

Business Review

# Polyols – Global markets

2017 - 2022

Focus on Europe, Americas, China, India, ASEAN, with RoW overview

## INTRODUCTION

Polyols have long since become commoditized as an ingredient. Over the years since their introduction, production and consumption has shifted from the western world to China. This shift was a significant contributor to the commoditization of this ingredient class. Despite the perceived potential, India has never been a large polyol manufacturer or consumer. Hence from a geographic perspective the action remains in China and the USA. There have been significant capacity increases in North America, with China also promising to reach full capacity utilization soon. The growing popularity of polyols within the food space, accelerated by a fall in prices is the single most important reason for this. There have been some temporary production hurdles in Indonesia, and a further threat of pollution-related issues derailing China's increasing capacity.

The positioning of xylitol for oral health and its iniquitousness in chewing gums and candy has made it a popular hydrogenation product. Typical applications for sorbitol in food applications, leveraging its low-calorie as well as humectant properties remain the main demand sources till now. Opportunities for polyols may be found in new geographies, intra polyol shift in choice by end-users, as well as in applications that have untapped potential such as table-top sweeteners.

Giract, the food ingredients and technology business review specialist, has a background of 47 years' research and forecasting. It has an unparalleled understanding of the dynamics of the marketplace and privileged contacts with opinion leaders worldwide. It has published several multi-client studies on polyols since 1998, the most recent one in 2015.

As a key player or a company wishing to learn more about these buoyant ingredients, this study serves a dual purpose for you – to help explore and exploit these high-profile markets and to make full use of an in-depth understanding of the market drivers to develop your overall business strategy in this sector.

## OBJECTIVES

The overall objective is to provide a full view of the market for polyols across the world. This can be broken down into the following sub-objectives:

- To examine the trends in production, prices and producers of these ingredients
- To evaluate the market trends for end-products using polyols
- To estimate current demand for polyols across regions and end-use sectors, both food and non-food
- To understand the 'why' and 'why not' concerning the use/non-use of these ingredients by key end-users in the food and non-food sectors across regions
- To forecast demand to 2022 by ingredient across end-use sectors and regions

## PRODUCTS

Sorbitol liquid, sorbitol powder, mannitol, crystalline maltitol, liquid maltitol (HGS and HSH), isomalt, lactitol, xylitol and erythritol

## MARKETS

Global supply and demand, with focus on Europe (EU28, Switzerland, Norway), N. America (USA, Canada, Mexico), Other America (Brazil, other LATAM), China, India, ASEAN. RoW as an overview.

**End-use sectors:** chewing gum, other confectionery, bakery, beverage, other food, oral care, skin care, hair care, vitamin C, pharmaceuticals, other non-food.

## TIMESCALE

2017 - 2022

## PROGRAMME

Following an initial review of Giract's extensive in-house data, the dominant element of the study will be interviews with key actors – producers, end-users, industry experts and authorities – in order to derive real understanding of the latest changes in market forces.

## PUBLICATION

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## SUBSCRIPTION

EUR #####

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## CONTENTS

<b>1. INTRODUCTION</b> .....	<b>13</b>
1.1. OBJECTIVES .....	13
1.2. PRODUCTS .....	14
1.3. END USER SECTORS .....	14
1.4. GEOGRAPHICAL .....	14
1.5. TIMESCALE .....	14
1.6. PROGRAMME .....	15
1.7. GLOSSARY & EXCHANGE RATES.....	16
<b>2. EXECUTIVE SUMMARY</b> .....	<b>17</b>
2.1. GLOBAL POLYOLS SUPPLY .....	17
2.1.1. CHINA .....	17
2.1.2. AMERICAS.....	18
2.1.3. EUROPE.....	18
2.1.4. OTHER ASIA.....	19
2.1.5. PRICES .....	20
2.2. POLYOLS DEMAND OVERVIEW- 2017/18-22 .....	24
2.3. DEMAND SECTORS FOR POLYOLS.....	27
2.3.1. CHEWING GUM.....	28
2.3.2. OTHER CONFECTIONERY .....	29
2.3.3. BAKERY.....	31
2.3.4. BEVERAGES .....	32
2.3.5. OTHER FOODS .....	33
2.3.6. NON-FOOD SECTORS.....	34
2.4. SPRAY-DRIED AND CRYSTALLINE POLYOLS .....	36
2.5. CONCLUSIONS.....	37
<b>3. NORTH AMERICA</b> .....	<b>39</b>
3.1. INTRODUCTION.....	39
3.1.1. DEMOGRAPHICS – USA .....	39
3.1.2. DEMOGRAPHICS – CANADA.....	40
3.1.3. DEMOGRAPHICS – MEXICO .....	42
3.1.4. FOOD INDUSTRY – NORTH AMERICA.....	44
3.2. SUPPLY.....	45
3.2.1. SUPPLIER PROFILES .....	45
3.2.1.1 ADM.....	45
3.2.1.2 CARGILL .....	46
3.2.1.3 DUPONT-DANSICO .....	47
3.2.1.4 INGREDION .....	47

3.2.1.5	ROQUETTE	48
3.2.2.	FORTRESS GLOBAL ENTERPRISES	50
3.2.3.	SUPPLY OVERVIEW	50
3.2.4.	TRADE	51
3.2.5.	INDICATIVE PRICES, NORTH AMERICA, 2017-18	51
3.2.6.	LEGISLATION	52
3.3.	DEMAND SECTORS	53
3.3.1.	CHEWING GUM	53
3.3.2.	OTHER CONFECTIONERY	57
3.3.3.	BAKERY	61
3.3.4.	BEVERAGES	64
3.3.5.	OTHER FOODS	67
3.3.6.	ORAL CARE	73
3.3.7.	SKIN CARE	76
3.3.8.	HAIR CARE	78
3.3.9.	VITAMIN C	80
3.3.10.	PHARMACEUTICALS	82
3.3.11.	OTHER NON FOOD	85
3.4.	POLYOLS DEMAND OVERVIEW	88
3.4.1.	POLYOLS CURRENT DEMAND OVERVIEW, NORTH AMERICA, 2017/18	88
3.4.2.	POLYOLS FORECAST DEMAND OVERVIEW, NORTH AMERICA, 2022	89
3.5.	END USE	90
3.5.1.	OVERVIEW	90
3.5.2.	END-USER PERCEPTIONS	91
3.5.2.1	BOSTON AMERICA CORP	91
3.5.2.2	COLGATE-PALMOLIVE	93
3.5.2.3	DIANA PET FOOD	94
3.5.2.4	THE KROGER COMPANY	95
3.5.2.5	MONDELEZ INTERNATIONAL	97
3.5.2.6	NCFI POLYURETHANES	101
3.5.2.7	O-AT-KA MILK PRODUCTS COOPERATIVE INC	104
3.5.2.8	PHARMAVITE	106
3.5.2.9	STONYFIELD FARM	107
3.5.3.	ADDITIONAL END-USER COMMENTS	109
3.5.3.1	BIONAT-SANO DE MEXICO	109
3.5.3.2	DAWN FOODS	109
3.5.3.3	EARTH'S CREATION	110
3.5.3.4	FORWARD FOODS	111
3.5.3.5	GHW USA	111
4.	BRAZIL	113
4.1.	INTRODUCTION	113
4.1.1.	DEMOGRAPHICS	113
4.2.	INDUSTRY STRUCTURE	114
4.2.1.	FOOD INDUSTRY	114

4.3.	SUPPLY.....	115
4.3.1.	SUPPLIER PROFILES.....	115
4.3.1.1	INGREDION BRAZIL.....	115
4.3.2.	SUPPLY OVERVIEW.....	116
4.3.3.	TRADE.....	116
4.3.4.	INDICATIVE PRICES, BRAZIL, 2017/18.....	117
4.3.5.	LEGISLATION.....	117
4.4.	DEMAND SECTORS.....	118
4.4.1.	CHEWING GUM.....	118
4.4.2.	OTHER CONFECTIONERY.....	119
4.4.3.	BAKERY.....	121
4.4.4.	BEVERAGES.....	123
4.4.5.	OTHER FOODS.....	124
4.4.6.	ORAL CARE.....	126
4.4.7.	SKIN CARE.....	128
4.4.8.	HAIR CARE.....	130
4.4.9.	VITAMIN C.....	132
4.4.10.	PHARMACEUTICALS.....	132
4.4.11.	OTHER NON FOOD.....	134
4.5.	POLYOLS DEMAND OVERVIEW.....	136
4.5.1.	POLYOLS CURRENT DEMAND OVERVIEW, BRAZIL, 2017/18.....	136
4.5.2.	POLYOLS FORECAST DEMAND OVERVIEW, BRAZIL, 2022.....	137
4.6.	END USE.....	139
4.6.1.	OVERVIEW.....	139
4.6.2.	END-USER PERCEPTIONS.....	139
4.6.2.1	HUE FOODS.....	139
4.6.2.2	MAPRIC.....	141
4.6.2.3	SS NATURAL.....	142
5.	OTHER LATAM.....	144
5.1.	INTRODUCTION.....	144
5.1.1.	DEMOGRAPHICS.....	144
5.2.	INDUSTRY STRUCTURE.....	145
5.2.1.	FOOD INDUSTRY.....	145
5.3.	SUPPLY.....	149
5.3.1.	TRADE.....	150
5.3.2.	INDICATIVE PRICES, OTHER LATAM, 2017/18.....	151
5.3.3.	LEGISLATION.....	151
5.4.	DEMAND SECTORS.....	152
5.4.1.	CHEWING GUM.....	152
5.4.2.	OTHER CONFECTIONERY.....	154
5.4.3.	BAKERY.....	156
5.4.4.	BEVERAGES.....	158
5.4.5.	OTHER FOODS.....	159
5.4.6.	ORAL CARE.....	159

5.4.7.	SKIN CARE .....	161
5.4.8.	HAIR CARE.....	162
5.4.9.	VITAMIN C .....	163
5.4.10.	PHARMACEUTICALS.....	163
5.4.11.	OTHER NON-FOOD .....	165
5.5.	POLYOLS DEMAND OVERVIEW .....	167
5.5.1.	POLYOLS CURRENT DEMAND OVERVIEW, OTHER LATAM, 2017/18 .....	167
5.5.2.	POLYOLS FORECAST DEMAND OVERVIEW, OTHER LATAM, 2022 .....	168
5.6.	END USE.....	169
5.6.1.	OVERVIEW.....	169
5.6.2.	END-USER PERCEPTIONS .....	169
5.6.2.1	3 ARROYOS.....	169
5.6.2.2	TRINI SA .....	170
6.	EUROPE.....	171
6.1.	INTRODUCTION.....	171
6.1.1.	DEMOGRAPHICS.....	171
6.2.	INDUSTRY STRUCTURE .....	172
6.2.1.	FOOD INDUSTRY .....	172
6.3.	SUPPLY.....	174
6.3.1.	SUPPLIER PROFILES .....	174
6.3.1.1	BENEO .....	174
6.3.1.2	CARGILL .....	175
6.3.1.3	DEUTSCHE HYDRIERWERKE (DHW).....	176
6.3.1.4	DSM .....	177
6.3.1.5	DUPONT .....	177
6.3.1.6	JUNGBUNZLAUER.....	178
6.3.1.7	ROQUETTE.....	178
6.3.1.8	SPI PHARMA.....	180
6.3.1.9	TEREOS.....	180
6.3.2.	SUPPLY OVERVIEW.....	181
6.3.3.	TRADE.....	181
6.3.4.	INDICATIVE PRICES, EUROPE, 2017/18.....	182
6.3.5.	LEGISLATION.....	182
6.4.	DEMAND SECTORS .....	184
6.4.1.	CHEWING GUM.....	184
6.4.2.	OTHER CONFECTIONERY .....	187
6.4.3.	BAKERY.....	189
6.4.3.1	BREAD .....	190
6.4.3.2	BISCUITS.....	191
6.4.3.3	CAKES/PASTRIES.....	191
6.4.3.4	BREAKFAST CEREALS.....	191
6.4.4.	BEVERAGES .....	193
6.4.5.	OTHER FOODS .....	195
6.4.5.1	DAIRY AND ICE CREAM.....	195

6.4.5.2	JAMS, SYRUPS, SAUCES, MARMALADES AND FRUIT PREPARATIONS.....	195
6.4.5.3	TABLE TOP SWEETENERS.....	195
6.4.5.4	DIETARY SUPPLEMENTS.....	195
6.4.6.	ORAL CARE.....	197
6.4.7.	SKIN CARE.....	200
6.4.8.	HAIR CARE.....	202
6.4.9.	VITAMIN C.....	204
6.4.10.	PHARMACEUTICALS.....	205
6.4.11.	OTHER NON FOOD.....	209
6.4.11.1	POLYETHER POLYOLS.....	209
6.5.	POLYOLS DEMAND OVERVIEW.....	211
6.5.1.	POLYOLS CURRENT DEMAND OVERVIEW, EUROPE, 2017/18.....	211
6.5.2.	POLYOLS FORECAST DEMAND OVERVIEW, EUROPE, 2022.....	212
6.6.	END USE.....	213
6.6.1.	OVERVIEW.....	213
6.6.2.	END-USER PERCEPTIONS.....	214
6.6.2.1	CHUPA CHUPS.....	214
6.6.2.2	CLOETTA SVERIGE.....	216
6.6.2.3	COLGATE-PALMOLIVE POLAND.....	219
6.6.2.4	DDD INTERNATIONAL.....	221
6.6.2.5	HEALTHY BY NATURE.....	223
6.6.2.6	PCC ROKITA.....	225
6.6.2.7	VITAR, S.R.O.....	227
6.6.2.8	VSI / HEARTHSIDEFOODS.....	229
7.	CHINA.....	231
7.1.	INTRODUCTION.....	231
7.1.1.	DEMOGRAPHICS.....	231
7.2.	INDUSTRY STRUCTURE.....	231
7.2.1.	FOOD INDUSTRY.....	231
7.3.	SUPPLY.....	232
7.3.1.	SUPPLIER PROFILES.....	232
7.3.1.1	ROQUETTE (CHINA) FINE CHEMICAL.....	232
7.3.1.2	SHANDONG TIANLI PHARMACEUTICAL.....	233
7.3.1.3	SHANDONG LUJIAN BIOLOGICAL TECHNOLOGY.....	234
7.3.1.4	HEBEI HUAXU PHARMACEUTICAL.....	234
7.3.1.5	HEBEI ZHAOZHOU LIMIN SUGAR.....	234
7.3.1.6	KHALISTA (LIUZHOU) CHEMICAL INDUSTRIES.....	234
7.3.1.7	QINHUANGDAO LIHUA STARCH.....	235
7.3.1.8	SHANDONG FUTASTE.....	235
7.3.1.9	SHANDONG LUZHOU FOOD GROUP.....	235
7.3.1.10	BAQLINGBAO BIOLOGY CO., LTD.....	236
7.3.1.11	ANYANG CITY YUXIN XYLITOL TECHNOLOGY CO., LTD.....	236
7.3.1.12	GUANGXI VECTOR BIOTECH CO., LTD.....	237
7.3.1.13	GUANGXI NANNING CHEMICAL & PHARMACEUTICAL CO., LTD.....	237
7.3.1.14	QINGDAO MINGYUE SEAWEED GROUP CO., LTD.....	238

7.3.1.15	SHANDONG BAILONG CHUANGYUAN BIO-TECH CO., LTD.	238
7.3.1.16	SHANDONG JINTIAN BIOLOGICAL TECHNOLOGY CO., LTD.	238
7.3.1.17	SHANDONG LONGLIVE BIO-TECHNOLOGY CO., LTD.	239
7.3.1.18	ZHEJIANG HUAKANG PHARMACEUTICAL CO., LTD.	239
7.3.1.19	SHANDONG SANYUAN BIO-TECHNOLOGY CO., LTD.	240
7.3.1.20	SHIJIAZHUANG RUIXUE PHARMACEUTICAL CO., LTD.	240
7.3.1.21	DANCHENG CAIXIN SUGAR CO., LTD.	240
7.3.1.22	ZHUCHENG DONGXIAO BIOTECHNOLOGY CO., LTD.	241
7.3.1.23	SHIJIAZHUANG	241
7.3.1.24	JIANGSU NORTHEAST	241
7.3.1.25	TIANJIN CARGILL	242
7.3.2.	SUPPLY OVERVIEW	243
7.3.3.	PRICES, CHINA - 2017/18	245
7.3.4.	LEGISLATION	245
7.4.	DEMAND SECTORS	252
7.4.1.	CHEWING GUM	252
7.4.2.	OTHER CONFECTIONERY	254
7.4.3.	BAKERY	257
7.4.4.	BEVERAGES	260
7.4.5.	OTHER FOODS	263
7.4.5.1	NUTRITION BARS	263
7.4.5.2	TABLE-TOP SWEETENER	264
7.4.5.3	SAUCES	264
7.4.5.4	SPREADS	265
7.4.5.5	JAMS, JELLIES AND PRESERVES	265
7.4.6.	ORAL CARE	267
7.4.7.	SKIN CARE	269
7.4.8.	HAIR CARE	271
7.4.9.	VITAMIN C	272
7.4.10.	PHARMACEUTICALS	274
7.4.11.	OTHER NON FOOD	277
7.4.11.1	POULTRY AND ANIMAL FEED	277
7.4.11.2	POLYETHER POLYOLS	277
7.4.11.3	TOBACCO LEAF PREPARATION	278
7.4.11.4	PET HEALTH CARE	278
7.5.	POLYOLS DEMAND OVERVIEW	280
7.5.1.	POLYOLS CURRENT DEMAND OVERVIEW, CHINA, 2017/18	280
7.5.2.	POLYOLS FORECAST DEMAND OVERVIEW, CHINA, 2022	281
7.6.	END USE	282
7.6.1.	OVERVIEW	282
7.6.2.	END-USER PERCEPTIONS	283
7.6.2.1	CHINA SHIJIAZHUANG PHARMACEUTICAL (VITAMIN C UNIT)	283
7.6.2.2	FUJIAN DALI FOOD (GROUP)	285
7.6.2.3	GOOD TO CHEMICAL (ZHONGSHAN)	287
7.6.2.4	GUANGZHOU BOSS BIOLOGICAL TECHNIQUE LTD.	290
7.6.2.5	MONDELEZ(CHINA)- CHEWING GUM PLANT (YIZI INTERNATIONAL)	292

7.6.2.6	NORTH CHINA PHARMACEUTICAL COMPANY (VITAMIN C DIVISION)	295
7.6.2.7	SHANDONG YINGERLE HWA TAI FOOD	297
7.6.2.8	SHIJIAZHUANG NO.4 PHARMACEUTICAL	299
7.6.2.9	TIANJIN TEDA BIOMEDICAL ENGINEERING	301
7.6.2.10	WRIGLEY CONFECTIONERY (CHINA)- CHEWING GUM PLANT	303
7.6.2.11	YANGZHOU TRACEY	306
<b>8.</b>	<b>INDIA</b>	<b>310</b>
8.1.	INTRODUCTION	310
8.1.1.	DEMOGRAPHICS	310
8.2.	INDUSTRY STRUCTURE	310
8.2.1.	FOOD INDUSTRY	310
8.3.	SUPPLY	311
8.3.1.	SUPPLIERS	311
8.3.1.1	GAYATRI BIO-ORGANICS	311
8.3.1.2	GUJARAT AMBUJA EXPORTS	311
8.3.1.3	GULSHAN POLYOLS	311
8.3.1.4	KASYAP SWEETNERS	312
8.3.1.5	MAIZE PRODUCTS	312
8.3.1.6	SUKHJIT STARCH & CHEMICALS	313
8.3.1.7	UNIVERSAL STARCH	313
8.3.2.	SUPPLY OVERVIEW	313
8.3.3.	TRADE	314
8.3.4.	INDICATIVE PRICES, INDIA, 2017/18	314
8.3.5.	LEGISLATION	315
8.4.	DEMAND SECTORS	316
8.4.1.	CHEWING GUM	316
8.4.2.	OTHER CONFECTIONERY	319
8.4.3.	BAKERY	321
8.4.4.	BEVERAGES	323
8.4.5.	OTHER FOODS	326
8.4.6.	ORAL CARE	328
8.4.7.	SKIN CARE	330
8.4.8.	HAIR CARE	331
8.4.9.	VITAMIN C	332
8.4.10.	PHARMACEUTICALS	332
8.4.11.	OTHER NON FOOD	335
8.4.11.1	ANIMAL FEED	335
8.4.11.2	POLYETHER POLYOLS FOR POLYURETHANE RIGID FOAMS	336
8.4.11.3	OTHER NON FOOD	337
8.5.	POLYOLS DEMAND OVERVIEW	338
8.5.1.	POLYOLS CURRENT DEMAND OVERVIEW, INDIA, 2017/18	338
8.5.2.	POLYOLS FORECAST DEMAND OVERVIEW, INDIA, 2022	339
8.6.	END USE	341
8.6.1.	OVERVIEW	341



8.6.2.	END-USER PERCEPTIONS .....	342
8.6.2.1	<i>AFFY PHARMA PRIVATE LIMITED</i> .....	342
8.6.2.2	<i>CURETECH SKINCARE</i> .....	343
8.6.2.3	<i>CAVINKARE</i> .....	344
8.6.2.4	<i>SYONA COSMETICS</i> .....	345
8.6.2.5	<i>PERFETTI VAN MELLE INDIA</i> .....	345
8.6.2.6	<i>LOTTE INDIA</i> .....	346
8.6.2.7	<i>UNIBIC FOODS</i> .....	347
<b>9.</b>	<b>INDONESIA .....</b>	<b>348</b>
9.1.	INTRODUCTION .....	348
9.1.1.	DEMOGRAPHICS .....	348
9.2.	INDUSTRY STRUCTURE .....	348
9.2.1.	FOOD INDUSTRY .....	348
9.3.	SUPPLY .....	349
9.3.1.	SUPPLIER PROFILES .....	349
9.3.1.1	<i>PT SORINI AGRO ASIA CORPORINDO TBK</i> .....	349
9.3.1.2	<i>PT SORINI TOWA BERLIAN CORPORINDO TBK</i> .....	350
9.3.1.3	<i>PT BUDI STARCH AND SWEETENER TBK</i> .....	351
9.3.1.4	<i>NOVOPRIME</i> .....	351
9.3.2.	TRADERS/DISTRIBUTORS .....	351
9.3.2.1	<i>PT SREE INTERNATIONAL</i> .....	351
9.3.2.2	<i>CV STARGEM INDONESIA</i> .....	351
9.3.3.	SUPPLY OVERVIEW .....	352
9.3.4.	TRADE .....	353
9.3.5.	INDICATIVE PRICES, INDONESIA, 2017/18 .....	354
9.3.6.	LEGISLATION .....	354
9.4.	DEMAND SECTORS .....	356
9.4.1.	CHEWING GUM .....	356
9.4.2.	OTHER CONFECTIONERY .....	358
9.4.3.	BAKERY .....	360
9.4.4.	BEVERAGES .....	362
9.4.5.	OTHER FOODS .....	364
9.4.6.	ORAL CARE .....	366
9.4.7.	SKIN CARE .....	369
9.4.8.	HAIR CARE .....	371
9.4.9.	VITAMIN C .....	373
9.4.10.	PHARMACEUTICALS .....	374
9.4.11.	OTHER NON FOOD .....	377
9.5.	POLYOLS DEMAND OVERVIEW .....	378
9.5.1.	POLYOLS CURRENT DEMAND OVERVIEW, INDONESIA, 2017/18 .....	378
9.5.2.	POLYOLS FORECAST DEMAND OVERVIEW, INDONESIA, 2022 .....	379
9.6.	END USE .....	380
9.6.1.	OVERVIEW .....	380

9.6.2.	END-USER PERCEPTIONS .....	380
9.6.2.1	<i>PT ENZYM BIOTEKNOLOGI INTERNUSA</i> .....	380
9.6.2.2	<i>PT KONIMEX PHARMACEUTICAL LABORATORIES</i> .....	382
9.6.2.3	<i>PT L'ORÉAL INDONESIA</i> .....	384
9.6.2.4	<i>PT NUTRIFOOD</i> .....	386
9.6.2.5	<i>PT ULTRA PRIMA ABADI</i> .....	388
9.6.2.6	<i>PT YUPI INDO JELLY</i> .....	390
<b>10.</b>	<b>THAILAND .....</b>	<b>392</b>
10.1.	INTRODUCTION .....	392
10.1.1.	DEMOGRAPHICS .....	392
10.2.	INDUSTRY STRUCTURE .....	392
10.2.1.	FOOD INDUSTRY .....	392
10.3.	SUPPLY .....	395
10.3.1.	SUPPLIER PROFILES .....	396
10.3.1.1	<i>CANAAN ENTERPRISE (THAILAND) CO., LTD.</i> .....	396
10.3.1.2	<i>DFI CORPORATION &amp; MITR PHOL</i> .....	396
10.3.1.3	<i>EVONIK &amp; RAJBURI SUGAR</i> .....	397
10.3.1.4	<i>MANA CHEMICAL (THAILAND) CO LTD.</i> .....	397
10.3.1.5	<i>MC-TOWA INTERNATIONAL SWEETENERS CO., LTD.</i> .....	397
10.3.1.6	<i>PURE CHEM CO., LTD.</i> .....	398
10.3.1.7	<i>SIAM SORBITOL CO., LTD</i> .....	399
10.3.1.8	<i>UENO FINE CHEMICALS INDUSTRY (THAILAND), LTD.,</i> .....	400
10.3.2.	SUPPLY OVERVIEW .....	401
10.3.3.	TRADE .....	401
10.3.4.	INDICATIVE PRICES, THAILAND, 2017/18 .....	402
10.3.5.	LEGISLATION .....	403
10.4.	DEMAND SECTORS .....	407
10.4.1.	CHEWING GUM .....	407
10.4.2.	OTHER CONFECTIONERY .....	410
10.4.3.	BAKERY .....	412
10.4.4.	BEVERAGES .....	414
10.4.5.	OTHER FOODS .....	416
10.4.6.	ORAL CARE .....	419
10.4.7.	SKIN CARE .....	422
10.4.8.	HAIR CARE .....	424
10.4.9.	VITAMIN C .....	426
10.4.10.	PHARMACEUTICALS .....	426
10.4.11.	OTHER NON FOOD .....	429
10.5.	POLYOLS DEMAND OVERVIEW .....	432
10.5.1.	POLYOLS CURRENT DEMAND OVERVIEW, THAILAND, 2017/18 .....	432
10.5.2.	POLYOLS FORECAST DEMAND OVERVIEW, THAILAND, 2022 .....	433
10.6.	END USE .....	434
10.6.1.	OVERVIEW .....	434

10.6.2.	END–USER PERCEPTIONS .....	435
10.6.2.1	<i>BETTER WAY (THAILAND) CO., LTD.</i> .....	435
10.6.2.2	<i>BRAND'S SUNTORY (THAILAND) CO., LTD.</i> .....	437
10.6.2.3	<i>COLGATE–PALMOLIVE THAILAND</i> .....	439
10.6.2.4	<i>IRPC POLYOLS</i> .....	442
10.6.2.5	<i>MALEE ENTERPRISE COMPANY LIMITED</i> .....	444
10.6.2.6	<i>SIAMCHAI INTERNATIONAL FOOD COMPANY LIMITED</i> .....	445
10.6.2.7	<i>THAI LOTTE</i> .....	447
10.6.2.8	<i>THAI OTSUKA PHARMACEUTICAL CO., LTD.</i> .....	449
<b>11.</b>	<b>OTHER ASEAN.....</b>	<b>452</b>
11.1.1.	DEMOGRAPHICS.....	452
11.2.	INDUSTRY STRUCTURE .....	453
11.2.1.	FOOD INDUSTRY .....	453
11.3.	SUPPLY.....	454
11.3.1.	SUPPLIER PROFILES .....	454
11.3.1.1	<i>PFANSTIEHL SINGAPORE PTE. LTD.</i> .....	454
11.3.1.2	<i>SUNTOP ENTERPRISE (SINGAPORE)</i> .....	454
11.3.1.3	<i>THANH VU JOINT STOCK COMPANY</i> .....	454
11.3.2.	SUPPLY OVERVIEW .....	455
11.3.3.	TRADE .....	456
11.3.4.	INDICATIVE PRICES, OTHER ASEAN, 2017/18.....	456
11.3.5.	LEGISLATION.....	457
11.4.	DEMAND SECTORS .....	458
11.4.1.	CHEWING GUM.....	458
11.4.2.	OTHER CONFECTIONERY .....	461
11.4.3.	BAKERY.....	463
11.4.4.	BEVERAGES .....	466
11.4.5.	OTHER FOODS .....	468
11.4.6.	ORAL CARE.....	469
11.4.7.	SKIN CARE .....	471
11.4.8.	HAIR CARE.....	473
11.4.9.	VITAMIN C .....	474
11.4.10.	PHARMACEUTICALS.....	475
11.4.11.	OTHER NON–FOOD .....	481
11.5.	POLYOLS DEMAND OVERVIEW .....	482
11.5.1.	POLYOLS CURRENT DEMAND OVERVIEW, OTHER ASEAN, 2017/18.....	482
11.5.2.	POLYOLS FORECAST DEMAND OVERVIEW, OTHER ASEAN, 2022.....	483
11.6.	END USE.....	484
11.6.1.	OVERVIEW.....	484
11.6.2.	END–USER PERCEPTIONS .....	484
11.6.2.1	<i>LOTTE VIETNAM LIMITED</i> .....	484
11.6.2.2	<i>BMS ORGANICS MALAYSIA</i> .....	486
11.6.2.3	<i>LUSH SINGAPORE</i> .....	488
11.6.2.4	<i>VIVIENDO PHILIPPINES, INC.</i> .....	489

12. REST OF THE WORLD .....	491
12.1. INTRODUCTION.....	491
12.2. INDUSTRY STRUCTURE .....	491
12.2.1. FOOD INDUSTRY .....	491
12.3. SUPPLY.....	495
12.3.1. SUPPLIER PROFILES.....	495
12.3.1.1 AL KHOWAHIR CHEMICALS (UAE).....	495
12.3.1.2 BARENTZ GIDA VE KIMYA TIC. LTD. (TURKEY).....	495
12.3.1.3 BUSSAN FOOD SCIENCE (JAPAN).....	495
12.3.1.4 HABIB ADM LIMITED (PAKISTAN).....	496
12.3.1.5 ITTIHAD INTERNATIONAL INVESTMENT LLC, (UAE).....	496
12.3.1.6 INTEGRATED PACKAGING SYSTEMS FZCO (UAE) .....	496
12.3.1.7 MITSUBISHI SHOJI FOODTECH CO., LTD. (JAPAN).....	497
12.3.1.8 NATIONAL COMPANY FOR MAIZE PRODUCTS (NCMP) (EGYPT).....	497
12.3.1.9 ORKILA FZE (UAE).....	498
12.3.1.10 TONGAAT HULETT STARCH (SOUTH AFRICA).....	498
12.3.1.11 PRINOVA GIDA VE KIMYA TIC (TURKEY).....	498
12.3.1.12 SINERJI GIDA KIMYA TEKSTIL SAN. VE TIC. LTD (TURKEY).....	499
12.3.2. SUPPLY OVERVIEW.....	499
12.3.3. TRADE.....	500
12.3.4. INDICATIVE PRICES, ROW, 2017/18 .....	500
12.4. DEMAND SECTORS .....	501
12.4.1. CHEWING GUM.....	501
12.4.2. OTHER CONFECTIONERY .....	502
12.4.3. BAKERY.....	505
12.4.4. BEVERAGES .....	508
12.4.5. OTHER FOODS .....	512
12.4.6. ORAL CARE.....	516
12.4.7. SKIN CARE .....	518
12.4.8. HAIR CARE.....	518
12.4.9. VITAMIN C .....	519
12.4.10. PHARMACEUTICALS.....	519
12.4.11. OTHER NON-FOOD .....	520
12.5. POLYOLS DEMAND OVERVIEW .....	521
12.5.1. POLYOLS CURRENT DEMAND OVERVIEW, ROW, 2017/18.....	521
12.5.2. POLYOLS FORECAST DEMAND OVERVIEW, ROW, 2022 .....	522