



MARKET ACCESS SECRETARIAT  
Global Analysis Report

# Confectionery Products

## in Japan

September 2015



### EXECUTIVE SUMMARY

- With sales of just under US\$7.8 billion in 2014, Japan is currently the eighth-largest confectionery market in the world. However, per capita sales are significantly lower than in many western markets, as consumers still tend to prefer the bakery category when it comes to sweet snacks.
- Confectionery value sales are expected to grow over the 2015 to 2019 forecast period, reaching US\$8.0 billion, while volume sales will actually contract slightly. This is largely attributable to manufacturers implementing smaller pack sizes rather than increasing prices, as an attempt to mask rising input costs.
- All five of the top global confectionery companies do business in Japan; however, Japan represents a marginal proportion of their overall sales.
- Chocolate confectionery\* is the top category in Japan, with 44% of total sales in value terms in 2014, followed closely by sugar confectionery (39%). Gum remains a small market by comparison, holding just 17% of total confectionery sales.
- Premium chocolate is finding favour among consumers eager to capitalize on the health benefits to be found in cocoa. Boxed chocolate assortments are also hugely popular, due to their practicality for gift-giving and celebratory occasions. Pastilles, gums, jellies and chews are gaining ground as they are seen as a quick and easy way to satisfy a sweet tooth, while mints are also seeing sales growth, but mainly at the expense of gum.
- As Japanese consumers become increasingly discerning of product and ingredient attributes, manufacturers of innovative confectionery products that are healthful, beneficial and at the premium end of the spectrum may be best suited to find success.

*\*Note: For detailed definitions of the confectionery categories analyzed in this report, please see the Annex on page 10.*

### CONTENTS

Executive Summary .....1

Positioning Confectionery Products in the World.....2

Consumer Attitudes and Economic Drivers .....3

Retail Environment.....3

Chocolate Confectionery .....4

Sugar Confectionery .....6

Gum.....7

Conclusion.....9

For More Information.....9

Resources .....9

Annex – Definitions .....10



Visit our online library of public reports for more information on this and other markets.



## POSITIONING CONFECTIONERY PRODUCTS IN THE WORLD

### Top 5 Confectionery Companies Worldwide in 2014, US\$ Millions

Company	International Confectionery Sales	Confectionery Sales in Japan	Japan as % of World Sales
Mondelez International Inc.	27,804.3	475.2	1.7%
Mars Inc.	27,103.8	39.0	0.1%
Nestlé SA	15,607.8	176.1	1.1%
Ferrero Group	9,925.7	10.3	0.1%
The Hershey Co.	9,530.5	14.3	0.2%

Source: Euromonitor, 2015-c

### Top 10 Confectionery Markets Worldwide in 2014, US\$ Millions

Country	Retail Sales
United States	31,790.1
China	15,198.7
United Kingdom	14,056.1
Russia	13,393.5
Germany	12,893.2
Brazil	10,866.8
France	8,447.4
<b>Japan</b>	<b>7,795.0</b>
Italy	5,384.1
Mexico	4,763.9

Source: Global Trade Atlas, 2015

### The Confectionery\* Market in Japan at a Glance, US\$

Indicator	Value
Retail sales, 2014	\$7,795.0 million
Imports of confectionery* from the world, 2014	\$753.5 million
Exports of confectionery* to the world, 2014	\$145.6 million
Dependence on imports	9.1%

Source: Euromonitor, 2015-c; Global Trade Atlas, 2015

### Top 10 Importers of Confectionery\* Worldwide 2013, US\$

Country	Imports US\$ billions	Top Suppliers & Market Share						Canada's Share
		1		2		3		
United States	3.69	Canada	40.8%	Mexico	26.0%	Germany	5.9%	40.8%
Germany	2.79	Belgium	21.5%	Netherlands	5.5%	Switzerland	13.0%	0.04%
United Kingdom	2.55	Germany	22.2%	Belgium	13.5%	Poland	13.1%	0.02%
France	2.32	Belgium	28.8%	Germany	23.9%	Italy	11.2%	0.03%
Canada	1.29	United States	60.7%	Belgium	5.7%	Germany	4.9%	N/A
Netherlands	1.23	Belgium	32.2%	Germany	22.9%	France	12.9%	0.26%
Belgium	1.05	Netherlands	30.2%	Germany	24.9%	France	16.2%	0.02%
Russia	0.95	Ukraine	38.3%	Germany	14.3%	Italy	8.5%	0.10%
Spain	0.78	France	27.7%	Germany	23.8%	Italy	14.0%	0.01%
Italy	0.77	Germany	38.3%	France	14.7%	Belgium	11.4%	0.04%
<b>(12) Japan</b>	<b>0.71</b>	<b>Singapore</b>	<b>25.9%</b>	<b>Belgium</b>	<b>11.6%</b>	<b>United States</b>	<b>10.5%</b>	<b>1.06%</b>

Source: Global Trade Atlas, 2015 \*Note: For the purposes of the trade data in this report, "confectionery" was defined by the HS codes 1704 and 1806. At the time of writing, 2014 data was not available for all countries, so 2013 was used for a consistent comparison.



---

## CONSUMER ATTITUDES AND ECONOMIC DRIVERS

Japan is the eighth-largest confectionery market in the world in terms of overall value sales, but falls to a rank of 35<sup>th</sup> in terms of value sales per capita. Known to be particularly food-conscious with a preference for fresh items, Japanese consumers tend to reach for products from the baked goods sector for their sweet fix, rather than confectionery. Sales of sweet biscuits, ice cream, cakes and pastries each surpassed chocolate confectionery and sugar confectionery by a significant margin in 2014 according to Euromonitor data (2015-e). However, confectionery products do hold some favour with Japanese consumers, particularly those that offer convenience in terms of portability and share-ability, ease of consumption, and specific benefits. About 50% of Japanese consumers who choose chocolate or sugar confectionery products as a snack, do so for an afternoon pick-me-up between lunch and dinner (Datamonitor, 2014). So products that offer to boost alertness or energy are popular picks, especially among young adult consumers, as are items that offer advantages like whitening teeth and freshening breath (Euromonitor, 2015-b, 2015-d).

Demographic factors are also at play in this market, with an aging population and declining rates of regeneration resulting in a shrinking consumer base for confectionery products. According to Euromonitor, the proportion of residents aged 65 and over, who are generally marginal confectionery consumers, has been steadily rising, to an estimated 26% of the total population in 2014. As well, childhood obesity is becoming a concern, with the Japanese Ministry of Education, Culture, Sports, Science and Technology noting that obesity among children aged 9-17 years has been on the rise over the last three decades, due largely to changes in diet (Euromonitor, 2015-d). With a growing emphasis on health and the tailoring of products for senior consumers, this environment presents opportunities for products whose benefits are well-marketed, innovative, or developed with premium ingredients.

## RETAIL ENVIRONMENT

Overall, the confectionery market in Japan contracted slightly from 2010 to 2014, landing at sales of US\$7.8 billion or 328,000 tonnes. This decline was largely attributable to shrinking sales in the gum subcategory, which is falling out of favour with younger consumers. Chocolate confectionery remains the top subcategory, representing 44% of total confectionery sales, and was the best performer over the period, even with just marginal growth in both value and volume terms.

Over the forecast period of 2015 to 2019, confectionery sales are expected to rally somewhat in value terms. Slow but upward growth will see sales return to just over US\$8.0 billion in 2019, representing the first year of true growth over the 2010 market value. However, volume sales are anticipated to continue falling, likely due to smaller pack sizes. According to Euromonitor, in an effort to shield consumers from rising ingredient costs, many manufacturers are launching smaller product packages rather than raising prices.



### Historic Retail Sales of Confectionery in Japan and Period Growth (%)

Category	2010	2011	2012	2013	2014	% CAGR* 2010-14
<b>Value Sales in US\$ Millions (current prices, fixed 2014 exchange rate)</b>						
Confectionery	8,007.3	7,970.6	7,852.8	7,767.4	7,795.0	-0.7
Chocolate confectionery	3,346.5	3,344.4	3,342.6	3,402.2	3,461.9	0.9
Sugar confectionery	2,975.1	3,013.1	2,995.8	2,984.8	3,015.6	0.3
Gum	1,685.7	1,613.1	1,514.4	1,380.4	1,317.4	-6.0
<b>Volume Sales in '000 Tonnes</b>						
Confectionery	334.4	335.2	332.8	331.4	327.9	-0.5
Chocolate confectionery	135.9	136.4	136.6	140.3	140.2	0.8
Sugar confectionery	153.3	155.4	155.7	154.4	153.5	<0.1
Gum	45.2	43.4	40.5	36.6	34.2	-6.7

Source: Euromonitor, 2015-c

\*CAGR: Compound Annual Growth Rate.

### Forecast Retail Sales of Confectionery in Japan and Period Growth (%)

Category	2015	2016	2017	2018	2019	% CAGR* 2015-19
<b>Value Sales in US\$ Millions (current prices, fixed 2014 exchange rate)</b>						
Confectionery	7,903.5	7,932.5	7,965.6	7,995.1	8,049.7	0.5
Chocolate confectionery	3,539.2	3,568.3	3,598.0	3,618.1	3,650.9	0.8
Sugar confectionery	3,081.5	3,106.8	3,124.3	3,140.5	3,162.1	0.6
Gum	1,282.8	1,257.4	1,243.2	1,236.5	1,236.8	-0.9
<b>Volume Sales in '000 Tonnes</b>						
Confectionery	325.8	324.3	323.3	322.5	321.8	-0.3
Chocolate confectionery	139.9	139.5	139.3	139.0	138.8	-0.2
Sugar confectionery	153.3	153.2	153.2	153.1	153.0	-0.1
Gum	32.6	31.6	30.9	30.4	30.0	-2.1

Source: Euromonitor, 2015-c

\*CAGR: Compound Annual Growth Rate.

As shown in the table below, the confectionery market in Japan is dominated by the Lotte Group and Meiji Holdings, who currently hold 18% and 13% of the market, respectively. The top five confectionery companies represent a combined share of almost 49%, followed by numerous smaller entities, including a large number of companies with less than 1% of the market. Private label represents just 0.8% of the Japanese confectionery market, a proportion that has remained consistent over the last five years.

### Top Five Confectionery Companies in Japan - % Breakdown Based on Retail Value Sales

Company	2010	2011	2012	2013	2014	PP* Change 2010-14
Lotte Group	18.9	18.2	18.2	18.2	17.8	-1.1
Meiji Holdings Co. Ltd.	12.7	12.5	12.6	12.9	12.9	0.2
Morinaga & Co. Ltd.	8.1	8.0	7.9	7.9	7.8	-0.3
Mondelez International Inc.	-	-	6.0	6.1	6.1	6.1
Asahi Group Holdings Ltd.	-	3.5	3.6	4.0	4.1	4.1

Source: Euromonitor, 2015-c

\*PP: Percentage point



## CHOCOLATE CONFECTIONERY

Chocolate confectionery is the largest confectionery subsector in Japan and was the best performing over the 2010 to 2014 review period, with a CAGR of 0.9% to reach sales of just under US\$3.46 billion in 2014. Following the promotion of cocoa's potential health benefits in popular television programs in 2013, Japanese consumers have become increasingly interested in high-quality chocolate products, particularly those with pure ingredients, which generally carry a higher price tag (Euromonitor, 2015-a). Despite the anticipated gains at the higher end of the market due to this burgeoning trend, overall sales for the category are expected to decline slightly over the forecast period with a CAGR of -0.2%, to reach US\$3.45 billion by 2019.

In value terms, the most prominent segment within chocolate confectionery is boxed assortments, with sales of just under US\$1.2 billion in 2014. However, the seasonal chocolate category has been the best performer since 2010, and is expected to remain so through 2019. According to Euromonitor, seasonal chocolates are typically sold at a higher price point than other types, and premium variations marketed in support of special events and celebratory occasions are popular gift items (2015-a). Due to this growth, exporters interested in the seasonal category will face fierce competition, as an increasing number of well-known chocolate companies from Europe and around the world are vying for share in this lucrative market.

### Historic Retail Value Sales of Chocolate Confectionery in Japan by Segment, US\$ Millions, Current Prices – Fixed 2014 Exchange Rate

Category	2010	2011	2012	2013	2014	% CAGR* 2010-14
Chocolate confectionery	3,346.5	3,344.4	3,342.6	3,402.2	3,462.0	0.9
Boxed assortments	1,151.0	1,165.8	1,173.2	1,177.1	1,184.6	0.7
Seasonal chocolate	636.6	627.1	652.1	677.0	704.1	2.6
Tablets	602.5	608.6	588.5	603.8	615.7	0.5
Bagged self/softlines	559.6	563.7	560.4	570.6	578.4	0.8
Countlines	276.2	273.5	277.2	285.0	292.7	1.5
Chocolate with toys	101.0	86.4	71.9	69.9	68.3	-9.3
Other chocolate confectionery	19.6	19.5	19.4	18.8	18.3	-1.7

Source: Euromonitor, 2015-a

\*CAGR: Compound Annual Growth Rate.

### Forecast Retail Value Sales of Chocolate Confectionery in Japan by Segment, US\$ Millions, Current Prices – Fixed 2014 Exchange Rate

Category	2015	2016	2017	2018	2019	% CAGR* 2015-19
Chocolate confectionery	3,482.2	3,475.7	3,470.0	3,455.0	3,451.7	-0.2
Boxed assortments	1,182.0	1,173.6	1,168.8	1,158.5	1,156.8	-0.5
Seasonal chocolate	715.0	722.6	728.7	733.2	736.6	0.7
Tablets	622.0	618.7	614.9	609.0	604.5	-0.7
Bagged self/softlines	582.2	580.0	578.2	575.8	575.4	-0.3
Countlines	296.7	299.0	299.8	300.1	301.7	0.4
Chocolate with toys	66.4	64.0	62.3	61.0	59.6	-2.7
Other chocolate confectionery	17.9	17.6	17.4	17.2	17.0	-1.2

Source: Euromonitor, 2015-a

\*CAGR: Compound Annual Growth Rate.



The chocolate confectionery market is dominated by five key players, with Meiji Holdings representing the largest share (19%) in 2014. The company has a broad product range, and effectively markets to the preferences of consumers ranging from young (convenient shareable items) to elderly (premium, high-quality fare). Manufacturers have had to find innovative ways to keep consumers interested in their products, particularly after having to implement price increases or shrunken pack sizes due to rising input costs. As one example, in 2014 Nestlé opened an entire retail store in Tokyo dedicated to Kit Kat, its core Japanese brand, and this “chocolatery” has found much success among consumers (Euromonitor, 2015-a; 2014).

**Top Five Chocolate Confectionery Companies in Japan  
– % Breakdown based on Retail Value Sales**

Company	2010	2011	2012	2013	2014	PP* Change 2010-14
Meiji Holdings Co. Ltd.	18.5	18.6	18.6	18.8	18.8	0.3
Lotte Group	15.1	14.7	14.6	14.6	14.6	-0.5
Morinaga & Co. Ltd.	12.5	12.1	11.9	11.1	10.5	-2.0
Fujiya Co. Ltd.	5.2	5.3	5.4	5.4	5.3	0.1
Nestlé SA	4.7	4.7	4.9	5.0	5.1	0.4

*Source: Euromonitor, 2015-a*

*\*PP: Percentage point*

## SUGAR CONFECTIONERY

Sugar confectionery is the second-largest category within the Japanese confectionery market, with sales of US\$3.0 billion in 2014. Sales have been posting slow but positive growth, with a CAGR of 0.3% from 2010 to 2014. However, they are expected to decline by the same rate over the 2015 to 2019 forecast period, retracting to US\$2.9 billion.

Pastilles, gums, jellies and chews represents the highest-grossing segment within sugar confectionery, and is expected to be the strongest performer over the years leading to 2019, with a CAGR of 0.7%. According to Euromonitor, this type of confectionery holds a strong position in the market, and is particularly popular with younger generations. Due to their ability to be consumed or shared quickly and easily, pastilles, gums, jellies and chews are slowly absorbing share from the boiled sweets segment (2015-d). However, mints has been the best performing segment since 2010 and is forecast to continue their upward momentum through to 2019, although at a slower pace. This growth will largely be attributed to the popularity of power mints, or stronger-flavoured mints with purported benefits, such as breath-freshening or increasing alertness. Japanese consumers appreciate that mints with these properties can take effect almost immediately after a single use. This instant gratification combined with their convenience and ability to be consumed subtly, has resulted in mints becoming a common preference to gum (Euromonitor, 2015-d).



**Historic Retail Value Sales of Sugar Confectionery in Japan by Segment,  
US\$ Millions, Current Prices – Fixed 2014 Exchange Rate**

Category	2010	2011	2012	2013	2014	% CAGR* 2010-14
Sugar confectionery	2,975.1	3,013.1	2,995.8	2,984.8	3,015.6	0.3
Pastilles, gums, jellies, and chews	748.4	770.9	785.6	793.3	817.4	2.2
Medicated confectionery	741.1	761.1	738.4	722.4	721.0	-0.7
Mints	425.6	429.3	436.2	469.5	482.6	3.2
Boiled sweets	461.3	466.0	460.1	446.0	443.3	-1.0
Toffees, caramels and nougats	462.2	453.9	444.8	438.1	435.7	-1.5
Lollipops	33.5	31.4	29.2	28.1	27.7	-4.7
Other sugar confectionery	103.0	100.7	101.5	87.5	88.0	-3.8

Source: Euromonitor, 2015-d

\*CAGR: Compound Annual Growth Rate.

**Forecast Retail Value Sales of Sugar Confectionery in Japan by Segment,  
US\$ Millions, Current Prices – Fixed 2014 Exchange Rate**

Category	2015	2016	2017	2018	2019	% CAGR* 2015-19
Sugar confectionery	3,031.8	3,026.1	3,013.2	2,998.9	2,989.7	-0.3
Pastilles, gums, jellies, and chews	832.5	841.5	846.6	850.9	856.3	0.7
Medicated confectionery	719.7	715.2	710.2	706.7	700.9	-0.7
Mints	489.7	491.9	492.6	492.3	492.5	0.1
Boiled sweets	440.9	433.3	425.1	415.4	409.3	-1.8
Toffees, caramels and nougats	434.2	430.3	425.5	421.3	419.2	-0.9
Lollipops	27.1	26.7	26.4	26.2	26.0	-1.0
Other sugar confectionery	87.8	87.2	86.7	86.0	85.5	-0.6

Source: Euromonitor, 2015-d

\*CAGR: Compound Annual Growth Rate.

As shown in the table on the following page, Asahi Group Holdings is the most prominent company within the Japanese sugar confectionery market, largely due to Mintia, the leading brand in sugar confectionery. Asahi Group has found success by marketing Mintia products to younger consumers, promoting their sweet, fruity and interesting flavour variations, and in using celebrity endorsements (Euromonitor, 2015-d). The other top companies each hold less than 10% of the market, making for a fairly fragmented environment. Due to the low unit cost of sugar confectionery items overall, consumers tend to prefer familiar branded products over private label, which holds a negligible presence in sugar confectionery.





**Top Five Sugar Confectionery Companies in Japan  
– % Breakdown based on Retail Value Sales**

Company	2010	2011	2012	2013	2014	PP* Change 2010-14
Asahi Group Holdings Ltd.	-	9.2	9.5	10.5	10.7	10.7
Morinaga & Co. Ltd.	7.7	7.6	7.6	7.9	8.0	0.3
Meiji Holdings Co. Ltd.	7.7	7.2	7.5	7.6	7.6	-0.1
Mikakuto Co. Ltd.	7.9	7.7	7.7	7.7	7.5	-0.4
Kanro Co. Ltd.	7.5	7.5	7.4	6.8	6.7	-0.8

Source: Euromonitor, 2015-d

\*PP: Percentage point

## GUM

Gum is the smallest category within confectionery, with value sales of US\$1.3 billion in 2014, or 17% of the total market. While chocolate and sugar confectionery have seen marginal value growth, gum sales have fallen fairly significantly in recent years, with a CAGR of -6.0%. According to Euromonitor, while chewing gum can offer benefits such as brain stimulation and helping in concentration, many Japanese consumers perceive this practice to be impolite, particularly in formal settings like school or the workplace (2015-b). As a result, many shoppers are turning to other confectionery products for these properties.

While sales in the gum category are expected to continue falling over the forecast period of 2015 to 2019, the decline will be at a somewhat reduced rate. Japanese regulations regarding the use of health claims on health and wellness products (of which sugar-free gum is a part) were loosened slightly in 2013, and are expected to come into effect in spring 2015. While previously, products had to be certified as Food for Specified Health Uses (FOSHU) in order to bear health-related claims, the new regulations would allow products to do so, as long as ingredient effectiveness could be scientifically proven. This development is expected to enable gum producers to better market and capitalize from the added benefits of their products (Euromonitor, 2015-b).

**Historic Retail Value Sales of Gum in Japan by Segment,  
US\$ Millions, Current Prices – Fixed 2014 Exchange Rate**

Category	2010	2011	2012	2013	2014	% CAGR* 2010-14
Gum	1,685.7	1,613.1	1,514.5	1,380.4	1,317.4	-6.0
Sugar free chewing gum	1,248.3	1,211.0	1,143.2	1,075.2	1,031.3	-4.7
Sugarized chewing gum	368.5	335.6	308.8	253.9	237.3	-10.4
Bubble gum	69.0	66.5	62.5	51.3	48.9	-8.2

Source: Euromonitor, 2015-b

\*CAGR: Compound Annual Growth Rate.

**Forecast Retail Value Sales of Gum in Japan by Segment,  
US\$ Millions, Current Prices – Fixed 2014 Exchange Rate**

Category	2015	2016	2017	2018	2019	% CAGR* 2015-19
Gum	1,262.1	1,224.8	1,199.0	1,180.7	1,169.3	-1.9
Sugar free chewing gum	994.6	972.9	959.7	951.2	947.1	-1.2
Sugarized chewing gum	222.0	210.2	200.6	193.1	187.8	-4.1
Bubble gum	45.5	41.7	38.8	36.4	34.5	-6.7

Source: Euromonitor, 2015-b

\*CAGR: Compound Annual Growth Rate.





Lotte Co. is the dominant gum player in Japan, with a 54% value share in 2014, largely due to its Xylitol brand, which solely represented 24% of the gum market in the same year. Xylitol is the only gum in Japan that is accredited by the Japan Dental Association, and has a wide product range in terms of flavour and package format for consumers to choose from. Mondelez International is the second-largest company within the gum category, registering a 25% share in 2014. Mondelez owns Clorets, the second highest-grossing gum brand in Japan, and also launched the very first gum containing caffeine in 2014, following extensive research on functions consumers would look for in a gum product (Euromonitor, 2015-b).

**Top Five Gum Companies in Japan**  
**– % Breakdown based on Retail Value Sales**

Company	2010	2011	2012	2013	2014	PP* Change 2010-14
Lotte Group	49.1	49.3	51.2	53.9	54.0	4.9
Mondelez International Inc.	-	-	21.8	23.7	24.9	24.9
Meiji Holdings Co. Ltd.	10.2	9.9	9.3	9.7	9.3	-0.9
Ezaki Glico Co. Ltd.	3.3	3.3	3.3	3.5	3.6	0.3
Marukawa Confectionery Co. Ltd.	1.2	1.2	1.3	1.3	1.3	0.1

*Source: Euromonitor, 2015-b*

*\*PP: Percentage point*

## CONCLUSION

Due to its sheer size, Japan’s confectionery market is significant on an international scale; however, per capita consumption remains lower than in most western markets. Japanese consumers still tend to prefer bakery products over chocolate or sugar confectionery when in need of a sweet fix, and overall sales have been shrinking in recent years due to a declining population size. The market is expected to post marginal but positive value growth over the forecast period, but consumers are increasingly discerning with regard to product attributes. Manufacturers may find opportunities through innovative confectionery products, particularly at the premium end of the market, that are made with high-quality ingredients or emphasize specific and tangible benefits for consumers.

## FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in Japan**  
[www.tradecommissioner.gc.ca/eng/offices-japan.jsp](http://www.tradecommissioner.gc.ca/eng/offices-japan.jsp)
- **Find a Trade Commissioner**  
[www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp](http://www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp)

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found under *Statistics and Market Information* at the following link, arranged by sector and region of interest:

- [ats-sea.agr.gc.ca](http://ats-sea.agr.gc.ca)



For additional information on FOODEX 2015, please contact:

- **Ben Berry, Deputy Director**  
Trade Show Strategy and Delivery  
Agriculture and Agri-Food Canada  
[ben.berry@agr.gc.ca](mailto:ben.berry@agr.gc.ca)

## RESOURCES

- Datamonitor (2014). *Consumer Survey Data – October 2014 – Food and Drink*.
- Euromonitor International (2015-a). *Chocolate Confectionery in Japan*.
- Euromonitor International (2015-b). *Gum in Japan*.
- Euromonitor International (2015-c). Packaged food data.
- Euromonitor International (2015-d). *Sugar Confectionery in Japan*.
- Euromonitor International (2015-e). *Sweet Snack Preferences Across the World (Datagraphic)*.
- Euromonitor International (2014). *Passport – Global Confectionery Overview: Key Categories, Countries and Trends to 2019*.
- Global Trade Atlas (2015).

## ANNEX – DEFINITIONS

The following are the detailed definitions employed by Euromonitor for each confectionery category.

### Chocolate Confectionery

- **Bagged Selflines/Softlines:** These bagged products are either chocolate- or sugar-coated with a solid, liquid or soft centre. Soft candies with a chocolate centre and chocolate-coated candies are also included. Chocolate eggs are excluded.
- **Boxed Assortments:** This is the aggregation of standard boxed assortments (whether budget or premium, including assortments in jars and tins) and twist-wrapped miniatures (boxed chocolates derived from an existing brand whose format has been miniaturized and is typically individually twist-wrapped).
- **Chocolate with Toys:** This segment includes chocolate products sold with a toy or surprise. These include chocolate eggs with gifts contained inside, and toys with chocolate sold inside.
- **Countlines:** This segment includes chocolate bars that are eaten as snacks. Many are filled and unsegmented (i.e. not pre-cut). Countlines can be sold in a diversity of formats, including multipacks or mini sizes. Other products in this category include wafer bars and cereal/muesli bars coated with chocolate. However, cereal/muesli bars, which are nutritionally fortified and coated with chocolate are excluded.
- **Seasonal Chocolate:** This segment includes selection boxes and hollow molded figures for seasonal occasions/holidays (Easter, Valentine's Day, Christmas, Halloween, etc.). Chocolate eggs, which may be large, small or mini, packaged or unpackaged, filled or unfilled, are also included. However, eggs with a surprise are excluded – see Chocolate with Toys.



- **Tablets:** This segment includes molded and segmented chocolate bars in a wide range of sizes from bite-size to “family bars”; some are filled with nuts and/or raisins and made of different types of chocolate. Tablets in countline format are included. “Fun size” tablets are also included here, be they sold individually or in multipacks.
- **Other Chocolate Confectionery:** Chocolate products that do not fall within the previous chocolate definitions are included (e.g. chocolate lollipops, chocolate-flavoured lollipops, liquid chocolate, chocolate foam, etc.).

### **Sugar Confectionery**

- **Boiled Sweets:** Any flavoured candies made from boiled sugar and resulting in hard or soft drops; mints and lollipops are excluded.
- **Liquorice:** This covers liquorice-flavoured products, principally in the form of boiled sweets and chews.
- **Lollipops:** Any sweets sold on sticks are included. Also includes lollipops containing a chewing gum or other confectionery centre.
- **Medicated Confectionery:** Any sugar confectionery product containing herbs and/or plants extracts. Medicated mints fall into this subsector.
- **Mints:** Includes both standard mints (any sweets flavoured with mint, regardless of type or texture [i.e. size, sugarized, sugar-free, soft, hard, etc.]) and power mints/breath fresheners (characterized by a stronger mint taste due to the addition of ingredients such as xylitol and flavour enhancements, and/or a much higher concentration of mint).
- **Pastilles, Gums, Jellies and Chews:** Any flavoured soft/chewy candies made from fruit juice boiled with sugar and gelatine. Jellied fruits are included. Pastilles, gums, jellies and chews containing liquorice or liquorice flavours are excluded.
- **Toffees, Caramels and Nougat:** Toffees are hard, chewy candies made of brown sugar or molasses and butter or caramelized sugar cooled in thin sheets. Caramels are smooth chewy candies made with sugar, butter, cream or milk. Nougats are chewy confections made from a sugar or honey paste into which nuts and/or fruit are typically mixed.
- **Other Sugar Confectionery:** Any sugar confectionery product not included above, such as marshmallow or sweet liquid concentrates sold as candies.

### **Gum**

- **Bubble Gum:** Similar product to chewing gum but specifically marketed at children/adolescents, with blowing bubbles as the principal marketing theme. Both sugarized and sugar-free bubble gum are included.
- **Sugar-Free Chewing Gum:** Any flavoured and sugar-free gum which is chewed but not swallowed falls under this heading. Functional sugar-free gum is also included here.
- **Sugarized Chewing Gum:** Any flavoured and sugarized gum which is chewed but not swallowed falls under this heading. Functional sugarized gum is also included here.



## **Confectionery Products in Japan**

*Global Analysis Report*

Prepared by: Shannon Fraser, Market Analyst

© Her Majesty the Queen in Right of Canada,  
represented by the Minister of Agriculture and Agri-Food (2015).

### **Photo Credits**

All photographs reproduced in this publication are used by permission of the rights holders.  
All images, unless otherwise noted, are copyright Her Majesty the Queen in Right of Canada.

For additional copies, to request an alternate format, and for all other inquiries regarding this publication,  
please contact:

Agriculture and Agri-Food Canada, Global Analysis  
1341 Baseline Road, Tower 5, 3rd floor  
Ottawa, ON  
Canada, K1A 0C5  
E-mail: [infoservice@agr.gc.ca](mailto:infoservice@agr.gc.ca)

The Government of Canada has prepared this report based on primary and secondary sources of information. Although every effort has been made to ensure that the information is accurate, Agriculture and Agri-Food Canada (AAFC) assumes no liability for any actions taken based on the information contained herein.

Reproduction or redistribution of this document, in whole or in part, must include acknowledgement of Agriculture and Agri-Food Canada as the owner of the copyright in the document, through a reference citing AAFC, the title of the document and the year. Where the reproduction or redistribution includes data from this document, it must also include an acknowledgement of the specific data source(s), as noted in this document.

Agriculture and Agri-Food Canada provides this document and other report services to agriculture and food industry clients free of charge.