

Global Sorbitol 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 1.9 bn
Forecast (2031)	USD 2.7 bn
CAGR (2021-2031)	5.8%
Study period	2021-2031
Largest region	Asia-Pacific · 44.5%
Fastest-growing region	Asia-Pacific · 6.7%
Market concentration	Moderate
Licence	Individual / Company

The global sorbitol market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Demand is anchored by oral-care humectants, reduced-sugar food formulations, pharmaceutical excipients and sorbitol-derived surfactants. Asia-Pacific accounts for XX% of global revenue and combines the largest consumption base with the fastest regional growth. Liquid sorbitol remains the principal commercial form, while pharmaceutical-grade powder and specialty industrial derivatives generate the strongest value uplift.

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Executive summary

The global sorbitol market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Demand is anchored by oral-care humectants, reduced-sugar food formulations, pharmaceutical excipients and sorbitol-derived surfactants. Asia-Pacific accounts for XX% of global revenue and combines the largest consumption base with the fastest regional growth. Liquid sorbitol remains the principal commercial form, while pharmaceutical-grade powder and specialty industrial derivatives generate the strongest value uplift.

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

Key findings

- Global sorbitol revenue reached USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Asia-Pacific generated XX% of 2025 market value and will expand at a XX% CAGR through 2031.
- Liquid sorbitol represented XX% of 2025 revenue because high-volume oral-care, food and chemical-processing users favor pumpable XX% solutions.
- Food and beverages accounted for XX% of market value, followed by oral and personal care at XX%.
- Corn-derived sorbitol represented XX% of global value, while cassava-based supply is growing fastest at a XX% CAGR.
- The United Nations Statistics Division classifies D-glucitol under HS 290544, providing a consistent basis for international trade analysis.
- US food labeling rules require a laxative-effect statement when reasonably foreseeable consumption may result in daily ingestion of 50 grams of sorbitol.
- Gulshan Polyols disclosed XXX metric tonnes per year of sorbitol capacity in its 2023/24 annual report.

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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 Sorbitol Market Trends and Growth Drivers

Sorbitol occupies a defensible position between commodity carbohydrate sweeteners and functional specialty ingredients. Its economics begin with glucose and hydrogen, but customer value is created through humectancy, controlled crystallization, compressibility, mouthfeel and compatibility with active ingredients. This combination produces a broader demand base than sweetness alone.

The market's largest volume streams remain liquid and logistics-intensive. Tank distance, solids concentration, microbial control and continuity of supply strongly influence purchasing decisions, giving integrated regional producers an advantage. Powder grades travel farther and support higher-value pharmaceutical, nutraceutical and confectionery applications.

Through 2031, mix will matter more than headline capacity. Producers that qualify pharmacopeial grades, tailor particle properties, document renewable feedstocks and support downstream formulation will outperform suppliers competing solely on standard XX% solution pricing.

Growth drivers

Sugar reduction without loss of bulk

Sorbitol replaces part of the sucrose system while preserving solids, moisture and texture in confectionery, bakery, fruit preparations and frozen desserts. Its value is strongest where high-intensity sweeteners cannot reproduce the mass, cooling effect or water activity required by the finished formulation.

Oral-care consumption and premiumization

Toothpaste and mouthwash manufacturers use liquid sorbitol as a humectant, bodying agent and non-cariogenic sweetener. Higher penetration of branded oral care in India, Southeast Asia, Africa and Latin America increases dependable, specification-driven demand for non-crystallizing grades.

Pharmaceutical excipient upgrading

Sorbitol supports taste masking, tablet compression, syrup body, gelatin plasticization and API compatibility across prescription, consumer-health and nutraceutical products. Growth is concentrated in pharmacopeial powder grades and tightly controlled liquids, allowing qualified suppliers to capture a premium over commodity food grades.

Downstream bio-based chemistry

Sorbitol is an intermediate for sorbitan esters, polysorbates, vitamin C routes, alkyd resins and isosorbide. Brand-owner interest in renewable carbon and recyclable high-performance polymers expands the addressable market beyond traditional sweetener applications.

Asian starch-processing investment

Integrated corn and cassava processors in China, India and Southeast Asia are improving conversion yields and building flexible starch-sweetener platforms. Local availability lowers delivered cost for regional

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toothpaste, food and pharmaceutical manufacturers and accelerates substitution of imported material.

Convenience-food moisture management

Longer distribution chains increase the value of humectants that preserve softness and control crystallization in bars, bakery products, gummies and fillings. Sorbitol's combined water-binding and texturizing functions support repeat use even where sweetness is supplied by another ingredient.

Restraints

Gastrointestinal tolerance limits

High polyol intake can cause gastrointestinal discomfort, constraining inclusion levels in consumer foods and requiring careful portion design. Label statements associated with laxative effects can also reduce consumer acceptance in products positioned for frequent consumption.

Feedstock and utility volatility

Sorbitol economics are exposed to corn, cassava starch, dextrose, hydrogen, steam and electricity costs. Producers without upstream integration or efficient cogeneration experience rapid margin compression when contract prices lag input inflation.

Substitution by glycerin and competing polyols

Glycerin competes directly in humectant systems, while maltitol, erythritol, xylitol and allulose compete in sugar-reduction formulations. Sorbitol retains a cost and functionality advantage in many applications, but reformulation can cap pricing power when competing ingredients become temporarily oversupplied.

Commodity capacity and import pressure

New Asian capacity and fluctuating freight rates periodically create aggressive export offers for standard liquid grades. This reduces utilization and margins for higher-cost plants in import-exposed markets and encourages producers to shift toward pharmaceutical and customized grades.

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Sorbitol Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Sugar reduction without loss of bulk	XXX	XXX	XXX
Oral-care consumption and premiumization	XXX	XXX	XXX
Pharmaceutical excipient upgrading	XXX	XXX	XXX
Downstream bio-based chemistry	XXX	XXX	XXX
Asian starch-processing investment	XXX	XXX	XXX
Convenience-food moisture management	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Gastrointestinal tolerance limits	XXX	XXX	XXX
Feedstock and utility volatility	XXX	XXX	XXX
Substitution by glycerin and competing polyols	XXX	XXX	XXX
Commodity capacity and import pressure	XXX	XXX	XXX

Source: XXX

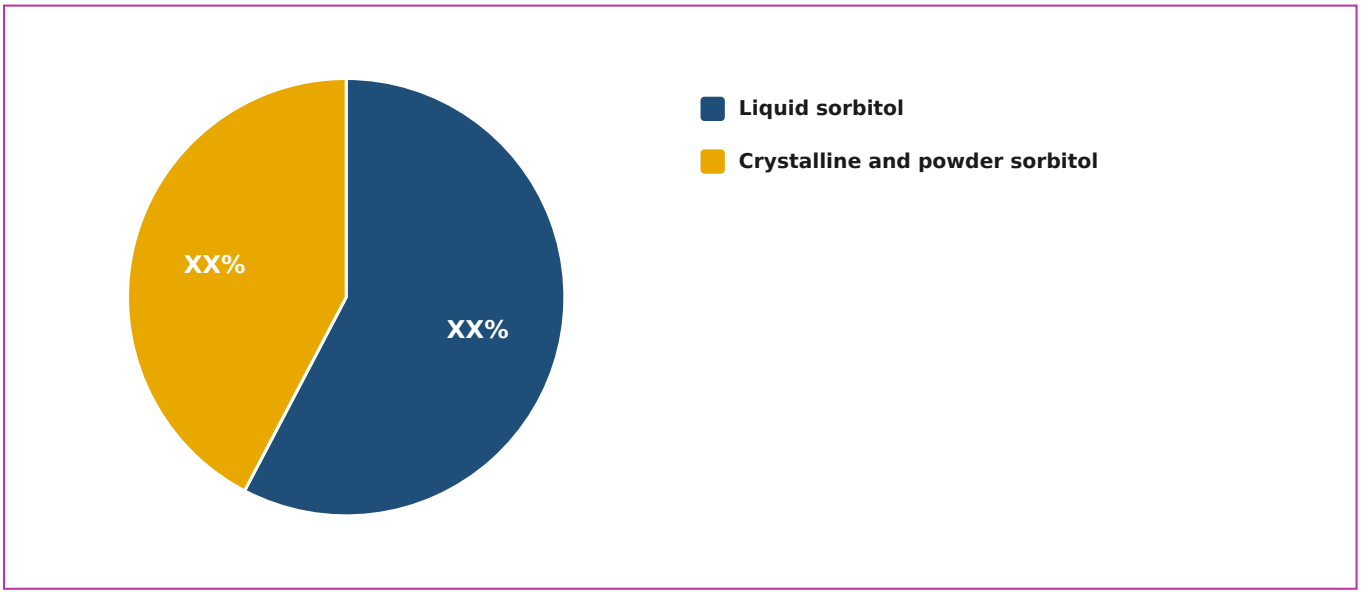
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Sorbitol Market Segmentation by Form, Grade, Application, Function and Feedstock

By Form

Liquid XX% solutions dominate toothpaste, mouthwash, food, surfactant and industrial systems because they can be pumped, blended and transported in bulk. Crystalline and powder sorbitol command higher unit prices in tablets, sachets, confectionery and applications requiring low water content. Growth in direct-compression pharmaceuticals is shifting incremental value toward engineered powder grades.

Value share by form, 2025



Source: XXX

Value by form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Liquid sorbitol	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Crystalline and powder sorbitol	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Grade

Food grade leads through confectionery, bakery, frozen foods and beverage applications, with pricing determined largely by purity and delivered format. Pharmaceutical grade benefits from oral liquids, tablets, lozenges and nutraceuticals and carries the most demanding qualification burden. Personal-care and industrial grades remain significant because oral-care humectants and chemical conversion consume large volumes.

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Value by grade, USD bn

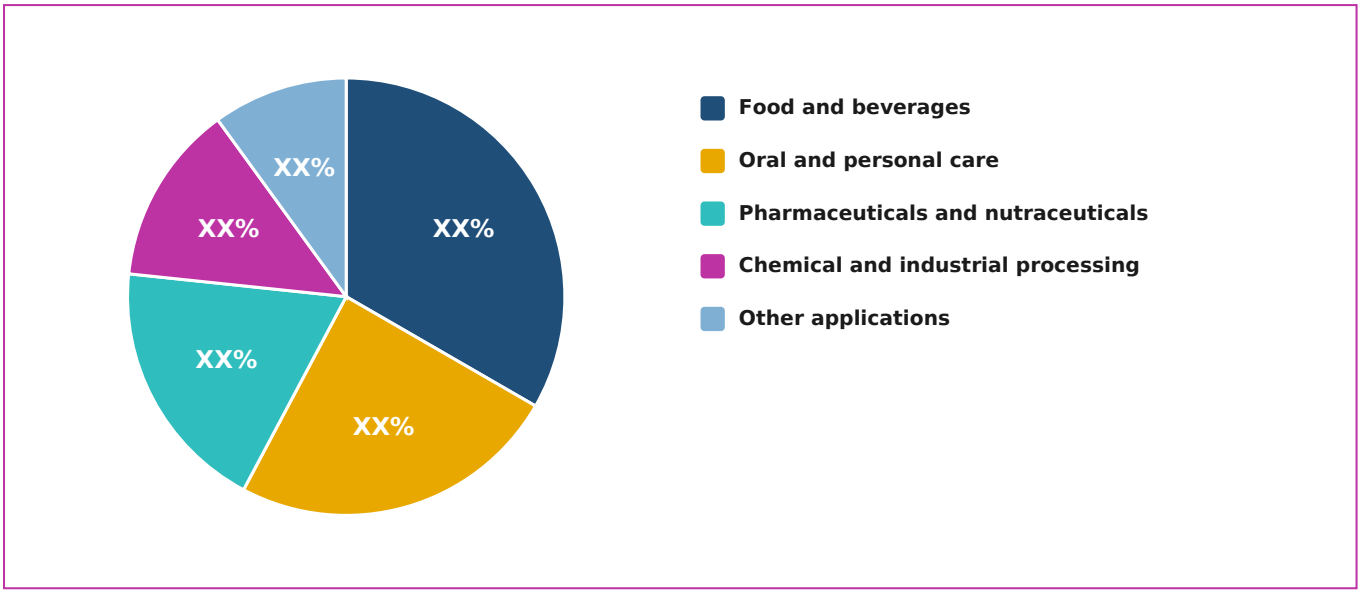
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Food grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pharmaceutical grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Personal-care grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Food and beverages remain the largest application because sorbitol provides bulk, sweetness, cooling and moisture control across numerous formulations. Oral and personal care provides resilient repeat demand, particularly from toothpaste. Pharmaceuticals gain share through sugar-free syrups, direct-compression tablets and consumer-health products, while industrial consumption is supported by surfactants, vitamin C routes and bio-based chemicals.

Value share by application, 2025



Source: XXX

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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
Oral and personal care	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pharmaceuticals and nutraceuticals	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Chemical and industrial processing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Function

Humectancy captures the largest value pool because sorbitol controls water activity and prevents drying in oral care, cosmetics and foods. Sweetening and bulking is the second-largest function, but faces greater substitution from other polyols and rare sugars. Excipient and chemical-intermediate functions grow faster as pharmaceutical output and bio-based downstream chemistry expand.

Value by function, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Humectant and moisture control	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sweetener and bulking agent	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pharmaceutical excipient	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Chemical intermediate	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Texturizer, stabilizer and other functions	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Feedstock

Corn remains the dominant feedstock because global wet-milling infrastructure supplies standardized dextrose at scale. Cassava is gaining share in Indonesia, Thailand and China, where processors exploit local crop availability and differentiated non-corn positioning. Wheat and other feedstocks remain concentrated in selected European plants and specialty supply chains.

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Value by feedstock, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Corn	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cassava	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Wheat	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other feedstocks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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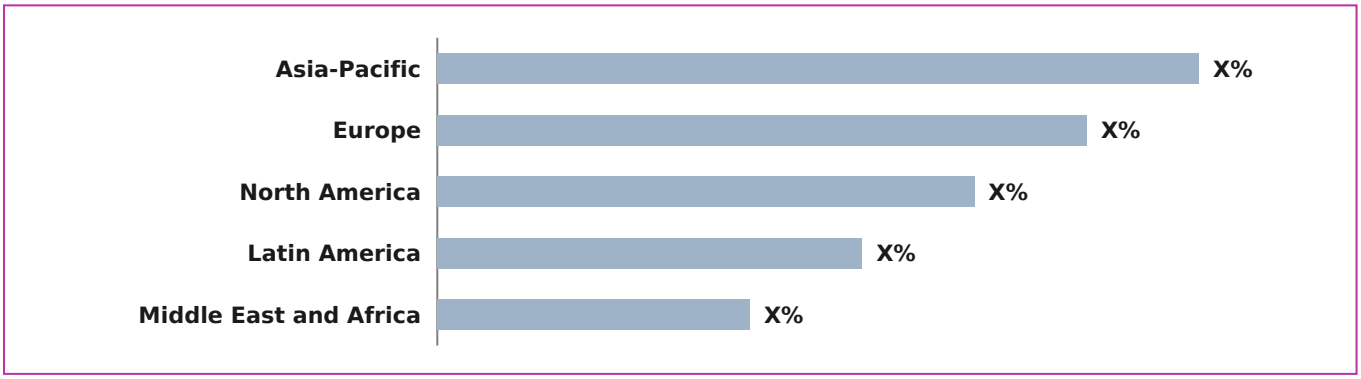
Sorbitol Market Regional Analysis and Country Outlook

Asia-Pacific generated USD XXX million in 2025, equal to XX% of global market value. China leads regional consumption through integrated starch processing, oral care, vitamin C intermediates and surfactants, while India combines rapid branded toothpaste growth with an established domestic producer base. Indonesia and Thailand are strengthening cassava-derived sweetener supply, giving Southeast Asian buyers an alternative to corn-based imports.

Europe holds a XX% share and remains the leading region for pharmaceutical excipients, specialty polyols and bio-based chemical derivatives. France, Germany and the Netherlands anchor production, formulation expertise and cross-border distribution. European growth is slower in commodity food grades, but pharmacopeial sorbitol and isosorbide-linked demand support higher average selling values.

North America accounts for XX% of revenue and is characterized by mature oral-care and food demand, stringent customer qualification and strong use of compressible pharmaceutical grades. Latin America and the Middle East and Africa are smaller but increasingly attractive markets: Brazil benefits from large personal-care and processed-food industries, while Gulf markets and South Africa rely on imported material for pharmaceuticals, confectionery and oral care.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

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

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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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Sorbitol Market Competitive Landscape and Company Share

The global market is moderately concentrated. Roquette, Cargill, Tereos, Ingredion and ADM combine integrated carbohydrate processing, global quality systems and multi-application technical support, while Chinese and Indian producers exert substantial influence on standard liquid-grade pricing. The leading five suppliers generated XX% of 2025 market revenue.

Competition separates into high-volume liquid supply and specification-intensive specialty grades. Large starch processors defend volume accounts through feedstock integration, tank logistics and multi-year contracts; specialty leaders compete through USP-NF and Ph. Eur. compliance, direct-compression performance, controlled particle size and formulation services. Regional firms including Gulshan Polyols, Sukhjit Starch & Chemicals and PT Sorini Agro Asia Corporindo are strongest where proximity and delivered cost determine purchasing.

Strategic investment is moving toward downstream value rather than undifferentiated capacity. Roquette's acquisition of IFF Pharma Solutions strengthened its oral-dosage platform, while suppliers are extending sorbitol into agriscience, personal care and bio-based polymers. Capacity rationalization in Europe and expansion of flexible starch-processing assets in Asia will keep the market disciplined at the specialty end but price-competitive in bulk liquids.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Roquette Frères	XXX	XXX	XXX	XXX
Cargill, Incorporated	XXX	XXX	XXX	XXX
Tereos	XXX	XXX	XXX	XXX
Ingredion Incorporated	XXX	XXX	XXX	XXX
Archer Daniels Midland Company	XXX	XXX	XXX	XXX
PT Sorini Agro Asia Corporindo	XXX	XXX	XXX	XXX
Gulshan Polyols Limited	XXX	XXX	XXX	XXX
Sukhjit Starch & Chemicals Limited	XXX	XXX	XXX	XXX
Ueno Fine Chemicals Industry, Ltd.	XXX	XXX	XXX	XXX
Mitsubishi Corporation Life Sciences Limited	XXX	XXX	XXX	XXX
Shandong Tianli Pharmaceutical Co., Ltd.	XXX	XXX	XXX	XXX
Kasyap Sweeteners Limited	XXX	XXX	XXX	XXX

Source: XXX

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Sorbitol Market Forecast, Scenarios and Commercial Opportunities

Global demand will add approximately USD XXX million between 2025 and 2031. The central forecast assumes steady oral-care penetration, continued reduced-sugar reformulation and faster pharmaceutical output in Asia-Pacific, with average selling prices normalizing after periods of feedstock and energy volatility.

The upside scenario is driven by faster commercialization of isosorbide polymers, stronger consumer-health manufacturing and broader use of sorbitol in agriscience formulations. Under this scenario, the market reaches USD XXX billion in 2031; the downside scenario reaches USD XXX billion if commodity overcapacity, weak food production and aggressive substitution constrain pricing.

Winning suppliers will combine low-cost glucose conversion with application-specific purification, dependable liquid logistics and documented product performance. Pharmaceutical qualification, non-GMO traceability, cassava feedstock capability and customer co-development will deliver the strongest mix improvement through 2031.

Opportunities

- Direct-compression and low-endotoxin pharmaceutical grades
- Cassava-based and traceable non-GMO sorbitol
- Agriscience humectants and micronutrient-delivery formulations
- Bio-based isosorbide for polymers, coatings and specialty resins
- Premium oral-care formulations in India, Southeast Asia and Africa
- Customized low-mannitol and non-crystallizing liquid grades

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