

CHAPTER ONE: INTRODUCTION.....	1
STUDY GOALS AND OBJECTIVES.....	1
REASONS FOR DOING THE STUDY	1
INTENDED AUDIENCE.....	2
SCOPE OF REPORT	2
INFORMATION SOURCES.....	2
RELATED BCC REPORTS	3
BCC ONLINE SERVICES.....	3
DISCLAIMER	3
 CHAPTER TWO: SUMMARY.....	 4
<i>SUMMARY TABLE GLOBAL NUTRACEUTICALS MARKET – FOODS, BEVERAGES AND SUPPLEMENTS, THROUGH 2016 (\$ MILLIONS)</i>	 4
<i>SUMMARY FIGURE GLOBAL NUTRACEUTICAL MARKET – FOODS, BEVERAGES AND SUPPLEMENTS, 2009-2016 (\$ MILLIONS)</i>	 5
 CHAPTER THREE: MARKET OVERVIEW	 6
MARKET OVERVIEW	6
<i>FIGURE 1 FUNCTIONAL FOOD, BEVERAGE, AND SUPPLEMENT MARKET</i>	 7
DUAL COMPETITION IN FUNCTIONAL FBS MARKET.....	7
FALSE PRODUCT CLAIMS DAMAGING OVERALL MARKET.....	8
STAKEHOLDERS’ OPPORTUNITIES IN THE GROWING FUNCTIONAL FBS MARKET	 8
SUPPLY SIDE AND DEMAND SIDE FACTORS INFLUENCE SECTOR.....	 8
DEMAND-SIDE DRIVERS.....	9
The Elderly Population Expands	9
Young Consumers’ Focus on Health	9
Obesity Epidemic.....	9
SUPPLY-SIDE DRIVERS.....	9
Nutraceuticals Offer Premiumization Opportunity.....	9
Media and Science Are Pushing the Functional Market into the Mainstream.....	 10
Escalating Health Care Costs.....	10
Technology Driving Higher Efficacy	10
DEFINING THE NUTRACEUTICAL MARKET: FUNCTIONAL FOOD, BEVERAGE, AND SUPPLEMENT (FBS) MARKET	 10
DEFINING THE FUNCTIONAL FOOD PRODUCT MARKET	11
<i>TABLE 1 GLOBAL NUTRACEUTICAL FOOD PRODUCT MARKET, THROUGH 2016 (\$ MILLIONS)</i>	 11
DEFINING THE FUNCTIONAL BEVERAGE MARKET	12
<i>TABLE 2 GLOBAL NUTRACEUTICAL BEVERAGE MARKET, THROUGH 2016 (\$ MILLIONS)</i>	 12

DEFINING THE FUNCTIONAL SUPPLEMENTS MARKET.....	12
<i>TABLE 3 GLOBAL NUTRACEUTICAL SUPPLEMENTS MARKET, THROUGH 2016 (\$ MILLIONS)</i>	13
DEFINING THE FUNCTIONAL INGREDIENTS MARKET	13
<i>TABLE 4 GLOBAL NUTRACEUTICAL INGREDIENTS MARKET, THROUGH 2016 (\$ MILLIONS)</i>	13
DEFINING THE FUNCTIONAL APPLICATION MARKET — FOCUS ON HEALTH SEGMENTS AND DISEASES.....	14
<i>TABLE 5 GLOBAL NUTRACEUTICAL HEALTH APPLICATION MARKET, THROUGH 2016 (\$ MILLIONS)</i>	14
MARKET STRUCTURE.....	14
FUNCTIONAL PRODUCT MARKET — PREMIUM VS. MASS MARKET POSITIONING	15
Premium Pricing and Margin Expansion.....	15
FUNCTIONAL MARKET — SUPPLY-SIDE STAKEHOLDER VALUE CHAIN.....	16
<i>TABLE 6 GLOBAL NUTRACEUTICAL MARKET — BY STAKEHOLDERS, THROUGH 2016 (\$ MILLIONS)</i>	16
FUNCTIONAL MARKET —CONSUMER MARKET SEGMENTATION	16
Children/Teenager.....	17
Women.....	17
Men.....	17
Aging Boomers and Old Age	17
NONCOMMERCIAL FOOD PLACES — EARLY ADOPTERS.....	17
EVOLUTION OF FUNCTIONAL FBS MARKET.....	18
<i>FIGURE 2 EVOLUTION OF FUNCTIONAL FOOD AND BEVERAGE MARKET</i>	18
PHARMACEUTICAL COMPANIES AND FUNCTIONAL FOODS	19
<i>FIGURE 3 TARGET MARKET OVERLAP OF PHARMA AND FUNCTIONAL FOODS</i>	19
PHARMACEUTICAL COMPANIES ...(CONTINUED).....	20
CHAPTER FOUR: NUTRACEUTICALS MARKET- STRATEGIC INSIGHT	21
FUNCTIONAL FOOD, BEVERAGE, AND SUPPLEMENT MARKET DYNAMICS.....	21
<i>FIGURE 4 COMPARATIVE GROWTH ANALYSIS OF FUNCTIONAL FBS</i>	22
TRENDS AND OPPORTUNITIES	23
QUALITY PRODUCTS WITH IMPROVED HEALTH BENEFITS	23
FUNCTIONAL FOOD MAKEOVER OF EXISTING BRANDS WITH VITAMINS AND MINERALS.....	23
ENTRY INTO MAINSTREAM	23
PREMIUMIZATION	23

NEW PRODUCT DEVELOPMENT (NPD).....	24
LICENSING AND PARTNERING STRATEGIES	24
FOCUS ON WEALTHIER CONSUMERS	24
EXPLOITING NEW MARKETS AND DISTRIBUTION	24
CONSOLIDATION.....	24
VEGETARIAN AND ANTIALLERGEN PRODUCTS.....	25
SHORTENING THE LIFE CYCLE OF THE LAUNCH	25
SEEKING APPROVED HEALTH CLAIMS	25
CAPITALIZING ON NICHE MARKETS.....	25
PRIVATE LABELS IN THE FBS SPACE.....	25
MULTIPLE HEALTH BENEFITS.....	26
THE EMERGING CHILDREN'S MARKET	26
<i>TABLE 7 SELECTED NUTRITIONAL PRODUCTS LAUNCHED FOR</i>	
<i>CHILDREN</i>	26
BLOCKBUSTER PRODUCTS	27
<i>TABLE 8 SELECTED BLOCKBUSTER NUTRACEUTICAL PRODUCTS</i>	27
<i>TABLE 8 (CONTINUED)</i>	28
CONSOLIDATION IN FUNCTIONAL FBS MARKET	28
<i>TABLE 9 SELECTED MAJOR ACQUISITIONS IN FUNCTIONAL FBS</i>	
<i>MARKET</i>	29
<i>TABLE 9 (CONTINUED)</i>	30
<i>TABLE 10 SELECTED JOINT VENTURE/PARTNERSHIP</i>	
<i>AGREEMENTS</i>	31
<i>TABLE 10 (CONTINUED)</i>	32
CHAPTER FIVE: INGREDIENT MARKET	33
GLOBAL NUTRACEUTICAL FOOD MARKET BY INGREDIENT.....	33
<i>TABLE 11 GLOBAL NUTRACEUTICAL FOOD MARKET BY</i>	
<i>INGREDIENT, THROUGH 2016 (\$ MILLIONS)</i>	33
GLOBAL NUTRACEUTICAL BEVERAGE MARKET BY	
INGREDIENT.....	33
<i>TABLE 12 GLOBAL NUTRACEUTICAL BEVERAGE MARKET BY</i>	
<i>INGREDIENT, THROUGH 2016 (\$ MILLIONS)</i>	34
GLOBAL NUTRACEUTICAL SUPPLEMENT MARKET BY	
INGREDIENT.....	34
<i>TABLE 13 GLOBAL NUTRACEUTICAL SUPPLEMENT MARKET BY</i>	
<i>INGREDIENT, THROUGH 2016 (\$ MILLIONS)</i>	34
PROTEIN AND PEPTIDES	35
<i>TABLE 14 GLOBAL NUTRACEUTICAL PROTEIN MARKET BY</i>	
<i>PRODUCT TYPES, THROUGH 2016 (\$ MILLIONS)</i>	35
GLOBAL NUTRACEUTICAL PROTEIN MARKET BY	
PRODUCT TYPES.....	35
<i>TABLE 15 GLOBAL NUTRACEUTICAL PROTEIN-BASED FOOD</i>	
<i>MARKET BY PRODUCT TYPES, THROUGH 2016 (\$ MILLIONS)</i>	36
GLOBAL NUTRACEUTICAL PROTEIN MARKET BY REGION.....	36

<i>TABLE 16 GLOBAL NUTRACEUTICAL PROTEIN MARKET, BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	36
MAJOR MARKET DRIVERS	37
Sports Beverages Drive Protein Demand	37
Cost Pressure is Leading to More Innovation in Protein Ingredients	37
PROTEIN TYPES	38
Soy Protein.....	38
Whey Becoming Mainstream for Sports Drinks	39
Definition and Structure	39
Whey Products in Functional Beverages	39
Whey Used in Smoothies	40
Whey Proteins and Controlled Release of Bioactives.....	40
Whey Isolates for Weight Loss Market.....	40
Whey Protein Targeting Infant Nutrition	41
Amino Acids Finding a Niche Market within Proteins.....	41
Other Protein Sources	41
<i>TABLE 17 SELECTED OTHER MAJOR PROTEIN PRODUCTS</i>	42
PROBIOTICS/PREBIOTICS	43
DEFINITION AND STRUCTURE	43
<i>TABLE 18 GLOBAL NUTRACEUTICAL PROBIOTIC MARKET BY PRODUCT TYPE, THROUGH 2016 (\$ MILLIONS)</i>	44
GLOBAL NUTRACEUTICAL PROBIOTIC FOOD MARKET BY PRODUCTS.....	44
<i>TABLE 19 GLOBAL NUTRACEUTICAL PROBIOTIC FOOD MARKET BY FOOD PRODUCT, THROUGH 2016 (\$ MILLIONS)</i>	45
GLOBAL NUTRACEUTICAL PROBIOTIC MARKET BY REGION	45
<i>TABLE 20 GLOBAL NUTRACEUTICAL PROBIOTIC MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	45
PREBIOTICS	46
MARKET DRIVERS.....	46
Probiotics Benefit People with Particular Needs	46
Innovative Packaging Leads to More Use of Probiotics in Nondairy Products	46
Probiotic-Based Foods and Beverages Gain Popularity.....	47
<i>TABLE 21 COMPETITIVE OUTLOOK</i>	47
OMEGA-3.....	48
DEFINITION AND STRUCTURE	48
<i>TABLE 22 GLOBAL NUTRACEUTICAL OMEGA MARKET BY PRODUCT TYPE, THROUGH 2016 (\$ MILLIONS)</i>	49
GLOBAL NUTRACEUTICAL OMEGA-3 MARKET BY REGION.....	49
<i>TABLE 23 GLOBAL NUTRACEUTICAL OMEGA MARKET BY GEOGRAPHY, THROUGH 2016 (\$ MILLIONS)</i>	49

GLOBAL NUTRACEUTICAL PROBIOTIC FOOD MARKET BY PRODUCTS.....	49
<i>TABLE 24 GLOBAL NUTRACEUTICAL OMEGA-3-BASED FOOD MARKET BY PRODUCTS, THROUGH 2016 (\$ MILLIONS)</i>	<i>50</i>
MARKET DRIVERS.....	50
Omega-3 Products Moving into Mainstream Markets.....	50
Higher Recommended Daily Intake (RDI) Could Boost Omega-3 Market.....	51
Consumers Shift Fat Strategy: Low Saturated Fat, No Trans Fat	51
FLAX AS AN ALTERNATIVE SOURCE FOR OMEGA-3.....	51
COMPETITIVE OUTLOOK	52
<i>TABLE 25 SELECTED NEW OMEGA-3 PRODUCTS</i>	<i>52</i>
FIBER.....	53
DEFINITION.....	53
<i>TABLE 26 GLOBAL NUTRACEUTICAL FIBER MARKET BY PRODUCT TYPES, THROUGH 2016 (\$ MILLIONS)</i>	<i>53</i>
GLOBAL NUTRACEUTICAL FIBER FOOD MARKET BY PRODUCTS.....	54
<i>TABLE 27 GLOBAL NUTRACEUTICAL FIBER FOOD MARKET BY PRODUCT, THROUGH 2016 (\$ MILLIONS)</i>	<i>54</i>
GLOBAL NUTRACEUTICAL FIBER MARKET BY REGION	54
<i>TABLE 28 GLOBAL NUTRACEUTICAL FIBER MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	<i>55</i>
Major Incumbents Focus on Fiber Market.....	55
WHOLE GRAINS: BECOMING MAINSTREAM.....	55
Breads and Food Bars: Major Product Category to Include Whole Grain.....	56
<i>TABLE 29 SELECTED MAJOR BREADS AND FOOD BARS PRODUCTS</i>	<i>56</i>
Whole Grain Products.....	56
<i>TABLE 30 SELECTED FIBER-BASED PRODUCTS</i>	<i>56</i>
Inhibitors in the Whole Grain Market.....	57
<i>TABLE 31 SELECTED WHOLE GRAIN PRODUCTS</i>	<i>57</i>
High-fiber Foods with Low Glycemic Index: Effects on Diabetes	58
Beta-glucan	58
COMPETITIVE OUTLOOK	58
GLUTEN-FREE FIBER.....	59
FIBER AS A SUGAR SUBSTITUTE.....	59
VITAMINS AND MINERALS	59
<i>TABLE 32 GLOBAL NUTRACEUTICAL VITAMIN AND MINERAL MARKET BY GEOGRAPHIC REGION, THROUGH 2016 (\$ MILLIONS)</i>	<i>60</i>

GENETICALLY MODIFIED (GM)-FREE AND ALLERGEN-FREE VITAMINS	60
OTHER PHYTOCHEMICALS MARKET	60
TABLE 33 GLOBAL NUTRACEUTICAL PHYTOCHEMICAL MARKET BY PRODUCT TYPE, THROUGH 2016 (\$ MILLIONS)	61
PHYTOCHEMICALS BLOCKBUSTERS	61
TABLE 34 GLOBAL NUTRACEUTICAL PHYTOCHEMICAL-BASED FOOD MARKET BY PRODUCT, THROUGH 2016 (\$ MILLIONS)	62
TABLE 35 GLOBAL NUTRACEUTICAL PHYTOCHEMICAL-BASED BEVERAGE MARKET BY PRODUCT, THROUGH 2016 (\$ MILLIONS)	62
TABLE 36 GLOBAL NUTRACEUTICAL PHYTOCHEMICAL MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)	63
PLANT STEROLS: TARGETING THE CHOLESTEROL MARKET	63
Definition and Structure	63
TABLE 37 SELECTED MAJOR PLANT STEROLS PRODUCTS	64
COMPETITIVE OUTLOOK	64
ANTIOXIDANTS	64
TABLE 38 SELECTED MAJOR ANTIOXIDANTS PRODUCTS	65
Antioxidants Market Is Growing and Enjoying Higher Premiumization	65
Best-selling Antioxidants	66
FIGURE 5 TOP SELLING ANTIOXIDANTS (%)	66
CHAPTER SIX: GLOBAL NUTRACEUTICAL FOOD	67
TABLE 39 GLOBAL NUTRACEUTICAL FOOD MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)	67
GLOBAL NUTRACEUTICAL FOOD MARKET BY CATEGORY — MARKET OVERVIEW	67
FIGURE 6 GLOBAL NUTRACEUTICAL FOOD MARKET BY CATEGORY IN 2010 (%)	68
FIGURE 6 (CONTINUED)	69
SUGAR AND CONFECTIONERY: \$ 13.2 BILLION MARKET	69
TABLE 40 GLOBAL CONFECTIONERY AND SUGAR REPLACEMENTS MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)	70
Global Confectionery and Sugar Replacements Market by Ingredients	70
TABLE 41 GLOBAL CONFECTIONERY AND SUGAR REPLACEMENTS MARKET BY INGREDIENT, THROUGH 2016 (\$ MILLIONS)	70
Confectionery with Vitamins and Minerals on Store Shelves	70

Dark Chocolate a Major Category for Total Global Sugar Confectionery Sales	71
Popular Confectionery Products	71
TABLE 42 SELECTED CONFECTIONERY PRODUCTS	71
Alternative Sweeteners	72
TABLE 43 SELECTED ALTERNATIVE SWEETENERS	72
Breakdown of Confectionery and Sugar Market by Geography and Major Ingredient	72
TABLE 44 GLOBAL PROTEIN-BASED CONFECTIONERY AND SUGAR REPLACEMENTS MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)	73
TABLE 45 GLOBAL PROBIOTIC-BASED CONFECTIONERY AND SUGAR REPLACEMENTS MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)	73
TABLE 46 GLOBAL OMEGA-3-BASED CONFECTIONERY AND SUGAR REPLACEMENTS MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)	73
BAKERY MARKET OVERVIEW: \$10.1 BILLION	74
TABLE 47 GLOBAL NUTRACEUTICAL BAKERY FOOD MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)	74
Bakery Market Overview by Product Types	74
TABLE 48 GLOBAL NUTRACEUTICAL BAKERY FOOD MARKET BY CATEGORY, THROUGH 2016 (\$ MILLIONS)	75
Global Nutraceutical Bakery Food Markets by Ingredients	75
TABLE 49 GLOBAL NUTRACEUTICAL BAKERY FOOD MARKET BY INGREDIENT, THROUGH 2016 (\$ MILLIONS)	75
Breads: A \$7 Billion Market.....	76
TABLE 50 GLOBAL NUTRACEUTICAL BREAD FOOD MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)	76
Global Nutraceutical Breads Market by Ingredients.....	77
TABLE 51 GLOBAL NUTRACEUTICAL BREAD FOOD MARKET BY INGREDIENT, THROUGH 2016 (\$ MILLIONS)	77
Global Fiber Breads Market.....	77
TABLE 52 GLOBAL NUTRACEUTICAL FIBER BREAD FOOD MARKET BY GEOGRAPH, THROUGH 2016 (\$ MILLIONS)	78
Global Nutraceutical Cookies and Crackers Market by Region — Market Overview	78
TABLE 53 GLOBAL NUTRACEUTICAL COOKIES AND CRACKERS FOOD MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)	79
Global Nutraceutical Cookies and Crackers Market by Types of Ingredients	79
TABLE 54 GLOBAL COOKIES AND CRACKERS FOOD MARKET BY CATEGORY, THROUGH 2016 (\$ MILLIONS)	79

High-Protein Pasta Suits Sports Market	80
SNACKS: \$8.8 BILLION MARKET	80
<i>TABLE 55 GLOBAL NUTRACEUTICAL SNACKS MARKET BY REGION THROUGH 2016 (\$ MILLIONS)</i>	81
Cereal Bars: Key Snack Food Product.....	81
Consumer Preference for Healthy Snacks.....	81
Functional Snacks Market by Ingredient.....	82
<i>TABLE 56 GLOBAL NUTRACEUTICAL SNACKS MARKET BY CATEGORY, THROUGH 2016 (\$ MILLIONS)</i>	82
Cereal Manufacturers Shifting to Snacks Market.....	82
Demand for Gluten-free Cereal Increasing	82
Whole Grain and Oat Cereals Driving the Cereal Market in Europe	83
Developing Countries Are Rapidly Growing Markets for Functional Snacks.....	83
Convenient Meals Potential Competitor for Functional Snacks.....	83
<i>TABLE 57 SELECTED TOP-SELLING FUNCTIONAL SNACK PRODUCTS</i>	83
Breakdown of Snacks Market by Region.....	84
<i>TABLE 58 GLOBAL NUTRACEUTICAL FIBER-BASED SNACKS MARKET BY GEOGRAPHY, THROUGH 2016 (\$ MILLIONS)</i>	85
SUPER FRUITS	85
<i>TABLE 59 GLOBAL FROZEN AND SPECIALTY FRUITS NUTRACEUTICALS MARKET BY CATEGORY, THROUGH 2016 (\$ MILLIONS)</i>	85
<i>TABLE 60 GLOBAL FROZEN AND SPECIALTY FRUITS NUTRACEUTICAL MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	86
Sweeteners, Syrups, and Jellies Are Main Forms of Functional Fruit.....	86
Popular Super Fruits.....	86
<i>TABLE 61 SELECTED SUPER FRUITS BY CONTENT</i>	87
<i>TABLE 62 SELECTED SUPER FRUIT PRODUCTS</i>	87
DAIRY NONDRINKABLE PRODUCTS: \$7.6 BILLION MARKET	87
<i>TABLE 63 GLOBAL NUTRACEUTICAL DAIRY MARKET BY CATEGORY, THROUGH 2016 (\$ MILLIONS)</i>	88
Probiotic Ice Creams Dominate Functional Ice Cream Products Segment	88
Dairy Companies Pursue Functional Margarines	89
Popular Functional Dairy Nondrinkable Products	89
<i>TABLE 64 SELECTED FUNCTIONAL DAIRY PRODUCTS</i>	89
FUNCTIONAL FLOUR MARKET	89

<i>TABLE 65 GLOBAL NUTRACEUTICAL FLOUR MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	90
MEAT AND POULTRY: NEGLECTED OPPORTUNITY.....	90
<i>TABLE 66 GLOBAL MEAT AND MEAT REPLACEMENTS NUTRACEUTICALS MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	90
Noncommercial Markets: Early Adopters of Functional Meat	91
Nonallergen Functional Meat to Find Increasing Market.....	91
New Alternative Food: Egg Replacement Ingredients/products	91
GLOBAL NUTRACEUTICAL BEVERAGE MARKET	91
GLOBAL NUTRACEUTICAL BEVERAGE MARKET BY PRODUCT CATEGORY	92
<i>FIGURE 7 GLOBAL NUTRACEUTICAL BEVERAGE MARKET BY CATEGORY IN 2010 (%)</i>	92
<i>FIGURE 7 (CONTINUED)</i>	93
GLOBAL NUTRACEUTICAL BEVERAGE MARKET BY REGION	93
<i>TABLE 67 GLOBAL NUTRACEUTICAL BEVERAGE MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	94
FRUIT AND VEGETABLE JUICES AND DRINKS	94
<i>TABLE 68 GLOBAL NUTRACEUTICAL FRUIT AND VEGETABLE JUICE MARKET BY GEOGRAPHY, THROUGH 2016 (\$ MILLIONS)</i>	95
<i>TABLE 69 SELECTED TOP-SELLING FUNCTIONAL JUICE PRODUCTS</i>	95
NONCARBONATED DRINKS	96
<i>TABLE 70 GLOBAL NONCARBONATED DRINKS MARKET BY CATEGORY, THROUGH 2016 (\$ MILLIONS)</i>	96
Global Functional Noncarbonated Drinks Market by Region	96
<i>TABLE 71 GLOBAL NONCARBONATED DRINKS MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	97
CSD Companies Shifting to Functional Beverages for Growth	97
Sports and Energy Drinks Now Mainstream and Leading Companies Are Chasing Market Growth	97
<i>TABLE 72 SELECTED TOP-SELLING FUNCTIONAL NONCARBONATED DRINKS</i>	98
Noncarbonated Drinks/Functional Water	98
Leading Beverage Companies Expanding Their Presence in the Functional Water Market.....	99
TEA AND COFFEE.....	99

<i>TABLE 73 GLOBAL TEA AND COFFEE NUTRACEUTICAL MARKET BY INGREDIENT CATEGORY, THROUGH 2016 (\$ MILLIONS)</i>	100
Global Tea and Coffee Nutraceutical Market by Region	100
<i>TABLE 74 GLOBAL TEA AND COFFEE NUTRACEUTICAL MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	100
Ready-to-drink Green Tea Goes Mainstream	101
Tea Market Is Rapidly Expanding in the U.S.	101
Weight Reduction Claims Will Fuel Black Tea Demand	101
RTD Tea and Coffee Marketed as Alternative to Carbonated Soft Drinks	101
Functional Tea Extracts Introduced in Functional Foods	102
Flavored Functional Tea Targets Specific Markets	102
Functional Coffee	102
Top-selling Functional Tea Products	102
<i>TABLE 75 SELECTED TOP SELLING PRODUCTS</i>	103
DAIRY AND DAIRY ALTERNATIVE DRINKS	103
<i>TABLE 76 GLOBAL DRINKABLE YOGURTS AND OTHER DAIRY DRINKS MARKET BY INGREDIENT, THROUGH 2016 (\$ MILLIONS)</i>	104
Global Drinkable Yogurt and Other Dairy Drinks Market by Region	104
<i>TABLE 77 GLOBAL DRINKABLE YOGURTS AND OTHER DAIRY DRINKS MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	104
Dairy Market Sees Functional Dairy Products as a Way to Safeguard Financial Bottom Line	105
<i>TABLE 78 SELECTED TOP-SELLING FERMENTED FUNCTIONAL DAIRY BEVERAGES</i>	105
<i>TABLE 79 SELECTED TOP-SELLING NONFERMENTED FUNCTIONAL DAIRY BEVERAGES</i>	105
<i>TABLE 80 SELECTED TOP-SELLING PROBIOTIC DRINKABLE YOGURTS</i>	106
Probiotic Yogurt and Other Dairy Drinks Market Overview by Region	107
<i>TABLE 81 GLOBAL PROBOITIC DRINKABLE YOGURTS AND OTHER DAIRY DRINKS MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	107
<i>TABLE 82 SELECTED FUNCTIONAL DAIRY ALTERNATIVE BEVERAGES — SOY MILK</i>	108
GLOBAL NUTRACEUTICAL SUPPLEMENT MARKET	108
<i>TABLE 83 GLOBAL NUTRACEUTICAL SUPPLEMENTS MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	108
GLOBAL NUTRACEUTICAL SUPPLEMENT MARKET BY INGREDIENT TYPE	109

<i>TABLE 84 GLOBAL NUTRACEUTICAL SUPPLEMENTS MARKET BY INGREDIENT TYPE, THROUGH 2016 (\$ MILLIONS)</i>	109
Calcium and Multivitamins: Major Mainstream Supplements	109
CHAPTER SEVEN: APPLICATIONS	110
<i>FIGURE 8 NUTRACEUTICAL GLOBAL APPLICATION MARKET, 2010 (%)</i>	110
<i>FIGURE 8 (CONTINUED)</i>	111
WEIGHT MANAGEMENT: \$20.7 BILLION MARKET.....	111
<i>TABLE 85 GLOBAL WEIGHT MANAGEMENT APPLICATION MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	112
FUNCTIONAL BREAKFAST/SNACKS DOING WELL IN WEIGHT MANAGEMENT SEGMENT.....	112
GUARANTEEING WEIGHT LOSS IS BLOCKBUSTER OPPORTUNITY	112
APPETITESUPPRESSION/ SATIETY PRODUCTS DOING BETTER	113
FUNCTIONAL FOOD MARKET TARGETING WEIGHT MANAGEMENT THROUGH MULTIPLE DIET PROGRAMS....	113
<i>TABLE 86 SELECTED TOP-SELLING PRODUCTS: WEIGHT MANAGEMENT</i>	114
BEST-SELLING INGREDIENTS	114
<i>TABLE 87 SUMMARY OF SELECTED NEW FUNCTIONAL INGREDIENTS</i>	115
<i>TABLE 88 SELECTED TOP-SELLING SATIETY/APPETITE SUPPRESSION PRODUCTS</i>	116
<i>TABLE 89 COMPETITIVE OUTLOOK</i>	117
<i>TABLE 89 (CONTINUED)</i>	118
DIGESTIVE HEALTH, GI, AND IMMUNITY: \$17.3 BILLION MARKET.....	118
<i>TABLE 90 GLOBAL GI APPLICATION MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	119
<i>TABLE 91 SELECTED BEST-SELLING GI PRODUCTS</i>	119
HEART HEALTH: \$19.8 BILLION MARKET	119
<i>TABLE 92 GLOBAL HEART HEALTH APPLICATION MARKET BY GEOGRAPHY, THROUGH 2016 (\$ MILLIONS)</i>	120
OMEGA-3, WHOLE GRAINS, AND ANTIOXIDANTS LEAD THE HEART HEALTH MARKET	120
<i>FIGURE 9 HEART HEALTH CLAIMS BY FUNCTIONAL INGREDIENT TYPES (%)</i>	121
<i>TABLE 93 SELECTED INGREDIENTS FOR HEART HEALTH</i>	121
<i>TABLE 94 SELECTED TOP-SELLING HEART HEALTH FUNCTIONAL PRODUCTS</i>	122

<i>TABLE 95 SELECTED HEART HEALTH FUNCTIONAL PRODUCTS BASED ON TARGETED APPLICATIONS</i>	122
ANTIAGING AND BEAUTY: \$8.9 BILLION	123
MARKET OVERVIEW	123
<i>TABLE 96 GLOBAL ANTIAGING AND BEAUTY APPLICATION MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	124
ALOE VERA TO DOMINATE FUNCTIONAL BEAUTY FOOD MARKET	124
<i>FIGURE 10 FUNCTIONAL FBS MARKET FOR BEAUTY (%)</i>	124
<i>FIGURE 10 (CONTINUED)</i>	125
<i>FIGURE 11 THE COSMECEUTICALS MARKET IN U.S. BY SEGMENT, 2010 (%)</i>	125
FUNCTIONAL FOODS INGREDIENTS FOR COSMECEUTICAL APPLICATIONS	126
<i>TABLE 97 SELECTED NEW FUNCTIONAL INGREDIENTS FOR BEAUTY APPLICATIONS</i>	126
<i>TABLE 98 SELECTED BEST-SELLING PRODUCTS</i>	127
<i>TABLE 99 SELECTED NEW FUNCTIONAL PRODUCTS BY BEAUTY APPLICATIONS</i>	127
SPORTS AND ENERGY: \$46.2 BILLION MARKET	127
<i>TABLE 100 GLOBAL SPORTS AND ENERGY APPLICATION MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	128
TOP-SELLING PRODUCTS.....	129
<i>TABLE 101 OTHER SELECTED SPORTS AND ENERGY PRODUCTS AND INGREDIENTS</i>	129
MANUFACTURERS EYE SPORTS AND ENERGY MARKET FOR BLOCKBUSTER POTENTIAL	130
SPORTS AND ENERGY DRINK COMPANIES TO FOCUS ON FEMALE CUSTOMERS.....	130
INCREASING OPPORTUNITIES FOR NEWER FORMULATIONS.....	130
ASIAN MARKET PROVIDES OPPORTUNITY FOR SPORTS DRINKS.....	130
REGULATORY ISSUES RESTRICT ENERGY PRODUCTS FOR CERTAIN CONSUMER SEGMENTS	131
TYPE 2 DIABETES	131
<i>TABLE 102 GLOBAL DIABETES APPLICATION MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	132
LOW GLYCEMIC (GI) FOOD AND VITAMIN C ARE GROWING AT HEALTHY RATE	132
<i>TABLE 103 SELECTED TOP-SELLING LOW-GLYCEMIC PRODUCTS</i>	133
GENERAL WELLNESS	133
<i>TABLE 104 GLOBAL GENERAL WELLNESS APPLICATION MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	134

GLUTEN-FREE/CELIAC DISEASE.....	134
MEMORY AND MENTAL HEALTH PRODUCT MARKET TAPPING MAINLY CHILDREN.....	134
<i>TABLE 105 GLOBAL MEMORY AND MENTAL HEALTH APPLICATION MARKET BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	135
<i>TABLE 106 SELECTED POPULAR MEMORY PRODUCTS</i>	135
CHAPTER EIGHT: INTERNATIONAL MARKETS.....	136
U.S. NUTRACEUTICALS MARKET.....	136
U.S. NUTRACEUTICAL PRODUCT MARKET OVERVIEW	136
<i>TABLE 107 U.S. NUTRACEUTICAL PRODUCT MARKET, THROUGH 2016 (\$ MILLIONS)</i>	136
U.S. NUTRACEUTICAL BEVERAGE MARKET OVERVIEW	137
<i>TABLE 108 U.S. NUTRACEUTICAL BEVERAGE PRODUCT MARKET, THROUGH 2016 (\$ MILLIONS)</i>	137
U.S. NUTRACEUTICAL FOOD MARKET OVERVIEW	137
<i>TABLE 109 U.S. NUTRACEUTICAL FOOD PRODUCT MARKET, THROUGH 2016 (\$ MILLIONS)</i>	138
U.S. NUTRACEUTICAL HEALTH APPLICATION MARKET OVERVIEW.....	138
<i>TABLE 110 U.S. NUTRACEUTICAL HEALTH APPLICATION MARKET, THROUGH 2016 (\$ MILLIONS)</i>	138
EUROPE'S NUTRACEUTICALS MARKET	139
EUROPE'S NUTRACEUTICALS PRODUCT MARKET OVERVIEW.....	139
<i>TABLE 111 EUROPE'S NUTRACEUTICALS PRODUCT MARKET, THROUGH 2016 (\$ MILLIONS)</i>	139
EUROPE'S NUTRACEUTICAL BEVERAGE MARKET OVERVIEW.....	139
<i>TABLE 112 EUROPE'S NUTRACEUTICAL BEVERAGE PRODUCT MARKET, THROUGH 2016 (\$ MILLIONS)</i>	140
EUROPE'S NUTRACEUTICAL FOOD MARKET OVERVIEW	140
<i>TABLE 113 EUROPE'S NUTRACEUTICAL FOOD PRODUCT MARKET, THROUGH 2016 (\$ MILLIONS)</i>	140
EUROPE'S NUTRACEUTICAL HEALTH APPLICATION MARKET OVERVIEW	141
<i>TABLE 114 EUROPE'S NUTRACEUTICAL HEALTH APPLICATION MARKET, THROUGH 2016 (\$ MILLIONS)</i>	141
JAPAN'S NUTRACEUTICAL MARKET	141
JAPAN'S NUTRACEUTICALS PRODUCT MARKET OVERVIEW.....	141
<i>TABLE 115 JAPAN'S NUTRACEUTICAL PRODUCT MARKET, THROUGH 2016 (\$ MILLIONS)</i>	142

JAPAN'S NUTRACEUTICAL BEVERAGE MARKET OVERVIEW.....	142
TABLE 116 JAPAN'S NUTRACEUTICAL BEVERAGE PRODUCT MARKET, THROUGH 2016 (\$ MILLIONS).....	142
JAPAN'S NUTRACEUTICAL FOOD MARKET OVERVIEW.....	143
TABLE 117 JAPAN'S NUTRACEUTICAL FOOD PRODUCT MARKET, THROUGH 2016 (\$ MILLIONS).....	143
JAPAN'S NUTRACEUTICAL HEALTH APPLICATION MARKET OVERVIEW	143
TABLE 118 JAPAN'S NUTRACEUTICAL HEALTH APPLICATION MARKET, THROUGH 2016 (\$ MILLIONS).....	144
CHAPTER NINE: FUNCTIONAL FOODS MARKET PATENT OVERVIEW	145
FUNCTIONAL FOODS MARKET PATENT ANALYSIS.....	145
GENERAL TRENDS.....	145
TABLE 119 NUMBER OF NUTRACEUTICALS PATENTS, 2003–2008.....	146
TRENDS BY APPLICATION	146
FIGURE 12 NUTRACEUTICALS PATENT FILED – BY HEALTH APPLICATIONS (%).....	146
FIGURE 12 (CONTINUED)	147
CHAPTER TEN: COMPANY PROFILES	148
ALPRO UK, LTD.	148
PRODUCTS	148
TABLE 120 ALPRO PRODUCT PORTFOLIO.....	148
TABLE 120 (CONTINUED).....	149
NEW PRODUCTS	149
STRATEGY.....	149
ATKINS NUTRITIONALS, INC.	150
TABLE 121 ATKINS NUTRITIONALS PRODUCTS.....	150
NEW PRODUCTS	150
STRATEGY.....	151
BOEHRINGER INGELHEIM	151
TABLE 122 BOEHRINGER INGELHEIM PRODUCTS.....	151
STRATEGY.....	151
BASF GROUP	152
TABLE 123 BASF GROUP PRODUCTS.....	152
NEW PRODUCTS	153
STRATEGY.....	153
BAYER HEALTHCARE AG	153
PRODUCTS	153
TABLE 124 BAYER HEALTHCARE PRODUCTS.....	154
STRATEGY.....	154
BIOGAIA AB	154
TABLE 125 BIOGAIA AB PRODUCTS	155

NEW PRODUCTS	155
STRATEGY.....	155
CADBURY.....	156
<i>TABLE 126 CADBURY PRODUCTS.....</i>	<i>156</i>
NEW PRODUCTS	157
STRATEGY.....	157
CARGILL, INCORPORATED	157
<i>TABLE 127 CARGILL PRODUCTS.....</i>	<i>158</i>
NEW PRODUCTS	158
STRATEGY.....	158
CLIF BAR & COMPANY.....	158
<i>TABLE 128 CLIF BAR & COMPANY PRODUCTS.....</i>	<i>159</i>
NEW PRODUCTS	159
STRATEGY.....	159
COCA-COLA COMPANY	160
<i>TABLE 129 COCA-COLA COMPANY PRODUCTS.....</i>	<i>160</i>
NEW PRODUCTS	161
STRATEGY.....	162
DAIRY CREST GROUP.....	163
<i>TABLE 130 DAIRY CREST GROUP PRODUCTS.....</i>	<i>163</i>
NEW PRODUCTS	163
STRATEGY.....	164
DANISCO A/S	164
<i>TABLE 131 DANISCO A/S PRODUCTS.....</i>	<i>165</i>
NEW PRODUCTS	165
STRATEGY.....	165
DANNON GROUP	166
<i>TABLE 132 DANNON GROUP PRODUCTS.....</i>	<i>166</i>
STRATEGY.....	166
DR. PEPPER SNAPPLE GROUP	167
PRODUCT PORTFOLIO	167
NEW PRODUCTS	167
STRATEGY.....	167
DSM NUTRITIONAL PRODUCTS.....	168
<i>TABLE 133 DSM NUTRITIONAL PRODUCTS.....</i>	<i>168</i>
NEW PRODUCTS	169
STRATEGY.....	169
GALENICA LTD.	170
<i>TABLE 134 GALENICA LTD. PRODUCTS.....</i>	<i>170</i>
STRATEGY.....	170
GENERAL MILLS, INC.	170
<i>TABLE 135 PRODUCTS.....</i>	<i>171</i>
NEW PRODUCTS	171
STRATEGY.....	171

GENERAL NUTRITION CENTER CORPORATION (GNC)	172
<i>TABLE 136 GENERAL NUTRITION CENTER PRODUCTS</i>	172
NEW PRODUCTS	173
STRATEGY	173
HANSEN NATURAL	173
<i>TABLE 137 HANSEN NATURAL PRODUCTS</i>	173
NEW PRODUCTS	174
HERBALIFE INTERNATIONAL OF AMERICA INC.	174
<i>TABLE 138 HERBALIFE INTERNATIONAL OF AMERICA INC.</i> <i>PRODUCTS</i>	175
NEW PRODUCTS	175
STRATEGY	175
INVERNESS MEDICAL NUTRITIONAL GROUP	176
<i>TABLE 139 INVERNESS MEDICAL NUTRITIONAL GROUP</i> <i>PRODUCTS</i>	176
STRATEGY	177
JOHNSON & JOHNSON	177
<i>TABLE 140 JOHNSON & JOHNSON PRODUCTS</i>	177
NEW PRODUCTS	178
STRATEGY	178
JORDAN'S CEREALS	178
<i>TABLE 141 JORDAN'S CEREAL PRODUCTS</i>	179
NEW PRODUCTS	179
STRATEGY	179
KELLOGG COMPANY	180
<i>TABLE 142 KELLOGG COMPANY PRODUCTS</i>	180
NEW PRODUCTS	180
STRATEGY	181
KRAFT	181
<i>TABLE 143 KRAFT PRODUCTS</i>	182
NEW PRODUCTS	182
STRATEGY	183
LONZA GROUP, LTD.	183
PRODUCTS	183
<i>TABLE 144 LONZA GROUP, LTD. PRODUCTS</i>	183
STRATEGY	184
MULLER DAIRY (U.K.), LIMITED	184
<i>TABLE 145 MULLER DAIRY PRODUCTS</i>	184
NEW PRODUCTS	184
STRATEGY	185
NBTY, INC.	185
<i>TABLE 146 NBTY, INC. PRODUCTS</i>	185
NEW PRODUCTS	186
STRATEGY	186

NESTLE U.K., LTD.	186
<i>TABLE 147 NESTLE U.K PRODUCTS</i>	<i>187</i>
NEW PRODUCTS	187
STRATEGY.....	187
NUTRACEUTICAL INTERNATIONAL CORPORATION.....	188
<i>TABLE 148 NUTRACEUTICAL INTERNATIONAL PRODUCTS</i>	<i>188</i>
NEW PRODUCTS	188
STRATEGY.....	189
OCEAN SPRAY CRANBERRIES, INC.	189
<i>TABLE 149 OCEAN SPRAY PRODUCTS</i>	<i>190</i>
NEW PRODUCTS	190
STRATEGY.....	191
PEPSICO	191
<i>TABLE 150 PRODUCTS</i>	<i>191</i>
NEW PRODUCTS	192
STRATEGY.....	193
SO GOOD INTERNATIONAL	193
<i>TABLE 151 SO GOOD INTERNATIONAL PRODUCTS</i>	<i>194</i>
NEW PRODUCTS	194
STRATEGY.....	194
SOLAE, LLC	195
PRODUCTS	195
<i>TABLE 152 SOLAE PRODUCTS</i>	<i>195</i>
STRATEGY.....	196
TWINLAB CORP.	196
<i>TABLE 153 TWIN LABORATORIES PRODUCTS</i>	<i>197</i>
NEW PRODUCTS	198
STRATEGY.....	199
UNITED BISCUITS.....	199
<i>TABLE 154 UNITED BISCUITS PRODUCTS</i>	<i>200</i>
NEW PRODUCTS	200
STRATEGY.....	200
WEETABIX, LIMITED.....	201
<i>TABLE 155 WEETABIX PRODUCTS</i>	<i>201</i>
NEW PRODUCTS	201
STRATEGY.....	202
YEO VALLEY FARMS (PRODUCTION), LTD.....	202
PRODUCTS	202
<i>TABLE 156 YEO VALLEY FARMS PRODUCTS</i>	<i>202</i>
NEW PRODUCTS	203
STRATEGY.....	203
APPENDIX I.....	204
PATENTS.....	204
<i>TABLE 157 UNITED STATES PATENTS</i>	<i>204</i>

<i>TABLE 157 (CONTINUED)</i>	205
<i>TABLE 157 (CONTINUED)</i>	206
<i>TABLE 157 (CONTINUED)</i>	207
<i>TABLE 157 (CONTINUED)</i>	208
<i>TABLE 157 (CONTINUED)</i>	209
<i>TABLE 157 (CONTINUED)</i>	210
<i>TABLE 157 (CONTINUED)</i>	211
<i>TABLE 157 (CONTINUED)</i>	212
<i>TABLE 157 (CONTINUED)</i>	213
<i>TABLE 157 (CONTINUED)</i>	214
<i>TABLE 157 (CONTINUED)</i>	215
<i>TABLE 157 (CONTINUED)</i>	216
<i>TABLE 158 EUROPEAN PATENTS</i>	216
<i>TABLE 158 (CONTINUED)</i>	217
<i>TABLE 158 (CONTINUED)</i>	218
<i>TABLE 158 (CONTINUED)</i>	219
<i>TABLE 158 (CONTINUED)</i>	220
<i>TABLE 158 (CONTINUED)</i>	221
<i>TABLE 158 (CONTINUED)</i>	222
<i>TABLE 158 (CONTINUED)</i>	223
<i>TABLE 159 JAPANESE PATENTS</i>	223
<i>TABLE 159 (CONTINUED)</i>	224
<i>TABLE 159 (CONTINUED)</i>	225
<i>TABLE 159 (CONTINUED)</i>	226
<i>TABLE 159 (CONTINUED)</i>	227
<i>TABLE 159 (CONTINUED)</i>	228
APPENDIX II.....	229
NANOTECHNOLOGY.....	229
<i>TABLE 160 SELECTED NANOTECHNOLOGY COMPANIES</i>	229
<i>TABLE 160 (CONTINUED)</i>	230
APPENDIX III	231
ACRONYMS.....	231