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## THE WORLD LACTOFERRIN AND LACTOPEROXIDASE MARKET

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Science Market Regulation

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## Technical & Competitive Scanning - Regulations - Manufacturers

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This comprehensive report is based on in-depth interviews with food companies completed by a desk review. It provides for DECISION MAKERS a global understanding of the sector as well as an outlook on its future.

### MARKET ANALYSIS

- Trends and outlook
- Process
- Use of ingredients: volume-value
- Manufacturers profiles
- Users opinions
- Regulation

### MARKET SEGMENTS

- Food industry
- Cosmetics
- Pharmacy
- Food supplements
- Nutraceuticals

### INGREDIENTS

- Lactoferrin
- Lactoperoxidase

### COUNTRIES COVERED

- North America
- Western & Eastern Europe
- Asia
- Australia – New Zealand

# THE WORLD LACTOFERRIN AND LACTOPEROXIDASE MARKET

## OBJECTIVES

### MARKET

Industrial users needs, expectations and volumes

Applications in segments and consumption trends

Consumer market trends by food segments

Prospective & forecast

### MANUFACTURERS

Processes & Capacities

Market share

Company description

### RESEARCH

New researches and Developments

New applications

## INTRODUCTION

It is now over 30 years since lactoferrin was first isolated. Lactoferrin is a 70-80 kDa single subunit glycoprotein and consist of two domains, each with one iron-binding site that requires synergistic binding of a bicarbonate anion (Anderson et al., 1989). A conformational change in the binding site, between open or closed forms, accompanies iron binding and release. The affinity of lactoferrin for iron is much greater than of transferrin which functions as an iron carrier in serum.

Lactoferrin is present in human milk, and many exocrine fluids (saliva, mucous secretion) as well as mammalian.

| Lactoferrin concentration |         |
|---------------------------|---------|
| Bovine milk               | 200mg/l |
| Bovine colostrum          | 1g/l    |
| Human milk                | 2-4 g/l |
| Human colostrum           | 6-8 g/l |

Promising messages are linked to lactoferrin: Iron transport – Stimulation of immune system - Health of intestinal mucosa

Recent findings in mice suggested that bovine lactoferrin could act as an immunostimulating factor on the mucosal immune system and that this activation of the mucosal immune system is dependent on the ability of lactoferrin to bind to intestinal mucosa.

## FUNCTIONALITIES

There are many effects of lactoferrin on a variety of biological systems but the main results pertain to the knowledge of the lactoferrin structure.

•**Heat stability:** At low ionic strength and/or low pH, the resistance of lactoferrin to heat denaturation is good and methods for heats treatment and pasteurization have been published.

•**Iron bioavailability:** Two features of the functional properties of lactoferrin are its ability to bind iron exceptionally tightly and the coupling of rigid-body domain movements to iron bindings and release.

•**Cell proliferation:** Lactoferrin has been reported to enhance proliferation of various cells, including enterocytes, adenocarcinoma cells, myoblasts, a macrophage cell line, fibroblasts and neonatal hepatocytes.

•**Antimicrobial agent:** Its capacity to bind iron and to stay bound with iron until pH 3 interfer in the proliferation of pathogen bacteria.

•**Antiviral agent:** Recently, Antiviral activity has been described as well for herpes, cytomegalo and influenzes virus.

•**Inflammatory and Immune response:** Lactoferrin has various effects on the immune system, such as regulation of antibody production, complement activation, and natural killer cell function.

•**Anti-oxidant effect:** Lactoferrin scavenges excess iron thereby protects the host to peroxidation reactions.

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## OUTLOOK OF THE MARKET

Lactoferrin is a complex molecule with a number of interesting functional properties. Based upon these, lactoferrin may enter the composition of in a wide range of products. Looking at the recent interest from the scientific world, many new applications for lactoferrin will be added to the list in the future. Thus, nowadays, the market of lactoferrin and lactoperoxidase is still limited to a few countries like Japan and some Asian countries.

Since 2000, the market has increased nearly by 60%. There is a high level of competition with certain large companies that have worked on lactoferrin and lactoperoxidase for more than 20 years. The major players on this market are Morinaga, Campina Friesland, Murray Goulburn and Westland.

A number of companies who have worked on commercial production of lactoferrin few years ago and have patents have stopped their projects. There are a few new companies who recently entered the market of bovine lactoferrin on an industrial scale (e.g. Davisco, Glanbia). A growing share of the market also being taken today by companies that choose to produce human lactoferrin such as Pharming, Agennix, Ventria.

When debating whether lactoferrin should be added to foods for health claims, two concerns immediately arise. The first relates to whether the form of lactoferrin added will have the intended biological activities. The second relates to the long terms and side effect of ingesting lactoferrin

| Segment                      | 1997 | 2005 | 2007 | 2008 | 2010 |
|------------------------------|------|------|------|------|------|
| <b>FOOD &amp; NUTRITION</b>  |      |      |      |      |      |
| • Infant formula             |      |      |      |      |      |
| • Food supplements           |      |      |      |      |      |
| • Dairy products             |      |      |      |      |      |
| <b>PHARMACEUTICALS</b>       |      |      |      |      |      |
| • Iron tablets               |      |      |      |      |      |
| • Immune system stimulation  |      |      |      |      |      |
| • Health of intestinal flora |      |      |      |      |      |
| <b>COSMETICS and HYGIENE</b> |      |      |      |      |      |
| • Skin care                  |      |      |      |      |      |
| • Body care                  |      |      |      |      |      |
| • Oral hygiene               |      |      |      |      |      |
| <b>OTHERS</b>                |      |      |      |      |      |
| <b>TOTAL</b>                 |      |      |      |      |      |

SAMPLE

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## POTENTIAL APPLICATIONS OF LACTOFERRIN AND LACTOPEROXIDASE

### Potential Market

Some of the applications are related to the natural presence of lactoferrin and lactoperoxidase in the human secretions: milk, saliva, tears.

New field of application are under development such as use for treatment of intestinal ulcers and other gastric disorders, hepatitis C treatment, ...

The following table describes the most current applications of lactoferrin and lactoperoxidase.

Lactoferrin has present applications in the dietetic field (food or OTC drug) and more anecdotally oral hygiene and in animal care nutrition.

Although enormous advance have been made in the knowledge of lactoferrin structure, its biological functions in vivo still need to be improved and especially inside the human body. This is what currently limit some authorizations of use. Lactoferrin is presently a candidate to be promoted as a "wonder protein", but the situation is complicated because it is a well-known natural substance that cannot be patented.

|                                    | Application field                       | Main products  |
|------------------------------------|---|--|
| Food applications                  | <b>Infant formulas</b>                  | First age formula<br>Weaning food  |
|                                    | <b>Health foods</b>                     | Nutritional drink<br>Mineral fortified food<br>Sport nutrition                         |
|                                    | <b>Preservatives</b>                    | Biopreservatives   |
|                                    | <b>Dairy products</b>                   | yoghurts   |
| Pharmaceuticals applications       | <b>Prescription Drug</b><br><b>OTC</b>  | Enteral food<br>Medicine<br>Eye care products  |
| Cosmetics and hygiene applications | <b>Cosmetics</b><br><b>Oral hygiene</b> | Facial skin care<br>Body care<br>Hair care<br>Tooth paste<br>Mouth wash<br>Chewing gum |
| Veterinary products                | <b>Preservative</b>                     |  |

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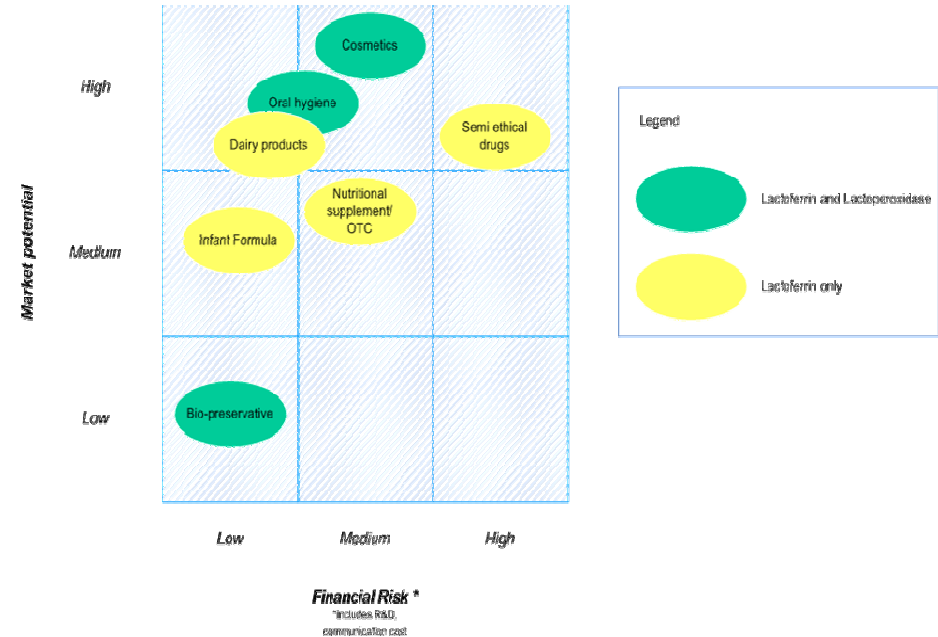
New researches and Developments

New applications

## STRATEGIC ISSUES FOR LACTOFERRIN AND LACTOPEROXIDASE

Lactoferrin and lactoperoxidase belong to the range of bioactive milk proteins and are added as ingredient to foodstuffs in order to achieve functional and nutritional goals. However, there have been difficulties understanding specific structure/function relationships, particularly as it functions in vivo, making some developments more risky.

It is also important not to underestimate new developments in human lactoferrin which will threat bovin lactoferrin probably in a next decade.

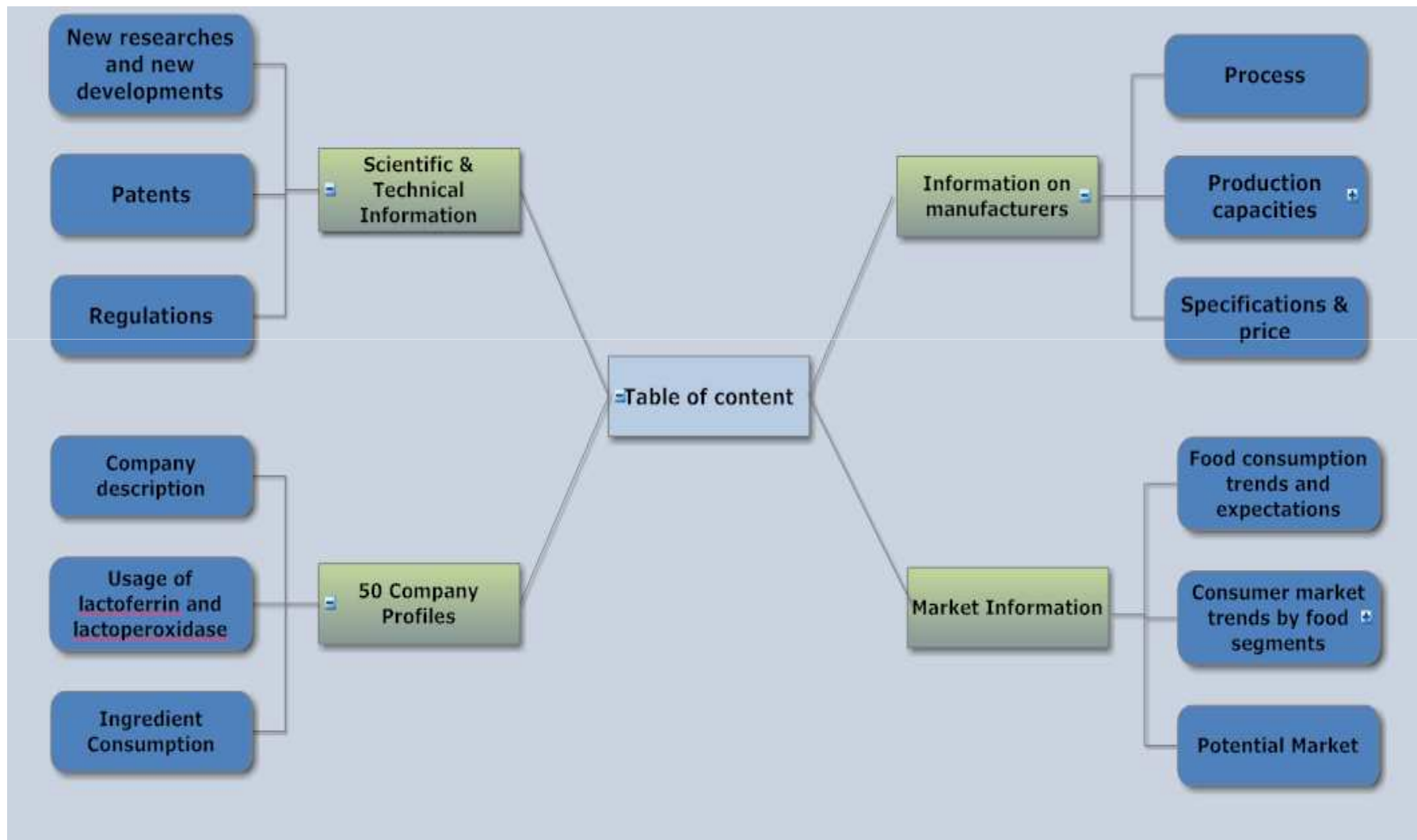


| Application                               | Potential market | Targeted functionalities   | Adaptation of Lf | Priority | Strategy to follow and comments   |
|---|------------------|--|------------------|----------|---|
| Dentifrice :<br>>Toothpaste<br>>Mouthwash | +++              | > Anti-bacterial<br>> Anti-inflammatory                          | +++              |          | > Demonstrate advantage/ other product (plants)<br>> Study stability of lactoferrin during toothpaste process   |
| Acne treatment                            | +++              | > Anti-bacterial<br>> Anti-inflammatory                          | ++               |          | > Market = dermatological products<br>> Demonstrate the non allergenicity of Lf<br>> Highlight the natural state of Lf  |
| Facial skin care product                  | +++              | > Cell growth promotion<br>> Anti-oxidant<br>> Anti-inflammatory | ++               |          | > Market = moisturizer and anti-age products<br>> Good image of milk product in the cosmetic industry (Estée Lauder has launched in new product including milk bio-protein)<br>> Demonstrate the non allergenicity of Lf<br>> Highlight the natural state of Lf |

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## THE WORLD LACTOFERRIN AND LACTOPEROXIDASE MARKET

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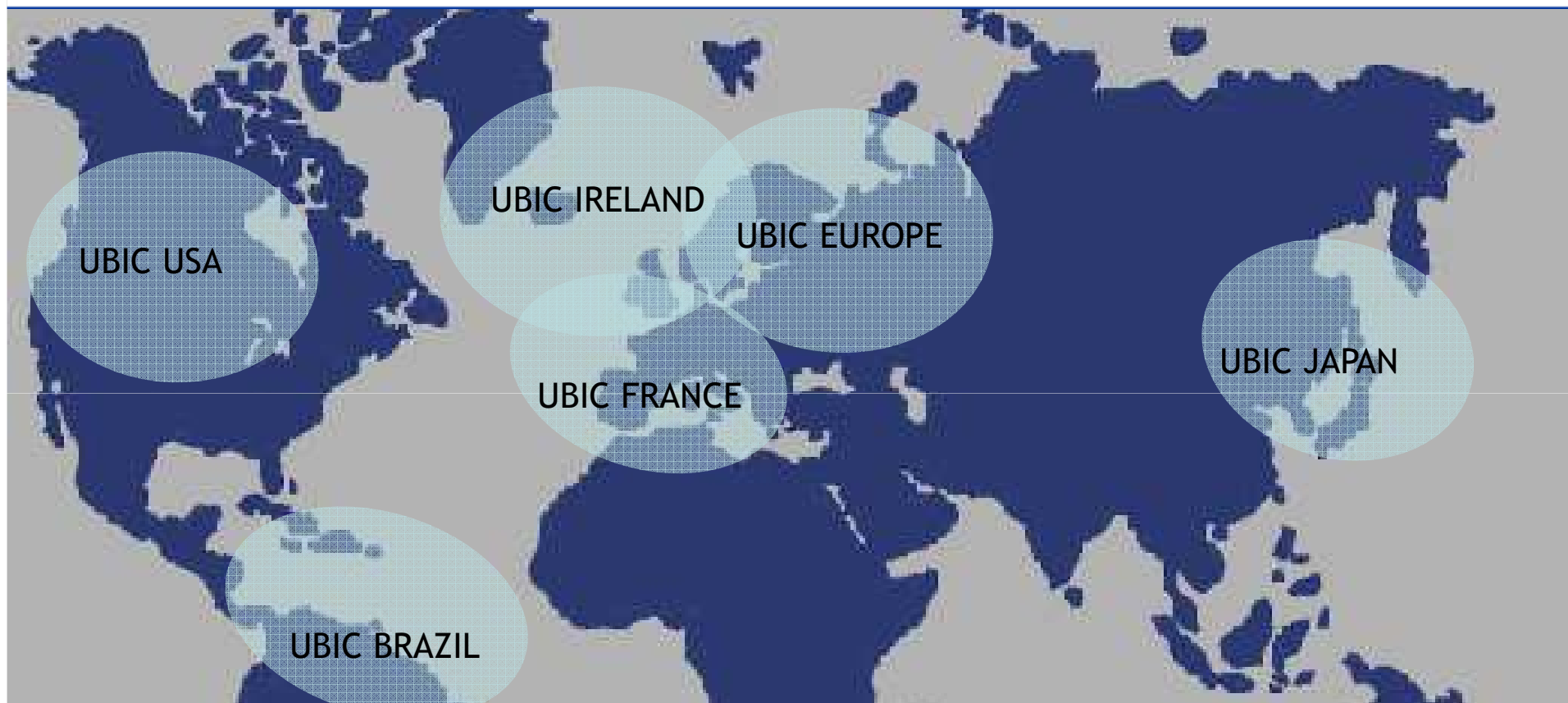
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