

Disruption in Sugar and Sweeteners: Consumer Priorities Triggering Change

March 2021

Table of Contents

INTRODUCTION

Scope

Key Findings

360° view of disruption in sugar and sweeteners

Arresting sugar and sweetener growth a challenge

Carbonates and confectionery pivotal to sugar reduction innovation

WHAT CONSUMERS WANT

Sugar supersedes fat reduction and diet

Consumers playing the long game with sugar reduction

No added sugar in demand

Artificial sweeteners failing to win consumers' hearts and minds

A lack of trust despite regulatory assurance

Stevia falling short of great expectations

Natural sweeteners perfectly acceptable but not desirable

COVID-19 and permissible indulgence pave way for innovation

Sugar taxes look to find the efficacy sweet spot

Can front-of-pack labelling influence consumer attitudes to sugar?

No consensus on how best to inform consumers

REACTION OF THE INDUSTRY

Manufacturers see the value of no added sugar

Reassurance underpins use of no added sugar claim

Consumer attitudes drive shift to naturally unsweetened products

Manufacturers taking note of artificial sweetener fears

Strong value proposition allows artificial sweeteners to endure

Sugar taxes keep the door open to high intensity sweeteners

Sugar reduction a risk for Coca-Cola and Pepsi

Beverage giants shifting focus to low calorie options

Coca-Cola with Coffee: Health by stealth?

Further demand expected for permissible indulgence

Ice cream shows how to marry health and indulgence

Sugar reduction in chocolate confectionery: Lessons still to be learnt

Beyond sugar: Increasing snacks' appeal

INNOVATION IN SUGAR REDUCTION

Failure of Coca-Cola Life shows natural is not enough

Stevia development (1): Risking natural status for zero sugar reward

Stevia development (2): Key suppliers upscale stevia capabilities

Future sweeteners (1): Allulose ticks technical and regulatory boxes

Future sweeteners (2): Plenty of potential and plenty of issues

Sugar reduction technologies (1): Sweetness without additives

Sugar reduction technologies (2): Cutting sugar with enzymes

Choice of sweetener about more than sweetness

Suppliers move away from one-size-fits-all approach to sweetening

FUTURE DIRECTION

Consumers: Sugar consumption to remain front and centre

Manufacturers: Understanding consumers key to action on sugar

Suppliers: Must capitalise on regulation and consumer perception

APPENDIX

Definitions

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/disruption-in-sugar-and-sweeteners-consumer-priorities-triggering-change/report.