

Tiger Nuts Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Form (Whole, Powder, Oil), By Nature (Organic, Conventional), By End Use (Food Industry, Medicine Industry, Cosmetic Industry, Household, Others), By Region & Competition, 2019-2029F

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Abstracts

The global Tiger Nuts Market was valued at USD 287.45 Million in 2023 and is expected to reach USD 412.43 Million by 2029 with a CAGR of 6.25% during the forecast period. Tiger nuts, also known as earth almonds, are typically found in moist soils such as those in nut orchards, rice paddies, golf courses, and irrigated fields in warm climates. These tubers are beneficial in preventing colon cancer, obesity, and gastrointestinal disorders due to their powerful antioxidant properties. Rich in vitamins C and E, tiger nuts serve as a natural source of antioxidants, contributing to overall health and well-being. Spain, located in Southern Europe, and Nigeria, in Western Africa, are the leading countries in the cultivation and export of tiger nuts. In 2023, Spain produced 4,140 bags of tiger nuts, along with 5 bags of organic peeled tiger nuts. Meanwhile, Nigeria produced 760 bags of organic whole peeled tiger nuts.

Market Drivers

Rising Consumer Demand for Plant-Based and Gluten-Free Products

The growing consumer shift toward plant-based and gluten-free products is the major driver of the market. As more people adopt vegan, vegetarian, or gluten-free diets for health, ethical, and environmental reasons, the demand for alternative ingredients like tiger nuts has surged. Tiger nuts, also known as earth almonds or chufa, are naturally

gluten-free, making them an ideal option for individuals with celiac disease or gluten sensitivity. The increasing awareness of gluten intolerance and the rising number of people diagnosed with celiac disease have prompted many to seek gluten-free alternatives in their diets. Tiger nuts, being a naturally gluten-free, nutrient-dense ingredient, serve as an excellent substitute in various foods, such as flour, snacks, beverages, and dairy alternatives.

In addition to being gluten-free, tiger nuts are rich in fiber, vitamins, and essential minerals like magnesium, potassium, and iron, making them a highly nutritious plant-based option for consumers looking to improve their health. The rising awareness of the importance of plant-based diets in maintaining overall health has increased the appeal of tiger nuts as a sustainable and healthful food choice. This shift towards plant-based and gluten-free eating habits is a key factor propelling the market for tiger nuts, especially in developed markets like North America and Europe, where plant-based foods are rapidly gaining popularity.

Health Benefits and Nutritional Profile

The increasing awareness of health and wellness is another significant driver for the growth of the tiger nuts market. Tiger nuts are gaining recognition for their impressive nutritional profile, which includes high levels of dietary fiber, healthy fats, antioxidants, and essential minerals, making them a popular choice for health-conscious consumers. Tiger nuts are rich in resistant starch, a type of prebiotic fiber that aids in digestion and supports gut health. Resistant starch is also known for its role in managing blood sugar levels and promoting satiety, which is beneficial for weight management.

Additionally, tiger nuts are a good source of oleic acid, a monounsaturated fat that is known to support heart health by improving cholesterol levels. The high fiber content also promotes digestive health, preventing constipation and contributing to a healthy gut microbiome. This makes tiger nuts a valuable ingredient for people seeking to improve their digestion and reduce the risk of gastrointestinal diseases.

Tiger nuts are also naturally free of dairy, nuts, and soy, making them an ideal choice for people with food allergies or sensitivities. The combination of nutritional benefits and versatility makes tiger nuts an attractive ingredient in various food products such as snacks, beverages, dairy alternatives, energy bars, and gluten-free flour. The growing consumer interest in functional foods that provide additional health benefits beyond basic nutrition has further fueled the demand for tiger nuts. As more consumers seek foods that contribute to better digestion, heart health, and overall well-being, tiger nuts'

market growth is expected to continue.

Increasing Use of Tiger Nuts in the Food and Beverage Industry

Another key driver of the tiger nuts market is the increasing use of tiger nuts in the food and beverage industry. Tiger nuts are being incorporated into a wide range of products, from plant-based milks and dairy alternatives to gluten-free baked goods, snacks, and smoothies. Their versatility and mild, nutty flavor make them suitable for various applications in both savory and sweet products. As the demand for gluten-free, vegan, and clean-label foods rises, tiger nuts are becoming an essential ingredient for manufacturers looking to cater to these growing consumer preferences.

One of the most notable trends in the market is the growing popularity of 'horchata de chufa,' a traditional Spanish beverage made from tiger nuts, water, and sweeteners. This refreshing drink is gaining traction in global markets as consumers seek plant-based alternatives to dairy beverages like milk. As consumer interest in plant-based milks, including almond, oat, and rice milk, continues to grow, tiger nut-based milk is gaining attention for its nutritional benefits and unique flavor profile. The rise of functional beverages and dairy-free alternatives is expected to continue driving demand for tiger nuts in the beverage sector.

In addition to beverages, tiger nuts are being used in gluten-free flour blends, granola bars, protein powders, and snack foods. Their naturally sweet taste and texture make them an appealing option for food manufacturers looking to create healthier, allergen-free snacks and desserts. As the demand for functional and allergen-free foods continues to rise, the adoption of tiger nuts as a key ingredient is expected to expand. The versatility of tiger nuts in various food categories is a major driver for their increasing use in the food and beverage industry, contributing to the overall growth of the tiger nuts market.

Key Market Challenges

Supply Chain and Raw Material Sourcing

One of the primary challenges facing the tiger nuts market is the supply chain and raw material availability. Although tiger nuts are native to regions in Africa and Europe, particularly Spain and Egypt, their cultivation is relatively limited to certain areas. This means that production is highly dependent on specific geographic regions, and fluctuations in crop yields, caused by factors such as weather conditions, pests, and

diseases, can significantly impact the availability of tiger nuts.

In particular, extreme weather events like droughts or floods can have a detrimental effect on tiger nut crops, reducing overall yields. As the global demand for tiger nuts continues to grow, this limited geographic availability becomes a significant concern. Furthermore, the cultivation of tiger nuts requires specific conditions, including well-drained soil and warm temperatures, which can make large-scale cultivation challenging in regions outside of their native growing zones. For manufacturers who rely on a consistent supply of tiger nuts for food production, the risk of supply shortages or price fluctuations is a serious issue.

Another challenge is the relatively low mechanization of tiger nut farming. Unlike more widely grown crops such as wheat, rice, or corn, tiger nuts are typically harvested manually, making the process labor-intensive and costly. This can hinder efforts to scale production and keep costs down, which is a concern for both farmers and companies involved in the tiger nuts market. To address this challenge, investment in agricultural innovation and sustainable farming practices will be critical to improving supply chain efficiency and ensuring a steady, reliable source of raw materials.

Limited Consumer Awareness and Market Education

Despite the numerous health benefits and nutritional advantages of tiger nuts, consumer awareness remains a significant barrier to market growth. Unlike other popular superfoods like quinoa, chia seeds, or almonds, tiger nuts are still relatively unknown to many consumers, particularly in Western markets. Although tiger nuts have a long history of consumption in some regions—such as in Spain, where they are used to make the traditional beverage horchata de chufa—global awareness is limited.

For tiger nuts to gain widespread adoption, it is essential for companies to invest in consumer education and marketing campaigns. Many potential consumers may not be familiar with the versatility of tiger nuts, their nutritional profile, or how they can be incorporated into everyday meals. While some consumers may be aware of gluten-free and plant-based alternatives, tiger nuts are still relatively niche compared to other established ingredients in the gluten-free or plant-based food categories.

The lack of awareness is particularly challenging in markets where consumers have more established preferences for other gluten-free options like rice, almond, and oat products. As a result, companies must work to differentiate tiger nuts from these competitors and highlight their unique health benefits, such as their high fiber content,

resistant starch, and heart-healthy fats. Providing educational resources, including recipe ideas, health benefits, and product uses, through online platforms, social media, and retail partnerships will be key to overcoming this challenge. Additionally, collaborating with influencers, nutritionists, and chefs to promote tiger nuts could help build trust and expand their visibility among consumers.

Key Market Trends

Rising Popularity of Plant-Based and Natural Foods

The growing consumer preference for plant-based and natural foods is a major driver of the tiger nuts market. As more people shift toward vegetarian, vegan, and clean eating lifestyles, tiger nuts are gaining attention for their unique nutritional profile. These small tubers, also known as chufa or earth almonds, are naturally gluten-free, non-GMO, and packed with fiber, protein, vitamins, and healthy fats. This makes them an attractive alternative to traditional grains and nuts, particularly for individuals with dietary restrictions or those seeking to diversify their food intake.

Consumers are increasingly aware of the health benefits of natural and organic products, and tiger nuts fit well within this trend. They are rich in resistant starch, a type of fiber that acts as a prebiotic, promoting gut health. This is particularly appealing in the context of rising concerns about digestive health and the increasing demand for functional foods that offer benefits beyond basic nutrition. Furthermore, tiger nuts are often marketed as a superfood, which has helped drive their popularity in health-conscious markets.

Tiger nuts are also used to make a variety of plant-based products such as milk, flour, and snacks. These alternatives offer a dairy-free, nut-free option for individuals with allergies or sensitivities. The versatility of tiger nuts in food formulations has led to their widespread incorporation into plant-based and natural food products, contributing to their growing presence on supermarket shelves and e-commerce platforms. As the demand for plant-based options continues to rise, the tiger nuts market is well-positioned to experience significant growth.

Expansion of Tiger Nuts in Snacks and Convenience Foods

Tiger nuts are also becoming an increasingly popular ingredient in the snacks and convenience food sector. As consumers seek healthier, on-the-go snack options, tiger nuts provide a nutritious alternative to traditional snacks such as chips, cookies, and

candy. They are naturally high in fiber, which can help with satiety, and rich in antioxidants, which appeal to health-conscious snackers.

Tiger nut-based snacks, including roasted tiger nuts, tiger nut granola bars, and energy balls, are gaining popularity among consumers looking for clean-label, gluten-free, and minimally processed options. Additionally, tiger nuts can be used as a substitute for nuts in various snack formulations, making them ideal for individuals with nut allergies. Their versatility also extends to use in baking mixes, trail mixes, and protein bars, all of which appeal to active consumers and athletes looking for nutrient-dense snack options.

The trend toward health-focused, low-sugar snacks is also benefiting the tiger nuts market. Unlike many processed snack foods, tiger nuts are naturally sweet and have a low glycemic index, making them an attractive option for those managing blood sugar levels or seeking to reduce their sugar intake. As demand for healthier snack alternatives continues to grow, especially in developed markets like North America and Europe, tiger nuts are poised to become a staple ingredient in the snack food industry.

Segmental Insights

Form Insights

Among the various forms of tiger nuts whole, powder, and oil, the whole tiger nuts segment dominates the global market. Whole tiger nuts are the most widely consumed form, particularly in regions like Europe, where they are eaten as snacks or incorporated into traditional foods like horchata, a popular Spanish beverage made from tiger nut milk. Their popularity is driven by their versatility, ease of use, and long shelf life. Whole tiger nuts are also a common ingredient in granola bars, snack mixes, and trail mixes, appealing to health-conscious consumers looking for nutritious, plant-based options.

However, the powder form of tiger nuts is growing rapidly, particularly in the functional food sector. Tiger nut flour is gluten-free, high in fiber, and rich in healthy fats, making it a popular choice for baking, smoothies, and as a substitute for other flours in gluten-free recipes. The increasing demand for gluten-free and clean-label products is driving the growth of this segment, as tiger nut powder offers a natural, nutrient-dense alternative to traditional flours. Tiger nut oil, though not as widely consumed as whole or powdered forms, is gaining attention due to its nutritional benefits and potential in the beauty and wellness sectors. It is rich in unsaturated fats, vitamin E, and antioxidants, positioning it as a premium product in both culinary and cosmetic applications.

Regional Insights

The Europe region is the dominant region for tiger nuts, driven by several key factors including the increasing consumer demand for plant-based and gluten-free foods, as well as a growing awareness of the health benefits associated with tiger nuts. Europe has seen a notable shift towards healthier eating habits, with consumers seeking natural, organic, and functional foods. Tiger nuts, with their rich nutritional profile, are particularly appealing in this context, as they are high in fiber, healthy fats, vitamins, and minerals, while also being allergen-friendly. Countries like Spain, where tiger nuts are native and traditionally consumed as 'chufa,' have long embraced the tuber in various forms, from raw snacks to beverages like 'horchata' (a tiger nut milk drink). As consumers in other European markets become more health-conscious, tiger nuts are gaining popularity in other forms such as flours, milks, and snacks. The region's well-established trend toward vegan and gluten-free products further supports this demand. Moreover, Europe's advanced food industry and retail networks facilitate the distribution of tiger nut-based products through both physical and online stores. This accessibility, combined with increasing consumer awareness and interest in plant-based and functional foods, is likely to keep Europe at the forefront of the global tiger nuts market.

Key Market Players

Jos? Mar?a Bou, S.L.

Ecoideas

KCB International B.V.

Kofi Vinyo Company Limited

Pamela's Products

RAPUNZEL NATURKOST GmbH

Fartons Polo SL (The Chufa Original Company)

Tiger Nuts USA

TIGERNUTS TRADERS, S.L.

Tradin Organic Agriculture B.V.

Report Scope:

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

Tiger Nuts Market, By Form:

Whole

Powder

Oil

Tiger Nuts Market, By Nature:

Organic

Conventional

Tiger Nuts Market, By End Use:

Food Industry

Medicine Industry

Cosmetic Industry

Household

Others

Tiger Nuts Market, By Region:

North America

United States

Canada

Mexico

Europe

France

Germany

Spain

Italy

United Kingdom

Asia-Pacific

China

Japan

India

Vietnam

South Korea

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Kuwait

Egypt

South America

Brazil

Argentina

Colombia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the global Tiger Nuts Market.

Available Customizations:

Global Tiger Nuts Market report with the given market data, TechSci 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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15. STRATEGIC RECOMMENDATIONS/ACTION PLAN

- 15.1. Key Focus Areas
- 15.2. Target Form
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