

Business Review

Texturizing Solutions

CURRENT SOLUTIONS AND NEXT-GENERATION CLEAN-LABEL ALTERNATIVES

2024 - 2029

INTRODUCTION

Texturizers have long been a mainstay of the food and beverage industry. Historically, texturizers comprise starches, hydrocolloids, or emulsifiers.

Hydrocolloids provide well-characterised bulking, binding, rheological modulation, gelling, water retention, etc., although they are increasingly subject to clean-label pressures. Of which, starches provide cost-effective and well-characterised binding, bulking, as well as other functionalities such as rheological modulation, gelling, water retention, etc. Increasingly, consumers, and consumer product manufacturers, seek clean-label alternatives, giving rise to clean-label functional starches, typified by Ingredion's Novation range of starches.

Emulsifiers are essential in food and beverage matrices that require an emulsion, and stability retention. 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, such as citrus fibre, and enzyme blends or fermented ingredients. In a recent study, Giract estimated the global market for emulsifiers to be approximately 880kt, with approximately 3.5% of this volume already occupied by next-generation emulsification ingredients, although this share is anticipated to grow rapidly over the coming years.

Consumer product manufacturers are progressively moving away from single ingredient solutions, leveraging the combined functional properties of texturizing blend solutions tailored to specific applications. Equally, ingredient suppliers are expanding along the value-chain to offer keystone texturization solutions for end-users, and to capture greater value from ingredient supply, as China increasingly occupies the single ingredient supply base. Giract will assess all this and more in this brand new study on texturizing solutions, and the clean-label alternatives being developed to replace them.

OBJECTIVES

The main objective is to provide an in-depth understanding of the current market for texturizers and texturizing solutions, and the next-generation of clean-label alternatives.

This comprises provision of the following:

- Characterisation of production, trade, availability (kt) for hydrocolloids, emulsifiers, and texturizing solutions by country/region
- Legislation covering trade and application of hydrocolloids, emulsifiers, and texturizing solutions by country/region
- Indicative pricing of hydrocolloids, emulsifiers, and texturizing solutions by country/region
- Current (2024) and forecast (2029) demand (kt) for hydrocolloids, emulsifiers, and texturizing solutions by country/region and by application
- Explore current use, advantages, challenges, pitfalls, and anticipated use of these ingredients with end-users across regions
- Identify and profile next-generation alternatives for texturization (patent analysis, start-up companies, academic/industrial research, etc.)
- Explore potential applications, advantages, and pitfalls of these alternatives
- Derive potential market penetration (2029) for next-generation texturization alternatives
- Present the market opportunity outlook (2029; t/kt) for next-generation texturization alternatives

DEFINITIONS	The terms “solution” and “system” are considered to be synonymous. Both terms describe a single product comprising a combination of 2 or more ingredients that act synergistically to deliver texturisation functionality. This definition excludes blends that are supplied purely for cost-effectiveness or formulation convenience.
PRODUCTS	<i>ESTABLISHED HYDROCOLLOIDS</i> Agar, Alginates, Carrageenan, Cellulosics (CMC, MCC, MC/HPMC), Pectin, Gelatin, Gum Arabic/ Acacia, Guar Gum, Konjac Gum, Locust Bean Gum, Cassia Gum, Tara Gum, Native Starch, Modified Starch (physically-/chemically-modified), Xanthan, Gellan <i>ESTABLISHED EMULSIFIERS</i> Lecithins (soy, sunflower, others), Ammonium phosphatides, MDG and DMG, DMG esters (Datem, etc.), Polyglycerol/Propylene glycol esters, Stearoyl lactylates (CSL/SSL), Sorbitan esters/polysorbates, Sucrose esters and sucroglycerides <i>TEXTURIZATION SOLUTIONS AND NEXT-GENERATION ALTERNATIVES</i> Nascent and currently under-development ingredients and solutions, including, but not limited to, starches, proteins (pea, soy, fava, others), fibres (citrus, apple, others), gums, clean-label functional starches, enzyme blends, ingredient blends, others (to be identified)
SECTORS	Bakery & Cereals; Confectionery; Dairy; Dairy Alternatives; Beverages; Ready Meals; Processed Meat and Fish; Meatless Foods; Soups; Seasonings; Dressings & Sauces; Snacks; Syrups & Spreads; Infant Nutrition; Sports and Performance Nutrition
MARKETS	North America (USA, Canada); Mexico; Brazil; Europe (EU27, UK, Norway, Switzerland); China; Asia-Pacific (India, Indonesia, Malaysia, Philippines, Singapore, Thailand); Middle East (Saudi Arabia; United Arab Emirates), ROW overview
TIMESCALE	Current Supply and Demand: 2024 Forecast Demand: 2029
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