

HPP (High Pressure Processing) Market by Equipment Type (Orientation, Vessel Size), Application (Meat, Seafood, Beverage, Fruit & Vegetable), Product Type (Meat & Poultry, Seafood, Juice, Ready Meal, Fruit & Vegetable) & Geography - Forecast to 2018

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Abstracts

HPP technology is used for food products that have high liquid content. The technology is utilized in the commercial market to process fruits, juices, etc. It is used extensively by food and beverage manufacturers located in the U.S. and Spain to extend the products' shelf life and improve food safety. The food & beverage processors create products that are minimally processed with a clean label. Clean label products are those products that are prepared from ingredients that consumers can recognize and understand. High Pressure Processing technology is also implemented by meat & seafood processors to meet the desired tenderness and extract the meat from crustaceans. The HPP market is divided into High Pressure Processing equipment market and HPP products market.

Both Bottom-up and Top-Down approaches have been used to derive the market value (\$Million) of HPP equipment market. The market value is estimated with the use of company revenue of key players and primary research. The HPP products market is also derived using both Bottom-up and Top-Down approaches. The High Pressure Processing products market are projected in terms of value (\$Million) as well as volume (KT).

Companies such as Avure Technologies Inc. (U.S.) and Hiperbaric Espuna (Spain) are leaders in the HPP equipment market. Companies such as Hormel food corporation (U.S), Esteban Espuna SA (Spain), and several others commercialize their product range with this technology. The market value of HPP equipment has been segmented

on the basis of types, applications, end-users, and geography. The HPP food products market is divided into segments such as types and geography. The report provides a complete description of key players, market trends, drivers, opportunities, and restraints in the High Pressure Processing equipment and food products market.

HPP Equipment: Market Value, By Applications, 2011-2012 (\$Million)

HPP Equipment Market

Source: MarketsandMarkets Analysis

The HPP equipment market value is projected to grow at a CAGR of 24%. The market was dominated by the fruit & vegetable application in 2012. The processors of fresh products utilize High Pressure Processing technology to retain the freshness and natural taste of products such as fruit & vegetable, juices, etc.

HPP Products: Market Value, By Region, 2011-2012 (\$Million)

HPP Products Market

Source: MarketsandMarkets Analysis

HPP products market was dominated by North America in 2012. The HPP products market value has increased from 2011 to 2012 and is projected to reach about \$14 million by 2018. The U.S. is the largest consumer of High Pressure Processing products in North America. The market in Spain is highly developed due to the availability and awareness of HPP equipment.

Scope of the report

HPP equipment market segmentation:

By Types

In terms of their orientation:

Vertical

Horizontal

In terms of the HPP equipment by vessel sizes:

Less than 100L

100L to 250L

250L to 500L

More than 500L

By Food applications:

Meat

Fruit Vegetable

Juice Beverage

Seafood

Others (Dairy, Ready meals, etc.)

By End-users:

SMEs

Large production plants

Groups (MNCs and conglomerates)

By Geography:

North America

Europe

Asia

Pacific

Rest of the World (ROW)

HPP products market segmentation:

High Pressure Processing product types:

Meat & Poultry products

Dairy Products

Fruit Vegetable

Seafood Products

Ready Meals

Juices

Others (Wet salad, dips, purees, grains, etc.)

By Geography:

North America

Europe

Asia

Pacific

Rest of the World (ROW)

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About

In 2012, the HPP equipment market was dominated, primarily, by North America. The key market in North America was the U.S., followed by Mexico, and Canada. Europe accounted for XX% of the HPP equipment value share that was dominated by Spain. Asia is still in the nascent stage of the HPP equipment market with Japan, South Korea, and China at the forefront. Asia and Pacific region together accounted for XX% of the HPP equipment, globally. The Rest of the World (ROW) that includes Latin America, the Middle East and Africa, together accounted for XX% of the HPP equipment. Peru and Chile were the key countries that have HPP equipment.

The HPP market was segmented on the basis of equipment and products. The HPP equipment market is further segmented on the basis of equipment types, end-users, applications, and geography. The HPP products market is segmented on the basis of food types and geography. The type of HPP equipment market is segmented based on equipment orientation and vessel sizes. The end-users of HPP equipment include SMEs, large production plants, and company groups. The applications of HPP equipment is segmented into meat, fruit & vegetable, juice & beverage, seafood, and others. The HPP products by type is segmented into meat & poultry products, fruit & vegetable, seafood products, ready meals, juices, and others that comprise of dairy, wet salads, etc. The market is segmented based on the geographic consumption of HPP products that comprises of North America, Europe, Asia, Pacific, and Rest of the World (ROW).

HPP market was the largest in North America and continues to grow. The equipment market for HPP equipment is in its development and growth phase. The HPP products market is in its growth phase and is projected to grow further. Several HPP products are exported in different geographical regions. The European market is projected to be the fastest growing region due to increasing demand for HPP products in Spain and Italy. HPP products market in Asia, Pacific, and the ROW region is still in the development phase as few food companies use HPP technology to process their food products.

The HPP equipment market is driven by an increasing demand for horizontal equipment and R&D for new vessel sizes to reduce the cost of productivity. The opportunities foreseen in the market include toll processors and novel product development. The only restraint in the market is the high cost of HPP equipment.

The HPP market is influenced by consumers. The current market trend indicate the consumer demand for clean label, high quality, natural, and additive-free products. Due to minimal processing, they retain their flavor compounds, vitamins, and minerals. HPP technology is also influenced by regulatory bodies, who demand safety as well as minimal processing of food. Regulatory bodies such as FDA, USDA, etc. have accepted food processing under high pressure in the U.S. The government bodies are also concerned for the safety of food products, and they demand environmental friendly technology, which is met by high pressure processing.

The shareholders that adopt HPP technology gain high returns on investment, growth, and benefits. The food companies adopt HPP as an advanced technology with a focus on R&D to offer innovative products with novel textures in protein-based or starch-based foods. Distributors can stock HPP processed food products as they have extended shelf life.

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