MULTICLIENT STUDY

Business Review
Process Flavors for Savory Sectors
Supply, Demand and Forecasts

Global with Focus on Europe and selected Asian countries

2016-2021

April 2017

Sectors

soups, bouillon/stock cubes, sauces, noodles, ready meals, savory snack foods, processed meat and pet food

Markets

Europe (EU28+NO+CH)
China
India
Indonesia
Thailand
Vietnam
Philippines

GIRACT
Geneva, Switzerland

Transnational Business Research & Consultancy

Introduction

Giract has been researching the global savory ingredients and value added intermediates markets since 1990 and has produced many ground-breaking studies in Europe, North and South America and Asia. It is now proposing a review of the process flavors markets in Europe and selected Asian countries with a global overview.

Questions addressed include:

- Who are the manufacturers of process flavors in each selected region?
- What is the estimated production of these products by the key producers?
- How are the key end-users reacting to the use/non-use issues of these products?
- What are the opportunities and risks for these ingredients?

Demand estimates and forecasts by type of flavor (pork, beef, chicken, other), by selected country/region and by end-use sectors are derived.

For more information, contact

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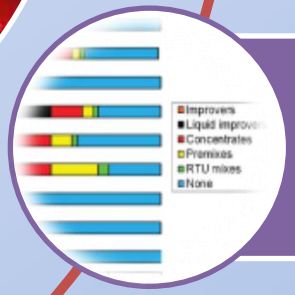
Objectives of this study

Process Flavors for Savory Sectors – Supply, Demand and Forecasts

To identify supply, demand and trends for the process flavor building blocks

To examine the factors for and against change which influence food formulators who are using or could be using process flavors



To define the industrial market for process flavor building blocks in 2016 and forecast market sizes through 2021

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Subscription

This unique study examines supply/demand and forecasts of Process Flavors for Savory Sectors across on Europe and Asian countries.

SCOPE

Products

- Process flavor key (building blocks). An estimate of finished processed flavoring containing process flavor keys are provided.
- End-product sectors include soups, bouillon/stock cubes, sauces, noodles, ready meals, savory snack foods, processed meat and petfood

Markets

- Europe (EU28+NO+CH)
- China
- India
- Indonesia
- Thailand
- Vietnam
- Philippines

STUDY HIGHLIGHT

Programme

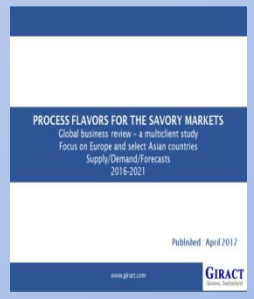
Following an initial review of Giract's in-house data, interviews with key players (producers, blenders and users) are the dominant element of the study in order to derive a real understanding of the market

Current: 2016
Forecast: 2021

Timescale

WHAT DO YOU GET?

1. **Electronic Copy** of report in PowerPoint presentation format
2. **One Printed Copy**



3. Report published in **April 2017**

Giract Competence

Most recent and on-going relevant work in the multiclient field includes:

- Global Business Review of Savory Ingredients, 2017-2022
- Added-value Savory Intermediates, Global review, 2013-2017
- Savory Ingredients Markets, Middle East & Africa, 2016-2021
- Global Business Reviews on HVP, Yeast Extracts, MSG, Nucleotides and Process Flavors
- Annual Savory Flavor & Food Industry Conference
- Flavor Research Programme to promote flavor research amongst PhD students in Europe (www.giract.com/flavor-research-programme.php)

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- 3 BEIJING Z & B (ZHONGRONG BAIMING) TECHNOLOGY CO., LTD.
- 4 DSM China
- 5 GIVUADAN China
- 6 GUANGDONG ADD FLAVOR & FRAGRANCE CO., LTD.

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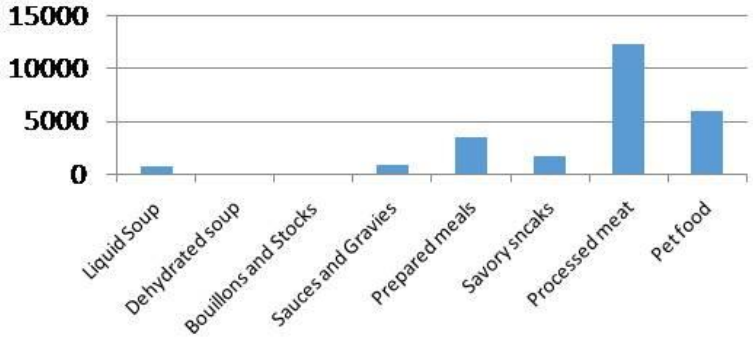
Background

	2015 (mio)	2020 (mio)	CAGR (%)
Population	Data Edited		

- The food industry is fragmented, with around ##companies – about ##% are SMEs
- #, #, #, Italy and Spain are the largest food manufacturing countries – 65% of total European food production

Volume of demand sectors, 2016, Europe kt



- The European food and drink industry is a mature, stable and gradually growing industry

Source: Giract based on Canadean, Euromonitor and database analysis

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Production – Europe (1)

Production of Process Flavor Keys by Type, Europe, 2016

Company	Location	HVP	Non-HVP	Total
Givaudan	Kemptthal, CH			
IFF	Tilberg, NL			
Unilever	Heilbronn, DE			
Gallina Blanca Star	Barcelona, ES			
	Holzminden, DE			
	Zaandam, NL			
	Dresden, DE			
	Bergen, NO			
	Lampeter, UK			
Robertet/Nactis	Schoten, BE			
Haco	Guemlingen, CH			

Data Edited

tons 97% dsb
Source: Giract

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Availability – Europe

	Tons (97% dsb)
Production	
Import	
Export	
Availability	

Source: Giracf

- ##

Data Edited

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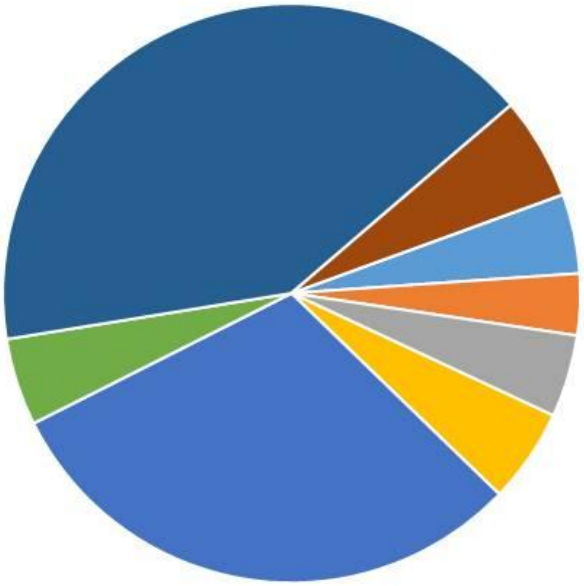
Demand - Europe

Demand by sector, Europe, 2016 **tons**



Source: Giract

Data Edited

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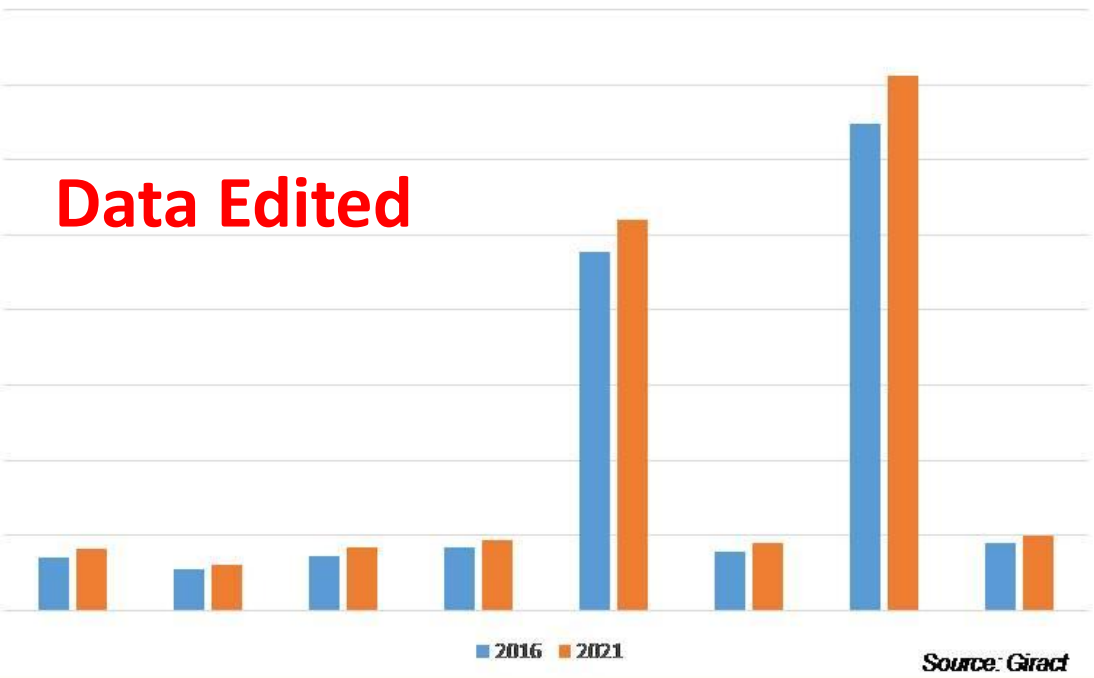
Demand forecast – Europe

Demand forecast by sector, Europe, 2016 tons **(97% dsb)**



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Demand forecast – Europe

Demand by forecast by sector, Europe, 2021

Sector	RFB	RFC	RFP	RFO	Total
Total demand					
Industrial food demand					
Liquid soups					
Dehydrated soups					
Bouillon & stock					
Sauces & Gravies					
Prepared Meals					
Savory Snacks					
Processed Meat					
Non-food demand					
Petfood					

Data Edited

Source: Giracf
tons (97% dsb)

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