



# Global Inulin Market

Market size, segmentation, competitive landscape and outlook

2021-2031

## Moving forward, together

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Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

**ANDREY SHEVCHENKO**, Managing Partner

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## Market at a glance

This demo shows the **form and depth** of the report — real narrative with the detailed figures and tables masked as “XXX”. When you order the report, every figure is finalised and verified for your copy, and the full report is delivered within 24–72 hours.

| Indicator              | Value                |
|------------------------|----------------------|
| Market size (2025)     | USD 1.9 bn           |
| Forecast (2031)        | USD 3.1 bn           |
| CAGR (2021-2031)       | 8.6%                 |
| Study period           | 2021-2031            |
| Largest region         | Europe · 36.8%       |
| Fastest-growing region | Asia-Pacific · 10.2% |
| Market concentration   | Moderate             |
| Licence                | Individual / Company |

The global inulin market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at an XX% CAGR. Chicory-derived inulin remains the commercial standard, supported by established European processing capacity, recognized dietary-fiber status and growing use in sugar-reduced foods. Food and beverage applications account for XX% of market value, while dietary supplements and specialized nutrition provide the strongest margin expansion. Asia-Pacific is the fastest-growing regional market as prebiotic positioning, functional beverages and local regulatory approvals broaden adoption.

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## Executive summary

The global inulin market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at an XX% CAGR. Chicory-derived inulin remains the commercial standard, supported by established European processing capacity, recognized dietary-fiber status and growing use in sugar-reduced foods. Food and beverage applications account for XX% of market value, while dietary supplements and specialized nutrition provide the strongest margin expansion. Asia-Pacific is the fastest-growing regional market as prebiotic positioning, functional beverages and local regulatory approvals broaden adoption.

| Indicator        | Value |
|------------------|-------|
| Market size 2025 | XXX   |
| Forecast 2031    | XXX   |
| CAGR             | XXX   |
| Largest region   | XXX   |
| Fastest region   | XXX   |

## Key findings

- The global inulin market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Market revenue will increase at an XX% CAGR between 2025 and 2031, with volume growth reinforced by premium specialized grades.
- Europe held XX% of global market value in 2025 through its concentrated chicory-growing, extraction and formulation ecosystem.
- Asia-Pacific will record the fastest regional CAGR at XX%, led by China, Japan, India and Southeast Asia.
- Chicory root supplied XX% of 2025 market value and remains the preferred feedstock for standardized food-grade and prebiotic inulin.
- Powdered inulin represented XX% of market value because of its stability, transport economics and compatibility with dry formulations.
- Food and beverage manufacturers generated XX% of demand, with dairy, bakery, nutrition bars and sugar-reduced confectionery as the largest formulation clusters.
- Native inulin held XX% of product-type revenue, while high-performance inulin will grow at a XX% CAGR as formulators seek stronger fat-mimetic and texturizing performance.

## Market size and forecast

### Market value by year, USD bn

| Indicator            | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | CAGR |
|----------------------|------|------|------|------|------|------|------|
| Market value, USD bn | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  |
| Market volume        | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  |
| Production           | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  |
| Imports              | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  |
| Exports              | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  |
| Apparent consumption | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  |

Source: XXX

### Year-over-year value change

| Indicator    | 2027 | 2028 | 2029 | 2030 | 2031 | CAGR |
|--------------|------|------|------|------|------|------|
| Market value | X%   | X%   | X%   | X%   | X%   | X%   |
| Production   | X%   | X%   | X%   | X%   | X%   | X%   |
| Imports      | X%   | X%   | X%   | X%   | X%   | X%   |
| Exports      | X%   | X%   | X%   | X%   | X%   | X%   |

Source: XXX

## Global Inulin Market Trends and Growth Drivers

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Inulin sits at the intersection of three food-industry priorities: closing the dietary-fiber gap, reducing sugar and developing microbiome-oriented products. Its commercial advantage is not limited to nutritional labeling; it also replaces bulk, supports browning and improves mouthfeel, allowing formulators to solve several reformulation constraints with one ingredient.

Supply economics remain tied to agricultural and extraction discipline. Chicory processors must secure grower acreage, optimize root inulin yield and operate energy-intensive seasonal plants efficiently, while customers require consistent chain-length distribution and color performance. These constraints favor suppliers with integrated agronomy, processing and application capabilities.

The next phase of market development will be determined by claim quality and formulation outcomes. Explicit prebiotic positioning can raise consumer value, but successful products must deliver tolerated doses, stable sensory performance and compliant wording in each market.

### Growth drivers

#### Mainstream fiber fortification

Packaged-food companies are moving fiber enrichment beyond specialist digestive-health products into bakery, cereals, bars, dairy and beverages. Inulin provides soluble fiber without the grainy texture associated with many insoluble alternatives, allowing manufacturers to improve nutrition panels while retaining familiar product formats.

#### Sugar-reduction reformulation

Inulin replaces part of sugar's bulk and contributes mild sweetness, body and browning in applications where high-intensity sweeteners cannot reproduce functionality alone. Bakery, confectionery and dairy formulators increasingly use inulin within multi-ingredient sugar-reduction systems, raising both dosage and value per formulation.

#### Prebiotic and microbiome demand

Consumer interest in the gut microbiome is widening the addressable market for established prebiotic ingredients. Chicory inulin benefits from extensive human research, recognizable plant sourcing and compatibility with probiotic combinations, making it a preferred substrate in synbiotic products.

#### Texture replacement in reduced-fat foods

Long-chain inulin forms microcrystalline networks that reproduce creaminess and body in reduced-fat dairy, desserts, spreads and plant-based foods. This functional role protects demand from dependence on health claims and supports premium pricing for application-optimized grades.

#### Specialized nutrition expansion

Supplement powders, medical nutrition, sports products and healthy-aging formulations use inulin to raise fiber density and support regularity. These channels accept higher-purity grades, smaller order sizes and stronger technical-service requirements, lifting average selling values.

### **Regulatory recognition of dietary fiber**

Recognition by the U.S. Food and Drug Administration and established European Union nutrition and health-claim frameworks reduce label uncertainty for major multinational customers. The 2025 Thai FDA approval for BENEEO's Orafti Inulin further strengthens prebiotic positioning in Southeast Asia.

## **Restraints**

### **Chicory crop and harvest exposure**

Commercial supply remains concentrated in chicory-growing areas serving a limited number of European processors, with additional production in Chile. Weather, root quality, harvest timing and farmer acreage decisions can constrain throughput and raise procurement costs across an entire campaign.

### **Digestive tolerance threshold**

Rapid fermentation can cause bloating or gastrointestinal discomfort when products deliver high doses or when consumers increase intake abruptly. Formulators must balance claim-supporting quantities against serving size, taste and tolerance, limiting inclusion in compact formats.

### **Substitution by alternative fibers**

Resistant dextrin, polydextrose, acacia fiber and soluble corn fiber compete on cost, tolerance, viscosity and regional labeling treatment. Procurement teams can switch between fiber systems when prebiotic differentiation is secondary to a basic fiber-content claim.

### **Fragmented health-claim regulation**

Permitted wording, evidence standards and minimum effective doses differ materially between the European Union, the United States and Asian jurisdictions. Suppliers must maintain market-specific dossiers and customers frequently restrict communications to nutrition claims rather than broader microbiome benefits.

# Inulin Market Driver and Restraint Impact on the Forecast

## Drivers — impact on forecast

| Driver                                   | Impact on CAGR | Geography | Horizon |
|------------------------------------------|----------------|-----------|---------|
| Mainstream fiber fortification           | XXX            | XXX       | XXX     |
| Sugar-reduction reformulation            | XXX            | XXX       | XXX     |
| Prebiotic and microbiome demand          | XXX            | XXX       | XXX     |
| Texture replacement in reduced-fat foods | XXX            | XXX       | XXX     |
| Specialized nutrition expansion          | XXX            | XXX       | XXX     |
| Regulatory recognition of dietary fiber  | XXX            | XXX       | XXX     |

Source: XXX

## Restraints — impact on forecast

| Restraint                          | Impact on CAGR | Geography | Horizon |
|------------------------------------|----------------|-----------|---------|
| Chicory crop and harvest exposure  | XXX            | XXX       | XXX     |
| Digestive tolerance threshold      | XXX            | XXX       | XXX     |
| Substitution by alternative fibers | XXX            | XXX       | XXX     |
| Fragmented health-claim regulation | XXX            | XXX       | XXX     |

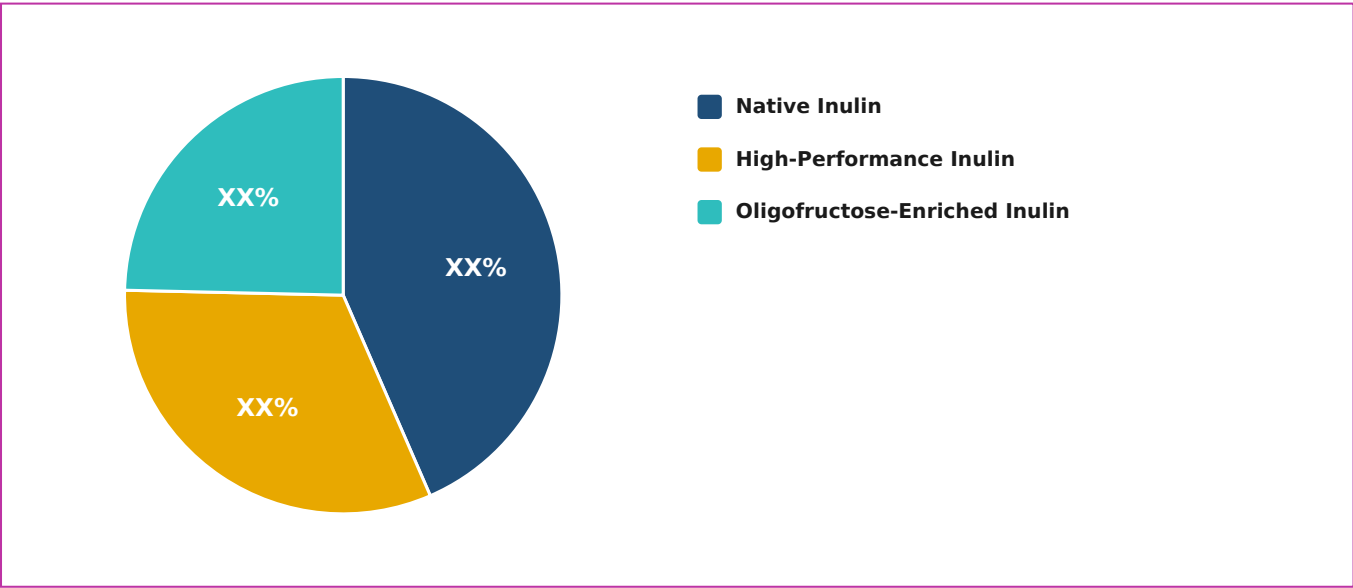
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# Inulin Market Segmentation by Type, Source, Form and Application

## By Product Type

Native inulin remains the volume standard for fiber enrichment, mild sweetness and general prebiotic use. High-performance long-chain grades command higher value in fat replacement and texture-sensitive dairy, dessert and plant-based applications. Oligofructose-enriched inulin expands through synbiotic supplements and products requiring a broader fermentation profile.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

| Segment                       | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|-------------------------------|------|------|------|------|------|------|------------|------|
| Native Inulin                 | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| High-Performance Inulin       | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Oligofructose-Enriched Inulin | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |

Source: XXX

## By Source

Chicory dominates because dedicated varieties, grower contracts and extraction infrastructure deliver consistent chain-length profiles at scale. Agave inulin grows through Mexican sourcing, organic positioning and consumer familiarity in natural products. Jerusalem artichoke and other botanical sources remain regionally important, particularly among Asian suppliers and differentiated supplement brands.

Value by source, USD bn

| Segment                 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|-------------------------|------|------|------|------|------|------|------------|------|
| Chicory Root            | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Agave                   | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Jerusalem Artichoke     | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Other Botanical Sources | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |

Source: XXX

By Form

Powder is preferred for supplements, bakery mixes, nutrition bars, confectionery and export trade because it offers precise dosing and long storage stability. Liquid and syrup forms reduce dissolution requirements in dairy, beverages and continuous processing. Liquid formats will slightly outpace powder as beverage and industrial dairy applications expand.

Value by form, USD bn

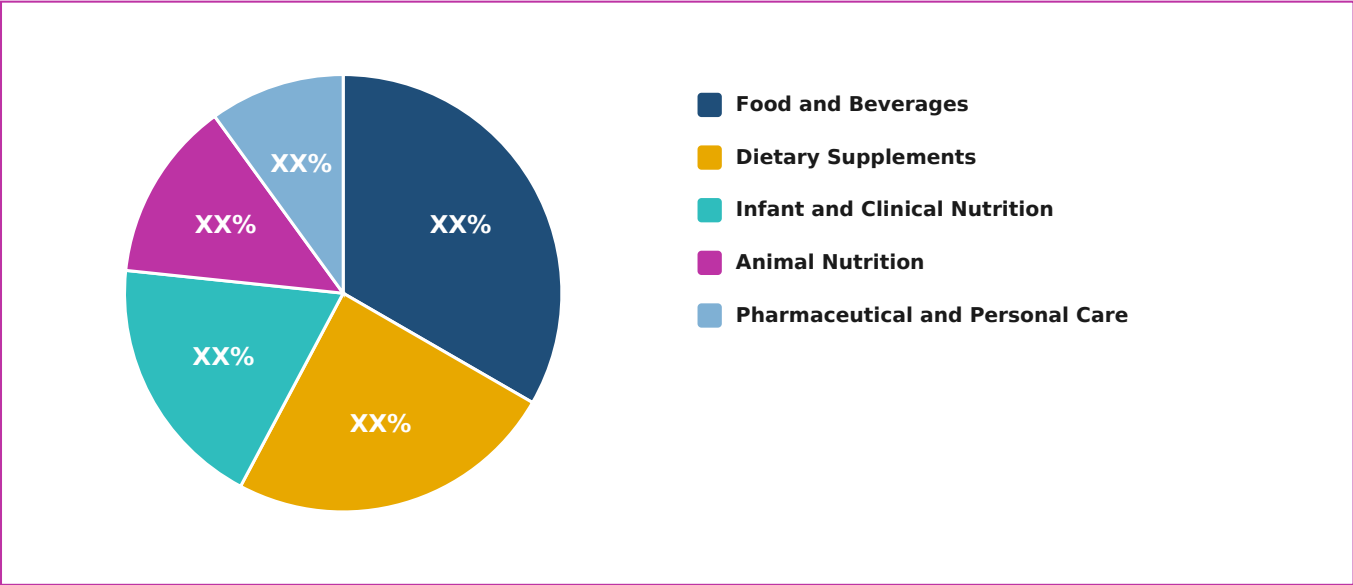
| Segment          | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|------------------|------|------|------|------|------|------|------------|------|
| Powder           | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Liquid and Syrup | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |

Source: XXX

By Application

Food and beverages lead through dairy, bakery, cereals, bars, confectionery and plant-based formulations. Dietary supplements are growing faster as digestive-health powders, gummies and synbiotic products move into mass retail and e-commerce. Infant and clinical nutrition require high documentation and purity, while animal nutrition and personal care remain smaller application pools.

Value share by application, 2025



Source: XXX

Value by application, USD bn

| Segment                          | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|----------------------------------|------|------|------|------|------|------|------------|------|
| Food and Beverages               | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Dietary Supplements              | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Infant and Clinical Nutrition    | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Animal Nutrition                 | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Pharmaceutical and Personal Care | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |

Source: XXX

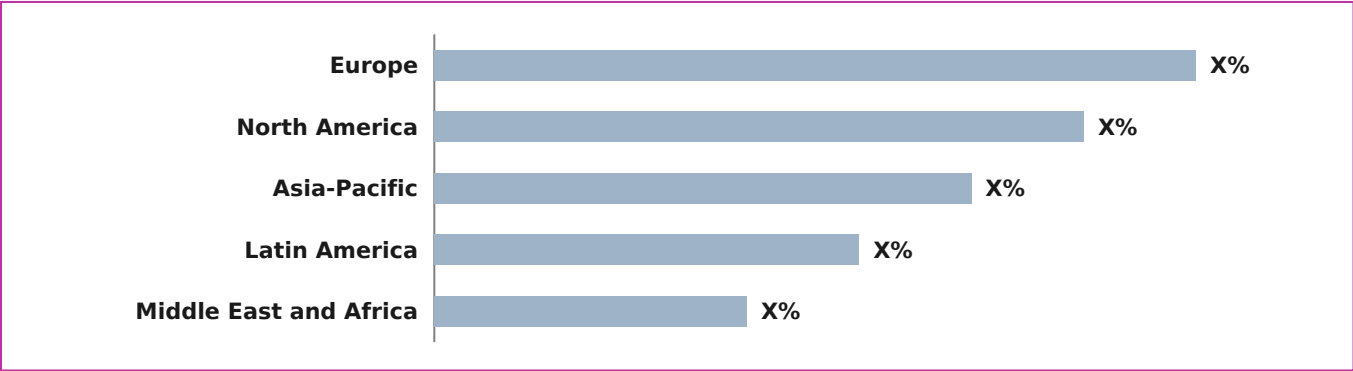
## Inulin Market Regional Analysis and Country Outlook

Europe generated XX% of global inulin revenue in 2025 and remains the industry's production and technical-development center. Belgium, the Netherlands, France and Germany combine contracted chicory acreage with large extraction assets, application laboratories and established food-manufacturing customers. Regional demand is led by fiber-enriched bakery, dairy, supplements and sugar-reduced foods, while the authorized European Union bowel-function claim gives qualifying native chicory inulin a defined regulatory proposition.

North America represented XX% of 2025 value, with the United States accounting for most regional consumption. U.S. Food and Drug Administration treatment of inulin and inulin-type fructans as recognized dietary fibers supports Nutrition Facts declaration, while strong supplement, nutrition-bar, beverage and better-for-you snack markets sustain broad application demand. Canada adds a mature natural-products channel and growing use in dairy alternatives and digestive-health supplements.

Asia-Pacific will grow at a XX% CAGR through 2031, the fastest regional pace. China is scaling fiber-enriched foods and domestic fructan production, Japan provides a sophisticated functional-food market, and India offers rapid growth in nutraceutical powders and urban packaged foods. Thailand's 2025 approval of a prebiotic claim for Orafit Inulin illustrates the region's movement toward more explicit, evidence-based product positioning.

### Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

| Region                 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|------------------------|------|------|------|------|------|------|------------|------|
| Europe                 | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| North America          | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Asia-Pacific           | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Latin America          | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |
| Middle East and Africa | XXX  | XXX  | XXX  | XXX  | XXX  | XXX  | XXX        | XXX  |

Source: XXX

Market value by leading country, USD bn

| Country        | 2025 | 2031 | Share 2025 | CAGR |
|----------------|------|------|------------|------|
| United States  | XXX  | XXX  | XXX        | XXX  |
| Germany        | XXX  | XXX  | XXX        | XXX  |
| United Kingdom | XXX  | XXX  | XXX        | XXX  |
| Belgium        | XXX  | XXX  | XXX        | XXX  |
| Netherlands    | XXX  | XXX  | XXX        | XXX  |
| Japan          | XXX  | XXX  | XXX        | XXX  |
| China          | XXX  | XXX  | XXX        | XXX  |
| Mexico         | XXX  | XXX  | XXX        | XXX  |

Source: XXX

# Inulin Market Competitive Landscape and Company Share

The inulin market has moderate concentration: BENEEO, Sensus, COSUCRA and Cargill anchor global chicory-derived supply, while Chinese, Japanese and specialty natural-ingredient companies broaden regional competition. The leading group benefits from proprietary chicory varieties, grower networks, extraction scale, clinical dossiers and application support. Customer qualification cycles and sensory performance requirements create meaningful barriers even where basic powder specifications appear comparable.

Capacity strategy is shifting from incremental debottlenecking toward supply-chain resilience and lower processing intensity. BENEEO invested EUR XXX in Pemuco, Chile, to increase global chicory-root-fiber capacity by XX%, while COSUCRA's investment plan targets a XX% increase in FIBRULINE supply by 2030. Sensus is strengthening future-proof chicory sourcing and agronomy programs around its Dutch production base.

Competitive differentiation is increasingly built around outcome-led platforms: digestive regularity, prebiotic substantiation, sugar reduction, fat replacement and synbiotic formulation. Acquisitions are less prominent than internal capacity, agronomy and application development because the scarce assets are qualified root supply, extraction know-how and customer-approved grades. Partnerships with distributors and local regulatory specialists are especially important in Japan, Southeast Asia and emerging nutraceutical markets.

## Leading companies

| Company                                        | HQ  | Est. revenue 2025 | Market share 2025 | YoY |
|------------------------------------------------|-----|-------------------|-------------------|-----|
| BENEEO GmbH                                    | XXX | XXX               | XXX               | XXX |
| Sensus B.V.                                    | XXX | XXX               | XXX               | XXX |
| COSUCRA Groupe Warcoing SA                     | XXX | XXX               | XXX               | XXX |
| Cargill, Incorporated                          | XXX | XXX               | XXX               | XXX |
| Ingredion Incorporated                         | XXX | XXX               | XXX               | XXX |
| The Tierra Group                               | XXX | XXX               | XXX               | XXX |
| Ciranda, Inc.                                  | XXX | XXX               | XXX               | XXX |
| Fuji Nihon Seito Corporation                   | XXX | XXX               | XXX               | XXX |
| Baolingbao Biology Co., Ltd.                   | XXX | XXX               | XXX               | XXX |
| Shandong Bailong Chuangyuan Bio-Tech Co., Ltd. | XXX | XXX               | XXX               | XXX |

Source: XXX

# Global Inulin Market Forecast and Commercial Opportunities

Global inulin revenue will rise from USD XXX billion in 2025 to USD XXX billion in 2031. Volume expansion will remain strongest in mainstream fiber fortification, but price and mix gains will come from high-performance, organic, low-sugar and clinically positioned grades. Asia-Pacific will capture an increasing share of incremental demand while Europe remains the core production and innovation hub.

The central forecast assumes stable chicory acreage, normalized energy costs and continued permission to declare qualifying inulin as dietary fiber in major markets. An upside path emerges if explicit prebiotic claims expand across Asian markets and GLP-1-oriented nutrition accelerates demand for fiber-dense foods. Crop disruption, aggressive substitution by resistant dextrins or restrictions on health communications define the principal downside risks.

Winning suppliers will combine multi-origin raw-material security, lower-energy extraction, application-specific chain-length control and regulatory evidence. Customers will favor partners that can reformulate entire systems rather than supply a generic fiber, particularly in reduced-sugar bakery, dairy alternatives, beverages and specialized nutrition.

## Opportunities

- Prebiotic beverages and hydration powders with low-viscosity inulin grades
- GLP-1-era nutrition products emphasizing fiber density and digestive regularity
- Sugar-reduced bakery, confectionery and dairy formulations requiring bulk replacement
- Synbiotic combinations pairing inulin with clinically characterized probiotic strains
- Infant, maternal and healthy-aging nutrition with tailored chain-length profiles
- Locally sourced agave and Jerusalem-artichoke inulin for differentiated regional supply chains

This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.