

The Future of the Confectionery Market in Saudi Arabia 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 Confectionery Market in Saudi Arabia. It provides detailed segmentation of historic and future Confectionery Market, covering key categories and segments.

As such the report is an essential tool for companies active across the Confectionery industry and for new players considering entry into Saudi Arabia's Confectionery market.

1.2 Definitions

All the data is collected in volume terms. Confectionery 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 1: Category Definitions - Confectionery Market

Category	Segment	Definition
Chocolate	Boxed Chocolate	Assortments of individual and different bite-sized chocolates packaged in a box or carton. These are generally used as gifts. For Example: Cadbury's Milk Tray; Cadbury's Roses ; Lindt Swiss Luxury Selection Gift Boxes; Lindt Selection
	Chocolate Countlines	Chocolate-covered bars generally eaten in one go. Includes bite size countlines sold in multipacks. For Example: Kit Kat, Twix
	Chocolate Straightlines	Chocolate straightlines (also called selflines) are small identical products tend to be eaten as informal or casual snacks, often on the move. For Example: a bag of Cadbury's Chocolate Buttons; and Cadbury's Twirl Bites.
	Molded Bars	Molded Bars are solid chocolate bars, blocks or tablets produced by pouring melted chocolate into molds, with or without added ingredients such as fruit and/or nuts. For Example: Cadbury's Dairy Milk Fruit and Nut, Hershey's Cookies N Crème bar
	Novelties	These are seasonal products produced during Easter, Valentine's Day and Christmas, which include products such as chocolate eggs, soldiers, animals and coins. For Example: Cadbury's Dairymilk Milk Chocolate Coins.
	Other Chocolate	All other chocolate including local specialties such as Alfajores in some parts of Latin America.

Table 1: Category Definitions - Confectionery Market

Category	Segment	Definition
Gum	Bubble Gum	A chewing gum especially designed for blowing bubbles e.g. Hubba Bubba.
	Chewing Gum	Sweetened and flavoured gum prepared for chewing. Includes regular, sugar-free and functional varieties of chewing gums; does not include bubble gum e.g. Wrigley's Spearmint, Dentyne Ice Sugarless Gum, Air-Lift Dental Chewing Gum, Wrigley's Extra, Trident White Gum, and Orbit.
Sugar Confectionery	Caramels & Toffees	Toffee is a confection made by caramelizing sugar or treacle, molasses (creating inverted sugar) along with butter, milk and occasionally flour. Caramel is a beige to dark-brown confectionery product made by boiling milk and sugar together. E.g. Chocolate eclairs.
	Gums & Jellies	Flavored and colored sugary products formed into a jelly-like structure. Includes gum drops, jelly beans, jellied and fruit-flavoured slices. E.g. Fruit Pastilles, Jelly Belly beans.
	Hard Boiled Sweets	Sugar mass which is processed to be non-grained or to be grained through aeration. Includes sugar-free varieties e.g. Fox's Glacier Fruits, Pear Drops. Also known as bonbons in France.
	Medicated Confectionery	Cough drops, lozenges and all other sugar confectionery products that make health claims e.g. Halls. Includes products with and without licensed OTC pharmaceutical status. Does not include laxative chocolates.
	Mints	Sugar confectionery flavoured with natural or synthetic mint oil e.g. Polo, Murray Mints. Does not include mint-flavoured chocolates.
	Other Sugar Confectionery	Other sugar-based confectionery products other than chocolate, chewing gums and cereal bars. Includes marshmallows and fudges.
Source: Canadean		© Canadean

1.2.3 Distribution Channel Definitions

Table 2: Distribution Channel Definitions - Confectionery Market

Distribution Channel	Definition
Cash & carries & warehouse clubs (Cash & Carry)	Cash & 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
Discount, variety store & general merchandise retailers (Dollar Stores)	Dollar Stores, Variety Stores & 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.

Table 2: Distribution Channel Definitions - Confectionery Market

Distribution Channel	Definition
Convenience stores & gas stations (Convenience stores)	Convenience Stores - Includes all sales through stores of an area generally less than 300 sq m, that specialize in a limited range of food & 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 newsstands. This also includes small independent retailers, particularly those present in countries such as China and India.
Department stores (Department stores)	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.
Hypermarkets & supermarkets (Hyper/ Super Markets)	Hypermarkets& 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.
Vending machines (Vending machines)	Vending machines - Includes paid-for sales from all vending machines not located within a store (e.g. public places, workplaces, pubs & Bars).
Drug stores & Pharmacies (Pharmacies)	Drug stores & 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.
Food & drinks specialists (Food & drinks specialists)	Food & drinks specialists - Includes bakers, butchers, delicatessens, drinks specialists, fishmongers, greengrocers, Food & 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.
eRetailers (eRetailers)	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.
Health & Beauty Stores	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 UK, Himalaya In India.
Other general retailers (Others)	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).
Source: Canadean	
© Canadean	

1.2.4 Volume Units and Aggregations

Table 3: Volume Units for Confectionery Market

Market	Category	Units
Confectionery	Chocolate	Kg m
	Gum	Kg m
	Sugar Confectionery	Kg m
Source: Canadean		© 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

$$\text{CAGR} = ((2012 \text{ Value} / 2007 \text{ Value})^{1 / (2012-2007)}) - 1$$

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

$$\text{CAGR} = ((2017 \text{ Value} / 2012 \text{ Value})^{1 / (2017-2012)}) - 1$$

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

$$\text{CAGR} = ((2012 \text{ Value} / 2009 \text{ Value})^{1 / (2012-2009)}) - 1$$

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 4: Saudi Arabia Exchange Rate LCU (Local Currency Unit) – USD (Annual Average), 2007 – 2012

Currency	2007	2008	2009	2010	2011	2012
LCU – USD	xxxx	xxxxx	xxxx	xxxx	xxxx	xxxx
Source: Canadean						© 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. Saudi Arabia Confectionery Market Analysis, 2007–17

2.1 Confectionery Value Analysis, 2007–17

2.1.1 Overall Confectionery Market Value, 2007–17

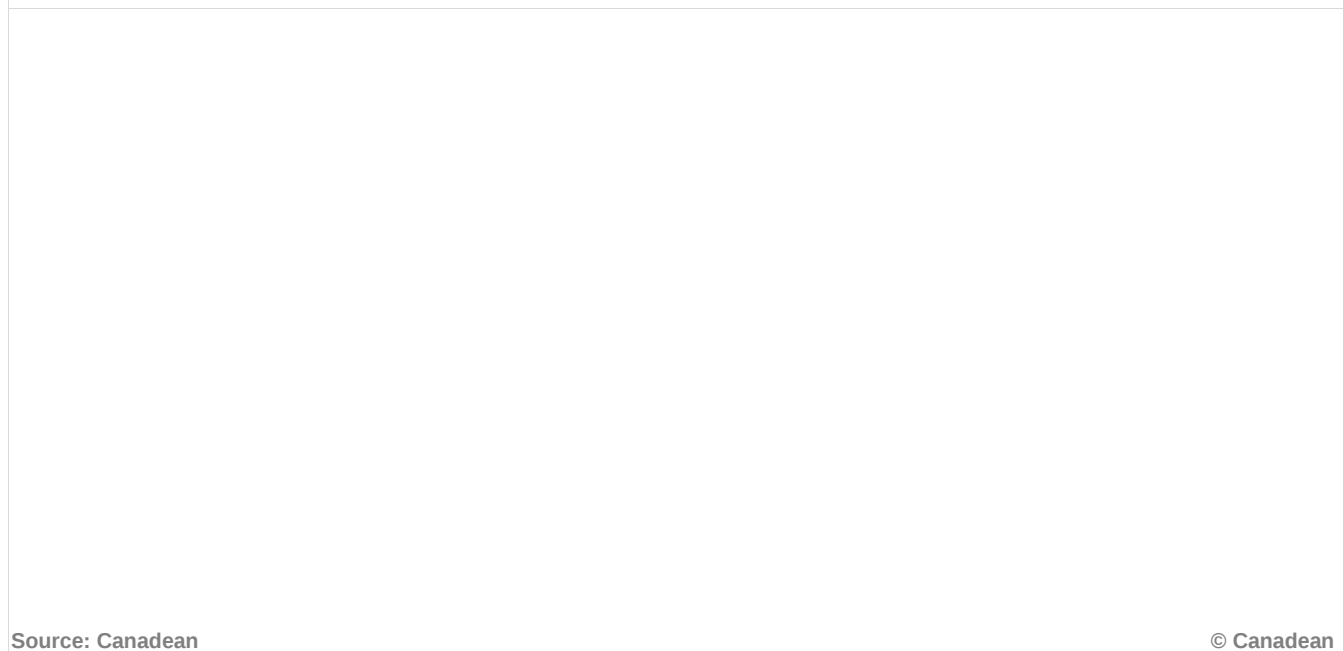
Table 5: Saudi Arabia Confectionery Market Value (LCU m) and Growth (Y-o-Y), 2007–17

Category	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Market Value											
Y-o-Y growth											
Source: Canadean											© Canadean

Table 6: Saudi Arabia Confectionery Market Value (USD m) and Growth (Y-o-Y), 2007–17

Category	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Market Value											
Y-o-Y growth											
Source: Canadean	© Canadean										

Figure 1: Saudi Arabia Confectionery Market Value (LCU m) and Growth (Y-o-Y), 2007–17



2.1.2 Confectionery Market Value by Category, 2007–17

Table 7: Saudi Arabia Confectionery Market Value (LCU m) by Category, 2007–12

Category	2007	2008	2009	2010	2011	2012	CAGR 2007–12
Chocolate							
Gum							
Sugar Confectionery							
Overall							
Source: Canadean							© Canadean

Table 8: Saudi Arabia Confectionery Market Value (LCU m) by Category, 2012–17

Category	2012	2013	2014	2015	2016	2017	CAGR 2012–17
Chocolate							
Gum							
Sugar Confectionery							
Overall							
Source: Canadean							© Canadean

Table 9: Saudi Arabia Confectionery Market Value (USD m) by Category, 2007–12

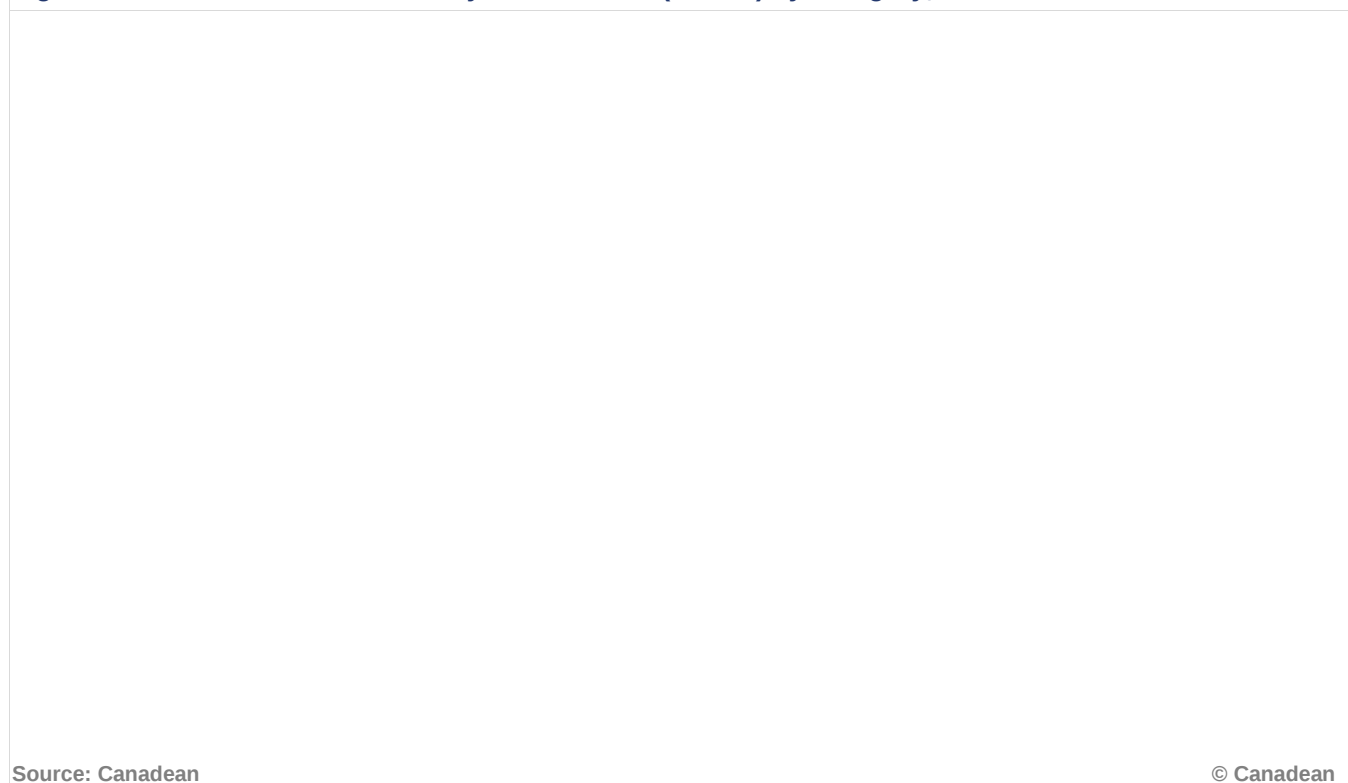
Category	2007	2008	2009	2010	2011	2012	CAGR 2007–12
Chocolate							
Gum							
Sugar Confectionery							
Overall							
Source: Canadean							© Canadean

Table 10: Saudi Arabia Confectionery Market Value (USD m) by Category, 2012–17

Category	2012	2013	2014	2015	2016	2017	CAGR 2012–17
Chocolate							
Gum							
Sugar Confectionery							
Overall							

Source: Canadean

© Canadean

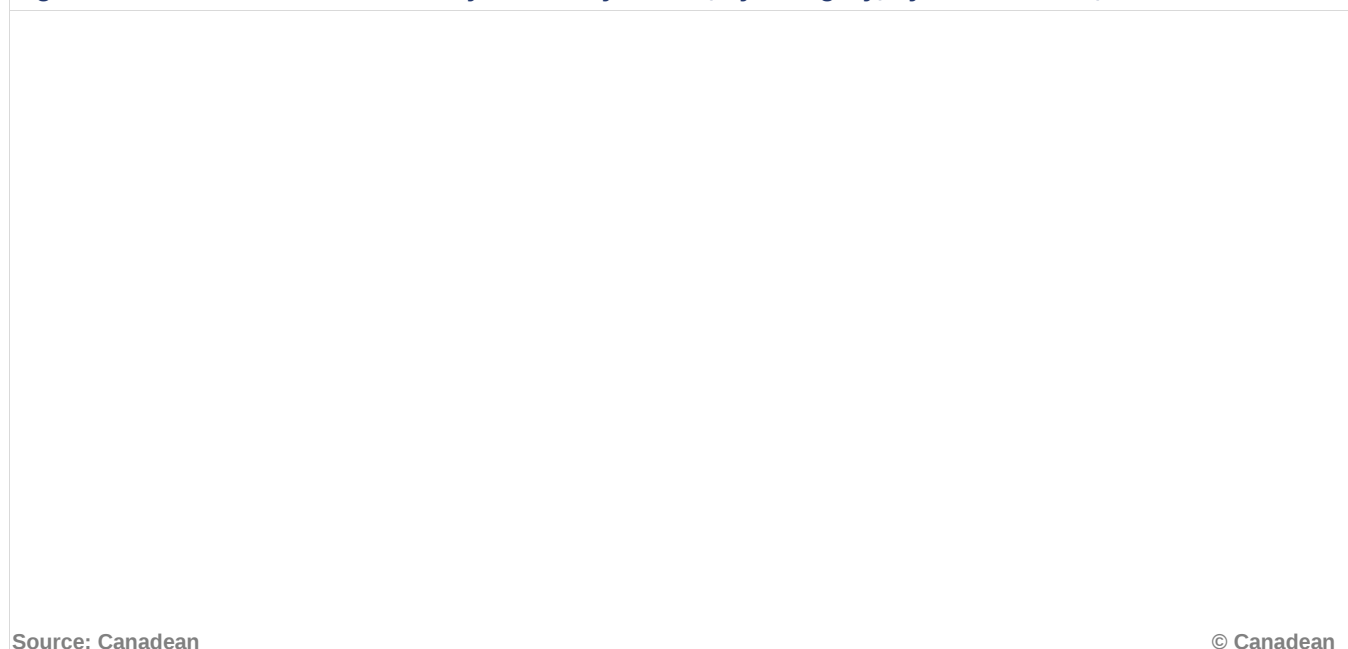
Figure 2: Saudi Arabia Confectionery Market Value (LCU m) by Category, 2007–17


2.1.3 Market Growth Dynamics by Value – Confectionery, 2007–17

Table 11: Saudi Arabia Confectionery Market Dynamics: past and future growth rates (2007–12 & 2012–17) and market size (2007, 2012 & 2017), by Category, by Value (LCU m)

Category	CAGR 2012–17	CAGR 2007–12	Market Size 2007	Market Size 2012	Market Size 2017
Chocolate					
Gum					
Sugar Confectionery					
Overall					
Source: Canadean			© Canadean		

Figure 3: Saudi Arabia Confectionery Market Dynamics, by Category, by Market Value, 2007–17



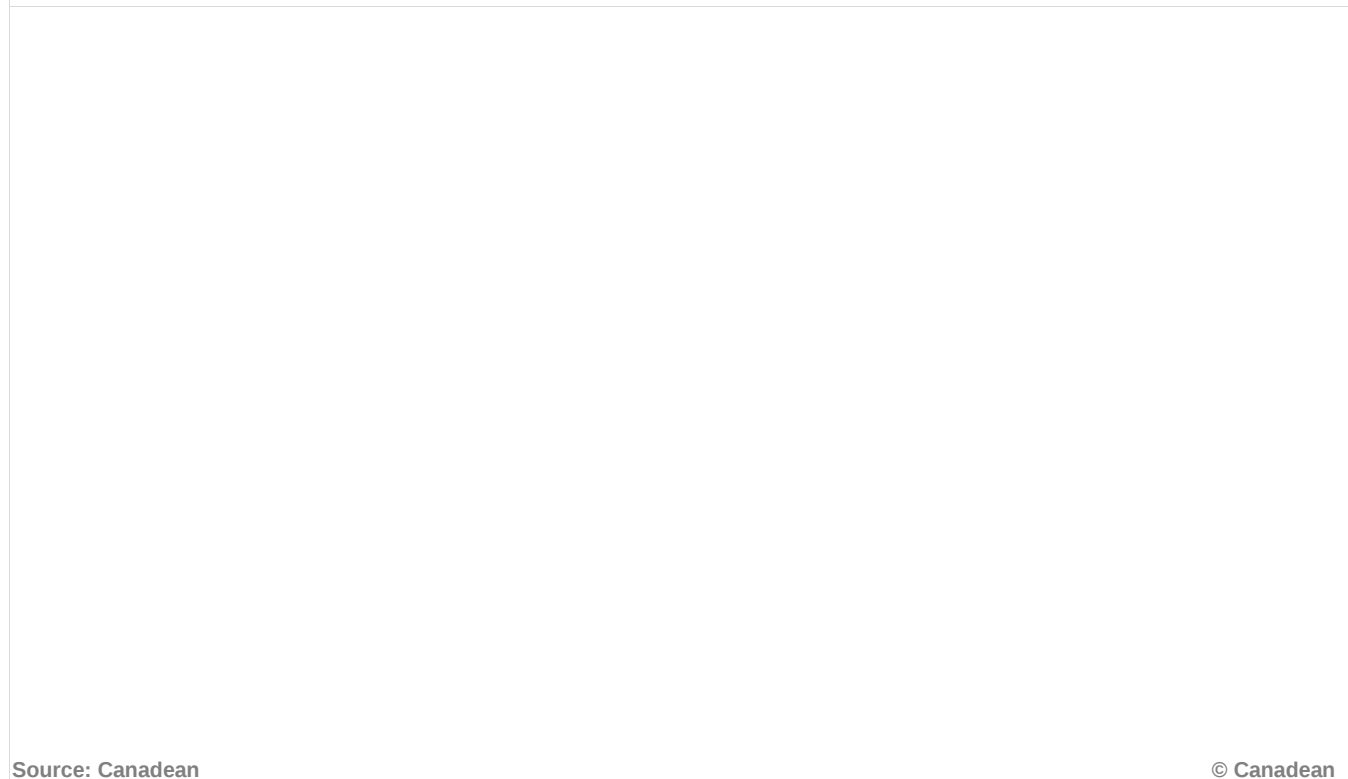
2.2 Confectionery Volume Analysis, 2007–17

2.2.1 Overall Confectionery Market Volume, 2007–17

Table 12: Saudi Arabia Confectionery Market Volume (Kg m) and Growth (Y-o-Y), 2007–17

Category	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Market Volume											
Y-o-Y growth											
Source: Canadean											© Canadean

Figure 4: Saudi Arabia Confectionery Market Volume (Kg m) and Growth (Y-o-Y), 2007–17

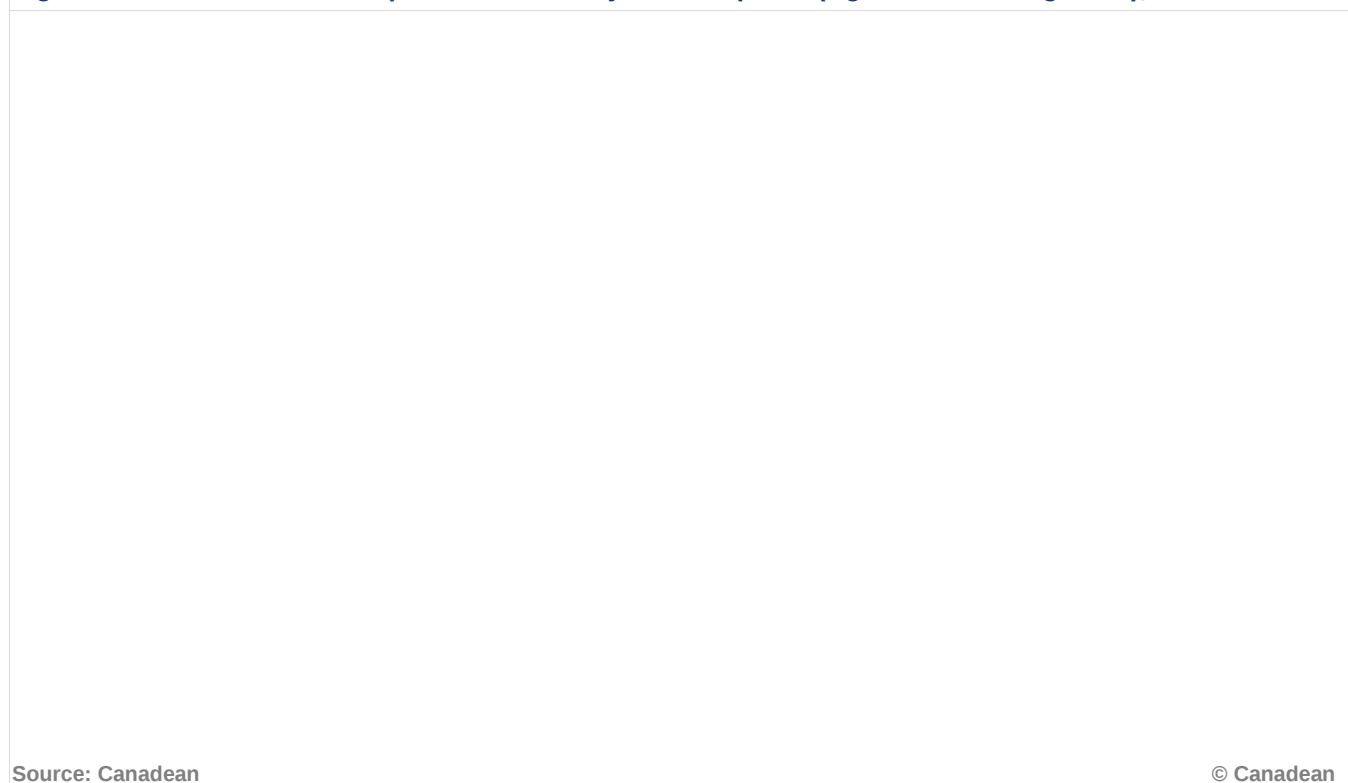


2.2.2 Per-Capita Consumption - Confectionery, 2007–17

Table 13: Saudi Arabia Per-capita Confectionery Consumption (Kg/head & Y-o-Y growth), 2007–17

Category	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Per-capita consumption											
Y-o-Y growth											
Source: Canadean											© Canadean

Figure 5: Saudi Arabia Per-Capita Confectionery Consumption (Kg/head & Y-o-Y growth), 2007–17



2.2.3 Confectionery Market Volume by Category, 2007–17

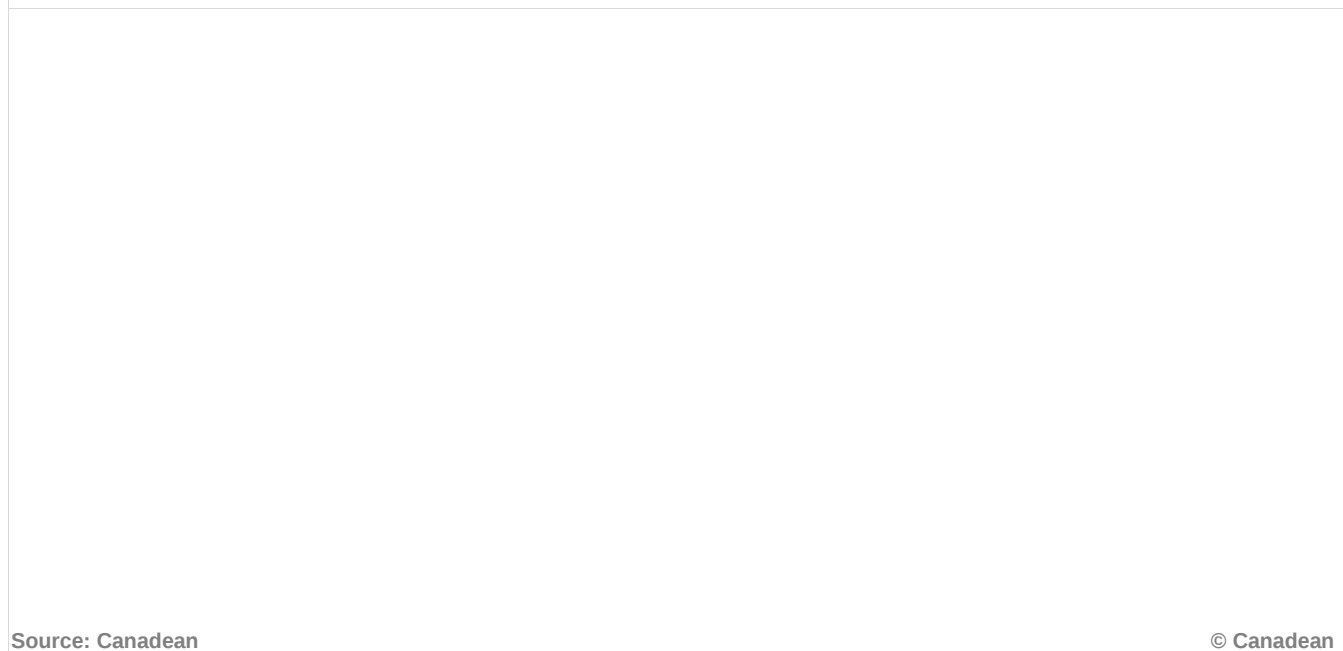
Table 14: Saudi Arabia Confectionery Market Volume (Kg m) by Category, 2007–12

Category	2007	2008	2009	2010	2011	2012	CAGR 2007–12
Chocolate							
Gum							
Sugar Confectionery							
Overall							
Source: Canadean							© Canadean

Table 15: Saudi Arabia Confectionery Market Volume (Kg m) by Category, 2012–17

Category	2012	2013	2014	2015	2016	2017	CAGR 2012–17
Chocolate							
Gum							
Sugar Confectionery							
Overall							
Source: Canadean							© Canadean

Figure 6: Saudi Arabia Confectionery Market Volume (Kg m) by Category, 2007–17



2.2.4 Market Growth Dynamics by Volume – Confectionery, 2007–17

Table 16: Saudi Arabia Confectionery Market Dynamics: past and future growth rates (2007–12 & 2012–17) and market size (2007, 2012 & 2017), by Category, by volume (Kg m)

Category	CAGR 2012–17	CAGR 2007–12	Market Size 2007	Market Size 2012	Market Size 2017
Chocolate					
Gum					
Sugar Confectionery					
Overall					
Source: Canadean			© Canadean		

Figure 7: Saudi Arabia Confectionery Market Dynamics, by Category, by Market Volume 2007–17

