

# Competitor Strategies in Ingredients

August 2020

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#### INDUSTRY IMPACT

COVID-19 impact summary

The five-step consumer progression of COVID-19

### INTRODUCTION

Scope

Key findings

#### **BUSINESS STRATEGIES**

Packaged food maintains its leadership among eight industries

Total volume growth is hindered by low sales in foodservice

Givaudan: "Natural" acquisitions for expansion

Cargill capitalises on growing demand for protein

Cargill: China sits at the centre of investment for future growth

Kerry blends authenticity with functionality

Kerry gains from meat-free launches in the UK

Dupont invests in probiotics

COVID-19 strategy: identify the key categories

IFF shifts from flavours and fragrances to taste and scent

COVID-19: essentials gain while discretionary and foodservice lose

IFF to merge with Dupont's Nutrition and Bioscience unit

Ingredion focuses on speciality ingredients portfolio to drive growth

COVID-19's immediate impact on Ingredion

Royal DSM invests in "better for you"

DSM focuses on infant nutrition for future growth

Firmenich looks to partnerships for improved market response

ADM capitalises on the growing demand for ancient ingredients

Starch and sweeteners lose out from the impact of COVID-19

Tate & Lyle's growth strategy: "sharpen, accelerate and simplify"

Sucralose thrives in retail due to stockpiling

# KEY TRENDS IMPACTING THE INDUSTRY

About the strategic themes...

Strategic themes and hot topics in packaged food (1)

Strategic themes and hot topics in packaged food (2)

Examining key trends impacting ingredients

## CASE STUDIES

Demand for natural drives the growth of clean label

Givaudan strengthens its clean label credentials with acquisitions

Dupont builds up its clean label solutions with new launches

Kerry invests in acquisitions to enhance its capabilities in clean label

Tate & Lyle expands its clean label line, Claria

Supplying alternative proteins is on the agenda of big players

Givaudan looks for future protein sources

Could pea protein be the next frontier in plant-based?

Cargill to capitalise on growing demand for private label

DSM and Avril seek "Proteins of the Future"

ADM and Marfrig join forces

Kerry expands its plant-based offerings

Firmenich focuses on a better taste and texture for plant-based

Firmenich continuously promote new and ancient ingredients

Firmenich fights against waste of so called "ugly" berries

Organic is benefiting from increasing health conscious
Regulations are tightening around organic...
...which means opportunities and challenges for companies

## CONCLUSION

What's next?

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