

Global Highly Branched Cyclic Dextrin (HBCD) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Highly Branched Cyclic Dextrin (HBCD) market size is expected to reach \$ 33.01 million by 2032, rising at a market growth of 8.2% CAGR during the forecast period (2026-2032).

Global sales of Highly Branched Cyclic Dextrin (HBCD) was about 1867 tons in 2024 with average price of 6757 USD/ton.

Glico Nutrition is the first company to achieve commercial production of Highly Branched Cyclic Dextrin (HBCD) in the world.

The key raw materials are waxy corn starch and branching enzyme.

The average gross margin of the industry ranges from 28%-30%.

Highly Branched Cyclic Dextrin (HBCD), is a new type of dextrin that is produced from amylopectin via cyclization reaction of a branching enzyme (BE, 1,4- α -D-glucan: 1,4- α -D-glucan 6- α -D-(1,4- α -D-glucano)-transferase, EC 2.4.1.18).

Highly Branched Cyclic Dextrin (HBCD), sits in a small but fast-growing niche of the global dextrin market. Technically, HBCD is produced from non-GMO waxy corn starch (amylopectin) via a proprietary enzymatic process involving branching/transglycosylation enzymes that restructure the starch into high-molecular-weight, highly branched cyclic clusters. This architecture gives solutions very low osmolality, high solubility and rapid gastric emptying, so relatively large carbohydrate doses can be delivered with less gastrointestinal distress than glucose or standard maltodextrin ? a key selling point in endurance and high-intensity sports nutrition. Beyond sports supplements, FDA-notified GRAS status for ?cyclic dextrin, highly branched? allows its use as a carbohydrate source, flavouring aid and spray-drying carrier across a wide range of food categories at 0.25?24 g per serving, including beverages, cereals, dairy, snacks and powdered soups.

On the supply side, the industry is unusually concentrated and technology-driven. Ezaki Glico / Glico Nutrition developed Highly Branched Cyclic Dextrin (HBCD) in Japan and

has marketed it as a food ingredient since 2002; the company later secured FDA notified GRAS status (2012) and has built strong IP and scientific data around performance benefits. In parallel, ZymeBase based in China has emerged as a second major technology holder with SusCarb? Dextrin, another patented HBCD positioned as a ?new era sports energy? ingredient and winner of multiple innovation awards in sports-nutrition forums in 2024?2025. Upstream, the cost structure is dominated by waxy corn starch and food-grade enzymes; the FDA?s separate GRAS notice for a 1,4-?-D-glucan branching enzyme from Ezaki Glico explicitly identifies its intended use in producing modified starches including highly branched cyclic dextrans, underscoring the tight coupling between enzyme technology and HBCD manufacturing capacity.

For consumption regions, USA, Japan and China are the key consumers. USA depends on imported Highly Branched Cyclic Dextrin (HBCD) from Japan to meet its own demand. Chinese Highly Branched Cyclic Dextrin (HBCD) output keeps increasing and the country has greatest market potential for the product.

The regulatory and quality landscape is supportive but contributes to entry barriers. For the US, FDA GRAS notifications cover both highly branched cyclic dextrin as a food ingredient and the branching enzyme preparation used to manufacture it, specifying food categories and use levels and confirming safety under intended conditions of use. In addition, major HBCD brands emphasize non-GMO corn sourcing, and frequently obtain regional certifications and innovation awards that reinforce their credibility with brand owners and formulators. At the same time, the need for robust safety dossiers, enzyme-production controls and international food-law compliance has discouraged small commodity starch players from quickly cloning the technology, helping preserve the market?s premium structure.

This report studies the global Highly Branched Cyclic Dextrin (HBCD) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Highly Branched Cyclic Dextrin (HBCD) and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Highly Branched Cyclic Dextrin (HBCD) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Highly Branched Cyclic Dextrin (HBCD) total production and demand, 2021-2032, (Tons)

Global Highly Branched Cyclic Dextrin (HBCD) total production value, 2021-2032, (USD Million)

Global Highly Branched Cyclic Dextrin (HBCD) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Highly Branched Cyclic Dextrin (HBCD) consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Highly Branched Cyclic Dextrin (HBCD) domestic production, consumption, key domestic manufacturers and share

Global Highly Branched Cyclic Dextrin (HBCD) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Highly Branched Cyclic Dextrin (HBCD) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Highly Branched Cyclic Dextrin (HBCD) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Highly Branched Cyclic Dextrin (HBCD) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Glico Nutrition, Zymebase, etc. This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Highly Branched Cyclic Dextrin (HBCD) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Highly Branched Cyclic Dextrin (HBCD) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Highly Branched Cyclic Dextrin (HBCD) Market, Segmentation by Type:

Powder

Other

Global Highly Branched Cyclic Dextrin (HBCD) Market, Segmentation by Application:

Sport Supplements

Cosmetics

Other

Companies Profiled:

Glico Nutrition

Zymebase

Key Questions Answered:

1. How big is the global Highly Branched Cyclic Dextrin (HBCD) market?
2. What is the demand of the global Highly Branched Cyclic Dextrin (HBCD) market?
3. What is the year over year growth of the global Highly Branched Cyclic Dextrin (HBCD) market?
4. What is the production and production value of the global Highly Branched Cyclic Dextrin (HBCD) market?
5. Who are the key producers in the global Highly Branched Cyclic Dextrin (HBCD) market?
6. What are the growth factors driving the market demand?

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