

Nutraceutical Excipients Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028F Segmented By Form (Liquid, Dry), By Functionality (Binders, Disintegrants, Flavoring Agents, Coating Agents, Fillers & Diluents, Lubricants, Other Functionalities), By End-Product (Protein & Amino Acids, Vitamins, Probiotics, Omega-3 fatty acids, Minerals, Other End Products), By Distribution Channel (Direct Tender, Retail Sales and Others), By Region, Competition

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Abstracts

The global market for nutraceutical excipients was valued at USD 4.32 billion in 2022 and is expected to exhibit robust growth in the forecast period, with a CAGR of 7.2% through 2028. Nutraceutical excipients encompass all components of a drug except for the active nutraceutical ingredients. These molecules do not possess inherent medicinal properties; their primary purpose is to enhance the physiological absorption of the drug. Nutraceutical excipients are inert in nature, allowing the drug molecule to be administered to patients in the appropriate form. In the past, nutraceutical excipients were simple molecules, but advancements in technology and the growing demand for novel drug delivery systems have led to an increase in the complexity of nutraceutical excipients. They play a crucial role in promoting patient acceptance of the drug and improving its stability and bioavailability.

The field of excipient science and technology has undergone significant changes and continues to evolve. Notable progress has been made in areas such as the

standardization of excipient monographs and the application of new analytical methods for more precise characterization of excipients.

Key Market Drivers

Increasing Application of Nutraceuticals

Nutraceuticals, derived from the combination of nutrition and pharmaceuticals, utilize nutraceutical excipients, also known as 'functional foods,' to enhance the efficacy of active ingredients in solutions. These excipients, prepared with Active Pharmaceutical Ingredients (API), are widely employed in standardized and pharmaceutical-grade supplements. The significant rise in medical costs has had a profound impact on the nutraceutical excipient market. Excipients, which are inert substances introduced during the manufacturing process or included in the dosage form of nutraceutical products, play a crucial role in adding bulk to solid formulations, ensuring long-term stability, and facilitating drug absorption. Moreover, they enhance the overall safety and functional properties of the product during use or storage. Due to their versatile applications, excipients have become well-known in the field. Consequently, the growing demand for excipients in the global nutraceutical excipient market is driven by the expanding utilization of nutraceuticals in the treatment of chronic diseases.

Technological Developments

Multifunctional excipients belong to a category of excipients that encompass pre-processed and co-processed variants, providing additional functionalities to formulations. These enhanced functionalities include aspects such as flowability, compressibility, particle size distribution, shape, and porosity, among others.

The recent surge in demand for specialty excipients, collectively known as multifunctional excipients, can be attributed to the growing interest in stringent manufacturing processes and the emphasis on alternative delivery systems. Nanotechnology-enabled drug delivery systems have gained significant prominence in addressing drug toxicity concerns. Two primary approaches are employed to utilize nanotechnology as a drug delivery system: reducing the size of nutraceutical drug crystals to enhance solubility and bioavailability, and utilizing some form of nano-carrier for effective delivery of active ingredients.

Increasing Demand for Nutraceutical Excipients

The rising interest in health and wellness, coupled with increasing awareness of preventive healthcare, has driven the demand for nutraceutical products. Nutraceutical excipients play a crucial role in formulating these products to deliver desired health benefits to consumers.

Nutraceutical excipients serve various functions, including improving product stability, enhancing bioavailability, providing taste masking, controlling release profiles, and ensuring content uniformity. This diverse range of functions makes them essential components in various nutraceutical formulations.

Innovation in Nanotechnology

The introduction of innovative excipient technologies has expanded the possibilities for nutraceutical product development. Novel excipients with enhanced functionalities, such as nanotechnology-based excipients, have opened new avenues for product formulation and differentiation. Nanotechnology-enabled drug delivery systems (NDDS) are employed to address the challenge of drug toxicity. Nutraceutical excipient manufacturers offer customized solutions and excipient blends tailored to meet the specific needs of different nutraceutical formulations. This flexibility allows formulators to create products optimized for target markets and consumer preferences. Ongoing research and development efforts in the nutraceutical industry have led to the development of novel formulations, including complex delivery systems and combination products. Nutraceutical excipients are crucial in enabling these advancements and improving the performance of such formulations.

Key Market Challenges:

Side Effects Associated with Nutraceutical Excipients

Most nutraceuticals contain excipients that serve various purposes. These excipients play a vital role in enhancing product performance, such as facilitating formulations, improving patient acceptance and compliance, or delivering more effective and safe drugs like modified-release formulations or taste-masked syrups for children.

It is important to note that nutraceutical excipients are not always inert substances as commonly assumed. They can cause intolerance in individuals or, if not carefully screened, lead to chemical changes in the drug, resulting in adverse effects. This aspect poses a challenge to the market and can impact the demand for such excipients.

High Cost of Research and Development (R&D) Investment

Excipients and nutraceutical products undergo extensive clinical and chemical development, necessitating significant R&D investments, clinical trials, and approvals from relevant authorities across different countries/regions. Moreover, the development of such products is a long-term endeavor encompassing formulation, trial and testing, and commercialization. However, substantial R&D investments do not always yield proportional productivity returns. Even after a successful molecule discovery, the costs associated with introducing a new nutraceutical product or excipient to the market are significantly high. Additionally, competing players in the market may develop alternative and cost-effective solutions, further complicating the trial and testing process and leading to wastage of time, money, and effort invested in advancing the later stages of product development. Consequently, the risk of failure remains considerable. Furthermore, the expense of conducting clinical trials to establish the effectiveness of an excipient is relatively high, posing a significant barrier to the market introduction of novel excipients.

Key Market Trends

Increasing Need for Different Delivery Methods and Dosage Forms

The development of new treatments or preventive supplements, such as nutraceuticals, for chronic diseases, along with increased access to medication through generic drug production and heightened research and development spending, plays a crucial role in boosting alternative routes. Furthermore, advancements in novel drug delivery systems (NDDS) and alternative dosage formulations and routes of administration are expected to drive the demand for new excipients and present opportunities for market growth.

Growing Demand for Plant-based Excipients

The increasing demand for plant-based and vegan products has extended to nutraceutical excipients as well. Manufacturers are exploring plant-based excipients as alternatives to traditional excipients derived from animal or synthetic sources.

As the nutraceutical industry continues to diversify, there is a growing need for excipient solutions tailored to specific product requirements. Customized excipients offer unique functionalities and allow manufacturers to differentiate their products in the market.

Segmental Insights:

Insights on Functionality:

The binder segment, depending on its functionality, holds a dominant position in the nutraceutical excipients market and is expected to have a significant impact. Binder excipients play a crucial role in maintaining the structural integrity of formulations, particularly in tablets. By effectively holding the constituents together, binders enable the production of tablets, powders, granules, and other products with the necessary mechanical strength.

Fillers and diluents also play a substantial role in the nutraceutical excipients market. A diluent acts as a substance that dilutes, addressing concerns related to the flow and pumpability of dense or viscous liquids. Fillers, on the other hand, enhance the volume of a product and aid in the absorption of active chemicals by consumers. By improving performance and adding volume or weight, fillers contribute to the cost-effectiveness of solid materials. The inclusion of fillers in supplements helps combine and stabilize the formulation.

End-Product Insights:

Probiotics are expected to be the fastest-growing segment in the forecast year. Probiotics, comprising yeast and beneficial bacteria, offer numerous advantages to consumers. These include improved digestion, enhanced gut health, strengthened immunity, increased nutrient absorption, and reduced risk of food allergies. Probiotic products are available in various forms, such as yogurt, drinks, tablets, and capsules. However, developing a commercially viable probiotic formulation poses two primary challenges. First, ensuring the quality of health attributes conferred by probiotic organisms. Second, maintaining formula stability throughout its shelf life.

Companies are actively engaged in the development and provision of probiotic blend products, including APIs (Active Pharmaceutical Ingredient), incorporating diverse excipients. Among these excipients, mannitol has been identified as the most suitable, effectively enhancing the shelf life of end-products. Notably, on September 13, 2022, Nestle's Garden of Life introduced two new probiotics targeting children's growth and immune health in China's offline retail market. Similarly, on June 1, 2022, Amway Korea launched a precision probiotics service that analyzes users' feces to provide tailored recommendations for improving their gut microbiome and increasing the production of beneficial short-chain fatty acids.

North America is projected to maintain its dominant position in the Nutraceutical Excipients Market in 2022. This can be attributed to the presence of major international companies such as DuPont (US), Kerry (Ireland), and Cargill (US) in the region. Moreover, the busy lifestyles of consumers, the prevalence of chronic diseases resulting from hectic lifestyles, and increasing consumer awareness of the health benefits of nutritional foods, including food supplements, have all contributed to the growth of the Nutraceutical Excipients Market in North America. Consequently, there has been a significant surge in the demand for functional food products.

Key Market Players

ABF Ingredients

Cargill, Inc.

Dow, Inc.

DuPont de Nemours, Inc.

EGGLE Wasserburg Verwaltungs GmbH

Hilmar Ingredients

IMCD Group BV

Ingredion, Inc.

Innophos Holdings, Inc.

Jrs Pharma GmbH Co. KG

Report Scope:

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

Nutraceutical Excipients Market, By Form:

Liquid

Dry

Nutraceutical Excipients Market, By Functionality:

Binders

o Disintegrants

Flavoring Agents

Coating Agents

Fillers & Diluents

Lubricants

Other Functionalities

Nutraceutical Excipients Market, By End Product:

Protein & Amino Acids

Vitamins

Probiotics

Omega-3 fatty acids

Minerals

Other End Products

Nutraceutical Excipients Market, By Distribution Channel:

Direct Tender

Retail Sales

Others

Nutraceutical Excipients Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

? Australia

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 Nutraceutical Excipients Market.

Available Customizations:

Global Nutraceutical Excipients 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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