

## Business Review

## Changing World in Antimicrobial/Antifungal Preservatives

USA, EU28, CHINA, INDIA, BRAZIL, ASEAN, SAUDI ARABIA, UAE, ROW

2018 – 2023

**INTRODUCTION** The range of antimicrobial/antifungal ingredients/additives in the food is changing all the time. Both the US and European markets are in need of “clean labels”, whilst Legislative Authorities are seeking greater food safety and thus reducing the use of some traditional products. Often hurdle technologies are being introduced to reconcile these demands. The preservative industry has been witnessing some turmoil as a reflection of consumers’ desire for ‘natural’ products. Thus, even within the acidulants category, food producers tend to opt for ‘natural’ products. On the other hand, the ‘ultra-natural’ ingredients such as fermentates and polylysine have not lived up to their initial promise across sectors. A number of current chemical preservatives – sorbic, benzoic and hydroxybenzoic acid derivatives – are continuously under threat, but these have significant potential in the developing countries. Even more important, the consumer (encouraged by the major retailers) believes that ‘natural is good’ and ‘chemical is bad’. Thus, the search for ‘clean labels’ dominates formulation in many higher added-value food categories in the developed countries.

Giract, the ingredients and technologies market research and consultancy specialist has studied the market size, shape and opportunities for the various key food/feed-grade preservatives, most recently in 2014. The new study will thus focus on the changing dynamics towards the demand for ‘natural’ and ‘clean label’ ingredients.

- OBJECTIVES**
- To review current and potential products, their specifications, food applications, limitations, price implications in typical recipes
  - To understand the legislative situation in the USA, EU, China, India, Brazil, ASEAN, Saudi Arabia, UAE
  - To analyse the producers, their strategies for developing these products, estimated production
  - To appreciate the “why” and “why not” concerning the use of various antimicrobials/antifungal preservatives based on in-depth interviews with end-users, covering the different aspects (functional, ‘natural’, labelling and health)
  - To identify 2018 food market size and demand forecasts for 2023 in each region

**INGREDIENTS** Benzoates, Sorbates, Acetates, Lactates, Lactic acid, Propionates, Nitrates, Sulphites, Nisin, Natamycin, Fermentates, Lactoferrin, Lysozyme, Others – any commercially significant products identified during the research will be included

**GEOGRAPHY** USA, EU28, China, India, Brazil, ASEAN, Saudi Arabia, UAE, RoW

**USER SECTORS** Processed meat and fish, bakery and cereals, spreads, dairy, ready meals, sauces dressings & dips, beverages and other food applications

**TIMESCALE** 2018 – 2023

**SUBSCRIPTION** EUR 32550

**PUBLICATION** November 2018

**PROGRAMME** Following an initial review of Giract’s in-house database, the key element of the study will be in-depth interviews with major players (producers and users) to derive a real understanding of the driving forces including the possible impact of the functional, ‘natural’, health and other aspects of the products.

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