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Alternative Sweeteners

US Industry Study with Forecasts for **2013 & 2018**

Study #2497 | May 2009 | \$4600 | 227 pages

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Applications other than diet soft drinks will offer opportunities for growth as food processors and consumers seek healthier food options with fewer calories or less high fructose corn syrup.

US demand to increase 3.4% yearly through 2013

US demand for alternative sweeteners is projected to increase 3.4 percent annually to more than \$1.3 billion in 2013. This unremarkable growth forecast taken alone masks a number of diverse, sometimes conflicting, trends in what has become a dynamic industry, enlivened by new products and responses to evolving consumer preferences (which at the moment favor natural, less processed ingredients). While growth in diet soft drinks, historically the largest outlet for alternative sweeteners, will be almost nonexistent, other applications will offer opportunities for growth as food processors and consumers seek healthier food options with fewer calories or less high fructose corn syrup.

High intensity sweeteners to remain largest type

High intensity sweeteners, despite the drag of a declining soft drink market, will remain the largest product category among alternative sweeteners. This leadership position is rooted in their domination of the large diet soft drink and tabletop sweetener markets. Aspartame will remain the leader in diet soft drinks, despite relentless scrutiny about its safety and competition from newer products. All of the top ten diet soft drink brands use aspartame, either alone or in conjunction with other high intensity sweeteners. The tabletop market will continue to be led by sucralose, largely



due to Tate & Lyle's SLENDA, which skyrocketed from new product to market leader in only a few years. Growth in other markets -- such as dairy products and "New Age" beverages -- will be substantial, although high intensity sweeteners are used in much lower quantities outside of their two mainstay applications.

Newer sweeteners to register sharpest growth

Though expected to remain a fairly small share of the overall market, newer alternative sweeteners will register the sharpest growth and generate the most buzz among food and beverage processors, as well as among consumers.

Recently, the most buzzworthy new product has been reb-A, an extract of the stevia plant. Rollouts of the first reb-A tabletop sweeteners following FDA approval were covered by national news organizations as well as the trade press, and high profile introductions of products with reb-A, such as juice beverages, fruit drinks, flavored waters and soft drinks, have followed.

Nevertheless, conventional sweeteners -- sucrose and corn sweeteners -- will continue to dominate the overall sweetener market in the US. Despite the best efforts of producers, no alternative sweetener is fully competitive with sugar in terms of cost, functionality and taste.

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Sample Text, Table & Chart

MARKETS

Alternative Sweetener Demand

Demand for alternative sweeteners in personal care products is projected to increase to 1.1 billion in 2013 from 741 million in 2008. Many food and beverage products are finite, well defined markets. Some shift in terms of growth resulting in some products presently include sugar and other components. Other oral care products would be ill-advised.

SAMPLE TEXT

Traditionally, the dominant sweeteners in toothpaste and rinses have been sorbitol and saccharin. Sorbitol is inexpensive, multifunctional and has a pleasant sweet taste that imitates sugar fairly closely. Moreover, sorbitol's cooling quality enhances the mint flavors commonly used in oral care products. In toothpastes, gels and creams, sorbitol offers moisture stabilization, gelling properties and emolliency. Sorbitol gained popularity in oral care products due to its natural image and low cost. Saccharin is also inexpensive, and is so sweet that a very small amount can be used in toothpaste formulations. Although saccharin does not compare favorably with other sweeteners in many applications due to its aftertaste, its flavor profile is of less concern in oral care products, where such sweeteners are meant to make a product's taste tolerable -- a much lower standard than for most food and beverage products.

However, a number of competitors are beginning to establish a presence in oral care products. Other polyols are increasing their share of the market. Among these, xylitol is expected to register the fastest growth. Xylitol helps to kill some of the bacteria that cause cavities, making it a more attractive option than other polyols. Moreover, it is lower in calories than some of the other polyols, and imparts the cooling sensation similar to sorbitol. TOM'S OF MAINE toothpastes and mouthwashes

160

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TABLE V-20

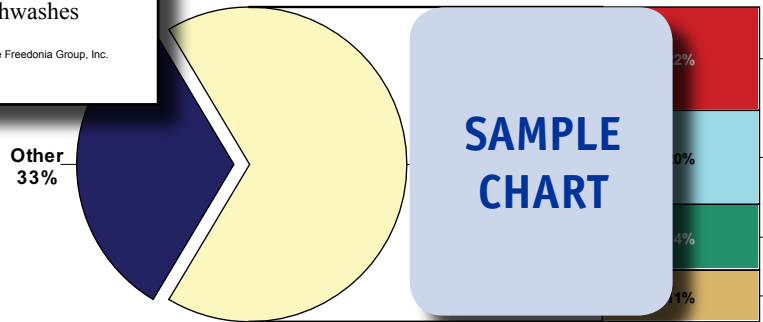
PERSONAL CARE PRODUCT MARKET FOR ALTERNATIVE SWEETENERS BY TYPE (million dollars)

Item	1998	2003	2008	2013	2018
Oral Care Product Shipments \$ sweetener/000\$ oral care shpts					
Alternative Sweetener Demand					
Polyols:					
Sorbitol					
Mannitol					
Other					
High Intensity:					
Saccharin					
Other					
% personal care Alternative Sweetener Demand					

SAMPLE TABLE

CHART VI-1

ALTERNATIVE SWEETENER MARKET SHARE, 2008 (\$1.1 billion)



SAMPLE CHART

**Sample Profile,
 Table & Forecast**

TABLE IV-9
SORBITOL DEMAND BY MARKET
 (million dollars)

Item	1998	2003	2008	2013	2018
Resident Population (mil)	275.9	290.2	304.1	319.2	334.8
lb sorbitol/person	10	11	12	13	14
Total Sorbitol Demand	2759	3192	3650	4151	4687
% sweetener	1.5	1.5	1.5	1.5	1.5
Sorbitol Demand (mil lb)	41	48	55	62	70
\$/lb	65	65	65	65	65
Sorbitol Demand					
Food:					
Candy & Confection	15	18	21	24	27
Dairy Products	10	12	14	16	18
Other	3	4	4	5	5
Personal Care Products	66	73	88	99	106
Pharmaceuticals	21	24	29	32	35
% sorbitol	63.9	60.3	53.9	47.4	42.4
Polyol Demand	252	315	423	527	655

**SAMPLE
 TABLE**

COMPANY PROFILES

NOW Health Group Incorporated
 395 South Glen Ellyn Road
 Bloomingdale, IL 60108
 630-545-9098
 http://www.nowfoods.com

Annual Sales
 Employment

Key Products
 and competitive

**SAMPLE
 PROFILE**

NOW Foods, a division of NOW Foods, manufactures and distributes personal care products and sports nutrition products. The company maintains a 263,000-square-foot facility in Bloomingdale, Illinois that encompasses manufacturing, research and development, and warehouse operations. The Company's products are sold through various retail chains.

The Company's products include stevia extract; xylitol, erythritol and sorbitol polyols; and conventional sweeteners. NOW Food's stevia extract is produced via a process that uses only water and alcohol. The resulting extract is treated with a vegetarian-source enzyme to reduce the licorice aftertaste of regular stevia extracts. The Company markets stevia extract as a dietary supplement in liquid, tablet, granule and powder forms. Specific products include STEVIA BALANCE with inulin fructooligosaccharide and chromium; STEVIA GLYCERITE liquid, which includes a higher amount of glycerin than other stevia extracts; stevia rebaudiana leaf in powder form; and stevia liquid extract in such flavors as French Vanilla, Dark Chocolate, Hazelnut Cream and Lemon Twist.

"Demand for polyols in sweetening applications is projected to increase 4.5 percent per year to \$527 million in 2013. Volume growth through the same period is expected to be 2.2 percent annually to 581 million pounds. Although growth for sorbitol, the largest type, is expected to be well below the average for polyols, that will be more than offset by healthy advances for second generation polyols such as erythritol and xylitol, as well as some of the smaller-volume polyols."
 --Section IV, pg. 80-1

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OTHER STUDIES

World Enzymes

This study analyzes the global enzyme industry. It presents historical demand data for the years 1998, 2003 and 2008 and forecasts for 2013 and 2018 by enzyme product (e.g., carbohydrases, proteases, polymerases and nucleases, lipases), market (e.g., industrial, specialty), world region (e.g., North America, Western Europe, Asia/Pacific) and major national market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2506 07/2009 \$5800

Waxes

Demand for waxes in the US is forecast to reach \$2.5 billion in 2013. Value gains will be based on a shift to more expensive types. Volume growth will be driven by use of waxes in building boards, coatings, adhesives, plastics and rubber. Petroleum waxes will stay the largest market but will lose share to faster growing synthetic and natural types. This study analyzes the 2.3 billion pound US wax industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.

#2456 04/2009 \$4600

Flavors & Fragrances

US flavor and fragrance demand will grow 3.7% annually through 2012. Gains will be driven by consumer interest in costlier natural and value-added ingredients, especially in cosmetics and toiletries. Growth in the addition of active ingredients with unpleasant tastes and aromas will also support the use of flavors and fragrances to mask them. This study analyzes the \$4.4 billion US flavor and fragrance industry, with forecasts for 2012 and 2017 by market and product. It also evaluates company market share and profiles major players.

#2461 01/2009 \$4700

Cosmetic & Toiletry Chemicals

US demand for cosmetic and toiletry chemicals will rise 5.8% yearly through 2012, aided in part by consumer preferences for organic and natural products. Chemicals used as active ingredients will benefit from continued gains in cosmeceutical skin care products and high value nanoscale additives. This study analyzes the \$6.6 billion US cosmetic and toiletry chemicals industry, with forecasts for 2012 and 2017 by product, function and market. It also evaluates market share and profiles industry players.

#2369 07/2008 \$4700

Food & Beverage Additives

US food and beverage additive demand will rise 4.4% annually through 2012, driven by new and improved products. The flavored water, sports drink and energy drink markets will register robust growth. Additives in dairy products will benefit from increasing use of probiotic ingredients in yogurt and other products. This study analyzes the \$7 billion US food and beverage additive industry, with forecasts for 2012 and 2017 by product and application. It also evaluates market share and profiles major producers.

#2305 03/2008 \$4500

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