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Gluten-free Products Market by Type (Bakery Products, Snacks & RTE Products, Pizzas & Pastas, Condiments & Dressings), Form, Distribution Channel (Conventional Stores, Specialty Stores, and Drugstores & Pharmacies), Source - Global Forecast to 2029

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Abstracts

The global gluten-free products market size is estimated to be valued at USD 7.70 billion in 2024 and is projected to reach USD 11.48 billion by 2029 at a CAGR of 8.3%.

The increasing prevalence of IBS encourages demand for gluten-free products to a great degree, as patients with IBS consider dietary changes in order to cope with their condition. IBS affects 10-15% of the global population and manifests through symptoms such as abdominal pain, bloating, diarrhea, and constipation. Study published by the National Library of Medicine in April 2020 indicates that IBS is often overlapped with celiac disease and non-celiac gluten/wheat sensitivity. It underlines that though the systematic screening for CD in IBS patients is not advised, GFD may have a positive impact on symptoms of IBS, especially diarrhea-predominant IBS. This has driven the fascination among IBS patients in gluten-free products, further accelerating market growth.

According to the Centers for Disease Control and Prevention’s (CDC) June 2024 report, inflammatory bowel disease cases are on the rise in the United States, affecting an estimated 2.4 to 3.1 million people. The growth in IBD, including Crohn's disease and ulcerative colitis, continues to add to demand for gluten-free foods because at least some of these people also try a gluten-free diet from time to time as part of the various options available for managing symptoms. Growing awareness of gluten-free diets as

part of treatment for various gastrointestinal disorders has underlined the need for gluten-free product availability, thereby presenting one of the key drivers in the dynamic food market.

“Disruptions in Gluten-free products Market.”

The gluten-free products market is experiencing disruptions due to rising consumer demand and advancements in ingredient technology. One significant innovation is microencapsulation technology, which enhances the shelf life, texture, and flavor of gluten-free products by protecting sensitive ingredients like probiotics, vitamins, and enzymes from degradation. This technology also improves the nutritional profile of gluten-free foods by enabling the inclusion of beneficial compounds that might otherwise be lost during processing. As consumers increasingly seek high-quality, gluten-free options, these technological advancements are reshaping the market, allowing for more diverse and appealing product offerings.

“Liquid form is expected to have significant CAGR in the form segment throughout the forecast period.”

The liquid form, also addressed as gluten-free products, will witness the highest CAGR in the by-form segment of the market. This is because it offers flexibility and ease, majorly for sauces, dips, and dressings. Companies like The Kraft Heinz Company (US) and Barilla G. e R. F.lli S.p.A. (Italy) offer a variety of gluten-free sauces, mayonnaise, and cheese dips. In April 2024, the company The Kraft Heinz Company (US) launched Velveeta Cheese Dip, for gluten-free demand in the cheese segment. In addition, even a startup like Soom Foods (US) extends gluten-free product offering in the US Tahini market. The more convenient and frequent use of such liquid products in daily meals is fueling their consumption and popularity in the gluten-free segment.

“Grocery stores in conventional stores subsegment by distribution channels segment is the dominant in the gluten-free products market.”

Grocery stores command the highest market share in the conventional store distribution channel for gluten-free products due to their wide reach and convenience. These stores offer a diverse range of gluten-free options, catering to the growing consumer demand for accessible and varied choices. The extensive shelf space and frequent stock updates in grocery stores allow for a broad selection of gluten-free products, from everyday essentials to specialty items. For instance, major grocery chains like Whole Foods and Walmart have dedicated sections for gluten-free products, enhancing visibility and accessibility. This strategic positioning not only attracts health-conscious shoppers but also supports steady sales growth in the gluten-free segment.

“The US accounts for largest market share in the North America region in the gluten-free products market.”

The US accounted for the highest share in the gluten-free products market of North America due to high consumer awareness and industry support. Some of the countries that evidence greater growth in the range of gluten-free products is the US, where there has been an increase in health consciousness, gluten sensitivity, and celiac disease. The companies, for example, The Kraft Heinz Company and Conagra have been investing hugely to have an increase in their product offerings within the gluten-free product categories. This includes the recent introduction of gluten-free sandwich cookies by Kraft Heinz and Glutino pretzels by Conagra. These innovations target different market segments in the form of varied tastes and lifestyle needs. Besides, vast retail shelf-space networks and proper marketing measures have also lent support to helping the U.S. to dominate in the global gluten-free market.

The break-up of the profile of primary participants in the gluten-free products market:

By Company Type: Tier 1 – 40%, Tier 2 – 32%, and Tier 3 – 28%

By Designation: C Level – 45%, Director Level – 33%, Others - 22%

By Region: North America – 15%, Europe – 20%, Asia Pacific – 40%, South America – 12% and Rest of the World – 13%

Prominent companies include The Kraft Heinz Company (US), The Hain Celestial Group (US), General Mills Inc. (US), Conagra Brands, Inc. (US), Kellanova (US), Barilla G. e R. F.lli S.p.A. (Italy), Raisio Oyj (Finland), Dr. Sch?r AG / SPA (Italy), Ecotone (France), Enjoy Life (US), Alara Wholefoods Ltd (England), Katz Gluten Free (US), Genius Food (UK), Silly Yaks - For Real Taste (Australia), and Norside Foods Ltd. (UK) among others.

Research Coverage:

This research report categorizes the Gluten-free products Market by Type (Bakery Products, Snacks & RTE Products, Pizzas & Pastas, Condiments & Dressings, and

Other Types), Form (Solid, and Liquid), Distribution Channels (Conventional Stores, Specialty Stores, and Drugstores & Pharmacies), Source (Animal Source and Plant Source), and Region (North America, Europe, Asia Pacific, South America, and Rest of the World).

The report covers information about the key factors, such as drivers, restraints, opportunities, and challenges impacting the growth of the gluten-free products market. It also provides a detailed analysis of the major players in the market, including their business overview, products offered; key strategies; partnerships, new product launches, expansions, and acquisitions. Competitive benchmarking of upcoming startups in the gluten-free products market is covered in this report.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall gluten-free products market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Increased diagnosis of celiac disease and other food allergies, Health benefits and adoption of special dietary lifestyles and free-from foods, Increasing prevalence of irritable bowel syndrome (IBS) and Increasing availability of gluten-free products in organized retail stores leading to increased sales), restraints (High cost of gluten-free products than conventional gluten-containing products, and Gluten-free products lack an adequate amount of dietary fibers, resulting in constipation and other ailments of the digestive system), opportunities (Adoption of microencapsulation technology to improve the shelf-life of gluten-free products, Favorable regulatory framework and initiatives taken by governments and institutions to promote a gluten-free diet, and Product innovations to make gluten-free products more convenient and affordable), and challenges (Formulation challenges faced by manufacturers) influencing the growth of the gluten-free products market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the gluten-free products market.

Market Development: Comprehensive information about lucrative markets – the report analyses the gluten-free products market across varied regions.

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the gluten-free products market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading gluten-free products market players such as The Kraft Heinz Company (US), The Hain Celestial Group (US), General Mills Inc. (US), Conagra Brands, Inc. (US), Kellanova (US), Barilla G. e R. F.lli S.p.A. (Italy), Raisio Oyj (Finland), Dr. Sch?r AG / SPA (Italy), Ecotone (France), Enjoy Life (US), Alara Wholefoods Ltd (England), Katz Gluten Free (US), Genius Food (UK), Silly Yaks - For Real Taste (Australia), and Norside Foods Ltd. (UK) among others in the gluten-free products market strategies. The report also helps stakeholders understand the gluten-free products market and provides them with information on key market drivers, restraints, challenges, and opportunities.

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Contents

INTRODUCTION

1. STUDY OBJECTIVES

1.2 MARKET DEFINITION
1.3 STUDY SCOPE
1.3. MARKET SEGMENTATION
1.4 YEARS CONSIDERED
1.5 CURRENCY CONSIDERED
1.6 UNIT CONSIDERED
1.7 STAKEHOLDERS
1.8 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

2. RESEARCH DATA

2.1. SECONDARY DATA
  2.1.1. Key data from secondary sources
  2.1.2 PRIMARY DATA
  2.1.2. Key data from primary sources
    2.1.2.2 Breakdown of primary interviews
    2.1.2.3 Key industry insights
2.2 FACTOR ANALYSIS
2.2. INTRODUCTION
  2.2.2 DEMAND-SIDE ANALYSIS
  2.2.3 SUPPLY-SIDE ANALYSIS
2.3 MARKET SIZE ESTIMATION
2.3. APPROACH ONE (BASED ON PRODUCT TYPE, BY REGION)
  2.3.2 APPROACH TWO (BASED ON GLOBAL MARKET)
2.4 DATA TRIANGULATION
2.5 RESEARCH ASSUMPTIONS
2.6 LIMITATIONS AND RISK ASSESSMENT

3 EXECUTIVE SUMMARY

4 PREMIUM INSIGHTS

4. ATTRACTIVE OPPORTUNITIES IN GLUTEN-FREE PRODUCTS MARKET

4.2 GLUTEN-FREE PRODUCTS MARKET: SHARE OF MAJOR REGIONAL SUBMARKETS
4.3 NORTH AMERICA: GLUTEN-FREE PRODUCTS MARKET, BY TYPE AND COUNTRY
4.4 GLUTEN-FREE PRODUCTS MARKET, BY REGION
4.5 GLUTEN-FREE PRODUCTS MARKET, BY TYPE
4.6 GLUTEN-FREE PRODUCTS MARKET, BY DISTRIBUTION CHANNEL

5 MARKET OVERVIEW

5. INTRODUCTION

5.2 MACROECONOMIC OUTLOOK
5.2. INCREASE IN PER DAY MEDIAN INCOME OR CONSUMPTION
  5.2.2 INCREASE IN EXPENDITURE ON BAKERY PRODUCTS
5.3 MARKET DYNAMICS
5.3. DRIVERS
  5.3.1. Increased diagnosis of celiac disease and other food allergies
    5.3.1.2 Growing awareness of benefits of including nutritive and free-from foods in daily diets
    5.3.1.3 Increasing prevalence of irritable bowel syndrome
    5.3.1.4 Increasing availability of gluten-free products in organized retail stores
  5.3.2 RESTRAINTS
  5.3.2. Premium pricing of gluten-free products than conventional gluten-containing products
    5.3.2.2 Fiber deficiency in gluten-free products
  5.3.3 OPPORTUNITIES
  5.3.3. Adoption of microencapsulation technology to improve shelf-life of gluten-free products
    5.3.3.2 Favorable regulatory framework and initiatives to promote gluten-free foods
    5.3.3.3 Product innovations to make gluten-free products more convenient and affordable
  5.3.4 CHALLENGES
  5.3.4. Formulation challenges faced by manufacturers

5.4 IMPACT OF AI/GEN AI ON GLUTEN-FREE PRODUCTS MARKET
5.4. INTRODUCTION
5.4.2 USE OF GEN AI IN GLUTEN-FREE PRODUCTS
5.4.3 IMPACT OF AI ON GLUTEN-FREE PRODUCTS MARKET
5.4.4 IMPACT OF GEN AI ON ADJACENT ECOSYSTEM

6 INDUSTRY TRENDS

6. INTRODUCTION

6.2 SUPPLY CHAIN ANALYSIS
6.3 VALUE CHAIN ANALYSIS
6.3. RESEARCH AND DEVELOPMENT
6.3.2 RAW MATERIAL SOURCING
6.3.3 MANUFACTURING/PRODUCTION
6.3.4 QUALITY CONTROL & SAFETY
6.3.5 LOGISTICS & DISTRIBUTION
6.3.6 MARKETING AND SALES
6.3.7 END USER
6.4 TRADE ANALYSIS
6.4. EXPORT SCENARIO
6.4.1. Export scenario of breads, pastries, cakes, biscuits, and other bakers' wares related to gluten-free products
6.4.2 IMPORT SCENARIO
6.4.2. Import scenario of breads, pastries, cakes, biscuits, and other bakers' wares related to gluten-free products
6.5 TECHNOLOGY ANALYSIS
6.5. KEY TECHNOLOGIES
6.5.1. Hydrocolloids and gums
6.5.1.2 Microencapsulation technology
6.5.1.3 Enzyme technology
6.5.1.4 Extrusion technology
6.5.2 COMPLEMENTARY TECHNOLOGIES
6.5.2. Blockchain for traceability
6.5.3 ADJACENT TECHNOLOGIES
6.5.3. Sustainable packaging solutions
6.6 PRICING ANALYSIS
6.6. AVERAGE SELLING PRICE TREND, BY TYPE
6.6.2 AVERAGE SELLING PRICE TREND, BY REGION

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6.7 ECOSYSTEM ANALYSIS
6.7. SUPPLY SIDE
  6.7.2 DEMAND SIDE
6.8 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES
6.9 PATENT ANALYSIS
6.9. LIST OF MAJOR PATENTS
6.10 KEY CONFERENCES AND EVENTS
6.1 TARIFF AND REGULATORY LANDSCAPE
6.11. TARIFF RELATED TO GLUTEN-FREE PRODUCTS
  6.11.2 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
6.12 REGULATORY FRAMEWORK
6.12. INTRODUCTION
  6.12.2 NORTH AMERICA
  6.12.2. US
    6.12.2.2 Canada
    6.12.2.3 Mexico
  6.12.3 EUROPE
  6.12.4 ASIA PACIFIC
  6.12.4. China
    6.12.4.2 Japan
    6.12.4.3 India
    6.12.4.4 Australia
  6.12.5 SOUTH AMERICA
  6.12.5. Brazil
6.13 PORTER'S FIVE FORCES ANALYSIS
6.13. INTENSITY OF COMPETITIVE RIVALRY
  6.13.2 BARGAINING POWER OF SUPPLIERS
  6.13.3 BARGAINING POWER OF BUYERS
  6.13.4 THREAT OF SUBSTITUTES
  6.13.5 THREAT OF NEW ENTRANTS
6.14 KEY STAKEHOLDERS AND BUYING CRITERIA
6.14. KEY STAKEHOLDERS IN BUYING PROCESS
  6.14.2 INFLUENCE OF KEY STAKEHOLDERS ON BUYING PROCESS
  6.14.3 BUYING CRITERIA
6.15 CASE STUDY ANALYSIS
6.15. THE KRAFT HEINZ COMPANY: REVOLUTIONIZING GLUTEN-FREE PRODUCTS IN CANADA
  6.15.2 CONAGRA BRANDS, INC. EXPANDS GLUTEN-FREE AND READY-TO-EAT

PRODUCT LINEUP AT EXPO WEST 2024
6.16 INVESTMENT AND FUNDING SCENARIO

7 GLUTEN-FREE PRODUCTS MARKET, BY DISTRIBUTION CHANNEL

7. INTRODUCTION

7.2 CONVENTIONAL STORES
7.2. EASE OF ACCESSIBILITY AND RELATIVE ECONOMIC EFFICIENCY TO DRIVE MARKET
  7.2.1. Grocery stores
    7.2.1.2 Mass merchandisers
    7.2.1.3 Warehouse clubs
    7.2.1.4 Online retailers
7.3 SPECIALTY STORES
7.3. FOCUS ON NICHE, HIGH-QUALITY OFFERINGS TAILORED TO SPECIFIC DIETARY NEEDS TO BOOST DEMAND FOR SPECIALTY STORES
  7.3.1. Bakery stores
    7.3.1.2 Confectionery stores
    7.3.1.3 Gourmet stores
7.4 DRUGSTORES & PHARMACIES
7.4. EXTENSIVE SPECIFIED SELECTION OF FOODS TO DRIVE MARKET

8 GLUTEN-FREE PRODUCTS MARKET, BY FORM

8. INTRODUCTION

8.2 SOLID
8.2. WIDESPREAD AVAILABILITY OF SOLID GLUTEN-FREE PRODUCTS TO FUEL MARKET GROWTH
8.3 LIQUID
8.3. INCREASING PREFERENCES FOR GLUTEN-FREE BEVERAGES AND DRESSINGS TO DRIVE MARKET

9 GLUTEN-FREE PRODUCTS MARKET, BY SOURCE

9. INTRODUCTION

9.2 ANIMAL

9.2. DAIRY
9.2.2 MEAT
9.3 PLANT
9.3. RICE & CORN
9.3.2 OILSEEDS & PULSES
9.3.3 OTHER PLANT-BASED SOURCES
9.3.3. Sorghum & oats
9.3.3.2 Millets
9.3.3.3 Tuber crops
9.3.3.4 Pseudocereals

10 GLUTEN-FREE PRODUCTS MARKET, BY TYPE

10. INTRODUCTION

10.2 BAKERY PRODUCTS
10.2. RISING INCLINATION TOWARD ADOPTING GLUTEN-FREE DIETARY LIFESTYLES TO BOOST MARKET
10.2.1. Breads, rolls, buns, and cakes
10.2.1.2 Cookies, crackers, wafers, and biscuits
10.2.1.3 Baking mixes & flours
10.3 SNACKS & RTE PRODUCTS
10.3. HEALTH-BENEFITING VALUE ADDITIONS TO DRIVE MARKET
10.4 PIZZAS & PASTAS
10.4. INCREASING PREFERENCE FOR CONVENIENT, STOMACH-FILLING, AND SENSORY-APPEALING FOODS TO BOOST MARKET
10.5 CONDIMENTS & DRESSINGS
10.5. RISING DEMAND FOR GLUTEN-FREE ADD-ONS AND INCREASING PREFERENCE FOR STRICT GLUTEN-FREE DIETARY LIFESTYLES TO FUEL MARKET GROWTH
10.6 OTHER TYPES

1 GLUTEN-FREE PRODUCTS MARKET, BY REGION

11. INTRODUCTION

11.2 NORTH AMERICA
11.2. US
11.2.1. Rising demand for special diets such as gluten-free, lactose-free, and vegan to

fuel market growth
11.2.2 CANADA
11.2.2. Surging demand for safe, reliable, and high-quality gluten-free options to accelerate market growth
11.2.3 MEXICO
11.2.3. Increase in consumer inclination toward gluten-free products to propel market growth
11.3 SOUTH AMERICA
11.3. BRAZIL
11.3.1. Increasing health consciousness and stringent gluten-free labeling requirements to propel market growth
11.3.2 ARGENTINA
11.3.2. Growing awareness regarding food intolerance to boost market
11.3.3 REST OF SOUTH AMERICA
11.4 ASIA PACIFIC
11.4. AUSTRALIA
11.4.1. Rising export activities and increasing consumer awareness to accelerate market growth
11.4.2 NEW ZEALAND
11.4.2. Various initiatives for promotion and commercialization of gluten-free products to fuel market growth
11.4.3 INDIA
11.4.3. Lack of awareness and low rate of diagnosis of celiac disease likely to hinder market growth
11.4.4 CHINA
11.4.4. Limited awareness about gluten and gluten-free lifestyles to impact market growth
11.4.5 JAPAN
11.4.5. Increasing tourism and rising local production of gluten-free products to aid market growth
11.4.6 REST OF ASIA PACIFIC
11.5 EUROPE
11.5. ITALY
11.5.1. Government initiatives and increasing investments in research and development to boost market
11.5.2 GERMANY
11.5.2. Rising consumer preference for healthier foods supported by initiatives for spreading awareness to foster market growth
11.5.3 UK

11.5.3. Increase in gluten-free consumer demand and regulatory clarity to expand market opportunities
11.5.4 FRANCE
11.5.4. Increasing adoption of free-from foods into daily diets to boost market
11.5.5 SPAIN
11.5.5. Growing awareness regarding gluten-free products to bolster market
11.5.6 NETHERLANDS
11.5.6. Rising trend of adopting specific dietary lifestyles to drive market
11.5.7 FINLAND
11.5.7. Rise in celiac disease prevalence to fuel market growth
11.5.8 RUSSIA
11.5.8. Growing inclination toward free-from products to boost market
11.5.9 REST OF EUROPE
11.6 ROW
11.6. MIDDLE EAST
11.6.1. Increasing purchasing power and inclination toward premium food products with value-added health benefits to bolster market growth
11.6.2 AFRICA
11.6.2. Preferences for healthier dietary lifestyles and growth in distribution channels to drive market

12 COMPETITIVE LANDSCAPE

12. OVERVIEW

12.2 KEY PLAYER STRATEGIES/RIGHT TO WIN
12.3 REVENUE ANALYSIS
12.4 MARKET SHARE ANALYSIS, 2023
12.4. MARKET RANKING ANALYSIS
12.5 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023
12.5. STARS
12.5.2 EMERGING LEADERS
12.5.3 PERVASIVE PLAYERS
12.5.4 PARTICIPANTS
12.5.5 COMPANY FOOTPRINT: KEY PLAYERS, 2023
12.5.5. Company footprint
12.5.5.2 Source footprint
12.5.5.3 Type footprint

12.5.5.4 Form footprint
12.5.5.5 Region footprint
12.6 COMPANY EVALUATION MATRIX: START-UPS/SMES, 2023
12.6. PROGRESSIVE COMPANIES
12.6.2 RESPONSIVE COMPANIES
12.6.3 DYNAMIC COMPANIES
12.6.4 STARTING BLOCKS
12.6.5 COMPETITIVE BENCHMARKING: START-UPS/SMES, 2023
12.6.5. Key start-ups/SMEs
12.6.5.2 Competitive benchmarking of key start-ups/SMEs
12.7 COMPANY VALUATION AND FINANCIAL METRICS
12.8 BRAND/PRODUCT COMPARISON
12.9 COMPETITIVE SCENARIO AND TRENDS
12.9. PRODUCT LAUNCHES AND ENHANCEMENTS
12.9.2 DEALS
12.9.3 EXPANSIONS
12.9.4 OTHER DEALS/DEVELOPMENTS

13 COMPANY PROFILES

13. KEY PLAYERS

13.1. THE KRAFT HEINZ COMPANY
13.1.1. Business overview
13.1.1.2 Products/Solutions/Services offered
13.1.1.3 Recent developments
13.1.1.3. Product launches
13.1.1.3.2 Other developments
13.1.1.4 MnM view
13.1.1.4. Right to win
13.1.1.4.2 Strategic choices made
13.1.1.4.3 Weaknesses and competitive threats
13.1.2 GENERAL MILLS INC.
13.1.2. Business overview
13.1.2.2 Products/Solutions/Services offered
13.1.2.3 Recent developments
13.1.2.3. Product launches
13.1.2.4 MnM view
13.1.2.4. Right to win

13.1.2.4.2 Strategic choices made
13.1.2.4.3 Weaknesses and competitive threats
13.1.3 CONAGRA BRANDS, INC.
13.1.3. Business overview
13.1.3.2 Products/Solutions/Services offered
13.1.3.3 Recent developments
13.1.3.3. Product launches
13.1.3.4 MnM view
13.1.3.4. Right to win
13.1.3.4.2 Strategic choices made
13.1.3.4.3 Weaknesses and competitive threats
13.1.4 KELLANOVA
13.1.4. Business overview
13.1.4.2 Products/Solutions/Services offered
13.1.4.3 Recent developments
13.1.4.3. Other developments
13.1.4.4 MnM view
13.1.4.4. Right to win
13.1.4.4.2 Strategic choices made
13.1.4.4.3 Weaknesses and competitive threats
13.1.5 BARILLA G. E R. F.LLI S.P.A.
13.1.5. Business overview
13.1.5.2 Products/Solutions/Services offered
13.1.5.3 Recent developments
13.1.5.3. Deals
13.1.5.4 MnM view
13.1.5.4. Right to win
13.1.5.4.2 Strategic choices made
13.1.5.4.3 Weaknesses and competitive threats
13.1.6 THE HAIN CELESTIAL GROUP
13.1.6. Business overview
13.1.6.2 Products/Solutions/Services offered
13.1.6.3 Recent developments
13.1.6.3. Product launches
13.1.6.3.2 Expansions
13.1.6.3.3 Deals
13.1.6.4 MnM view
13.1.7 RAISIO OYJ
13.1.7. Business overview

13.1.7.2 Products/Solutions/Services offered
13.1.7.3 Recent developments
13.1.7.3. Product launches
13.1.7.3.2 Expansions
13.1.7.3.3 Deals
13.1.7.4 MnM view
13.1.8 DR. SCH?R AG / SPA
13.1.8. Business overview
13.1.8.2 Products/Solutions/Services offered
13.1.8.3 Recent developments
13.1.8.3. Expansions
13.1.8.3.2 Deals
13.1.8.4 MnM view
13.1.9 ECOTONE
13.1.9. Business overview
13.1.9.2 Products/Solutions/Services offered
13.1.9.3 Recent developments
13.1.9.3. Other developments
13.1.9.4 MnM view
13.1.10 ENJOY LIFE
13.1.10. Business overview
13.1.10.2 Products/Solutions/Services offered
13.1.10.3 MnM view
13.1.1 ALARA WHOLEFOODS LTD
13.1.11. Business overview
13.1.11.2 Products/Solutions/Services offered
13.1.11.3 Recent developments
13.1.11.3. Expansions
13.1.11.4 MnM view
13.1.12 KATZ GLUTEN FREE
13.1.12. Business overview
13.1.12.2 Products/Solutions/Services offered
13.1.12.3 MnM view
13.1.13 GENIUS FOODS
13.1.13. Business overview
13.1.13.2 Products/Solutions/Services offered
13.1.13.3 Recent developments
13.1.13.3. Expansions
13.1.13.3.2 Deals

13.1.13.4 MnM view
13.1.14 SILLY YAKS - FOR REAL TASTE
13.1.14. Business overview
13.1.14.2 Products/Solutions/Services offered
13.1.14.3 MnM view
13.1.15 NORSIDE FOODS LTD.
13.1.15. Business overview
13.1.15.2 Products/Solutions/Services offered
13.1.15.3 MnM view
13.2 OTHER PLAYERS
13.2. CHOSEN FOODS LLC
13.2.1. Business overview
13.2.1.2 Products/Solutions/Services offered
13.2.1.3 Recent developments
13.2.1.3. Deals
13.2.1.4 MnM view
13.2.2 FARMO S.P.A.
13.2.2. Business overview
13.2.2.2 Products/Solutions/Services offered
13.2.2.3 MnM view
13.2.3 PARTAKE FOODS
13.2.3. Business overview
13.2.3.2 Products/Solutions/Services offered
13.2.3.3 Recent developments
13.2.3.3. Deals
13.2.3.4 MnM view
13.2.4 SOOM FOODS
13.2.4. Business overview
13.2.4.2 Products/Solutions/Services offered
13.2.4.3 MnM view
13.2.5 CAPPELLO’S
13.2.5. Business overview
13.2.5.2 Products/Solutions/Services offered
13.2.5.3 MnM view
13.2.6 ALOHA
13.2.7 FREE2B FOODS, LLC
13.2.8 GLUTEN FREE KITCHEN
13.2.9 THE PALEO FOODS CO.
13.2.10 BANZA

+357 96 030922
info@marketpublishers.com

14 ADJACENT & RELATED MARKETS

14. INTRODUCTION

14.2 LIMITATIONS
14.3 SOYABEAN FOOD & BEVERAGE PRODUCTS MARKET
14.3. MARKET DEFINITION
  14.3.2 MARKET OVERVIEW
14.4 SAVORY SNACK PRODUCTS MARKET
14.4. MARKET DEFINITION
  14.4.2 MARKET OVERVIEW
14.5 CLEAN-LABEL INGREDIENTS MARKET
14.5. MARKET DEFINITION
  14.5.2 MARKET OVERVIEW

15 APPENDIX

15. DISCUSSION GUIDE

15.2 KNOWLEDGESTORE: MARKETSANDMARKETS’ SUBSCRIPTION PORTAL
15.3 CUSTOMIZATION OPTIONS
15.4 RELATED REPORTS
15.5 AUTHOR DETAILS

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About

The report, “Gluten-Free Products Market by Type (Bakery & Confectionery, Snacks, Breakfast Cereals, Baking Mixes & Flour, and Meat & Poultry Products), Sales Channel (Natural & Conventional) & Geography - Global Trends & Forecasts to 2019” defines and segments the gluten-free products market with an analysis and projection of the size of the global market, in terms of value ($million) and volume (‘000 tons).

Gluten-free food is an innovative gourmet food that is suitable for people living with food allergies and gluten intolerance. Gluten-free food is normally seen as a diet for those with celiac disease (also known as gluten intolerance), but people with a gluten tolerance. These people should also avoid grains rich in gluten, such as wheat, rye, and barley among others. At least 1% of all the Americans are diagnosed with celiac disease.

The size of the gluten-free products market is projected for types such as bakery & confectionery, breakfast cereal, snacks, baking mix & flour, and meat & poultry products, based on the key regions such as North America, Europe, Asia-Pacific, and Rest of the World (ROW).

The increase in population has a tremendous impact on the global food supply. The nutrition and quality concerns of the food have received widespread attention. Various government and private industries have come a long way to achieve high standards for safe, unadulterated, and nutritious food. The gluten-free products market has witnessed a revolution where these products were seen as a specialty product for a niche market, and today they are known as mainstream sensation products. Millions of people in the world are following a gluten-free diet and this has become an identity for those who have stopped consuming gluten containing cereals such as wheat, barley, and rye. A continuous increase in consumer demand has driven the growth in the gluten-free products market.

In this report, the gluten-free products market is divided into four geographical segments, North America, Europe, Asia-Pacific, and ROW. The North American region constitutes the largest market, dominated by U.S., followed by Europe. North America is projected to witness the highest growth rate in the market.

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