

A photograph of various natural sweeteners on a wooden surface. In the foreground, there is a glass jar of honey with a wooden mortar and pestle. To the left, there are several white sugar cubes. In the background, there are three wooden bowls: one containing brown sugar, one containing white sugar, and one containing orange-colored granules. Fresh green leaves are scattered in the bottom left corner.

INGREDIENT HOT LIST: Sweeteners

As global concern over obesity and the pursuit of clean ingredients continues, artificial sweeteners are sometimes met with consumer uncertainty. Additionally, with concerns around COVID-19 still prevalent, sugar reduction will continue to be an area of focus to combat health factors associated with severe cases. And with 73% of consumers ranking taste as more important than grams of sugar in a product, brands may find themselves in a sticky-sweetener situation. From allulose to erythritol to honey, let's check out what's new, what's hot, and how consumers feel about the sweet world of sugar substitutes. What are the sweeteners making waves with consumers?

CONSUMER PERCEPTIONS

Consumers are actively avoiding excess sugar in their foods and beverages. Especially as COVID-19 cases persist, sugar reduction will continue to be an area of focus as obesity and diabetes are two underlying health conditions that are risk factors for severe COVID-19 outcomes. According to Mintel, 87% of US consumers say they are limiting their consumption of sugar, and 74% of adults agree a healthy diet should be low in sugar.

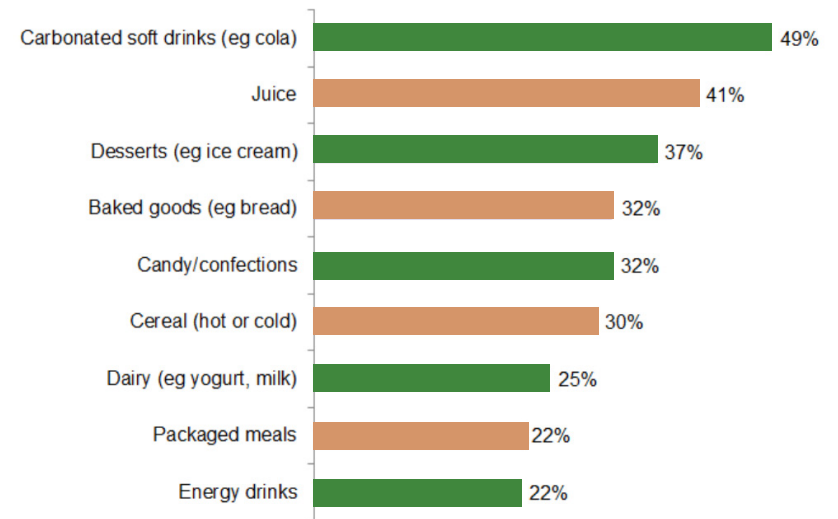
When asked to rank food claims, Mintel found that consumers ranked “no added sugar” as more important than any other claim, and 76% of consumers think it is important to know if their food contains sugar substitutes. And although consumers value “no added sugar,” they often believe that reducing sugar means increasing artificial ingredients—making them choose between two perceived evils. In fact, 41% of US consumers say they avoid artificial sweeteners. Yet not all sweetened products are of top concern for consumers—the top product categories facing consumer scrutiny are carbonated soft drinks, juice, and desserts.

76% OF CONSUMERS THINK IT IS IMPORTANT TO KNOW IF THEIR FOOD CONTAINS SUGAR SUBSTITUTES.



FIGURE 29: SWEETENER CONCERN BY CATEGORY, SEPTEMBER 2018

“I am most concerned about added sweeteners in . . . Please select all that apply.”



Base: 2,000 internet users aged 18+

Source: Lightspeed/Mintel

CONSUMER PERCEPTIONS, continued

SUGAR SAY WHAT?

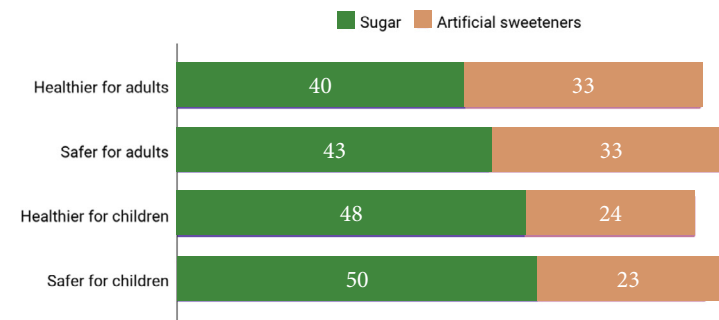
More than half of consumers are confused by reduced sugar claims. Research conducted by Quadrant Strategies for the Sugar Association found that consumers fail to recognize sugar substitutes in product ingredient lists 63% of the time; and 69% of consumers believe that products labeled “reduced sugar” or “no sugar added” are lower-calorie products. The need for more descriptive, clear labels is clear—66% of the study’s participants said they think it’s important that food manufacturers be required to clearly identify sugar substitutes as sweeteners in ingredient lists.

66% of consumers think food companies should be required to clearly identify sugar substitutes as ‘sweeteners’ in ingredient lists. On June 3, 2020 The Sugar Association filed a petition with the FDA asking them to update their industry requirements for sweetener labeling.

- QUADRANT STRATEGIES FOR THE SUGAR ASSOCIATION

PARENTS & CHILDREN

Parents want to know what’s in the products they feed their families. 76% of parents believe it’s important to know if their children’s food contains sugar substitutes, and 73% want to know the amount of sugar substitutes in that food. This could be because many consumers feel that sugar substitutes are less healthy and less safe than sugar—especially for children. In fact, Quadrant Strategies found that consumers perceive artificial sweeteners to be 10% safer and 9% healthier for adults than children.



Between the two, which is... (n = 1,002)

WHAT'S NEW & WHAT'S HOT

We're spotting new and hot ingredients in the sweetener space. Let's take a look below.

ALLULOSE (NEW)

An uncommon sugar that is 70% as sweet as sugar but only has 10% of the calories, allulose possesses the same sought-after properties of sugar like mouthfeel, bulking, and browning. Allulose is still niche in the market due to its regulatory infancy and high price point; but has potential to grow in use as sugar reduction increases.



RAY'S NO SUGAR ADDED HICKORY BARBECUE SAUCE contains 1g sugar per serving and is sweetened with allulose.

- 63% of consumers would likely or definitely would buy this product



O'MY! CAKE WALK FLAVORED DAIRY FREE GELATO is sweetened with allulose and contains 2g of sugars per serving.



DUNCAN HINES KETO FRIENDLY DOUBLE CHOCOLATE CAKE MIX lists allulose as its first ingredient and has 0g added sugar.

- 54% of consumers would likely or definitely would buy this product



FOODITIVE SWEETENER (NEW)

Created in the Netherlands, Fooditive Sweetener is a natural, zero-calorie sweetener made from fermenting fructose from apples and pears. Available in liquid, syrup, and powder forms, Fooditive Sweetener has a slightly fruity taste and is not linked to gastrointestinal upset like other sugar substitutes.



FOODITIVE NATURAL SWEETENER claims to be a 100% natural sweetener, where 1.5 tsp of Fooditive sweetener is equal to 1 tsp of sugar.

WHAT'S NEW & WHAT'S HOT, continued

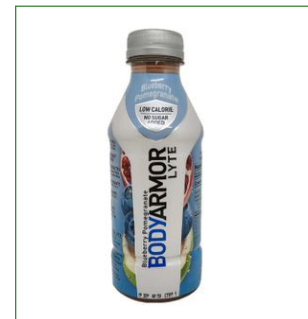


STEVIA (HOT)

Stevia is a natural sweetener derived from a South American plant, *Stevia rebaudiana*, and is most commonly used in North America and in beverage products. Stevia has inherent taste challenges, with a slow onset sweetness and a bitter, lingering aftertaste. Taste improvement is the focus of current research and patents, many of which blend stevia with erythritol or monk fruit.



DANNON LIGHT + FIT COLLAGEN & ANTIOXIDANTS RASPBERRY LIME NONFAT FLAVORED YOGURT is sweetened with stevia leaf extract.



BODYARMOR LYTE BLUEBERRY POMEGRANATE SPORTS DRINK is made with natural flavors, sweetened with stevia and erythritol and is comprised of 10% of coconut water.



LILY'S CHOCOLATE SALTED CARAMEL FLAVOR BAKING CHIPS are botanically sweetened with stevia, contain 32% cacao and have no added sugar.

- **44%** of consumers responded that they likely or definitely would buy this product

WHAT'S NEW & WHAT'S HOT, continued



HONEY (HOT)

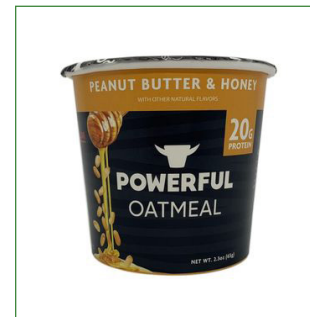
Consumers perceive honey as both healthful and indulgent, a sweetener sweet spot. Honey has seen growth in the past year, both as a flavor and as a sweetener, especially in the beverage category. Brands can look

to communicate subtle sweetness by using terms such as 'hint of honey' or 'lightly infused with honey' to align with a more balanced, healthy lifestyle.



HONEST JASMINE & HONEY ORGANIC COLD BREW GREEN TEA is said to be "just a tad sweet" and features jasmine flavor and a touch of wildflower honey.

- 44% of consumers responded that they likely or definitely would buy this product.



POWERFUL PEANUT BUTTER & HONEY OATMEAL uses honey powder for both sweetness and flavor.



DIETZ & WATSON LANDJAEGER HONEY MAPLE SWISS STYLE SAUSAGE SNACKS contain honey as the third ingredient and claim to have the perfect blend of sweet and savory.

- 44% of consumers responded that they likely or definitely would buy this product.

XYLITOL



A sugar alcohol usually extracted from corn or birch, xylitol has 40% fewer calories than sugar and does not raise blood sugar or insulin levels. It is commonly used to sweeten minty confections, but we're seeing it crossover into other categories, too.

CONSUMER SENTIMENT & STATUS

According to Infegy Atlas, xylitol has 88% positive consumer sentiment and shows Food & Drink, Desserts and Baking and Cooking as top interests for consumers over the past year. Mintel found that 40% of UK consumers would be interested in sweets made with xylitol.



Z!NT has recently launched the first organic xylitol in North America. The brand claims it has no unpleasant aftertaste and a low glycemic index score, making it a natural substitute for sugar.



SLIMFAST KETO VANILLA CAKE BATTER SHAKE MIX is a naturally flavored shake mix sweetened with xylitol.



NUTS'N MORE WHITE CHOCOLATE PRETZEL PEANUT SPREAD is described as an indulgent protein superfood and lists xylitol as its third ingredient.

- 36% of consumers responded that they likely or definitely would buy this product.

ERYTHRITOL

DARK HORSES

Erythritol is another sugar alcohol that's made from fermented corn and has only 6% of the calories of sugar. Though widely used, erythritol cannot be broken down by the body, resulting in most of it being passed in urine; and more study is needed to determine if it contributes to weight gain.

CONSUMER SENTIMENT & STATUS

A social listening search over the past year for erythritol shows 97% positive consumer sentiment and 17 mentions per hour. Commonly blended with stevia in low calorie sugar confections, Mintel found that erythritol is up 75% in global stevia-containing food and drink launches. However, consumer awareness of erythritol is still relatively low: the hashtag "#erythritol" has only 22,051 uses on Instagram, compared to the 589,081 uses of #stevia.



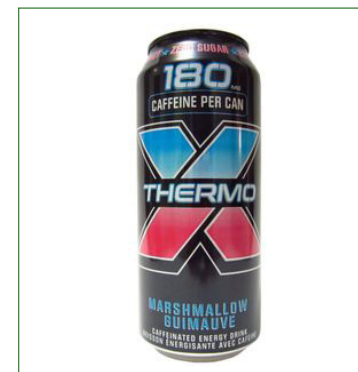
HALO TOP KEY LIME PIE LIGHT ICE CREAM is a seasonal flavor for summer that uses erythritol to sweeten and contains 63% less calories than regular ice cream.

- 49% of consumers responded that they likely or definitely would buy this product.



SIMPLY DELISH NATURAL CHOCOLATE INSTANT PUDDING claims to be sugar free and is naturally sweetened with erythritol.

- 40% of consumers would likely or definitely would buy this product



ROCKSTAR XD THERMO MARSHMALLOW CAFFEINATED ENERGY DRINK contains zero grams of sugar and is sweetened with erythritol, listed second on the product's ingredient list.



MONK FRUIT



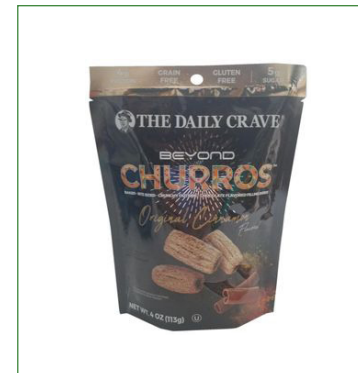
Monk fruit sweetener is extracted from monk fruit, a small round fruit grown in Southeast Asia. It contains zero calories and is 100-250 times sweeter than sugar. Monk fruit contains natural sugars like fructose and glucose, but gets its intense sweetness from antioxidants called mogrosides.

CONSUMER SENTIMENT & STATUS

Consumers see monk fruit as more label-friendly than many other sweeteners; and believe it adds sweetness without the off notes commonly found with other sugar substitutes. Monk Fruit shows 98% positive consumer sentiment and 24 mentions per hour according to a social listening search over the past year.

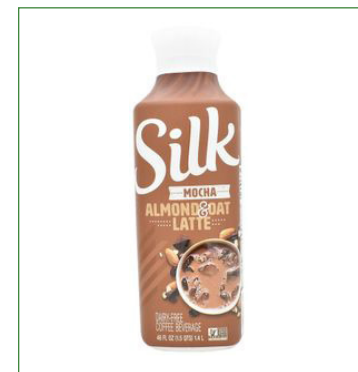


CHOC ZERO SUGAR FREE DARK CHOCOLATE WITH HAZELNUTS AND SEA SALT is described to be sweetened with nature's very own monk fruit and be the perfect treat for a sugar free lifestyle.



THE DAILY CRAVE BEYOND ORIGINAL CINNAMON FLAVORED CHURROS are sweetened with monk fruit and made with lentils, beans cassava and creamy, non-dairy chocolate.

- 46% of consumers would likely or definitely would buy this product



SILK MOCHA ALMOND & OAT LATTE can be enjoyed hot or cold and features monk fruit extract as the last ingredient.

- 49% of consumers would likely or definitely would buy this product





CUT SUGAR, KEEP TASTE

Cut sugar, but don't lose taste. Reformulating a product in the pursuit of health will not please everyone; and cutting sugar could even result in brands alienating some users. In products where indulgence and taste—not health—are most important, consumers may reject sugar reduction if the flavor or treat-yourself experience is impaired. The key to cutting sugar with success is maintaining consistent flavor profiles that meet consumers' expectations. Although many consumers are reducing the amount of sugar they consume, in our [Indulgence Insight](#), we found that 73% of consumers say taste is more important than grams of sugar per serving. Finding innovative solutions that taste great despite containing sugar substitutes—sometimes suspicious to consumers—could be the key to sweet success.

73% OF CONSUMERS SAY TASTE IS MORE IMPORTANT THAN GRAMS OF SUGAR PER SERVING.

THE TAKEAWAYS

The use of natural sweeteners to reduce sugar content will continue to be a major focus for food and drink manufacturers in the coming years due to consumer's desire for a more balanced lifestyle, as well as combatting severe COVID-19 illness and other health risks such as obesity and diabetes. Because of its healthy halo, honey has growth opportunity for use both as a sweetener and as a flavor, and newcomers like allulose and sugar alcohols like xylitol will continue to innovate across food and beverage categories. While we can only do so much sweet speculation, one thing we know for sure: consumers—73% of them—agree that taste, no matter the sugar content, is what matters most.



SOURCES

- Food Business News
- Sugar.org
- Mintel
- PRN Newswire
- Fooditive.nl
- Healthline
- Mintel GNPD

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