

## Business Review

**Inulin, FOS, and Soluble Corn Fibre Market Opportunities**

## SUPPLY, DEMAND, DEMAND FORECASTS

2022-2027

## Selected Regions

**INTRODUCTION**

Inulin, FOS, and soluble corn fibre together constitute about 40% by volume of the global soluble fibre ingredients market. Soluble fibres are a multi-billion dollar ingredient category with inulin, soluble corn fibre and GOS leading by value. Inulin, polydextrose, FOS and GOS stood as the top 4 fibres based on the volume used in the past. Europe, USA, China and Japan were the heavy consumers of fibres. ASEAN together seems to be an interesting region since it is growing faster, but from a smaller volume.

The Covid-19 pandemic has presented a vast array of opportunities for health and wellness ingredients such as fibres, which are often associated with positive gut microbiota, enhanced immunity, and holistic wellbeing. However, competition exists for such health claims between soluble fibres and, in Europe—where specific prebiotic claims are highly-restricted—from insoluble fibres and whole-grain ingredients, which also deliver dietary fibre claims.

Europe and China represent major supply regions for these ingredients, and, have felt the strain during the Covid-19 pandemic, due to production limitations and trade disruption. While these pressures are now easing as we exit the pandemic era, on-going inflationary pressures and high energy costs are having their impact on production of energy intensive ingredient formats, such as powder.

These are just a few of the market impactors that will be investigated and assessed in Giract's Inulin, FOS, and Soluble Corn Fibre Markets and Opportunities 2022-2027 study. Giract is well-placed to conduct such a comprehensive assessment of these markets; it has published a series of studies on soluble and insoluble fibres - 2004, 2009, 2013, 2015, 2018, 2021, and 2022. In addition, it has undertaken several confidential projects in this sector. With its deep knowledge of the markets, and its 360° research methodology, this study represents an invaluable resource for market participants to succeed in the current market turmoil.

**OBJECTIVES**

To provide:

- Manufacturer profiles and production estimates (t/kt) by type for inulin, FOS, and soluble corn fibre
- Import, export, and availability data (t/kt) by type and raw material
- Indicative pricing and pricing drivers by type, and raw material
- Current (2022) demand by application, type, and raw material
- Profiles of major end-use companies by region
- Forecast (2027) demand by application type, and raw material.
- Analysis of the why/why not for use of inulin, FOS, soluble corn fibre by type, present end-user feedback on advantages, challenges, pitfalls, anticipated future use, supply, sourcing challenges, etc.

**PRODUCTS**

Inulin; FOS: Powder 60-89%, 90%+; FOS syrup; soluble corn fibre (resistant dextrin/maltodextrin): below 70%, 70-90%, 91%+\*

*Data will be presented for sucrose-derived (type 1) and inulin-derived (type 2) FOS; soluble corn fibre by source raw material (eg. corn, tapioca, etc). \*% fibre content.*

**END-USE**

Dairy, Dairy Alternatives, Sports and Performance Beverages, Nutritional Bars, Meal Replacers/Slimming Products, Clinical Nutritional, Medical Foods, Bakery/Cereals/Cereal Bars, Infant Formula/Baby Foods, Other Foods, Pet Food, Animal Food, Dietary Supplements

**MARKETS**

Supply & Demand: Europe (EU27+UK+NO+CH), North America (USA, Canada), India, China

**TIMESCALE**

Current markets, 2022; Forecast demand markets, 2027.

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**SUBSCRIPTION**

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