

The European market potential for gums

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Gum arabic and guar gum are used in the production of food products because of their wide range of properties. They are mainly used because of their viscosity, as well as nutritional benefits. The majority of gums are used in the food sector, however they also have applications in other industries, such as pharmaceutical and cosmetics. The most prospective country markets for exporters of gums are western European countries.

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1. Product description

Natural gums or hydrocolloids are polysaccharides that generally contain many hydroxyl groups and are capable of increasing the level of viscosity in a solution. Natural gums have many advantages compared to synthetic polymers: they are biodegradable, non-toxic, economical and easily available in the environment. They have a wide range of applications, such as thickening agents, clarifying agents, gelling agents, emulsifying agents and stabilisers. Most natural gums come from woody elements of plants, seed coatings and seaweed.

A wide range of natural gums are available. This study focuses on gum arabic and guar gum and their use in the food industry. Gum arabic, also known as acacia gum, is a natural gum made of a sap of sub-Saharan *Acacia senegal* and *Acacia seyal* (Leguminosae) trees. Gum arabic contains glycoproteins and polysaccharides and is the original source of the sugars arabinose and ribose. It is a less consistent material than other hydrocolloids.

Gum arabic is available on the European market in an unprocessed and semi-processed form. Most of the high-grade processing of gum arabic takes place in western Europe, particularly France, which is one of the biggest processors and exporters of gum arabic in the world.

The main producing countries include Sudan, Nigeria, Senegal, Chad, Somalia, Eritrea and Mauritania. Gum arabic has a wide range of applications, as well as several advantages over gelatine, starch, and other additives used in drinks. The main uses of gum arabic in the food sector include:

- soft and alcoholic beverages, such as carbonated drinks, syrups, smoothies, beer and wine;
- dairy products, such as ice creams, yogurts, and other frozen desserts;
- confectionery and bakery products, such as sweets and pastry dough.

Gum arabic has many non-food applications in the pharmaceutical, cosmetic, printing and paper-making industries, as well as offset preparations. It was previously used as an adhesive and in the textile industry, but it has since been replaced by synthetic alternatives. Gum arabic is also used in polishes, contact insecticides and pesticides, and photographic emulsions.

Gum arabic is traded under the HS Code 13012000. As a food additive, it is recognised under E number E414. Other classifications of gum arabic include CAS number 9000-01-5 and EC number 232-519-5.

Guar gum also known as gellan gum is obtained from guar beans originally grown in India and Pakistan. Guar beans are de-husked and milled. Guar gum is used to stabilise and emulsify food and other industrial products for its beneficial properties, including water retention ability, enhancing fibre content, texturing and binding. It is used as a gelling agent, thickening agent, and as an additive to add crystallization and volume for food stuffs.

Some of the major applications of guar gum in the food industry are in ice cream, yoghurts, plant-based milk and soups. It has a low nutrient and calorie content and it is often used in fibre supplements. One non-food application is the use of guar gum as a thickener and binding agent in the pharmaceuticals and personal care industries. Guar gum is also used in fracking, which makes it dependant on oil prices.

Commercial food-grade guar gum usually contains approximately 80% guaran, 5%–6% protein, 8%–15% moisture, 2.5% crude fibre, and 0.5%–0.8% ash. It also contains small amounts of lipids composed mainly of free and esterified plant fatty acids.

Guar gum is traded under the HS Code 13023290. Guar gum's E number is 412. Other classifications of guar gum include CAS number 9000-30-0 and EC number 100-029-567.

Tip:

Review information provided by industry associations, such as the [Association for International Promotion of Gums](#) (AIPG), whose website offers a long list of scientific papers on properties and benefits of gums. The association also provides [Good Practices for Gums Guidelines](#).

2. What makes Europe an interesting market for gums?

Europe offers opportunities for exporters of gums in developing countries, including a large food and beverage processing industry. Gums have unique properties that make them attractive ingredients for European food manufacturers. Most of the gum arabic in Europe is processed in France and re-exported to other European countries, as well as overseas.

An estimated two-thirds of Europe's processed gum arabic exports come from France. Other important European processors of gum arabic are based in the UK, Italy, Ireland and Belgium. Gum arabic processed in Europe has a very high quality, when compared to gum arabic processed in India or the Sahel countries.

Processing of gum arabic in the country of origin is not very common. Industry feedback is that processed gum arabic from Sudan has a lower quality when compared to that processed in Europe. Quality is one of the key attributes European food processors are looking for. Some large food manufacturers in Europe process raw gum arabic themselves. Medium and small-size food and drink manufacturers buy processed gum arabic from European processors.

India is the main producer and exporter of guar gum in the world. An estimated 70%–80% of all guar gum supply comes from India. More than half of Indian guar gum supply comes from Rajasthan. Pakistan is the second-largest supplier of guar gum.

In 2018, the European food and drink sector generated revenues of approximately €1,205 billion, making it the largest manufacturing sector in the European Union (EU) with up to 300,000 companies. European households

spent on average 13.8% of their expenditure on food and drink products in 2017. The European organic food and drink market is the second largest in the world, expanding from EUR 31 billion in 2014 to EUR 45 billion in 2018.

Changes in lifestyle and food habits among the European population also present an opportunity for suppliers of gums, such as gum arabic and guar gum. According to industry sources, there is a growing demand for gums coming from gluten-free food products. Gum arabic has properties that enable it to be a gluten replacement. Finding sustainable alternatives for gluten is a big challenge for food manufacturers, since removing gluten from products creates quality issues, especially in the bakery sector.

Most of the demand for gluten-free products is coming from consumers who are considering a healthy lifestyle. The share of European consumers that avoid gluten for medical reasons remains low. Figure 2 shows the forecast for the global gluten-free products market between 2020 and 2025. Figure 3 shows the increase of per capita consumption of gluten-free products in European countries.

One of the main applications of guar gum in the food industry is the ice cream sector, where it is used as a stabiliser. The [global ice cream market](#) reached US\$62.4 billion in 2020 according to Mordor Intelligence. The market is expected to grow at a compound annual growth rate of 2.87% until 2026. The ice cream market was negatively affected by the COVID-19 pandemic, as consumers bought less ice cream in 2020 due to possible health concerns.

Vegan ice cream is becoming very popular. Natural gums such as gum arabic and guar gum are suitable for plant-based formulations. According to Allied Market Research, the [vegan ice cream market](#) was valued at USD 520.9 million in 2019. The market is expected to grow at a compound annual growth rate of 13.7 percent. Europe accounts for about one third of the global ice cream market.

Gum arabic and guar gum can be used as an alternative to gelatine in certain applications. Vegan and vegetarian diets are gaining popularity among the European population. Gums can also be used in vegan coatings, confectionery and candy. With the rising popularity of veganism and the plant-based lifestyle, demand for food additives such as natural gums is likely to grow over the forecast period. Figure 4 shows the increase of the plant-based market in Europe.

Figure 5 shows that imports of natural gum arabic to Europe have increased in volume in the last five years. It also shows that the extra-EU (from trade outside of the European Union) imports account for the majority of the market. Figure 6 shows that the import value has increased over the last 3 years. That the price of gum arabic has been fluctuating since 2016. This is because of the political situation in Sudan and the Sahel region, as well as disruptions in supply chains.

Over the next few years, demand for imported gum arabic into Europe is expected to remain stable. However, the import value of gum arabic is likely to fluctuate because the supply will not be stable. Various factors in the main producing countries, including political stability and climate will influence gum supply.

There are various types of gum arabic available on the market. In Europe, hashab gum arabic is more common, as opposed to gum arabic talha. Hashab gum arabic is considered to have better quality and is also more expensive than gum arabic talha. Quality is considered one of the key requirements among European buyers. European food processors mainly use spray-dried gum arabic. However, this depends on the application and the type of processor.

Figures 7 and 8 shows that imports of mucilages and thickeners of guar seeds, whether or not modified (HS Code 13023290 under which guar gum is traded), decreased in 2020. This is mainly because the COVID-19 pandemic disrupted guar gum supply chains. The majority of guar gum comes from India, and emergency measures introduced by the government disrupted the supply of these ingredients.

An estimated 70% of guar gum imports to Europe come from India, comprising approximately 40% of India's total gum exports. The leading importer of guar gum from India is the USA, followed by Norway and China. Figure 9 shows Indian exports of guar gum to European countries in 2018 and 2019.

The European Union is one of the leading importers of guar gum. A major driver of demand is its increasing number of applications as a thickener and stabiliser due to its viscosity. Guar gum is also relatively cheap. However, its price is influenced by crude oil prices, which cause fluctuations and subsequent changes in demand. The APEDA export data are higher than the Eurostat import data, as the methodology is different. APEDA also shows the volume of imports between 2018 and 2019, while Eurostat data show imports between January and December 2019.

Another driver of the demand for gums is the growing popularity of low-fat and low-calorie food in Europe. Guar gum consumption reduces risk of heart diseases by reducing the cholesterol level in body, helping to control diabetes and maintain bowel movement. Increasing health consciousness is one of the main reasons why consumers seek out healthier products. The growing popularity of gluten-free diets is also driving demand.

Tips:

Mention information on the benefits of gums in your marketing materials, such as its gluten-free applications. Make sure your claims are in line with [Regulation \(EC\) No 1924/2006 on nutrition and health claims made on foods](#).

Ensure the quality management of your gum production is up to par with established competitors. European buyers require a reliable supply of high-quality consistent gum.

Visit European trade shows when looking for European buyers. Examples of trade shows include [Food Ingredients](#) and [Anuga](#). You can also attend virtual events in case face-to-face trade shows are cancelled because of the COVID-19 pandemic.

3. Which European countries offer most opportunities for gums?

European countries are significant importers and processors of gums. France is one of the biggest processors and exporters of gum arabic in the world. Meanwhile, Germany is the largest importer of guar gum in the European market. Germany, Netherlands, UK, Italy and Belgium are the most important importers of gums for food, such as gum arabic and guar gum in Europe.

France

Table 1: Imports of natural gum arabic HS code 13012000 and guar gum (mucilages and thickeners of guar seeds whether or not modified) under HS code 13023290 to France, 2016–2020

2020	000 Tonnes	% Change Volume (2016-2020)	m EUR	% Change Value (2016-2020)	Exporters	Important Market Players
HSC: 13012	55.1	35%	60.4	-5%	Sudan (82%), Chad (11.4%)	Nexira, Alland & Robert, Laffort
HSC: 13023290	5.0	37%	14.3	40%	India (30%), Malta (18.7%), USA (13%)	

Source: Eurostat

Table 1 shows France's imports of natural gum arabic and mucilages and thickeners of guar seeds under the HS Code 13023290. It shows that imports increased in terms of volume. The value of natural gum arabic imports to France decreased slightly due to price fluctuations. Imports of thickeners of guar seeds, whether or not modified with an HS Code 13023290 are smaller. Table 1 shows increase in both value and volume between 2016 and 2020. Data from APEDA show that Indian imports of guar gum to France between 2018 and 2019 reached 4,000 tonnes.

[Nexira](#) is France's leading importer and processor of gum arabic, exporting most of the processed gum arabic to other European countries and beyond. Nexira operates a joint venture with Yagoub Group under the name [Afritec Ingredients](#), which produces processed gum arabic, but of lower quality.

Another important French gum arabic trader and processor is [Alland & Robert](#), while French company [Laffort](#) produces gum arabic stabilisers for wine production, sourcing its gum arabic from Sudan. Other importers of guar gum and gum arabic include Caldic and EMIGA.

Suppliers of gum arabic should target French buyers because France has the biggest processing sector for gum arabic in Europe. According to industry feedback, France is not such a significant importer of guar gum, but given its robust food processing sector, the country represents an opportunity for guar gum suppliers as well.

Germany

Table 2: Imports of natural gum arabic HS code 13012000 and guar gum (mucilages and thickeners of guar seeds whether or not modified) under HS code 13023290 to Germany, 2016-2020

2020	000 Tonnes	% Change Volume (2016-2020)	m EUR	% Change Value (2016-2020)	Exporters	Important Market Players
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HSC: 13012	9.0	35%	18.2	4%	Sudan (54.3%), France (23.5%), Chad (6.8%)	Roeper, Norevo, Willy-Benecke, Kimella, Suntraders Intl., Neupert Ingredients
HSC: 13023290	26.4	-1%	43.1	14%	India (85.5%), Pakistan (4%), Switzerland (3%)	

Source: Eurostat

German imports of natural gum arabic and thickeners of guar seeds, whether or not modified with an HS Code 13023290 have increased in volume in the last five years. Germany is much more an important trader of guar gum than gum arabic. However, according to German importers, the demand for gum arabic has been increasing in the last few years. German traders import smaller volumes of gum arabic, compared to the French. Official export statistics show that exports of guar gum from India to Germany reached 23,000 tonnes between 2018 and 2019.

Important market traders of gums in Germany include Roeper, Norevo, Willy-Benecke, Kimella, Suntraders Intl., Neupert Ingredients, Buxtrade, Atlantic Chemicals Trading GmbH and Jebsen & Jessen Life Science GmbH. Some German importers source processed gum arabic from other European countries and from Germany itself.

German traders also export to other European countries, such as Italy. Exporters of gums, especially guar gum, should target buyers in Germany, especially if you are able to supply larger volumes.

The Netherlands

Table 3: Imports of natural gum arabic HS code 13012000 and guar gum (mucilages and thickeners of guar seeds whether or not modified) under HS code 13023290 to the Netherlands, 2016–2020.

2020	000 Tonnes	% Change Volume (2016-2020)	m EUR	% Change Value (2016-2020)	Exporters	Important Market Players
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HSC: 13012	1.5	2%	5.1	-4%	France (75.5%), Germany (12.3%), the UK (5%)	IMCD, Caldic, Amstel Products BV
HSC: 13023290	13.0	269%	14.0	93%	Spain (64.7%), India (21.6%), Germany (4.8%)	

Source: Eurostat

The Netherlands is a leading importer of mucilages and thickeners of guar seeds, whether or not modified with an HS Code 13023290. Table 3 shows that there has been a significant growth in imports since 2016. Gums imported to the Netherlands are further re-exported to other European countries and beyond the European Union (EU). Imports of gum arabic to the Netherlands are still small, compared to countries like France and the UK.

Important traders of gums include [IMCD](#), [Caldic](#), [Amstel Products BV](#), Dutch Organic International Trade, Natural Spices, Gaaien-frutsels. Given the increase in imports of gums to the Netherlands in the last five years, demand is expected to continue. Suppliers of gums in developing countries should target Dutch importers as a way to access the European market.

UK

Table 4: Imports of natural gum arabic HS code 13012000 and guar gum (mucilages and thickeners of guar seeds whether or not modified) under HS code 13023290 to the UK, 2015-2019*

2019	Volume in 1,000 tonnes	% Volume change (2015-2019)	Value in € million	% Value change (2015-2019)	Exporters	Important Market Players
HSC: 13012	7.1	25%	12.6	-9%	Sudan (46.7%), France (21%), Chad (16.2%)	F Gutkind & Co, Morouj Commodities UK, Harvest Gum, Mayfair Commodities
HSC: 13023290	3.5	-15%	1.7	-81%	India (81.7%), Germany (9.6%)	

Source: Eurostat
* Latest available data

Table 4 shows an increase in the volume of natural gum arabic imports to the UK between 2015 and 2019. The decline in value is caused by decreasing prices in the last few years. British Imports of mucilages and thickeners of guar seeds, whether or not modified with an HS Code 13023290, decreased both in value and volume at a double-digit growth rate, due to a shift in imports to other European countries.

The UK was previously a much more significant importer of gum arabic. However, the country lost its market share to France in the last few years. Leading importers of gums include [F Gutkind & Co](#), [Morouj Commodities UK](#), [Harvest Gum](#), [Mayfair Commodities](#) and [Agrigum International Ltd](#).

Despite the increase in imports of gum arabic in the last few years, Brexit (Britain's exit from the European Union) poses a threat to supply chains of gums. It may take some time to re-negotiate trade deals with countries that supply gums to the UK. This is because supply chains are likely to be disrupted while trade negotiations take place.

Italy

Table 5: Imports of natural gum arabic HS code 13012000 and guar gum (mucilages and thickeners of guar seeds whether or not modified) under HS code 13023290 to Italy, 2016-2020

2020	000 Tonnes	% Change Volume (2016-2020)	m EUR	% Change Volume (2016-2020)	Exporters	Important Market Players
HSC: 13012	3.3	-32.7%	7.3	-41%	France (47.2%), Sudan (37.8%), Belgium (5%)	Essedielle, GASID, NSW Toscana Trading Srl, Francesco Favorito, Aromi Mediterranei
HSC: 13023290	5.9	-6.0%	11.4	5%	India (72.8%), Pakistan (14.3%), Germany (6.5%)	

Source: Eurostat

Italian imports of natural gum arabic and have been declining in the last couple of years, mainly due to a shift in imports to other European countries, such as France and Germany. Italian imports of guar gum (mucilages and thickeners of guar seeds whether or not modified) under HS Code 13023290 declined between 2016 and 2020. However, import data indicate that the volumes have been increasing in the last two to three years.

Italy imports gums from other European countries, such as France and Germany. Italian importers of gums include [Essedielle](#), [NSW Toscana Trading Srl](#), Francesco Favorito, GASID, D-Ingredients, Real Aromi, Baiocco Srl, Saini Srl and Esperis. Enologica Vason produces gum arabic stabilisers for the wine industry.

Italy is a prospective country for suppliers of gums in developing countries. Especially in the case of guar gum, demand has been growing in the last couple of years, which presents an opportunity for exporters.

Belgium

Table 6: Imports of natural gum arabic HS code 13012000 and guar gum (mucilages and thickeners of guar seeds whether or not modified) under HS code 13023290 to Belgium, 2016–2020

2020	000 Tonnes	% Change Volume (2016-2020)	m EUR	% Change Value (2016-2020)	Exporters	Important Market Players
HSC: 13012	2.7	61.4%	5.8	33%	Sudan (55%), France (30.5%), Chad (8.2%)	Danisco Belgium (DuPont), Belgoma, Joris Sweets
HSC: 13023290	2.5	-40.7%	9.4	-28%	USA (26.9%), India (22%), Germany (19.8%)	

Source: Eurostat

Belgium is an important entry point for raw materials into Europe. Table 6 shows that imports of natural gum to Belgium have increased in the last five years. More than 64 percent of natural gum arabic comes from outside of Europe (extra-EU trade). Imports of mucilages and thickeners of guar seeds, whether or not modified, under HS code 13023290 decreased in terms of volume and value in the last five years. This is because of the shift to other importing countries, such as the Netherlands. An important trader of gums in Belgium is Belgoma.

You should target mainly Western-European countries as an exporter of natural gums such as gum arabic and guar gum. The Netherlands and Belgium are leading importing countries of gums. However, much of the processing of gum arabic is done in other European countries such as France and Germany.

Tips:

See the [CBI study on tips for finding buyers in the European natural food additives market](#), where you can find here more information on how to increase your chances when targeting buyers in Europe.

Visit trade shows that focus on vegan and vegetarian diets in Europe, such as [Veggie World](#) and [Veg Fest](#). Natural gums have a wide application in vegan and vegetarian products.

4. Which trends offer opportunities on the European gums market?

Several trends in the European food market are driving the demand for gums, such as gum arabic and guar gum. Gluten-free diets and low-calorie products are gaining popularity among European consumers. Gums are used in free-from and weight control products because of their functional properties.

Rising demand for low-calorie products

According to industry sources, the growing popularity of low-calorie products is driving demand for gums in the European market. According to [a ConsumerFirst study](#), approximately half of consumers in Europe are looking to manage their calorie intake. Another [report by IRI GIRA Foodservice](#) indicates that approximately 43% of consumers are interested in the low-sugar trend and 57% of respondents are looking for low-sugar options when eating out. There is also growing demand for weight-loss products, which is also creating demand for gums. These trends are likely to strengthen demand for gums in Europe.

The low-calorie profile of gums, such as gum arabic and guar gum, as well as their high fibre content make them suitable ingredients for low-calorie and weight-loss products. Weight control products also require the use of stabilisers that thicken food, thus increasing bulk in the stomach, which gums can be used for. Guar gum also reduces risk of heart diseases by reducing cholesterol levels.

Exporters of gums in developing countries can capitalise on this opportunity by ensuring their products are of the highest quality, which is important in the production of low-calorie and weight-loss products. Exporters can do this by avoiding the contamination of gum during production, along with storing it in suitable packaging materials and conditions, which help to retain quality.

Tip:

See the [CBI study on the requirements for natural ingredients for food products](#), which provides useful information and guidance on entering the European market, including the EU regulations on using the 'low-fat' and 'fat-free'.

Rising popularity of gluten-free products in Europe

According to [Euromonitor](#), sales of gluten-free products have been rising across Europe. Sales of gluten-free products in western Europe increased by 11.7% in 2017. Research suggests that consumers see free-from foods, including gluten-free products, as more healthier than conventional foods. This consumer perception is a major driver of demand for free-from products.

Along with organic foods, health and wellness products have recorded the largest overall growth globally. According to a [Fraunhofer Institute study](#), adopting a gluten-free diet is part of one of the 50 trends influencing Europe's food sector through 2035. According to a European trader of gums, gum arabic is increasingly used in gluten-free products, mostly because it is not easy to replace gluten in formulations, and using gum arabic yields good results.

Exporters of gums from developing countries can capitalise on this opportunity by informing European buyers about the ability of gums to be used in gluten-free products for the European market. To further capitalise on this opportunity, exporters of gums should also highlight this in their marketing materials, including product portfolio and company website.

Tip:

Do not make any medical claims. Familiarise yourself on EU health claims regulation and the [list of permitted health claims](#) under EU law.

Political instability in Sudan threatens gum arabic supply chain

On 25 October 2021, a military coup took place in Sudan. The unstable political situation poses a threat to the stability of the gum arabic supply chain. The economic difficulties and the military takeover have led to violence and civil unrest. The political instability can have negative impacts on logistics. For example, the military blocked transport in and out of Khartoum and turned off the internet for almost a week.

The US and the EU are ready to withhold aid and impose sanctions on Sudan. This could lead to termination of development projects that support gum arabic production. High inflation, fuel shortages and low living standards already cause problems for importers and exporters of gum arabic.

You should try and prepare for supply issues, especially logistical difficulties. In the past, political instability in Sudan has led to an increase in the informal trade of gum arabic. It is expected that the political uncertainty will affect market prices of gum arabic. This could discourage European buyers to purchase gum arabic. European importers may look for other types of natural gums on the market.

Tips:

Make sure you inform your clients about the potential logistical difficulties you may face as a result of political instability in your country.

Try to negotiate fixed prices for a certain period of time with your buyers. This may bring some stability into your business relationship.

This study was carried out on behalf of CBI by [Ecovia Intelligence](#).

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