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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.

**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.

**Demographic analysis**
Key demographic groups driving consumption within the Chinese 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.

**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.
Canadean has identified nine mega-trends that drive consumer choice and these can be broken down into 20 sub-trends.
China’s Savory Snacks market is forecast to register high value and volume growth during 2014-2019

- The Chinese Savory Snacks market, grew at a CAGR of XX% in value terms during 2009-2014, higher than the volume CAGR of XX% during the same period. Increasing income levels and consumers’ busy lifestyles are driving the growth of the Chinese Savory Snacks market.

- The growth of Savory Snacks in volume terms is forecast to grow from XXX Kg million in 2014 to XXXX Kg million in 2019, at a CAGR of X.X% helped by steady rising per capita consumption levels.

### Market value of China’s Savory Snacks Foods market, 2009-2019

<table>
<thead>
<tr>
<th>Year</th>
<th>CNY million</th>
<th>US$ million</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>XXXXX</td>
<td>XXX</td>
</tr>
<tr>
<td>2014</td>
<td>XXXXX</td>
<td>XXX</td>
</tr>
<tr>
<td>2019</td>
<td>XXXXX</td>
<td>XXX</td>
</tr>
</tbody>
</table>

### Market volume of China’s Savory Snacks Foods market, (Millions of Kg), 2009-2019

<table>
<thead>
<tr>
<th>Year</th>
<th>CAGR 2009-2014</th>
<th>CAGR 2014-2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>XX%</td>
<td>XX%</td>
</tr>
<tr>
<td>2014</td>
<td>XX%</td>
<td>XX%</td>
</tr>
<tr>
<td>2019</td>
<td>XX%</td>
<td>XX%</td>
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</tbody>
</table>
Chinese Males are ‘heavy frequency’ consumers of Savory Snacks

Canadean has also broken down Savory Snacks consumption in China by type of consumer:

<table>
<thead>
<tr>
<th>Light consumption</th>
<th>Medium consumption</th>
<th>Heavy consumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>XX consumption occasions per week</td>
<td></td>
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<td>XX consumption occasions per week</td>
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Breakdown of consumption by whether it is the result of heavy, medium, or light consumption, by gender, 2013

Though both Men and Women in China consume Savory Snacks products at a heavy frequency, males have a higher proportion of heavy frequency consumption. This implies that men have a higher preference for quick and easy foods such as Savory Snacks compared to women. The significant share of medium frequency consumption of Savory Snacks among both men and women provides opportunities to manufacturers to launch Savory Snacks products with new and innovative flavors and ingredients.

The heavy consumption frequency for the top three categories by value is XX times per week for Processed Snacks, XX times per week for Ethnic/Traditional Snacks, and XX times per week for the Potato Chips category.
The Trust trend influences $XX billion worth of Savory Snacks consumption in China per annum

The Trust trend influences XXXX Kg million of volume sales in China

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

Influence of trend by category:

Ethnic/Traditional Snacks: XX%
Meat Snacks: XX%
Nuts & Seeds: XX%
Popcorn: XX%
Potato Chips: XX%
Pretzels: XX%
Processed Snacks: XX%

Gender:

Age group:

Income:

% of consumption by income bracket:
- Highly 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
Concerns over ingredients, manufacturing and production will affect Savory Snack consumption

High profile health scares are affecting consumption behavior in China

Trust is the third most influential motivator of Savory Snacks consumption in China, and at XX% it is the market most driven by this need across the EU, the US, and BRIC countries. The high emphasis placed on trust stems from a number of high-profile health scares that have affected consumer behavior, with concerns rising over the safety of products, particularly those going through a heavy manufacturing process within the country itself.

The issue is particularly prevalent in Meat Snacks, at 19.9%, as scandals regarding the use of rat meat being sold as lamb and numerous cases of avian influenza, have all increased public mistrust across food categories in general. Manufacturers have recently attempted to reassure worried consumers by becoming more open about their ingredient-sourcing and production methods.

Products emphasizing stringent levels of quality in safer packaging will continue to drive sales. Packaging is increasingly playing an important role in gaining trust among consumers. Sealed, foil packaging allow the consumers to feel reassured that the product it houses has been kept fresh and at a high standard from the moment it was produced.

Consumers want to be able to trust the packaged goods they’re consuming

After recent Meat Snack scandals, these flavored beef cubes from Wah Yuen, packaged safely from a reputable manufacturer, appeal to consumers who place a great emphasis on product safety and guaranteed manufacturing methods.

Packaging innovations can assure consumers products have been kept fresh

These Organic Chestnuts from Shen Li are in a re-sealable foil packaging in order to keep the product fresh. The organic nature of the product also implies to consumers it has been produced in a safe environment.
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 Snacks consumption in China. Long journeys to the work place, along with the increase in working hours, will lead Chinese consumers to seek out short breaks where they can relax. Additionally, consumers will have less time to spend with their family, and they will try to have as much time as they can while with their loved ones. Savory Snack marketers should position their products as providing the most pleasure in the shortest amount of time.

Modern China is witnessing a **Changing Lifestages** movement: there are more single households, as consumers delay having families until later in life, prioritizing their careers and enjoying a prolonged period of kidulthood. This will lead to a greater demand for single-serve portions, which make consumption more convenient, while reducing food waste. When consumers have families, they will turn to multipacks to save money via bulk buys as well as the amount of shopping trips required.

The **Individualism** trend will drive food consumption, especially Savory Snacks. With a more health-conscious population, Chinese marketers should offer a range of Savory Snacks that meet their individual needs, such as gluten-free potato snacks or low salt processed snacks. Consumers who care about their nutritional intake will acquire products that suit their personal needs. For instance, the presence of Savory Snacks with fewer additives will satisfy consumer desires for more individual dietary needs.
Summary Methodology

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.