

## From Guilt to Growth with Rare Sugars: Unlocking a \$2.5+ Billion Market by 2030

### Rare sugar market:



### In 2025

1 in 9 adults has diabetes



1 in 5 adults is obese



### In 2030

1 in 9 adults will be diabetic



1 in 4 adults will be obese



### Rare sugars vs. *other alternative sweeteners*

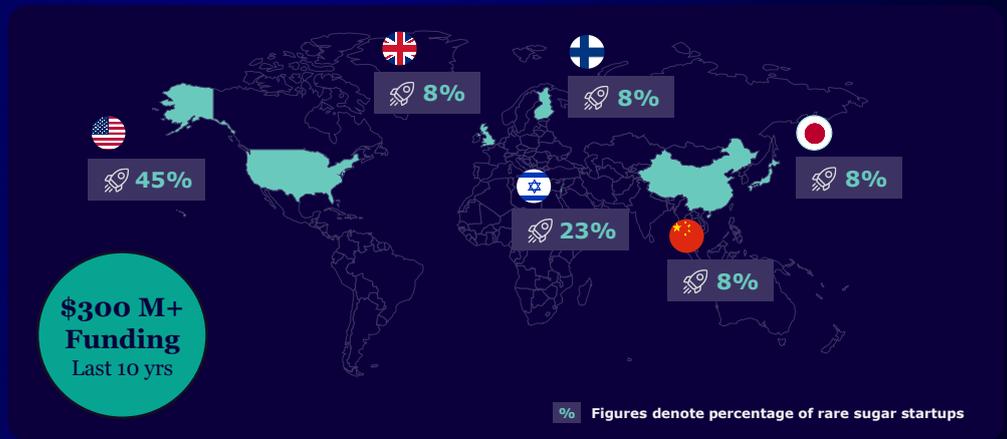
Low calorie bulking agent E.g., Xylitol, sorbitol, erythritol	Fibre-based sweetener E.g., Inulin, FOS	Naturally occurring sugars E.g., Allulose, tagatose	Plant-derived proteins E.g., Brazzein, thaumatin	Zero calorie synthetic and natural sweetener E.g., Stevia, sucralose
Calorie value 1.5-3 kcal/g	Calorie value 1.2 kcal/g	Calorie value 0.4-1.5 kcal/g	Calorie value ~0 kcal/g	Calorie value ~0 kcal/g
Glycemic index 0-35	Glycemic index ~0	Glycemic index 0-3	Glycemic index 0	Glycemic index ~0
Sweetness ☆☆☆	Sweetness ☆	Sweetness ☆☆☆☆	Sweetness ☆☆☆☆☆	Sweetness ☆☆☆☆☆
Aftertaste ☆☆	Aftertaste ☆☆☆☆	Aftertaste ☆	Aftertaste ☆☆☆☆	Aftertaste ☆☆☆☆
Shelf-stability ☆☆☆☆☆	Shelf-stability ☆☆☆☆	Shelf-stability ☆☆☆☆☆	Shelf-stability ☆☆☆	Shelf-stability ☆☆☆☆☆
Cost/kg ☆☆☆	Cost/kg ☆☆	Cost/kg ☆☆☆☆	Cost/kg ☆☆☆☆☆	Cost/kg ☆☆☆☆
<b>3/6</b>	<b>4/6</b>	<b>5/6</b>	<b>3/6</b>	<b>4/6</b>
☆☆☆☆☆☆	☆☆☆☆☆☆	☆☆☆☆☆☆	☆☆☆☆☆☆	☆☆☆☆☆☆

☆☆☆☆☆☆ Score for 6 parameters  
☆☆☆☆ High    ☆☆☆☆☆☆ Least attractive    ☆☆☆☆☆☆☆ Moderately attractive    ☆☆☆☆☆☆☆ Highly attractive

### Key drivers to transition from regular sugar:

- Sugar tax**  
115+ countries impose tax on SSB<sup>1</sup> and HFSS<sup>2</sup> foods
- Promotion bans**  
Buy 1 get 1 free price promotion curbed & marketing limits imposed
- Reformulation targets**  
≥10% reduction in sugar content of HFSS F&B
- Food Labeling**  
Color-coded food labels (red, amber, green) to indicate sugar, fat & salt content

### Rare sugars *startup hubs*



### Opportunity for *F&B* players

- Clean label reformulation**  
Meet BFY demand without compromising taste.
- Future-proof against regulations**  
Stay ahead of sugar taxes, and HFSS ad bans.
- Premium health positioning**  
Differentiate in functional, diabetic, and low-GI segments.
- Accelerate innovation**  
Partner with rare sugar startups to co-create

To schedule a 45-min complimentary analyst briefing, visit [www.futurescalex.com](http://www.futurescalex.com) or email: [contact@futurescalex.com](mailto:contact@futurescalex.com).