Table-top Sweetener Ingredients Key Global Markets 2018—2022—2027

MULTICLIENT STUDY PROPOSAL

2022

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by

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1. OBJECTIVES

The objective of this study is to present a clear and comprehensive understanding of the current and forecast demand for table-top sweetener ingredients. For each country within scope, the following historical (2018), current (2022), and forecast (2027) data will be presented:

- Identify the 10 top table-top sweetener brands and their manufacturers (or all major brands and manufacturers where fewer), as well as location of manufacture
- Provide table-top sweetener (end-product) volumes by product type
- Present table-top sweetener ingredient volumes by end-product type
- Split table-top sweetener product type by retail, online, and food service sales channels
- Establish table-top sweetener ingredient demand and forecast volumes
- Provide indicative prices for table-top sweetener ingredients
- Present table-top sweetener ingredient demand and forecast values
- These data will be presented as a report comprising tables and key trends. Examples of data tables are presented in the Annex to this proposal.

2. SCOPE AND METHODOLOGY

2.1. INGREDIENTS

Ingredients widely-used in table-top sweeteners. These include, but are not limited to:

- Sucrose
- Glucose
- Dextrose
- Fructose
- Crystalline fructose
- Agave syrup
- Sorbitol (liquid and powder)
- Maltitol (liquid and crystalline)
- Isomalt
- Lactitol
- Xylitol
- Erythritol
- Allulose
- Sucralose
- Aspartame
- Acesulphame K
- Cyclamate
- Saccharin
- Stevia
- Thaumatin
- Maltodextrin
- Other carrier/bulking ingredients where used

Not all ingredients will be relevant for all regions

2.2. DEMAND SECTORS

Table-top sweeteners:

- Powder/Crystals
- Tablet
- Liquid

NB. Table-top sweeteners includes zero/low-calorie sugar alternatives, as well as reduced-calorie sugar blend products. Top line data will also be presented for sucrose use as a table-top product

2.3. GEOGRAPHICAL REGION

- Europe: EU27+NO+CH, UK
- North America: USA, Canada, Mexico
- South America: Brazil, Argentina, Colombia, Ecuador, Peru
- APAC: India, China*, Thailand, Indonesia, Vietnam, Australia, New Zealand)
- Middle East: Turkey, Saudi Arabia, UAE, Israel
- Africa: South Africa, Nigeria, Kenya, Morocco, Algeria, Egypt

UK will be treated as a standalone country within Europe

It is noted that Europe, Middle East, and South Africa are the priority countries

****Due to the uncertainty surrounding China's Covid-19 lock-down status, data for China may be delivered after the anticipated deadline.***

2.4. TIMELINE

- Historical: 2018
- Current: 2022
- Forecast: 2027

2.5. METHODOLOGY

Following an evaluation of Giract's comprehensive in-house databases and information concerning table-top sweeteners, work will continue by an examination of a broad range of secondary sources, including, but not limited to, public and private sector manufacturer/processor databases, trade databases, consumer product associations, boards, federations, etc., consumer product databases, national statistical offices, and foreign trade statistics sources, where relevant.

These sources alone will be insufficient to provide suitably deep coverage across all countries, and so interviews will be conducted with industry experts, manufacturers, processors, traders/distributors, agricultural associations, boards, federations, etc., where required. These interviews will not be presented as part of the study; the information obtained will be presented therein. Where this information cannot be supplemented fully with industry expert interviews, Giract will present estimates. The methodology and assumptions on which they are derived will be explained.

3. REPORT/FORMAT/TIMING/BUDGET

3.1. REPORT FORMAT

The report will be presented as a Word document in searchable PDF format.

3.2. TIMING

An elapsed time of 12 weeks is required for fulfilling this project from the date of signing the contract. Interim project meetings will be held at mutually-convenient times—typically, on a monthly basis.

3.3. BUDGET

The project can be accomplished within a budget of **EUR #####.**

A presentation of the study will be delivered following submission of the report. There is no time cost for the preparation of this presentation.

4. GIRACT TEAM

The Giract research team calls on 50 years of research experience in the ingredients and end-product markets, together with a wide range of multi-client and proprietary studies in all the major categories of food ingredients. The Giract research team includes:

Dr. Velamur Krishnakumar: B.Tech (Chem), MBA, Dipl. Computer Science, PhD in Management Science: Managing Director of Giract. Krishna's early work experience was in consumer marketing – first in McCann Erickson Advertising and later as Product Manager at what is currently known as GlaxoSmithKline. He then joined Giract in Geneva, Switzerland where he is currently the Managing Director. Krishna has published many articles on food ingredients and has addressed various International Conferences. He is a Professional Member of the IFT and has chaired the Vitafoods Conference over many years. With a vast experience in international food and food ingredient markets, he has managed numerous strategic and operational projects across almost all ingredient sectors. He also chaired many other ingredient conferences including omega 3, fibres, probiotics, etc.

Dr. Graham C. Robinson: PhD Biochemistry (Cambridge, UK). Graham has spent 10 years working in research laboratories, first in Norwich and then in Cambridge in the UK, as well as Geneva, Switzerland. He is a specialist in fermentation technology, bioreactors, and microbial production methods, and has substantial experience of small-molecule production, processing, and purification techniques. He joined Giract in 2017, in order to bring his technical expertise to the world of technical ingredients.

Dr. Kaushik Ramakrishnan Shankar: PhD Biotechnology. Kaushik has taught courses in sensory analysis of foods, practical food analysis, and Intellectual property at Anna University, Chennai. He began his professional career with PR Biotech, a start-up manufacturing Stevia based sweeteners, where he was responsible for product formulation and start-up of the production unit. Kaushik moved on to Frost and Sullivan in 2009 where he analysed global markets for food and beverage ingredients. He joined Giract as an analyst in 2012.

Dr. Russell Ward: PhD Surface Chemistry (Bristol, UK). After post-doctoral research at CNRS in France, his career in consumer products began with Unilever. For Benckiser he was responsible for launching detergent products in Hungary, Romania and China. Russell worked for Danone as Development Director Dairy – Central & Eastern Europe and for Sara Lee as VP R&D Coffee & Tea. In 2008, he established his own consultancy and, as an Associate to Giract, has been responsible for Giract's GiTEx events and contributed to studies on soluble fibres, infant formula, bakery enzymes and protein ingredients. He joined Giract as Consultant – Research and Marketing Director in January 2012, and is now a Partner of the company.

5. ANNEX

Sample tables are presented below. These serve to illustrate the type of information that will be obtained and presented in the report. The report will also contain information on table-top sweetener brands and manufacturers, as well as market trends.

5.1. EXECUTIVE SUMMARY

Summary of market trends and key drivers of table-top sweeteners and table-top sweetener markets.

5.2. TABLE-TOP SWEETENER BY PRODUCT TYPE, KT

Type	2018	2022	2027
Powder			
Tablet			
Liquid			

5.3. TABLE-TOP SWEETENER INGREDIENT BY PRODUCT TYPE, 2022, KT

Ingredient	Powder	Tablet	Liquid
Ingredient 1			
Ingredient 2			
Ingredient 3			
…			

5.4. TABLE-TOP SWEETENER PRODUCT TYPE BY SALES CHANNEL, KT

Type		2018	2022	2027
Powder	Retail			
	Online			
	Food Service			
Tablet	Retail			
	Online			
	Food Service			
Liquid	Retail			
	Online			
	Food Service			

5.5. TABLE-TOP SWEETENER INGREDIENT DEMAND AND FORECAST, KT

Ingredient	2018	2022	2027	CAGR 2018-2022	CAGR 2022-2027
Ingredient 1					
Ingredient 2					
Ingredient 3					
…					

5.6. TABLE-TOP SWEETENER INGREDIENT INDICATIVE PRICES

Ingredient	Indicative Price
Ingredient 1	
Ingredient 2	
Ingredient 3	
…	

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5.7. TABLE-TOP SWEETENER INGREDIENT DEMAND AND FORECAST, USD

Ingredient	2018	2022	2027	CAGR 2018-2022	CAGR 2022-2027
Ingredient 1					
Ingredient 2					
Ingredient 3					
…					

Forecast values will be derived from forecast volumes and current ingredient prices. This is due to the complexity in forecasting price volatility of ingredients, currency exchange rate fluctuations, geopolitics, and other external factors that impact pricing, such as trade disputes/disruption, etc.

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