

Alternative Sweeteners – A Global Market Overview

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Abstracts

Increased consumer awareness about obesity, diabetes and other health concerns have paved the way for the consumption and usage of alternative sweeteners worldwide. Alternative sweeteners are used as substitute to sugar in foods and beverages to personal care to pharmaceuticals as they contain low to zero calories thus reducing the risk of obesity and diabetes. Alternative sweeteners analyzed in this report include high intensity sweeteners and polyols (also called as sugar alcohols).

Alternative sweeteners' demand is anticipated to increase in the coming years is also buoyed by approvals of high intensity sweeteners and polyols in food and beverage applications by majority of the countries across the globe. Most of the alternative sweeteners are approved in North America, Europe and Asia-Pacific while very few of them are either banned or approved for restricted usage.

This report analyzes the alternative sweeteners global markets including North America, Europe, Asia-Pacific and Rest of World in terms of both volume in metric tons and value in USD for the 2014-2022 analysis period. The regional markets further analyzed for 13 independent countries across North America - the United States, Canada and Mexico; Europe - France, Germany, Italy, Spain, the United Kingdom and Russia; Asia-Pacific - China, India, Japan and South Korea; and Rest of World - South America, Middle East & Africa and CIS Countries (Excl. Russia). The market is analyzed in all of these major regions by alternative sweeteners product category (HIS and Polyols), key countries and by major end-use applications in terms of both volume and value. This report also explores the market by product category and major application sector for each major country. The global key market trends are illustrated along with the recent major business trends such as product innovations/launches, mergers and acquisitions etc.

Polyols dominate the global market for Alternative Sweeteners by product category, forecast to be 1.6 million metric tons in 2017 accounting for over 90%, which is

projected to reach 1.9 million metric tons by 2022 growing at a CAGR of 3.4% between the two years. High Intensity Sweeteners accounts for the remaining market share of Alternative Sweeteners and expected to witness the growth rate of 3% during the same period.

High intensity sweeteners (HIS) analyzed in this global market report is segmented by HIS category - Artificial HIS and Natural HIS. These HIS categories further segmented in to Artificial HIS - Acesulfame-K, Aspartame, Cyclamate, Neotame, Saccharin and Sucralose; and Natural HIS - Steviol Glycosides (stevia extracts), Glycyrrhizin (licorice root extracts) and Mogroside V (monk fruit extracts). The study also explores the key end-use applications of high intensity sweeteners including Beverages, Confectionary, Foods, Tabletop and Others (personal care, pharmaceuticals and nutraceuticals etc.).

Polyols analyzed in this report comprise sorbitol, xylitol, mannitol, maltitol, erythritol, isomalt and lactitol. The polyols' end-use application markets analyzed include Confectionary, Food & Beverages, Personal Care and Others (Pharmaceuticals and nutraceuticals). Sorbitol market estimated in this report does not include sorbitol used as an intermediate in manufacturing Vitamin C.

This 452 page global alternative sweeteners market report comprises 417 charts (includes a data table and graphical representation for each chart), supported with meaningful and easy to understand graphical presentation, of market numbers. The study discusses the regulatory framework of polyols and high intense sweeteners market in all major regions of the world. This report profiles 39 global players and 135 overall major players across North America - 25; Europe - 13; Asia-Pacific - 95; and Rest of World - 2. The research also provides the listing of the companies engaged in manufacturing and supply of alternative sweeteners. The global list of companies covers the address, contact numbers and the website addresses of 260 companies.

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Anhui Jinhe Industrial Co., Ltd. (China)

Archer Daniels Midland Company (United States)

B Food Science Co., Ltd. (Japan)

Beijing Vitasweet Co., Ltd. (China)

BNEO GmbH (Germany)

Cargill, Inc (United States)
Celanese Corporation (United States)
Changzhou Niutang Chemical Plant Co., Ltd. (China)
Dupont Nutrition & Health (Danisco)
Gansu Fanzhi Biotech Co., Ltd. (China)
GLG Life Tech Corporation (Canada)
Golden Time Chemical (Jiangsu) Co., Ltd. (China)
Guilin GFS Monk Fruit Corp. (China)
Hill Pharmaceutical Co., Ltd. (China)
Ingredion Incorporated (United States)
Jiangsu SinoSweet Co., Ltd. (China)
JK Sucralose, Inc. (China)
Jungbunzlauer Suisse AG (Switzerland)
Kaifeng Xinghua Fine Chemical Ltd. (China)
MAFCO Worldwide LLC (United States)
Merisant Company (United States)
Mitsubishi Shoji Foodtech Co., Ltd. (Japan)
Mitsubishi-Kagaku Foods Corporation (Japan)
Morita Kagaku Kogyo Co., Ltd. (Japan)
NutraSweet Company (United States)
PMC Specialties Group, Inc (United States)
PureCircle Limited (Malaysia)
Roquette Freres S.A. (France)
Shandong Futaste Co., Ltd. (China)
Shandong Longlive Bio-Technology Co., Ltd. (China)
Shandong Tianli Pharmaceutical Co., Ltd. (China)
Suzhou Hope Technology Co., Ltd. (China)
Tate & Lyle PLC (United Kingdom)
Tereos Starch & Sweeteners s.a.s. (Tereos Syral) (France)
Tianjin North Food Co., Ltd. (China)
Wuhan Huasweet Co., Ltd. (China)
Zhejiang Sanhe Food Science & Technology Co., Ltd. (China)
Zhong Hua Fang Da (H.K.) Limited (Hong Kong)

5. KEY BUSINESS AND PRODUCT TRENDS

PureCircle Doubled Stevia Leaf Extract Production Capacity in Malaysia

Commercialization of SweeGen's Bestevia Reb-M

Product of the Year in the Sweetener Category for 2017 Won by SPLENDA Naturals

Stevia Sweetener

Evolva to Introduce EverSweet in 2018

US Customs and Border Protection Issue Clearance for PureCircle Shipments

S&W's Unique Stevia Lines Marketed Under the Brand Name 'Kandi Leaf' Stevia

US Notice of Allowance for a Crucial Evolva Patent Protection Application Related to Steviol Glycosides Production

Ingredion, Only Global Distributor of SweeGen's Stevia Sweeteners in All Markets except China

Sigma-Beverage, PureCircle's Latest Breakthrough Stevia Ingredient for Beverage Formulations

DSM Submitted Application to Food Safety Regulators in Europe for Approving the Use of its Fermentation-based Stevia in The Netherlands

S2G Biochemicals and Mondelez International Collaborated to Build Xylitol Plant in the USA

Haigen Collaborated with Viachem to Introduce its Stevia Products to the North American Market

Updated European Commission Legislation Opened Door for European Food and Beverage Companies Needing Low-Calorie, Best-Tasting Sweeteners

GLG's EMS95 Received Letter of No Objection from the US FDA

GLG Produced New Reb C Varietal with Unprecedented Levels of Reb C at Over 79%

Jinhe Industrial Invested 460 Million Yuan for Constructing a New 1,500 Mt/Yr Sucralose Project

Unveiling of Zevia's New Non-GMO Project Verified Stevia Blend

Saccharin Received Approval from the Canadian Government

Anti-Caries Effect of Xylitol Confirmed by DuPont Study

DFI Corp and Mitr Phol Group Inks Strategic Investment and Partnership Deal to Produce Erythritol and Xylitol

Cargill's EverSweet Sweetener Received Letter of No Objection from US FDA

Xylitol Sweetener Can Kill or Poison Dogs - FDA Warns

PureCircle Stevia Agronomy Program in India

New Stevia Leaf Seedling with Over 1000% Rise in Reb M Glycosides Produced by GLG

BNEO Introduces New Isomalt Translucent Gum Coating Technology

New Decree Passed in Brazil Allow Beverage Producers to Use a Mix of Stevia and Sugar

GLG Join Forces with MycoTech to Enhance the Taste of Natural Sweeteners

EFSA Approves the Use of PureCircle's Reb M as a Stevia Sweetener in Europe

Launch of PureCircle's Zeta Family of Stevia Ingredients

USPTO Issues New Reb D Stevia Glycoside Patent to Sweet Green Fields

Sweet Green Fields Co., Ltd., One of the World's Largest, Privately Held, and Fully-Integrated Stevia Ingredient Companies

European Commission Approves Usage of Erythritol in Beverages

GLG's New Stevia Leaf with Enhanced Levels of Reb D and Reb M

Acquisition of Johnson & Johnson's Splenda Brand Complements Heartland's Product Line

GLG's Natural Zero-Calorie Sweetener Product Line Receives Non-GMO Project Verification

HYET Purchased ASE from Ajinomoto Co.

Launch of Cargill's New Truvia Brown Sugar Blend in Canada

New Sugar Substitute, ERYLITE Bronze Launched by Jungbunzlauer

Launch of Cargill's New Truvia Brown Sugar Blend in Canada

DOLCIA PRIMA Low-Calorie Sugar Unveiled by Tate & Lyle

US FDA Issued Letter of No Objection for GLG's High-Purity Reb C Blends

BENEO Presents New Sugar-free Hard Candy Solutions at ISM 2015

DOLCIA PRIMA Low-Calorie Sugar Unveiled by Tate & Lyle

US FDA Issued Letter of No Objection for GLG's High-Purity Reb C Blends

Production of NutraSweet Aspartame to Stop by the end of 2014

Study Reveals Zerose Erythritol Tastes Great and Better for Teeth

Merisant and Whole Earth to Pay \$1.65 M and Overhaul its Pure Via Label

Cargill and Evolva Announce Publication of Patent Application on the Process of Fermentation-based Steviol Glycosides

Unique Fermentation-based Sweetener Platform Announced by DSM at the International Food Technology Expo in New Orleans

GLG's Rebsweet and AnySweetPLUS Stevia Extracts Received GRAS Letter of No Objection from US FDA

Reapproval of Saccharin as a Food Additive in Canada

GLG Submitted a GRAS Notification with US FDA for its High Purity Reb M Stevia Extract

Unveiling of Tate & Lyle's TASTEVA Stevia Sweetener at Engredea Trade Show in Anaheim

Kasyap Sweeteners Limited, India Expands Sorbitol Capacity

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 - Archer Daniels Midland Company (United States)
 - Arnhem Group, The (United States)
 - Cargill, Inc (United States)
 - Celanese Corporation (United States)
 - Cumberland Packing Corporation (United States)
 - DFI Corporation (United States)
 - Dupont Nutrition & Health (Danisco) (United States)

GLG Life Tech Corporation (Canada)
Heartland Food Products Group (United States)
Ingredion Incorporated (United States)
MAFCO Worldwide LLC (United States)
Merisant Company (United States)
Whole Earth Sweetener Co. (United States)
Novagreen Inc. (Canada)
NutraSweet Company (United States)
PMC Specialties Group, Inc (United States)
Pyure Brands LLC (United States)
S2G Biochem, Inc (Canada)
Sugar Foods Corporation (United States)
Sweegen, Inc. (United States)
Sweet Green Fields LLC (United States)
Wisdom Natural Brands (United American Industries, Inc.) (United States)
Xylitol Canada, Inc. (Canada)
Zuchem Inc. (United States)

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BENEO GmbH (Germany)

DHW Deutsche Hydrierwerke GmbH (Germany)

Evolva SA (Switzerland)

Extraits Végétaux et Derivés (EVD) (France)

Granular AB (DBA The Real Stevia Company) (Sweden)

Hermes Sweeteners Ltd. (Switzerland)

HYET Sweet B.V. (Netherlands)

Jungbunzlauer Suisse AG (Switzerland)

Productos Aditivos S.A. (Spain)

Roquette Frères S.A. (France)

Stevia Natura SAS (France)

Tate & Lyle PLC (United Kingdom)

Tereos Starch & Sweeteners S.A.S. (Tereos Syral) (France)

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3.3 Major Market Players

Ajinomoto Co., Inc. (Japan)

Almendra (Thailand) Ltd. (Thailand)

Anhui Jinhe Industrial Co., Ltd. (China)

B Food Science Co., Ltd. (Japan)

Baolingbao Biology Co. Ltd (china)

Beijing Gingko Group (China)

Beijing Vitasweet Co., Ltd. (China)

BioPlus Life Sciences Pvt Ltd (India)

Changmao Biochemical Engineering Co., Ltd (China)

Changzhou Guanghui Biotechnology Co., Ltd. (China)

Changzhou Niutang Chemical Plant Co., Ltd. (China)

Chengdu Wagott Pharmaceutical Co., Ltd. (China)

China Chem Source (HK) Co., Ltd. (China)

CSPC Shengxue Glucose Co., Ltd. (China)
Daepyung Co., Ltd (South Korea)
Daesang Corporation (South Korea)
Ecogreen Oleochemicals (Singapore) Pte., Ltd. (Singapore)
EPC Natural Products Co., Ltd. (China)
Gansu Fanzhi Biotech Co., Ltd. (China)
Golden Time Chemical (Jiangsu) Co., Ltd. (China)
Guangxi Khalista (Liuzhou) Chemical Industries Ltd. (China)
Guilin GFS Monk Fruit Corp. (China)
Guilin Layn Natural Ingredients Corp. (China)
Gulshan Polyols Limited (India)
Hebei Huaxu Pharmaceutical Co., Ltd. (China)
Hill Pharmaceutical Co., Ltd. (China)
Ikeda Tohka Industries Co., Ltd. (Japan)
Jiangsu Jubang Pharmaceutical Co., Ltd (China)
Jiangsu SinoSweet Co., Ltd. (China)
Jiangsu Suzhou Peacock Food Additive Co., Ltd (China)
Jinan Prosweet Biotechnology Co., Ltd (China)
Jining Aoxing Stevia Products Co., Ltd (China)
Jinyao Ruida (Xuchang) Biology Technology Co., Ltd. (China)
JK Sucralose, Inc. (China)
JMC Corporation (South Korea)
Kaifeng Xinghua Fine Chemical Ltd. (China)
Kasyap Sweeteners Ltd. (India)
Luzhou Bio-Chem Technology Co., Ltd (China)
Maize Products Ltd. (India)
Maruzen Pharmaceuticals Co., Ltd. (Japan)
MC-Towa International Sweeteners Co., Ltd. (Thailand)
Mitsubishi Shoji Foodtech Co., Ltd. (Japan)
Mitsubishi-Kagaku Foods Corporation (Japan)
Morita Kagaku Kogyo Co., Ltd. (Japan)
NichinohSeiken Co., Ltd. (Japan)
Nippon Paper Industries Co., Ltd. (Japan)
O'Laughlin Industries Co., Ltd. (Hong Kong)
PT. Batang Alum Industrie (Indonesia)
PT. Chemical Industry Tonggorejo (Indonesia)
PT. Golden Sari (Indonesia)
PT. Sorini Towa Berlian Corporindo (Indonesia)
PureCircle Limited (Malaysia)

Qualipride International Ltd. (China)
Qufu Xiangzhou Stevia Products Co., Ltd (China)
Salvi Chemical Industries Ltd. (India)
Shandong (Binzhou) Sanyuan Biotechnology Co., Ltd. (China)
Shandong Bailong Chuangyuan Bio-Tech Co., Ltd. (China)
Shandong Fullsail Biotechnology Co. Ltd. (China)
Shandong Futaste Co., Ltd. (China)
Shandong Haigen Biotechnology Co., Ltd. (China)
Shandong Huaxian Stevia Co., Ltd. (China)
Shandong Jinshunda Group Co. Ltd (China)
Shandong Kanbo Biochemical Technology Co., Ltd (China)
Shandong Longlive Bio-Technology Co., Ltd. (China)
Shandong Lujian Biological Technology Co. Ltd. (China)
Shandong Minghui Food Co., Ltd. (China)
Shandong Tianli Pharmaceutical Co., Ltd. (China)
Shouguang Tianwei Chemicals Co., Ltd (China)
Shanghai Fanzhi Pharmaceutical Co., Ltd. (China)
Shanghai Fortune Chemical Co., Ltd. (China)
Shaoxing Yamei Biotechnology Co., Ltd. (China)
Shenzhen Newtrend International Co., Ltd. (China)
Shree Vardayini Chemical Industries Pvt. Ltd (India)
Sukhjit Starch & Chemicals Ltd. (India)
Sunwin Stevia International, Inc. (China)
Suzhou Hope Technology Co., Ltd. (China)
Techno (Fujian) Food Ingredients Co., Ltd. (China)
Thomson Biotech (Xiamen) Co., Ltd. (China)
Tianjin Changjie Chemical Co., Ltd. (China)
Tianjin North Food Co., Ltd. (China)
Tokiwa Phytochemical Co., Ltd. (Japan)
Toyo Sugar Refining Co., Ltd. (Japan)
Triveni Chemicals (India)
Tsuruya Chemical Industries Co., Ltd. (Japan)
Unisweet (Shandong) Sucralose Manufacturing Co., Ltd. (China)
Vishnu Chemicals Limited (India)
Wuhan Huasweet Co., Ltd. (China)
Xinghua GL Stevia Co., Ltd. (China)
ZFTZ Mafco Biotech Co., Ltd. (China)
Zhejiang Huakang Pharmaceutical Co., Ltd. (China)
Zhejiang Sanhe Food Science & Technology Co., Ltd. (China)

Zhong Hua Fang Da (H.K.) Limited (Hong Kong)
Zhucheng Dongxiao Biotechnology Co., Ltd. (China)
Zhucheng Haotian Pharm Co., Ltd. (China)
Zibo Zhongshi Green Biotech Co., Ltd. (China)

3.4 Country-wise Analysis of Asia-Pacific Alternative Sweeteners Market

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