

Survey of HIS in China

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Abstracts

There are nine commonly used high intensity sweeteners (HIS) in Asia Pacific area, which are saccharin, cyclamate, acesulfame-K, stevia sweetener, aspartame, sucralose, glycyrrhizin, alitame and neotame. All of them are at least 30 times sweeter than sucrose, among which neotame has the highest sweetness: 8,000 times. Stevia sweetener and glycyrrhizin are natural, while the rest are artificial.

These HIS can be grouped into generations according to their history of usage. Among the different opinions on how they are grouped, there is a popular one: the first generation is cyclamate, glycyrrhizin and saccharin, since they have long been used by human beings; the second generation is acesulfame-K and aspartame; the third generation includes alitame, neotame, sucralose and stevia sweetener.

Industrial affairs

In the past decade, global consumption volume of HIS has been growing at a CAGR of around 4%, which is much faster than that of the global sugar market due to multiple factors including economic growth, price increase of sugar, increasingly competitive price of HIS, rising demand for low-calorie diet given the increasingly severe obesity and diabetes across the world, etc.

Sucralose and stevia sweetener, as the new generation HIS, have witnessed the fastest growth in the past decade globally, especially sucralose, whose market has been exploding in the past three to four years, with Chinese producers keeping on launching new capacities, thus driving down its price considerably in the global market. The global sucralose market has outpaced stevia sweetener by 2012, and its share is predicted to continue expand.

Market growth of stevia sweetener in the world is mainly driven by its approval in the US

and Europe, which have become the fastest growing market of stevia sweetener.

Older generation HIS, cyclamate, acesulfame-K and aspartame, have also witnessed remarkable growth, while saccharin, the oldest HIS, has seen a declining market both by consumption volume and by market share, although its market remains the largest as of 2013 by sugar equivalent consumption volume. The saccharin market shrink is caused by many factors, including people's concern on the product's safety, declined supply from China, which is the leading supplier, because of pollution in its production and competition from new sweeteners.

Asia Pacific position

Asia Pacific, with China, India and Indonesia, ranking first, second and fourth in terms of population worldwide located in this region, is an important consumption region of HIS in the world, taking up about 50% by consumption in the global market. It is much more important as a supplier, providing more than 80% of the world's HIS output.

Purpose of report: Provide the latest information on HIS' development in Asia Pacific region in the past three years from 2011.

Applicable user

Manufacturers to enter Asia Pacific sugar and sweetener market or produce sugar and sweeteners permitted to be used in the region

Investors planning to invest in Asia Pacific sugar and sweetener industry

Analysts, consultants or research institutes trying to gain insight into the world's fast-growing market of sugar and sweeteners

Raw material suppliers

Trading companies targeting Asia Pacific sugar and sweetener market

Distributors wishing to keep up with the trend of China's sugar and sweetener market

Equipment suppliers targeting Asia Pacific with high-quality production and

processing machinery and lines, and testing and quality control systems

What to report

Survey of High Intensity Sweeteners in Asia Pacific - 2nd Edition covers the following aspects:

Overview of global high intensity sweetener market

Key factors influencing Asia Pacific high intensity sweetener market, including approval status for HIS, anti-dumping cases and intellectual property protection, macro factors like macro economy and demography, competitive products (sugar and starch sugar), as well as eating habit in different countries in this region

High intensity sweeteners in major countries and regions of Asia Pacific, from perspective of production, consumption and trade, as well as drivers and barriers to development and forecast on demand to 2018

Market breakdown of high intensity sweeteners by country and product, from output and consumption by volume and value

Profile of leading players and end-users

Forecast on industry

Asia Pacific market of high intensity sweeteners will continue to grow in the coming years. Its demand and dominant role in supply, especially, will maintain.

Value to client

Through the report, you can better understand the market and find opportunities in this market by finding answers to the following questions:

What are the major production countries of high intensity sweeteners in Asia Pacific? What are the major products they supply? How has their supply changed in the past three years?

What are the major consumption markets in Asia Pacific region? What are the popular

products in each major market and how the difference occurs? What are the market sizes of each country by product and in total in the past three years? What factors have influenced and will continue to influence their consumption? How will these factors change in the coming years?

Besides, among all the nine HIS, which products are growing robustly, which are witnessing stable growth, and which are facing a static and even declining market in the whole region and in each major country, in supply and consumption volume in the past years?

Methodology

Desk research

Questionnaire survey

Telephone interview

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COMPANIES MENTIONED

Henan Kaifeng Xinghua Fine Chemical Factory, Jintian Enterprise (Nanjing) Co., Ltd., Suzhou Hope Technology Co., Ltd., Jiangsu SinoSweet Co., Ltd., PureCircle (Jiangxi) Co., Ltd., JK Sucralose Inc.
Shanghai Fanzhi Pharmacy Co., Ltd.

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