

Report Information

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Microcrystalline Cellulose Market Research Report - Forecast till 2030

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Description:

Global Microcrystalline Cellulose Market Overview

The microcrystalline cellulose market size was valued at USD 1.1 billion in 2021. The microcrystalline cellulose industry is projected to grow from USD 1.2 Billion in 2022 to USD 1.85 billion by 2030, exhibiting a compound annual growth rate (CAGR) of 6.78% during the forecast period (2022 - 2030). Increasing application of microcrystalline cellulose in various industries and growing awareness about health are the key market drivers enhancing the market growth.

Microcrystalline Cellulose Market Overview

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Microcrystalline Cellulose Market Trends

• Growing Pharmaceutical industry to boost the market growth

Microcrystalline cellulose is used in the pharmaceutical industry as a stabilizer, binder, film-forming agent, suspension agent, and disintegrate in tablet formulations, ointments, and other topical therapeutic bases. MCC is one of the most important and widely used excipients in the pharmaceutical industry. It is a key diluent and is used as a binding agent in pharmaceutical formulations. It is extensively used in drug preparations such as tablets, capsules, sachets, and so on. The growing production of pharmaceutical products is further driving the market. Emerging countries such as China, Brazil, and India are the rapidly-growing the demand for microcrystalline cellulose market revenue.

Further, growth in consumption of processed foods across the globe majorly drives the market. Increase in consumption of processed food has augmented the use of MCC as an additive, which in turn boosts the market growth. Moreover, consumption of pharmaceutical products, such as tablets and capsules, is expected to fuel the demand for MCC. However, volatile prices and availability of substitute products have restricted the market growth. Conversely, rise in disposable income of population in developing economies in Asia-Pacific is anticipated to provide new opportunities for the key players.

Additionally, increasing application of microcrystalline cellulose in various industries is a major factor propelling growth of the microcrystalline cellulose market. For instance, microcrystalline cellulose is used as stabilizer, gelling agent, suspending agent, and anti-caking agent in beverages. It is also used as a cold and hot stabilizer, in frozen food, ice cream, and canned meat, in order to improve the shelf life of these products.

However, microcrystalline cellulose is widely used in pharmaceuticals, owing to its tastelessness, odorlessness, and chemical inertness properties. According to the International Trade Administration, in 2021, the market for pharmaceuticals is projected to grow from around US\$ 1.22 trillion in 2021 to US\$ 1.42 trillion by 2021. Steadily growing pharmaceutical industry is expected to support market growth of microcrystalline cellulose over the forecast period. Therefore, growing demand for pharmaceutical industry has enhanced the microcrystalline cellulose market CAGR across the globe in the recent years.

Microcrystalline Cellulose Market Segment Insights

Microcrystalline Cellulose Source Insights

The microcrystalline cellulose market segmentation, based on source, includes wood based, and non-wood based. The wood based segment held the majority share in 2021 to the microcrystalline cellulose market revenue. Growing applications in the pharmaceutical sector are expected to continue pushing sales in this segment over the forecast period. Pharma-grade microcrystalline cellulose is derived from wood pulp, where cellulose chains are arranged in layers held by lignin and strong hydrogen bonds. Derived from cellulose hydrolysis, microcrystalline cellulose is then used as a diluent, offering superior binding properties and plasticity. However, non-wood based segment is the fastest-growing category over the forecast period. Growing awareness regarding carbon emission and rapid deforestation is underpinning the need for environment-friendly production processes and materials. This has led to the development of non-wood-based fibers and raw materials for microcrystalline cellulose production.

Microcrystalline Cellulose End-Use Industry Insights

The microcrystalline cellulose market data has been bifurcated by end-use industry into pharmaceuticals, food & beverages, and cosmetic & personal care. The pharmaceuticals segment dominated the market in 2021 and is projected to be the faster-growing segment during the forecast period, 2022-2030. This is attributed owing to high use of microcrystalline cellulose in pharmaceutical. This is due to its chemical inertness and dry binding properties. However, food & beverages is the fastest-growing category over the forecast period due to wide application of microcrystalline cellulose in various food and beverages including desserts, frozen food, dairy products, and baked goods. Hence, it is also used as a fat replacer and helps maintain food consistency positively impacts the market growth.

Figure 2: Microcrystalline Cellulose Market, by End-User Industry, 2021 & 2030 (USD Million)
Microcrystalline Cellulose Market, by End-User Industry, 2021 & 2030

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Microcrystalline Cellulose Regional Insights

By Region, the study provides the market insights into North America, Europe, Asia-Pacific and Rest of the World. Asia-Pacific microcrystalline cellulose market accounted for USD 0.47 billion in 2021 and is expected to exhibit a significant CAGR growth during the study period. This is attributed to steadily growing food and pharmaceutical industries as microcrystalline cellulose has high demand in pharmaceuticals and is extensively used as functional ingredient in food and beverages across the region. Moreover, China microcrystalline cellulose market held the largest market share, and the India microcrystalline cellulose market was the fastest growing market in the Asia-Pacific region.

Further, the major countries studied in the market report are: The U.S, Canada, Germany, France, UK, Italy, Spain, China, Japan, India, Australia, South Korea, and Brazil.

Figure 3: MICROCRYSTALLINE CELLULOSE MARKET SHARE BY REGION 2021 (%)
MICROCRYSTALLINE CELLULOSE MARKET SHARE BY REGION 2021

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Europe microcrystalline cellulose market accounts for the second-largest market share due to the increasing government-backed investments in drug development and improvements in the quality of pharmaceutical products are anticipated to bode well for the market in this region. Further, the Germany microcrystalline cellulose market held the largest market share, and the UK microcrystalline cellulose market was the fastest growing market in the European region.

The Asia-Pacific microcrystalline cellulose Market is expected to grow at the fastest CAGR from 2022 to 2030. This is due to the economic recovery and the increase in employment rate are the growth factors in the region, which, in turn, supports the growth of the market. Moreover, China microcrystalline cellulose market held the largest market share, and the India microcrystalline cellulose market was the fastest growing market in the Asia-Pacific region.

Microcrystalline Cellulose Key Market Players & Competitive Insights

Major market players are spending a lot of money on R&D to increase their product lines, which will help the microcrystalline cellulose market grow even more. Market participants are also taking a range of strategic initiatives to grow their worldwide footprint, with key market developments such as new product launches, contractual agreements, mergers and acquisitions, increased investments, and collaboration with other organizations. Competitors in the microcrystalline cellulose industry must offer cost-effective items to expand and survive in an increasingly competitive and rising market environment.

One of the primary business strategies adopted by manufacturers in the microcrystalline cellulose industry to benefit clients and expand the market sector is to manufacture locally to reduce operating costs. In recent years, microcrystalline cellulose industry has provided medicine with some of the most significant benefits. The microcrystalline cellulose market major player such as DuPont, Asahi Kasei Corporation, JRS Pharma, Roquette Frères, and others are working to expand the market demand by investing in research and development activities.

Asahi Kasei Medical Co., Ltd. manufactures and distributes medical devices. The Company produces dialyzers, therapeutic apheresis products, leukocyte reduction filters, virus removal filters, and other products. Asahi Kasei Medical markets its products throughout Japan. In June 2022,

Asahi Kasei Medical has completed its acquisition of Bionova Scientific, LLC, a provider of contract process development services and GMP-compliant contract manufacturing services to biopharmaceutical companies. Bionova Scientific will operate as a business unit within Asahi Kasei Medical's bioprocess division. Bionova Scientific will continue to expand its business by building on its strengths as a CDMO specialized in the process design and manufacture of various types of biologics such as microcrystalline cellulose, cytokines, vaccines, hormones etc.

Also, DFE Pharma is a leader in pharma- and nutraceutical excipient solutions. The company develop, produce and supply high-quality functional excipients for use in the pharmaceutical, biopharmaceutical, and nutraceutical industries for respiratory, oral solid dose (OSD), ophthalmic and parenteral formulations. In July 2021, DFE Pharma, a provider of pharmaceutical Excipient solutions, launched Pharmacel sMCC 90, a silicified variant of microcrystalline cellulose. The new product is developed as a synergistic solution for challenging oral solid dosage formulations. It offers increases surface area, enhanced powder flow, and superior tablatibility, thereby improving formulation robustness.

Key Companies in the Microcrystalline Cellulose market includes

- DuPont
- Asahi Kasei Corporation
- JRS Pharma
- Roquette Frères
- Mingtai Chemical Co., Ltd.
- Accent Microcell Pvt. Ltd.
- JRS Pharma
- Pharmatrans-Sanaq AG
- DFE Pharma
- Weiming Pharmaceutical MFG. Co., Ltd
- Sigachi Industries Pvt. Ltd., among others

Microcrystalline Cellulose Industry Developments

May 2022: Asahi Kasei had established a group-wide data management platform called “DEEP” (Data Exploration and Exchange Pipeline) to accelerate digital transformation (DX) throughout the Asahi Kasei Group, and started its operation in April 2022. DEEP has already been utilized in the analysis of several businesses, and is expected to make further contribution to the enhancement of management and businesses.

January 2021: Asahi Kasei's specialty solutions SBU had announced that they will build a second plant for microcrystalline cellulose at its Mizushima Works in Kurashiki, Okayama, Japan. The expansion is expected to be completed by 2023's spring season. Asahi Kasei currently manufactures Ceolus, a microcrystalline cellulose used primarily in pharmaceuticals as tablet binder, in Nobeoka, Miyazaki, Japan. Through this expansion Asahi Kasei will enhance its market presence in Japan and adjoining countries

Microcrystalline Cellulose Market Segmentation

Microcrystalline Cellulose Source Outlook

- Wood Based
- Non-wood Based

Microcrystalline Cellulose End-Use Industry Outlook

- Pharmaceuticals
- Food & Beverages
- Cosmetic & Personal Care

Microcrystalline Cellulose Regional Outlook

- North America
 - US
 - Canada
- Europe
 - Germany
 - France
 - UK
 - Italy
 - Russia
 - Spain
 - Rest of Europe
- Asia-Pacific
 - China
 - Japan

- - India
- - South Korea
- - Australia & New Zealand
- - Rest of Asia-Pacific
- - Latin America
 - Mexico
 - Brazil
 - Argentina
 - Rest of Latin America
- - Middle East & Africa
 - Turkey
 - GCC Countries
 - South Africa
 - Rest of the Middle East & Africa

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