

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

**CS1785MF**  
**Sample Pages**  
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# Table of contents

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## **Introduction**

- Classifications and definitions
- Methodology

## **Market Overview**

- Macroeconomic indicators – Population and age structure, GDP and Consumer Price Index
- National retail and foodservice figures – Key Takeouts
- Market value and volume for the German Savory Snacks market
- Historical and projected consumption in the German Savory Snacks market
- Comparison of the German Savory Snacks market to other key countries
- Market volume of German Savory Snacks by category
- Historical and projected market value of German Savory Snacks by category
- Winners and losers in the German Savory Snacks market
- Segment share of the category and change in market share in the German Savory Snacks market
- Penetration of private label, by categories, in the German Savory Snacks market
- Private label performance compare to national brands in the German Savory Snacks market
- Leading companies in the German Savory Snacks market by category
- Leading brands in the German Savory Snacks market by category

## **Retailer and packaging**

- Leading retailers in the German food market
- Leading distribution channels in the German Savory Snacks market
- Leading distribution channels by category in the German Savory Snacks market
- German Savory Snacks market by type of packaging
- German Savory Snacks market by type of packaging closure/outer
- German Savory Snacks market by type of packaging, forecasted

# Table of contents

---

## **Demographic cohort consumption patterns**

- Overall consumption occasions by age and gender in the German Savory Snacks market
- Private Label consumption occasions by age and gender in the German Savory Snacks market
- Under/Over-consumption levels in the German Savory Snacks market by gender and age
- Consumption frequency by type of consumer in the German Savory Snacks market by gender and age
- Private label consumption by age and gender and comparison to overall consumption levels in the German Savory Snacks market

## **Consumer trend analysis**

- Degree of influence that consumer trends have on volume consumption in the German Savory Snacks market
- Market volume of the German Savory Snacks market by category and trend
- For leading trends in the German Savory Snacks market
  - Degree of influence trend has on volume by consumption by key demographic
  - How the trend is influencing consumption in the German Savory Snacks market
  - How to target the trend in the German Savory Snacks market
  - How the trend will evolve in the German Savory Snacks market

## **Innovation examples**

- New product example launches in the German Savory Snacks market
- New product example launches in the global Savory Snacks market

## **Actions and Recommendations**

- How to successfully target key trends in the German Savory Snacks market

# Table of contents

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## Appendix

- Country context
- Sector overview
- Category data
- Segment data
- Packaging data
- Category definitions
- Segment definitions
- Channel definitions
- An explanation of the sub-trends
- Methodology notes
- About Canadean

# List of figures

## List of Figures

- Figure 1: Macro economic analysis: GDP per capita, Population , CPI (2009-2014), Age Profile (2014)
- Figure 2: Foodservice transactions by sectors, profit and cost, 2014
- Figure 3: Market value (EUR, USD) and volume analysis, 2009-2019
- Figure 4: Market volume share analysis by categories, 2014
- Figure 5: Consumers purchase behavior - Trading up/down, 2014
- Figure 6: Growth analysis by category, 2009-2019
- Figure 7: Change in market share by category, 2014-2019
- Figure 8: Private label penetration by categories, 2014
- Figure 9: Private label and brand share growth, 2011-2014
- Figure 10: Leading companies by categories with market share, 2014
- Figure 11: Leading brands by categories with market share, 2014
- Figure 12: Leading distribution channels, overall food, 2010-2013
- Figure 13: Leading distribution channels by category, 2014
- Figure 14: Packaging analysis – key packaging material, type, closure and outer, 2014
- Figure 15: Growth in key packaging material, type, closure and outer, 2014-2019
- Figure 16: Consumption occasions by gender and age, 2013
- Figure 17: Private label occasions by gender and age, 2013
- Figure 18: Heavy, medium, or light consumption by gender, 2013
- Figure 19: Heavy, medium, or light consumption by age, 2013
- Figure 20: Private label consumption by age group compared to overall market consumption by age, 2013
- Figure 20: Influence of a trend on consumption - by gender, age, income group and leisure time
- Figure 21: Innovative new product launch – global and country specific

# List of tables

---

## List of tables

Table 1: Country Indicators – overall food value and volume, 2014

Table 2: Market value analysis in EUR and USD, 2009-2019

Table 3: Market volume growth analysis, 2014-2019

Table 4: Inter-country volume and growth analysis, 2009-2019

Table 5: Average prices (EUR) by category, 2014

Table 6: Segment level analysis by category, 2014

Table 7: Leading retailers and store count

Table 8: Over/ under consumption by gender and age, 2013

Table 9: Level of influence of a consumer survey trend on consumption by volume, 2013

Table 10: Level of influence of a consumer survey trend on consumption by category volume, 2013

# 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 German 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.

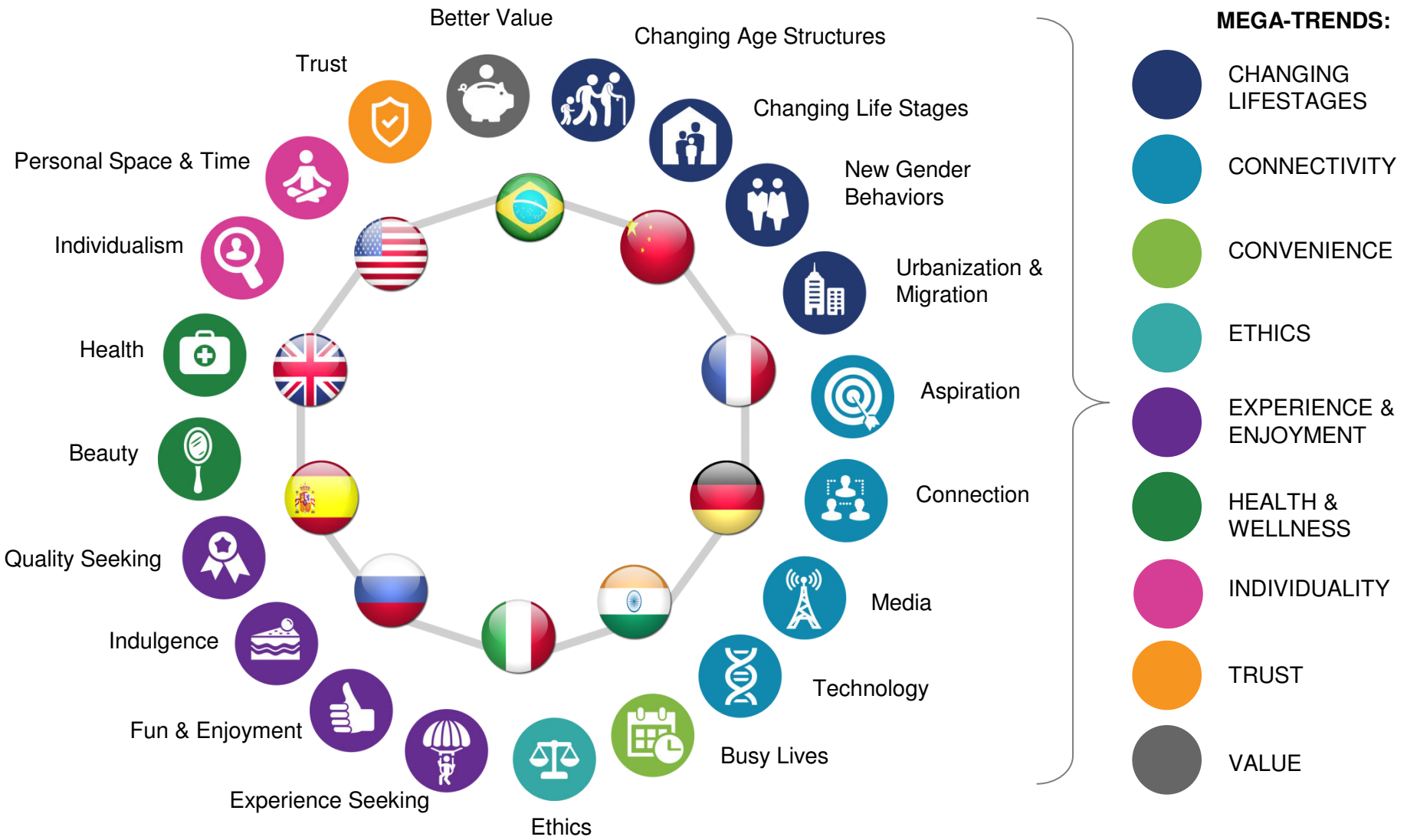
## Recommended actions

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



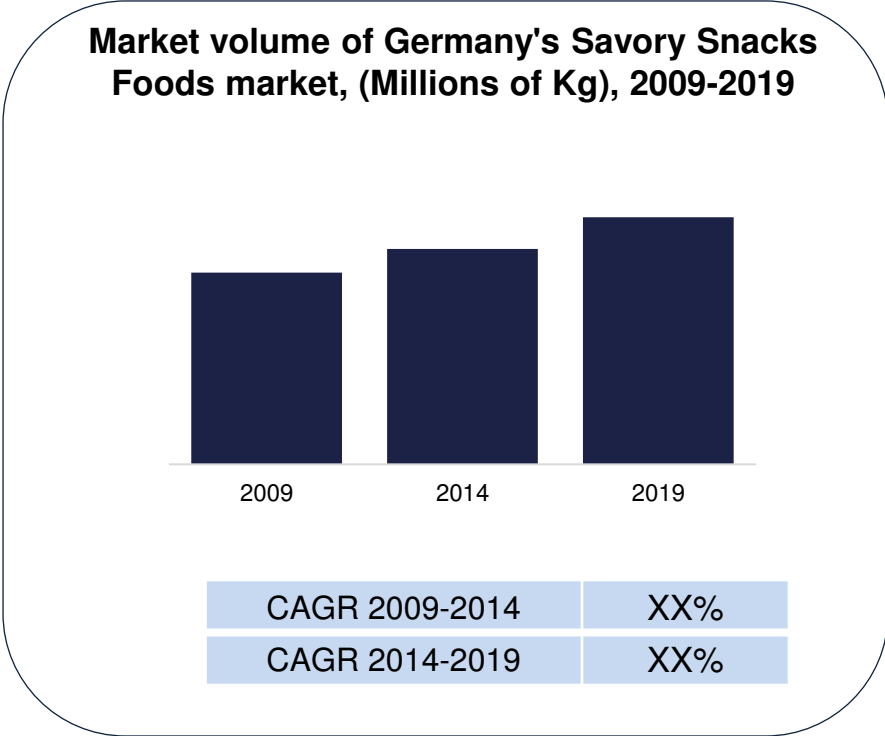


# Germany's Savory Snacks market is forecast to register moderate growth during 2014-2019

- The retail consumption in Germany's Savory Snacks market registered moderate growth in value terms during 2009–2014, at a CAGR of XX%. However, it is forecast to record a CAGR of XX% during 2014–2019
- The retail consumption in volume terms recorded a CAGR of XX% during 2009–2014, although it is expected to be marginally higher between 2014 and 2019 at a CAGR of XX%. Volume consumption is forecast to increase at a CAGR of XX% during 2014–2019 from XXX Kg million in 2014 to XXX Kg million in 2019


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

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

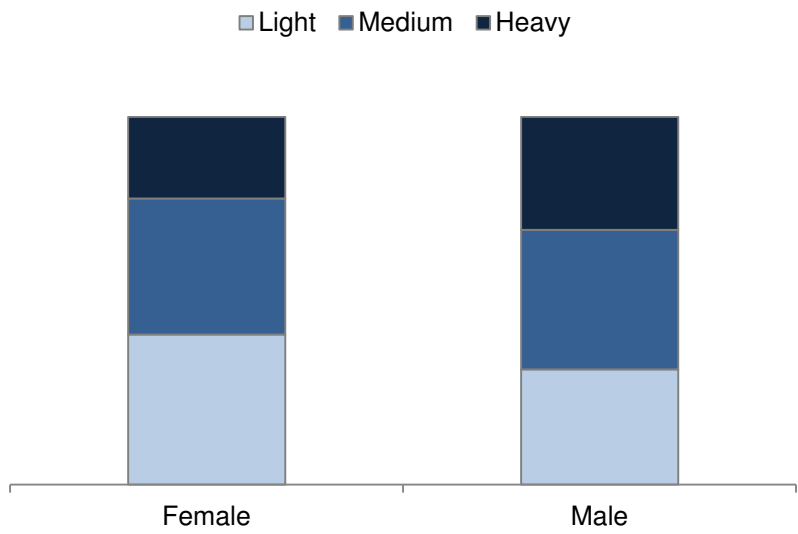


# Men consume Savory Snacks at a medium frequency whereas women consume at a light frequency

Canadean has also broken down **Savory Snacks** consumption in **Germany** 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**



Men in Germany consume Savory Snacks products at a medium frequency, whilst women are light frequency users of Savory Snacks. This implies that men have a relatively higher preference for quick and easy food alternatives such as Savory Snacks when compared to women. The higher share of medium and light consumption of Savory Snacks among men and women provides significant 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 for Potato chips, XX times for Processed Snacks, and XX times for Pretzels

# The Indulgence trend influences \$XXXX million worth of Savory Snacks consumption in Germany per annum

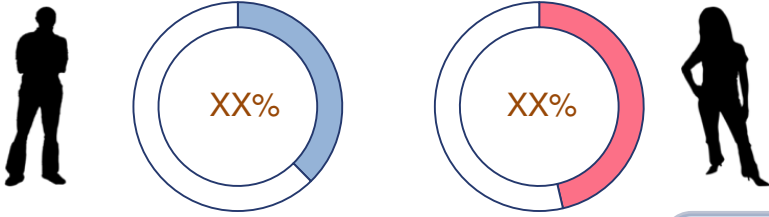
The **Indulgence** trend influences **XX Kg** million of volume sales in Germany

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

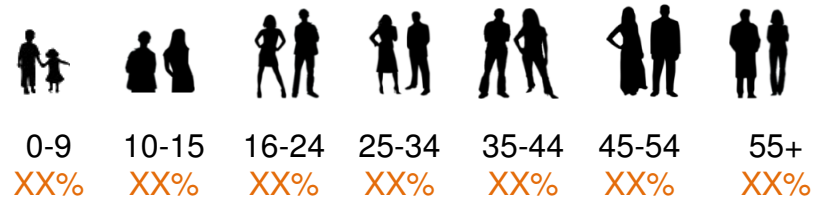
### Influence of trend by category:

- Ethnic/traditional Snacks: **XX%**
- Meat Snacks: **XX%**
- Nuts & Seeds: **XX%**
- Popcorn: **XX%**
- Potato Chips: **XX%**
- Pretzels : **XX%**
- Processed Snacks: **XX%**

#### Gender

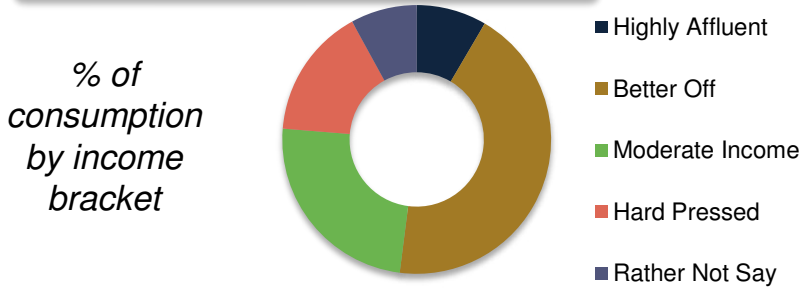


#### Age group

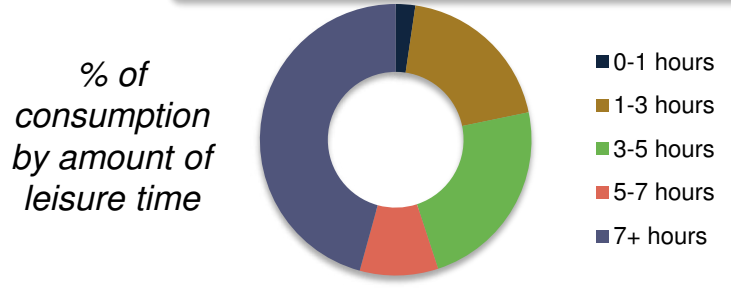


**\$XXXX US million**  
**XX Kg million**

#### Income



#### Leisure time



# Germany's Savory Snacks market is driven by the consumers' desire to treat themselves

## The need for indulgence is far more important for women

The desire for treating is a primary need in Germany's Savory Snacks market, motivating more than twice as much consumption compared to the next influential trend. The importance of the need for treating reflects how consumers seek the most indulgent textures and saturated, rich, decadent flavors. Distinctive flavors complimented with a traditional taste, and the use of natural ingredients, will appeal to consumers who are looking for indulgent offerings.

The need for treating is far more important among women, indicating how women are more likely to see Savory Snacks as a tasty treat, where health concerns are forgotten and replaced with moments of pure reward.

The desire for indulgence in Savory Snacks is a reflection of consumers wanting extra taste sensations and sensory benefits, beyond the basic taste satisfaction. This is driven by consumers' building a sense of entitlement, meaning they are unable to refrain from indulgent habits and disregard health and value concerns. This is particularly true as consumers seek out small indulgences on a daily basis as a reward for the pressures faced in everyday life and, as such, manufacturers should focus on the primary motivator of consumption in product positioning – great taste.

## Consumers seek new indulgent flavors



In October 2014, Intersnack rolled out Honey BBQ chips. The item is described as “intensely flavored” and “very crispy”, highlighting the indulgent nature of the item.

## Unusual flavors appeal to consumers and attract attention to the brand

New Strawberry & Cherry Toffee Popcorn from Yorkshire Popcorn will attract treat-seeking consumers and increase brand awareness.



# 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.



## Experience Seeking:

German consumers look for products that provide them with something novel, and demand for new and exciting tastes allows manufacturers to try experimental flavor combinations. The saturated nature of the Savory Snacks market means brands need to offer more extreme experiences; they can launch more limited and seasonal editions of products with unusual ingredients, flavors, and textures in order to gauge consumer interest in more extreme products.



## Changing Lifestages:

The life stages of modern German consumers are evolving: there are more single households, with consumers delaying having families until later in life, prioritizing professional success, and enjoying a prolonged period of kidulthood. This will lead to 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 and reduce the number of shopping trips require to stock their cupboards.



## Health:

The Health trend relates to the idea that consumers will become more aware about the physical impacts of Savory Snacks and general wellbeing, the more that they consume. They will be inclined to look for products that provide health benefits. In this regard, they will consume more Nuts & Seeds, and alternatives to Potato Chips, such as coconut chips. Therefore, the Savory Snacks industry should increasingly offer “better for you” yet tasty products, as indulgence will remain among the primary motivators.

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.