

India Health Ingredients Market By Type (Vitamins, Minerals, Prebiotics, Enzymes, Plant & Fruit Extracts, Probiotic Starter Cultures, Others), By Application (Food & Beverages, Personal Care, Animal Feed, Others), By Source (Synthetic, Plant, Animal, Others), By Function (Gut Health Management, Eye Health Management, Immunity Enhancement, Brain Health Management, Heart/Cardiovascular Health Management, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

India Health Ingredients Market was valued at USD USD 3.58 Billion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.89% through 2030. Health ingredients are components or substances that are incorporated into various foods, beverages, dietary supplements, pharmaceuticals, and other products with the primary aim of promoting and supporting human health and well-being. These ingredients are selected and used based on their specific nutritional, functional, or therapeutic properties. Health ingredients can come from a variety of sources, including plants, animals, minerals, and synthetic compounds. They are an essential component of the health and wellness industry, addressing diverse aspects of health, from nutritional needs to disease prevention and overall well-being. Many health ingredients provide essential nutrients like vitamins, minerals, proteins, and healthy fats that are vital for maintaining various bodily functions. For example, vitamins like vitamin C and vitamin D and minerals like calcium and iron are commonly used health ingredients. Some health ingredients have specific functional properties that make them

valuable in particular applications. For instance, dietary fiber is used as a functional ingredient for its role in promoting digestive health. Health ingredients may contain bioactive compounds, which are natural compounds that have a positive impact on health. Examples include antioxidants like resveratrol in red wine and lycopene in tomatoes.

The shift from curative to preventive healthcare is driving the demand for health ingredients. Consumers are increasingly looking for solutions that help prevent health issues and maintain good health. Urbanization and changing lifestyles have resulted in imbalanced diets and an increased need for nutritional supplementation. Health ingredients help bridge the nutritional gaps in urban diets. The fitness and sports nutrition segments are growing, with more people engaging in physical activities. Health ingredients play a vital role in sports nutrition, muscle recovery, and energy enhancement. Continuous innovation in health ingredients and product development is a driving force. Manufacturers are creating new, more effective, and appealing products to meet consumer demands. The growth of e-commerce platforms has made health ingredients more accessible to a wider consumer base. Online sales and expanding retail presence are driving market growth.

Key Market Drivers

Innovation and Product Development

Continuous research into new and existing health ingredients is essential. This involves studying the health benefits, safety, and efficacy of various compounds, including vitamins, minerals, botanicals, probiotics, and more. Nutraceuticals are products that provide health benefits beyond basic nutrition. Innovation in this space involves creating supplements, functional foods, and beverages that incorporate health ingredients to address specific health needs. The trend toward natural and organic products has driven innovation in sourcing and incorporating natural ingredients with health benefits, such as herbal extracts and organic vitamins. Personalized nutrition is gaining traction. Companies are developing products that cater to individual health concerns and dietary preferences, offering customized health ingredient solutions. Consumers are looking for products with clean labels, which has led to the development of clean-label supplements and foods. These products have minimal additives, preservatives, and artificial ingredients.

Innovations in bioavailability technologies are improving the body's absorption of health ingredients. This includes encapsulation, delivery systems, and nanoemulsions to

enhance efficacy. Health ingredient innovation often involves the discovery and application of functional compounds that address specific health concerns, such as antioxidants for skin health or probiotics for gut health. The growing interest in plant-based diets has led to the development of plant-based health ingredient products. Innovation includes sourcing plant-derived vitamins and minerals. With the COVID-19 pandemic, there has been a surge in the development of immune health products, including those containing vitamins, minerals, and botanicals known to boost immunity.

Sustainable sourcing and ethical practices in the health ingredient supply chain are becoming a focus of innovation. Brands are exploring sustainable ingredients and eco-friendly packaging. Product development includes ensuring that health claims are supported by scientific research and follow regulatory requirements. Health ingredients are increasingly integrated into pharmaceuticals and over-the-counter medications for specific medical conditions, such as vitamin supplements for deficiencies. Technology, such as mobile apps and wearables, is being incorporated into health ingredient products to track and monitor health and wellness goals. Innovations in taste and texture ensure that health products are palatable and enjoyable, which encourages consistent use. Companies often collaborate with research institutions, universities, and healthcare professionals to drive innovation and develop evidence-based health products. This factor will help in the development of the India Health Ingredients Market.

Increasing Demand of Fitness and Sports Nutrition

Athletes and fitness enthusiasts often seek health ingredients to enhance their physical performance. This includes ingredients like creatine, branched-chain amino acids (BCAAs), and caffeine, which can improve energy levels, endurance, and muscle recovery. Protein supplements, often containing ingredients like whey protein, casein, and plant-based protein sources, are a staple in sports nutrition. They are essential for muscle growth and repair. After intense workouts, the body requires nutrients for muscle recovery and repair. Ingredients like glutamine, turmeric, and collagen are used to support the body's recovery process. Ingredients like carbohydrates, electrolytes, and caffeine are used to provide energy and enhance endurance during workouts and competitions.

Fitness enthusiasts and athletes often focus on weight management. Ingredients like green tea extract, garcinia cambogia, and L-carnitine are incorporated into products to support weight loss and management. Proper hydration is crucial during physical activities. Electrolyte-rich health ingredients, such as potassium and sodium, are included in sports drinks and supplements. Convenient protein bars and shakes are

popular in the fitness industry. They are enriched with protein, fiber, and other health ingredients to support muscle growth and appetite control. Many athletes and fitness enthusiasts require joint support. Health ingredients like glucosamine and chondroitin sulfate are used to promote joint health and reduce the risk of injuries. Some health ingredients, such as caffeine and adaptogens like ashwagandha, are used to enhance mental focus and cognitive function, which can be valuable during workouts and competitions.

Maintaining a strong immune system is essential for athletes. Vitamins, minerals, and immune-boosting ingredients like echinacea are included in products to support immune health. Fitness and sports nutrition products often cater to individual goals and preferences. In India, 41.3% of adults aged 18 to 69 are physically inactive, falling short of the World Health Organization's recommended 150 minutes of moderate to vigorous physical activity per week. Alarming, women exhibit higher inactivity rates than men, with 52.4% of women not meeting the recommended levels of physical activity compared to 30.9% of men. This disparity is attributed to a range of factors, including cultural norms, societal perceptions, and challenges related to time management and motivation, highlighting the need for targeted interventions to address these barriers and promote healthier lifestyles across demographics. This personalization may involve customized blends of health ingredients based on the specific needs of athletes. Post-workout recovery supplements containing ingredients like BCAAs, glutamine, and antioxidants help reduce muscle soreness and promote quicker recovery. Fitness and sports nutrition emphasize the timing of nutrient intake, including the use of pre-workout and post-workout supplements. Health ingredients are carefully chosen to meet these timing requirements. This factor will pace up the demand of the India Health Ingredients Market.

Growing Pharmaceutical Integration

Health ingredients are often included in pharmaceuticals to provide specific medical and therapeutic benefits. For example, vitamin supplements may be prescribed to address deficiencies, and minerals like calcium and magnesium are included in antacids to treat conditions like heartburn and indigestion. Certain medications require additional nutrients to enhance their effectiveness or to mitigate potential side effects. Health ingredients are used to support the patient's overall health while undergoing treatment. Nutritional supplements, including vitamins, minerals, and amino acids, are commonly integrated into pharmaceuticals to ensure that patients receive essential nutrients during illness or recovery. Pediatric medications often include health ingredients to address the unique nutritional needs of children. Vitamins and minerals may be included to support

growth and development. For elderly patients, health ingredients are integrated into pharmaceuticals to address age-related nutritional deficiencies and promote healthy aging. Calcium and vitamin D supplements, for instance, may be added to medications to support bone health. The Economic Survey 2022-23 highlights India's position as a global leader in pharmaceutical production, ranking 3rd worldwide by volume and 14th by value. As the largest provider of generic medicines, India accounts for 20% of the global supply by volume. The country also leads in vaccine manufacturing, commanding a 60% market share globally. It fulfills 40-70% of the World Health Organization's (WHO) demand for Diphtheria, Tetanus, and Pertussis (DPT) and Bacillus Calmette–Guérin (BCG) vaccines, and 90% of its demand for measles vaccines. India's robust Active Pharmaceutical Ingredients (API) segment comprises 500 manufacturers, contributing approximately 8% to the global API market. Furthermore, India produces around 60,000 generic brands across 60 therapeutic categories, reaffirming its pivotal role in ensuring the global availability of affordable and essential medicines.

Combining health ingredients with medications can improve patient compliance. Multivitamins and minerals included in pharmaceuticals make it more convenient for patients to meet their nutritional needs. Certain health conditions may require the integration of health ingredients to manage symptoms and improve patient outcomes. For example, omega-3 fatty acids may be used to support cardiovascular health. With the increased focus on immune health, health ingredients like vitamins C and D are integrated into pharmaceutical products to bolster the immune system. Pharmaceuticals and ointments for wound care may include health ingredients such as zinc and vitamin E to support skin healing and tissue repair.

Health ingredients like glucosamine and chondroitin sulfate are integrated into pharmaceutical products aimed at relieving joint pain and supporting joint health. The integration of health ingredients like omega-3 fatty acids and B vitamins into psychiatric medications can support mental health and cognitive function. Health ingredients are incorporated into medications for geriatric patients to address age-related health concerns and nutritional deficiencies. Prenatal vitamins, which contain various health ingredients, are prescribed to expectant mothers to support fetal development and maternal health. This factor will accelerate the demand of the India Health Ingredients Market.

Key Market Challenges

Quality Control

Adhering to regulatory standards and compliance can be complex due to the evolving nature of regulations in the health and wellness industry. Navigating these regulations and ensuring that products meet quality standards can be challenging for manufacturers and suppliers. Sourcing high-quality raw materials for health ingredients can be a challenge. Ensuring the authenticity, purity, and quality of raw materials, especially for herbal and Ayurvedic ingredients, is crucial. Adulteration and contamination of health ingredients are concerns in the market. Ensuring that products are free from contaminants and adulterants is a quality control challenge. Maintaining consistency in product quality across different batches is crucial. Variability in the quality of raw materials and manufacturing processes can impact batch-to-batch consistency. Comprehensive testing and analysis of health ingredients are necessary to confirm their safety and efficacy. This can be expensive and time-consuming, especially for smaller manufacturers. The lack of standardized methods for testing and analyzing health ingredients can make it difficult to ensure consistent quality across the industry.

Sustainability and Ethical Sourcing

The demand for herbal health ingredients has led to the overharvesting of wild herbs, which can endanger certain plant species and disrupt local ecosystems. Clearing land for agriculture and cultivation of health ingredients can lead to deforestation, which not only affects the environment but also contributes to climate change. Unsustainable sourcing practices can lead to the loss of biodiversity, impacting the availability of various plant-based ingredients used in health products. The health ingredients market may involve the exploitation of labor in the harvesting and processing of raw materials, particularly in regions with weaker labor regulations. Unsustainable farming and harvesting practices can lead to the depletion of natural resources, including water and soil quality, affecting the long-term viability of ingredient sourcing. The use of synthetic chemicals, pesticides, and herbicides in agriculture and ingredient processing can harm the environment and human health.

Key Market Trends

Herbal and Ayurvedic Ingredients

Herbal and Ayurvedic remedies have a deep-rooted cultural and traditional significance in India. Many consumers prefer products that align with their cultural heritage and traditional practices. Herbal and Ayurvedic ingredients are often perceived as safer and more natural alternatives to synthetic or chemical-based products. This natural appeal resonates with health-conscious consumers. Ayurveda is a holistic healthcare system

that emphasizes the use of natural ingredients to promote well-being. The demand for Ayurvedic health products, including supplements, is on the rise. The holistic approach of Ayurveda to overall wellness aligns with the growing trend of seeking well-being that encompasses physical, mental, and emotional health. India has a wealth of traditional knowledge about the use of herbs and natural ingredients for health benefits. This knowledge is increasingly being integrated into modern health products. India boasts a rich biodiversity, making it a treasure trove of herbs and plants with potential health benefits. This diversity of herbal ingredients allows for a wide range of health product offerings. Ayurvedic herbs like ashwagandha, Brahmi, and tulsi are known for their stress-reducing properties. In a fast-paced world, these ingredients are highly sought after.

Segmental Insights

Type Insights

Based on type, vitamins segment held the largest market share in 2024 and is predicted to continue expanding over the coming years. There has been a growing awareness among Indian consumers about the importance of vitamins in maintaining good health. People recognize the role of vitamins in supporting the immune system, promoting good skin and hair health, and preventing nutritional deficiencies. India has faced challenges related to nutritional deficiencies in the past, with issues like vitamin D and vitamin B12 deficiencies being prevalent. This has driven the demand for vitamin supplements. Changing lifestyles, dietary preferences, and busy schedules have often resulted in imbalanced diets. Many consumers turn to vitamin supplements to bridge the nutritional gaps in their diets. Manufacturers have been fortifying foods and beverages with essential vitamins to make them more appealing to health-conscious consumers. This includes products like vitamin-fortified milk, cereals, and energy drinks. Healthcare professionals, including doctors and nutritionists, frequently recommend vitamin supplements to individuals with specific health concerns or deficiencies. Such recommendations boost the demand for vitamin products.

Application Insights

Based on application, food & beverages segment held the largest market share in 2024 and is predicted to continue expanding over the coming years. Indian consumers have been increasingly focusing on their health and wellness. They are looking for healthier food and beverage options that offer functional benefits, such as improved digestion, weight management, and overall well-being. This shift in consumer preferences has

driven the demand for health ingredients in food and beverages. Food and beverages are an integral part of daily life, making them convenient carriers for health ingredients. Consumers find it convenient to incorporate health-enhancing ingredients into their regular diet, as opposed to taking separate supplements or products. Manufacturers in the food and beverage industry have been actively developing functional foods and fortified products. These products are formulated with specific health ingredients like vitamins, minerals, probiotics, and herbal extracts, making them attractive to health-conscious consumers. The Indian government has introduced initiatives to promote the fortification of essential nutrients in staple foods, such as rice and wheat, to address widespread nutritional deficiencies. This has led to an increased use of health ingredients in food products. The food and beverage industry has invested in research and development to create innovative and appealing products that cater to various health needs. This includes the development of low-sugar, low-fat, high-protein, and gluten-free products, among others. Many food and beverage manufacturers have been transparent about the use of health ingredients in their products. This transparency in labelling and marketing has built consumer trust in the authenticity and efficacy of these products.

Regional Insights

The North India region dominated the India Health Ingredients Market in 2024. North India, particularly states like Uttarakhand and Himachal Pradesh, has a strong tradition of Ayurveda and herbal medicine. This heritage has contributed to the development and use of herbal health ingredients and products, making the region a hub for traditional health remedies. The Northern region of India is blessed with a diverse range of climatic conditions and geography, which facilitates the growth of various medicinal herbs and plants. This region's natural resources make it a favorable location for sourcing raw materials for health ingredients. North India, especially in and around cities like Delhi and Chandigarh, has a well-established pharmaceutical industry. This infrastructure supports the development, manufacturing, and distribution of health ingredients and nutraceutical products. The presence of prestigious research institutions and universities in the North also contributes to the development of health ingredients. These institutions often conduct research on traditional herbal remedies and modern health products.

Key Market Players

Sami-Sabinsa Group Limited

NutraSphere (Zanquest Ventures Pvt Ltd)

Arjuna Natural Pvt Ltd

Viridis Biopharma Pvt. Ltd

Vinayak Ingredients (India) Pvt. Ltd

Synergia Life Sciences Pvt. Ltd.

Bio-Med Ingredients Pvt Ltd.

SubNutra Food Ingredients Pvt. Ltd.

Phyto Life Sciences P. Ltd

Herbo Nutra Extract Private Limited

Report Scope:

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

India Health Ingredients Market, By Type:

Vitamins

Minerals

Prebiotics

Enzymes

Plant & Fruit Extracts

Probiotic Starter Cultures

Others

India Health Ingredients Market, By Application:

Food & Beverages

Personal Care

Animal Feed

Others

India Health Ingredients Market, By Source:

Synthetic

Plant

Animal

Others

India Health Ingredients Market, By Function:

Gut Health Management

Eye Health Management

Immunity Enhancement

Brain Health Management

Heart/Cardiovascular Health Management

Others

India Health Ingredients Market, By Region:

North India

South India

East India

West India

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India Health Ingredients Market.

Available Customizations:

India Health Ingredients Market report with the given market data, TechSci 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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