Business Review

Soluble and Insoluble Fibres Markets

Supply, Demand, and Forecast

2024- 2030

INTRODUCTION

The global fibre ingredients market is evolving as consumers seek digestive wellness, sugar reduction, and plant-based nutrition. Soluble fibres such as inulin, oligosaccharides, polydextrose, and beta-glucans contribute to bulking and prebiotic benefits, while insoluble fibres such as cellulose, wheat fibre, oat fibre, and pea fibre aid texture, water retention, and gut health. Global trade tensions are impacting soluble fibre supply chains, as ingredients produced in China, such as fructooligosaccharides (FOS), xylooligosaccharides (XOS), and galactooligosaccharides (GOS), are shipped worldwide. Trade disputes and logistics challenges will impact pricing and availability, in turn influencing product formulations. Inulin production is expanding, supporting bakery and dairy applications. GOS is moving beyond infant nutrition into functional beverages and supplements, while XOS gains interest for prebiotic effects at low doses. Insoluble fibres, being bulkier, are less cost-efficient for international trade. Clean-label trends are shaping cellulose fibre use, while wheat and oat fibres are in demand for high-fibre staples. Post-COVID, consumers are prioritizing immune health and well-being, driving product reformulations and innovations, particularly in plant-based meat analogs. Regulatory shifts and rising fibre awareness continue to shape dietary trends.

OBJECTIVES

To identify supply, demand, forecast demand, and trends for soluble and insoluble fibre ingredients by key country/region. This comprises the following sub-objectives:

- Estimate current production volumes (kt) by country/region, manufacturer, and fibre type
- Profile manufacturers and their fibre ingredients, key product types and production capacities
- Track trade volumes (kt) between different regions to estimate availability (kt) for each fibre type
- Obtain indicative prices and pricing trends by country/region and fibre ingredient type
- Summarize legislation governing the use of soluble and insoluble fibres in each country/region
- Provide end-user insights into current and anticipated use of fibre ingredients, competitor ingredients, and alternative sources.
- Estimate current (2024) and forecast demand (2029) volumes (kt) for each fibre ingredient by country/region and end-use sector.
- Deliver client-specific summaries and strategic recommendations.

PRODUCTS

Soluble fibres include inulin (short-chain, DP < 9; long-chain, DP 10+), oligosaccharides (fructo-OS*, galacto-OS, isomalto-OS, XOS, galactofructose), polydextrose, soluble vegetable§ fibre (resistant starch, resistant dextrin), beta-glucan-rich fibre, tagatose, psyllium, hydrolysed gums, chitosan, and konjac.

*Ingredients to be split by liquid and powder formats, where available. *split by FOS 1 (sugar-derived) and FOS 2 (inulin-derived). §split by source material.*

Insoluble fibres include wheat, soy, oat, pea fibre, pea hull fibre, beet, cellulose, bamboo, cottonseed, flax, potato, bagasse, citrus fibre, apple fibre, and other novel sources where relevant.

POSITIONING

Prebiotic, gut health, fibre-enriched, sugar reduction, glycemic control, satiety support, heart health, immunity support, clean-label, plant-based, natural, functional food, and high-fibre

END SECTORS

Bakery (including cereals and bars), dairy, beverages, confectionery (chocolate and others), fruit preparations, fat-based fillings, baby/infant formula, processed meat, meat analogs, functional foods, performance nutrition/supplements (including capsules), other food, and non-food applications such as pet food and animal feed (including prebiotics)

GEOGRAPHICAL

North America (USA, Canada), Brazil, Europe (EU27+UK+CH+NO), China, Asia-Pacific (India, Singapore, Indonesia, Malaysia, Thailand, Vietnam, South Korea, Australia), Middle East and Africa (MEA), and the Rest of the World (RoW)

TIMESCALE

Supply and current demand: 2024; forecast demand: 2030

SUBSCRIPTION

Please contact us for subscription details

PUBLICATION

August 2025 (*estimated*)

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