

Business Review of Savory Ingredients in the MEA Region Supply/Demand/Forecasts 2012 – 2016

INTRODUCTION

Giract has been researching the global savory ingredients and value added intermediates markets since 1990 and has produced many ground breaking studies in Europe, North and South America and Asia. The Middle-East/Africa region is currently growing rapidly, and thus offers significant opportunities for savory ingredients. But this region is also very complex and often traditional in nature, and hence demands a careful examination.

Sales of packaged and processed foods across the Middle East alone are forecast to increase by 11% in 2012 to USD 52 billion. There is a rapid change-over from fresh food to processed food in these countries, and western products such as soups and snacks are increasingly popular, particularly amongst the youngsters, who travel considerably more and who are now also exposed to global television and the internet.

Giract has just published its latest study covering these key ingredients. Questions addressed include 'Are end-user companies in these countries fully briefed on the suitability of the different savory ingredients?', 'Are there local customs and habits which are either in favour of or against the usage of these ingredients?', 'What future growth rates can be expected for each of these ingredients across this vast region and why?', etc.:

OBJECTIVES

- To analyse the supply scenario in each key country/region
- To review the legislative requirements and import tariffs
- To estimate the real market size and trend in the relevant food sectors
- To identify the factors for and against change influencing food formulators who are using, or who could use, these ingredients and thus any future opportunities for the relevant ingredient manufacturers
- To evaluate the current market (volume and value) for the selected savory ingredients, and derive volume forecasts of market size to 2016

PRODUCTS

Ingredients and flavors:

Yeast extracts (YE) (brewers', baker's and torula), Hydrolysed vegetable protein (HVP), Hydrolysed animal protein (HAP), Monosodium glutamate (MSG), Nucleotides.

End-products:

End-product sectors include:

Food sectors: soups, bouillon/stock, sauces/gravies, instant noodles, seasonings for savory snack foods, seasonings for processed meat/ready meal, bakery

Non-food sectors: petfood, animal feed, fermentation (the majority of use in non-food sectors concerns only yeast ingredients). These sectors are unlikely to play an important role in this region currently, but Giract examined the potential for these sectors in this region.

Demand estimates and forecasts by ingredient are derived per end-use sector.

GEOGRAPHICAL

Supply: Key players in the selected countries in the MEA region are covered – since there is no significant manufacture of these ingredients in this region currently, the relevant traders in each key country have been approached to understand the complex market dynamics.

Demand: MEA – with focus on **Turkey, Egypt, Saudi Arabia, United Arab Emirates, Nigeria and South Africa.**

TIMESCALE

2012 – 2016

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 forces.

PUBLICATION

March 2013.

**Savory Ingredients
M.E.A Countries
Supply/Demand/Forecasts
2012-2016**

MULTICLIENT REPORT

March 2013

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TURKEY - SAMPLE REPORT PAGES

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2. TURKEY

2.1. INTRODUCTION

The population has grown at a rate of ### Text edited

Population trend					mio	
	2008	2009	2010	2011	2012	AAGR%
Turkey	###	###	###	###	###	###

Source:

GDP growth rate in Turkey was estimated at ###% in 2012 compared to a historical trend of ### Text edited % AAGR between 2006 and 2011.

2.2. INDUSTRY STRUCTURE

2.2.1. FOOD INDUSTRY

The growth of the processed food industry is believed to be dependent on population growth and economic development.

2.2.1.1 LIQUID SOUPS

Market Size and Growth

Liquid Soups – Turkey				kt	
	2006	2012	AAGR% 2006–2012	2016	AAGR% 2012–2016
### Table edited	###	###	###	###	###
Chilled Soup					
Frozen Soup					
Foodservice					
Total					

Source:

The total market, in volume terms, is expected to ### Text edited

Liquid Soups – Turkey Players and Market share 2012

	Retail	Foodservice
### Table edited	###	###
###		
Others		
Total	100%	100%

Source: Giract, based on interviews

Processed Meat Consumption – Turkey

	2006 kt	2012 kt	AAGR% 2006–2012	2016 kt	% AAGR 2012–2016
Chilled Retail					
Chilled Food Service					
Frozen					
Total					

2.2.1.12

FOOD INDUSTRY GROWTH SUMMARY

Food Industry Sectors Growth Projections – Turkey

	Historical Growth AAGR % 2007–2012	Future Growth AAGR% 2012–2016
Liquid Soup	### Table edited	
Dehydrated Soup		
Stock and Bouillon		
Dry Sauces and Gravy		
Wet Sauces		
Instant Noodles		
Ready meals		
Snack foods		
Processed Meat		

Source: Giract

2.2.2. NON FOOD INDUSTRY

2.2.2.1 PETFOOD

Pet Dog & Cat Population

Petfood Consumption – Turkey kt

	2006	2012	AAGR% 2006–2012	2016	AAGR% 2012–2016
Cat & Dog Food	###	###	###	###	###

Source:

Petfood is expected to continue to grow by **### Text edited** % per annum.

Petfood Producers and Market Share – Turkey 2012

Producers	Market Share
### Table edited	
??????	
Others	
Total	100%

Source:

2.2.2.2 ANIMAL FEED/FERMENTATION

2.3. FOOD LEGISLATION

2.4. YEAST EXTRACT

2.4.1. LEGISLATION & CUSTOMS DUTIES

Text edited

2.4.2. PRODUCERS/DISTRIBUTORS

Text edited

2.4.3. TRADE AND AVAILABILITY

Yeast Extract Availability All Types 2012 tons dsb

	2012
Production	### Table edited
Imports	###
Exports	###
Availability	###

Source: Giract – based

2.4.4. PRICES

Typical prices for Yeast Extract

Product	Price TRY/kg
Baker's YE powder	###
High nucleotide YE	###

Source: Giract based on interviews

2.4.5. DEMAND

2.4.5.1 DEMAND OVERVIEW

Current Demand by Application Area for YE, All Types, 2012 tons dsb

Sector	Brewers'	Baker's	Torula	Total
Total demand				### Text edited
Industrial food demand				
Liquid soups				
Dehydrated soups				
Bouillon & stock				
Sauces & Gravies				
Dehydrated Noodles				
Ready Meals				
Snack Seasonings				
Meat Seasonings				
Bakery				
Other food industry				
Non-food demand				
Fermentation				
Process flavors				

Source: Giract, based on interviews

2.4.5.2

DEMAND FORECASTS

Forecast Demand By Application Area for all YE types

tons dsb

Sector	2012	2016 Forecast	AAGR%
Total demand		### Table edited	
Industrial food demand			
Liquid soups			
Dehydrated soups			
Bouillon & stock			
Sauces & Gravies			
Dehydrated Noodles			
Ready Meals			
Snack Seasonings			
Meat Seasonings			
Bakery			
Other food			
Non-food demand			
Fermentation			
Process flavors			

Source: Giract, based on interviews