

GLOBAL MARKETS FOR RICE- BASED INGREDIENTS

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STRATEGIES TO GROW YOUR BUSINESS



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A global food ingredients company required insights into specific parts of the rice-based ingredients market. This information was required to inform its business planning strategy when integrating the product portfolio of a recent acquisition. CPL was able to provide in-depth market information on specific areas of interest.

Objective

The objective of this project was to provide insight to a client on the market for rice-based ingredients.

Background

The client was a global company which wanted to accelerate the growth of its rice product lines rapidly. It required a view of the potential rice ingredient market (*i.e.* flour, starch and protein) in EMEA. This included an understanding of how the industry is segmented, what the key success factors are, the overall potential for the business, existing opportunities and gaps which could be filled.

Method

The scope of the project was products derived from rice including:

- Glutinous/waxy Rice Starch and Rice Flour
- Modified Rice Starches
- Rice Proteins (including isolates)

The sector scope was:

- Food (including infant nutrition etc.)
- Personal Care

The project covered the market dynamics for rice based ingredients including:

- Market trends (e.g. in the use of gluten free ingredients across different product sectors)
- Players in the market and competing products (direct, indirect and potential), including differentiation, positioning and IP
- Recent research and developments
- End users (customers and their needs, market gaps)
- Key Success Factors and Barriers to Entry
- This included a qualitative segmentation by ingredient type, application, geography and customers. The final report was 341 pages with 143 tables and 50 figures and contained the following sections:

GLOBAL MARKETS FOR RICE-BASED INGREDIENTS

Objective & Scope

Method

- Forecasting and Market Sizing Methodology

Principal Findings

Rice Ingredients Markets

- Rice Protein Ingredients
- Rice Starch
- Rice Flour
- Other Ingredients from Rice

End-User Markets

- Infant Nutrition
- Sports Nutrition
- Gluten Free Markets
- Dairy Free & Lactose Free Markets
- Breadings and Coatings
- Meat Free Vegetarian and Vegan Markets
- Protein Enrichment & Organic Markets
- Clinical Nutrition Ingredients
- Cosmetics and Personal Care Applications

Key Success Factors

Conclusions

- General
- Rice protein
- Rice Functional Starches and Functional Flour
- Functional Rice Starch Markets
- Functional Flour Applications

Recommendations

Introduction

Rice Ingredient Products

- Rice Protein
- Starches
- Rice Flour
- Other Products from Rice

Markets for Rice-Based Ingredients

- Rice Protein Powder

Total Protein Ingredients Market

- Global Protein Ingredients Market
- Global Rice Protein Ingredients Market

Rice Starch Market

- Rice Starch Overview
- Rice Starch Market by Application

Rice Flour

- By Region
- By Application

Markets by Trends and Leading Applications

Market Summary Overview & Projections

- Starches and Flours
- Proteins

Infant Formula and Baby Foods

- Global Infant Formula Market
- Global Baby Food Market
- Organic Baby Food
- Use of Rice Ingredients

Sports Nutrition

- Market by Trends and Country
- Rice Protein in Sports Nutrition
- Sports Nutrition Ingredients

Gluten Free Market

- Food labelling
- Market Sizes and Trends
- Market for Rice based Ingredients by Application

Dairy-Free Market

Foodservice Use of Rice Flours and Starches

- Reformed Meat Including Ground Beef Burgers
- Further Processed Chicken
- Frozen Potato Chip Coatings

Meat-Free, Vegetarian and Vegan Markets

Protein Enrichment

- Healthy Eating
- Organic Markets
- Nutritional Fortification

Clinical Nutrition Ingredients for Ageing Populations

- Oral Nutrition Products
- Enteral Nutrition Products

Cosmetics and Personal Care

- By Region
- By Product
- Rice Bran Oils and Extracts
- Other Products from Rice

Players and Products

Food

Manufacturers

European Manufacturers

- 22 Companies

Chinese-Based Manufacturers Distributing in Europe

- 18 companies

North & South American Manufacturers

- 6 manufacturers

South and S. E. Asia Manufacturers

- 8 manufacturers

Distributors

European Distributors

- 18 Companies

North & South American Distributors

- 9 Companies

Asian Distributors

- 4 Companies

Cosmetics

Manufacturers

- 14 manufacturers

Formulators & Distributors

- 7 Formulators and Distributors

Contacts

Contacts Overview

- Markets & Price
- Competition and Competing Products
- Regulatory, Safety & Labelling

Contact Reports

- 41 Contacts interviewed

Appendix

Definitions for Baby Foods and Infant Formula Products

- Baby Milks
- Baby Food

News

Summary of Recent News Articles Published

- Rice Proteins
- Rice Starches & Flours
- Company Actions
- Contaminants
- Recent Research Developments

ADDITIONAL PROJECTS

In addition to this work on markets for rice-based ingredients, CPL has also worked on e.g., [starch in baking](#) and [modified starch](#) and [pulse-based ingredients](#). You can find further examples by browsing this site or using the search bar on this page. Have a look at our [PowerPoint Introduction](#) and Brochure describing deliverables, differentiators and case studies. You can also review [eight case studies](#).