MULTICLIENT STUDY

Business Review
High Intensity Sweeteners
Supply & Demand Dynamics

Key Global Markets

2016-2021

March 2017

Sectors



High Intensity Sweeteners



Markets



USA
EU28
China
India
ASEAN
RoW

GIRACT
Geneva, Switzerland

Transnational Business Research & Consultancy

Introduction



The global excess of calories, from both carbohydrates and fats, has become a public health issue of enormous proportions. This has been a problem in the making for more than 2 decades now, when the first signs of sugar/fat being responsible for lifestyle diseases were noted and many solutions put forth. In fact, it is no surprise that recent evidence points to the sugar lobby having paid off some academic researchers to put the blame on fat in the 1970's. It is no longer the case that individual ingredients are blamed for any disease condition and the food industry is taking steps to reformulate its matrices for a holistic reduction in calories/align with H&W trends globally. Governmental intervention in the form of regulations on calories or specific ingredients is also helping this trend. High intensity sweeteners promise to provide a magic toolbox to many formulators who are faced with the problem of reducing calories in sweet goods, while retaining desirable organoleptic properties. It is a critical issue in specific sectors such as the US carbonated drink industry which is witnessing a significant fall in sales. Taxes on sugar sweetened beverages are also being threatened/enacted in many regions.

After saccharin and cyclamates, there was a flurry of new product introductions including aspartame, acesulfame K, sucralose and stevia. Global supply dynamics pushed the production of these sweeteners towards China, which subsequently

also became one of the biggest consumers of these ingredients. Europe is currently reacting, with an anti-dumping regulation against Chinese aspartame. There is a need to understand China clearly, due in part also to its overcapacity problems (and price wars). Another issue is that of positioning. Many "natural" HIS have been introduced. Stevia is leading this charge, with limited success.

Giract, the global ingredient specialist, has been publishing market studies on the sweetener industry over many decades. Based on a 360 degree approach to research and analysis, Giract aims to present the key driving factors and pertinent challenges facing this industry.

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Objectives of this study

High Intensity Sweeteners – Supply and Demand Dynamics



- Establish production by product and producer and estimate the current supply situation for the different HIS ingredients
- Identify end-user perceptions of sweeteners and ingredient choice as well as development needs and barriers (technical, legal, label, commercial, blends, etc.)
- Estimate current demand by product and by sector in each of the key markets and across the world
- Understand regulatory challenges and their impact on the industry across different regions
- Forecast demand by product sector and market to 2021
- Techno-commercial evaluation of new generation of sweeteners

GIRACT

Geneva, Switzerland

Subscription

This unique study examines supply/demand and forecasts of High Intensity Sweeteners across the key global regions.

SCOPE

Products



- Sucralose, aspartame, acesulfame K, cyclamate, saccharin, stevia (stevioside, rebaudioside A), alitame, neotame, thaumatin, neohesperidine DC, others

Markets



- **Supply & Demand Dynamics** - Global – with focus on USA, EU28, China, India, ASEAN and RoW

STUDY HIGHLIGHT

Programme

Following an initial review of Giract in-house data, interviews with selected key players (producers, traders, end-users) have been carried out in order to derive real understanding of the market forces

Current: 2016
Forecast: 2021

Timescale



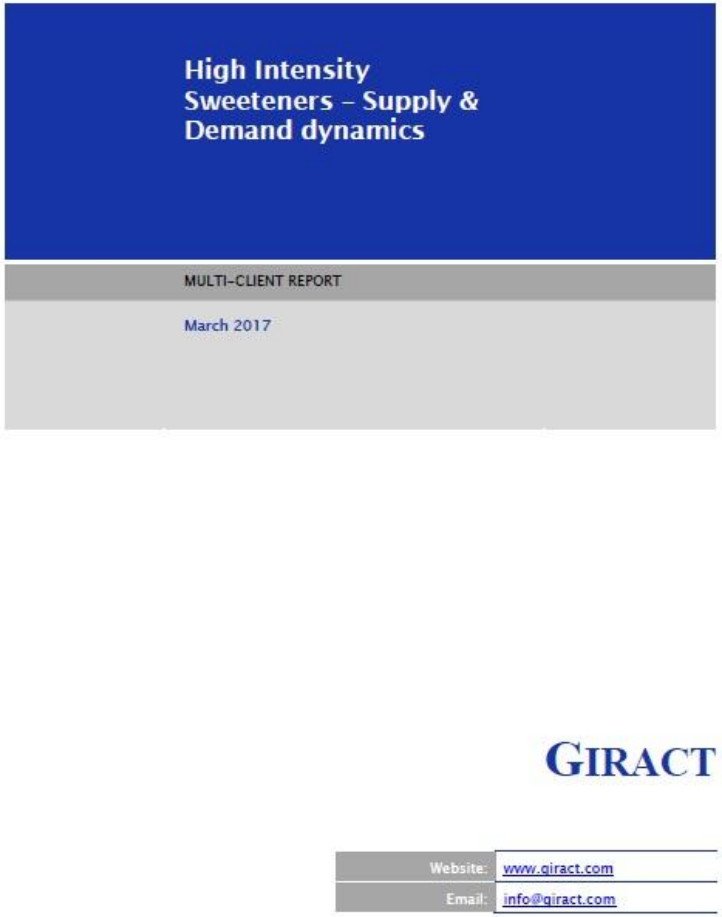
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1. **Electronic Copy** of report in searchable PDF format
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3. Report published in **March 2017**

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High Intensity Sweeteners – Supply & Demand dynamics

MULTI-CLIENT REPORT

March 2017

GIRACT

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1. USA

1.1. DEMOGRAPHICS

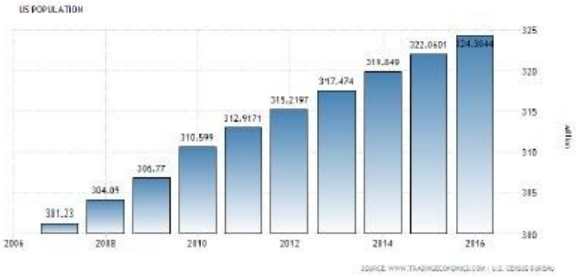
The United States is the third most populous country in the world, behind China and India.The population growth is estimated at CAGR of 0.8% during the period 2008-2016. The country is largely urbanised with over 81% of the population residing in the cities and suburbs. The population is racially diverse with Asians (26%) and Hispanics (47%) as a major part of the immigrant group in 2016.

Population trend - USA mio

	2008	2010	2012	2014	2016	CAGR%
USA						

Source: www.tradingeconomics.com

Data Edited



1.2. FOOD INDUSTRY

#

1.2.1. MAIN DRIVING FORCES

High intensity sweetener market in the US is currently facing slow growth rates as the large user of HIS, beverage, is mature and its sales have been declining in the recent years. HIS market was largely driven by the health and wellness trend, demanding foods with reduced or less calorie, in order to reduce weight gain.

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Regulatory status of HIS, USA

Sweetener	Regulatory Status	Sweetness Potential	ADI (mg/kg bw/day)
Acesulfame K (Ace-K)			
Advantame			
Aspartame			
Neotame			
Saccharin			
Siraitiagrosvenorii Swingle (Luo Han Guo) fruit extracts (SGFE)			
Certain high purity steviol glycosides purified from the leaves of *Stevia rebaudiana* (Bertoni) Bertoni			
Sucralose			

Data Edited

1.4. SUPPLY SCENARIO

High Intensity Sweeteners production, USA, 2016 kt

Producer	Sweetener type	Volume (tons)
Tate & Lyle	Sucralose	
PMC Specialities	Saccharin	
Total		

Source: Giract, based on database and interviews

- #

1.4.1. PMC SPECIALITIES GROUP

Sample Report Pages

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Drink/beverage powders

- #

Fruit drinks

- #

Top 5 Beverage companies and its brands in the USA, 2016

Company	Brands
Coca Cola Co.	
PepsiCo.	
Dr. Pepper Snapple Group	
Monster Beverage Co.	
Nestle Waters	
Cott	

Source: Giract, based on retail analysis

Data Edited

Beverage Consumption Trends and Forecast, USA

	2012 kt	2016 kt	2021 kt	CAGR% 2012–2016	CAGR% 2016–2021
Carbonated drinks					
Energy Drinks					
Drink/beverage powders					
Fruit Drinks					
RTD coffee/tea					
Total					

Source: Giract, based on Canadean and secondaries

Data Edited

- #

Current Use and Forecast of HIS in Beverages, USA (tons)

Sweetener type	2016	2021	CAGR (%)
Sucralose			1.0
Aspartame			0.8
Acesulfame K			1.0
Cyclamate			0.0
Saccharin			-0.3
Stevia			4.8

Data Edited

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General issues on HIS usage by the Company

HIS based table top sweeteners provide sweet taste and enhance flavor. Health claims are not made. Statutory labeling is not an issue. Lower calorific value, lower glycemic index, origin, ease of use are considered in using HIS. It currently supplies all HIS in its product categories. Its product price varies based on the ingredient and bulking agents. It does not have problem in supply of HIS coming from one region. It has a robust supply chain and relationship with suppliers. The company formulates its own blends along with suppliers for application support in blends.

Awareness, use, and intended use of HIS

	Aware ?	Tested ?	Used ?	Using ?	Will use ?
Aspartame					
AceK					
Saccharin					
Cyclamate					
Stevia (stevioside, rebaudioside A)					
Sucralose					
Alitame					
Neotame					
Thaumatin					
Neohesperidine DC					
Others (monk fruit extract)					

Data Edited

The company uses more than 1100t per annum of HIS. Its volume is increasing steadily with the growth in the production and sales.
Generally, in table top sweeteners, 5% of HIS is being used along with other bulking agents (maltodextrins, dextrose). Aftertaste and off flavor remains as problem in using few HIS such as saccharin and aspartame.

Future use of HIS

Sucralose and natural sweeteners will be interesting in table top sweeteners in future. Metallic aftertaste and bitterness of HIS still remains as a problem and innovations related to improving its taste or blocking bitterness at affordable cost is expected and found to be interesting in the future.

Sample Report Pages

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Current HIS market value in USA, 2016 USD mio

USD mio	Table-top	Beverages Confectionery	Other food	Non-food	Total
Sucralose					
Aspartame					
Ace K					
Cyclamate					
Saccharin					
Stevia					
Alitame					
Neotame					
Thaumatin					
NHDC					
Monk fruit extract					
Total					

Data Edited

1.6.2.2 *TOTAL FORECAST DEMAND BY END-USE MARKETS*

Demand for High Intensity Sweeteners by Sector, USA, 2016-2021 tons

Sector	2016	2021	CAGR (%)
Table-top			
Beverages			
Confectionery			
Other Food			
Non-food			
Total			

Source: Giract, based on database and interviews

Data Edited

- #

1.7. DEMAND PERSPECTIVES

Summary of demand perspectives

Company	Sector	Relevant comments
Bai Brands	Beverages	– #
Califia Farms	Beverages	– Monk fruit extract is preferred for its taste profile, good organoleptical properties and no aftertaste issues – It has wish list for ideal sweetener with no metallic aftertaste

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Product and innovation trends

– #

COSMETICS

- #

PET FOODS

- #

Key players

– #

Product and innovation trends

- #

Pet food – Producers and Market share, USA, 2016

Producers	Market Share %
Mars	47.0
Nestle Purina Petcare	32.6
Big Heart Pet Brands	6.2
Hill's Pet Nutrition	6.0
Others	8.1
Total	100.0

Source: Giract, based on secondaries and database

Current Use and Forecast of HIS in Non-Foods, USA (tons)

Sweetener type	2016	2021	CAGR (%)
Sucralose			
Aspartame			
Acesulfame K			
Cyclamate			
Saccharin			
Stevia			
Alitame			
Neotame			
Thaumatin			
Neohesperidine DC			
Others			

Data Edited