

THE **NUTRA** ECONOMIST

nutrifytoday

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India's Supplement Boom

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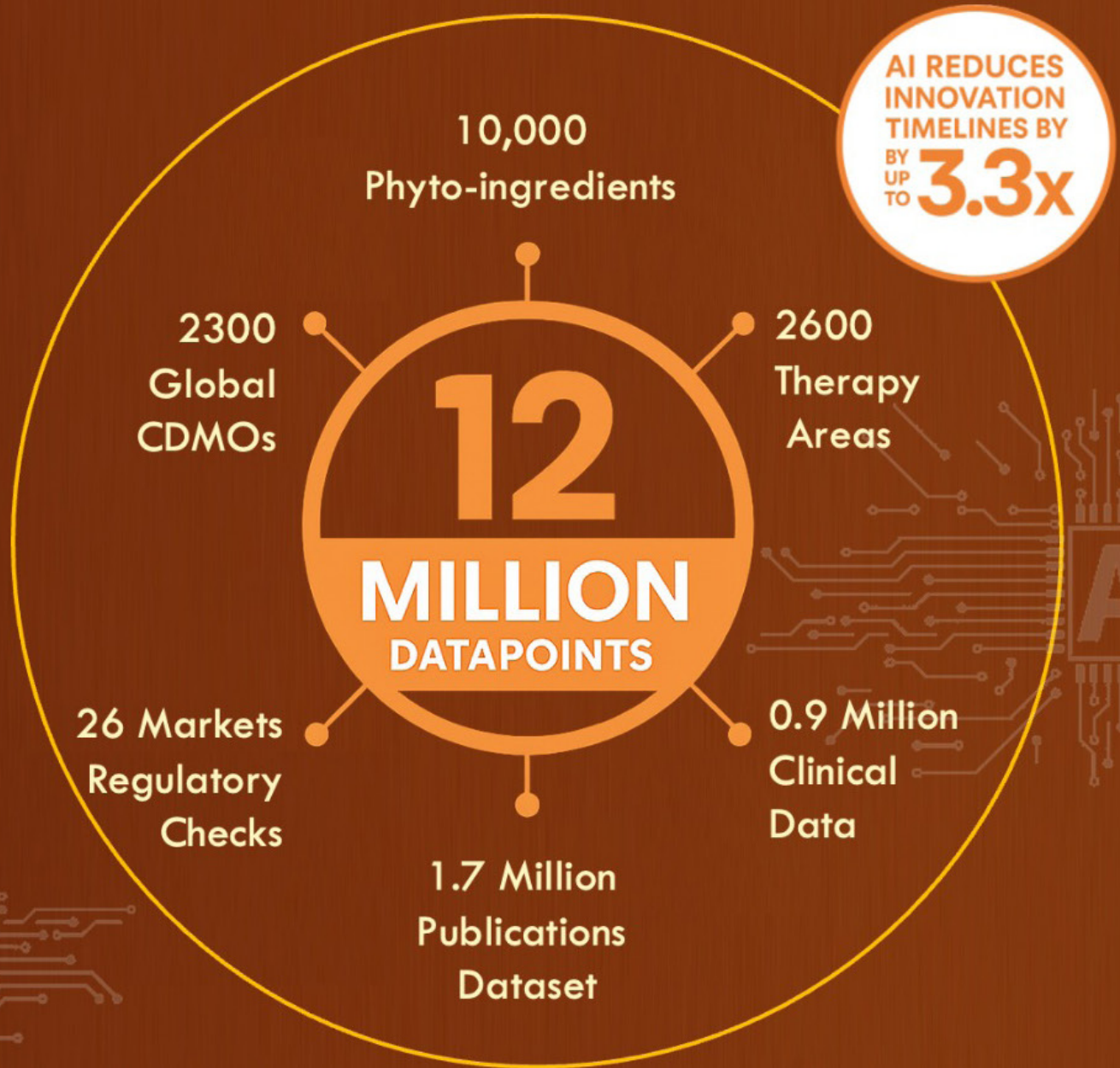
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FROM THE DESK OF CHAIRPERSON, NUTRIFYTODAY

Nutraceuticals Are Scaling. The Next Test Is Structural Depth.

The nutraceutical industry is no longer an emerging wellness story. It is becoming a serious business sector shaped by capital, science, regulation, and control of the value chain.

That is the context for this edition of *Nutraeconomist*.

Our cover theme asks a timely question: Is India's supplement boom a sign of category maturity, or simply early validation through strategic interest? The answer lies somewhere in between. Consumer demand is real. Strategic capital has noticed. But durable brand maturity across the sector is still uneven.

Over the last few years, India has moved decisively from proof-of-demand toward proof-of-exit. Venture capital helped build awareness and accelerate experimentation across protein, gut health, women's wellness, immunity, sleep, and beauty-from-within. What followed was inevitable: larger players began using acquisitions to enter faster, not because every brand had matured fully, but because the category had become too important to ignore.

The more important shift, however, is happening below the surface. Nutraceuticals are moving from a brand-led phase to an ecosystem-led phase. Long-term value will not sit only in consumer visibility. It will sit in formulation science, compliant claims, manufacturing quality, repeat purchase behavior, distribution strength, and trust.

In this category, trust is not a soft asset. It is the business model.

Consumers cannot always verify efficacy immediately. Regulation is evolving. Switching costs are low. That means enduring winners will be built on stronger scientific substantiation, better quality systems, sharper positioning, and more reliable outcomes. The market is beginning to reward depth, not just noise.



PRIYANKA SRIVASTAVA

Chairperson, NutriflyToday

This shift is also visible globally. In Vietnam, for example, supplement consumers are shaped at once by digital influence, pharmacy confidence, social commerce, and value sensitivity. That hybrid pattern shows where the future is headed: success will come from ecosystem agility, not channel dependence.

Even product narratives are evolving. Protein remains dominant, but newer conversations around fiber, gut health, and metabolic balance suggest the industry is shifting from visible performance to everyday preventive health. That is not a passing trend. It is a strategic reorientation.

At Nutrifly Today, we believe industries scale when leadership, science, policy, and commerce move together. This year's SumFlex reflects that belief, with Mumbai hosting C-Suite, R&D Grail, and Founders Day; Delhi focusing on policy and regulatory dialogue; and Tashkent advancing the CIS trade corridor conversation.

The message is simple: nutraceuticals are scaling, but their foundations are still being built. The next decade will belong not to those who market fastest, but to those who build deepest.

Enjoy reading this insightful edition of *Nutraeconomist*, where beyond these themes, we bring you many more perspectives, signals, and ideas shaping the future of responsible nutrition.

India's Supplement Boom

Strategic Validation or a Structural Reality Check?



NutrifyToday Analytical Insight

India's nutraceutical sector is no longer a peripheral wellness narrative; it has entered the boardroom. Over the past 24–36 months, a distinct pattern has emerged: large FMCG companies acquiring digital-first supplement brands, pharmaceutical players entering preventive health through strategic stakes, and private equity increasingly backing ingredient, CDMO, and platform businesses.

At first glance, this appears to be a textbook validation of category maturity.

At NutrifyToday, our assessment is more nuanced.

This is not yet a mature market. It is a market transitioning from consumer excitement to institutional structuring.

The signal behind the noise

Recent transactions have been interpreted as a vote of confidence in startup-led supplement brands. However, a closer examination reveals a different strategic intent.

What incumbents are acquiring is not just revenue; it is:

- Speed to consumer relevance
- Pre-built digital demand engines
- Access to emerging health need-states

In effect, large players are **buying time, not just brands.**

This distinction matters. It indicates that while demand has been validated, the capability to build such demand efficiently and repeatedly still resides outside traditional incumbents.

The three-layer capital shift

The evolution of capital deployment in India's nutraceutical ecosystem provides a clear lens into where the industry stands.

1. Venture Capital: Category Creation

The first wave of capital built awareness. It financed experimentation across formats—gummies, effervescents, plant proteins, beauty supplements—and drove consumer adoption through digital channels.

However, this phase prioritized **speed over sustainability.**

2. Strategic Capital: Market Entry Acceleration

FMCG and pharma companies have now stepped in—not to validate the existence of the category, but to accelerate their participation in it.

They recognize that preventive health is no longer optional adjacency—it is a core growth pillar.

3. Private Equity: Structural Control

The most telling shift is happening quietly. Capital is moving downstream:

- Into CDMO and manufacturing
- Into ingredient innovation platforms
- Into formulation science and IP-backed assets

This is where long-term value is expected to compound.

The central tension: scale vs. sustainability

India's supplement startups have demonstrated an ability to scale rapidly. Yet, the industry faces a structural tension:

Revenue growth has outpaced the development of durable economic and scientific moats.

Key challenges persist:

- Inconsistent repeat purchase behaviour
- High dependence on digital acquisition
- Limited differentiation at formulation level
- Variable regulatory discipline

This explains why many brands are being acquired before they fully mature as independent, cash-generating entities.

From branding to “trust infrastructure”

The next phase of growth in nutraceuticals will not be led by marketing innovation alone. It will be defined by what NutriflyToday terms as “**trust infrastructure.**”

This includes:

- Clinically substantiated formulations
- Transparent and compliant claims architecture
- Robust supply chain and manufacturing quality
- Integration with medical and pharmacy ecosystems
- Consistency in consumer outcomes

In a category where the end consumer cannot immediately validate efficacy, **trust becomes the primary currency.**

And trust cannot be built on branding alone.

Regulatory undercurrents: shaping the next decade

India's regulatory environment continues to evolve, particularly around claims, labeling, and the boundary between food and therapeutic intervention.

For the industry, this introduces both constraint and opportunity:

- Constraint, in limiting exaggerated positioning
- Opportunity, in rewarding scientifically credible players

Over time, this will likely lead to a bifurcation of the market:

- High-trust, compliance-driven brands with premium positioning
- Low-barrier, commoditized offerings competing on price and visibility

The convergence thesis

NutrifyToday views the Indian nutraceutical sector not as a standalone industry, but as a convergence layer between:

- FMCG (distribution and brand scale)
- Pharma (credibility and compliance)
- Preventive healthcare (consumer demand)
- Advanced manufacturing (quality and scalability)

The winners of the next decade will not belong exclusively to one domain. They will be hybrid institutions capable of operating across all four.

Where the smart capital is moving

Based on current trajectories, the most compelling investment opportunities lie in:

High conviction areas

- Ingredient platforms with proprietary science
- Botanical extracts with global relevance
- CDMO and high-quality manufacturing ecosystems
- Integrated omnichannel platforms with repeat-led growth

Selective opportunities

- Science-led brands with strong retention and offline expansion
- Focused category leaders in metabolic, gut, and women's health

Areas requiring caution

- Single-SKU, influencer-driven brands
- Marketing-heavy models with weak differentiation
- Businesses built on aggressive or ambiguous claims

NutrifyToday's perspective: invest, but with discipline

India's nutraceutical sector has clearly crossed proof-of-demand and is now entering proof-of-exit. However, it has not yet fully achieved proof-of-durable, independent brand maturity.

For investors and industry leaders, this creates a rare window:

- Early enough to capture disproportionate upside
- Mature enough to identify structural winners
- Complex enough to punish undisciplined capital

Closing insight

The current wave of strategic acquisitions should not be mistaken for the end of the story.

It is, in fact, the beginning of a more demanding phase.

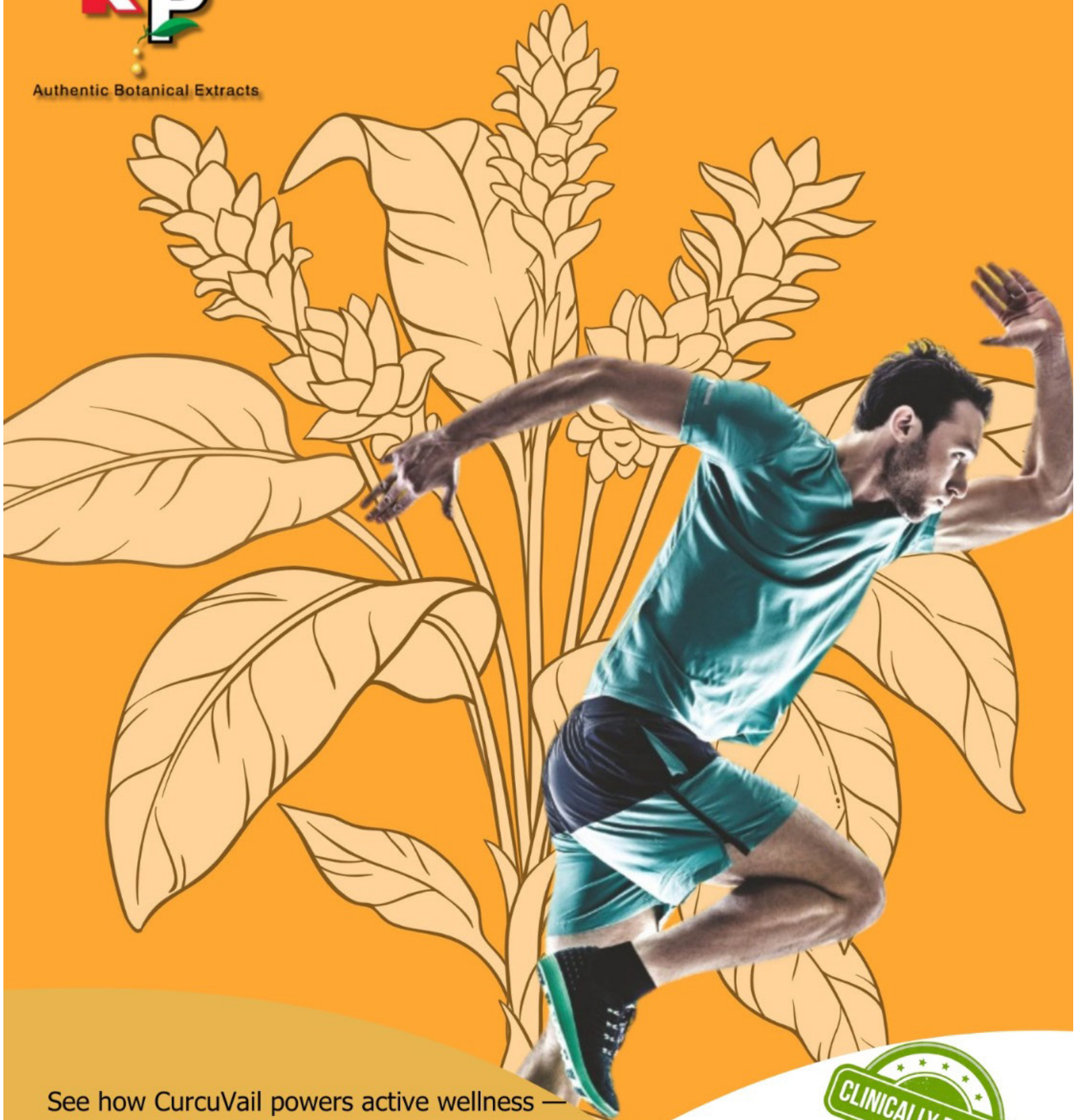
India's nutraceutical boom is real—but the real winners will emerge not from who scaled fastest, but from who builds the deepest trust, the strongest science, and the most controlled value chain.

At NutrifyToday, we believe this is the decade where nutraceuticals will transition from a consumer trend to a credible pillar of global healthcare and India has the opportunity to lead that transformation, provided capital aligns with capability.





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Vietnam's Nutraceutical Market: Where Supply Chain Strategy Meets Consumer Behavior

Vietnam is no longer an emerging opportunity in nutraceuticals it is becoming a strategic growth market shaped by a unique interplay of demographics, digital acceleration, and trust-driven consumption. With a population crossing 100 million, a median age in the early 30s, and rising health awareness, the country is transitioning from occasional supplement usage to habitual consumption.

Yet, the real story is not just growth. It is how the market is structured and how consumers decide what to buy, where to buy, and whom to trust.

A Market Built on Hybrid Channels

Vietnam's nutraceutical ecosystem operates on a multi-channel architecture, where no single route to consumer dominates.

Pharmacies remain the backbone of trust.

The pharmacy retail sector continues to expand steadily, with organized chains scaling aggressively across urban and semi-urban regions. For categories such as prenatal nutrition, bone health, and elderly care, pharmacies are not just retail points; they are decision influencers, often supported by pharmacist recommendations and perceived medical credibility.

E-commerce is the scale engine.

Vietnam's e-commerce market is growing at over 25% annually, driven by platforms such as Shopee and TikTok Shop. These platforms have transformed accessibility, enabling consumers to compare, evaluate, and purchase supplements with unprecedented convenience.

Social commerce is the growth disruptor.

TikTok, in particular, has reshaped consumer journeys. With tens of millions of active users and rapid adoption of livestream selling, supplements are no longer just products; they are content-driven purchases. Discovery happens through influencers, education is embedded in short-form video, and conversion is often instantaneous.

The result is a market where discovery, validation, and purchase are fragmented across channels; but deeply interconnected.

The Consumer Decision Hierarchy

Vietnamese consumers do not follow a linear buying journey. Instead, their decision-making reflects a layered hierarchy:

Discovery is digital-first.

Social media and online platforms dominate the initial touchpoint. Consumers are exposed to products through influencers, peer recommendations, and algorithm-driven content.

Validation is social and informational.

Reviews, ratings, and user feedback are the most influential decision drivers. Clear product information, transparency about ingredients, and brand credibility significantly impact purchase intent.

Trust remains non-negotiable.

Despite digital adoption, a large proportion of consumers still seek reassurance—often consulting pharmacists or healthcare professionals before making final decisions, especially for health-critical categories.

Price is secondary to perceived authenticity. Affordability matters, but it does not override trust. Vietnamese consumers demonstrate a clear willingness to pay for products that appear credible, well-reviewed, and professionally endorsed.

Channel Preference: A Structured Reality

Vietnam's consumer behavior reveals a distinct channel hierarchy:

- Online pharmacies and pharmacy-linked platforms lead for health-sensitive purchases, combining convenience with perceived medical reliability.
- Social media platforms drive discovery and impulse buying, particularly among younger consumers.
- Brand-owned websites serve as credibility anchors but are not primary transaction channels.
- Marketplaces provide scale, assortment, and price comparison but rely heavily on reviews and seller reputation to convert.

This hierarchy highlights a critical insight: Vietnam is not a price-first market—it is a trust-first market operating within a digital ecosystem.

Supply Chain Implications: From Distribution to Orchestration

For nutraceutical companies, Vietnam demands a shift from traditional distribution thinking to channel-specific supply chain design.

Products marketed through social commerce must be optimized for:

- Visual appeal and storytelling
- Fast-moving inventory cycles
- Repeat purchase behavior

Products sold through pharmacies must emphasize:

- Clinical positioning and clear claims
- Compliance and authenticity
- Professional endorsement

At the same time, marketplaces require:

- Competitive pricing strategies
- Strong review management
- Reliable fulfillment and availability

In effect, brands must operate three synchronized supply chains—content-led, commerce-led, and trust-led.

The Emerging Consumer Segments

Vietnam's growth is also being shaped by distinct consumer cohorts:

- Urban young adults driving demand for immunity, energy, beauty, and gut health
- Women consumers fueling the rapid rise of collagen and nutricosmetics
- Young families prioritizing prenatal and pediatric nutrition through pharmacy channels
- Aging population and caregivers expanding demand for bone, joint, and cardiovascular support

This segmentation reinforces the need for precision targeting rather than broad-market strategies.

The Strategic Reality

Vietnam's nutraceutical market is not simply expanding; it is evolving structurally.

It is a market where:

- Digital drives discovery
- Marketplaces drive scale
- Pharmacies drive trust

The companies that will succeed are not those that enter with products alone, but those that design integrated go-to-market systems—aligning content, commerce, and credibility into a unified strategy.

Final Insight

Vietnam is emerging as a high-velocity nutraceutical economy, where culture, technology, and consumer awareness converge.

The opportunity is clear; but so is the complexity. Success in Vietnam will not be defined by presence. It will be defined by precision in execution across channels and deep alignment with how consumers actually buy.

Asean nutraceuticals: enormous opportunity. Zero room for assumptions

As awareness of the link between diet and long-term wellbeing deepens, consumers globally are actively seeking out health-focused products, with nutraceuticals moving into the mainstream - and demonstrating a clear willingness to invest in quality and efficacy over price alone.

Asia Pacific carries substantial nutraceutical growth potential - a trajectory underpinned by expanding populations, ageing populations, an informed younger demographic, digitally connected and rising health literacy, with surging consumer demand across markets, including China.

The ASEAN nutraceutical market is projected to reach \$14.8 billion by 2031 at a CAGR of 8.4%, and approximately 40% of the region's 647 million people already consume nutraceuticals daily. The growth is real. So is the complexity.

"The 10 countries that comprise the ASEAN region reflect cultural and regional diversity regarding food, health status, nutrition requirements, and language," requiring astute and deep understanding of each market, ahead of entry and marketing in order to make an impact. And that goes for China too.

Several categories are driving momentum: healthy ageing including cardiovascular health, women's health including beauty from within, gut and immune health, and sports nutrition, from which inspiration can be drawn for daily vitality. Post-pandemic, immunity and preventive health have become permanent consumer priorities.

But the defining insight for any brand entering this region is this: ASEAN is not one market. It is ten distinct ones, plus China, each shaped by different cultural nuances, languages, religion, familial values, economic reality, age profile, and a deeply held relationship with traditional medicine.

Malaysia is a good example of multi-cultural needs in one country alone with three distinct core cultures - Chinese, Malay and Indian communities, all holding different ingredient expectations. The nutraceutical implication is significant.

A single Malaysian market requires navigating halal certification for Muslim consumers, vegetarian and vegan formulations for Hindu communities, traditional Chinese medicine conventions for Chinese consumers, and indigenous wellness traditions in East Malaysia - often simultaneously, within the same product range.



GILLIAN FISH

Founder & CEO, The 6AM Agency

It is one of the best illustrations of why "one ASEAN strategy" simply does not exist in practice.

The brands winning in ASEAN have built their market position on four non-negotiable foundations: a clearly defined brand strategy that resonates across diverse cultural landscapes; science-backed branded ingredients that provide credible, defensible proof points; Key Opinion Leaders and healthcare practitioners engaged as trusted advocates at point of influence; and education-led communications that deliver genuine value to their audiences rather than simply amplifying a sales message.

In China, an additional and formidable dimension comes into play - a digital ecosystem that is decades ahead of most global markets, where live streaming commerce, AI-driven personalisation, KOL-powered social selling, and platforms such as Alibaba, and Douyin have fundamentally transformed how consumers discover, evaluate, and purchase health products.

In this environment, digital fluency is not a marketing advantage - it is a commercial prerequisite. In a region this complex, this digitally sophisticated, and this competitive, these foundations are not strategic options. They are the entry conditions for sustainable market success. They set the benchmark for what is to come in nutraceuticals purchase and consumption across the globe in other markets - the future is on our doorstep

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Is Fiber the Next Protein?

Why the Supplement Industry's Biggest Opportunity in a Decade Is Already Hiding in Plain Sight

When PepsiCo CEO Ramon Laguarta publicly declared “fiber will be the next protein” on an earnings call, most people in the food and beverage world sat up and paid attention. In our industry — supplements — we should be paying even closer attention. Because if this prediction holds, we are sitting at the beginning of a macro shift that rivals the protein revolution of the 2010s.

I have spent 15 years in nutraceuticals, across sports nutrition, OTC pharma, and consumer wellness. In that time, I have watched protein go from a niche gym ingredient to a billion-dollar mainstream category that reshaped the entire supplement shelf. Fiber, I believe, is next. And unlike the protein wave — which rode on aspirational aesthetics — the fiber wave is being driven by something more durable: chronic disease prevention, gut science, and a public health crisis hiding in plain sight.

The Deficiency Nobody Is Talking About

Let us start with a number that should alarm every professional in this space: approximately 97% of men and 90% of women in the United States do not meet the recommended daily intake of dietary fiber (US Dietary Guidelines 2020–2025; Frontiers in Nutrition, 2025). The recommended range is 25–38 grams per day for adults under 51, yet average American intake hovers around 12–14 grams — less than half the requirement (RMIT University, Food Research International, 2025). European populations fare slightly better at 18–24 grams, but still fall short.

In India, the picture is complicated by the assumption that our traditionally plant-rich diet protects us. It largely did — until urbanisation changed everything. Rapid shifts toward processed and refined carbohydrates, reduced legume and vegetable consumption in working-age urban adults, and calorie-dense low-fiber convenience foods have created a growing fiber gap. Surveys indicate that up to 25–30% of urban adults in India already report frequent digestive issues (Persistence Market Research, 2025). The gut is signalling distress. The industry has not fully responded.



MANEESH SINGH

Category Lead- Consumer Products
IMG

“

In the countries surveyed -Europe, the USA ; every single population had a deficiency of fiber. Considering fiber is one of the most important nutrients, this is extremely worrying.

Prof. Raj Eri, RMIT University,
Food Research International, 2025

”

The Science Is No Longer Ambiguous

Fiber has always had a credibility problem in the supplement world. It was considered too “food” to be a supplement, too unsexy to be marketed effectively, and too broad to carry a specific health claim.

That is changing rapidly, as the research base has become substantial enough to be impossible to ignore.

An umbrella review published in 2025, analysing 33 meta-analyses covering over 17.1 million individuals, found that 76% of studies reported significant inverse associations between higher fiber intake and disease risk. Convincing evidence (Class I) was identified for cardiovascular disease mortality, pancreatic cancer, and diverticular disease. Highly suggestive evidence (Class II) supported associations with all-cause mortality, coronary heart disease, and ovarian cancer (ScienceDirect, 2025).

A Global Burden of Disease analysis across 204 countries (1990–2019) confirmed that a diet low in fiber — defined as below 23.5 g/day from all plant sources — is significantly associated with increased burden from type 2 diabetes, stroke, colorectal cancer, and ischaemic heart disease. These are not rare conditions. They are the dominant killers of the urban Indian middle class.

The mechanism is no longer a black box. Dietary fiber — particularly fermentable, soluble prebiotic fibers like inulin, FOS, and GOS — feeds gut bacteria that produce short-chain fatty acids (SCFAs), primarily butyrate. Butyrate is the primary energy source for colonocytes (the cells lining the colon), supports gut barrier integrity, modulates inflammation, and is linked to improved insulin sensitivity. The gut microbiome is the machinery; fiber is the fuel.

The GLP-1 Connection: Fiber’s Most Powerful New Narrative

Nothing has accelerated mainstream interest in fiber more than the GLP-1 revolution. Semaglutide (Ozempic, Wegovy) and tirzepatide (Mounjaro) have fundamentally changed how the world thinks about appetite and metabolic health. But here is what the supplement industry should understand: GLP-1 is not a drug invention. It is a gut hormone that your body makes naturally — and fiber triggers its release.

When fermentable fiber reaches the colon and is metabolised by gut bacteria into SCFAs, L-cells in the gut wall are stimulated to release GLP-1 and PYY — both satiety hormones. Research from the University of Arizona and the University of Nebraska-Lincoln (NPR/Shots, 2023) explains this as a “second meal effect”: fiber consumed at one meal influences satiety at the next. Ingredients like Fibersol-2 (a soluble corn-derived prebiotic fiber) have clinical data showing that 10 grams with a meal can increase GLP-1 as part of a normal physiological response in healthy individuals (ADM/Matsutani, 2023).

Product launches with ‘GLP-1’ on the label soared from under 100 in 2023 to over 3,000 in 2024 (Anova database, Vitafoods Europe 2025). Fiber — as a natural GLP-1 modulator — sits at the centre of this wave. Brands are already building narratives around “natural Ozempic” effects from psyllium, beta-glucan, and inulin. The science is nuanced (not all fibers act identically, and dose-response is fiber-type-dependent), but the consumer narrative is powerful and building.

It is important to be responsible here. The supplement industry must not overclaim. Fiber is not a drug. It does not suppress appetite the way semaglutide does. But it does support metabolic health, gut microbiome diversity, and natural satiety signalling — and those are honest, defensible, and valuable claims in a world where GLP-1 drugs cost thousands of dollars per month and remain inaccessible to most Indian consumers.

The Market Signals Are Aligning

The market data validates what the science predicts. The global fiber supplements market was valued at approximately USD 10.43 billion in 2025 and is projected to reach USD 18 billion by 2032 (Fortune Business Insights, 2025). The broader dietary fiber market is expected to grow from USD 10.5 billion to USD 22.1 billion by 2035, at a CAGR of 7.9%. India's fiber supplement market, while currently modest at approximately USD 0.38 billion in 2025, is projected to grow at a CAGR of 5.9% through 2035 — driven by urban health consciousness, metabolic health concerns, and e-commerce penetration (Future Market Insights, 2025).

Consumer interest is following the market trajectory. Datassential's 2026 Trends Report placed fiber as the leading health trend after protein, with 54% of consumers interested in high-fiber products — rising to 60% among Gen Z. The International Food Information Council (IFIC) 2025 Food & Health Survey found 64% of Americans actively trying to increase their fiber intake. Critically, consumer interest in fiber among younger consumers jumped by approximately 25% in 2025 compared to 2024 — **the first meaningful generational shift in 15 years.**

Market / Region	2025 Value	Projected Value	CAGR
Global Fiber Supplements	USD 10.43 Bn	USD 18.01 Bn (2032)	7.9%
Global Dietary Fiber (all forms)	USD 10.5 Bn	USD 22.1 Bn (2035)	7.9%
India Fiber Supplements	USD 0.38 Bn	~USD 0.65 Bn (2035)	5.9%
Asia-Pacific Gut Health Supp.	37.3% global share	USD 36.57 Bn (2033)	7.9%

Source: Fortune Business Insights 2025, Future Market Insights 2025, Grand View Research 2025

Beyond Soluble vs. Insoluble: A Smarter Framework

One reason fiber has underperformed as a supplement category is the oversimplification of its classification. For decades, we told consumers: soluble fiber lowers cholesterol, insoluble fiber keeps you regular. This is too blunt to drive meaningful supplementation behaviour.

A landmark 2025 paper from RMIT University published in Food Research International proposed a comprehensive new framework for classifying dietary fiber based on health outcomes rather than just physical solubility. As Prof. Raj Eri articulated: "Quite like how different medicines target different conditions, so too do different types of fibers." Apples and bananas are both fiber-rich, but their fibers work very differently in the gut.

For supplement formulators, this matters enormously. The choice of fiber ingredient — psyllium husk (viscous, cholesterol-lowering), inulin/FOS (prebiotic, microbiome-modulatory), beta-glucan (glycaemic control, cardiovascular), resistant starch

(butyrate production, colon health), or pectin (satiety, gut barrier) — should be driven by the intended health outcome. The era of a single "fiber" ingredient on a supplement label is over. Precision fiber formulation is the next frontier.

What This Means for the Indian Supplement Industry

India's supplement market has been built primarily on protein, vitamins, and minerals. Digestive health products have existed — mostly in the form of probiotics and ayurvedic churnas — but a science-backed, branded, consumer-friendly fiber supplement category is almost entirely absent.

This is a significant white space. The India gut health supplements market is already witnessing a shift toward prebiotic and synbiotic formulations, reflecting broader consumer preference for comprehensive digestive health solutions (IMARC Group, 2024). Urban consumers increasingly associate gut health with immunity, mental clarity, skin health, and metabolic wellness — all claims that fiber can legitimately support.

In my experience across Tata 1mg, HealthKart, and consulting through Navigate Healthcare Solutions, I observe a consistent pattern: Indian consumers are more aware of what they should be eating than what they should be supplementing. Fiber sits in a unique position — it straddles the food and supplement worlds. The most successful fiber products in India will likely be food-adjacent formats: sachets, functional beverages, fortified foods, and easy-to-consume daily powders rather than traditional supplement capsules.

The opportunity is also regulatory. FSSAI's framework for dietary fiber claims — while requiring substantiation — is workable with well-characterised ingredients. Branded ingredients like Fibersol-2, Orafit Inulin (BENEIO), and Cargill's Fibersol provide clinical dossiers that can support product claims. The supply chain for India is improving: psyllium, India's own primary fiber export to the world, remains one of the best documented fiber ingredients globally with an established Indian supply base.

The Risk: Hype Without Integrity

Having watched protein become a marketing battleground where label claims often outpaced the science, I want to flag a real risk for fiber. The GLP-1 adjacency narrative is powerful — but it is also easily misconstrued. Fermentable fiber can stimulate natural GLP-1 release through the microbiome-SCFA pathway, but this is mechanistically different from the pharmacological effects of semaglutide. Brands that position fiber supplements as “natural Ozempic” without appropriate nuance will face both regulatory scrutiny and consumer backlash when the weight loss results do not match drug-level expectations.

The honest and winning narrative is different: fiber is foundational nutrition that a vast majority of us are severely deficient in, it supports the gut microbiome that underpins immunity, metabolic health, and mental wellbeing, and it does so through safe, food-derived mechanisms backed by decades of robust evidence. That is a story worth telling — without embellishment.

Closing Thought

Protein had its moment when the world started going to the gym. Fiber will have its moment when the world starts taking its gut seriously — and that moment is arriving faster than most brands are prepared for.

The deficiency is real. The science is compelling. The market is inflecting. The question for every supplement brand, formulator, and category manager is not whether to build a fiber strategy — it is whether you will build it now, or spend the next five years playing catch-up.



Madhunashini (*Gymnema sylvestre*): The Ayurvedic “Sugar Destroyer” for Metabolic Health.

Gymnema sylvestre, commonly known as Madhunashini or Meshashringi, is a renowned Ayurvedic herb traditionally used to manage diabetes and metabolic disorders. Often called the “sugar destroyer,” this woody climbing plant grows in the dry forests of central and southern India and has been used in Ayurvedic formulations for centuries. The herb’s unique property lies in its ability to suppress the perception of sweetness. Its bioactive compounds gymnemic acids, gymnema saponins, and gurmarin temporarily bind to sweet taste receptors on the tongue, reducing the sensation of sweetness and helping curb sugar cravings. This mechanism also supports weight management and metabolic health.

Gymnema’s hypoglycemic effects occur through multiple pathways, including reducing intestinal glucose absorption, improving insulin function, enhancing peripheral glucose utilization, and supporting pancreatic β -cell regeneration. While it is effective on its own, studies show that combining *Gymnema* with synthetic drugs such as metformin (a widely used antidiabetic drug) may alter drug bioavailability, highlighting the need for careful formulation.

Research on *Gymnema* has expanded significantly, with over 1,500 scientific publications exploring its potential in weight management, hyperlipidemia, and Polycystic Ovary Syndrome (PCOS). Recent studies also investigate its use in nanoparticle-based formulations to improve bioavailability and therapeutic activity.

Despite its strong pharmacological profile, *Gymnema* has low natural bioavailability, prompting research into advanced delivery systems such as encapsulation and nanoformulations. Today, standardized extracts rich in gymnemic acids are widely used in nutraceuticals, functional foods, and polyherbal formulations, positioning Madhunashini as a promising holistic metabolic modulator for modern health challenges.

TAHIRA HS

R&D Chief
GreenSpace Herbs

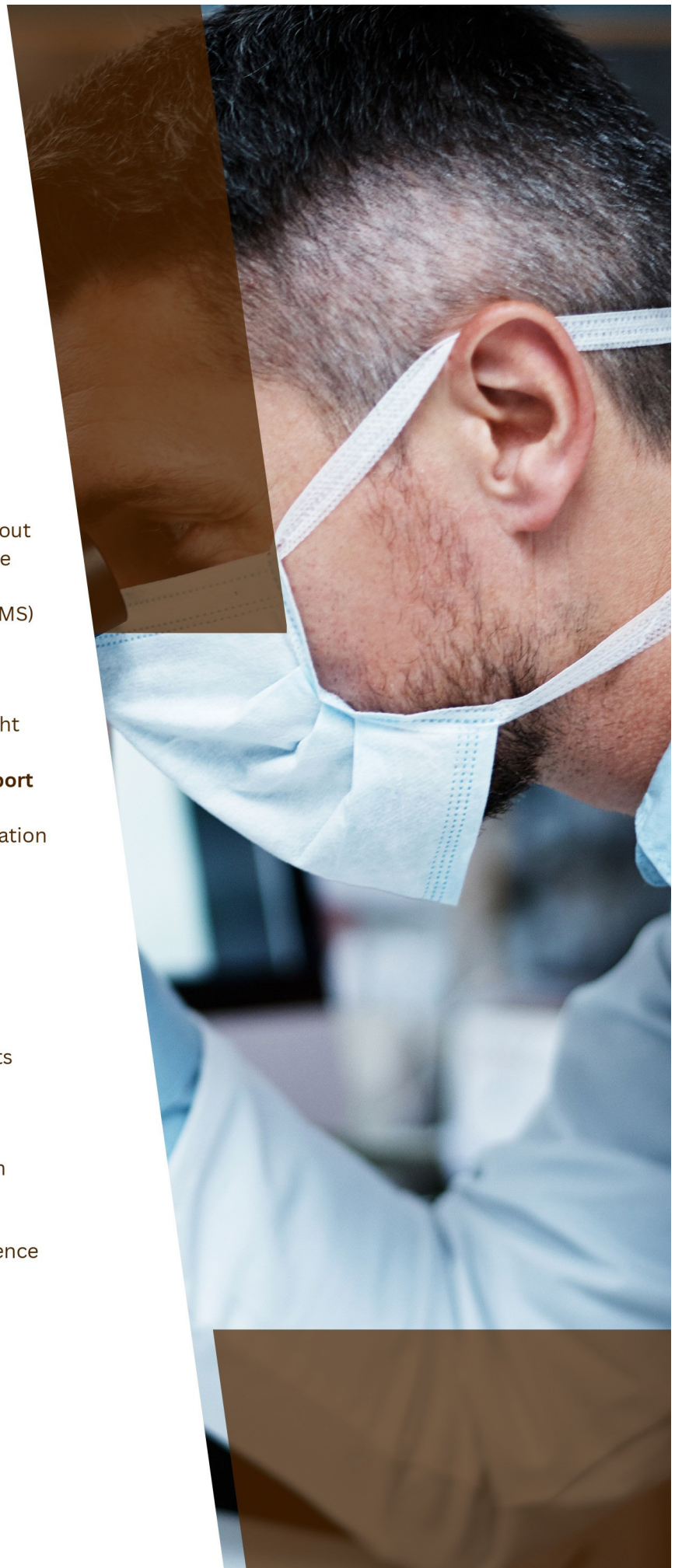




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The R&D Grail, Episode 4: “Sugar, Salt and Sensation: Reformulate Without Regret”

The fourth episode of “The R&D Grail”, a monthly webinar by Nutrify Today Academy, was conducted on 27th February, 2026. The discussion tackled one of the food industry’s most daunting challenges: reducing sugar and salt without losing the sensory experience consumers crave. Hosted by Dr. Muneeb U Rehman, Moderated by Dr. Balkumar Marthi and sponsored by GreenSpace Herbs Pvt. Ltd., the session explored whether reformulation is a true redesign of sensory experiences or merely a tactical adjustment to meet regulatory labels.

The Role of Salt and Sugar in Formulation

Moderator Dr. Balkumar Marthi opened the discussion by noting that salt and sugar are the “Holy Grail” of food formulation. They are not just flavor enhancers; they are critical for stability, texture, and moisture retention. Unlike simply masking an odor, replacing these pillars requires a deep understanding of their multi-functional roles in a product’s structure.

Mr. Subbarao Chinni, MD of Crius Companies, emphasized that taste remains the primary driver for market success. While health benefits are the goal, the consumer’s acceptance of a product relies heavily on the palate. Historically, industries like pharma relied on high sugar content (up to 65%) for both stability and taste in syrups, though this is rapidly changing toward a “zero added sugar” demand.

Professor Ganesh Bagler of IIT Delhi provided an evolutionary perspective, explaining that humans are biologically adapted to crave calorie-dense, sugar-rich foods from our days on the African savannah. Salt, meanwhile, has been used throughout history not just for flavor, but as a vital preservation tool to reduce water activity and keep food safe.

MODERATOR



Dr. Balkumar Marthi

President, NutrifyToday Academy
(ex-Unilever R&D; former Dean of Innovation,
GITAM University)

PANELISTS



Prof. Ganesh Bagler

IIT-Delhi, pioneered Computational Gastronomy, blending AI with food science on flavors, nutrition, health, and sustainability. From physics/Computer Science roots in gastronomy, Dr Bagler builds data tools to computably transform food.



Subbarao Chinni

MD Crius companies, 20+ years as MD of three pharma/nutraceutical firms, pioneering vegetarian soft gels. Expert in strategic innovation for accessible, high-quality health solutions.



Dr. Bridreth Khokhare

Chief Scientist & Founder, Science on wheels Bio Pvt Ltd, 15+ years of experience in nutraceutical R&D, formulation, regulatory affairs & IPR. Pioneered novel products in cancer nutrition, adaptogens, sports supplements, ayurceuticals & more. Leading innovator in wellness & criti-care nutrition.

The Drive for Reduction: Health vs. Habit

Dr. Bridreth Khokhare, Founder of Science on Wheels, described sugar as the “cheapest filler” that creates cravings and drives repeat sales. However, he noted that the industry is evolving to replace these “empty calories” with proteins, complex carbs, and healthy fats. This shift is supported by natural solutions like Stevia, Monk Fruit, and fiber-based bases that support gut health.

The panel agreed that scientific evidence linking overconsumption of salt and sugar to lifestyle disorders such as cardiovascular disease and diabetes is now undeniable. Prof. Bagler noted that regulatory agencies worldwide, including the FS-SAI and FDA, have accepted this evidence, leading to movements and taxes aimed at reducing these ingredients in processed foods.

The Consumer Dilemma and “Health by Stealth”

Dr. Marthi raised the concern of whether consumers are willing to pay more or compromise on taste. Dr. Bridreth responded that while Indian consumers are used to carb-heavy diets, post-COVID awareness has made them more conscious of gut health and nutrient density. However, they remain unwilling to compromise on the “home-cooked” taste they expect.

Mr. Subbarao observed that the “clean label” trend is now a major requirement for D2C brands. Consumers are actively checking labels for sodium and sugar content. To meet this without losing taste, the industry is employing technologies like taste masking and using peptides or natural flavors to counteract bitterness when sugar is reduced.

Emerging Technologies and AI

The future of reformulation lies in Computational Gastronomy. Prof. Bagler explained that by using data from tens of thousands of traditional recipes, researchers can identify flavor patterns that remain tasty with low salt and sugar. Furthermore, AI and machine learning are being used to mine “cheminformatics” data to find natural, low-calorie molecules that mimic the sensory qualities of sugar.

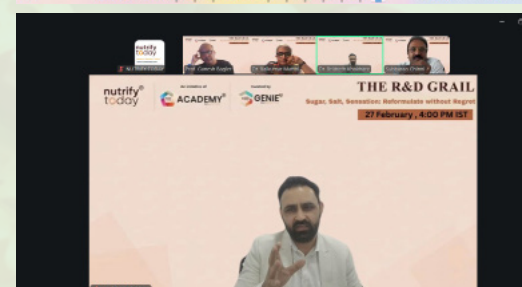
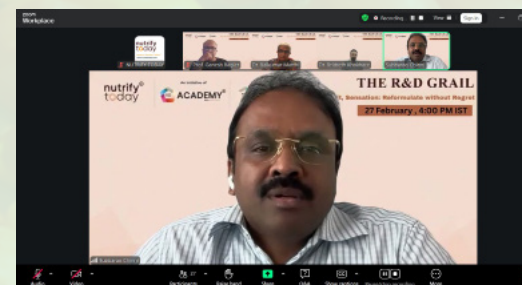
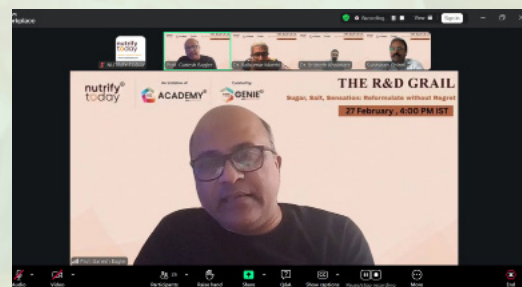
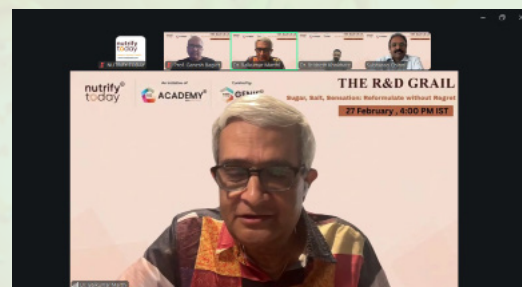
Dr. Bridreth shared clever formulation “tricks,” such as using citrate forms of magnesium and calcium to mimic the “note” of sodium chloride. He also highlighted the use of herbs to mask other herbs for example, using fenugreek to mask the bitterness of caffeine or polyphenols, ensuring a clean and functional end product.

The Regulatory Landscape

The discussion touched upon the role of the FS-SAI. Dr. Bridreth argued for a speedier mechanism to approve novel molecules already validated in Western markets, noting that India is sitting on a “gold mine” of phytoactives and Ayurvedic wisdom. Mr. Subbarao countered that while FS-SAI is stringent, it has evolved significantly in a short time and is open to industry feedback when regulations prove impractical.

A Harmonious Conclusion

In closing, Dr. Marthi compared the R&D process to an orchestra, where smart science allows for a “symphony” of health and taste. The experts concluded that while challenges remain, the combination of consumer sensitization and advanced data-driven formulation allows the industry to innovate boldly. As Dr. Muneeb summarized, the goal is clear: redesigning the food experience through science to ensure health without regret.



THE R&D GRAIL SHOW

EPISODE 5

 27 MARCH 2026 | 4PM - 5PM

Theme

From Data Overload to Precision Nutraceutical Formulation: Choosing the Right AI for R&D.

MODERATOR



Dr. Raktim Chattopadhyay

CEO, Esperer Group of Companies, Pioneering Nutraceutical Innovations for Non-Communicable Diseases, 20+ Years in Healthcare Industry.

PANELISTS



Dr. Nandan Joshi

Head - Medical & Scientific Affairs @ Dr. Reddy's
Experienced Leader with a demonstrated history of working in the FMCG & Nutraceuticals.



Dr Jean Francois Porrachia

Chief Scientific Officer in Himalaya Wellness Company. R&D leader in Consumer Healthcare (Cosmetic and pharmaceutical), with International experience (USA 7 Years).



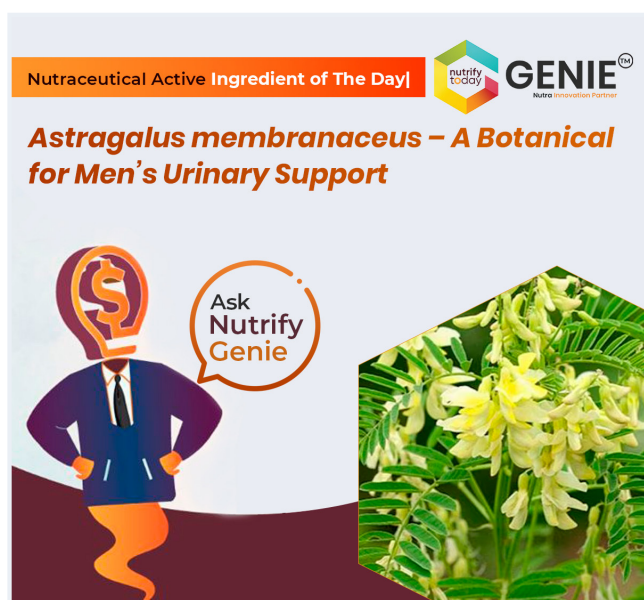
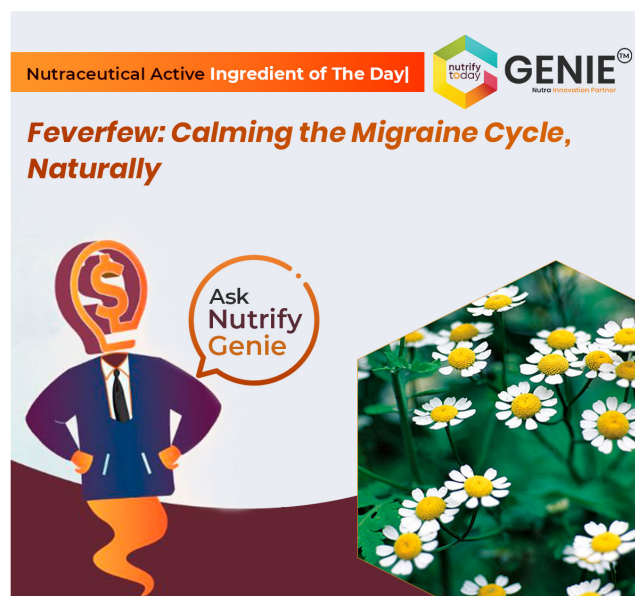
Dr. Baidyanath Mishra

Head-R&D Healthcare Research in Dabur India Limited, 24 Years in Innovation, patenting and product design natural products into Phyto-pharma, Nutraceuticals, Nutricosmetic, Orphan drugs and Global Regulatory intelligence.

INGREDIENTS OF THE MONTH

Feverfew is a well-known traditional herb valued for its role in migraine management and neurological comfort. Its benefits are linked to its ability to modulate serotonin (5-HT) receptor activity, a key pathway involved in migraine initiation and pain signaling. Clinical observations show that feverfew supplementation can help reduce the frequency, intensity, and duration of migraine attacks, while also supporting overall well-being, including improved physical performance and reduced anxiety. With a history of traditional use and growing scientific support, feverfew stands out as a natural, well-tolerated botanical for ongoing migraine prevention and head pain support.

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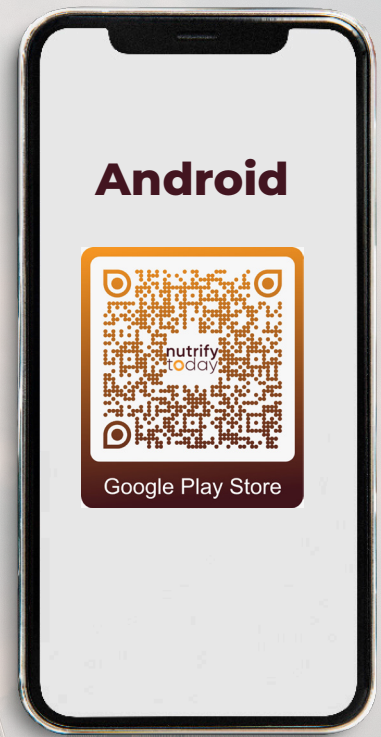
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