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South America Food Enzymes - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 90 pages | Mordor Intelligence

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Report description:

South America Food Enzymes Market Analysis

The South American food enzymes market is expected to grow from USD 277.61 million in 2025 to USD 297.41 million in 2026 and is forecast to reach USD 419.79 million by 2031 at 7.13% CAGR over 2026-2031. This growth is driven by increased investments in regional food processing, regulatory alignment across MERCOSUR countries, and growing consumer preferences for lactose-free, gluten-free, and clean-label products. The market expansion is supported by carbohydrase applications in bakery and beverage production, new lipase products for fat modification, and the widespread implementation of microbial fermentation processes. Brazil's updated ANVISA approval system, combined with strategic developments such as those from Novozymes-Chr. Hansen's merger and DSM-Firmenich's manufacturing facility in Minas Gerais indicate increased competition focused on local production, market accessibility, and environmental improvements. Additionally, developments in plant-based and cold-active enzymes create opportunities for regional market participants.

South America Food Enzymes Market Trends and Insights

Enhanced Efficiency and Yield in Food Manufacturing Through Enzyme Applications

Food processors across South America are adopting enzyme solutions to enhance productivity and reduce operational costs. These enzymes improve process efficiency in baking, dairy, and brewing sectors by enabling better dough handling, accelerating fermentation, extending shelf life, and increasing extraction yields. Brazil's food processing industry, which grew by 17% in

2022/23, exemplifies the expanding regional market for enzyme applications . In starch processing, alpha-amylases facilitate glucose syrup production at optimal pH levels, thereby eliminating the need for costly pH adjustments in high-fructose corn syrup manufacturing. The implementation of enzyme technologies supports both operational optimization and the industry's shift toward cleaner-label products and resource-efficient manufacturing practices, addressing the region's diverse food production needs and environmental priorities.

Surging Demand for Lactose-Free and Digestive Health Products

Lactose intolerance affects a significant portion of the global population, with particularly high prevalence in South America, driving growth in lactose-free dairy products. According to World Population Review, approximately 65% of the adult human population has lactose intolerance as of 2025 . The increasing demand for lactose-free and digestive health products is driving growth in South America's food enzymes market. Consumer awareness of lactose intolerance and focus on gut health has increased the demand for dairy alternatives and fortified foods that support digestive health. Food manufacturers are incorporating enzymes like lactase into products, including low-lactose milk, yogurt, and digestive supplements, to improve digestibility, minimize discomfort, and enhance nutritional absorption. This development aligns with regional public health objectives while creating opportunities for food processors to develop clean-label, functional products.

Regulatory Compliance and Labeling Requirements Impact Market Growth

The regulatory environment in South America presents significant compliance challenges for enzyme manufacturers. MERCOSUR harmonization initiatives require companies to manage multiple approval processes across different countries. Brazil's ANVISA has implemented new food supplement regulations through Normative Instruction IN No. 284/2028, establishing specific enzyme limits in food supplements. In Argentina, SENASA regulations require comprehensive documentation for enzyme-containing animal feed products, including technical director appointments and compliance with Resolution N 1415/2024. Peru's DIGESA mandates food sanitary registry requirements for enzyme importers, including sworn applications and certificates of free trade and use. These varying safety assessment requirements and premarket approval processes for recombinant enzyme products create additional complexity for manufacturers, particularly affecting smaller companies with limited regulatory expertise and resources.

Other drivers and restraints analyzed in the detailed report include:

Increasing Demand for Enzymes to Improving Food Texture and PalatabilityRising Consumer Preference for Gluten-Free and Plant-Based Products Increases Enzyme DemandImpact of Environmental and Processing Factors on Enzyme Performance

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

Segment Analysis

Carbohydrases hold a 54.32% market share in 2025, dominating applications across the bakery, beverage, and starch processing sectors. Lipase exhibits the highest growth rate with a 7.71% CAGR through 2031, primarily due to increased use in dairy processing and fat modification. Carbohydrases maintain their market leadership through their fundamental role in starch conversion, particularly alpha-amylases in glucose syrup production and bread making. Novozymes' Fungamyl product demonstrates reliable performance in managing flour quality variations.

Protease applications maintain steady growth in meat processing and plant protein modification, though their adoption remains lower than carbohydrases due to complex substrate interactions. Specialized enzymes, including oxidases and transglutaminases, create opportunities in specific applications like Maillard reaction prevention and protein cross-linking. The market favors multi-functional enzymes, exemplified by DSM-Firmenich's RONOZYME MultiGrain, which combines xylanase, glucanase, cellulase, amylase, pectinase, protease, and mannanase for comprehensive carbohydrate processing.

Powder form enzymes hold 67.29% market share in 2025 and are projected to grow at 7.43% CAGR through 2031. This dominance stems from their superior stability, easier handling, and lower transportation costs compared to liquid enzymes. Food manufacturers prefer powder enzymes as they integrate effectively into existing production processes without requiring specialized equipment. Improvements in powder enzyme manufacturing, particularly through spray-drying and freeze-drying methods, improve enzyme stability and maintain activity levels. These technologies extend product shelf life during room temperature storage.

Application requirements determine the choice between powder and liquid forms. Powder enzymes are optimal for dry mix applications and demonstrate better stability during thermal processing, particularly in animal feed production. Liquid enzymes are essential for applications needing immediate activity and precise dosing, such as beverage processing, where direct injection enables better control of enzyme distribution and activity.

The South America Food Enzymes Market is Segmented by Enzyme Type (Carbohydrase, Protease, Lipase, and Others), by Form (Powder, and Liquid), by Source (Plant, Microbial, and Animal), by Application (Bakery and Confectionery, Dairy and Desserts, Beverages, Meat and Meat Products, Soups, and More) and by Geography (Brazil, Argentina and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Creative Enzymes International Flavors & Fragrances, Inc. Ajinomoto Group Kerry Group plc Associated British Foods plc Bio Cat Enzymes & Microbials Archer Daniels Midland (ADM) Novonesis Lallemand Inc. Amano Enzyme Inc. Nagase Group Advanced Enzyme Technologies Brain Biotech Group (Biocatalysts Ltd) Bioseutica Group (Neova Technologies Inc.) Suntaq International Limited Ecolex Group (Futura Ingredients) Jiangsu Yiming Biological Technology Co., Ltd. XIKE Enzymes Enzyme Development Corporation Jiangsu Boli Bioproducts

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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