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US Collection

# High Intensity Sweeteners: United States

February 2017



## Highlights

### Market Environment

Historical Trends | Key Economic Indicators | Pricing Trends  
Factors Impacting Sweetener Consumption

### Segmentation and Forecasts

Products | Markets

### Industry Structure

Industry Characteristics | Market Leaders

### Resources

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# ABOUT THIS REPORT

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## Scope & Method

This report forecasts US high intensity sweetener demand in US dollars at the manufacturers' level and pounds to 2020. Total demand in value and volume terms is segmented by product in terms of:

- aspartame
- sucralose
- saccharin
- other products such as acesulfame potassium and neotame.

For the purposes of this report, the term “alternative sweeteners” describes sweetener products used as alternatives to sugar or the major corn sweeteners (high fructose corn syrup, glucose, and dextrose). Incidental use of products in non sweetener uses, such as sorbitol used as a plastics additive, is excluded.

Total demand in value terms is also segmented by market as follows:

- beverages
- food
- other markets such as personal care products and pharmaceuticals.

To illustrate historical trends, total demand in both value and volume terms is provided in annual series from 2005 to 2015; the various segments are reported at five-year intervals for 2005, 2010, and 2015.

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Key macroeconomic indicators are also provided with quantified trends. Other various topics are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*High Intensity Sweeteners: United States* (FF35107) is based on [Alternative Sweeteners Market in the US](#), a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group.

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 14 | Industry Codes Related to High Intensity Sweetener

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
311221	Wet Corn Milling	2046	Wet Corn Milling
325199	All Other Basic Organic Chemical Mfg	2819	Industrial Inorganic Chemicals, NEC
325998	All Other Miscellaneous Chemical Product and Preparation Mfg	2869	Industrial Organic Chemicals, NEC

Source: US Census Bureau

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## Resources

### The Freedonia Group

#### Freedonia Industry Studies

*Alternative Sweeteners Market in the US*, February 2017

*Natural Flavors & Fragrances*, October 2016

*World Salt*, July 2016

*World Enzymes*, June 2016

*World Flavors & Fragrances*, March 2016

*Dental Products & Materials*, January 2016

#### Freedonia Focus Reports

*Beer: United States*

*Dairy Products: United States*

*Gluten-Free Foods: United States*

*Natural & Organic Foods & Beverages: United States*

*Salty Snacks: United States*

*Snack Foods: United States*

*Soft Drinks: United States*

*Sweet Baked Goods: United States*

*Wine: United States*

#### Freedonia Custom Research

### Trade Publications

*Beverage Daily*

*Beverage Industry*

*Chemical & Engineering News*

*Confectionary News*

*Food Business News*

*Food Navigator*

*Natural Products Insider*

### Agencies & Associations

American Diabetes Association

International Sweeteners Association

Sweetener Users Association

United States Census Bureau

United States Department of Agriculture

United States Food and Drug Administration

United States International Trade Commission