



SWEETENER SOLUTIONS: A PATH FORWARD

New Sweetener Insights from Around the World

2020 Global Topic Report – Detailed Outline

Sugar continues to be villainized and consumers are looking for ways to cut back their intake. While there is no shortage of low sugar and sugar alternative options across all categories, market solutions are still falling short. Consumer needs and preferences vary drastically, making sweetener solutions a complex issue without a “one-size-fits-all” resolution.

This 2020 report from HealthFocus International takes a deeper look at the topic of sugar and sweeteners globally, regionally, and across 22 individual countries to help companies better understand shopper motivations and attitudes—providing a blueprint for successful sweetener solutions.

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, Spain, and Russia
- MIDDLE EAST & AFRICA: Saudi Arabia, Turkey, and Nigeria
- SOUTH ASIA: India and Pakistan
- EAST ASIA PACIFIC: Australia, China, Indonesia, Japan, Philippines, S. Korea, Thailand, and Vietnam

TOPICS COVERED:

- HealthFocus Sweetener Segmentation:
 - When it comes to sweeteners, consumer requirements are diverse and there isn’t a one-size-fits-all approach. HealthFocus International has identified six unique sweetener groups that are most universal to shoppers today. These *Sweetener Segments* allow companies to better understand the wide-range of shopper attitudes and preferences towards sweeteners, and to help them navigate the complexity of sweetener solutions.
 - Naturalists
 - Minimalists

- Change-Ups
 - Uninteresteds
 - Calorie Counters
 - Sweet-Tooths
- Global Sweetener Trends:
 - At what rate are concerns about sugar, artificial sweeteners, and high fructose corn syrup rising?
 - Trends in sweetener labeling
 - Decreasing use of sugar and artificial sweeteners
 - How have ratings changed for sugar, artificial sweeteners, and low calorie sweeteners?
 - Has reducing sugar become more important in their diet over the last year?
 - Has avoiding artificial sweeteners become more important in their diet over the last year?
 - How have tastes changed? Do shoppers prefer products that taste less sweet more than they used to?
- Consumer Attitudes and Actions Towards Sugar:
 - How concerned are shoppers about sugar? Which markets are most concerned?
 - How important are “reduced sugar (e.g., 25% less sugar)” claims on labels?
 - How many shoppers want to see information about sugar on the front of food packages?
 - Do shoppers believe reduced sugar makes processed foods/beverages healthier?
 - In the past 2 years, how has their use of sugar changed?
 - What are they doing to reduce sugar in their diet?
 - How do attitudes and actions change by key demographic groups?
- Consumer Attitudes and Actions Towards Artificial Sweeteners:
 - How concerned are shoppers about artificial sweeteners? Which markets are most concerned?
 - How important are “no artificial sweeteners” claims on labels?
 - In the past 2 years, how has their use of artificial sweeteners changed?
 - How do attitudes and actions change by key demographic groups?
- Sweetener Rating and Preferences:
 - Are shoppers avoiding specific sweeteners? Has the use of a specific sweetener in a product caused them to use it less often or avoid it entirely?
 - Net Sentiment Scores for 20+ individual sweetener ratings. How do ratings vary by market and demographically?
 - 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
- Impact of Sweeteners on Shopping for Kids:
 - How important are the following factors in getting parents to purchase products for their children? How does impact vary by market?
 - No artificial sweeteners
 - Lower in sugar
 - Naturally sweetened
 - Globally, how does the brand influence of no artificial sweeteners, lower in sugar, and naturally sweetened compare to other factors (e.g., nutrition, high fiber, fortification, high protein, clean label, etc.) when shopping for children?