

OPPORTUNITIES FOR SOUTH AUSTRALIA IN VITAMIN D

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FUNCTIONAL FOODS

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This fact sheet presents a high level summary of the opportunities for South Australia in the production of vitamin D, drawn from the Functional and Luxury Foods Research Project.



There is significant interest in Australia regarding vitamin D due to our aging population. The health benefits from consumption of vitamin D is well established and accepted by Australian consumers. In 2014 the estimated value of the domestic vitamin D market was USD8.5 million. The compound annual growth rate is estimated at 3.4% until 2020.

CHINA	Vitamin D deficiency is a particular concern in China. Currently the majority of vitamin D sales are in supplements, with a small to negligible market for vitamin D fortified foods. There is a consumer preference for products in beverage format.
HONG KONG	Market conditions are very similar to the Chinese market.
INDIA	Up to 80% of India's population suffers a vitamin D deficiency which has caused considerable bone health concerns across the country and led to vitamin D being India's most popular supplement product. This has driven an increased interest in vitamin D fortified products, particularly beverages for women and children.
INDONESIA	Indonesians are becoming increasingly aware of the role of calcium in maintaining and improving health, which is driving demand for vitamin-D fortified products and supplements for bone health. Marketing and advertising for calcium-fortified foods has become increasingly common in Indonesia. The lactose-intolerant Indonesian population tends to prefer vitamin D in fruit juices however in the short term, fortified dairy products will continue to be the primary mode of vitamin D delivery.
JAPAN	Vitamin D is a particular concern in Japan, given its role in bone health maintenance. The Japanese incidence of osteoporosis and bone disease amongst its elderly population is one of the highest in the world. It is important to note that Japanese consumers tend to prefer vitamin supplements over fortified foods. The market for children's vitamins is also expected to grow, particularly in fortified beverages that are easy for infants and toddlers to consume. The use of vitamins in the cosmetics sector will drive interest in fortified products.
MALAYSIA	As demand for bone health ingredients continues to grow in South East Asian markets, Malaysia and Singapore will witness a growing focus on vitamin D and calcium. The increasing rate of urbanisation and long work hours reduces the amount of time that residents spend outdoors during the day. Vitamin D deficiency is therefore prevalent, driving interest in natural products such as fatty fish, egg yolks and mushrooms. There is also uptake of products and supplements enriched with vitamin D, including soy milk and margarine.
SINGAPORE	The Singaporean market conditions are very similar to the Malaysian market for vitamin D.
SOUTH KOREA	Vitamin D deficiency in South Korea is more prevalent amongst the younger generation, due to longer work hours resulting in less exposure to sunlight. Vitamin D fortification is a niche market at this stage, with most demand coming from vitamin water and multivitamin products. Several South Korean dairy products and soy milks also mention the added vitamin D potential.

OPPORTUNITIES FOR SOUTH AUSTRALIA

Vitamin D deficiency is an increasing health concern across Asian markets with strong links to bone health and calcium deficiency. Traditionally addressed through supplements there is a growing interest in fortified products in Asian markets, with beverages being the more popular form for consumption.

- Fortification is being encouraged by the Indonesian government as a way to address nutrition deficiencies in its largely lower middle income rural population. This may present an opportunity for South Australia to look at commodity level fortification and market penetration.
- Across the Asian markets, there is a strong link between vitamin D fortification and a drive for increased calcium uptake. With lactose malabsorption being prevalent in Asian populations, there is an opportunity to deliver diversified lactose-free products that provide vitamin D and calcium fortification.
- With no domestic suppliers of functional fortified vitamin D foods currently operating in China, an opportunity presents for South Australian producers and exporters.

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