

Industrial Enzymes Market - Global Outlook and Forecast 2020-2025

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Global Industrial Enzymes Market Report

The global industrial enzymes market by revenue is expected to grow at a CAGR of over 5.5% during the period 2019–2025.

The global industrial enzyme market is expected to witness growth during the forecast period because of the increased capacity of enzymes to replace synthetic chemicals and act as a viable source for biocatalysts. The need for eliminating organic solvents and the demand for low side-effects substances are driving the market growth. With the decline in 2020 owing to the COVID- pandemic, manufacturing, and distribution end-user industries have reduced the demand for enzymes. However, the market is expected to revive in early 2021, with the normalization of industrial activities. Changing dynamics and trends of food and beverage, detergents, and quality enhancements in the animal feed industry are further expected to drive the demand for new formulations during the forecast period.

The developments in protein engineering have led to the growing instability, specificity, economy, and overall application potential of enzymes across industries. With the rising beneficial activities of sustainable enzymes, the number of commercial applications is expected to further. Protease, carbohydrases such as amylase and cellulase are some of the widely utilized enzymes across industries.

The following factors are likely to contribute to the growth of the industrial enzymes market during the forecast period:

Rise in Demand for Biofuels

Preference for Lactose Free Dairy Products

Role of Enzymes in Cosmetics

Developments in Enzyme Engineering

The study considers the present scenario of the industrial fasteners market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspect of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Global Industrial Enzymes Market Segmentation

The global industrial enzymes market research report includes a detailed segmentation by type, source, end-users, geography. The carbohydrase segment is expected to reach close to USD 3 billion by 2025. Over 80% of vendors offer a minimum one form of carbohydrase such as amylase, xylanase, cellulase, pectinase that are eventually supporting for the leadership position. Amylase is considered to be a universal enzyme finding applications in food and beverage, biofuel, cleaning agents sectors. While pectinases are more prevalent in poultry feed, xylanases are the preferred choice for pre-bleaching of Kraft pulp. North America was the largest market for carbohydrase in 2019, accounting for 28% of the total share. The protease was the largest segment of the industrial enzymes market in 2019, accounting for 32.22% of the total share. Brewing, meat tenderization, baking, and milk coagulation, where plant-based protease is gaining momentum, are some of the major applications.

The food and beverage industry was the largest industry with a wide range of applications. Pectinases, xylanases, cellulases, and other carbohydrase continue to find adoption in the ever-expanding food and beverage trends. With the advent of lactose-free dairy products and plant-based alternatives, growth opportunities have further widened. The segment is expected to reach USD 2.00 billion by 2025. North America and the European region are considered as forerunners in adopting the latest food trends that are expected to grow during the forecast period.

Based on the source, microorganisms were the major revenue contributor, generating

USD 3.68 billion in 2019. Fungi tend to dominate the segment where species such as *Aspergillus* are utilized for extracting protease, which is the widely used industrial enzyme in 2019. Microbes are also the primary mode of choice for industries with respect to food preservation, stable composition requirements, affordability, and taste enhancements. The segment is expected to pose an absolute growth of 48% in APAC and 41% in Europe by 2025. The Middle East and Africa region are also likely to generate incremental revenue of USD 100 million during the forecast period.

Segmentation by Type

Carbohydrates

Amylase

Cellulase

Lactase

Pectinase

Others

Protease

Lipase

Phytase

Others

By Source

Plants

Animals

Microorganisms

By End-users

Food & Beverages

Cleaning Agent

Animal Feed

Biofuel

Textiles

Pulp & Paper

Others

Personal Care and Cosmetics

Leather

Wastewater and Others

INSIGHTS BY GEOGRAPHY

North America was the largest market for industrial enzymes in 2019, valued at USD 1.60 billion. The US is the major driver, with an increased demand for industrial enzymes and is likely to contribute to the market growth post-2020 following the supply chain disruption due to COVID-19. Vendors are recommended to focus on intensifying the distribution toward their end-user industries to maintain their market share. The region is expected to remain as the leader during the forecast period, where it is expected to generate over USD 2 billion by the end of 2025. Stringent regulations, dynamic food and beverage trends, policies for biofuel production, and a strong presence of global players are propelling the growth of the region.

By Geography

North America

US

Canada

Europe

UK

Germany

France

Italy

Spain

APAC

China

Japan

South Korea

Australia

India

Latin America

Brazil

Mexico

Middle East & Africa

South Africa

UAE

Saudi Arabia

INSIGHTS BY VENDORS

The global industrial enzymes market is fragmented, with many international and domestic vendors in each geography. Novozymes is estimated as the market leader with other key players such as DuPont, DSM, AB Amano, accounting for approximately 75% of the global share in 2019. The competitiveness of the industry is inclined toward new formulations in enzyme technology, extending the product line to cater to the existing demand-supply gap through protein engineering, mergers, and acquisitions to expand the global footprint, and other strategies to counter the global challenges through the concept of sustainability. Extending research and development activities for eco-friendly solutions for emerging industries can be foreseen among major vendors during the forecast period.

Prominent Vendors

Novozymes

DuPont

DSM

Amano Enzyme

Associated British Foods PLC

Other Prominent Vendors

BASF

Kerry

Megazyme

Noor Enzymes

Calzyme

BioSphere SRL

Codexis

Thermostable Enzyme Laboratory Co. Ltd.

Adisseo

Chr. Hansen Holding A/S

ENMEX

Advanced Enzymes

Lumis Biotech Pvt. Ltd.

Hayashibara Co., Ltd.

Aum Enzymes

Deerland Probiotics & Enzymes

Novus International

Creative Enzymes

KEY QUESTIONS ANSWERED

1. What is the market size of the industrial enzymes market?
2. What are the factors impacting the growth of the market?
3. What are the drivers, trends, and restraints in the market?
4. Who are the leading vendors and what are their market shares?
5. What is the impact of the COVID-19 pandemic on the industrial enzymes market?

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