

## Consumer and Market Insights: Savory Snacks Market in Brazil

**CS1774MF**  
**Sample Pages**  
March 2015



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# Reasons to buy this report

This report brings together consumer analysis and market data to provide actionable insight into the behavior of consumers. This is based on Canadean's unique consumer data – developed from extensive consumption surveys and consumer group tracking – which quantifies the influence of 20 consumption motivations within your industry.

## Consumer trends analysis

An overview of the key demographic groups driving consumption in your industry, and what their motivations are for doing so. This enables the reader to identify the most important trends within the market and also determine whether beliefs over what influences consumer behavior within the category are accurate.

## Market sizing

Market value and volumes are given over 2009–2019 for 10 leading countries across the globe. Coverage includes major European markets, the US, and the emerging markets of Brazil, Russia, India, and China.

## Demographic analysis

Key demographic groups driving consumption within the Brazilian market are identified. The figures showcase the number of Savory Snacks occasions attributed to specific age groups and genders, as well as identifying whether these demographic groups "over" consume in the category. Overall and private label consumption is analyzed.

## Product innovation examples

Examples are provided of innovative international and country-specific product development within your industry, with analysis of how these products effectively target the most pertinent consumer need states.

## Recommended actions

Strategic recommendations of how to capitalize on the evolving consumer landscape are offered, allowing product and marketing strategies to be better aligned with the leading trends in the market.

## Future outlook

The report provides insight to highlight the "so what?" implications behind the data, and analysis of how the need states of consumers within your industry will evolve in the short-to-medium term future.

# Canadae has identified nine mega-trends that drive consumer choice and these can be broken down into 20 sub-trends



- MEGA-TRENDS:**
- CHANGING LIFESTAGES
  - CONNECTIVITY
  - CONVENIENCE
  - ETHICS
  - EXPERIENCE & ENJOYMENT
  - HEALTH & WELLNESS
  - INDIVIDUALITY
  - TRUST
  - VALUE

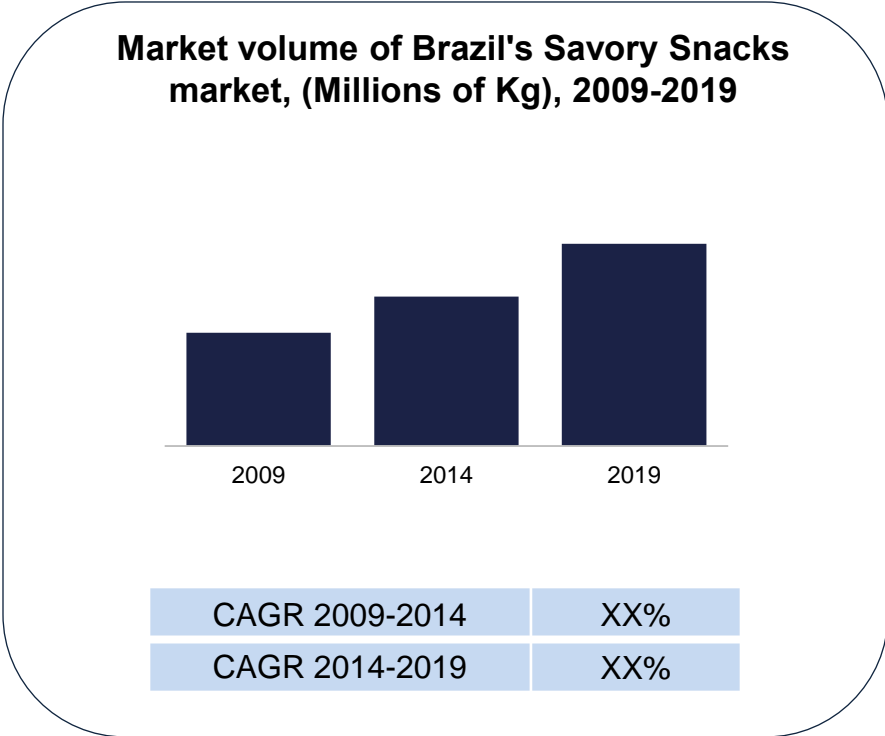


# Brazil's Savory Snacks market is forecast to register higher value and volume growth during 2014-2019 when compared to 2009-2014

- The retail sales growth in the Savory Snacks market in Brazil was high in both value and volume terms during 2009-2014. While it grew at CAGR of XX% in terms of value, volume growth during 2009-2014 was recorded at a CAGR of XX%.
- The volume consumption of Savory Snacks is forecast to grow from XXX Kg million in 2014 to XXX Kg million in 2019. The large young population and increasing middle class are aiding the growth of Savory Snacks consumption in the country.


**Market value of Brazil's Savory Snacks market, 2009-2019**

	BRL million	US\$ million
2009	XXXX	XXXX
2014	XXXX	XXXX
2019	XXXX	XXXX
CAGR 2009-2014	XX%	XX%
CAGR 2014-2019	XX%	XX%

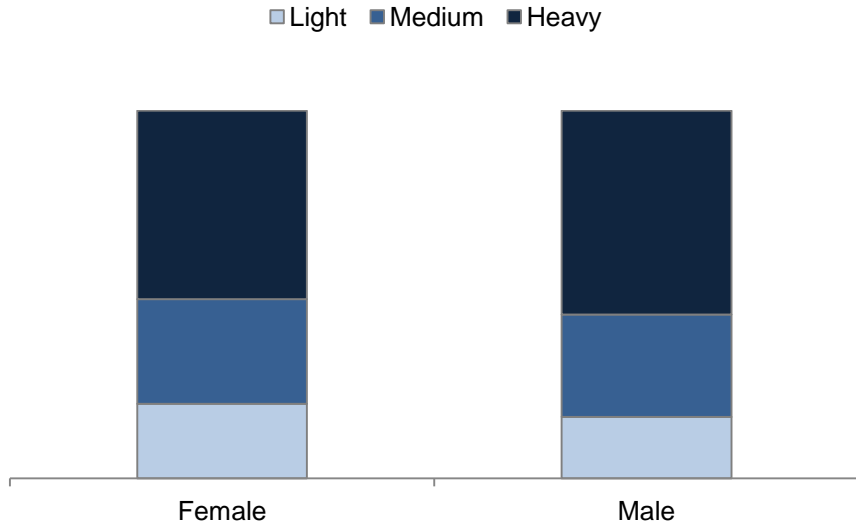


# Both Brazilian men and women consume Savory Snacks at a 'heavy frequency'

Canadean has also broken down **Savory Snacks** consumption in **Brazil** by type of consumption:

	<b>Light consumption</b> XX consumption occasions per week		<b>Medium consumption</b> XX consumption occasions per week		<b>Heavy consumption</b> XX consumption occasions per week
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**Breakdown of consumption by whether it is the result of heavy, medium, or light consumption, by gender, 2013**



Both Brazilian men and women to follow a similar pattern of consumption with more than half of consumption being driven by 'heavy frequency' consumption. However, there is still a significant proportion of consumption from low and medium frequency' users, which manufacturers can target by launching more innovative products with regional/international flavors to increase consumption frequency.

The heavy consumption frequency for the top three categories by value is 1.5 times for Processed Snacks, and 0.3 times per week for the Nuts & Seeds and Potato Chips categories.

# The Personal Space & Time trend influences US\$XXX million worth of Savory Snacks consumption in Brazil per annum

The **Personal Space & Time** trend influences **XX Kg** million of volume sales in Brazil

This accounts for **XX%** of all volume consumption within the category

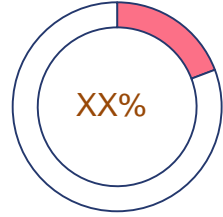
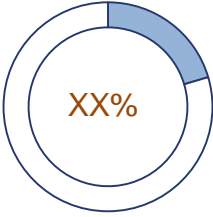
### Influence of trend by category:

Ethnic/traditional Snacks: **XX%**  
Potato Chips: **XX%**

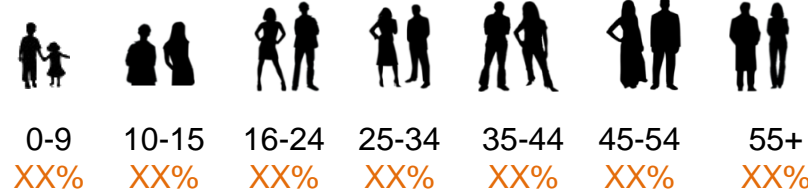
Meat Snacks: **XX%**  
Pretzels: **XX%**

Nuts & Seeds: **XX%** Popcorn: **XX%**  
Processed Snacks: **XX%**

### Gender



### Age group



**\$XXX US million**  
**XX Kg million**

### Income

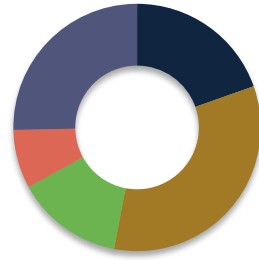
*% of consumption by income bracket*



- Affluent
- Better Off
- Moderate Income
- Hard Pressed
- Rather Not Say

### Leisure time

*% of consumption by amount of leisure time*



- 0-1 hours
- 1-3 hours
- 3-5 hours
- 5-7 hours
- 7+ hours

# Daily pressures drive Brazilian consumers to look for products that offer a relaxing break

## Brazilian consumers are looking for moments of escapism

Savory Snacks are acting as coping mechanisms that help Brazilian consumers to face stressful times. These products play an important role when consumers look for treats and rewards after days full of work and family commitments.

Brazil is a developing country that has been through political instability and economic insecurity, and consumers have been concerned about the country situation. Even though this uncertainty has somewhat lessened, feelings of indecision and mistrust have stayed among consumers. As a consequence, they experience stress and tension that influence their mental wellbeing.

In order to cope with these emotions and reactions, Savory Snacks can offer consumers a temporary moment of escape making the day more pleasant and enjoyable. Brazilian consumers seeking a way to relax and unwind tend to acquire products such as popcorn or processed snacks. In fact, the Personal Time & Space trend influences XX% of the consumption of popcorn and XX% of potato chips. This indicates that marketers can further cater to this need by introducing products highlighting the satisfaction that they offer through their taste and sensations. Additionally, Savory Snacks can be positioned around individual occasions, such as watching TV shows at night time to forget daily commitments.

## Highlighting formulation to provide the best sensation



Elma Chip Sensações presents thin potato chips with a touch of olive oil that gives a distinctive texture. This combination provides a gourmet sensation every day

## Snacks ideal for eating with shows

Popcorn is a snack often consumed during personal relaxation times. Yoki offers toffee popcorn for relaxing moments watching television



# What trends will increase in importance over the next 10 years?

Canadean predicts that the following secondary drivers will rise in importance over the next decade to become increasingly influential motivators of consumption within the market.



The combination of professional and family duties means that **Busy Lives** will drive Savory snack consumption in Brazil. Long journeys to the workplace, along with the increase of working hours, will lead Brazilian consumers to look for little breaks where they can relax. Additionally, consumers will have less time to spend with their family, and they will try to have as much pleasure as they can while with their loved ones. Savory snack marketers should position their products providing the most pleasure in the shortest amount



The **Experience Seeking** relates to the idea that consumers will become more aware about other cultures, beliefs, and behaviors thanks to advances in media technology. They will be inclined to explore new worlds and the food will become a way to do it. In this regard, the Savory snack industry should offer flavored potato chips or popcorn that help consumers to taste different flavors from around the world. For example, Cheetos has launched processed snack with Swiss cheese potato flavor.



Brazilians are becoming more concerned about their individual needs. This **Individualism** trend will drive food consumption, and Savory Snacks as well. With a more health-conscious population, Brazilian marketers should offer a range of Savory snacks that meet individual needs, such as gluten-free crisps or low in salt processed snacks. Consumers who care about their nutritional intake will be prone to acquire products that suit their personal requests. For instance, the presence of Savory Snacks with fewer additives will satisfy consumer's desires for more individual dietary needs.

This report is comprised of two data research programs

## MARKET DATA

- **Method:** Analyst triangulation of consensus numbers based upon comprehensive primary and desk research as part of an international research programme.
- **Coverage:**
  - 50 Countries fully researched
    - Category and segment breakdown
    - 8 channels
    - Value and Volume data
  - Internationally comparable data
  - 100% standardized definitions

## CONSUMER DATA

- **Method:** Extensive consumption surveys and consumer group tracking with strict age and gender quotas to ensure nationally-representative results.
- **Coverage:**
  - 10 Countries
  - 20 Consumer Trends
  - 26 Consumer Groups
  - Category breakdown
  - Integrated market sizing at the country and category level
  - Interim 2013 Consumer data generated by mapping 2013 Market size data onto 2012 Consumer data consumption values

Details on the methodology for both of these research programs can be found in the Appendix.



## Successful New Product Development Strategies in the Food, Drinks and Personal Care Market

Canadean has studied the best new product development, cross-category innovation, and marketing campaigns in both developing and developed countries to find common themes and best practice. The evolution of consumption habits across the world means both retailers and manufacturers need a renewed understanding of consumers' changing lifestyles, and how this will affect their product choices. The report highlights innovative new product development, and offers strategic recommendations to capitalize on the evolving motivations driving consumption.



## Global Mega-Trends: Understanding evolving consumer attitudes and behaviors when it comes to Health and Wellness

Attitudes to beauty and health are evolving worldwide: consumers are becoming more image conscious, they're concerned about heart health and cancer, and they're becoming more open when it comes to the issue of mental wellbeing. Understanding the regional differences between these attitudes will pin point opportunities for brands to better target key consumer need states, which will improve the success rate of new product launches, and identify gaps in the market before anyone else.



## Consumer and Market Insights: Dairy Market in France

The Dairy market in France was worth EUR26,804.4 million (US\$35,574.4 million) in 2014, and is forecast to register a CAGR of 2.5% in local currency terms during 2014-2019 to reach EUR30,260.1 million (US\$36,401.6 million) in 2019. Consumers aged 55 and over account for almost a third of all Dairy consumption occasions: meeting their desire for indulgent products will help companies grow their share of the market.