

Insoluble Fibre Ingredients

Supply/Demand/Forecasts

Europe, North America, and Selected Asia

2021 - 2026

INTRODUCTION	<p>"High-fibre" was the original, and is still the most widely-recognised, health-focused label claim in Europe and North America. During the last decade, soluble fibres received the most attention due to their multiple capabilities of fibre delivery, texture and bulking, and prebiotic attributes. However, persistent lack of clarity regarding prebiotic claims, particularly in Europe, has reduced the ground-swell for soluble fibres, and reilluminated insoluble fibres as a cost-effective source of dietary fibre, texture and bulking, as well as functional delivery, such as moisture retention and shelf-life extension.</p> <p>The Covid-19 pandemic has refocused interest in insoluble fibres as the food industry tries to establish the balance between increased demand for products that carry health-related label claims; and rising demand for cost-effective food products, as many consumers feel the effect of the pandemic lock-downs and furlough schemes. Insoluble fibres present a crucial tool for food product formulators in redressing this balance.</p> <p>Keen competition in the market for insoluble fibre ingredients also comes from whole flours or specialty flours which have high intrinsic fibre content, whilst being a 'clean-label' ingredient. Currently, these products are too expensive for widespread use by the food industry; however, with production scale-up and increased volumes leading to more advantageous pricing, along with the overwhelming pressure on food companies to create healthy and clean-label products, these whole flours present an interesting competitive scenario for the future.</p> <p>Giract, the foremost transnational consultancy in food ingredient strategy, market and business development, has a background of nearly 50 years research and forecasting. Giract has been tracking the global markets for soluble and insoluble fibres for the last two decades with its studies published in 2004, 2009, 2013, 2015, 2018, and 2020. Additionally, Giract regularly conducts customised research projects in this sector. As a company wishing to learn more about these important ingredients, this study serves a dual purpose for you - to help explore and exploit these changing markets, and to acquire an in-depth understanding of the market forces to develop your overall business in this sector.</p>
OBJECTIVES	<ul style="list-style-type: none"> ▪ To clearly describe the functionalities, properties, and benefits of the different fibres ▪ To identify and profile the insoluble fibre manufacturers and their production (kt) ▪ To establish import, export, and availability by region and insoluble fibre ▪ To quantify the current market demand (2021; kt) and forecast market (2026; kt) by insoluble fibre type and end-use application ▪ To understand the "why" and "why not" for the use of the different insoluble fibres, and to identify potential novel fibre ingredient alternatives based on in-depth user interviews
PRODUCTS	Insoluble fibres from wheat, soy, oat, pea, beet, cellulose, bamboo, cottonseed, flax, potato, bagasse, citrus/apple, and other novel sources where relevant
SECTORS	Dairy, drinks, bakery (inc. cereals & bars), confectionery (chocolate & others), fruit preparations, fat-based fillings, baby/infant formula, processed meat, meat analogs, performance nutrition/supplements, other food, and non-food (pet food and animal feed)
GEOGRAPHICAL	North America (USA/Canada), Europe (EU27+UK+Norway+Switzerland), Selected Asia (India, Thailand, Indonesia)
TIMESCALE	2021 - 2026
PROGRAMME	The dominant element of the study is interviews with key players - producers, blenders and end-users - from which a real understanding of the market will be derived
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