

Personalized Nutrition Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028F Segmented By Product Type (Active Measurement, Standard Measurement), By Application (Standard Supplement, Disease Based), By Dosage Forms (Tablets, Capsule, Powders, Liquids, Others), By End User (Direct-To-Consumer, Wellness & Fitness Centers, Hospital & Clinics, Institutions), By Region and Competition

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Abstracts

Global Personalized Nutrition Market was valued at USD 12.5 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 16.4% through 2028. A personalized nutrition plan also referred to as a customized nourishment approach, is based on the concept of providing tailored nutrition guidance by nutritionists and other dietary experts. The aim is to make dietary changes that optimize and enhance our health and well-being while minimizing the risks of diseases such as obesity, heart disease, and type 2 diabetes. Personalized nutrition lies at the core of the practice of registered dietitians, who provide tailored nutrition advice that aligns with the physical, clinical, and emotional needs of their patients.

In recent times, personalized nutrition has become more comprehensive. It now involves a deeper assessment of an individual's genetics, dietary habits, physical activity, sleep patterns, microbiome, and even metabolic rates. Metabolic rates refer to the small molecules produced by the body that may have an impact on how an individual functions. The personalized nutrition industry encompasses various products, including vitamins, minerals, proteins, amino acids, herbs, botanicals, fibers, specialty

carbohydrates, fatty acids, probiotics, and others such as prebiotics, glucosamine, carotenoids, and more.

Key Market Drivers

Growing Consumer Health Awareness

A key driving force behind the burgeoning personalized nutrition market is the increasing demand for tailored nutritional guidance based on individual requirements. With the rise in obesity rates, as well as the prevalence of busy and unhealthy eating habits, personalized nutrition is poised to gain significant traction. This approach to dieting focuses on meeting specific nutritional needs of individuals while also providing insights into their metabolic history, environmental exposure, genetic profile, personal wellness objectives, and microbiome composition. The increasing awareness of the significance of maintaining a healthy lifestyle has contributed to the rapid market growth. The prevalence of chronic diseases, including diabetes and cardiovascular diseases, has prompted individuals to embrace personalized nutrition solutions. Furthermore, lifestyle changes, higher disposable incomes, and growing awareness of the benefits of nutrition plans are positively impacting the sparkling water market. The growing consumer preference for dietary improvements is a key driver for the expansion of the personalized nutrition market. The increasing trend of adopting a healthy lifestyle across all age groups, coupled with a shift towards innovative approaches, has a positive impact on the industry.

Increasing Prevalence of Customized Approaches for Nutrition

The increasing popularity of personalized nutrition guidance tailored to individual needs is a significant driver in the personalized nutrition market. With a growing number of individuals facing obesity and unhealthy dietary habits, personalized nutrition is expected to gain considerable traction. Personalized nutrition involves a diet that is specifically recommended to meet individual nutritional requirements. Additionally, personalized nutrition can provide a comprehensive understanding of an individual's metabolic history, environmental exposure, genetic profile, personal wellness goals, and microbiome composition. According to the American Nutrition Association, personalized nutrition is a field that unveils human individuality and facilitates the development of nutrition strategies for disease management, prevention, and the promotion of healthy lifestyles. Moreover, the demand for mindful food choices, healthy lifestyles, and preventive health measures in the food sector is driving the overall growth of the personalized nutrition industry. The surging demand for organic and natural food

products is the primary driver behind market growth and development. Organic food sets itself apart from conventionally and traditionally grown food by adhering to a natural system of agriculture, free from the use of synthetic pesticides and fertilizers. Natural food products are derived from organically produced raw materials. The increasing popularity of these products can be attributed to the growing awareness of the health benefits associated with organic food. According to the Organic Consumer Association, sales of organic food have experienced a yearly growth rate of 20 percent, and projections indicate that the industry's share of the U.S. food market is set to expand from approximately 2 percent to around 3.5 percent by the end of the decade. Simultaneously, emerging companies in the personalized nutrition industry are leading the market by innovating strategies for customers. For instance, in November 2019, Amway, a US-based multinational company, announced a USD 200 million investment in China for the establishment of an innovation center focused on dietary supplements. This innovation center aims to provide individuals with customized solutions for personalized nutrition. Such initiatives by market leaders are expected to further propel the growth of the market.

Prevalence of Obesity

In the current scenario, populations in developed and developing countries are increasingly seeking tailored approaches to address their health and well-being, aiming to achieve specific health goals within defined timeframes. Thanks to technological advancements, significant progress has been made in providing the necessary knowledge and information to effectively and efficiently create customized nutritional plans. Personalized nutrition plans, as an alternative to conventional health techniques, enable customers to adhere to strict dietary regimens. The market's growth and development are primarily driven by the global rise in health consciousness, fueled by increasing disposable income and the prevalence of health issues such as obesity. The rising prevalence of obesity has a significant impact on the market. Individuals seeking guidance from dietitians and nutritionists for personalized diet plans with the goal of weight loss contribute to market growth.

Growing Trend of Portable Health Monitoring Devices

There is a global concern regarding the selection of nutritious food and the pursuit of a healthy lifestyle. Portable healthcare technologies have emerged as a reliable means to accurately measure and assess the daily nutritional intake of individuals. Research indicates that approximately 30% of adults in the United States utilize portable healthcare devices. Personalized nutrition approaches are gaining popularity, facilitated

by easy access to personalized data such as metabolic profiles, biochemistry, and microbiome information. These devices recommend tailored nutritional solutions, aiding individuals in managing weight, blood sugar, and cholesterol and achieving optimal health. Furthermore, the increasing availability of DNA tests, at-home blood tests, and other health-related assessments is expected to drive the demand for personalized nutritional products. Improper nutrition and sedentary lifestyles have led to a rise in life-threatening chronic diseases such as clogged arteries. Research suggests that around 117 million adults in the United States suffer from such conditions due to improper nutrition and lack of exercise. Consequently, consumers are shifting their focus toward disease prevention and embracing a health-conscious mindset. The growing awareness of health and fitness programs is expected to drive the demand for personalized nutrition products in the foreseeable future.

Key Market Challenges

High Cost Associated with Personalized Nutrition Plan

Personalized nutrition services are associated with a significant cost, potentially rendering them inaccessible to a substantial portion of the population. This aspect is expected to impede the growth of the global market in the forecast period. Additionally, limited awareness regarding the benefits of personalized nutrition in health monitoring and treatment is foreseen as a factor that may hinder the market value of personalized nutrition in the coming years. The high cost of nutritional plans presents a significant challenge for the personalized nutrition market. Personalized nutrition plans often include various health and fitness monitoring charges, making the end product unaffordable for low-income consumers. Moreover, some nutrition plans may only be required for short-term treatments, yet certain personalized nutrition companies offer only annual treatment packages to maximize their Return on Investment (ROI). These unnecessary charges inflate the cost of the end product and could impede revenue growth in the market. Additionally, personalized nutritional plans rely on a wide range of unique physical, behavioral, and attitudinal data, which are processed by wearable health devices to recommend tailored plans. However, inaccurate data can be generated when these devices lack sufficient raw data, resulting in incorrect nutritional attributes. Furthermore, the personalized nutrition market remains fragmented as many personalized nutritional solution applications are still in the early stages of development and deployment. This challenge is expected to persist until a larger volume of user data is integrated into the system, potentially hindering revenue growth on a global scale.

Availability of Counterfeit Products

There remains a significant disparity in the alignment of eating and sleeping patterns in relation to genetics (and vice versa), as well as their interaction with individual behavior and environmental factors. The increasing complexity of diseases such as diabetes and obesity can be attributed to lifestyle-related changes. Numerous genetic pathways have been identified that may contribute to weight gain or difficulties in blood sugar control. Another notable constraint of personalized nutrition is its reliance on a comprehensive understanding of an individual's dietary intake, which plays a crucial role in determining the body's response to various nutrients and food products. Counterfeit foods pose a significant risk to public health and safety while also imposing substantial financial burdens on consumers. Additionally, counterfeiting undermines trust, confidence, and the brand identity of organizations. According to the Grocery Manufacturers Association (GMA) in the U.S., it is estimated that the global food and consumer products industry may suffer annual losses of approximately USD 12 to 15 billion due to counterfeiting. The detrimental effects of counterfeit food products can have far-reaching consequences on health, potentially leading to fatalities. Consequently, the presence of counterfeit products hinders future market growth and development.

Key Market Trends

Rising Trend of Health Monitoring Apps

Due to technological advancements, the growing trend of health monitoring apps presents significant opportunities for market growth. The increasing adoption of smartphones and tablets is a key driver behind the rise of health-monitoring apps. Nowadays, individuals who own smartphones can easily monitor their well-being and happiness. Additionally, patient-generated data is already playing an increasingly important role in health monitoring applications. People today seek to understand and gain insights from their own health data. The emergence of digital technology innovations has transformed patient-generated data into a valuable resource. Data from consumer health technologies, such as in-home medical devices, mHealth apps, and smart wearables, are fueling personalized and customized approaches to healthcare management.

Increasing Collaborations and Strategic Partnerships

Personalized nutrition is an emerging trend driven by consumer willingness to invest in tailored dietary solutions. Collaborative partnerships across sectors have become a prominent strategy for community health improvement. The traditional 'one-size-fits-all'

approach is losing relevance as consumers increasingly demand customized products.

Research and development initiatives in personalized nutrition rely on collaborative innovation and advanced technologies, such as data tracking and collection, to gather individual health data. This data accumulation enables the establishment of comprehensive health databases and standards. As a result, various stakeholders, including material suppliers, scientific research institutions, and medical establishments, collaborate to form personalized nutrition industry alliances, integrating research, production, and education.

Segmental Insights

Application Insights

The global market for personalized nutrition is categorized into standard supplement and disease-based segments based on applications. The application segment is dominated by the standard supplement segment, holding the largest market share. Standard supplements comprise at least one dietary ingredient, such as vitamins, minerals, herbs, botanicals, amino acids, or enzymes. Multivitamins are commonly used supplements that help reduce the need to take numerous pills daily. Prominent dietary supplements include calcium, fish oil, echinacea, ginseng, garlic, and vitamin D. Adequate nutrition plays a crucial role in the prevention of various chronic diseases, including heart disease and type 2 diabetes. Furthermore, it aids in strengthening the immune system, as essential vitamins and minerals are required for optimal immune function. A balanced and diverse diet ensures proper immune system functioning and offers protection against illnesses and immunodeficiency issues.

End User Insights

The direct-to-consumer segment is projected to be the largest end-user segment in the global personalized nutrition market in 2022. This growth is driven by shifting consumer preferences towards high-nutrient products that promote health and lifestyle improvements. The persistent concern over nutrient deficiencies has paved the way for personalized nutrition approaches, which provide effective methods and solutions for understanding and addressing these issues. Consequently, the direct-to-consumer segment is expected to maintain its leadership in the personalized nutrition market during the forecast period, driven by these factors.

Regional Insights

North America is projected to be the largest market for personalized nutrition in 2022. The region's growth is primarily driven by increasing consumer awareness of health and dietary patterns, as well as a significant rise in obesity rates. A busy lifestyle has prompted consumers to opt for customized dietary supplements that cater to their specific needs. Furthermore, the rising disposable income has empowered consumers to invest in personalized meal plans and related services.

In Europe, the personalized nutrition market is experiencing rapid growth. The increasing trend of personalized food choices to achieve a better diet, coupled with a growing awareness of healthy foods and the promotion of health and nutrition, are driving this growth. The gradual increase in the adoption of personalized approaches to health and wellness, which help individuals achieve specific goals within a specified timeframe, is also contributing to this growth. Personalized nutrition is an alternative approach that acknowledges individual differences and empowers consumers to take control of maintaining a healthier diet.

The Asia Pacific region is witnessing a growing market for personalized nutrition, driven by factors such as increasing consumer awareness of health, a better understanding of the importance of adequate health and fitness, and the rising adoption of digital healthcare solutions. Additionally, the market in this region is expected to register the fastest growth due to the rising acceptance of personalized nutrition solutions and proactive measures. Despite the challenges posed by the COVID-19 outbreak, the market has continued to grow as more consumers are prioritizing their immune systems and opting for nutritional products.

Key Market Players

BASF SE

DSM

Herbalife Nutrition Ltd

Metagenics, Inc.

DNAfit

Nutrigenomix Inc.

Atlas Biomed Group Limited

Habit, LLC

Bactolac Pharmaceutical

Balchem Corporation

Report Scope:

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

Personalized Nutrition Market, By Product Type:

Active Measurement

Standard Measurement

Personalized Nutrition Market, By Application:

Standard Supplement

Disease Based

Personalized Nutrition Market, By Dosage Forms:

Tablets

Capsule

Powders

Liquids

Others

Personalized Nutrition Market, By End User:

Direct-To-Consumer

Wellness & Fitness Centres

Hospital & Clinics

Institutions

Personalized Nutrition 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

Kuwait

Turkey

Egypt

Competitive Landscape

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

Available Customizations:

Global Personalized Nutrition 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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