

Alternative Sweeteners Market in the US

Industry Study with Forecasts for 2020

Study #3491 | February 2017 | \$4900



Several factors will benefit US demand growth for alternative sweeteners through 2020, including:

- Concerns surrounding the health impact of excess sugar in the average American diet
- Increasing numbers of individuals with diabetes and obesity, who must reduce the amount of sugar in their diets
- Wider trends in the food and beverage markets, including “all natural” and “clean label” preferences

High intensity sweeteners to remain leading type

High intensity sweeteners are projected to account for 45% of alternative sweetener sales in the US in 2020, benefiting from the widespread use of aspartame, ace-K, and sucralose in carbonated soft drinks (CSD). However, declining CSD production and consumer concerns with regards to the health impact of some high intensity sweeteners will restrain growth through 2020. Ace-K is forecast to register strong growth, as manufacturers exploit its heat stability and synergistic sweetening characteristics in sweetener blends. Sucralose will post growth, supported by continued development of new applications and a modest recovery in pricing.

Natural sweetener demand to rise

Growing consumer interest in “all natural” and “clean label” foods and beverages will drive demand for natural alternative sweeteners such as stevia and monk fruit,

which are forecast to register double-digit gains through 2020. These two products will also benefit from the continued popularity of organic and non-GMO products.

Food applications to retain market dominance

Food is expected to account for over half of the US alternative sweeteners market in 2020. This leading position results from maturity in several large applications, such as tabletop uses and candy and confections. Beverages will continue to lose share to other applications, with strong growth in other beverages not quite offsetting weakness in CSD.

Study coverage

This Freedonia industry study presents historical demand data for 2005, 2010 and 2015 plus forecasts for 2020 by product class, such as high intensity sweeteners (aspartame, sucralose, acesulfame potassium, neotame, saccharin), polyols (sorbitol, mannitol, xylitol, maltitol, erythritol, other polyols), and natural alternative types (stevia, agave nectar, monk fruit, other). Data is also provided for market segments such as food (candy and confections, tabletop sweeteners, dairy products, baked goods, snack foods, othe), beverages (CSD, others), personal care products, and pharmaceuticals. The study also analyzes company market share and provides strategic analysis on industry competitors, including Roquette America, Ingredion, Tate & Lyle, and Niutang.

ALTERNATIVE SWEETENERS

Global Sweetener Sales Trends

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- Around the world, the product mix varies considerably:
- Japan, the high intensity sweetener segment is divided among saccharin, aspartame, glycyrrhizin (derived from licorice root), stevia and ace-K
 - Western Europe’s sweetener product mix is fairly similar to that of the US, although it includes cyclamate
 - In many developing countries, saccharin holds a much stronger position than it does in the US or Western Europe

A major consideration faced by ingredient manufacturers marketing to international consumers is the difference in regulatory climates. As a result, even US-based developers will often first seek approval for their products outside the US. Later, when offshore sales have helped them recoup development costs and establish a product’s safety record, they will attempt to penetrate the lucrative US market. Especially in globalized industries like soft drinks, this approach also expedites the commercialization of new sweeteners once they have gained FDA approval. Along these same lines, patents for a product or blend may expire at different times in different countries, influencing a firm’s international marketing plans. In other instances, major producers simply adapt to

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Table 7-8 | Chewing Gum Applications Outlook for Alternative Sweeteners by Type, 2005-2020 (million dollars)

Item	2005	2010	2015	2020
Candy Alternative Sweeteners % chewing gum				
Chewing Gum Alternative Sweeteners				
High Intensity				
Polyols:				
Sorbitol				
Mannitol				
Other Polyols				
Natural				

Source: The Freedonia Group

Table 5-1 | Polyol Outlook by Product, 2005-2020 (million pounds)

Item	2005	2010	2015	2020
Alternative Sweeteners % polyol				
Polyol Demand				
Sorbitol				
Mannitol				
Xylitol				
Maltitol				
Erythritol				
Other				
\$/lb				
Polyol Demand (mil \$)				

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

The background of the top section of the page is a photograph of a person wearing a white, vertically striped button-down shirt. The person is holding a silver pen in their right hand and a white tablet computer in their left hand. They are sitting at a white desk, and a smartphone is visible on the desk to the left. The overall scene is brightly lit and professional.

The Freedonia Group

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Related Studies

Biocides Market in the US

US biocides demand will rise 3.7 percent per year to \$4.1 billion in 2020. The energy market, a key contributor to demand gains during the past decade, is expected to lessen due to a slowdown in oil and gas drilling. In other markets -- such as food and beverages and cosmetics and toiletries -- consumer preferences for "clean label" goods will fuel shifts in biocide usage. The study analyzes the \$3.4 billion US biocide industry, with forecasts for 2018 and 2023 by product, application and market. This study also evaluates company market share and lists US industry players.

#3457..... January 2017 \$5500

Natural Flavors & Fragrances

US demand for natural flavors and fragrances is projected to grow 4.0 percent per year, reaching \$2.7 billion in 2020. Essential oils and natural extracts will remain the largest natural flavor and fragrance segment, while the food market will still be the largest consumer of natural flavor and fragrance. This study reviews the \$2.2 billion US market for natural flavors and fragrances, offering forecasts for 2020 and 2025 by market and product. The study also examines industry structure and evaluates market share.

#3476..... October 2016 \$5200

World Enzymes

Global demand for enzymes is projected to grow on average 4.6 percent per annum through 2020 to \$7.2 billion. Food and beverages will remain the largest market for enzymes by value, with the most rapid growth in biocatalysts. The competitive nature of the pharmaceutical industry will lead to strong gains in specialty enzyme demand. The study details the \$5.8 billion enzyme market, offering forecasts for 2020 and 2025 for demand by type and market in 6 regions and 17 countries. The study also evaluates company market share and profiles global industry participants.

#3417..... June 2016 \$6300

World Flavors & Fragrances

Global demand for flavors and fragrances is forecast to grow 3.9 percent annually, reaching \$26.3 billion in 2020. Flavor blends will remain the largest segment, while essential oils and natural extracts will grow the fastest. The Asia/Pacific and Africa/Mideast regions will be the fastest growing markets. This study analyzes the \$21.7 billion market for world flavors and fragrances, with forecasts for 2020 and 2025 by product and market for six world regions and 20 major countries. The study also evaluates company market share and profiles industry participants.

#3397..... March 2016 \$6300

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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