

# NUTRITIVE SWEETENERS EU COMPETITIVE STRATEGY

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STRATEGIES TO GROW YOUR BUSINESS

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***In this case study, a regional sugar company engaged CPL Business Consultants to provide insights to inform its competitive strategy for the EU nutritive sweeteners market.***

The objective of this study was to help our client understand more about the sweeteners industry. The study compared and contrasted sugar production with starch industries and described the competitive position of glucose and fructose, separately and in blends, compared to sugar.

The study also considered the deregulation of the sugar regime and laissez-faire for iso-glucose. This included examining how existing producers protected themselves against changes in the sugar and starch regimes.

CPL discussed and analysed possible factors affecting the commercial development of liquid sweeteners, including inulin and fructose and gave strategic recommendations on how to compete in this market.

## **NUTRITIVE SWEETENERS EU COMPETITIVE STRATEGY**

### **Definitions and Properties of Nutritive or Calorific Sweeteners**

- Sucrose
- Glucose
- Fructose

### **Manufacturing Costs, Methods and Operating Criteria**

- The Production of Glucose-Sensitivity Cost Analysis
- Technology of Wheat Processing
- Vital Wheat Gluten
- Production of F-42 Syrups
- Capital Requirements
- The Green Field Site

## **Glucose and Fructose**

- Glucose sweeteners types, applications, production and operating techniques
- Production objectives
- Glucose Applications
- Dextrose
- Fructose Syrups Separately and in Blends
- Estimated Costs and Selling Prices
- The Value of Fructose
- The Starch Industry in the European Union
- History and Development
- Market Size
  - Maize
  - Wheat
  - Potato
- Multisourcing, Raw Materials and Flexibility
- Network Diversity and Aggregate Values
- Downstream Differentiation
- Industry Characteristics and Development
- Glucose and Fructose Market Sectors
- Overlaps Between the Sugar and Starch Industries

## **Present Regimes and Future Scenarios**

- The Sugar and Starch Regimes
- The Starch Regime – Current and Future Position of Production Refunds
- Future Scenarios
  - With little change over the next 4-5 years to existing regulations
  - With gradual change over 5-10 years
- Progressive Deregulation and Forces for Change in the Starch Industry – laissez faire for iso-glucose and other developments

## **An Analysis of European Starch Companies**

- The Dynamics of the Starch Industry
- Production, Ownership and Location of Starch Plants in the European Union

## **Nutritive Sweeteners Company Profiles**

### **Non-Starch Sources of Fructose**

### **Chromatography**

### **Comments on Sugar Replacement and the Use of Fructose Syrups**

### **Industry Views and Comments on Nutritive Sweeteners**

*A copy of the Table of Contents can be downloaded [here](#). In addition, please look at our [PowerPoint Introduction](#) and Brochure describing deliverables, differentiators and case studies. [Eight case studies](#) can also be reviewed.*