

## **Polyol Sweeteners - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 120 pages | Mordor Intelligence

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### **Report description:**

Polyol Sweeteners Market Analysis

The polyol sweeteners market was valued at USD 3.66 billion in 2025 and estimated to grow from USD 3.89 billion in 2026 to reach USD 5.26 billion by 2031, at a CAGR of 6.23% during the forecast period (2026-2031). The market growth is driven by increasing consumer demand for healthier alternatives and supportive regulations for low-calorie sweeteners. The rising prevalence of diabetes and obesity worldwide has led consumers to seek sugar substitutes, making polyols an attractive option due to their lower caloric content and minimal impact on blood sugar levels. The European Food Safety Authority's (EFSA) re-evaluation of erythritol (E 968) in December 2023 confirmed its safety as a polyol sweetener. The assessment verified that erythritol is non-genotoxic, maintains blood sugar stability, and retains its properties during food processing. These findings support the continued use of erythritol in food and beverage manufacturing, particularly in diabetic-friendly and low-calorie products. Additionally, the food and beverage industry's continuous innovation in sugar-free and reduced-sugar products has increased the adoption of polyols across various applications, including confectionery, baked goods, and dairy products.

Global Polyol Sweeteners Market Trends and Insights

Consumer shift towards sugar free confectionery boosting polyols usage

The confectionery market is experiencing a significant shift toward sugar-free products due to increasing consumer preferences for reduced sugar consumption. Health-conscious consumers are actively seeking alternatives to traditional sugar-based

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confectionery products, driving manufacturers to reformulate their offerings. This trend has evolved from serving primarily diabetic consumers to encompassing mainstream confectionery products across various categories, including chocolates, candies, and gummies. Polyols are essential in this transformation as they provide the necessary bulk and texture that intense sweeteners alone cannot deliver. These sugar alcohols maintain the mouthfeel, sweetness profile, and structural integrity of confectionery products while offering reduced caloric content and improved dental benefits compared to conventional sugar-based alternatives. Advancements in polyol blending technologies enable confectionery manufacturers to replicate sugar-like taste profiles while managing costs. The demand for polyols increases as major confectionery companies incorporate these ingredients into their main product lines instead of creating separate sugar-free variants, expanding their use across both premium and mass-market categories.

#### Rising demand for low-calorie sweeteners in food industry

Food manufacturers increasingly integrate polyols into mainstream product lines as consumer health consciousness reaches unprecedented levels, driven by rising obesity rates and metabolic health awareness. The WHO's 2024 recommendations against using non-sugar sweeteners for weight control specifically exempt polyols from this guidance, recognizing their distinct metabolic profile and functional benefits. Advancements in polyol production technology, particularly through microbial fermentation systems using CRISPR technology, are reducing manufacturing costs and increasing production capacity for food manufacturers. These technological improvements enable more efficient production processes and higher yields. The market expansion continues as global regulatory authorities streamline polyol approval procedures, making it easier for companies to introduce new food applications across different regions. This regulatory harmonization has significantly reduced the time and resources required for product approvals, encouraging manufacturers to develop innovative polyol-based food products for various markets.

#### High cost of polyols compared to traditional sugar

Polyol production costs exceed traditional sugar prices significantly, with erythritol prices 3-4 times higher than sucrose. The complex manufacturing processes, including specialized fermentation and hydrogenation, create high-cost structures that restrict polyol adoption in price-sensitive markets. These processes require substantial investment in equipment, skilled labor, and quality control measures. Sugar price volatility adds to these challenges, as lower sugar prices increase the cost differential and reduce manufacturers' incentives to adopt polyols. This price sensitivity influences product formulation decisions across the food and beverage industry. The production volumes of specialty polyols, such as erythritol and xylitol, remain substantially lower than established polyols like sorbitol, limiting economies of scale. This restricted production capacity results in higher unit costs and reduced operational efficiency. The cost difference particularly affects developing markets, where consumer price sensitivity restricts the adoption of premium ingredients and constrains market growth in regions with high demographic potential. The limited availability of raw materials and processing facilities in these regions further compounds the production cost challenges.

Other drivers and restraints analyzed in the detailed report include:

Increasing diabetic population accelerating polyol adoption in food  
Surge in clean label trends encouraging use of naturally derived polyols  
Limited consumer awareness in developing economies

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

#### Segment Analysis

Sorbitol commands 33.05% of the polyol sweeteners market in 2025, maintaining the largest market share through its extensive applications in food, pharmaceutical, and industrial sectors. In the food industry, sorbitol serves as a bulk sweetener and humectant in sugar-free products, while pharmaceutical applications utilize it as a stabilizer and binding agent in tablet

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formulations. Its market dominance results from its effectiveness as both a sweetener and functional ingredient, particularly in sugar-free confectionery, diabetic foods, and oral care products.

Erythritol demonstrates the strongest market expansion with a 6.86% CAGR through 2031, driven by its zero-calorie properties and sucrose-like taste profile. Its growing popularity stems from increasing consumer demand for natural, low-calorie sweeteners, especially in beverages, baked goods, and dairy products. The compound's excellent digestive tolerance and tooth-friendly properties further enhance its market appeal. Additionally, maltitol retains a significant market presence in sugar-free confectionery production due to its browning properties and ability to replicate sugar's functionality in chocolate and baked goods.

The Polyol Sweeteners Market Report is Segmented by Product Type (Erythritol, Sorbitol, Maltitol, Isomalt, and Others), Form (Powder and Liquid), Application (Food and Beverages, Pharmaceuticals, Personal Care and Cosmetics, Industrial, and Others), and Geography (North America, Europe, Asia-Pacific, South America, and Middle East and Africa). The Market Forecasts are Provided in Terms of Value (USD).

### Geography Analysis

Asia-Pacific holds a 38.30% market share in 2025, positioning itself as a major producer and consumer of polyols. China's manufacturing capacity significantly influences global supply chains. The region's growth stems from expanding pharmaceutical sectors in India and Southeast Asia, where polyols function as excipients in generic drug production. Increased health awareness in urban areas has led to higher consumption of sugar-free products. The region's progress in biotechnology-based polyol production, particularly in fermentation processes, makes it the global center for polyol technology development.

South America exhibits the highest growth rate at 7.11% CAGR through 2031, supported by expanding food processing industries and economic conditions favoring premium ingredient adoption. Government healthcare programs support pharmaceutical sector growth, increasing demand for polyol excipients in generic drugs. The Middle East and Africa offer growth potential, particularly in pharmaceuticals, where improved healthcare infrastructure drives demand for polyol-based drug delivery systems. Economic diversification into food processing and pharmaceutical manufacturing creates opportunities for polyol suppliers with regulatory compliance and local partnerships.

North America and Europe maintain strong market positions through high-value applications and strict regulatory standards that drive polyol formulation innovation. FDA safety assessments and EFSA support for polyols create a stable regulatory environment, encouraging investment in new applications and production methods. These regions lead clean label trends and natural polyol usage, with consumers accepting premium pricing for sustainably sourced and environmentally produced polyols. European regulations promoting sugar reduction in processed foods maintain polyol demand, while North American diabetes management protocols incorporate polyol-containing products in treatment plans.

### List of Companies Covered in this Report:

Archer Daniels Midland Company Cargill Incorporated International Flavors & Fragrances Inc Roquette Freres Ingredient Incorporated Mitsubishi Corporation (Mitsubishi Corporation Life Sciences Limited ) B Food Science Co., Ltd BENEIO GmbH Gujarat Ambuja Exports Limited DFI Corporation Gulshan Polyols Ltd Beijing Stevia Co., Ltd. Tate & Lyle PLC Shandong Sanyuan Biotechnology Co.,Ltd Hebei Huaxu Pharmaceutical Jungbunzlauer Holding AG (Jungbunzlauer Suisse AG) Van Wankum Ingredients BV (VW-Ingredients) Sinofi Ingredients Foodchem International Corporation Wilmar International (Wilmar Sugar Pty Ltd)

### Additional Benefits:

<ul> The market estimate (ME) sheet in Excel format

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## **Table of Contents:**

### 1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

### 2 RESEARCH METHODOLOGY

### 3 EXECUTIVE SUMMARY

### 4 MARKET LANDSCAPE

4.1 Market Overview

4.2 Market Drivers

4.2.1 Consumer shift towards sugar free confectionery boosting polyols usage

4.2.2 Rising demand for low-calorie sweeteners in food industry

4.2.3 Increasing diabetic population accelerating polyol adoption in food

4.2.4 Surge in clean label trends encouraging use of naturally derived polyols

4.2.5 Application of sorbitol in pharmaceuticals as laxatives and tablet binders

4.2.6 Expanding pet food market incorporating safe sweetening agent like sorbitol

4.3 Market Restraints

4.3.1 High cost of polyols compared to traditional sugar

4.3.2 Limited consumer awareness in developing economies

4.3.3 Inconsistent labeling regulation

4.3.4 Need for technical expertise in polyol formulation for texture optimization

4.4 Supply Chain Analysis

4.5 Regulatory Outlook

4.6 Porter's Five Forces

4.6.1 Threat of New Entrants

4.6.2 Bargaining Power of Buyers/Consumers

4.6.3 Bargaining Power of Suppliers

4.6.4 Threat of Substitute Products

4.6.5 Intensity of Competitive Rivalry

### 5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

5.1 By Product Type

5.1.1 Erythritol

5.1.2 Sorbitol

5.1.3 Maltitol

5.1.4 Isomalt

5.1.5 Others

5.2 By Form

5.2.1 Powder

5.2.2 Liquid

5.3 By Application

5.3.1 Food and Beverages

5.3.2 Pharmaceuticals

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- 5.3.3 Personal Care and Cosmetics
- 5.3.4 Industrial
- 5.3.5 Others
- 5.4 By Geography
  - 5.4.1 North America
    - 5.4.1.1 United States
    - 5.4.1.2 Canada
    - 5.4.1.3 Mexico
    - 5.4.1.4 Rest of North America
  - 5.4.2 Europe
    - 5.4.2.1 Germany
    - 5.4.2.2 United Kingdom
    - 5.4.2.3 Italy
    - 5.4.2.4 France
    - 5.4.2.5 Spain
    - 5.4.2.6 Netherlands
    - 5.4.2.7 Poland
    - 5.4.2.8 Belgium
    - 5.4.2.9 Sweden
    - 5.4.2.10 Rest of Europe
  - 5.4.3 Asia-Pacific
    - 5.4.3.1 China
    - 5.4.3.2 India
    - 5.4.3.3 Japan
    - 5.4.3.4 Australia
    - 5.4.3.5 Indonesia
    - 5.4.3.6 South Korea
    - 5.4.3.7 Thailand
    - 5.4.3.8 Singapore
    - 5.4.3.9 Rest of Asia-Pacific
  - 5.4.4 South America
    - 5.4.4.1 Brazil
    - 5.4.4.2 Argentina
    - 5.4.4.3 Colombia
    - 5.4.4.4 Chile
    - 5.4.4.5 Peru
    - 5.4.4.6 Rest of South America
  - 5.4.5 Middle East and Africa
    - 5.4.5.1 South Africa
    - 5.4.5.2 Saudi Arabia
    - 5.4.5.3 United Arab Emirates
    - 5.4.5.4 Nigeria
    - 5.4.5.5 Egypt
    - 5.4.5.6 Morocco
    - 5.4.5.7 Turkey
    - 5.4.5.8 Rest of Middle East and Africa

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## 6 COMPETITIVE LANDSCAPE

### 6.1 Market Concentration

### 6.2 Strategic Moves

### 6.3 Market Ranking Analysis

6.4 Company Profiles (includes Global-level Overview, Market-level Overview, Core Segments, Financials (if available), Strategic Information, Market Rank/Share, Products, Recent Developments)

#### 6.4.1 Archer Daniels Midland Company

#### 6.4.2 Cargill Incorporated

#### 6.4.3 International Flavors & Fragrances Inc

#### 6.4.4 Roquette Freres

#### 6.4.5 Ingredion Incorporated

#### 6.4.6 Mitsubishi Corporation (Mitsubishi Corporation Life Sciences Limited )

#### 6.4.7 B Food Science Co., Ltd

#### 6.4.8 BENEIO GmbH

#### 6.4.9 Gujarat Ambuja Exports Limited

#### 6.4.10 DFI Corporation

#### 6.4.11 Gulshan Polyols Ltd

#### 6.4.12 Beijing Stevia Co., Ltd.

#### 6.4.13 Tate & Lyle PLC

#### 6.4.14 Shandong Sanyuan Biotechnology Co.,Ltd

#### 6.4.15 Hebei Huaxu Pharmaceutical

#### 6.4.16 Jungbunzlauer Holding AG (Jungbunzlauer Suisse AG)

#### 6.4.17 Van Wankum Ingredients BV (VW-Ingredients)

#### 6.4.18 Sinofi Ingredients

#### 6.4.19 Foodchem International Corporation

#### 6.4.20 Wilmar International (Wilmar Sugar Pty Ltd)

## 7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

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