

# Isomalt Market Forecasts to 2030 – Global Analysis By Type (Liquid Isomalt, Powdered Isomalt and Crystalline Isomalt), Form, Application and By Geography

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## Abstracts

According to Statistics MRC, the Global Isomalt Market is accounted for \$1100.06 million in 2024 and is expected to reach \$1641.65 million by 2030 growing at a CAGR of 6.9% during the forecast period. Beets are the source of isomalt, a sugar replacement that is typically utilised in low-calorie and sugar-free food items. It is a sugar alcohol that is appropriate for diabetics since it has a low glycaemic index and roughly half the calories of ordinary sugar. Since of its exceptional stability, isomalt is perfect for baking, cooking, and candy-making since it keeps its smooth texture and doesn't crystallise.

Market Dynamics:

Driver:

Growing demand for sugar substitutes

Health-conscious people like isomalt, a sugar alcohol made from beetroot sugar, since it provides a low-calorie, low-glycemic index alternative. The trend for sugar-free or reduced-sugar goods is being further fuelled by the growth in diabetes and obesity incidence worldwide. To satisfy this desire, food and beverage producers are adding isomalt to baked products, chocolates, and sweets. Additionally, because it is a component of several medications and lozenges, isomalt is becoming more and more popular in the pharmaceutical sector. Moreover, contributing to Isomalt's market expansion is the growing customer desire for natural and clean-label components.

### Restraint:

#### Limited awareness in some regions

Isomalt's advantages, such its low glycaemic index and compatibility with sugar-free goods, are not well known to many potential customers. Manufacturers in these areas are less likely to use isomalt in their products if they are not properly educated. The demand from health-conscious customers looking for sugar substitutes is also impacted by the lack of knowledge. Furthermore, marketing initiatives are sometimes insufficient, which makes breaking into unexplored areas more difficult.

### Opportunity:

#### Use in pharmaceuticals and personal care

In pharmaceuticals, it serves as filler in tablets and capsules, offering stability and improved taste without affecting blood sugar levels. Demand in the cosmetics sector has been driven by its capacity to improve the texture and shelf life of personal care products, such as lotions and creams. Isomalt is a common component in personal care products because of its safe and efficient moisture-retention qualities. It is also used in sugar-free goods because of its low glycaemic index, which attracts to consumers who are health-conscious.

### Threat:

#### Consumer preference for natural alternatives

The industry for artificial replacements is facing difficulties as more consumers look for plant-based and organic alternatives. People believe that natural sweeteners like honey and stevia are healthier and better for the environment. Isomalt has found it more difficult to hold onto its market share as a result of this change in customer behaviour. Additionally, the drive towards natural solutions has been fuelled by growing knowledge of the possible negative consequences of synthetic substances.

### Covid-19 Impact

The COVID-19 pandemic significantly impacted the Isomalt market, as demand for sugar alternatives surged due to heightened health awareness. With consumers seeking healthier food options, especially during lockdowns, the market for Isomalt,

used in sugar-free candies and other low-calorie products, expanded. However, disruptions in supply chains and production challenges led to temporary delays in manufacturing and distribution. Despite this, the market rebounded as consumer preferences shifted toward healthier, functional ingredients. The trend toward sugar substitutes is expected to continue post-pandemic, fuelling market growth.

The powdered isomalt segment is expected to be the largest during the forecast period

The powdered isomalt segment is expected to account for the largest market share during the forecast period, due to its versatility and ease of use in various applications. It is favored in the confectionery industry for its ability to produce sugar-free and low-calorie products. The powder form offers better solubility and consistency, making it easier to integrate into recipes. Additionally, powdered isomalt's stability and long shelf life appeal to manufacturers looking for efficient production processes. As demand for healthier and sugar-alternative ingredients increases, powdered isomalt is poised to play a significant role in expanding the market.

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 increasing use as a sugar substitute in medications. Isomalt is preferred in the pharmaceutical industry for its low glycemic index, making it suitable for diabetic patients. It is also used in the production of sugar-free lozenges, cough drops, and other oral care products. The rise in health-conscious consumers and the growing demand for natural sweeteners in medications further fuel its adoption. This trend is expected to continue as more pharmaceutical companies prioritize healthier, sugar-free alternatives in their formulations.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share due to increasing consumer demand for sugar substitutes and healthier dietary options. Isomalt, a sugar substitute derived from sugar beets, offers a low glycemic index, making it suitable for individuals managing diabetes and obesity. Its non-hygroscopic nature ensures products remain non-sticky and resistant to moisture, enhancing its appeal in confectionery and bakery applications. Key players in the region include BENEÓ GmbH, Cargill, Inc., and Merck KGaA, among others. This growth is further supported by the rising popularity of sugar-free products and the increasing

adoption of healthy diet regimes among consumers.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR driven by increasing health consciousness and a rising demand for sugar-free and low-calorie products. Countries like China and India are at the forefront, with consumers seeking healthier alternatives to traditional sugar. The expanding food and beverage industry in this region further propels market growth, as isomalt is utilized in confectionery, bakery products, and beverages. Additionally, favourable government policies supporting the use of sugar substitutes contribute to the market's expansion.

Key players in the market

Some of the key players profiled in the Isomalt Market include BASF SE, Tate & Lyle PLC, Cargill, Inc., Sudzucker AG, Matsutani Chemical Industry Co., Ltd., Roquette Freres S.A., Ingredion Incorporated, Johnson & Johnson, Shandong Sanyuan Biotechnology Co., Ltd., FMC Corporation, Lonza Group, Beneo GmbH, Tereos S.A., Luye Pharma Group and Gulshan Polyols Ltd.

Key Developments:

In January 2025, BASF Coatings entered a strategic partnership with BMW Group, making its Glasurit and R-M brands preferred paint brands for BMW's aftersales network. While primarily focused on automotive coatings, this partnership illustrates BASF's commitment to sustainability and innovation, principles that also apply to its efforts in the Isomalt market.

In June 2024, BASF SE established a long-term supply agreement with Encina Development Group, LLC for chemically recycled circular benzene derived from post-consumer plastics. This partnership aims to enhance BASF's circular economy initiatives by integrating more recycled raw materials into its production processes, which includes applications relevant to the Isomalt market through its Ccycled® product portfolio.

Types Covered:

Liquid Isomalt

Powdered Isomalt

Crystalline Isomalt

Forms Covered:

Syrup

Powder

Crystals

Applications Covered:

Food & Beverages

Pharmaceuticals

Cosmetics

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 2022, 2023, 2024, 2026, and 2030
- 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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