

SUGAR: TOP CONCERN FOR CONSUMERS AND INDUSTRY



+27%

Growth of food & beverage launches featuring sugar-related claims* (Global, 2018 vs. 2017)

*Sugar-related claims include no added sugar, sugar free and low sugar claims.



2 in 3 U.S. consumers are influenced by nutritional information on sugar when purchasing food & beverage.

Source: Innova Market Insights Trends Survey, 2018

While flavor, cost and indulgence are leading drivers of choice, sugar reduction, propelled by public health concerns and regulatory mandates, will remain on top of the reformulation agenda for some years to come.

SUGAR-RELATED CLAIMS TRAVERSE CATEGORIES

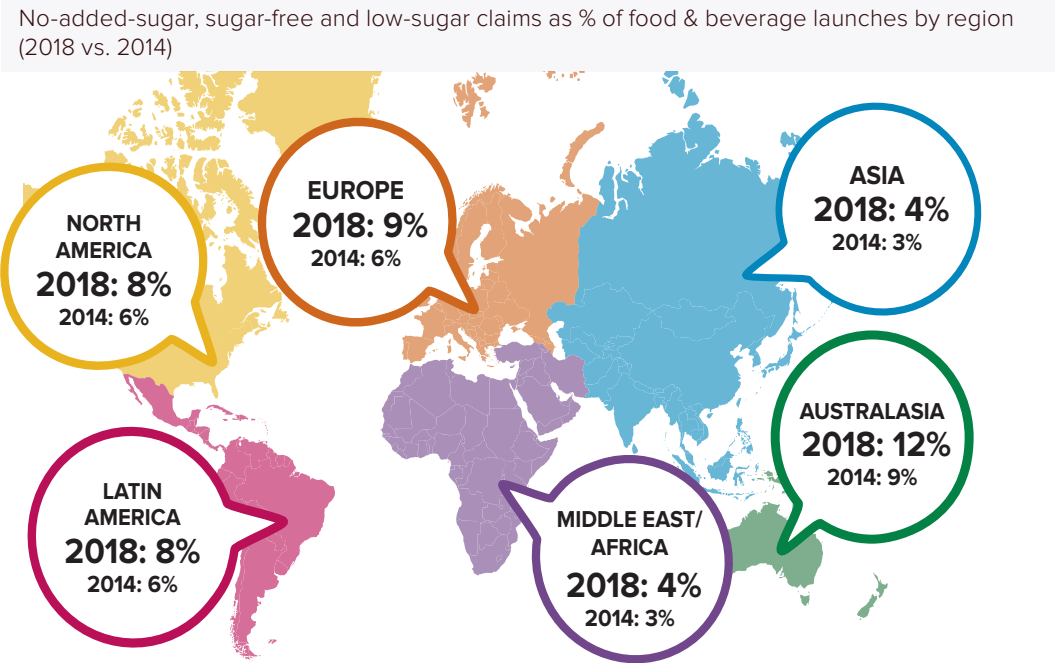
Leading market categories for sugar-related claims (Global, market penetration 2018)

SOFT DRINKS	19%
BABIES/TODDLERS	14%
SPORTS NUTRITION	12%
CONFECTIONERY	10%
DAIRY	8%

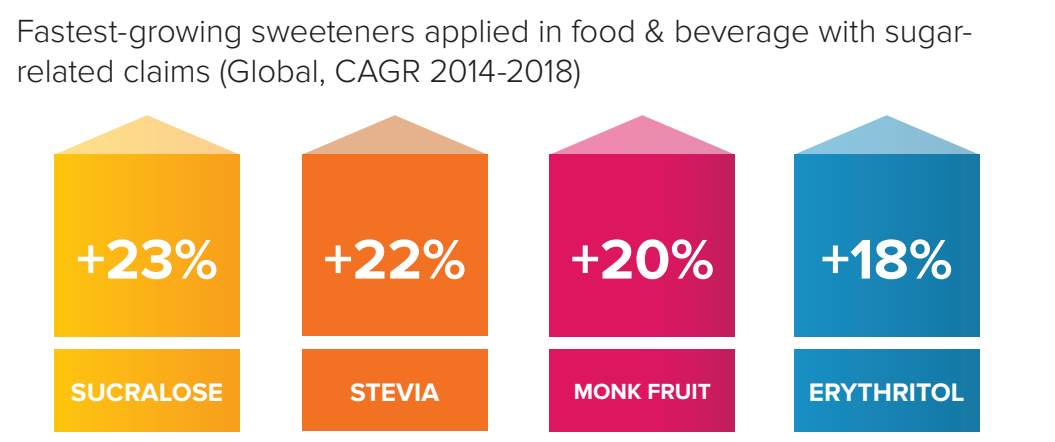
Fastest-growing leading market categories for sugar-related claims (Global, CAGR 2014-2018)

SPORTS NUTRITION	+56%
DAIRY	+32%
SNACKS	+29%


AUSTRALASIA LEADS IN SUGAR-RELATED CLAIMS



DIVERSE SUGAR SUBSTITUTES GAIN GROUND

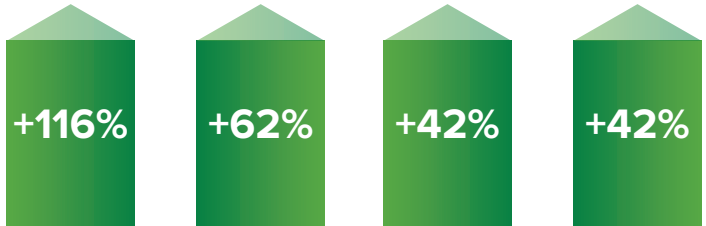


STEVIA APPLICATIONS IN FOOD AND BEVERAGE




+32%

Growth of food & beverage launches containing stevia (Global, 2018 vs. 2017)



Subcategory	Growth (CAGR 2014-2018)
SPORTS DRINKS	+116%
DAIRY ALTERNATIVE DRINKS	+62%
CONFITURE & FRUIT SPREADS	+42%
DAIRY-BASED ICE CREAM & FROZEN YOGURT	+42%

The use of the word "leaf" is trending.



+38%

Growth of food & beverage launches with "stevia leaf" in the product name, description, claim and ingredients (Global, 2018 vs. 2017)

*Subcategories with <50 new product launches in 2018 are excluded.

5 KEY SUGAR-REDUCTION TRENDS TO WATCH

- 1 MEETING EXPECTATIONS**

As reducing sugar intake is a top priority for consumers, delivering the same sweetness and texture experience in formulations that contain less sugar and fewer calories remains a key trend.
- 2 A SWEETER BALANCE**

An alternative market exists for consumers who are not looking for overly sweet products in the first place. Success with these consumers can include delivering a sensory experience with surprising taste blends.
- 3 "CLEAN LABEL" MATTERS**

Consumers are becoming ever more inquisitive, looking for clean, transparent food labels. Reformulation using simple and familiar ingredients, rather than artificial sugar alternatives, is on-trend.
- 4 PLANT-BASED SOLUTIONS**

Plant-based growth has been a key theme for several years, but the extent to which it grew into the mainstream, with both vegetarian and vegan options, became incredibly clear throughout 2018.
- 5 LOW-CALORIE OPTIONS**

More and more consumers will demand low-calorie sweeteners as the world seeks more health-driven food options. "Low-calorie" is one of the top claims featured on food and beverages tracked with stevia (Global, 2018).

CARGILL SOLUTION SPOTLIGHT

As a global innovator in sugar reduction solutions, Cargill is uniquely positioned to help you achieve your goals.

- Full portfolio of ingredients for reducing sugar and enhancing sensory enjoyment, including EverSweet™ stevia sweetener, ViaTech™ stevia leaf extract, Zerosé® erythritol and Oliggo-Fiber® chicory root fiber.
- Leadership in technical applications to support new product development and reformulation.

Partner with Cargill to benefit from proven application expertise and a reliable global supply chain.

Learn more at www.Cargill.com/sugarrreduction

