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Global Monoglycerol Stearate Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Monoglycerol Stearate market size is expected to reach $ 2072 million by 2032, rising at a market growth of 4.7% CAGR during the forecast period (2026-2032).

In 2025, the global production of glycerol monostearate is projected to reach 265,500 tons, with an average selling price of US$5,500 per ton.

To address core challenges in the food, daily chemical, and pharmaceutical industries, such as the difficulty of uniformly mixing oils and water, poor product stability, short shelf life, and unsatisfactory taste, glycerol monostearate (GMS) was developed. This product is a non-ionic surfactant produced by the esterification reaction of stearic acid and glycerol. Its core principle lies in its molecular structure, which contains both hydrophilic groups (hydroxyl groups) and lipophilic groups (stearic acid chains). This allows it to form a stable emulsifying film at the oil-water interface, achieving uniform dispersion and stability in oil-water systems. It also possesses multiple functions, including thickening, anti-aging, preservation, and lubrication. Experimental data shows that in the food baking industry, adding an appropriate amount of glycerol monostearate can increase bread volume by more than 30% and extend its shelf life by 2-3 days; in the daily chemical industry, it can significantly improve emulsion stability and prevent stratification and turbidity. Since its industrial production began in the early 20th century, glycerol monostearate, with its high safety, comprehensive functionality, and outstanding cost-effectiveness, has evolved from a single emulsifier into one of the most widely used multifunctional food additives and daily chemical raw materials globally, widely applied in various mainstream fields such as food, daily chemicals, pharmaceuticals, and plastics processing.

In 2025, the global market prices for monoglyceride stearate will vary significantly

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depending on purity, manufacturing process, and application scenarios: Standard monoglyceride stearate (purity ?90%) is suitable for conventional food and low-end daily chemical products, with a unit price of approximately US$2300-3500 per ton; high-purity monoglyceride stearate (purity ?99%, i.e., GMS99) is suitable for high-end food, pharmaceuticals, and high-end daily chemical products, with a unit price reaching US$4500-6800 per ton. In terms of production capacity, the industry exhibits characteristics of 'regional concentration and leading companies' dominance.' The main global production capacity is concentrated in China, the United States, Europe, and Southeast Asia, with China accounting for 48% of the total global capacity. The annual production capacity of a single production line is approximately 7000-8000 tons, the average industry capacity utilization rate is about 89%, and the average product gross profit margin can reach 18.7%, with high-purity products having a gross profit margin of 22%-27%.

Typical Transaction Case:

In the third quarter of 2025, a large comprehensive food group purchased monoglyceride stearate products from Guangdong Jiadele Technology Co., Ltd. The product model was GMS99-food grade, with a total purchase volume of 800 tons and a contract value of approximately US$4.64 million. The technical requirements included: 'Product purity ?99.8%, acid value ?1.2 mg KOH/g, iodine value ?2.0 g I2/100g, melting point 55-60?; suitable for bread and frozen dumpling production, requiring gas retention and dough strengthening effects in bread, and improved dough extensibility and prevention of cracking in frozen dumplings; the product must pass international safety certifications such as FDA, FSSC, HALAL, and KOSHER, and comply with China's GB 1886.65-2016 'National Food Safety Standard - Food Additives - Mono- and Diglycerides of Fatty Acids' and EU EC 1333/2008 standards; no solvent residue, heavy metal content meets the highest food-grade standards, and batch purity fluctuation ?0.1%.' Industry Pain Points

The fundamental pain point of the monoglyceride stearate industry lies in the multiple contradictions arising from its product attributes as a multi-functional additive, and the stringent safety standards, quality upgrade demands, global environmental regulations, and regional competitive landscape of the downstream food, daily chemical, and pharmaceutical industries. The core pain points are specifically manifested as follows:

On the product side, the core technological barriers are concentrated in the high-purity and modified product fields. Key technologies such as the four-stage molecular distillation purification process for high-purity monoglyceride stearate, enzymatic

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synthesis technology, crystal form control technology, and customized functional formulations for modified products have long been dominated by a few overseas companies. Most domestic companies still rely on traditional chemical esterification processes, resulting in gaps in the purity stability and batch consistency of high-purity products (for example, the purity fluctuation of GMS99 products produced by domestic small and medium-sized manufacturers is generally 0.3%-0.5%, which is 2-4 times higher than similar products from companies like Cargill and Danisco); at the same time, some small and medium-sized manufacturers suffer from serious product homogenization, mainly focusing on ordinary products, lacking functional innovation, and frequently experiencing problems such as substandard product purity and excessive solvent residue, which lowers the overall industry reputation and limits the penetration of domestic products in high-end downstream fields. Furthermore, the industry has long faced common pain points such as 'difficulty in achieving purity above 99.2%, high energy consumption of traditional processes, and gaps in safety control,' further restricting industrial upgrading. On the market and regulatory fronts, global food and personal care product safety standards are continuously being upgraded. Standards such as China's GB 2760 (National Food Safety Standard for the Use of Food Additives), the EU's EC 1333/2008, and the US FDA 21 CFR impose increasingly stringent requirements on the purity, solvent residue, heavy metal content, and microbiological indicators of monoglyceride stearate. Domestic small and medium-sized enterprises (SMEs), lacking core technology and financial support, find it difficult to meet the compliance requirements of high-end downstream customers. Compliance upgrades require significant investment and incur high costs. The market exhibits a typical 'two-tiered' structure: the high-end market is dominated by leading companies, while the low-to-medium-end market is plagued by price competition. The domestic market is primarily led by companies in East and South China, where regional SMEs compete by lowering prices to gain market share, further compressing overall industry profit margins. Simultaneously, overseas brands have a first-mover advantage in the high-end market, while domestic companies are at a disadvantage in terms of brand influence and international certification systems. Export products face technical barriers, making it difficult for domestic companies to break through. Industry Chain Structure

The upstream of the monoglyceride stearate industry chain includes core materials (stearic acid mainly sourced from natural oils such as palm oil and coconut oil, with Malaysia, Indonesia, and China being the main suppliers; glycerol is divided into natural and synthetic types, with natural glycerol mostly coming from by-products of oil refining, and China and the United States having sufficient supply; in terms of catalysts, high-end products use enzyme preparations dominated by German and Japanese companies, while ordinary products use chemical catalysts), key components/additives (emulsifiers,

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stabilizers, and antioxidants improve product stability, purification reagents are used for high-purity production, and environmentally friendly treatment reagents are used to handle wastewater and exhaust gas), and technical support (molecular distillation purification, enzymatic synthesis, and crystal form control technologies are jointly developed by universities and enterprises, precision testing technology ensures purity and solvent residue indicators, and intelligent production technology improves efficiency and consistency); downstream applications are concentrated in food (68%, baking accounts for 42% for strengthening and anti-aging, dairy products account for 28% for improving taste, frozen foods account for 18% for preventing freezing cracks, and others account for 12% for beverages and candies), daily chemicals (22%, skincare products account for 52% for emulsification and moisturizing, detergents account for 35% for enhancing detergency, and others account for 13% for personal care and cosmetics), and pharmaceuticals (10%, used for emulsification, solubilization, and excipients in capsules, creams, and injections, maintaining an 8% annual growth rate with pharmaceutical compliance and formulation upgrades). Overall demand is steadily growing with the scale of the food industry, the upgrading of daily chemical quality, and the compliant development of the pharmaceutical industry. Industry Trends and Challenges

The monoglyceride stearate industry is exhibiting four major development trends: high-end development, green development, intelligent development, and domestic substitution. High-end and refined development is driving the market share of high-purity GMS99 and modified products from 25% to 48% by 2032, meeting the needs of niche markets such as plant-based foods and high-end skincare products; green and environmentally friendly development involves replacing traditional processes with enzymatic synthesis and green solvent esterification, while the large-scale application of natural oil raw materials contributes to low-carbon development, giving green-certified companies a market advantage; intelligent and large-scale development relies on the industrial internet to achieve digital and automated production, improving efficiency and stability, and integrated supply chain layouts expand production capacity; accelerated domestic substitution is driven by the maturity of domestic molecular distillation and enzymatic synthesis technologies, increased self-sufficiency in the supply chain, and domestic products approaching international levels in purity and stability, leading to an increase in domestic market penetration from 68% to 85% and enhanced export competitiveness. In terms of market opportunities, the global food additive market will reach US$28 billion in 2025, with monoglyceride stearate accounting for approximately 13.8%, and the domestic market reaching US$9.5 billion, indicating significant room for growth. Emerging fields such as plant-based foods and biopharmaceuticals are driving a high-end demand gap of 80,000 tons annually, and policy support is promoting

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technological transformation and upgrading. Challenges include a 32% dependence on imported high-end core technologies, environmental compliance cost pressures leading to the elimination of small and medium-sized enterprises, homogenized competition in the low-to-medium end compressing profits, overseas brands dominating the high-end market, and increased profitability pressure due to fluctuating raw material prices.

Demand and Business Opportunity Analysis

The demand for monoglyceride stearate is primarily driven by three factors: firstly, the rigid demand for quality upgrades in downstream food, daily chemical, and pharmaceutical industries, where high-end customers have 7-10 times stricter requirements for purity, stability, and safety than conventional customers; high-purity products can reduce baking waste rates by 15%-20% and improve the user experience of high-end daily chemical products by more than 30%; secondly, mandatory environmental and safety policies are driving demand, with tightening global safety standards leading to an 18% annual increase in demand for green and environmentally friendly products, reaching 120,000 tons between 2025 and 2030; thirdly, emerging fields are driving demand, with plant-based foods experiencing a 28% annual increase and high-end skincare products a 22% annual increase, while biodegradable plastics, smart ships, and new energy sources are expanding into new application scenarios. The technological adaptability offers significant advantages: it is compatible with multiple scenarios, meeting 92% of needs, and offers customizable solutions for emulsification and thickening; only 0.1%-0.5% is needed to achieve the desired effect; intelligent production saves 20% on energy and reduces costs by 15%, helping downstream customers reduce procurement costs by 30%-50%; the benefits of domestic substitution are evident, with core breakthroughs by domestic companies increasing the winning bid rate in the high-end market to 42% (an increase of 13 percentage points compared to 2023), achieving a global market share of 28%, and exporting to over 100 countries, while localized raw materials further reduce costs.

This report studies the global Monoglycerol Stearate production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Monoglycerol Stearate 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 Monoglycerol Stearate that contribute to its increasing demand across many markets.

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Highlights and key features of the study

Global Monoglycerol Stearate total production and demand, 2021-2032, (Kilotons)
Global Monoglycerol Stearate total production value, 2021-2032, (USD Million)
Global Monoglycerol Stearate production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)
Global Monoglycerol Stearate consumption by region & country, CAGR, 2021-2032 & (Kilotons)
U.S. VS China: Monoglycerol Stearate domestic production, consumption, key domestic manufacturers and share
Global Monoglycerol Stearate production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)
Global Monoglycerol Stearate production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)
Global Monoglycerol Stearate production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Monoglycerol Stearate 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 Cargill, Yihai Kerry Arawana Holdings, BASF, Evonik Industries, Zhejiang Zanyu Technology, Guangdong Jiadele Technology, Hangzhou Zanyu Oil Technology, Wilmar International, KLK Oleo, IOI Oleochemical, 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 Monoglycerol Stearate market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Kilotons) 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 Monoglycerol Stearate Market, By Region:

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United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Monoglycerol Stearate Market, Segmentation by Type:

Purity ? 90%

Purity Between 40-60%

Purity

Global Monoglycerol Stearate Market, Segmentation by Production Process:

Chemical Esterification

Enzymatic Synthesis

Global Monoglycerol Stearate Market, Segmentation by Form:

Powder

Beads

Paste

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Liquid

Global Monoglycerol Stearate Market, Segmentation by Application:

Food Sector

Cosmetics Sector

Pharmaceutical Sector

Other

Companies Profiled:

Cargill

Yihai Kerry Arawana Holdings

BASF

Evonik Industries

Zhejiang Zanyu Technology

Guangdong Jiadele Technology

Hangzhou Zanyu Oil Technology

Wilmar International

KLK Oleo

IOI Oleochemical

Oleon

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Stepan Company

Croda International

Palsgaard

Danisco

SEPPIC

Key Questions Answered:

1. How big is the global Monoglycerol Stearate market?
2. What is the demand of the global Monoglycerol Stearate market?
3. What is the year over year growth of the global Monoglycerol Stearate market?
4. What is the production and production value of the global Monoglycerol Stearate market?
5. Who are the key producers in the global Monoglycerol Stearate market?
6. What are the growth factors driving the market demand?

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