

# Non-meat Ingredients Market by End-Use Applications (Fresh Meat, Processed and Cured Meats, Marinated, Ready-To-Eat Meat Products, Frozen Meat Products, and Convenience Food), Ingredient Type, Ingredient Source, Form and Region - Global Forecast to 2029

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## Abstracts

The global non-meat ingredients market is estimated to be valued at USD 41.2 billion in 2024 and is projected to reach USD 51.1 billion by 2029, at a CAGR of 4.4%. The globalization of culinary tastes, driven by factors such as increased travel, migration, and the pervasive influence of social media, has significantly impacted the worldwide demand for meat products and, consequently, the non-meat ingredients market. In countries such as India and China, traditionally vegetarian-leaning diets have witnessed a surge in the consumption of meat products such as patties, sausages, nuggets, bacon, and meatballs due to the infiltration of Western fast-food culture. For instance, as per a news article by HT Digital Streams Ltd, Burger was the most ordered food item on the ONDC (Open Network for Digital Commerce) platform in India in 2023.

Likewise, in Western countries, there's a growing fascination with Asian cuisines, leading to an increased consumption of dishes like sushi, stir-fries, and curries. Social media platforms play a pivotal role in this cultural exchange by showcasing diverse culinary experiences, enticing individuals to explore and experiment with different cuisines. As consumers become more adventurous in their food choices, the demand for non-meat ingredients has increased rapidly. These ingredients play a crucial role in enhancing the flavor, texture, and overall quality of processed meat products. Flavoring agents, salt, preservatives, coloring agents, binders, fillers, extenders, and texturizing agents are meticulously selected and combined to achieve the desired characteristics of meat products, meeting the evolving preferences of a globalized palate.

“During the forecast period, the chemical substances within the ingredient source segment is anticipated to hold a dominant position in the non-meat ingredients market.”

Chemical substances offer precise control over flavor, texture, and appearance, ensuring consistency in the final product, which is crucial for processed meat manufacturers. Additionally, chemical substances often provide cost-effective solutions compared to natural sources, making them a preferred choice for large-scale production. Compared to plant and animal-derived ingredients, chemical substances offer greater versatility and stability. Plant-derived ingredients may have limited availability, seasonality, and variability in quality, while animal-derived ingredients may pose ethical and cultural concerns. Chemical substances mitigate these challenges by providing consistent performance regardless of external factors.

Moreover, chemical substances can mimic the functionalities of natural ingredients while offering advantages such as longer shelf life and enhanced safety through the control of microbial growth. This is particularly relevant in the meat industry where food safety is paramount. Chemical substances also provide a wider range of options for product innovation, enabling manufacturers to meet diverse consumer preferences and dietary restrictions. Overall, the dominance of chemical substances in the non-meat ingredients market is attributed to their precision, cost-effectiveness, safety, versatility, and ability to overcome limitations associated with natural sources, making them indispensable for the processed meat industry.

“High meat consumption and fast-food culture have positioned the US in North America region as one of the dominant market in the non-meat ingredients market.”

With Americans increasingly opting for ready-to-eat and frozen foods due to their hectic schedules, the demand for processed meat products has soared. According to statistics from a survey conducted by the National Center for Health Statistics, approximately 36.6% of adults in America consume fast food on any given day, totaling about 84.8 million adults. This frequent consumption underscores the reliance on convenient food options, including processed meat products, which often incorporate non-meat ingredients for flavor enhancement, preservation, texture improvement, and other desirable properties.

The prevalence of large fast-food chains further drives the demand for processed meat products in the US market. These chains consistently offer a variety of meat-based items that are quick to prepare and serve, thus necessitating the use of non-meat

ingredients to meet consumer expectations for taste, texture, and consistency. Additionally, the US's significant meat production, consumption, and export volumes create a robust infrastructure for the procurement and distribution of non-meat ingredients, further solidifying its position as a leader in the non-meat ingredients market within North America.

The break-up of the profile of primary participants in the non-meat ingredients market:

By Company Type: Tier 1 – 23%, Tier 2 – 30%, and Tier 3 – 47%

By Designation: CXO's – 24%, Managers – 36%, Executives- 40%

By Region: North America – 20%, Europe – 25%, Asia Pacific – 45%, South America – 5%, and Rest of the World –5%

Prominent companies Kerry Group plc. (Ireland), Ingredion (US), Associated British Foods plc (UK), International Flavors & Fragrances Inc. (US), ADM (US), Cargill, Incorporated (US), BASF SE (Germany), and DSM (Netherlands) among others.

Research Coverage:

This research report categorizes the non-meat ingredients market by end-use applications (fresh meat, processed and cured meats, marinated and seasoned meats, ready-to-eat meat products, frozen meat products, and convenience foods), ingredient type (binders, fillers, extenders, flavoring agents, coloring agents, preservatives, salt, and texturizing agents), ingredient source (chemical substances, animal origin, and plant origin), form (liquid and solid), 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 non-meat ingredients 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 non-meat ingredients 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 non-meat ingredients 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 (Rising consumption of convenience foods), restraints (Rise in environmental and animal concerns), opportunities (Increased demand for fast-food chains), and challenges (Cost competitiveness) influencing the growth of the non-meat ingredients market.

**Product Development/Innovation:** Detailed insights on upcoming technologies, research & development activities, and new product launches in the non-meat ingredients market.

**Market Development:** Comprehensive information about lucrative markets – the report analyses the non-meat ingredients market across varied regions.

**Market Diversification:** Exhaustive information about new products, untapped geographies, recent developments, and investments in the non-meat ingredients market.

**Competitive Assessment:** In-depth assessment of market shares, growth strategies, and product offerings of leading players such as Kerry Group plc. (Ireland), Ingredion (US), Associated British Foods plc (UK), International Flavors & Fragrances Inc. (US), ADM (US), Cargill, Incorporated (US), BASF SE (Germany), and DSM (Netherlands) among others in the non-meat ingredients market strategies. The report also helps stakeholders understand the non-meat ingredients market and provides them with information on key market drivers, restraints, challenges, and opportunities.

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