Global Dehydrated Food Products Market Analysis and Forecast (2016-2025)

By

Dhruv Malha

Dissertation submitted for the partial fulfillment of the

MBA Pharmaceutical Management

Academic year, 2015-2017

The IIHMR University, Jaipur

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INSTITUTE OF HEALTH
MANAGEMENT RESEARCH
(WHO Collaborating Centre for District Health System Based on Primary Health Care)

IIHMR UNIVERSITY

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This is to certify that **Dhruv Malha** student of MBA Pharmaceutical Management from The IIHMR University, Jaipur has undergone internship training at **Future Market Insights** from 6th February 2017 to 12th May 2017.

The Candidate has successfully carried out the study designated to his during internship training and his approach to the study has been sincere, scientific and analytical.

The Internship is in fulfillment of the course requirements.

I wish him all success in all his future endeavors.

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Future Market Insights

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May 5, 2017

TO WHOM IT MAY CONCERN

This is to certify that **Dhruv Malha** pursuing **MBA - Pharmaceutical Management** from **The IIHMR University, Jaipur** has successfully completed Major Project/ Dissertation in our organization on the topic, **"Dehydrated Food Products Market: Global Industry Analysis and Forecast 2017-2027"** from **February 6, 2017** to **May 12, 2017.**

During the project tenure in the organization, we found **Dhruv** is hard working, sincere and inquisitive.

We wish him all the best and success in his future endeavors.

Future Market Insights Global & Consulting

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CERTIFICATE BY SCHOLAR

This is to certify that the dissertation titled **“Global Dehydrated Food Products Market Analysis and Forecast (2016-2025)”** submitted by **Dhruv Malha** Enrollment No. **IIHMR-U/01/2015-17/0034** under the supervision of **Mr, Abhishek Dhadhich** for award of **MBA Pharmaceutical Management**of the University carried out during the period from **6th February 2017 to 5th May 2017** embodies my original work and has not formed the basis for the award of any degree, diploma associate ship, fellowship, titles in this or any other institute or other similar institution of higher learning.

Dhruv

Signature

THE IIHMR UNIVERSITY, JAIPUR

CERTIFICATE BY SCHOLAR

This is to certify that all ethical issues have been considered while collecting data for my dissertation titled **"Global Dehydrated Food Products Market Analysis and Forecast (2016-2025)"**

Signature of student

Acknowledgement

The satisfaction and euphoria that accompany the successful completion of the project would be incomplete without the mention of the people who made it possible.

First of all, I express my sage sense of gratitude and indebtedness to our President, Dr. Vivek Bhandari and The IIHMR University.

I would like to extend my sincere and heartfelt thanks to Mr Abhishek Dadhich, Assistant Professor, The IIHMR University for providing me an opportunity to learn and develop professionally.

I am greatly indebted to him for providing his valuable guidance at all stages of the study, his advice, constructive suggestions, positive and supportive attitude and continuous encouragement, without which it would not have been possible to complete the project.

To place on record, I owe a debt of gratitude to all my teachers for grooming me and my classmates for the inspiration needed to work with dedication and motivation throughout the project.

I hope that I can build upon the experience and knowledge that I have gained and make a valuable contribution towards the industry in coming future.

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Executive Summary

This report provides an analysis and evaluation of the current and prospective proliferation of global dehydrated food market.

Global dehydrated food products market revenue is expected to increase at a CAGR of 4.09% during the forecast period (2016-2027)

In terms of revenue dehydrated fruits segment dominated the market in 2016. The segment is expected to continue to dominate the market, owning to supply side demand of dehydrated fruits in processed food products such as dehydrated fruits in chocolates.

Asia Pacific dehydrated food market accounted for largest revenue market share of 33% in 2016, and is also expected to register the fastest CAGR of 4.2% during the forecast period due to high consumption of instant noodles.

In the technology segment spray dried technology account for 71.01% in 2016, and is expected to register the fastest CAGR of 4.6% during the forecast period

In the sales channel segment supermarkets/hypermarkets segments account for US$ 56.9 Bn in 2016, and is expected to register the fastest CAGR of 4.1% during the forecast period however the sales from online retail is expected to witness the fastest growth rate of 6.7% CAGR

Introduction

Drying or dehydration is a process through which moisture or water content is removed from the food. Removing of water content from food makes them lighter and smaller. It helps in preservation of food for longer period of time. Dehydrated food does not require any refrigeration while preserving at home or at the time of consumption. Moreover, dehydrated food is ideal for preserving seasonal fruits and vegetables. Dehydrated food offer high nutritional value, easy storage properties and availability at low price, which is driving the demand of dehydrate food across the globe.

Rising demand of food products with longer shelf life coupled with the increasing demand of seasonal products across the year is supporting the growth of dehydrated food market during the forecast period. Moreover, increasing demand by food manufacturers for preserving food product for longer period so that they could use it as an ingredient in their final product is also fueling the demand of dehydrated food market during the forecast period.

Some of the international players operating in dehydrated food market are

- General Mills Inc.
- Ting Hsin International Group
- Unilever PLC
- Nestle S.A.
- Ajinomoto Co. Inc.
- House Foods Corp
- Nissin Food Holdings Co. Ltd
- Kraft Foods Inc.

Segmentation

For the purpose of the study the global dehydrated market is segmented into three distinct segments

By Product Type

- Dehydrated food market is segmented on the basis of types. This includes dehydrated dairy products, dehydrated fruits, dehydrated meat products, dehydrated vegetables, instant noodles, and instant soup. Increasing demand for enhanced year around availability of processed and canned meat products among the manufacturers is expected to support the demand of dehydrated meat products in the near future. Moreover, the dehydrated fruits and dehydrated vegetables segments respectively are expected show a favourable growth attributed to rising demand of seasonal fruits and vegetables.

By Technology

- Dehydrated food market is segmented on the basis of technology which includes spray dried and freeze dried, whereas vacuum dried, sun dried, hot air dried in others. Traditionally among all these segments sun dried process of dehydration was the major segment in terms of usage by food manufacturers followed by hot air dried process. However due to efficiency in use of new technology, spray dried is expected to account for a substantial contribution in the market revenue, followed by freeze dried during the forecast period. Vacuum dried segment is expected to show a consistent growth and thus included in other segment. Limited usage in food products is expected to be the restraining factor for the growth of vacuum dried technology in dehydrated food market in the near future.

By Sales Channel

- The sales channel is one of most important aspect for placing the right product in the right place, for this purpose manufacturers target supermarkets, neighbourhood stores, continent stores and more trending online retail. It is thus important to study the most effective target place for the sales of dehydrated food products.

By Region

- Dehydrated food market can also be segmented on the basis of region. Increased consumption of meat products in North America is expected to support the demand of dehydrated food products across the region. Europe is also expected to be one of the prominent contributors in dehydrated food products market in terms of revenue followed by Asia Pacific. Moreover, in terms of production of dehydrated food China is expected to be one of the prominent producers of dehydrated food products. In addition, China is one of the largest meat products producers along with prime producer of various seasonal fruits and vegetables. This is expected to contribute towards significant growth in the country.

- North America
  - U.S
  - Canada
- Western Europe
  - France
  - Germany
  - Italy
  - Spain
  - U.K.
  - NORDIC
  - BENULUX
  - Rest of Western Europe
- Eastern Europe
  - Russia
  - Poland
  - Rest of Eastern Europe
- Asia Pacific
  - China
  - India
  - Australia
  - ASEAN
  - Rest of Asia Pacific
- Japan
- Latin America
  - Argentina
  - Mexico
  - Brazil
  - Rest of Latin America
- Middle east and Africa
  - GCC
  - South Africa
  - Rest of Middle East and Africa

Rationale

A significant shift in population from rural to urban areas in various developing economies, rapid lifestyle changes in terms of working hours, commuting time and daily chore time are some factors resulting in a shift towards more convenient or packaged food options. An increasing number of working professionals, single-person households and students are opting for food products to match their lifestyle, which they can easily pick from supermarkets or convenience stores, rather than face challenges related to cooking a conventional breakfast. For this reason, the consumers have shown interest in dehydrated food, quick to dispense it has now become one of the important necessities in this fast pace lifestyle. Instant dehydrate coffee for example has now an ever increasing demand. The manufacturers of dehydrated food can take advantage of these rising demands from consumers and offer right products in a strategic market place using the most feasible supply chain. This report focuses on these core areas and provides deep insights

This report provides information on:

- Dehydrated Food market estimates and forecasts
- Market potential assessment for companies to leverage
- Biggest and the fastest growing market for dehydrated food products
- Global trends in the market of consumer goods pertaining to dehydrated food
- Market competition assessment
- Factors driving its growth
- Challenges and opportunities in the market

Research Question

- What is the market potential of dehydrated food products at global level?

Objectives

- To understand the market potential of dehydrated food products on a global scale
- To identify the factors driving the growth of dehydrated food products
- To identify the growth opportunities in various segments of dehydrated food products market.

Methodology

Type of Study- Retrospective study

Predicting future market size and attractiveness using of historic data and trends

Study Method- Secondary research

- Internal Desk Research
  - Using data available in the organisation
- External Desk Research
  - Online Desk Research (Company Annual Reports, various research articles and publications
  - Government published data

- Approach (Data collection)
  - Identification of key market players. Extensive product mapping for all product offerings pertaining to dehydrated food. Review of company profiles and financial data using annual reports and paid data sources. Revenue of the companies from the segment was identified and also revenue generation for the segment from various regions was identified. Global trade date was used for analysis of consumption trends and key regions. CAGR was set for all the segments on the basis of company financials and FMI's internal trend setting model
- Tools and techniques
  - MS Excel is used for analysis, CAGR is calculated from historical data
- Study Duration
  - 3 months (6st February 2017 to 6th May2017)
- Internal Desk Research
  - Using data available in the organisation
- External Desk Research
  - Online Desk Research (Company Annual Reports, various research articles and publications

- Government published data

Qualitative Analysis

There are several factors which are expected to drive the global dehydrated market and, various challenges, trends and opportunities has also been identified.

These factors can be categorized as:

Factors driving the global dehydrate food market

- **Salvation of Taste**
- The use of less degrading non-thermal method of dehydrating food has led to taste and flavor preservation and the popularity of the same continues to drive the market growth.
- Dehydrated nuts and raisins have a distinctive taste and used as food additives for its flavor, making its own unique selling point.
- Increasing seasonal food demand has also triggered growth in dehydrated food products and this demand has to be met throughout the year. For this reason, dehydrated fruit powders like mango, watermelon etc. are expected to drive the dehydrated food market
- **Rapid urbanization and hectic lifestyle**
- A significant shift in populations from rural to urban areas in various developing economies is another factor driving market growth. Rapid lifestyle changes in terms of working hours, commuting time and daily chore time are some factors resulting in a shift towards more convenient or packaged food options. An increasing number of working professionals, single-person households and students are opting for food products to match their lifestyle, which they can easily pick from supermarkets or convenience stores, rather than face challenges related to cooking a conventional breakfast, For this reason the consumers have shown interest in dehydrated food, quick to dispense it has now become one of the important necessities in this fast pace lifestyle. Instant dehydrate coffee for example has now an ever increasing demand
- **Increasing awareness among health conscious consumers**
- A considerable shift towards consumption of healthy food and the role of internet in providing relevant and quick access to health information is driving the global dehydrated food market

- Soups contribute to a large portion of dehydrated vegetables and being popularly used. These soups are concentrated forms of vegetables and have high nutrition by weight ratio. Increasing consumer awareness regarding the health benefits of dehydrated food and the convenience in use synergies the growth of global dehydrated food products.
- **High Prevalence of Sedentary Lifestyle**
- Dehydrated food has an increased shelf life, hence can be stored for a long time and the reusability of dehydrated powder form of fruits, vegetables and dairy has further synced in with the consumer's sedentary lifestyle.
- **Convenience associated with dehydrated food**
- Consumption of seasonal fruit and vegetables, ease of preparation of food, storage for a long period of time are few of the key conveniences in use of dehydrated food. A rapid shift towards consumption of packaged foods in developed countries such as the U.S., Germany and U.K., coupled with rising consumer preference towards convenience foods is driving growth of the global dehydrated food market
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Factors limiting the growth of dehydrated food

- **Affordability and Consolidated Trust for Fresh Food**

- The already established products from global leaders are witnessing a slower growth rate which is mainly due to the fact that consumers are eying new products and these global leaders have to come up with more innovative umbrella branding.

- The nature of competition in the global dehydrated food market has become highly competitive, with a lot of manufacturers competing with each other to satisfy the wants and needs of a large number of consumers. New companies coming up with new products or introducing similar products with additional perks have impacted this slow growth of established brands.

- **High Competency by Other Forms of Food**
- Dehydrated foods face a lot of criticism from fresh food favoring consumers, to add to this dehydrated food will find it difficult to replace canned and frozen food because these methods do a better job of retaining the taste, appearance, and nutritive value of fresh food.
- **Lack of Consumer Awareness**
- The dehydrated food has been concentrated by removing the moisture content which increases the calorie content. A lack of awareness among consumers with this regard is leading to weight gain and consequently consumers are becoming spectacled for the use of dehydrated food.
- **Competitive Market and Emergence of New Competitors**
- The added processing cost in manufacture of dehydrated food makes it relatively much more expensive than fresh food or even frozen food. Hence the penetration of dehydrated food remains limited.
- The consumer's perception for fresh food remains intact and tends to shown a high affinity for fresh fruits and vegetables.
- The frozen food is another alternate to dehydrated food which is less expensive and more commonly used
- **High Bargaining Power of Consumers**
- Consumers are more demanding and less predictable. A stable growth can only be achieved by constantly creating value for increasingly personalized and diverse customer.
- The switch for a customer from on brand to another is very high due to the availability of numerous substitutes, giving consumers a high bargaining power for the choice of dehydrated food.

Opportunities in the global dehydrated food market

- **Room for Substantial Value Creation**

- Manufacturers should emphasize on being able to resolve issues related to nutrition. A large number of consumers remain oblivion to the nutritional values in dehydrate food and are opting for an alternate. Improving consumer's understanding about dehydrated food will lead to substantial value creation.

- The consumers are now much more health conscious and concerned about their personal wellbeing while simultaneously matching the fast pace life. They are willing to pay extra for healthy and nutritious food products. By communicating the health benefits of dehydrated food, manufacturers can attract a large segment of population.

- **New Snacking Concepts And Use Of REV Technology**

- A more cost effective alternative to freeze drying, the use of Radiant energy vacuum dehydrating technology in manufacture of dehydrated food, which has shown great potential. Further introduction of new snacks like moon cheese by Nutradried LLP., is gaining significant traction. More such products can be introduced offering a great opportunity in dehydrated food products market.

- The revenues derived by the sale of moon cheese which went from CAD $ 2.1 Mn in 2015 to CAD $ 6.1 Mn in 2016 alone can give an idea on the huge market potential of new technology based dehydrated food.

- **Market expansion**

- The accessibility of dehydrated food in developing countries is not significantly high. With the rise in working population and subsequent rise in per capita income in these developing countries, there is a great penetration potential for dehydrated food products.

- Matching the demand to supply in these high demand regions is of prime importance to assure a sustained growth in the global market. Nestlé, producing a large proportion of dehydrated coffee powder has further expanded its presence in Africa by investing over a billion ZAR on its coffee processing plant.

- **Merger, Acquisitions And Joint Ventures**

- The adaptation of new technologies has created great opportunities for global leaders to exploit and create new value added products.
- The opportunity for growth in the dynamic dehydrated food product market has already attracted market leaders to set up joint ventures and mergers with regional players
- Ajinomoto's $532 Mn purchase of Promasidor Holdings places Ajinomoto at the core of the fast growing African market for powdered drinks and seasonings.

Global trends in dehydrated food market

- **High Demand of Dehydrated Food in Fast Food Chain**
- Dehydrated food demand in fast food chain is impacted by the growing consumer preference in healthy food
- Instant pasta preparation, hot sauces preparations and use in pizza toping has kicked off the use of dehydrated food
- **Rising Demand For Dehydrated Milk Powder**
- Dehydrated milk powder market is largely driven by increasing demand in food industry especially in bakery and confectionery items.
- Companies like Nestle India has launched pro grow milk powder and further strengthening its dehydrated milk portfolio.
- **Increasing Popularity of Dehydrated Food as Camp Food**
- Dehydrated food has gained momentum with high acceptance as camp food, with brands like good to go and mountain house targeting this segment of outdoor enthusiasts.
- **Increasing Demand of Dehydrated Fruit Chips**
- The demand for dehydrate fruits chips has seen a massive rise in regions of North and Latin America

- Barnana Company, manufacturing dehydrated bananas, coconut bits and more has grown to generate a $ 6,1Mn revenue in 2016.

- **Demand in Dehydrated Fruit Flavors**
- Dehydrated fruit powder has gained significant attraction as fruit flavor and manufacturers are introducing new flavors thus, generating a supply side demand
- Blue Pacific 's introduction of Baobab fruit powder to add to its unique product portfolio
- **Military; Long Range Patrol Ration in Popularity**
- Long range patrol rations have an astounding shelf life of over 10 years. These are further light weight and easy to carry in combats
- For this reason, Mountain House, a brand of ODF Foods LLC. Has further strengthened its portfolio buy adding popular breakfast meals like scrambled eggs and bacon.
- **Demand for Dehydrated fruits in chocolates**
- With consumers preferring a health meal, the chocolate industry has also introduced consumer centric products.
- Nestlé's fitness bar using dehydrated fruits and nuts along with cereals to cater to this shift on healthier chocolate demand.
- **New Dehydrated Food Products Generating Demand**
- The launch of REV technology based dehydrates food like moon cheese by Enwave gained superior market in 2016.
- Enwave further in 2017 announced an agreement with Bonduelle to improve production capacity of REV.

Competition Analysis

Global dehydrated food market is highly competitive with global leaders in food and beverages using strategic acquisitions, mergers and expansion strategies to match the high competence

Some of the global players offering dehydrated food products include

Nestlé S.A

- ❑ Nestlé S.A. is a Swiss multinational food and beverages company, headquartered in Vaud Switzerland.
- ❑ It has been the largest food company in the world

Strength	Weakness	Opportunities
• World's largest Food and Beverages company • Nestle is a highly-diversified company operating in many different markets and sectors of those markets.	• Much of its sales depend upon a few well-recognized brands.	• Growth in online retail • Growing middle classes in nations such as China and India

Key Developments

- ❑ Nestlé signs agreement to acquire Egyptian instant coffee company Caravan
- ❑ OCT 7, 2016 Nestlé Nespresso's expansion of coffee plantation. The CHF 6 million investment will help more than 40,000 smallholder coffee farmers across Ethiopia and Kenya.

Conagra Brands Inc.

- ❑ Conagra Brands Inc. is a North American food processing company with headquartered in Chicago, Illinois.
- ❑ Conagra makes and sells products with variety of established brands

Strength	Weakness	Opportunities
• A strong supply chain • A low cost leader in market	• Demand for certain of food items by Conagra Foods Inc. may be influenced by holidays, changes in seasons, or other annual events	• Rooms for global expansion • New products can help ConAgra Foods, Inc. to expand their business

Key developments

- ❑ Conagra to Acquire Thanasi Foods, Maker of Duke's Meat Snacks BIGS Seeds. The Duke’s and Bigs brands will be added to Conagra’s product portfolio, which includes Slim Jim meat snacks and David Seeds.

Bonduelle S.A.

- ❑ Bonduelle is a French company producing processed vegetables.
- ❑ Bonduelle one of the key manufacturer in the canned and frozen vegetables industry has witnessed steady growth in the food industry

Strength	Weakness	Opportunities
• World leader in processing vegetables	• Limited Financial capacities	• Development in the rest of the world, particularly

• Strong hold in the European market		in Eastern Europe for the Bonduelle

Key Developments

- ❑ The March 21 2017 Completion of the Ready Pac Foods acquisition. Increasing their packed vegetable market in America.

General Mills Inc.

- ❑ General Mills, Inc., an America based multinational manufacturer and marketer consumer foods
- ❑ Best known for its breakfast cereals

Strength	Weakness	Opportunities
• Market leader in several product sectors (notably breakfast cereals) • Strong presence in major developed markets	• Limited exposure to high-growth emerging	• Potential to revive US sales by offering natural products • Further expansion into emerging markets

Key Developments

- ❑ JAN 10, 2017 General Mills unveils new products for 2017, LÄRABAR Fruit and Greens bar,

Unilever PLC.

- ❑ Unilever is a multinational consumer goods company
- ❑ Its products include food, beverages, cleaning agents and personal care products

Strength	Weakness	Opportunities
• Unilever operates in nearly 190 countries around the world • It has a deep and broad	• Products can easily be replaced with substitutes especially in the emerging	• The emergence of the health conscious consumer

portfolio of brands	markets in Africa and Asia	

Olam International Ltd.

- Olam International is one of the leading agriculture business
- Offers products in over 70 countries

Strength	Weakness	Opportunities
• A leading global integrated supply chain across countries • High Barriers to entry	• Being in the niche • Liquidity of certain products	• Rapid urbanization resulting in higher per capita consumption • Growing population and increase in food consumption per capita

Key developments

- In January 20, 2017 Olam, Increased coffee output, Olam meets growing demand from specialty coffee customers for certified Arabica

Fonterra Co-operative Group Ltd.

- Fonterra Co-operative Group Limited is a New Zealand based multinational dairy products manufacturer
- Companies product offerings includes all dairy based food products such as skim milk powder

Strength	Weakness	Opportunities
• Global leaders in dairy ingredients business • Main supplier to Chinese market	• Negative publicity • Suspension of operation due to botulism	• With the increasing consumption of milk powders in developing countries, the demand for

• Global sales network and well established customer base		Fonterra's SMP and WMP presents a great opportunity

Key Developments

- In March 10 2017 Fonterra produces low lactose milk powder to attract new consumers, with a new low lactose instant whole milk powder.

Ajinomoto Co Inc.

- Ajinomoto Co., Inc. is a Japanese food and chemical corporation producing seasonings, cooking oils, sweeteners, amino acids, and pharmaceuticals

Strength	Weakness	Opportunities
• High cost advantage • Bargaining power of both suppliers & buyers is low	• Rely heavily on advertising • Focus way too high in seasonings business	• Acquisitions of smaller brands • Emerging markets and expansion abroad

Key developments

- In, October 31, 2016 – Ajinomoto Co., Inc. entered into an agreement to acquire the trademarks. (“AGF”) and Jacobs DouweEgberts B.V. (“JDE”), AGF has been creating new categories in the coffee market with products such as Blendy Stick to continue to provide new value adapted to consumer needs.

Nissin Foods Holdings Co Ltd.

- Nissin Foods is a Japanese company with major business focus on instant noodles

Strength	Weakness	Opportunities
• Lower distribution costs and exclusive sale contracts with retailers • Worldwide presence of brand	• Tough competition from other brands and restaurants means limited market share • Marketing in other countries is not as efficient	• Align sale with marketing partners globally • Cost reduction by restructuring production system

Key Developments

- In Sept. 15, 2016 –Nissin Foods, announced a significant recipe change for its iconic Cup Noodles brand in the U.S. Nissin is taking a step forward in improving its nutritional makeup by reducing sodium, removing added MSG and removing artificial flavors

Data Analysis (Findings and Forecast)

Global Dehydrated Food Market

Figure 01: Global dehydrated food products market overview

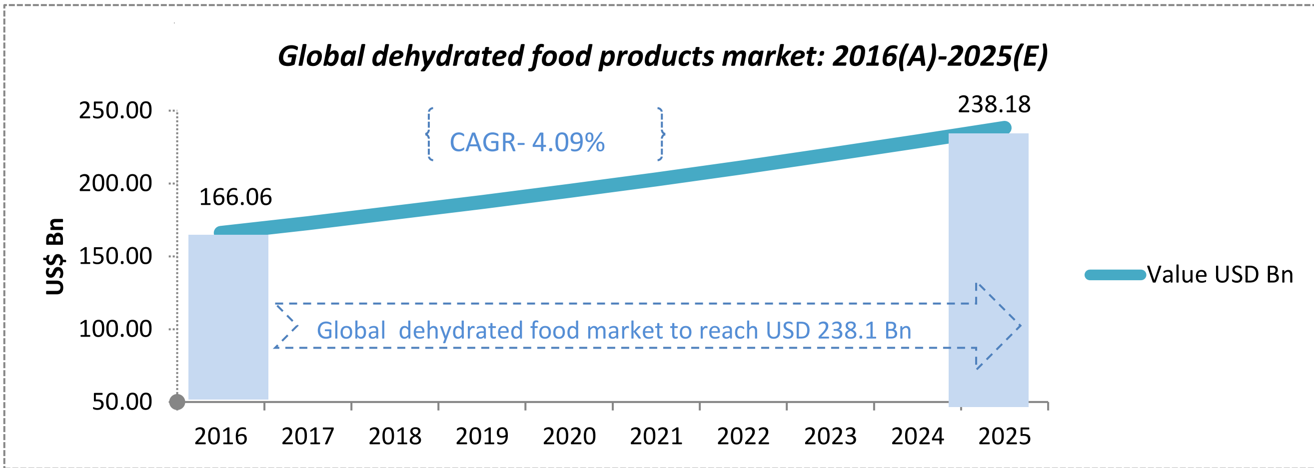
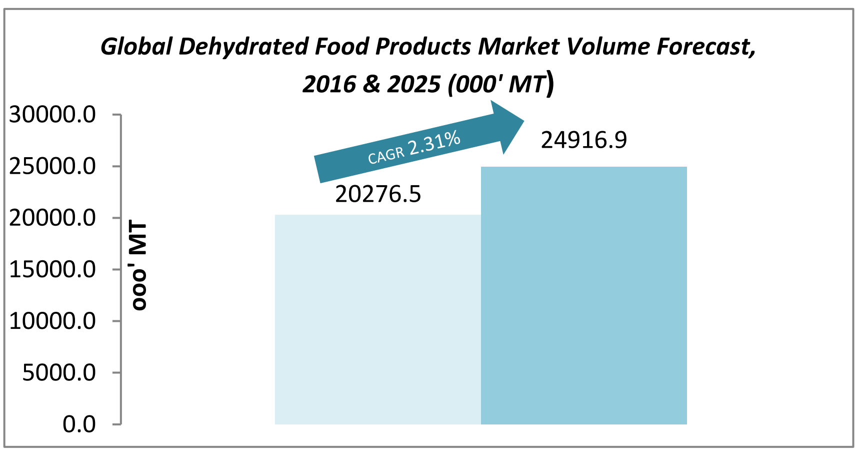


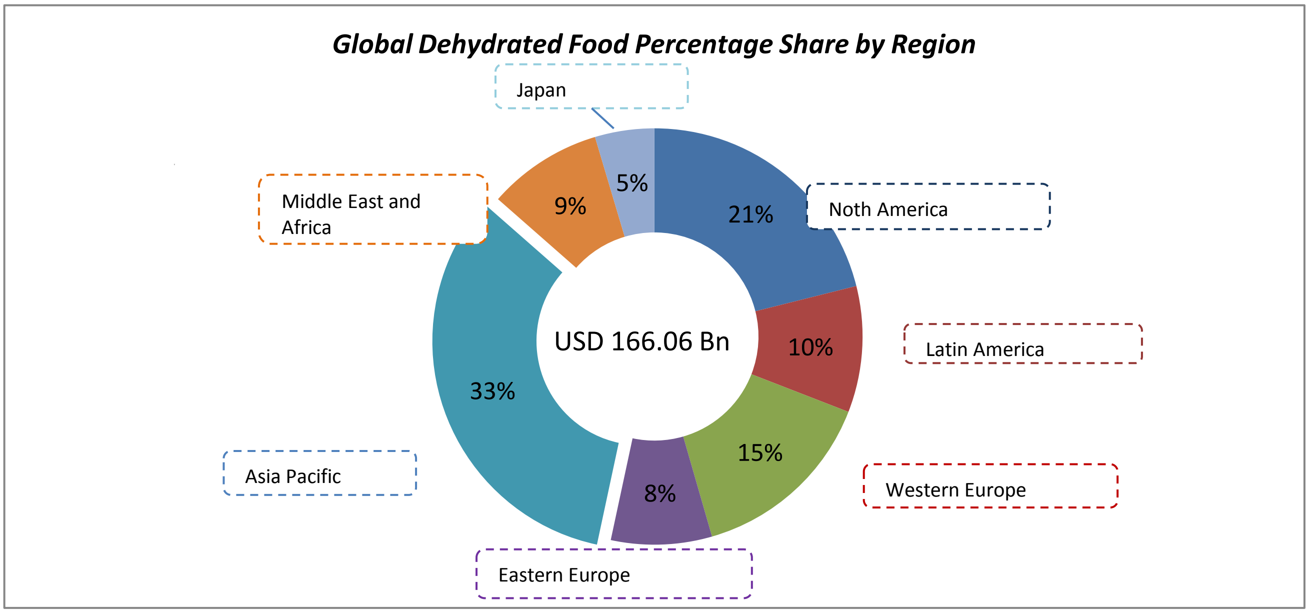
Figure above shows global dehydrated food market value US$ 166.06Bn in 2016 and is expected to grow at a CAGR of 4.09%. Global market is expected to reach to US$ 238.1Bn by 2025 largely driven by the demand for convenient food worldwide in order to match the fast pace lifestyle

Figure 02: Global dehydrated food products market volume forecast



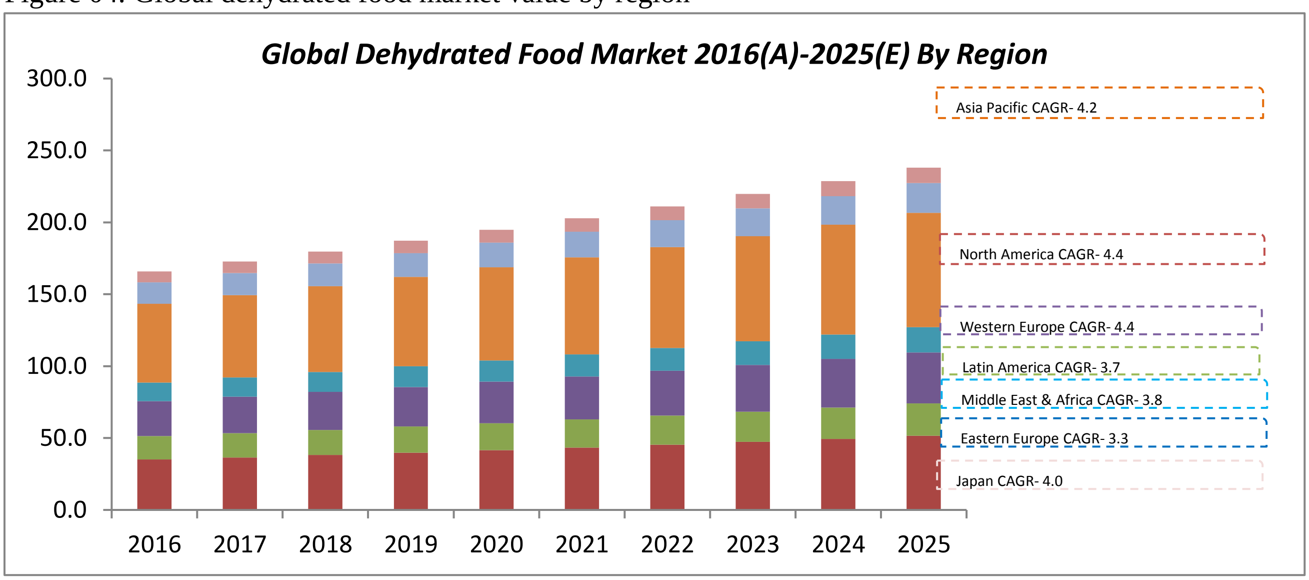
The above figure represents the global rise in volume of dehydrated food demand from 2016 to 2025. It is estimated the volume of global dehydrated food will reach 24,916.9 thousand metric tons by 2025 end representing a CARG of 2.31% during the forecast period. In 2016 the global dehydrated food market was 20,276.5 thousand metric tons.

Figure: 03: Global dehydrated food market value percentage share by region



The figure above represents the market share of respective regions, Asia Pacific being the largest market with 33% market share of global dehydrated food in terms of value followed by North America with 21% market share, the consumption of noodles being very high is Asia Pacific being the main reason for the high market share percentage.

Figure 04: Global dehydrated food market value by region



Above figure represents the global dehydrated market growth by region, the highest growth rate being witnessed in North America followed by Western Europe registering a CAGR of 4.46 and 4.40 respectively.

Figure 05: Global dehydrated food market value percentage by product type

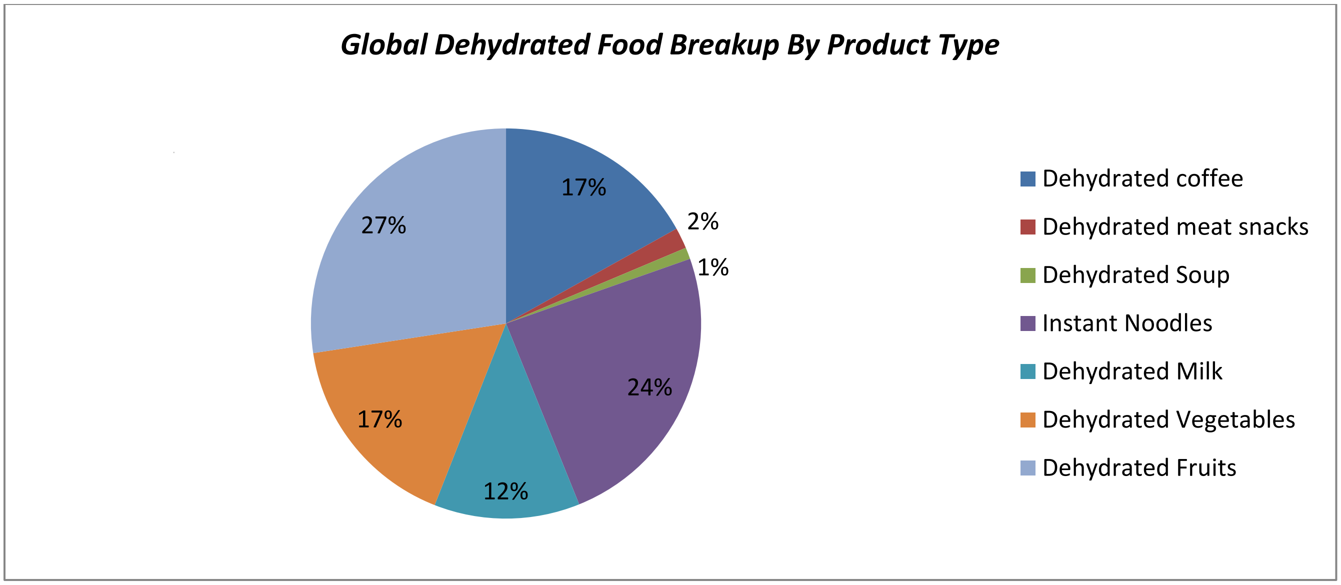
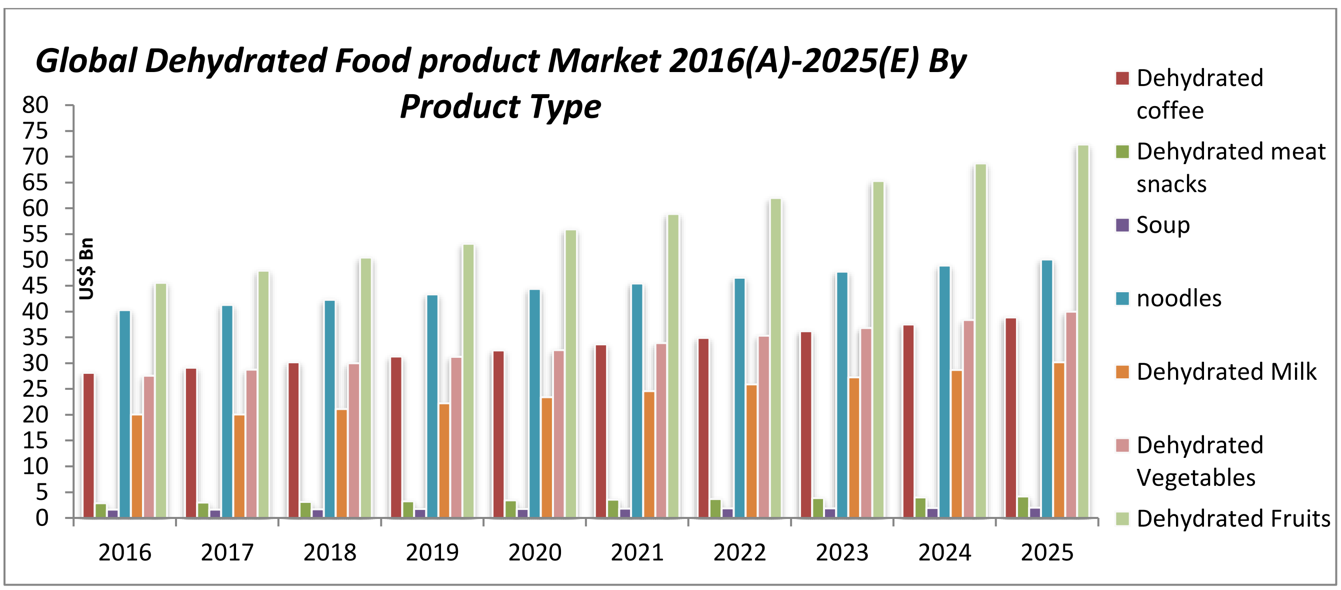


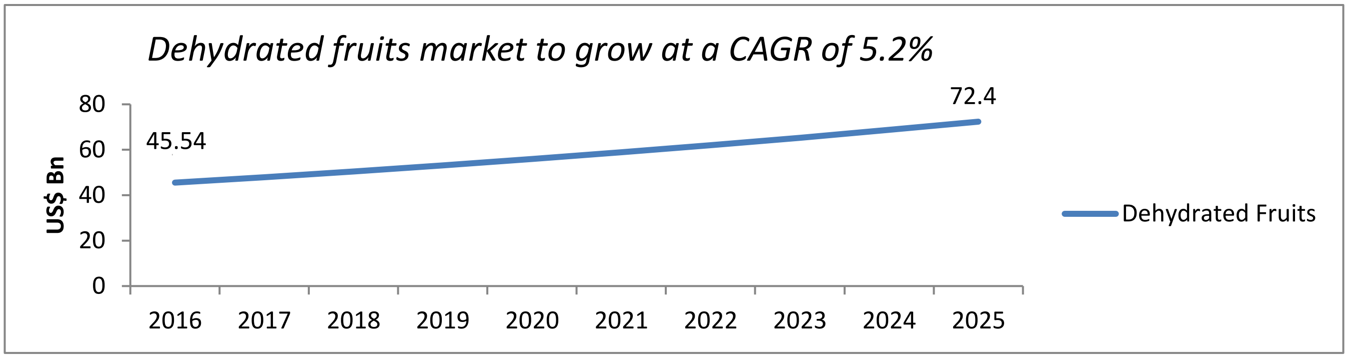
Figure 05 represents the market breakup by product type for dehydrated food; dehydrated fruits with 27% share of global share remain dominant mainly due to high demand of dehydrated fruits by food processing industries.

Figure 06: Global dehydrated food products market value by product type



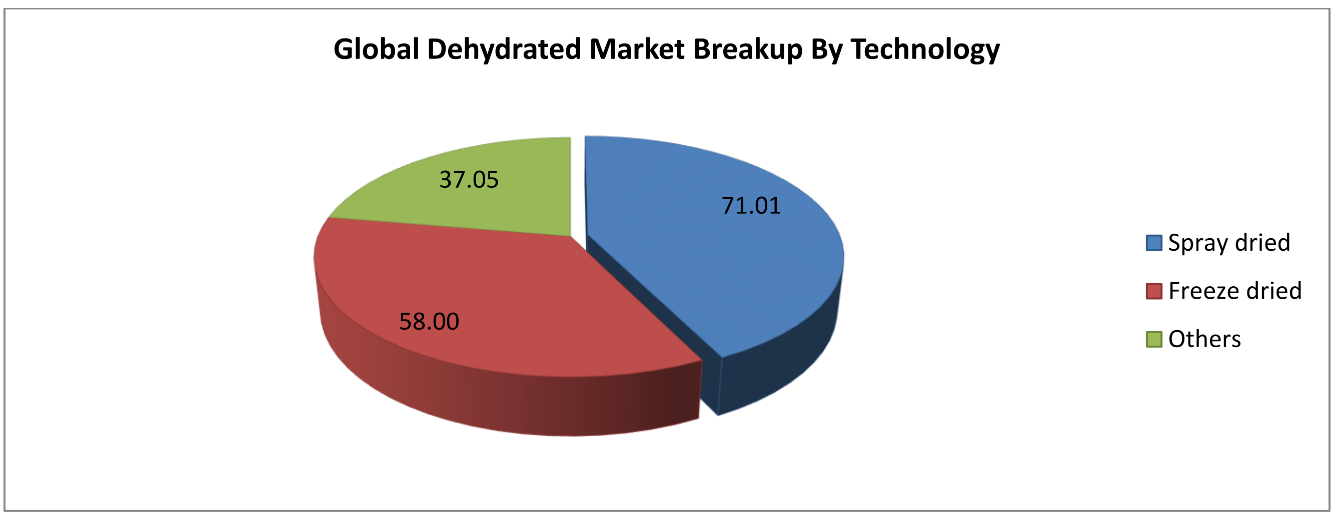
The global dehydrated food market is expected to witness high growth owing to the high demand of dehydrated meat snacks products in developed countries as a trend among young population. Companies such as Cargill Inc. dominating the market of meat snacks with its brand of Slim Jims (dehydrated jerky). The above figure represents the growth of various segments of dehydrated food.

Figure 07: Dehydrated Fruits Market growth, value US$ Bn



The figure above illustrates highest growth rate in dehydrated fruits segment, the market for dehydrated fruits was valued at US$ 45.5 Bn in 2016 and is expected to reach US$ 72.4 Bn by 2025 end registering a compound annual growth rate of 5.2% over the forecast period. Companies such as Kellogg's and Mars generating high demand by introduction of fruit based products.

Figure 08: Global dehydrated food market value share by technology type



The market is segmented with respect to technology trends in the global dehydrated market and the main processes used for preparation of dehydrated food are represented in figure 08, spray dried food being the most commonly used technology and accounting for approximately 71% of market share by value of dehydrated food prepared. This can be traced back to the fact that the process of spray drying is highly efficient and reduces wastage of food while being widely used in preparing fine powder form of food articles.

Figure 09: Global dehydrated food products market forecast by technology

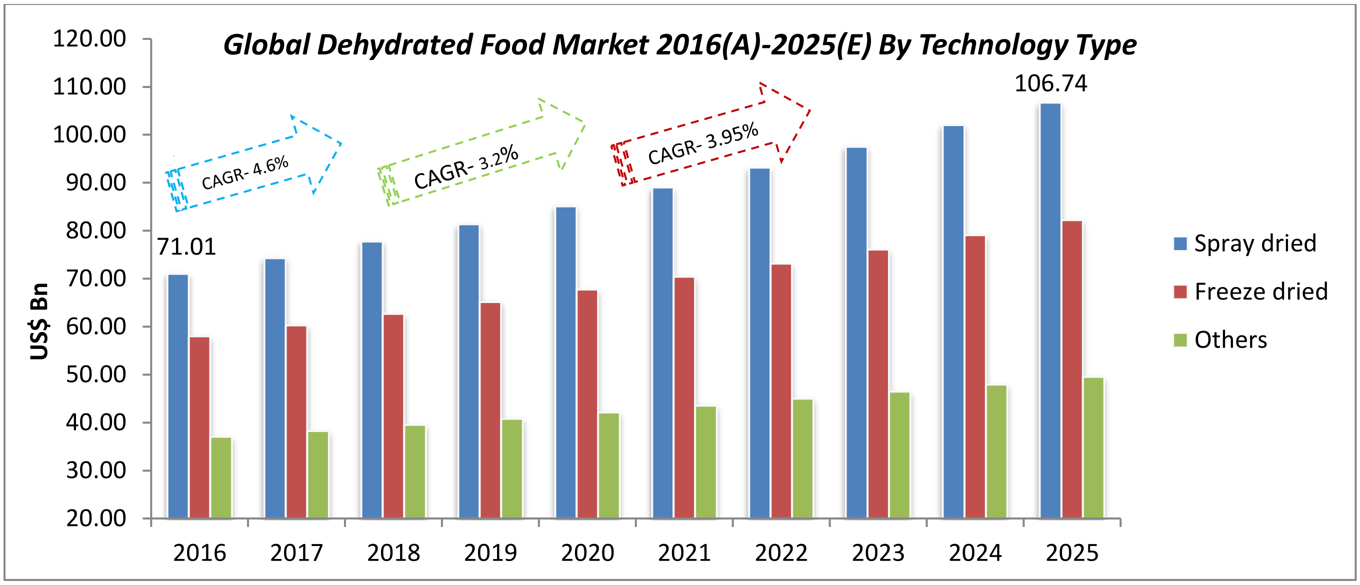
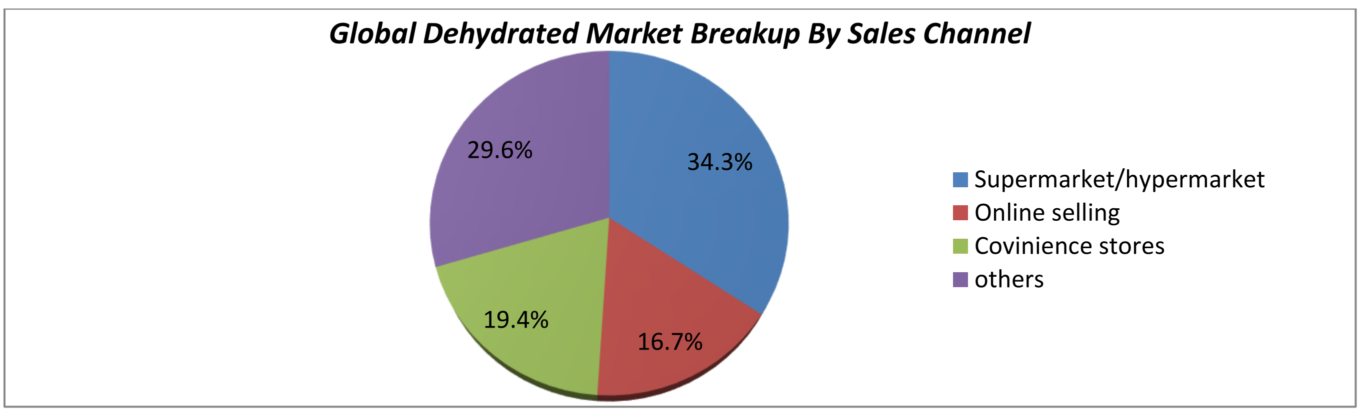


Figure above highlights the growth of dehydrated food products by the type of technology used, the market is estimated to grow for the spray dried dehydrated food products at a relatively higher CAGR of 4.6% over the forecast period. Valued at US$ 71.0 Bn in 2016 is anticipated to reach US$ 106.7 Bn by the end of 2025. The global freeze market is estimated to grow at a CAGR of 3.9% and the other technologies used in preparation of dehydrated food represents a growth rate of 3.2% during the forecast period.

Figure 10: Global dehydrated food market share percentage by sales channel



The above pie chart represents the global sales of dehydrated food products through various channels, the sales of dehydrated food being driven by high amount of consumers buying from supermarkets and hypermarkets and accounting for 34.3% of global sales from this sales channel. The other segment includes sales from neighborhood stores, and other local retail stores which account for approximately29.6% share.

North America dehydrated food market

Figure 11: North America dehydrated food market overview

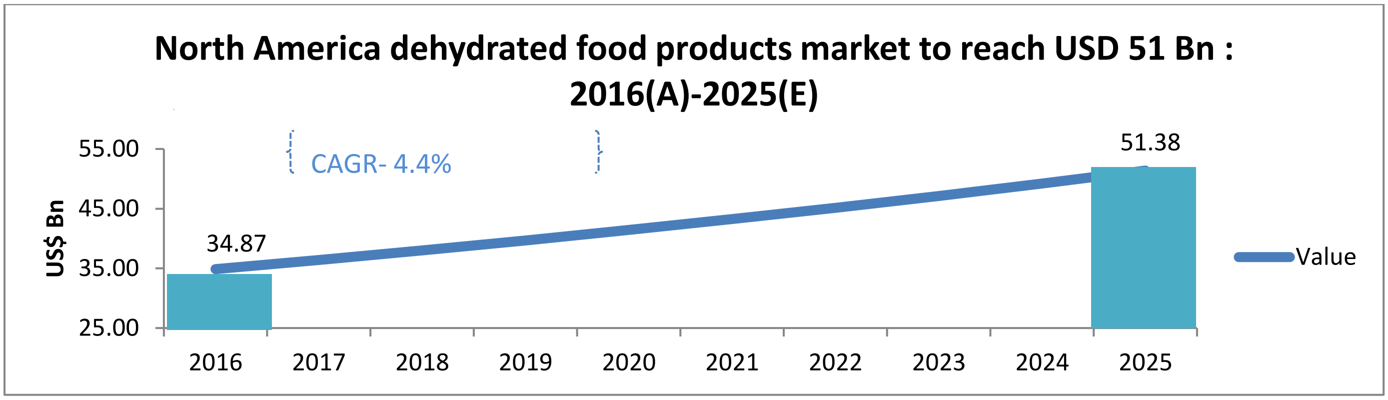
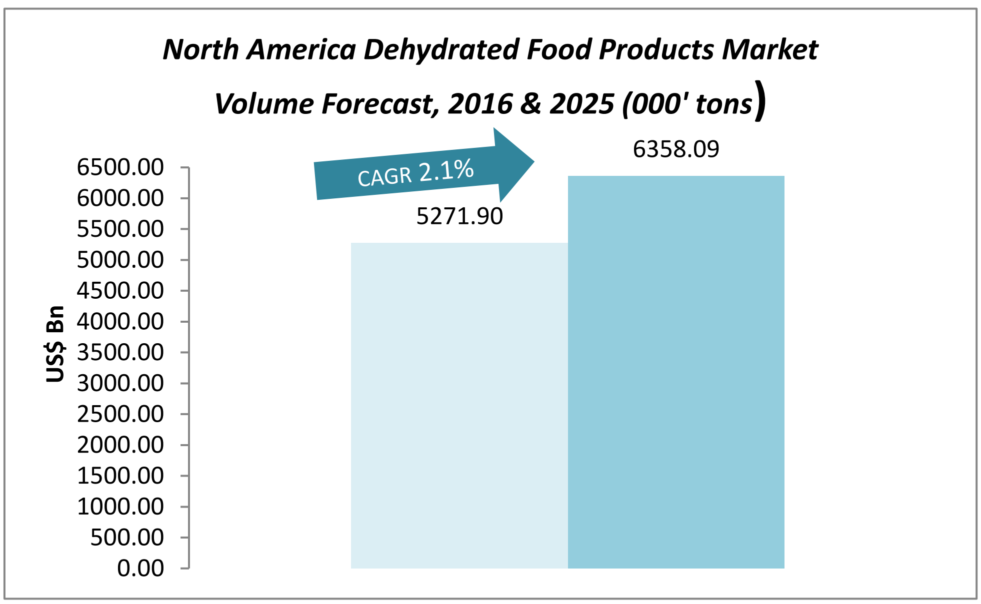


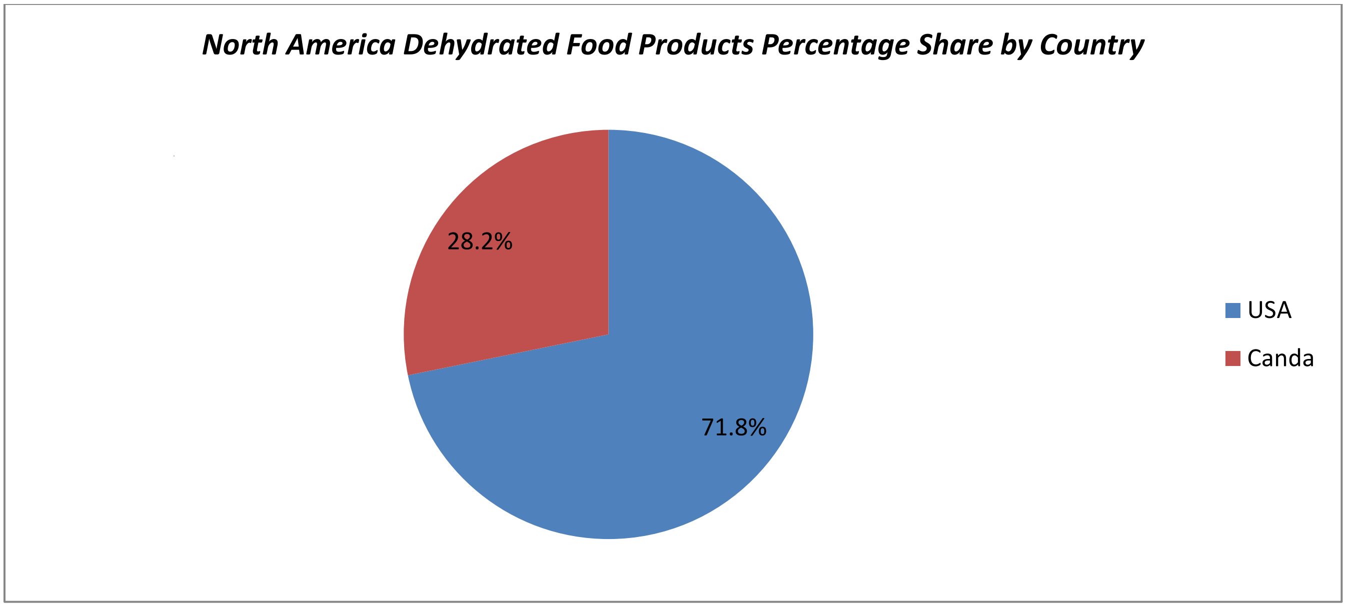
Figure above shows North America dehydrated food market value US$ 34.87 Bn in 2016 and is expected to grow at a CAGR of 4.4%. Global market is expected to reach to US$ 51.3 Bn by 2025. The current trend in food is well observed by the increasing sales of convenient food such as instant coffee, soup and dehydrated meat snacks among others.

Figure 12: North America dehydrated food products market volume



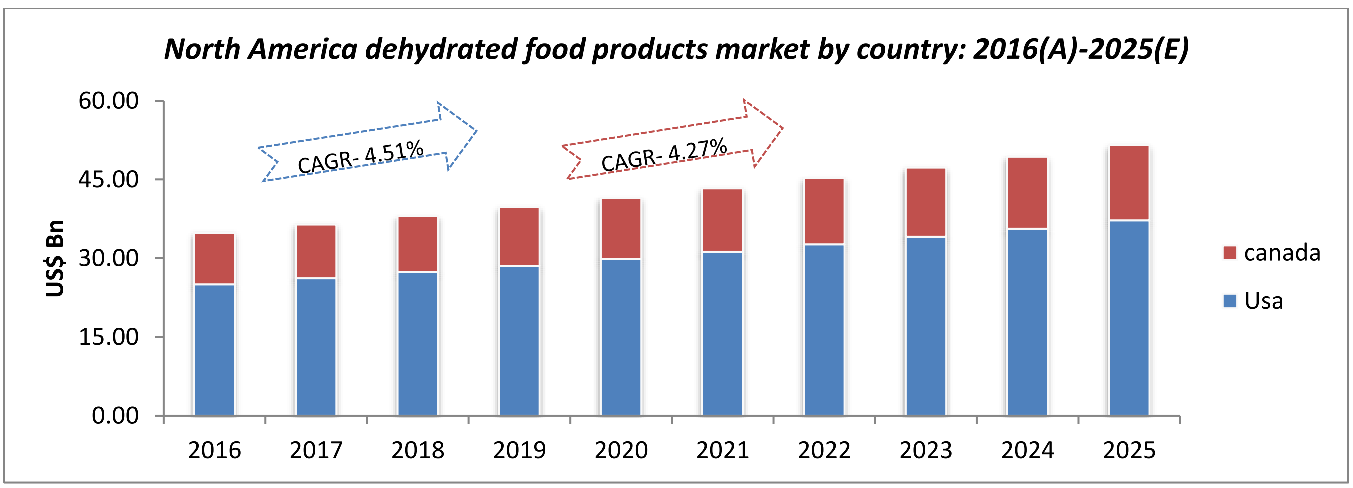
The above figure represents the rise in volume of dehydrated food demand from 2016 to 2025 in North America. It is estimated the volume of global dehydrated food will reach 6358.0 thousand metric tons by 2025 end representing a CARG of 2.1% during the forecast period. In 2016 the North America dehydrated food market was 5271.9 thousand metric tons.

Figure 13: North America dehydrated food products market share percentage by country



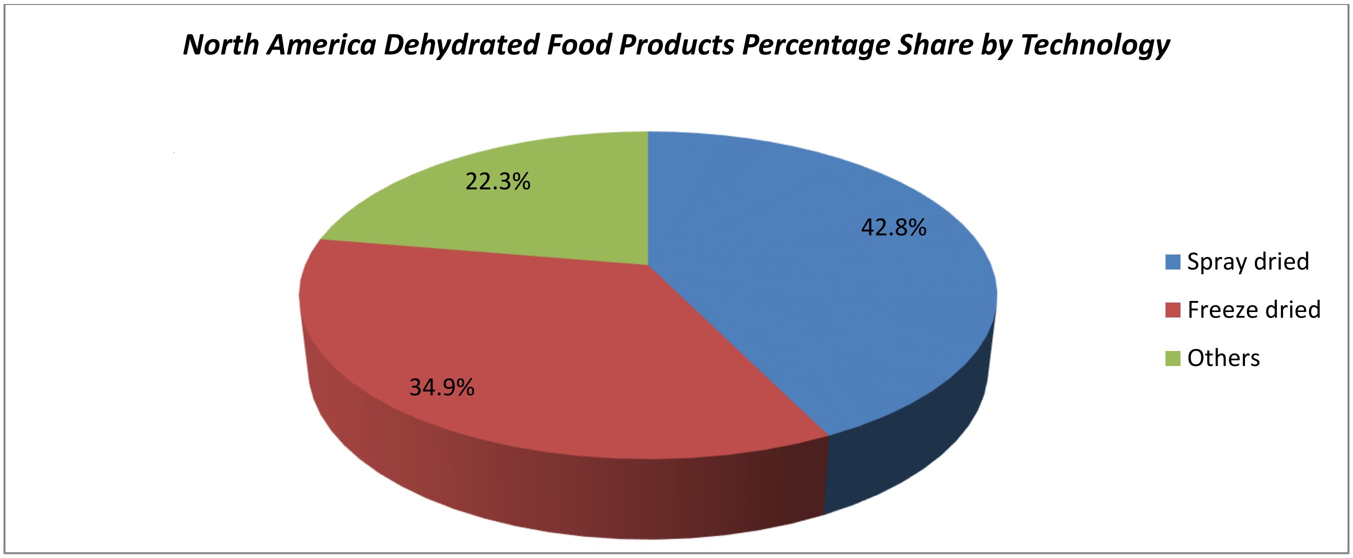
The figure above represents the market share of North American countries namely U.S. and Canada. U.S being the largest market with 71.8% market share of North American dehydrated food in terms of value. This high share of market being attributed to the wide use of dehydrated food in most of food preparation in U.S whereas high organic and fresh food demand in Canada has created low demand for dehydrated food

Figure 14: North America dehydrated food products market value by country



Above figure represents the North America dehydrated market growth by country, the highest growth rate being witnessed in U.S registering a CAGR of 4.56 increasing its calue from US$ 25.04 Bn in 2016 to US$ 37.24 Bn by 2025

Figure 15: North America dehydrated food market value share percentage by technology



On the basis of technology used the North American dehydrated food products market is dominated by spray dried products with a market share of 42.8% by value. The freeze dried and the others segment make up for 34.9% and 22.3 % respectively.

Figure 16: North America dehydrated food market value by technology

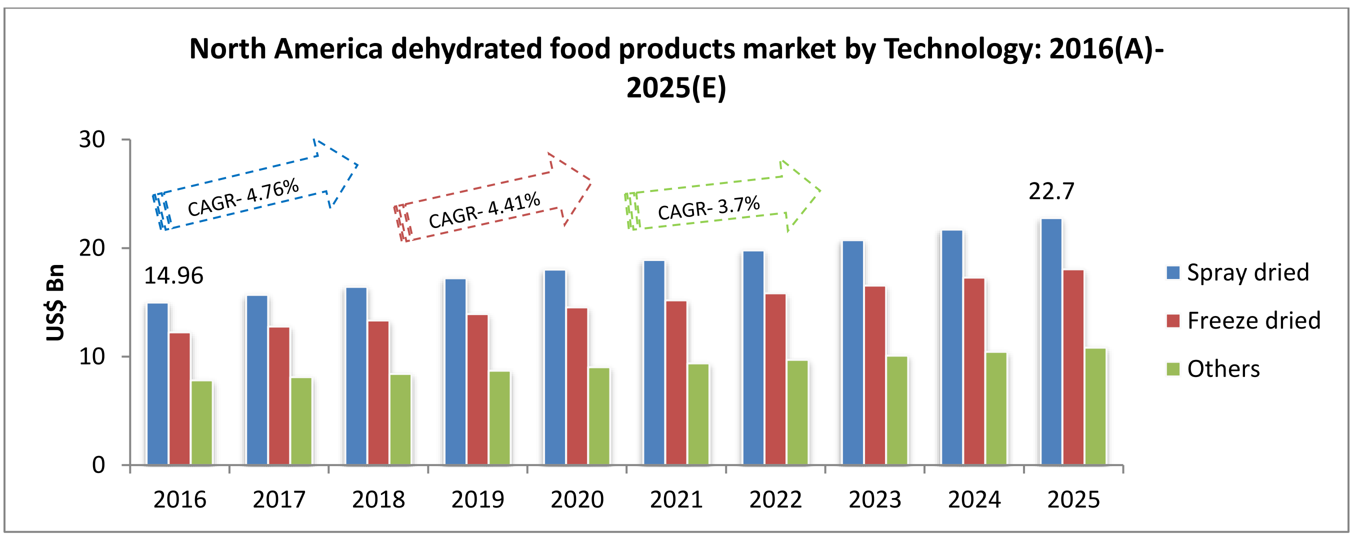
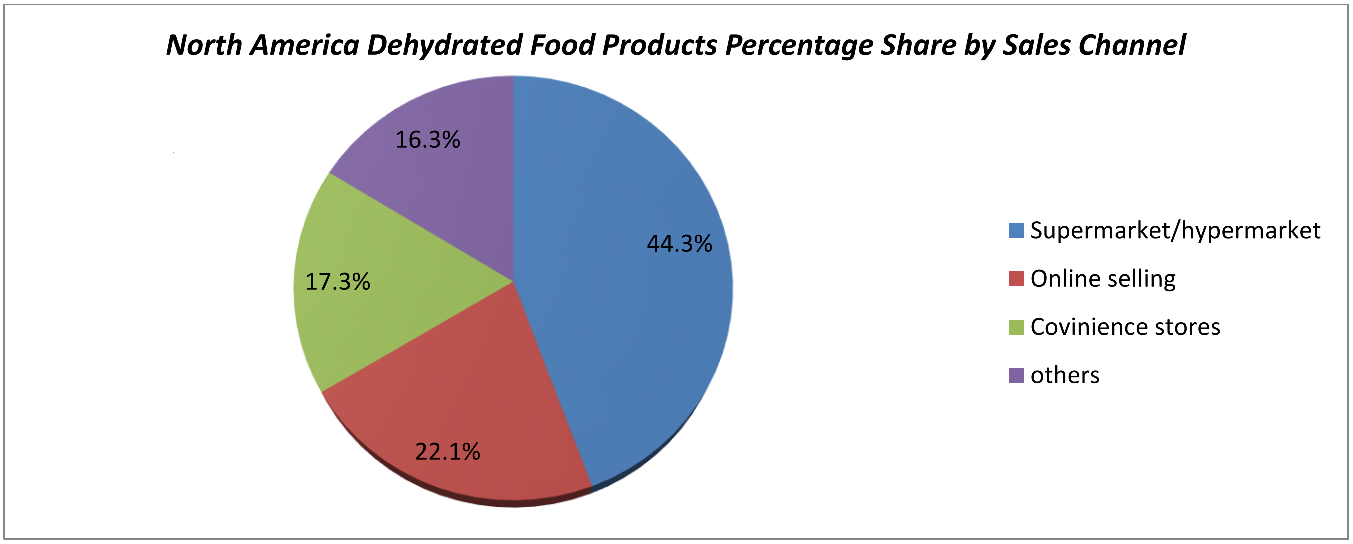


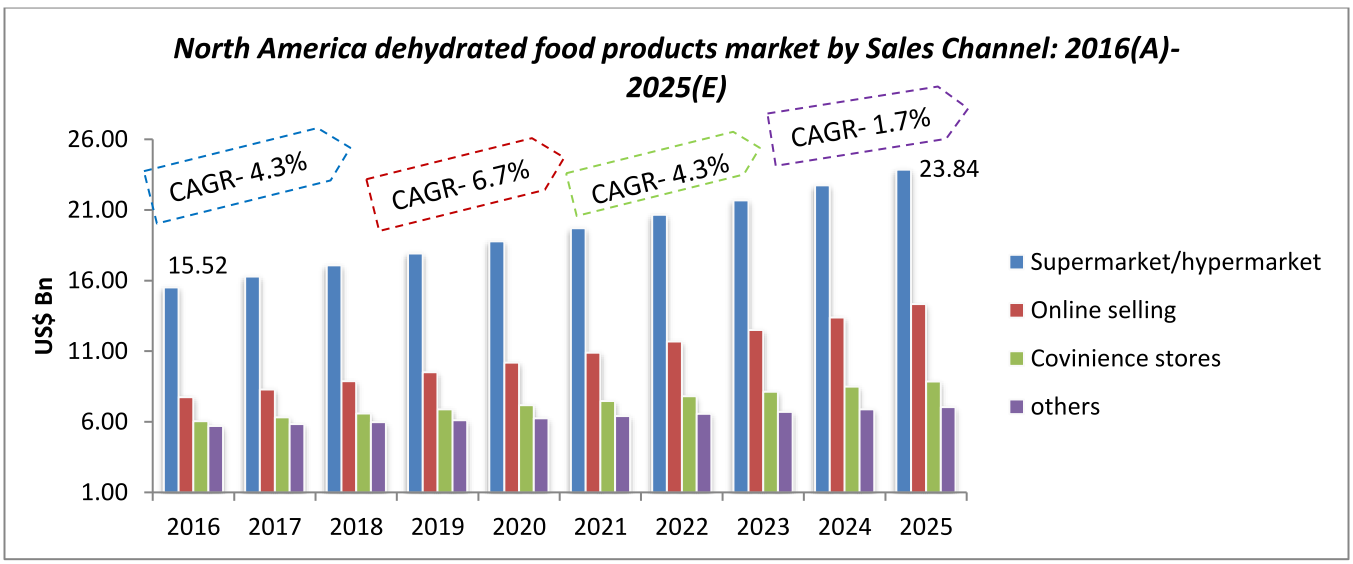
Figure above highlights the growth of dehydrated food products by the type of technology used, the market is estimated to grow for the spray dried dehydrated food products at a relatively higher CAGR of 4.76% over the forecast period. Valued at US$ 14.96 Bn in 2016 is anticipated to reach US$ 22.7 Bn by the end of 2025. The global freeze market is estimated to grow at a CAGR of 4.41% and the other technologies used in preparation of dehydrated food represents a growth rate of 3.7% during the forecast period.

Figure 17: North America Dehydrated Food Products Percentage Share by Sales Channel



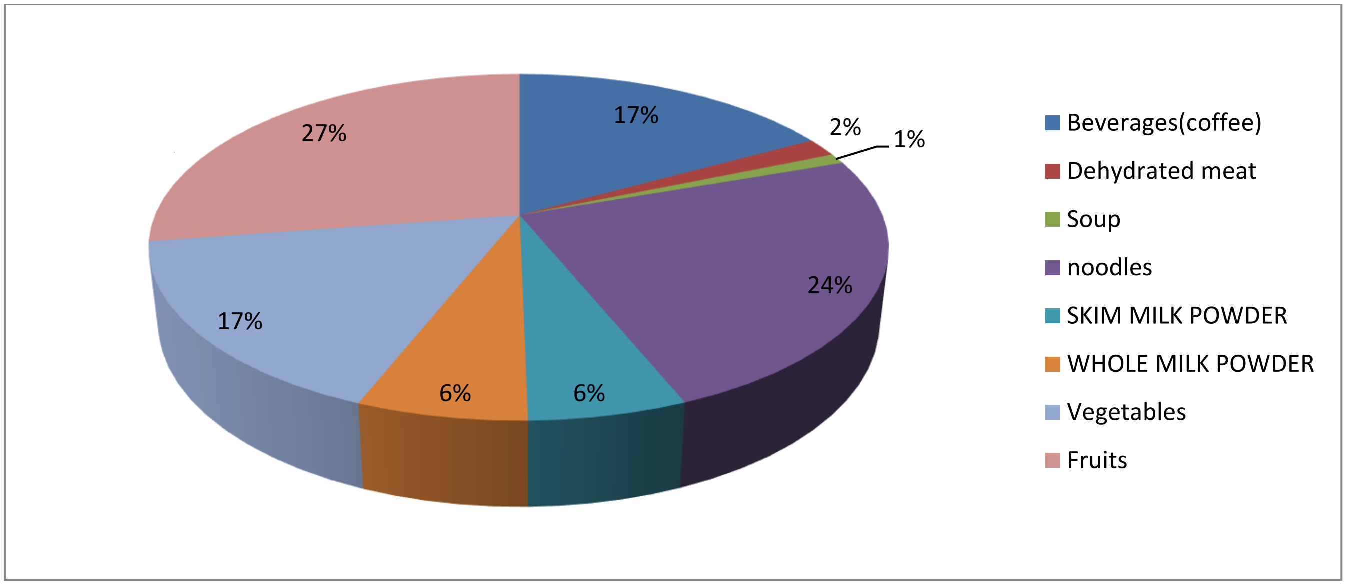
The above pie chart represents North America sales of dehydrated food products through various channels, the sales of dehydrated food being driven by high amount of consumers buying from supermarkets and hypermarkets and accounting for 44.3% of global sales from this sales channel. Online retail accounting for approximately 22.1% share.

Figure 18: North America dehydrated food products market value by Sales Channel



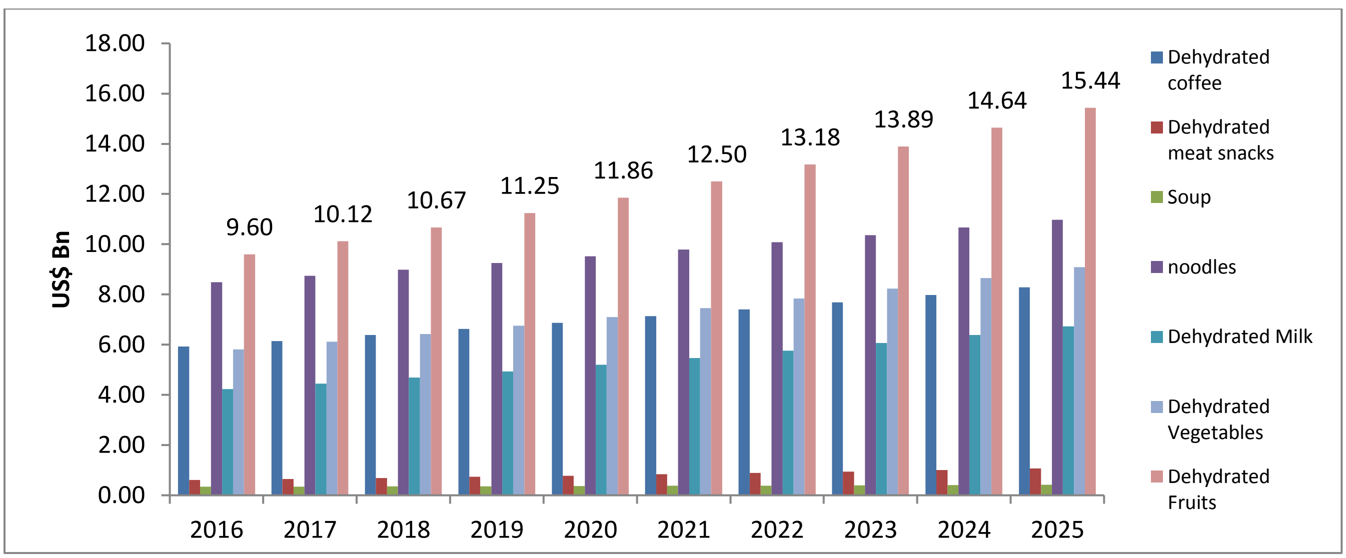
Above figure represents North America dehydrated food products market by sales channel, revenue generated from supermarkets/hypermarkets is estimated to grow from US$ 15.5 Bn in 2016 to US$ 23.8 Bn in 2025 reflecting a CAGR of 4.3% over the forecast period.

Figure 19: North America dehydrated food market value share by product type



The North American dehydrated food market is expected to witness high growth owing to the high demand of dehydrated fruit products The above figure represents the share of various segments of dehydrated food. With dehydrated fruits accounting for 27% of value share and instant noodles accounting for 24% share in the North American dehydrated food market.

Figure 20: North America dehydrated food products market by Product Type: 2016(A)-2025(E)



Above figure represents the North American dehydrated food product growth from 2016 to 2025, dehydrated fruits accounted for US$ 9.6 Bn and are estimated to reach US$ 15.4 Bn by 2025 end. However, the highest growth rate being registered by dehydrated meat snacks with a CAGR of 6.5%

Latin America Dehydrated Food Market

Figure 21: Latin America dehydrated food products market overview

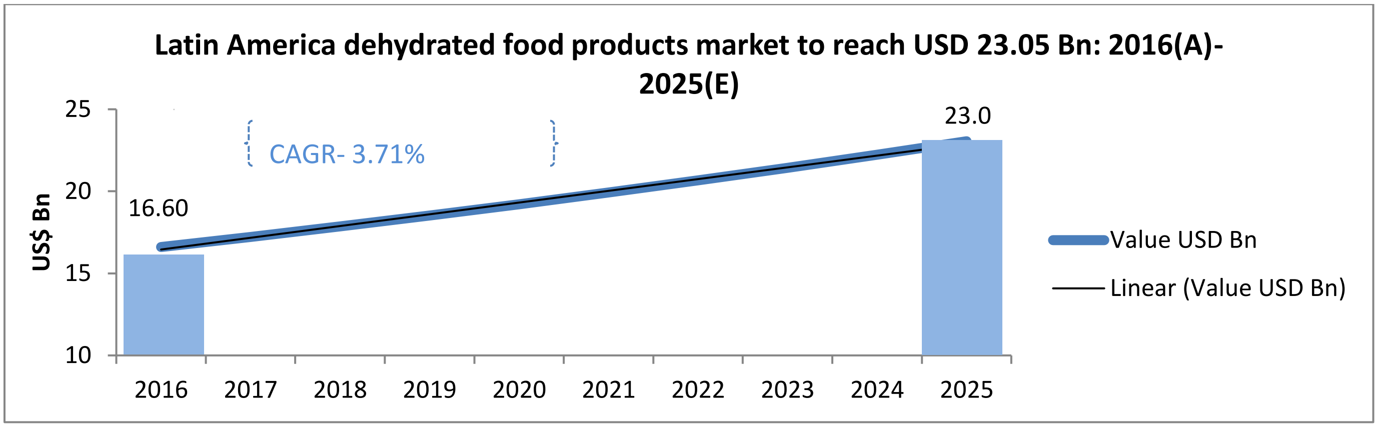
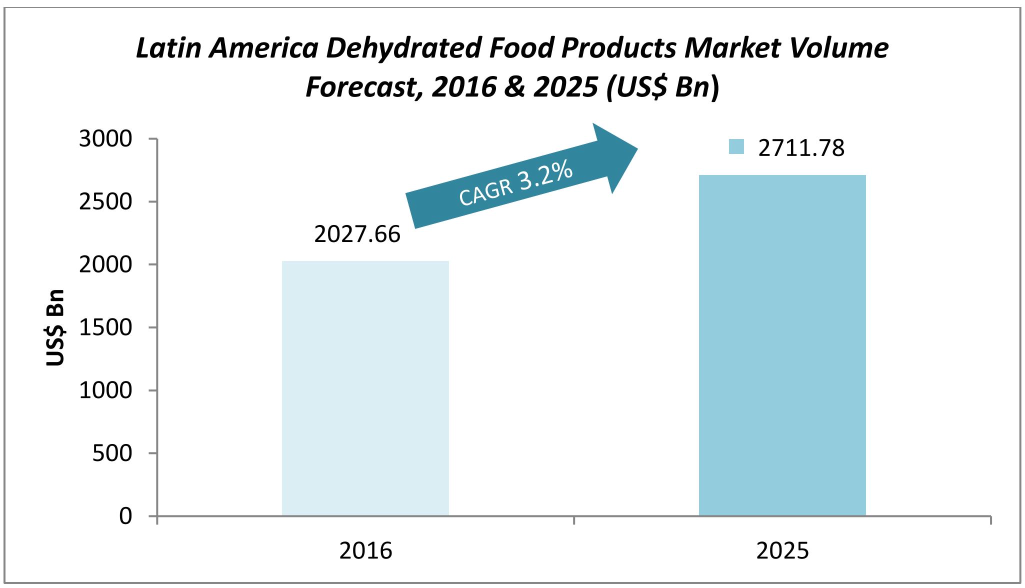


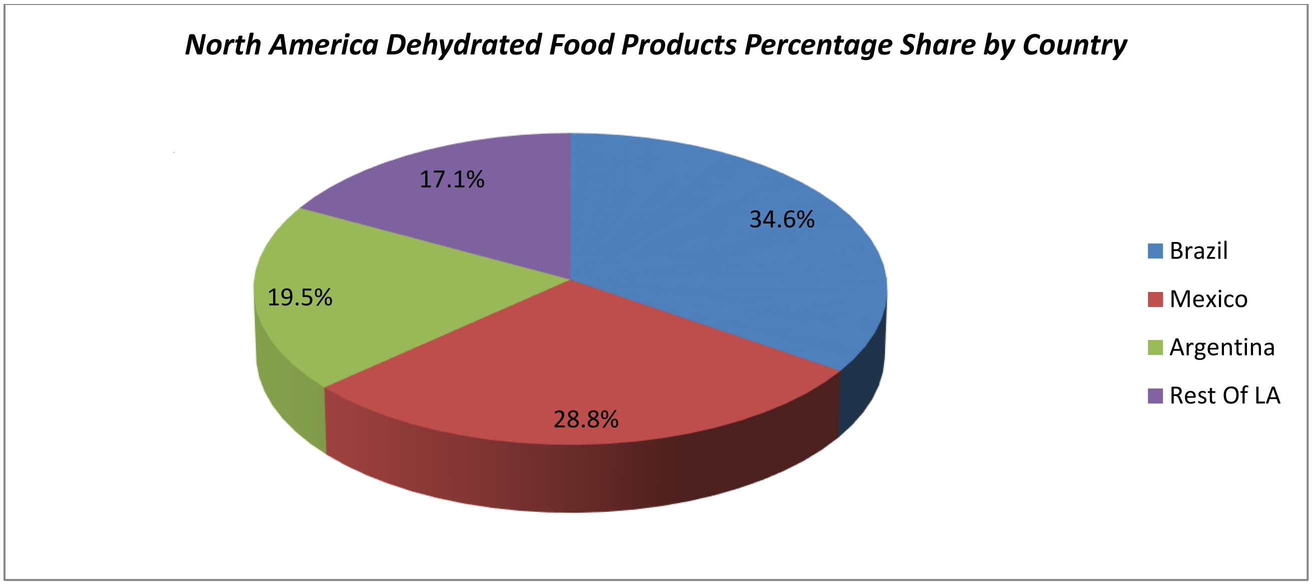
Figure above shows Latin America dehydrated food market value US$ 16.6 Bn in 2016 and is expected to grow at a CAGR of 3.7%. The market is expected to reach to US$ 23.0 Bn by 2025. The driving factors for this growth remain the high consumption of instant soups and instant coffee.

Figure 22: Latin America dehydrated food products volume



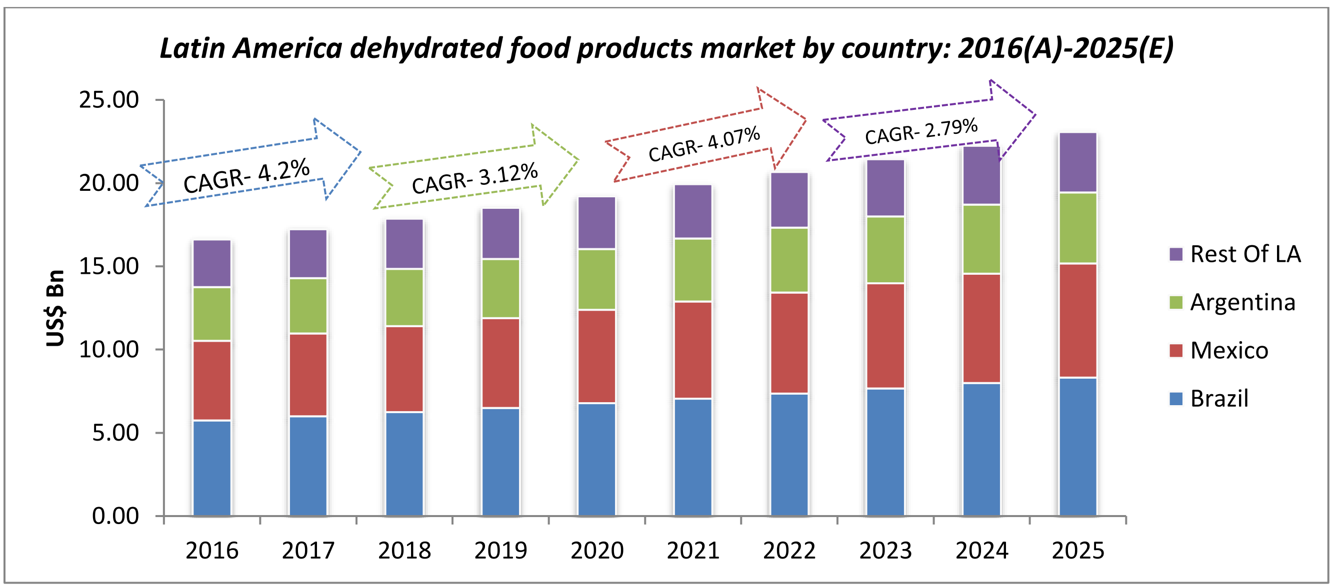
The above figure represents the rise in volume of dehydrated food demand from 2016 to 2025 in Latin America. It is estimated the volume of Latin American dehydrated food will reach 2711.7 thousand metric tons by 2025 end representing a CARG of 3.2% during the forecast period. In 2016 the Latin America dehydrated food market was 2027.6 thousand metric tons.

Figure 23: North America Dehydrated Food Products Percentage Share by Country



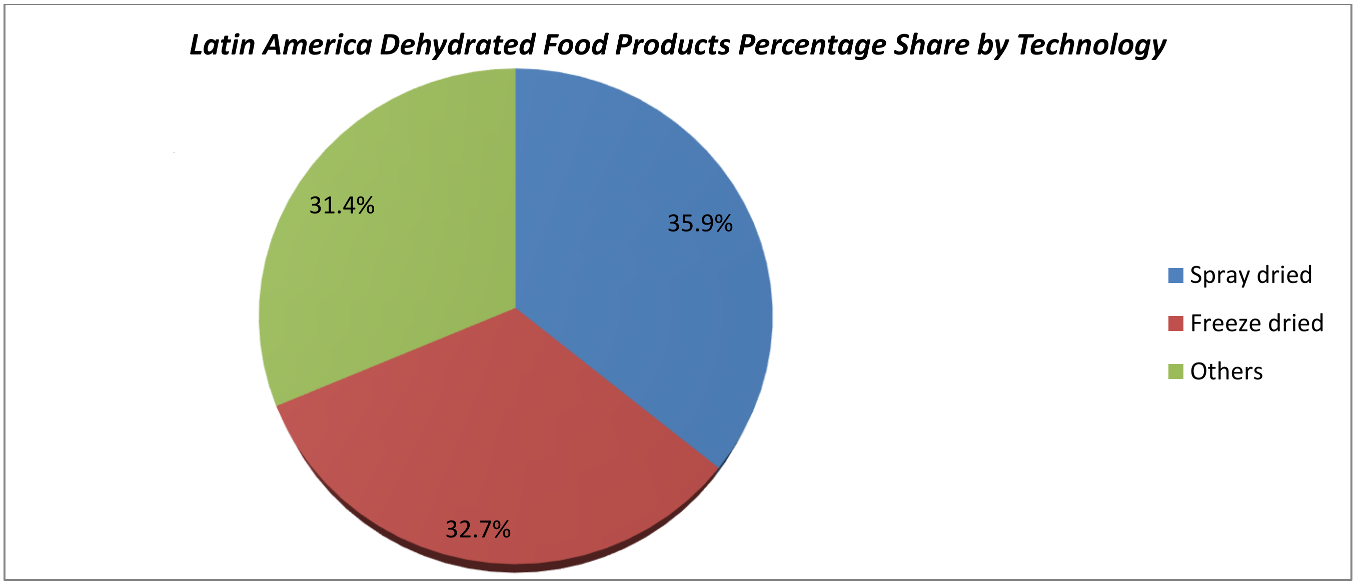
The figure above represents the market share of Latin American countries namely Brazil, Mexico, Argentina. Brazil being the largest market with 34.6% market share of Latin America dehydrated food in terms of value. Mexico with a value share percentage of 28.8 % and Argentina 19.5%.

Figure 24: Latin America dehydrated food products market by country: 2016(A)-2025(E)



Above figure represents the Latin America dehydrated market growth by country, the highest growth rate being witnessed in Brazil registering a CAGR of 4.2%, followed by Mexico with a CAGR of 4.0% over the forecast period

Figure 25: Latin America Dehydrated Food Products Percentage Share by Technology



On the basis of technology used the Latin American dehydrated food products market is dominated by spray dried products with a market share of 35.9% by value. The freeze dried and the others segment make up for 32.7% and 31.4 % respectively.

Figure 26: Latin America dehydrated food products market by Technology: 2016(A)-2025(E)

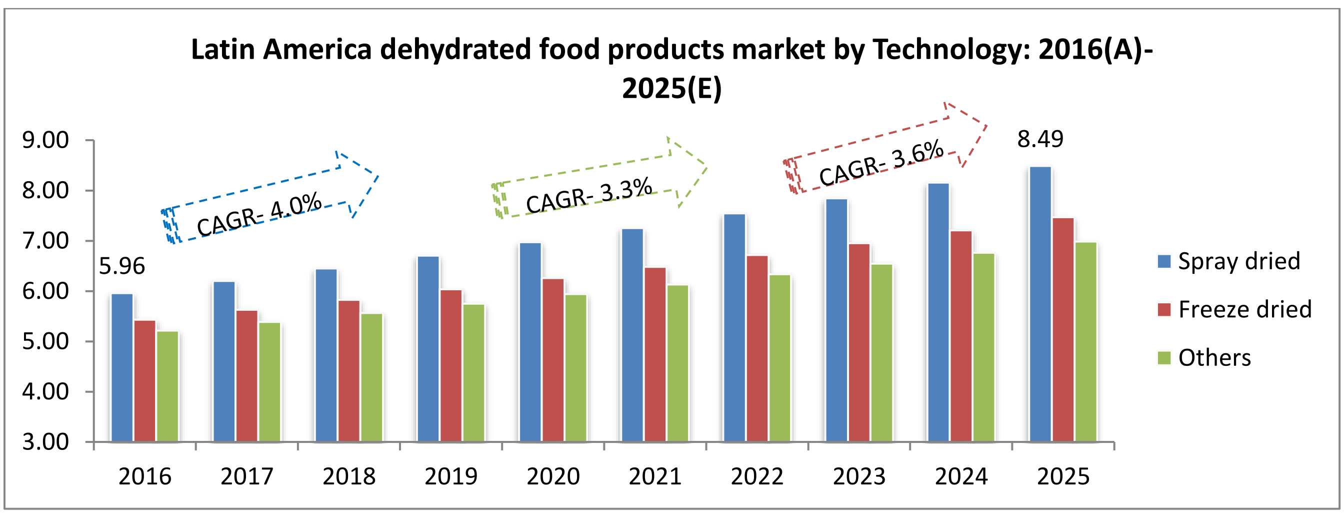
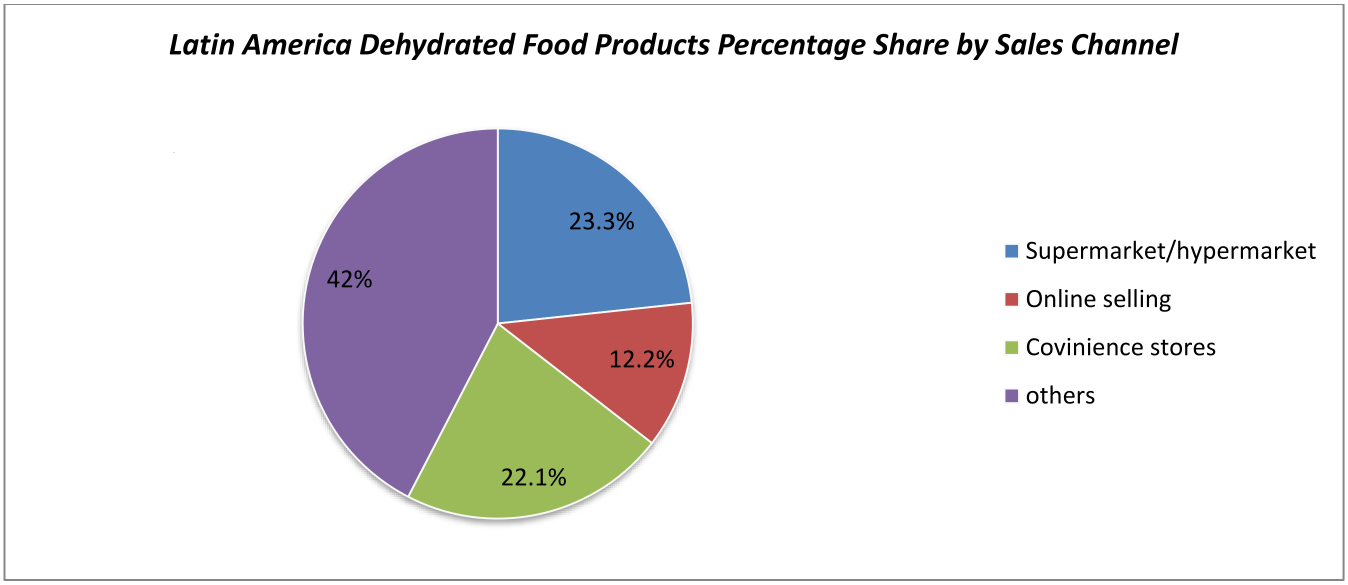


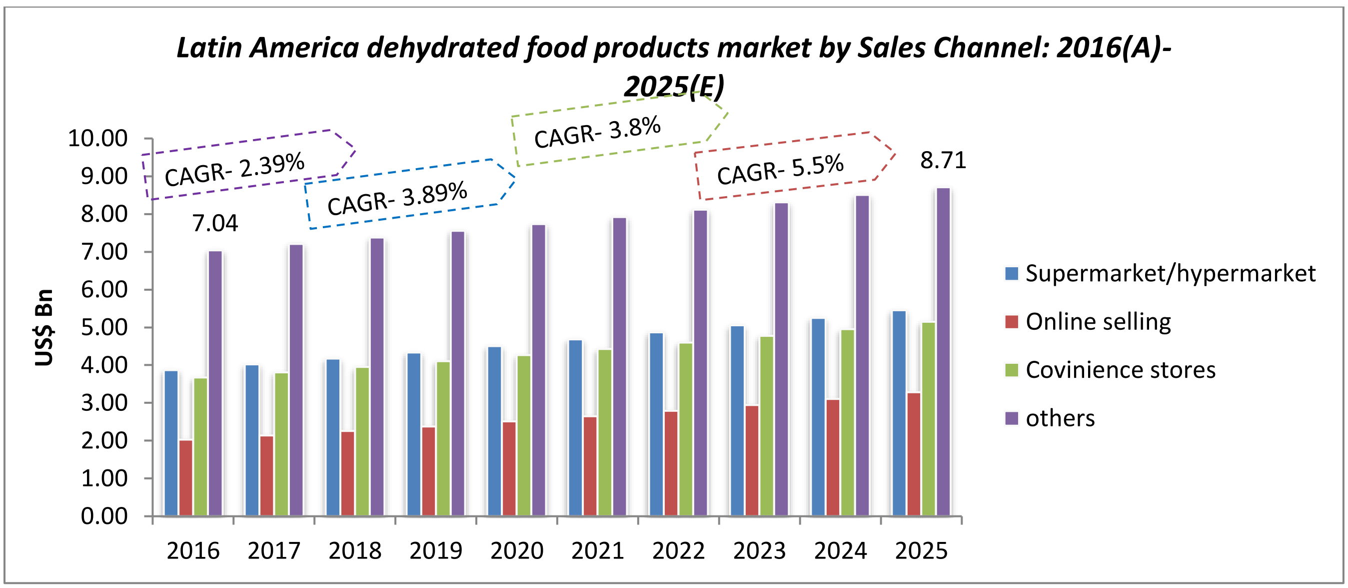
Figure above highlights the growth of dehydrated food products by the type of technology used, the market is estimated to grow for the spray dried dehydrated food products at a relatively higher CAGR of 4.0% over the forecast period. Valued at US$ 5.96 Bn in 2016 is anticipated to reach US$ 8.49 Bn by the end of 2025. The freeze market is estimated to grow at a CAGR of 3.6% and the other technologies used in preparation of dehydrated food represents a growth rate of 3.6% during the forecast period.

Figure 27: Latin America Dehydrated Food Products Percentage Share by Sales Channel



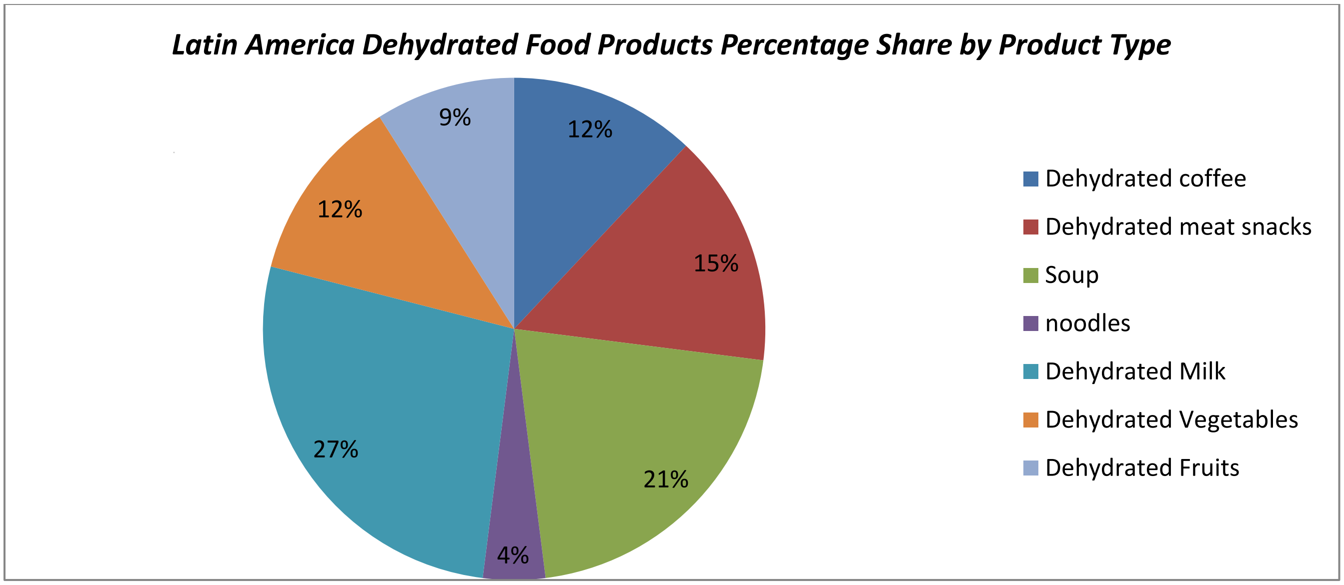
The above pie chart represents Latin America sales of dehydrated food products through various channels, the sales of dehydrated food being driven by high amount of consumers buying from other segments of retail and convenience stores accounting for 42% and 22% respectively of sales from this sales channel.

Figure 28: Latin America dehydrated food products market by Sales Channel: 2016(A)-2025(E)



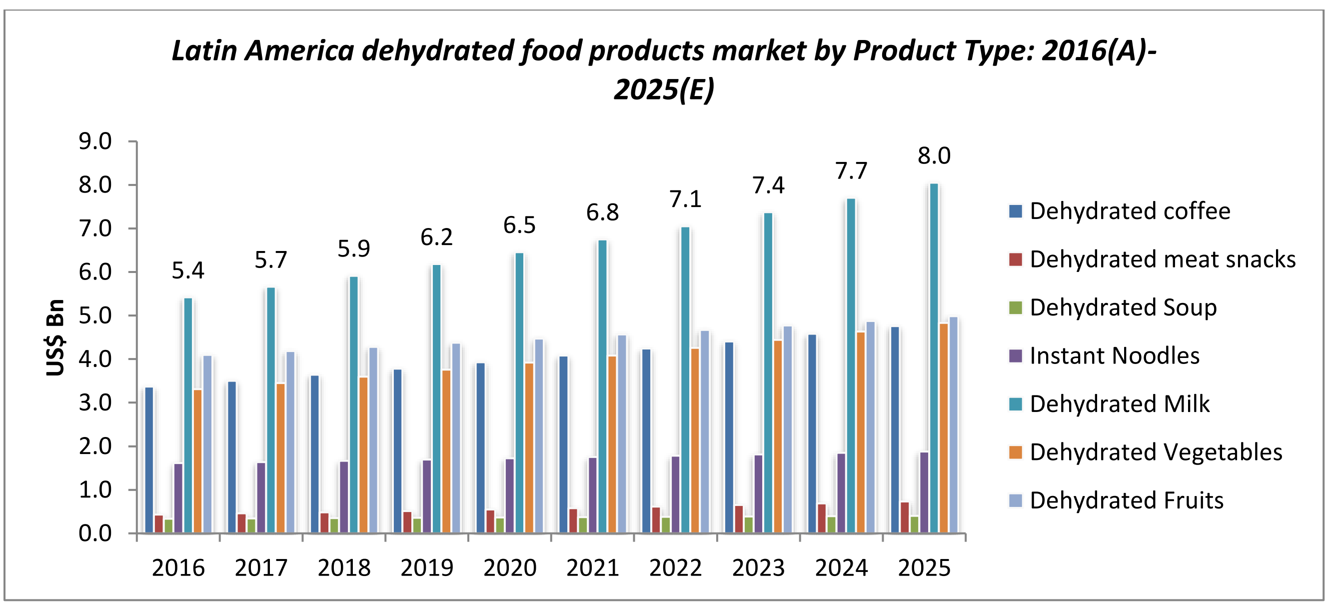
Above figure represents Latin America dehydrated food products market by sales channel, revenue generated from others segment is estimated to grow from US$ 7.04 Bn in 2016 to US$ 8.7Bn in 2025 reflecting a CAGR of 2.3% however the highest growth rate being online retail with 5.5%.

Figure 29: Latin America Dehydrated Food Products Percentage Share by Product Type



The Latin American dehydrated food market is expected to witness high growth owing to the high demand of dehydrated fruit products The above figure represents the share of various segments of dehydrated food. With dehydrated milk accounting for 27% of value share and instant soup accounting for 21% share in the Latin American dehydrated food market.

Figure 30: Latin America dehydrated food products market by Product Type: 2016(A)-2025(E)



Above figure represents the Latin American dehydrated food product growth from 2016 to 2025, dehydrated milk accounted for US$ 5.4 Bn and is estimated to reach US$ 5.4 Bn by 2025 end. The highest growth rate being registered by dehydrated milk with a CAGR of 4.5%

Western Europe dehydrated food products market

Figure 31: Western Europe dehydrated food market overview

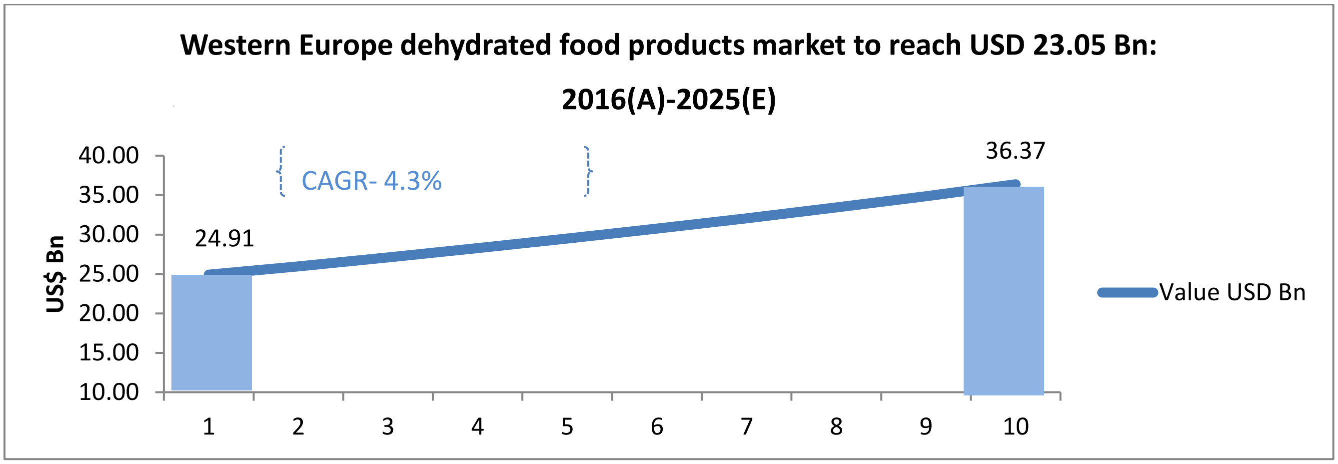
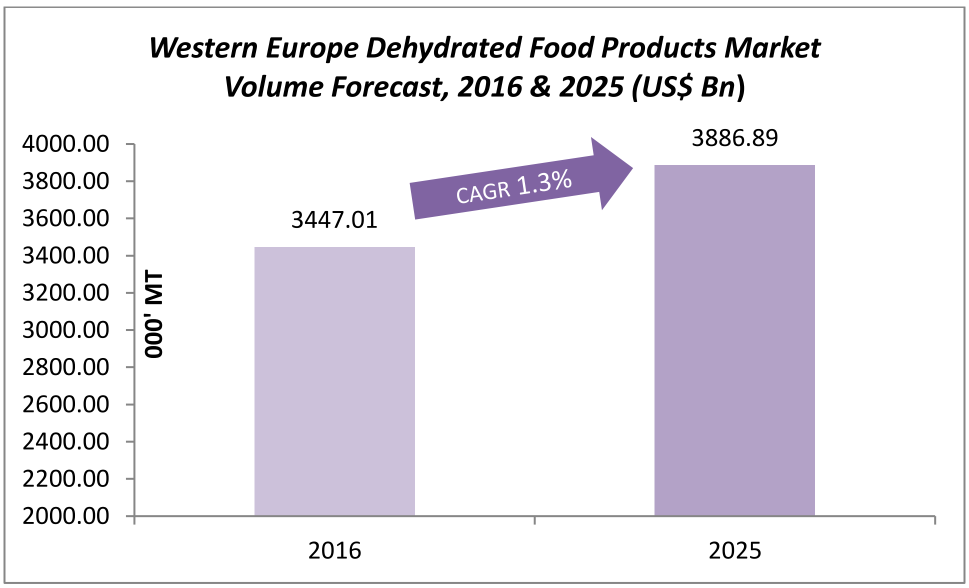


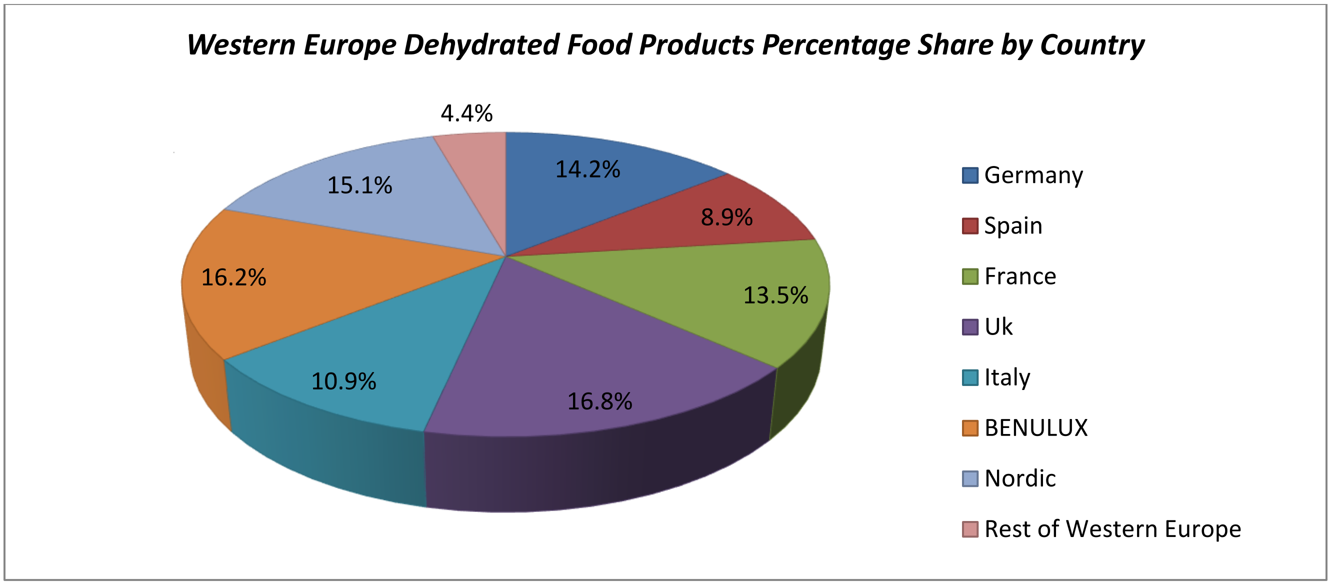
Figure above shows Western Europe dehydrated food market value US$ 24.9 Bn in 2016 and is expected to grow at a CAGR of 4.3%. The market is expected to reach to US$ 36.3 Bn by 2025. The driving factors for this growth remain the extensive use of dehydrated fruits and vegetables.

Figure 32: Western Europe Dehydrated Food Products Market Volume Forecast, 2016 & 2025 (US$ Bn)



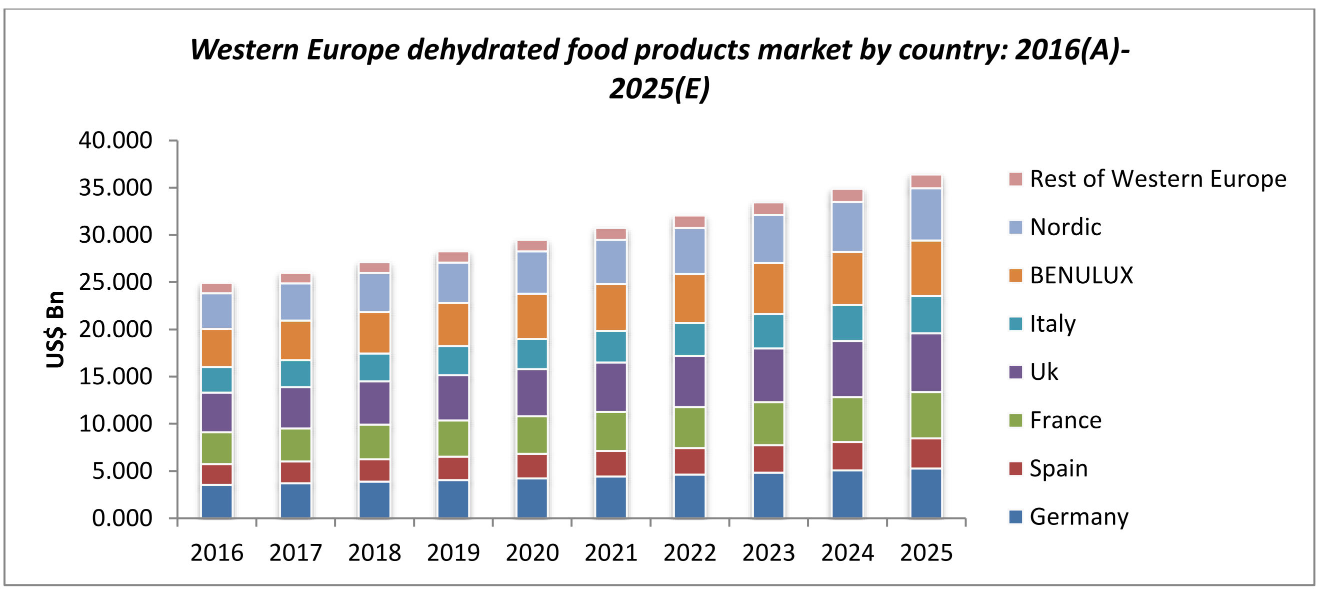
The above figure represents the rise in volume of dehydrated food demand from 2016 to 2025 in Western Europe. It is estimated the volume of Western Europe dehydrated food will reach 3886.89 thousand metric tons by 2025 end representing a CARG of 1.3% during the forecast period. In 2016 the Western European dehydrated food market was 3447.0 thousand metric tons.

Figure 33: Western Europe Dehydrated Food Products Percentage Share by Country



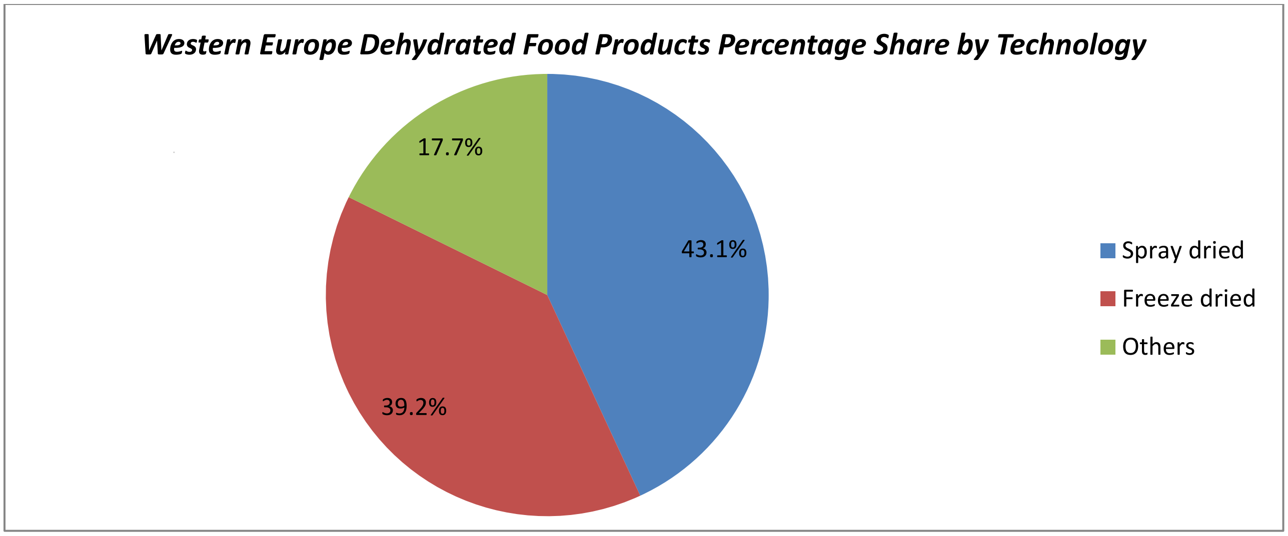
The figure above represents the market share of Western Europe countries namely Germany, Spain, France, U.K., Italy, BENULUX, NORDIC and Rest of Western Europe. U.K. being the largest market with 16.8% market share of Western Europe dehydrated food in terms of value. BENULUX with a value share percentage of 16.2 % and Germany14.2%

Figure 34: Western Europe dehydrated food products market by country: 2016(A)-2025(E)



Above figure represents the Western Europe dehydrated market growth by country, the highest growth rate being witnessed in Germany registering a CAGR of 4.5%, followed by U.K with a CAGR of 4.4% over the forecast period

Figure 35: Western Europe Dehydrated Food Products Percentage Share by Technology



On the basis of technology used the Western Europe dehydrated food products market is dominated by spray dried products with a market share of 43.1% by value. The freeze dried and the others segment make up for 39.2% and 17.7 % respectively.

Figure 36: Western Europe dehydrated food products market by Technology: 2016(A)-2025(E)

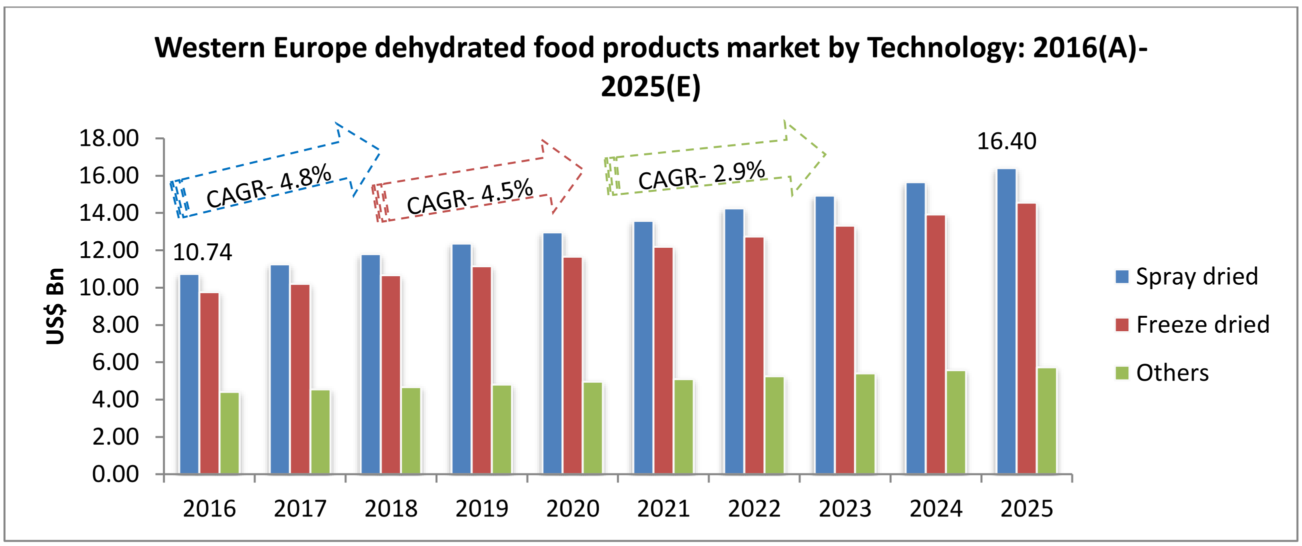
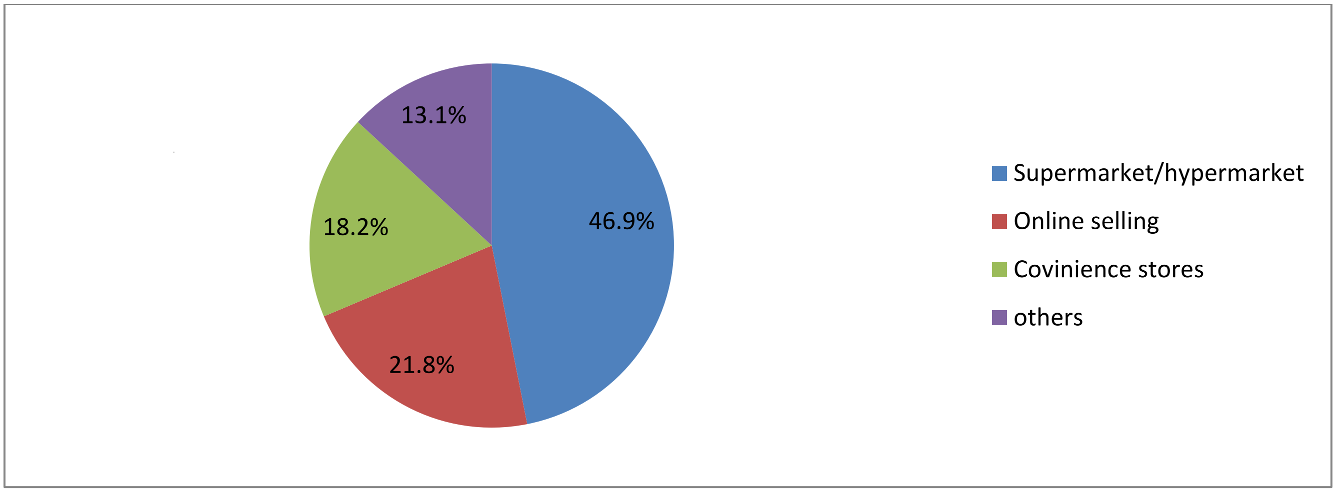


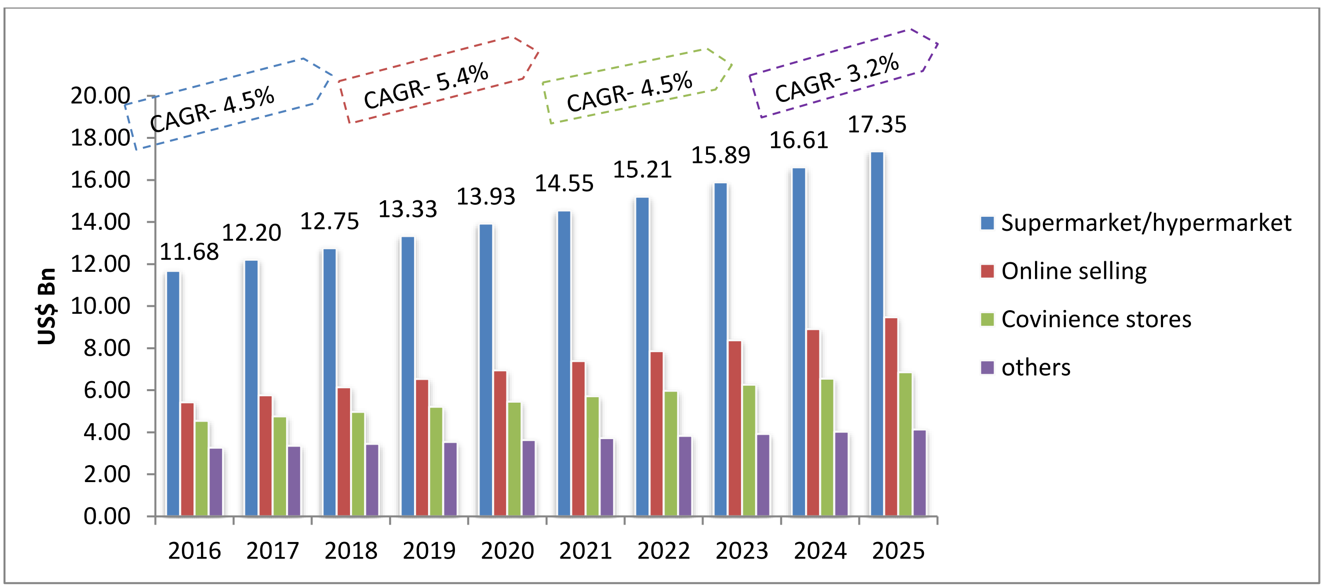
Figure above highlights the growth of dehydrated food products by the type of technology used, the market is estimated to grow for the spray dried dehydrated food products at a relatively higher CAGR of 4.8% over the forecast period. Valued at US$ 10.74 Bn in 2016 is anticipated to reach US$ 16.4 Bn by the end of 2025. The freeze market is estimated to grow at a CAGR of 4.5% and the other technologies used in preparation of dehydrated food represents a growth rate of 2.9% during the forecast period.

Figure 37: Western Europe Dehydrated Food Products Percentage Share by Sales Channel



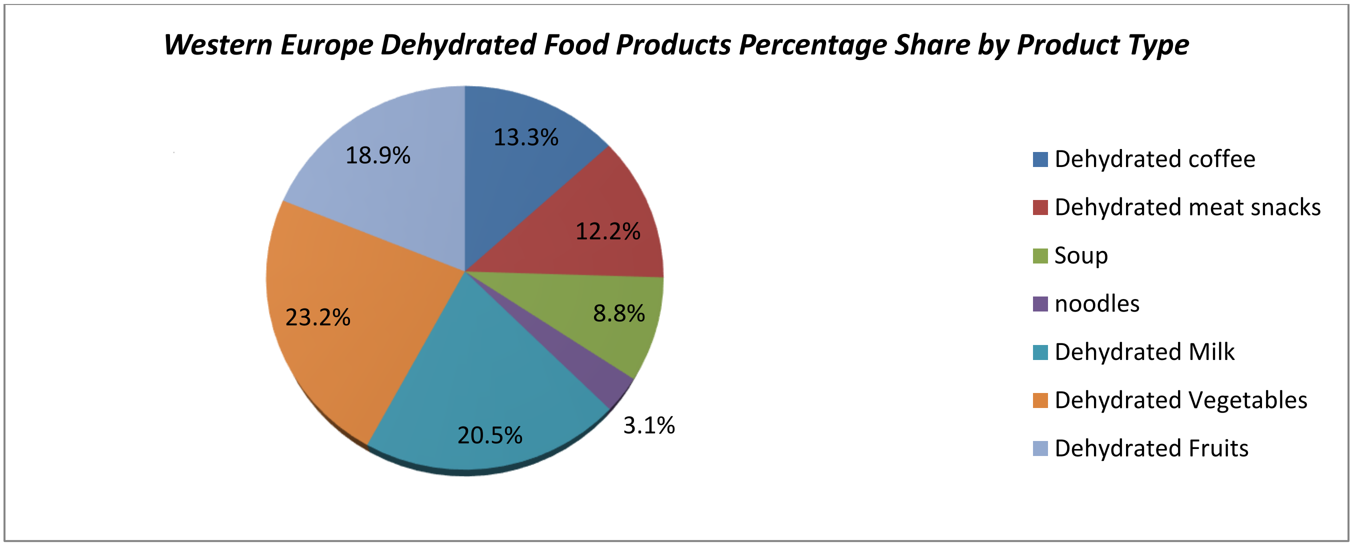
The above pie chart represents Western Europe sales of dehydrated food products through various channels, the sales of dehydrated food being driven by high amount of consumers buying from segments of super/hypermarkets and online retail accounting for 46.9% and 21.8% respectively of sales from this sales channel.

Figure 38: Western Europe dehydrated food products market by Sales Channel: 2016(A)-2025(E)



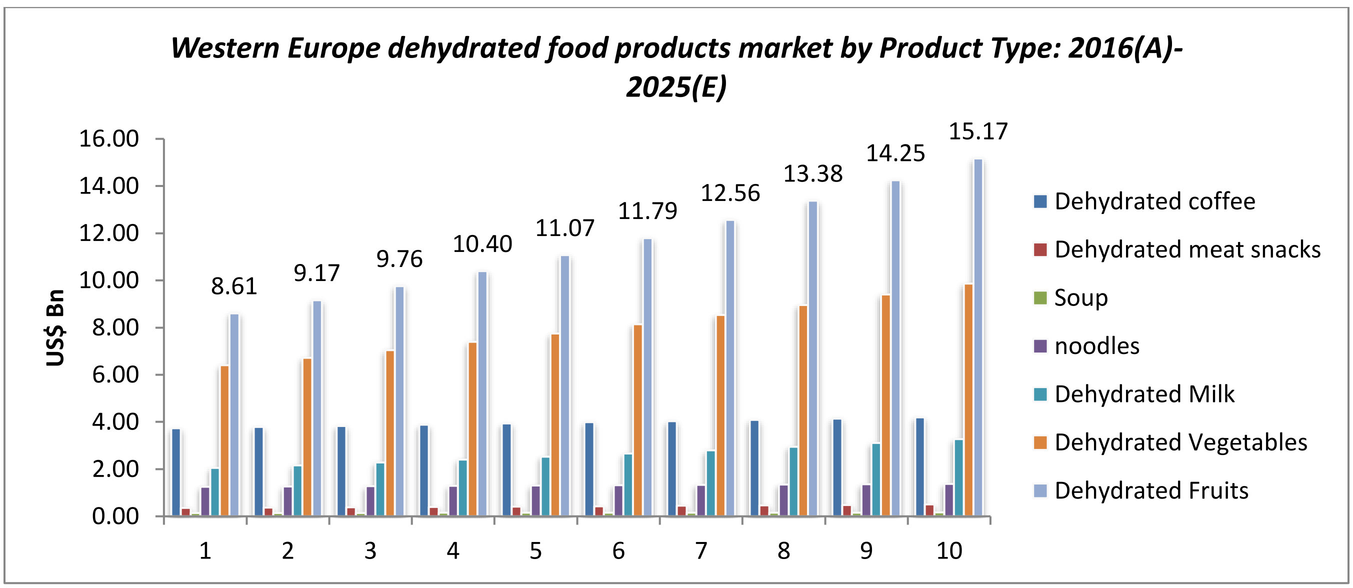
Above figure represents Western Europe dehydrated food products market by sales channel, revenue generated from supermarket/hypermarkets segment is estimated to grow from US$ 11.6Bn in 2016 to US$ 17.3Bn in 2025 reflecting a CAGR of 2.3% however the highest growth rate being online retail with 5.5%.

Figure 39: Western Europe Dehydrated Food Products Percentage Share by Product Type volume



The Western Europe dehydrated food market is expected to witness high growth on the backdrop of high demand of dehydrated vegetables products. The above figure represents the share of various segments of dehydrated food. With dehydrated vegetables accounting for 23.2% of value share and dehydrated milk accounting for 23.2% share in the Western European dehydrated food market.

Figure 40: Western Europe dehydrated food products market by Product Type: 2016(A)-2025(E)



Above figure represents the Western Europe dehydrated food product growth from 2016 to 2025; dehydrated fruits accounted for US$ 8.6 Bn and are estimated to reach US$ 15.1Bn by 2025 end. The highest growth rate being registered by dehydrated milk with a CAGR of 6.5%

Eastern Europe dehydrated food market

Figure 41: Eastern Europe dehydrated food products market overview

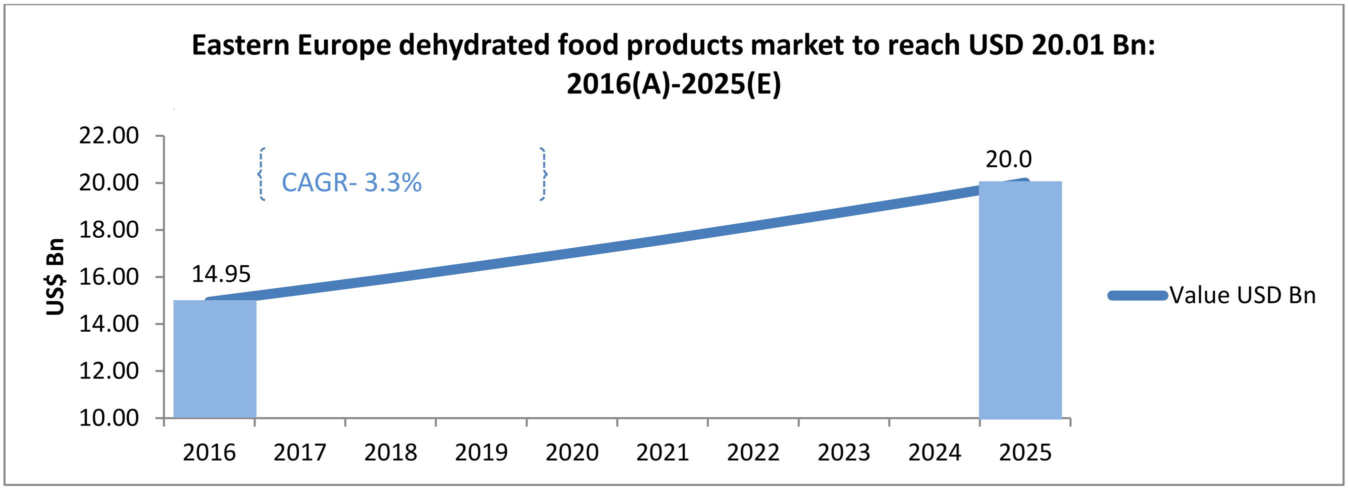
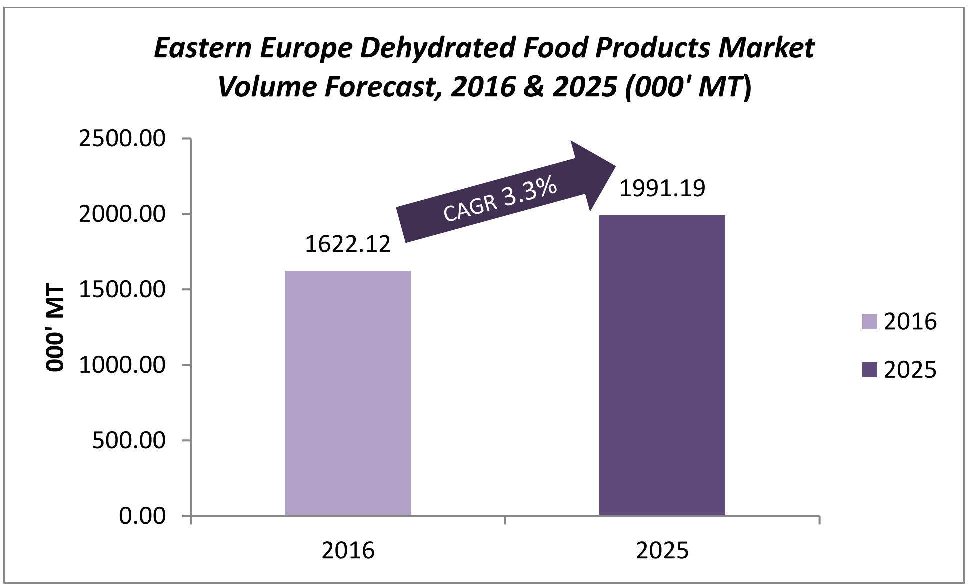


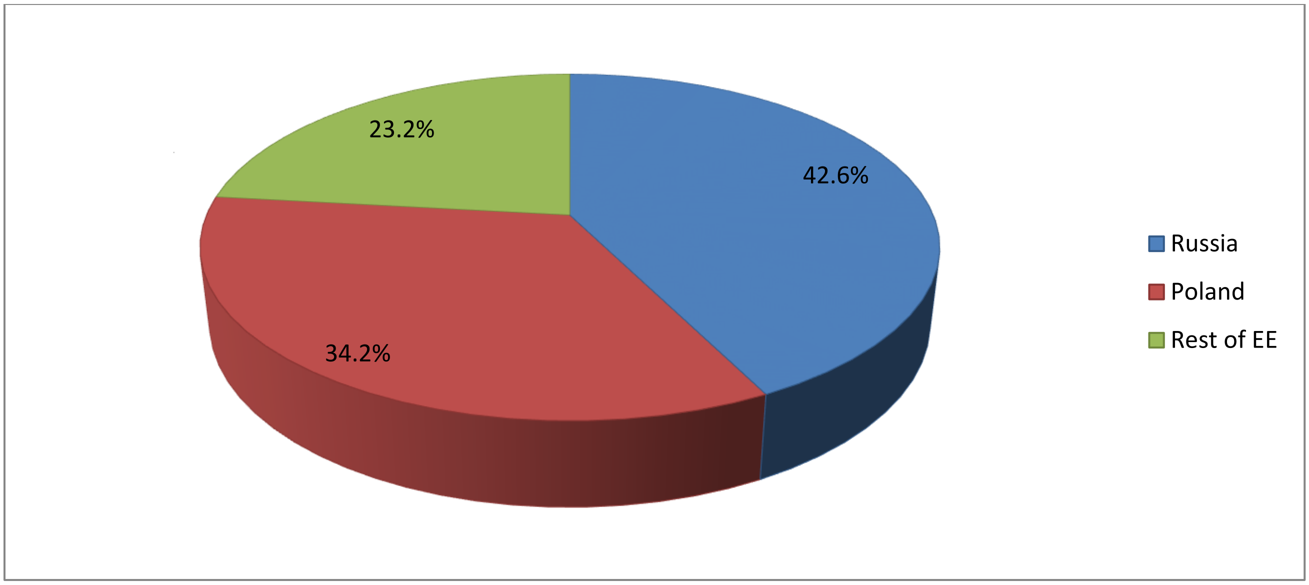
Figure above shows Eastern Europe dehydrated food market value US$ 14.95 Bn in 2016 and is expected to grow at a CAGR of 3.3%. The market is expected to reach to US$ 20.0 Bn by 2025. The driving factors for this growth remain the high consumption and rising demand of dehydrated milk and instant soup

Figure 42: Eastern Europe Dehydrated Food Products Market Volume Forecast, 2016 & 2025 (000' MT)



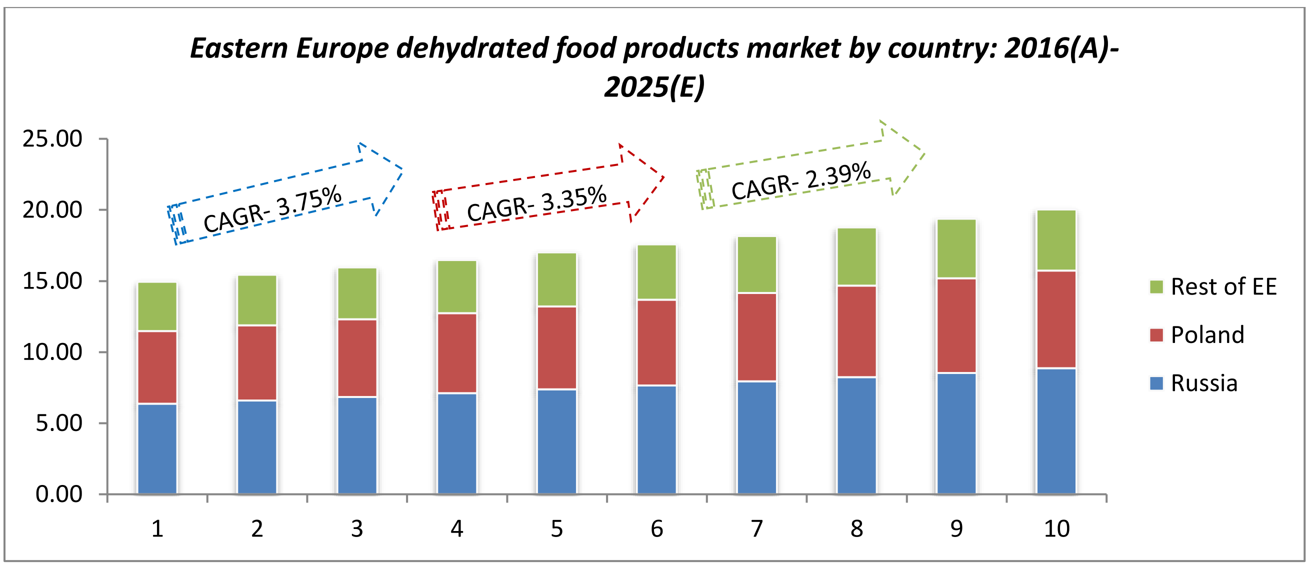
The above figure represents the rise in volume of dehydrated food demand from 2016 to 2025 in Eastern Europe. It is estimated the volume of Eastern Europe dehydrated food will reach 1991.1 thousand metric tons by 2025 end representing a CARG of 3.3% during the forecast period. In 2016 the Eastern European dehydrated food market was 1622.1 thousand metric tons.

Figure 43: Eastern Europe Dehydrated Food Products Percentage Share by Country



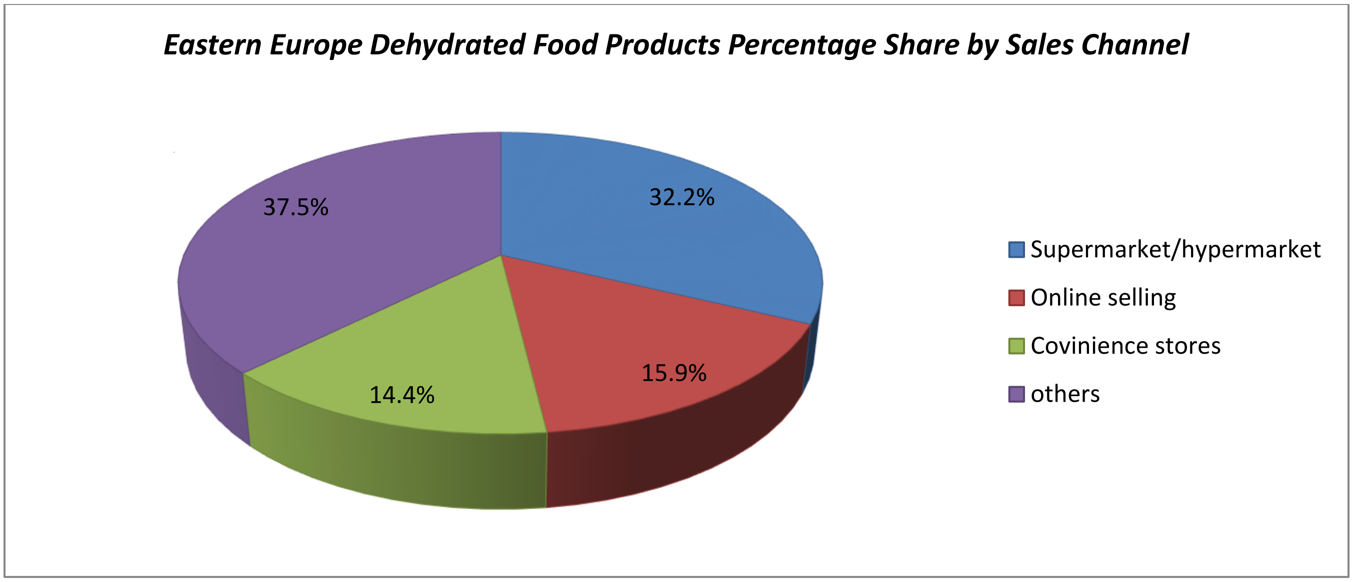
The figure above represents the market share of Eastern Europe countries namely Russia, Poland Rest of Eastern Europe. Russia being the largest market with 42.6% market share of Eastern Europe dehydrated food in terms of value. Poland with a value share percentage of 34.2 % and Rest of Eastern Europe 23.2%

Figure 44: Eastern Europe dehydrated food products market by country: 2016(A)-2025(E)



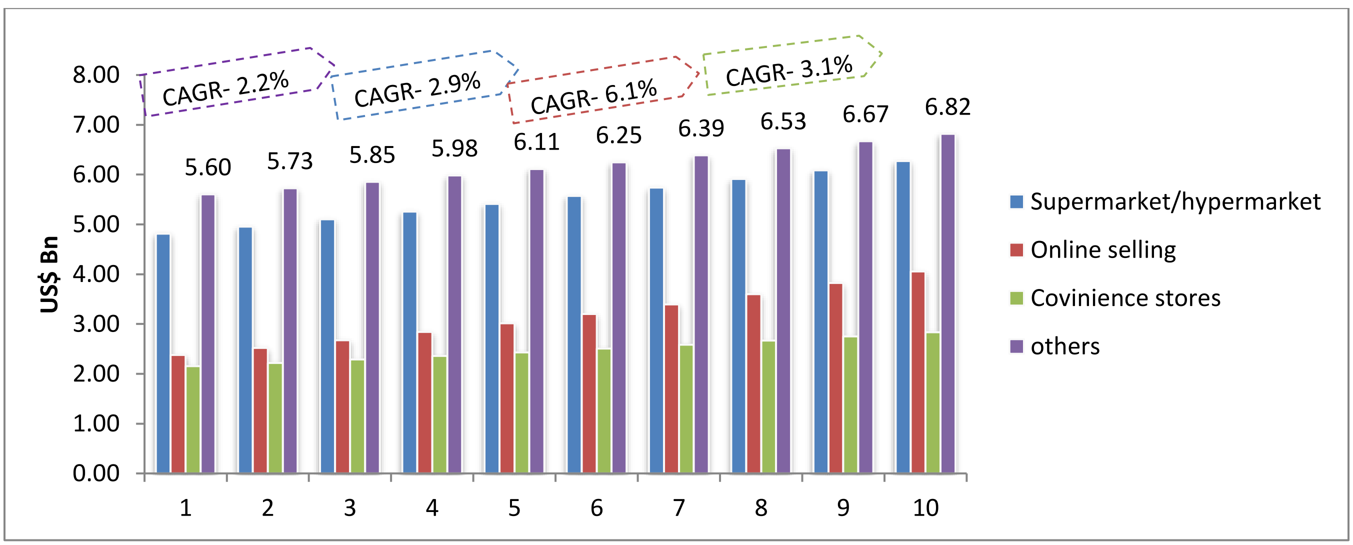
Above figure represents the Eastern Europe dehydrated market growth by country, the highest growth rate being witnessed in Russia registering a CAGR of 3.7%, followed by Poland with a CAGR of 3.5% over the forecast period

Figure 45: Eastern Europe Dehydrated Food Products Percentage Share by Sales Channel



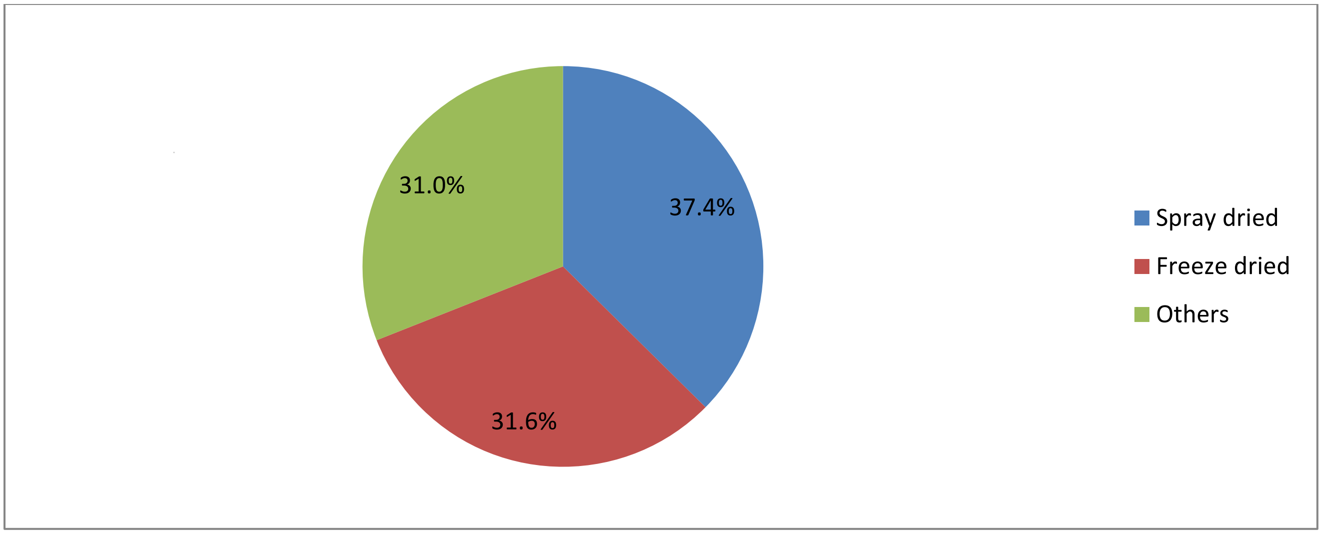
The above pie chart represents Eastern Europe sales of dehydrated food products through various channels, the sales of dehydrated food being driven by high amount of consumers buying from other segments and super/hypermarkets retail accounting for 37.5% and 32.2% respectively of sales from this sales channel.

Figure 46: Eastern Europe dehydrated food products market by Sales Channel: 2016(A)-2025(E)



Above figure represents Eastern Europe dehydrated food products market by sales channel, revenue generated from others segment is estimated to grow from US$ 5.6Bn in 2016 to US$ 6.8Bn in 2025 reflecting a CAGR of 2.2% however the highest growth rate being online retail with 6.1%.

Figure 47: Eastern Europe Dehydrated Food Products Percentage Share by Technology



On the basis of technology used the Eastern Europe dehydrated food products market is dominated by spray dried products with a market share of 37.4% by value. The freeze dried and the others segment make up for 31.6% and 31.0 % respectively.

Figure 48: Eastern Europe dehydrated food products market by Technology: 2016(A)-2025(E)

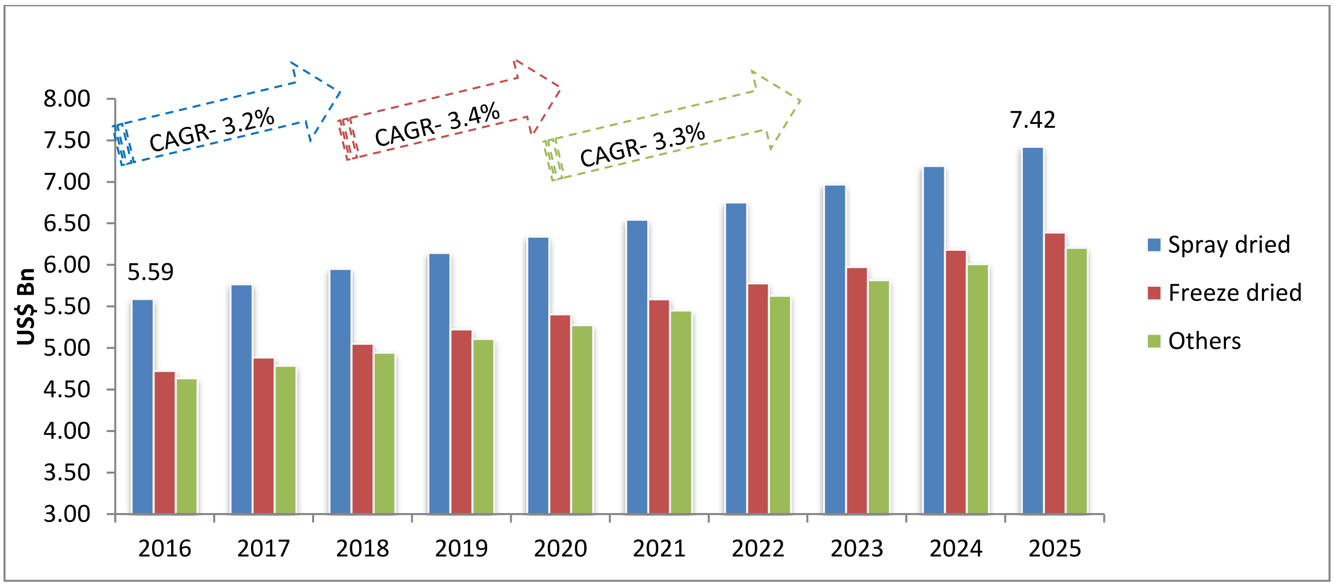
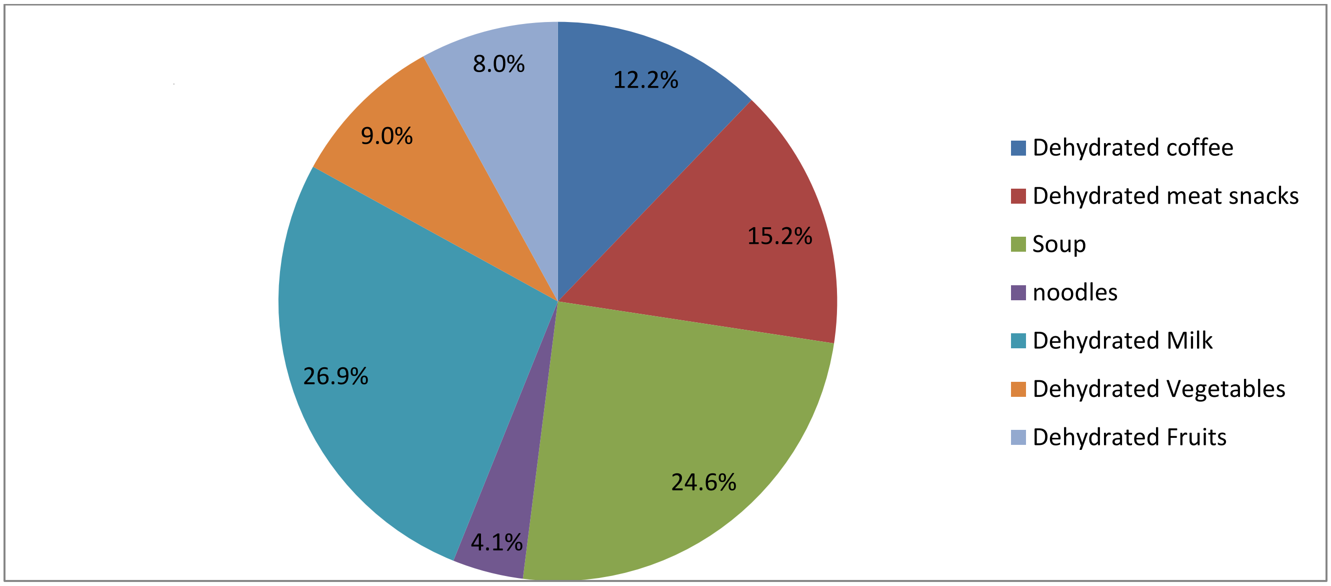


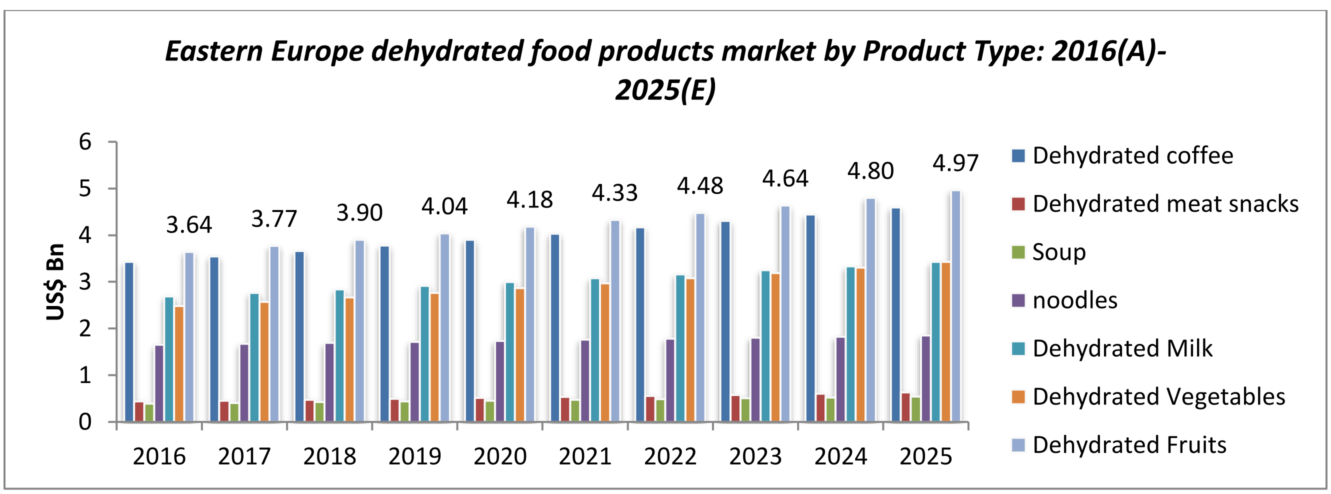
Figure above highlights the growth of dehydrated food products by the type of technology used, the market is estimated to grow for the spray dried dehydrated food products at a CAGR of 3.2% over the forecast period. Valued at US$ 5.5Bn in 2016 is anticipated to reach US$ 7.4Bn by the end of 2025. The freeze market is estimated to grow at a relatively higher CAGR of 3.4% and the other technologies used in preparation of dehydrated food represents a growth rate of 3.3% during the forecast period.

Figure 49: Eastern Europe Dehydrated Food Products Volume Percentage Share by Product Type



The Eastern Europe dehydrated food market is expected to witness high growth owing to high demand of instant soup. The above figure represents the share of various segments of dehydrated food. With instant soup accounting for 24.6% of value share and dehydrated milk accounting for 26.6% share of volume in the Eastern European dehydrated food market.

Figure 50: Eastern Europe dehydrated food products market by Product Type: 2016(A)-2025(E)



Above figure represents the Eastern Europe dehydrated food product growth from 2016 to 2025; dehydrated fruits accounted for US$ 3.6Bn and are estimated to reach US$ 4.9Bn by 2025 end. The highest growth rate being registered by dehydrated vegetables with a CAGR of 3.6%

Middle East & Africa dehydrated food products market

Figure 51: Middle East & Africa dehydrated food products market overview

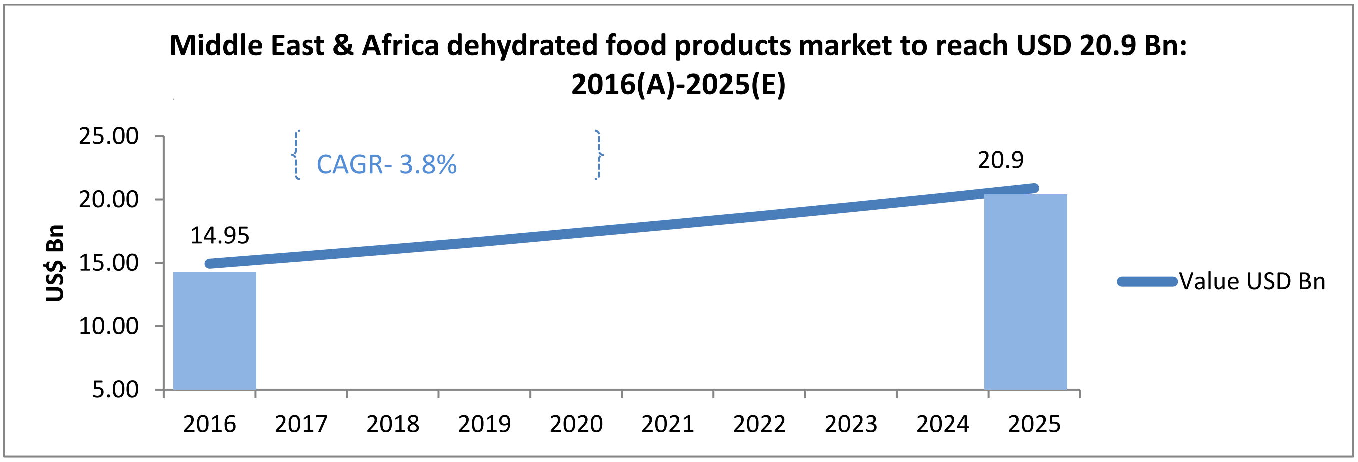
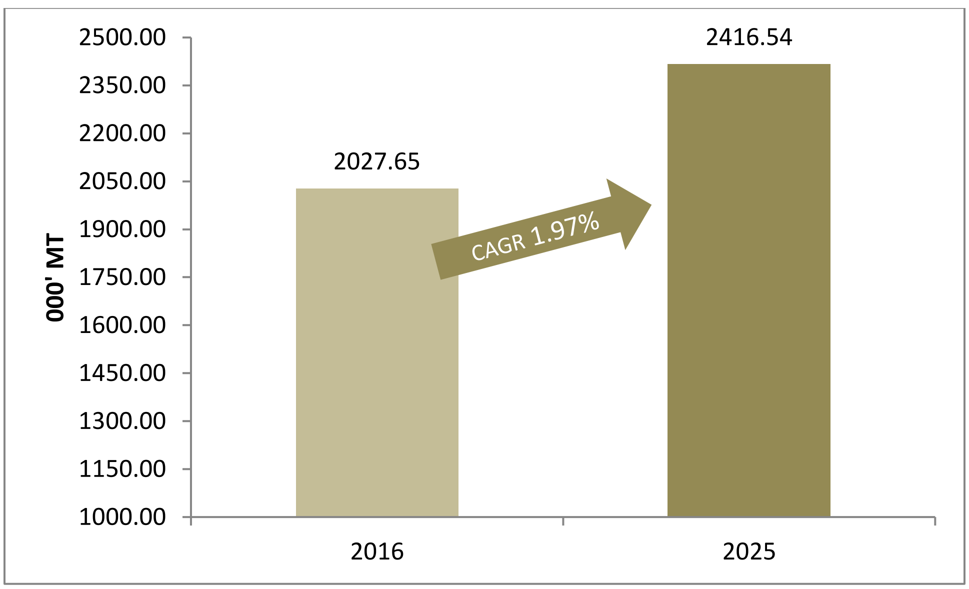


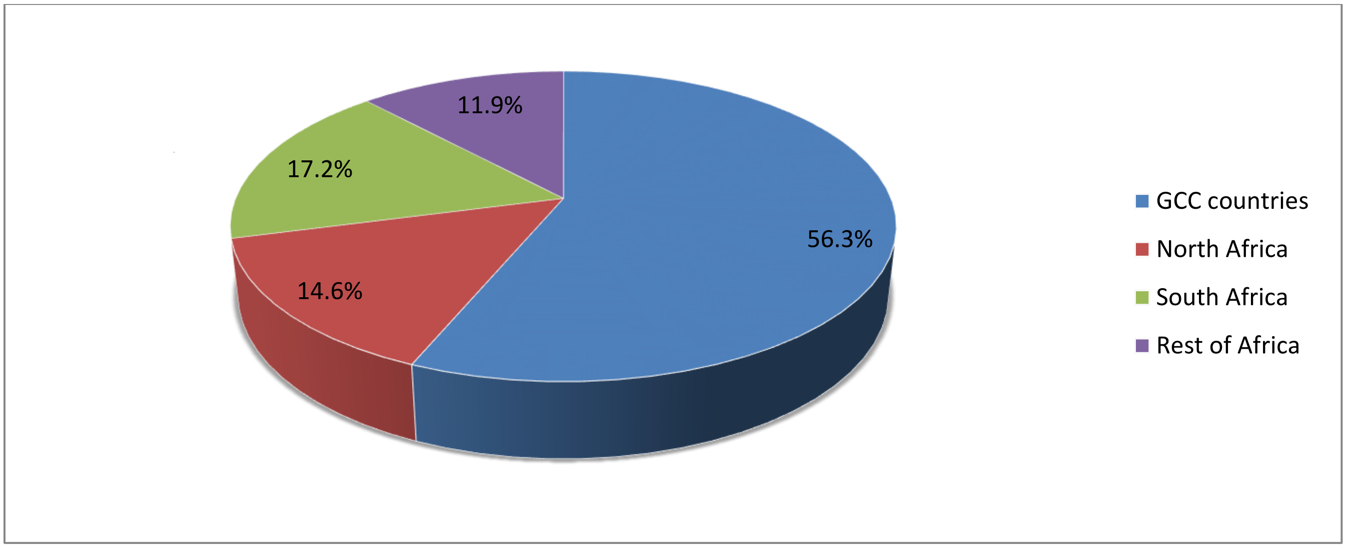
Figure above shows Middle East & Africa dehydrated food market value US$ 14.95 Bn in 2016 and is expected to grow at a CAGR of 3.8%. The market is expected to reach to US$ 20.9 Bn by 2025. The driving factors for this growth remain the high consumption and rising demand of dehydrated milk and instant soup

Figure 52: Middle East & Africa Dehydrated Food Products Market Volume, 2016 & 2025 (000' MT)



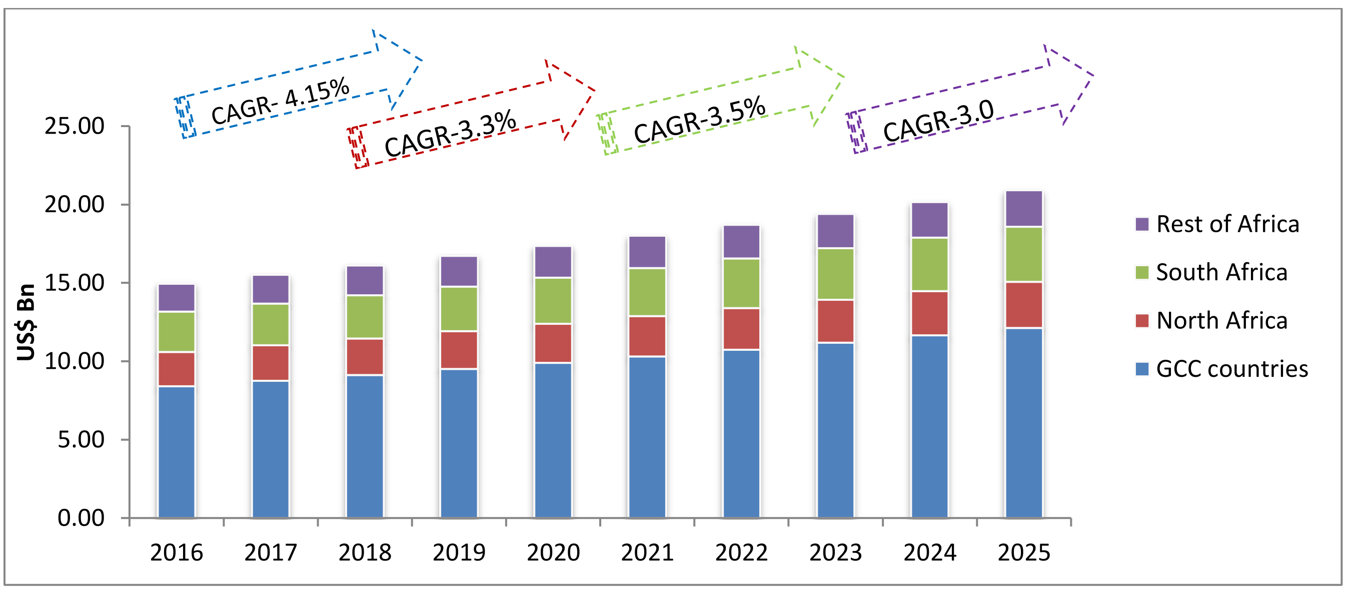
The above figure represents the rise in volume of dehydrated food demand from 2016 to 2025 in Middle East & Africa. It is estimated the volume of Middle East & Africa dehydrated food will reach 1991.1 thousand metric tons by 2025 end representing a CARG of 3.3% during the forecast period. In 2016 the Middle East & Africa dehydrated food market was 1622.1 thousand metric tons

Figure 53: Middle East & Africa Dehydrated Food Products Percentage Share by Country



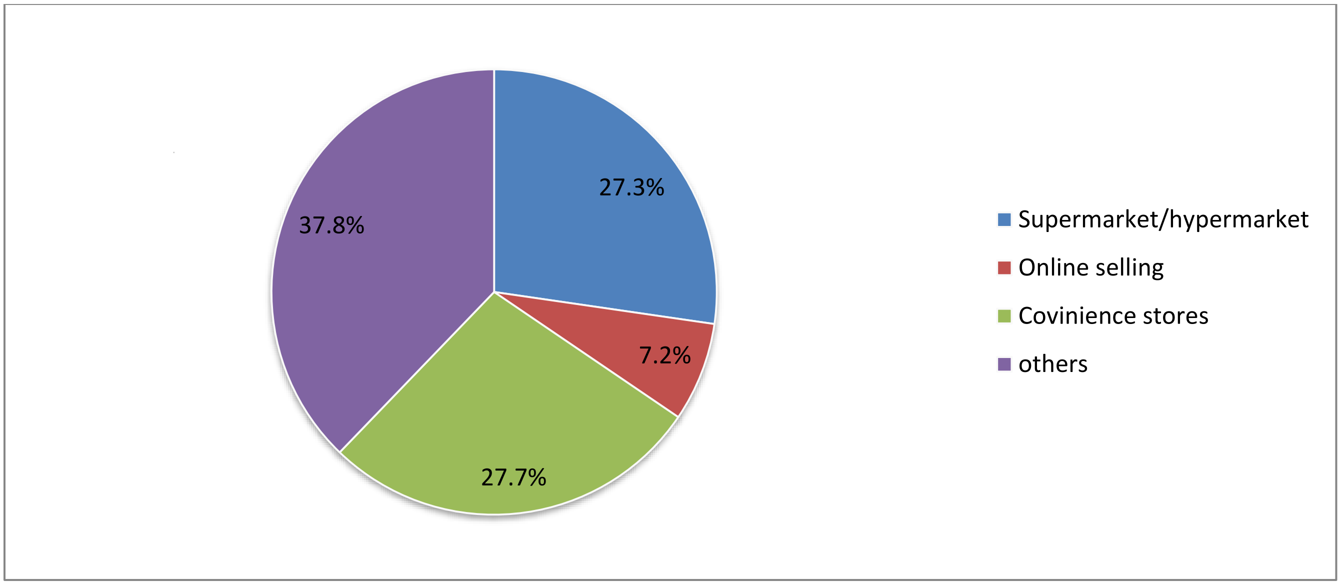
The figure above represents the market share of Middle East & Africa countries namely Gulf Corporation Council Countries, North Africa, South Africa and Rest of Middle East & Africa. GCC countries being the largest market with 56.3% market share of Middle East & Africa dehydrated food in terms of value. South Africa with a value share percentage of 17.2 % and Rest of Middle East & Africa 11.9%

Figure 54: Middle East & Africa dehydrated food products market by country: 2016(A)-2025(E)



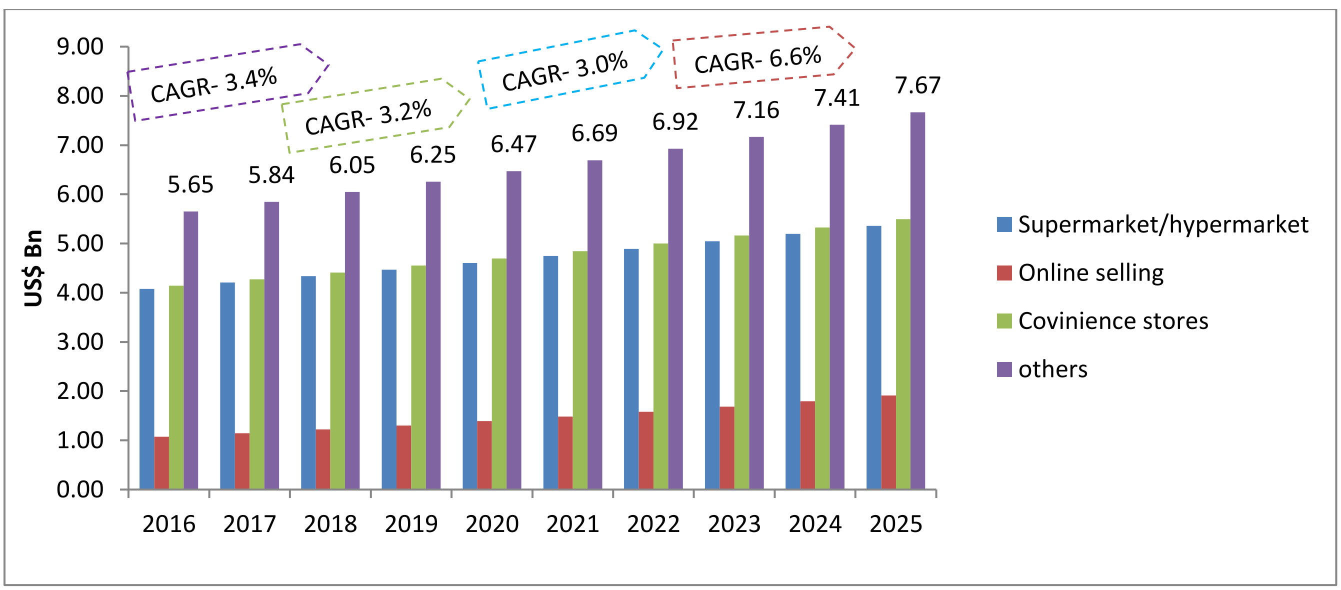
Above figure represents the Middle East & Africa dehydrated market growth by country, the highest growth rate being witnessed in GCC registering a CAGR of 4.1%, followed by South Africa with a CAGR of 3.5% over the forecast period

Figure 55: Middle East & Africa Dehydrated Food Products Percentage Share by Sales Channel



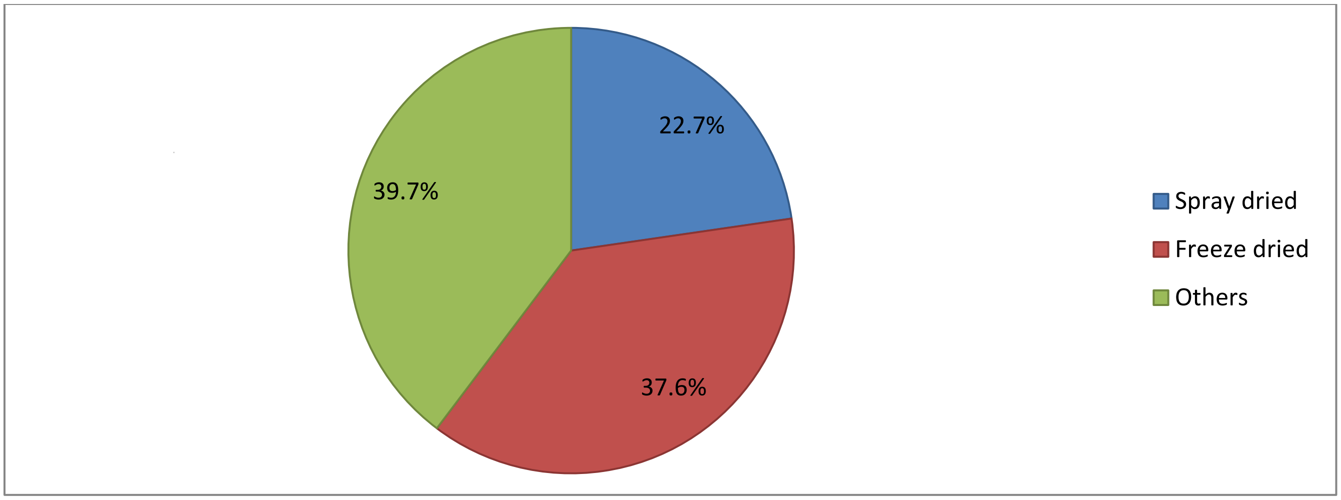
The above pie chart represents Middle East & Africa sales of dehydrated food products through various channels, the sales of dehydrated food being driven by high amount of consumers buying from other segments and super/hypermarkets retail accounting for 37.8% and 27.3% respectively of sales from this sales channel.

Figure 56: Middle East & Africa dehydrated food products market by Sales Channel: 2016(A)-2025(E)



Above figure represents Middle East & Africa dehydrated food products market by sales channel, revenue generated from others segment is estimated to grow from US$ 5.6 Bn in 2016 to US$ 7.6 Bn in 2025 reflecting a CAGR of 3.4% however the highest growth rate being online retail with 6.6%.

Figure 57: Middle East & Africa Dehydrated Food Products Percentage Share by Technology



On the basis of technology used the Middle East & Africa dehydrated food products market is dominated by other segment of technologies for manufacturing dehydrated food products with a market share of 39.7% by value. The freeze dried and the spray dried segment make up for 37.6% and 22.7 % respectively.

Figure 58: Middle East & Africa dehydrated food products market by Technology: 2016(A)-2025(E)

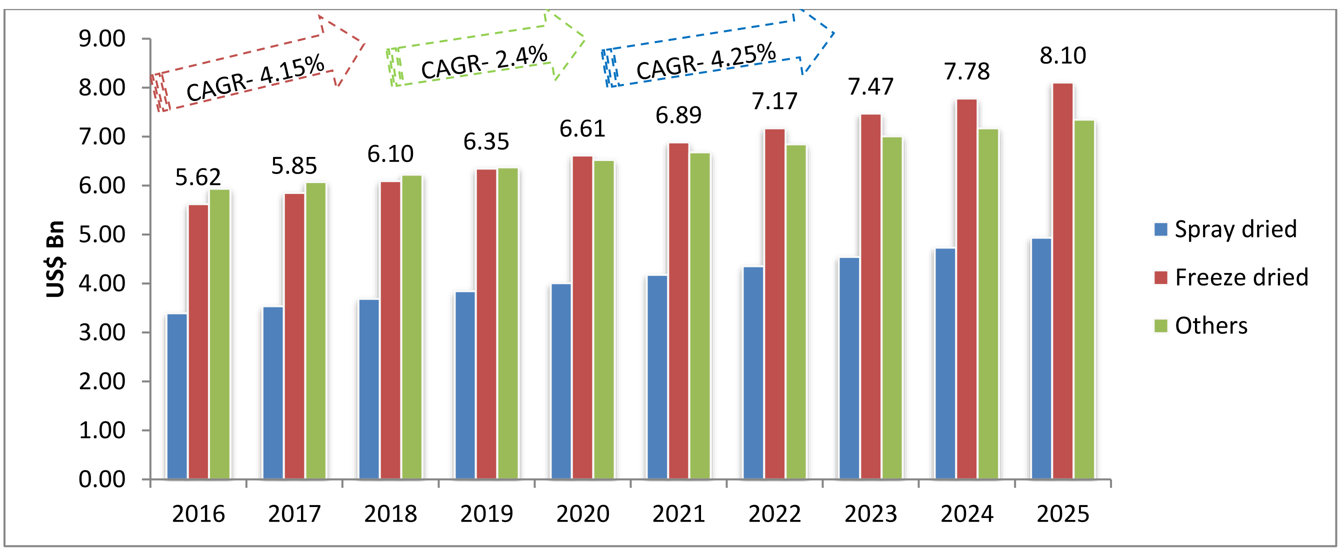
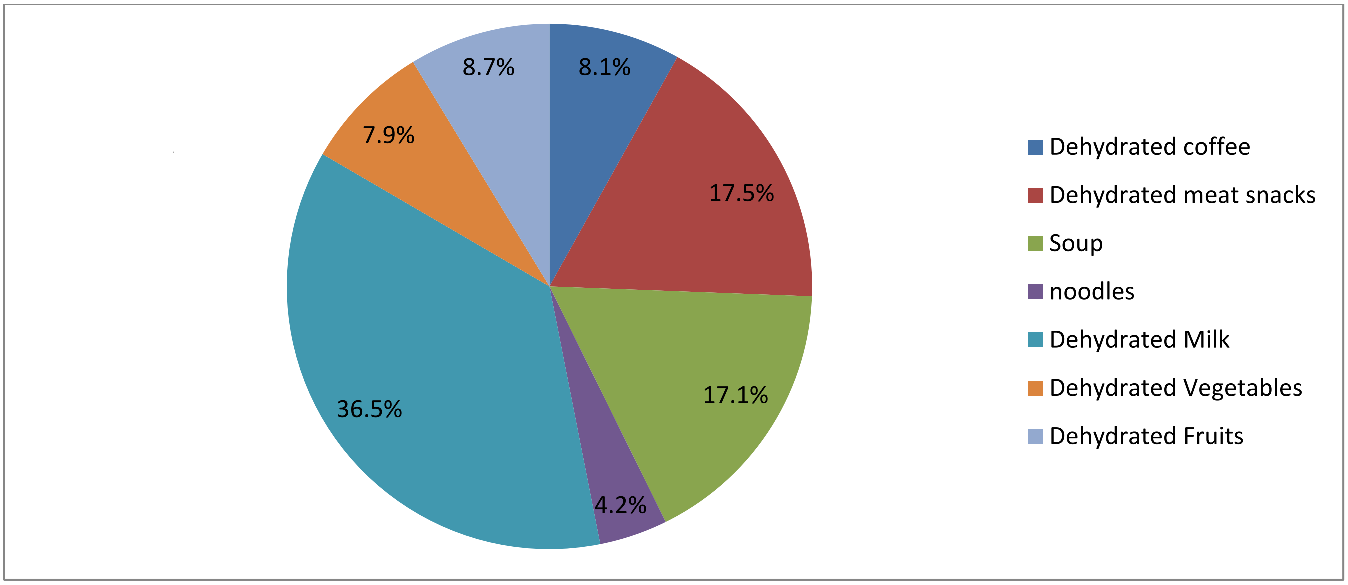


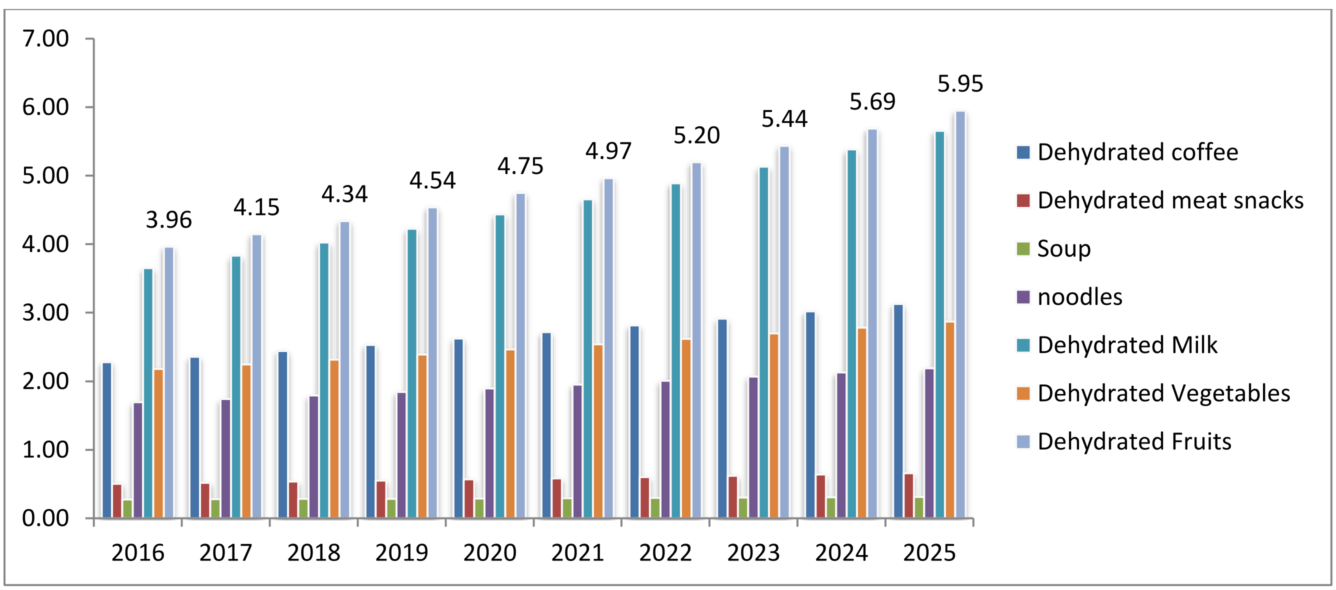
Figure above highlights the growth of dehydrated food products by the type of technology used, the market is estimated to grow for the freeze dried dehydrated food products at a CAGR of 4.1% over the forecast period. Valued at US$ 5.6Bn in 2016 is anticipated to reach US$ 8.1Bn by the end of 2025. The spray dried market is estimated to grow at a relatively higher CAGR of 4.2% and the othertechnologies used in preparation of dehydrated food represents a growth rate of 2.4% during the forecast period.

Figure 59: Middle East & Africa Dehydrated Food Products Percentage Share by Product Type



The Middle East & Africa dehydrated food market is expected to witness high growth owing to high demand of dehydrated milk. The above figure represents the share of various segments of dehydrated food. With dehydrated milk accounting for 36.5% of value share and dehydrated meat snacks accounting for 17.5% share of volume in the Middle East & Africa dehydrated food market.

Figure 60: Middle East & Africa dehydrated food products market by Product Type: 2016(A)-2025(E)



Above figure represents the Middle East & Africa dehydrated food product growth from 2016 to 2025; dehydrated fruits accounted for US$ 3.9Bn and are estimated to reach US$ 5.9 Bn by 2025 end. The highest growth rate being registered by dehydrated milk with a CAGR of 4.98%

Asia Pacific dehydrated food

Figure 61: Asia Pacific dehydrated food products market to reach USD 79.3 Bn: 2016(A)-2025(E)

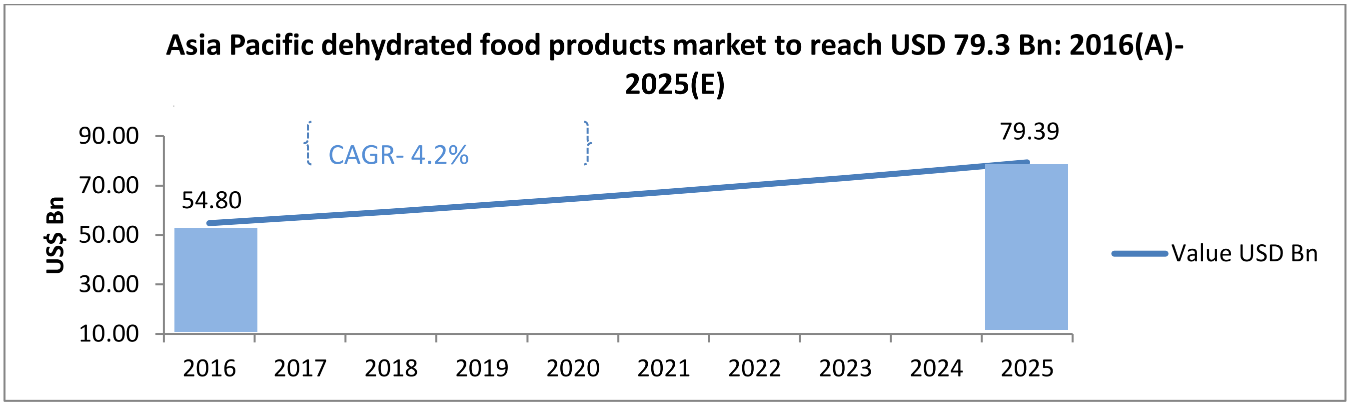
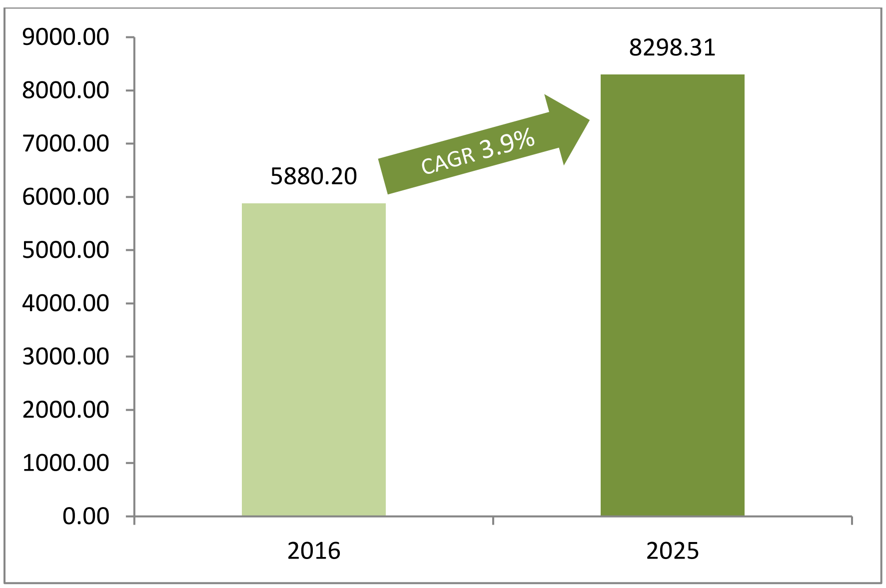


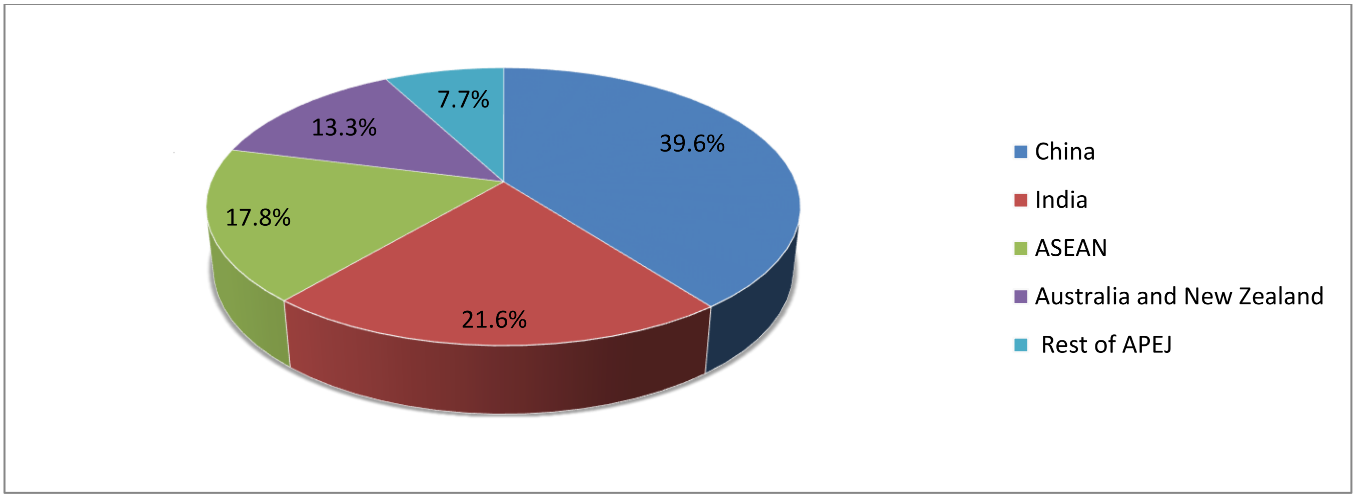
Figure above shows Asia Pacific dehydrated food market value US$ 54.8Bn in 2016 and is expected to grow at a CAGR of 4.2%. The market is expected to reach to US$ 79.3Bn by 2025. The driving factors for this growth remain the high consumption and rising demand of instant noodles

Figure 62: Asia Pacific Dehydrated Food Products Market Volume Forecast 2016 & 2025 (000' MT)



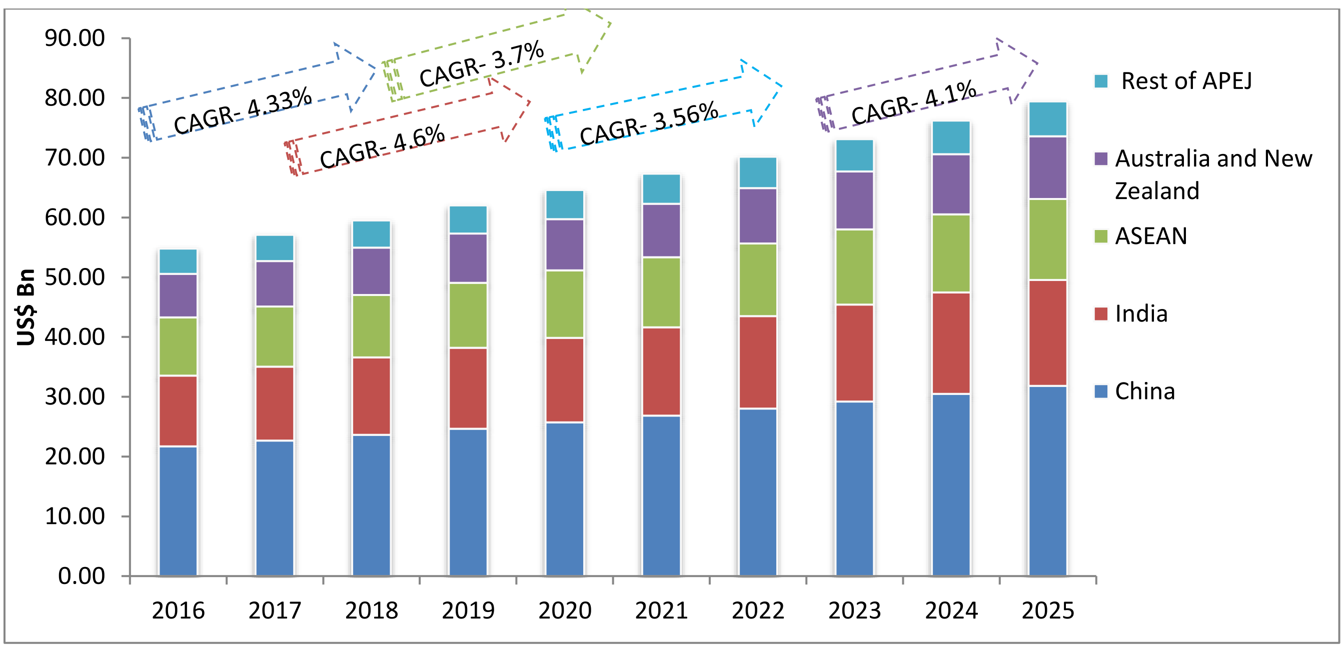
The above figure represents the rise in volume of dehydrated food demand from 2016 to 2025 in Asia Pacific. It is estimated the volume of Asia Pacific dehydrated food will reach 8298.3 thousand metric tons by 2025 end representing a CARG of 3.9% during the forecast period. In 2016 the Asia Pacific dehydrated food market was 5880.2 thousand metric tons

Figure 63: Asia Pacific Dehydrated Food Products Percentage Share by Country



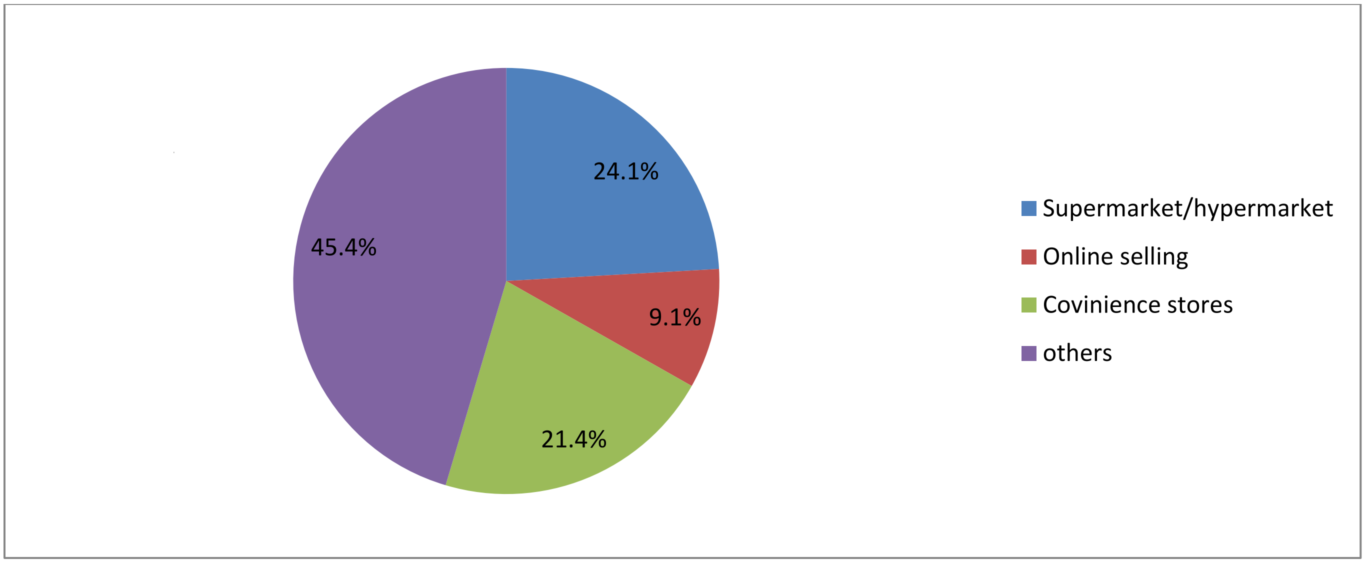
The figure above represents the market share of Asia Pacific countries namely China, India, ASEAN, Australia & New Zealand and Rest of Asia Pacific. China being the largest market with 39.6% market share of Asia Pacific dehydrated food in terms of value. India with a value share percentage of 21.6 % ASEAN at 17.8% and Rest of Asia Pacific 7.7%

Figure 64: Asia Pacific dehydrated food products market by country: 2016(A)-2025(E)



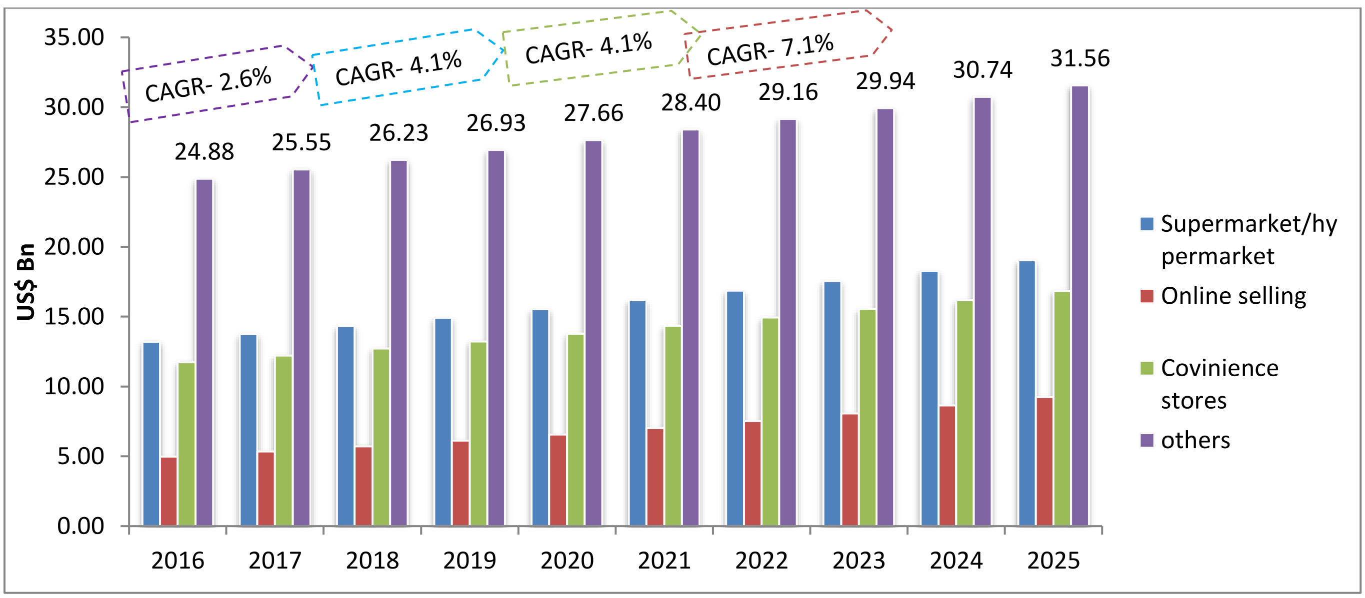
Above figure represents the Asia Pacific dehydrated market growth by country, the highest growth rate being witnessed in India registering a CAGR of 4.6%, followed by China with a CAGR of 4.3% over the forecast period

Figure 65: Asia Pacific Dehydrated Food Products Percentage Share by Sales Channel



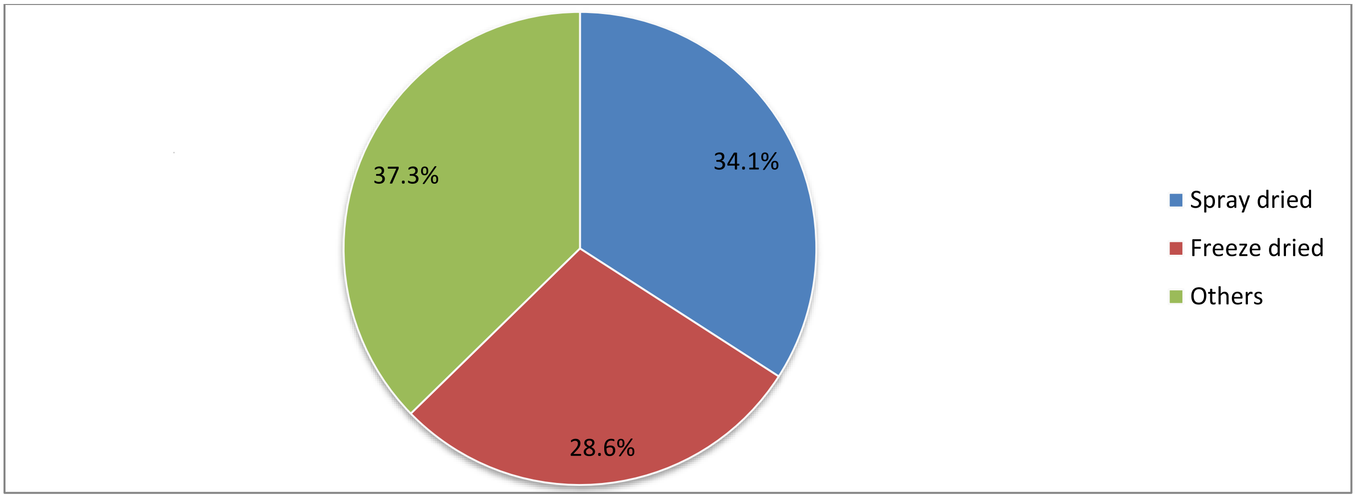
The above pie chart represents Asia Pacific sales of dehydrated food products through various channels, the sales of dehydrated food being driven by high amount of consumers buying from other segments and super/hypermarkets retail accounting for 25.4% and 24.1% respectively of sales from this sales channel.

Figure 66: Asia Pacific dehydrated food products market by Sales Channel: 2016(A)-2025(E)



Above figure represents Asia Pacific dehydrated food products market by sales channel, revenue generated from others segment is estimated to grow from US$ 24.8Bn in 2016 to US$ 31.5Bn in 2025 reflecting a CAGR of 2.6% however the highest growth rate being online retail with 7.1%.

Figure 67: Asia Pacific Dehydrated Food Products Percentage Share by Technology



On the basis of technology used the Asia Pacific dehydrated food products market is dominated by other segment of technologies for manufacturing dehydrated food products with a market share of 37.3% by value. The spray dried and the freeze dried segment make up for 34.1% and 28.6% respectively.

Figure 68: Asia Pacific dehydrated food products market by Technology: 2016(A)-2025(E)

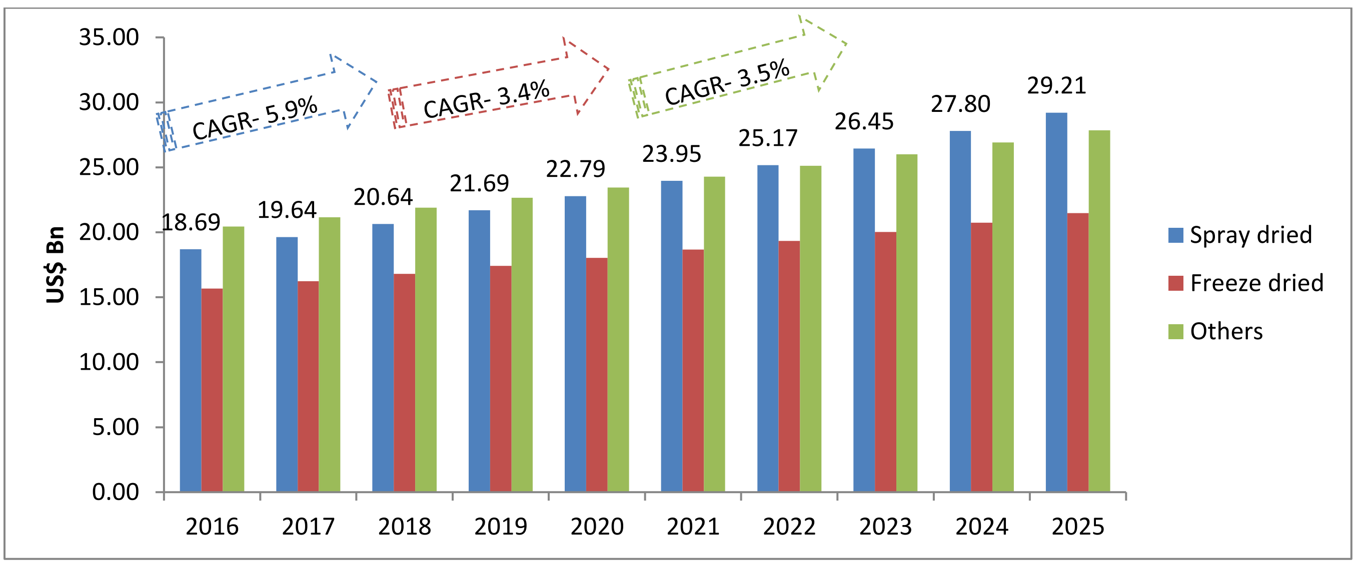
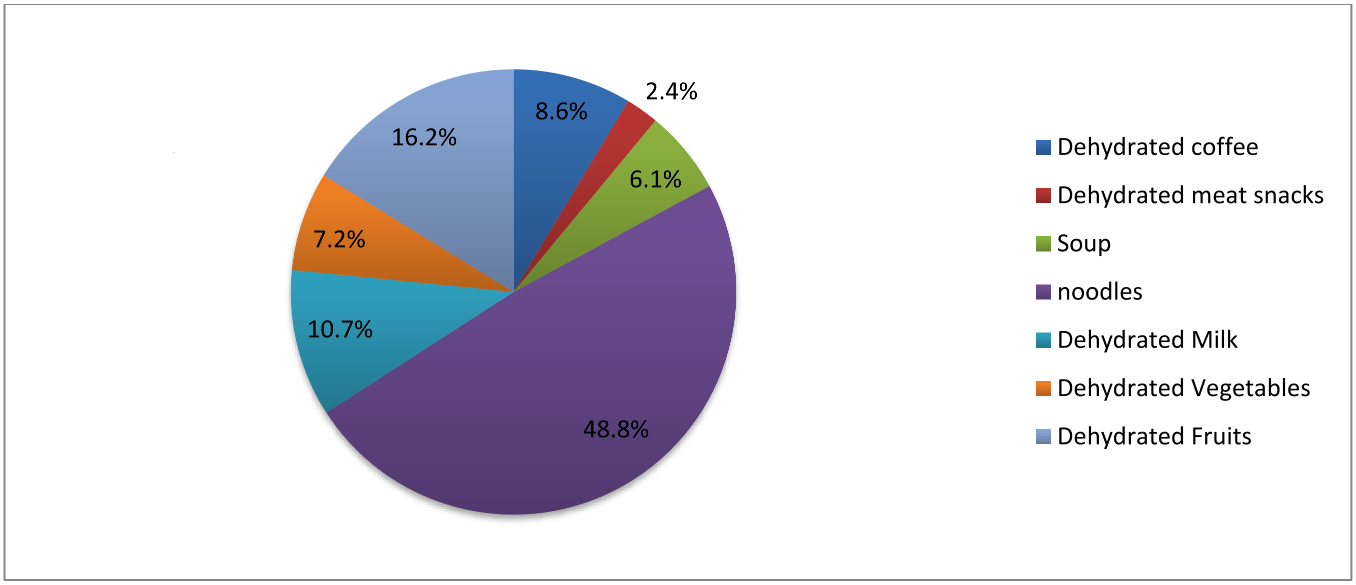


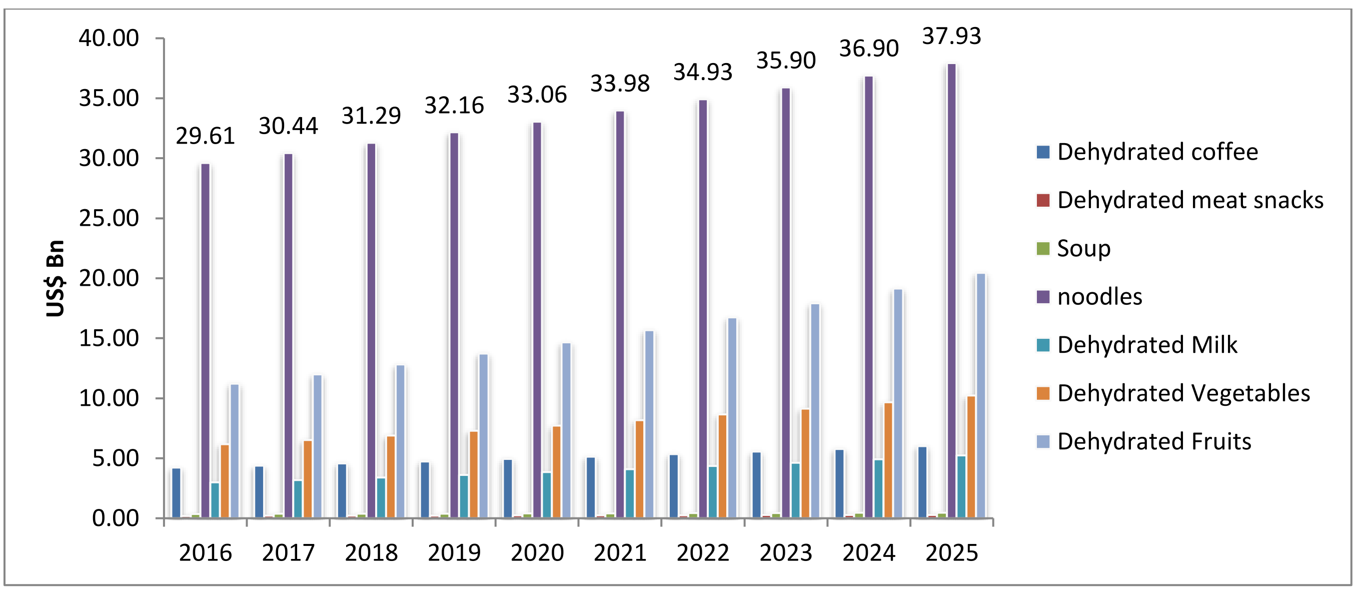
Figure above highlights the growth of dehydrated food products by the type of technology used, the market is estimated to grow for the spray dried dehydrated food products at a CAGR of 5.9% over the forecast period. Valued at US$ 18.9Bn in 2016 is anticipated to reach US$ 29.2Bn by the end of 2025. The freeze dried market is estimated to grow at a CAGR of 3.5% and the other technologies used in preparation of dehydrated food represents a growth rate of 3.4% during the forecast period.

Figure 69: Asia Pacific Dehydrated Food Products Percentage Share by Product Type



The Asia Pacific dehydrated food market is expected to witness high growth owing to high demand of instant noodles. The above figure represents the share of various segments of dehydrated food. With instant noodles accounting for 48.8% of volume share and dehydrated fruits accounting for 17.5% share of volume in the Asia Pacific dehydrated food market.

Figure 70: Asia Pacific dehydrated food products market by Product Type: 2016(A)-2025(E)



Above figure represents the Asia Pacific dehydrated food product growth from 2016 to 2025; dehydrated fruits accounted for US$ 3.9 Bn and are estimated to reach US$ 5.9 Bn by 2025 end. The highest growth rate being registered by dehydrated fruits with a CAGR of 6.9%

Japan dehydrated food products market

Figure 71: Japan dehydrated food products market overview

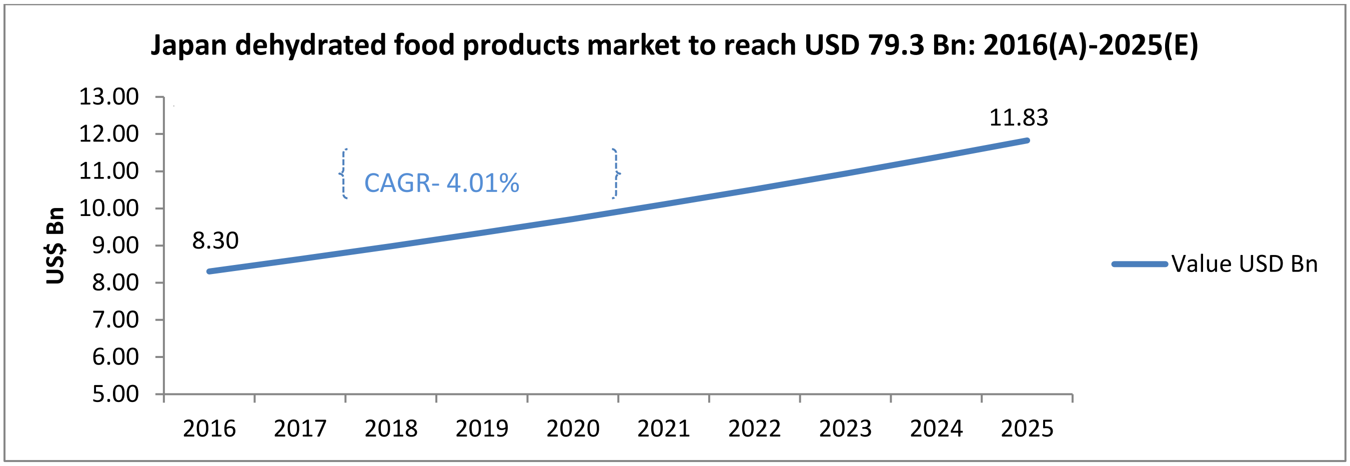
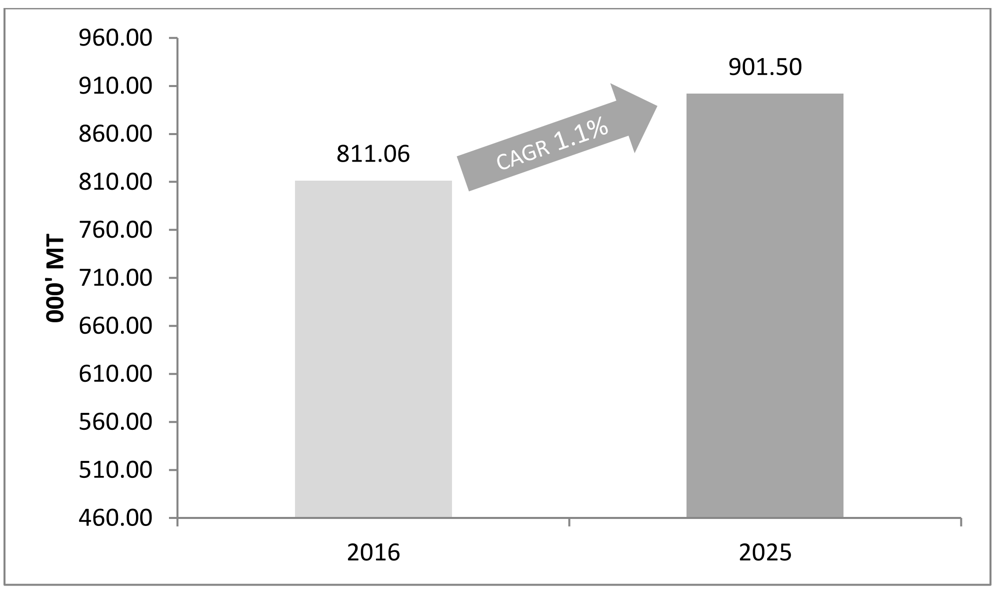


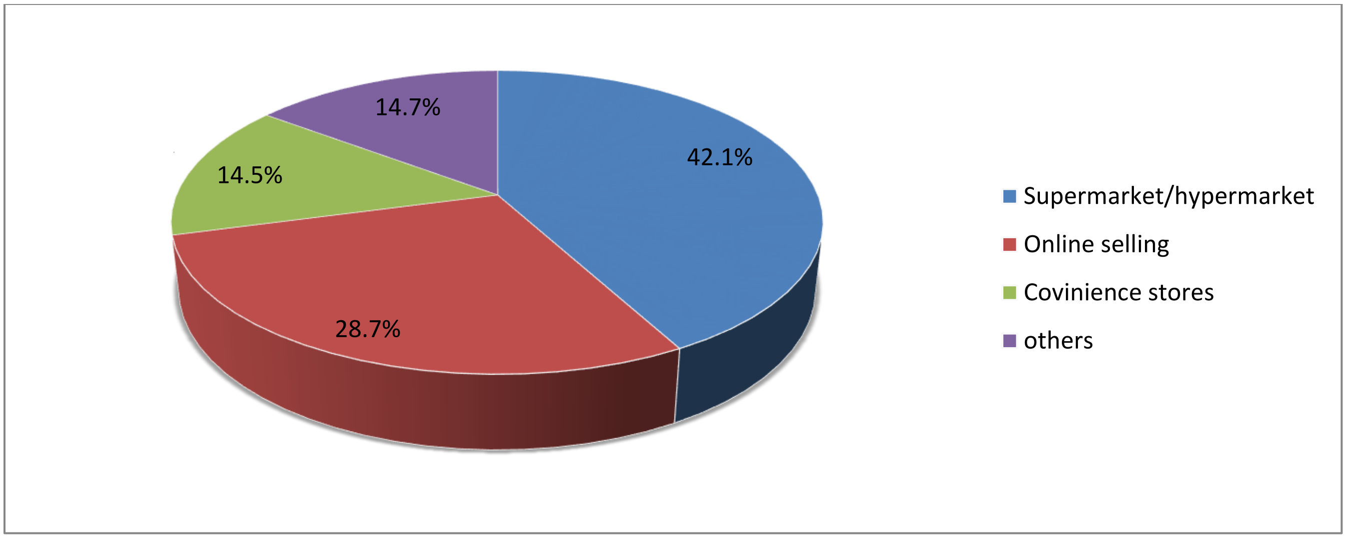
Figure above shows Japan dehydrated food market value US$ 8.3Bn in 2016 and is expected to grow at a CAGR of 4.0%. The market is expected to reach to US$ 11.8Bn by 2025. The driving factors for this growth remain the high consumption and rising demand of instant noodles and dehydrated fruits

Figure 72: Japan Dehydrated Food Products Market Volume Forecast, 2016 & 2025 (000' MT)



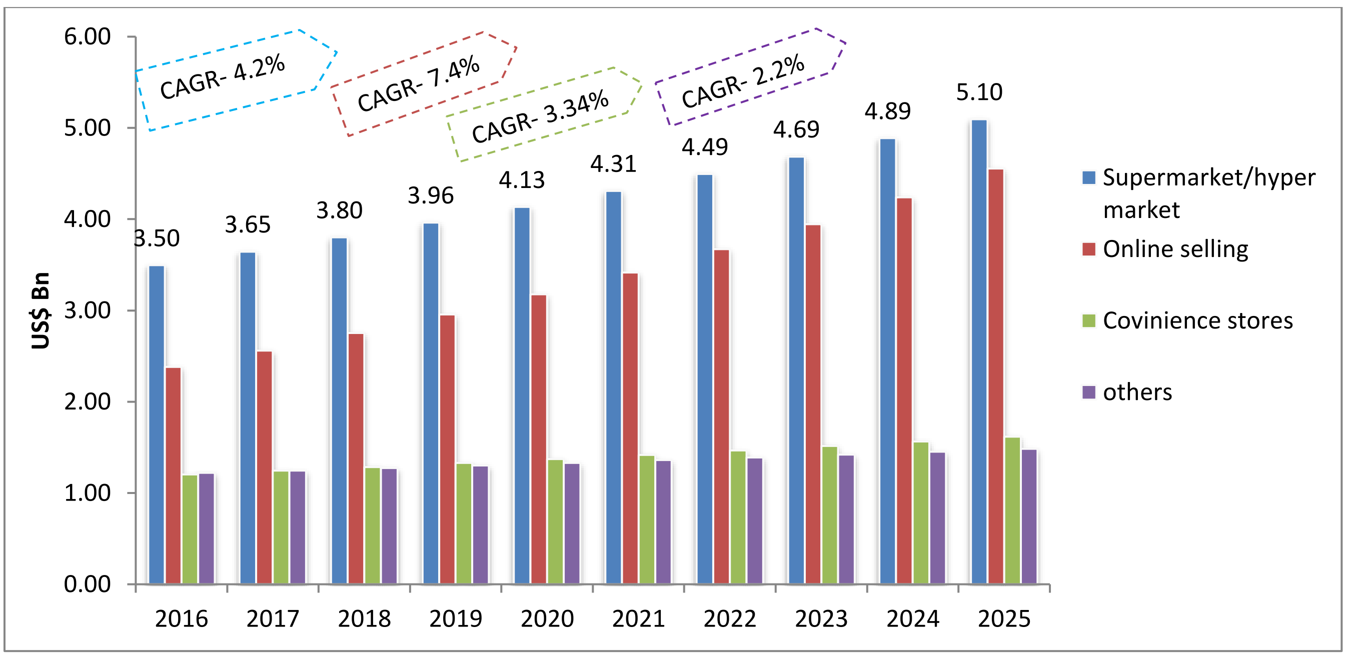
The above figure represents the rise in volume of dehydrated food demand from 2016 to 2025 in Japan. It is estimated the volume of Japan dehydrated food will reach 901.5 thousand metric tons by 2025 end representing a CARG of 1.1% during the forecast period. In 2016 the Japan dehydrated food market was 811.6 thousand metric tons

Figure 73: Japan Dehydrated Food Products Percentage Share by Sales Channel



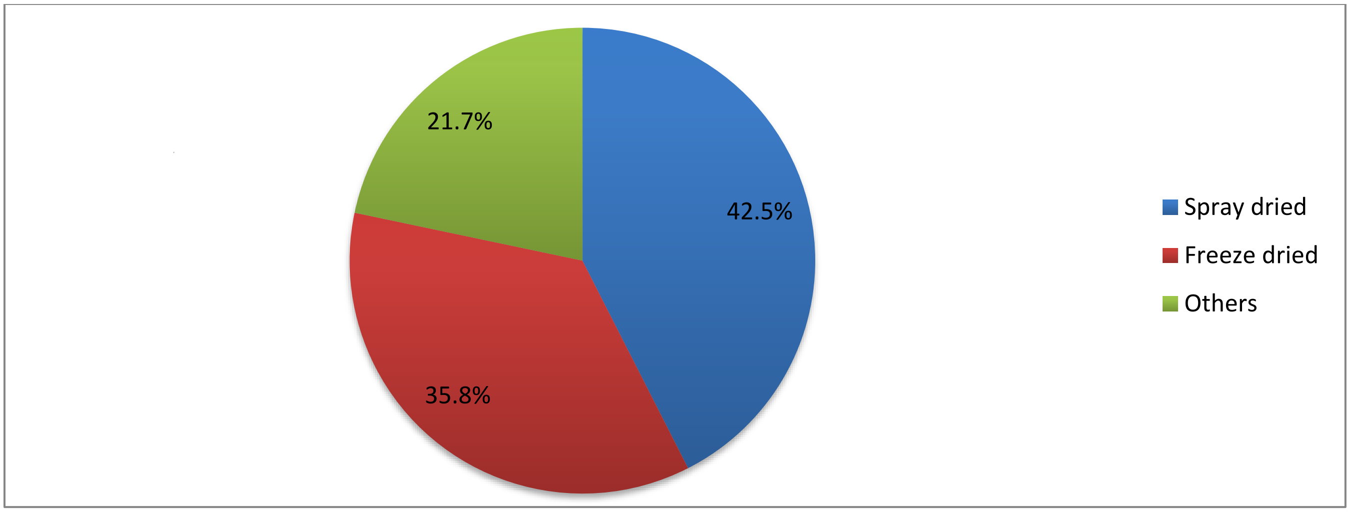
The above pie chart represents Japan sales of dehydrated food products through various channels, the sales of dehydrated food being driven by high amount of consumers buying from supermarkets/hypermarkets and online retail accounting for 42.1% and 28.7% respectively of sales from this sales channel.

Figure 74: Japan dehydrated food products market by Sales Channel: 2016(A)-2025(E)



Above figure represents Japan dehydrated food products market by sales channel, revenue generated from supermarkets/hypermarkets is estimated to grow from US$ 3.5Bn in 2016 to US$ 5.1Bn in 2025 reflecting a CAGR of 4.2% however the highest growth rate being online retail with 7.4%.

Figure 75: Japan Dehydrated Food Products Percentage Share by Technology



On the basis of technology used Japan dehydrated food products market is dominated by spry dried segment for manufacturing dehydrated food products with a market share of 42.5% by value. The freeze dried and the other segment make up for 35.8% and 42.5 % respectively

Figure 76: Japan dehydrated food products market by Technology: 2016(A)-2025(E)

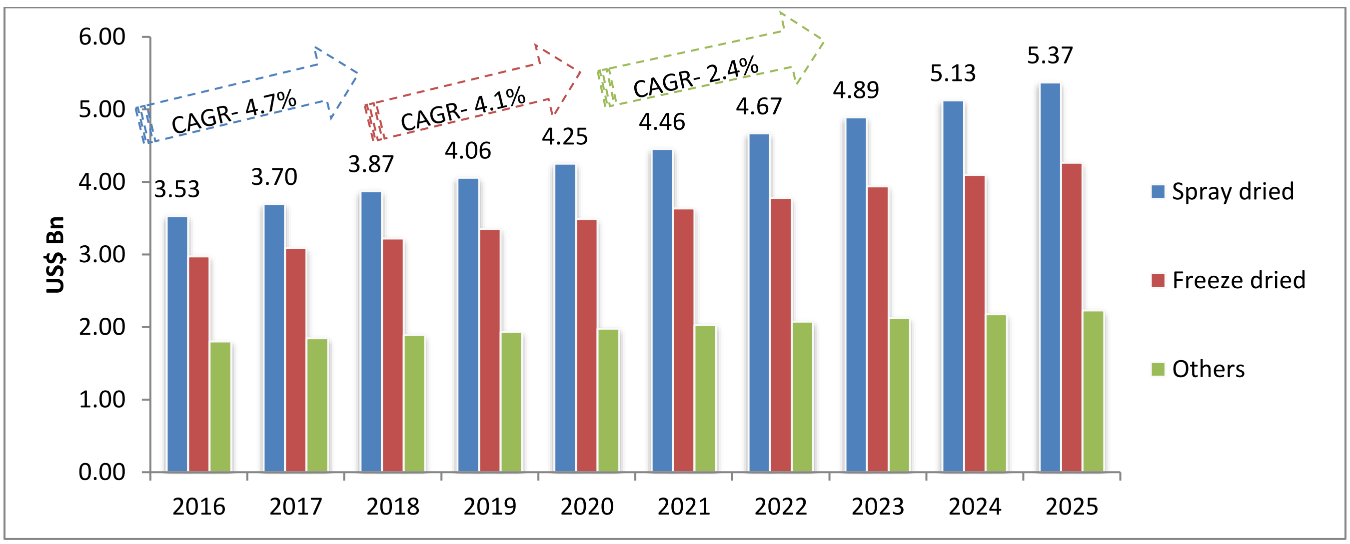
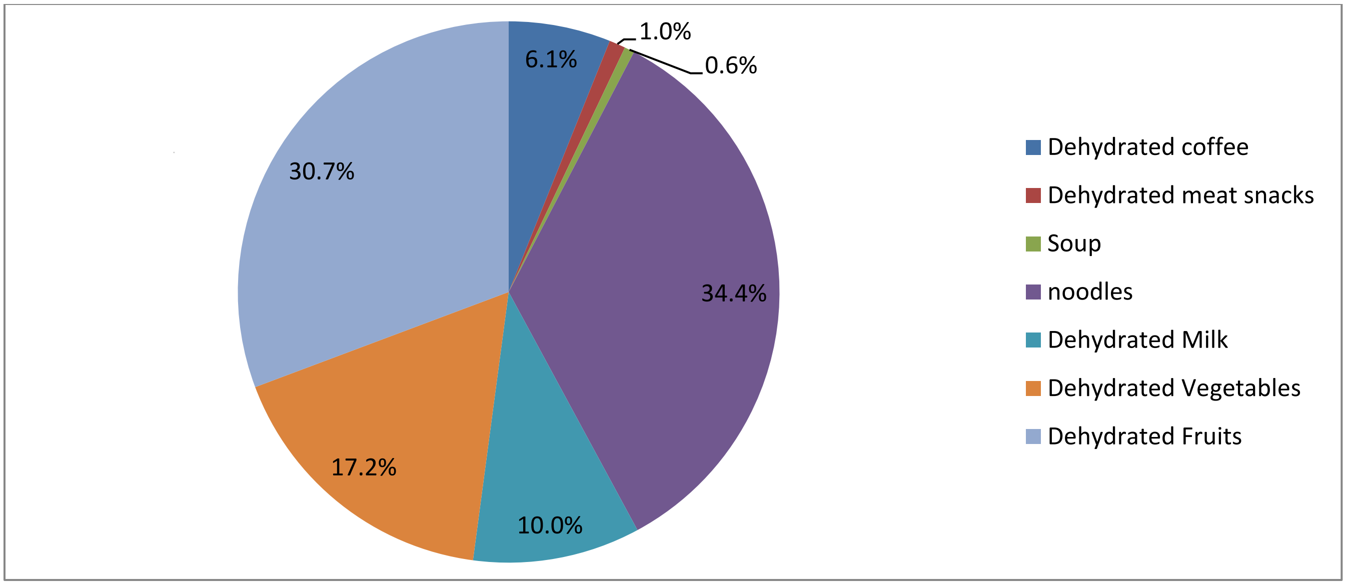


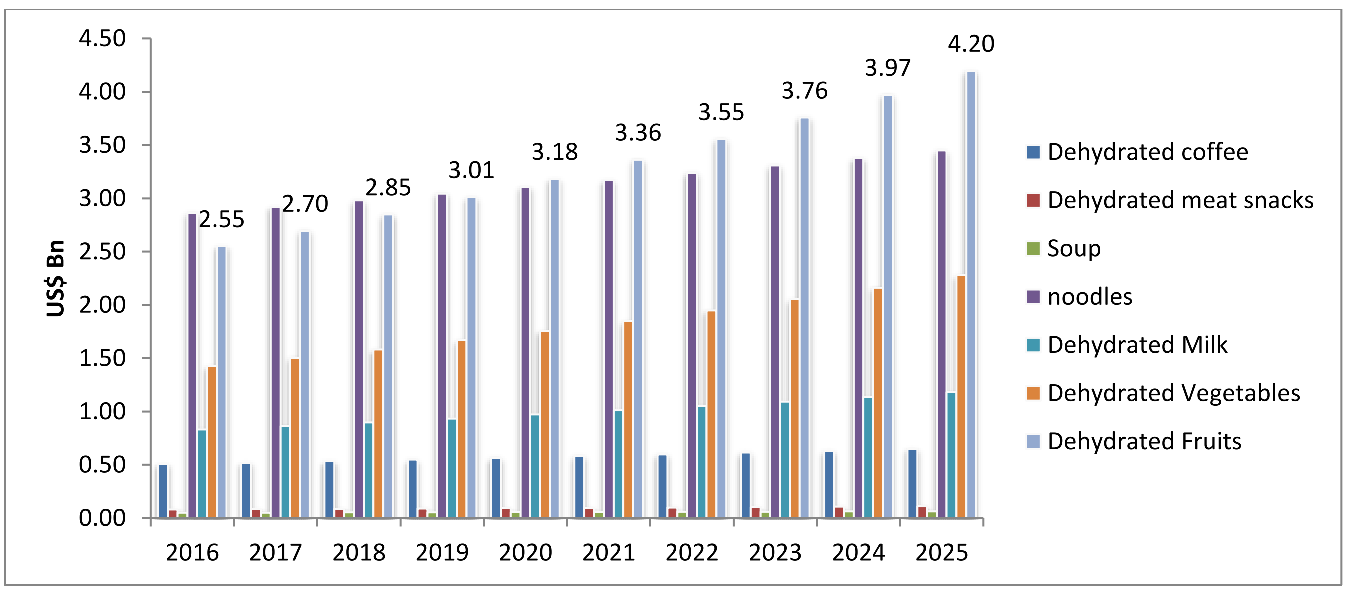
Figure above highlights the growth of dehydrated food products by the type of technology used, the market is estimated to grow for the spray dried dehydrated food products at a CAGR of 4.7% over the forecast period. Valued at US$ 3.5Bn in 2016 is anticipated to reach US$ 5.3Bn by the end of 2025. The freeze dried market is estimated to grow at a CAGR of 4.1% and the other technologies used in preparation of dehydrated food represents a growth rate of 2.4% during the forecast period.

Figure 77: Japan Dehydrated Food Products Percentage Share by Product Type



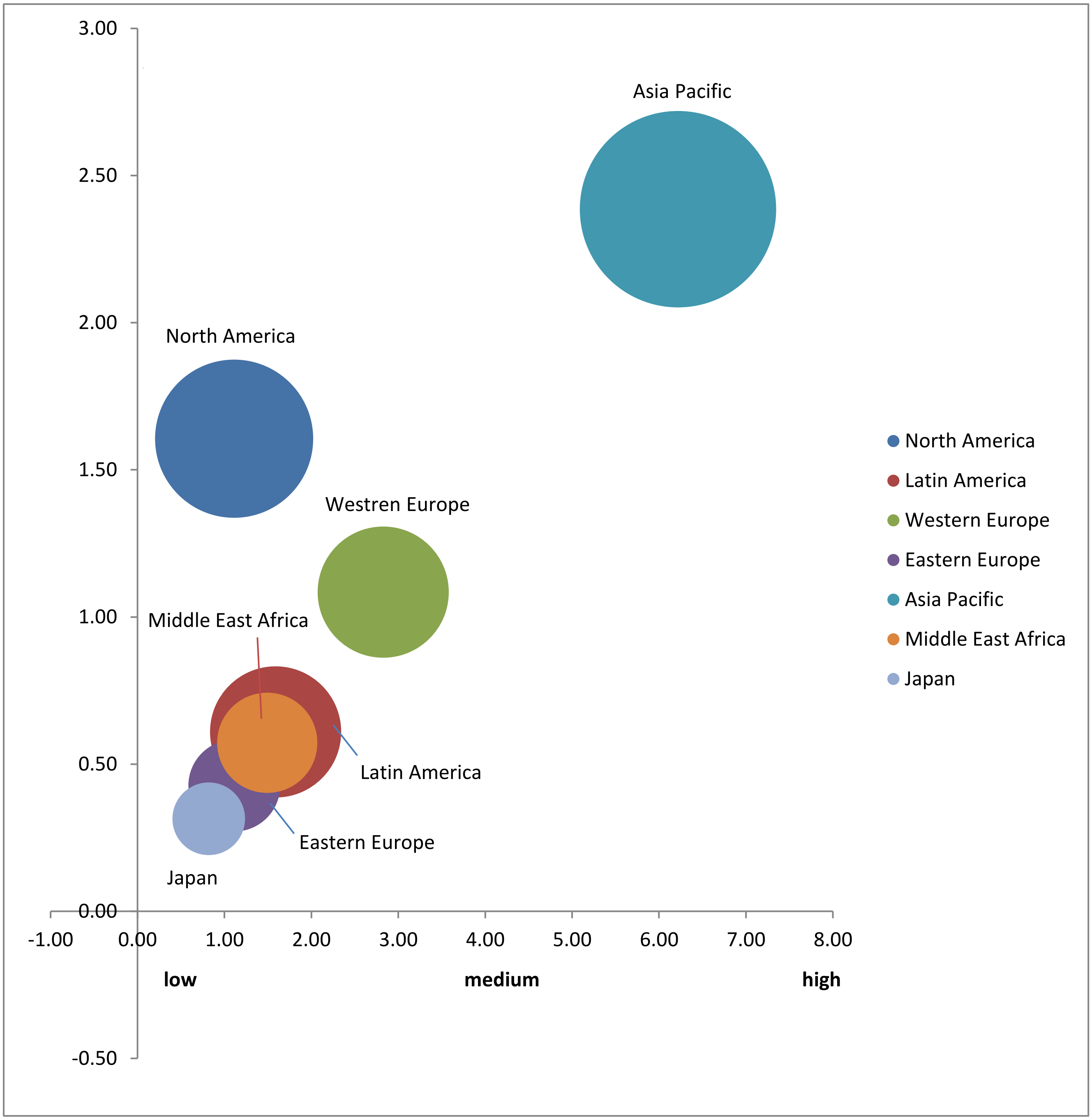
The Japan dehydrated food market is expected to witness high growth owing to high demand of instant noodles. The above figure represents the share of various segments of dehydrated food. With instant noodles accounting for 34.4% of volume share and dehydrated fruits accounting for 30.7% share of volume in the Japan dehydrated food market

Figure 78: Japan dehydrated food products market by Product Type: 2016(A)-2025(E)



Above figure represents the Japan dehydrated food product growth from 2016 to 2025; dehydrated fruits accounted for US$ 2.5Bn and are estimated to reach US$ 4.2Bn by 2025 end. The highest growth rate being registered by dehydrated fruits with a CAGR of 5.69%

Figure 79: Dehydrated food products market attractiveness index



The figure above represents the global dehydrated food market attractiveness; Size of the bubble represents the size of market. The growth rate is plotted on the y axis, Asia Pacific shows a high growth rate and market size followed by North America.

Key Findings

Largely attributed to the convenience associated with the use of dehydrated food as easy to dispense and shelf stable with a high prevalence of sedentary lifestyle, the global dehydrated food market is estimated to reach US$ 238 Bn by the end of 2025 with Asia Pacific being the most attractive market, driven by the high demand for instant noodles. Dehydrated fruits witnessing highest growth rate in developed countries with increasing demand from health conscious consumers. The most emerging online retail is a booming sales channel and is projected to show the fastest growth rate during the forecast period backed by high purchases made in developing countries through internet.

Conclusion

Dehydrated food products offer an immense opportunity for manufacturer to capitalize with the room for value creation. Improving consumer's understanding about dehydrated food will lead to substantial value creation. By communicating the health benefits of dehydrated food, manufacturers can attract a large segment of population. Current trends in the dehydrated food market such as high demand of dehydrated food in fast food chain, rising demand for dehydrated milk powder and increasing popularity of dehydrated food as camp food represents a favorable market for the global players in the dehydrated food market. This report provides the market potential of dehydrated food products and various factors driving the growth of market. Market will continue to grow in the forecast period with an estimated CAGR of 4.0%

Limitations

The study is exclusive to information available on secondary platforms such as government websites, company annual reports, press releases, media houses etc.

Although most geographical regions are covered, the data for countries such as Somalia, Congo, Zaire, Cambodia, Afghanistan, Yemen, Maldives, Sudan, etc. has not been validated due to lack of information from secondary sources

Certain economic and political factors have not been considered which could have affected the market dynamics in respective regions. For instances economic crises of 2007-2008 which led to slow growth in the European region, a linear growth is considered from the view point of future and present

Certain manufacturer, despite being large scale manufacturers of dehydrated food products have very limited presence in the social media and tracking such manufacturer was beyond the scopes of this study

Consideration of organized sector only whereas countries such as India are largely driven by the sales from unorganized sector

Conflicting set of data available

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