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ISM 2016: The preferences in chocolate differ greatly across Europe

Exclusive SG survey on chocolate bars: Europe prefers it classic

Pure milk chocolate is particularly popular in Europe

However price increases are curbing people's appetite for chocolate almost everywhere

Chocolate is one of the top themes at ISM, the world's largest trade fair for sweets and snacks, from 31 January to 3 February 2016 in Cologne. In the run-up to the international industry get-together, SWEETS GLOBAL NETWORK commissioned Nielsen to find out more about the consumption in Europe. Here are the results: In the nine countries studied by Nielsen (Belgium, Germany, France, Great Britain, Italy, the Netherlands, Russia, Switzerland and Spain) chocolate bars are the top sellers among all of the product categories in the sweets sector. From the beginning of November 2014 until the end of October 2015, according to the exclusive SG survey, the consumers in these nine countries spent 6.541 billion Euros on bars of chocolate - almost 5 percent more than in the same period of the previous year.

The prices per kilogramme rose hereby on average by 65 Cent, i.e. by 6.5 Cents per 100 g bar. This price increase led to a slight decline in sales in all countries (-2.7 percent down to 694 million kilogrammes = 6.94 billion 100 g bars). Whereby the consumption volumes and chocolate turnovers differed greatly from country to country. In addition to traditional culinary aspects, this is not least due to the different price and income levels on the European Continent. Germany, which is well-known for its particularly low price level for sweets, is the undisputed leader in chocolate consumption with sales of around 213 million kilogrammes of chocolate bars. With a population of 67 million inhabitants, France only has a consumption of 115 million kilogrammes and compared to Germany the overall consumption in Russia is also only just under 133 million kilogrammes.



ISM
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www.ism-cologne.com

Your contact:
Christine Hackmann
Tel.
+49 221 821-2288
Fax
+49 221 821-3544
E-mail
c.hackmann@koelnmesse.de

Koelnmesse GmbH
Messeplatz 1
50679 Köln
P.O. Box 21 07 60
50532 Köln
Germany
Tel. +49 221 821-0
Fax +49 221 821-2574
info@koelnmesse.de
www.koelnmesse.de

Executive Board:
Gerald Böse (Chief Executive Officer)
Katharina C. Hamma
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Preference for "pure" chocolate without any other ingredients

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However, almost all countries share a preference for "pure" chocolate without further ingredients or fillings. With a 44.4 percent share of the volume, it ranks first in the list of Europe's most popular type of chocolate. In Italy and Spain the share is indeed over 60 percent. The majority of the French (55.8 percent) and the Dutch (54.6 percent) also prefer the simple variant. Overall, milk chocolate is by far the most popular flavour. Two thirds of all bars of chocolate sold in Europe are milk chocolate (except for in Great Britain). Germany is also the leader here with an over 80% share of the overall volume of chocolate bars. Due to the price increases the volume has however decreased slightly in the current survey period.

Yet, in individual countries types of chocolate with a wide range of ingredients have made it onto the favourites list of the chocolate consumers: For example, in Spain chocolate with almonds is the best seller, in France and Germany after pure chocolate, hazelnut chocolate is the most popular sort. Altogether the Germans prefer chocolate bars with chunky ingredients (share of chocolate sales: 36.9 percent). These are also particularly popular among the Russians, Swiss and French. The preferred ingredients here are hazelnuts and other nuts, fruit and nut as well as biscuits. Overall, chocolate with added ingredients accounts for a 29.6 percent share of the overall chocolate sales European-wide. However, this is a declining trend: The high increases in the raw material prices due to poor harvests, in particular in the case of hazelnuts, had a strong impact on the end consumer prices too (plus 12 percent).

Filled chocolate is in much higher demand in Germany than pure chocolate. Almost every third bar (31.8 percent) in the consumer's shopping trolley is filled with nougat, marzipan, yoghurt, milk-cream, etc. European-wide, filled bars rank third in the list of most important flavours with a share of 18.6 percent. The share has indeed increased over the past years. Growth in this category was particularly recorded on the retail markets in Germany, Russia, Italy and the Netherlands.

In France dark chocolate is the most popular

The Brits are very unique in terms of their preferences in chocolate. Here, in addition to pure milk chocolate, bars containing caramel, fruit & nut, whole nuts as well as peppermint are high up on the popularity scale. Dark and white chocolate on the other hand only plays a minor role. Overall, after simple chocolate, dark chocolate takes second place in the consumer rankings European-wide (excl. Great Britain). Its share is 27.5 percent and in spite of significant price increases, it has hardly experienced any declines in sales - and is thus showing an upward trend in the share of the volume. Dark chocolate is particularly experiencing strong growth rates in Spain: Where with a good 35 percent share of the total volume of chocolate bars, the consumption is well

above-average. The same also applies for France, where the highest shares of dark chocolate are recorded European-wide (48.5 percent), as well as for Italy (39.2 percent) and Belgium (34.2 percent). The share is much lower in the remaining countries, Germany particularly trails far behind its European neighbours with a share of 13.2 percent. Yet, the demand for dark chocolate is growing throughout the whole of Europe at a dynamic rate - especially in the countries of comparably minor importance - in terms of percentages. Without doubt, the increased popularity of dark chocolate is related to the increased awareness for health in Europe.

Decline in white chocolate

The number of fans of white chocolate in Europe is on the other hand limited. With a share of 5.3 percent of the total chocolate sales, white chocolate that is made purely using cocoa butter is a nonentity. This segment records higher shares in Belgium and the Netherlands than in the remaining countries. Almost every tenth bar of chocolate in Belgium is made out of white chocolate, in the Netherlands every eleventh bar. In the other countries only every 20th bar is made of white chocolate. The consumption is particularly below-average in France and Switzerland. However, the sales experienced double-digit growth in the Netherlands last year for instance, in all other countries the segment is declining.

Sweets Global Network e.V., Hans Strohmaier, Grillparzerstr. 38, D-81675 Munich
www.sg-network.org, h.strohmaier@sg-network.org

ISM 2016 compact:

Once again at the coming ISM, around 1,600 exhibitors from around 65 countries are awaited. The range of exhibits encompasses chocolate and chocolate products as well as sweets, biscuits and snacks as well as the new segments covering the themes snacking, to-go and breakfast.

The ISM is occupying Halls 2, 3, 4, 5, 10 and 11 of the fair grounds in Cologne, which corresponds to a gross exhibition surface area of 110,000 m². Of the approx. 37,000 trade visitors registered at the last ISM, 62 percent came from abroad from 145 countries.

ISM organisers are Koelnmesse and its industry sponsor, the International Sweets and Biscuits Fair (AISM) task force.

ProSweets Cologne - the international supplier fair for the sweets and snacks industry, comprising of around 340 exhibitors, will once again be staged parallel to ISM.

Together with ProSweets Cologne, ISM covers the entire value chain of sweets production and sales at the same time and place – a worldwide unique constellation.

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Both trade fairs are exclusively open to trade visitors.

Your contact:

Christine Hackmann
Communications Manager
Koelnmesse GmbH
Messeplatz 1
50679 Köln
Germany
Phone + 49 221 821 2288
Fax + 49 221 821 3544
c.hackmann@koelnmesse.de
www.koelnmesse.de

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Dairy Industry Conference
18.02.-20.02.2016, Karnal, Haryana, India

Wine & Gourmet Japan
13.-15.04.2016 in Tokyo

ANUFOOD Eurasia – powered by Anuga
14.-16.04.2016 in Istanbul

THAIFEX – World of Food Asia
25.-29.05.2016, Bangkok, Thailand