

Food Enzymes Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028F By Type (Carbohydrase, Lipase, Protease, Others), By Application (Bakery Products, Beverages, Dairy Products, Others), By Source (Microorganisms, Animals, Plants), By Region, Competition

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Abstracts

The Global Food Enzymes Market was valued at USD 2.45 billion in 2022 and is expected to demonstrate strong growth in the forecast period, with a CAGR of 5.08% through 2028. Enzymes, which are proteins that initiate or enhance biological events, are widely utilized to accelerate and target specific chemical reactions. These enzymes are derived from various sources, including plant and animal extraction or fermentation from microbes, with genetically engineered microorganisms being the most commonly employed method. Food enzymes play a significant role in food processing, offering numerous benefits such as enhancing texture, flavor, aroma, preservation, viscosity, and tenderization. They find extensive application in the baking, fruit juice, cheese-producing, and brewing industries.

Key Market Drivers:

Increasing Demand for High-Quality Food & Beverages:

There has been a notable increase in the demand for high-quality food and beverages worldwide, driven by consumers' desire for enhanced taste and nutritional value. This shift in preference from regular staple food to nutrient-enhanced healthy food products has resulted in a growing demand for enzymes in the food and beverages industry. Food enzymes play a crucial role in various food processing methods, including protein

and starch processing. Additionally, they contribute to the improved processing of raw materials for dairy and alcohol fermentation. The baking sector also heavily relies on the utilization of enzymes. As a result, food enzymes are expected to witness significant adoption in the future due to their wide applicability and high production efficiency.

Rising Awareness About the Benefits of Digestive Enzymes Consumption:

The awareness of the significance of healthy food among consumers worldwide is steadily expanding. This knowledge about nutrition is associated with various factors such as increased development, pollution, health complications, and changing dietary patterns. Moreover, government initiatives to educate rural communities about nutrition, the growing number of working women and qualified individuals, and the time constraints for meal preparation have contributed to the rising demand for nutritious food. Additionally, the increasing population in Asia-Pacific countries, the introduction of new food categories, access to Western products, and the prevalence of nuclear families have further fueled the demand for nutritional food. Each of these contributing factors underscores the necessity for enzymes in the production of nutritional food. Enzyme-based products offer high nutrient levels and aid in food digestion, facilitating the breakdown of food into recombinant proteins, lipids, and carbohydrates to provide nourishment. Furthermore, as the population emphasizes larger food categories and prioritizes health, the demand for nutritionally dense and wholesome food continues to grow. This trend has prompted food manufacturers to incorporate enzymes into their offerings to address the nutritional needs of consumers, thereby driving the growth of the global food enzymes market.

Demand for Natural and Clean Label Products

The increasing preference of consumers for natural and clean label ingredients has driven food manufacturers to use enzymes as a natural alternative to traditional chemical additives. Enzymes are seen as safe, effective, and environmentally friendly, aligning with the growing consumer demand for healthier and more sustainable food products. Enzymes can improve the efficiency of food processing, leading to cost savings for manufacturers. They accelerate reactions, reduce processing time, and enhance product quality, making them attractive options for food producers seeking to optimize their operations.

Increasing Preference for Sustainable Food Products

The growing preference of consumers for natural and clean label ingredients has driven food manufacturers to use enzymes as a natural alternative to traditional chemical additives. Enzymes are seen as safe, effective, and environmentally friendly, aligning with the increasing consumer demand for healthier and more sustainable food products. Enzymes are often used to improve the texture, appearance, and mouthfeel of food products. They can modify the structure of proteins, starches, and fats, leading to better taste and an overall sensory experience for consumers. Thus, people are opting for enzyme-based products, which are expected to drive the global food enzymes market in the forecast years.

Key Market Challenges

Regulatory Uncertainties Pose a Significant Hurdle to Market Expansion

The growing utilization of dietary enzymes as processing components in the food industry has led to the rapid evolution and improvement of safety regulations. Enzymes are categorized as either food additives or food processing aids under food regulations. The classification of food enzymes is of utmost importance as it determines the requirement for pre-market authorization and safety review in certain countries.

Moreover, the variations in elements and chemical additives across nations and regions create regulatory ambiguities that hinder market expansion. For instance, in Canada, the United States, and Japan, all dietary enzymes are regulated as food additives. However, in the European Union (EU) and Australia, most dietary enzymes are classified as processing aids, with only a few categorized as additives.

Enzyme regulations as food processing aids differ significantly among EU member states. These proteins are subject to the licensing procedure in France, Denmark, Poland, and Hungary. In contrast, the UK operates under a unilateral approval system, resulting in geographical disparities. The Asia Pacific region has a diverse regulatory landscape, with each country's food standards being overseen by its respective authority.

The global harmonization of safety regulations concerning food catalysts, particularly food additives, has yet to be achieved. The disjointed and fragmented approach to ingredient regulation is anticipated to have an adverse impact on the expansion of food enzymes in the region's food industry.

Limited Stability & Shelf Life and Cost Concerns

Some enzymes are sensitive to environmental factors such as temperature, pH, and moisture, which can affect their stability and shelf life. Maintaining enzyme stability during storage and transportation can be challenging, especially for certain applications and geographic regions.

The production of food-grade enzymes can be expensive due to the need for specialized facilities, raw materials, and skilled labor. The cost of enzymes might impact their affordability for some food manufacturers, particularly smaller or emerging companies.

Key Market Trends

Increasing Demand for Plant-Based Enzymes

Plant-based enzymes are gaining traction due to their alignment with vegan and vegetarian dietary preferences. As consumers increasingly seek plant-based food options, the demand for enzymes derived from non-animal sources, such as fungi and plants, is on the rise. The demand for clean label and natural food products is also increasing. Consumers are seeking products with fewer artificial additives and chemicals. Enzymes are gaining popularity as natural processing aids and replacements for traditional chemical additives, driving their use in various food applications.

Customized Enzyme Solutions

Enzyme manufacturers are offering customized enzyme solutions to meet the specific needs of food processors. Tailored enzyme formulations could address processing challenges, optimize yields, and enhance the quality of the final food products. With the increasing demand for gluten-free products, enzymes that aid in the breakdown of gluten and improve the texture of gluten-free baked goods are in demand. These enzymes allow the production of gluten-free products with better taste and texture. Moreover, sustainability concerns are influencing enzyme production processes. Enzyme manufacturers are adopting sustainable practices, such as using renewable raw materials, optimizing production processes, and reducing waste.

Segmental Insights

Type Insights

Proteases are enzymes that catalyze the hydrolysis of proteins into smaller peptides and amino acids. In the realm of meat processing, proteases play a crucial role in enhancing the tenderness and texture of meat products. They effectively break down tough connective tissues and proteins, resulting in meat that is not only more tender but also more flavorful. Moreover, proteases contribute significantly to the development of distinct flavors and textures in fermented dairy products such as cheese and yogurt.

A noteworthy example is the recent launch of ProAct 360, the second-generation protease by the DSM-Novozymes Alliance on June 7, 2021. This innovative feed solution brings consistent advancements in growth performance, improved matrix values for essential amino acids, and rapid efficacy. As its name suggests, ProAct 360 truly embodies a comprehensive understanding of the requirements of poultry producers, as well as the environmental challenges associated with poultry production.

Application Type Insights

Based on application, the food enzymes market is categorized into bakery, dairy, beverages (non-alcoholic beverages, brewing, and alcohol production), fruit and vegetable processing, starch processing, meat, fish and egg processing, grain & oilseed processing, and other food applications. By 2023, the bakery segment is projected to capture the largest market share in the food enzymes market. This dominance is primarily attributed to the extensive utilization of food enzymes in bakery product manufacturing, the growing consumption of bakery products, urbanization trends, and ongoing innovations within the bakery industry.

Regional Insights

North America holds the largest market share in the food enzymes market based on geography, and it is projected to maintain its dominance during the forecasted period. The strong expansion of the North American market is closely tied to the growing trend of adopting naturally derived foods. The increasing consumer perception that organic additives are both healthy and safe drives the demand for food enzymes in the region.

The demand for premium processed meals without chemical additives has led to the wider application of enzymes in various food systems. Major players are investing more in innovative solutions, such as highly precise enzymes, which fuels the market expansion in the region.

Additionally, Asia Pacific is experiencing the fastest growth in the food enzyme market, thanks to its thriving food and beverage industry. The region's adoption of Western diets, coupled with the rising demand for bread products, dairy items, and beverages, continues to drive growth. These products are expected to incorporate food enzymes instead of synthetic chemicals, reflecting the increasing concerns about sustainability and food safety. The growing working population is also anticipated to drive the demand for processed food, directly contributing to market growth in the Asia Pacific region.

Key Market Players

DuPont de Nemours, Inc.

Amway, BASF

DSM, Novozymes

Chr. Hansen

Kerry Group

Biocatalysts

Puratos Group

Advanced Enzyme Tech

Sequence Biotech

Amano Enzyme

Report Scope:

In this report, the global food enzymes market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Food Enzymes Market, By Type:

Carbohydrase

Lipase

Protease

Others

Food Enzymes Market, By Application:

Bakery Products

Beverages

Dairy Products

Others

Food Enzymes Market, By Source:

Microorganisms

Animals

Plants

Food Enzymes 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

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the global food enzymes market.

Available Customizations:

Global Food Enzymes 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).

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