

Global Hydrocolloids Market – Raw Materials, Products and Applications

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Abstracts

REPORT SYNOPSIS

Growth in the global hydrocolloids demand is mainly anticipated to be driven by increasing demand from food & beverages and oil & gas sectors. Food additives are becoming a necessary part of food and beverages industry and natural clean label food additives such as hydrocolloids penetration is on the rise. The hydrocolloids industry is forecast to receive an impetus from this booming demand. Increasing health consciousness and changing eating habits of consumers, especially in developing regions, are also the driving factors for hydrocolloids growth in the food and beverage sector. Increasing oil drilling activities in the United States and Canada, and continued usage of hydrocolloids in Middle Eastern oil producing nations is driving the demand for hydrocolloids such as guar gum, xanthan gum and carboxymethyl cellulose.

Food & Beverages form the largest application for Hydrocolloids on a global basis in terms of value, the market for which is estimated at US\$5.4 billion (43.7% share) in 2018 and is projected to reach US\$7.1 billion by 2024 to reflect the fastest 2018-2024 CAGR of 4.9%. In terms of volume, the global market for Hydrocolloids is estimated at 2.2 million metric tons in 2018.

Research Findings & Coverage

Global market for Hydrocolloids is analyzed in this report with respect to Raw Material Source, product types and end-use applications

The study exclusively analyzes the market size for hydrocolloid raw material source by product type and end-use application globally and in all major regions.

The report also analyzes the market for hydrocolloids by raw material source, product type and application in each major country across the globe

Demand for Hydrocolloids in Food & Beverages Being Driven by Clean Label and Non-GMO Trends

Hydrocolloids Offer Potential for Making Edible Coatings and Films

Growth in Low-pH Dairy Beverages to Drive Pectin Demand

Restrained Demand for Select Hydrocolloids Due to Tighter Raw Material Supply in the Offing

Key business trends focusing on product innovations/developments, M&As, JVs and other recent industry developments

Major companies profiled – 245

The industry guide includes the contact details for 500 companies

PRODUCT OUTLINE

The following Hydrocolloid raw material sources are analyzed in this report:

Animal-derived (Gelatin)

Microbial-fermented

Plant-derived

Seaweed-derived

Cellulose-based

The report analyzes the following key product types of Hydrocolloids:

Gelatin

Xanthan Gum

Gellan Gum

Guar Gum

Gum Arabic

LBG

Tara Gum

Pectin

Agar-Agar

Alginates

Carrageenan

CMC

MC & HPMC

MCC

The study explores the following major applications of Hydrocolloids:

Animal Feed

Food & Beverages

Cosmetics & Personal Care

Pharma & Healthcare

Oil & Gas

Industrial/Technical

Analysis Period, Units and Growth Rates

The report reviews, analyzes and projects the global market for Hydrocolloids for the period 2015-2024 in terms of volume in Metric Tons and value in US\$ and the compound annual growth rates (CAGRs) projected from 2018 through 2024

Geographic Coverage

North America (The United States, Canada and Mexico)

Europe (France, Germany, Italy, Poland, Russia, Spain, The United Kingdom and Rest of Europe)

Asia-Pacific (China, India, Indonesia, Japan, South Korea, Malaysia, Thailand and Rest of Asia-Pacific)

South America (Brazil, Argentina and Rest of South America)

Rest of World (South Africa, Turkey, and Other Rest of World for all hydrocolloids; Oman, Saudi Arabia and United Arab Emirates for select hydrocolloids)

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3. KEY GLOBAL PLAYERS

Accel Carrageenan Corporation (Philippines)
Algaia S.A. (France)
Alland& Robert (France)
Andi-Johnson Group (China)
Archer-Daniels-Midland Company (United States)
Asahi Kasei Corporation (Japan)
Ashland Global Holdings Inc. (United States)
Cargill, Inc. (United States)
CAROB S.A. (Spain)
Compania Espanola de Algas Marinas, S.A. (CEAMSA) (Spain)
CP Kelco U.S., Inc. (United States)
DSM Hydrocolloids (China)
DuPont Nutrition & Health (Denmark)
Fufeng Group Limited (China)
GelatinWeishardt S.A. (France)
GELITA AG (Germany)
GELNEX (Brazil)
Gelymar S.A. (Chile)
Hebei Xinhe Biochemical Co., Ltd (China)
Herbstreith& Fox KG (Germany)
Hindustan Gum & Chemicals Ltd. (India)
Hispanagar, S.A. (Spain)
Industrias Roko, S.A. (Spain)
Jai Bharat Gum & Chemicals Ltd (India)
Jellice Corporation (Japan)
Jungbunzlauer Suisse AG (Switzerland)
KIMICA Corporation (Japan)
Lamberti SpA (Italy)
Marcel Trading Corporation (Philippines)
MeiHua Holdings Group Co., Ltd (China)
MSC Co., Ltd. (South Korea)
Nexira SAS (France)
Nitta Gelatin Inc. (Japan)
Nouryon (Netherlands)
PB Leiner (Belgium)
QuimicaAmtex S.A. (Columbia)
Rousselot BV (Darling Ingredients) (Netherlands)
Shandong Head Co., Ltd. (China)
Shandong Jiejing Group Corporation (China)

Shanghai Brilliant Gum Co., Ltd. (BLG) (China)
Shin-Etsu Chemical Co., Ltd. (Japan)
Silvateam S.p.A. (Italy)
Solvay SA (Belgium)
Sterling Gelatin (India)
The Dow Chemical Company (United States)
TIC Gums, Inc. (United States)
Vikas WSP Limited (India)
W Hydrocolloids, Inc. (RICO Carrageenan) (Philippines)
Yantai Sheli Hydrocolloids Co., Ltd. (China)
Zhenpai Hydrocolloids Co., Ltd. (China)
Zibo Zhongxuan Biochemical Co., Ltd. (Deosen Biochemical Co., Ltd.) (China)

4. KEY BUSINESS AND PRODUCT TRENDS

Ingredion Adds Single Hydrocolloids to Reinforce its Portfolio
Cambrian Solutions, CEAMSA's Exclusive Distributor of Hydrocolloids in Canada
DSM to Purchase an Additional 46% Stake in Andre Pectin
Cornelius Selected as Distributor of Algaia's Alginate Portfolio in the UK and Ireland
CP Kelco's Carboxymethyl Cellulose Plant for Sale in China
Launch of New Brand Identities for DSM's Gellan Gum and Xanthan Gum
Algaia and Gelymar Form New Long-term Commercial and Development Pact
Solvay's Hydrocolloid Product Line Acquired by PMC Group International
CP Kelco's GENU Pectin Products Receive Non-GMO Project Verification
Accent Microcell Private Limited is EXCiPACT Certified
Expansion of Dow's Methyl Cellulose Capacity in Germany
Ashland Increases its Hydroxyethylcellulose Production Capacity
AIDP, Distributor Partner in North America for Gelymar's Carrageenan Products
CP Kelco to Expand Danish Pectin Plant's Production Capacity by 15%
Distribution Partners Selected by Cargill for Sustainable Growth of its Food Ingredients and Applications Business in North America
Ceamsa and Palmer Holland Inks Hydrocolloids Distribution Deal
CP Kelco Launches Label-Friendly GENU Explorer Pectin ND-200 for Neutral Desserts
NOP Organic Certification for Java Biocolloid's Seaweed Gracilaria Verrucosa Extracts
PB Leiner is the New Company Brand Name of PB Gelatins/PB Leiner
Joint Venture Formed by Alland & Robert and Sayaji for Spray Dried Acacia Gum Production
Nouryon is the New Name for AkzoNobel Specialty Chemicals
Frutarom Acquired by IFF

CP Kelco's 30 CEKOL Cellulose Gum products Verified by Non-GMO Project
Naturex SA is Acquired by Swiss based Givaudan Group
ISC Gums chose HORN as Specialty Distributor of Gum Acacia in the Western US
Jellice Pioneer Expands the Most Modern Gelatin Factory in Europe
DuPont Danisco Lactogel FC 5200 Recognized by Fi South America Innovation Awards
New Non-GMO Project Verified Hydrocolloids added to TIC Gums' Ingredients
Range of Carrageenans and Blends for Cosmetic Applications Introduced by Algaia
ADM Opens New Technical Innovation Centre, Regional Office in Shanghai
Herbstreith& Fox Develops LM Pectins for Organic Applications
Silvateam Selects Brenntag as its Pectin Distribution Partner in North America
Cargill Plans to Construct \$150 million HM Pectin Plant in Brazil
DSM Hydrocolloids Opens DSM Zhongken Biotechnology to Broaden Biogum
Innovation Capability
AkzoNobel and Renmatix Partner to Create a New Form of Crystalline Cellulose
Cargill Partners with BioHope and Sanrise China for the Cosmetics Ingredients
Distribution in China
Cargill Expands its Seabrid Portfolio of Carrageenans for Creamy Dairy Desserts
TIC Gums to Introduce Simplistica line of ingredient systems at IFT 2018
Mitsubishi Corporation Consolidates its Life Sciences Business
Rousselot to Display Clean Label Gelatin Solutions at IFT 2018 in Chicago
TICOrganic Tara Gum HV added to hydrocolloids portfolio of TIC Gums
Majority of Jungbunzlauer Products Obtains Non-GMO Project Verification
Marcel Trading Corporation Acquired CP Kelco's Philippines Carrageenan Plant
DuPont Nutrition & Health Divests Alginates Business to JRS Group
Quick Shell37 Allows for a Fast Use of Sugar Layers in Making Pan Coated Products
Rousselot Launches X-Pure Medical Grade Gelatin Range for In-Body Usage
Majority of Jungbunzlauer Products Received Non-GMO Project Verification
Algaia and Arles Agroalimentaire Inks Distribution Pact for Alginates in France
CP Kelco's Xanthan Gum Products Receives Non-GMO Project Verification
CP Kelco to Enter Indonesian Distribution Partnership with Azelis
TIC Gums Offers US-Produced GuarNT USA for Pet Food and Treat Applications
Non-GMO Project Verification for CP Kelco's Four New KELCOGEL Gellan Gum
Products
PT. Azelis Indonesia Distribusi Selected as CP Kelco's Exclusive Distributor in
Indonesia
Ukraine based T.B.Fruit Constructs Pectin Production Line
DRG Gelatin, Nitta Gelatin's New Pharmaceutical Gelatin
DuPont Nutrition & Health Launches Pectin for Reduced Sugar Fruit Spreads
Unipex to Distribute Algaia's Hydrocolloids for Personal Care Markets

Algaia Introduces Satialgine DVA Alginate for Low-Fat Desserts
Java Biocolloid Establishes an Operative Branch in Trieste
United States to Import Gum Arabic Directly from Sudan
DSM and Haixing to Acquire Inner Mongolia Rainbow Biotechnology
DowDuPont Completes FMC Corporation's Health & Nutrition Business Acquisition
Shin-Etsu Chemical Invests to Strengthen its Cellulose Derivatives Business
Gelnex to Build New Gelatin Production Unit in Brazil
AkzoNobel Increases EHEC Cellulosic Ethers Production
SE Tylose Starts New Technical Centre at the Science Park II in Singapore
Launch of TIC Gums' New Hydrocolloid Solutions at SupplySide West 2017
Successful Completion of the Merger between Dow and DuPont
Gelymar Moves its Headquarters to Santiago
Launch of Syndeo Range of Hydrocolloids
Algia Expands in North America with a Distribution Pact with AIDP Inc.
Cargill Introduced New Seabrid Carrageenans for Gelled Dairy Desserts
First Acquisition of Roquette in the Pharmaceutical Excipients Market
GELITA's \$22-Million Project Received Official Go-Ahead from Woodbury County Board of Supervisors
CP Kelco's KELCOGEL Gellan Gum Production Capacity Increased to Meet the Growing Market Demand
Ingredion Acquires TIC Gums
Cargill's Alginates Business is Acquired by Algaia
GELITA to Construct Ultra-Modern Facilities in Eberbach
Inauguration of Ashland's New Pharmaceutical Excipient Manufacturing Unit in China
Introduction of DuPont's New Range of GRINDSTED JU Systems for the South Asia Market
W Hydrocolloids Acquired Kerry Group's Seaweed Processing Facility in Philippines
Launch of Ticaloid UltrasMOOTH NGMO Original by TIC Gums
Nexira Becomes an Independent Company
Vegan Xanthan Gum Grades Introduced by Jungbunzlauer
Eviagenics is now Algaia
Samsung Group's Chemical Businesses Acquired by Lotte Chemical Group
Addition of Gellan Gum to TIC Gums' Portfolio of Hydrocolloids
Magnus Union Plans to Built Pectin Production Plant in Belgorod, Russia
CP Kelco to Increase Pectin Production Capacity in Europe
Asahi Kasei and SPI Pharma Form Pharmaceutical Additives Reciprocal Sales Pact
CP Kelco Aims to Construct a New Production Plant in North America for Gellan Gum and Specialty Xanthan Gum
Nexira's Fibregum Acacia Fiber and Instantgum Acacia Gum Ingredients Verified by the

Non-GMO Project

Cargill Acquires FMC's Pectin Operations

CP Kelco to Expand Distribution Partnership with L.V. Lomas into the United States

CP Kelco Expands Specialty Biogums Production Capacity

Certified Organic Tara Gum Products Offered by Exandal

TIC Gums Launches Pretested Apple Pectin

CP Kelco Plans to Build New Citrus Peel Plant in Latin America

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 - Agarmex, S.A. De C.V. (Mexico)
 - Archer-Daniels-Midland Company (United States)
 - Ashland Global Holdings Inc. (United States)
 - Cargill, Inc. (United States)
 - CP Kelco U.S., Inc. (United States)
 - Darling Ingredients, Inc. (United States)
 - DuPont Nutrition and Health (Mexico)
 - Exandal Corp. (United States)
 - GELITA USA Inc. (United States)
 - Guar Resources, LLC. (United States)
 - Ingredients Solutions, Inc. (United States)
 - ISC Gums (Importers Service Corp) (United States)
 - J.F. Hydrocolloids, Inc. (United States)

Kenney & Ross Limited (Canada)
Nitta Gelatin NA Inc. (United States)
Pacific Pectin, Inc. (United States)
PB Leiner USA (United States)
QuimicaAmtex, S.A. De C.V. (Mexico)
Rayonier Advanced Materials, Inc. (United States)
SE Tylose USA, Inc.
The Dow Chemical Company (United States)
TIC Gums, Inc. (United States)
Vanderbilt Minerals, LLC (United States)
Wego Chemical Group (United States)
Weishardt International NA (Canada)

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 - Algaia S.A. (France)

Alland& Robert (France)
Arthur Branwell& Co Ltd (United Kingdom)
B&V srl (Italy)
Cargill Europe
CAROB S.A. (Spain)
Compania Espanola de Algas Marinas, S.A. (CEAMSA) (Spain)
COPALIS (France)
CP Kelco Europe
DFE Pharma GmbH & Co.KG (Germany)
Dow Deutschland AnlagengesellschaftmbH (Germany)
DuPont Nutrition & Health (Denmark)
Ewald-Gelatine GmbH (Germany)
GelatinesWeishardt S.A. (France)
GELITA AG (Germany)
Herbstreith& Fox KG (Germany)
Hispanagar, S.A. (Spain)
Iberagar S.A. (Portugal)
Industrias Roko, S.A. (Spain)
Italgelatine S.p.A. (Italy)
J. Rettenmaier&Sohne GmbH & Co KG (Germany)
Jellice Pioneer Europe B.V. (Netherlands)
JuncaGelatines, S.L. (Spain)
Jungbunzlauer Suisse AG (Switzerland)
Kerry Group (Ireland)
Lamberti SpA (Italy)
LapiGelatine S.p.A (Italy)
LBG Sicilia srl (Italy)
Mare S.p.A (Italy)
Mikro-Technik GmbH & Co. KG (Germany)
Naturex SA (France)
Nexira SAS (France)
Norevo GmbH (Germany)
Nouryon (Netherlands)
PB Leiner (Belgium)
Pectcof B.V. (Netherlands)
Phrikolat Drilling Specialties GmbH (Germany)
Polygal AG (Switzerland)
REINERT GRUPPE Ingredients GmbH (Germany)
Roquette Freres (France)

Rousselot BV (Darling Ingredients) (Netherlands)
SE Tylose GmbH & Co. KG (Germany)
SEPPIC S.A. (France)
Silvateam S.p.a. (Italy)
Sobigel S.A. (France)
Solvay SA (Belgium)
Tate & Lyle PLC (United Kingdom)
Trobas Gelatine B.V. (Netherlands)
UNIPKIN Ingredients AG (Switzerland)

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Abdullahbhai Abdul Kader Group (India)

Accel Carrageenan Corporation (formerly RICO Philippines) (Philippines)

Accent Microcell Pvt. Ltd. (India)

Agro Gums (India)

Altrafine Gums (India)

Amar Cellulose Industries (India)
Andi-Johnson Group (China)
Anqiu Eagle Cellulose Co., Ltd (China)
Asahi Gelatine Industrial Co., Ltd. (Japan)
Asahi Kasei Corporation (Japan)
Baotou Dongbao Bio-Tech Co., Ltd. (China)
CEAMSA Asia Inc. (Philippines)
Cellulose Solutions Private Limited (India)
Changshu Wealthy Science and Technology Co., Ltd. (China)
CP Kelco (Shandong) Biological Co., Ltd.
Daicel FineChem Ltd. (Japan)
Daiichi-Kasei Co., Ltd. (Japan)
Dancheng CAIXIN Sugar Industry Co., Ltd. (China)
Devson Impex Private Limited (India)
DFE Pharma India LLP (India)
Dipti Cellulose Pvt. Ltd. (India)
DKS Co. Ltd. (Japan)
Drytech Processes (I) Pvt. Ltd. (India)
DSM Hydrocolloids (China)
Yantai Andre Pectin Co., Ltd. (China)
DSM Zhongken Biotechnology Co., Ltd. (China)
DSM Rainbow (Inner Mongolia) Biotechnology Co., Ltd. (China)
Fufeng Group Limited (China)
Fujian Global Ocean Biotechnology Co., Ltd. (China)
GELITA Australia Pty. Ltd. (Australia)
GELITA China (China)
Geltech Co., Ltd. (South Korea)
Godavari Biorefineries Ltd. (India)
GuangraoLiuhe Chemical Co., Ltd. (China)
Haji DossaNutralgum (Pvt) Ltd. (Pakistan)
Hangzhou Gellan Solutions Biotec Co., Ltd. (China)
Hebei Xinhe Biochemical Co., Ltd (China)
Hindustan Gum & Chemicals Ltd. (India)
Ina Food Industry Co., Ltd. (Japan)
India Gelatine& Chemicals Ltd (India)
India Glycols Limited (India)
Indian Hydrocolloids (IHC) (India)
Inter Chemical (Shijiazhuang) Co., Ltd. (China)
IRO Alginate Industry Co., Ltd. (China)

Jai Bharat Gum & Chemicals Ltd (India)
Java Biocolloid (Indonesia)
Jellice Corporation (Japan)
JianLong Biotechnology Co., LTD. (China)
Kantilal Brothers (India)
Kapadia Gum Industries Pvt. Ltd. (India)
Karagen Indonesia, CV (Indonesia)
KIMICA Corporation (Japan)
Koei Chemical Co., Ltd. (Japan)
Krishna Pectins Pvt. Ltd. (India)
Lamberti Hydrocolloids Private Ltd (India)
Lianyungang Zhongda Seaweed Industrial Co., Ltd. (China)
Lotus Gums & Chemicals (India)
Lucid Colloids Ltd. (India)
Madhu Hydrocolloids Pvt. Ltd. (India)
Marcel Trading Corporation (Philippines)
Marine Science Co., Ltd. (Japan)
MC Food Specialties Inc. (Japan)
MCPI Corporation (Philippines)
MeiHua Holdings Group Co., Ltd (China)
Meron Group (India)
Mingtai Chemical Co., Ltd. (Taiwan)
MSC Co., Ltd. (South Korea)
Nanjing Laienda Biotechnology Co., Ltd. (Lautu) (China)
Narmada Gelatines Ltd. (India)
NB Entrepreneurs (India)
Neelkanth Polymers (India)
New Zealand Seaweeds Limited (New Zealand)
Nippi, Inc. (Japan)
Nippon Paper Industries Co., Ltd. (Japan)
Nitta Gelatin Inc. (Japan)
Nitta Gelatin India Ltd. (India)
OPAL Biotech Ltd. (China)
Patel Industries (India)
PB Gelatins Heilongjiang Co., Ltd. (China)
Philippine Bio Industries, Inc. (Philippines)
Prasmo Agri (India)
Premcem Gums Pvt. Ltd (India)
PT. Agar Swallow (Indonesia)

PT. AgarindoBogatama (Indonesia)
PT. Algalindo Perdana (Indonesia)
PT. Amarta Carrageenan Indonesia (Indonesia)
PT. ArbeChemindo (Indonesia)
PT. CahayaCemerlang (Indonesia)
PT. Dunia Bintang Walet (Indonesia)
PT. GalicArtabahari (Indonesia)
PT. Gumindo Perkasa Industri (Indogum) (Indonesia)
PT. Hydrocolloid Indonesia (Indonesia)
PT. Indo Seaweed (Indonesia)
PT. Indoking Aneka Agar-Agar Industri (Indonesia)
PT. Kappa Carrageenan Nusantara (Indonesia)
PT. Surya Indoalgas (Indonesia)
PT. Wahyu Putra Bimasakti (Indonesia)
Puning Huey Shyang Seaweed Industrial Co., Ltd. (China)
Qingdao Bright Moon Seaweed Group Co., Ltd. (China)
Qingdao Fengrun Seaweed Co., Ltd. (China)
Qingdao Gather Great Ocean Algae Industry Group (China)
Qingdao Great Chemical Inc. (China)
Qingdao Hyzlin Biology Development Co., Ltd. (China)
Qingdao Unichem International Trade Co., Ltd. (China)
Qingdao Zoranoc Oilfield Chemical Co., Ltd. (China)
Quzhou Pectin Co., Ltd. (China)
Rama Gum Industries (India) Ltd (India)
Sammi Industry Co., Ltd. (South Korea)
Shandong Head Co., Ltd. (China)
Shandong Jiejing Group Corporation (China)
Shanghai Brilliant Gum Co., Ltd. (BLG) (China)
Shanghai ShenGuang Edible Chemicals Co., Ltd. (China)
Shemberg Corporation (Philippines)
Shin-Etsu Chemical Co., Ltd. (Japan)
Shree Ram Gum and Chemicals (India)
Shubhlaxmi Industries (India)
Sichuan Longrun-Newstar Group Co., Ltd. (China)
Sidley Chemical Co., Ltd. (China)
Sigachi Industries Pvt. Ltd. (India)
SNAP Natural & Alginate Products Pvt. Ltd. (India)
SOMAR Corporation (Japan)
Sterling Gelatin (India)

Sunita Hydrocolloids Private Limited (India)
Supreme Gums Pvt. Ltd. (India)
TacaraSdnBhd (Malaysia)
TBK Manufacturing Corporation (Philippines)
Urakami Kasei Limited (Japan)
Vasundhara Industries (India)
Vikas WSP Limited (India)
W Hydrocolloids, Inc. (RICO Carrageenan) (Philippines)
Xiamen Gelken Gelatin Co., Ltd. (China)
Xuzhou Liyuan Cellulose Technology Co. Ltd. (China)
Yantai Sheli Hydrocolloids Co., Ltd. (China)
Yantai Xinwang Seaweed Co., Ltd. (China)
Yasu Chemical Inc. (Japan)
Yixing Tongda Chemical Co., Ltd. (China)
Zhejiang Chuangfeng Chemical Co., Ltd. (China)
Zhenpai Hydrocolloids Co., Ltd. (China)
Zibo Zhongxuan Biochemical Co., Ltd. (Deosen Biochemical Co., Ltd.) (China)

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Agar Brasileiro Industria e Comercio Ltda. (AgarGel) (Brazil)

Agar Del Pacifico S.A. (Agarpac) (Chile)

Alginatos Chile S.A. (Chile)

Argos Export S.A. (Peru)

CP KelcoBrasil (Brazil)

Denver Especialidades Quimicas Ltda. (Brazil)

Gelco Gelatinas Do Brasil Ltda. (Brazil)

GELITA Do Brasil Ltda. (Brazil)

GELNEX (Brazil)

Gelymar S.A. (Chile)

Gomas y Taninos S.A.C. (Peru)

PB Leiner Argentina S.A (Argentina)

PB LeinerBrasilLtda (Brazil)

Prodoctora DE Agar S.A. (Proagar S.A.) (Chile)

Quimica Amtex S.A. (Columbia)

Roquette Brazil (Brazil)

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10.4.3 Carboxymethyl Cellulose (CMC)

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Aciselsan, AcipayamSeluloz Sanayi veTicaret (Turkey)

Carst and Walker (Pty) Ltd (South Africa)

Denkim, DenizliKimya Sanayi veTicaret A.S. (Turkey)

GELITA South Africa Pty. Ltd (South Africa)

GKM Food and Food Additives Company (Turkey)

Halavet Gida Sanayi veTicaret A.S. (Turkey)

Incom AS (Turkey)

JSC Mogelit (Belarus)

Lisichansk Gelatin Plant ALC (Ukraine)

PatisanKimya Sanayi A.S. (Turkey)

SELKIM SelulozKimya A.S. (Turkey)

Selt Marine Group (Tunisia)

Setexam S.A. (Morocco)

USK Kimya A.S. (Turkey)

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