The European market potential for acacia gum

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Europe is the most important destination for Acacia gum. In addition to its thickening, emulsifying, and stabilising function as a safe food ingredient, Acacia gum is also recognised as a dietary fibre. Demand for Acacia gum is expected to continue to rise. Growth in this sector is driven by increasing consumer demand for natural, healthy, and better-for-you products. Key European markets for this product include France, Germany, the United Kingdom, Italy, and Ireland. The top segments are confectionery, snacks and bakery, in which Acacia gum is used for different functional and nutritional reasons.

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1. Product description

Acacia gum, also known as Acacia fibre or gum Arabic, is a natural, soluble dietary fibre derived from the sap of Acacia trees that grow in the gum belt of Africa. The different types are based on the species of the Acacia tree.

Figure 1: From Acacia tree to food and non-food products

Source: Science Direct, 2024

There are two types of Acacia gum:

- Gum Senegal: derived from the Acacia Senegal tree; this type is known for its high solubility in water and superior emulsifying properties. It is often used in food products as an emulsifier and stabiliser.
- Gum Seyal: This type is sourced from the Acacia Seyal tree and has a slightly lower water solubility than Gum Senegal. It is commonly used in applications where lower water solubility is desired.

Acacia gum is sourced in the “Gum Belt”; the growing area of Acacia trees in Africa, south of the Sahel. From Senegal to Eritrea, the harvest zone covers countries like Mali, Nigeria, Chad, Niger, Sudan, and Ethiopia. The lightest gum generally commands the best prices. The crude gum is processed mechanically into kibbled gum (crushed into smaller particles) or a powder (by milling). Finally, it can be spray-dried into a microbiologically stable, food-grade powder. Spray-drying is often done by the European importing processor. The other processing steps are usually done in the country of origin.

The use of Acacia gum

Acacia gum is a safe food ingredient. It is authorised as a food additive in the European Union (EU) and is listed as E414 in Regulation (EC) No 1333/2008 on food additives. Specific purity criteria have been defined in Commission Regulation (EU) No 231/2012. In 2017, Acacia gum was re-evaluated under Commission Regulation (EU) No 257/2010 and it was concluded that there is no safety concern when used as a food additive.

Acacia gum is commonly used in the food industry as an emulsifier, stabiliser, and thickener in different food and drink products. Its application is relatively equal across several food categories. Confectionery products, chocolate, sugar and gum confectionery are the leading products, followed by snacks (like nuts and cereal bars) and bakery products like cakes, pastries and sweet biscuits. Acacia gum has different functionalities in different applications. In chocolate, Acacia gum is used as a texturant (emulsifying and binding), glazing (creating a glossy finish of the chocolate), to prevent sugar crystallisation and enhance the shelf life. Acacia gum is used mainly in cakes and pastries as a texturant (emulsifier, stabiliser, texture improvement), glasing, and edible glue in cake decorating.

Acacia gum is recognised as a dietary fibre. It is known for its high-soluble fibre content, which can support digestive health, help maintain healthy cholesterol levels, and act as a prebiotic to promote the growth of beneficial gut bacteria. Dietary fibres are not digested and not absorbed in the human small intestine. It includes four sub-groups: non-starch polysaccharides (carbohydrates), resistant starches, resistant oligosaccharides and other components obtained from plant cell walls, like lignin. Acacia gum is an interesting food ingredient because it is completely dependent on sourcing from developing countries, and it is a natural product with no chemical processing steps involved. Traditionally, dietary fibres have been classified as soluble and insoluble, defined by their solubility in hot water. As shown in Table 1, Acacia gum falls in the same group as gum Karaya and gum Tragacanth.

Table 1: Dietary fibre classification

Fibre component	Description	Produced from	Main production areas	Characteristic

Cellulose	The main structural component of the plant cell wall.	Plants (vegetables, sugar beet, various brans)	Dominated by European players and often includes a chemical extraction production step.	Water insoluble/Less fermented
Hemicellulose	Cell wall polysaccharides, which contain a backbone of β-1,4 glucosidic linkages. Soluble in dilute alkali.	Cereal grains	Dominated by European players and often includes a chemical extraction production step.	Water insoluble/Less fermented
Lignin	Non-carbohydrate cell wall component. Complex cross-linked phenyl propane polymer. Resists bacterial degradation.	Woody plants	Dominated by European players and often includes a chemical extraction production step.	Water insoluble/Less fermented
Pectin	Components of primary cell wall with D-galacturonic acid as principal components. Generally water soluble and gel-forming	Fruits, vegetables, legumes, sugar beet, potato	Argentina, Mexico, Peru, Spain, Bolivia, Netherlands	Water soluble/Well fermented

Gums	Secreted at the site of plant injury by specialised secretory cells. Food and pharmaceutical use.	Leguminous seed plants (guar, locust bean), seaweed extracts (carrageenan, alginates), microbial gums (xanthan, gellan)	See CBI study on gum Arabic See CBI study on seaweed hydrocolloids.	Water soluble/Well fermented
Resistant Starches	Type of starch that does not get fully broken down and absorbed in your small intestine. Instead, it reaches your large intestine where it ferments and acts like fibre, feeding your gut's beneficial bacteria.	Made from native starches derived from corn, barley and oats. Can be produced using chemical, physical or enzymatic methods.	Europe and US	Water soluble/Well fermented
Mucilages	Synthesised by plants, prevent desiccation of seed endosperm. The food industry uses hydrophilic stabilisers.	Acacia gum gum Karaya gum Tragacanth	Sudan, Chad, Senegal, Mali, Nigeria, Cameroon, Kenya, Mauritania, Niger	Water soluble/Well fermented
Dietary fibres with a proven and approved prebiotic functionality	Specific soluble fibres that feed the good bacteria in your gastrointestinal tract to produce health-promoting compounds	Bananas, onion, garlic, dandelion greens Agava Jerusalem artichoke and chicory root	China, India Australia N. America and Europe	Prebiotic fibre

Source: Dietary fibres in foods: a review and The Three types of dietary fibre you need

Trade statistics used in this research are based on HS Code 13012000: Acacia Fibre / Acacia Gum / Gum Arabic.

Tips:

- Familiarise yourself with Acacia gum's beneficial properties and its advantages to the food industry. It is important to show know-how in regard to usage.
- Display detailed product information and marketing materials on your company website, such as where your Acacia gum comes from, the type and grade, and, preferably, what your company does to produce sustainable products.

2. What makes Europe an interesting market for Acacia gum?

Europe is an attractive market for Acacia gum due to its significant demand in the food and beverage sector, where the gum is valued for its functional properties like improving texture and serving as a source of dietary fibre. Europe's strong position in international trade and advanced processing infrastructure makes it a key destination for suppliers of Acacia gum.

Acacia gum finds a vast market in the European food and beverage industry

The European food and drink market is one of the largest in the world. According to Food and Drink Europe, the industry has a turnover of nearly €1.1 trillion. Many European food products use Acacia gum as a texturant and soluble fibre. In chocolate and sugar confectionery, Acacia gum is often labelled as gum Arabic (and sometimes as Acacia fibre) and is used as a binder and emulsifier. Acacia gum is frequently used in cereal bars and breakfast cereals to increase fibre content. The dosage of Acacia gum as a food additive varies depending on its use and functionality, both functional and nutritional, typically ranging between 1% and 6%.

In the EU, products can carry a 'source of fibre' claim if they contain at least 3% fibre, while a 'high fibre' claim requires the product to have a fibre content of 6%. The average adult should consume about 25-30 grams of fibre daily, but most European consumers only consume 15-20 grams daily. This creates a ‘fibre gap’. Acacia gum is one of the ingredients that can help close this gap.

The global industry is estimated to process around 85,000-95,000 tonnes of Acacia gum, of which approximately 60-70% (about 62,000 tonnes) is used by the food industry. The market was valued at €363 million in 2022 and is expected to grow to €585 million by 2030, reflecting an annual growth rate of 6.1%. Nexira is the most significant player, holding about 40% of the market share. It has processing facilities in Europe (France) and India. The vertically-integrated company controls the value chain by sourcing from African countries.

Product development with Acacia gum is prominent in Europe’s food processing industry

Europe is a big target market for Acacia gum because of its developed food processing industry. Product development with Acacia gum continues, and the number of Acacia gum-based product launches is the highest in the UK, Germany and France.

Most European food and drink products (96%) have Acacia gum labelled as gum Arabic. However, the remaining products labelled as containing Acacia fibre (4%) have shown relatively high growth, averaging 11.2% per year between 2019 and 2023.

Since 2009, the European Food Safety Authority (EFSA) has recognised Acacia gum as a dietary fibre. However, until now, claims of ‘added-fibre’ or ‘high-fibre’ are rarely found on Acacia gum-based products. About 4% of the

products have a fibre claim on the consumer package; typically cereal bars and breakfast cereals.

Source: Mintel GNPD, 2024

According to the product launch data of Mintel GNPD, the European food industry is quite concentrated in terms of Acacia gum. The top-30 food and drink companies accounted for one-third of all launches of products produced with Acacia gum. Note that this analysis only shows the level of innovation and not the volume of ingredients used because the Acacia gum dosage might be different for different uses.

The biggest branded innovators using Acacia gum are multinational chocolate confectionery companies like Ferrero, Mars and Nestle. The Coca-Cola Company and PepsiCo use Acacia gum in soft drinks. In addition, there are big European retail chains with private-label products containing Acacia gum, like Lidl, Marks & Spencer, Aldi, Sainsbury's and Asda. Private label products account for about 23% of Acacia gum-based product launches.

Europe is an important destination in the Acacia gum trade

In 2023, Europe imported 98,700 tonnes of Acacia gum, reflecting a growth rate of 2.8% between 2019 and 2023. In 2023, €246 million worth of Acacia gum was imported into Europe. Some 46% was traded within the EU, and the remainder came mainly from Sudan and Chad.

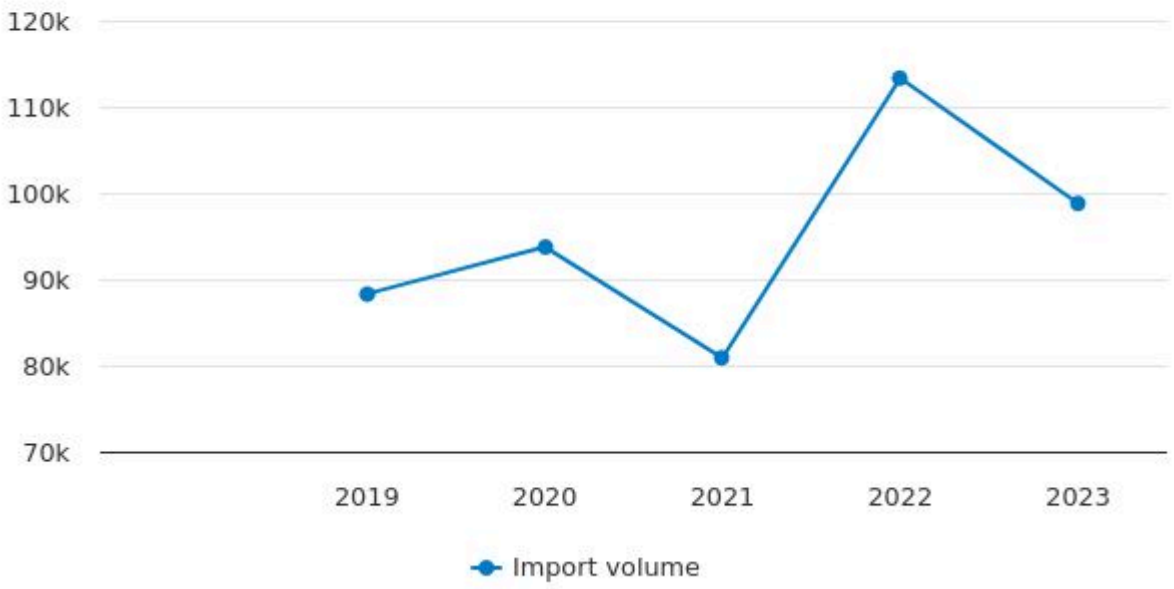
The Acacia gum-processing industry is highly concentrated, with some vertically-integrated companies operating facilities in the UK, France, Germany and Italy. There is room for companies that can deliver consistent, high-quality products both in terms of sourcing outside of Sudan and Chad, and from a European processing perspective.

It should be noted that this import volume cannot be directly linked to the consumption volume because it includes both crude and processed Acacia gum, and there are many re-exports both within Europe and across continents (see Figure 4). An overview of the estimated local consumption or usage by the food and non-food industries of the biggest European countries is given in the chapter below in Table 2.

Examples of European food ingredient companies importing directly from developing countries are Nexira and Alland & Robert (France), Agrigum and Morouj Commodities UK Ltd (UK) and Kerry with headquarters in Ireland but import and production location for Acacia gum in the UK, RR in Italy, and Norevo in Germany.

Figure 3: European imports of Acacia gum, import volume

in tonnes



Source: ITC Trademap, 2024

Source: ITC Trademap, 2024

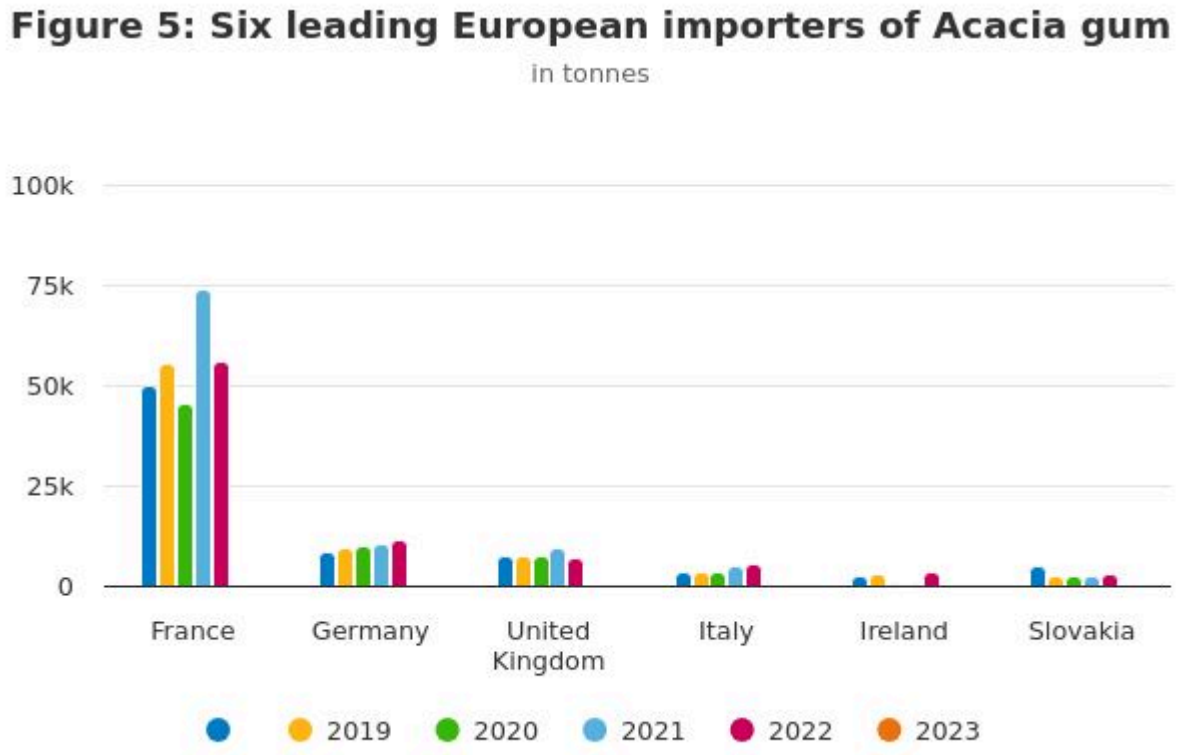
Tips:

Check the CBI study on the demand for natural food additives in the European market to gain more in-depth insights into the key drivers of growth in this sector.

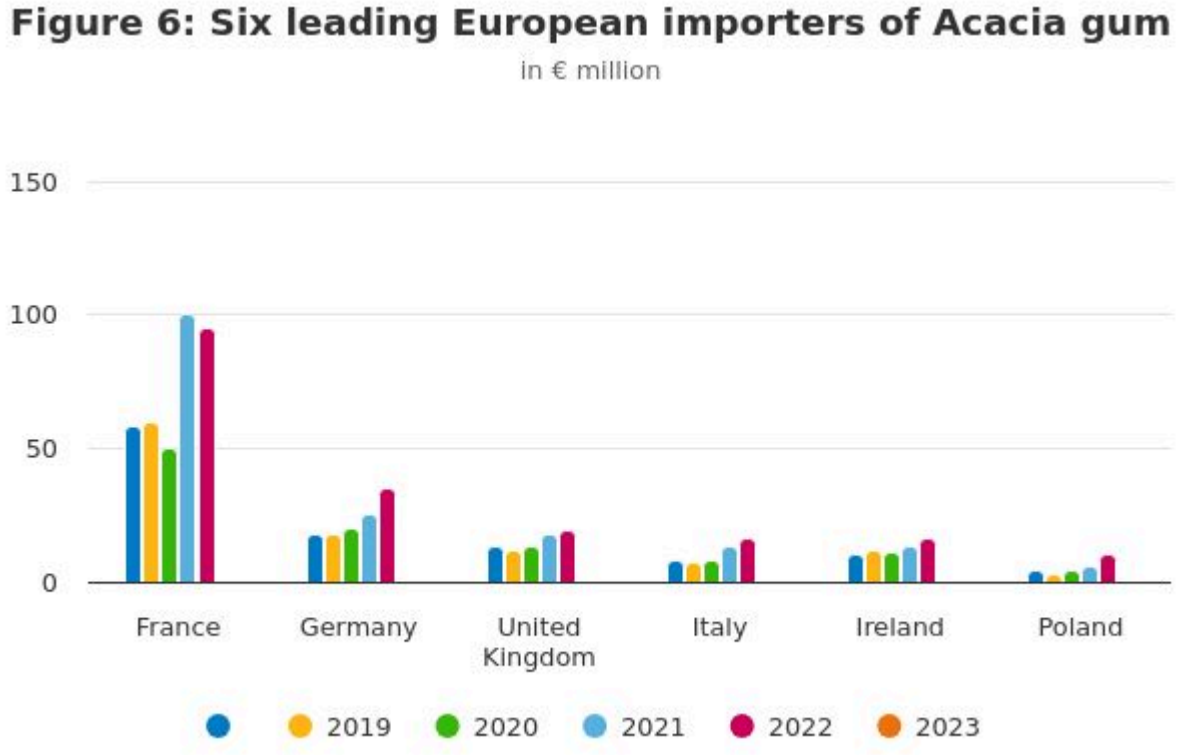
Visit online sources such as the ITC Trade Map or EU Access2Markets to do your research with trade statistics on Acacia gum.

Join texture expert networks like IMR to stay up to date on market trends and competitive trends.

Follow the latest developments in the European food and beverage market. Inform yourself of trends, market requirements, product launches, and other market developments. You can do so by checking online websites such as Food Navigator and Food Ingredients First.

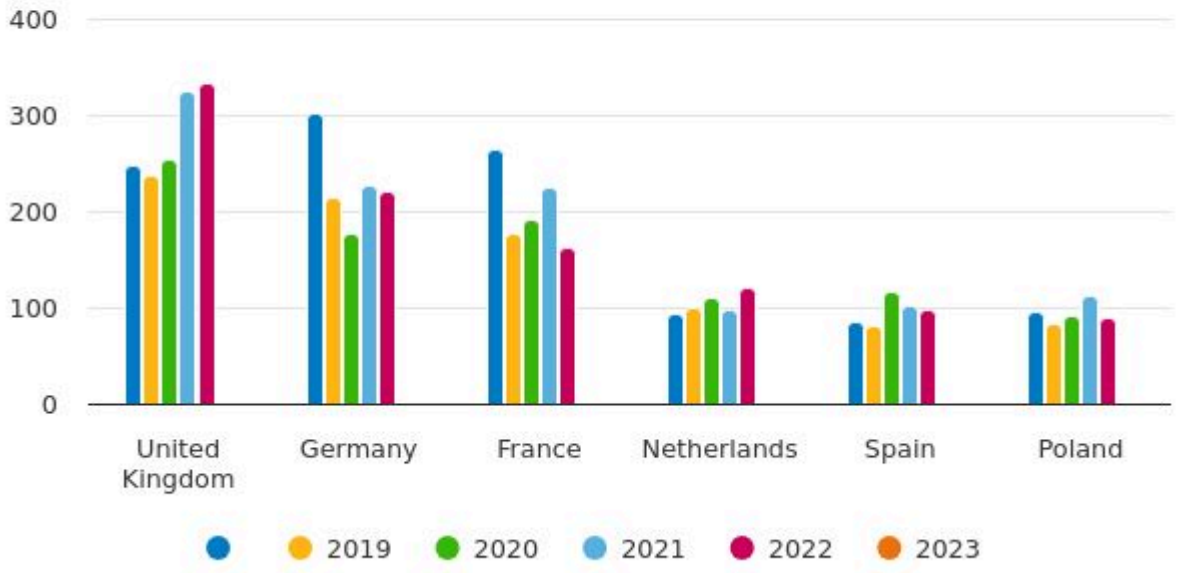


Source: ITC Trademap, 2024



Source: ITC Trademap, 2024

Figure 7: Six leading European countries in Acacia gum-based food and drink product development
In number of retail product launches



Source: Mintel GNPD, 2024

Table 2: Overview of the key data for the most attractive target countries

Country	Import volume (2023, tonnes)	Export volume (tonnes)	Net consumption (tonnes)	Growth in import volume (2019 – 2023, %)	Number of product launches	Main Acacia gum activity (Processor, industrial user, trade hub)
France	55,754	45,886	9,686	2.8%	1,164	Processor / Industrial user
Germany	11,443	4,139	7,304	8.2%	1,172	Processor / Industrial user
UK	6,716	1,657	5,059	-1.4%	1,423	Processor / Industrial user
Italy	5,080	3,339	1,741	11.3%	413	Processor Industrial user

Ireland	3,006	33	2,973	6.4%	142	Industrial user
Slovakia	2,917	398	2,519	-10.3%	148	Industrial user
Poland	2,633	43	2,590	12.5%	491	Industrial user
Spain	2,258	430	1,828	6.3%	511	Industrial user
Switzerland	1,810	26	1,784	0.3%	255	Industrial user
Netherlands	1,389	732	657	-6.8%	535	Industrial user Trade hub
Belgium	1,230	1,101	129	5.0%	241	Trade hub

Source: Several, see details elsewhere in this report

France: A key consuming market, processor and trade hub for Acacia gum

With 68 million people, France has the second-largest population in the EU. The biggest European Acacia gum processors, Nexira and Alland & Robert, are located in France, which is why there is a high volume of Acacia gum imports and exports. France also has a large food and drinks processing industry, processing the Acacia gum into food products and making it the biggest user of Acacia gum in Europe.

In 2023, France imported 55,754 tonnes of Acacia gum worth €95 million. About 96% (53,600 tonnes) came from developing countries, mainly Sudan and Chad. The remaining imported volume came from other EU countries. Since 2019, the total import volume has shown an average annual growth of 2.8%.

In 2023, France also exported 45,886 tonnes of Acacia gum, leaving 9,686 tonnes for local use by the food and non-food industries. France is home to the port of Marseille, which is the fourth-largest in Europe and contributes to France's role as an important trade hub.

Mintel GNPD data analysis shows that 'organic' and 'sustainable' seem to be the most important marketing positionings for French Acacia gum-based consumer products. About 30% of French product launches are organic, 18% are marketed as 'sustainable', while 18% are 'environmentally friendly'. Acacia gum is labelled as gum Arabic for 87% and the remainder as Acacia fibre. Uses vary by labelled ingredient. Gum Arabic is mainly used in confectionery, while Acacia, labelled as fibre, is mainly used in sweet biscuits and cereal bars.

Branded products account for 84% of Acacia gum use; and the biggest users include Ferrero, Mondelez, and Nestlé. Private label products account for 16% of Acacia gum applications. Large retail chains using Acacia gum are Scamark, Interdis, Carrefour, Delhaize, Auchan, and Intermarche.

Examples of French Acacia gum importing companies are:

- Nexira, founded in 1895, and previously known as Iranex. It also still uses the name of its biggest subsidiary, CNI (Colloid Naturels International). They claim to be the global leader with a 40% market share in Acacia gum, producing some 35,000 tonnes. Nexira has processing-facilities in Europe (France) and India. It has significantly increased its production capacity in France to meet the growing demand for Acacia gum, especially after the US FDA granted its dietary-fibre status.
- Alland & Robert specialise in natural plant exudates for the food, cosmetics, and pharmaceutical industries, strongly focusing on Acacia gum. In 2015, Alland & Robert produced 13,000 tonnes of Acacia gum. The company has two factories in Normandy, and kibbling and sorging facilities in Chad, Mali and Senegal. For its organic product line, Alland & Robert has a partnership with Ferlo Gommes in Senegal. Alland & Robert guarantees a minimum fibre content of 90% for all products of the Acacia Gum range (international method AOAC 985-29).

Germany: Processor, re-exporter and primary user in confectionery, snacks and bakery

With 84.3 million people, Germany is the largest EU food consumption market. It is also a major re-exporter of food ingredients and processed foods.

In 2023 Germany imported 11,443 tonnes of Acacia gum, worth €35.3 million. The country exported 4,139 tonnes, resulting in a net consumption of 7,304 tonnes in 2023. Germany purchased 73% of its Acacia gum imports directly from the developing countries that produce it, and mostly from Sudan (55%). Since 2019, the total import volume has shown an average annual growth rate of 8.2%.

According to Mintel GNPD data, 1,172 Acacia gum-based products were launched in Germany in the last five years. In food and drink products, 97% are labelled as gum Arabic, while only 3% are labelled as Acacia gum. Most Acacia gum is used in chocolate, nuts, sugar confectionery, and bakery products. When labelled as Acacia gum, the ingredient is mostly found in plant-based dairy products, biscuits, and cereal bars.

An analysis of Acacia gum-based food and drink product launches in Germany shows that branded products account for 80% of Acacia gum-based products. The biggest users include Mars, Lindt & Sprüngli, Ferrero, Dr August Oetker, and Zotter. Private-label products account for the remaining products, and examples of German retailers using Acacia gum are Lidl, Aldi, and Penny Markt.

In 2023, 21% of German Acacia gum-based products were marketed as sustainable. The companies mentioned above have a demonstrable strategy for more sustainable product development. For instance, look at the sustainable strategy of Dr. Oetker, a German food processor using Acacia gum in their desserts and baking mixes.

Examples of German Acacia gum importers are:

- Willy Renecke: supplier of gums for food and non-food applications. They have been in the business since 1954, processing natural hydrocolloids, including gum Arabic. They purchase their Acacia gum directly from the ‘gum belt’. Their subsidiary, SprayCom GmbH, located near Hamburg, specialises in spray-dried gum Arabic powder production.
- Roeper: buys natural raw materials from around the world, including gum Arabic.
- Norevo: is an established and globally-operating family business specialising in the trading and processing of natural raw ingredients, including gum Acacia. Through a network of partners, Norevo's main supplying countries are Sudan, Chad, and Nigeria.

UK: Processor, re-exporter and consumer of Acacia gum in confectionery,

bakery and snacks

The UK is the third-largest European country by population, with 67.7 million people. In 2023, the UK imported 6,716 tonnes of Acacia gum worth €18.5 million. The UK sourced 65% of its Acacia gum imports directly from developing countries, mainly Sudan (3,438 tonnes) and Chad (925 tonnes). The UK also imported a relatively high amount from France (2,190 tonnes). UK imports have grown from 2019 to 2022 but declined in 2023. Through several companies, the UK is also a local processor of Acacia gum.

According to Mintel GNPD data, 1,423 Acacia gum-based products were launched between 2019 and 2023. In 98% of cases, Acacia is labelled as gum Arabic. Most Acacia gum is used in chocolate, bakery products, and snacks.

In the UK, branded Acacia gum-based products only account for 40%, and the biggest users are Mars, Nestlé and Ferrero. The private-label applications accounted for 60% of the Acacia gum-based food and drink product launches in the UK. The biggest retailers using Acacia gum in their food and drink products are Sainsbury's, Asda and Marks & Spencer.

Mintel GNPD data analysis shows that for UK Acacia gum-based consumer products, 'vegetarian', 'no preservative/additives' and 'sustainable' are the most important positioning claims. An estimated 6% of products show a claim related to 'added fibre' or 'high fibre'.

Figure 8: UK product examples of Acacia gum-based products with a high/added fibre claim

Source: Mintel GNPD

Examples of Acacia gum processors or importers in the UK market are:

- Agrigum is dedicated to Acacia gum for use in food and non-food. The company specialises in spray-dried and agglomerated Acacia gum products. It is also involved in the production of other hydrocolloids and associated blends to meet specific customer requirements. Besides focusing on sustainable, environmentally-friendly products, the company is an expert in Acacia gum functionalities for different uses.
- Kerry: Kerry's European Acacia gum processing facility is located in the UK, from where Kerry sells Acacia gum under the brand name Emulgold™.
- Morouj Commodities UK Ltd: with roots in Africa and the Middle East, the company offers a range of Acacia gum products, from Certified Organic raw Acacia gum to spray-dried Acacia gum powders produced in the UK.

Italy: Processor and Acacia gum consumer for confectionery, meat replacers and cereal bars

Italy has a population of 58.8 million people; in 2023, it imported 5,080 tonnes of Acacia gum worth €16 million. Italy sourced 84% of its Acacia gum imports from France and only 16% directly from developing countries, mainly Sudan. Since 2019, total imports have grown by an average of 11.3% annually. According to import and export data, Italy mainly imports its Acacia gum from Nexira (France), which also has activities in Italy.

According to Mintel GNPD data, 413 Acacia gum-based products were launched in Italy between 2019 and 2023. 92% of these products were labelled as gum Arabic, and 8% as Acacia gum. Most Acacia gum is found in chocolate, cereal bars, meal replacement drinks, soft drinks, and sugar and gum confectionery products, together accounting for over 50% of the products.

In Italy, most Acacia gum is used in food and drink products marketed as allergy-free and gluten-free, which account for 40% of product launches. Additionally, 'sustainable' is an important positioning accounting for 15% of the products.

An example of a company handling Acacia gum in Italy:

- RR srl: imports gum Arabic directly from Sudan and is the exclusive partner of Elanan Trading, Export and Import Co. They offer a range of Acacia gum products, including raw material and processed products in kosher, halal, and organic-certified qualities.

Ireland: Demands Acacia gum for its bakery and confectionery industry

With 5.2 million inhabitants, Ireland is a relatively small country. As the fifth-largest European importer of Acacia gum, Ireland imported 3,006 tonnes worth a total of €16 million in 2023. Ireland imported 95% of its volume from European countries, mainly France (Nexira) and the UK (Kerry). Only 1% of the Irish import volume was purchased directly from emerging country Türkiye. Since 2019, the total import volume has shown an average annual growth of 6.4%.

In 2023, Ireland exported 33 tonnes of Acacia gum, producing a local consumption of 2,973 tonnes. This means that 98% of the imported volume is used for local processing into food and non-food products.

Ireland is a relatively small food and drink consumption country. All products with the ingredient were labelled as gum Arabic. They were mainly used in bakery, chocolate, soft drinks, and sugar confectionery products. Mintel GNPD data shows that 51% of Acacia gum-based products are considered 'vegetarian'. Also, a clean label seems important, with 23% of the products claiming to contain no additives and/or preservatives.

Looking at the food applications for Acacia gum, private labels account for 49%, which is relatively high compared to other European countries.

Important players in the Acacia gum market in Ireland:

- Kerry processes Acacia gum in the UK. In addition, the company has blending operations in Ireland, where Acacia gum might be blended with other dietary fibres or hydrocolloids into more custom-made solutions.

Slovakia: demands Acacia gum for its confectionery, snacks and cereal industries

In 2023, Slovakia imported 2,917 tonnes of Acacia gum worth €8.3 million. Slovakia purchased 58% of its Acacia gum imports directly from Sudan. Since 2019, the Acacia gum import volume has shown an average annual decline of 10.3%.

In 2023, Slovakia exported 398 tonnes of Acacia gum. These trade figures indicate that most of the Acacia gum is used for local processing in food and non-food products.

According to Mintel GNPD data, Acacia gum is used in Slovakia in chocolate, sugar confectionery, bakery, carbonated soft drinks, and snacks. Branded companies using Acacia gum are Ferrero, Mars, and Nestle. Of these Acacia gum-based product launches, private labels account for 14% of the products. Retail chains such as Lidl and Tesco are leading in private label use.

Tips:

- Determine which market offers the best opportunities. For example, the chocolate industry uses Hashab grade gum Arabic, which is derived from the Acacia senegal tree and has high gelling properties. The biggest chocolate producers are based in Germany, Belgium, Switzerland and Italy.
- Start with interviewing the end-user, which in the above example is the chocolate manufacturer, ask about their needs, show what you can offer and define a business offer. To better understand each respective food manufacturing industry, you can find more information on the website of Food Drink Europe.
- Read the CBI study on tips for finding buyers on the European natural food additives market for information on how to approach European buyers successfully.
- Visit trade fairs and/or check their exhibitor lists to identify interesting buyers in individual European countries. Examples include Food Ingredients Europe, Anuga and SIAL for food products and ingredients, and Biofach specifically for organic products and ingredients.

3. Which trends offer opportunities or pose threats in the European Acacia gum market?

There are opportunities in the European Acacia gum market due to trends such as the clean label movement and the increasing demand for natural and sustainable ingredients. Additionally, the rise of vegan and plant-based diets, alongside a preference for organic products, is also helping to build demand for Acacia gum. However, threats to Acacia gum production persist, including the impacts of climate change, deforestation, and political instability in key sourcing regions, which could disrupt supply chains and affect availability.

The growing demand for natural and organic ingredients

Demand for natural ingredients in Europe is growing. Food companies are reformulating their product compositions with natural ingredients in response to this trend. The clean label movement is closely linked to trends for natural, organic, and sustainable ingredients. Simply put, clean-label food is perceived to be made with clean, natural ingredients easily recognised by customers. Clean-label food and drink products are natural or synthetic-free, free from artificial ingredients and minimally processed.
Willy Benecke, a German Acacia gum processor is an example of a company that focuses especially on the clean label and sustainable opportunities.

There is also a growing interest in organic products and ingredients that is due to rising health awareness, environmental concerns and government support. The European organic food and drink market is expected to continue to grow. EU Organic retail sales 2022 were €45.1 billion and 53.1 billion in Europe. The percentage of organic gum Arabic can vary, but it is generally estimated that a significant portion of the gum Arabic on the market is organic. This is because gum Arabic is harvested from wild Acacia trees, which are often grown without synthetic fertilisers or pesticides. However, specific figures on the exact percentage of organic gum

Arabic are not readily available.

Sustainable sourcing and transparency are vital

With Acacia gum being sourced from African countries, Fairtrade is also an important issue. Fair trade practices ensure that the producers, often small-scale farmers in the Sahel region of Africa, receive fair compensation for their labour. This helps improve their livelihoods, supports sustainable farming practices, and promotes social and economic development in their communities. Fair trade also emphasises transparency and traceability in the supply chain, ensuring that the Acacia gum is sourced ethically and sustainably. This can lead to higher-quality products and more stable market conditions for both producers and consumers.

The Network for Natural Gums and Resins in Africa (NGARA) is a Pan African organisation assisting African producing countries and partners to formulate a coordinated strategy for the sustainable development of their natural gums, including Acacia gum.

Sustainable sourcing is key in Europe. Consumers want to know where their food and ingredients come from, who has produced the ingredients, under which conditions, and how this impacts the planet. Consumers are concerned about global climate change and expect suppliers to demonstrate greater Corporate Social Responsibility (CSR).

Non-governmental organisations (NGOs) have often taken a lead in encouraging companies to improve their CSR and source sustainably. Together with leading brands and manufacturers, they originally focused on commodities, which allowed them to maximise impact. Today, manufacturers are also applying their sustainable sourcing strategies to ingredients that they only use in small amounts, such as Acacia gum.

Acacia gum is considered sustainable for several reasons:

- Environmental benefits: Acacia trees are crucial in improving soil fertility by fixing nitrogen, which helps restore and maintain soil health. This is particularly important in arid and semi-arid regions where soil degradation is a significant issue.
- Prevention of desertification: Acacia trees help prevent desertification by acting as windbreakers and reducing soil erosion. Their deep root systems stabilise the soil and help retain moisture.
- Sustainable harvesting: Acacia gum is harvested without harming the trees. Farmers make small incisions in the bark to collect the sap, allowing the trees to continue growing and produce gum year after year.
- Economic and social impact: The production of Acacia gum provides a vital source of income for local communities in the Sahel region. It supports livelihoods and contributes to poverty relief in these areas.
- Natural and GMO-Free: Acacia gum is a natural product that is not chemically or enzymatically transformed. It is also free from genetically-modified organisms (GMOs), making it an environmentally-friendly choice.
- Organic: Acacia gum can be 100% organic. However, based on Mintel's analysis of retail product launches, we conclude that only 1.6% of the Acacia gum-based food and drink products are marketed as organic.

One example of a company demonstrating transparency in safety and sustainability solutions is Nexira, a leading global Acacia gum company with facilities in France that sources from the ‘gum belt’ covering Sudan, Chad, Nigeria, Mali and Senegal. The company is involved in sustainable development in Africa with the NGO SOS SAHEL and its partners. They combine economic and social development for local populations with environmental protection. Since 2009, the Acacia Programme has focused on several topics: increasing the production of Acacia gum, reinforcing the value chain, empowerment of women, and the sustainable management of local resources. Another example is Foga from Sudan. This company is directly involved in cultivating and processing Acacia gum, and also engages in reforestation projects, partnering up with organisations like Ecosia for planting Acacia trees.

Sedex (Supplier Ethical Data Exchange) is also relevant for Acacia gum. Companies like Alland & Robert and Nexira, which purchase and produce Acacia gum, often use Sedex to ensure ethical and sustainable practices

throughout their supply chains. Sedex helps these companies manage their performance in terms of labour rights, health & safety, the environment, and business ethics.

Figure 9: Alland & Robert: Supply chain and sustainable sourcing in Africa explained

Source: Alland & Robert YouTube channel, 2024

Growing market for vegan (plant-based) products

The European market for plant-based foods grew by 21% between 2020 and 2022 to reach a record of €5.8 billion. Acacia gum is derived from plant material and is considered a vegan food ingredient. Therefore, depending on the functionality needed, it is a good alternative for chemical and animal-based ingredients like gelatine. Gelatine is made from animals, while Acacia gum is harvested from the sap of the Acacia tree, which makes it very suitable for the high-growth dairy alternatives markets and other vegetarian and vegan product groups.

Threats to Acacia gum production are related to climate change, deforestation and political instability

Although demand for Acacia gum is expected to continue rising steadily in the coming years, growth and development face various challenges, such as environmental factors (climate change and desertification), political instability in African countries like Sudan and Chad, diseases (pests and invasive species), and market fluctuations.

Tips:

Be transparent and communicate the sustainable and ethical aspects of your production process. Work in local partnerships and programmes for improvement. Learn about the goals that are set

globally and learn from the solutions of other industries. To be a successful player in the Acacia gum market, sustainability and transparency about the origin and the production process are key. This means you must prove and communicate a traceable chain back to the raw materials.

Look for potential partners to improve sustainability. Use available programmes and subsidies from governmental or non-governmental organisations for investments in sustainability. For more information, see websites such as the Netherlands Enterprise Agency or the German Ministry for Economic Cooperation and Development.

Promote your products as plant-based instead of vegan. This will prevent the focus on the vegan niche market, focusing instead on the overall healthy food market.

Familiarise yourself with the European trends that match with the properties, functionalities and labelling options of Acacia gum. Some information is gathered in opportunities for natural food additives in plant-based foods.

In addition to the fibre content, Acacia gum also adds specific functionality to food and drink products. A partnership with an importer with strong application capabilities and a network is highly recommended.

ProFound – Advisers In Development carried out this study in partnership with Monique van der Wouw of Wouw Food Market Analysis on behalf of CBI.

Please review our market information disclaimer.