SCOTTS INTERNATIONAL

Hydrocolloids Market Size and Share Outlook - Forecast Trends and Growth Analysis Report (2025-2034)

Market Report | 2025-08-13 | 178 pages | EMR Inc.

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Report description:

The global hydrocolloids market reached a value of almost USD 11.24 Billion in 2024. The hydrocolloids industry is further expected to grow at a CAGR of 6.50% between 2025 and 2034 to reach a value of nearly USD 21.10 Billion by 2034.

The global hydrocolloids market is supported by North America, which is a leading consumer for hydrocolloids. The hydrocolloids market is driven by the oil well drilling and strong pharma spending in this region. Areas such as the Asia Pacific and the United States are the major producers as well as consumers of hydrocolloids. In Europe, Germany and France are the largest consumers in the hydrocolloids market, aided by the pharmaceutical and food industries in the region.

Corn starch accounts for the largest industry share in the global hydrocolloids market, followed by guar gum, xanthan gum, and carrageenan. India accounts for the largest share of the guar seed production and is the largest exporter of guar gum in the world. The country accounts for 80-85% of the global guar seed and gum production, followed by Pakistan. The future for guar is viewed to be optimistic, due to the large and continuous demand for guar, especially from North America, owing to the shale revolution and the investigation of new oil reserves in China. Asia and Europe are the major producers for xanthan gum, contributing about 80% of the product. The demand for xanthan gum is projected to increase owing to rising oil and gas production in China, along with the increasing demand for the product in the chemical and automobile industries. The demand for xanthan gum is expected to intensify due to the growth of the food and beverage industry in China, Malaysia, India, and Singapore in the forecast period.

Carrageenan has also witnessed increased production in recent years, with the Asia Pacific contributing to a significant portion of the production share. The industry is especially large in the Asia Pacific as compared to North America and Europe due to an increase in the demand from the fast and processed food sector, accelerating the industry in the Asia Pacific region. The Philippines is the largest producer of carrageenan, accounting for 77% of the world's supply of the hydrocolloid. In the Asia Pacific, China is the key exporter of carrageenan to the United States and Europe. The product is usually used in the confectionery industry in the United States for the suspension of chocolates.

Key Trends and Developments

Growing uses of hydrocolloids in the food industry; rising demand for natural beauty products; robust growth of the pharmaceuticals sector; and increasing focus on sustainability are favouring the hydrocolloids market expansion.

October 2024

Jungbunzlauer broke ground on a USD 150 million facility to produce xanthan gum at its site in Port Colborne, Ontario, for use in the pharmaceuticals, food, and cosmetics sectors. The new facility aims to utilise the agricultural advantages of the Niagara region by sustainably sourcing local Ontario corn and featuring advanced wastewater recycling technologies.

February 2024

Ingredion Incorporated announced NOVATION Indulge 2940 starch, expanding its range of clean label texturisers. The non-GMO functional native corn starch provides a unique texture for co-texturising and gelling for popular dairy and alternative dairy products and desserts.

October 2021

Cargill expanded its portfolio of carrageenans with the launch of kappa carrageenan, branded Satiagel VPC614. The carrageenan, ideal for high gelling applications and solid formulations, taps into the customer demand for eco-friendly personal care products that combine performance with sustainable sourcing.

February 2021

Jungbunzlauer announced the launch of a high acyl gellan gum under the brand TayaGel. The highly functional hydrocolloid, intended for use as an additive in both food and non-food applications, is part of the company's product group, Biogums. While TayaGel HA is a general-purpose hydrocolloid, TayaGel HA-D offers specific compatibility with dairy products.

Extensive uses of hydrocolloids in the food industry

The food industry utilises hydrocolloids as thickening, gelling, stabilising, and emulsifying agents to enhance the sensory experiences of food products, extend their shelf stability, and enable the development of functional and speciality foods. Moreover, hydrocolloids, due to their ability to control the release of active ingredients and digestive health benefits, are widely used in health and functional foods.

Rising demand for natural beauty products

The growing demand for natural beauty products is boosting the hydrocolloids market revenue. Hydrocolloids derived from renewable and natural sources like seaweed, bacteria, and plants are increasingly used in natural and clean beauty products due to their thickening, hydrating, stabilising, and emulsifying properties.

Increasing use of hydrocolloids in pharmaceutical applications

Due to their excellent biological properties, biocompatibility, and low toxicity, hydrocolloids are widely used in the fabrication of nanocarriers for controlled and targeted drug delivery. In addition, hydrocolloids, by modifying the release rate of drugs, improve the bioavailability of poorly soluble drugs, making them indispensable in pharmaceutical applications.

Growing focus on sustainability

Hydrocolloids are derived from natural polymers extracted from plant exudates, seaweed, and microbial fermentation, the cultivation of which can lead to loss of biodiversity and habitat destruction, among other environmental issues. With the growing trend of sustainability, key players are sustainably sourcing hydrocolloids and seeking certifications for sustainable and ethical sourcing.

Market Segmentation

Hydrocolloid is defined as a colloid system that forms a gel when it comes in contact with water. It can be both reversible and irreversible (single state). For example, agar is a reversible hydrocolloid of seaweed extract and can exist in gel and solid-state, and change states through the use or avoidance of heat.

Market Breakup by Product

- Corn Starch
- Guar Gum
- Carrageenan
- Xanthan Gum
- Others

Market Breakup by Region

- North America
- Europe
- Asia Pacific
- Latin America
- Middle East and Africa

Market Analysis

The global hydrocolloids market is driven by the rising oil well drilling and strong pharma spending. The corn starch is the leading segment of the hydrocolloids market, aided by the huge demand from the food sector and the oil and gas industry. Xanthan gum and carrageenan are also witnessing a rising demand from the food and beverage sector due to the growing health consciousness among the consumers and the diverse functionality of hydrocolloids.

There is a considerable demand for guar gum due to its favourable properties, such as natural thickness and biodegradability, which is aiding the growth of the overall hydrocolloids market. The production of guar gum is expected to increase in the forecast period due to the expected rise in the guar production during the summer season. The guar gum industry is highly influenced by the oil and gas industry, owing to the usage of guar gum in the form of drilling aids to maintain viscosity and mitigate friction during oil well fracturing and stimulation process. Thus, the guar gum industry is growing at a steady pace due to the growth of the oil and gas industry.

Competitive Landscape

Key hydrocolloids market players are offering eco-friendly and responsibly sourced hydrocolloids while emphasising transparency and traceability in their supply chain. Hydrocolloids companies are also developing non-GMO and natural hydrocolloid products to meet the clean-label requirements of customers.

Ingredion Incorporated

Ingredion Incorporated, founded in 1906 and headquartered in Illinois, United States, is a leading global ingredients solution provider that serves customers in more than 120 countries across the world. The company turns fruits, grains, vegetables, and other plant-based materials into value-added ingredients for use in the animal nutrition, food, beverage, and industrial sectors.

Kerry Group plc

Kerry Group plc, headquartered in Kerry, Ireland, and founded in 1972, is a prominent food and beverage company. It has also established its position as a leader in the pharmaceutical sector. The company boasts over 22,000 employees and more than 150 manufacturing and innovation centres across 30 countries.

Daicel Corporation

Daicel Corporation, headquartered in Osaka, Japan, and established in 1919, is a prominent chemical company. It is also a pioneer of acetic acid manufacturing in Japan and boasts an extensive product portfolio, ranging from general-purpose resins to engineering plastics. With an employee base of over 11,000, the company achieved annual sales of JPY 558.1 billion in FY 2023-24.

Lotus Gums & Chemicals

Lotus Gums & Chemicals, founded in 1981 and headquartered in Rajasthan, India, is a prominent supplier of high-quality guar gum at competitive prices. The company's modern and sophisticated plant, featuring advanced equipment, boasts a manufacturing capacity of 1000-1200 MT of guar gum powder per month.

Other key players in the hydrocolloids market are Cargill, Incorporated, and Archer Daniels Midland Company, among others.

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