

Business Review

Established and Next-generation Emulsifiers

SUPPLY/DEMAND/FORECASTS/TRENDS

2024 - 2029

INTRODUCTION

Emulsifiers have long been a mainstay of the food and beverage industry, providing stable emulsions across a wide range of end-product categories. For example, Giract's proprietary database of food and beverage product labels lists over 300 products containing lecithin for each product containing ammonium phosphatide. Rising consumer demand for clean-label ingredients, which are typically perceived by consumers as traditional and healthy, has driven development of clean-label emulsification solutions. Recent advances include the development of functional proteins, insoluble fibres (citrus fibre in particular), enzyme blends, and broth ingredients, such as chickpea broth, amongst many others. However, the rise of this new generation of clean-label emulsifiers has coincided with the Covid-19 pandemic, Russia's invasion of Ukraine, escalating conflict in the Middle East, and logistics disruption in the Suez and Panama canals. Consequently, price pressures, imposed on consumers by such on-going instability, appear to conflict with the health and wellness trends, which align more closely with the prevailing clean-label drivers. Furthermore, consumer stockpiling, normalised by the pandemic and food/energy security concerns, has illustrated the requirement for product stability and shelf-life extension, increasing demand for emulsifiers in many applications.

There is significant development of clean-label emulsifiers, both established ingredients, such as functional proteins, fibres, enzyme blends, and broths repurposed for emulsification applications, as well as emulsifiers yet to gain market presence. This study explores the opportunities for this next generation of emulsifiers. From patent analysis through to interviews with start-ups, and academic/industrial laboratories, these ingredients are identified and profiled, and their functionality, advantages, and potential pitfalls explored. The study aims to indicate the winners and losers amongst this next-generation of clean-label emulsifiers, and provide projected market penetrations for each.

OBJECTIVES

The main objective is to provide an in-depth understanding of the established and next-generation emulsifiers. This will comprise the following sub-objectives:

- Identify and profile next-generation emulsifiers (patent analysis, start-up companies, academic/industrial research, etc.)
- Explore potential applications, advantages, and pitfalls of these emulsifiers
- Provide current (2024) supply and demand market sizes for emulsifiers
- Present food/non-food demand market splits for these ingredients
- Derive potential market penetration (2029) for next-generation emulsifiers
- Identify likely winners and losers (2029) within the next-generation emulsifiers

PRODUCTS

NEXT-GENERATION EMULSIFIERS: Nascent and currently under-development ingredients, including proteins (pea, soy, fava, others), fibres (citrus, apple, others), enzyme blends, ingredient blends, others (to be identified)

ESTABLISHED EMULSIFIERS: Lecithins (soy, sunflower, others), Ammonium phosphatides, MDG and DMG, DMG esters, Polyglycerol/Propylene glycol esters, Stearoyl lactylates (CSL/SSL), Sorbitan esters/polysorbates, Sucrose esters and sucroglycerides

SECTORS: Bakery & Cereals; Confectionery; Dairy; Beverages; Ready Meals; Processed Meat and Fish; Meatless Foods; Soups; Seasonings; Dressings & Sauces; Snacks; Syrups & Spreads; Margarine; Infant Nutrition; Sports and Performance Nutrition, Cosmetics

MARKETS: N. America (USA+Canada+Mexico); Brazil; Europe (EU27+UK+Norway+Switzerland); China; India; Saudi Arabia; United Arab Emirates; Selected ASEAN (Indonesia, Malaysia, Philippines, Singapore, Thailand); RoW (including Russia, Ukraine, Australia, South Korea, Vietnam, South Africa, Japan, Other LATAM)

TIMESCALE

Current supply and demand: 2024; Forecast demand: 2029

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SUBSCRIPTION

Please contact us for subscription details

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