

# **Meat Starter Cultures Market by Application (Sausages, Salami, Dry-cured meat, and Others), Microorganism(Bacteria, and Fungi), Composition (Multi-strain mix, Single strain, and Multi-strain), Form, and Region - Global Forecast to 2025**

<https://marketpublishers.com/r/MF3D26B47627EN.html>

Date: October 2020

Pages: 168

Price: US\$ 4,950.00 (Single User License)

ID: MF3D26B47627EN

## **Abstracts**

According to MarketsandMarkets, the global meat starter cultures market size is estimated to be valued at USD 62 million in 2020 and projected to reach USD 76 million by 2025, recording a CAGR of 3.9%. The market is driven primarily by factors such as increasing consumption of processed meat with higher shelf-life. North America is projected to be the fastest-growing regional market. North American countries, especially US, have emerged as leading destinations, as major companies are investing in these countries. The major restraints in the growth of the meat starter cultures market is the stringent regulations for the usage of meat starter cultures and concerns over the quality of meat starter cultures used in meat products.

“By application, the salami segment is projected to grow at the highest CAGR during the forecast period.”

Based on the application, the salami segment is expected to be the fastest-growing during the forecast period. This segment is rapidly growing, mainly due to the increasing demand for fermented meat, in which meat starter cultures are considered to be a crucial food additives. the beneficial and attractive meat starter cultures are purified and produced under hygienic conditions to provide the desired acidification, flavor, and color according to the consumer's preferences. Meat starter cultures exhibit a protective action on fermented meat either by producing bactericidal or bacteriostatic compounds such as bacteriocins, resulting in extending the shelf-life of the salami.

“By Composition, the multi-strain mix segment is estimated to account for the largest share.”

The multi-strain mix segment of the meat starter cultures is dominating the market. Multi-strain mixes have been a mixture of strains in which the identity of component strains is mostly unknown, and their composition varies according to the subculture. These cultures comprise strain mixtures consisting of various bacteria/yeasts. Each strain in these products offers different functions and inhibits the growth of other detrimental microorganisms, thereby augmenting the meat product's shelf-life. Multi-strain mixes are used in known concentrations to promote and conduct fermentation in meat products.

“The North America region is projected to grow at the highest CAGR during the forecast period”

North America is projected to be the fastest-growing market for the period considered for this study, due to the rise in demand for convenience & processed meat products with higher shelf-life, along with the growing demand for clean-label organic meat products, leading to increased demand for meat starter cultures in the region. With a few key players such as DuPont (US), Lallemand (Canada), Canada Compound (Canada), and Codex-ing (US) in the North American region, there has been a robust development in terms of technological advancements for the usage of meat starter cultures.

The meat starter cultures market is segmented region-wise, with a detailed analysis of each region. These regions include Asia Pacific, North America, Europe, and RoW (South America, Middle East and Africa).

#### Break-up of Primaries

By Company Type: Tier 1 – 35%, Tier 2 – 25% and Tier 3 – 40%

By Designation:Managers– 40%, CXOs - 35%, and Executives – 25%

By Region: Europe - 40%, Asia Pacific - 35%, North America- 15%, and RoW - 10%

Leading players profiled in this report include the following:

Chr. Hansen (Denmark)

DSM (Netherlands)

Kerry (Ireland)

DuPont (US)

Frutarom (Israel)

Galactic (Belgium)

Lallemand (Canada)

Proquiga (Spain)

Westcombe (UK)

Biochem SRL (Italy)

RAPS GmbH (Germany)

DnR Sausages Supplies (Canada)

Sacco System (Italy)

Canada Compound (Canada)

Biovitec (France)

Genesis Laboratories (Bulgaria)

Meat Cracks (Germany)

THT S.A. (Belgium)

Stuffers Supply Co. (Canada)

MicroTec GmbH (Germany)

## Codex-Ing Biotech (US)

### Research Coverage

This report segments the meat starter cultures market on the basis of application, microorganism, composition, and region. In terms of insights, this research report focuses on various levels of analyses—competitive landscape, pricing insights, end-use analysis, and company profiles—which together comprise and discuss the basic views on the emerging & high-growth segments of the meat starter cultures market, high-growth regions, countries, industry trends, drivers, restraints, opportunities, and challenges.

### Reasons to buy this report

To get a comprehensive overview of the meat starter cultures market

To gain wide-ranging information about the top players in this industry, their product portfolio details, and the key strategies adopted by them

To gain insights about the major countries/regions, in which the meat starter cultures market is flourishing

## Contents

### 1 INTRODUCTION

1.1 OBJECTIVES OF THE STUDY

1.2 MARKET DEFINITION

1.3 STUDY SCOPE

FIGURE 1 MEAT STARTER CULTURES MARKET SEGMENTATION

1.4 REGIONS COVERED

1.5 PERIODIZATION CONSIDERED

1.6 CURRENCY CONSIDERED

TABLE 1 USD EXCHANGE RATES CONSIDERED, 2017–2019

1.7 VOLUME UNIT CONSIDERED

1.8 STAKEHOLDERS

### 2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 MEAT STARTER CULTURES MARKET: RESEARCH DESIGN

FIGURE 3 KEY DATA FROM PRIMARY SOURCES

2.2 MARKET SIZE ESTIMATION

2.2.1 APPROACH ONE (DEMAND SIDE)

2.2.2 APPROACH TWO (SUPPLY SIDE)

2.3 DATA TRIANGULATION

FIGURE 4 DATA TRIANGULATION METHODOLOGY

2.4 ASSUMPTIONS FOR THE STUDY

2.5 LIMITATIONS OF THE STUDY

2.6 SCENARIO-BASED MODELING

2.7 INTRODUCTION TO COVID-19

2.8 COVID-19 HEALTH ASSESSMENT

FIGURE 5 COVID-19: THE GLOBAL PROPAGATION

FIGURE 6 COVID-19 PROPAGATION: SELECT COUNTRIES

2.9 COVID-19 ECONOMIC ASSESSMENT

FIGURE 7 REVISED GROSS DOMESTIC PRODUCT FORECASTS FOR SELECT G20 COUNTRIES IN 2020

2.9.1 COVID-19 ECONOMIC IMPACT—SCENARIO ASSESSMENT

FIGURE 8 CRITERIA IMPACTING THE GLOBAL ECONOMY

FIGURE 9 SCENARIOS IN TERMS OF RECOVERY OF THE GLOBAL ECONOMY

### 3 EXECUTIVE SUMMARY

TABLE 2 MEAT STARTER CULTURES MARKET SHARE SNAPSHOT, 2020 VS. 2025, BY VALUE

FIGURE 10 IMPACT OF COVID-19 ON MEAT STARTER CULTURES MARKET SIZE, BY SCENARIO, 2020 VS. 2021 (USD MILLION)

FIGURE 11 MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2020 VS. 2025 (USD MILLION)

FIGURE 12 MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2020 VS. 2025 (USD MILLION)

FIGURE 13 MEAT STARTER CULTURES MARKET SIZE, BY MICROORGANISM, 2020 VS. 2025 (USD MILLION)

FIGURE 14 MEAT STARTER CULTURES MARKET SHARE (VALUE), BY REGION, 2019

### 4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES IN THE MEAT STARTER CULTURES MARKET

FIGURE 15 GROWING DEMAND FOR PROCESSED AND PACKAGED MEAT IS EXPECTED TO PROPEL THE MARKET FOR MEAT STARTER CULTURES

4.2 MEAT STARTER CULTURES MARKET: MAJOR REGIONAL SUBMARKETS

FIGURE 16 EUROPE WAS THE LARGEST MARKET GLOBALLY FOR MEAT STARTER CULTURES IN 2019

4.3 EUROPE: MEAT STARTER CULTURES MARKET, BY KEY APPLICATION & COUNTRY

FIGURE 17 GERMANY ACCOUNTED FOR THE LARGEST SHARE IN THE EUROPEAN MARKET IN 2019

4.4 MEAT STARTER CULTURES MARKET, BY APPLICATION & REGION

FIGURE 18 EUROPE IS PROJECTED TO DOMINATE THE MARKET FOR MEAT STARTER CULTURES DURING THE FORECAST PERIOD

4.5 MEAT STARTER CULTURES MARKET, BY COMPOSITION

FIGURE 19 THE MULTI-STRAIN MIX SEGMENT IS PROJECTED TO DOMINATE THE MEAT STARTER CULTURES MARKET DURING THE FORECAST PERIOD

4.6 MEAT STARTER CULTURES MARKET, BY MICROORGANISM

FIGURE 20 EUROPE DOMINATED BOTH MICROORGANISMS OF MEAT STARTER CULTURES IN 2019

FIGURE 21 COVID-19 IMPACT ON THE MEAT STARTER CULTURES MARKET COMPARISON OF PRE- AND POST-COVID-19 SCENARIOS

## 5 MARKET OVERVIEW

### 5.1 INTRODUCTION

### 5.2 MARKET DYNAMICS

#### FIGURE 22 MEAT STARTER CULTURES MARKET DYNAMICS

##### 5.2.1 DRIVERS

5.2.1.1 Consumer inclination toward packaged food products with higher shelf-life

#### FIGURE 23 INDIA: ANNUAL WASTAGE PER PRODUCTION VOLUME

5.2.1.2 Augmenting demand for clean-label processed meat products

#### FIGURE 24 US: MEAT PRODUCTION, BY MEAT TYPE, 2017 (BILLION KG)

5.2.1.3 Technological advancements for the development of meat starter cultures

##### 5.2.2 RESTRAINTS

5.2.2.1 Stringent government regulations for the use of starter cultures in processed meat products

5.2.2.2 Concern over the quality of starter cultures used in meat products

##### 5.2.3 OPPORTUNITIES

5.2.3.1 Increase in the organized retail sector boosts distribution and availability of packaged meat products

#### FIGURE 25 US: RETAIL SALES, 2010–2019 (USD TRILLION)

5.2.3.2 Rise in consumer adaption rate for packaged meat products in Asia Pacific and meat exports in South America

#### TABLE 3 FROZEN BEEF IMPORTS, BY COUNTRY, 2019 (USD BILLION)

##### 5.2.4 CHALLENGES

5.2.4.1 Lack of proper technology for the usage and monitoring of meat starter cultures in developing regions

5.2.4.2 Rise in vegan population and consumer shift toward plant-based meat alternatives

#### FIGURE 26 US: ANNUAL SALES OF PLANT-BASED FOOD & BEVERAGES, 2017–2019 (USD BILLION)

### 5.3 COVID-19 DRIVERS

### 5.4 ECOSYSTEM/MARKET MAP

#### FIGURE 27 MARKET ECOSYSTEM

#### FIGURE 28 MARKET MAP

### 5.5 GLOBAL AVERAGE PRICE OF MEAT STARTER CULTURES (USD/KG)

### 5.6 SUPPLY CHAIN

#### FIGURE 29 MEAT STARTER CULTURES MARKET: SUPPLY CHAIN

### 5.7 VALUE CHAIN

**FIGURE 30 MEAT STARTER CULTURES MARKET: VALUE CHAIN****5.8 PATENT ANALYSIS****TABLE 4 PATENT REGISTRATION, 2013–2017****5.9 YC - YCC SHIFT****FIGURE 31 YC & YCC SHIFT FOR THE MEAT STARTER CULTURES MARKET****6 MEAT STARTER CULTURES MARKET, BY APPLICATION****6.1 INTRODUCTION****FIGURE 32 MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2020 VS. 2025 (USD MILLION)****TABLE 5 MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD MILLION)****6.1.1 COVID-19 IMPACT ON THE MEAT STARTER CULTURES MARKET, BY APPLICATION****6.1.1.1 Optimistic Scenario****TABLE 6 OPTIMISTIC SCENARIO: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2021 (USD MILLION)****6.1.1.2 Realistic Scenario****TABLE 7 REALISTIC SCENARIO: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2021 (USD MILLION)****6.1.1.3 Pessimistic Scenario****TABLE 8 PESSIMISTIC SCENARIO: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2021 (USD MILLION)****6.2 SAUSAGES****6.2.1 RISE IN DEMAND FOR SAUSAGES AS BREAKFAST MEAT AUGMENTS THE DEMAND FOR MEAT STARTER CULTURES****TABLE 9 MEAT STARTER CULTURES MARKET SIZE FOR SAUSAGES, BY REGION, 2018–2025 (USD THOUSAND)****6.3 SALAMI****6.3.1 MEAT STARTER CULTURE DEMAND HAS BEEN RISING DUE TO INCREASING DEMAND FOR SALAMI IN EUROPE****TABLE 10 MEAT STARTER CULTURES MARKET SIZE FOR SALAMI, BY REGION, 2018–2025 (USD THOUSAND)****6.4 DRY-CURED MEATS****6.4.1 MEAT STARTER CULTURES HELP IN THE EFFECTIVE PRESERVATION OF DRY-CURED MEAT****TABLE 11 MEAT STARTER CULTURES MARKET SIZE FOR DRY-CURED MEAT, BY REGION, 2018–2025 (USD THOUSAND)**



## 6.5 OTHER APPLICATIONS

### 6.5.1 CHANGING CONSUMER PREFERENCES AUGMENTS DEMAND FOR CLEAN-LABEL MEAT PRODUCTS

TABLE 12 MEAT STARTER CULTURES MARKET SIZE FOR OTHER APPLICATIONS, BY REGION, 2018–2025 (USD THOUSAND)

## 7 MEAT STARTER CULTURES MARKET, BY COMPOSITION

### 7.1 INTRODUCTION

FIGURE 33 MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2020 VS. 2025 (USD MILLION)

TABLE 13 MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD MILLION)

#### 7.1.1 COVID-19 IMPACT ON THE MEAT STARTER CULTURES MARKET, BY COMPOSITION

##### 7.1.1.1 Optimistic Scenario

TABLE 14 OPTIMISTIC SCENARIO: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2021 (USD MILLION)

##### 7.1.1.2 Realistic Scenario

TABLE 15 REALISTIC SCENARIO: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2021 (USD MILLION)

##### 7.1.1.3 Pessimistic Scenario

TABLE 16 PESSIMISTIC SCENARIO: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2021 (USD MILLION)

### 7.2 MULTI-STRAIN MIX

7.2.1 MULTI-STRAIN MIX HELPS INCORPORATE ADJUNCT FUNCTIONS TO THE MEAT PRODUCT

TABLE 17 MULTI-STRAIN MIX MEAT STARTER CULTURES MARKET SIZE, BY REGION, 2018–2025 (USD THOUSAND)

### 7.3 SINGLE-STRAIN

7.3.1 SINGLE-STRAIN STARTER CULTURES MAJORLY HELPS ATTAIN UNIFORM FLAVOR PROFILE DEVELOPMENT

TABLE 18 SINGLE-STRAIN MEAT STARTER CULTURES MARKET SIZE, BY REGION, 2018–2025 (USD THOUSAND)

### 7.4 MULTI-STRAIN

7.4.1 MULTI-STRAIN MESOPHILIC STARTER CULTURES HAVE BEEN IN HIGH DEMAND ACROSS DEVELOPING ECONOMIES

TABLE 19 MULTI-STRAIN MEAT STARTER CULTURES MARKET SIZE, BY REGION, 2018–2025 (USD THOUSAND)

## **8 MEAT STARTER CULTURES MARKET, BY MICROORGANISM**

### **8.1 INTRODUCTION**

FIGURE 34 MEAT STARTER CULTURES MARKET SIZE, BY MICROORGANISM, 2020 VS. 2025 (USD MILLION)

TABLE 20 MEAT STARTER CULTURES MARKET SIZE, BY MICROORGANISM, 2018–2025 (USD MILLION)

8.1.1 COVID-19 IMPACT ON THE MEAT STARTER CULTURES MARKET, BY MICROORGANISM

8.1.1.1 Optimistic Scenario

TABLE 21 OPTIMISTIC SCENARIO: MEAT STARTER CULTURES MARKET SIZE, BY MICROORGANISM, 2018–2021 (USD MILLION)

8.1.1.2 Realistic Scenario

TABLE 22 REALISTIC SCENARIO: MEAT STARTER CULTURES MARKET SIZE, BY MICROORGANISM, 2018–2021 (USD MILLION)

8.1.1.3 Pessimistic Scenario

TABLE 23 PESSIMISTIC SCENARIO: MEAT STARTER CULTURES MARKET SIZE, BY MICROORGANISM, 2018–2021 (USD MILLION)

### **8.2 BACTERIA**

8.2.1 LACTIC ACID BACTERIA (LAB) ARE THE MOST PREFERRED IN THE MEAT INDUSTRY

TABLE 24 BACTERIA-BASED MEAT STARTER CULTURES MARKET SIZE, BY REGION, 2018–2025 (USD MILLION)

### **8.3 FUNGI**

8.3.1 MOLDS AND YEAST ARE MOSTLY USED IN SAUSAGES AND OTHER MEAT ITEMS

TABLE 25 FUNGI-BASED MEAT STARTER CULTURES MARKET SIZE, BY REGION, 2018–2025 (USD MILLION)

## **9 MEAT STARTER CULTURES MARKET, BY FORM**

### **9.1 INTRODUCTION**

### **9.2 FREEZE-DRIED**

### **9.3 FROZEN**

## **10 MEAT STARTER CULTURES MARKET, BY REGION**

### **10.1 INTRODUCTION**

FIGURE 35 REGIONAL SNAPSHOT: NORTH AMERICA HAS SIGNIFICANT GROWTH RATES FOR MEAT STARTER CULTURES

TABLE 26 MEAT STARTER CULTURES MARKET SIZE, BY REGION, 2018–2025 (USD MILLION)

TABLE 27 MEAT STARTER CULTURES MARKET SIZE, BY REGION, 2018–2025 (KG)

TABLE 28 AVERAGE PRICE OF MEAT STARTER CULTURES, BY REGION (USD/KG)

10.1.1 COVID-19 IMPACT ON THE MEAT STARTER CULTURES MARKET, BY REGION

10.1.1.1 Optimistic Scenario

TABLE 29 OPTIMISTIC SCENARIO: MEAT STARTER CULTURES MARKET SIZE, BY REGION, 2018–2021 (USD MILLION)

10.1.1.2 Realistic Scenario

TABLE 30 REALISTIC SCENARIO: MEAT STARTER CULTURES MARKET SIZE, BY REGION, 2018–2021 (USD MILLION)

10.1.1.3 Pessimistic Scenario

TABLE 31 PESSIMISTIC SCENARIO: MEAT STARTER CULTURES MARKET SIZE, BY REGION, 2018–2021 (USD MILLION)

10.2 REGULATORY FRAMEWORK

10.3 NORTH AMERICA

FIGURE 36 NORTH AMERICA: MARKET SNAPSHOT

TABLE 32 NORTH AMERICA: MEAT STARTER CULTURES MARKET SIZE, BY COUNTRY, 2018–2025 (USD MILLION)

TABLE 33 NORTH AMERICA: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 34 NORTH AMERICA: SAUSAGES MARKET SIZE, BY COUNTRY, 2018–2025 (USD THOUSAND)

TABLE 35 NORTH AMERICA: SALAMI MARKET SIZE, BY COUNTRY, 2018–2025 (USD THOUSAND)

TABLE 36 NORTH AMERICA: DRY-CURED MEAT MARKET SIZE, BY COUNTRY, 2018–2025 (USD THOUSAND)

TABLE 37 NORTH AMERICA: OTHER APPLICATIONS MARKET SIZE, BY COUNTRY, 2018–2025 (USD THOUSAND)

TABLE 38 NORTH AMERICA: MEAT STARTER CULTURES MARKET SIZE, BY MICROORGANISM, 2018–2025 (USD MILLION)

TABLE 39 NORTH AMERICA: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

TABLE 40 NORTH AMERICA: MULTI-STRAIN MIX MARKET SIZE, BY COUNTRY,

2018–2025 (USD THOUSAND)

TABLE 41 NORTH AMERICA: SINGLE-STRAIN MARKET SIZE, BY COUNTRY,  
2018–2025 (USD THOUSAND)

TABLE 42 NORTH AMERICA: MULTI-STRAIN MARKET SIZE, BY COUNTRY,  
2018–2025 (USD THOUSAND)

#### 10.3.1 US

10.3.1.1 The technological advancements related to meat starter cultures is expected to drive the market in the US

TABLE 43 US: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION,  
2018–2025 (USD THOUSAND)

TABLE 44 US: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION,  
2018–2025 (USD THOUSAND)

#### 10.3.2 CANADA

10.3.2.1 Local manufacturers dominate the starter cultures market in the country  
TABLE 45 CANADA: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION,  
2018–2025 (USD THOUSAND)

TABLE 46 CANADA: MEAT STARTER CULTURES MARKET SIZE, BY  
COMPOSITION, 2018–2025 (USD THOUSAND)

#### 10.3.3 MEXICO

10.3.3.1 Growth in meat exports to drive the market growth in Mexico  
TABLE 47 MEXICO: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION,  
2018–2025 (USD THOUSAND)

TABLE 48 MEXICO: MEAT STARTER CULTURES MARKET SIZE, BY  
COMPOSITION, 2018–2025 (USD THOUSAND)

### 10.4 EUROPE

FIGURE 37 EUROPE: MARKET SNAPSHOT

TABLE 49 EUROPE: MEAT STARTER CULTURES MARKET SIZE, BY  
COUNTRY/REGION, 2018–2025 (USD MILLION)

TABLE 50 EUROPE: MEAT STARTER CULTURES MARKET SIZE, BY  
APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 51 EUROPE: MEAT STARTER CULTURES MARKET SIZE FOR SAUSAGES,  
BY COUNTRY/REGION, 2018–2025 (USD THOUSAND)

TABLE 52 EUROPE: MEAT STARTER CULTURES SALAMI MARKET SIZE, BY  
COUNTRY/REGION, 2018–2025 (USD THOUSAND)

TABLE 53 EUROPE: MEAT STARTER CULTURES MARKET SIZE FOR DRY-CURED  
MEAT, BY COUNTRY/REGION, 2018–2025 (USD THOUSAND)

TABLE 54 EUROPE: MEAT STARTER CULTURES MARKET SIZE FOR OTHER  
APPLICATIONS, BY COUNTRY/REGION, 2018–2025 (USD THOUSAND)

TABLE 55 EUROPE: MEAT STARTER CULTURES MARKET SIZE, BY

MICROORGANISM, 2018–2025 (USD MILLION)

TABLE 56 EUROPE: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

TABLE 57 EUROPE: MULTI-STRAIN MEAT STARTER CULTURES MIX MARKET SIZE, BY COUNTRY, 2018–2025 (USD THOUSAND)

TABLE 58 EUROPE: SINGLE-STRAIN MEAT STARTER CULTURES MARKET SIZE, BY COUNTRY, 2018–2025 (USD THOUSAND)

TABLE 59 EUROPE: MULTI-STRAIN MEAT STARTER CULTURES MARKET SIZE, BY COUNTRY, 2018–2025 (USD THOUSAND)

#### 10.4.1 GERMANY

10.4.1.1 Increase in demand for clean-label meat products drive market growth in Germany

TABLE 60 GERMANY: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 61 GERMANY: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

#### 10.4.2 FRANCE

10.4.2.1 The governments' support for the meat industry is expected to drive the meat starter cultures market in France

TABLE 62 FRANCE: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 63 FRANCE: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

#### 10.4.3 SPAIN

10.4.3.1 Consumer shift toward nutritional meat products drives growth for meat starter cultures in the country

TABLE 64 SPAIN: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 65 SPAIN: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

#### 10.4.4 ITALY

10.4.4.1 Increase in meat sales are expected to drive the market for meat starter culture

TABLE 66 ITALY: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 67 ITALY: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

#### 10.4.5 UK

10.4.5.1 The rise in the vegan population poses a challenge for the meat starter

cultures market in the UK

TABLE 68 UK: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 69 UK: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

#### 10.4.6 NORDICS

10.4.6.1 The rise in demand for clean-label ingredients could propel the meat starter cultures market

TABLE 70 NORDICS: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 71 NORDICS: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

#### 10.4.7 RUSSIA

10.4.7.1 Augmenting meat demand and rising local manufacturers propel the meat starter cultures market

TABLE 72 RUSSIA: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 73 RUSSIA: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

#### 10.4.8 REST OF EUROPE

10.4.8.1 Belgium is among the leading processed meat product market, which drives the demand for meat starter culture

TABLE 74 REST OF EUROPE: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 75 REST OF EUROPE: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

#### 10.5 ASIA PACIFIC

TABLE 76 ASIA PACIFIC: MEAT STARTER CULTURES MARKET SIZE, BY COUNTRY/REGION, 2018–2025 (USD MILLION)

TABLE 77 ASIA PACIFIC: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 78 ASIA PACIFIC: MEAT STARTER CULTURES MARKET SIZE FOR SAUSAGES, BY COUNTRY/REGION, 2018–2025 (USD THOUSAND)

TABLE 79 ASIA PACIFIC: MEAT STARTER CULTURES MARKET SIZE FOR SALAMI, BY COUNTRY/REGION, 2018–2025 (USD THOUSAND)

TABLE 80 ASIA PACIFIC: MEAT STARTER CULTURES MARKET SIZE FOR DRY-CURED MEAT, BY COUNTRY/REGION, 2018–2025 (USD THOUSAND)

TABLE 81 ASIA PACIFIC: MEAT STARTER CULTURES MARKET SIZE FOR OTHER APPLICATIONS, BY COUNTRY/REGION, 2018–2025 (USD THOUSAND)



TABLE 82 ASIA PACIFIC: MEAT STARTER CULTURES MARKET SIZE, BY MICROORGANISM, 2018–2025 (USD MILLION)

TABLE 83 ASIA PACIFIC: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

TABLE 84 ASIA PACIFIC: MULTI-STRAIN MEAT STARTER CULTURES MIX MARKET SIZE, BY COUNTRY/REGION, 2018–2025 (USD THOUSAND)

TABLE 85 ASIA PACIFIC: SINGLE-STRAIN MEAT STARTER CULTURES MARKET SIZE, BY COUNTRY, 2018–2025 (USD THOUSAND)

TABLE 86 ASIA PACIFIC: MULTI-STRAIN MEAT STARTER CULTURES MARKET SIZE, BY COUNTRY/REGION, 2018–2025 (USD THOUSAND)

#### 10.5.1 CHINA

10.5.1.1 Consumers are switching toward processed meat products due to various disease outbreak

TABLE 87 CHINA: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 88 CHINA: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

#### 10.5.2 INDIA

10.5.2.1 Erosion of various traditional culinary habits and adoption of consuming health benefit products gave rise to the consumption of processed meat products

TABLE 89 INDIA: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 90 INDIA: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

#### 10.5.3 AUSTRALIA & NEW ZEALAND

10.5.3.1 Meat products make an excellent addition to the diet of people

TABLE 91 AUSTRALIA & NEW ZEALAND: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 92 AUSTRALIA & NEW ZEALAND: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

#### 10.5.4 JAPAN

10.5.4.1 Consumers are inclined toward meat intake to maintain health

TABLE 93 JAPAN: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 94 JAPAN: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

#### 10.5.5 REST OF ASIA PACIFIC

10.5.5.1 Invest in various meat processing techniques to provide better, safety and quality processed meat products

TABLE 95 REST OF ASIA PACIFIC: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 96 REST OF ASIA PACIFIC: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

10.6 REST OF THE WORLD (ROW)

TABLE 97 ROW: MEAT STARTER CULTURES MARKET SIZE, BY REGION, 2018–2025 (USD MILLION)

TABLE 98 ROW: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 99 ROW: MEAT STARTER CULTURES MARKET SIZE FOR SAUSAGES, BY REGION, 2018–2025 (USD THOUSAND)

TABLE 100 ROW: MEAT STARTER CULTURES MARKET SIZE FOR SALAMI, BY REGION, 2018–2025 (USD THOUSAND)

TABLE 101 ROW: MEAT STARTER CULTURES MARKET SIZE FOR DRY-CURED MEAT, BY REGION, 2018–2025 (USD THOUSAND)

TABLE 102 ROW: MEAT STARTER CULTURES MARKET SIZE FOR OTHER APPLICATIONS, BY REGION, 2018–2025 (USD THOUSAND)

TABLE 103 ROW: MEAT STARTER CULTURES MARKET SIZE, BY MICROORGANISM, 2018–2025 (USD MILLION)

TABLE 104 ROW: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

TABLE 105 ROW: MULTI-STRAIN MIX MARKET SIZE, BY REGION, 2018–2025 (USD THOUSAND)

TABLE 106 ROW: SINGLE-STRAIN MARKET SIZE, BY REGION, 2018–2025 (USD THOUSAND)

TABLE 107 ROW: MULTI-STRAIN MARKET SIZE, BY REGION, 2018–2025 (USD THOUSAND)

#### 10.6.1 SOUTH AMERICA

10.6.1.1 Brazil's meat industry might positively impact the meat starter cultures market in the region

TABLE 108 SOUTH AMERICA: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 109 SOUTH AMERICA: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

#### 10.6.2 MIDDLE EAST

10.6.2.1 Manufacturers are more focused on naturally derived additives in various processed meat products

TABLE 110 MIDDLE EAST: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)



TABLE 111 MIDDLE EAST: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

#### 10.6.3 AFRICA

10.6.3.1 Sluggish economic & technological developments restrain demand meat starter cultures in the region

TABLE 112 AFRICA: MEAT STARTER CULTURES MARKET SIZE, BY APPLICATION, 2018–2025 (USD THOUSAND)

TABLE 113 AFRICA: MEAT STARTER CULTURES MARKET SIZE, BY COMPOSITION, 2018–2025 (USD THOUSAND)

## 11 COMPETITIVE LANDSCAPE

### 11.1 OVERVIEW

### 11.2 MARKET EVALUATION FRAMEWORK

FIGURE 38 MARKET EVALUATION FRAMEWORK, 2017–2020

### 11.3 MARKET SHARE ANALYSIS, 2019

FIGURE 39 MARKET SHARE ANALYSIS OF MAJOR MARKET PLAYERS, 2019

### 11.4 REVENUE ANALYSIS OF MAJOR MARKET PLAYERS

FIGURE 40 REVENUE ANALYSIS OF MAJOR MARKET PLAYERS, 2015–2019 (USD BILLION)

### 11.5 COMPETITIVE SCENARIO

#### 11.5.1 EXPANSIONS & INVESTMENTS

TABLE 114 EXPANSIONS & INVESTMENTS, 2018

#### 11.5.2 NEW PRODUCT LAUNCHES

TABLE 115 NEW PRODUCT LAUNCHES, 2019

## 12 COMPANY EVALUATION MATRIX & COMPANY PROFILES

### 12.1 OVERVIEW

### 12.2 COMPANY EVALUATION MATRIX: DEFINITIONS & METHODOLOGY

#### 12.2.1 STARS

#### 12.2.2 EMERGING LEADERS

#### 12.2.3 PERVASIVE PLAYERS

#### 12.2.4 EMERGING COMPANIES

### 12.3 COMPANY EVALUATION MATRIX, 2019 (OVERALL MARKET)

FIGURE 41 GLOBAL MEAT STARTER CULTURES MARKET COMPANY EVALUATION MATRIX, 2019 (OVERALL MARKET)

## 13 COMPANY PROFILES

(Business overview, Products offered, Recent Developments, SWOT analysis, MNM view)\*

#### 13.1 CHR. HANSEN

FIGURE 42 CHR. HANSEN: COMPANY SNAPSHOT

#### 13.2 DUPONT

FIGURE 43 DUPONT: COMPANY SNAPSHOT

#### 13.3 DSM

FIGURE 44 DSM: COMPANY SNAPSHOT

#### 13.4 KERRY GROUP

FIGURE 45 KERRY GROUP: COMPANY SNAPSHOT

#### 13.5 IFF

FIGURE 46 IFF: COMPANY SNAPSHOT

#### 13.6 GALACTIC

#### 13.7 LALLEMAND

#### 13.8 BIOCHEM SRL

#### 13.9 PROQUIGA BIOTECH

#### 13.10 WESTCOMBE

#### 13.11 RAPS GMBH

\*Details on Business overview, Products offered, Recent Developments, SWOT analysis, MNM view might not be captured in case of unlisted companies.

#### 13.12 COMPETITIVE LEADERSHIP MAPPING (START-UP/SME)

##### 13.12.1 PROGRESSIVE COMPANIES

##### 13.12.2 STARTING BLOCKS

##### 13.12.3 RESPONSIVE COMPANIES

##### 13.12.4 DYNAMIC COMPANIES

FIGURE 47 MEAT STARTER CULTURES MARKET COMPETITIVE LEADERSHIP MAPPING FOR START-UPS/SMES, 2019

(Business overview, Products offered, Recent Developments, SWOT analysis, MNM view)\*

#### 13.13 GENESIS LABORATORIES LTD

#### 13.14 THT PROBIOTICS AND STARTER CULTURES

#### 13.15 CODEX-ING BIOTECH INGREDIENTS

#### 13.16 SACCO SYSTEM

#### 13.17 CANADA COMPOUND

#### 13.18 BIOVITEC

#### 13.19 STUFFERS SUPPLY COMPANY

#### 13.20 MEAT CRACKS

#### 13.21 DNR SAUSAGES SUPPLIES

### 13.22 MICROTEC GMBH

Details on Business overview, Products offered, Recent Developments, SWOT analysis, MNM view might not be captured in case of unlisted companies.

## **14 APPENDIX**

### 14.1 DISCUSSION GUIDE

### 14.2 KNOWLEDGE STORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

### 14.3 AVAILABLE CUSTOMIZATIONS

### 14.4 RELATED REPORTS

### 14.5 AUTHOR DETAILS

## I would like to order

Product name: Meat Starter Cultures Market by Application (Sausages, Salami, Dry-cured meat, and Others), Microorganism(Bacteria, and Fungi), Composition (Multi-strain mix, Single strain, and Multi-strain), Form, and Region - Global Forecast to 2025

Product link: <https://marketpublishers.com/r/MF3D26B47627EN.html>

Price: US\$ 4,950.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/MF3D26B47627EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:

Last name:

Email:

Company:

Address:

City:

Zip code:

Country:

Tel:

Fax:

Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below

and fax the completed form to +44 20 7900 3970