

# **Food Thickeners Market By Type (Protein, Starch, Hydrocolloids, and Others), By Source (Plant, Animal), By Application (Bakery, Confectionery, Dairy & Frozen Desserts, Sauces, Convenience food, and Others), By Region, By Competition Forecast & Opportunities, 2018-2028F**

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## **Abstracts**

The Flour Market reached a valuation of USD 165.5 billion in 2022 and is expected to experience robust growth in the forecast period, with a projected Compound Annual Growth Rate (CAGR) of 4.8% through 2028. The global flour market holds a central position in the food and baking industry, serving as a fundamental ingredient for a wide range of culinary applications. Flour, derived from various grains such as wheat, rice, corn, and others, is a versatile component that forms the basis of countless dishes worldwide. The market's growth is deeply rooted in its essential role in the food industry, serving as a foundational ingredient for bread, pastries, pasta, and a wide range of baked goods, making it a dietary staple across cultures. The surge in convenience foods and the increasing preference for ready-to-cook products have driven the demand for pre-processed flours, offering time-saving solutions for busy households.

Rapid population growth, urbanization, and changing lifestyles have led to increased consumption of convenience foods. Flour-based products like bread and instant noodles offer a quick and accessible source of sustenance, driving demand. As global tastes become more interconnected, the consumption of flour-based dishes transcends cultural boundaries, resulting in increased demand for wheat-based products in regions traditionally reliant on other grains.

Flour's versatility extends beyond baked goods; it's also used in the production of pasta,

sauces, snacks, and even in non-food industries like cosmetics and pharmaceuticals. To address nutritional deficiencies, many countries have initiated flour fortification programs, which involve adding essential vitamins and minerals to flour, particularly wheat flour. This has positively impacted market growth.

The market faces challenges arising from health-conscious consumers who are opting for gluten-free, whole-grain, and alternative flour options. This shift has led manufacturers to innovate and diversify their product offerings to accommodate changing dietary preferences. Factors such as adverse weather conditions, crop diseases, and transportation disruptions can significantly impact the availability and pricing of grains used for flour production.

#### Key Market Drivers:

**Changing Consumer Dietary Preferences and Food Habits:** The primary driver propelling the global flour market is the changing dietary preferences and food habits of consumers. As lifestyles evolve, there is a noticeable shift towards healthier eating habits and a greater emphasis on convenience. Whole grains, high-fiber foods, and natural ingredients are becoming increasingly sought after as consumers become more health-conscious. This driver is leading to a rising demand for whole wheat and specialty flours, which retain more nutrients compared to refined flours. Consumers are looking for flours that can cater to specific dietary needs, such as gluten-free, paleo, and keto diets. Manufacturers are responding by producing a diverse range of flours derived from various grains and legumes, catering to both traditional and emerging dietary preferences.

**Growing Global Population and Urbanization:** The world's population continues to grow at a rapid pace, particularly in urban areas. Urbanization is often associated with changes in lifestyles, including increased consumption of processed and convenience foods. These foods are often made from flour-based products, such as bread, pastries, and snacks. Consequently, the rising urban population is a major driver of the global flour market's growth. As more individuals move to urban centers, the demand for ready-to-eat and easily accessible foods increases. Flour-based products, being convenient and versatile, fulfill these requirements. Manufacturers are capitalizing on this trend by producing a variety of packaged and processed flour products, from pre-packaged baked goods to instant mixes, to cater to urban consumers' fast-paced lifestyles.

**Flour's Ubiquity in Culinary Traditions:** Flour occupies a central role in the culinary traditions of cultures worldwide. It serves as a foundation for staple foods, such as

bread, pasta, and noodles, that are consumed daily in various parts of the world. The deep-rooted culinary significance of flour-based products ensures a consistent and stable demand for flour globally. Furthermore, flour is a versatile ingredient that finds applications in a wide range of cuisines and dishes, from traditional to contemporary. It serves as a binding agent, thickener, and base for countless recipes. The cultural and culinary diversity of the world's population ensures that flour remains an essential ingredient across different cuisines and cooking practices.

### Key Market Challenges:

**Supply Chain Disruptions and Raw Material Availability:** Supply chain disruptions have emerged as a significant challenge for the global flour market. Factors such as extreme weather events, natural disasters, and the ongoing global pandemic have disrupted the production, transportation, and distribution of key raw materials like wheat. Fluctuations in weather patterns can affect crop yields, leading to supply shortages and price volatility. These disruptions can ripple through the entire supply chain, impacting flour millers, manufacturers, and ultimately consumers. Ensuring a stable and resilient supply chain is crucial for maintaining consistent product availability and stable prices.

**Shifting Consumer Preferences and Dietary Trends:** Changing consumer preferences and dietary trends present another challenge for the global flour market. As health and wellness awareness grows, consumers are seeking products that align with their nutritional goals. This has led to a shift away from traditional wheat flour towards alternatives like whole grain flours, gluten-free flours, and flours made from ancient grains like quinoa, amaranth, and spelt. Additionally, the rise of low-carb and keto diets has prompted some consumers to reduce their carbohydrate intake, impacting the demand for traditional flour-based products. Flour manufacturers and product developers must adapt to these evolving preferences by diversifying their product offerings and incorporating alternative flours into their portfolios.

**Sustainability and Environmental Concerns:** Sustainability and environmental concerns have become prominent challenges in the global flour market. Agricultural practices associated with wheat cultivation, such as intensive water usage and chemical inputs, can contribute to environmental degradation and resource depletion. Consumers and regulatory bodies are increasingly emphasizing sustainable sourcing, production, and packaging practices. Flour manufacturers are under pressure to adopt eco-friendly practices, reduce water usage, minimize chemical inputs, and explore energy-efficient milling processes. Furthermore, the demand for organic and locally sourced flours is growing, requiring companies to invest in sustainable supply chains and transparent

sourcing.

### Key Market Trends:

**Health and Wellness Focus:** One of the most significant trends in the global flour market is the increasing emphasis on health and wellness. As consumers become more health-conscious and aware of the impact of their dietary choices, there is a growing demand for flours that offer nutritional benefits and align with specific dietary preferences. Whole grain and alternative flours, such as almond, coconut, and chickpea flour, have gained popularity due to their higher fiber and nutrient content compared to traditional refined flours. These flours cater to consumers seeking healthier options with lower glycemic indexes and improved digestibility. Additionally, gluten-free flours are in high demand among those with gluten sensitivities or celiac disease. Manufacturers are responding to this trend by offering a wider variety of flours that cater to specific nutritional needs. The incorporation of ancient grains like quinoa, spelt, and amaranth into flours adds to the appeal, as these grains are often considered more nutrient-dense and less processed.

**Sustainable and Ethical Sourcing:** Sustainability and ethical sourcing have become significant considerations in the global flour market. Consumers are increasingly interested in the origin of their food products and are seeking brands that prioritize responsible sourcing and production practices. This trend extends to the wheat and grain used for flour production. There is a growing demand for flours made from organic, non-GMO, and locally sourced grains. Brands that emphasize transparent supply chains, fair trade practices, and reduced environmental impact gain favor among environmentally conscious consumers. Additionally, some companies are investing in regenerative agriculture practices that focus on soil health and ecosystem restoration, further aligning with sustainable trends.

**Technological Advancements and Innovation:** The global flour market is witnessing technological advancements and innovation that are reshaping production processes and product offerings. From milling technologies to new flour blends, innovation is driving the market's evolution. Advances in milling technologies have led to improved flour quality and efficiency. Techniques such as air classification, stone grinding, and roller milling are being refined to produce flours with optimal textures and nutrient retention. This is particularly relevant for whole grain flours, where maintaining the integrity of the bran and germ is crucial for nutritional value. Innovation extends to the development of functional flours that offer added benefits beyond traditional flour characteristics. Enriched flours with added vitamins, minerals, and other bioactive compounds cater to consumers looking for enhanced nutritional profiles. These flours

find applications in specialized diets, fortification efforts, and functional food products. Moreover, the incorporation of digital technologies is transforming supply chain management, allowing for better traceability and quality control. Blockchain and other digital platforms enable real-time monitoring of grain sourcing, production, and distribution, enhancing transparency and reducing the risk of contamination.

#### Segmental Insights:

**Type Insights:** Wheat flour holds a substantial share within the global flour market, thanks to its widespread utilization and enduring influence on the food industry. Its versatility makes it a staple in countless culinary applications worldwide, ranging from bread and pastries to pasta and noodles. Wheat's inherent gluten content gives it unique baking properties, making it the preferred choice for creating doughs that rise and maintain their structure. This attribute is pivotal in producing bread with the desired texture and volume, which is a fundamental aspect of many traditional diets and modern food preferences. The agricultural feasibility of growing wheat in different climates and soils adds to its prominence. Wheat cultivation is widespread and adaptable, contributing to a reliable global supply. Government policies and subsidies further bolster wheat's dominance in the flour market, ensuring a stable and predictable supply for both domestic consumption and export markets.

**Sales Channel Insights:** In the expansive landscape of the global flour market, the online sales channel has emerged as a pivotal force, capturing a significant share and transforming the way consumers access this essential commodity. The rise of the online sales channel can be attributed to several factors. Convenience stands as a cornerstone of this shift, as consumers increasingly seek hassle-free ways to purchase goods. Online platforms provide the convenience of ordering flour from the comfort of one's home, eliminating the need to visit physical stores. Furthermore, the vast assortment of flour varieties available online contributes to the channel's success. Whether it's all-purpose, whole wheat, gluten-free, or specialty flours, online platforms offer an extensive range to cater to diverse culinary needs and dietary preferences. Globalization also plays a pivotal role. Online platforms enable consumers to access flours from around the world that may not be readily available locally, allowing consumers to explore unique flours used in various global cuisines.

**Regional Insights:** The Asia Pacific region plays a vital role in the global flour market, boasting a substantial share that contributes significantly to the industry's dynamics. One of the key drivers of the Asia Pacific region's significant share in the global flour market is its dense population and vast consumer base. With countries such as China,

India, Indonesia, and Japan, the region is home to some of the world's most populous nations. This demographic advantage translates into high consumption levels of flour-based products, including staple foods like bread, noodles, and various baked goods. Furthermore, Asia Pacific's diverse culinary traditions contribute to the multifaceted nature of the flour market. From the rice-centric diets of East Asian countries to the wheat-based preferences in South Asia, the region encompasses a wide spectrum of flour usage. This diversity necessitates a range of flour types and qualities, catering to various culinary needs. Rapid urbanization and changing lifestyles in the Asia Pacific region also play a significant role. As more people migrate to cities and adopt busier routines, the demand for convenient and processed foods increases. Flour serves as a versatile ingredient in the production of packaged foods, instant meals, and convenience products. Moreover, the rise of a burgeoning middle class in many Asia Pacific countries has led to changing dietary habits and preferences, driving the demand for flours used in a wide array of packaged foods, snacks, and bakery items.

### Recent Developments

In May 2022, Gujarat Co-operative Milk Marketing Federation Limited (GCMMF), known for its products under the Amul brand, introduced organic whole wheat flour. Amul organic wheat flour will be offered in two different pack sizes and will be launched at Amul Parlors and prominent retail stores throughout Gujarat, India.

In December 2021, Ardent Mills, a prominent flour-milling and ingredient company, completed the acquisition of all business assets from Firebird Artisan Mills, a leading company specializing in gluten-free, specialty grain, and pulse milling.

### Key Market Players

Wudeli Flour Mill Group

Ardent Mills LLC

Archer Daniels Midland Company

General Mills

Allied Pinnacle Pty Limited

Manildra Milling Pvt Ltd

Acarsan Flour

Korfez Flour Mills

George Weston Foods Limited

Hodgson Mill, Inc.

Report Scope:

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

Global Flour Market, By Type:

Wheat

Rice

Maize

Others

Global Flour Market, By Sales Channel:

Supermarkets/Hypermarkets

Departmental Stores

Convenience Stores

Online

Others

Global Flour Market, By Application:

Bread & Bakery Products

Noodles & Pasta

Others

Global Flour Market, By Region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

Japan

South Korea

Vietnam

Europe

Germany

France

United Kingdom

Italy

Spain



South America

Brazil

Argentina

Colombia

Middle East & Africa

Saudi Arabia

UAE

South Africa

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the global flour Market.

## Available Customizations:

Global Flour 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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13.1.10.1. Company Details

13.1.10.2. Products

13.1.10.3. Financials (As Per Availability)

13.1.10.4. Key Market Focus & Geographical Presence

13.1.10.5. Recent Developments

13.1.10.6. Key Management Personnel

## **14. STRATEGIC RECOMMENDATIONS/ACTION PLAN**

14.1. Key Focus Areas

14.2. Target Type

14.3. Target Application

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