

Sugar Substitutes Market by Type (HFCS, High-intensity Sweeteners, Low-Intensity Sweeteners), Manufacturing Technology (Precision Fermentation, Enzymatic Conversion, Chemical Synthesis), Application, Form, Source, Region - Global Forecast to 2029

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Report description:

The global market for sugar substitutes is estimated to be valued at USD 23.56 billion in 2024 and is projected to reach USD 29.90 billion by 2029, at a CAGR of 4.9% during the forecast period. The demand for sugar substitutes is gaining significant importance in food & beverages, health & personal care products, and pharmaceutical industries. Some of the factors, such as changing consumer preferences regarding healthy lifestyle habits, increasing obesity and diabetes prevalence, and enhanced awareness of the risks of excessive sugar consumption to health, are encouraging the manufacturers to provide low-calorie and zero-calorie sweeteners in the production of food & beverages, health & personal care products, and pharmaceutical products as consumers are more inclined towards the demand for sweetness without adding calories to the diet.

Additionally, regulatory support, government initiatives, and implementation of taxes on sugary products are positively influencing reducing sugar intake further and promoting healthy food consumption. This is expected to generate a significant opportunity for sugar substitute manufacturers to enter the market with the introduction of natural & novel sweeteners and new generations of sweeteners with improved flavor profiles and blends of various sweeteners for optimal taste to use in a wide range of applications. For instance, according to the Global Report on the use of sugar-sweetened beverage taxes published by WHO in 2023, national level excise taxes applied to sugar-sweetened beverages, as these beverages include significant sources of free sugars, and it is associated with several non-communicable diseases (NCDs). This would also help in maintaining public health concerns.

Furthermore, the inclusion of sugar substitutes in various functional food & beverage products is enabling manufacturers to develop new lines of products that are aligned with current trends, such as keto-friendly products, low-calorie or no-sugar-added products, natural & clean-label products, among others. These consumer trends and innovations in product labeling are expected

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to generate a significant opportunity for the functional food & beverage and health supplement product manufacturers. Disruption in the sugar substitutes market: the disruption in the sugar substitutes market is expected to create both challenges and opportunities for the key players in the market. For instance, changes in product labeling laws for transparency in product packaging will create opportunities for natural sweetener products. However, this may pose a challenge for the manufacturers producing artificial sweeteners as consumers are focusing on ingredients that are naturally sourced and clean labelled. Furthermore, blending sugar substitutes with other functional ingredients in the final products could provide superior taste and flavors. Thus, technological innovation for ingredient management to optimize the sweetener profile could create better substitutes.

"The high-intensity sweeteners is growing at a significant CAGR among the type of sugar substitutes market."

The high-intensity sweeteners such as stevia, monk fruits, aspartame, sucralose, ace-K, and other sweeteners are significantly sweeter than sucrose, and they are used in very small quantities to meet the desired sweetness. Consumer shift towards their dietary habits, such as the keto diet, low-carb regimes, among others, are minimizing sugar consumption, hence driving the usage of various high-intensity sweeteners in products such as snacks & cereals, beverages, and processed foods. Furthermore, the opportunity for reformulation of existing products with the usage of various high-intensity sweeteners with reduced-sugar options without compromising the taste of the products is also expected to generate significant demand for high-intensity sweeteners.

"The artificial high-intensity sweeteners segment is projected to hold a significant market share in the source segment during the forecast period."

The FDA is actively monitoring and regulating sweeteners in food, reaffirming its commitment to public health, particularly after the International Agency for Research on Cancer (IARC) classified aspartame as "possibly carcinogenic to humans" in July 2023. The FDA disagrees with this conclusion, emphasizing that aspartame is one of the most extensively studied food additives, with over 100 studies confirming its safety and can be consumed under the approved conditions. Furthermore, the FDA still maintains its acceptable daily intake for aspartame and thus allows the additive in low-calorie or sugar-free products. It is largely used as a tabletop sweetener and in chewing gum, cold breakfast cereals, and dry bases for certain foods (for example, beverages, instant coffee & tea, gelatins, puddings & fillings, and dairy products & toppings). Furthermore, artificial sweeteners such as acesulfame potassium, sucralose, neotame, and saccharin can be used as a food ingredient, ensuring the regulatory status and safety of the ingredients in the product before marketing. Thus, acceptance of numerous sweeteners in food & beverage applications is expected to drive demand for artificial sweeteners, given increased requirements for lower-calorie and sugar-free options by the consuming public.

North America is expected to have a significant share in the sugar substitutes market.

North America is the largest market for bakery items, candies, and confectioneries. An upsurge in snacking culture and gourmet/artisanal products is further pushing this market in a positive direction. As health-consciousness increases among consumers, they are looking for alternatives to traditional sugary food, which is thereby promoting a tremendous shift towards healthy food.

Concurrently with this demand, the North American market for sugar substitutes is increasing. According to the article published by the US CENTERS FOR DISEASE CONTROL AND PREVENTION (CDC), over one in three Americans is at increased risk for type 2 diabetes in November 2023. An increased prevalence of prediabetes and a growing awareness toward healthier lifestyles have acted as an impetus for consumers to seek reduced amounts of sugar in the food products they consume, thereby increasing the use of sugar substitutes. ADM (US), Ingredion (US), and Cargill, Incorporated (US) are some of the major players in the North American sugar substitutes market. They specialize in new and innovative sweeteners with novel functions that support consumers in developing healthy eating habits, helping them in a better way to capture this new trend.

In-depth interviews have been conducted with chief executive officers (CEOs), Directors, and other executives from various key organizations operating in the sugar substitutes market:

- By Company Type: Tier 1 - 25%, Tier 2 - 45%, and Tier 3 - 30%

- By Designation: CXO's - 20%, Managers - 50%, Executives- 30%

- By Region: North America - 25%, Europe - 30%, Asia Pacific - 20%, South America - 15% and Rest of the World -10%

Prominent companies in the market Cargill, Incorporated (US), ADM (US), Ingredion (US), International Flavors & Fragrances Inc

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(US), Tate & Lyle (UK), Ajinomoto Co. Inc (Japan), GLG Life Tech Corp (Canada), Celanese Corporation (US), Roquette Freres (France), PCIPL (India), Mane SA. (France), Dohler GmbH (Germany), Morita Kagaku Kogyo Co., Ltd (Japan), zuChem (US), and Van Wankum Ingredients (Netherlands).

Other players include Tag Ingredients India Pvt Ltd (India), Sweetly SteviaUSA (UK), Foodchem International Corporation (China), JK Sucralose Inc. (China), The Real Stevia Company AB (Sweden), Stevia Hub India (India), Pyure Brands (US), XiliNat (Mexico), Savanna Ingredients (Germany) and Bonumose, Inc (US).

Research Coverage:

This research report categorizes the Sugar Substitutes Market by Type (HFCS, High-intensity Sweeteners, Low-Intensity Sweeteners), Manufacturing Technology (Precision Fermentation, Enzymatic Conversion, Chemical Synthesis), Application, Form, Source, and Region - Global Forecast to 2029. The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of sugar substitutes. A detailed analysis of the key industry players has been done to provide insights into their business overview, services, key strategies, contracts, partnerships, agreements, new service launches, mergers and acquisitions, and recent developments associated with the sugar substitutes market. Competitive analysis of upcoming startups in the sugar substitutes market ecosystem is covered in this report. Furthermore, industry-specific trends such as technology analysis, ecosystem and market mapping, patent, regulatory landscape, among others, are also covered in the study.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall sugar substitutes and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

- Analysis of key drivers (Increase in health consciousness), restraints (Health concerns associated with consumption of sugar substitutes), opportunities (Rising investments in sugar substitute production), and challenges (Product labeling and claims issues) influencing the growth of the sugar substitutes market.
- New product launch/Innovation: Detailed insights on research & development activities and new product launches in the sugar substitutes market.
- Market Development: Comprehensive information about lucrative markets - the report analyzes the sugar substitutes across varied regions.
- Market Diversification: Exhaustive information about new services, untapped geographies, recent developments, and investments in the sugar substitutes market.
- Competitive Assessment: In-depth assessment of market shares, growth strategies, product offerings, brand/product comparison, and product food prints of leading players such as Cargill, Incorporated (US), ADM (US), Ingredion (US), International Flavors & Fragrances Inc (US), Tate & Lyle (UK) and other players in the sugar substitutes market.

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