

Business Review

Maltodextrin & Dry Glucose Syrup in Food Applications

GLOBAL - SUPPLY AND DEMAND PATTERNS

2021 - 2026

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 replacers for many traditional ingredients, such as emulsifiers and chemically-modified starches. Clean-label is a broad term, used principally in a B2B environment, to describe characteristics of ingredients. Clean-label has a broad range of interpretations, including short ingredients lists; no E numbers; ingredients that consumers recognise (kitchen ingredients in popular parlance); natural; not synthetic/artificial. The clean-label trend has become more prominent across Europe, with 78% of consumers considering health claims and ingredient lists before making a purchase. This has created a great opportunity for food manufacturers to build products with a clean and simple label into their portfolios, and has increased scope for clean-label ingredients and replacers for ingredients such as maltodextrin and dry glucose syrups. Maltodextrins and dry glucose syrups are a versatile range of products used for bulking, texture, and sweetness in food products. They find increasing use in products ranging from ice cream and frozen items to baby food, soups and sauces, and as a carrier for flavors and other food ingredients. Maltodextrin is perceived as highly-processed and overly-refined. Through physical/pressure treatments and controlled germination of rice, Cargill and Paragon Pure, respectively, have introduced clean-label alternatives to maltodextrin. Other products, including heat-treated flours are also being explored in various applications. Giract is undertaking a comprehensive study to explore supply and demand of maltodextrins and dry glucose syrups and their clean label replacers in food applications. Giract is well-placed to complete such a project given its substantial work in the field of starch derivatives and sweeteners.

OBJECTIVES To provide a comprehensive understanding of the supply and demand structure of the global markets for maltodextrins and dry glucose syrup in the food sector. This will include the following:

- Analysis of the current production volumes of these ingredients by manufacturer
- Trade and availability volumes
- Indicative prices (derived from supply and demand)
- Current demand and forecast volumes for the products by application
- Identification and evaluation of clean label maltodextrin alternatives in market
- End-user perspectives
- Actionable recommendations

PRODUCTS Low DE maltodextrin/dextrin (DE 3–9), Medium DE maltodextrin (DE 10–17), Standard DE maltodextrin (DE 18–20), Dry glucose syrup (DE 20–40), and clean label replacers

MARKETS North America (USA, Canada, Mexico), Europe (EU27, UK, Norway, Switzerland), Asia (China, India, Thailand, Indonesia, Vietnam), LATAM (Brazil, Colombia, other LATAM)

SECTORS Soups, Sauces, Thickeners, Baby foods, Baked goods, Tabletop sweeteners, Beverages, Ice creams, Carrier applications for flavors/food ingredients, Other applications, where observed

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