

Added-value Savory Intermediates Europe, North America, and selected Asia Supply/Demand/Forecasts 2022 – 2027

INTRODUCTION The markets for added-value savory intermediates are undergoing transformative change. The Covid-19 pandemic has disrupted production, particularly in China, where factory shutdowns have been severe reducing availability in many parts of the world. Supply chain disruptions have added to supply bottlenecks. In Europe and North America supply market consolidations have also contributed to the changing landscape. The rapid expansion of the meat analogs market, as well as the burgeoning healthy snacking and exotic cuisine trends, have driven demand for complex, yet clean-label, flavors, historically the preserve of added-value savory intermediates.

Giract has been researching the global value-added intermediates markets since 1990 and has produced many ground-breaking studies in Europe, North America, and Asia. It is now undertaking a complete reanalysis of the markets to assess the impact of all these trends, and more, on added-value intermediates.

OBJECTIVES To provide a complete understanding of the markets for added-value savory intermediates through provision of the following:

- Production by manufacturer (tons) of process flavors meat seasonings, snack seasonings, and breading and batter premixes by ingredient type and region
- Trade and availability (tons) of these added-value savory intermediates
- Legislation by region
- Indicative pricing by region and intermediate type
- Current demand (2022; tons) by application and region
- Forecast demand (2027; tons) by application and region
- Complete market analysis of the impacts of Covid-19, clean-label trends, raw material sourcing, supply chain/logistics complications, etc. on the outlook for value-added intermediates.

PRODUCTS Process flavor keys (building blocks). Estimates of finished process flavoring containing process flavor keys are provided.

Meat seasonings

Snack seasonings

Breading and batter premixes

END-USE Soups, bouillon/stock cubes, sauces, noodles, ready meals, savory snacks, processed meat, meat analogs, and pet food

MARKETS Europe (EU27+UK+NO+CH), North America (USA, Canada), Selected Asia (China, India, Indonesia, Thailand, Vietnam, and the Philippines)

TIMESCALE 2022 – 2027

PROGRAMME Following an initial review of Giract's in-house data, interviews with key players (producers, blenders, and users) are the dominant element of the study in order to derive a real understanding of the market

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