

## Business Review

Market for Sweeteners in Middle-East and Central Asia  
2016 - 2021

Kingdom of Saudi Arabia, United Arab Emirates, Iran, Turkey, Egypt

**INTRODUCTION** Sweeteners have transcended their technical function, to become quasi functional ingredients now. The global preponderance to obesity, CVD and other lifestyle diseases caused by excess calories in the diet have increased the focus on the reduction of sugar and other caloric sweeteners in packaged foods and beverages. Giract has split sweeteners into three types – bulk caloric (sugar), bulk non-caloric (polyols) and high intensity sweeteners (natural and synthetic).

The Middle East and Central Asia have become a dynamic region for processed food and food ingredients. The turmoil in global oil markets affecting the economy of KSA and UAE is balanced by the opening of economies in Iran and Egypt and a strong Turkey. The Middle East is differentiated from the other countries in that it imports more than 80% of its processed food. The other countries have domestic production, at various levels of industrialization. In the future though it is expected that Iran, Egypt and Turkey will vastly industrialize. In the future though it is expected that Iran, Egypt and Turkey will vastly industrialize domestic food production whereas the Middle East will remain an importing region for processed foods.

The Middle East is facing an obesity epidemic. About 10% of the population is estimated to be obese and this number is expected to double in the next five years. The climate does not allow for outdoor activities and the affluence levels have led to an increase in calorie intake due to excess food availability. The other countries have varying degrees of prevalence of obesity. Iran started a nutritional and epidemiological transitioning process around 2005. The prevalence of urban obesity was around 15% in 2013 already. Given this scenario, it is possible that public efforts to curb this menace will first focus on reducing calories in packaged food. This will lead to a focus on fat as well as sweeteners.

**OBJECTIVES**

The overall objective is to provide a good supply/demand scenario for the various sweeteners in the Middle-East and specific countries. These are:

- Provide the industry structure, size and shape and market shares of key players in each of the chosen end-use sectors (beverages, table-top, biscuit, etc.)
- Subsequently, the ingredient market will be explored in detail with the following sub-objectives:
  - Estimate availability of the different sweeteners in the specific countries (Production + Import – export = availability) by volume in 2016, and to arrive at the value using price estimates
  - Clarify the legislative scenario in the countries covered in the scope
  - Provide a detailed picture of the demand sectors
  - Calculate demand in the different sectors of food as defined by the client
  - Forecast the demand by sector to 2021
  - Understand price and price trends, by country and sector where possible
  - Elucidate the competitive structure based on key producers and suppliers

It must be noted that outside of Turkey, there is very little production of any of the sweeteners in the selected countries.

**PRODUCTS**

Sugar, HFCS, Glucose syrup, Maltitol, Sorbitol, Erythritol, Mannitol, Xylitol, Saccharin, Aspartame, Sucralose, Acesulfame K, Stevia

**GEOGRAPHIES**

Kingdom of Saudi Arabia (KSA), United Arab Emirates (UAE), Iran, Turkey and Egypt

**SECTORS**

Table-top, Beverage, Confectionery (Chocolate, Candy and chewing gum), sweet bakery including biscuits, Ice-cream, other foods

**TIMESCALE**

Current 2016, with forecast to 2021

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