

Sugar and Alternative Sweeteners - US - December 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Sales of sugar and alternative sweeteners continue to fall, as consumers continue to limit their usage and are turning to other, less-sweet options. Honey brands are benefiting as well as leveraging a connection to nature. Artificial sweeteners continue to suffer the same plight of other man-made ingredients and foods, the perception of processed."

- **William Roberts, Jr, Senior Food & Drink Analyst**

This report looks at the following areas:

- Sales declines continue
- A majority of consumers are limiting sugar/sweetener consumption
- Long-term health initiatives driving reduction
- Motivating younger consumers
- Connecting with nature

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Sugar and Alternative Sweeteners - US - December 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

Sales declines continue

Figure 1: Total US sales and fan chart forecast of sugar and alternative sweeteners, at current prices, 2013-23

A majority of consumers are limiting sugar/sweetener consumption

Figure 2: Consumers limiting/avoiding sugar and sweeteners, September 2018

Long-term health initiatives driving reduction

Figure 3: Reasons for limiting sugar, September 2018

The opportunities

Motivating younger consumers

Figure 4: Dental/aesthetic reasons for limiting sugar, by age, September 2018

Connecting with nature

What it means

The Market – What You Need to Know

Sugar/sweetener market continues decline

Honey leveraging natural appeal

To health and back

Market Size and Forecast

Sweetener sales decline intensifies

Figure 5: Total US sales and fan chart forecast of sugar and alternative sweeteners, at current prices, 2013-23

Figure 6: Total US sales and forecast of sugar and alternative sweeteners, at current prices, 2013-23

Market Breakdown

Honey gains as other segments falter

Figure 7: Segment market share of sugar and sweeteners, 2018 (est)

Figure 8: Total US retail sales and forecast of sugar and alternative sweeteners, by segment, at current prices, 2013-23

Market Factors

Health strongly impacting consumers

Figure 9: Weight management status, July 2017

Sweet sensation without taxation

Figure 10: Impact of tax on sweetened beverage consumption, by age, September 2018

Diabetes, prediabetes numbers rise

Key Players – What You Need to Know

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Sugar and Alternative Sweeteners - US - December 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Store brands lean in to local appeal
- Natural appeal of honey
- Other sweetener segments face challenges
- GMO-free potential

Company and Brand Sales of Sugar and Alternative Sweeteners

- Private label maintains dominant market share
- Sales of sugar and sweeteners by company
 - Figure 11: Sales of sugar and sweeteners, by company, 2017 and 2018

What's Working?

- Honey brands push environmental, natural appeal
 - Figure 12: US honey introductions, by claim, 2017-18
 - Figure 13: Nature Nate's Honey introductions, 2018

What's Struggling?

- Sugary backlash felt by sweeteners at large
 - Figure 14: Usage trend – Cooking from scratch, September 2018

What's Next?

- Free-from from private label
 - Figure 15: US introductions of sugar and sweeteners, by private label versus branded, 2014-18
 - Figure 16: Sugar and sweetener launches in the US, private label versus branded, by free-from claims, 2017-18

The Consumer – What You Need to Know

- Sugar still popular, but honey's gaining traction with younger consumers
- Alternative sweeteners poised for growth
- Road to health could detour sugar
- Natural appeal getting sticky
- Packaged food and drinks bear the brunt of sugar revolt

Sweeteners Used

- Sugar leads sweeteners used
 - Figure 17: Sweeteners used, September 2018
- Sweetener applications could use refresh
 - Figure 18: Sweeteners used, by usage of sweeteners, September 2018
- Honey's popularity strong among younger consumers
 - Figure 19: Sweeteners used, by age, September 2018
- Honey notably more popular among Hispanic consumers
 - Figure 20: Sweeteners used, by Hispanic origin, September 2018

Sweetener Usage Trend

- Consumers limiting sweetener use
 - Figure 21: Sweetener usage trend, September 2018

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Sugar and Alternative Sweeteners - US - December 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Younger consumers taking a real approach

Figure 22: Sweetener usage trend – more, by age, September 2018

Hispanic interest in limiting sugar

Figure 23: Sweetener usage trend, by Hispanic origin, September 2018

Reasons for Limiting Sugar

Cutting sugar regarded as a means of improving health

Figure 24: Reasons for limiting sugar, September 2018

Health concerns impacting younger consumers

Figure 25: Reasons for limiting sugar, by age, September 2018

Healthy reasoning

Figure 26: Health and sweeteners, September 2018

Sugar Substitutes

Honey significantly most popular alternative to sugar

Figure 27: Sugar substitutes, September 2018

Figure 28: Opinions of artificial versus natural sweeteners, September 2018

Sweeteners in Packaged Food/Drink

Sweetened beverages lead the list of concerns

Figure 29: Sweetener concern by category, September 2018

Consumer uncertainty about sweeteners

Figure 30: Labeling of sugar/sweeteners in packaged food/drink, September 2018

Fathers more willing to consider artificial sweeteners

Figure 31: Opinions of artificial sweeteners, by gender and presence of children, September 2018

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Appendix – The Market

Figure 32: Total US sales and forecast of sugar and alternative sweeteners, at inflation-adjusted prices, 2013-23

Figure 33: Total US retail sales and forecast of sugar and alternative sweeteners, by segment, at current prices, 2013-23

Figure 34: Total US retail sales of sugar and alternative sweeteners, by segment, at current prices, 2016 and 2018

Figure 35: Total US retail sales and forecast of sugar, at current prices, 2013-23

Figure 36: Total US retail sales and forecast of sugar, at inflation-adjusted prices, 2013-23

Figure 37: Total US retail sales and forecast of syrup and molasses, at current prices, 2013-23

Figure 38: Total US retail sales and forecast of syrup and molasses, at inflation-adjusted prices, 2013-23

Figure 39: Total US retail sales and forecast of sugar substitutes, at current prices, 2013-23

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Sugar and Alternative Sweeteners - US - December 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 40: Total US retail sales and forecast of sugar substitutes, at inflation-adjusted prices, 2013-23

Figure 41: Total US retail sales and forecast of honey, at current prices, 2013-23

Figure 42: Total US retail sales and forecast of honey, at inflation-adjusted prices, 2013-23

Figure 43: Total US retail sales of sugar and alternative sweeteners, by channel, at current prices, 2013-18

Figure 44: Total US retail sales of sugar and alternative sweeteners, by channel, at current prices, 2016 and 2018

Figure 45: US supermarket sales of sugar and alternative sweeteners, at current prices, 2013-18

Figure 46: US sales of sugar and alternative sweeteners through other retail channels, at current prices, 2013-18

Appendix – Key Players

Figure 47: Multi-outlet sales of sugar, by leading companies and brands, rolling 52 weeks 2017-18

Figure 48: Multi-outlet sales of syrup and molasses, by leading companies and brands, rolling 52 weeks 2017-18

Figure 49: Multi-outlet sales of sugar substitutes, by leading companies and brands, rolling 52 weeks 2017-18

Figure 50: Multi-outlet sales of honey, by leading companies and brands, rolling 52 weeks 2017-18

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com