

Business Review

Clean-label Starches, Supply & Demand Analysis

2021 – 2026 – 2030

Europe, North America, and Key Asian Countries

INTRODUCTION	<p>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.</p> <p>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.</p>
OBJECTIVES	<p>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:</p> <ul style="list-style-type: none"> • 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 application examples • 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	<p>Clean-label starches comprising physically-modified starches, native starches, and other functional starches carrying a recognised clean-label claim (for example, non-GMO, natural) used specifically to replace chemically-modified starches in end-use applications</p> <p>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)</p> <p><i>Chemically-modified starches and ingredients with comparable functionality, such as selected texturisers, will be included as competitor ingredients.</i></p>
MARKETS	Europe (EU27, UK, Switzerland, Norway), N. America (USA, Canada), Key Asian Countries (China, Australia/NZ, Thailand, Malaysia, Other ASEAN)
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 2030 (methodology and assumptions to be presented)
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