Global Markets for Low Calorie & Caloric Sweeteners: 2016 Database
Where is the world of sweeteners heading?

Revised sugar guidelines amid growing consumer concerns and the launch of new sweeteners signal changes ahead in the sweetener market:

- The WHO and the USDA have issued new guidelines to reduce sugar intake. Meanwhile, the UK announced it will tax sugar-containing soft drinks as of April 2018. Next year, the EU sugar policy will change radically resulting in a liberalised market.
  - What will these developments mean for the demand for sugar and its alternatives?

- 2015 saw the roll out of Coca-Cola Life™, sweetened with stevia, and the launch of allulose, a rare sugar.
  - Will demand grow for reduced-calorie products?

- China, India, Brazil – These emerging markets were driving growth in global sweetener consumption, but now face great economic challenges.
  - What will be the impact on global demand for different sweeteners?

LMC answers these questions in *Global Markets for Low Calorie & Caloric Sweeteners* – just completed – with forecasts to 2020.
What LMC's sweetener service offers

Global Markets for Low Calorie & Caloric Sweeteners

LMC International has identified trends and prepared forecasts for sugar and alternative sweeteners around the world since 1980. This service focuses on the demand for the alternatives to sugar.

Subscribers have access to comprehensive data and analysis that cannot be obtained elsewhere on this under-reported sector.

The deliverables are:

<table>
<thead>
<tr>
<th>Global Sweetener Demand Database (Excel)</th>
<th>Historical estimates and forecasts of demand for each of:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• 7 low calorie (intense) and 3 caloric sweeteners</td>
</tr>
<tr>
<td></td>
<td>• 4 end-uses</td>
</tr>
<tr>
<td></td>
<td>• 5 regional and 11 national markets for 2010-2020</td>
</tr>
</tbody>
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| Market Overview (concise, in report-slide format) | Key market developments and trends and summary of sweetener demand forecasts |

| Methodology (concise, in PDF) | Clear explanation of LMC’s methodology for estimating historical sweetener consumption and forecasting sweetener demand |
# LMC's sweetener service coverage

## Sweeteners

<table>
<thead>
<tr>
<th>Low calorie or intense sweeteners</th>
<th>Caloric sweeteners</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Acesulfame-K</td>
<td>• Glucose (dextrose)</td>
</tr>
<tr>
<td>• Aspartame</td>
<td>• High Fructose Syrup (HFS)</td>
</tr>
<tr>
<td>• Cyclamate</td>
<td>• Sugar</td>
</tr>
<tr>
<td>• Saccharin</td>
<td></td>
</tr>
<tr>
<td>• Stevia – high purity blends *</td>
<td></td>
</tr>
<tr>
<td>• Stevia – other (lower grade) blends *</td>
<td></td>
</tr>
<tr>
<td>• Sucralose</td>
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</tbody>
</table>

## End uses

- Beverages
- Table Top
- Food
- Pharmaceutical

## Regions

- NAFTA
- South America
- EU
- Asia-Pacific
- Global

## Countries

- US, Canada, Mexico
- Brazil
- France, Germany, UK
- China, India, Japan, South Korea

## Years:

- 2010-2015 (estimates)
- 2016-2020 (forecasts)

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*This service provides separate results for high purity (CSD-quality) stevia blends, which include Rebaudioside-A, and lower grade stevia extracts.*

*LMC monitors other sweeteners such as allulose, erythritol, etc., emerging or increasing in the market, but as they are currently available only in very small volumes, they are not included in this issue of the service.*
The core of the service is LMC’s unique analysis of the demand for sweeteners. We provide subscribers with historical estimates and forecasts of consumption in an easy-to-use Excel database.

- **Historical data reveal how newer sweeteners like sucralose and stevia blends are evolving and how the other intense sweeteners, as well as sugar and the starch syrups, are responding.**

- **The forecasts identify the countries, sweeteners, and end uses with the greatest market potential.**

Note: The screen shots are intended to show the type of information provided and contain random data. The 2016 Database provides forecasts through 2020.
1. We collect and analyse the limited data available on production and trade. However, much of the data on sweeteners other than sugar must be estimated indirectly. So, LMC has developed a special approach, accepted throughout the industry, to estimate and forecast demand.

2. We work backwards from end uses, with data on consumption of end products and the sweetener content in each.

3. We cross-check our results with industrial market research, interviewing LMC’s extensive network of contacts.

4. Armed with the data, market intelligence and trends in consumption, we derive the demand for each sweetener by various end uses around the world.

How do we do it?

Select regions and countries ...

... and data, estimates & forecasts (2010-20)

Note: Screen shots display random data. The 2016 Database provides forecasts through 2020.
**Global Markets for Low Calorie & Caloric Sweeteners** provides more data and analysis than is available anywhere else.

You receive:

The 3 deliverables described above:

- The LMC Global Sweetener Demand Database – Excel pivot tables
- Market Overview – Concise report in slide format
- Methodology for estimating and forecasting demand – Written explanation in PDF

In addition:

- Reasonable access to LMC experts for discussion of the forecasts – by telephone and email

When:

**Global Markets for Low Calorie & Caloric Sweeteners: 2016 Database** is available now.

Fee:

The fee for the 2016 Database is £13,000. Payable in full upon subscribing.

The fee is payable in sterling (£), euro (€), US dollars ($), or Singapore dollars (SGD), at the prevailing exchange rate at payment.
# LMC client list

LMC has a global client base for its sweetener analysis, reports and services. Companies that have used LMC’s services include:

<table>
<thead>
<tr>
<th>Company Name</th>
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</thead>
<tbody>
<tr>
<td>AB Sugar</td>
<td>Gordian</td>
<td>PureCircle</td>
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<tr>
<td>Açúcar Guarani</td>
<td>IANSA</td>
<td>Queensland Sugar</td>
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<tr>
<td>Agriculture &amp; Livestock Industries</td>
<td>Indofood Agri Resources</td>
<td>Raizen</td>
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<td>Ajinomoto</td>
<td>Ingredion</td>
<td>Rusagro</td>
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<td>Al Khaleej Sugar</td>
<td>Inter-American Development Bank</td>
<td>Samyang</td>
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<td>American Crystal Sugar</td>
<td>Itochu</td>
<td>Savola</td>
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<td>Khonburi Sugar</td>
<td>Süd镞cker</td>
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<td>Archer Daniels Midland</td>
<td>Ledesma</td>
<td>Suiker Unie</td>
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<td>Asazgua</td>
<td>Manuelita</td>
<td>Sumitomo</td>
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<td>Asocaña</td>
<td>Mexican Sugar Chamber</td>
<td>Syngenta</td>
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<td>Bunge</td>
<td>Mitr Phol Sugar</td>
<td>Tereos</td>
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<td>Cargill</td>
<td>Mitsubishi</td>
<td>Tate &amp; Lyle</td>
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<td>CJ</td>
<td>Mitsui</td>
<td>Thai Roong Ruang Group</td>
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<td>Coca-Cola</td>
<td>Mondelez</td>
<td>Tongaat-Hulett</td>
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<td>Copersucar</td>
<td>Monsanto</td>
<td>US Dept of Agriculture</td>
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<td>Cosan</td>
<td>MSM/Felda</td>
<td>Usina São Martinho</td>
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<td>Nordzucker</td>
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<td>DSM</td>
<td>Olam International</td>
<td>Wang Kanai</td>
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<td>DuPont</td>
<td>Pantaleon</td>
<td>Wilmar Sugar</td>
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<td>General Mills</td>
<td>Pepsi-Cola</td>
<td>World Bank</td>
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