



# Passport

## SUGAR CONFECTIONERY IN COLOMBIA

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# LIST OF CONTENTS AND TABLES

Headlines .....	1
Trends .....	1
Competitive Landscape .....	2
Prospects .....	3
Category Data .....	4
Table 1      Sales of Sugar Confectionery by Category: Volume 2010-2015 .....	4
Table 2      Sales of Sugar Confectionery by Category: Value 2010-2015 .....	4
Table 3      Sales of Sugar Confectionery by Category: % Volume Growth 2010-2015 .....	4
Table 4      Sales of Sugar Confectionery by Category: % Value Growth 2010-2015 .....	5
Table 5      Sales of Pastilles, Gums, Jellies and Chews by Type: % Value Breakdown 2010-2015 .....	5
Table 6      NBO Company Shares of Sugar Confectionery: % Value 2011-2015 .....	5
Table 7      LBN Brand Shares of Sugar Confectionery: % Value 2012-2015 .....	6
Table 8      Distribution of Sugar Confectionery by Format: % Value 2010-2015 .....	7
Table 9      Forecast Sales of Sugar Confectionery by Category: Volume 2015-2020 .....	7
Table 10     Forecast Sales of Sugar Confectionery by Category: Value 2015-2020 .....	8
Table 11     Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2015-2020 .....	8
Table 12     Forecast Sales of Sugar Confectionery by Category: % Value Growth 2015-2020 .....	8

# SUGAR CONFECTIONERY IN COLOMBIA

## HEADLINES

- Sugar confectionery registers retail volume growth of 1% in 2015
- A significant number of consumers migrated to chocolate confectionery and to a lesser extent ice cream
- Medicated confectionery registers the strongest retail volume growth of 7%
- The 5% increase in the average unit price is above the rate of inflation (3%) due to categories with higher unit prices such as medicated confectionery and the increasing share of more sophisticated goods
- Colombina SA remains as the market leader by far in 2015 with a retail value share of 44% thanks to the strong positioning of its brands Bon Bon Bum and Coffee Delight
- Sugar confectionery is expected to register a retail volume CAGR of 1% over the forecast period driven by increasing disposable incomes

## TRENDS

- Sugar confectionery increased by 1% in retail volume terms in 2015. Moderate expansion continued due to a high degree of maturity, the health and wellness trend and consumers' migration toward substitute products considered more sophisticated, such as chocolate confectionery and ice cream. Increasing disposable incomes was the main positive driver of sugar confectionery. During 2015 the Colombian economy continued to expand, although at a slower pace – purchasing power improved, which in turn increased the potential consumer base.
- Higher disposable incomes and improved purchasing power also had a negative effect on the category as consumers sought more sophisticated goods. In 2015 the trend of consumers migrating to chocolate confectionery and to a lesser extent ice cream (both considered more sophisticated) continued.
- Volume growth in 2015 was the same as the CAGR registered over the review period, indicating that sugar confectionery's performance is part of a long-term trend. In recent years, consumer awareness of health and wellness issues increased, which encouraged moderation of sugar consumption. In the case of sugar confectionery, most consumers stop their consumption rather than migrate toward health and wellness options, which are very few in this category.
- Medicated confectionery registered the strongest retail volume growth of 7% in 2015. Starting from a low degree of maturity, demand for medicated confectionery is increasing due to urbanisation and busy lifestyles, as consumers are increasingly using the category's products rather than traditional remedies (such as honey) for gripes and minor throat infections. Also, players in the category increased their product ranges and advertising campaigns at points of sale, which expanded the consumer base as a significant number of Colombian consumers are still unfamiliar with these products.
- Boiled sweets declined by 4% in retail volume terms in 2015. The lack of innovation and migration towards pastilles, gums, jellies and chews were the main reasons for the strong

decline – leading players focused their marketing activities on other categories. For example, Colombina SA introduced a chews variant of its important boiled sweets brand Coffee Delight.

- The average unit price increase of 5% in current terms was greater than the increase in the rate of inflation (3%) as categories with higher unit prices, such as medicated confectionery, and more sophisticated products gained share.
- Marshmallow is the most important product within other sugar confectionery, although typical Colombian confectionery (which used to be only artisanal) is gaining ground. Firms such as Alimentos Copelia, are positioning products such as panelitas (stick milk sweet candy) or cocadas (Latin American traditional coconut candy), which are gaining visibility at points of sale.

## COMPETITIVE LANDSCAPE

- Colombina SA remained market leader by far in 2015 with a retail value share of 44%, thanks to the strong positioning of its brands Bon Bon Bum and Coffee Delight. Despite sugar confectionery's low growth trend, Colombina SA followed an innovative strategy and increased its portfolio of products with new launches such as Bombón Coffee Delight (launched in September 2014), a lollipop (chew) format of a well-positioned brand in boiled sweets. The company is adapting to consumers, increasing preference for chews rather than hard candies, which is evident in its marketing efforts in gums, where its brand Max gained popularity. The company's is a major player in packaged food overall, and has an extensive distribution network which allows it to reach consumers through the traditional grocery channel. This is key to the company's success, since independent small grocers is the most important distribution channel. Additionally the firm orientates its products to the standard and economy segments, which is why it follows a low-price strategy.
- Cadbury Adams Colombia SA ranked a distant second with a retail value share of 11%. The company remained the leader in medicated confectionery with its brand Halls, which is well positioned in consumers' minds, especially among young consumers. In May 2014, Cadbury Adams Colombia SA announced the closure of its factory in Cali (western Colombia) due to cost problems and that the Colombian market will be supplied via imports (mainly from Peru). The closure of the factory could have a negative effect on product distribution.
- Chocolates Triunfo was the weakest performer in 2015 with a negative current retail value growth of 14%. This was caused by the company's focus on other categories (mainly in chocolate confectionery) and participation in boiled sweets, which is declining since consumers are migrating to other products.
- Local players continued to dominate sugar confectionery in 2015 due to the importance of Colombina SA and mid-sized players such as Super de Alimentos SA and Comestibles Italo SA. Cadbury Adams Colombia SA was the most important international player, with its brands Halls and Sparkies in medicated confectionery and gums, respectively. Local firm take advantage of sugar farming in the west of Colombia, and is the reason why Colombina SA, Super de Alimentos SA and Cadbury Adams Colombia SA's factory were located in this area.
- The implementation of the free trade agreements with the US (in 2012) and the European Union (2013) saw the presence of premium international brands increase (for example, German gums brand E.Frutti imported by Morenos Ltda). Nevertheless, these products remain limited to niches in high-income segments, and the increase in the US dollar-peso exchange rate made imports more expensive, which further limited the potential consumer base.
- In September 2015 Colombina SA Launched Bon Bon Bum (lollipop brand) Limonada de Coco (coconut lemonade). The products, which were well received by the market, appeal to

consumers due to their refreshing flavours and centre containing cool gum. This launch was in line with consumers' preferences for mixes and new flavours rather than traditional ones.

- No packaging innovations were observed during 2015.
- Social networks and the internet are gaining importance as channels for positioning products and advertising. The consumer base for sugar confectionery consists largely of children and younger consumers, who are Internet-savvy and in some cases spend more time online than with traditional media such as radio or television.

## PROSPECTS

- Sugar confectionery is expected to register a retail volume CAGR of 1% over the forecast, driven by the increasing disposable incomes, which will raise purchasing power and extend the consumer base. Nevertheless, the pace of growth in the Colombian economy is expected to slow down over the forecast period. This will make it more difficult for the middle-to-low-income group – an important component of the consumer base – to increase in size.
- Over the forecast period consumers will continue to migrate towards other categories considered more sophisticated, especially chocolate confectionery, due to increasing disposable incomes and higher expectations. This, together with the health and wellness trend, will make it difficult for sugar confectionery to regain growth momentum. According to Euromonitor estimates, 35% of Colombia's population will be overweight in 2020, and health and wellness issues are set to become increasingly important.
- The retail volume CAGR of 1% expected over the forecast period is in line with that registered over the review period, which indicates that key trends will remain unchanged – apart from the rate of economic growth, which is expected to slow down.
- Medicated confectionery is expected to register the strongest retail volume CAGR of 5% over the forecast period. Increasing purchasing power among middle class consumers and further development of this category by manufacturers will drive growth. The good performance of medicated confectionery relative to overall sugar confectionery is likely to attract new players, which will increase the range of products available and reach a wider consumer base. Nevertheless, low penetration in traditional distribution channels could limit the category's expansion over the forecast period.
- Lollipops will remain the largest category and account for 44% of retail volume sales in sugar confectionery in 2020. Unlike in boiled sweets, players in lollipops invest more in innovation, for example Bombón Coffee Delight which was among the strongest performers in terms of retail volume growth in sugar confectionery in 2015.
- Sugar-free sugar confectionery products niches will expand on average to 3% CAGR in volume terms. Despite registering stronger growth than the overall category, these will remain niche products targeting mainly high-income consumers through modern grocery retailers. Sugar substitutes, such as stevia, are still unfamiliar to most consumers and its introduction is projected to be gradual. Consumers worried about sugar content are expected to reduce their consumption rather than migrate towards sugar-free products.
- Functionality is a potential growth driver for sugar confectionery over the forecast period. As was observed in 2015, categories such as dairy or non-alcoholic drinks found in functionality (for example, vitamin content) a source of growth in a context where consumers are increasingly focused on health and wellness.
- The average unit price is expected to register a CAGR of 1% (constant 2015 prices) over the forecast period driven mainly by further growth in (typically higher-priced) medicated

confectionery. With the end of the commodities boom, it is expected that the international price of sugar will be more stable over the forecast period than it was over the review period.

- The closure of Cadbury Adams Colombia SA's factory could undermine its distribution capacity in Colombia, due to the distances from ports to the main cities in the centre of the country. This space could be filled by firms such as Colombina SA and Super de Alimentos SA, with consolidated distribution networks.

## CATEGORY DATA

**Table 1 Sales of Sugar Confectionery by Category: Volume 2010-2015**

tonnes	2010	2011	2012	2013	2014	2015
Boiled Sweets	6,234.1	6,275.9	6,332.9	6,408.1	6,250.5	6,018.6
Liquorice	-	-	-	-	-	-
Lollipops	16,566.9	16,706.2	16,841.5	16,995.3	17,175.3	17,354.0
Medicated Confectionery	2,371.2	2,443.7	2,526.5	2,614.7	2,775.0	2,981.3
Mints	1,585.7	1,590.1	1,597.6	1,607.7	1,628.7	1,660.4
- Power Mints	-	-	-	-	-	-
- Standard Mints	1,585.7	1,590.1	1,597.6	1,607.7	1,628.7	1,660.4
Pastilles, Gums, Jellies and Chews	2,523.5	2,573.0	2,637.3	2,701.3	2,805.3	2,941.5
Toffees, Caramels and Nougat	3,322.0	3,410.9	3,506.3	3,587.6	3,305.4	3,189.2
Other Sugar Confectionery	4,795.3	4,858.1	4,924.2	4,992.1	5,069.2	5,149.8
<b>Sugar Confectionery</b>	<b>37,398.7</b>	<b>37,857.8</b>	<b>38,366.4</b>	<b>38,906.8</b>	<b>39,009.3</b>	<b>39,294.9</b>

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 2 Sales of Sugar Confectionery by Category: Value 2010-2015**

COP billion	2010	2011	2012	2013	2014	2015
Boiled Sweets	73.7	76.9	79.8	81.7	84.1	85.3
Liquorice	-	-	-	-	-	-
Lollipops	131.2	133.0	134.7	137.6	143.2	148.8
Medicated Confectionery	69.8	76.8	81.9	87.1	95.8	106.7
Mints	47.4	48.8	50.5	51.7	53.7	56.2
- Power Mints	-	-	-	-	-	-
- Standard Mints	47.4	48.8	50.5	51.7	53.7	56.2
Pastilles, Gums, Jellies and Chews	33.0	34.5	36.0	37.6	39.5	41.9
Toffees, Caramels and Nougat	35.5	37.4	39.3	40.9	39.0	38.8
Other Sugar Confectionery	99.1	103.1	106.9	111.8	119.3	127.4
<b>Sugar Confectionery</b>	<b>489.8</b>	<b>510.5</b>	<b>529.0</b>	<b>548.4</b>	<b>574.5</b>	<b>605.2</b>

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 3 Sales of Sugar Confectionery by Category: % Volume Growth 2010-2015**

% volume growth	2014/15	2010-15 CAGR	2010/15 Total
Boiled Sweets	-3.7	-0.7	-3.5
Liquorice	-	-	-
Lollipops	1.0	0.9	4.8
Medicated Confectionery	7.4	4.7	25.7
Mints	2.0	0.9	4.7
- Power Mints	-	-	-
- Standard Mints	2.0	0.9	4.7
Pastilles, Gums, Jellies and Chews	4.9	3.1	16.6
Toffees, Caramels and Nougat	-3.5	-0.8	-4.0
Other Sugar Confectionery	1.6	1.4	7.4
Sugar Confectionery	0.7	1.0	5.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 4 Sales of Sugar Confectionery by Category: % Value Growth 2010-2015**

% current value growth	2014/15	2010-15 CAGR	2010/15 Total
Boiled Sweets	1.4	2.9	15.6
Liquorice	-	-	-
Lollipops	3.9	2.6	13.4
Medicated Confectionery	11.4	8.8	52.7
Mints	4.7	3.5	18.6
- Power Mints	-	-	-
- Standard Mints	4.7	3.5	18.6
Pastilles, Gums, Jellies and Chews	6.1	4.9	26.9
Toffees, Caramels and Nougat	-0.4	1.8	9.3
Other Sugar Confectionery	6.9	5.2	28.5
Sugar Confectionery	5.3	4.3	23.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5 Sales of Pastilles, Gums, Jellies and Chews by Type: % Value Breakdown 2010-2015**

% retail value rsp	2010	2011	2012	2013	2014	2015
Pastilles	33.2	33.2	33.3	33.2	33.2	33.6
Gums, Jellies and Chews	66.8	66.8	66.8	66.8	66.9	66.4
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 6 NBO Company Shares of Sugar Confectionery: % Value 2011-2015**

% retail value rsp	2011	2012	2013	2014	2015
Company					
Colombina SA	43.2	42.3	42.6	43.9	44.4
Cadbury Adams Colombia SA	9.6	9.8	10.0	10.6	11.4

Super de Alimentos SA	3.2	3.2	4.7	7.8	7.9
Nestlé de Colombia SA	6.3	6.3	6.1	6.1	5.9
Comestibles Italo SA	6.2	6.1	6.0	5.9	5.8
Comestibles Aldor SA	5.0	5.1	5.1	4.6	4.5
Chocolates Triunfo SA	6.9	6.9	6.5	5.0	4.1
Procter & Gamble de Colombia SA	3.0	2.9	3.0	2.5	2.6
Wyeth Inc, Laboratorios	1.0	1.0	1.0	1.2	1.3
Novartis de Colombia SA	0.9	1.0	1.1	1.1	1.1
Tecnoquímicas SA	0.7	0.9	0.9	0.9	1.0
Ferrero Rocher del Ecuador SA	0.6	0.6	0.6	0.6	0.5
Alimentos Especializados Ales Ltda	0.3	0.3	0.3	0.4	0.4
Effem Colombia Ltda	0.2	0.2	0.2	0.2	0.2
Trolli Iberica SA	0.2	0.2	0.2	0.2	0.2
Dulces Emilita Ltda	0.0	0.0	0.1	0.2	0.2
Morenos Ltda	-	-	-	0.2	0.1
Dulces De Colombia SA	3.6	3.6	2.0	0.2	-
Nabisco Royal Colombiana SA	-	-	-	-	-
Quala SA	-	-	-	-	-
Others	9.1	9.5	9.6	8.6	8.3
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 7 LBN Brand Shares of Sugar Confectionery: % Value 2012-2015**

% retail value rsp	Company	2012	2013	2014	2015
Bon Bon Bum	Colombina SA	12.8	12.7	12.6	12.5
Halls	Cadbury Adams Colombia SA	9.0	9.2	9.7	10.5
Millocks	Colombina SA	7.5	7.7	8.2	8.6
Colombina	Colombina SA	6.5	6.5	6.3	6.2
Italo	Comestibles Italo SA	6.0	5.8	5.8	5.7
Coffee Delight	Colombina SA	2.6	2.7	3.4	3.9
Yogueta	Comestibles Aldor SA	3.8	3.8	3.4	3.2
Fox's	Nestlé de Colombia SA	3.7	3.6	3.4	3.1
Chocmelos	Colombina SA	2.6	2.6	2.9	3.0
Beso de Negra	Nestlé de Colombia SA	2.4	2.4	2.5	2.7
Vick	Procter & Gamble de Colombia SA	2.9	3.0	2.5	2.6
Triunfo	Chocolates Triunfo SA	5.1	4.7	3.3	2.5
Colombinetas	Colombina SA	2.4	2.4	2.3	2.2
Big Ben	Super de Alimentos SA	0.2	1.3	2.1	2.1
Frutitas	Colombina SA	2.2	2.2	2.2	2.0
Super Coco	Super de Alimentos SA	1.0	1.3	2.0	2.0
Snow Mint	Colombina SA	1.0	1.1	1.6	1.9
Menta Helada	Colombina SA	2.2	2.1	1.9	1.8
Pirulito	Colombina SA	2.0	2.0	1.8	1.6
Robitussets	Wyeth Inc, Laboratorios	1.0	1.0	1.2	1.3
Barrilete	Super de Alimentos SA	0.5	0.6	1.2	1.2
Frunas	Comestibles Aldor SA	1.2	1.2	1.2	1.2
Lokiño	Super de Alimentos SA	0.3	0.3	1.1	1.2
Mebucaina	Novartis de Colombia SA	1.0	1.1	1.1	1.1
Noraver Garganta	Tecnoquímicas SA	0.9	0.9	0.9	1.0
Sparkies	Cadbury Adams Colombia SA	0.8	0.8	0.8	0.9



Melositas	Chocolates Triunfo SA	0.9	0.9	0.8	0.8
Menta Fría	Chocolates Triunfo SA	0.9	0.9	0.8	0.8
Max	Colombina SA	0.6	0.6	0.6	0.7
Chao	Super de Alimentos SA	0.3	0.3	0.5	0.5
Caramelo Noel	Dulces De Colombia SA	1.9	1.1	-	-
Dragus	Dulces De Colombia SA	1.5	0.7	-	-
Others		12.3	12.4	11.7	11.2
Total		100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 8** Distribution of Sugar Confectionery by Format: % Value 2010-2015

% retail value rsp	2010	2011	2012	2013	2014	2015
Store-Based Retailing	100.0	100.0	100.0	100.0	100.0	100.0
- Grocery Retailers	96.1	94.6	94.6	95.7	96.0	96.2
-- Modern Grocery Retailers	40.9	40.0	39.4	39.6	39.7	39.8
--- Convenience Stores	0.4	0.5	0.6	0.6	0.6	0.6
--- Discounters	-	-	-	-	-	-
--- Forecourt Retailers	0.2	0.2	0.2	0.2	0.2	0.2
--- Hypermarkets	21.0	20.8	20.8	21.2	21.2	21.3
--- Supermarkets	19.3	18.5	17.8	17.6	17.7	17.8
-- Traditional Grocery Retailers	55.2	54.6	55.3	56.1	56.3	56.3
--- Food/drink/tobacco specialists	8.8	9.7	10.6	11.1	11.1	11.1
--- Independent Small Grocers	39.5	39.7	40.7	41.5	41.7	41.8
--- Other Grocery Retailers	6.9	5.2	4.0	3.5	3.5	3.5
- Non-Grocery Specialists	0.1	0.1	0.1	0.1	0.1	0.1
-- Health and Beauty Specialist Retailers	0.1	0.1	0.1	0.1	0.1	0.1
-- Other Foods Non-Grocery Specialists	-	-	-	-	-	-
- Mixed Retailers	3.8	5.3	5.3	4.2	3.9	3.7
Non-Store Retailing	-	-	-	-	-	-
- Vending	-	-	-	-	-	-
- Homeshopping	-	-	-	-	-	-
- Internet Retailing	-	-	-	-	-	-
- Direct Selling	-	-	-	-	-	-
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 9** Forecast Sales of Sugar Confectionery by Category: Volume 2015-2020

tonnes	2015	2016	2017	2018	2019	2020
Boiled Sweets	6,018.6	5,839.8	5,717.5	5,632.6	5,565.8	5,513.2
Liquorice	-	-	-	-	-	-
Lollipops	17,354.0	17,516.5	17,664.1	17,798.1	17,919.6	18,029.7
Medicated Confectionery	2,981.3	3,180.8	3,351.1	3,494.6	3,614.3	3,713.4

Mints	1,660.4	1,689.6	1,716.3	1,740.7	1,763.0	1,783.3
- Power Mints	-	-	-	-	-	-
- Standard Mints	1,660.4	1,689.6	1,716.3	1,740.7	1,763.0	1,783.3
Pastilles, Gums, Jellies and Chews	2,941.5	3,055.8	3,150.8	3,229.1	3,293.3	3,352.3
Toffees, Caramels and Nougat	3,189.2	3,116.7	3,081.7	3,072.6	3,087.3	3,102.9
Other Sugar Confectionery	5,149.8	5,223.6	5,290.9	5,352.3	5,408.1	5,458.9
Sugar Confectionery	39,294.9	39,622.8	39,972.4	40,320.0	40,651.4	40,953.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 10 Forecast Sales of Sugar Confectionery by Category: Value 2015-2020**

COP billion	2015	2016	2017	2018	2019	2020
Boiled Sweets	85.3	83.8	82.9	82.3	81.9	81.5
Liquorice	-	-	-	-	-	-
Lollipops	148.8	149.6	150.3	150.9	151.5	152.0
Medicated Confectionery	106.7	114.1	120.5	125.9	130.4	134.1
Mints	56.2	57.0	57.8	58.7	59.5	60.3
- Power Mints	-	-	-	-	-	-
- Standard Mints	56.2	57.0	57.8	58.7	59.5	60.3
Pastilles, Gums, Jellies and Chews	41.9	42.8	43.6	44.2	44.7	45.2
Toffees, Caramels and Nougat	38.8	38.0	37.6	37.6	37.9	38.2
Other Sugar Confectionery	127.4	131.6	135.6	139.3	142.7	145.7
Sugar Confectionery	605.2	616.9	628.2	638.9	648.6	657.2

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 11 Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2015-2020**

% volume growth	2015/16	2015-20 CAGR	2015/20 Total
Boiled Sweets	-3.0	-1.7	-8.4
Liquorice	-	-	-
Lollipops	0.9	0.8	3.9
Medicated Confectionery	6.7	4.5	24.6
Mints	1.8	1.4	7.4
- Power Mints	-	-	-
- Standard Mints	1.8	1.4	7.4
Pastilles, Gums, Jellies and Chews	3.9	2.6	14.0
Toffees, Caramels and Nougat	-2.3	-0.5	-2.7
Other Sugar Confectionery	1.4	1.2	6.0
Sugar Confectionery	0.8	0.8	4.2

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 12 Forecast Sales of Sugar Confectionery by Category: % Value Growth 2015-2020**

% constant value growth	2015/2016	2015-20 CAGR	2015/20 TOTAL
Boiled Sweets	-1.7	-0.9	-4.3
Liquorice	-	-	-
Lollipops	0.5	0.4	2.1
Medicated Confectionery	7.0	4.7	25.8
Mints	1.4	1.4	7.3
- Power Mints	-	-	-
- Standard Mints	1.4	1.4	7.3
Pastilles, Gums, Jellies and Chews	2.0	1.5	7.9
Toffees, Caramels and Nougat	-2.2	-0.3	-1.6
Other Sugar Confectionery	3.3	2.7	14.4
Sugar Confectionery	1.9	1.7	8.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources