

Global Monk Fruit Extract Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



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

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Indicator	Value
Market size (2025)	USD 285 m
Forecast (2031)	USD 472 m
CAGR (2021-2031)	8.8%
Study period	2021-2031
Largest region	North America · 39.2%
Fastest-growing region	Europe · 11.4%
Market concentration	Moderate
Licence	Individual / Company

The global monk fruit extract market reached USD XXX million in 2025 and will advance to USD XXX million by 2031, expanding at an XX% CAGR. Beverage reformulation, clean-label sugar reduction and the commercial adoption of blended sweetening systems are moving monk fruit from specialist tabletop products into mainstream food and beverage formulations. North America held XX% of 2025 revenue, while Europe will record the fastest regional CAGR at XX% as regulatory pathways broaden for monk fruit decoctions and concentrated extracts. Supply remains anchored in southern China, making agronomy, extraction yield, inventory strategy and supplier qualification central to competitive advantage.

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Table of contents

1 Introduction

1.1 Study Scope and Objectives

1.2 Market Definition

1.3 Inclusions, Exclusions and Currency Basis

2 Research Methodology

2.1 Secondary Research Programme

2.2 Primary Interview Programme

2.3 Bottom-Up Market Sizing

2.4 Forecast Model and Scenario Analysis

2.5 Data Triangulation and Quality Control

3 Executive Summary

3.1 Market Size and Forecast

3.2 Segment and Regional Leaders

3.3 Strategic Takeaways

4 Monk Fruit Extract Industry Overview

4.1 Value Chain from Cultivation to Formulation

4.2 Extraction, Purification and Standardization

4.3 Pricing and Cost Structure

4.4 Regulatory Landscape

5 Global Monk Fruit Extract Market Trends and Growth Drivers

5.1 Sugar-Reduction and Clean-Label Demand

5.2 Zero-Sugar Beverage Adoption

5.3 Agronomy and Extraction Innovation

5.4 Market Restraints and Supply Risks

5.5 Porter's Five Forces Analysis

6 Global Monk Fruit Extract Market Size and Forecast

6.1 Historical Market Value and Volume, 2021-2025

6.2 Base-Case Forecast, 2026-2031

6.3 Accelerated and Constrained-Supply Scenarios

7 Market Size and Forecast by Product Format

7.1 Standardized High-Intensity Extract

7.2 Formulated Monk Fruit Blends

7.3 Juice Concentrate and Juice Powder

8 Market Size and Forecast by Physical Form and Concentration

8.1 Powder

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8.2 Liquid
8.3 Below 30% Mogroside V
8.4 30% to 50% Mogroside V
8.5 Above 50% Mogroside V
9 Market Size and Forecast by Application
9.1 Beverages
9.2 Tabletop Sweeteners
9.3 Bakery and Confectionery
9.4 Sports Nutrition and Dietary Supplements
9.5 Dairy and Frozen Desserts
9.6 Other Food Applications
10 Monk Fruit Extract Market Regional Analysis
10.1 North America
10.1.1 United States
10.1.2 Canada
10.1.3 Mexico
10.2 Europe
10.2.1 United Kingdom
10.2.2 Germany
10.2.3 France
10.2.4 Netherlands
10.2.5 Italy
10.2.6 Spain
10.2.7 Rest of Europe
10.3 Asia-Pacific
10.3.1 China
10.3.2 Japan
10.3.3 Australia
10.3.4 South Korea
10.3.5 India
10.3.6 Rest of Asia-Pacific
10.4 Latin America
10.4.1 Brazil
10.4.2 Argentina
10.4.3 Chile
10.4.4 Rest of Latin America
10.5 Middle East and Africa
10.5.1 Gulf Cooperation Council

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10.5.2 South Africa
10.5.3 Israel
10.5.4 Rest of Middle East and Africa

11 Monk Fruit Extract Market Competitive Landscape

11.1 Market Concentration and Company Share
11.2 Competitive Benchmarking
11.3 Mergers, Partnerships and Capacity Investments
11.4 Company Profiles
11.4.1 Guilin Layn Natural Ingredients Corp.
11.4.2 Monk Fruit Corp.
11.4.3 Hunan Huacheng Biotech, Inc.
11.4.4 Guilin GFS Monk Fruit Corporation
11.4.5 Hunan NutraMax Inc.
11.4.6 Tate & Lyle PLC
11.4.7 Archer Daniels Midland Company
11.4.8 Döhler GmbH
11.4.9 GLG Life Tech Corporation
11.4.10 Saraya Co., Ltd. / Lakanto

12 Market Opportunities and Strategic Outlook

12.1 Application White Spaces
12.2 European Market-Entry Opportunities
12.3 Supply-Chain and Product Innovation Priorities

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List of tables

Table 1. Global Monk Fruit Extract Market Snapshot, 2021-2031

Table 2. Executive Ranking of Segments by 2025 Share and Forecast CAGR

Table 3. Global Market Value by Year, 2021-2031

Table 4. Global Standardized Extract Volume by Year, 2021-2031

Table 5. Market Value and CAGR by Product Format, 2021-2031

Table 6. Forecast Scenario Assumptions and Revenue Outcomes, 2026-2031

Table 7. Detailed Market Driver Impact Assessment

Table 8. Detailed Market Restraint and Risk Assessment

Table 9. Market Value and Volume by Product Format, 2021-2031

Table 10. Market Value and Volume by Physical Form, 2021-2031

Table 11. Market Value by Mogroside V Concentration, 2021-2031

Table 12. Product Format Pricing and Typical Application Matrix

Table 13. Beverage Market Value and Volume by Sub-Application, 2021-2031

Table 14. Tabletop Sweetener Market Value and Volume, 2021-2031

Table 15. Bakery and Confectionery Market Value and Volume, 2021-2031

Table 16. Sports Nutrition and Dietary Supplement Market Value and Volume, 2021-2031

Table 17. Dairy, Frozen Dessert and Other Food Market Value, 2021-2031

Table 18. Market Value by Customer Type, 2021-2031

Table 19. Market Value by Direct, Distributor and Online Sales Channel, 2021-2031

Table 20. Customer Procurement Criteria and Supplier Qualification Requirements

Table 21. North America Market Value by Country, 2021-2031

Table 22. Europe Market Value by Country, 2021-2031

Table 23. Asia-Pacific Market Value by Country, 2021-2031

Table 24. Latin America Market Value by Country, 2021-2031

Table 25. Middle East and Africa Market Value by Country, 2021-2031

Table 26. Regional Regulatory Status, Permitted Uses and Commercial Readiness

Table 27. Competitive Benchmark of Leading Monk Fruit Extract Suppliers

Table 28. Mergers, Partnerships, Capacity Investments and Product Launches, 2021-2026

Table 29. Guilin Layn Natural Ingredients Corp. Company Profile

Table 30. Monk Fruit Corp. Company Profile

Table 31. Hunan Huacheng Biotech, Inc. Company Profile

Table 32. Guilin GFS Monk Fruit Corporation Company Profile

Table 33. Hunan NutraMax Inc. Company Profile

Table 34. Tate & Lyle PLC Company Profile

Table 35. Archer Daniels Midland Company Company Profile

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Table 36. Döhler GmbH Company Profile

Table 37. GLG Life Tech Corporation Company Profile

Table 38. Saraya Co., Ltd. / Lakanto Company Profile

Table 39. Opportunity Ranking by Addressable Revenue, Margin and Time to Scale

Table 40. European Market-Entry Priorities by Country and Application

Table 41. Strategic Actions for Producers, Distributors and Food Manufacturers

Table 42. Market Sizing Variables, Definitions and Conversion Factors

Table 43. Primary Interview Sample by Company Tier, Seniority and Region

Table 44. Market value by year, USD bn

Table 45. Year-over-year value change

Table 46. Drivers — impact on forecast

Table 47. Restraints — impact on forecast

Table 48. Value by product Format, USD bn

Table 49. Value by physical Form, USD bn

Table 50. Value by mogroside V Concentration, USD bn

Table 51. Value by application, USD bn

Table 52. Value by customer Type, USD bn

Table 53. Market value by region, USD bn

Table 54. Market value by leading country, USD bn

Table 55. Leading companies

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List of figures

Figure 1. Global Monk Fruit Extract Market Revenue, 2021-2031

Figure 2. Monk Fruit Extract Market Opportunity by Region, 2025-2031

Figure 3. Monk Fruit Extract Revenue and Volume Trend, 2021-2031

Figure 4. Average Realized Price Index by Product Format, 2021-2031

Figure 5. 2031 Revenue Forecast by Scenario

Figure 6. Driver and Restraint Impact on Market CAGR

Figure 7. Impact Versus Time Horizon Matrix

Figure 8. 2025 Market Share by Product Format

Figure 9. Forecast CAGR by Mogroside V Concentration

Figure 10. 2025 Monk Fruit Extract Market Share by Application

Figure 11. Application Revenue Growth, 2025-2031

Figure 12. 2025 Revenue Share by Customer Type and Sales Route

Figure 13. 2025 Global Monk Fruit Extract Revenue Share by Region

Figure 14. Regional CAGR Comparison, 2025-2031

Figure 15. Country Revenue Ranking, 2025 and 2031

Figure 16. Estimated Global Monk Fruit Extract Company Share, 2025

Figure 17. Competitive Positioning by Upstream Control and Application Capability

Figure 18. Incremental Revenue Opportunity by Application, 2025-2031

Figure 19. Opportunity Attractiveness by Growth and Competitive Intensity

Figure 20. Value share by product Format, 2025

Figure 21. Value share by application, 2025

Figure 22. Growth rate by region, 2025-2031

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Executive summary

The global monk fruit extract market reached USD XXX million in 2025 and will advance to USD XXX million by 2031, expanding at an XX% CAGR. Beverage reformulation, clean-label sugar reduction and the commercial adoption of blended sweetening systems are moving monk fruit from specialist tabletop products into mainstream food and beverage formulations. North America held XX% of 2025 revenue, while Europe will record the fastest regional CAGR at XX% as regulatory pathways broaden for monk fruit decoctions and concentrated extracts. Supply remains anchored in southern China, making agronomy, extraction yield, inventory strategy and supplier qualification central to competitive advantage.

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

Key findings

- Global monk fruit extract revenue reached USD XXX million in 2025 and will rise to USD XXX million by 2031.
- The market will expand at an XX% CAGR between 2025 and 2031, adding USD XXX million in annual revenue.
- North America generated XX% of global revenue in 2025, equivalent to USD XXX million.
- Europe will grow at an XX% CAGR through 2031 following the 2024 determinations that non-selective aqueous monk fruit decoctions are not novel foods in Great Britain and the European Union.
- Standardized high-intensity extracts represented XX% of 2025 market value, supported by their low dosage and compatibility with stevia, erythritol and allulose.
- Beverages accounted for XX% of demand in 2025 and will remain the largest application through 2031.
- Powder ingredients held XX% of revenue because of their shelf stability, shipping economics and suitability for dry blends.
- Layn Natural Ingredients reports that more than XX% of global monk fruit production originates in the greater Guilin area, concentrating agricultural and processing risk.

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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

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Global Monk Fruit Extract Market Trends and Growth Drivers

Monk fruit extract sits at the intersection of three durable changes in food economics: pressure to reduce added sugar, demand for plant-derived labels and the move from single sweeteners to engineered sweetening systems. The ingredient's high potency makes it especially attractive in beverages, where sugar's bulk is less critical than in bakery or confectionery. Its commercial role is therefore expanding fastest in formulations where taste optimization, not physical sugar replacement, is the primary technical challenge.

Supply economics remain distinctive. Monk fruit cultivation and primary processing are concentrated around Guilin, and the finished ingredient's economics depend on fruit quality, mogroside yield, contracted acreage, extraction recovery and purification intensity. Leading suppliers are using breeding, tissue culture, dual-harvest methods and cold storage to convert agronomic control into consistency and margin.

Regulatory geography will shape the next phase of competition. North America offers the most established market, Asia-Pacific supplies the industry and Europe is entering a market-development cycle following its 2024 non-novel determinations and the 2025 acceptance of a concentrated-extract application by EFSA. Suppliers able to match ingredient specifications, technological functions and claims to each jurisdiction will capture a disproportionate share of new multinational programs.

Growth drivers

Sugar-reduction mandates accelerate reformulation

Nutrition labelling, sugar taxes and corporate nutrition commitments are pushing manufacturers to remove added sugar without sacrificing sweetness intensity. Monk fruit gains where formulators require a plant-derived ingredient that works at low dosage and supports zero- or reduced-sugar positioning, particularly in beverages and nutrition products.

Clean-label sweetening moves mainstream

Brands are replacing artificial sweeteners or reducing their prominence in ingredient statements as consumers scrutinize product labels. Monk fruit benefits from its fruit origin and compatibility with stevia, allulose and polyols, allowing developers to construct cleaner-tasting systems while retaining a recognizable ingredient narrative.

Zero-sugar beverages scale commercial demand

Energy drinks, hydration products, functional waters and powdered beverages offer the highest-throughput route for monk fruit adoption. The January 2025 nationwide US launch of Red Bull Zero with monk fruit extract demonstrates that the ingredient can enter globally recognized beverage platforms rather than remaining confined to natural-channel brands.

Higher-yield cultivars improve economics

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Breeding, tissue culture, dual-harvest agronomy and improved fruit storage raise recoverable mogroside output and extend processing campaigns. Layn reports increasing mogroside V content in fruit from XX% to XX%, a productivity shift that supports more stable unit costs and capacity expansion.

Blended systems solve taste and texture gaps

Monk fruit increasingly functions as one component in optimized sweetening systems rather than as a complete one-for-one sugar replacement. Combining it with allulose, erythritol, soluble fiber or stevia improves bulk, mouthfeel, sweetness onset and cost-in-use, expanding addressable applications in bakery, dairy and tabletop products.

European regulatory access widens

Great Britain and the European Union determined in 2024 that specified non-selective aqueous monk fruit decoctions are not novel foods, while EFSA accepted a new monk fruit extract food-additive application for assessment in 2025. These developments unlock formulation programs and supplier investment across a region previously constrained by regulatory uncertainty.

Restraints

Guilin-centered supply creates crop risk

Commercial fruit supply is overwhelmingly concentrated in and around Guilin, exposing global buyers to localized weather, disease, labor and logistics disruptions. Manufacturers must carry inventory, contract acreage and qualify multiple processors, increasing working-capital requirements and limiting rapid volume expansion.

Cost-in-use limits mass-market penetration

Monk fruit extract remains more expensive than mature artificial sweeteners and many stevia systems on an ingredient-cost basis. Premium positioning and low dosage offset the gap in selected applications, but cost-sensitive mainstream foods require blend optimization before conversion is commercially viable.

Sensory performance constrains dosage

At elevated sweetness replacement levels, monk fruit can produce lingering sweetness, flavor interactions or an identifiable profile that differs from sucrose. This raises development time and encourages the use of masking flavors, acids and complementary sweeteners, especially in neutral dairy and delicate beverage bases.

Regulatory fragmentation slows launches

Permitted uses, ingredient classifications and labelling treatment differ materially among the United States, Canada, Europe and other markets. Multinational brands must adapt specifications and claims by jurisdiction, reducing the efficiency of global recipes and delaying launch synchronization.

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Monk Fruit Extract Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Sugar-reduction mandates accelerate reformulation	XXX	XXX	XXX
Clean-label sweetening moves mainstream	XXX	XXX	XXX
Zero-sugar beverages scale commercial demand	XXX	XXX	XXX
Higher-yield cultivars improve economics	XXX	XXX	XXX
Blended systems solve taste and texture gaps	XXX	XXX	XXX
European regulatory access widens	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Guilin-centered supply creates crop risk	XXX	XXX	XXX
Cost-in-use limits mass-market penetration	XXX	XXX	XXX
Sensory performance constrains dosage	XXX	XXX	XXX
Regulatory fragmentation slows launches	XXX	XXX	XXX

Source: XXX

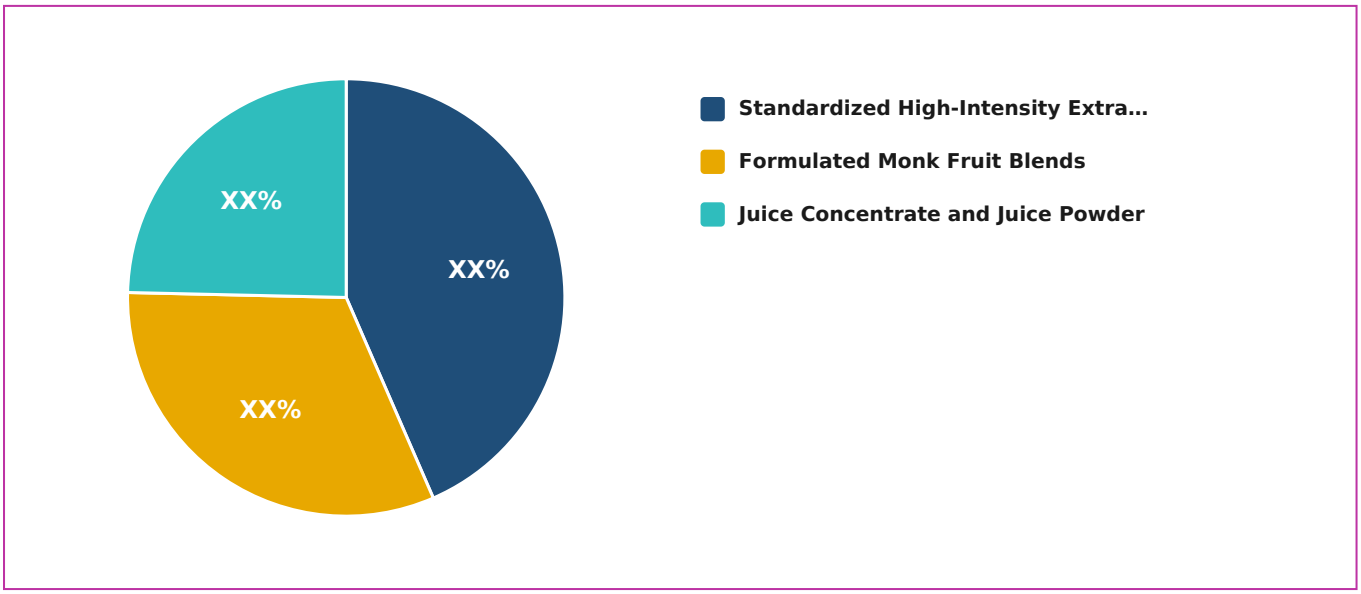
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Monk Fruit Extract Market Segmentation by Format, Form and Application

By Product Format

Standardized extracts dominate because concentrated mogrosides deliver high sweetness at low inclusion rates and integrate readily into industrial sweetener systems. Formulated monk fruit blends are the fastest-growing format as customers seek turnkey bulk, texture and sweetness solutions. Juice concentrate and juice powder retain a differentiated role in partial sugar reduction and formulations seeking juice-based ingredient labelling.

Value share by product Format, 2025



Source: XXX

Value by product Format, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Standardized High-Intensity Extract	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Formulated Monk Fruit Blends	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Juice Concentrate and Juice Powder	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Physical Form

Powder is favored for international freight, warehouse stability, dry blending and precise standardization across food, tabletop and nutrition applications. Liquid extracts and concentrates gain share in beverage plants and flavor houses because they simplify dissolution and metering. The liquid segment's expansion

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will be strongest in ready-to-drink beverages and concentrated flavor systems.

Value by physical Form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Powder	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Liquid	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Mogroside V Concentration

The XX% to XX% range offers the broadest balance of sweetness intensity, flavor quality and cost for industrial formulations. Extracts above XX% grow fastest in premium beverages and precision blends where low dosage and reduced non-sweet solids are valuable. Lower-concentration extracts, juice powders and concentrates serve partial-reduction, flavor-modification and cost-sensitive applications.

Value by mogroside V Concentration, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Below 30% Mogroside V	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
30% to 50% Mogroside V	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Above 50% Mogroside V	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

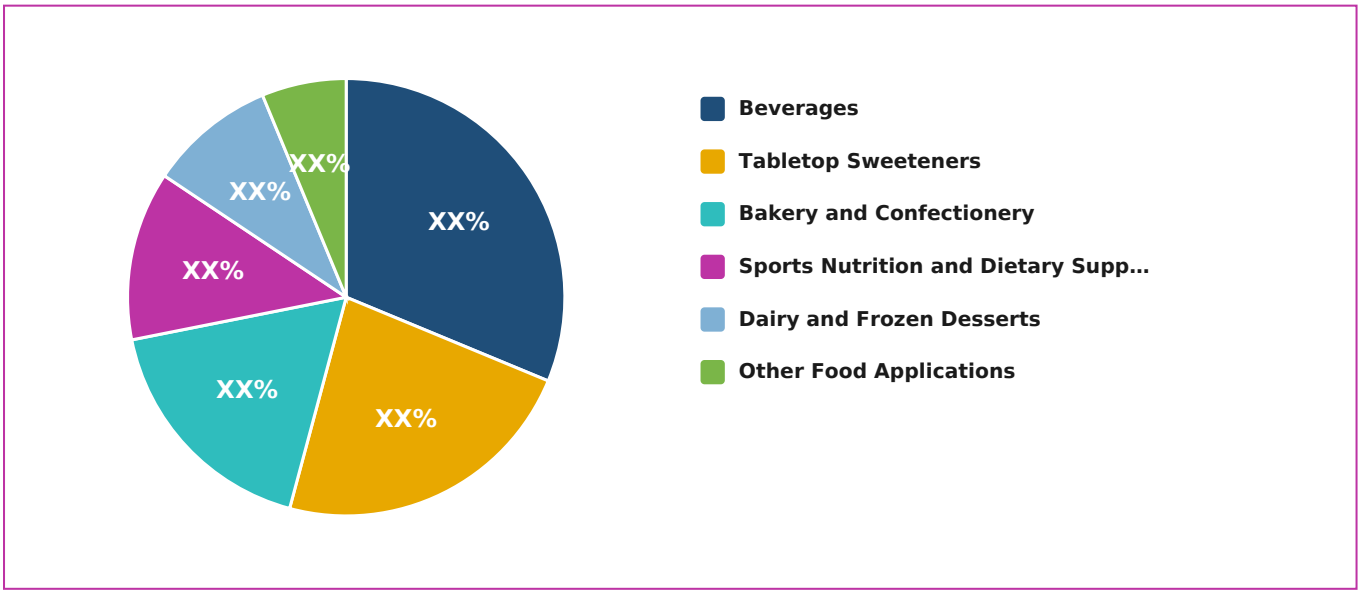
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By Application

Beverages lead because liquid systems can accommodate high-intensity sweeteners without replacing all of sugar's structural functions. Tabletop sweeteners remain a substantial established outlet, while sports nutrition and dietary supplements expand through powders, protein products and metabolic-health positioning. Bakery and dairy growth depends on blends that replace sugar's bulk, browning, freezing-point and mouthfeel functions.

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Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Beverages	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Tabletop Sweeteners	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bakery and Confectionery	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sports Nutrition and Dietary Supplements	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Dairy and Frozen Desserts	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Food Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Customer Type

Industrial customers dominate through direct purchases by food manufacturers, beverage companies, flavor houses and contract formulators. Consumer retail products command higher per-kilogram value but often contain carriers such as erythritol or allulose, limiting the extract content of the finished pack. Industrial demand will strengthen as multinational brands adopt monk fruit in repeatable, multi-market platforms.

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Value by customer Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Industrial and Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Consumer Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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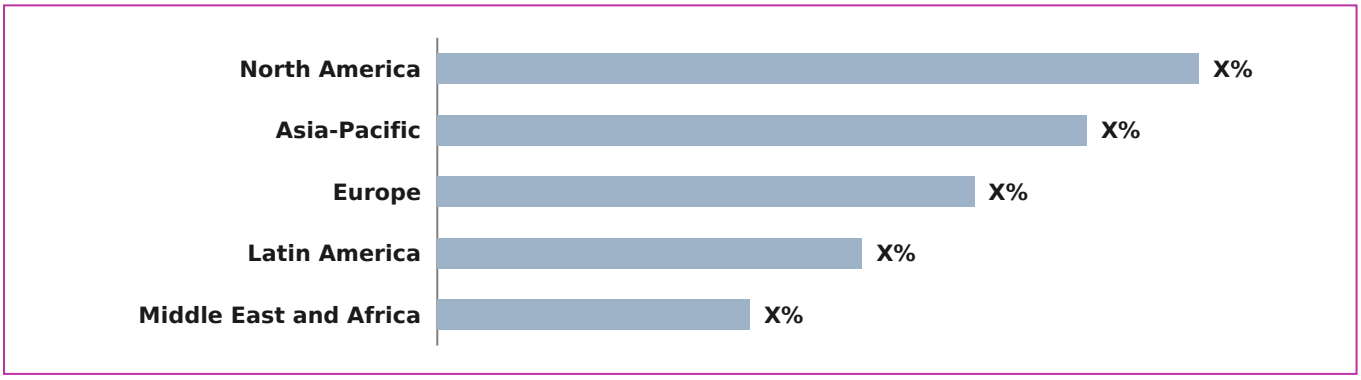
Monk Fruit Extract Market Regional Analysis and Country Outlook

North America led the market with XX% of global revenue in 2025. The United States combines broad FDA GRAS use pathways, a developed natural-products channel and a large base of beverage, sports-nutrition and tabletop-sweetener brands. Adoption is moving beyond specialty retail as national beverage launches validate monk fruit in high-volume formulations, while Canada remains more use-specific because Health Canada's permitted sweetener list imposes category-level conditions.

Asia-Pacific accounted for XX% of 2025 revenue and controls the market's agricultural and primary-processing base. China is the essential production center, with orchards and extractors clustered around Guilin; Japan provides a mature consumer market for monk fruit sweetening concepts; and Australia and New Zealand offer established food-additive access. Regional growth will be supported by local branded sweeteners, reduced-sugar beverages and higher-value exports of standardized extracts.

Europe represented XX% of 2025 revenue but will post the fastest CAGR, at XX%, through 2031. The 2024 non-novel determinations for specified aqueous decoctions in Great Britain and the EU created a practical route for new products, while EFSA's 2025 acceptance of a monk fruit extract food-additive application signals a broader future addressable market. Germany, the United Kingdom, France and the Netherlands will lead early commercialization through natural foods, sports nutrition, flavor systems and reduced-sugar beverages.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	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

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Monk Fruit Extract Market Competitive Landscape and Company Share

The monk fruit extract market is moderately concentrated. Layn Natural Ingredients, Monk Fruit Corp and Hunan Huacheng Biotech combine agronomic access with extraction expertise, while Tate & Lyle, ADM, Döhler and specialist distributors extend the ingredient into global formulation networks. Competitive share depends on contracted fruit, standardized mogroside content, sensory consistency, regulatory documentation and the ability to support customer trials.

Upstream control is more concentrated than downstream sales. Leading producers invest in cultivar selection, tissue culture, farmer training, cold storage and multi-year contracting to protect availability and reduce crop-price volatility. At the customer interface, differentiation is shifting toward complete sugar-reduction systems containing monk fruit alongside stevia, allulose, erythritol, fibers, texturants and flavor modifiers.

Strategic consolidation among specialty-ingredient suppliers will strengthen cross-selling and application development. Tate & Lyle completed its CP Kelco acquisition in November 2024, adding mouthfeel technologies that complement sweetening systems, and Ingredion announced a recommended USD XXX billion acquisition of Tate & Lyle in June 2026. These transactions increase the importance of integrated formulation capabilities even where monk fruit extraction itself remains supplied by specialist partners.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Guilin Layn Natural Ingredients Corp.	XXX	XXX	XXX	XXX
Monk Fruit Corp.	XXX	XXX	XXX	XXX
Hunan Huacheng Biotech, Inc.	XXX	XXX	XXX	XXX
Guilin GFS Monk Fruit Corporation	XXX	XXX	XXX	XXX
Hunan NutraMax Inc.	XXX	XXX	XXX	XXX
Tate & Lyle PLC	XXX	XXX	XXX	XXX
Archer Daniels Midland Company	XXX	XXX	XXX	XXX
Döhler GmbH	XXX	XXX	XXX	XXX
GLG Life Tech Corporation	XXX	XXX	XXX	XXX
Saraya Co., Ltd. / Lakanto	XXX	XXX	XXX	XXX

Source: XXX

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Monk Fruit Extract Market Forecast and Commercial Opportunities

The market will add USD XXX million between 2025 and 2031, with growth led by beverages, formulated blends and European market development. Powder will remain the dominant physical form, but liquid concentrates will gain in ready-to-drink applications where rapid dissolution, dosing accuracy and reduced dust are valued.

The base-case forecast assumes continued orchard productivity improvements, orderly regulatory progress in Europe and sustained reformulation of beverages and nutrition products. An accelerated scenario reaches USD XXX million by 2031 if European additive authorization broadens rapidly and large beverage platforms adopt monk fruit across multiple markets; a constrained-supply scenario limits the market to USD XXX million if crop costs and regulatory delays suppress conversion.

Winning suppliers will combine secure agricultural programs with application laboratories and local regulatory support. The strongest margins will accrue to standardized, sensory-optimized systems rather than commodity extracts, while traceability, pesticide control, solvent management and batch-level mogroside analytics will increasingly determine qualification with multinational customers.

Opportunities

- Monk fruit and allulose systems for bakery, dairy and tabletop applications
- Low-mogroside juice concentrates positioned for natural flavor and partial sugar reduction
- European beverage and nutrition launches enabled by clearer regulatory pathways
- Premium organic, traceable and pesticide-controlled supply programs
- Cultivar development and dual-harvest systems that improve mogroside output per hectare
- Application-specific blends for protein nutrition, children's products and medical nutrition

> 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.

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