Shifts in natural polymer landscape
The fracking boom in North America reached its apex in the 2010-2015 period. Now the key natural polymers used in oilfield applications, guar gum and xanthan gum, will see more moderate growth going forward. However, the rising popularity of gluten-free foods should drive use of xanthan gum. Increasing demand for green alternatives in industries such as packaging and textiles will catapult other natural polymers into strong double-digit growth in the forecast period. Furthermore, food ingredients that offer pleasing eating and drinking experiences will propel growth for pectin. In addition, cellulose ethers will be supported by ongoing demand for water-based, low VOC coatings.

Weather & politics affect demand
Much of the change in natural polymer demand and pricing is due to the current state of supply, which is subject to various regions’ weather and geopolitical situations. Many natural polymers are indigenous to certain parts of the world. Poor crop yields in key growing areas have caused supply pinches and price inflation in pectin, for example, and has caused end users to seek out alternatives. Oil and gas producers, too, briefly sought out alternative solutions, namely to guar gum, as prices rose nearly tenfold between 2011 and 2012! Guar gum is mainly imported and openly traded on exchanges in India, where regulators suspended trading before it returned to lower price levels in 2013.

New product introductions
Recent products include the 2015 US FDA-approved JUVEDERM ULTRA XC, which is made from hyaluronic acid, manufactured by Allergan for lip augmentations that lasts up to a year. Hyaluronic acid is exhibiting a surge in popularity as not only a dermal filler but also a moisturizer in topical applications. In food and beverage applications, to combat supply constraints and meet demands of the marketplace, TIC Gums has introduced a variety of pectin substitutes that contain natural polymers such as alginates, agar, and locust bean gum.

Study coverage
This study analyzes the US market for natural polymers. It presents historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) by market (food and beverages, medical, oilfield, cosmetics and toiletries, coatings and inks, construction, adhesives, packaging, textiles, other) and product (cellulose ethers, starch and fermentation polymers, exudate and vegetable gums, protein-based polymers, marine polymers, other). The study also assesses key market environment factors, analyzes the industry structure, evaluates company market share and profiles US industry competitors.
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Food and Beverages: Natural Polymer Demand

Demand for natural polymers in the food and beverage market is forecast to rise 1.7 percent yearly to $1.6 billion in 2020, reaching 342 million pounds. This industry represents a large and mature market, but the popularity of functional foods and the rising use of natural polymers as emulsifiers and stabilizers will be supported by trends that favor natural ingredients. Confections and baked goods will remain the leading outlet for natural polymers, with demand supported by the use of these polymers as substitutes for guar gum. Carboxymethyl cellulose (CMC) and xanthan gum represent the leading product types and will maintain strong positions going forward, continuing to benefit from their suitability as substitutes for guar gum. Demand for xanthan gum will also be supported by its use as a substitute for wheat gluten in gluten-free foods, which are sustaining their popularity.

Demand for CMC and xanthan gum, as well as other gum types, will be aided by the desire among food and beverage processors to reformulate their products in an effort to reduce or diversify away from an over-reliance on any single natural polymer additive. Processors were forced to shift away from guar gum due to concerns regarding the price and availability of the hydrocolloid in the early part of this decade. The trend toward hydraulic fracturing in the oil and gas industry generated significant demand for guar gum, which in turn resulted in supply concerns and drove prices sharply upward. More recently, the same concerns for pectin, for example, have prompted companies like TIC Gums to offer food additive pectin substitutes. As such, food and beverage producers seeking out products with more stable supply and pricing are increasingly utilizing alternatives like CMC and xanthan gum, as well as agar, carrageenan, locust bean gum, starches, tara gum, and various blends developed by natural polymer suppliers.

This study can help you:

• Determine your market & sales potential
• Learn more about industry competitors
• Assess new products & technologies
• Identify firms to merge with or acquire
• Complement your research & planning
• Gather data for presentations
• Confirm your own internal data
• Make better business decisions

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- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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- Industrial Components
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- Machinery & Equipment
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