

# **Novel Sweeteners Market Forecasts to 2032 – Global Analysis By Product Type (Stevia, Monk Fruit Extract, Allulose, Tagatose, Rare Sugars, Brazzein, Thaumatin, Sorbitol, Erythritol, Xylitol and Other Product Types), Source, Form, Distribution Channel, Functionality, Application and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Novel Sweeteners Market is accounted for \$3.7 billion in 2025 and is expected to reach \$6.7 billion by 2032 growing at a CAGR of 8.5% during the forecast period. Novel sweeteners are innovative sugar alternatives developed through advanced biotechnological or synthetic processes. Unlike traditional sweeteners, they often offer enhanced sweetness intensity, minimal caloric impact, and improved metabolic profiles. These compounds such as steviol glycosides, monk fruit extracts, or allulose are increasingly used in food and beverage formulations to meet consumer demand for healthier, low-sugar options. Regulatory approval and safety assessments vary by region, but novel sweeteners are gaining traction for their functional versatility and potential health benefits in modern nutrition.

According Public Health Nutrition, the global volume of non-nutritive sweeteners (NNS) sold in packaged foods and beverages increased by over 36% between 2007 and 2022, with steviol glycosides and sucralose leading the growth across multiple regions.

### **Market Dynamics:**

Driver:

Rising demand for low-calorie and diabetic-friendly products

As diabetes and obesity rates climb, consumers are actively seeking alternatives that support glycemic control and weight management. Novel sweeteners such as stevia, monk fruit, and allulose are gaining traction due to their natural origins and minimal impact on blood sugar levels. Food and beverage manufacturers are reformulating products to cater to health-conscious consumers, integrating these sweeteners into snacks, beverages, and bakery items. Additionally, regulatory approvals and clean-label trends are accelerating adoption across mainstream and specialty markets.

#### Restraint:

##### Limited consumer awareness in emerging markets

Consumers in these markets often rely on conventional sugar or artificial sweeteners due to familiarity and affordability. Educational gaps regarding the benefits and safety of plant-based or fermented sweeteners hinder market penetration. Moreover, limited availability in retail channels and lack of promotional campaigns restrict visibility. Manufacturers face challenges in building trust and communicating the functional advantages of novel sweeteners, especially in rural and semi-urban areas where dietary habits are deeply rooted.

#### Opportunity:

##### Growth in e-commerce and health-focused retail channels

Digital marketplaces allow consumers to explore niche products, compare ingredients, and access detailed nutritional information. Brands are leveraging e-commerce to launch targeted marketing campaigns, offer subscription models, and educate buyers through interactive content. This shift is particularly beneficial for small and mid-sized manufacturers seeking direct-to-consumer engagement without relying on traditional retail infrastructure.

#### Threat:

##### Competition from traditional and artificial sweeteners

Products like sucralose, aspartame, and saccharin continue to dominate due to their low cost, established supply chains, and widespread consumer recognition. Additionally, sugar remains a staple in many cultures, making behavioral shifts challenging. Some

consumers perceive novel sweeteners as less palatable or unfamiliar, which can slow adoption. Price sensitivity and limited scalability further constrain market growth, especially in regions where cost-effective sweetening solutions are prioritized over health benefits.

### Covid-19 Impact

The pandemic reshaped consumer priorities amplifying interest in immunity-boosting and health-conscious products including novel sweeteners. Lockdowns and supply chain disruptions initially affected production and distribution, but demand rebounded as consumers sought alternatives to sugar for home cooking and packaged foods. Increased focus on metabolic health and preventive nutrition drove purchases of diabetic-friendly sweeteners. Moreover, the rise of digital health awareness and remote wellness consultations encouraged dietary changes, supporting market expansion.

The monk fruit extract segment is expected to be the largest during the forecast period

The monk fruit extract segment is estimated to have a lucrative growth, due to its zero-calorie profile and natural origin. Its high-intensity sweetness, derived from mogrosides, makes it suitable for a wide range of applications including beverages, dairy, and confectionery. The extract's antioxidant properties and favorable regulatory status in key markets such as the U.S. and China further enhance its appeal. Manufacturers are investing in scalable cultivation and extraction technologies to meet rising demand.

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

The microbial fermentation segment is anticipated to witness the fastest CAGR growth during the forecast period, driven by innovations in biotechnology and precision fermentation. This method enables the production of rare sugars like allulose and tagatose with minimal environmental impact and high purity. Fermentation-based sweeteners offer consistent taste profiles and are increasingly used in functional foods and beverages. Startups and established players alike are exploring fermentation to overcome supply limitations associated with plant-derived sweeteners.

Region with highest share:

Asia Pacific is projected to hold the highest market share during the forecast period owing to strong agricultural capabilities, rising health awareness, and favorable

government initiatives. Countries like China, Japan, and South Korea are investing in natural ingredient innovation and promoting sugar reduction policies. Urbanization and changing dietary preferences are driving demand for low-calorie products, especially among younger demographics.

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

North America is projected to have the highest CAGR over the forecast period, fueled by advanced food processing technologies and a proactive regulatory environment. The region's consumers are increasingly adopting clean-label and keto-friendly products, creating fertile ground for novel sweeteners. Major food brands are reformulating offerings to reduce added sugars, while startups are introducing innovative formats such as sweetener blends and functional syrups. The U.S. FDA's recognition of several novel sweeteners as GRAS (Generally Recognized As Safe) is accelerating market entry.

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

Some of the key players profiled in the Novel Sweeteners Market include Cargill Inc., Tate & Lyle PLC, Ingredion Incorporated, ADM (Archer Daniels Midland Company), Roquette Frères, GLG Life Tech Corporation, PureCircle, SweeGen Inc., Evolva Holding SA, Stevia First Corp, Matsutani Chemical Industry Co., Ltd., NutraSweet Natural, Xlear Inc., Zevia LLC, Whole Earth Brands, Biosweet Ventures, Health Garden USA, NOW Foods, Morita Kagaku Kogyo Co., Ltd., and Blue California.

### **Key Developments:**

In September 2025, Ingredion signed a conditional agreement to sell 51% of Rafhan Maize to Nishat Hotels. Ingredion will retain 20% ownership, pending international financing. The deal is expected to close in H1 2026.

In September 2025, Roquette completed its acquisition of IFF Pharma Solutions. H1 turnover grew 4% to €2.37B, with EBITDA up 18%. The company reorganized into two business groups for strategic focus.

In March 2025, NOW Foods launched Omega-3 Gummy Chews and Gaming Performance supplements. It expanded ISO 17025 testing and partnered with Brooks Beasts Track Club. The brand continues leading in clean-label innovation.

## Product Types Covered:

Stevia

Monk Fruit Extract

Allulose

Tagatose

Rare Sugars

Brazzein

Thaumatococcus

Sorbitol

Erythritol

Xylitol

Other Product Types

## Sources Covered:

Plant-Based

Microbial Fermentation

Synthetic

Enzymatically Converted Sugars

Other Sources

## Forms Covered:

Powder

Liquid

Granules

Other Forms

#### Distribution Channels Covered:

Direct Sales (B2B)

Retail Sales (B2C)

Other Distribution Channels

#### Functionalities Covered:

Zero-Calorie Sweeteners

Low-Calorie Bulk Replacers

Functional/Clean-Label

Baking/Stability Specific Grades

Other Functionalities

#### Applications Covered:

Food & Beverages

Pharmaceuticals

Nutraceuticals

Personal Care

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

## Contents

### **1 EXECUTIVE SUMMARY**

### **2 PREFACE**

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
  - 2.4.1 Data Mining
  - 2.4.2 Data Analysis
  - 2.4.3 Data Validation
  - 2.4.4 Research Approach
- 2.5 Research Sources
  - 2.5.1 Primary Research Sources
  - 2.5.2 Secondary Research Sources
  - 2.5.3 Assumptions

### **3 MARKET TREND ANALYSIS**

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Product Analysis
- 3.7 Application Analysis
- 3.8 Emerging Markets
- 3.9 Impact of Covid-19

### **4 PORTERS FIVE FORCE ANALYSIS**

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

## **5 GLOBAL NOVEL SWEETENERS MARKET, BY PRODUCT**

- 5.1 Introduction
- 5.2 Stevia
- 5.3 Monk Fruit Extract
- 5.4 Allulose
- 5.5 Tagatose
- 5.6 Rare Sugars
- 5.7 Brazzein
- 5.8 Thaumatin
- 5.9 Sorbitol
- 5.10 Erythritol
- 5.12 Xylitol
- 5.13 Other Product Types

## **6 GLOBAL NOVEL SWEETENERS MARKET, BY SOURCE**

- 6.1 Introduction
- 6.2 Plant-Based
- 6.3 Microbial Fermentation
- 6.4 Synthetic
- 6.5 Enzymatically Converted Sugars
- 6.6 Other Sources

## **7 GLOBAL NOVEL SWEETENERS MARKET, BY FORM**

- 7.1 Introduction
- 7.2 Powder
- 7.3 Liquid
- 7.4 Granules
- 7.5 Other Forms

## **8 GLOBAL NOVEL SWEETENERS MARKET, BY DISTRIBUTION CHANNEL**

- 8.1 Introduction
- 8.2 Direct Sales (B2B)
- 8.3 Retail Sales (B2C)
  - 8.3.1 Supermarkets/Hypermarkets
  - 8.3.2 Online Retail

- 8.3.3 Specialty Stores
- 8.4 Other Distribution Channels

## **9 GLOBAL NOVEL SWEETENERS MARKET, BY FUNCTIONALITY**

- 9.1 Introduction
- 9.2 Zero-Calorie Sweeteners
- 9.3 Low-Calorie Bulk Replacers
- 9.4 Functional/Clean-Label
- 9.5 Baking/Stability Specific Grades
- 9.6 Other Functionalities

## **10 GLOBAL NOVEL SWEETENERS MARKET, BY APPLICATION**

- 10.1 Introduction
- 10.2 Food & Beverages
- 10.3 Pharmaceuticals
- 10.4 Nutraceuticals
- 10.5 Personal Care
- 10.6 Other Applications

## **11 GLOBAL NOVEL SWEETENERS MARKET, BY GEOGRAPHY**

- 11.1 Introduction
- 11.2 North America
  - 11.2.1 US
  - 11.2.2 Canada
  - 11.2.3 Mexico
- 11.3 Europe
  - 11.3.1 Germany
  - 11.3.2 UK
  - 11.3.3 Italy
  - 11.3.4 France
  - 11.3.5 Spain
  - 11.3.6 Rest of Europe
- 11.4 Asia Pacific
  - 11.4.1 Japan
  - 11.4.2 China
  - 11.4.3 India

- 11.4.4 Australia
- 11.4.5 New Zealand
- 11.4.6 South Korea
- 11.4.7 Rest of Asia Pacific
- 11.5 South America
  - 11.5.1 Argentina
  - 11.5.2 Brazil
  - 11.5.3 Chile
  - 11.5.4 Rest of South America
- 11.6 Middle East & Africa
  - 11.6.1 Saudi Arabia
  - 11.6.2 UAE
  - 11.6.3 Qatar
  - 11.6.4 South Africa
  - 11.6.5 Rest of Middle East & Africa

## **12 KEY DEVELOPMENTS**

- 12.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 12.2 Acquisitions & Mergers
- 12.3 New Product Launch
- 12.4 Expansions
- 12.5 Other Key Strategies

## **13 COMPANY PROFILING**

- 13.1 Cargill Inc. .
- 13.2 Tate & Lyle PLC
- 13.3 Ingredion Incorporated
- 13.4 ADM (Archer Daniels Midland Company)
- 13.5 Roquette Freres
- 13.6 GLG Life Tech Corporation
- 13.7 PureCircle
- 13.8 SweeGen Inc. .
- 13.9 Evolva Holding SA
- 13.10 Stevia First Corp
- 13.11 Matsutani Chemical Industry Co., Ltd.
- 13.12 NutraSweet Natural
- 13.13 Xlear Inc. .

- 13.14 Zevia LLC
- 13.15 Whole Earth Brands
- 13.16 Biosweet Ventures
- 13.17 Health Garden USA
- 13.18 NOW Foods
- 13.19 Morita Kagaku Kogyo Co., Ltd.
- 13.20 Blue California

## List Of Tables

### LIST OF TABLES

- Table 1 Global Novel Sweeteners Market Outlook, By Region (2024-2032) (\$MN)
- Table 2 Global Novel Sweeteners Market Outlook, By Product Type (2024-2032) (\$MN)
- Table 3 Global Novel Sweeteners Market Outlook, By Stevia (2024-2032) (\$MN)
- Table 4 Global Novel Sweeteners Market Outlook, By Monk Fruit Extract (2024-2032) (\$MN)
- Table 5 Global Novel Sweeteners Market Outlook, By Allulose (2024-2032) (\$MN)
- Table 6 Global Novel Sweeteners Market Outlook, By Tagatose (2024-2032) (\$MN)
- Table 7 Global Novel Sweeteners Market Outlook, By Rare Sugars (2024-2032) (\$MN)
- Table 8 Global Novel Sweeteners Market Outlook, By Brazzein (2024-2032) (\$MN)
- Table 9 Global Novel Sweeteners Market Outlook, By Thaumatin (2024-2032) (\$MN)
- Table 10 Global Novel Sweeteners Market Outlook, By Sorbitol (2024-2032) (\$MN)
- Table 11 Global Novel Sweeteners Market Outlook, By Erythritol (2024-2032) (\$MN)
- Table 12 Global Novel Sweeteners Market Outlook, By Xylitol (2024-2032) (\$MN)
- Table 13 Global Novel Sweeteners Market Outlook, By Other Product Types (2024-2032) (\$MN)
- Table 14 Global Novel Sweeteners Market Outlook, By Source (2024-2032) (\$MN)
- Table 15 Global Novel Sweeteners Market Outlook, By Plant-Based (2024-2032) (\$MN)
- Table 16 Global Novel Sweeteners Market Outlook, By Microbial Fermentation (2024-2032) (\$MN)
- Table 17 Global Novel Sweeteners Market Outlook, By Synthetic (2024-2032) (\$MN)
- Table 18 Global Novel Sweeteners Market Outlook, By Enzymatically Converted Sugars (2024-2032) (\$MN)
- Table 19 Global Novel Sweeteners Market Outlook, By Other Sources (2024-2032) (\$MN)
- Table 20 Global Novel Sweeteners Market Outlook, By Form (2024-2032) (\$MN)
- Table 21 Global Novel Sweeteners Market Outlook, By Powder (2024-2032) (\$MN)
- Table 22 Global Novel Sweeteners Market Outlook, By Liquid (2024-2032) (\$MN)
- Table 23 Global Novel Sweeteners Market Outlook, By Granules (2024-2032) (\$MN)
- Table 24 Global Novel Sweeteners Market Outlook, By Other Forms (2024-2032) (\$MN)
- Table 25 Global Novel Sweeteners Market Outlook, By Distribution Channel (2024-2032) (\$MN)
- Table 26 Global Novel Sweeteners Market Outlook, By Direct Sales (B2B) (2024-2032) (\$MN)
- Table 27 Global Novel Sweeteners Market Outlook, By Retail Sales (B2C) (2024-2032) (\$MN)
- Table 28 Global Novel Sweeteners Market Outlook, By Supermarkets/Hypermarkets

(2024-2032) (\$MN)

Table 29 Global Novel Sweeteners Market Outlook, By Online Retail (2024-2032) (\$MN)

Table 30 Global Novel Sweeteners Market Outlook, By Specialty Stores (2024-2032) (\$MN)

Table 31 Global Novel Sweeteners Market Outlook, By Other Distribution Channels (2024-2032) (\$MN) 32 Global Novel Sweeteners Market Outlook, By Functionality (2024-2032) (\$MN)

Table 33 Global Novel Sweeteners Market Outlook, By Zero-Calorie Sweeteners (2024-2032) (\$MN)

Table 34 Global Novel Sweeteners Market Outlook, By Low-Calorie Bulk Replacers (2024-2032) (\$MN)

Table 35 Global Novel Sweeteners Market Outlook, By Functional/Clean-Label (2024-2032) (\$MN)

Table 36 Global Novel Sweeteners Market Outlook, By Baking/Stability Specific Grades (2024-2032) (\$MN) 37 Global Novel Sweeteners Market Outlook, By Other Functionalities (2024-2032) (\$MN)

Table 38 Global Novel Sweeteners Market Outlook, By Application (2024-2032) (\$MN)

Table 39 Global Novel Sweeteners Market Outlook, By Food & Beverages (2024-2032) (\$MN)

Table 40 Global Novel Sweeteners Market Outlook, By Pharmaceuticals (2024-2032) (\$MN)

Table 41 Global Novel Sweeteners Market Outlook, By Nutraceuticals (2024-2032) (\$MN)

Table 42 Global Novel Sweeteners Market Outlook, By Personal Care (2024-2032) (\$MN)

Table 43 Global Novel Sweeteners Market Outlook, By Other Applications (2024-2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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