

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The Brazilian sugar and gum confectionery market is highly concentrated, with the top five operators accounting for more than 90% of the sales by volume and by value. However, the biggest share of new product launches comes from smaller companies, showing that the sugar confectionery market is highly fragmented in terms of NPD, which is good for competition and innovations."

— Andre Euphrasio, Research Analyst

This report looks at the following areas:

- Candies and health issues
- · Attracting older consumers to eat more candies

Smaller companies can try to win market share by launching innovative products with different flavors. The population is aging and they also eat less sugar and gum confectionery than younger consumers, so companies have to be creative to attract them.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Introduction

Definition

Abbreviations

Executive Summary

The market

Figure 1: Forecast of Brazil value sales of sugar and gum confectionery, 2009-19

Market drivers

Companies, brands, and innovation

Figure 2: Top 10 share of new product launches in the sugar confectionery market, by company, 2012-14

The consumer

Figure 3: Frequency of eating candies and gums, July 2014

What we think

Issues and Insights

Candies and health issues

The facts

The implications

Figure 4: Minus claims in new launches of sugar and gum confectionery, Brazil, 2013-14

Attracting older consumers to eat more candies

The facts

The implications

Figure 5: Sugarpova candy varieties - Quirky, Flirty, and Sporty varieties, 2014

Figure 6: Mentos Kiss limited retro edition, Brazil, November 2014

Figure 7: Other vintage-inspired packaging from the UK and Canada

Trend Application

Make it Mine

Play Ethic

East Meets West

Figure 8: Sugar confectionery kits by Kracie Foods, Japan, 2014

Figure 9: Alcohol flavored Japanese candies

Figure 10: Fiery Sriracha Candy Canes (J&D's Foods), and Smint Fruit Kiss (Chupa Chups), 2013

Figure 11: Fruit blend by Delícias do Tio Avô, November 2013; Marine algae jelly-style candies by Sweet Jelly, September 2014

Market Drivers

Key points

Rising sugar prices

Higher awareness of eating healthily

Space for premium products

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Who's Innovating?

Key points

The sugar and gum confectionery market is highly fragmented in terms of NPD

Figure 12: Top 10 share of new product launches in the sugar confectionery market, by company, 2012-14

Perfetti van Melle

Figure 13: New product launches by Perfetti van Melle, Brazil

Mondelez International

Innovative packaging for Trident

Figure 14: Trident spearmint gum in a newly designed bottle, Brazil, July 2014

Figure 15: Trident 14 units, Brazil, July 2014

Figure 16: Trident Unlimited by Mondelez, Brazil, June 2014

Halls venturing into chews

Figure 17: Halls Soft by Mondelez, Brazil, October 2013

Riclan

Figure 18: New product launches by Riclan, Brazil

Arcor

Figure 19: New product launches by Arcor, Brazil

Toffees and caramels are the leaders in new product developments

Figure 20: Share of new product launches in the sugar confectionery market, by type, 2012-14

Figure 21: Toffees, caramels, and nougat new product launches, Brazil

A wider variety of flavors

Figure 22: Top 15 share of new product launches in the sugar confectionery market, by flavor, 2012-14

Figure 23: New products containing peanut, Brazil

Figure 24: Brazilian flavor candies, Brazil

Figure 25: Dulce de leche flavored candies

Worldwide trends in the sugar and gum confectionery market

Stevia-sweetened candies

Figure 26: New sugar and gum confectionery products launched worldwide containing stevia, 2011-14

Figure 27: Examples of confectionery launched containing stevia

Figure 28: Dessert flavored candies

Coffee and tea flavors grow by 67% since 2011

Figure 29: Fruit-Tella coffee and cream flavored hard candy, new packaging, Perfetti van Melle, Brazil, October 2014

Figure 30: Coffee flavored candies by Riclan, Brazil, 2014

Market Size, Forecast, and Segment Performance

Key points

Worldwide sugar and gum confectionery market

Market performance

Figure 31: Forecast of Brazil value sales of sugar and gum confectionery, 2009-19 $\,$

Figure 32: Forecast of Brazil volume sales of sugar and gum confectionery, 2009-19

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Segment performance

Figure 33: Retail market segmentation of sugar and gum confectionery, by volume (000) tons, 2010-12

Figure 34: Retail market segmentation of sugar and gum confectionery, by value (R\$ bn), 2010-12

Future of the market

Forecast methodology

Market Share

Key points

Market share by volume and value

Figure 35: Leading companies' volume shares in the sugar and gum confectionery market, Brazil, 2011-12

Figure 36: Leading companies' value shares in the sugar and gum confectionery market, Brazil, 2011-12

A unique market

Companies and Brands

Mondelēz Brasil

Product range

Advertising and marketing

Operational issues

Ferrero

Product range

Advertising and marketing

Operational issues

Grupo Arcor

Product range

Advertising and marketing

Operational issues

Riclan

Product range

Advertising and marketing

Operational issues

The Consumer – Frequency of Eating Candies and Gums

Key points

Candies and gums are eaten by the majority

Figure 37: Frequency of eating candies and gums, July 2014

Drops are Brazilians' favorite sugar and gum confectionery

Figure 38: Frequency of eating candies and gums, July 2014

Peanut candies are the favorite of over-55s

Figure 39: Frequency of eating candies and gums, by age, July 2014

The Consumer – Place of Purchase

Key points



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 40: Place of purchase, July 2014

Supermarkets and bakeries lead the way on purchase locations

Figure 41: Place of purchase, supermarket, by region, July 2014

Figure 42: Place of purchase, bakery, by region, July 2014

Bombonieres

Figure 43: Place of purchase, bomboniere, by region, July 2014

Newsstands are favored for daily eaters

Figure 44: Place of purchase, newsstands, by region, July 2014

Specialist stores are mainly used in the South-East

Rock Candy

Papabubble

happypills

The Consumer – Purchase Influencing Factors

Key points

Figure 45: Purchase influencing factors, July 2014

Favorite flavors are more important than new ones

Figure 46: Examples of products containing more than one flavor per package

Figure 47: Mentos Tropical Rainbow, by Mondelez, Japan 2014

Figure 48: Purchase influencing factors, by gender and by age, July 2014

Figure 49: Star fruit, lemon, and lime flavored candy, by Fini Regaliz, Brazil June 2014

Reduced sugar/sugar-free varieties

Figure 50: Purchase influencing factors, July 2014

Premium assortment

Figure 51: Premium products by Arcor, Brazil, 2014

Figure 52: Alcohol flavored candies

The Consumer – Attitudes and Behaviors toward Candies and Gums

Key points

Figure 53: Attitudes and behaviors toward candies and gums, July 2014

Nearly a third worries about candies being unhealthy

Figure 54: Attitudes and behaviors toward candies and gums, by gender, July 2014

Discovering new flavors

Figure 55: Dulce de leche candies mixed with Brazilian fruits

Brand loyalty decreases with age

Figure 56: Attitudes and behaviors toward candies and gums, by gender and by age, July 2014

Appendix - Market Size and Forecast

Figure 57: Additional best case/worst case for value, 2014-19

Figure 58: Additional best case/worst case for volume, 2014-19

Figure 59: Value sales for sugar and gum confectionery, 2009-2019

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 60: Volume of sugar and gum confectionery, 2009-2019

Appendix - The Consumer - Frequency of Eating Candies and Gums

Figure 61: Frequency of eating candies and gums, July 2014

Appendix - The Consumer - Place of Purchase

Figure 62: Place of purchase, July 2014

Figure 63: Frequency of eating candies and gums, by most popular place of purchase, July 2014

Figure 64: Frequency of eating candies and gums, by next most popular place of purchase, July 2014

Appendix – The Consumer – Purchase Influencing Factors

Figure 65: Purchase influencing factors, July 2014

Appendix - The Consumer - Attitudes and Behaviors toward Candies and Gums

Figure 66: Attitudes and behaviors toward candies and gums, July 2014

Repertoire

Figure 67: Repertoire of eating candies and gums, July 2014

Figure 68: Frequency of eating candies and gums, by repertoire of eating candies and gums, July 2014

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100