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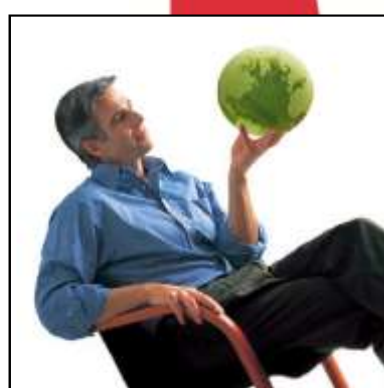
Markets
Bureau

MARKET INDICATOR REPORT | DECEMBER 2012

Consumer Trends
Sweet and Savoury Snacks in France

Source: *Planet Retail, 2012*



Growing Forward

Canada

MARKET SNAPSHOT

- France's snack market has benefitted from a developed consumer market, the country's position as second-largest economy in Europe, and a population that is the second-largest in Western Europe, comparable in size to those of the United Kingdom and Italy.

- Economic growth was 1.7% in 2011, and in 2012, France is expected to see growth of 1.4% and a gross domestic product of US$2.6 trillion. However, global economic uncertainty has made consumers price-sensitive, a trend that is expected to continue in the near future (Planet Retail, 2012).

- Despite economic fluctuations, France's sweet and savoury snack market* grew consistently from 2006 to 2011, reaching a value of US$1.7 billion. The market is expected to continue growing, but at a slower rate from 2011 to 2016, reaching a forecast value of nearly US$1.9 billion.

- Within the sweet and savoury snack market in France, chips/crisps have the largest share and experienced the fastest growth from 2006 to 2011. They are also expected to grow the fastest from 2012 to 2016, followed by nuts and popcorn.

- Several consumer trends are driving growth in France's snack market as well as evolutions in new product development. Consumer interest in health and wellness, including concern for obesity, is driving demand for healthier snack options and formulations.

- Demand for quality products and ethnic cuisines, combined with price-sensitivity, is also leading to private label snack development, including premium private label products. These trends are predicted to lead future product development, along with the growing popularity of pre-dinner appetizers. All of these trends are evident in recent snack launches within the past year (Euromonitor International; 2012, Mintel, 2012).

*The sweet and savoury snack market includes: chips/crisps, extruded snacks, fruit snacks, nuts, popcorn, pretzels, tortilla/corn chips, and any other sweet and savoury snack products not included in the previous categories, such as fruit and nut mixes. This category does not include confectionery products like candies or chocolates.

INSIDE THIS ISSUE

Source: *Planet Retail, 2012.*

RETAIL SALES

- Several consumer trends and consumption behaviours have supported the growth of France's sweet and savoury snack market, such as consumers continuing to eat more at home instead of dining out. This, combined with warmer patio weather in 2011 and the popularity of picnics and aperitifs (pre-dinner cocktails)[1], has sustained demand for sweet and savoury snack products. Pre-dinner aperitifs are a traditional occasion in French households, with roughly 90% of households having at least one aperitif a week in 2011. This has fuelled consumption of snacks/hors d'oeuvres as pre-dinner aperitif accompaniments. The aperitif dinatoire (drinks and a buffet dinner), which first appeared in France in 2007, has also become increasingly popular.

- Households are spending increasing amounts on sweet and savoury snacks in the past decade, from US$51.0 per household in 2000 to US$64.6 in 2012. From 2006 to 2011[2], France's sweet and savoury snack market grew by a compound annual growth rate (CAGR) of 3.3%, to reach a value of US$1.7 billion in 2011. Average unit prices have been increasing, due to rising food prices and more premium products in the market that are raising the average unit price, and this is expected to continue from 2011 to 2016.

- Within the sweet and savoury snack market, chips/crisps experienced the most growth from 2006 to 2011, with a CAGR of 6.3%, followed by popcorn (3.9%), and nuts (3.2%). New flavour launches and healthier options, as well as the versatility of being eaten on their own or as a side dish to a meal, are expected to increase consumption of chips/crisps in the near future. From 2011 to 2016[3], chips/crisps are forecast to continue to record the highest growth with a CAGR of 3.3%, followed by popcorn and nuts, each with a CAGR of 1.3% over the same period.

- The continuance of trends such as eating at home and aperitifs/*aperitif dinatoires* should help support continued growth in the sweet and savoury snack market. The popularity of health and wellness trends should also drive new product development for healthy sweet and savoury snacks in the market. However, increasing competition in the market may also slow value sales. In the future, growth in the sweet and savoury snack market is forecast to remain positive, but with a slower CAGR of 1.6% from 2011 to 2016 (Euromonitor International, 2012).

Sweet and Savoury Snack Market Sizes in France
Historic/Forecast* Retail Value Sales in US$ millions from 2006 to 2016**

Categories	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Sweet and Savoury Snacks	**1,445.3**	**1,464.2**	**1,491.6**	**1,557.6**	**1,603.7**	**1,702.2**	**1,789.2**	**1,824.9**	**1,846.8**	**1,858.7**	**1,871.0**
Chips/crisps	355.3	374.1	400.2	427.8	446.8	482.2	515.1	537.4	552.4	563.3	575.4
Extruded snacks	370.7	367.4	367.1	377.3	385.3	405.6	420.2	424.8	426.7	427.0	427.2
Fruit snacks	158.6	157.3	157.8	156.7	158.4	166.4	173.0	174.9	176.0	175.3	173.7
Nuts	405.7	409.0	406.6	433.2	445.8	474.6	502.7	509.0	512.0	512.5	513.7
Popcorn	20.3	20.9	21.6	22.4	23.6	24.5	25.4	25.6	25.9	26.3	26.6
Pretzels	38.9	38.6	39.2	40.5	41.4	43.0	44.0	43.6	43.4	43.4	43.3
Tortilla/corn chips	66.8	67.6	69.2	69.6	71.5	74.3	76.6	77.4	78.0	78.5	79.1
Other sweet and savoury snacks	28.9	29.3	29.7	30.1	30.9	31.6	32.1	32.3	32.4	32.2	32.0

***Source:** Euromonitor International, 2012. *Constant Prices **Fixed 2012 Exchange Rates*

[1] In the body of this report, the word "aperitif" refers to a pre-dinner cocktail. However, the word can also be used as a form of the word "appetizer," as seen in the new snack launches highlighted on pages 10-12 of this report.
[2] Fixed 2012 exchange rates.
[3] Constant 2012 prices, fixed 2012 exchange rates.

COMPETITIVE LANDSCAPE

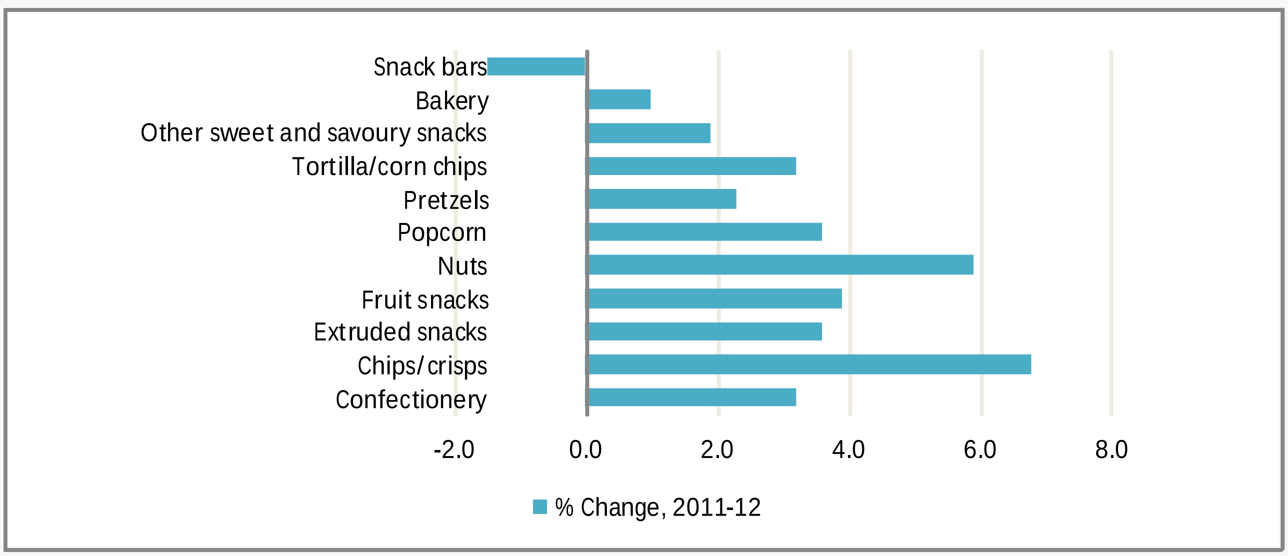
- Sweet and savoury snacks include a variety of products which compete against one another. However, there can also be competition from other types of products that compete for attention when consumers crave a snack, such as snack bars, and bakery and confectionery products. Sweet and savoury snacks don't compete directly with these products for consumption with aperitifs. However, there can be competition from other substitute products that can also be consumed with aperitifs, such as vegetable mixes paired with a sour cream dipping sauce.

- Although the market values of various sweet and savoury snack categories have all grown over the past year (2011 to 2012), bakery and confectionery products also grew, while snack bars declined. Of sweet and savoury snacks, chips/crisps experienced the largest market increase from 2011 to 2012, followed by nuts and fruit snacks. Fruit snacks, such as prunes and apricots, are increasing in popularity, especially among athletic consumers, as they are seen as a healthier, more natural snack.

- In the future, the ongoing popularity of aperitif consumption occasions may lead to decreased demand for more traditional sweet and savoury snacks such as chips/crisps and extruded snacks. Other snacks that are well-suited to aperitif accompaniments and aperitif dinatoires, such as tapenades and dips, will provide competition.

- Private label products comprised a notable share of the sweet and savoury snack market (34%), and fared better than branded products in 2010, due to increasing popularity among consumers. However, consumers are less concerned with prices when it comes to products such as chips/crisps, and brand equity is still fairly high in the sweet and savoury snack category. In the near-to-medium term, brands are expected to remain competitive by continuing to launch new products, particularly healthy snacks (Euromonitor International, 2012).

Performance of Sweet and Savoury Snacks and Selected Competing Categories in France – % Change in Market Size from 2011 to 2012



Source: *Euromonitor International, 2012*

CONSUMER ATTITUDES

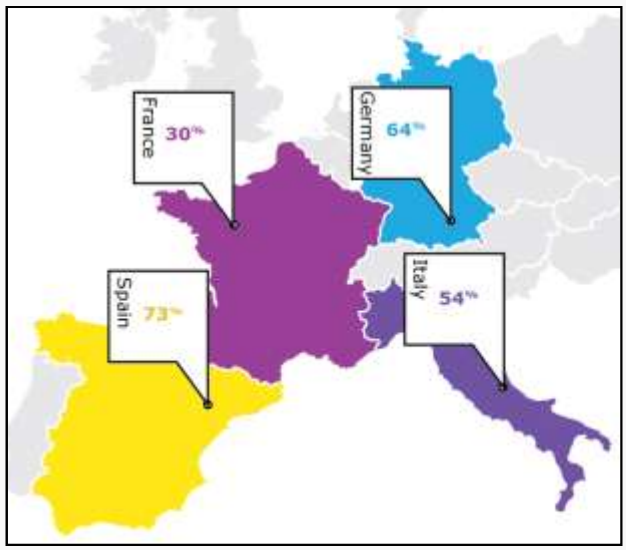
- In a 2011 study by Euromonitor International, the peak snack times for consumers in France were in the mid-morning (10 a.m.) and in the mid/late afternoon (around 4 p.m. and 5 p.m.). Peak dinner time is around 7 p.m. and 8 p.m. However, France is not a particularly strong snacking country, as consumers tend to have less than two snacks a day. This is less than in Germany, the United Kingdom and the United States. Sweet snacks tend to be consumed earlier in the day, while savoury snacks tend to be more popular in the late afternoon/evening. Traditionally, lunch has been a significant meal in France. However, due to daily work hours this is changing, with a greater focus on dinner as the main meal occasion. During the weekend, some consumers will eat snacks for lunch, leaving dinner as their main meal.

- While aperitifs and *aperitif dinatoires* are benefitting some aspects of the sweet and savoury snack market, other trends, such as health concerns, are leading to shifts in the category. Snack products that are perceived as healthier, such as fruit snacks and natural products, as well as healthier versions of traditional snacks, such as organic chips/crisps with reduced salt and fat, are increasingly appearing. Claims of no additives/preservatives are also becoming more prevalent, reflecting another growing health concern among French consumers. These concerns are expected to continue affecting the sweet and savoury snack market in the near future (Euromonitor International, 2012).

- When it comes to what their children are eating, French parents are cautious about snacks. In a January 2012 survey by Mintel, French parents who consume salty snacks were more likely to be strict about their children's salty snack choices, compared to other similar European markets. More than half (53%) of these French parents were less likely to allow their children to eat salty snacks or crisps. As a result, opportunities in the market may be present in healthier snack options that highlight the positive health attributes and benefits of the product. Due to concerns about childhood obesity, vending machines that sell snacks such as chips or chocolate bars are prohibited in schools (Euromonitor International, 2012).

- Premium private label snack products have also performed well in the market, largely attributable to French consumers looking for improved snacking experiences without the higher price tag.

Agreement with the statement "My children have an input into what crisps/salty snacks we eat," by country, January 2012



Source: *Mintel, 2012*

- Consumers in France also enjoy a variety of ethnic dishes, a fact that snack food manufacturers are responding to with new product launches. Mediterranean cuisine (such as tapas and seafood hors d'oeuvres), wasabi chips and sushi, and other Asian and Moroccan hors d'oeuvres are all notable in new snack launches (Euromonitor International, 2012, Mintel, 2012).

COMPANY AND BRAND SHARES

Sweet and Savoury Snacks – Top 25 Brand Shares in France Based on % Retail Values Sales from 2006 to 2011

Local Brand Name	Company (National Brand Owner)	2006	2007	2008	2009	2010	2011
Lay's	PepsiCo France SNC	8.4	8.7	9.1	9.8	10.1	10.4
Bénénuts	PepsiCo France SNC	6.4	6.3	6.1	6.1	6.4	6.7
Leclerc (Private Label)	Galec - Centre Distributeur Edouard Leclerc	5.2	5.4	5.6	6.0	6.1	5.9
Lorenz Snack-World	Intersnack France SAS	-	5.8	5.8	5.7	5.6	5.6
Vico	Intersnack France SAS	-	5.0	5.1	5.0	5.0	5.1
Carrefour (Private Label)	Carrefour SA	3.2	3.3	3.5	3.8	3.9	3.8
Pringles	Procter & Gamble France SNC	3.8	3.9	3.9	3.6	3.5	3.7
Intermarché (Private Label)	ITM Entreprises SA	2.5	2.6	2.7	2.9	3.0	3.0
Curly	Intersnack France SAS	-	3.2	3.2	2.6	2.5	2.4
Chipsters	LU SA	-	2.9	2.8	2.6	2.4	2.3
Menguy's	Menguy's	1.9	1.8	1.8	1.9	2.0	2.0
Doritos	PepsiCo France SNC	2.6	2.4	2.2	2.1	1.9	1.9
Ancel	Dr Oetker Ancel SAS	1.9	1.9	2.0	1.9	1.9	1.9
Maitre Prunille	Maitre Prunille SA	1.7	1.7	1.7	1.7	1.7	1.6
Bret's	Altho SAS	1.0	1.2	1.6	1.5	1.5	1.6
Peppies	Intersnack France SAS	-	1.2	1.2	1.4	1.4	1.4
Cheetos	PepsiCo France SNC	1.5	1.4	1.3	1.3	1.2	1.2
Old El Paso	General Mills France SAS	1.3	1.3	1.3	1.3	1.3	1.2
Crunchips	Intersnack France SAS	-	1.5	1.2	1.1	1.0	1.0
Monster Munch	Intersnack France SAS	-	1.3	1.2	1.1	1.0	1.0
Jack Benoit	Benoit SNC	1.8	0.9	0.8	0.8	0.8	0.8
Casa Fiesta Tortilla Chips	Santa Maria AB	-	-	-	-	0.8	0.8
Carrefour (Private Label)	Carrefour France SA	0.8	0.8	0.8	0.8	0.7	0.7
Maxi Pop	Menguy's	0.5	0.5	0.6	0.6	0.7	0.7
Mélange Extra	Intersnack France SAS	-	0.8	0.8	0.7	0.7	0.6
Other Private Label	Other Private Label	17.1	17.7	18.5	19.4	19.8	19.5
Others	Others	38.3	16.4	15.2	14.3	12.9	12.8
Total	**Total**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: *Euromonitor, 2012. Totals may not equal exactly 100 due to rounding.*

- As the leading player in France's sweet and savoury snack market, PepsiCo France SNC held a 21.2% value share in 2011, followed by Intersnack France SAS, with 17.6%, and Galec - Centre Distributeur Edouard Leclerc with a 5.9% share. PepsiCo France's market share rose slightly (1.6%) from 2007 to 2011. However, Intersnack France appears to have faced the most competition from private label players in the market, experiencing a slight drop of 1.7% in share from 2007 to 2011. International manufacturers represent roughly half of sweet and savoury snack retail sales.

- Manufacturer strategies that have focused on natural and healthy product innovations are increasingly successful in the market. PepsiCo's strategy in the market involves significant marketing and an innovation focus, as well as a wide product offering with key brands in each category. The company also has a "naturalizing" strategy, that includes activities such as healthier recipe launches, which has contributed to PepsiCo's success in the market. For example, the company's new Lay's Cuites au Four product contains 70% less fat (Euromonitor International, 2012).

DISTRIBUTION CHANNELS

Sales of Sweet and Savoury Snacks in France by Distribution Format Based on % Retail Value Sales from 2006 to 2011

Store Format/Type	2006	2007	2008	2009	2010	2011
Store-based retailing	99.7	99.7	99.7	99.7	99.5	99.5
Grocery retailers	99.0	99.1	99.3	99.3	98.7	98.8
Supermarkets/hypermarkets	75.7	75.8	76.0	76.3	76.1	76.2
Discounters	18.3	18.2	18.2	18.2	18.1	18.0
Small grocery retailers	4.0	4.1	4.2	4.0	3.7	3.8
Convenience stores	0.7	0.9	1.0	0.9	0.9	1.0
Independent small grocers	2.6	2.5	2.4	2.3	2.0	2.0
Forecourt retailers	0.7	0.7	0.8	0.8	0.8	0.8
Other grocery retailers	1.0	1.0	1.0	0.8	0.8	0.8
Non-grocery retailers	0.8	0.7	0.5	0.4	0.8	0.7
Health and beauty retailers	-	-	-	-	-	-
Other non-grocery retailers	0.8	0.7	0.5	0.4	0.8	0.7
Non-store retailing	0.3	0.3	0.3	0.3	0.5	0.5
Vending	0.2	0.2	0.2	0.2	0.2	0.2
Homeshopping	-	-	-	-	-	-
Internet retailing	0.1	0.1	0.1	0.1	0.3	0.3
Direct selling	-	-	-	-	-	-
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: *Euromonitor, 2012*

- Store-based retailing accounts for nearly all (99.5%) sweet and savoury snack sales in France. Grocery retailers are strong leaders for this category, representing 98.8% of sales in 2011, with supermarkets/hypermarkets accounting for just over three-quarters of sales in that category (76.2%), and discounters accounting for 18.0% of sales.

Source: *Planet Retail, 2012*

- While supermarkets/hypermarkets have increased their share of the sweet and savoury snack market since 2007, grocery retailers overall have seen a slight decrease, largely attributable to discounters and small grocery retailers (Euromonitor International, 2012).

- France's grocery retail sector is highly concentrated, with the top five companies accounting for more than half (52.7%) of the market in 2011. These retailers are expected to remain the market leaders in 2012, with their combined market share growing slightly to reach 53.4%. The top five retailers held a combined 17,064 outlets in 2011, and are forecast to reach 17,418 outlets in 2012.

- The changing shopping habits of consumers due to price sensitivity are also impacting the grocery sector, leading to growth in the discount channel, as well as the use of price promotions and economy product ranges by hypermarkets (Planet Retail, 2012).

Top Grocery Retailers in France, 2011

Company	Number Of Outlets	Total Grocery Market Share %
Carrefour	4,660	15.2
Leclerc	634	11.0
ITM (Intermarché)	2,122	10.1
Casino	8,225	8.6
Système U	1,423	7.8

Source: *Planet Retail, 2012*

PRODUCT EXTENSIONS AND INNOVATIONS

- Health-conscious consumers, who want to feel they are choosing healthier products while still indulging in their favourite snacks, are encouraging manufacturers to be innovative. A focus on natural and healthy ingredients/products is increasingly becoming a successful strategy for snack manufacturers. For example, Intersnack France launched Curlettes (flavoured corn chips) with a healthier recipe in 2010, while Sauces et Créations launched a new range of healthier products (TooGood Crispo) targeting women. Future growth for chips/crisps is expected to be driven by new flavours and these healthier product innovations. (Euromonitor International, 2012).

Source: *Planet Retail, 2012*

- According to Mintel, 473 new snack products were introduced to the French market from August 2011 to August 2012. Claims were a prominent aspect of these products, with 569 claims made. A variety of flavour types were also present amongst the new products, with the most common type of flavour used being fruit and vegetable (56 products). Herb and spice flavours accounted for 42 products, followed by 30 products classified as having a sweet flavour, and 21 products as savoury (such as barbecue, roasted and mustard flavours). Strong activity also occurred among private label launches, as the two companies with the most product launch activity were both private label producers.

Top Five Companies for New Snack Launches August 2011 to August 2012

Company	Number of Snack Products
Monoprix	30
Système U	29
Intersnack	28
Picard	23
PepsiCo	22

Source: *Mintel, 2012*

Monoprix

- The company Monoprix introduced the most new snack products from August 2011 to August 2012, which were all private label products and covered a range of snack sub-categories. Nuts was the sub-category with the most new products (six), which included: organic, smoked, and salted almonds; salted roasted pistachios; grilled, salted peanuts; and cashew nuts.

- Monoprix also introduced six snack/cereal/energy bars and five corn-based snack products. New snack/cereal/energy bar products had a common health theme, containing fruit ingredients or whole wheat, while corn-based snacks included tortilla chips, crisps and puffed corn products, two of which were peanut flavoured.

Système U

- Système U had the second-most product launches, all of which were also private label. The most active snack categories for this company were nuts and potato snacks, each with six product launches, followed by snack mixes with four new launches. Organic and ethical claims, such as environmentally friendly packaging/product, were common in products such as nuts and snack mixes, while potato snacks also had some health-related claims, such as low/no/reduced fat and no additives/preservatives.

Intersnack

- The company Intersnack had the third-most snack launch activity from August 2011 to August 2012, with 28 new products. Potato snacks represented the most launches for Intersnack by far (17), while nuts accounted for seven launches. A number of claims were used in new potato products, particularly no additives/preservatives, ease of use, and convenient packaging. Other health-related claims were also used, as well as an ethical claim and one demographic claim for children (5-12) (Mintel, 2012).

PRODUCT EXTENSIONS AND INNOVATIONS (continued)

- *No additives/preservatives* was the most common claim used in snacks launched from August 2011 to August 2012, followed by *organic* and *microwaveable*. Convenience was the main trend seen in the top 10 claims for new snack products, which included: *microwaveable*, *convenient packaging*, *ease of use*, and *time/speed*, which were used a total of 111 times. Health-related claims were present with regard to no *additives/ preservatives* and *organic*, while ethical claims of *environmentally friendly products* and *environmentally friendly packaging* were used a combined 51 times. *Vegetarian* claims were used on 24 products, while an *economy* claim was made for 17 products.

- With regard to the specific flavour of a product, unflavoured/ plain was the most common flavouring among new snack products, but was followed closely by salt/salted. Chocolate was also a popular flavour among new snack products.

- While not a traditional salty snack flavour, lemon is increasingly being used globally as a flavour for salty snacks, which may also impact flavour trends in France's snack market. Lemon is being used both as a flavour on its own, and blended with other ingredients to flavour salty snack products such as potato chips/ crisps, popcorn and nuts. Examples of lemon blends include lemon and onion, lemon and pepper/spice, or lemon and chili (Mintel, 2012).

Top Five Claims
August 2011 to August 2012

Claim	Number of Snack Products
No additives/ preservatives	103
Organic	70
Microwaveable	52
Convenient packaging	28
Ethical - environmentally friendly package	28

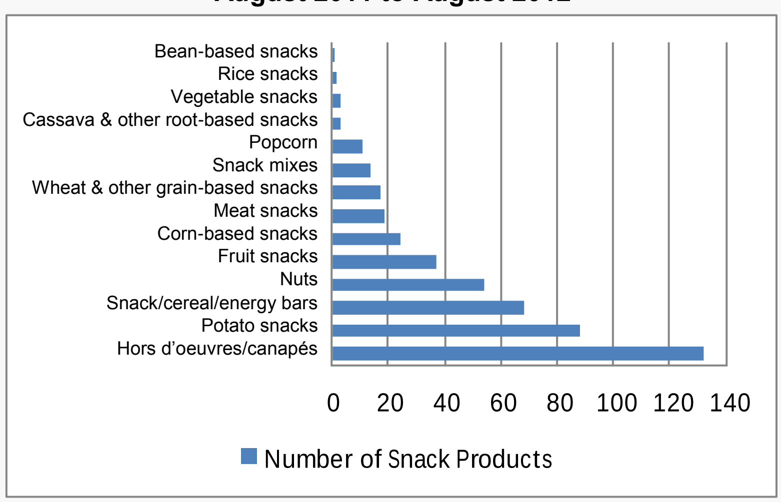
Top Five Flavours
August 2011 to August 2012

Flavour	Number of Snack Products
Unflavoured/plain	48
Salt/salted	45
Chocolate	27
Roasted	19
Hazelnut	12

- Mintel suggests the following ideas for new salty snack product development: experimenting with citrus flavours such as lemon, orange and yuzu; looking to flavour combinations from other food categories that can also be used in salty snacks (such as sauces and dressings); and giving products personality through different cuisine associations, such as lemon- and Mediterranean-flavoured chips (2012).

- Hors d'oeuvres/canapés have accounted for the most new snack products in France over the past five years (2008 to 2012). Potato snacks have consistently accounted for the second-most new snack products since 2008.

Type of Snack Products Launched in France by Category
August 2011 to August 2012



Source for all: *Mintel, 2012*

Source: *Mintel, 2012*

- One particularly innovative product highlighted by Mintel was *Croc légumes,* launched in January 2011. These are crispy wafers made with 50% vegetables that are rich in fibre, and come in beetroot and shallot, and carrot and cumin varieties (Mintel, 2012).

NEW PRODUCT EXAMPLES

According to a January 2012 survey by Mintel, raw vegetable snacks are predicted to move toward the mainstream consumer market. The share of raw snacks has been increasing globally within total snack launches, moving from a 0.8% share in 2008 to a 2.2% share in 2012. Raw positioning/formulations in new snacks from 2010 to 2012 were present among a variety of categories, the most popular being nuts, followed by vegetable snacks and snack/cereal/energy bars (Mintel, 2012). In France, many new box formats are also appearing in the snack market, such as a snack-cocktail kit that includes a spreadable sauce in five new recipes, 12 pieces of toast, and a spoon and knife. The product has original recipes prepared by a chef, and packaging that is unique and sophisticated (Euromonitor International, 2012). Below are further examples of new snack products launched in France, between August 2011 and August 2012, from Mintel's Global New Products Database.

Exotic Fruit Snack Mix

Exotic Fruit Snack Mix (Biothémis Mélange Exotique) is claimed to be made with fruits specially selected for their flavour, and for the social, human, and environmental dimensions of the organic programs they come from. The organic-certified product is made with 40% fair trade ingredients, from the controlled Turkish grape network. It retails in a 150 g pack for US$3.98. Also available is: Cranberries from the Saint-Laurent Plains in Quebec (Canneberges des Plaines de Saint-Laurent au Québec).

Lemon and Pepper Flavoured Chips

Vico La Chips de L'Apéritif! Lemon and Pepper Flavoured Chips (Chips de Pomme de Terre Saveur Citron et Poivre) have been reformulated to be thicker and crunchier. The product has also been repackaged and is now available in a 250 g family format pack for US$2.63. It is produced using 100% sunflower oil and contains no colourings or preservatives.

Smoked Salmon Tartars with Tzatziki

New under the Robert Delmas brand are Smoked Salmon Tartars with Tzatziki (Tartares de Saumon Fumé au Tzatziki). The product retails in a 160 g pack containing two 80 g tubs for US$6.26.

Pesto Flavour Cheese Aperitif Snacks

Pesto Flavour Cheese Aperitif Snacks (Apérivrais Pesto) are topped with chives, seeds, shallot and tarragon. This product is free from preservatives and retails in a limited edition 100 g pack, including 20 units and four cocktail sticks for US$2.57.

Peanuts with Mediterranean Herbs

Bénenuts Peanuts with Mediterranean Herbs (Cacahuètes aux Herbes Méditerranéennes) are crunchy and flavoured with a carefully measured mix of herbs such as basil, thyme and rosemary. The product is a source of protein, is rich in fibre and retails in a 110 g pack for US$2.17.

NEW PRODUCT EXAMPLES: PRIVATE LABEL

Private label products account for a notable share of France's sweet and savoury snack market, and are supported by consumer price-sensitivity. With lower pricing, private label products allow consumers to still purchase quality and premium snack products, but at a lower price point. Private label products also represented a notable portion of all new snacks launched from August 2011 to August 2012. Several of these are highlighted below.

Antipasti Seasoned Vegetable Assortment

Casino Antipasti Seasoned Vegetable Assortment (Assortiment de Légumes Assaisonnés) contains artichokes, semi-dried tomatoes, black olives and 2% olive oil. The microwaveable product can be served as an aperitif, as a starter or as a main meal with fresh tagliatelle pasta. The assortment retails in a 300 g pack for US$6.52.

Private label: Casino

Tuna, Walnut and Sausage Slices

Odyssee Selection Tuna, Walnut and Sausage Slices (Saucisson de Thon aux Noix) are rich in omega-3 and free from preservatives. They are said to be tasty, not fatty and retail in an 80 g pack for US$3.30. Also available is Chorizo-Style Salmon (Saumon Façon Chorizo).

Private label: Odyssee Selection

Paprika Flavoured Crisps

Monoprix Paprika Flavoured Crisps (Tuiles Goût Paprika) have been repackaged in a newly designed 170 g size. This product contains approximately eight portions and retails for US$2.00.

Private label: Monoprix

Salted and Spicy Roasted Pepitas Crunchy Nuts

Alesto Salted and Spicy Roasted Pepitas Crunchy Nuts (Noten Pepitamix Mix Fruits a Coque Pepita) are a mix of peanuts, almonds and pumpkin seeds. The product retails in a 250 g re-sealable pouch for US$2.16.

Private label: Alesto

Aperitif Flowers

Picard l'Apéritif's 12 Aperitif Flowers (Petites Fleurs Apéritives) include an assortment of flower-shaped canapés with the following flavours: Serrano Ham with Roquette and Parmesan; Tomato, Strawberry and Basil; Tajine-Style Chicken; and Goat's Cheese with Beetroot. The product retails in a 90 g pack for US$8.59.

Private label: Picard l'Apéritif

NEW PRODUCT EXAMPLES: CLAIMS

Claims were very present on new snack launches, used to differentiate products and target consumer trends regarding health, convenience and the environment: some examples are below.

Organic Blueberry Chips

Au'some Pépites Organic Blueberry Chips (Pépites à la Myrtille) are made from 100% organic fruits. This product is apple- and pear-based and is free from added sugars, sweeteners, preservatives, colourings and artificial flavourings. The product retails in a 30 g re-sealable pack for US$2.09. Also available in the range are Organic Strawberry Chips (Pépites à la Fraise).

Claims: Convenient packaging; low/no/reduced sugar; no additives/preservatives; organic.

Tapas Assortment

Espuña Tapas Assortment (Tapas Al Minuto Assortiment) is a gluten-free Spanish product consisting of six chorizo sausages, four frankfurters with bacon, two mini brochettes with paprika and two mini brochettes with fine herbs. Each variety is packaged in an individual tray that can be placed directly in the microwave and is ready to serve in just half a minute. It can also be grilled or pan-heated. It retails in a 160 g pack for US$3.66.

Claims: Ease of use; gluten-free; low/no/reduced allergen; microwaveable; time/speed.

Organic Red Berry & Oat Bran Cereal Bars

Karéléa Ligne Control Organic Red Berry and Oat Bran Cereal Bars (Céréales et Son d'Avoine Saveur Fruits Rouges) are said to be rich in fibre, a source of protein, and low in fat. The product is suitable for vegetarians, contains no colourants or artificial flavourings, and is said to help the functioning of the digestive system and care for the silhouette. It retails in a 150 g pack containing 6 x 25 g bars for US$4.32.

Claims: Digestive (functional); high/added fibre; low/no/reduced fat; organic; slimming; no additives/preservatives; vegetarian.

Irresistible Organic Crisps

Family Irresistible Organic Crisps (Chips Bio Irrésistibles) are naturally gluten-free. This organic product retails in a 125 g pack for US$2.49.

Claims: Gluten-free, low/no/reduced allergen, organic.

Organic Aperitif Snack Mix

Céréal Bio Organic Aperitif Snack Mix (Graines Apéri'Bio Graines de Soja Grillés, Raisins Secs et Amandes) contains a mixture of grilled soya beans, raisins and grilled almonds and is free from preservatives and colourings. It is said to provide a tasty, light snack and to be just as crunchy as a mix that includes peanuts, while containing 36% less saturated fatty acids. This product retails in a 70 g sachet made of a thinner plastic material to reduce the impact on the environment, for US$2.25.

Claims: Ethical - environmentally friendly package; low/no/reduced saturated fat; organic; no additives/preservatives.

Source for all (pages 10-12): *Mintel, 2012*

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