

Original Black Licorice Market Outlook 2026-2034: Market Share, and Growth Analysis By Type (Twist Candy, Multiple Layer Candy, Granulated Candy, Hollow Tube Candy, Extruded Candy), By Distribution Channel (Supermarkets, Convenient Stores, Specialty Stores, Online, Others)

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Abstracts

The Original Black Licorice Market is valued at USD 1.13 billion in 2025 and is projected to grow at a CAGR of 4.4% to reach USD 1.66 billion by 2034.

Original Black Licorice Market

The Original Black Licorice market comprises confectionery products flavored with true licorice root extract (*glycyrrhiza glabra*) and, in some lines, blended with anise oil or natural anethole for balance. Core applications span everyday snacking; travel/impulse purchases; gifting and seasonal assortments; pharmacy/OTC-style throat-soothing lines; private-label ranges for grocers and discounters; and B2B supply of extract pastes to confectioners, bakery, and spirits producers. Formats include twists, ropes, bites, coins, pastilles, bars, and premium artisan pieces; textures range from soft and chewy to traditional firm. Current trends emphasize clean-label formulations (natural colors, reduced artificial sweeteners), vegan/gelatin-free and palm-oil-free recipes, sugar-reduced or sugar-free options using polyols/fiber, and provenance-led storytelling around root sourcing and heritage. Growth is supported by nostalgia and regional affinity (Nordic, Benelux, DACH), flavor exploration in gourmet retail, e-commerce subscription boxes, and crossovers with salted, chili, or chocolate-coated variants. The competitive landscape features European heritage brands, specialty craft makers, multinational confectioners, and strong private-label programs; upstream, licorice

extract processors and flavor houses shape cost and sensory consistency. Differentiation is shifting from simple “black licorice” positioning to segmented portfolios: classic vs. salty salmiak styles, soft vs. firm bite, natural vs. functional (traditionally soothing), and premium gift packaging. Headwinds include raw-material price volatility, scrutiny of glycyrrhizin levels and blood pressure considerations, evolving sweetener regulations, and polarized consumer taste profiles by geography. Overall, the category is moving from a niche taste to a curated, story-rich proposition balancing authenticity, health-conscious reformulation, and channel diversification.

Original Black Licorice Market Key Insights

Authenticity and root content drive premium trade-up. Brands highlighting real licorice extract, origin narratives, and traditional cooking methods capture connoisseur segments. Clear labeling of extract percentage and flavor sources (licorice vs. anise) builds trust. Blind testing shows consumers distinguish depth of bitterness and herbal notes, rewarding higher root content. Glassine or kraft packaging with heritage cues supports shelf impact. Premium SKUs anchor gifting and specialty margins.

Texture engineering is a repeat-purchase lever. Soft-chew recipes win in mainstream retail, while firm, long-lasting bites appeal to traditionalists. Water activity, gelatin/pectin systems, and starch choices determine chew “snap” and shelf life. Vegan reformulations using pectin or agar widen addressable audiences without sacrificing bite when paired with glycerol/fiber humectants. Controlled aeration enhances flavor release and reduces stickiness in warm climates.

Sugar reduction without flavor loss is maturing. Polyols (e.g., maltitol), chicory fiber, and stevia blends support lower-sugar lines with acceptable mouthfeel. To prevent cooling effects or laxation concerns, brands balance polyol levels and portion cues. Acid/base balance and salt micro-dosing help mask bitterness in high-intensity sweetener systems. Claims are shifting from “sugar-free” to “less sugar” with clear serving guidance.

Salty and spice-led variants broaden the palate. Salmiak (ammonium chloride) styles remain regional heroes, while chili, ginger, and citrus peels add modern twists. Coated dragees and chocolate-dipped pieces lift basket value. Flavor houses craft top notes that keep licorice dominant while smoothing bitterness. Limited editions and collabs with cafés/bakeries maintain news flow and social

engagement.

Health and safety stewardship underpins credibility. Glycyrrhizin management (and consumer education for hypertension, pregnancy, and drug interactions) is essential. Some brands offer deglycyrrhizinated alternatives for sensitive groups. Pharmacy channels value clear advisories and moderate portion sizes. Transparent QA/QC, contaminant testing, and allergen statements reduce retailer risk and improve listings.

Clean label and “free-from” are now table stakes. Natural colors (vegetable carbon, fruit concentrates), non-GMO claims, and palm-oil-free fats align with retailer scorecards. Gelatin-free vegan lines address ethical and cultural preferences. Short ingredient lists and recognizable sweeteners perform well online. Certifications (vegan, kosher, halal) expand export opportunities.

E-commerce and D2C reshape discovery and pack strategy. Multi-pack samplers, resealable pouches, and subscription bundles drive repeat. High review densities and UGC around taste intensity help consumers self-select. Seasonal drops (winter spice, Nordic themes) build urgency. Cold-chain isn't required, but heat stability in transit favors anti-sticking coatings and tighter film barriers.

Private label scales share; brands defend with expertise. Retailers leverage value tiers and clean-label badges to capture price-sensitive shoppers. National and heritage brands counter with nuanced flavor architecture, consistent texture, and storytelling. Co-manufacturing agility - short runs, rapid flavor switches - becomes a competitive advantage. Shopper education at shelf (strength meters, flavor maps) reduces returns.

Upstream extract and supply resilience shape margins. Root supply from Central Asia/Middle East/EU is cyclical; harvest quality affects glycyrrhizin and flavor. Long-term contracts, diversified origins, and in-house extraction stabilize costs. Standardized brix and ash specifications reduce batch variability. Sustainability audits on wildcrafting earn retailer goodwill.

Regulatory and labeling dynamics influence formulation. Country differences in sweetener usage, color approvals, and salmiak limits drive regional SKUs. Front-of-pack nutrition schemes push moderation and portion control cues. Clear differentiation between “original black licorice” and anise-only products avoids

consumer confusion. Proactive compliance reduces relabeling costs and delist risk.

Original Black Licorice Market Regional Analysis

North America

Demand is polarized: strong loyalty among older demographics and niche enthusiasts, with growth via specialty retailers, e-commerce, and Scandinavian-themed imports. Clean-label, vegan, and sugar-reduced claims help recruit new users. Pharmacy and natural channels value clear advisories on glycyrrhizin. Private label performs in club and mass, while craft brands win in gourmet and gift packs. Education at shelf (strength scales) reduces taste mismatch.

Europe

Core heartland with deep cultural roots - Nordics, Benelux, Germany, and the Netherlands drive salmiak and traditional formats. Retailers expect palm-oil-free, natural colors, and vegan options alongside classic gelatin-based lines. Seasonal assortments and travel retail are important volume spikes. Regulatory attention to ammonium chloride levels and sweeteners informs product ranges. Heritage brands and private labels coexist, with strong export flows within the region.

Asia-Pacific

Australia and New Zealand sustain steady demand; Japan and Korea show interest through specialty and novelty channels. Urban China sees licorice-flavored crossovers in bakery and beverages, though taste education is ongoing. Smaller pack sizes, giftable tins, and premium imports appeal in metropolitan areas. Compliance with local additive rules and halal certifications matters in Southeast Asia. Online marketplaces drive trial via sampler bundles.

Middle East & Africa

Familiarity with licorice in beverages and traditional remedies provides an entry narrative. Modern trade growth in the Gulf supports premium imported brands and clean-label positioning. Heat-resistant packaging and anti-sticking measures are essential for logistics. Clear glycyrrhizin guidance is expected in pharmacy channels. Regional

confectioners explore hybrid products using local flavor cues (date, cardamom).

South & Central America

Category awareness is lower but rising through gourmet shops, travel retail, and e-commerce. Price sensitivity favors private label and compact packs. Regulatory frameworks around sweeteners and colorants require tailored formulations. Messaging focuses on “classic European taste” and novelty to prompt trial. Distributor partnerships with specialty retailers and caf?s improve visibility and rotation.

Original Black Licorice Market Segmentation

By Type

Twist Candy

Multiple Layer Candy

Granulated Candy

Hollow Tube Candy

Extruded Candy

By Distribution Channel

Supermarkets

Convenient Stores

Specialty Stores

Online

Others

Key Market players

Haribo, Katjes, Cloetta, Mondelez International (Bassett's), American Licorice Company (Red Vines), Panda (Orkla's Panda Natural), Orkla Confectionery & Snacks (Nidar), Toms Group (Pingvin), Lakrids by B?low, Darrell Lea, RJ's Licorice, Halva Oy, Fazer, Valeo Confectionery (Barratt/Lion), Gerrit J. Verburg Co. (Gerrit's), Kenny's Candy & Confections (Wiley Wallaby), Cavendish & Harvey, Bubs Godis AB, Perfetti Van Melle (Klene), Meenk (Van Vliet Candy Company)

Original Black Licorice Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modelling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends. Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behaviour are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

Original Black Licorice Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption. Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

Countries Covered

North America — Original Black Licorice market data and outlook to 2034

United States

Canada

Mexico

Europe — Original Black Licorice market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — Original Black Licorice market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — Original Black Licorice market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — Original Black Licorice market data and outlook to 2034

Brazil

Argentina

Chile

Peru

* We can include data and analysis of additional countries on demand.

Research Methodology

This study combines primary inputs from industry experts across the Original Black Licorice value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

Key Questions Addressed

What is the current and forecast market size of the Original Black Licorice industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth

potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

Your Key Takeaways from the Original Black Licorice Market Report

Global Original Black Licorice market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Original Black Licorice trade, costs, and supply chains

Original Black Licorice market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Original Black Licorice market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term Original Black Licorice market trends, drivers, restraints, and opportunities

Porter’s Five Forces analysis, technological developments, and Original Black Licorice supply chain analysis

Original Black Licorice trade analysis, Original Black Licorice market price

analysis, and Original Black Licorice supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest Original Black Licorice market news and developments

Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

* The updated report will be delivered within 3 working days

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