

Industry Forecast

The Future of the Food Packaging Market in Colombia to 2017

Consumption of Primary, Outer, Closure and Multi-pack Packaging



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SAMPLE PAGES

1. Introduction

1.1 What is this Report About?

This report is the result of Canadean's extensive packaging market research covering retail Food packaging in Colombia. It provides a detailed breakdown of historic and future packaging covering aspects such as pack material and type, closure material and type, primary outer packaging material and type, and multipack information.

As such, this report is aimed at companies supplying to the retail Foodindustry and for new companies considering entry into Colombia's retail Food market.

1.2 Market Categories

For this report the retail Foodmarket is segmented as follows:

Table 1: Food Markets and Categories

Market	Category
Bakery & Cereals	Baking Ingredients
	Baking Mixes
	Bread & Rolls
	Breakfast Cereals
	Cakes, Pastries & Sweet Pies
	Cereal Bars
	Cookies (Sweet Biscuits)
	Dough Products
	Energy Bars
	Morning Goods
Chilled & Deli Foods	Savory Biscuits
	Cured Meats
	Fermented Meats
	Pates
	Pies & Savory Appetizers
	Pre-Packed Sandwiches
	Prepared Salads
Confectionery	Savory Baked Goods
	Chocolate
	Gum
Dairy Food	Sugar Confectionery
	Butter & Spreadable Fats

Table 1: Food Markets and Categories

Market	Category
	Cheese
	Cream
	Eggs
	Milk
	Puddings/Desserts
	Yogurt
Dried Food	Rice
Fish & Seafood	Ambient Fish & Seafood
	Raw Packaged Fish & Seafood – Processed
	Dried Fish & Seafood
	Frozen Fish & Seafood
Fruit & Vegetables	Fruit
	Vegetables
Ice Cream	Artisanal Ice Cream
	Impulse Ice Cream
	Take-Home Ice Cream
Meat	Ambient Meat
	Raw Packaged Meat – Processed
	Raw Packaged Meat - Whole Cuts
	Cooked Meats – Packaged
	Frozen Meat
Oils & Fats	Oils
	Solid Fats
Pasta & Noodles	Ambient Noodles
	Ambient Pasta
	Chilled Noodles
	Chilled Pasta
	Dried Noodles
	Dried Pasta
Prepared Meals	Meal Kits
	Pizza
	Ready Meals
Seasonings, Dressings & Sauces	Bouillons & Stocks
	Chutneys & Relishes
	Condiment Sauces
	Dips
	Dressings

Table 1: Food Markets and Categories

Market	Category
Savory Snacks	Dry Cooking Sauces
	Herbs, Spices & Seasonings
	Wet Cooking Sauces
	Ethnic/Traditional Snacks
	Meat Snacks
	Nuts & Seeds
	Popcorn
	Potato Chips
Soups	Pretzels
	Processed Snacks
	Canned/ambient Soup
	Chilled Soup
	Dried Soup (mixes)
	Frozen Soup
Syrups & Spreads	UHT Soup
	Jams, Jellies & Preserves
	Molasses
	Savory Spreads
	Sweet Spreads
Soy Products	Syrups
	Soy Desserts
	Soy Drinks
	Soy Milk & Cream
Source: Canadean	
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1.2.1 Category Measures

Food consumption refers to domestic retail consumption only and includes imports.

All product categories are measured by weight. Where products are normally sold by volume (such as liquid milk) it has been assumed that 1ml = 1g. Weight information is collected in grams and reported in kilograms.

1.3 Packaging Categories

1.3.1 Primary Packaging Container

Table 2: Primary Packaging Container - Materials

Materials
Flexible Packaging
Glass
Paper & Board
Rigid Metal
Rigid Plastics
None
Other
Unknown
Source: Canadean

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Table 3: Primary Packaging Container - Types

Types
Aerosol
Bag - in - Box
Bag/Sachet
Blister Pack
Bottle
Box
Bubble Top
Can - Composite
Can - Drink
Can - Food
Can - Paint
Carton
Clamshell
Cup
Film
Foil
Jar
Keg/Drum
Pouch
Sleeve
Specialised Line Item
Tray
Tub
Tube
Wrapper
Other
None
Unknown

Source: Canadean

© Canadean

1.3.2 Primary Packaging Closure

Table 4: Primary Packaging Closure - Materials

Materials
Metal
Plastic
Other
None
Source: Canadean

© Canadean

Table 5: Primary Packaging Closure - Types

Types
Cap
Crown
Dispenser
Film
Flip / Snap Top
Foil
Lever Closure
Plastic Tie
Prise Off
Screw Top
Sports Cap
Stopper
Twist Off
Other
None

Source: Canadean

© Canadean

1.3.3 Primary Packaging Outer

Table 6: Primary Outer- Materials

Materials
Flexible
Paper & Board
Rigid Plastic
Other
None
Source: Canadean
© Canadean

Table 7: Primary Outer - Types

Types
Bag
Blister Pack
Box
Clamshell
Shrink Wrap
Sleeve
Other
None
Source: Canadean
© Canadean

1.3.4 Multi-Packaging

Table 8: Multi-Packaging - Materials

Material
Board
Flexible
Mixed
Plastic
Other
None
Source: Canadean
© Canadean

Table 9: Multi-Packaging - Types

Types
Bag
Blister Pack
Cluster Pack Style
Full Case
Hi-Cone Style
Board & Shrink Wrap
Shrink Wrap
Sleeve
None
Other
Source: Canadean

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1.4 Exchange Rates

US dollar conversions for all historic data and for the latest year of actual data (2012 in this report) are made using an annual average exchange rate. As we do not forecast exchange rates, the forecast data (from 2013 to 2017) is converted using a fixed 2012 exchange rate. Please note that rounding errors may occur.

Table 10: Colombia Exchange Rate Colombian Peso –US\$(Annual Average), 2007–2012

Sector	2007	2008	2009	2010	2011	2012
Colombian Peso-US\$ Exchange Rate (Annual Average)	0.00048	0.00051	0.00046	0.00053	0.00054	0.00056

Source: World Bank, Timetric and Canadean© Canadean

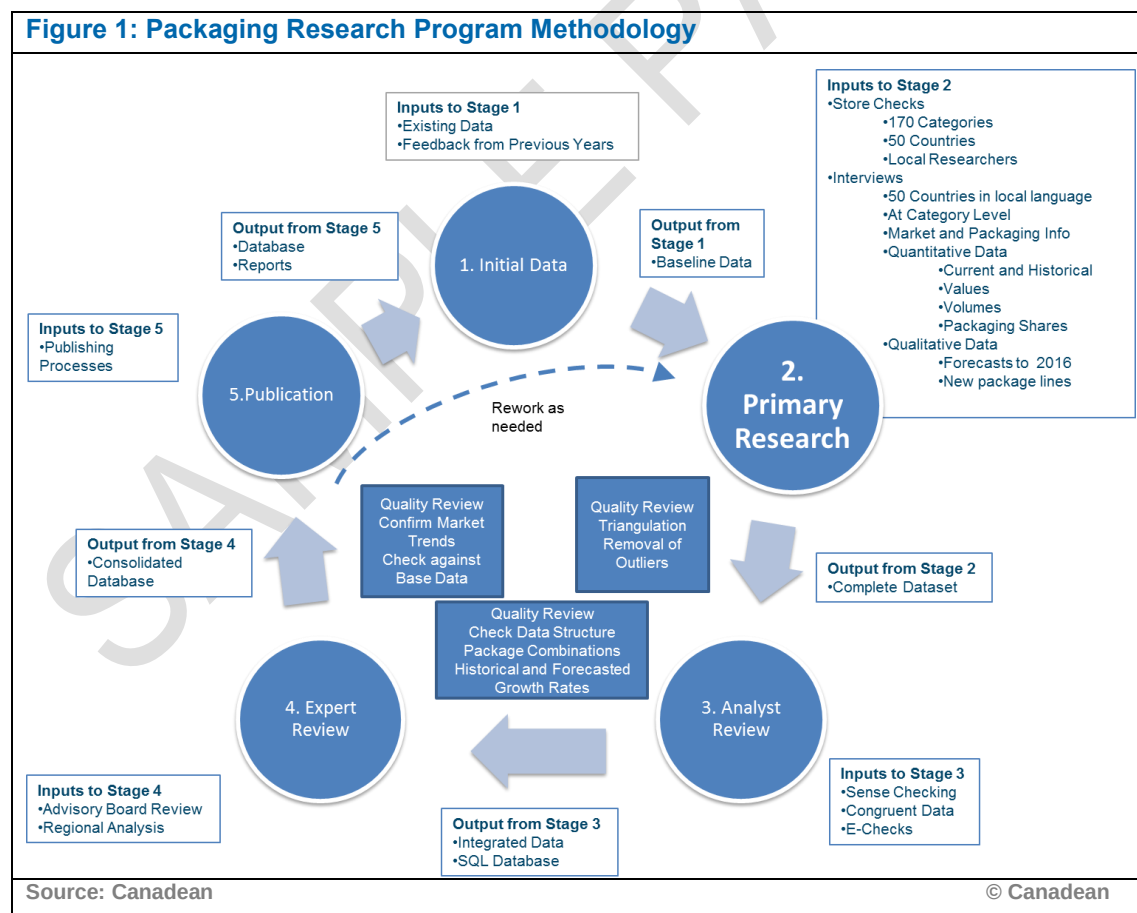
2. Methodology

2.1 Introduction

This report is based upon our extensive packaging consumption data research program. This research is far reaching, in terms of the range of products covered as well as the number of countries researched, and detailed in terms of the number of products covered and the level of packaging detail at the product category level. The program covers 170 different product categories over 8 markets and 50 countries over 5 continents, and provides detailed information on material, type for primary container, closure, outer, and multi-packaging in all these areas. For container, closure, and outer the data includes both historical and forecast figures.

2.1.1 Overall Research Program Framework

Our packaging research program uses an optimal mix of methods and approaches, in particular extensive primary research, in order to deliver highly granular data. There are four research phases, plus publication, enabling a synthesis of packaging consumption and market data from a variety of industry sources.



2.2 Stage 1 - Initial Market Sizing of the Packaging Market

The initial stage of research involves collecting information from multiple sources (including other in-house research programs) in order to obtain baseline data for the value and volume of the packaged consumer goods market as well as packaging formats and shares. This provides both historical and forecast data.

Our sources include:

- Our existing databases
 - Canadean's robust and established consumer packaged goods information, which is itself based on extensive industry interviewing
 - Exhaustive market research using online surveys into consumer behavior across 10 core countries, which provides both consumption data and consumer insights
 - From year 2 onwards, feedback from previous years' reports
- Online desk research
 - End use market sizing information from trade data, company data, industry sites and portals
 - Production, Imports, Exports, Sales information from Trade Associations, Manufacturers, Government Bodies

Following this research and consolidation of findings we produce a set of baseline data, which feeds forward to the next stage.

2.3 Stage 2 – Primary Research on Packaging Consumption

Primary Research consists of detailed and extensive Store Checks and Industry Interviews.

Store Checks are conducted by local researchers in all 50 countries covered by the program to collect current year data for primary packaging material and type, closure material and type, outer material and type, and multi-packaging material and type, with shares, across all 170 categories. A strict data format is used to collect information in a consistent manner over both geography and time. Researchers are also encouraged to comment on any formats that do not fit the prescribed definitions or any changes they notice in packaging.

Extensive interviews, carried out in local language as required, are carried out for all 50 countries and to cover all 170 categories. We speak to a variety of experts in both national and international companies including –

- Leading Executives in packaging at both the global level and local level
- Marketing Managers with specific knowledge about packaging from the major manufacturers in local product category leaders

Using a standardized, structured questionnaire with a facility to note ad-hoc comments, we collect

- Quantitative data
 - Current and historical market size by volume and value
 - Current and historical packaging formats and shares
- Qualitative data
 - Key market volume and value trends, and forecasts
 - Possible future packaging formats

2.4 Stage 3 - Analyst Review

All inputs from the initial two research stages are systematically reviewed. Any information that does not appear to be robust is checked against original sources - original data sets, interview transcripts or original documentation. At this stage we may also ask for a store check or interview to be re-done, and we also use the facility of online shopping to double check for any unusual packaging combinations. Analysts review all data and consolidate into a final data set for further review.

This stage of the process results in a final congruent dataset of information per country, showing all the inputs for each of the 170 categories along with the proposed outputs, including historical and forecast shares. The final dataset is a result of building information from the detailed level of packs on a shelf to an overall industry view.

2.5 Stage 4 - Expert Review

At this stage the data is imported into a bespoke SQL database to provide enhanced data review, improved data management, and allowing publication via interactive databases so that it can be assessed against industry benchmarks and a Senior Management Review board. The Review Board then provides feedback and any suggestions for improvement. The data is then amended in line with these suggestions, re-imported in to the SQL database and re-exported to the data cube for review and feedback, again by Senior Management. This loop is repeated as often as is necessary to produce consistent and accurate data.

2.6 Stage 5 - Publication

Once we have consistent and accurate data, the data cubes are published to our online interactive portal, the Packaging Intelligence Center, to enable interrogation by subscribers. We also produce reports by Country and Market containing a data book style of top-line data. These reports are also uploaded to the Packaging Intelligence Center as well as being forwarded to various Distributors and Sales teams.

3. Overview

3.1 Food Market Trends and Issues

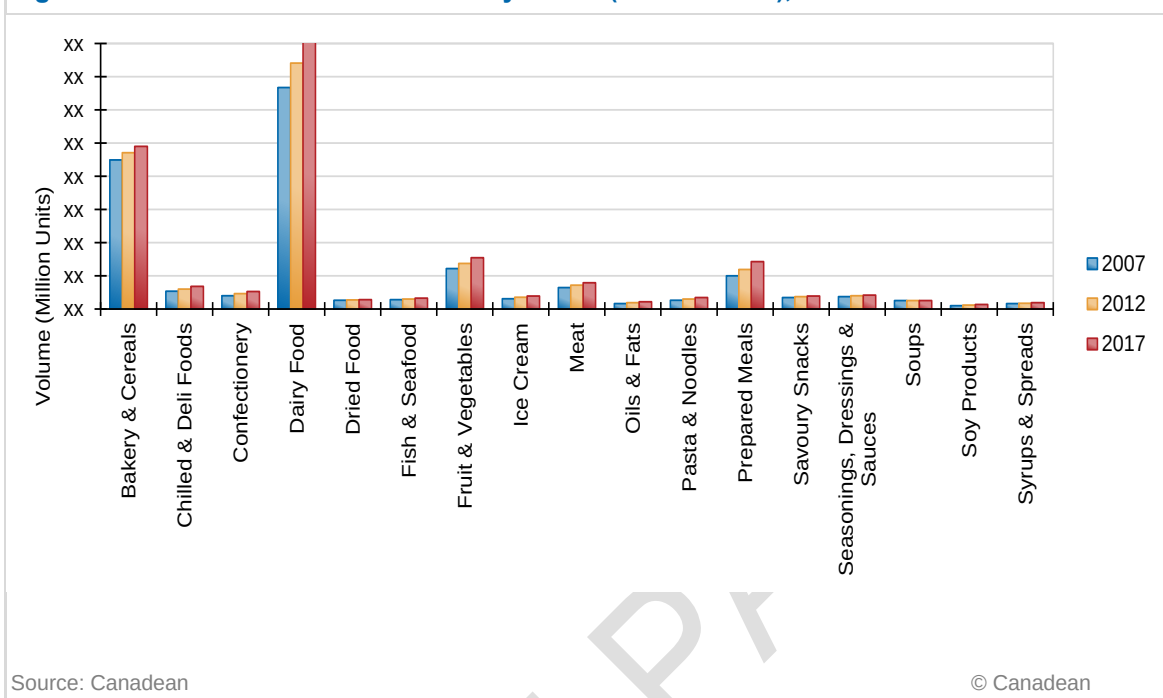
3.1.1 Food Market Overview by Number of Packs

Table 11: Colombia Food Market Size by Packs (Million Units), 2007 – 2017

Category	2007	2012	2017	CAGR 2007 – 2012	CAGR 2012 – 2017
Bakery & Cereals					
Chilled & Deli Foods					
Confectionery					
Dairy Food					
Dried Food					
Fish & Seafood					
Fruit & Vegetables					
Ice Cream					
Meat					
Oils & Fats					
Pasta & Noodles					
Prepared Meals					
Savoury Snacks					
Seasonings, Dressings & Sauces					
Soups					
Soy Products					
Syrups & Spreads					
Overall					

Source: Canadean

© Canadean

Figure 6: Colombia Food Market Size by Packs (Million Units), 2007 – 2017


3.2 Food Packaging Trends and Issues

3.2.1 Food Packaging Overview

Food Container Material by Volume of Packaged Goods

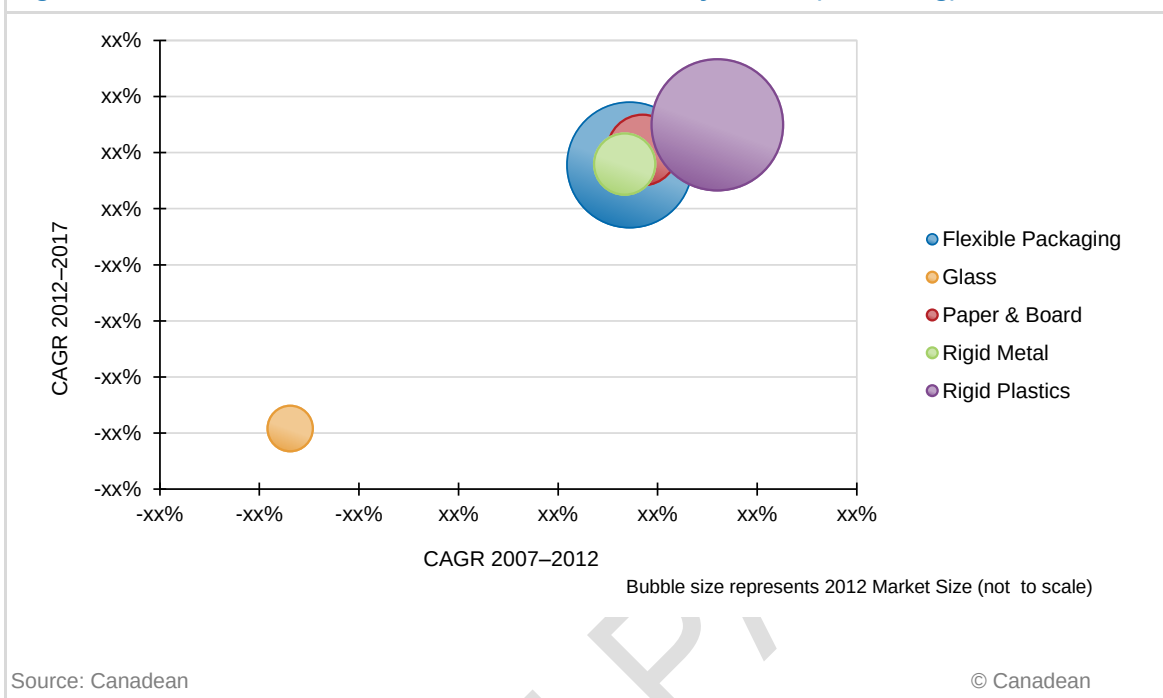
Table 13: Colombia Food Container Material by Volume of Packaged Goods (Million Kg), 2007 – 2017

Material	2007	2012	2017	CAGR 2007 – 2012	CAGR 2012 – 2017
Flexible Packaging					
Glass					
Paper & Board					
Rigid Metal					
Rigid Plastics					
Overall					

Source: Canadean

© Canadean

Figure 11: Colombia Food Container Material Market Dynamics (Million Kg), 2007 – 2017



4. Food Packaging by Market

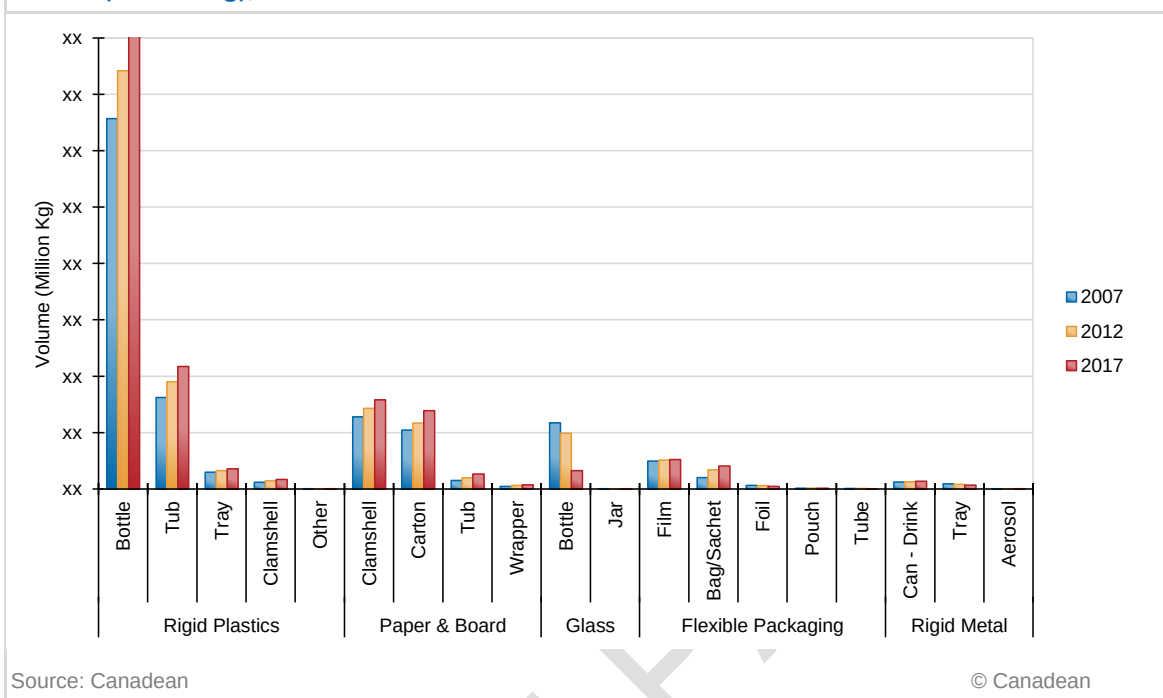
4.1 Dairy Food Packaging by Market

4.1.1 Dairy Food Container Material and Type by Volume of Packaged Goods

Table 39: Colombia Dairy Food Container Material and Type by Volume of Packaged Goods (Million Kg), 2007 – 2017

Material	Type	2007	2012	2017	CAGR 2007 – 2012	CAGR 2012 – 2017
Rigid Plastics	Bottle					
	Tub					
	Tray					
	Clamshell					
	Other					
Paper & Board	Clamshell					
	Carton					
	Tub					
	Wrapper					
Glass	Bottle					
	Jar					
Flexible Packaging	Film					
	Bag/Sachet					
	Foil					
	Pouch					
	Tube					
Rigid Metal	Can - Drink					
	Tray					
	Aerosol					
Overall						
Source: Canadean					© Canadean	

Figure 54: Colombia Dairy Food Container Material and Type by Volume of Packaged Goods (Million Kg), 2007 – 2017



4.2 Prepared Meals Packaging by Market

4.2.1 Prepared Meals Closure Material and Type by Volume of Packaged Goods

Table 97: Colombia Prepared Meals Closure Material and Type by Volume of Packaged Goods (Million Kg), 2007 – 2017

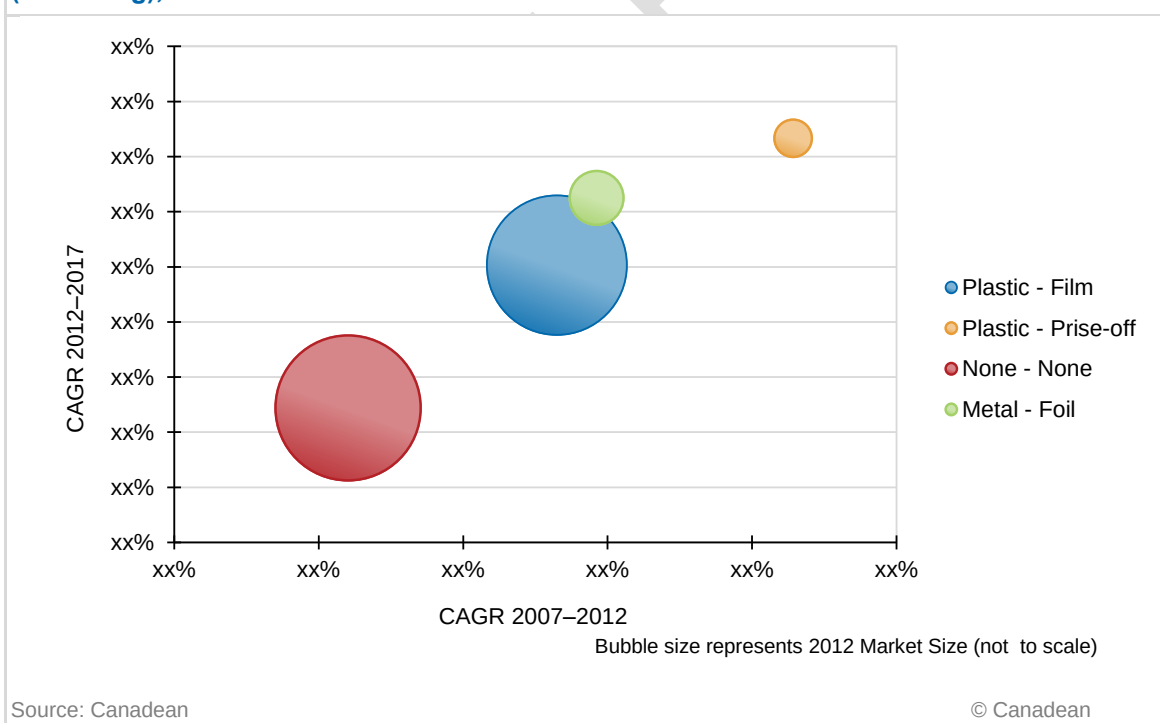
Material	Type	2007	2012	2017	CAGR 2007 – 2012	CAGR 2012 – 2017
Plastic	Film					
	Prise off					
None	None					
Metal	Foil					

Overall

Source: Canadean

© Canadean

Figure 147: Colombia Prepared Meals Closure Material and Type, Volume Market Dynamics (Million Kg), 2007 – 2017



4.3 Seasonings, Dressings & Sauces Packaging by Market

4.3.1 Seasonings, Dressings & Sauces Outer Material and Type by Volume of Packaged Goods

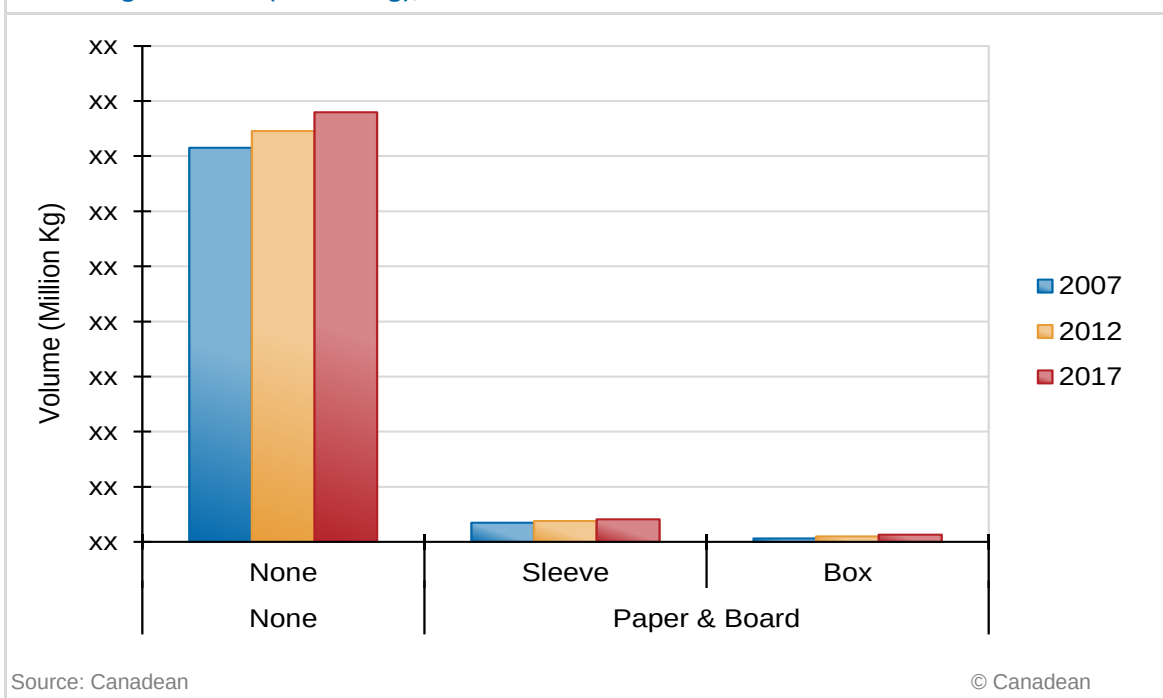
Table 113: Colombia Seasonings, Dressings & Sauces Outer Material and Type by Volume of Packaged Goods (Million Kg), 2007 – 2017

Material	Type	2007	2012	2017	CAGR 2007 – 2012	CAGR 2012 – 2017
None	None					
Paper & Board	Sleeve					
	Box					
Overall						

Source: Canadean

© Canadean

Figure 174: Colombia Seasonings, Dressings & Sauces Outer Material and Type by Volume of Packaged Goods (Million Kg), 2007 – 2017



5. Appendices

5.1 About Canadean

Canadean is a full-service business information provider with in-house market research capabilities. We specialize in analysis across the Consumer Markets Value Chain, covering suppliers, producers, distribution, and consumers.

Canadean's dedicated research and analysis teams consist of experienced professionals with an industry background in marketing, market research, consulting, and advanced statistical expertise. We offer value-added market research, insight, and strategic analysis and our products help companies to make better, more informed, strategic and tactical sales, and marketing decisions.

Canadean's areas of expertise include online research, qualitative and quantitative research, industry analysis, custom approaches, and actionable insights. In addition, Canadean has built a network of consultants and specialist researchers across more than 60 countries, each with in-depth industry experience and expertise enabling us to conduct unique and insightful research via our trusted business communities.

5.2 Disclaimer

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