

## **Europe Sugar Substitute - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

Europe Sugar Substitute Market Analysis

The Europe sugar substitutes market size stands at USD 2.43 billion in 2025 and is forecast to advance at a 2.97% CAGR to USD 2.81 billion by 2030. This growth is driven by a well-established regulatory framework, continuous product reformulations within the food and beverage industries, and a gradual consumer preference for healthier alternatives. Germany's regulatory leadership, along with anti-dumping measures on erythritol, has ensured stable domestic production, mitigated price volatility, and strengthened manufacturers' confidence in supply reliability. The adoption of fermentation-derived stevia and monk fruit has increased significantly, with clean-label claims commanding retail price premiums. Although high-intensity sweeteners continue to dominate in terms of volume, polyols, and plant-derived alternatives are capturing higher consumer spending, particularly as their applications in pharmaceuticals and sports nutrition expand. To reduce the carbon footprint of sweetening solutions, companies are leveraging strategies such as precision fermentation, vertical integration, and enhanced life-cycle transparency, which have become critical competitive differentiators.

Europe Sugar Substitute Market Trends and Insights

Surge in clean-label preference for natural sweeteners

European consumers are placing greater emphasis on scrutinizing ingredient lists, driving a significant increase in demand for plant-derived sweeteners that align with transparency and clean-label expectations. This evolving consumer preference is

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compelling food manufacturers to reevaluate their procurement strategies, prioritizing natural alternatives such as stevia, monk fruit, and other botanical sweeteners over synthetic compounds to meet these requirements. Regulatory advancements, including the approval of fermentation-derived stevia variants like DSM-Firmenich and Cargill's EverSweet by EFSA and FSA, are expanding the range of formulation possibilities while ensuring compliance with clean-label standards. Additionally, the willingness of consumers to pay a premium for natural alternatives creates lucrative margin opportunities, as they increasingly favor products featuring botanical sweeteners over those containing artificial ingredients.

#### Expansion of low/no-sugar products fueling market growth

The European beverage sector is undergoing a significant transformation, with an increasing focus on low and no-calorie options. This shift is not only redefining the beverage market but also creating substantial growth opportunities for sugar substitute suppliers. Furthermore, this trend extends beyond beverages, influencing the confectionery, dairy, and bakery markets, where manufacturers are actively reformulating their flagship products to align with evolving consumer preferences while maintaining the original taste profiles. Addressing this demand, Kerry's Tastesense Advanced range offers a solution capable of achieving up to a 100% reduction in sugar content without compromising the sensory qualities that consumers expect. The energy drink category, in particular, is driving innovation within the sector. Brands are introducing products fortified with BCAAs and vitamins, alongside sugar-free formulations, to cater to the growing health-conscious demographic. Supporting this industry-wide shift, regulatory initiatives such as the Union of European Beverage Associations' target of a 10% sugar reduction by 2025 are providing a strong framework that sustains and accelerates long-term growth trajectories across the sector.

#### Stringent EU novel-food approval delays for new sweeteners

EFSA's stringent assessment process for novel foods ensures consumer safety but also imposes significant barriers to market entry. This approach restricts innovation and alters the competitive dynamics within the European sugar substitutes market. For instance, D-allulose remains unapproved in Europe, despite receiving authorizations in other regions, due to incomplete evaluations resulting from insufficient hazard characterization data. Similarly, monk fruit extract faces regulatory inconsistencies, with aqueous extracts approved while concentrated extracts remain prohibited due to gaps in safety data. These inconsistencies limit manufacturers' ability to develop optimal sweetening solutions. The updated EFSA guidance, effective February 2025, seeks to enhance clarity but continues to mandate comprehensive dossiers. These include detailed production processes, composition data, and extensive toxicological information, often extending approval timelines beyond 18 months for complex applications. Such delays particularly impact biotechnology companies developing precision fermentation sweeteners, where regulatory uncertainty constrains investment decisions and market entry strategies.

Other drivers and restraints analyzed in the detailed report include:

Soaring diabetes and obesity rates fueling demand for low-calorie sweeteners / EU sugar-reduction legislation accelerating reformulation / High production costs of sugar substitutes impact market growth /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

In 2024, acesulfame K, aspartame, and sucralose, high-intensity molecules, dominate the European sugar substitutes market, making up 61.25% of total revenue. Their widespread use in key applications like soft drinks, tabletop sachets, and chewing gum solidifies their market leadership. These molecules benefit from economies of scale, ensuring cost efficiency and consistent supply, which further strengthens their position in the market. Meanwhile, polyols are carving out a significant growth segment, with projections showing a robust CAGR of 8.31% through 2030. This surge is largely attributed to sorbitol's essential role in

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pediatric syrups, where it acts as a sweetener and stabilizer, xylitol's recognized dental care advantages, including its ability to reduce cavity-causing bacteria, and erythritol's distinctive cooling mouthfeel, which enhances its use in confectionery and beverages. Collectively, these factors are driving the increasing adoption of polyols across diverse industries.

Stevia Rebaudioside M, crafted through precision fermentation, is overcoming traditional taste hurdles, such as bitterness and aftertaste, prompting reformulations in baked goods and broadening its food industry adoption. This innovation is particularly significant as it allows manufacturers to create products with improved taste profiles while maintaining natural and clean-label claims. Moreover, the raised Acceptable Daily Intake (ADI) of acesulfame K to 15 mg/kg has expanded its application range, paving the way for zero-sugar Cola launches and other low-calorie beverages. The European sugar substitutes sector is also aligning more closely with pharmaceutical industry regulations, spurring the dual-use adoption of polyols in both food and pharmaceutical formulations. This regulatory alignment is fostering innovation, enabling manufacturers to develop multifunctional products, and driving overall market growth.

In 2024, synthetic variants accounted for 56.83% of the market revenue but grappled with challenges tied to consumer perception, particularly concerns about artificial ingredients and potential health risks. In contrast, plant-derived alternatives surged ahead, boasting a robust CAGR of 9.17%, driven by increasing consumer demand for natural and clean-label products. Initiatives in Greece and Spain, such as tobacco-to-stevia conversion projects, are bolstering carbon sustainability by reducing reliance on traditional agricultural practices and promoting eco-friendly production methods. Synthetic variants, known for their high sweetness intensity, with sucralose being 600 times sweeter than sugar, find extensive use in processed foods, diet soft drinks, and pharmaceuticals due to their cost-effectiveness and stability in various formulations. Dominating the beverages and dessert segments are sucralose and Acesulfame-K, which continue to be preferred for their ability to maintain taste profiles without adding calories.

Consumers, especially those diabetic or weight-conscious, increasingly view plant-derived sweeteners as healthier and safer options, aligning with the growing trend toward health-conscious eating habits. Stevia, at the forefront of this segment, sees its applications spanning yogurts, beverages, and baked goods, supported by its natural origin and minimal impact on blood sugar levels. Biotechnological fermentation is carving a niche, merging natural claims with industrial efficiency by enabling the production of high-purity sweeteners at scale. After receiving EFSA clearance, Cargill's EverSweet steviol glycosides and DSM-Firmenich's Rebaudioside M have made their way to European soda fountains, offering manufacturers a reliable supply of high-quality sweeteners. Moreover, there's a rising consumer acceptance of precision-fermented products, with many viewing them as nature-identical, alleviating previous skepticism and paving the way for broader adoption in the food and beverage industry.

The Europe Sugar Substitutes Market Report is Segmented by Type (High-Intensity Sweeteners, Sugar Polyols), Origin (Plant-Derived, Synthetic, Biotechnologically Fermented), Form (Powder, Liquid), Application (Food, Beverage, Pharmaceuticals, Other Applications), and Geography (United Kingdom, Germany, Spain, France, Italy, Russia, Rest of Europe). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Tons).

List of Companies Covered in this Report:

Cargill, Incorporated / The Archer-Daniels-Midland Company / Tate & Lyle PLC / Ingredion Inc. / Roquette Freres / Kerry Group plc / Sudzucker AG / DSM-Firmenich AG / International Flavors & Fragrances, Inc. / Tereos SCA / GLG Life Tech corp. / Evolva Holding SA / Givaudan SA / HSWT France SAS / Sensient Technologies Corporation / Axiom Foods, Inc. / Morita Kagaku Kogyo co., Ltd. / Zhejiang Huakang Pharmaceutical co., Ltd. / Corbion N.V. / Oviatis /

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