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Express Nutra to surf the *sangam* of science and wellness trends



Be it wellness supplements to critical onco-nutritional formulations, market trends and business strategies, regulatory updates, leadership insights, and showcasing technology and innovation, *Express Nutra* aims to be the voice of this dynamic industry

VIVEKA ROYCHOWDHURY
Editor

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‘Let food be thy medicine and medicine be thy food’, is a quote frequently attributed to Hippocrates, the father of modern medicine. Centuries later, nutraceuticals, a word coined by joining "nutrition" and "pharmaceutical", best reflects this Hippocratic message.

Nutraceuticals took centre stage during the COVID lockdowns, when the world turned to preventive health, to ward off the virus. The transition from health-seeking to wellness-seeking is here to stay, reflected in the increased sales of ‘wellness’ products like immunity enhancing formulations. With a plethora of product launches and more companies joining the fray, industry estimates predict that India’s nutra market will grow from \$4 billion in 2020 to \$18 billion by 2025, with a CAGR of 13.6 per cent expected from 2025 to 2030.

Having covered the evolution of the pharma sector since December 1994, *Express Pharma* launches *Express Nutra* in February 2025, to provide a neutral platform to all stakeholders, regulators and policymakers, established pharma and FMCG companies diversifying with a nutra play, pure play nutra organisations and startups either re-packaging ancient nutrients into contemporary avatars or launching *desi* versions of global trendsetters.

Partnering with multiple stakeholders, *Express Nutra* will surf the *sangam* of science, shifting demographics, consumer-driven health trends, and a lot more. Starting off as we mean to go on, in our inaugural edition, our lead story attempts to crack the regulatory code for nutra.

In India, we have the Food Safety and Standards (Health Supplements, Nutraceuticals, Food for Special Dietary Use, Food for Special Medical Purpose, and Prebiotic and Probiotic Food) Regulations, 2022. The regulation covers five categories of food : Health Supplements, Nutraceuticals, Food for Special Dietary Use (FSDU) and Foods for Special Medical Purpose (FSMP), Prebiotic Food and Probiotics Food.

With medicine watchdog CDSCO stepping into the fray and tightening scrutiny, the industry is divided on the pros and cons. Our story, ‘Balancing safety and business in India’s nutra market’, has all the details.

Will increasing regulatory scrutiny cool the jets of investors funding startups and M&As in the nutra sector? Not likely, says Subhakanta Bal, MD, Rothschild & Co. Read his interview explaining why the nutra sector expects to see continued investments and acquisitions.

Also get a glimpse of how nutra players are taking lessons from pharma’s supply chain COVID meltdown to ensure their vendor and ingredient sourcing networks, etc are more resilient and shock-resistant.

Express Nutra is set to be launched at two of India’s biggest nutra-focused conferences, Vitafoods India 2025 (Feb 5-7, 2025) and the annual conference of the Health Food and Dietary Supplements Association (HADSA) (March 21, 2025). Both conferences will turbo charge India’s nutra sector, with a focus on science-based strategies to meet India’s and the world’s unmet nutra needs.

Be it wellness supplements and critical onco-nutritional formulations, market trends and business strategies, regulatory updates, leadership insights, and showcasing technology and innovation, *Express Nutra* aims to be the voice of this dynamic industry.

We look forward to feedback and suggestions on how we can become the go-to resource for nutra business leaders, bridging gaps, connecting stakeholders and fostering collaboration for sustainable growth.

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Fuelling the future of nutrition: Vitafoods India 2025

Over 8,000 visitors are expected at Vitafoods India 2025, highlighting the event's growing role as a key networking hub



India's nutraceutical industry is undergoing a transformative era, driven by increasing health consciousness and a shift towards innovative, sustainable solutions. This rapidly evolving sector, valued at \$4 billion in 2020, has grown to \$18 billion by 2025 and continues expanding at a CAGR of 13.6 per cent from 2025 to 2030. With over 28 million new consumers embracing nutraceuticals between 2019 and 2023, the industry is gaining momentum and reshaping the health landscape in India.

In its third edition, Vitafoods India hosts over 136 domestic and 23 international exhibitors, attracting more than 8,000 visitors and featuring 19+ educational sessions led by 35 expert speakers

Against this dynamic backdrop, Vitafoods India 2025, organised by Informa Markets in India, is playing a pivotal role in propelling the sector's growth. Taking place from February 5-7, 2025, at Pavilion 1-2, Jio World Convention Center, Mumbai, the event is a key industry gathering.

As part of the globally recognised Vitafoods brand with over two decades of uniting the nutraceutical industry in Europe and Asia, Vitafoods India has gained prominence in the post-pandemic era of significant growth. The event

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serves as a vital platform for innovation, collaboration, and business expansion, offering unmatched opportunities for professionals across ingredients, finished products, contract manufacturing, private labelling, and equipment to connect and excel in this thriving market.

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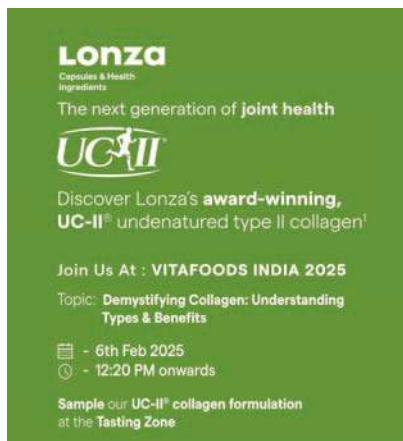
The 2025 edition builds on its impressive trajectory, following a remarkable 94 per cent growth in attendance at the 2024 event since its Indian debut in 2023. This year, it delivers an immersive three-day experience encompassing the entire nutraceutical supply chain under one roof.

In its third edition, Vitafoods India hosts over 136 domestic and 23 international exhibitors, attracting more than 8,000 visitors and featuring 19+ educational sessions led by 35 expert speakers. These sessions address critical topics such as regulatory frameworks, personalised nutrition, and sustainability, offering invaluable insights for stakeholders.

Supported by esteemed associations like AHNMI, AFSTI (India's Mumbai Chapter), CASMB, GCCI, HADSA, SHEFEXIL, and WIN, the event highlights the collective effort of the nutraceutical community. Vitamin Angels India, as the official Cause Partner for Vitafoods India 2025, furthers its mission to combat childhood malnutrition, while title partner KSM-66® Ashwagandha, in its third consecutive year at the event, reaffirms its trust in the Vitafoods brand. Key exhibitors include Inhalation Health, Akums Drugs and Pharmaceuticals, Bio-gen Extracts, Arjuna Natural, and OmniActive Health Technologies, among others.

Innovations and insights

Vitafoods India 2025 offers engaging features fostering innovation and collaboration. The Sustainability Webinar explores eco-conscious practices, while on-site visitors can explore the Innovation Zone, Global Trends Zone, and Tasting Zone. Day 1 highlights India's



The event serves as a vital platform for innovation, collaboration, and business expansion, offering unmatched opportunities for professionals across ingredients, finished products, contract manufacturing, private labelling, and equipment to connect and excel in this thriving market

nutraceutical market trends, regulatory frameworks, and advancements in ingredients like KSM-66 Ashwagandha and Magtein. Day 2 delves into nutricosmetics, collagen, and Omega-3 trends, ending with discussions on healthy aging. The Women in Nutraceuticals (WIN) Discussion emphasises diversity's role in innovation. Day 3 focuses on career opportunities and CASMB Talks, ensuring a holistic experience for all participants. This event is essential for industry professionals.

Leaders speak

Reflecting on the industry's growth, Yogesh Mudras, MD, Informa Markets in India, remarks, "The nutraceutical sector is witnessing remarkable growth, fuelled by shifting consumer preferences and increasing health consciousness. In

India, the percentage of regular nutraceutical users rose from 37 per cent in 2019 to 39 per cent by 2023, adding millions of consumers to this burgeoning market. Prioritising quality, safety, and accurate labelling has become essential, and Vitafoods India is instrumental in shaping the sector by highlighting innovation and advancing key trends."

Further emphasising the event's significance, Nilesh Lele, President, CASMB, shares, "With a CAGR of 11.3 per cent, India's nutraceutical industry is evolving into a global powerhouse. Vitafoods India has been a catalyst for connecting professionals, fostering meaningful exchanges, and unlocking business opportunities."

Dr Debjani Roy, ED, SHEFEXIL, echoes this sentiment: "Indian nutraceuticals, renowned for their stringent quality controls and export potential, are ready to compete with global leaders. Vitafoods India is the ideal platform to showcase our capabilities, strengthen collaborations, and drive discussions on food safety and functional foods."

Driving forces behind the growth of the nutraceuticals industry

In 2023, India's nutraceutical industry contributed 9.22 per cent to global revenue, reflecting its rising prominence. Growth is driven by concerns over cardiovascular health, obesity, and a shift to personalised nutrition, including DNA-based dietary solutions. As demand for functional foods and beverages with probiotics, herbal extracts, and immunity-boosting ingredients grows, Vitafoods India 2025 stands as the key platform for innovation. Companies are investing in R&D, sustainability, and e-commerce to stay competitive. Vitafoods India 2025 connects stakeholders, showcasing advancements and fostering collaborations that empower businesses to thrive. This event is more than a platform; it's a movement driving the future of India's nutraceutical industry.

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Health Foods & Dietary Supplements Association to host annual conference in Mumbai

The conference is expected to be attended by business owners, regulators, ingredient suppliers and senior management professionals in R&D, product development, contract manufacturers, nutrition professionals, sales, marketing, branding and startups in the nutra industry



Ajit Singh



Hitesh Patel



Dr Nikhil Kelkar

Health Foods & Dietary Supplements Association will host its annual conference centered on theme “*Nutraceuticals Unleashed: Innovating Holistic Health through Science and Market Insights*”. The conference is organised in the city of Mumbai at Hotel Holiday Inn, Andheri East, Mumbai on March 21, 2025.

The conference is chaired by Hitesh Patel, Managing Committee member of HADSA and MD, K Patel Phyto Extracts. Patel is ably supported by committed team of members from association representing various segments of nutra industry and guided by Ajit Singh, President, HADSA and Chairman, ACG. The team has curated the most value-added programme benefitting nutra professionals.

The conference will have presence of senior government officials. The key note address giving insights on market trends and nutra market scope will be delivered by

Dr Nikhil Kelkar, Hon Treasurer, HADSA and Joint MD, Hexagon Nutrition. There is highly interactive panel discussion planned on regulatory updates wherein experts from regulatory affairs will deliber-

ate on number of current topics concerning nutra sector. An interactive CEO roundtable will be moderated Ajit Singh, President, HADSA and Chairman, ACG which will provide directives for the growth of nutra sector.

This conference will cover wide ranging topics like:

- ◆ Key industry trends in nutraceuticals global/domestic market scope
- ◆ Interface between ayurveda and modern science in nutra
- ◆ Trends, challenges and opportunities in herbal supplements
- ◆ The importance of gut health: opportunities and scope
- ◆ Importance of scientific data based on clinical trials
- ◆ Driving business growth with artificial intelligence
- ◆ Emerging business potential for hair and cosma nutra products
- ◆ Leveraging social media marketing in the nutra industry

The conference is expected to be attended by business owners, regulators, ingredient suppliers and senior management professionals in R&D, product development, contract manufacturers, nutrition

professionals, sales, marketing, branding and startups in the nutra industry.

The conference will provide an excellent platform of learning and networking opportunities with key decision makers from nutra industry.

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Follow HADSA on LinkedIn for updates, sneak peeks, and insights into the conference.

Our inaugural edition explores the latest trends, regulations, key growth drivers, and strategic insights from industry leaders. It sets the stage for a journey into the ever-evolving world of nutraceuticals

CRACKING THE NUTRA CODE



Balancing safety and business in India's nutra market

The intent is clear: prevent interference and ensure quality. But is the cost justified? This is the crux of the debate sparked by the revised Schedule M mandate which bans nutraceuticals in drug-licensed facilities. While it impacts pharma players, it may benefit standalone nutra companies by leveling the field. The Karnataka High Court's temporary stay gives manufacturers time to pause and reflect

By Neha Aathavale

In striking the right balance between safety and business, India's nutraceutical industry stands at a piv-

Pharmaceutical Manufacturers Association (KDPMA), Federation of Pharma Enterprises (FoPE) and The Council of Softgel Manufacturers Association Interest challenged Schedule M. They

Setting the context

In a broader context, the Indian government has already taken steps to explore how nutraceuticals should be regulated within the existing framework for pharma



Amit Srivastava, Founder and Chief Catalyst, NutifyToday



Sanjaya Mariwala, Executive Chairman and Managing Director, OmniActive Health Technologies



Dr Vaibhav Kulkarni, Founder and Director, Zantus Lifesciences

otal crossroads. The recent revision to Schedule M bans the production of nutraceuticals in drug-licensed facilities to prevent cross-contamination. And, this has sparked a fiery debate. While it impacts pharma players, it may benefit standalone nutra companies by leveling the playing field. The Karnataka High Court's temporary reprieve allows manufacturers to pause and reflect—for now.

This pause came after a significant pushback from industry associations like the Karnataka Drugs and

argued that the regulation would disproportionately burden smaller manufacturers, forcing costly infrastructure changes without clear evidence of safety benefits. The government had previously signaled it would act against facilities producing nutraceuticals, supplements, and drugs under one roof. Now, with enforcement on hold, manufacturers have a chance to present their case. At the heart of the issue lies a critical question: Can India find a middle ground that satisfies both sides?

and food products. In February 2024, the government constituted a panel to consider bringing nutraceuticals under the purview of the Central Drugs Standard Control Organisation (CDSCO), instead of the Food Safety and Standards Authority of India (FSSAI), which currently governs the sector. This move was prompted by concerns over the regulatory challenges posed by the interchangeable use of certain ingredients and nutrients at different doses for pharma and nutra purposes. The panel, which includes members from

various ministries and regulatory bodies, will explore multiple issues, including the feasibility of enforcing price controls on certain nutra categories, the introduction of Good Manufacturing Practice (GMP) provisions for nutraceuticals, and the potential certification of these products in alignment with Schedule M for pharmaceuticals. As the panel continues its work, the industry remains in limbo, awaiting clarity on how best to navigate these regulatory challenges.

Decoding the mandate

As these deliberations progress, the government's potential move in the revised Schedule M to segregate pharma and nutra manufacturing marks a critical step towards stricter regulations, directly

ensure product integrity. However, it comes with significant challenges such as increased costs, potential supply chain disruptions, and reduced exports."

Mariwala further suggests that high-standard pharma plants, which meet rigorous benchmarks, should be permitted to produce nutraceuticals, but the reverse should not apply due to stricter drug requirements. "Collaboration between regulators and manufacturers is essential to address industry concerns and ensure practicality," he further suggests.

Looking through a regulatory perspective, Amit Srivastava, Founder and Chief Catalyst, NutifyToday, notes that the amendments represent a regulatory shift addressing quality and safety. "By prohibiting shared manufacturing, the

products and boost export potential. Differentiating the two industries also strengthens trust and prevents misuse of regulatory gaps, ultimately enhancing market credibility.

On the other hand, Dr Vaibhav Kulkarni, Founder and Director, Zantus Lifesciences and Honorary Secretary of the Health and Dietary Supplements Association (HADSA), presents a different perspective. "If the manufacturing facility is approved for pharmaceuticals, the said facility is indeed mandated as compliant with Schedule M. This means the facility has adequate cleaning validation procedures and prevention of cross-contamination processes. This implies that there is no risk for manufacturing a drug with a Dietary/ Food Supplement or a



Arvind Sharma, Partner, Shardul Amarchand Mangaldas & Co



Prasad Nakashe, Partner, Deloitte India



Sudesh Anand Shetty, Partner in Forensic Investigations, KPMG in India

influencing the operational landscape for manufacturers. The move, though aimed at improving quality assurance, presents challenges such as increased compliance costs and potential supply chain disruptions. Sparking significant industry discussions.

Sanjaya Mariwala, Executive Chairman and MD, OmniActive Health Technologies, and President, Association of Herbal and Nutraceutical Manufacturers of India (HADSA) welcomes the move, "Segregating production lines to meet stricter quality standards is a commendable move to

government is enforcing clearer boundaries between pharmaceutical and nutraceutical production, reducing risks of cross-contamination, and ensuring product integrity." Srivastava explains.

He explains that segregating manufacturing lines would ensure adherence to the distinct regulatory and production standards for nutraceuticals and pharmaceuticals. Dedicated facilities are necessary to minimise contamination risks, safeguarding consumer health. Additionally, aligning with international norms would enhance the global acceptance of Indian

Nutraceutical. All global regulators such as US FDA, EU, MCC, MHRA, TGA permits manufacturing of Drugs and Food Supplements/ Nutraceuticals in the same facility. Hence, basis the explanation, I feel shared manufacturing can be evaluated and allowed." Dr Kulkarni states.

He questions the rationale behind the amendment, adding, "In case of revised Schedule M Rules, 2023, insertion of 'Note' pertaining to discontinuation of dual use of manufacturing premises for producing drugs and nutraceuticals has no basis defined or explained. Looks like a suo moto

decision. This goes against the philosophy of collaborative working between government and industry to build the pharmaceutical and nutraceutical business in India.”

Pause and reflect

However, the Karnataka High Court's decision to grant a temporary stay has divided the industry. Experts differ on its impact on the industry as well.

Prasad Nakashe, Partner, Deloitte India, comments on the potential implications of the stay on the broader reform agenda. “The stay may temporarily slow down the momentum of regulatory reforms in the nutraceutical sector by creating uncertainty and delaying implementation. However, it is unlikely to halt the overall trend toward stricter regulations. As mentioned, it could prompt further discussions and refinements, leading to more balanced amendments.”

On the other hand, Mariwala calls for a single-window regulatory framework to streamline compliance processes. “While the amendments might slow the regulatory reform process for some time as the industry adjusts to the changes, they spell out a need for a single-window regulation framework. Strengthening of FSSAI's role as a single-window regulator will help streamline compliance-related issues, reduce redundancies, and create an innovation-friendly framework. The focus should remain on protecting consumers while enabling credible players to thrive,” Mariwala states.

Looking at the big picture, Arvind Sharma, Partner, Shardul Amarchand Mangaldas & Co, highlights broader conversations about regulatory reforms in the nutraceutical sector. “We consider the momentum in relation to regulatory reforms in the nutraceutical sector to be separate and independent from the implementation of Schedule M. We have noticed conversations surrounding the concerns around regulation of nutraceuticals, especially in relation to certain nutraceutical products which are proposed to be governed by CD-SCO. The panel that was constituted in January 2024 recently submitted its

report with various recommendations in relation to nutraceutical products,” Sharma explains.

Balancing act: Giants vs. SMEs

The potential enforcement of stricter Schedule M regulations will alter India's nutra market's competitive dynamics, creating different challenges and opportunities for large players, small and medium enterprises (SMEs), and new entrants.

Sudesh Anand Shetty, Partner in Forensic Investigations, KPMG in India, highlights how large players may benefit from their financial stability. “The large players having sound financial resources for the implementation of stringent quality control may be having a competitive edge to implement the new regulation and maintain their dominance in the sector. These established players can continue competing in the international nutraceutical market that already follow similar regulations in advanced nations,” Shetty says.

Agreeing with Shetty, Nakashe, notes that smaller players and new entrants could struggle. “SMEs may struggle with the increased compliance costs and technical demands, potentially leading to consolidation or exits. New entrants could face higher barriers to entry due to the upfront investment required for compliance, slowing their market penetration. Overall, the regulatory changes may lead to a more competitive landscape, with larger, well-funded companies dominating, while SMEs and new players face challenges,” Nakashe adds.

Meanwhile, Dr Kulkarni highlights the broader implications of the new regulations on India's global reputation and the “Make in India” initiative. “The Indian companies have signed contracts with leading global companies for supply and have long-term contracts. These contracts have a penalty clause for non-supply, and these relationships have been built over the years and decades. By stopping the supply, due to enforcement of these rules, they will breach their global contracts, which will cause financial pain, destroy the reputation of the suppliers as well as the

reputation of India. This can dent the 'Make in India' programme, causing mass layoffs, closure of facilities, as well as shortages of products to consumers, both in India as well as overseas. This will also discourage investors as well as start-up founders to invest in this industry space, causing permanent damage to this sector,” Dr Kulkarni opines.

Amidst this, Mariwala, suggests a potential solution for smaller players. “This set of new regulations is bound to reshape the market. There must be collaboration between the government and industry. Financial assistance, skill development programs, and infrastructure support would go a long way in helping smaller players remain competitive. Inclusiveness and targeted support will be very vital in sustaining the growth of the sector with the protection of the interest of all stakeholders,” Mariwala suggests.

Dr Kulkarni further suggests that government action should focus on harmonising regulations with global standards. “Government can consider continuing to permit the manufacturing of drugs and dietary supplements or nutraceuticals in the same facility where such approvals are already in place. Companies should be given at least two years to re-engineer their facilities to comply with new norms. A four-five year compliance window would enable companies to invest in new manufacturing facilities, conduct validation batches, and obtain global regulatory approvals for new sites,” Dr Kulkarni recommends.

Changing perceptions

While the potential implementation could impact market dynamics, it also has the potential to reshape consumer perceptions of nutraceuticals. However, this shift could also raise concerns about affordability and product availability.

Shetty, emphasises the positive impact on consumer confidence. “The stricter regulation under Schedule M will change the consumer perception by increasing the consumer confidence towards the safety and quality assurance of the products, leading to increasing demand for Indian

nutraceuticals in both domestic and international markets,” Shetty says.

Further, Nakashe elaborates on the implications of these regulations for consumer trust. “Stricter regulations under Schedule M, which pertains to Good Manufacturing Practices (GMP) for the manufacture of pharmaceuticals, will likely change the face of nutraceuticals in the Indian market. As the nutraceutical industry becomes more regulated, the prevalence of substandard or adulterated products may decline, appealing to a segment of health-conscious consumers who prioritise credibility and certified products,” Nakashe explains.

Sharma, provides a more nuanced view on the timeline and challenges of consumer perception changes. “We do not believe that the stricter regulations under Schedule M, or rather the enhanced regulations under Schedule M, will have an immediate impact on the consumer perception of Indian nutraceuticals. We envision changes in consumer perception of nutraceuticals will be under the context of the pharmaceutical companies or contract manufacturing service providers being able to adopt and implement the requirements under Schedule M,” Sharma states.

Global standards, local shifts

As the domestic nutraceutical market braces for change, potential amendments could represent a significant regulatory shift, aligning with international standards.

Shetty pulls out the historical gaps in India’s regulatory framework. “With the increasing consumer awareness on health, India is a leading player in the global nutraceutical market. However, the regulatory standard of the nutraceutical market had been lenient in the past as compared to the global market. Until 2018, there were no guidelines related to manufacturing and testing nutraceutical products,” he states.

“Currently, FSSAI is the only key regulator to oversee these products, having issued regulations in 2018 related to labelling and health claims. The implementation of Schedule M, with stringent product quality control measures and manufacturing guidelines, is a

As India’s nutra sector explores global expansion, it must draw insights from markets with advanced regulatory frameworks to enhance safety, innovation, and market access, using these lessons to shape stronger regulations for the future

crucial step to match the standard of the Indian nutraceutical regulatory framework with international standards. This will give a competitive edge to Indian nutraceutical products in the growing global market,” Shetty predicts.

From a market perception perspective, Srivastava notes, “By enforcing stringent manufacturing standards, Indian nutraceuticals could achieve a higher perception of quality and safety, similar to premium pharmaceutical products. This move could open doors to global markets, especially in regions like the EU and the US, where regulatory rigour is a prerequisite. Furthermore, this differentiation could attract premium pricing and build a reputation for India as a leader in the nutraceutical space. India is on the path to achieving \$100 billion in the sector by 2047, which involves overhauling infrastructure.”

From a regulatory standpoint, Srivastava adds, “These changes were long overdue. Globally, countries like the US (via FDA regulations) and the EU have maintained strict separation between nutraceutical and pharmaceutical manufacturing for years. The amendments bring India in line with international standards, boosting export potential and reinforcing consumer safety domestically.”

Dr Kulkarni, however, expressed reservations, stating, “I personally do not agree with the opportunity aspect.”

Learning from the world

As India’s nutra sector explores global expansion, it must draw insights from markets with advanced regulatory frameworks to enhance safety, innovation, and market access, using these lessons to shape

stronger regulations for the future.

Speaking on it, Shetty highlights key takeaways from mature markets. “India can learn several lessons from markets with mature nutraceutical regulatory frameworks. Some of these lessons include establishing clear and comprehensive regulations compliance frameworks. A risk-based approach for different categories of nutraceutical products can be implemented, and accordingly, regulatory measures should be taken. Mandatory pre-market reviews should be in place to evaluate product safety, quality, and efficacy before selling in the open market,” Shetty said.

Providing a broader perspective, Sharma comments on the relativity of market maturity in nutra regulation. “Perhaps it may not be correct to call any market in relation to nutraceuticals as mature. We can perhaps categorise them as being relatively more mature than the Indian nutraceutical market. We generally see that nutraceutical products are regulated as dietary supplements in relatively mature markets, regulation of which is segregated from the general regulation over other food products. We have seen that there can be stringent quality control, testing, manufacturing, and approval processes to ensure the safety of these products for consumption, as well as regulations on ingredients included in such products. We also see the need for global engagement in dialogue to streamline and reach a consensus on parameters surrounding nutraceuticals,” Sharma states.

The right balance is key

The proposed amendment to Schedule M appears to be a double edged sword as, while aimed at enhancing product safety and aligning with global standards, also poses significant operational and financial challenges for manufacturers, particularly smaller companies and pharmaceutical firms. It is evident that finding the right balance between safety regulations and business realities is essential for the future of India’s nutraceutical sector.

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Nutrify Today connects suppliers, manufacturers and distributors through NutrifGenie AI

Priyanka Srivastava, Chairperson, NutrifyToday, highlights the driving factors transforming the nutraceuticals sector in recent years, NutrifyToday's role in this transformation and the company's growth plans, in an interview with **Kavita Jani**

What are the biggest challenges in India's nutraceutical landscape? How does NutrifyToday help stakeholders tackle these challenges?

Regulatory complexities are a major challenge for nutra players in India. The chances of alignment in FSSAI and CDSCO and frequent updates in compliance requirements create barriers for businesses. Secondly, a fragmented supply chain creates difficulty in connecting ingredient suppliers with manufacturers and formulators leading to gaps in ensuring quality and traceability throughout the chain. There is also limited consumer awareness about the benefits of nutraceuticals creating challenges in establishing trust and credibility for nutraceutical products.

While, limited access to advanced research and technology for product development, and high costs and extended timelines for innovation and commercialisation cause innovation bottlenecks. Additionally, challenges in fostering international partnerships due to differing market dynamics and regulations form trade barriers.

How NutrifyToday helps:

1. Regulatory guidance: NutrifGenie AI provides real-time and accurate regulatory forecasts for India and 12 other countries ensuring the right positioning of products and approval on time. It facilitates direct interactions with regulators, fostering compliance and transparency.

2. Integrated supply chain solutions: NutrifyToday offers a platform to connect suppliers, manufacturers, and distributors seamlessly through NutrifGenie AI and curated meetings through Nutrify Today C Suite Sumflex, dealsphere and business marathon. NutrifGenie AI enables Bill of



Material Forecast by integrating weekly scanning of ingredients and CMO and open production lines giving a clear picture to buyers making the right choices and leveraging the best of the supply chain.

3. Consumer and industry stakeholders education initiatives: The company collaborates with industry leaders to promote awareness about the health benefits of nutraceuticals. NutrifGenie is soon going to open its 3.6 million data points for consumers to validate product validation and avoid marketing and social media messaging clutter. For industry stakeholders' engagement and alignment to responsible nutraceutical practice, NutrifyToday's Academy works with companies to upskill the workforce and also works with Professional education institutions for capacity building for responsible nutraceuticals. The courses are certified by Centurion University and IIT Jammu.

4. Driving innovation: NutrifyToday partners with academic and research institutions to advance nutraceutical science. NutrifyToday has collaborated with AIC CCMB, NIFTEM-K, National Research and Development Corporation, and FS-SAI-Eat Right India

5. Fostering global trade: It creates opportunities for Indo-US and APAC partnerships through events like the Board Room Series and C-Suite Sumflex. The platform bridges supply chain and regulatory gaps to accelerate cross-border trades.

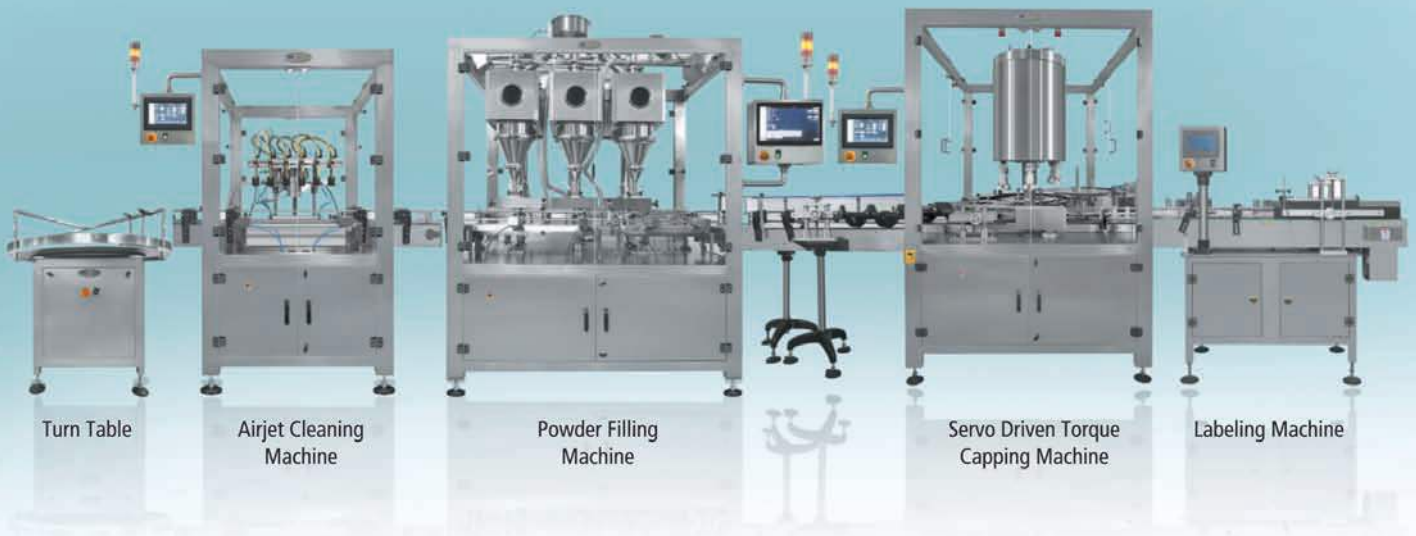
What technological gaps does NutrifGenie, NutrifyToday's AI engine, address? And how has the sector responded to it?

NutrifyGenie, NutrifyToday's AI-driven platform, is revolutionising the nutra industry by addressing several long-standing technological and operational gaps:

1. Ideation to commercialisation bottlenecks: Traditional product development cycles are lengthy and resource-intensive, with delays caused by fragmented research and development processes. NutrifGenie accelerates this process by leveraging curated AI to integrate scientific research, market trends, and regulatory insights, enabling faster and more efficient product ideation and commercialisation.

2. Access to comprehensive scientific data: Lack of centralised access to validated scientific and clinical data for ingredient efficacy and formulation. NutrifGenie consolidates over 3.6 million scientific data points comprising ingredients, biochemistry, pharmacology, clinical studies and ingredient efficacy data into a single platform, and generates synergy

PRODUCTIVITY WITH PRECISION-ELEVATE YOUR PRODUCTION WITH OUR POWDER FILLING LINE



Turn Table

Airjet Cleaning
Machine

Powder Filling
Machine

Servo Driven Torque
Capping Machine

Labeling Machine

Complete Powder filling solutions for

- Dry Syrup Powder-Oral Suspension Powders
- Nutraceutical Powder
- Veterinary Powder



reports, mechanism of action forecasting, mapping into the supply chain, regulatory and creates a differentiated portfolio on principles of biochemistry laws and pharmacology laws with bill of material forecast ensuring informed decision-making for stakeholders.

3. Regulatory compliance challenges: Complex, varying regulations across geographies make compliance a significant challenge. NutriflyGenie provides real-time regulatory guidance tailored to 12 markets, helping businesses stay compliant and reduce time-to-market.

4. Market intelligence deficit: Limited access to actionable insights on consumer behaviour, competitive analysis, and market trends. The platform uses AI analytics to deliver predictive insights on market trends and consumer preferences, enabling targeted strategies.

5. Inefficient supply chain collaboration: Disconnected supply chains result in inefficiencies, higher costs, and challenges in ingredient sourcing. NutriflyGenie connects suppliers, formulators, and manufacturers in an ecosystem, streamlining collaboration and ensuring traceability. Currently, the platform commands over 2300 supply chain stakeholders plugged into the system.

6. Limited focus on innovation: Businesses often lack the resources or expertise to innovate new formulations or explore novel ingredients. NutriflyGenie uses AI to design accurate innovative formulations, combining novel ingredients with proven efficacy to meet emerging consumer demands.

The sector has responded positively to NutriflyGenie's capabilities:

1. Adoption by leading players: Major nutra brands, in India and in the US, have integrated NutriflyGenie into their businesses as well as R&D processes to enhance efficiency and speed up product launches. Startups and small-scale formulators find the platform particularly beneficial for accessing expertise and resources typically unavailable to them. This service is offered through the NIFTEM-NutriflyGenie research network.

2. Improved collaboration: Stakeholders,

including ingredient suppliers and formulators, appreciate the platform's ability to bridge collaboration gaps and provide a seamless interface for joint ventures.

3. Enhanced trust: The platform's transparency and reliance on validated scientific data have increased trust in formulations developed through NutriflyGenie. NutriflyGenie is also the world's first nutra AI that has ISO certification, and its work has been published by a high-impact journal from Elsevier. Its work has been selected by the American Society for Nutrition in 2024 in Chicago.

4. Recognition of AI's value: NutriflyGenie has been lauded for democratising access to advanced AI technologies, previously limited to tech-savvy sectors, and introducing it to the nutra ecosystem.

5. Market success stories: Businesses utilising NutriflyGenie have reported faster product launches, cost reductions, and improved regulatory compliance, with some achieving early market leadership due to AI-driven insights. Some of the brands in the market are Nutrihance, UB Gold, Esperer-Fortitude(onco), Nanoveda, Cognibiotic, and 50 more products slated to be launched in 2025 by eight companies that are using NutriflyGenie.

What are the growth plans of the company for the next three to five years?

What are the opportunities that it seeks to leverage?

Global expansion: Building on the success of the NutriflyToday BoardRoom Series in India, the company is expanding its footprint with the launch of the US chapter. The focus will be on leveraging partnerships with Industry Transparency Center (ITC-USA) and *WholeFoods Magazine* to establish a strong presence in the North American and APAC markets.

AI-powered Innovation with NutriflyGenie: We aim to drive the adoption of NutriflyGenie among global nutra companies as a one-stop platform for ideation, market insights, regulatory compliance, and commercialisation. A series of industry workshops to promote NutriflyGenie are lined up in the US.

We also aim to incorporate machine

learning algorithms to provide predictive analytics for market trends, consumer behaviours, and ingredient innovations. And perfect the retrieval augmented generative AI using a rich proprietary database of NutriflyGenie. Partnering with academic institutions and research bodies will help us to develop novel formulations and advanced nutraceutical technologies.

Ecosystem development: We are working to expand the NutriflyToday C-Suite Sumflex series to new regions, enabling high-level interactions among industry leaders, policymakers, and investors.

To ensure supply chain democratisation, we continue building an integrated network for suppliers, manufacturers, and formulators to foster efficiency and transparency in the supply chain.

Strengthening ties with regulatory authorities across key regions will facilitate commercialisation harmonisation across the key markets.

Investment in R&D: Establish dedicated research hubs, Centers of Excellence such as the NutriflyToday Center for Responsible Nutrition and the NutriflyGenie Center for Fundamental Research in Nutraceutical Science, to pioneer new technologies and formulations. We also aim to invest in sustainable practices, including plant-based ingredients, clean-label products, and eco-friendly packaging solutions.

NutriflyToday is looking for opportunities to enter phytopharma. Additionally, we are also looking to discover powerful adjuvants rather than finding drug alternatives to complement pharma therapy, discover new ingredients from rich resources of 2700 ayurveda plants on record with NutriflyGenie and discover ingredients from food processing industry food parts waste and join the circular economy component. Working with the Rural Economic Forum and India health dialogue can help us create a sustainable transparent supply chain at the grassroots. We also look forward to collaborating with biotech companies in simulating organic compounds and reducing the farming burden.

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Nutra sector expects to see continued investments and acquisitions

Subhakanta Bal, MD, Rothschild & Co. highlights the factors that will continue to drive M&As, and how consolidation can continue to be a trend in the growing Indian nutra market, in an interaction with **Kavita Jani**

Is consolidation going to be a major trend in the nutra sector? If yes, why?

The nutraceutical sector has witnessed strong M&A activity in India over the last four to five years, both on the B2C as well as B2B side. From a consumer demand standpoint, the nutra industry is poised for strong growth. A rise in population, growing health awareness, and a shift towards preventive care are some of the factors fuelling growth for nutraceuticals. In addition, the space is also witnessing strong innovation, focus on R&D, and efficacy and safety. Some of the segments in strong demand include immunity and gut health. There is also a growing desire on the part of consumers for natural products, which are backed by science/studies.

So, can you elaborate on the drivers in both segments, B2B and B2C?

On the B2B side, several Indian nutra ingredients companies cater to a global customer base, a large and growing opportunity driven by rising consumer awareness and a shift towards preventive care. The space is witnessing interest from global strategies as well as PE funds. Several global ingredients companies have historically been quite acquisitive, enjoy strong valuations and have healthy balance sheets with low leverage. This area could witness meaningful inbound M&A activity with overseas companies looking to acquire assets in India to gain access to niche/high-growth product portfolios, expand the manufacturing base, realise supply chain/sourcing efficiencies and drive revenue synergies.

On the B2C side, we continue to see strong interest from both pharma majors as well as FMCG companies to further expand into consumer healthcare/OTC products in



This area could witness meaningful inbound M&A activity with overseas companies looking to acquire assets in India to gain access to niche/high-growth product portfolios, expand the manufacturing base, realise supply chain/sourcing efficiencies and drive revenue synergies

the health and nutrition space. Most large Indian pharma, as well as FMCG companies, enjoy a healthy balance sheet, providing the ammunition to fund inorganic growth. Several of these transactions are driven by the need to fill specific portfolio gaps. Further, for players with established routes to market for consumer healthcare products, acquisitions can offer meaningful cost synergies.

We expect to see continued investments as well as acquisitions in the sector driven by the above factors.

What aspects are considered by companies before knowing which area to expand into and what kind of a player should be considered for an acquisition or partnership?

I would look at this in two parts.

In the nutra ingredients space, companies with a strong focus on branded ingredients, emphasis on R&D, scientifically validated products (backed by clinical studies), and consistent output in terms of product quality are attracting strong investor interest. Branded ingredients play an important role in driving consumer demand/willingness to pay a premium. Scientifically validated products are relevant both in terms of efficacy as well as safety. On the B2C side, there is a focus on large brands/companies with scaled-up portfolios, to offer meaningful add-on as a target/asset. Scaled-up brands/assets offer the benefit of established market recognition and acceptance, positive word-of-mouth/recall within the prescriber community as well as the ability to further drive education and awareness on product benefit, thereby offering a virtuous cycle for growth.

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We, at OmniActive, invest over 10 per cent of the total outlay into R&D

Sanjaya Mariwala, Executive Chairman and MD, OmniActive Health Technologies shares insights into the company's significant investments in R&D, advanced testing capabilities, and strategies for optimising bioactive ingredients. He also discusses the impact of regulatory changes, quality assurance, and consumer education in the evolving nutraceutical landscape, in an interview with **Viveka Roychowdhury**

What has been the investment into the company's Research & Development (R&D) facility in Pune and other locations?

We, at OmniActive, invest over 10 per cent of the total outlay into Research & Development. Through pioneering seed programmes and conducting stringent trials, we are continuously raising the standards of our specialty branded ingredients to garner consumer trust globally. We filed 95 patents and 49 clinical trials in FY24, to further consolidate leadership in product innovation, safety, and efficacy.

With two state-of-the-art facilities, located in Pune and Thane, Maharashtra recognised by the Department of Scientific and Industrial Research, we have a strong team of highly qualified scientists and agriculturalists, many holding advanced degrees.

The company has recently expanded its capabilities with a high-end instrument testing lab. Kindly give details of the enhanced effectiveness of the tech transfer process due to these new capabilities.

The new testing lab, equipped with cutting-edge technology, has transformed how we work at OmniActive. We can now speed up testing and validation, which means we're getting our formulations to market much faster. The high-quality data gathered helps us make smarter decisions, allowing us to optimise our processes before we scale up. Plus, this enhanced capability strengthens our quality control, ensuring our bioactive ingredients meet all the necessary safety



and regulatory standards. With real-time monitoring, we can quickly change the processes as per the requirements, boosting yields and product quality. Overall, this lab not only helps us refine existing ingredients but also inspires the development of new products to meet our customers' evolving needs.

With bioactives, there is a loss of product from plant to bioactive ingredient, between the stages of extraction, purification, etc. How has OmniActive optimised yields to improve profitability, bioavailability as well as patient safety?

The journey from plant to bioactive ingredient can result in product loss during extraction and purification. That's why, at OmniActive, we focus on efficiency and recovery to maximise yields. By fine-tuning parameters such as temperature, pressure, and solvent ratios, we ensure that we extract the highest quality bioactives while preserving their integrity. This enables us to optimise dosages in our final products, enhancing both bioavailability and patient safety. Additionally, we conduct safety studies and evaluate how our enriched extracts can be applied in various delivery formats, such as gummies and ready-to-drink options. By providing clear information about our bioactives, we aim to boost consumer confidence, ultimately driving sales and improving profitability.

Regulatory agencies are raising the bar on evidence-based medicines, including bioactives. In India, there is a move to shift from the FSSAI to CDSCO. What are your views?

Moving nutra products under CDSCO would introduce price controls, which may work well for essential drugs and medicines but not for nutraceuticals. These health and nutrition supplements are a conscious, discretionary choice for consumers, driven by personal wellness goals. While we always aim to keep our products competitively priced, imposing price controls could harm the industry by limiting innovation and reducing consumer options.

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Sigachi isn't just a supplier; we are a strategic partner

Amit Raj Sinha, MD and CEO, Sigachi explains that his company's strategic growth and diversification across excipients, APIs, food, nutrition, and personal care are driven by innovation, sustainability, and a customer-first approach. The company's focus on quality, regulatory compliance, and digital transformation positions it as a trusted global partner across industries

What differentiates Sigachi from competitors?

Sigachi stands as an industry leader with an unmatched production scale—33000 MTPA for its excipients and nutritional premix range, allowing us to fulfill complex client demands with consistent quality and reliability. Our expertise spans multiple verticals, including APIs, excipients, food and nutritional ingredients, and personal care Ingredients, ensuring clients have access to an integrated, one-stop source for high-quality ingredients.

Our commitment to growth aligns with that of our customers growing needs and is reinforced by certain strategic projects, including the upcoming greenfield facility in Dahej SEZ. The state-of-the-art facility will expand our production capacity, support innovation, and set new standards for operational excellence within the industry.

Sigachi's customer-centric approach, combined with a strong emphasis on sustainable operations—from eco-friendly sourcing to waste reduction—positions us as a responsible and sustainable, trusted partner. Additionally, our dedication to innovation is supported by continuous R&D investment, poised to grow from a lower single-digit to a mid-single-digit percentage of revenue. Our R&D facility, recognised and approved by Department of Scientific and Industrial Research, Government of India, leads advancements in excipient development and multifunctional ingredient solutions, providing clients with cutting-edge, high-quality products.

Sigachi isn't just a supplier; we are a strategic partner, dedicated to delivering excellence, fostering sustainable growth,



and supporting clients across diverse sectors with reliability and agility.

Sigachi has expanded significantly from MCC excipients to APIs, food, nutrition, and personal care. What prompted this diversification, and how do you ensure cohesive growth across such varied sectors?

Our diversification into APIs, food, nutrition, and personal care reflects our strategic foresight and market-driven approach. By leveraging our core expertise in excipients

and ingredients, we identified opportunities to expand and mitigate sector-specific risks, aligning with emerging demands for patient-centric, multifunctional products.

Sigachi's centralised planning team coordinates our objectives across sectors, while our specialised divisions ensure we meet industry standards and regulations in each field. Cross-functional R&D collaboration is a vital strategy for us, enabling innovations like co-processed multifunctional excipients that meet the evolving needs of the Pharma, Nutra, and Food industries. This approach has been key to supporting cohesive, sustainable growth across Sigachi's varied portfolio.

How does Sigachi maintain rigorous quality standards, and what internal processes are in place to ensure compliance across regions and product categories?

At Sigachi, quality is non-negotiable. Our facilities maintain certifications like ISO 9001:2015, EXCiPACT GMP, SGMP, HACCP, and EDQM CEP, highlighting our alignment with global standards. Every production phase undergoes stringent checks, from raw material inspection to finished product testing, overseen by our Quality Control and Assurance teams. Additionally, Sigachi has multiple DMFs filed with USFDA for its excipients range.

Sigachi's R&D, now benefiting from increased investment, has achieved significant breakthroughs, such as the development of advanced excipients like BARETab™ PH and HiCEL™ HFS. Our focus on innovation strengthens our competitive edge while providing clients

with consistent, high-quality, and compliant products across diverse regions. This dedication to quality and regulatory excellence positions Sigachi as a reliable partner in the pharma and nutra sectors.

Sigachi has expanded its reach across Asia, Australia, the Americas, Europe, and the Middle East. How do you navigate regulatory complexities to ensure compliance in diverse markets, and what are the primary challenges?

Sigachi's expansion strategy is built on a robust regulatory framework. Regional teams work closely with our central compliance division to ensure adherence to local requirements across our global markets. This structure allows us to maintain consistency while adapting to market-specific regulations.

Our recent joint venture, Sigachi Arabia, further illustrates our commitment to regional adaptation and regulatory understanding. This JV with Saudi National Projects Investment is set to strengthen our presence in the Middle East and expand into the GCC market. Our continuous training and relationships with regulatory bodies enable us to preemptively adjust to

evolving standards, securing compliance and a strong foothold in all regions we serve. Our World Team Strength of more than 1450 spread across all major geographies underlines our commitment to customer needs across the globe, furthering our purpose of "Healthier, Happier and Joyful World"

How is Sigachi leveraging digital transformation or other technologies to optimise production, improve supply chain reliability, or enhance customer engagement?

Digital transformation at Sigachi is central to our mission of enhancing efficiency, optimising supply chains, and deepening client engagement. Advanced ERP systems grant us real-time insights, while predictive analytics anticipate potential supply chain disruptions, ensuring reliable product delivery.

Our customer-centric digital platforms, part of our "Experience Excellence" initiative, allow clients seamless access to product information, order tracking, and support, reinforcing our commitment to quality service. Additionally, investments in smart manufacturing and process

digitalisation help us streamline production and remain responsive to client needs, further strengthening Sigachi's industry position.

What are some emerging trends in the industries Sigachi serves, and how is the company positioning itself to leverage these trends over the next decade?

Emerging trends like the demand for multi-functional excipients, sustainability, and digital manufacturing are redefining our industry landscape. Sigachi's focus on innovation aligns with these trends, as we develop high-performance excipients that increase efficiency in drug delivery and nutraceutical applications.

Our increased R&D investment reflects our dedication to innovation, particularly in eco-friendly and patient-centric solutions. Sigachi Arabia, our joint venture in Saudi Arabia, marks a significant step toward local production in high-growth markets. By staying ahead of industry shifts and expanding our regional presence, Sigachi is positioned as a resilient, forward-thinking partner capable of delivering sustainable, high-quality solutions over the next decade.

We, at OmniActive, invest ...

Quality assurance generally adds to the cost of the final product. Is OmniActive concerned about cheaper ingredients from domestic competitors as well as other nutra CDMOs from other countries?

Purchasing supplements is a discretionary spend, and consumers are often willing to pay for higher quality. OmniActive's research indicates that more than half of surveyed individuals in prominent markets trust branded ingredients in health products, with 44 per cent willing to pay up to 75 per cent more for premium materials. There is a strong preference for quality products. Educating consumers about the value of branded ingredients is essential to further boost this trend. Some of our clients have suc-

cessfully implemented strategies such as displaying supplier logos and QR codes on packaging, allowing consumers to easily access information about the ingredients and clinical results. This transparency reinforces their decision to prioritise quality over cost.

How do bigger companies like OmniActive educate the end user/consumer/patient on ingredient quality, and efficacy when there might be cheaper alternatives in the market?

We follow a 360-degree approach to consumer education, helping them feel confident in choosing our ingredients over low-cost alternatives. At OmniActive, the emphasis is given to quality and efficacy through scientific validation, transpar-

ent communication, and credible endorsements. This commitment is further strengthened through research and clinical trial reports, alongside insights into ingredient sourcing, unique formulations, and benefits shared via blogs, webinars, and infographics. Additionally, partnerships with healthcare professionals, doctors, and dietitians, as well as GMP and other third-party certifications, reinforce this message. Our digital strategy also involves collaborations with key opinion leaders, influencers, and experts to drive engagement and raise awareness of safe and effective ingredients.

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Fortifying nutra supply chains

Experts from the nutraceutical industry share strategies to build resilient supply chains. From supplier diversification and technology integration to sustainability and regulatory adherence, their insights offer a roadmap for navigating challenges in the nutra supply chain

Strong, long-term partnerships with suppliers are crucial

The nutraceutical supply chain is complex and demands a forward-thinking, strategic approach to monitor risks and ensure operations continue smoothly. To deal with challenges such as supply shortages and geopolitical disruptions, I focus on diversifying our supplier base across multiple regions, keeping away from overdependence on a single location. Furthermore, maintaining a buffer of critical raw materials through effective inventory management helps to ensure that we are prepared for unexpected disruptions without holding excess capital. By using data-driven scenario planning, we can anticipate potential risks, such as regulatory changes or market shifts, and develop actionable contingency plans. Strong, long-term partnerships with suppliers are crucial for ensuring consistent quality, fostering trust, and promoting collaboration during uncertain times. We also conduct regular supplier audits to ensure adherence to our quality and ethical sourcing standards, further strengthening the reliability and sustainability of our supply chain.

Navigation of regulatory compliance in such a dynamic industry is equally important. To ensure this, I implement robust traceability systems that provide comprehensive visibility of raw materials, ensuring compliance with standards like GMP, HACCP, and FSSAI. A dedicated regulatory affairs team closely monitors evolving global regulations, enabling us to adapt quickly and stay compliant. Internal and external quality checks provide us with the ability to identify risk early and ensure we deliver our products to the highest quality



Karthik Kondepudi,
Partner & CEO – Herbochem

Strong, long-term partnerships with suppliers are crucial for ensuring consistent quality, fostering trust, and promoting collaboration during uncertain times. We also conduct regular supplier audits to ensure adherence to our quality and ethical sourcing standards, further strengthening the reliability and sustainability of our supply chain.

standards. Not to forget, we also have third-party testing and certification organisations to validate the safety and efficacy of the product to gain regulatory and consumer bodies additional assurance.

Diverse international market demands do apply to our company focus. To achieve this, I will emphasise the need for localised warehouses and distribution centers in major markets such as the US and Europe. It decreases delivery time and allows me to meet regional needs efficiently. For example, awareness of the trends of clean-label products in Europe or organic certifications in the US enables us to tailor our products to their needs. Digital tools such as advanced ERP systems and AI-driven demand forecasting further enhance our flexibility in our supply chain. This allows production and distribution to align with real-time market needs. Blockchain technology, on the other hand, also enhances transparency and trust, particularly in markets where traceability becomes a key factor in purchasing decisions.

Ultimately, a resilient and adaptable supply chain is what ensures success in this fast-growing nutraceutical industry. We will mitigate all the risks and fulfill all the diverse needs of our consumers by introducing advanced technology, strategic planning, and the incorporation of strong partnerships. Efficiency, coupled with regulatory compliance and market-specific adaptability, helps us consistently deliver quality products. We focus on sustainability, innovation, and customer-centric solutions, ensuring we continue to be a trusted partner in advancing global health and wellness via nutraceutical products.

A resilient nutra supply chain integrates quality, innovation, and technology

The nutraceutical industry, characterised by its focus on health and wellness, faces multifaceted challenges stemming from supply shortages, geopolitical disruptions, and evolving regulatory landscapes. As leaders in this domain, it is essential to implement strategies that prioritise resilience, innovation, and compliance while ensuring operational excellence and market adaptability.

Some of the key risk mitigation strategies include:

Building resilience and agility

◆ **Multiple supplier partnerships across regions:** Diversifying supplier networks across geographies safeguards against localised disruptions. These partnerships ensure uninterrupted access to critical raw materials, mitigating the impact of geopolitical or environmental events.

◆ **Enhanced quality control systems:** Rigorous quality assurance protocols, bolstered by advanced testing methods, are essential to meet regulatory requirements and maintain consumer trust. Integrating AI-powered tools for real-time monitoring enhances the detection of deviations, ensuring consistent product quality.

◆ **Digital tracking and blockchain-enabled traceability:** Transparency across the supply chain fosters accountability and builds consumer trust. Blockchain technology facilitates end-to-end traceability, ensuring that raw materials and finished products, meet stringent standards. This innovation also simplifies audits and recalls by providing immutable records.

◆ **Regulatory compliance automation:** Adhering to diverse regulatory requirements across global markets can be streamlined with automated compliance systems. Predictive regulatory intelligence tools enable companies to anticipate and adapt to changes, ensuring uninterrupted market access.

◆ **AI-powered supply chain optimisation:** Artificial intelligence transforms supply



Karan Khurana, Founder & CEO, WishNess Wellness

The nutraceutical industry serves a diverse global audience, each with unique preferences and regulatory requirements. Automated compliance systems simplify adherence to varying standards, while predictive regulatory intelligence ensures readiness for upcoming changes.

chain management through advanced demand forecasting, inventory optimisation, and route planning. These tools enhance efficiency, reduce costs, and minimise the risk of shortages or overstocking.

Embracing quality, innovation and technology

The foundation of a resilient nutraceutical supply chain lies in the integration of quality, innovation, and technology at every stage of operations.

Quality as the cornerstone: Adopting non-negotiable quality standards from day

one ensures consumer trust. Advanced quality assurance protocols, including automated checks and real-time monitoring, provide a consistent baseline for compliance and customer satisfaction.

Innovation for future readiness: Continuous innovation in processes and products strengthens the supply chain's ability to adapt to changing market dynamics. Integrating predictive analytics for risk management and AI-powered tools for predictive maintenance ensures smooth operations and minimises disruptions.

Technology as the enabler: Advanced technologies like blockchain and AI are redefining the supply chain landscape. Blockchain enhances traceability, while AI-driven predictive analytics provide actionable insights for proactive risk management. Together, these tools ensure efficiency and agility in meeting market demands.

Ensuring compliance while addressing market diversity

The nutraceutical industry serves a diverse global audience, each with unique preferences and regulatory requirements. Automated compliance systems simplify adherence to varying standards, while predictive regulatory intelligence ensures readiness for upcoming changes. Blockchain-enabled traceability and advanced quality assurance protocols further reinforce compliance, maintaining the integrity of the supply chain and fostering consumer confidence.

The way ahead

To thrive amidst uncertainties, nutraceutical companies must embrace a multi-pronged approach combining diversified supplier networks, cutting-edge technologies, and a culture of continuous innovation. By prioritising resilience, transparency, and quality, the industry can not only mitigate risks but also establish itself as a trusted leader in health and wellness solutions.

Maintaining safety stock levels for critical materials is a key strategy

Botanic Healthcare has implemented robust strategies aimed at enhancing supply chain resilience in response to ongoing global challenges, including supply shortages, geopolitical disruptions, and evolving regulatory landscapes. As a company committed to quality and sustainability, Botanic Healthcare is taking proactive measures to ensure the uninterrupted delivery of high-quality products to its customers.

In light of recent disruptions in global supply chains, Botanic Healthcare has diversified its supplier base by establishing relationships with multiple suppliers across various regions. This strategic move not only reduces dependency on single sources but also mitigates risks associated with local disruptions, ensuring a steady flow of essential materials.

To further bolster its supply chain, Botanic Healthcare conducts regular risk assessments to identify potential vulnerabilities. By continuously monitoring economic, political, and environmental factors, the company is well-prepared to respond swiftly to any challenges that may arise. Scenario planning allows Botanic Healthcare to develop effective response strategies, ensuring operational continuity even in uncertain times.

Maintaining safety stock levels for critical materials is another key strategy employed by Botanic Healthcare. By keeping buffer inventory, the company can cushion against unexpected supply shortages, ensuring that production remains uninterrupted. Regular reviews of inventory levels based on market demand enable the company to optimise costs while meeting customer needs.

Proactive communication with suppliers is essential to Botanic Healthcare's approach. By fostering strong relationships and engaging in open dialogue, the company gains



Madhu Krishnamani, Founder & MD, Botanic Healthcare

By keeping buffer inventory, the company can cushion against unexpected supply shortages, ensuring that production remains uninterrupted. Regular reviews of inventory levels based on market demand enable the company to optimise costs while meeting customer needs.

valuable insights into supplier operations and potential challenges. Additionally, collaboration with industry groups enhances collective resilience, allowing for the sharing of best practices and risk management strategies.

Botanic Healthcare is also committed



Gaurav Soni, Founder & MD, Botanic Healthcare

to regulatory compliance. The company stays informed about changes in regulations across all markets and conducts regular audits of its supply chain processes. This ensures that all suppliers adhere to necessary certifications and quality standards, maintaining the highest level of compliance.

Sustainability remains a core value at Botanic Healthcare. The company prioritises ethical sourcing and transparency in its supply chain, building trust with consumers and stakeholders alike. By selecting suppliers who share its commitment to sustainable practices, Botanic Healthcare contributes to a more responsible healthcare industry.

As Botanic Healthcare continues to navigate the complexities of the global market, its unwavering commitment to quality, sustainability, and resilience positions it as a trusted leader in the nutraceutical sector.

Strategic approaches for pharma companies entering the nutraceutical sector

With a strong foundation in manufacturing and scientific research, Indian pharma companies can effectively enter and potentially lead the nutraceutical space, explains **Shubham Sanghavi**, Consultant; and **Soham Sinha**, Senior Consultant, Avalon Consulting

A significant transformation is underway in global healthcare, with an increasing focus on preventive care. As awareness of health issues rises, especially due to lifestyle diseases and the pandemic's lingering effects, the demand for products promoting long-term wellness is growing. Nutraceuticals—encompassing dietary supplements, functional foods, and fortified beverages—are emerging as key components in this trend. The Indian pharmaceutical sector is uniquely positioned to leverage this growing market. With a strong foundation in manufacturing and scientific research, Indian pharma companies can effectively enter and potentially lead the nutraceutical space.

India's pharma industry: A launchpad for nutraceutical growth

India's pharmaceutical industry is a global powerhouse, particularly known for its role in generic drug production. The global nutraceutical market is experiencing rapid growth, projected to expand from \$402.5 billion in 2022 to over \$1.3 trillion by 2032, at a CAGR of 12.9 per cent. India's nutraceutical sector, while still emerging, shows substantial promise, growing from \$4 billion in FY20 to \$6.1 billion in FY23, with an expected CAGR of 11.6 per cent through 2030. This growth is driven primarily by dietary supplements, functional foods, and beverages, with impressive CAGRs of 15.0 per cent, 12.5 per cent, and 11.0 per cent, respectively. Key factors supporting this trajectory include increased health awareness, rising disposable incomes, and a burgeoning middle class investing in preventive health measures. Urban centres like Mumbai, Delhi, and Bangalore, with their



Shubham Sanghavi



Soham Sinha

health-conscious populations, are expected to be pivotal markets for nutraceutical products.

Addressing challenges: Regulatory and quality barriers

Despite its promising outlook, the Indian nutraceutical market faces significant regulatory and quality challenges that could undermine its growth. The proliferation of substandard and counterfeit products due to low entry barriers erodes consumer trust and intensifies pricing pressure. Many small, unbranded players flood the market with misleading product labels and dubious quality claims, raising safety concerns. New entrants may lower ingredient quality to compete, compromising product integrity. Additionally, the lack of robust clinical trials and proper validation of product claims further undermines safety. Poor consumer education exacerbates these issues, with many misusing or over-consuming nutraceuticals without understanding proper dosages or

potential interactions. Regulatory bodies like FSSAI struggle to effectively monitor the growing number of products, and the absence of a strong certification agency adds to the challenge. A more stringent regulatory framework, similar to US FDA controls, would help ensure safety, improve compliance, and restore consumer confidence.

Leveraging pharma strengths in R&D and compliance

Pharmaceutical companies are uniquely positioned to navigate these obstacles. Their extensive experience in research and development enables them to conduct rigorous scientific trials and ensure the safety and efficacy of their nutraceutical products. By leveraging clinical trial expertise, pharma companies can build consumer trust and differentiate their offerings. Additionally, their existing production infrastructure allows for low manufacturing costs while maintaining high product quality.

Ensuring compliance with regulatory standards is crucial. Pharmaceutical companies can extend their understanding of regulatory requirements to the nutraceutical sector. Adhering to FSSAI standards and good manufacturing practices (GMP), while acquiring necessary certifications, can enhance the industry's overall credibility. By establishing higher benchmarks for quality control through clinical validation, pharma-led nutraceuticals can be positioned as safer and more reliable choices for consumers.

Innovations in product development and strategic collaborations

Innovation in product development will be key to gaining a competitive edge. Personalised nutraceuticals tailored to individual health needs, developed with healthcare professionals, can offer effective solutions. Collaborating with nutritionists and doctors can lead to evidence-based formulations addressing specific health issues.

Building a strong brand will also be essential for long-term success, requiring investment in digital marketing strategies, including influencer campaigns and partnerships with health experts.

Distribution strategies and partnerships for growth

Pharma companies can capitalise on their existing distribution networks. Their established relationships with pharmacies, hospitals, and healthcare providers facilitate the introduction of nutraceutical products to these markets. Expanding into e-commerce and direct-to-consumer (D2C) platforms is equally important for reaching tech-savvy consumers who prefer online purchasing. A multichannel distribution approach will help pharma companies gain a strong foothold in the market.

Strategic partnerships can further accelerate growth. Collaborations with ingredient suppliers, contract manufacturers,

or foreign nutraceutical brands can provide access to specialised expertise in areas like herbal formulations. Strategic M&A can also serve as effective entry points, as seen with Nestlé's acquisition of Persona and Abbott Laboratories' purchase of EAS.

Conclusion

The Indian nutraceutical market presents substantial opportunities but also unique challenges. Pharmaceutical companies, equipped with strong R&D capabilities and regulatory expertise, are well-positioned to address these issues and advance the sector. Their success will depend on effective collaboration with regulators like FSSAI, who must strengthen monitoring mechanisms and establish higher quality and safety benchmarks. A concerted effort between the industry and regulatory bodies will enhance consumer trust and ensure sustainable growth, positioning India as a global leader in nutraceuticals in the long term.

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Nutraceuticals 2025: Mapping growth, innovation, and consumer-centric trends

Industry experts highlight the evolving dynamics, regulatory needs, and personalised solutions driving the nutra market ahead of 2025

The Indian nutraceutical market is set to grow sixfold by 2030

The Indian nutraceutical market is projected to reach \$64 billion by 2030. Currently, it stands at around \$5-10 billion, which means it is expected to grow approximately sixfold at an annual growth rate of 14 per cent. The trend is definitely upward, and post-pandemic awareness about nutraceuticals has accelerated this growth. People are increasingly leaning towards prevention and preventive care rather than relying solely on therapeutic medications. The nutraceutical market began to gain traction around 2005-2010, growing steadily since then. However, the COVID-19 pandemic served as a significant turning point, increasing awareness about health and wellness. People started understanding the importance of maintaining their health proactively.

The nutraceutical market is typically divided into three segments:

1. General health awareness: This segment caters to individuals who are health-conscious but not necessarily athletes or fitness enthusiasts. Products in this segment include multivitamins, omega supplements, and other general wellness products that address common health needs.

2. Sports nutrition: This category is designed for athletes or individuals engaged in high-intensity physical activities like powerlifting or muscle building. Such individuals require specific nutrition, such as higher protein intake, omega supplements, and antioxidants, to support their rigorous routines.

3. Medical nutrition: This is a growing segment addressing specific medical



Kalka Prasad, AVP - Marketing, Crius Life

needs. Products in this category are often prescribed by practitioners, such as nephrologists for renal care or diabetologists for managing diabetes. Medical nutrition includes formulations for conditions like cardiac health, diabetes, and renal issues, often recommended as supplements to complement a patient's diet when regular meals alone cannot meet all nutritional requirements.

India is already considered a pharmaceutical hub, and regulatory clarity can further boost the nutraceutical industry. Recently, FSSAI introduced amendments to ensure a clear separation between drug and nutraceutical production facilities. This prevents issues like cross-contamination. For instance, vitamin D supplements produced in doses under 600 IU are categorised as food, while higher doses are classified as drugs. However, this demarcation often leads to ambiguity,

as the core nature of the ingredient remains unchanged. Similarly, methylcobalamin (Vitamin B12) highlights regulatory inconsistencies. For general use, the recommended dose is 2.2 mcg, but for medical purposes, doses can go up to 1,500 mcg or more. Despite its nutraceutical nature, certain manufacturing restrictions exist, creating confusion. Greater awareness and transparency from regulatory bodies would help manufacturers and consumers alike.

To ensure the industry's growth, several factors need attention:

1. Awareness: Government initiatives should focus on educating people about the role of nutraceuticals in day-to-day wellness and preventative health care.

2. Quality Standards: Uniform regulations and compliance with standards like WHO CGMP are critical. Currently, many players in the market do not adhere to these standards, resulting in inconsistent quality. Regulatory enforcement should be stricter and uniform for all players.

3. Research and Development: R&D is the backbone of innovation. Companies should allocate 10-15 per cent of their budgets to R&D to develop new and innovative products. My company, for instance, has been recognised as an innovative company and is continuously investing in R&D to maintain its edge in the market. In conclusion, while the industry is poised for significant growth, addressing regulatory ambiguities, enhancing quality standards, and fostering innovation will be critical for sustained progress.

The future of nutraceuticals lies in personalised, impactful, and sustainable solutions backed by science

As we step into 2025, the nutraceutical industry is going through a transformative phase driven by dynamic consumer demands, technological advancements and a growing demand for customisation. Today's consumers are more aware and proactive about their health and fitness levels and are seeking products that are not only effective but also to a large extent, tailored to their unique needs. Trends like personalised nutrition, fueled by advancements in genomics and AI, are redefining how we approach health and wellness. Focus on strong R&D and product innovation with science-backed solutions will be rampant



Shreyans Jain, Founder & Executive Director, Nutrabay

in the coming year.

At Nutrabay, we focus heavily on product R&D and innovation and deploy sizable resources on identifying new ingredients and formulations that are efficacious. Along with product innovation, transparency about ingredient usage and consumer education to impact ingredients or combination of ingredients on their systems empower consumers to take control of their wellbeing and support their unique health goals. As we look ahead, the future of nutraceuticals is one of personalised, impactful, and sustainable solutions that truly enhance lives.

The rise of personalised vitamin supplements marks a new era in tailored health and wellness solutions

The global nutraceuticals market size was valued at \$712.97 billion in 2023 and is expected to grow at a CAGR of 8.4 per cent from 2024 to 2030. Whereas the global vitamin supplements market size was estimated at \$48.51 billion in 2022 and is expected to grow at a compound annual growth rate (CAGR) of 7.3 per cent from 2023 to 2030.

Vitamins and supplements are the products taken in small doses concentrated to support the body's physiological functions, maintain health status, promote physical and mental well-being or reduce the risk of disease.

A significant trend in the dietary supplement market is the rise of personalised vitamin supplements, tailored to an individual's specific health needs, lifestyle etc. This approach involves using health assessments, blood tests in order to determine the exact vitamins and minerals an individual requires.

For example, some people might need higher doses of vitamin D due to low sun exposure and age-related deficiencies, while others may require more vitamin



Dr G Chakravarthi, Principal, College of Pharmacy, KL Deemed to be University

B12 because of an imbalanced diet.

Keeping in view of this, companies like GSK, Herbalife, Pfizer etc are offering in the forms like pills, powders, or even liquid sachets for vitamin

Health experts caution that while personalised supplements are promising, they should complement a well-rounded diet and be taken under medical supervision to ensure safety and efficacy

supplements.

Health experts caution that while personalised supplements are promising, they should complement a well-rounded diet and be taken under medical supervision to ensure safety and efficacy.

The value of beadlet technology

Aaron Quinn, Head of Business Development, Vantage Nutrition highlights the advantages of Beadlet technology and explains that it offers the flexibility to produce smaller batches efficiently and scale up as rapidly as needed

More widely used in the pharmaceutical industry, beadlet technology is playing catch up within the nutraceuticals sector across Europe. But it is gaining momentum, and rapidly becoming recognised as an optimal way of delivering ingredients to the body.

The levels of awareness around beadlet technology in Europe are far lower than in the US, but the overall benefits and efficacies - along with its visual aspects - remain unparalleled.

What are the benefits?

One of the main areas is monitoring how much more of a dose goes into the body and how quickly, when comparing traditional dosage formats like powder-filled capsules with beadlets.

With powder-fill dosages, the capsule ruptures and breaks quickly and the body is unable to absorb the contents all at once, instead some of the contents are excreted. In a beadlet format, without any functional coating the beads take longer to break down. Indeed, there is a great deal of evidence when it comes to using beadlets, where patients are seeing real tangible benefits. Beadlet formulations have the ability to enhance the bioavailability of active ingredients - to help improve absorption and efficacy.

Branding

The claims made around absorption mean that we are seeing brands particularly on subscription-based models opting to use beadlet technology, which is reducing their consumers from switching to other brands - ultimately - helping them to achieve efficacious results.

The rise of start-ups

Increasing numbers of start-ups are also coming into the industry, particularly post-



Covid. Many are opting for this beadlet technology, coupled with a consultative approach, as their brands grow.

Moving forward, it is important they retain strong partnerships - working with partners who can support them with the right technology and be flexible throughout the process. Start-ups often lack the time or capacity to place large orders initially, but they need to respond quickly to market demands. Beadlet technology offers the flexibility to produce smaller batches efficiently and scale up as rapidly as needed. For example, a 2022 study by the International Journal of Pharmaceutics demonstrated that beadlet technology allows for precise control over release profiles and dosage forms, enabling manufacturers to produce customised batches. This adaptability is crucial for new businesses looking to grow without compromising on product quality or market responsiveness.

What does the future hold?

Increasing numbers of brands are looking to produce and do something different in this saturated market. Visually, a product

needs to look good, and it needs to do the job. Ultimately, it has to have a strong label claim to be a success.

Big brands with a plethora of products are looking to branch into new technologies to entice new customers to their brands, and they are investing into their hundreds of millions.

The EU is currently playing catch-up in the adoption of beadlet technology compared to other regions, notably the US. There is a critical need for education around this technology, including its benefits, uses and effective positioning for customers and brands to help foster widespread acceptance and usage.

Evidence of growing interest in beadlet technology was prominently displayed at VitaFoods Europe 2024, where it was highlighted as one of the top three emerging trends in the nutraceutical industry. A report from VitaFoods Insights noted a significant increase in the number of European firms exploring beadlet technology, reflecting a broader industry trend. We stand on the cusp of significant change, with beadlet technology poised to bring transformative benefits to the industry.

Technical Panel Discussion

Integration into functional foods and beverages - enriching food recipes with value-added ingredients and botanicals



Thursday, February 6, 2025



11:20 hrs - 12:20 hrs (IST)

MODERATOR



Dr. Vaibhav Kulkarni
*Hon. Secretary, HADSA &
Founder & Director
Zantus Lifesciences*

PANELISTS



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