

## Business Review

**Lecithin in North America**

SUPPLY/DEMAND/FORECAST/TRENDS FOR USA, CANADA, MEXICO

2017 - 2022

**INTRODUCTION**

With the increased focus on natural and clean label in packaged foods, it is no surprise that lecithin has remained the bellwether of the emulsifier world. A gamut of emulsifiers is available for the food formulator, but lecithin is the sole natural emulsifier among them. Multiple sources (soy, canola, sunflower and egg) provide the flexibility for labels that need to claim non-GMO or allergen free. Fractionated lecithins are also used as supplements for health benefits, allowing its presence on the label to be considered beneficial by consumers. Helios, a data analytics platform from CircleUp, links the presence of lecithin on the label to an 89% higher rating for packaged food products.

Manufacturers seek to offer the entire range of lecithins, so as to retain their market share. Cargill received a GRAS certificate for its canola lecithin in late 2017 and quickly added the de-oiled version to its portfolio, and launched it in Europe in early 2018. The comparable functionality of this lecithin to other more established soy and sunflower lecithins was projected at the launch.

Lecithin is not without its issues though. While GM and allergy have largely been addressed by the sunflower and canola sourced lecithins, it still faces competition from other texturizers. Glanbia recently launched a solution for increasing dispersibility in beverages by acting upon the protein component called BevEdge. This is directly positioned against lecithin, allowing a clean-up of labels. On the other hand, systems based on sunflower lecithin, locust bean gum and guar gum are able to replace MDG/DMG and cellulose gums in many complex textural products such as yogurts and sauces.

To understand the dynamics of this market, and to track the supply and demand for lecithins in North America, Giract has launched this multi-client study after successful edition in 2014 and 2015. To a player interested in this market, this study is a ready tool for decision enabling information.

**OBJECTIVES**

The objective is to understand the market for lecithin in North America, which leads to the following sub-objectives –

- To identify the producers and key suppliers (importers/distributors of lecithin) with their capacity where available and actual production/supply in 2017
- To calculate availability based on production + import – export = availability for the different sources (soy, sunflower, canola, egg)
- To differentiate this availability by fluid, de-oiled and fractionated lecithin
- To estimate market shares of the key suppliers in the three countries
- To split the demand by key demand sectors by source of lecithin
- To have in-depth discussions with users of lecithin to identify and elucidate qualitative trends affecting purchase decisions
- To forecast the demand for lecithins by source to 2022 based on these trends

**PRODUCTS**

Lecithin, differentiated by source – soy, sunflower, canola and egg

Lecithin differentiated by type – fluid, de-oiled and fractionated

**MARKETS**

Food (bakery, chocolate, margarine, ice-creams, baby foods, others), Supplements, Feed, Non-food (detergents, cosmetics, pharmaceuticals)

**GEOGRAPHY**

USA, Canada and Mexico

**TIMESCALE**

Current 2017 with forecast to 2022

**SUBSCRIPTION**

EUR #####

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# Lecithin in North America - Supply/Demand/Forecast/Trends for USA, Canada, and Mexico, 2017/18 - 2022

REPORT

September 2018

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