

## **North America Sugar Substitutes - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

North America Sugar Substitutes Market Analysis

The North America sugar substitutes market size reached USD 2.76 billion in 2025 and is projected to grow to USD 3.27 billion by 2030, registering a steady compound annual growth rate (CAGR) of 3.48%. This growth is driven by several factors, including stricter labeling regulations, an increasing number of health-conscious consumers, and efforts by major food and beverage companies to reformulate their products to include healthier alternatives. Industry consolidation, such as Tate & Lyle's acquisition of CP Kelco, highlights a shift toward high-margin specialty ingredients while ensuring stable supply chains for essential plant-based raw materials. Market dynamics possess a clear regional concentration, with the United States leading the sugar substitutes market in North America, while Mexico is emerging as the fastest-growing area. High-intensity sweeteners hold the dominant position in the market, although sugar polyols are expanding rapidly due to their functional benefits, particularly in pharmaceutical uses. While synthetic sweeteners continue to account for the largest share, natural alternatives are gaining momentum as demand for clean-label and plant-based products strengthens. The North America sugar substitutes market is moderately fragmented, with several players competing in the space. Large companies such as Cargill, Incorporated, Ingredion, and Tate & Lyle hold significant influence due to their scale, global distribution networks, and strong research and development capabilities, the market also sees robust competition from niche, privately held firms like SweeGen, Pyure Brands.

North America Sugar Substitutes Market Trends and Insights

Clean-label movement accelerating adoption for natural sweeteners

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The clean-label movement is making natural sweeteners increasingly popular in North America, as consumers now prefer plant-based and easily recognizable ingredients over artificial ones. This shift has led many well-known brands to replace synthetic sweeteners like aspartame and sucralose with enzyme-modified steviol glycosides, which are derived from natural sources. Regulatory changes are also playing a key role in this transition. In January 2025, the FDA updated its definition of "healthy," which now excludes high-intensity sweeteners from being counted as added sugars. This update provides brands with a significant advantage in marketing their products as healthier choices. Sustainability concerns are influencing this trend. Stevia has a much lower carbon footprint compared to traditional cane sugar. Companies like Tate & Lyle plc are taking proactive measures. For instance, in 2024, Tate & Lyle plc partnered with Manus Bio to produce Reb M stevia entirely within the Americas. This collaboration demonstrates how clean-label preferences are transforming supply chains to align with consumer demand for healthier, more sustainable, and environmentally friendly options.

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

The growing demand for low and no-sugar products is driving the use of low-calorie sweeteners as food and beverage companies adjust to changing consumer preferences. A 2024 IFIC Food and Health survey shows that 66% of consumers are interested in reduced-sugar products, highlighting a shift toward healthier choices. This trend is especially noticeable in the beverage industry. For instance, Coca-Cola HBC reported that 21% of its 2024 revenue came from low or no-sugar drinks. Similarly, PepsiCo launched Gatorade Hydration Booster in 2024, a product with no artificial sweeteners or flavors, aimed at consumers looking for cleaner labels. These examples show how major brands are using low-calorie sweeteners to stay relevant with health-conscious buyers. The increasing use of GLP-1 weight management drugs is influencing food choices, as these medications lead users to cut back on sweetened products. This has further boosted the demand for sugar substitutes. For example, Cargill launched the EverSweet + ClearFlo Stevia System in North America, which combines steviol glycosides with a taste-enhancing agent to improve flavor, solubility, and stability.

#### Regulatory ambiguity around novel sweeteners

Regulations for new sweeteners are becoming more challenging, creating significant obstacles for companies, especially smaller or newer ones. In March 2025, the U.S. Department of Health and Human Services (HHS) removed the option for companies to self-declare their ingredients as GRAS (Generally Recognized As Safe). This means that all new sweeteners must now go through a full FDA approval process before they can be sold. This change has made it more expensive and time-consuming for companies to introduce new ingredients, as they now need to conduct extensive safety testing. As of late 2024, over 50 GRAS applications are still waiting for FDA review, including innovative ingredients like enzyme-modified stevia and sweet proteins. These delays in approval are slowing down innovation and making it harder for brands to access new, clean-label sweeteners that consumers increasingly prefer. For smaller companies, this regulatory shift adds significant pressure, as they often lack the resources to navigate the lengthy and costly approval process.

Other drivers and restraints analyzed in the detailed report include:

Soaring diabetes rates fueling demand for low-calorie sweeteners / Rising Shift to Lower-Carbon Footprint Ingredients / Consumer safety perception issues around artificial sweeteners /

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

#### Segment Analysis

Sugar polyols are expected to grow significantly, with a projected CAGR of 4.12%, as they increasingly replace high-intensity

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sweeteners in certain applications. These polyols, such as xylitol and erythritol, are gaining popularity due to their ability to provide bulk and retain moisture, making them highly effective in products like tablet coatings and controlled-release capsules. These functional benefits are driving their adoption in the pharmaceutical sector, where they help ensure the required compression strength and moisture control. Advancements in production technologies, such as circular-economy fermentation using lignocellulosic biomass, are reducing manufacturing costs. This cost reduction is encouraging more companies to incorporate polyols into their formulations.

Despite the growth of polyols, high-intensity sweeteners remain the dominant segment in the North America sugar substitutes market, holding a 59.76% share in 2024. These sweeteners have maintained their position due to their long-established safety records and cost efficiency. However, their growth has slowed as regulatory scrutiny increases and consumer preferences shift toward natural and less processed options. To stay competitive, manufacturers of high-intensity sweeteners are focusing on developing next-generation products like brazzein and sucrose-binding sweet proteins. These innovations aim to enhance taste by reducing bitterness without the need for bulking agents.

Synthetic sugar substitutes accounted for 66.33% of the market share in 2024, driven by their widespread use in legacy formulations and cost advantages. These synthetic variants remain a preferred choice, especially in industrial bakeries, due to their superior heat stability and affordability. Despite their dominance, the market is witnessing a gradual shift as natural sweeteners gain traction. Natural sugar substitutes, such as enzyme-converted Reb M and monk fruit extracts, are growing at a CAGR of 5.23%. This growth is fueled by increasing consumer demand for clean-label products and sustainability-focused narratives. Innovations like Cargill's yeast-based EverSweet production method enable large-scale manufacturing of nature-identical molecules, which meet "from natural sources" labeling requirements without relying on traditional crop yields.

The trend toward natural sweeteners is particularly evident in premium product ranges, where "natural" is becoming a standard expectation. Industries such as brewing, dairy, and nutraceuticals are increasingly adopting fermented steviol glycosides to ensure a consistent supply while mitigating risks associated with agricultural dependency. On the other hand, synthetic sweetener suppliers are responding to this shift by offering large-volume discounts and enhanced technical support to retain their customer base. However, they face growing challenges, including rising input costs for corn-based raw materials, which are putting pressure on profit margins. The competition between synthetic and natural sugar substitutes is expected to intensify, with natural options gaining more ground in response to consumer preferences and sustainability concerns.

The North America Sugar Substitutes Market Report is Segmented by Type (High Intensity Sweeteners and Sugar Polyols), Origin (Plant Derived, Synthetic and More), Form (Powder and Liquid), Application (Food, Beverage and More), and Geography (United States, Canada, Mexico and Rest of North America). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Cargill, Incorporated / Ingredion Incorporated / Archer Daniels Midland Company / Tate & Lyle PLC / International Flavors & Fragrances Inc. / BioNeutra Global Corporation / Pyure Brands, LLC / Roquette Freres / SweeGen, Inc. / GLG Life Tech Corporation / Ajinomoto Co., Inc. / Celanese Corporation / Merck KGaA / JK Sucralose Inc. / HYET Sweet B.V. / Lallemand Inc / Steviva Brands, Inc. / NutraEx Food Inc / Cumberland Worldwide Holdings, Inc / Kerry Group PLC /

Additional Benefits:

<ul> The market estimate (ME) sheet in Excel format /  
3 months of analyst support / </ul>

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