

Business Review

Clean-label Starches for the Food Industry

Analysis of Functional, Physically-modified, and Native Starches
2021 – 2026 – 2031

Europe and North America

INTRODUCTION

Rising consumer demand for clean-label ingredients, which are typically perceived by consumers in the West as traditional and healthy, has driven development of clean-label starches. Clean-label is a broad term, used principally in a B2B environment, to describe characteristics of ingredients, but with less precision than other terms such as “organic” or “non-GM”. Clean-label has a broad range of interpretations, including: short ingredients lists; no E numbers; ingredients that consumers recognize (kitchen ingredients in popular parlance); natural; not synthetic/artificial. Typically, these vary by ingredient, region, and product type, and there is no specific legislation covering their use.

The application of clean-label functional starches, an ingredient category pioneered by Ingredion with its Novation range of starches to replace chemically-modified starches in food and beverages, gained considerable traction in the years preceding the Covid-19 pandemic. Typically, these starches are used in higher-value applications where consumers seek clean-label claims. However, the pandemic is having contrary impacts on the clean-label functional starch trend. On one side, it provides a demand driver, where consumers associate clean-label status with health and holistic wellness. Conversely, the pandemic has increased price pressure on consumers, and this in turn, presents a challenge to clean-label functional starches, which typically carry price points above the chemically-modified varieties.

OBJECTIVES

The objective of this report is to provide a comprehensive understanding of the current market, and market opportunities, for clean-label starches. This can be broken down into the following sub-objectives for each region:

- Provide production, trade/availability volumes (kt) of clean-label starches
- Profile manufacturers for positioning of clean-label starches, types provided, technology, etc.
- Provide indicative prices and legislation in each region
- Demand market volumes (kt) by application for clean-label starches in each region, including product types and brand manufacturers
- Forecast market volumes (kt) by application for clean-label starches
- Analysis of the trends, market drivers, and challenges for clean-label starches
- Assess current use/non-use of clean-label starches by end-users, and analyse the switching points (price, functionality, technical support, etc.) for replacing chemically-modified starches with clean-label alternatives

PRODUCTS

Clean-label starches comprising physically modified starches, native starches, and other functional starches carrying a recognized clean-label claim (for example, non-GMO, natural) used specifically to replace chemically modified starches in end-use applications

Starches will be split by raw material source (supply and demand), and, where present, waxy and organic varieties will be distinguished from standard varieties (supply and demand)

Chemically-modified starches and ingredients with comparable functionality, such as selected texturisers, will be included as competitor ingredients.

MARKETS

Europe (EU27, UK, Switzerland, Norway) and N. America (USA, Canada)

SECTORS

Bakery, Dairy, Dairy Alternatives, Meat Analogs, Batters & Breading, Snacks, Soups, Fruit Preparations, Dressings & Sauces, Syrups & Spreads, Ready Meals, Other food

TIMESCALE

2021 – 2026, with outlook 2031 (methodology and assumptions to be presented)

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SUBSCRIPTION

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