

NAVIGATING THE WORLD OF SWEETENERS 2018 Global Topic Report – Detailed Outline

Concern about sugar and other sweeteners continues to be an issue for shoppers. This 2018 report from HealthFocus International takes a deeper look at this topic globally, regionally and across 22 individual countries to help companies better understand shopper concerns and attitudes—allowing them to connect more powerfully with their targets and bring market solutions faster and more profitably.

MARKETS:

The following regions and countries are covered within the report:

- NORTH AMERICA: USA and Canada
- LATIN AMERICA: Brazil and Mexico
- EUROPE: France, Germany, UK and Russia
- WEST ASIA: Saudi Arabia and Turkey
- SOUTH ASIA: India and Pakistan
- EAST ASIA PACIFIC: Australia, China, Indonesia, Japan, Malaysia, Philippines, South Korea, Taiwan, Thailand and Vietnam

TABLE OF CONTENTS:

- Introduction and Methodology
- Summary and Opportunities
- Global Overview of Sweeteners
- Sizing the Sugar and Artificial Sweetener Markets
- Detailed Findings by Region and Country
- Appendix – Sweetener Ratings & Individual Country Snapshots

TOPICS COVERED:

- **Exploring the Sugar Reduction Trend**
 - How many shoppers say reducing sugar has become more important in their diet over the past two years?
 - Which markets are most focused on sugar reduction?
 - How does reducing sugar compare to other key dietary trends like plant-based foods/beverages, eating clean, natural, no artificial sweeteners, adding protein, adding whole grain, adding fiber, etc.)?

- How many shoppers have decreased their use of sugar over the past two years?
 - How concerned are shoppers about sugar?
 - Does reducing sugar make foods/beverage seem a lot healthier?
 - Is sugar one of the top things shoppers want information about on the front of food packages? How does it compare to other things like calories, protein, fat, etc.?
 - How are shoppers cutting back on sugar in their diet?
 - Choosing foods that are less sweet
 - Choosing beverages that are less sweet
 - Choosing unsweet foods
 - Choosing unsweet beverages
 - Eating more foods with non-sugar sweeteners
 - Drinking more beverages with non-sugar sweeteners
 - Choosing foods that substitute other flavors for sugar
 - Choosing beverages that substitute other flavors for sugar
- **Sugar vs. Artificial Sweeteners**
- Which markets are more concerned about sugar vs. artificial sweeteners?
 - Labeling: How important are the following statements on labels?
 - Sugar free
 - Reduced sugar (e.g., 25% less sugar)
 - No artificial sweeteners
 - Naturally sweetened
 - Brand Influence: How important are the following factors in influencing shoppers to try a different brand food or beverage?
 - Lower sugar
 - No added sugar
 - No artificial sweeteners
 - Brand Influence for Children: How important are the following factors in getting parents to purchase products for their children?
 - Lower in sugar
 - No artificial sweeteners
 - Naturally sweetened
 - Impact on Beverage Selection
 - Do shoppers believe artificial sweeteners are a good way to reduce sugar content in beverages?
 - How many choose beverages with lower sugar content even if they contain artificial sweeteners?
 - How many shoppers always/usually choose beverages because they contain no artificial sweeteners?
- **Artificial Sweeteners:**
- How many shoppers say avoiding artificial sweeteners has become more important in their diet over the past two years?

- Which markets are most focused on avoiding artificial sweeteners?
 - How does avoiding artificial sweeteners compare to other key dietary trends like: reducing sugar, eating clean, natural, etc.)?
 - How has usage of artificial sweeteners changed over the past two years? (Increased, same, decreased or don't use)
 - Which markets are most concerned about artificial sweeteners?
 - Do shoppers think artificial sweeteners are safe?
 - Are shoppers willing to pay up to 10% more for foods and beverages that are free-from artificial sweeteners?
 - Does using no artificial sweeteners make foods/beverages seem a lot healthier?
- **Sizing the Markets**
 - Sugar and artificial sweetener markets are sized by grouping respondents based on usage and concern.
 - Sizing the Sugar Markets:
 1. Sugar Acceptors: No opinion/not concerned about sugar + usage is the same or has increased over last two years
 2. Sugar Concerned: Extremely/very/somewhat concerned about sugar + usage is the same or has increased over last two years
 3. Sugar Avoiders: Sugar use has decreased over last two years
 4. Sugar Rejecters: Doesn't use sugar
 - Sizing the Artificial Sweetener Markets
 1. Artificial Acceptors: No opinion/not concerned about artificial sweeteners + usage is the same or has increased over last two years
 2. Artificial Concerned: Extremely/very/somewhat concerned about artificial sweeteners + usage is the same or has increased over last two years
 3. Artificial Avoiders: Artificial sweetener use has decreased over last two years
 4. Artificial Rejecters: Doesn't use artificial sweeteners
 - Which becomes the priority: artificial sweeteners or sugar?
 - Net rejecter/avoider/concerned for sugar is plotted against artificial sweeteners to visualize negativity towards each by region and country
 - Sugar and Artificial Sweetener Outlook by Market
 - Usage vs. concern is plotted to provide a 2-dimensional view of where shoppers are not only concerned, but taking action to avoid sugar and artificial sweeteners. The groups are broken down into:
 1. Unaffected
 2. Proactive
 3. Inactive
 4. Affected

- **Sweeteners**

- Ratings (good/neutral/bad) for 24 different sweeteners:
 - Acesulfame potassium (Ace-K)
 - Agave
 - Allulose
 - Artificial sweeteners
 - Aspartame/Equal
 - Coconut palm sugar
 - Cyclamate
 - Erythritol
 - Fructose
 - Fruit juices
 - High fructose corn syrup (HFCS)
 - Honey
 - Low-calorie sweeteners
 - Maple syrup
 - Monk fruit
 - Rebaudioside A (Reb-A)
 - Soluble corn fiber
 - Splenda/Sucralose
 - Stevia
 - Steviol glycosides
 - Sucrose
 - Sugar
 - Sweet'N Low/Saccharine
 - Xylitol
- Are more “natural” sweeteners like honey, monk fruit, coconut palm sugar, agave and stevia rated higher?
- How concerned are shoppers about:
 - Acesulfame Potassium (ACE-K)
 - Artificial sweeteners
 - Aspartame
 - High fructose corn syrup
 - Low-calorie sweeteners
 - Sucralose
 - Sugar

- **Low-Calorie Sweeteners**

- How many shoppers are interested in low-calorie sweeteners?
- How many are interested in specific types?
 - Stevia/Rebiana (e.g. Truvia, PureVia)
 - Sucralose/Splenda
 - Aspartame
- Of those interested, how many shoppers would be willing to pay up to 10% more for products that include:
 - Low-calorie sweeteners

- Stevia/Rebiana (e.g. Truvia, PureVia)
- Sucralose/Splenda
- Aspartame