

## Business Review

**Allulose, Tagatose, and Allose**

## THE NEW GENERATION OF HEALTHY SUGAR REPLACERS

2020-2025

**INTRODUCTION**

Consumers have long since sought to reduce their sugar intake, and have been seeking reduced-sugar/sugar-free products for decades. Earlier generations of sugar replacers included reduced-calorie sugars, polyols, high-intensity sweeteners, or selected soluble fibres, and, typically, combinations thereof. However, each sugar-replacement solution met with technical pitfalls, poor consumer perception, and/or limited application scope.

While conventional sugar replacers reduce negative health positioning, allulose, tagatose, and allose have emerged as the first generation of sweeteners with positive health positioning. Allulose was initially launched in Japan, and carries fat-busting, gastro-intestinal control and tooth-healthy claims. These are bulking sugars, which share many functional characteristics with conventional sugar and sugar syrups.

Until recently, the price positioning of allulose, tagatose, and allose reduced their attractiveness as sugar replacers. However, recent advances in sourcing and process technologies have aligned these sugars with other sweetener options. Crucially, allulose, tagatose, and allose are termed low/no-calorie natural sugars. This has proven popular in many food and beverage applications. The emergence of a novel coronavirus at the beginning for 2020, and the ensuing pandemic, has driven consumers' desire for natural products and ingredients—natural being synonymous with healthy in many consumers' eyes.

Allulose, tagatose, and allose are not universally permitted in food and beverage applications; for example, allulose is still undergoing novel food assessment in the EU. But, they are rapidly finding application in many regions—notably, the USA. This study serves to examine the extent to which allulose, tagatose, and allose can replace sugar from various standpoints: technical, sensorial, application, regional, legislative.

**OBJECTIVES**

The key objective of the current study is to provide a clear understanding of the business potential presented by allulose, tagatose, and allose. This will be achieved through the following sub-objectives:

- Provide historical (2010, 2015), current (2020), and future (2025) market sizes (volume and volume growth rate)
- Present evolution of current markets as a model for European market outlook
- Analyse drivers and constraints for market growth of these ingredients
- Provide an overview of the evolving technical processing of these ingredients
- Assess price evolution and price drivers
- Present an analysis of consumer trends, regulatory outlooks, competitor ingredients and application trends
- End-use feedback on awareness, use, benefit, challenges and pitfalls, and outlook for allulose, tagatose, and allose

**PRODUCTS**

Allulose, tagatose, allose. *Key focus: Allulose*

**APPLICATIONS**

Bakery, fillings (fruit and fat-based), ice cream, sugar confectionery, cereals/bars, functional foods and beverages

**MARKETS**

North America (USA, Canada, Mexico), Europe (EU27+UK+CH+NO), Japan, South Korea, Singapore, South America (focus on countries with permitted use: Chile, Colombia, Costa Rica)

**PUBLICATION**

Spring, 2021

**SUBSCRIPTION**

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