

GLOBAL FERMENTATION CHEMICALS MARKET FORECAST 2017-2025

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Abstracts

KEY FINDINGS

The Global fermentation chemicals market by tools generated revenue of \$47.40 Billion in 2016 and is anticipated to contribute \$105.86 Billion by 2025, growing at a CAGR of 9.89%. Various reasons for growth of the fermentation chemicals market are growing demand for alcohol, increasing usage of fermentation process in various industries, applications in industrial biotechnology, higher consumer awareness about bio-based products and rising environmental concerns.

Fermentation chemicals are used in the fermentation process and help in speeding up the process. Fermentation chemicals play the role of an initiator and are used as catalysts or processor to hasten the process. This result in cost saving and less time is needed to complete the fermentation process.

Fermentation chemicals are the most important raw material in the alcohol industry. These chemicals are also used in nutritional food, animal feed and food preservation. They are also used in bio-plastics and fibers production. Strict environmental regulation from the EPA, European Union etc. will lead to higher demand for green bio-based products and these production methods will utilize fermentation chemicals.

Fermentation chemicals market is segmented on the basis of geography, application, and products. On the basis of products, fermentation chemicals are classified as alcohols, enzymes, organic acid and others. On the basis of application, they are classified as industrial application, food and beverage, plastic and fibers, nutrition and pharmaceuticals and others.

MARKET INSIGHTS

Market drivers for fermentation chemicals are increasing demand in various industries, growing market for alcohol industry, strict environmental regulations, higher demand for bio-based products, applications in industrial biotechnology and ease of use.

Alcohols dominate the fermentation chemicals by type. It constitutes 55% market share and as fermentation is an essential part of alcohol production, demand for these in the alcoholic beverage industry is expected to grow at a good CAGR in the forecast period.

Enzymes form the second largest share followed by organic acids. Organic acids are expected to report highest growth in the forecast period. Reason for increasing demand of organic acids in the forecast period will be their increasing use in oil and gas well treatments. They are also used in food preservation, animal feed and nutritional food. It is predicted that the market for preserved and nutritional food will grow in the future leading to higher demand for organic acids.

Industrial application has the highest market share for fermentation chemicals, which is at 17%. They are used for various industrial processes like plastic, chemical, rubber, biofuel, leather and textile. Detergent industry is the biggest user of enzymes as they have better ability to remove stains and are environment friendly. Fibers and plastics industry is expected to report the highest growth for fermentation chemicals in the forecast period.

There is an increase in demand for bio-plastic from various industries due to environment consciousness. Growth in industrial production along with higher industrial growth in developing economies will lead to increasing demand. More antibiotics and steroids are being produced due to enhanced demand and higher expenditure in developing countries. This too will lead to higher demand for fermentation chemicals. Fermentation chemicals are used as key raw material in pet food production and growth in demand for animal feed additives market will lead to market growth.

Factors that will restrain market growth are intermittent supply of raw material like microorganisms and nutrients, high production cost and complexity in manufacturing process.

Figure: Global Fermentation chemicals Market By Geography (%) in 2016

REGIONAL INSIGHTS

Market regions that are covered in the report are North America, Europe, Asia-Pacific and RoW. North America has the largest market share of fermentation chemicals market followed by Europe. Factors, which favor growth of fermentation chemicals market in North America, are high demand for alcohol and organic acids for food and beverage and industrial applications. Strict EPA regulation will also help the market to grow. Europe will not report very high growth in the forecast period due to strict regulation in food and beverage industry.

Asia-Pacific market is expected to report good growth in the forecast period due to increasing population, growing demand for bakery and ready to eat products, increase in alcohol consumption and changing food consumption trends. This market is expected to report highest growth due to increasing industrialization and government initiatives to support various industries.

COMPETITIVE INSIGHTS

The major market players for fermentation chemicals are BASF SE, Amano Enzyme Inc, The Dow Chemical Company, Cargill Inc, Archer Daniels Midland, DuPont Danisco A/S, Ajinomoto Company Incorporation, Evonik Industries, Fuso Chemicals and Novozymes A/S. Established companies have a good hold on the fermentation chemicals market due to high cost of investment needed to enter and sustain in the market. Companies are forming alliances and are going for mergers and acquisitions to strengthen their market position. Organizations are investing in research and development to come up with novel and innovative products that will capture new market share. Product development is an important strategy which almost all companies will adopt.

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