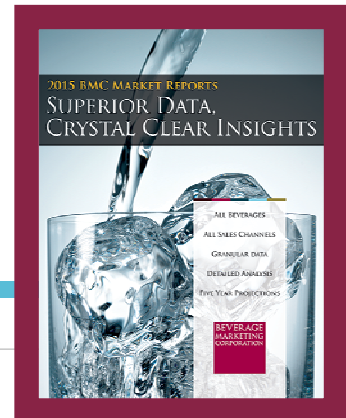


BEYOND OBESITY: THE QUEST FOR THE PERFECT BEVERAGE SWEETENER

2015 EDITION (Published August 2015. Data through 2014. Market projections through 2019.) More than 50 pages, with extensive text analysis, graphs and charts



This *Market Report* documents the decrease in total calories consumers have received from liquid refreshment beverages over time. It also discusses newly formulated sweeteners and blends, the industry's obesity-fighting initiatives and responses to consumer and government concerns.

FOR A FULL CATALOG OF REPORTS AND DATABASES, GO TO bmcreports.com

AVAILABLE FORMAT & PRICING



Direct
Download

\$995

To learn more, to place an advance order or to inquire about additional user licenses **call:** Charlene Harvey +1 212.688.7640 ext. 1962 charvey@beveragemarketing.com

INSIDE:

REPORT OVERVIEW

A brief discussion of key features of this report. 2

TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. 5

SAMPLE TEXT AND INFOGRAPHICS

A few examples of this report's text, data content layout and style. 6



HAVE
QUESTIONS?

Contact Charlene Harvey: 212-688-7640 x 1962
charvey@beveragemarketing.com

BEVERAGE
MARKETING
CORPORATION

BEVERAGE MARKETING CORPORATION
850 Third Avenue, 13th Floor, New York, NY 10022
Tel: 212-688-7640 Fax: 212-826-1255

THE ANSWERS YOU NEED

Beyond Obesity: The Quest for the Perfect Beverage Sweetener provides in-depth analysis, shedding light on various aspects of the search for the holy grail of beverage sweeteners. Questions answered include:

- Among U.S. residents, how many calories per day come from liquid refreshment beverages, and how has this changed since the turn of the century?
- What are the various artificial and natural sweeteners being used in place of sugar and high fructose corn syrup, and which beverage brands use them?
- How is the low-calorie beverage market likely to develop in the future?
- What will be the likely size of low- and zero-calorie products by beverage segment by 2019?

THIS REPORT FEATURES

Beyond Obesity: The Quest for the Perfect Beverage Sweetener discusses how obesity, while still a relevant societal problem, has become intertwined with increasing concerns about processed foods and artificial ingredients in general. Still, "calories in, calories out" remains an important tenet of people's thinking and the beverage industry - fairly or unfairly - has borne the brunt of criticism. (While food contributes most of daily calories, beverages are somehow seen as more "superfluous"). This report looks at how marketers have responded and in many cases pre-empted obesity concerns through the availability of low calorie options. It also chronicles the bevy of soft drink taxes proposed by various governments and the efforts by industry groups to thwart them. The artificial and natural sweeteners approved by the FDA for use in beverages are also discussed, along with their real-world success (or lack thereof) in the marketplace. Finally, the report looks towards the future with a comprehensive look at the natural sweeteners that are likely to steal share from artificial sweeteners in the coming years. In this report, users get a thorough understanding of all facets of low-calorie beverage options including:

- Historical, current and projected market statistics on calories consumed through liquid refreshment beverages as a way to put the debate in context
- A look at the efforts of industry groups like the American Beverage Association to address and combat such concerns through education, industry self-regulation and school programs
- A survey of the political landscape wherein governments seek to raise tax revenues by targeting the soft drink industry, so far with little success
- Detailed profiles and analysis of the leading sweeteners and the companies that make them, as well as the beverage brands that employ them
- Discussion of so-called natural alternatives beyond stevia and ancillary efforts such as taste modifiers
- Five-year projections for the zero-/low-calorie beverage market by beverage segment

Beyond Obesity: The Quest for the Perfect Beverage Sweetener

August 2015

BEVERAGE
MARKETING
CORPORATION

RESEARCH • DATA • CONSULTING

NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

Copyright © 2015 Beverage Marketing Corporation of New York, 850 Third Avenue, New York, New York 10022, (212) 688-7640. All rights reserved. Reproductions in any form prohibited by law.

Contents

Table of Contents

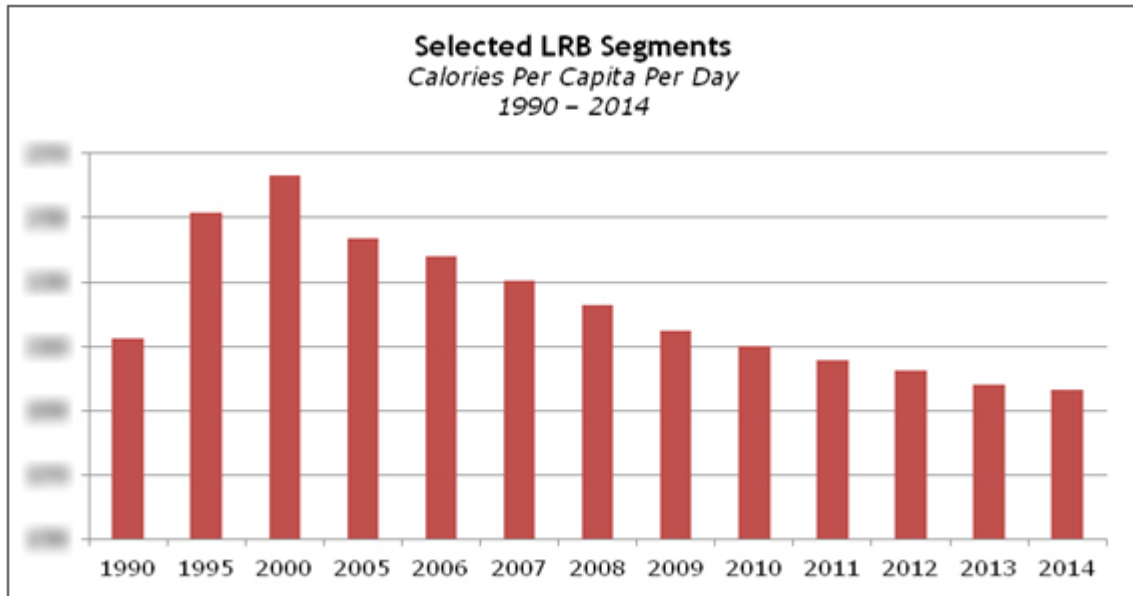
TABLE OF CONTENTS

TABLE OF CONTENTS	i
INTRODUCTION	ii

Summary

BEYOND OBESITY: THE QUEST FOR THE PERFECT BEVERAGE SWEETENER

The Obesity Issue	1
Sweeteners and Low-Calorie Beverages	9
The Future of Sweeteners	46
<i>Exhibits</i>	
1 Liquid Refreshment Beverages Calories Per Capita Per Day 1990 – 2014	51
2 Selected Brands by Sweetener Type 2015	52
3 Selected Liquid Refreshment Beverage Segments Estimated Volume, Share and Growth of Zero/Reduced Calorie Products 2014 – 2019	56



Source: Beverage Marketing Corporation

The FDA has approved six high-intensity sweeteners as food additives: saccharin, aspartame, acesulfame potassium (or ace-K, as it is more commonly known), sucralose, neotame and advantame. The FDA has also ruled that Rebaudioside A (Reb A) at 95% purity or above is GRAS (generally recognized as safe) for use in foods and beverages. Reb A is derived from the stevia leaf and is part of the new wave of so-called natural sugar substitutes that are cannibalizing the artificial sweeteners to some extent. (As noted below, monk fruit extract has also been accorded GRAS status.)

- In 1957, Sweet'N Low brand saccharin was introduced in the United States. Introduced in 1963, Coca-Cola's TaB, which is not a very popular drink anymore, began to use saccharin in 1970 when cyclamate was banned.
- Due to rat studies that suggested that saccharin contributed to bladder cancer, saccharin products had warning labels between 1981 and 2000. However, the warning label was dropped when it was found that the studies were flawed. For instance, the amount of saccharin consumed by the afflicted rats was the human equivalent of several hundred cans of diet soda a day.
- In 1981, the FDA approved NutraSweet aspartame low-calorie sweetener, developed in 1965 by the G.D. Searle Company, as a tabletop sweetener, as well as for use in various foods and powdered beverages.
- In 1982, G.D. Searle introduced the Equal brand of tabletop sweetener. The FDA approved aspartame as a CSD sweetener in 1983.
- Monsanto acquired G.D. Searle in 1985 and sold the NutraSweet sweetener ingredient business, as well as the sweetener neotame, to J.W. Childs Equity Partners II L.P. for \$440 million in May 2000. Also in 2000, Monsanto sold the Equal tabletop sweetener business to Merisant Company, which was formed by investment firm Pegasus Capital Advisors LP. In 2007, Merisant's license to use the NutraSweet brand lapsed, reverting back to J.W. Childs, which put out a blue-packaged artificial sweetener (aspartame and ace-K) with the NutraSweet name.
- However, according to reports, J.W. Childs exited the aspartame business in the U.S. at the end of 2014, leaving Merisant's Equal as the principal aspartame tabletop sweetener. J.W. Childs cited low cost imports for the decision to shutter its aspartame production plant. Meanwhile, Flavors Holdings Inc. acquired Merisant in October 2014.