

Natural Sweeteners Market – Global Industry Size, Share, Trends, Opportunity and Forecast, Segmented By Type (Honey, Molasses, Dates, Stevia, Others), By Application (Food and Beverages, Bakery & Confectionery, Personal Care & Cosmetics, Pharmaceuticals, Others), By Distribution Channel (Store-Based, Non-Store Based), By Region & Competition, 2021-2031F

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Abstracts

The Global Natural Sweeteners Market is projected to expand significantly, growing from USD 25.49 Billion in 2025 to USD 36.82 Billion by 2031, demonstrating a compound annual growth rate (CAGR) of 6.32%. Natural sweeteners, encompassing both caloric and non-caloric options like stevia, monk fruit, and agave, are derived from plants and offer sweetness with a reduced metabolic impact compared to refined sugar. This market growth is primarily driven by the rising global incidence of lifestyle diseases such as diabetes and obesity, which compels a dietary shift towards low-glycemic alternatives. Additionally, increasing consumer demand for clean-label food formulations further propels the adoption of these natural substitutes. For instance, in 2025, 63% of consumers expressed concerns about sugar content in their diets, according to the International Food Information Council, reinforcing the industry's move towards natural sweeteners. However, the market faces a substantial challenge due to the high costs associated with extracting and purifying high-quality botanical glycosides. This financial barrier often results in a premium price point for natural sweeteners compared to synthetic options or conventional sucrose, which can limit their widespread adoption in price-sensitive developing economies and hinder overall market expansion.

Market Driver

Stringent government regulations and the widespread implementation of sugar taxes are serving as a significant external catalyst for the global natural sweeteners market. Governments worldwide are actively seeking to reduce sugar consumption, thereby compelling food and beverage manufacturers to reformulate their products with natural, non-caloric alternatives like stevia and monk fruit to avoid financial penalties. This evolving legislative landscape places immediate financial pressure on major beverage companies, encouraging them to incorporate plant-based glycosides, which enables them to maintain desired sweetness levels while circumventing taxation thresholds. As reported by Beverage Daily in April 2024, there are now 108 national sugar-sweetened beverage taxes globally, highlighting a tightening regulatory environment that is accelerating the industry's pivot away from high-fructose corn syrup and refined sucrose. Simultaneously, the increasing global prevalence of diabetes and obesity is fundamentally reshaping consumer demand, necessitating a shift towards functional, low-glycemic ingredients. As health consciousness continues to rise, consumers are meticulously examining product labels for artificial additives, leading to a substantial increase in the integration of natural sweeteners into functional foods. Projections from the World Obesity Federation's March 2024 'World Obesity Atlas 2024' indicate that the number of adults living with obesity could reach 1.53 billion by 2035, emphasizing the urgent need for scalable dietary solutions. This demographic reality is driving extensive commercial reformulation efforts; for example, Tate & Lyle reported in 2024 that their portfolio of low and no-calorie sweeteners contributed to removing 9 million tonnes of sugar from consumer diets, underscoring the profound scale of this health-driven market transformation.

Market Challenge

The Global Natural Sweeteners Market faces a significant obstacle to its expansion due to the elevated extraction and purification costs associated with producing high-quality botanical glycosides. The intricate processes involved in manufacturing these ingredients necessitate a premium pricing structure that considerably surpasses that of traditional sucrose and synthetic alternatives. Consequently, manufacturers operating in price-sensitive developing economies are often hesitant to integrate these natural options into their products, as doing so would either severely diminish profit margins or compel them to set retail prices beyond the reach of the average consumer. This financial constraint effectively restricts the adoption of natural sweeteners primarily to niche premium segments rather than facilitating their widespread use in mass-market applications. This economic disparity is further compounded by the persistent

affordability and robust supply of conventional sugar, which makes bridging the cost gap even more challenging for natural sweetener producers. The competitive landscape is heavily influenced by the readily available supply of conventional sweeteners, which reinforces their position as the default choice for cost-conscious industrial producers. The International Sugar Organization, in November 2025, projected a global sugar surplus of 1.625 million metric tons for the 2025-26 season. This anticipated oversupply ensures that conventional sugar remains a low-cost commodity, thereby directly impeding the growth of the natural sweeteners sector by rendering the transition to cleaner, yet more expensive, alternatives financially unfeasible for many large-scale food and beverage companies.

Market Trends

The commercialization of rare sugars, particularly allulose, is evolving from experimental niche applications to full-scale industrial production, primarily driven by its ability to replicate the functional attributes of sucrose without contributing significant calories. Manufacturers are aggressively investing in expanding their production infrastructure to overcome historical supply limitations and price instability, positioning these sweeteners as viable bulk replacements in various products, including beverages and confectionery. This industrial scaling is evidenced by substantial capacity investments, especially in key Asian markets, aimed at meeting global demand. For instance, FoodBev Media reported in September 2024 that Samyang Corporation completed construction of Korea's largest allulose production facility, boasting an annual capacity of 13,000 tons, which represents a 400% increase over its previous output, specifically to support export markets. Concurrently, the market is observing the rapid emergence of sweet proteins as highly potent alternatives that effectively separate sweetness from metabolic impact, a development made commercially feasible through precision fermentation technologies. Unlike conventional botanical extracts, these proteins offer a cleaner taste profile and are metabolized by the body as amino acids, thereby satisfying consumer demand for natural solutions that do not cause spikes in blood glucose or insulin levels. This nascent segment is achieving crucial regulatory milestones, which validate the safety and scalability of these innovative ingredients for integration into mass-market food formulations. As highlighted by Green Queen in September 2025, US startup Oobli received its third FDA approval for the use of sweet proteins in food, specifically a 'no questions' letter for brazzein-54, a sweet protein up to 550 times sweeter than sucrose, thereby paving the way for its broader application in food and beverage products.

Key Market Players

Tate & Lyle plc

Ingredion Inc.,

PureCircle Limited

Nutragene Biotech

Cargill, Incorporated

Organic India Pvt. Ltd

Nutrizo Advancis HealthCare Pvt. Ltd

Report Scope

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

Natural Sweeteners Market, By Type

Honey

Molasses

Dates

Stevia

Others

Natural Sweeteners Market, By Application

Food and Beverages

Bakery & Confectionery

Personal Care & Cosmetics

Pharmaceuticals

Others

Natural Sweeteners Market, By Distribution Channel

Store-Based

Non-Store Based

Natural Sweeteners 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 Natural Sweeteners Market.

Available Customizations:

Global Natural Sweeteners 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL NATURAL SWEETENERS MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Type (Honey, Molasses, Dates, Stevia, Others)
 - 5.2.2. By Application (Food and Beverages, Bakery & Confectionery, Personal Care & Cosmetics, Pharmaceuticals, Others)
 - 5.2.3. By Distribution Channel (Store-Based, Non-Store Based)

- 5.2.4. By Region
- 5.2.5. By Company (2025)
- 5.3. Market Map

6. NORTH AMERICA NATURAL SWEETENERS MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Type
 - 6.2.2. By Application
 - 6.2.3. By Distribution Channel
 - 6.2.4. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Natural Sweeteners Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Type
 - 6.3.1.2.2. By Application
 - 6.3.1.2.3. By Distribution Channel
 - 6.3.2. Canada Natural Sweeteners Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Type
 - 6.3.2.2.2. By Application
 - 6.3.2.2.3. By Distribution Channel
 - 6.3.3. Mexico Natural Sweeteners Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Type
 - 6.3.3.2.2. By Application
 - 6.3.3.2.3. By Distribution Channel

7. EUROPE NATURAL SWEETENERS MARKET OUTLOOK

- 7.1. Market Size & Forecast

- 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Type
 - 7.2.2. By Application
 - 7.2.3. By Distribution Channel
 - 7.2.4. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. Germany Natural Sweeteners Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Type
 - 7.3.1.2.2. By Application
 - 7.3.1.2.3. By Distribution Channel
 - 7.3.2. France Natural Sweeteners Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Type
 - 7.3.2.2.2. By Application
 - 7.3.2.2.3. By Distribution Channel
 - 7.3.3. United Kingdom Natural Sweeteners Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Type
 - 7.3.3.2.2. By Application
 - 7.3.3.2.3. By Distribution Channel
 - 7.3.4. Italy Natural Sweeteners Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Type
 - 7.3.4.2.2. By Application
 - 7.3.4.2.3. By Distribution Channel
 - 7.3.5. Spain Natural Sweeteners Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast

- 7.3.5.2.1. By Type
- 7.3.5.2.2. By Application
- 7.3.5.2.3. By Distribution Channel

8. ASIA PACIFIC NATURAL SWEETENERS MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Type
 - 8.2.2. By Application
 - 8.2.3. By Distribution Channel
 - 8.2.4. By Country
- 8.3. Asia Pacific: Country Analysis
 - 8.3.1. China Natural Sweeteners Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Type
 - 8.3.1.2.2. By Application
 - 8.3.1.2.3. By Distribution Channel
 - 8.3.2. India Natural Sweeteners Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Type
 - 8.3.2.2.2. By Application
 - 8.3.2.2.3. By Distribution Channel
 - 8.3.3. Japan Natural Sweeteners Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Type
 - 8.3.3.2.2. By Application
 - 8.3.3.2.3. By Distribution Channel
 - 8.3.4. South Korea Natural Sweeteners Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast

- 8.3.4.2.1. By Type
- 8.3.4.2.2. By Application
- 8.3.4.2.3. By Distribution Channel
- 8.3.5. Australia Natural Sweeteners Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Type
 - 8.3.5.2.2. By Application
 - 8.3.5.2.3. By Distribution Channel

9. MIDDLE EAST & AFRICA NATURAL SWEETENERS MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Type
 - 9.2.2. By Application
 - 9.2.3. By Distribution Channel
 - 9.2.4. By Country
- 9.3. Middle East & Africa: Country Analysis
 - 9.3.1. Saudi Arabia Natural Sweeteners Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Type
 - 9.3.1.2.2. By Application
 - 9.3.1.2.3. By Distribution Channel
 - 9.3.2. UAE Natural Sweeteners Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Type
 - 9.3.2.2.2. By Application
 - 9.3.2.2.3. By Distribution Channel
 - 9.3.3. South Africa Natural Sweeteners Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast

- 9.3.3.2.1. By Type
- 9.3.3.2.2. By Application
- 9.3.3.2.3. By Distribution Channel

10. SOUTH AMERICA NATURAL SWEETENERS MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Type
 - 10.2.2. By Application
 - 10.2.3. By Distribution Channel
 - 10.2.4. By Country
- 10.3. South America: Country Analysis
 - 10.3.1. Brazil Natural Sweeteners Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Type
 - 10.3.1.2.2. By Application
 - 10.3.1.2.3. By Distribution Channel
 - 10.3.2. Colombia Natural Sweeteners Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Type
 - 10.3.2.2.2. By Application
 - 10.3.2.2.3. By Distribution Channel
 - 10.3.3. Argentina Natural Sweeteners Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Type
 - 10.3.3.2.2. By Application
 - 10.3.3.2.3. By Distribution Channel

11. MARKET DYNAMICS

- 11.1. Drivers

11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

12.1. Merger & Acquisition (If Any)

12.2. Product Launches (If Any)

12.3. Recent Developments

13. GLOBAL NATURAL SWEETENERS MARKET: SWOT ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

14.1. Competition in the Industry

14.2. Potential of New Entrants

14.3. Power of Suppliers

14.4. Power of Customers

14.5. Threat of Substitute Products

15. COMPETITIVE LANDSCAPE

15.1. Tate & Lyle plc

15.1.1. Business Overview

15.1.2. Products & Services

15.1.3. Recent Developments

15.1.4. Key Personnel

15.1.5. SWOT Analysis

15.2. Ingredion Inc.,

15.3. PureCircle Limited

15.4. Nutragene Biotech

15.5. Cargill, Incorporated

15.6. Organic India Pvt. Ltd

15.7. Nutrizo Advancis HealthCare Pvt. Ltd

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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