

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, other food, oral care, pharmaceuticals, Vitamin C, 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.

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