

Confectionery Products

Slight drop in Sweet Snack Market

The Sweet Snack market has a business volume of approximately 1.9 billion Euro, with over 1.300.000 tonnes of products sold in the Year to Date at January 2020 and accounts for around 11% of the Food Industry turnover. Compared to last year, there is a slight fall in both value and volume (-0.8% and -1.1%).

The average weekly assortment is composed of over 400 references, slightly higher than the previous year, in particular in Hypermarkets and Supermarkets. The promotional pressure of price cutting is 21.3%, which remains stable and at lower levels than the FMCG and Food Industry products average.

With regard to distribution channels, the difficulties for Hypermarkets (-5.2% in value) which represents the 16% of annual turnover, and for Small Self-Services, with a drop in value of 1.7%. Supermarket trends - a channel that develops 68% of turnover - is slightly positive in both value (+0.6%) and volume (+0.3%).

The sales of «Confectionery» products

	Volume sales Location	% Change	Number of weekly average ref. on ACV*	Change in number of references
Total Italy (Hyper+ Super+Small Self-Service)	100.0	-1.1	409.5	4.5
Hypermarkets	16.1	-5.3	640.7	7.1
Supermarkets	68.6	0.3	409.9	7.5
Small Self-Service	15.3	-2.8	133.5	0.3
North West	32.1	-0.5	516.5	5.9
North East	24.0	-0.4	425.5	4.7
Centre + Sardinia	22.7	-2.1	365.7	3.6
South	21.2	-1.8	257.0	0.4

Source: IRI Liquid Data® - Total Italy (Hyper+Super+Small Self-Service) - Year to Date at January 2020

*ACV: All Commodities Value (FMCG + General Merchandise + Random weight)

The Sweet Snack world groups several categories that have different dynamics.

Sweet Snacks, with a turnover of 493 Million Euro in the Year to Date at January 2020, is the most important market, but it is falling in both value and volume (-2.4% and -3.0%). However, the “Cereal-based” segment in Sweet Snacks is growing.

There is a negative performance for Chocolate Bars, Chocolate Eggs weighing less than 31 gr, Chewing Gum and «Freezer Ready» that together make up 30% of the total turnover for Sweet Snacks.

There is a general negative trend in the entire chocolate world, in particular for chocolate bars that have recorded a drop of more than 10 million Euro in the last year, and with negative trends in the last two years.

On the other hand, positive annual trends have been recorded for Pralines, Sweets, Sweet Snack Kits and Other Sweet Snacks.

Positive dynamics for Pralines, Sweets and Snack Kits

The Sweet Snack categories

	Sales in Value (€)	% Change	Sales in Volume (Kg)	% Change
Total Sweet snacks	1,851,857,525	-0.8	130,476,011	-1.1
Sweet snacks	492,644,950	-2.4	39,214,776	-3.0
Sweets	353,130,160	1.1	32,063,107	-0.3
Chocolate bars	344,487,594	-3.0	28,078,646	-3.8
Pralines - chocolates	290,596,919	2.9	14,562,948	3.8
Chewing gum	170,368,135	-1.8	4,293,151	-1.3
Chocolate eggs/balls <31g	59,642,829	-8.5	1,133,789	-9.4
Sweet snack kits	54,348,147	9.0	2,789,987	16.0
Filled eggs	39,382,460	2.3	3,283,894	3.4
Other Sweet snacks	33,645,564	1.5	2,699,578	2.5
Freeze-ready	13,610,767	-3.0	2,356,136	0.6

Source: IRI Liquid Data® -Total Italy Hyper+Super+Small Self-Service (from 100 to 399 m2) – Year to date at January 2020

All these changes are partly due to the evolution in the Italian consumer's habits, but the latest innovations launched in similar markets, such as Biscuits or Confectionery, for example, have offered the consumer good alternatives for a sweet break.

New alternatives to Sweet snacks



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IRI Italia, Via dei Missaglia 97, 20142 Milano Phone +39 02 52579 1

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