

Fermented Ingredients Market - Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Type (Amino Acids, Organic Acids, Industrial Enzymes and Others), By Form (Dry and Liquid), By Process (Batch Fermentation, Continuous Fermentation, Aerobic Fermentation and Anaerobic Fermentation), By Application (Food & Beverages, Feed, Pharmaceuticals and Others), By Region & Competition, 2021-2031F

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Abstracts

The Global Fermented Ingredients Market is projected to grow from USD 47.08 Billion in 2025 to USD 73.92 Billion by 2031, registering a CAGR of 7.81%. Fermented ingredients, which consist of metabolic byproducts or biomass produced through controlled microbial activity, are utilized to improve flavor, nutritional value, and shelf-stability across various applications. This market expansion is primarily driven by a structural shift toward natural, clean-label preservation methods and the rising industrial demand for sustainable protein alternatives. These drivers are not merely transient trends but are rooted in a need for long-term supply chain sustainability and consumer rejection of synthetic additives, necessitating permanent adjustments in food manufacturing formulations.

However, the sector faces a significant challenge regarding the high capital expenditure required to scale fermentation infrastructure and the difficulty of navigating fragmented global regulatory frameworks for novel ingredients. These hurdles can extend development timelines and impede the commercial viability of emerging technologies such as precision fermentation. Despite these operational barriers, the investment

landscape is broadening; according to the Good Food Institute, the number of unique investors actively funding the fermentation sector increased by 22% in 2023.

Market Driver

The surge in consumer demand for probiotics and digestive health solutions is fundamentally reshaping the fermented ingredients market, elevating these components from simple preservatives to essential functional agents. This shift is driven by a deepening consumer understanding of the microbiome's role in systemic wellness, leading to the integration of fermented solutions into complex medical and dietary regimens. Highlighting this trend, a June 2025 consumer perception study by Kerry Group found that 69% of participants attributed their continued use of GLP-1 medications to the digestive health benefits provided by concurrent probiotic supplementation, indicating that fermented ingredients are becoming critical adjuncts to modern pharmaceutical therapies and expanding their commercial application beyond traditional food products.

Simultaneously, the rapid expansion of precision fermentation for alternative proteins is catalyzing significant industrial investment despite high entry barriers. This technology enables the production of bio-identical proteins without animal agriculture, effectively addressing sustainability mandates while necessitating substantial infrastructure development. The sector continues to attract robust capital inflows to support this scaling process; according to the Good Food Institute's 'State of the Industry Report: Fermentation' from May 2025, the sector demonstrated financial resilience by raising \$651 million in total private funding throughout 2024. To convert this capital into operational capacity, companies are aggressively funding physical infrastructure, as evidenced by Liberation Labs securing \$50.5 million in convertible note funding in January 2025 to finalize its commercial-scale biomanufacturing facility in Indiana.

Market Challenge

The Global Fermented Ingredients Market is critically impeded by the high capital expenditure required to establish and scale fermentation infrastructure. Unlike sectors with low physical asset requirements, fermentation necessitates massive upfront investment in bioreactors, downstream processing equipment, and specialized facilities before meaningful revenue can be generated. This financial barrier prevents many companies from transitioning from pilot scale to commercial production, creating a bottleneck where innovative technologies fail to reach the market due to a lack of manufacturing capacity, consequently keeping the supply of novel ingredients

constrained and unit costs artificially high compared to conventional commodities.

This infrastructure bottleneck is exacerbated by a tightening investment climate that restricts the flow of capital needed for such asset-heavy projects. Without sufficient funding, companies cannot construct the large-scale facilities necessary to achieve price parity with animal-based or synthetic alternatives. According to the Good Food Institute, the fermentation sector attracted \$651 million in total funding in 2024, a figure that highlights a constrained environment relative to the substantial resources required for global infrastructure build-out. This shortfall directly slows the pace at which new capacity can be brought online and stalls the broader commercialization of fermentation-derived ingredients.

Market Trends

The integration of bio-fermented ingredients in "nutri-cosmetics" and skincare is fundamentally altering the personal care sector by replacing chemically synthesized actives with sustainable, high-efficacy bio-equivalents. Manufacturers are increasingly utilizing precision fermentation to engineer specific molecules, such as low-molecular-weight hyaluronic acid, which offer superior skin penetration while drastically lowering resource consumption. This convergence of biotechnology and beauty creates a scalable pathway to meet "clean label" demands without compromising performance or depleting natural resources; according to a January 2024 corporate press release from Givaudan Active Beauty, its precision-fermented ingredient PrimalHyal 50 Life achieved a 91% reduction in environmental impact compared to conventional production methods.

Simultaneously, the market is witnessing a decisive shift from live probiotic strains to stable postbiotic ingredient formulations, overcoming the logistical limitations of cold-chain distribution. Unlike probiotics, which require viability preservation, postbiotics consist of inanimate microorganisms and bioactive metabolites that remain effective under high-heat processing and extended storage conditions, enabling their incorporation into diverse shelf-stable applications like baked goods and beverages. This transition allows brands to functionalize mainstream food products with microbiome benefits previously restricted to chilled dairy. According to an ADM consumer perception study from October 2024, 89% of participants in the United States expressed openness to trying products containing postbiotics based on their perceived health benefits, validating the commercial potential of this functional evolution.

Key Market Players

DuPont de Nemours, Inc.

Kerry Group plc

Cargill, Incorporated

BASF SE

Chr. Hansen Holding A/S

Ajinomoto Co., Inc.

Lonza Group Ltd.

Lallemand Inc.

Evonik Industries AG

Lesaffre

Report Scope

In this report, the Global Fermented Ingredients Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Fermented Ingredients Market, By Type

Amino Acids

Organic Acids

Industrial Enzymes and Others

Fermented Ingredients Market, By Form

Dry and Liquid

Fermented Ingredients Market, By Process

Batch Fermentation

Continuous Fermentation

Aerobic Fermentation and Anaerobic Fermentation

Fermented Ingredients Market, By Application

Food & Beverages

Feed

Pharmaceuticals and Others

Fermented Ingredients Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Fermented Ingredients Market.

Available Customizations:

Global Fermented Ingredients Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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