary supplements and fortified foods.

**Livestock Industry Growth:** The global increase in poultry, swine, and aquaculture production, especially in China and Brazil, fuels demand for feed-grade Vitamin B1 to enhance animal health and efficiency.

**Clean-Label Trends:** Increasing consumer preference for plant-based and clean-label products in Europe and North America creates opportunities for innovative, vegan-friendly Vitamin B1 formulations.

**Pharmaceutical Advancements:** The rise of personalized nutrition and treatments for neurological and cardiovascular health supports demand for high-purity pharmaceutical-grade Vitamin B1.

**Emerging Market Expansion:** Rapid urbanization and rising incomes in India, Brazil, and the UAE offer potential for affordable Vitamin B1 products in food and feed applications.

## Challenges

**Volatile Raw Material Costs:** Fluctuations in chemical precursor prices, particularly in concentrated supply chains, increase production costs and challenge profitability, especially for smaller players.

**Regulatory Complexities:** Stringent food and pharmaceutical regulations in Europe and North America require costly compliance measures, impacting market entry and expansion.

**Environmental Concerns:** Chemical synthesis processes for Vitamin B1 face scrutiny for environmental impact, particularly in Europe, driving demand for sustainable production methods.

**Supply Chain Dependencies:** Reliance on concentrated raw material suppliers in China and Europe exposes the market to geopolitical risks and logistical disruptions.

**Intense Price Competition:** The crowded feed-grade segment, especially in Asia

Pacific, drives price wars, pressuring margins for smaller manufacturers and limiting profitability.

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