

Global Alternative Sweetener Market Research Report 2020-2029

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Report description:

The global alternative sweetener market is expected to grow at a CAGR of 5.79% from 2023 to 2029.

Key Developments in the Global Alternative Sweetener Market

- In March 2023, HighKey, a low-sugar baked foods company, launched a sugar-free sandwich cookie made with Erythritol and Allulose as alternative sweeteners. The cookie features two crispy chocolate wafers with a vanilla creme filling.
- In April 2023, Planet Bake launched a product line of grain-free, sugar-free, vegan doughnuts, emphasizing allulose for natural sweetness.
- Nestle launched a stevia-sweetened version of its Milo chocolate malt beverage in Australia.

MARKET TRENDS & DRIVERS

Increasing Demand for Natural & Healthy Alternative

The food processing industry's supply chain primarily operates locally, with approximately 80% of ingredients being locally sourced. The rise of the middle class, urbanization, and informed consumers, coupled with population growth and increased purchasing power, has driven the adoption of convenience foods. Consequently, the heightened consumer awareness of the health benefits associated with natural ingredients has led to an increased demand for natural alternatives and supported the alternative sweetener market growth. Under current food and beverage industry trends, most functional food ingredients are derived from natural sources. Consumers have made ethical choices when purchasing, seeking value-added products that contribute to society. There is a growing demand for food ingredients from traceable, naturally grown, sustainable, and responsible sources.

Growing Demand for Sugar-Free Food

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As consumers become more aware of the detrimental effects of poorly processed food, they become more discerning about their dietary choices, and such factors positively impact the alternative sweetener market. The shift from conventional to health-conscious lifestyles has prompted manufacturers to diversify their product offerings with innovative, high-quality options. Products that claim to be dairy, lactose, gluten, or sugar-free are among the most widely available. For example, in February 2021, Halsa expanded its product line by introducing a 24oz family-size plain unsweetened zero-sugar oat milk yogurt. This new oat milk yogurt contains only 90% of the calories per serving. It serves multiple purposes as a base for creating healthy probiotic smoothies, dips, sauces, salad dressings, and other plant-based home recipes.

INDUSTRY RESTRAINTS

High Price of Alternative Sweetener

The elevated cost of natural sweetener ingredients poses a significant obstacle in producing products incorporating these natural sweetening agents. Natural sugar substitutes, such as honey, mannitol, and maltose syrup, are more expensive than conventional sugar. For instance, honey is approximately four times as costly as sugar, and specialized varieties, such as ulmo or manuka, command even higher prices. However, there are a few exceptions where some alternatives are more cost-effective than sugar. Xylitol, considered a healthy food ingredient, falls into this category as it is, in fact, cheaper than sugar. However, this primarily concerns bulk and commodity pricing rather than consumer-level prices.

SEGMENTATION INSIGHTS

INSIGHTS BY SOURCE

The global alternative sweetener market by source is segmented into natural (sorbitol, xylitol, isomalt, and others) and synthetic (aspartame, sucralose, and others). By source, the natural sweetener market dominated the industry. The demand for natural sweeteners is growing rapidly due to increasing health consciousness, concerns over the negative effects of refined sugar and artificial sweeteners, and the rise of conditions like obesity, diabetes, and metabolic syndrome. The demand for food products with reduced sugar content, concerns about cancer risks associated with obesity (endometrial, colon, and breast cancer), and heightened awareness of the adverse effects of excessive sugar consumption are all factors fueling the growth of the natural sweetener industry.

Segmentation by Source

- Natural
 - o Sorbitol
 - o Xylitol
 - o Isomalt
 - o Others
- Synthetic
 - o Aspartame
 - o Sucralose
 - o Others

INSIGHTS BY PRODUCT TYPE

The global alternative sweetener market by product type is segmented into high fructose syrup, high-intensity, and low-intensity. The high fructose product type holds the largest market share. The increase in high fructose corn syrup use because of its various

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features, such as its ability to remain in solution, high solubility, and not being crystallized, such as sucrose under certain conditions and favorable import and export tariffs of the sweetener, accelerate the industry growth. Also, the growth of the food and beverage sector, lifestyle change, high demand for packaged food, and rise in investment by the manufacturers positively affect the high fructose corn syrup market. Furthermore, developing new products through significant research and development investments extends profitable opportunities to the industry players in the forecast period.

Segmentation by Product Type

- High Fructose Syrup
- High-Intensity
- Low-Intensity

INSIGHTS BY APPLICATION

The global alternative sweetener market by application is segmented into food & beverage, pharmaceutical & nutraceutical, and others. By application, the food & beverage segment dominated the global market share. Increasing demand for ingredients that can reduce sugar content across several categories, including beverages, dairy, bakery, confectionery, soups, sauces, and dressing, with a particularly high demand for sugar substitutes from natural sources propels the segment growth. Additionally, many governments around the world have taken steps, including banning carbonated drinks in schools, restricting soft drinks advertising, modifying the composition of soft drinks, and introducing a tax on sugar-containing soft drinks. Such factors have led manufacturers to increasingly use natural and artificial sugar substitutes instead of sugar substitutes.

Segmentation by Application

- Food & Beverage
- Pharmaceutical & Nutraceutical
- Others

GEOGRAPHICAL ANALYSIS

APAC dominated the global alternative sweetener market share, accounting for a global share of over 33% in 2023. The region has also witnessed a notable shift toward sustainable and low-calorie practices, propelled by growing health concerns and the need for long-term food security. In addition, the global demand for sugar-free products is on the rise, contributing to the growth of the APAC market. Moreover, high cholesterol, weight management, and chronic heart diseases are primary reasons for avoiding products with added sugars, making APAC a lucrative market for natural sugar substitutes. Furthermore, the North American alternative sweetener industry has grown substantially, driven by a heightened health awareness among consumers. This heightened awareness has increased demand for low-calorie sugar substitutes and sugar-free products. Also, health concerns, the adverse effects of sugar, and the growing prevalence of lifestyle diseases, such as heart disease and diabetes, have spurred individuals to seek healthier alternatives, including alternative sweeteners, in the region and propel market growth.

Segmentation by Geography

- APAC
 - o□China
 - o□Japan
 - o□India
 - o□Australia
 - o□South Korea
- North America

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COMPETITIVE LANDSCAPE

The global alternative sweetener market is highly fragmented, with numerous global, local, regional, and international vendors. The number of global players is limited, and the growing trend of natural ingredients in food products has given rise to numerous domestic and local vendors in the market that pose a tough challenge to the reputed vendors across all geographies. The number of players in the market is expected to increase, further escalating the intensity of competition in the market.

The key players in the global alternative sweetener market are Ingredion, Cargill, Archer Daniels Midland, and Heartland Food Products Group. The market is also likely to undergo a fierce and competitive landscape where vendors will try to establish their market share with maximum penetration among target consumer groups.

Key Company Profiles

- Ingredion
- Cargill
- Archer Daniels Midland
- Heartland Food Products Group

Other Prominent Company Profiles

- DuPont de Nemours
- Ajinomoto
- Tate & Lyle
- Whole Earth Sweetener
- Beckmann-Kenko
- Fraken Biochem
- Hermesetas
- Roquette
- Imperial Sugar
- Mitsui DM Sugar
- Zydus Wellness

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- []A & Z Additives
- []Monk Fruit Corp
- []Celanese

KEY QUESTIONS ANSWERED:

- 1.[]How big is the global alternative sweetener market?
- 2.[]Which region dominates the global alternative sweetener market share?
- 3.[]What are the significant trends in the alternative sweetener industry?
- 4.[]What is the growth rate of the global alternative sweetener market?
- 5.[]Who are the key players in the global alternative sweetener market?

Table of Contents:

1. SCOPE & COVERAGE
 - 1.1. MARKET DERIVATION
 - 1.2. MARKET DEFINITION
 - 1.3. SEGMENT COVERAGE & DEFINITION
2. PREMIUM INSIGHTS
 - 2.1. OPPORTUNITY POCKET
 - 2.2. KEY MARKET HIGHLIGHTS
 - 2.3. REGIONAL INSIGHTS
3. MARKET DYNAMICS
 - 3.1. OPPORTUNITY & TRENDS
 - 3.2. MARKET ENABLERS
 - 3.3. MARKET RESTRAINS
 - 3.4. INTRODUCTION
 - 3.5. MARKET LANDSCAPE
4. MARKET SEGMENTATION
 - 4.1. SOURCE
 - 4.2. PRODUCT TYPE
 - 4.3. APPLICATION
5. GEOGRAPHICAL SEGMENTATION
 - 5.1. ASIA-PACIFIC (APAC)
 - 5.2. NORTH AMERICA
 - 5.3. EUROPE
 - 5.4. LATIN AMERICA
 - 5.5. MIDDLE EAST & AFRICA
6. COMPETITIVE LANDSCAPE
 - 6.1. COMPETITIVE SCENARIO
 - 6.2. MARKET SHARE ANALYSIS
 - 6.3. KEY COMPANY PROFILES
 - 6.4. OTHER PROMINENT COMPANY PROFILE

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