

Business Review

Established and Clean-label Preservatives

USA, EU28, CHINA, INDIA, BRAZIL, ASEAN, ME (SAUDI ARABIA, UAE), ROW
2022 – 2027

INTRODUCTION The range of antimicrobial and antifungal ingredients/additives in food is changing all the time. Both the North American and European markets are in need of “clean-labels”, whilst Legislative Authorities are seeking greater food safety and thus reducing use of some traditional products. Often hurdle technologies are being introduced to reconcile these demands. The preservative industry has been witnessing some turmoil as a reflection of consumers’ desire for ‘natural’ products. Thus, even within the acidulants category, food producers tend to opt for ‘natural’ products. On the other hand, the ‘ultra-natural’ ingredients such as rosemary and sage extracts have not lived up to their initial promise. A number of current chemical preservatives – sorbic, benzoic and hydroxybenzoic acid derivatives – are continuously under threat, but these have significant potential in the developing countries. Importantly, the consumer (encouraged by the major retailers) believes that ‘natural is good’ and ‘chemical is bad’. Thus, the search for ‘clean-labels’ dominates formulation in many higher added-value food categories in the developed countries.

The Covid-19 pandemic has provided a fillip to this trend, as consumers increasingly seek clean-label ingredients, and those with a health halo. Conversely, the pandemic has presented increasing price pressure on the consumer, and with the current climate of rising energy costs and inflationary pressures, consumers will increasingly feel the financial pinch. This may represent a key challenge to premium positioned preservatives with a higher price point.

- OBJECTIVES**
- To review current and potential products, their specifications, food applications, limitations, price implications in typical recipes
 - To understand the legislative situation in North America, Europe, APAC, Brazil, Middle-East (Saudi Arabia, UAE)
 - To analyse the producers, their strategy for developing these products, estimated production
 - To appreciate the “why” and “why not” concerning the use of various antimicrobials/antifungal based on in-depth interviews with end-users, covering the different aspects (functional, ‘natural’, labelling and health)
 - To identify 2022 food market size and forecast for 2027 in each region

INGREDIENTS Nisin, Natamycin, Lactoferrin, Lysozyme, others

GEOGRAPHY North America (USA+Canada), Europe (EU27+UK+NO+CH), Selected APAC (China, India, ASEAN), Brazil, Middle-East (Saudi Arabia, UAE), RoW

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

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