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# Alternative Sweeteners

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US Industry Study with Forecasts to **2010 & 2015**

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Study #2138 | January 2007 | \$4300 | 203 pages

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### INDUSTRY STRUCTURE

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*After years of relative stability in product mix, the sweetener industry has become more dynamic with numerous new options available to end users, some marketed as “alternatives to the alternatives.”*

## US demand to grow 4% annually through 2010

US demand for alternative sweeteners is projected to increase 4.0 percent per year to \$1.1 billion in 2010. Volume growth through the same period is projected to average 3.1 percent annually. Sucralose is expected to continue to expand its dominant position in the tabletop sweetener market, and will also grow rapidly in other food applications. Second generation polyols such as erythritol and xylitol have found favor in sugarless candy and gum, and will continue to increase their presence in dairy products such as yogurt. Smaller volume sweeteners such as stevia and agave nectar are expected to register strong advances, marketed as “alternatives to the alternatives” for consumers wary of high intensity sweeteners.

## High intensity sweeteners to remain dominant type

High intensity sweeteners will remain the largest product category through 2010, due to their leadership position in diet soft drinks and tabletop uses, which are among the main applications for alternative sweeteners. In diet soft drinks, aspartame and acesulfame potassium (ace-K) will remain the leading products, due to their use in many of the top brands. Although not yet a significant threat to aspartame’s dominant position in diet soft drinks, sucralose has become the leader in the key tabletop sweetener market. Sucralose, the main sweetener in the well-known SLENDA line,



has grown from niche status to market powerhouse in only a few short years since its Food and Drug Administration approval for use as a general sweetener. Saccharin, once the only commercially significant high intensity sweetener, will see its market share continue to diminish, although it retains a significant presence in oral care products and tabletop sweeteners. While overall volume growth will accelerate, the market value for high intensity sweeteners will be suppressed by falling prices, as patent protections expire and new competitors enter the marketplace.

## Polyols to grow faster

Polyols such as sorbitol and mannitol are used mainly in food applications, which

are projected to register faster growth than the large but mature diet soft drink market, which is dominated by high intensity sweeteners. Polyols will continue to benefit from their image as natural products rather than synthetic chemicals, and from continued interest in reducing sugar intake to combat obesity, tooth decay and diabetes. Sorbitol is the largest and most established product, and will register below-average growth. Xylitol is expected to register above average. It has less than half the calories of sugar, but is equally sweet, making it a desirable tabletop replacement for sugar packets. Moreover, it has been shown to kill bacteria that can cause dental cavities, a property which many candy and gum manufacturers have seized upon in product labeling and advertising.

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## Sample Text, Table & Chart

### MARKETS

**Candy & Confection Outlook --** Candy and confectionery shipments are projected to expand through 2010. Gains will be boosted by line extensions of existing varieties of mass merchandisers as well as improved packaging in the form of the importance of snacking in the home. Advances will be further aided by fundraising projects and the continued targeting of nontraditional sales outlets. Such sites include video stores, coffee shops, hardware stores, garden centers, hardware stores, pet stores, sporting goods stores, toy stores and crafts stores. In addition, strategies such as licensing agreements with popular television programs, movies, and sports personalities and teams will support candy sales growth, as will other tie-in uses, such as with floral arrangements, gift baskets and meal kits like Kraft Foods' LUNCHABLES.

Candy shipment growth will also be supported by increasing consumption of sweets throughout the day (rather than solely as a dessert), as well as by evidence that chocolate in moderation may offer some health benefits. The popularity of various ethnic cuisines has resulted in an increased presence of spicy foods in the American diet, a trend that will bode well for mints and gum designed to freshen breath. Further gains will be restrained by competition from other convenience-oriented foods, such as yogurt and pudding cups and tubes, and health concerns regarding obesity and consumption of calories that offer little nutritional value. Health and obesity concerns will also intensify efforts to remove candy vending machines from schools or provide healthier vending machine snacks as alternatives to sweets. In addition, the aging of the US population will limit growth as older adults consume less candy than younger age groups.

92

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SAMPLE  
TEXT

TABLE V-3

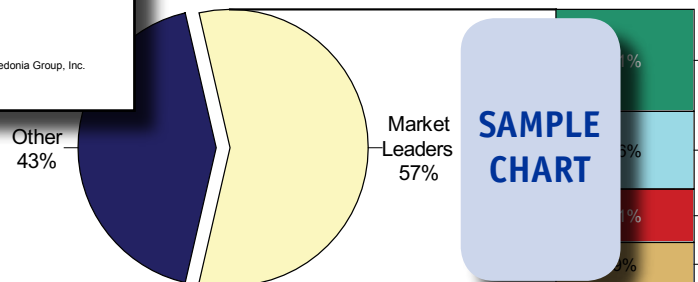
FOOD MARKETS FOR ALTERNATIVE SWEETENERS  
(million dollars)

Item	1995	2000	2005	2010	2015
Food Shipments (bil \$)	31	36	41	46	50
\$ sweetener/000\$ food	0.3	0.3	0.3	0.3	0.3
Total Sweetener Demand	5	5	5	5	5
% alternative					2
Alternative Sweetener Demand					63
Candy & Confections					74
Tabletop Sweeteners					92
Dairy Products					42
Other					55
% food					5
Alternative Sweetener Demand					50

SAMPLE  
TABLE

CHART VI-1

ALTERNATIVE SWEETENER MARKET SHARE, 2005  
(\$935 million)



SAMPLE  
CHART

**Sample Profile,  
 Table & Forecast**

**TABLE IV-2  
 HIGH INTENSITY SWEETENER DEMAND BY TYPE**

Item	1995	2000	2005	2010	2015
Resident Population (mil)	266.3	282.0	296.4	308.0	323.4
lb sweetener/000 persons	9				8
High Intensity Sweeteners (000 lb)	2547				10
Aspartame	1625				10
Sucralose					10
Ace-K	2				10
Saccharin	920				10
\$/lb	21.3				17
High Intensity Sweeteners (mil \$)	54				10
Aspartame	52				19
Sucralose					15
Ace-K					8
Saccharin	2				8
% high intensity	72.				1
Alternative Sweeteners (mil \$)	751	772	933	1140	1350

**COMPANY PROFILES**

**Wisdom Natural Brands**

1203 West San Pedro Street  
 Gilbert, AZ 85233  
 480-921-1373  
<http://www.wisdomnaturalbrands.com>

Annual Sales: verify,  
 Employment: (06)

Key Products: and other plant extract  
 sweeteners

Wisdom Natural Brands is a producer of all natural and organic nutritional supplements, sweeteners and beverages. The Company is privately held.

The Company is primarily involved in the alternative sweeteners industry through the manufacture of SWEETLEAF STEVIA sugar substitutes. SWEETLEAF STEVIA products feature the extract of leaves from the stevia plant, which is approximately 30 times sweeter than sugar. In this manner, the naturally sweet plant extract can be added to a variety of foods and beverages as a zero calorie and zero carbohydrate alternative sweetener. Moreover, the plant-derived SWEETLEAF STEVIA sweetener has a zero glycemic index, thereby making it safe for use by diabetics. Wisdom Natural Brands' SWEETLEAF STEVIA offerings, which also contain dietary inulin fiber and are marketed as nutritional supplements, are available in single serving packets, liquid, powder, tabs and concentrate forms. In addition, the Company offers SWEETLEAF LIQUID STEVIA FLAVORS, which combine stevia extracts with natural flavors to create zero calorie sweeteners for adding to water, coffee, tea, yogurt, cocktails, whip cream, smoothies, ice

**SAMPLE  
 TABLE**

**SAMPLE  
 PROFILE**

"Although sugar is expected to remain a leading sweetener, per capita consumption of sucrose is expected to continue its gradual decline. Demand is expected to reach 19.3 billion pounds in 2010, valued at \$4.1 billion. Growth is expected to be slow in nearly every market segment. At the same time, the declines in per capita consumption -- which averaged ..."

--Section III, pg. 33

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**OTHER STUDIES**

**World Enzymes**

World demand for enzymes will grow 7.6% annually through 2011. Gains will be driven by continued robust growth in pharmaceutical enzyme demand, double-digit increases in demand for biocatalysts for drug and fine chemical production, and the rapid expansion in bioethanol production from grains. This study analyzes the \$4.1 billion world enzyme industry, with forecasts for 2011 and 2016 by product, market, world region and for 15 countries. It also evaluates market share and profiles major players.

#2229 ..... 09/2007..... \$5400

**Industrial Gases**

US industrial gas demand will grow 3.6% annually through 2010. Best opportunities will remain in the key petroleum and natural gas market while faster growth will occur in smaller volume uses such as electronics and healthcare. Hydrogen will continue as the most valuable market while argon will be the fastest growing gas. This study analyzes the \$8.4 billion US industrial gas industry to 2010 and 2015 by type, delivery method and market. It also details company market share and profiles major players.

#2149 ..... 02/2007..... \$4400

**Specialty Films**

US specialty film demand will grow 4.8% annually through 2010. Gains will be driven by higher value materials, the rapid adoption of modified atmosphere packaging and improved film coating and metallization. Barrier films will remain dominant while biodegradable and water soluble films will grow the fastest from a small base. The study analyzes the \$5.8 billion US specialty film industry to 2010 and 2015 by product, function and market. It also evaluates company market share and profiles leading competitors.

#2158 ..... 02/2007..... \$4400

**Enzymes**

US enzymes demand will grow 6.9% annually through 2010, based on strong gains in key markets such as animal feed, biocatalysts, pharmaceuticals and starch processing. Pharmaceuticals will remain the largest market and one of the fastest growing. The most rapid growth will occur in animal feed additives, led by phytase. This study analyzes the \$1.6 billion US enzyme industry to 2010 and 2015 by product and market. It also considers market environment factors, details market share and profiles major players.

#2092 ..... 08/2006..... \$4300

**World Nutraceuticals**

Global demand for nutraceutical ingredients will grow 5.8% yearly through 2010. Best prospects include probiotics, soy additives, lycopene, lutein, sterol-based additives, green tea, glucosamine and chondroitin, and coenzyme Q10. China and India will be the fastest growing markets, while the US will remain the largest. This study analyzes the \$11.7 billion world nutraceutical industry to 2010 and 2015 by product, world region and for 36 countries. It also evaluates market share and profiles major players.

#2083 ..... 07/2006..... \$5500

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