

MULTICLIENT STUDY

Global Sweeteners – Supply and Demand Dynamics

2013-2020

August 2014

Products



Caloric bulk
Low-calorie bulk
High Intensity
Sweeteners

Markets

USA, EU28, China,
India & ROW
(focus on Philippines,
Saudi Arabia, Egypt,
Algeria, Turkey)

GIRACT

Geneva, Switzerland

Transnational Business Research & Consultancy

In your role as a:

❖ Producer, distributor or supplier of Sweeteners	❖ Food supplement producer
❖ Investor in the food industry	❖ Food manufacturer

Giract's unique highly successful study presents all the information & analyses you need.

- It is a **comprehensive study** on Sweeteners Supply and Demand across the globe – USA, EU28, China, India, and RoW (focus on Philippines, Saudi Arabia, Egypt, Algeria, Turkey)
- The programme was conducted by reviewing Giract's extensive in-house data initially, followed by **interviews with major players** (manufacturers/distributors) to derive real market numbers. The key element of this study is the numerous interviews with users to understand market forces driving sweeteners choice
- **Product segments covered** and analysed are Caloric bulk, Low-calorie bulk and High Intensity Sweeteners
- **In-depth analysis** of key global regions includes: Production Dynamics by Product type/Region, Demand Dynamics by Product type/Region/Sector, Macro-Economic Factors, Industry Trends, Legislation, End-use Markets, Current/Forecast Demand by Demand Sector/Product Type/Region, Prices, Product Characterization, Producer Profiles and Demand Sector Perspectives
- **A tracking** of industry trends; **identification** of market opportunities; **forecast estimates** to 2020
- **Save time and money** with the readily accessible and clearly presented key market data delivered in a searchable and printable PDF format, thus easy to incorporate to presentations, internal reports, etc. **A subscription** to the complete study includes a **presentation of the conclusions and Giract's interpretation** of the implications for the client



The demand for sweeteners is growing rapidly as the expanding middle class in the emerging economies brings a shift in consumption patterns towards more indulgence and luxury goods. At the same time, the West is facing an obesity epidemic prompting shifts in sweetener consumption patterns and sweetener choices, a phenomenon that is instantaneously transposed to the emerging economies as well. In addition to these dynamics comes the growing concern about food safety, food security and sustainability, triggering the search for more natural products and also more locally sourced products.

This has led to a flurry of new developments for alternative non-caloric bulk sweeteners, high-intensity sweeteners and bulk sweetener supply in order to meet demand, consumer preferences and policy requirements. While all this points to tremendous business opportunities, other driving forces present serious barriers. Thus, regulatory pressures impact new ingredient approvals, agricultural policies in view of trade globalization change the competitive environment for suppliers, and sustainability issues force users and producers to think more locally. Finally, the predicted boom in world sugar production has not yet materialised whereas other sweetener sources are suffering from the impact of biofuels.

Sweetener markets are therefore increasingly in flux. Major users such as Coca Cola and PepsiCo are in search of 'healthy' and 'natural' solutions which fully satisfy both technical and cost criteria. EU CAP policy is about to change the high fructose outlook and suppliers face stiffer competition from new entrants, mainly from Asia. Chinese HFS production is booming whereas USA shows important shifts in demand patterns. This report focuses on the supply and market demand dynamics for low-calorie bulk sweeteners in comparison to high intensity and caloric bulk sweeteners.

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Extensive research in the field of sweeteners has revealed how essential they are in the food and beverages industries. Modern industries have now begun to further explore and enhance the advantages and uses of sweeteners in their various products and processes. This has led to a steady market for sweeteners and has resulted in high-profile launches of many types of sweeteners. The main objective is to evaluate the market potential for selected sweeteners across the world with a focus on the major demand sectors.

Caloric bulk, Low-calorie bulk and High Intensity Sweeteners Supply and Demand



This unique study examines sweetener supply & demand globally – USA, EU28, China, India, and RoW

SCOPE

Products

- **Caloric Sweeteners** - Sucrose, glucose syrups, fructose syrups, crystalline fructose, dextrose
- **Low Calorie (Hypoglycemic) Bulk Sweeteners** - Sorbitol liquid, crystalline sorbitol, isomalt, maltitol liquid, crystalline maltitol, xylitol, erythritol
- **High Intensity Sweeteners (HIS)** - Sucralose, aspartame, acesulfame K, cyclamate, saccharin, stevia (stevioside, rebaudioside), alitame, neotame, thaumatin, neohesperidine DC

Geographical

- Global – USA, EU28, China, India, and RoW
- RoW will focus on:
 - Philippines
 - Saudi Arabia
 - Egypt
 - Algeria
 - Turkey

Markets/ End-Sectors

- Table-top, drinks (powder and liquid)
- Confectionery (including chewing gum)
- Bakery
- Dairy
- Ice cream
- Desserts
- Dry foods
- Other foods, non-food
- Industrial sweetener blends (mostly limited to Europe)

STUDY HIGHLIGHT

Programme

The dominant element of the study is interviews with key players - manufacturers/ distributors/ end users – from which a real understanding of the market will be derived

**2013-2020
(Forecast for
7 years)**

Timescale



WHAT DO YOU GET?

1. **Electronic Copy** of report in searchable PDF format
2. **One Printed Copy**
3. Report published in **August 2014**



Product type chapter will include the following tables:

1. Production scenario/Producer Share & Demand Overview – by Sugar Producer, Glucose Syrup producer, Fructose Syrup Producer, Crystalline Fructose Producer, Dextrose Producer, Sucralose Producer, Aspartame producer, Acesulfame K Producer, Cyclamate producer, Saccharin Producer, Stevia Producer, Alitame Producer, Neotame Producer, Thaumatin Producer, NHDC Producer, Liquid Sorbitol Producer, Crystalline Sorbitol producer, Isomalt Producer, Maltitol Liquid producer, Crystalline Maltitol Producer, Xylitol Producer and Erythritol Producer
2. Trade Balance – by Sugar supply balance, Glucose Syrup supply balance, Fructose Syrup supply balance, Crystalline Fructose supply balance, Dextrose supply balance, Sucralose supply balance, Aspartame supply balance, Acesulfame K supply balance, Cyclamate supply balance, Saccharin supply balance, Stevia supply balance, Alitame K supply balance, Neotame supply balance, Thaumatin supply balance, NHDC supply balance, Liquid Sorbitol supply balance, Crystalline Sorbitol supply balance, Isomalt supply balance, Maltitol Liquid supply balance, Crystalline Maltitol supply balance and Xylitol supply balance
3. Pricing Scenario – Sweeteners

Sugar supply balance	
Production	
Net imports	
Net exports	
Availability	
Crystalline Fructose supply balance	
Production	
Net imports	
Net exports	
Availability	

Sugar	
Sugars	
Glucose	
Fructose	
Crystalline Fructose	
Fructose Syrup	
Glucose Syrup	
Dextrose	
Other Products	
Other Products	
Net Imports	
Net Exports	
Total	

Pricing Scenario	
Sweeteners	
Glucose Syrup	
Fructose Syrup	
Crystalline Fructose	
Dextrose	
Sucralose	
Aspartame	
Stevia	
Alitame	
Neotame	
Thaumatin	
NHDC	
Liquid Sorbitol	
Crystalline Sorbitol	
Isomalt	
Maltitol Liquid	
Crystalline Maltitol	
Xylitol	
Erythritol	

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2. PRODUCT CHARACTERISTICS

2.1. POLYOLS

For 50 years polyols have been a shining example of a successful speciality business. Today polyols have definitely taken their place as a major component of modern food, pharmaceutical, personal care and industrial products, inevitably becoming more of a commodity. It is remarkable though that polyols have been able to delay commoditisation for such a long time by constantly innovating in new products, product properties and applications.

Since the end of the 20th century, this capacity to re-invent the market place has been slowing down considerably leading to a growing commoditisation of most polyols in many markets. Obviously this is due to the maturity that any product category reaches over time, but in the case of polyols, the process has been accelerated by a combination of factors: a systemic overcapacity in production since the late 90s, the emergence of China as a leading producer and major exporter and the extreme variability of the high raw material and energy costs. This has contributed to a climate in which producers were unable to sustain the historically high margins. With less capital available for R&D, innovation has been slowing down which led to a greater inclination to commoditisation.

The overall polyol market has become rather commoditised, the chewing gum market being the only notable exception. There have been hardly any change in the polyol range and the quality of the products offered since 2009 and also very little has been added in terms of new technical and nutritional properties they can bring. Also the range of applications has not been extended in any important way although there may be first signs of a renewed dynamic in drinks and green chemistry.

It is also clear today that the boom in polyol demand, which the global nutrition and health trend was expected to bring, is not materialising because diet and light products have not met with overall acceptance due to quality and effectiveness in weight control. When it comes to a positive health effect such as in tooth friendliness the success is much better. However traditional polyol producers have built up capacities in anticipation of this and are now left grappling with a serious capacity surplus, aggravated by the geographic shift to China. There are only few signs of improvement in demand such as a new dynamic in natural intense sweeteners which may result in new combinations with polyols and some revival of the low calorie markets of the 80s. However, these will be rather marginal increments of the market rather than strong fundamental growth and may only benefit a few special products such as xylitol, crystalline maltitol and erythritol. These three polyols appear to be at the centre of the positive dynamics in the added-value market and mostly in chewing gum applications.

3. USA – SUPPLY AND DEMAND

3.1. MAIN DRIVING FORCES

3.1.1. SOCIO-ECONOMIC FACTORS

The most relevant economic indicators for USA, together with Giract's forecasts are:

Socio-economic marker	Unit	2005	2012	2020	past	forecasts
Total GDP	bio const EUR					
Real GDP in EUR per capita const EUR/capita						
Population	mio					
Average household size	persons					
Number of households	mio					

Source: Eurostat, Tradingeconomics

The US economy is the largest and most technologically advanced economy in the world, with a per capita GDP of USD 42050 (EUR 30839) in 2012. Since 1975, practically all the gains in household income have gone to the top 20% of households. And, since 1996, dividends and capital gains have grown faster than wages or any other category of after-tax income. In the US, imported oil accounts for nearly 55% of total consumption. With prices of crude oil increasing up to twice the value of 2000, many individuals fell behind in their mortgage payments by 2006. When oil prices climbed another 50% between 2006 and 2008, bank foreclosures more than doubled in the same period.

Rising oil prices, and a collapse in the housing market, dampened economic growth, caused a drop in the value of the dollar, and a deterioration in the US trade deficit, which peaked at USD 840 bio in 2008. The sub-prime mortgage crisis, falling home prices, investment bank failures, tight credit, and the global economic downturn pushed the United States into a recession by mid-2008. GDP contracted until the third quarter of 2009, making this the deepest and longest downturn since the Great Depression.

In 2010 and 2011, the Federal budget deficit reached nearly 9% of GDP. In 2012, the Federal government reduced the growth of spending and the deficit shrank to 7.6% of GDP.

Long-term problems include stagnation of wages for lower-income families, inadequate investment in deteriorating infrastructure, rapidly rising medical and pension costs of an aging population, energy shortages, and sizable current account and budget deficits – including significant budget shortages for State governments.

Section: EU – Supply and Demand

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4.2. PRODUCTION AND SUPPLY

4.2.1.

SUGAR

Sugar Producer	Kt	Production share(%)
Agrana		
British Sugar		
Cosun		
Nordic Sugar		
Nordzucker		
Südzucker		
Tereos-Syral		
Others		
Total		

4.2.2.

STARCH SWEETENERS

Glucose syrup producer	Kt	Production share(%)
Agrana		
Cargill		
Charmor		
Hungana (T&L-Agrana)		
Jungbunzlauer		
Roquette		
Tereos-Syral		
T&L		
Others		
Total		

Section: China – Supply and Demand

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5.1.4. LEGISLATION

text to be added here

5.2. PRODUCTION AND SUPPLY

5.2.1. SUGAR

text to be added here

5.2.2. STARCH SWEETENERS

Glucose syrup producer	Kt	Production share(%)
Shandong Zhucheng Xingmao		
Shandong Luzhou		
Jilin Changchun Dacheng		
Shandong Weifang Shengtai		
Hebei Yansan Food		
Jiangsu Liangyungang /Roquette		
Shandong Runsheng (Zhucheng Stock)		
Heilongjiang COFCO Biochem		
Henan Mengzhou Golden Maize		
Others		
Total		

Fructose Syrup Producer	Kt	Production share(%)
Shandong Xiwang Group		
Shandong Zhucheng Xingmao		
Heilongjiang Asia Biochem Daqing Biochem		
Jilin Cargill Biochem		
Heilongjiang COFCO Biochem		
Jilin Changchun Dacheng		
Shandong Luzhou		
Shandong Xiangchi Jianyuan		
Shandong Tianmei (Daqing Group)		
Others		
Total		

Section: India – Supply and Demand

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6.1.4. LEGISLATION

text to be added here

6.2. PRODUCTION AND SUPPLY

6.2.1. SUGAR

India is a major producer and exporter of sugar. The manufacturing base is highly fragmented, but under strict government control. Exact volumes of manufacture and export are provided in the availability tables.

More text to be added here

6.2.2. STARCH SWEETENERS

Glucose syrup producer	Kt	Production share(%)
Sukhjit Starch Products		
Roquette Riddhi Siddhi		
Cujarat Ambuja		
Maize Prod./Sayaji Mills		
Sanstar Bio-Polymers		
Sahayadri St.& Industries		
Universal Starch		
Anil Starch Products		
Goodrich		
Others		
Total		

Dextrose Producer	Kt	Production share(%)
Roquette Riddhi Siddhi		
Cujarat Ambuja		
Sukhjit Starch Products		
Maize Prod./Sayaji Mills		
Universal Starch		
Anil Starch Products		
Tirupathi Starch Products		
Total		