Business Review

Added-value Rice Ingredients – Broken Rice, Starches, Proteins and Hydrolysates

Supply, Demand, and Forecast in Selected Regions

2024 – 2029

INTRODUCTION

Rice is the world's second most produced grain (after maize), providing over one-fifth of the calories consumed worldwide. The rice kernel can become cracked in the field, during drying, or milling, leading to the generation of broken rice. In order to provide the consumer with a high-quality product, the broken rice content is reduced to less than 5%. Historically, broken rice has been used to produce beer, rice flour, and pet food. Broken grains are also transformed into rice starches, proteins, and syrups, valued for their hypoallergenic properties. In light of the growing consumer interest in plant-based ingredients, suppliers are increasingly offering these ingredients as part of a clean-label portfolio. Rice syrups are produced by hydrolysing rice starch, with sweetness and viscosity varying according to the degree of conversion. Low DE syrups exhibit lower sweetness and a thicker consistency, whereas high DE syrups demonstrate higher sweetness and reduced viscosity. Rice syrups are used across diverse food products, including beverages, baked goods, and confectionery. Additionally, these syrups find applications in brewing and as humectants in cosmetic formulations. Rice proteins serve as a hypoallergenic and vegan source of protein, available in various forms. Rice protein concentrate typically contains 70-80% protein content, while rice protein isolate usually comprises 90% protein or higher. These proteins are increasingly used in sports nutrition, plant-based food products, and hypoallergenic formulations. The rise in popularity of rice ingredients is also attributable to their nutritional advantages and functional versatility across applications.

OBJECTIVES

To identify supply, demand, forecast demand, and trends for rice starch, syrup, and protein by key country/region. This comprises the following sub-objectives:

- On a country/regional level, to report the rice cultivation and flow, including production, import, export, and assumed consumption, and the total production of broken rice
- Estimate current production volumes (kt) by manufacturer, country/region, and by rice ingredient (starch, protein, hydrolysate)
- Split broken rice consumption by application

For rice ingredients (starch, protein, hydrolysate):

- Profile manufacturers and their rice ingredients
- Track trade volumes (kt) between different countries/regions to estimate availability (kt)
- Obtain indicative prices and pricing trends by country/region and rice ingredient
- Summarise legislation governing the use of rice ingredients in each country/region
- Provide end-user insights into the current and anticipated use of rice ingredients, competitor ingredients, and other relevant information
- Estimate current (2024) and forecast demand (2029) demand volumes (kt) for each rice ingredient by country/region and end-use sector
- Deliver client-specific summaries and strategic recommendations

PRODUCTS

Broken rice, Rice starch: native starch, physically modified starch, clean-label functional starch, and chemically modified starch. **Rice hydrolysates**: rice syrup DE60, rice syrup DE42, rice syrup DE28, dried rice syrups, and maltodextrin (DE 7-20). **Rice protein**: rice protein concentrate (~90% protein, dsb) and rice protein isolate (=/+90% protein, dsb)

END SECTORS

Functional foods, functional beverages, infant formula/baby foods, confectionery, bakery, breakfast cereals, dairy, dairy alternatives, meat alternatives, other foods, pharmaceuticals, other non-food

GEOGRAPHICAL

Europe (EU27+UK+NO+CH), North America (USA+CA), China, ASEAN, India, Egypt, and ROW

TIMESCALE

Supply and current demand for 2024; forecast demand for 2029

SUBSCRIPTION

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