

## Business Review

## Next Generation Clean-Label Emulsifiers

SUPPLY/DEMAND/FORECASTS/TRENDS

2020 - 2025

**INTRODUCTION** Emulsifiers have long been a mainstay of the food and beverage industry, providing stable emulsions across a wide range of end-product categories.

Rising consumer demand for clean-label ingredients, which are typically perceived by consumers as traditional and healthy, has driven development of clean-label emulsification solutions. Recent advances include the development of functional proteins (Solanic; Avebe), insoluble fibres (Citri-Fi; FibreStar); enzyme blends (POWERBake; DuPont); and broth ingredients, such as chickpea broth (Evanesse; Ingredion).

However, the rise of this new generation of clean-label emulsifiers has coincided with the emergence of Covid-19. This global pandemic has foregrounded the following consumer trends as the key market drivers: price, food safety and security, health and wellness, and immunity-boosting. Price pressure, imposed on consumers by the on-going uncertainty surrounding the pandemic, appears to conflict with the health and wellness and immunity-boosting trends, which align more closely with the prevailing clean-label drivers. Furthermore, consumer stockpiling has illustrated the requirement for product stability and shelf-life extension, increasing demand for emulsifiers in many applications.

There is significant development of clean-label emulsifiers, both new ingredients, such as functional proteins, fibres, enzyme blends, and broths, as well as emulsifiers yet to gain market presence. This study will explore the opportunities for this next generation of emulsifiers. From patent analysis through to interviews with start-ups, and academic/industrial collaborations, we will identify and profile these ingredients, and explore their functionality, advantages, and potential pitfalls. The study will serve to indicate the winners and losers amongst this next generation of clean-label emulsifiers, and provide projected market penetrations of each.

**OBJECTIVES** The main objective is to provide an in-depth understanding of the next generation of clean-label emulsifiers. This will include the following sub-objectives:

- Identify and profile next generation emulsifiers (patent analysis, start-up companies, academic/industrial research, etc.)
- Explore potential applications, advantages, and pitfalls of these emulsifiers
- Provide supply and demand market sizes for new and established emulsifiers
- Derive potential market penetration (2025) for next-generation emulsifiers
- Identify likely winners and losers (2025) amongst the next generation of clean-label emulsifiers

**PRODUCTS** **CLEAN-LABEL EMULSIFIERS** Nascent and currently under-development emulsifiers, including proteins (pea, soy, fava, others), fibres (citrus, apple, others), enzyme blends, ingredient blends, Others to be identified

**ESTABLISHED EMULSIFIERS** Lecithins (soy, sunflower, others), Ammonium phosphatides, MDG and DMG, DMG esters (Datem, etc.), Polyglycerol/Propylene glycol esters, Stearoyl lactylates (CSL/SSL), Sorbitan esters/polysorbates, Sucrose esters and sucroglycerides

**SECTORS** Bakery & Cereals; Confectionery; Dairy; Beverages; Ready Meals; Processed Meat and Fish; Meatless Foods; Soups; Seasonings; Dressings & Sauces; Snacks; Syrups & Spreads; Margarine; Infant Nutrition; Sports and Performance Nutrition

**MARKETS** USA/Canada/Mexico; Brazil; Europe (EU27 plus UK/Norway/Switzerland); China; India; Saudi Arabia; United Arab Emirates; Asia-Pacific (Indonesia, Malaysia, Philippines, Singapore, Thailand); RoW (including Russia, Ukraine, Australia, South Korea, Vietnam, South Africa, Japan and Other LATAM)

**TIMESCALE** Current: 2020; Forecast (demand): 2025

**PUBLICATION** March 2021

**SUBSCRIPTION** #####

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