

Business Review

**Global Polyols Markets, 6<sup>th</sup> Edition**

2021 - 2026

Focus on Europe, Americas, China, APAC, ME, with RoW overview

**INTRODUCTION**

Polyols have long been used for sweetness, humectancy, bulking, texture, mouthfeel and other technical properties in food, beverage, feed, and industrial applications. Preference for polyols varies by region and demand sector. Polyols produced from starch as well as from other raw materials and fermentation are covered in this study.

The clean-label trend has gained increasing traction across the global food industry. Polyols are no exception, particularly in terms of GM perceptions, and the understanding of the clean-label trend and its impact will be a key element of this study.

The COVID-19 pandemic has had a profound impact on polyol end-users. Trade and logistics have disrupted global trade in raw materials. Crucially, consumer spending on luxury items has been depressed, with a concomitant rise in sales of commodity food and beverage products. This study will focus on the pandemic impact and outlook for the polyols markets. For example, what is the current status of Chinese production and capacity? Has the balance of Chinese production moved from speciality to commodity polyols, and how does this impact the supply market? What is the current outlook for chewing gum, and how will this affect demand for crystalline maltitol? Is sorbitol still relevant as a go-to humectant? How will functionally-related ingredients, such as allulose, impact market share for polyols in applications such as chocolate confectionery?

The pandemic has raised consumers' awareness of health and well-being, driving demand for vitamin C, oral hygiene products, and pharma products, to name but a few. This has direct impact on polyol demand, particularly sorbitol powder, which is a cost-effective component of nutritional blend products. Furthermore, the pandemic has spurred price volatility of crude oil and biodiesel, impacting demand for glycerin as a competitor ingredient of sorbitol. The study will assess the current landscape and outlook for all these factors.

Giract, the food ingredients and technology business review specialist, has a background of 50 years' research and forecasting. It has an unparalleled understanding of the dynamics of the marketplace and privileged contacts with opinion leaders worldwide. It has published several multi-client studies on polyols since 1998, the most recent edition in 2018.

**OBJECTIVES**

The overall objective is to provide a full view of the market for polyols across the world. This can be broken down into the following sub-objectives:

- To examine the trends in production, prices and producers of these ingredients
- To evaluate market trends for polyols and functionally-related ingredients
- To estimate current demand for polyols and functionally-related ingredients across regions and end-use sectors, both food and non-food
- To understand the 'why' and 'why not' concerning the use/non-use of these ingredients by key end-users in the food and non-food sectors across regions
- To forecast demand to 2025 by ingredient across end-use sectors and regions

**PRODUCTS**

Sorbitol liquid, sorbitol powder, mannitol, crystalline maltitol, liquid maltitol (HGS and HSH), isomalt, lactitol, xylitol, erythritol, allulose, tagatose, and polydextrose

**MARKETS**

Global supply and demand, with focus on Europe (EU27, UK, Switzerland, Norway), N. America (USA, Canada, Mexico), Brazil, China, APAC (India, Indonesia, Thailand), ME (UAE, KSA), RoW as an overview

**SECTORS**

Chewing gum, other confectionery, bakery, beverage, other food, oral care, skin care (sun care/sun screen included), hair care, vitamin C, pharmaceuticals, other non-food

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