

## Business Review

**Opportunities for Sweeteners in Table-Top Sweeteners**

USA, EU28

Players, Brands, Volumes, Market Structure, Trends and Forecasts

2017 - 2022

**INTRODUCTION**

Table-top sweeteners are a convenient way of adding sweet taste to home prepared foods, most popularly for beverages. Sugar has long been the mainstay of this segment. Since the discovery of saccharin in 1878, there has been much diversity available in this segment. Today table-top sweeteners evoke only low calorie products in the minds of consumers. Aspartame, Acesulfame K, Sucralose and Steviol glycosides are today popular in many table-top products. These products are available in powder form, tablets and as single serve sachets. The convenience and health positioning of table-top sweeteners has extended their popularity to even developing countries, although the developed world still remains the major market.

Table-top sweeteners have been popular in the West over many decades. The advent of sucralose created a major change in the global table-top sweetener industry, after years of dominance by aspartame. Sucralose was developed by sugar giant Tate & Lyle and the original patents for the product date back to the mid-1970s. Tate & Lyle is responsible for the worldwide sales of sucralose to food and beverage manufacturers, while McNeil covers the table-top retail and foodservice sales of the brand Splenda. The production of sucralose alone, unlike many of the other high intensity sweeteners is still dominated by western manufacturers. HIS manufacture has largely moved to china, which has also become a significant consumer.

Stevia based table-top sweeteners are currently the rage. Approvals for use opened the floodgates for various formulations, of which the stevia + erythritol combination (Truvia® and PureVia®) has been the most acceptable. Luo Han Guo is rapidly arriving on the horizon as a competitor. Allulose works best in combination with these HIS and is soon expected to be a component of popular formulations.

To track the rapid changes occurring in this market, Giract has launched the table-top sweetener market study. The earlier stand-alone edition was published in 2008, followed by highly successful studies covering various sweetener ingredients over the years (with table-top sweeteners as a demand sector).

**OBJECTIVES**

The objectives of this report are:

- To estimate value and volume sales, market shares and trends in table-top sweeteners along with other related issues such as product formats, pack sizes and unit prices
- To examine producers of table-top sweeteners (including private label), their market shares and their special strengths in this sector
- To forecast demand to 2022 for currently available table-top sweetener products

**PRODUCTS**

Table-top sweeteners split by powder, tablet, sachet and liquid formats. Sugar use as a table-top sweetener is included in the analysis. Volumes of all major sweetener ingredients used in this sector will be provided.

**MARKETS**

USA and EU28

**TIMESCALE**

Current 2017 with forecast to 2022

**SUBSCRIPTION**

EUR 19450

**PROGRAMME**

Following an initial review of Giract's extensive in-house data and secondary-source databases, discussions will be held with selected producers and industry in order to derive real understanding of the complex market structure for table-top sweetener products in the European Union and USA.

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