

# **Carboxymethyl Cellulose (CMC) Market Forecasts to 2032 – Global Analysis By Property Type (Thickening Agent, Stabilizer, Binder, Lubricant, and Film Forming Agent), Purity Level, Application and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Carboxymethyl Cellulose (CMC) Market is accounted for \$1.74 billion in 2025 and is expected to reach \$2.67 billion by 2032 growing at a CAGR of 6.3% during the forecast period. Carboxymethyl cellulose (CMC) is a cellulose-based, water-soluble compound commonly employed as a stabilizer, thickener, and binder across multiple industries. It improves product texture, viscosity, and longevity, proving useful in food, pharmaceuticals, cosmetics, and paper production. With strong water absorption and gel-forming properties, CMC enhances formulation consistency and performance. Its non-toxic, biodegradable nature makes it a versatile ingredient suitable for a wide range of commercial applications.

According to the U.S. Census Bureau, retail food and beverage store sales in the United States reached around USD 947 billion in 2022, marking a 7.6% increase from 2021.

### **Market Dynamics:**

Driver:

Rising demand for processed and convenient food

The growing preference for ready-to-eat and easy-to-prepare meals is significantly boosting the use of CMC in food applications. As consumers seek healthier and more convenient options, CMC helps enhance texture and stability in low-fat and gluten-free products. Technological progress in food science is enabling better formulations with

improved shelf life and mouthfeel. CMC's resilience to heat and salt makes it suitable for a wide range of processed foods and beverages. Innovations such as smart packaging and edible films are expanding its role beyond traditional uses. With evolving consumer habits, CMC continues to be a key ingredient in modern food production.

#### Restraint:

##### Availability of substitutes in various applications

CMC faces increasing competition from alternative thickeners like guar gum, xanthan gum, and modified starches. These substitutes often offer similar functionality at lower costs, making them attractive to manufacturers. Advances in natural and plant-based ingredients are further challenging CMC's market position. Regulatory trends favoring clean-label and minimally processed additives are shifting demand toward alternatives. Smaller producers find it difficult to compete on price and innovation against these emerging options. As the market diversifies, CMC must evolve to maintain its relevance and competitiveness.

#### Opportunity:

##### Demand for abuse-deterrent pharmaceutical formulations

The pharmaceutical industry is turning to CMC for its role in creating tamper-resistant drug delivery systems. Its binding and disintegration properties support controlled-release formulations, improving patient safety and compliance. Innovations combining CMC with nanotechnology are enhancing drug stability and targeted delivery. Regulatory support for abuse-deterrent medications is driving demand for excipients like CMC. Developing markets are also adopting these formulations to address rising health concerns. As pharmaceutical technologies advance, CMC is becoming integral to safer and more effective drug products.

#### Threat:

##### Strong bargaining power of buyers

Large buyers in food, pharma, and industrial sectors are exerting pressure on CMC suppliers to lower prices and improve quality. Centralized procurement and stringent sourcing standards are challenging smaller manufacturers. Buyers increasingly demand traceable, certified ingredients, pushing suppliers to invest in compliance and

transparency. These expectations raise production costs and reduce profit margins for less-established firms. Competitive pricing and high-volume contracts limit negotiation flexibility for CMC producers. To stay competitive, companies must innovate and build strategic alliances with key buyers.

### **Covid-19 Impact:**

The pandemic disrupted global supply chains, affecting raw material availability and delaying CMC production. Demand from foodservice and industrial sectors declined temporarily due to lockdowns and reduced operations. However, increased focus on hygiene and pharmaceuticals revived interest in high-purity CMC grades. Regulatory bodies accelerated approvals for essential excipients, helping stabilize the market. Manufacturers adopted automation and decentralized production to enhance resilience. Post-COVID strategies now emphasize sustainability, digitalization, and supply chain robustness across the CMC industry.

The thickening agent segment is expected to be the largest during the forecast period

The thickening agent segment is expected to account for the largest market share during the forecast period, due to its widespread use in food, cosmetics, and industrial products. CMC's ability to maintain viscosity under diverse conditions makes it ideal for processed foods and beverages. In cosmetics, it stabilizes emulsions and enhances product texture. Industrial applications like paper and paint benefit from its rheology control properties. Technological improvements are driving demand for multifunctional and eco-friendly thickening agents. As industries seek performance and sustainability, this segment remains dominant.

The Pharmaceuticals segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Pharmaceuticals segment is predicted to witness the highest growth rate, due to its role in advanced drug formulations. It supports controlled-release mechanisms and improves tablet integrity and patient compliance. Innovations in excipient technology are expanding its use in both generic and specialty drugs. Regulatory encouragement for tamper-resistant and biodegradable coatings is boosting adoption. Emerging markets are increasing investments in healthcare infrastructure, driving demand for CMC-based products. With rising standards in drug safety and delivery, the pharmaceutical segment is set for strong growth.

### **Region with largest share:**

During the forecast period, the Asia Pacific region is expected to hold the largest market share, driven by rapid industrial growth and expanding consumer demand. Countries like China, India, and Japan are investing in food processing, pharmaceuticals, and oil exploration all key sectors for CMC. Government policies promoting domestic manufacturing and import reduction are supporting market expansion. Rising middle-class populations are fueling demand for processed foods and personal care products. Strategic collaborations between global and regional players are enhancing technology access and distribution. With favorable economics and growing applications, Asia Pacific leads the global CMC market.

### **Region with highest CAGR:**

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to its innovation-driven industries. The region leads in pharmaceutical R&D, clean-label food trends, and advanced drilling technologies. Regulatory agencies are streamlining approvals for high-purity and sustainable excipients. Retailers and manufacturers are prioritizing traceable and certified ingredients, boosting demand for premium CMC grades. Emerging applications in energy storage and smart materials are opening new growth avenues. With strong infrastructure and innovation, North America is shaping the future of CMC development.

### **Key players in the market**

Some of the key players in Carboxymethyl Cellulose (CMC) Market include CP Kelco, Stepan Company, Ashland Global Holdings Inc., Tate & Lyle, The Dow Chemical Company, Qingdao Sinocmc Chemical Co., Ltd., Nouryon, Patel Industries, Nippon Paper Industries Co., Ltd., Qu?mica Amtex, Daicel Corporation, Lotte Fine Chemical Co., Ltd., DKS Co., Ltd., J. Rettenmaier & S?hne (JRS), and Lamberti S.p.A.

### **Key Developments:**

In September 2025, Tate & Lyle PLC announced a new strategic partnership with MassChallenge UK and MassChallenge Switzerland, global hubs in the renowned early-stage start-up accelerator, to help foster innovation ecosystems driving the future of food. Tate & Lyle joins as a foundational corporate partner in the UK programme which works with start-ups and early-stage companies to build capabilities, develop networks and compete for funding accelerating the scale-up of transformative technologies.

In May 2025, Stepan Company announced that its subsidiary, Stepan Philippines Quaternaries, Inc. (SPQI), has entered into an agreement to sell SPQI's manufacturing assets located in Bauan, Batangas, Philippines to Masurf, Inc., a subsidiary of Musim Mas Holdings Pte. Ltd. As part of the transaction, SPQI will enter into a tolling agreement with Masurf to continue to serve customers after the closing. The transaction is subject to normal closing conditions. Terms of the transaction were not disclosed.

#### Property Types Covered:

Thickening Agent

Stabilizer

Binder

Lubricant

Film Forming Agent

#### Purity Levels Covered:

Highly Purified CMC

Industrial Grade CMC

Technical Grade CMC

#### Applications Covered:

Food & Beverage

Pharmaceuticals

Cosmetics & Personal Care

Oil & Gas

Detergents

Paper Processing

Other Applications

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

**What our report offers:**

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market

estimations

- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

### **Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

#### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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