Let Them Eat Cake – Gluten-free That Is

A Look at What’s Driving the Gluten-free Market

Bread products, cookies and snacks dominate the gluten-free food and beverages market in Canada, according to a 2016 Mordor Intelligence report, Canada Gluten-Free Foods and Beverages Market Segmented by Type (2018-2022). The report estimates the market share for these groups represents about 26 per cent of the 2016 total, with the probability of posting the fastest CAGR during the 2016-2021 analysis period.

“The market for gluten-free foods and beverages has undergone a radical change from being considered specialty niche products to becoming mainstream products,” states the report. “Millions of people around the world have started consuming gluten-free products, not only because of being diagnosed with celiac disease but also because of a general perception of maintaining better health.”

The Numbers Have It

Paul Vaillier, president & CEO, Allergen Control Group Inc., speaks of the dramatic rise in sales of gluten-free products. “The Canadian gluten-free market has experienced significant growth in sales, soaring from $178.5 million in 2008 to nearly $450 million in 2013,” he states. “Growth is forecasted to increase to about $812 million in 2017.”

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Valder suggests that the only limit to this growth is a medical cure for celiac disease and/or non-celiac gluten sensitivity.

Emily Kaufman, president, Emport, LLC, comments, “I don’t see this community—or the family and friends who want to share meals with gluten-free people and who shop accordingly—going away any time soon,” she says.

Kaufman admits that producing these types of foods may be an demanding process but one that is very worthwhile.

“Creating safe gluten-free food can be incredibly rewarding but it does take some real dedication to get a gluten-free program up and running,” she says. “Even if a processor plans to make their facility entirely gluten-free, they still must truly understand every point in their supply chain. Where do the ingredients come from? What other ingredients are processed on the same equipment? What other crops are grown in those fields? How are their supplies ensuring that the products are truly gluten-free?”

Kaufman suggests that regardless of what a supplier may claim, it’s often good practice to test risky ingredients for gluten when they arrive.

“Better to spend 20 minutes at the beginning than to have a recall situation at the end,” she advises. Adding that rapid tests like her company’s GlutenTox Pro can help. Especially in shared facilities, as a way to confirm that surfaces are clean, ingredients are uncontaminated, and finished products have not been exposed to gluten along the way.

To Certify or Not to Certify

Valder also points out some of the issues inherent in producing gluten-free products.

Managing gluten cross-contamination and innovative product development are two big challenges, he says, as are the varied regulations between countries and the cost of implementing (and ongoing support) for a gluten-free management system, such as coaching, training, implementation, testing and auditing.

“We estimate that of all gluten-free consumer packaged goods products, approximately 50 per cent are certified, as most major supermarkets require third-party certification,” he states, adding that the benefits of certification include reduced risk in recall, being socially responsible and building customer loyalty. “Certification can take between two weeks for a random end product lab test and certificate of authenticity, and up to three to six months for a respected third-party management system certification.”

The Canadian Hemp Trade Alliance notes that hemp processing facilities are generally gluten-free.

The Natural Way

One of the main alternative ingredients in gluten-free foods and beverages is hemp.

“Consumers are attracted to hemp as a natural source of protein in the oil cake and a complete complex of amino acids in the oil,” says Russ Crawford, president, Canadian Hemp Trade Alliance. “Not only is hemp gluten free but it is also dairy free and free of allergens.”

According to Crawford, Canada currently produces approximately one million pounds of hemp seed, with a farm-gate value of $6 million.

“The food processing sector is a relatively easy entry point for hemp processors,” says Crawford. “They must apply for and be granted a processing license from Health Canada. This may change under new regulations expected in the late summer of 2018.”

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Crawford goes on to say that hemp processing facilities are generally gluten-free. “Because hemp processing facilities are generally hemp exclusive or limited to oilseed processing, they do not handle any raw products which contain gluten so cross-contamination is extremely rare,” he adds. “Where it may happen is in the cleaning or the transportation segments of the supply chain.”

The legalization of cannabis will have an enormous impact on the hemp industry in Canada, advises Crawford. “If new regulations for marijuana impede the growth of hemp production and processing, the industry will continue to grow but at a slower rate than we have been experiencing,” he says.

**Time Will Tell**

Although the future rate of growth for the hemp industry may be impacted by the pending cannabis legalization, the future of gluten-free products seems to be secure. “Fifteen to 20 years ago, you were lucky to find a store selling three different kinds of gluten-free cookies,” states Kaufman. “Now, gluten-free consumers expect the same variety — and the same quality — as any other consumer, and companies are really delivering.”

Manufacturers and processors are stepping up the plate and meeting the increased demand. “Consumers are getting smarter and demanding more quality,” says Kaufman. “We’re seeing manufacturers learning how to ask the important questions to keep their customers and their reputation safe.”

Innovative products, finely tuned processing and a government that continues to lead by example are keeping Canada’s gluten-free market healthy and strong.

“Under Health Canada, gluten is considered the same as declaring any other allergen,” states Valder. “The rest of the world is starting to catch up, including

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**CODEX**, who are revisiting the global allergen challenges, and are requiring more stringent regulations around allergen and gluten-free manufacturing and product claims.

The summation of all the moving parts inherent in producing top-quality, gluten-free foods and beverages is a finely honed market that is not only meeting current consumer demand but is anticipating future demand. Continued research and ongoing regulation will ensure that the consumer is met with innovative foods that will meet their allergen requirements, while still satisfying that all-important need for taste and quality.