

Ingredients for Table-top Sweeteners

2008/9 - 2015

USA, Europe

Supply, Demand, Players, Market Structures, Market Trends, Forecasts

INTRODUCTION

Table-top sweeteners have been popular in the West over many decades and in spite of various health worries, have been growing steadily. The advent of sucralose has created a major change in the table-top sweetener industry, particularly in the US, after years of dominance by aspartame. Sucralose was developed by sugar giant Tate & Lyle and the original patents for the product date back to the mid 1970s. Tate & Lyle is responsible for the worldwide sales of sucralose to food and beverage manufacturers, while McNeil covers the tabletop retail and foodservice sales of the brand Splenda in the USA.

Merisant, the US maker of table-top sweetener Equal and NutraSweet, took the marketer of sugar substitute Splenda McNeil Nutritionals to court, alleging advertising for the product is misleading, particularly since the claim 'natural' by Splenda was rightly thought to be extremely powerful.

In December 2008, Whole Earth Sweetener Company, obtained a GRAS status for its PureVia, an all-natural, stevia-based zero-calorie alternative to sugar that can be used in both hot and cold beverages, as well as sprinkled on cereal, fruit and yogurt. The current price levels are high and it will be interesting to see how consumers respond.

The table-top sweetener market is clearly in search of 'natural' ingredients, and the questions are "how far will this 'natural' trend go (organic? fair-trade?, etc.)?", "how much premium are consumers willing to pay for 'natural'?", "how will governments reconcile the various 'natural' claims?", "how will these 'natural' products boost the table-top markets, particularly given the recent health scares and scandals?", "how is China seen to play a role in this market?", etc.

Thus, a thorough market study on table-top sweetener ingredients is certainly required in order to evaluate the key qualitative and quantitative aspects across the two major markets of USA and Europe.

Giract, the food ingredients and technology business review specialist, has a background of 30 years' research and forecasting. It has an unparalleled understanding of the dynamics of the marketplace and privileged contacts with opinion leaders worldwide. Giract's studies on the sweetener sector since the early '80s have been landmark projects for the industry.

OBJECTIVES

- To estimate value and volume sales, market shares and trends in table-top sweeteners
- To estimate current demand for sweetener ingredients in table-top sweeteners in the USA and by key country in Europe
- To understand the 'why' and 'why not' concerning the use/non-use of these ingredients across regions and thus establish the relative importance of 'health/natural' vs 'technical aspects' for the choice of sweeteners
- To examine types and quantities of bulking agents used
- To forecast demand to 2015 by ingredient

PRODUCTS

High intensity sweeteners: Aspartame, Acesulfame-K, Cyclamate, Saccharin, Sucralose, Neohesperidine DC, Thaumatin, Stevioside, Neotame, Alitame (any use of oligosaccharides, agave, maple syrup, etc. will also be identified)

Bulking agents: Sugar, maltodextrin, lactose (natural?), dextrose, etc.

MARKETS

Global with focus on USA and Europe (further focus on UK, FR, DE, Benelux, ES, IT).

TIMESCALE

2008/9 - 2015.

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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