

Clean Label Ingredient - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Clean Label Ingredient Market size is estimated at USD 42.76 billion in 2024, and is expected to reach USD 62.12 billion by 2029, growing at a CAGR of 6.51% during the forecast period (2024-2029).

Consumers demand clean labels on products to learn more about the product and the type of ingredients used before consumption. This interest in identifying the ingredients present in food and beverage products has triggered the growth of the clean label ingredients market. The growing demand for transparent and natural ingredients targeted at children has increasingly pushed parents to prefer clean label ingredient-based foods. Thus, companies are producing kids-specific product ranges to cater to such demand. For instance, Honest Organic Kids offers Apple Fruit Juice Drink with claims like no added sugar, no colors, no sweeteners, and no preservatives.

In addition, a growing preference for vegan nutrition and inclination toward vegan diets are registering rising prominence in countries like Germany, increasing demand for plant-based and vegan ingredients in the market, thus boosting demand for clean label ingredients. According to the USDA Foreign Agriculture Services, Germany has the highest rate of vegetarianism compared to its European neighbors, and the number of vegans reached over 1.5 million in 2022. Furthermore, stringent government regulations are leading to the adoption of safer, natural alternatives for all food categories worldwide. This has created new opportunities for food ingredient manufacturers to offer clean label ingredients. For instance, in the United Kingdom, the 'free-from' claims are regulated by the provisions of the General Food Law (Regulation (EC) No. 178/2002), while rules relating to gluten are regulated by Regulation (EU) No. 1169/2011.

Clean Label Ingredient Market Trends

Increasing Health and Wellness Trends Fueling Market Growth

Rising awareness among consumers of the relationship between diet and health has made them more conscious of the ingredients present in their food. Many consumers are taking proactive steps to improve their health and well-being through informed decisions about the foods they consume. These include avoiding artificial additives, preservatives, and synthetic chemicals often found in processed foods and opting for cleaner, more natural alternatives. As per the International Food Information Council, in 2023, nearly 26% of respondents in the United States said that the term "Natural" best defines healthy food to them. In addition, the term "Non-GMO" saw a 14% response rate.

Consumers are increasingly seeking transparency regarding the ingredients used in food products. They want clear and comprehensive ingredient lists that are easy to understand and free from ambiguous or misleading terms. Clean label ingredients, which have simpler and more recognizable names, resonate with consumers who value transparency and authenticity. For instance, according to Twilio Inc., a San Francisco-based cloud communications company, during a 2022 survey carried out among consumers worldwide who purchased something online in the past six months, 60% stated that they consider trustworthiness and transparency to be the most important traits of a brand, dominating over all other traits.

Moreover, food allergies are becoming increasingly common, affecting millions of people worldwide. As a result, there is heightened awareness and concern about allergens in the food supply. This, in turn, has propelled the demand for allergen-free and clean label products.

North America Holds the Largest Market Share

The clean label streamlines the ingredient list by using natural ingredients while ignoring artificial additives, preservatives, and other chemical substances. Increasing awareness about health has led consumers to seek products with simpler, more natural ingredients. Clean label ingredients, which essentially comprise ingredients that are minimally processed and free from artificial additives, align with the health-conscious trend among consumers in North America. Clean label ingredients provide transparency as they are

easily recognizable and familiar to consumers, fostering trust in the company's food and beverage products.

Further, there is a growing preference for natural and organic food and beverages among consumers who prioritize sustainability, environmental stewardship, and ethical sourcing. Clean label ingredients, often sourced from natural or organic sources, meet these demands. As per the Organic Trade Association, organic food sales in the United States amounted to USD 57.5 billion in 2021, which increased to USD 61.67 billion in 2022. Thus, the rising demand for organic food and beverage products has boosted the growth of clean label food ingredients in the country.

In addition, the demand for clean label ingredients is fueled by consumer concerns regarding the potential health risks associated with artificial additives. As per the Public Health Agency of Canada, the most prevalent chronic disease conditions in 2022 included being overweight (35.5%), obesity (29.2%), arthritis (19.5%), and high blood pressure (17.7%). Thus, consumers are becoming more conscious about their intake, which has led to increased demand for clean label food and food ingredients in the country.

Clean Label Ingredient Industry Overview

The clean label ingredients market is highly competitive in nature due to the presence of several local, domestic, and global players. Due to the presence of several players in the clean label ingredients market, the rivalry among the competitors is also high. Leading players, like Cargill Inc., International Flavors and Fragrances Inc., Ingredion Inc., DSM-Firmenich, and Archer Daniel Midlands Company, account for a significant market share globally. Cargill Inc. dominates the market with a significantly high market share. The larger players are increasing their R&D investments, partnering with other firms, and expanding their business to maintain their position and share in the market studied. For instance, in June 2022, Givaudan, in partnership with US-based Manus Bio (biomanufacturer of natural products), launched a sustainable, natural, clean label citrus flavor ingredient called BioNootkatone. The company claims that BioNootkatone provides a refreshing, natural citrus taste that can be used in various food and beverage applications.

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