

Business Review

Starch Dry Hydrolysates – Post COVID scenario

SUPPLY/DEMAND/FORECASTS

2021/22 – 2026/27

INTRODUCTION

Dry hydrolysates of starch are used in several applications. They are largely sweeteners but also perform structural functions in many food matrices. Dextrose monohydrate finds application in a variety of foods as an indulgence promoter (sweet, anti-crystallization, freezing point depression) and as an energy contributor. The reduction of water content in anhydrous dextrose makes it more stable and amenable to a variety of functions in pharmaceutical formulations. It is an excipient performing both filler and binder roles in swallowable/chewable/effervescent tablets and medicated confectionery. Maltodextrin is 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.

During COVID, its aftermath and till date there have been enormous changes in the global economies, as also the food and beverage markets. Heavy pressure on production due to restrictions and demand being maintained in specific sectors caused an increase in prices. This was further sustained due to unfavourable political conditions until 2022. Giract is now witnessing a return to pre 2022 prices, and the jury is out on a return to pre COVID prices. If this happens, the influence of other consumer trends such as “clean label” will begin to show in demand trends.

Giract has completed two studies covering the dry hydrolysates of starch in 2022 and 2023. Combining these two to offer a comprehensive picture of the changes that have happened and forecast to happen, Giract presents the current study. Base year, forecast and regional scope remain the same as the distinct studies, pulled together by a comprehensive executive summary containing the changes that happened in 2022. This is a must read for all active players in this field.

OBJECTIVES

The key objectives of the report are:

- Analysis of the current production volumes of these ingredients by manufacturer
- Trade and availability volumes (production + import – export)
- Indicative prices (derived both from supply and demand)
- Current demand and forecast volumes for the products by application.
- End-user perspectives
- Comprehensive executive summary covering changes in the market over the past year.

PRODUCTS

Low DE maltodextrin/dextrin (DE 3–9), Medium DE maltodextrin (DE 10–17), Standard DE maltodextrin (DE 18–20), Crystalline dextrose monohydrate and Crystalline dextrose anhydrous.

SECTORS

Dextrose – Food (split by key sectors), Pharmaceuticals and other non-Foods.

Maltodextrin – Soups, Sauces, Thickeners, Baby foods, Baked goods, Tabletop sweeteners, Beverages, Ice creams, Carrier applications and other non-foods.

MARKETS

North America (USA, Canada, Mexico), Europe (EU27, UK, Norway, Switzerland), Asia (China, India, Thailand, Indonesia, Vietnam), LATAM (Brazil, Colombia, other LATAM), MEA (UAE/KSA/Africa), Row.

TIMESCALE

Current estimates for 2021/22, forecasts to 2026/27

SUBSCRIPTION

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