

Carotenoids Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029 Segmented By Source (Synthetic Carotenoids and Natural Carotenoids), By Type (Astaxanthin, Beta-Carotene, Lutein, Lycopene, Canthaxanthin, and Zeaxanthin, Others), By Application (Feed, Food & Beverages, Dietary Supplements, Cosmetics, and Pharmaceuticals), By Formulation (Beadlet, Powder, Oil Suspension and Emulsion), By Region and Competition

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Abstracts

Global Carotenoids Market was valued at USD 1.78 Billion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 4.57% through 2029. Carotenoids are a group of organic pigments responsible for the vibrant red, yellow, and orange hues found in fruits and vegetables. These phytonutrients play a crucial role in plant health and serve as excellent sources of vitamin A and antioxidants. Carotenoids can be naturally synthesized by plants, algae, bacteria, and fungi, or produced synthetically. Papaya, pineapple, pumpkin, apricot, carrot, orange, and corn are among the primary natural sources of carotenoids. Commonly used carotenoids such as alpha and beta carotene, beta-cryptoxanthin, lutein, zeaxanthin, and lycopene are added as colorants in food, cosmetics, and animal feed products. In humans, carotenoids contribute to cancer treatment, vision improvement, and support physical growth and development.

Key Market Drivers

Increasing Demand for Natural Colorants

The global demand for natural colorants is on a rise, a trend largely propelled by an increased consumer preference for clean-label, nature-derived products in food, pharmaceuticals, and cosmetics. This growth in demand directly influences the global market for carotenoids, pigments that are naturally occurring in a wide array of fruits, vegetables, and certain types of seafood. As potent antioxidants, carotenoids offer various health benefits, including boosting immune function and eye health, which is an attractive proposition for health-conscious consumers. Further, the vibrant hues of carotenoids, ranging from yellow and orange to red, make them highly sought after as natural colorants in the food and beverage industry, especially considering the mounting consumer aversion to synthetic additives. In the cosmetic industry, their antioxidant properties are valued for skin care products. In the pharmaceutical sector, carotenoids are utilized due to their health benefits. This multifaceted utility drives the global demand for carotenoids. As consumers continue to seek natural and beneficial ingredients, the demand for carotenoids is expected to surge, in line with the growing demand for natural colorants.

Growing Use in Animal Feed to Improve Livestock Health

The escalating demand for carotenoids globally can be attributed to their growing use in animal feed to improve livestock health. Carotenoids, natural pigments found in numerous plants and algae, are revered for their substantial health benefits, including boosting immune response and reducing disease susceptibility. In the livestock industry, incorporating carotenoids into the diet of animals is becoming increasingly common. They are used to enhance meat quality by improving its color and to bolster the overall health and productivity of livestock. The rise in global meat consumption, coupled with the growing cognizance of the link between diet and health, is driving the demand for high-quality animal products. As consumers become more health-conscious, the pressure on livestock farmers to produce healthy, high-quality meat is intensifying. Consequently, the use of carotenoids in animal feed is expected to increase. In addition, the need for sustainable and efficient animal rearing practices is pushing the envelope for innovative feed ingredients such as carotenoids. As these trends continue, the demand for carotenoids in animal feed is predicted to grow significantly, contributing to the overall upswing in their global demand.

Surging Demand in Nutraceuticals

The global surge in demand for nutraceuticals is expected to significantly drive the demand for carotenoids. Nutraceuticals, food or food-based products providing health and medicinal benefits, are gaining popularity for their roles in disease prevention and health advancement. One of the critical components of many nutraceuticals is carotenoids, organic pigments found primarily in plants, algae, and some bacteria and fungi. Carotenoids are recognized for their antioxidant properties and potential benefits in reducing the risk of chronic diseases. As consumers become more health-conscious, the appeal of nutraceuticals fortified with carotenoids is growing, contributing to an elevated global demand. In addition, advancements in biotechnology and agriculture are making the production of carotenoids more efficient and sustainable, meeting the increasing demand without compromising the environment. This trend reflects a broader shift towards natural and functional ingredients in the food industry as part of a more holistic approach to health and well-being. Consequently, the carotenoids market is poised for robust growth, fueled by the escalating demand in the nutraceuticals sector.

Advancements in Extraction Technologies

Advancements in extraction technologies are expected to significantly bolster the global demand for carotenoids, compounds revered for their antioxidant properties and extensive use in food, cosmetics, and pharmaceutical industries. Novel techniques such as supercritical fluid extraction and subcritical water extraction are paving the way for efficient harvest of these valuable pigments from plant and microbial sources, thereby increasing their availability and reducing costs. Moreover, these advanced extraction methods are environmentally friendly, aligning with the rising global emphasis on sustainable practices. They eliminate the need for harmful solvents, reducing ecological footprint, and can efficiently extract carotenoids from waste materials, adding a layer of resource optimization.

Additionally, the advancements in technology also enable precise extraction and isolation of specific types of carotenoids, fostering their use in targeted applications. For instance, lycopene's potential in preventing certain types of cancers is under investigation, fueling its demand. In the era of health and wellness, the consumer's preference towards natural and functional ingredients is growing. Carotenoids, with their color imparting and health-contributing abilities, fit well into this trend. As extraction technologies continue to progress, enabling a wider and more cost-effective availability of carotenoids, their global demand is anticipated to rise dramatically.

Key Market Challenges

High Processing Cost

High processing costs significantly influence the global demand for carotenoids. Primarily, carotenoids are meticulously derived from various natural resources like algae, fruits, vegetables, and microbial fermentation. The extraction process is complex, requiring advanced technology and significant energy, leading to high cost. Furthermore, the purification and stabilization of these compounds enhance the overall processing cost. As a result, the final product becomes expensive, discouraging consumption and decreasing demand, particularly in cost-sensitive markets. Emerging economies, where the potential for market growth is high, are particularly affected by this issue. In these regions, consumers are price-sensitive, and the high cost of carotenoids limits their ability to become mainstream consumers. Additionally, the cost factor also discourages potential new entrants, thereby limiting market competition and innovation. As long as the processing cost remains high, it creates a barrier to widespread adoption of carotenoids, not just for end consumers but also for manufacturers and suppliers across the globe. Nonetheless, advancements in processing technology and the exploration of cheaper raw materials could potentially ease the high processing cost, stabilizing the carotenoids' demand globally.

Low Yield of Natural Food Colors

The global demand for carotenoids, naturally occurring pigments found in many fruits and vegetables, is expected to witness a decline owing to the low yield of natural food colors. As the food industry is gravitating towards natural, 'clean label' products, the pressure on manufacturers to switch to natural food colors, including carotenoids, has increased. However, it's a complex and challenging process to extract these colors, leading to low yields. This is primarily attributed to the inherent limitations of the natural sources like instability under certain conditions, extraction difficulties, and the effect of seasonal variations on the quality and quantity of the pigment. Additionally, the process is costly, involving extensive research, development, and extraction techniques, which makes natural food colors more expensive than their synthetic counterparts. This, coupled with the low yield, implies a higher production cost, making the end product less competitive in the global market. Furthermore, the high demand for carotenoids as natural food colors has led to concerns about the sustainability and environmental impact of their production. The cultivation and extraction of carotenoids require significant resources such as land, water, and energy, which can put strain on ecosystems and contribute to carbon emissions.

In light of these challenges, manufacturers and researchers are exploring alternative

sources and innovative technologies to enhance the yield and efficiency of carotenoid extraction. These include advancements in biotechnology, such as genetic engineering and fermentation, to produce carotenoids in a more sustainable and cost-effective manner. Moreover, the development of novel extraction methods and purification techniques aims to overcome the limitations of traditional processes, ensuring higher yields and improved quality. While the demand for carotenoids may potentially decrease in the short term, the pursuit of more cost-effective and reliable alternatives will continue to drive innovation in the food industry. As consumers increasingly seek natural and healthier options, finding sustainable solutions for natural food colors remains a key priority for manufacturers and researchers alike.

Key Market Trends

Increasing Use in Dietary Supplements

The global demand for carotenoids is expected to surge due to the increasing popularity of dietary supplements. Carotenoids, organic pigments found in many plants, are well-established for their antioxidant properties and health benefits, including boosting immune system function and reducing the risk of chronic illnesses. With growing health consciousness among consumers, dietary supplements enriched with carotenoids have been gaining traction. These supplements, often available in forms such as tablets, capsules, and soft gels, offer a convenient means of fulfilling nutritional gaps in the diet. Additionally, the escalating geriatric population worldwide, a demographic often reliant on dietary supplements to manage age-related health issues, is further fueling the demand for carotenoid-based products. Moreover, widespread marketing campaigns by manufacturers, emphasizing the health benefits of carotenoids, are heightening consumer awareness and propelling market growth. Therefore, the combination of health awareness, convenience, and targeted marketing is set to drive the global demand for carotenoids in the dietary supplement industry.

Increased Demand from The Pharmaceutical Industry

The global demand for carotenoids is set to witness a significant surge, driven largely by the pharmaceutical industry's increased appetite for these organic pigments. Carotenoids, known for their potent antioxidant properties, have been recognized for their potential role in preventing chronic diseases and promoting overall health. With mounting scientific evidence, the pharmaceutical industry has been quick to incorporate these valuable compounds into various products, ranging from dietary supplements to therapeutic drugs. The burgeoning health-conscious demographic, a direct result of

increased awareness about preventive healthcare, is further fueling this trend. This group is actively seeking natural alternatives for maintaining health, thus propelling the demand for carotenoid-infused pharmaceutical products. Moreover, the ongoing research to explore the full potential of carotenoids in disease prevention and health promotion is likely to uncover new applications, further driving demand. Factors such as the global aging population and increasing prevalence of lifestyle-related diseases also contribute towards this growing demand. As the pharmaceutical industry continues to innovate and expand its product range, the demand for carotenoids is expected to rise correspondingly, marking a positive growth trajectory for the global carotenoid market.

Segmental Insights

Source Insights

Based on the Source, the global carotenoids market is predominantly dominated by synthetic carotenoids. These synthetic variants have gained popularity due to their cost-effectiveness, easy availability, and stability. However, as consumers become more health-conscious and aware of the benefits of natural products, there is a noticeable shift towards natural carotenoids. The increasing demand for natural carotenoids is expected to reshape the dynamics of the market in the coming years, as consumers prioritize the use of natural ingredients in their dietary choices and seek out products that offer the utmost health benefits. This shift reflects a growing trend towards sustainability and a preference for organic, wholesome alternatives. As a result, the market is poised to witness significant changes in both supply and demand, with natural carotenoids poised to play a more prominent role in the industry.

Type Insights

Based on the Type, Beta-Carotene is currently leading the Global Carotenoids Market due to its exceptional properties and versatile applications. This natural pigment is extensively used in various sectors, including food and beverages, dietary supplements, and the cosmetics industry. One of the main reasons for Beta-Carotene's popularity is its potent antioxidant properties, which contribute to improved health and well-being. These antioxidants help combat harmful free radicals in the body, reducing the risk of chronic diseases and promoting overall wellness.

Moreover, Beta-Carotene's vibrant colours make it a sought-after ingredient in many products. The rich orange hue adds visual appeal and enhances the consumer experience, making it an ideal choice for food and beverage manufacturers, dietary

supplement brands, and cosmetic companies. With its numerous benefits and extensive applications, Beta-Carotene holds a prominent position in the ever-growing Carotenoids Market. Its versatility and ability to enhance both the aesthetic and functional aspects of products make it a key player in meeting the demands of consumers worldwide.

Regional Insights

The North American region has been consistently dominating the Global Carotenoids Market for several reasons. One of the key factors contributing to its dominance is the high level of consumer awareness about the numerous health benefits that carotenoids offer. This awareness has led to a significant increase in demand for carotenoid-rich products, such as dietary supplements, in the region. Additionally, the presence of a robust and well-established dietary supplement industry in North America further supports the growth of the carotenoids market. Moreover, it is worth mentioning that the region's thriving food and beverage industry also plays a crucial role in driving the demand for carotenoids. With a wide range of food and beverage products incorporating carotenoids for their natural color and nutritional properties, the North American market continues to witness a strong demand for these compounds. Overall, the combination of high consumer awareness, the presence of dietary supplement manufacturers, and a thriving food and beverage industry has established North America as a dominant force in the Global Carotenoids Market.

Key Market Players

Koninklijke DSM N.V.

BASF SE

Chr. Hansen Inc.

Cyanotech Corporation

Allied Biotech Corporation

Lycored Limited

Kemin Industries Inc.

Fuji Chemical Industry Co Ltd.

Novus International Inc. (Carotenoid Technologies, S.A.)

Döhler Group

Report Scope:

In this report, the Global Carotenoids Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Carotenoids Market, By Source:

Synthetic Carotenoids

Natural Carotenoids

Carotenoids Market, By Type:

Astaxanthin

Beta-Carotene

Lutein

Lycopene

Canthaxanthin

Zeaxanthin

Others

Carotenoids Market, By Application:

Feed

Food & Beverages

Dietary Supplements

Cosmetics

Pharmaceuticals

Carotenoids Market, By Formulation:

Beadlet

Powder

Oil Suspension

Emulsion

Carotenoids Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Carotenoids Market.

Available Customizations:

Global Carotenoids market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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