The Future of the Pasta & Noodles Market in Hong Kong to 2017
Market Size, Distribution and Brand Share, Key Events and Competitive Landscape

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1. Introduction

1.1 What is this Report About?

This report is the result of Canadean’s extensive market research covering the Pasta & Noodles Market in Hong Kong. It provides detailed segmentation of historic and future Pasta & Noodles Market, covering key categories and segments.

As such the report is an essential tool for companies active across the Pasta & Noodles industry and for new players considering entry into Hong Kong’s Pasta & Noodles market.

1.2 Definitions

All the data is collected in volume terms. Pasta & Noodles Market refers to domestic Market only and includes imports. Please note that rounding errors may occur.

1.2.1 This report provides 2012 actual sales; while forecasts are provided for 2013 – 2017

1.2.2 Category Definitions

<table>
<thead>
<tr>
<th>Category</th>
<th>Segment</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ambient Noodles</td>
<td></td>
<td>Ambient Noodles - these are &quot;shelf-stable&quot; packs of noodles which are bagged but do not require chilled/refrigerated storage. NB: this includes &quot;straight to wok&quot; style noodles. Noodles which require chilled/refrigerated storage are not included (please see Chilled Noodles definition). Excludes dried noodles.</td>
</tr>
<tr>
<td>Ambient Pasta</td>
<td></td>
<td>Ambient Pasta - These are shelf stable packs of (non-dried) pasta which do not require chilling or refrigeration. These are very rare in most countries.</td>
</tr>
<tr>
<td>Chilled Noodles</td>
<td></td>
<td>Chilled Noodles - these are &quot;fresh&quot; noodles (in a similar way to fresh pasta) which are bagged and require chilled/refrigerated storage. Relatively rare in Western countries. NB: Packs of non-dried noodles (often called &quot;straight to wok&quot; noodles or similar) are NOT chilled noodles (see ambient noodles definition).</td>
</tr>
<tr>
<td>Chilled Pasta</td>
<td></td>
<td>Chilled Pasta - &quot;fresh&quot; pasta (made from a combination of wheat flour, water and often eggs) which is bagged and stored in chilled shelves/cabinets in retailers</td>
</tr>
<tr>
<td>Dried &amp; Instant Noodles</td>
<td></td>
<td>Dried Noodles - All noodles, flavoured or unflavoured, which are not only dried, but are designed to be cooked and combined with other ingredients to form a meal (i.e. packets of dried noodles). EXCLUDES Pot Noodle type products.</td>
</tr>
<tr>
<td>Dried Pasta</td>
<td></td>
<td>Dried Pasta - All varieties of dried pasta designed to be boiled with water. Typically with a long shelf-life e.g. Buitoni Eliche, Barilla’s Mini Fusilli. Does not include instant noodles.</td>
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</tbody>
</table>

Source: Canadean © Canadean
1.2.3 Distribution Channel Definitions

<table>
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<tr>
<th>Distribution Channel</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash &amp; carries &amp; warehouse clubs</td>
<td>Cash &amp; carries sell from a wholesale warehouse to customers (small retailers, professional users) who pay on the spot and transport goods away themselves. Warehouse clubs are no-frills stores that sell discounted goods to members who pay an annual fee. Delivered wholesale sales are not included. In our data only sales from these stores direct to the public (for example through work place deals allowing otherwise regular consumers to shop there) are covered. Example: Makro, Metro, Costco, Sams Club</td>
</tr>
<tr>
<td>Discount, variety store &amp; general merchandise retailers</td>
<td>Dollar Stores, Variety Stores &amp; General Merchandise Retailers - A variety store or price-point retailer (including Dollar stores) is a retail store that sells inexpensive items, often with a single price for all items in the store, or a general low price policy. Typical merchandise includes cleaning supplies, toys, household goods and gardening equipment, basic foods and beverages. A general store, general merchandise store, or small town store carries a (broad) general line of merchandise, often in a medium (and sometimes small) store format, serving the needs of either the surrounding town or rural area. They differ from convenience stores or corner shops in that it will be the main shop for the community rather than a convenient supplement and typically carries a broader product line. Example: 9 to 9 Dollar Shop.</td>
</tr>
<tr>
<td>Convenience stores &amp; gas stations</td>
<td>Convenience Stores - Includes all sales through stores of an area generally less than 300 sq m, that specialize in a limited range of food &amp; grocery products designed primarily for consumers with top-up shopping needs. Also includes sales in retail outlets attached to gas stations, where fuel is the main revenue driver, kiosks, and newstands. This also includes small independent retailers, particularly those present in countries such as China and India.</td>
</tr>
<tr>
<td>Department stores</td>
<td>Department Stores - Includes all sales through multi-category retailers, focusing primarily on non-grocery categories with distinct departments specializing in defined product areas. Examples include Bloomingdale’s, Macy’s, John Lewis and El Corte Ingles.</td>
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<tr>
<td>Hypermarkets &amp; supermarkets</td>
<td>Hypermarkets &amp; Supermarkets (incl. discounters) - Hypermarkets/mass merchandisers include all sales through retailers with floor area over 2,500 sq m that carry full lines of both grocery and general merchandise (e.g. Walmart). Supermarkets include all sales through retailers with a floor area of 300 sq m -2,500 sq m that offer a wide, departmentalized range of groceries, and may carry some general merchandise lines (e.g. Sainsbury’s, Kroger). It also includes hard grocery discounters such as Walmart.</td>
</tr>
<tr>
<td>Vending machines</td>
<td>Vending machines - Includes paid-for sales from all vending machines not located within a store (e.g. public places, workplaces, pubs &amp; Bars).</td>
</tr>
<tr>
<td>Drug stores &amp; Pharmacies</td>
<td>Drug stores &amp; Pharmacies - Stores licensed to dispense prescription (Rx) and over-the-counter (OTC) healthcare products and where these sales account for the majority of revenues. Also known as Drug store and Health store. This channel does not include supermarkets with pharmacy counters. Example: Hetro and Apollo pharmacies in India.</td>
</tr>
<tr>
<td>Food &amp; drinks specialists</td>
<td>Food &amp; drinks specialists - Includes bakers, butchers, delicatessens, drinks specialists, fishmongers, greengrocers, Food &amp; drinks only stores, and single category stores (e.g. stores selling only cheese, or only olives, or only honey, or only Confectionery products) Example: Amul Dairy shops In India.</td>
</tr>
<tr>
<td>eRetailers</td>
<td>eRetailers - Includes all sales that take place over the internet, irrespective of whether the vendor is a pure-play internet company or the online offering of a physical retailer. Example: Amazon, SPAR and FutureBazaar.com in India.</td>
</tr>
<tr>
<td>Health &amp; Beauty Stores</td>
<td>Retailers that generate the majority of their revenue through a specific product type. In the personal care market, this includes specialist stores other than drugstores. Example: Boots in United Kingdom, Himalaya In India.</td>
</tr>
<tr>
<td>Other general retailers</td>
<td>Others - Includes other generalist retail channels not included in the categories above (e.g. market traders, charity stores, student union stores, direct sales, and Duty Free shops).</td>
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Source: Canadean
1.2.4 Volume Units and Aggregations

<table>
<thead>
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<th>Category</th>
<th>Segment</th>
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<tr>
<td>Pasta &amp; Noodles</td>
<td>Ambient Noodles</td>
<td>Kg m</td>
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<td></td>
<td>Ambient Pasta</td>
<td>Kg m</td>
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<td>Chilled Noodles</td>
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<td></td>
<td>Chilled Pasta</td>
<td>Kg m</td>
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<td></td>
<td>Dried &amp; Instant Noodles</td>
<td>Kg m</td>
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<tr>
<td></td>
<td>Dried Pasta</td>
<td>Kg m</td>
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</tbody>
</table>

Source: Canadean

1.2.5 CAGR Definition and Calculation

Compound Annual Growth Rate (CAGR) is the year-over-year growth rate of a value over a specified period of time.

For this report, CAGR for historic time period is Calculated from 2007-2012, as

\[ CAGR = ((\frac{2012\ Value\ }{2007\ Value})^{\frac{1}{(2012-2007)}}) - 1 \]

CAGR for forecast time period is Calculated from 2012-2017, as

\[ CAGR = ((\frac{2017\ Value\ }{2012\ Value})^{\frac{1}{(2017-2012)}}) - 1 \]

For Brand Analysis and Distribution Channel Analysis, CAGR is Calculated from 2009-2012, as

\[ CAGR = ((\frac{2012\ Value\ }{2009\ Value})^{\frac{1}{(2012-2009)}}) - 1 \]
1.2.6 Graphical representation of Brands
Top 10 brands are considered for each category in the market subject to availability of such data. Brand analysis charts are displayed only for categories where data is available for more than two brands.

1.2.7 Exchange Rates
All research is conducted in local currency in nominal prices. 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. For details please refer to table below. As we do not forecast exchange rates, the forecast data (from 2013 to 2017) is converted using a fixed 2012 exchange rate. As a result, annual growth rates for historic data will differ between local currencies and US dollar conversions, whereas they will be the same for forecasts.

<table>
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<tr>
<th>Currency</th>
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<td>LCU – USD</td>
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Source: Canadean

1.2.8 Methodology Summary
In order to create the data for all the reports in this series and ensure its robustness, a comprehensive and empirically robust research methodology has been adopted. This combines both a large-scale program of industry research with the results of extensive primary industry interviewing and calling. Furthermore, all definitions are standardized across products and countries to ensure comparability.

The two main research methods, secondary research and primary research (the program of interviewing industry contacts), are brought together and because both sets of research processes have been designed in conjunction with each other they can be combined and consolidated into the final, integrated data sets.

The secondary research process involves covering publicly available sources, trade associations, specialist databases, company annual reports, and industry publications. While primary research involves a major program of interviewing leading industry executives for each category covered in each country – all with local country experts; typically brand, product and marketing managers for major brands within each country. These processes help analysts in capturing both qualitative and quantitative information about the market.

The final stage of the process is the triangulation of inputs obtained from all the research methods with the analyst’s own understanding of the market in order to finalize the data. Once the data is finalized, it goes through various top level quality checks prior to publishing.
2. Hong Kong Pasta & Noodles Market Analysis, 2007–17

2.1 Pasta & Noodles Value Analysis, 2007–17

2.1.1 Overall Pasta & Noodles Market Value, 2007–17

Table 5: Hong Kong Pasta & Noodles Market Value (LCU m) and Growth (Y-o-Y), 2007–17

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Source: Canadean

Table 6: Hong Kong Pasta & Noodles Market Value (USD m) and Growth (Y-o-Y), 2007–17

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Source: Canadean

Figure 1: Hong Kong Pasta & Noodles Market Value (LCU m) and Growth (Y-o-Y), 2007–17

Source: Canadean
### 2.1.2 Pasta & Noodles Market Value by Category, 2007–17

#### Table 7: Hong Kong Pasta & Noodles Market Value (LCU m) by Category, 2007–12

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Source: Canadean

#### Table 8: Hong Kong Pasta & Noodles Market Value (LCU m) by Category, 2012–17

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Source: Canadean
**Table 9: Hong Kong Pasta & Noodles Market Value (USD m) by Category, 2007–12**

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Source: Canadean

© Canadean

**Table 10: Hong Kong Pasta & Noodles Market Value (USD m) by Category, 2012–17**

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Source: Canadean

© Canadean
Figure 2: Hong Kong Pasta & Noodles Market Value (LCU m) by Category, 2007–17

Source: Canadean
### 2.1.3 Market Growth Dynamics by Value – Pasta & Noodles, 2007–17


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Source: Canadean

© Canadean

**Figure 3: Hong Kong Pasta & Noodles Market Dynamics, by Category, by Market Value, 2007–17**

Source: Canadean

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