

Softgel Capsules Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029

Segmented By Type (Gelatin-Based/Animal-Based, Non-Animal-Based), By Application (Antacid and Anti-Flatulent Preparation, Anti-Anemic Preparations, Anti-Inflammatory Drugs, Antibiotic and Antibacterial Drugs, Cough and Cold Preparations, Health Supplement, Vitamin and Dietary Supplement, Pregnancy, Others), End Use (Pharmaceutical Companies, Nutraceutical Companies, Cosmeceutical Companies, Contract Manufacturing Organization), By Region, and By Competition

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Abstracts

Global Softgel Capsules Market was valued at USD 7.63 billion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.65% through 2029. Softgel capsules provide numerous benefits in the field of pharmaceuticals. They offer advantages such as easy ingestion, effective concealment of odors and tastes, increased absorption, improved bioavailability, and impressive stability in various environmental conditions. As manufacturing technology continues to advance and new materials are introduced, conventional capsules have undergone a transformation, now offering additional functionalities such as controlled drug release, tamper-evident features, and expanded possibilities for potent API formulations. These developments are spurred by a decrease in degradation within the stomach's acidic environment, aesthetically pleasing appearances, and extended shelf life, thereby

expanding the array of options available for pharmaceutical formulations.

Key Market Drivers

Enhanced Bioavailability and Absorption

The global softgel capsules market is undergoing a remarkable transformation, thanks to a multitude of factors that contribute to its expansion. Among these factors, one of the most pivotal drivers is the promise of enhanced bioavailability and absorption. Softgel capsules, due to their unique characteristics and versatility, have become the preferred choice for delivering a wide range of pharmaceutical and nutraceutical products.

Bioavailability refers to the proportion of an active ingredient that enters the bloodstream when introduced into the body, typically through ingestion, compared to the amount administered. High bioavailability means a more significant portion of the substance is available for the body to use, which is crucial for the effectiveness of pharmaceuticals and dietary supplements. Absorption, on the other hand, is the process by which the active ingredient is taken up and distributed within the body after entering the bloodstream. In many cases, poor absorption can significantly reduce the therapeutic efficacy of a drug or supplement.

Softgel capsules are unique in their ability to encapsulate both hydrophilic (water-soluble) and lipophilic (fat-soluble) compounds. This versatility allows for the efficient delivery of a broader range of active ingredients. Pharmaceutical formulations, including those with poorly water-soluble compounds, can achieve better bioavailability with softgel capsules. Softgel capsules often contain liquid or semi-liquid formulations. This liquid core can enhance the solubility of poorly soluble compounds, ensuring better absorption in the gastrointestinal tract. Softgel capsules provide protection for the encapsulated ingredients, shielding them from environmental factors like oxygen and moisture. This preservation ensures that the active compounds remain stable until they are released in the body, which can be critical for maintaining bioavailability.

Pharmaceuticals, particularly those with complex and poorly water-soluble compounds, are increasingly turning to softgel capsules to maximize the bioavailability of their products. This trend is boosting the demand for softgel capsules in the pharmaceutical sector. As consumers become more discerning about the efficacy of dietary supplements, softgel capsules are gaining popularity among nutraceutical companies. The promise of better absorption attracts both manufacturers and consumers. Softgel capsules allow for the customization of drug release profiles. This means that

pharmaceutical companies can tailor the release of active ingredients to optimize bioavailability, further propelling the growth of the softgel capsules market.

Improved Patient Compliance

The global softgel capsules market is experiencing a robust upswing, and one of the key accelerators behind this surge is the promise of improved patient compliance. Softgel capsules, known for their ease of use and comfort, are emerging as a preferred drug delivery system that not only enhances the pharmaceutical and nutraceutical sectors but also ensures patients adhere to their treatment regimens.

Patient compliance, or adherence, refers to the extent to which a patient follows the prescribed medical treatment or medication regimen. It is a critical factor in achieving successful health outcomes and therapeutic efficacy. Factors that can affect patient compliance include the complexity of the treatment regimen, side effects, and the form of medication delivery.

The most distinctive feature of softgel capsules is their ease of swallowing. The gelatin-based shell is smooth and soft, making them more palatable and easier to ingest. This is particularly beneficial for patients who have difficulty swallowing traditional tablets or hard-shell capsules, such as children, the elderly, and those with certain medical conditions. "Pill fatigue" refers to the reluctance of patients to take multiple pills daily due to their size, taste, or form. Softgel capsules offer a comfortable and convenient alternative, reducing this psychological barrier to compliance. Softgel capsules effectively mask the unpleasant tastes and odors of certain medications or supplements. This plays a pivotal role in ensuring that patients adhere to their treatment regimens, as they are less likely to encounter taste aversion or nausea.

Softgel capsules are increasingly being used in pediatric and geriatric medicine due to their ease of administration. This has opened up new market segments and opportunities for pharmaceutical manufacturers. In the nutraceutical industry, where compliance with daily supplement regimens is paramount, softgel capsules are gaining traction. They appeal to consumers seeking to maintain better health through consistent supplement intake. Softgel capsules enhance the acceptability of pharmaceutical products, particularly those with a reputation for poor taste or size. Patients are more likely to continue their treatment when it involves user-friendly delivery systems like softgel capsules. When patients comply with their prescribed regimens, they are more likely to experience improved therapeutic outcomes. This benefits both patients and healthcare providers and fosters trust in the efficacy of softgel-encapsulated drugs and

supplements.

Odor and Taste Masking

The global softgel capsules market is experiencing substantial growth, and a significant driving force behind this expansion is the remarkable capability of softgel capsules to mask undesirable tastes and odors. In the pharmaceutical and nutraceutical industries, product palatability plays a crucial role in patient and consumer acceptance. Softgel capsules have emerged as a versatile solution that not only protects sensitive ingredients but also offers a pleasant experience for users.

Softgel capsules are particularly adept at encapsulating both hydrophilic (water-soluble) and lipophilic (fat-soluble) compounds. This feature allows manufacturers to mask the taste and odor of active ingredients by enclosing them within a sealed, often flavored, gelatin shell. The external shell ensures that the sensitive ingredients are not exposed to the palate or olfactory senses. Manufacturers can add pleasant flavors to the liquid or semi-liquid fillings within softgel capsules. This customization not only helps mask unappealing tastes but also makes the medication or supplement more enjoyable to consume. Flavor options can range from fruity and sweet to minty or herbal, catering to a variety of preferences. Softgel capsules provide an additional barrier between the enclosed ingredients and external environmental factors, including oxygen and moisture. This protection further safeguards the integrity of the product, preventing potential degradation that could affect taste and odor.

Softgel capsules enhance the overall patient experience, making it more likely for patients to adhere to their prescribed medication regimens. This is especially crucial in the pharmaceutical industry, as patient compliance directly impacts the effectiveness of treatment. In the nutraceutical sector, where consumer acceptance is vital, softgel capsules provide a means to deliver supplements without the unpleasant aftertaste often associated with vitamins and minerals. Softgel capsules are gaining popularity among diverse demographics, including children, the elderly, and individuals with sensitivities to taste and odor. This expanding user base is opening new market segments for pharmaceutical and nutraceutical companies. The ability to offer a pleasant sensory experience can strengthen brand loyalty and trust in product efficacy. Consumers are more likely to repurchase products that are both effective and enjoyable to use.

Extended Shelf Life

The global softgel capsules market is experiencing rapid growth, and one of the key factors contributing to this expansion is the promise of extended shelf life. In an era of heightened consumer awareness and a focus on product efficacy, softgel capsules have emerged as a leading solution to protect the integrity of pharmaceutical and nutraceutical products.

Longer shelf life instills confidence in consumers that the product they purchase will remain effective until the expiration date. This trust is a critical factor for both pharmaceutical and nutraceutical products. Products with longer shelf lives are less likely to expire before consumption, reducing waste for both consumers and manufacturers. Extended shelf life enables products to reach a broader geographic market, as they can be stored for longer periods without deterioration.

Softgel capsules create a protective barrier between the product contents and external elements, such as oxygen, moisture, and light. This barrier ensures that the ingredients inside the capsules remain stable and potent throughout their designated shelf life. The gelatin shell of softgel capsules helps maintain the stability of the encapsulated ingredients. This is particularly important for sensitive compounds, including vitamins, minerals, and certain medications, which can degrade when exposed to environmental factors. Softgel capsules are highly effective in minimizing oxidation of ingredients susceptible to oxidative damage. Oxidation can result in loss of potency and spoilage, which extended shelf life effectively combats.

Products housed in softgel capsules inspire trust among consumers, who are more likely to purchase items with the assurance of longer shelf life. This is particularly vital for dietary supplements and over-the-counter medications. Products housed in softgel capsules inspire trust among consumers, who are more likely to purchase items with the assurance of longer shelf life. This is particularly vital for dietary supplements and over-the-counter medications. Products with longer shelf lives are less likely to expire before use, resulting in fewer returns for manufacturers and retailers. This reduction in waste benefits the entire supply chain. The ability to deliver products with extended shelf life enhances brand reputation and customer loyalty. Consumers are more likely to stick with brands that consistently provide fresh, potent products.

Key Market Challenges

Cost-Intensive Manufacturing

Softgel capsules production involves multiple steps, including gelatin and shell

formation, filling, sealing, and quality control. The entire process can be resource-intensive, leading to higher production costs. This can be a challenge for manufacturers aiming to maintain competitive pricing while ensuring profitability.

Competition and Market Saturation

The softgel capsules market is becoming increasingly competitive as more manufacturers enter the arena. This heightened competition can lead to market saturation and make it challenging for both established and new companies to differentiate themselves.

Supply Chain Disruptions

Global supply chains are vulnerable to various disruptions, including pandemics, natural disasters, and geopolitical tensions. These can impact the timely acquisition of raw materials and components, affecting production schedules.

Key Market Trends

Personalized Medicine and Customized Formulations

As the demand for personalized medicine grows, softgel capsules are expected to play a pivotal role in this trend. Pharmaceutical companies are exploring ways to tailor drug formulations to individual patient needs. Softgel capsules, with their ability to encapsulate a wide range of compounds, including hydrophilic and lipophilic substances, offer an ideal platform for customized medications. This trend can lead to more precise and effective treatments for various medical conditions.

Advanced Drug Delivery Systems

The evolution of softgel capsules as drug delivery systems is set to continue. Innovations in the design and manufacturing of softgel capsules are enabling controlled-release formulations. This means that the release of active ingredients can be regulated, providing a steady, prolonged release of the drug in the body. Controlled release softgel capsules are particularly beneficial for medications that require a sustained therapeutic effect, such as pain management or hormone replacement therapy.

Vegan and Plant-Based Options

The rise of veganism and the growing demand for plant-based products are influencing the softgel capsules market. Manufacturers are developing vegan and plant-based alternatives to traditional gelatin-based softgel capsules. These plant-based capsules are gaining popularity among environmentally conscious consumers who seek sustainable and cruelty-free options. Plant-based softgel capsules are typically made from materials like agar or carrageenan.

Segmental Insights

Type Insights

Based on the category of Type, the gelatin-based or animal-based category emerged as the dominant force in the market in 2023, boasting the largest share of revenue. Gelatin has been the preferred choice for manufacturers for over 80 years, owing to its numerous advantages over alternative excipients. Its exceptional attributes, including easy digestibility, efficient production of tamper-proof capsules, superior durability, high-quality seals, patient compliance, abundant availability as a resource, and its inert, clean-label nature, have all played a pivotal role in its widespread acceptance within the market. These factors have solidified gelatin's status as the excipient of choice for pharmaceutical formulations.

In contemporary times, manufacturers are exploring capsules that combine bovine and porcine gelatin due to their distinctive properties. Bovine-derived gelatin contributes to enhanced capsule firmness, while porcine-derived gelatin imparts desirable qualities like plasticity and clarity to the formulation.

Despite the numerous advantages of gelatin-based capsules, the non-animal-based capsule sector is expected to experience significant growth at an attractive CAGR during the forecast period. There is a growing preference for vegan medication options, especially in the wake of the COVID-19 pandemic, which has led to increased adoption of such capsules by vegetarian consumers. Furthermore, the extensive research efforts undertaken by leading companies are likely to further boost market growth.

Application Insights

Based on Application, the vitamins and dietary supplements category emerged as the dominant force in the market in 2023, securing the largest share of revenue. Vitamins, when formulated as tablets or gummies, are susceptible to atmospheric oxidation and

degradation. Therefore, the optimal choice for formulation is softgel capsules, as they provide protection against UV radiation and oxidation, ultimately extending their shelf life.

Research indicates that vitamins, when administered in the form of softgel capsules, are absorbed more rapidly into the bloodstream compared to tablet formulations. Thanks to these advantages, vitamins are predominantly marketed in softgel capsule form, solidifying their significant presence in the application segment. The outbreak of the COVID-19 pandemic resulted in countries like the United States and India experiencing an approximately 89% increase in the sales of Vitamin C and D supplements compared to 2019 figures.

In the softgel capsules market, the health supplements sector also claimed a noteworthy share of revenue in 2023. This growth was facilitated by the increased adoption of a healthy lifestyle by the general population in response to the COVID-19 pandemic. The widespread acceptance of pre- and post-natal softgel capsules, combined with a preference for tasteless medication, contributed significantly to the surge in softgel capsule sales, further enhancing market expansion.

Regional Insights

North America asserted its dominance in the market by securing the largest share of revenue in 2023. This achievement can be attributed to advancements in production technology, the strong presence of key industry players in the region, and increased investments in research and development aimed at expanding their product offerings. Furthermore, the presence of health-conscious consumers and industry leaders in the region played a pivotal role in driving robust market growth.

On the other hand, Asia Pacific is anticipated to achieve the most rapid CAGR during the forecast period. This impressive growth can be attributed to several key factors, including the significant presence of generic medicine manufacturers in China and India, a rising demand for cost-effective therapeutics, rapid improvements in economic conditions, and the emergence of contract manufacturing organizations within the region. Additionally, the increased expenditure on personalized medicine and the adoption of advanced processing techniques to enhance softgel production are poised to further propel the advancement of the regional market.

Key Market Players

Fuji Capsule Co Ltd

Sirio Pharma Co Ltd

Captek Softgel International Inc

Thermo Fisher Scientific Inc

EyePoint Pharmaceuticals Inc

Catalent Inc

EuroCaps Ltd

Aenova Group GmbH

Lonza Group AG

Soft Gel Technologies Inc

Report Scope:

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

Softgel Capsules Market, By Type:

Gelatin-Based/Animal-Based

Non-Animal-Based

Softgel Capsules Market, By Application:

Antacid and Anti-Flatulent Preparation

Anti-Anemic Preparations

Anti-Inflammatory Drugs

Antibiotic and Antibacterial Drugs

Cough and Cold Preparations

Health Supplement

Vitamin and Dietary Supplement

Pregnancy

Others

Softgel Capsules Market, By End Use:

Pharmaceutical Companies

Nutraceutical Companies

Cosmeceutical Companies

Contract Manufacturing Organization

Softgel Capsules Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Competitive Landscape

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

Available Customizations:

Global Softgel Capsules 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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