

High-Fructose Corn Syrup Market - Forecasts from 2020 to 2025

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Abstracts

High Fructose Corn Syrup (HFCS) market is valued at US\$9,366.056 million in 2019. It is known as a sweetener that is formed from a corn starch. The starch is converted into glucose in the production process by enzymes. The glucose is then processed more to make fructose. It is similar to sucrose that is also known as high level sugar. HFCS is known for its sweetening applications in the food and beverage industry. In the recent years, pharmaceuticals companies have also spent a substantial sum of capital into the R&D of HFCS based applications. HFCS is one of the most flexible products on the market. It is used in the maintenance of color, quality and enhances the flavor and taste in various foods and beverage products. It is affordable and is easily available in the market. The average price of HFCS is lesser than any other sweetener available in the market such as glucose. According to the NECG analysis, HFCS costs in soft drinks is half of what the sugar sweetener costs. This allows the food and beverage manufacturers to earn more profits or invest more in the enhancement of the product. Companies and manufacturers are competing against each other to develop and enhance the quality of the product. They are investing a significant capital in innovation, development and patent of the product. In 2017, Japan Corn Starch Co., Ltd, one of the major companies for HFCS in the market, announces that they have developed a new product which is known as "HFCS 70" that ensures the soft drinks maintains the sweetness of fructose and the body will maintain the same composition as that of liquid sugar. The product is registered as a patent. Other companies have also done a substantial number of innovations in the fragmented fructose market. HFCS has become an imperative part of the bakery and beverage segment. It is used for stabilizing the food and beverage products and surges the longevity of a specific product. It maintains the texture and color and gives freshness to the food that the consumer uses. Competitive Prices have a significant value in the growth of the market. With the favorable export and import tariffs worldwide has a positive effect on the

market. According to the EWG Farm Subsidy Record from 1995 to 2019, subsidies totaled USD 113.9 billion in the United States. Companies from pharmaceuticals have also made considerable developments. A French Company named Roquette Freres, has made HI-SWEET 55 Corn Syrup that is used as an oral syrup. HFCS 42 sugar is widely used in the beverage industry, processed foods, confectionary and dairy industry. It has a 42% of fructose syrup. When it is refined more and blend with the iron exchange column, HFCS 55 is produced.

North America holds a significant share in the market. United states have a major share in the market. According to the data produced by USDA, United States produced around 8.3 million tons of HFCS sugar with a decline by 12% since 1999. The major reason is because of the availability of natural sweeteners and substitutes. The surge in the production of Ethanol has also made a negative impact on the production of sweeteners. The production of corn is around 460 to 520 million bushels since 2010. HFCS accounts for 6% of the total production. HFCS 42 holds major share in the market due to its use in the baked, processed and beverage products. HFCS 55 also holds a decent share because of its use as a sweetener in the soft drinks. HFCS 70 is used in the jellies. HFCS 90 is considered as a niche segment and is mainly used with HFCS 42. According to the United States International trade commission, 73,330 MT of HFCS was exported in the year 2017, of which 69,955 MT of HFCS-55 and 3,375 MT of HFCS-42 was the breakup. 2018 had registered a better growth as the total exports were around 50,570 MT, a surge of 12% from the previous year. Europe also holds a significant share in the market and is a major producer of corn and sweetener-based products. The total production of corn starch was around 4.42 Million MT in 2018 with a significant surge in the production from the year 2014, which was 3.89 million MT. The data was provided by the European Starch Industry Association. The surge in the demand has led to the innovation and enhancement of the product by the manufacturers and producers. Governments worldwide provide various incentives and subsidies to support their nation's growth. A major company in HFCS industry opened a novel corn starch plant with a total investment of around EUR 80 million in Austria. With the strategic investments, the demand for the product has surged. According to the FAO and OECD data, the production by volume surged from 600,000 tons in 2017 to 675,0000 million tons in 2019 in the European Union. This has led to the investments, collaborations and acquisitions of various brands worldwide. Ingredient Inc. one of the major players in the market. invest around USD 30 million into their manufacturing plant in San Juan del Rio, Mexico, to scale up the production of HFCS. The plant manufactures adhesives, glucose starches and HFCS. Asia Pacific region will generate a significant growth with India, China and Japan being the major players in the region. Japan has a significant share in the market with the presence of major HFCS

corporation in the country. Coca Cola beverages contains HFCS and is widely popular in the countries such as India and China. The surge in the consumption of carbonated drinks will have a positive impact on the growth. According to the USDA, Japan has imposed tariffs on the HFCS Imports, and has scaled up its domestics manufacturing. The prices of sugar in Japan has surged which led to the demand of HFCS.

There are some limitations and challenges in the market. The overconsumption of fructose has various health effects and implications. It causes obesity, has negative effect on blood pressure and has liver effects. With the consumers awareness and preferences, natural sugars are becoming a substitute for the HFCS. In 2016. Mc Donald replaced HFCS with table sugar in their burgers and buns. Various companies are using conventional sugar as a re-placement for HFCS. There is a variation and the difference of taste between the table sugar and HFCS. Some Countries use table sugars in their soft drinks and beverages, which has a negative impact on the Corn syrup market. It is also harmful for the beekeeping as it releases toxic comports such as hydroxymethylfurfural when heated at a certain temperature.

Segmentation

By Type

HFCS 42

HFCS 55

Others

By Applications

Food and Beverages

Pharmaceuticals

Animal Feed

Others

By Distribution Channel

Offline

Online

By Geography

North America

USA

Canada

Mexico

South America

Brazil

Argentina

Others

Europe

Germany

France

United Kingdom

Italy

Others

The Middle East and Africa

UAE

Turkey

Israel

South Africa

Others

Asia Pacific Region

China

India

Japan

Australia

Others

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- 10.9. Ingredion Incorporated
- 10.10. Roquette

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