

India Food Emulsifiers Market By Type (Lecithin, Mono- & Diglycerides and Derivatives, and Others), By Source (Plant Source and Animal Source), By Functionality (Emulsification, Starch Complexing, Protein Interaction, and Others), By Application (Bakery Products, Confectionery, Convenience Foods, Dairy Products, and Others), By Region, Competition, Forecast & Opportunities, 2028F

Market Report (3 business days) | 2023-09-05 | 100 pages | TechSci Research

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Report description:

India's Food Emulsifiers Market was valued at USD 210.10 million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 4.42% through 2028. India's Food Emulsifiers Market is anticipated to grow significantly rate in the projected period of 2028. The emulsifiers market in India has been witnessing substantial growth in recent years. Emulsifiers play a vital role in various industries, including food and beverages, cosmetics, pharmaceuticals, and personal care products. They are used to stabilize emulsions, enhance texture, improve shelf life, and provide other desirable properties to products. The Indian emulsifiers market has seen a surge in demand due to factors such as changing lifestyles, increasing disposable incomes, urbanization, and the growing awareness of health and wellness among consumers.

Key Market Drivers

Growing Usage in the Food and Beverage Industry is Propelling the Market

Emulsifiers are substances that help stabilize and blend two immiscible components, typically oil and water, to form a stable emulsion. Emulsifiers act as binding agents, ensuring that oil and water stay blended for an extended period. One of the primary functions of emulsifiers in the food and beverage industry is to enhance texture and stability. In products such as mayonnaise, sauces, and salad dressings, emulsifiers help achieve a smooth and creamy texture by preventing oil and water from separating. They impart a desirable mouthfeel and prevent the formation of unappetizing clumps or lumps. Moreover, emulsifiers improve the stability of emulsions, ensuring that the product maintains its consistency over time, even during storage. As per the India Brand Equity Foundation (IBEF), India's food and beverage industry currently stands at USD 40.3 billion and is expected to touch USD

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66.3 billion by 2018, registering a growth rate of 18 percent. Furthermore, Emulsifiers play a crucial role in extending the shelf life of various food and beverage products. By maintaining the stability of emulsions, emulsifiers prevent spoilage, microbial growth, and rancidity. They create a protective barrier around the dispersed oil droplets, preventing oxidation and maintaining the freshness of the product. This is particularly important in baked goods, margarine, and confectionery, where extended shelf life is essential for consumer satisfaction and reduced food waste. They also contribute to the development of low-fat and reduced-calorie food products. They enable the incorporation of water or other low-fat ingredients into formulations, mimicking the texture and mouthfeel typically provided by higher fat content. Emulsifiers create stable emulsions with reduced fat content, allowing manufacturers to offer healthier alternatives without compromising taste and sensory attributes. Reduced-fat spreads, light salad dressings, and low-calorie beverages are examples of products benefiting from emulsifiers' fat-reduction capabilities. In addition to emulsion stabilization, emulsifiers also function as texture modifiers and structure builders. They influence the formation of foams, gels, and aeration processes in various food applications. For example, emulsifiers contribute to the stable foam structure in whipped creams, mousses, and meringues, enhancing the visual appeal and mouthfeel of these products. As per the India Brand Equity Foundation (IBEF), The market size of India's beauty, cosmetic, and grooming market will reach \$ 20 billion by 2025 from the current \$ 6.5 billion on the back of a rise in disposable income of the middle class and growing aspirations of people to live a good life and look good, according to ASSOCHAM. To suit consumption across different levels of purchasing power, FMCG companies are coming out with a variety of products in different price ranges. They also play a role in cake batters, contributing to their structure and moisture retention during baking. Emulsifiers find applications in a diverse range of food and beverage products. They are used in dairy products such as ice creams, yogurts, and processed cheeses to create smooth textures and prevent ice crystal formation. In bakery products, emulsifiers improve dough stability, volume, and shelf life. Chocolate and confectionery items rely on emulsifiers for homogenous mixing, smoothness, and prevention of fat bloom. Furthermore, emulsifiers are used in meat products, beverages, soups, and ready-to-eat meals, among others, to enhance stability, texture, and sensory attributes.

Increased Consumption of Emulsifier Based Products is Spurring the Demand of Overall Market.

Emulsifiers ensure the stability of cosmetic products by forming a protective layer around oil droplets, preventing coalescence, and slowing down creaming or sedimentation. This ensures that the product remains homogeneous throughout its shelf life. Emulsifiers play a significant role in determining the texture and sensory attributes of cosmetic products. By carefully selecting and formulating with emulsifiers, manufacturers can create a range of luxurious textures, from light and silky to rich and creamy, enhancing the user's experience. They can also improve the efficacy of cosmetic formulations by enabling the incorporation of active ingredients that are incompatible with the base formula. They help solubilize hydrophobic actives, such as vitamins, antioxidants, and plant extracts, allowing their effective delivery to the skin. Moreover, with the growing demand for natural and sustainable cosmetic products, natural emulsifiers have gained popularity. Examples include lecithin, beeswax, and plant-derived emulsifiers like cetearyl olivate and sorbitan olivate. Also, Silicone-based emulsifiers offer unique sensory characteristics and are commonly used in skincare and haircare products. They provide a smooth, silky feel and can enhance the spreadability and delivery of active ingredients. Polymeric emulsifiers, such as carbomer and acrylate copolymers, provide exceptional stability and are often used in high-viscosity products like creams and gels.

Key Market Challenges

Fluctuations in Prices of Raw Materials

Raw materials used in food emulsifiers are primarily sourced from natural origins, including vegetable oils, fats, and proteins. The prices of these materials are susceptible to market volatility, influenced by factors like climate change, geopolitical events, and global supply and demand shifts. Fluctuations in raw material prices can be substantial and unpredictable, resulting in a series of challenges for the Indian food emulsifiers market. Significant price fluctuations can disrupt the supply chain, resulting in production and distribution delays. Manufacturers may encounter challenges in procuring reliable and cost-effective raw materials, impacting their capacity to meet market demand and fulfill customer expectations. Moreover, uncertainty in the prices of raw materials can impede research and development endeavors. Manufacturers may exhibit reluctance in investing in cutting-edge formulations or novel product development owing to the uncertainty surrounding future costs.

Disruptions in Supply Chain

Efficient logistics and transportation play a critical role in ensuring the timely delivery of emulsifiers to food manufacturers.

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Challenges such as poor infrastructure, traffic congestion, and insufficient cold chain facilities can result in delays and compromise product quality, impacting both manufacturers and consumers alike. The food industry is governed by rigorous regulations aimed at safeguarding consumer safety. Alterations in labeling requirements, quality standards, or import/export regulations can have an impact on the cross-border movement of emulsifiers, resulting in bottlenecks in the supply chain. Furthermore, the COVID-19 pandemic unveiled vulnerabilities in global supply chains. The implementation of lockdowns, restrictions, and disruptions in international trade underscored the imperative for resilient supply chain management to guarantee the uninterrupted flow of essential ingredients.

Key Market Trends

Stringent Regulatory Landscape

In recent years, there has been a discernible shift in consumer preferences towards cleaner and more natural ingredients. This trend has prompted regulatory bodies to closely examine the use of artificial additives, such as emulsifiers, in food products. The Food Safety and Standards Authority of India (FSSAI) has taken a leading role in ensuring that emulsifiers used in Indian food products adhere to safety standards and are accurately labeled. Regulatory authorities in India have been proactive in enhancing labeling requirements for food products, including emulsifiers. Regulatory agencies are placing a strong emphasis on ensuring that food emulsifiers meet rigorous safety and quality standards. This growing trend incentivizes manufacturers to implement best practices in production, storage, and distribution, guaranteeing the safety of emulsifiers throughout their shelf life. In a world that is becoming more interconnected, it is essential for trade and export opportunities to align with international food standards. Regulatory authorities in India are diligently working towards harmonizing their regulations with global benchmarks. This approach enables emulsifier manufacturers to access international markets while upholding the utmost commitment to stringent quality and safety criteria.

Sustainability and Environmental Concerns

Sustainable practices encompass a strong emphasis on waste reduction. Emulsifier manufacturers are actively investigating strategies to minimize packaging waste and integrate circular economy principles, including recycling and upcycling, into their operational frameworks. Water scarcity is a pressing global issue, and the food industry plays a significant role in water consumption. Companies operating in the food emulsifiers market are actively adopting water-efficient technologies and practices to minimize their water usage and contribute to water conservation efforts. Furthermore, an emerging trend observed in the food industry, particularly within the emulsifiers sector, is the heightened focus on ethically sourced ingredients. Companies are progressively scrutinizing their supply chains to guarantee responsible sourcing of raw materials, thereby avoiding any involvement in deforestation, habitat destruction, or unethical labor practices.

Segmental Insights

Type Insights

In 2022, the food emulsifiers market was dominated by lecithin and is predicted to continue expanding over the coming years. Lecithin is a naturally derived emulsifier that can be sourced from plants like soybeans and sunflower seeds, as well as animal products like egg yolks. In today's market, where consumers are increasingly seeking natural and clean-label ingredients, lecithin emerges as a prominent choice that is recognizable and well-received by consumers. It perfectly aligns with the escalating demand for transparent and minimally processed products. Lecithin's exceptional emulsification properties make it a versatile ingredient in a wide range of food applications. It helps stabilize oil-water mixtures, preventing separation and ensuring uniform texture and mouthfeel. This versatility allows manufacturers to use lecithin in products such as baked goods, confectionery, dairy, beverages, and processed foods. Moreover, lecithin's emulsification properties also play a crucial role in extending the shelf life of food products. By preventing the separation of ingredients, lecithin helps maintain the quality and freshness of products over an extended period.

Application Insights

In 2022, the food emulsifiers market was dominated by the bakery products segment and is predicted to continue expanding over the coming years. The rapid urbanization of India has brought about shifts in dietary patterns. With the increasing number of individuals migrating to urban regions and embracing busier routines, there has been a significant rise in the demand for convenient and ready-to-consume bakery goods. Emulsifiers play a crucial role in improving the texture, shelf life, and overall quality of these products, making them indispensable for manufacturers. Bakery products have a wide appeal among consumers

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in India, encompassing various age groups and income levels. This diverse consumer base creates a consistent and stable demand for bakery items, thereby emphasizing the necessity of emulsifiers to enhance their quality and characteristics. Moreover, the bakery industry in India has witnessed significant innovation and product diversification. Manufacturers are constantly introducing new flavors, formats, and healthier alternatives to cater to evolving consumer preferences. Emulsifiers enable bakers to experiment with formulations, resulting in a wide variety of bakery products that continue to capture consumer interest.

Regional Insights

The West India has established itself as the leader in the India Food Emulsifiers Market. The western states of Gujarat and Maharashtra are renowned for their major ports, such as Mumbai, Kandla, and Mundra. These ports play a pivotal role in facilitating the efficient import and export of raw materials and finished products. This accessibility greatly contributes to a streamlined supply chain for emulsifiers, enabling manufacturers in this region to effortlessly procure raw materials and efficiently distribute their products nationwide. The western region of India exhibits a robust food processing industry, encompassing sectors such as dairy, bakery, confectionery, and ready-to-eat foods. These industries extensively utilize food emulsifiers to elevate the quality and desirability of their products. West India has a diverse food culture, with a variety of traditional and modern food products. This diversity creates a demand for a wide range of emulsifiers to cater to different culinary needs, contributing to a larger market size.

Key Market Players

- ADM Agro Industries India Private Limited
- Ingredion India Pvt. Ltd.
- KERRY INGREDIENTS INDIA PRIVATE LIMITED
- AAK India Private Limited
- Puratos India
- DSM India Private Limited
- Cargill India Pvt. Ltd.
- Corbion India Pvt Ltd
- BASF India Ltd
- SAVANNAH SURFACTANTS LIMITED

Report Scope:

In this report, the India Food Emulsifiers Market has been segmented into the following categories, in addition to the industry trends, which have also been detailed below:

□ India Food Emulsifiers Market, By Type:

- o Lecithin
- o Mono- & Diglycerides and Derivatives
- o Others

□ India Food Emulsifiers Market, By Source:

- o Plant Source
- o Animal Source

□ India Food Emulsifiers Market, By Functionality:

- o Emulsification
- o Starch Complexing
- o Protein Interaction
- o Others

□ India Food Emulsifiers Market, By Application:

- o Bakery Products
- o Confectionery
- o Convenience Foods
- o Dairy Products
- o Others

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□□India Food Emulsifiers Market, By Region:

o□North

o□South

o□West

o□East

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Food Emulsifiers Market.

Available Customizations:

India Food Emulsifiers Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

□□Detailed analysis and profiling of additional market players (up to five).

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