

MARKET FOR FRUCTO- OLIGOSACCHARIDES

Prepared by:

CPL Business Consultants

Innovation Centre, Milton Park, Abingdon, Oxfordshire, OX14 4RY
Tel: +44 1865 257 057, info@cplconsult.com, www.cplconsult.com

Dr Robert Harwood
Dr Esther Hunter
Dr Steve Lisansky
Dr Michael Lee
Miss Megha Chugh

TABLE OF CONTENTS

OBJECTIVE	1
BACKGROUND	1
SCOPE OF THE STUDY.....	1
METHOD.....	1
PRINCIPAL FINDINGS	2
MARKETS	2
TRENDS	5
<i>Market development</i>	5
<i>Production capacity</i>	6
<i>Company developments</i>	7
PLAYERS AND PRODUCTS	7
APPLICATION TRENDS & END USERS.....	11
<i>Soluble Fibres & Prebiotics</i>	15
<i>Regulatory</i>	18
<i>Scientific Research, Patents and Clinical Trials</i>	20
CONCLUSIONS	21
RECOMMENDATIONS	24
UPDATE ON FOS (AND INULIN) MARKET SINCE 2004	25
BACKGROUND	25
MARKET OVERVIEW.....	27
MARKET TRENDS FOR FOS/INULIN.....	36
<i>As Prebiotics</i>	36
<i>For Satiety and Weight Management</i>	38
<i>For Calcium Absorption</i>	38
<i>Consumer Awareness/Perception</i>	39
<i>Organic Inulin Products</i>	39
<i>Combinational Products</i>	40
<i>Lower Dose Inulin</i>	40
DEVELOPMENTS IN THE MARKET.....	41
<i>Expansion</i>	41
<i>Partnerships & Acquisitions</i>	41
<i>Innovative Production</i>	41
PLAYERS/DISTRIBUTORS	42
<i>2 FOS Players</i>	42
<i>10 Inulin & oligofructosaccharides players</i>	61
<i>History</i>	74
PRODUCTS	79
APPLICATIONS, TRENDS & END USERS.....	96
<i>Dairy</i>	97

<i>Beverage</i>	98
<i>Confectionery</i>	98
<i>Bakery & Cereals</i>	98
<i>Infant Formula</i>	99
<i>Meat</i>	99
<i>End Users</i>	99
<i>2004</i>	100
SCIENTIFIC RESEARCH	114
CLINICAL TRIALS.....	134
PATENTS	135
<i>Patent Overview</i>	135
<i>Patents</i>	136
LABELLING & LEGISLATION	160
FOS NEWS.....	163
<i>29 News articles</i>	163
CONTACTS.....	206
<i>11 contacts</i>	206
CONTACTS	210
SUMMARY	210
<i>Companies</i>	210
<i>Key Factors for Success</i>	210
<i>Health claims</i>	210
<i>Prices</i>	210
<i>Market Growth</i>	211
<i>Applications</i>	211
<i>Substitutes</i>	211
INULIN/FOS PRODUCERS/DISTRIBUTORS	212
<i>30 companies</i>	212
CUSTOMERS.....	221
<i>14 companies</i>	221
NEWS SUMMARY	255

TABLES

TABLE 1.	EVOLUTION OF THE GLOBAL MARKET FOR INULIN	30
TABLE 2.	TOTAL WORLDWIDE MARKET FOR INULIN	32
TABLE 3.	VALUE OF IMPORT MARKET (\$M) OF INULIN BY WORLD REGION	34
TABLE 4.	IMPORT VOLUME (KT) OF INULIN BY WORLD REGION	34
TABLE 5.	INULIN IMPORTS INTO THE USA	35
TABLE 6.	INULIN IMPORTED INTO THE USA	35
TABLE 7.	VALUE OF INULIN IMPORTED INTO CANADA.....	35
TABLE 8.	INULIN IMPORTED INTO THE USA.....	36
TABLE 9.	OLIGOSACCHARIDE PRODUCTION IN JAPAN	36

TABLE 10.	COMPANY X'S INULIN FAMILY	71
TABLE 11.	COMPANY X'S OLIGOFRUCTOSE FAMILY	72
TABLE 12.	INULIN, OLIGOFRUCTOSE (OF) AND FOS PRODUCTS CURRENTLY ON THE MARKET	81
TABLE 13.	PRODUCTS IN COMPANY 2'S RANGE	88
TABLE 14.	SUGGESTED INCORPORATION RATES FOR PRODUCTS 1 AND 2	90
TABLE 15.	SPECIFICATIONS OF PREODUCTS 2 AND 3	92
TABLE 16.	COMPANY X'S INULIN PRODUCT FAMILY	93
TABLE 17.	COMPANY X'S OLIGOFRUCTOSE PRODUCT FAMILY	94
TABLE 18.	COMPANY X'S INULIN AND OLIGOFRUCTOSE SYNERGY 1	94
TABLE 19.	TECHNOLOGICAL USES FOR INULIN	101
TABLE 20.	FAT REPLACERS FOR VARIOUS APPLICATIONS	101
TABLE 21.	EXAMPLES OF CARBOHYDRATE-BASED FAT REPLACERS DERIVED FROM STARCHES.....	104
TABLE 22.	EXAMPLES OF CARBOHYDRATE-BASED FAT REPLACERS DERIVED FROM NON-STARCH HYDROCOLLOIDS	105
TABLE 23.	EXAMPLES OF PROTEIN-BASED FAT REPLACERS	105
TABLE 24.	EXAMPLES OF MIXED-BLEND FAT REPLACERS.....	106
TABLE 25.	NUTRIENT CONTENT AND HEALTH CLAIMS FOR INULIN	162
TABLE 26.	EXAMPLES OF YOGHURT AND MOUSSE PRODUCTS IN THE UK CONTAINING INULIN	232
TABLE 27.	DETAILS OF COMPANY 1'S PLANT	253