Insoluble Fibre Ingredients

Global Supply/Demand Patterns

2019 – 2024

INTRODUCTION

Dietary guidelines have been published to help consumers retain overall wellness and help remedy individual health problems. One of these concerns fibre intake: an increase in fibre in the recommended daily adult diet has been increased to 28-36 g/day, 70-80% of which must be insoluble fibre. Many consumers are still below the minimum threshold and there is room for innovation in the insoluble fibre space. A significant benefit of insoluble fibre ingredients is their ability to be incorporated into formed and re-formed food components that are part of ready meals, whether vegetarian or meat based. In these products, insoluble fibre plays a dual bulking role, to increase volume and texture of the food and as a bulking agent in the digestive tract. New sources of insoluble fibre are also being explored, such as that from okara, where enzymatic modification can also lead to the enrichment of soluble fibre. A mix of soluble and insoluble fibres, making for a techno-functional ingredient, and derived from natural sources with minimal processing, such as those from okara and citrus peel are also an interesting innovation. Keen competition in the market for insoluble fibre ingredients also comes from whole flours or specialty flours which have high intrinsic fibre content, whilst being a 'clean' product. Currently, these products are far too expensive for widespread use by the food industry and enjoy the patronage of consumers directly. With scaling up of processes leading to increased volumes and more advantageous pricing, along with the overwhelming pressure on food companies to create healthy foods, these whole flours present an interesting competitive scenario for the future. Another interesting source of insoluble fibre leveraging this trend is seaweed, again driven by consumer trends.

Giract, the foremost transnational consultancy in food ingredient strategy, market and business development, has a background of nearly 50 years research and forecasting. Giract has been tacking the global markets for soluble and insoluble fibres for the last two decades with its studies published in 2004, 2009, 2013, 2015 and 2018. Giract has also undertaken several confidential projects in this sector. As a key player or a company wishing to learn more about these important ingredients, this study serves a dual purpose for you – to help explore and exploit these high-profile markets and to make full use of an in-depth understanding of the market forces to develop your overall business in this sector.

OBJECTIVES

- To quantify the current market demand (2019) and to forecast volumes and trends to 2024 for insoluble fibre ingredients
- To understand the choice – the "why" and "why not" – for the use of a fibre, and to identify potential novel fibre ingredient alternatives based on in-depth user interviews
- To clearly describe the functionalities, properties and benefits of all the different fibres
- To identify the ingredient producers and to assess their strategies
- To establish the supply scenario of the selected 'ingredients'

PRODUCTS

Insoluble fibres from wheat, soy, oat, pea, beet, cellulose, bamboo, cottonseed, flax, potato, bagasse and other novel sources (e.g.: citrus peel, okara)

SECTORS

Dairy, drinks, bakery/cereals/bars, confectionery (chocolate and others), fruit preps, fat fillings, baby/infant formula, processed meat, meat analogs, other food, and non-food (pet food and animal feed, performance nutrition/supplements)

GEOGRAPHICAL

USA/Canada; EU28/Norway/Switzerland

TIMESCALE

2019 – 2024

PROGRAMME

The dominant element of the study is interviews with key players – producers, blenders and end-users – from which a real understanding of the market has been derived

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