

Biscuits, Cookies and Crackers - China - March 2016

Report Price: £2463.80 | \$3990.00 | €3129.79

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



“Their convenience and filling nature enable biscuits to be competitive within the breakfast occasion. Breakfast biscuits should focus on taste and nutritional richness. Consumers are drawn to breakfast biscuits with coatings/fillings and nuts/fruits bits. Snack-like biscuits could take bold steps in flavour, colour and shape innovation.”

Karen Liu, Senior Research Analyst

This report looks at the following areas:

- How biscuits tap into breakfast occasions
- What types of snacking biscuits do people like?
- Paring biscuits with drinks/other foods to create fusion experience

What you need to know

Their convenience and filling nature enable biscuits to be competitive in breakfast occasions. Breakfast biscuits should focus on taste and nutrition, with domestic manufacturers taking bold innovations forward in the breakfast biscuits segment through fillings/coatings and nuts/fruits bits. 'Energy' is not a good selling point due to misconceptions among consumers.

Food pairing and fusion experience will help to overcome the dry-texture drawback of the category. Packaging innovation and creative communication ideas are recommended anchor points for marketers.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+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

Biscuits, Cookies and Crackers - China - March 2016

Report Price: £2463.80 | \$3990.00 | €3129.79

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

Table of Contents

Overview

What you need to know

Products covered in this report

Figure 1: Definition of low/mid/high MHI groups, by city tier

Executive Summary

The market

Figure 2: Total China biscuits market retail volume, 2010-20

Figure 3: Total China biscuits market retail value, 2010-20

Key players

Figure 4: Value share of top 10 companies, 2013-15

The consumer

Biscuits strongly associated with hunger filling, but are less competitive in offering health benefits

Figure 5: Perception towards different types of snacks, December 2015

Sandwich biscuits, cookies and waffles are most popular biscuits types

Figure 6: Usage of biscuits, December 2015

Hunger filling and snacking are key occasions to eat biscuits

Figure 7: Eating occasions of different types of biscuits, December 2015

Encouraging pairing eating overcomes the biscuits' drawbacks

Figure 8: Eating habits, by consumers who claim "biscuits are too dry when eating", December 2015

Breakfast biscuits should have a rich taste, be nutritional and low in calories

Figure 9: Ideal breakfast biscuits, December 2015

Imported biscuits win through better taste and higher quality

Figure 10: Attitudes towards imported biscuits, by usage of imported biscuits, December 2015

New flavours, colours and shapes of biscuits are expected

Figure 11: Attitudes towards biscuits innovation, by attitude towards biscuits, December 2015

What we think

Issues and Insights

How biscuits tap into breakfast occasions

The facts

The implications

Figure 12: Top 10 claims of new breakfast biscuits, China and global, 2013-15

Figure 13: Top 10 flavours of new breakfast biscuits, China and global, 2013-15

What types of snacking biscuits do people like?

The facts

The implications

Figure 14: Biscuits launched by chocolate confectionary brands, UK, 2014

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Biscuits, Cookies and Crackers - China - March 2016

Report Price: £2463.80 | \$3990.00 | €3129.79

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

Paring biscuits with drinks/other foods to create fusion experience

The facts

The implications

Figure 15: Ezaki Glico Group and Kirin Beverage packs, Japan, 2015

The Market — What You Need to Know

The growth of the biscuits market is slowing down

The market continues to grow at a CAGR of 5%

Sweet biscuits segment drives the market growth

Snack-like biscuits encourage premiumisation

Healthy eating trend hinders growth

Market Size and Forecast

The growth of biscuits market is slowing down

Figure 16: Retail market size of biscuits in China, 2010-15

The market is forecast to grow at a CAGR of 5%

Figure 17: Total China biscuits market retail volume, 2010-20

Figure 18: Total China biscuits market retail value, 2010-20

Market drivers

Increasing disposable income

Figure 19: Per capita disposable income, China, 2010-14

Fast-moving lifestyles push city dwellers to seek convenient foods

Snack-like biscuits encourage premiumisation

Healthy eating trend drives consumers away from eating biscuits

Market Segmentation

Active new product development drives the shifting popularity of sweet biscuits

Figure 20: Value of biscuits market in China, by segment, 2010-15

Sweet biscuits segment continues to grow quicker

Figure 21: Value of sweet biscuits segment, 2010-20

Figure 22: Value of savoury biscuits segment, 2010-20

Key Players — What You Need to Know

China biscuits market is fragmented

Mondelēz tapping into breakfast market

Manufacturers are innovating in flavours, convenience and social media communication

Market Share

A fragmented market

Figure 23: Value share of top 11 companies, 2013-15

Snack-like biscuits companies continue to gain share

Mondelēz rebounded in 2015 after poor performance during 2012-14

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Biscuits, Cookies and Crackers - China - March 2016

Report Price: £2463.80 | \$3990.00 | €3129.79

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

Cookies brands are dark horses

Competitive Strategies

Mondelēz tapping into breakfast market

Figure 24: Examples of BelVita on-pack claim (mixed-berry flavour), China and global, 2015

Top players strengthen execution

Mondelēz invests in TV advertising and free sampling for BelVita

Danisa surpassed Kjeldsens in sales in 2014 due to strong trade execution

Foreign brands embrace E-commerce to enter China market

Who's Innovating?

Manufacturers dedicated to increasing flavours

Figure 25: Top 10 flavours of new biscuits, China, 2013-15

Figure 26: Emerging flavours of biscuits, China, 2013-15

Convenience features increase to fit fast-moving lifestyles

Manufacturers invest in convenient packaging

Figure 27: Top 10 claims of new biscuits, China, 2013-15

Figure 28: Example of "convenient" biscuits, China, 2015

On-the-go positioning calls for more launches

Figure 29: Top 10 countries of new biscuits with on-the-go claim, global, 2013-15

Figure 30: Biscuits with on-the-go claim, global, 2015

Manufacturers leverage social media to get in touch with consumers

Snack-like biscuits are bold innovation globally

Dessert-inspired flavours invade

Figure 31: Dessert-inspired biscuits, global, 2015

New colours and shapes are eye-catching

Figure 32: Example of biscuits with unique shapes, Japan, 2015

Figure 33: Example of biscuits with unique colours, global, 2015

Breakfast biscuits could be filled/coated

Figure 34: Example of breakfast biscuits, global, 2015

Ancient grains are emerging ingredients

Figure 35: Example of biscuits containing ancient grains, global, 2015

The Consumer — What You Need to Know

Biscuits are evolving into snack foods

Occasion extension could drive more consumption

Encourage pairing eating methods

Breakfast biscuits should be rich in taste, full in nutrition and low in calories

Perception towards Different Types of Snacks

Biscuits strongly associated with filling up

Figure 36: Perception towards different types of snacks, December 2015

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Biscuits, Cookies and Crackers - China - March 2016

Report Price: £2463.80 | \$3990.00 | €3129.79

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

Consumers like the taste of biscuits

Biscuits are less competitive in delivering health benefits

Usage of Different Types of Biscuits

Sandwich biscuits, cookies and waffles are most popular biscuits types

Figure 37: Usage of biscuits, December 2015

Females and young people explore unusual biscuits types

Figure 38: Usage of biscuits, by gender and age, December 2015

Northern and Southern China eat more biscuits

Figure 39: Usage of biscuits, by region, December 2015

Eating Occasions of Biscuits

Hunger filling and snacking are key occasions for eating biscuits

Figure 40: Eating occasions of different types of biscuits, December 2015

Opportunities to extend eating occasions

Figure 41: Eating occasions of different types of biscuits, by repertoire (one occasion), December 2015

Eating Methods of Biscuits

Dairy products are popular biscuits companions

Figure 42: Eating methods of biscuits, December 2015

Figure 43: Eating biscuits with dairy products, by cities, December 2015

Pairing biscuits with different types of drinks

Figure 44: Eating methods of biscuits, by consumers who claim "biscuits are too dry when eating", December 2015

Figure 45: Eating biscuits with coffee, by cities, December 2015

Wealthy people eat biscuits with cheese and dipping sauces

Figure 46: Eating biscuits with cheese and dip sauces, by income, December 2015

Figure 47: Ritz Crackers 'n Cheese Dip by Kraft, Mexico, 2014

Ideal Breakfast Biscuits

Sweet and crispy biscuits are preferred

Figure 48: Ideal breakfast biscuits, December 2015

Figure 49: Ideal breakfast biscuits, by age, December 2015

Consumers favour biscuits with bits and fillings/coating

Figure 50: Ideal breakfast, December 2015 (continued)

Figure 51: Ideal breakfast, by age and gender groups, December 2015

Rich nutrition is wanted, but not high calories

Figure 52: Ideal breakfast biscuits, December 2015 (continued)

Small packaging fits well with on-the-go eating occasions

Figure 53: Ideal breakfast biscuits, December 2015 (continued)

Attitudes towards Biscuits

Imported biscuits win by better taste and higher quality

Figure 54: Attitudes towards imported biscuits, by usage of imported biscuits, December 2015

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Biscuits, Cookies and Crackers - China - March 2016

Report Price: £2463.80 | \$3990.00 | €3129.79

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

Figure 55: Top 10 flavours of biscuits, China and top popular imported countries, 2013-15

New flavours, colours and shapes of biscuits are expected

Figure 56: Attitudes towards biscuits innovation, December 2015

Figure 57: Attitudes towards biscuits innovation, by attitude towards biscuits, December 2015

Meet the Mintropolitans

Mintropolitans eat biscuits as treats

Figure 58: Usage of biscuits, by consumer classification, December 2015

Mintropolitans eat biscuits with coffee and cheese

Figure 59: Eating methods of biscuits, by consumer classification, December 2015

Mintropolitans favour buttery-tasting breakfast biscuits

Figure 60: Preferred mouth feeling of ideal breakfast biscuits, by consumer classification, December 2015

Appendix – Market Size and Forecast

Figure 61: Retail value sales of biscuits, by segment, 2010-20

Figure 62: Retail volume of biscuits, by segment, 2010-20

Appendix – Market Segmentation

Figure 63: Retail value sales of savoury biscuits, China, 2010-20

Figure 64: Retail volume of savoury biscuits, China, 2010-20

Figure 65: Retail value sales of sweet biscuits, China, 2010-20

Figure 66: Retail volume of sweet biscuits, China, 2010-20

Appendix – Methodology and Abbreviations

Methodology

Fan chart forecast

Why Mintropolitans?

Who are they?

Figure 67: Demographic profile of Mintropolitans vs Non-Mintropolitans, by gender, age and personal income

Figure 68: Demographic profile of Mintropolitans vs Non-Mintropolitans, by marital status, city tier and education level

Abbreviations

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com