

Carrageenan Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Processing Technology (Semi-refined, Gel Press, Alcohol Precipitation), By Function (Thickening Agent, Gelling Agent, Stabilizer, Others), By End Use (Food & Beverage, Pharmaceutical, Personal Care & Cosmetics, Others), By Region, By Competition, 2018-2028

<https://marketpublishers.com/r/C3D483827133EN.html>

Date: November 2023

Pages: 182

Price: US\$ 4,900.00 (Single User License)

ID: C3D483827133EN

Abstracts

Global Carrageenan Market was valued at USD 875.5 Million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 5.3% through 2028. Over the course of the projection period, the market is predicted to develop as a result of increased product penetration in dairy and processed meat products due to carrageenan's ability to mimic the mouthfeel of fatty foods. Carrageenan's capacity to bond with water and improve the characteristics of food ingredients is the main reason it is used so widely in the food business. Gelatin and other substances originating from animals, such as gelatin, are becoming less popular in food and medicinal items, which is anticipated to boost demand for the goods.

In the North American market, the U.S. contributed the greatest proportion of revenues in 2022. Due to the country's extensive food manufacturing infrastructure and developed market for processed food items, this substance is in high demand as an additive for use as a thickening and gelling agent in food processing.

Due to the product's ability to bind water, it is mostly used as a viscosity control ingredient in personal care products and water-based cosmetics. It works in body

cleansers, lotions, and sunscreens as a thickening, stabilising, and suspending ingredient. For example, the Natural Moisturising Lubricant of Dream Brands Inc. and L'Oréal's Pure-clay Glow-mask both include carrageenan. Positive socioeconomic progress has resulted in coastal nations from the cultivation of the commodity.

Due to the favorable climatic circumstances, carrageenan cultivation and processing are expanding throughout Asia Pacific, especially in Southeast Asian nations. Because the processes are considerably simpler, and the processing costs are lower, small and medium-sized businesses in these nations frequently adopt semi-refined type processing technologies. Product differentiation in this sector is influenced by the extraction methods used and the raw materials used. Lambda is mostly utilised as a thickening agent because it lacks the ability to form a gel, whereas kappa and iota kinds can be used as gelling agents. For instance, Cargill, Incorporated has developed Satiagel ADG 0220 Seabird carrageenan that can be used for gelled dairy desserts. The company has further diversified the product range by developing Seabird carrageenan, which can be utilized for creamy dairy desserts as a texturizing agent.

Key Market Drivers

Growing Demand for Processed and Convenience Foods

The carrageenan market is significantly influenced by the increasing global demand for processed and convenience foods. This driver is one of the primary factors contributing to the growth of the carrageenan industry. The modern lifestyle is characterized by busy schedules, urbanization, and changing dietary preferences. As a result, consumers are increasingly turning to processed and ready-to-eat foods due to their convenience and time-saving benefits. This shift in consumer behavior has driven the demand for a wide range of processed foods, including dairy products, meat products, and convenience snacks, all of which often contain carrageenan as an essential ingredient. In today's fast-paced world, many consumers have limited time for meal preparation. Processed and convenience foods offer quick and easy meal solutions, making them a popular choice.

The global trend toward urbanization has led to smaller living spaces and reduced kitchen facilities. This has further encouraged the consumption of convenience foods that require minimal cooking and preparation. The global trend toward urbanization has led to smaller living spaces and reduced kitchen facilities. This has further encouraged the consumption of convenience foods that require minimal cooking and preparation. With more households having both partners working, there is a higher demand for convenient food options to accommodate busy schedules. Consumer preferences are

shifting towards foods that are easy to consume on the go, such as snack bars, pre-packaged meals, and microwavable dishes.

Expanding Applications in the Pharmaceutical Industry

In addition to its prevalent use in the food industry, carrageenan has been finding increasing applications in the pharmaceutical sector, serving as a vital driver for the growth of the carrageenan market. The pharmaceutical industry has witnessed significant growth in recent years, driven by factors such as the aging global population, rising healthcare expenditures, and increasing prevalence of chronic diseases. Carrageenan has emerged as a valuable ingredient in various pharmaceutical products and formulations due to its unique properties and versatility. Carrageenan is used in the development of drug delivery systems. Its gelling and thickening properties are leveraged to create controlled-release drug formulations, including tablets, capsules, and gels. This helps improve the efficacy of pharmaceuticals and ensures consistent dosing.

Carrageenan's ability to form gels makes it suitable for topical pharmaceutical applications. It is used in gels, creams, and ointments to enhance the spread ability and stability of active pharmaceutical ingredients (APIs). This is especially important in dermatology and wound care products. Carrageenan is used in oral healthcare products such as toothpaste and mouthwash. It acts as a thickening and stabilizing agent, contributing to the overall product texture and appearance. In biotechnology and research, carrageenan is used for cell culture and tissue engineering due to its biocompatibility. It provides a stable environment for cell growth and can be used as a scaffold material for tissue regeneration. Carrageenan-based nasal sprays and inhalation solutions are used to manage respiratory conditions. Carrageenan's mucosal adhesion properties help retain the active ingredients in the respiratory tract for extended periods, improving their effectiveness.

Rising Demand for Plant-Based and Vegan Products

The global shift towards plant-based and vegan diets is a significant driver propelling the growth of the carrageenan market. As more consumers seek alternatives to traditional animal-based products, carrageenan plays a crucial role in improving the texture and quality of plant-based and vegan food items. Plant-based and vegan diets have gained considerable traction worldwide due to various factors, including ethical concerns about animal welfare, environmental sustainability, and perceived health benefits. Carrageenan is a versatile ingredient that helps replicate the textures and

mouthfeel of animal-based products, making it essential for plant-based and vegan food manufacturers.

Plant-based and vegan diets have gained considerable traction worldwide due to various factors, including ethical concerns about animal welfare, environmental sustainability, and perceived health benefits. Carrageenan is a versatile ingredient that helps replicate the textures and mouthfeel of animal-based products, making it essential for plant-based and vegan food manufacturers. Consumers are increasingly aware of the health benefits associated with plant-based diets, such as reduced risk of chronic diseases and lower environmental impact. This awareness is driving the demand for plant-based alternatives.

Growing concerns about climate change and the environmental impact of animal agriculture have led many individuals to reduce their meat and dairy consumption in favor of plant-based options. Ethical concerns about animal farming practices and animal welfare have motivated people to opt for plant-based and vegan diets. The food industry has responded to the demand for plant-based alternatives by developing a wide range of products, from plant-based meats and dairy substitutes to vegan snacks and desserts.

Key Market Challenges

Regulatory Concerns and Safety Issues

One of the primary challenges that the carrageenan market faces is regulatory concerns and safety issues associated with this ingredient. Over the years, carrageenan has been the subject of debates and discussions regarding its safety for consumption, particularly in the food industry. Carrageenan is derived from red seaweed and has been used as a food additive for decades due to its gelling, thickening, and stabilizing properties. However, concerns about the safety of carrageenan emerged as some studies suggested potential links to digestive issues, inflammation, and even carcinogenicity, particularly in animal studies.

Some studies, particularly those involving degraded or 'low molecular weight' carrageenan, have raised concerns about its impact on the gastrointestinal tract, potentially leading to inflammation and digestive discomfort in sensitive individuals. The scientific community remains divided on the safety of carrageenan. While some studies have reported adverse effects, others have found no significant issues with its consumption. Regulatory agencies, such as the U.S. Food and Drug Administration

(FDA), have evaluated the safety of carrageenan and established guidelines for its use in food products. However, regulatory scrutiny can lead to uncertainty in the market.

The regulatory concerns and safety issues surrounding carrageenan present a significant challenge to the carrageenan market. While there is ongoing research to address these concerns, the industry must navigate the complex landscape of safety evaluations, regulatory compliance, and consumer perception.

Growing Competition from Alternative Ingredients

The carrageenan market faces increasing competition from alternative ingredients that offer similar texturizing and stabilizing properties. This competition arises from consumer preferences for clean label and natural ingredients, as well as concerns about the safety of carrageenan. In response to consumer demand for clean label and natural products, food manufacturers are exploring alternative ingredients that can replace carrageenan while maintaining product quality and stability. These alternatives may include gums, starches, and other hydrocolloids. The clean label movement emphasizes the use of simple, recognizable ingredients. Carrageenan, being a processed extract from seaweed, doesn't always align with this trend. Concerns about the safety of carrageenan have led some consumers to seek products with alternative texturizing and stabilizing agents. Reformulating products to replace carrageenan can be complex and may require adjustments to achieve the desired product characteristics. The increasing competition from alternative ingredients represents a challenge for the carrageenan market, particularly as consumers and food manufacturers prioritize clean label products. To address this challenge, the carrageenan industry is focused on innovation, reformulation, and educational efforts to highlight the benefits of carrageenan.

Key Market Trends

Clean Label and Natural Ingredients

The first significant trend in the carrageenan market is the increasing demand for clean label and natural ingredients. Consumers are increasingly concerned about the ingredients in their food, with a preference for simple and recognizable components. This trend stems from a growing awareness of the health implications of food additives and a desire for greater transparency in food products. Clean label products are those with minimal or no artificial additives, preservatives, or synthetic chemicals. Carrageenan, as a processed extract from seaweed, may not always align with this

clean label and natural food movement.

In response to this trend, the food industry is reformulating products to remove or replace additives like carrageenan with more natural alternatives. There is a growing interest in plant-based emulsifiers and stabilizers, such as pectin and agar, as alternatives to carrageenan. The impact on the carrageenan market is significant, as manufacturers adapt to meet consumer demands for cleaner ingredient lists and greater transparency. Carrageenan producers are exploring ways to modify processing methods to meet clean label criteria, ensuring the ingredient remains relevant in a market increasingly focused on natural and simple ingredients.

Plant-Based and Vegan Product Innovation

The second major trend in the carrageenan market is the rapid growth of plant-based and vegan product innovation. This trend is driven by various factors, including health consciousness, environmental concerns, and ethical considerations. Consumers are increasingly looking for alternatives to traditional animal-based products, and carrageenan is playing a pivotal role in this transition. Carrageenan helps create plant-based products that closely resemble their animal-based counterparts, improving texture and mouthfeel.

Plant-based dairy alternatives, including milk, yogurt, and cheese, often contain carrageenan to replicate the creamy texture and stability of dairy products. Plant-based meat products, such as burgers, sausages, and chicken nuggets, also rely on carrageenan to achieve desired juiciness and texture. Vegan desserts, including ice cream, pudding, and mousse, benefit from carrageenan's ability to enhance texture and creaminess. The impact on the carrageenan market is significant, as it expands the ingredient's applications and consumer base. Carrageenan bridges the gap between plant-based offerings and traditional dairy and meat products, supporting the growth of the plant-based and vegan sector.

Health and Wellness Products

The third prominent trend in the carrageenan market is the rising demand for health and wellness products. Consumers are increasingly seeking foods and supplements that offer functional benefits and promote overall well-being. This trend aligns with the broader movement toward healthier eating habits and lifestyles. Health and wellness products encompass a wide range of categories, including functional foods and beverages, dietary supplements, and products focused on specific health concerns.

Carrageenan's role in this trend includes enriching dietary fiber content in products like fiber bars, supplements, and meal replacements. Carrageenan is also used in prebiotic foods to support gut health and in protein drinks to improve texture and stability while enhancing protein content. Nutritional gummies, a popular format for dietary supplements and vitamins, benefit from carrageenan's ability to create appealing textures and flavors. The impact on the carrageenan market is notable, as the trend towards health and wellness presents opportunities for manufacturers to develop and market products that align with consumer desires for functional foods and supplements. Carrageenan's functional properties make it a valuable ingredient in this space, supporting the growth of the health and wellness sector.

Segmental Insights

Processing Technology Insights

With the leading market share in terms of sales, semi-refined technology prevailed in 2022. Since a semi-refined procedure is economical, it finds favor with consumers. SRC, or semi-refined carrageenan, contains cellulose and other insoluble materials. The development of food-grade semi-refined carrageenan as a result of technological advancement has increased its use in food items and consequently increased demand for it. Semi-refined carrageenan has been found to be safe for human consumption in the vast majority of nations on earth and can therefore be used in food applications.

Carrageenan is usually extracted from seaweed via alcohol precipitation, which results in a more refined and purer product. However, the alcohol precipitation method requires numerous steps, which raises the cost of overall processing and is anticipated to impede segment expansion. Due to the fact that only certain types of seaweed, can be processed using the gel press, it is primarily employed to create kappa-type carrageenan.

Function Insights

The thickening agent segment held the largest revenue share in 2022. This can be attributed to the rising demand for clean-label thickeners in the food and pharmaceutical industry. The gelling agent segment held a significant revenue share in 2022 owing to the increasing demand for plant-derived gelling additives that can be readily used in vegan products. The stabilizer segment is expected to grow rapidly with a surge in demand from the bakery, confectionery, and beverage applications. Stabilizers are used

to prevent the formation of undesirable ice crystals and improve the texture properties of the product. For instance, a carrageenan stabilizer can improve the mouthfeel of beverages, such as kombucha and coconut water.

Regional Insights

The Asia-Pacific region substantially dominates the world market for carrageenan due to the plentiful supply in countries like the Philippines, China, and India. Several businesses, including food, medicine, and cosmetics, have included carrageenan in their products. One of the main factors contributing to China's leading market share is the country's higher use of carrageenan in meat, jellies, and other items. India uses a lot of carrageenan as a result of its expanding food manufacturing sector. The product is produced in coastal countries, where it has resulted in positive socioeconomic development. Carrageenan cultivation and processing are expanding across the Asia-Pacific area, notably in Southeast Asian countries, as a result of favorable climatic circumstances.

Owing to comparably simpler procedures and cheaper processing costs, small and medium-sized companies frequently adopt semi-refined processing in these nations. The carrageenan market in Asia-Pacific is expected to expand at a faster pace with a high growth rate in terms of revenue within the forecast period. With existing major players, especially in the food industry in developing countries, like Marcel Carrageenan and J.M. Huber Corporation Ltd., there is substantial growth in the entire food and beverage industry, which is fueling demand for the product and boosting the market.

Key Market Players

TBK Manufacturing Corporation

Ingredion Incorporated

Marcel Carrageenan

CP Kelco U.S., Inc.

Cargill, Inc.

W Hydrocolloids, Inc.

J.M. Huber Corporation

Caldic B.V.

Ina Food Industry Co. Ltd.

ACCEL Carrageenan Corporation

Report Scope:

In this report, the Global Carrageenan Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Carrageenan Market, By Processing Technology:

Semi-refined

Gel Press

Alcohol Precipitation

Carrageenan Market, By Function:

Thickening Agent

Gelling Agent

Stabilizer

Others

Carrageenan Market, By End Use:

Food & Beverage

Pharmaceutical,

Personal Care & Cosmetics

Others

Carrageenan Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Carrageenan Market.

Available Customizations:

Global Carrageenan market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. INTRODUCTION

- 1.1. Product Overview
- 1.2. Key Highlights of the Report
- 1.3. Market Coverage
- 1.4. Market Segments Covered
- 1.5. Research Tenure Considered

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Market Overview
- 3.2. Market Forecast
- 3.3. Key Regions
- 3.4. Key Segments

4. VOICE OF CUSTOMER

- 4.1. Brand Awareness
- 4.2. Factors Influencing Purchase Decisions
- 4.3. Challenges Faced

5. GLOBAL CARRAGEENAN MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Processing Technology Market Share Analysis (Semi-refined, Gel Press,

Alcohol Precipitation)

5.2.2. By Function Market Share Analysis (Thickening Agent, Gelling Agent, Stabilizer, Others)

5.2.3. By End Use Market Share Analysis (Food & Beverage, Pharmaceutical, Personal Care & Cosmetics, Others)

5.2.4. By Regional Market Share Analysis

5.2.4.1. North America Market Share Analysis

5.2.4.2. South America Market Share Analysis

5.2.4.3. Middle East & Africa Market Share Analysis

5.2.4.4. Europe Market Share Analysis

5.2.4.5. Asia-Pacific Market Share Analysis

5.2.5. By Top 5 Companies Market Share Analysis, Others (2022)

5.3. Global Carrageenan Market Mapping & Opportunity Assessment

5.3.1. By Processing Technology Market Mapping & Opportunity Assessment

5.3.2. By Function Market Mapping & Opportunity Assessment

5.3.3. By End Use Market Mapping & Opportunity Assessment

5.3.4. By Region Channel Market Mapping & Opportunity Assessment

6. NORTH AMERICA CARRAGEENAN MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Processing Technology Market Share Analysis

6.2.2. By Function Market Share Analysis

6.2.3. By End Use Market Share Analysis

6.3. North America: Country Analysis

6.3.1. United States Carrageenan Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Processing Technology Market Share Analysis

6.3.1.2.2. By Function Market Share Analysis

6.3.1.2.3. By End Use Market Share Analysis

6.3.2. Canada Carrageenan Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Processing Technology Market Share Analysis

- 6.3.2.2.2. By Function Market Share Analysis
- 6.3.2.2.3. By End Use Market Share Analysis
- 6.3.3. Mexico Carrageenan Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Processing Technology Market Share Analysis
 - 6.3.3.2.2. By Function Market Share Analysis
 - 6.3.3.2.3. By End Use Market Share Analysis

7. EUROPE CARRAGEENAN MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Processing Technology Market Share Analysis
 - 7.2.2. By Function Market Share Analysis
 - 7.2.3. By End Use Market Share Analysis
- 7.3. Europe: Country Analysis
 - 7.3.1. Germany Carrageenan Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Processing Technology Market Share Analysis
 - 7.3.1.2.2. By Function Market Share Analysis
 - 7.3.1.2.3. By End Use Market Share Analysis
 - 7.3.2. United Kingdom Carrageenan Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Processing Technology Market Share Analysis
 - 7.3.2.2.2. By Function Market Share Analysis
 - 7.3.2.2.3. By End Use Market Share Analysis
 - 7.3.3. Italy Carrageenan Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Processing Technology Market Share Analysis
 - 7.3.3.2.2. By Function Market Share Analysis

- 7.3.3.2.3. By End Use Market Share Analysis
- 7.3.4. France Carrageenan Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Processing Technology Market Share Analysis
 - 7.3.4.2.2. By Function Market Share Analysis
 - 7.3.4.2.3. By End Use Market Share Analysis
- 7.3.5. Spain Carrageenan Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Processing Technology Market Share Analysis
 - 7.3.5.2.2. By Function Market Share Analysis
 - 7.3.5.2.3. By End Use Market Share Analysis

8. ASIA-PACIFIC CARRAGEENAN MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Processing Technology Market Share Analysis
 - 8.2.2. By Function Market Share Analysis
 - 8.2.3. By End Use Market Share Analysis
- 8.3. Asia-Pacific: Country Analysis
 - 8.3.1. China Carrageenan Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Processing Technology Market Share Analysis
 - 8.3.1.2.2. By Function Market Share Analysis
 - 8.3.1.2.3. By End Use Market Share Analysis
 - 8.3.2. India Carrageenan Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Processing Technology Market Share Analysis
 - 8.3.2.2.2. By Function Market Share Analysis
 - 8.3.2.2.3. By End Use Market Share Analysis

- 8.3.3. Japan Carrageenan Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Processing Technology Market Share Analysis
 - 8.3.3.2.2. By Function Market Share Analysis
 - 8.3.3.2.3. By End Use Market Share Analysis
- 8.3.4. South Korea Carrageenan Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Processing Technology Market Share Analysis
 - 8.3.4.2.2. By Function Market Share Analysis
 - 8.3.4.2.3. By End Use Market Share Analysis
- 8.3.5. Australia Carrageenan Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Processing Technology Market Share Analysis
 - 8.3.5.2.2. By Function Market Share Analysis
 - 8.3.5.2.3. By End Use Market Share Analysis

9. SOUTH AMERICA CARRAGEENAN MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Processing Technology Market Share Analysis
 - 9.2.2. By Function Market Share Analysis
 - 9.2.3. By End Use Market Share Analysis
- 9.3. South America: Country Analysis
 - 9.3.1. Brazil Carrageenan Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Processing Technology Market Share Analysis
 - 9.3.1.2.2. By Function Market Share Analysis
 - 9.3.1.2.3. By End Use Market Share Analysis
 - 9.3.2. Argentina Carrageenan Market Outlook

- 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
- 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Processing Technology Market Share Analysis
 - 9.3.2.2.2. By Function Market Share Analysis
 - 9.3.2.2.3. By End Use Market Share Analysis
- 9.3.3. Colombia Carrageenan Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Processing Technology Market Share Analysis
 - 9.3.3.2.2. By Function Market Share Analysis
 - 9.3.3.2.3. By End Use Market Share Analysis

10. MIDDLE EAST AND AFRICA CARRAGEENAN MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Processing Technology Market Share Analysis
 - 10.2.2. By Function Market Share Analysis
 - 10.2.3. By End Use Market Share Analysis
- 10.3. MEA: Country Analysis
 - 10.3.1. South Africa Carrageenan Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Processing Technology Market Share Analysis
 - 10.3.1.2.2. By Function Market Share Analysis
 - 10.3.1.2.3. By End Use Market Share Analysis
 - 10.3.2. Saudi Arabia Carrageenan Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Processing Technology Market Share Analysis
 - 10.3.2.2.2. By Function Market Share Analysis
 - 10.3.2.2.3. By End Use Market Share Analysis
 - 10.3.3. UAE Carrageenan Market Outlook
 - 10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Processing Technology Market Share Analysis

10.3.3.2.2. By Function Market Share Analysis

10.3.3.2.3. By End Use Market Share Analysis

11. MARKET DYNAMICS

11.1. Drivers

11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

13. SWOT ANALYSIS

13.1. Strength

13.2. Weakness

13.3. Opportunity

13.4. Threat

14. COMPETITIVE LANDSCAPE

14.1. Company Profiles

14.1.1. TBK Manufacturing Corporation

14.1.1.1. Company Details

14.1.1.2. Products & Services

14.1.1.3. Financials (As Per Availability)

14.1.1.4. Key Market Focus & Geographical Presence

14.1.1.5. Recent Developments

14.1.1.6. Key Management Personnel

14.1.2. Ingredion Incorporated

14.1.2.1. Company Details

14.1.2.2. Products & Services

14.1.2.3. Financials (As Per Availability)

14.1.2.4. Key Market Focus & Geographical Presence

14.1.2.5. Recent Developments

14.1.2.6. Key Management Personnel

14.1.3. Marcel Carrageenan

14.1.3.1. Company Details

- 14.1.3.2. Products & Services
- 14.1.3.3. Financials (As Per Availability)
- 14.1.3.4. Key Market Focus & Geographical Presence
- 14.1.3.5. Recent Developments
- 14.1.3.6. Key Management Personnel
- 14.1.4. CP Kelco U.S., Inc.
 - 14.1.4.1. Company Details
 - 14.1.4.2. Products & Services
 - 14.1.4.3. Financials (As Per Availability)
 - 14.1.4.4. Key Market Focus & Geographical Presence
 - 14.1.4.5. Recent Developments
 - 14.1.4.6. Key Management Personnel
- 14.1.5. Cargill, Inc.
 - 14.1.5.1. Company Details
 - 14.1.5.2. Products & Services
 - 14.1.5.3. Financials (As Per Availability)
 - 14.1.5.4. Key Market Focus & Geographical Presence
 - 14.1.5.5. Recent Developments
 - 14.1.5.6. Key Management Personnel
- 14.1.6. W Hydrocolloids, Inc.
 - 14.1.6.1. Company Details
 - 14.1.6.2. Products & Services
 - 14.1.6.3. Financials (As Per Availability)
 - 14.1.6.4. Key Market Focus & Geographical Presence
 - 14.1.6.5. Recent Developments
 - 14.1.6.6. Key Management Personnel
- 14.1.7. J.M. Huber Corporation
 - 14.1.7.1. Company Details
 - 14.1.7.2. Products & Services
 - 14.1.7.3. Financials (As Per Availability)
 - 14.1.7.4. Key Market Focus & Geographical Presence
 - 14.1.7.5. Recent Developments
 - 14.1.7.6. Key Management Personnel
- 14.1.8. Caldic B.V.
 - 14.1.8.1. Company Details
 - 14.1.8.2. Products & Services
 - 14.1.8.3. Financials (As Per Availability)
 - 14.1.8.4. Key Market Focus & Geographical Presence
 - 14.1.8.5. Recent Developments

- 14.1.8.6. Key Management Personnel
- 14.1.9. Ina Food Industry Co. Ltd.
 - 14.1.9.1. Company Details
 - 14.1.9.2. Products & Services
 - 14.1.9.3. Financials (As Per Availability)
 - 14.1.9.4. Key Market Focus & Geographical Presence
 - 14.1.9.5. Recent Developments
 - 14.1.9.6. Key Management Personnel
- 14.1.10. ACCEL Carrageenan Corporation
 - 14.1.10.1. Company Details
 - 14.1.10.2. Products & Services
 - 14.1.10.3. Financials (As Per Availability)
 - 14.1.10.4. Key Market Focus & Geographical Presence
 - 14.1.10.5. Recent Developments
 - 14.1.10.6. Key Management Personnel

15. STRATEGIC RECOMMENDATIONS

- 15.1. Key Focus Areas
- 15.2. Target Type
- 15.3. Target Distribution Channel

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