

Business Review

Antimicrobial/Antifungal Preservatives

2024 - 2029

Production, Supply, Demand, Forecasts, Current Challenges and Opportunities

INTRODUCTION

The prevailing trends driving the use of antimicrobial/antifungal ingredients/additives in the food industry is constantly changing. Chemical preservatives, such as sorbates, benzoates, and hydroxybenzoic acid derivatives, etc., have been perceived negatively for many years; however, their use is entrenched in many applications in Europe and North America, and they have significant potential in developing countries. The growing consumer focus on 'natural' labelling and health and wellness trends spurred demand for clean-label preservatives, such as fermentates, polylysine, and lysozyme, although these have often failed to live-up to their initial promise in many sectors. For example, Giract's proprietary database of food and beverage product labels lists 25 products containing benzoates for each product containing lysozyme.

Since the last edition of Giract's comprehensive study (2018) the preservatives market has been affected by a series of impactors: 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 preservatives in many applications.

This brand new edition of this comprehensive analysis of the antimicrobial/antifungal markets will assess the current market for these ingredients, and explore the opportunities and challenges ahead for the established and clean-label preservatives.

OBJECTIVES

The main objective is to provide an in-depth understanding of the markets for antimicrobial and antifungal preservatives. This comprehensive study will provide:

- Current (2024) production volume estimates (ton/kt) by region, manufacturer, and preservative
- Assessment of legislation governing the use of preservatives by region
- Indicative prices by preservative
- Current (2024) demand volumes (ton/kt) by region, preservative, and application
- Insights on next-generation preservatives (patent analysis, start-up companies, academic/industrial research, etc.)
- Forecast (2029) demand volumes (ton/kt) by region, preservative, and application
- Analysis of the why/why not for preservatives and their clean-label alternatives

PRODUCTS

Benzoates, Sorbates, Acetates, Lactates, Lactic acid, Propionates, Nitrates, Sulphites, Nisin, Natamycin, Fermentates, Lactoferrin, Lysozyme, Others

Other commercially significant products identified during the research will be included

MARKETS

North America (USA+Canada), Europe (EU27+UK+CH+NO), China, India, Brazil, ASEAN, Middle East (UAE+KSA), RoW

SECTORS

Processed meat and fish, bakery and cereals, spreads, dairy, ready meals, sauces, dressings & dips, beverages, and other food applications

TIMESCALE

Current supply and demand: 2024

Forecast demand: 2029

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SUBSCRIPTION

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