



insights
to
grow

2013 Annual Quantification Report: Chewing and Bubble Gum in South Africa Media Feedback

Product Definitions

Product Definitions	Definition
Chewing and Bubble Gum	<p>Chewing and bubble gum is an emulsion made of a gum base, sweeteners including sucrose, corn syrup, dextrose and for sugarless types, mannitol, sorbitol and xylitol; acidulants and/or flavours; possibly a plasticizer such as sorbitol and highly concentrated oil-based flavours; and glycerine such as humecant.</p> <p>The difference between chewing and bubble gum is the ability to make bubbles. This happens because bubble gum bases contain higher levels of polymers or rubbers.</p>

Market Trends

The majority of the chewing gum market is imported from overseas. The cost of importing the product has not shifted much in the past year, so the growth of the category was able to continue at a similar pace to that seen in 2011.

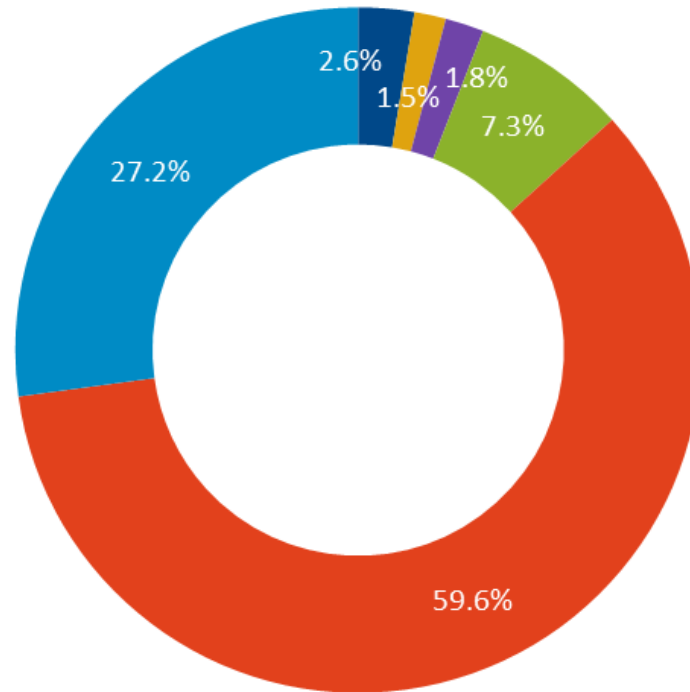
Bubble gum saw a lower growth in 2012 than that recorded for 2011. The 2011 year saw a particular player recording substantial growth and significant market activity to match, but as this was not sustainable, category growth tapered off somewhat during 2012.

Bubble gum is the least expensive product of the two in this category but through sheer volume size, it maintains a substantial share of the value of this market.

Independent wholesalers hold the largest share of category channel distribution, much like previous years. Wholesale chains have lost share, whilst garage forecourts have grown. Even though some brands are now seen frequently in foodservice outlets, this has not helped to bolster the volumes in this sector.

There has been very little movement in the regional shifts in both chewing and bubble gum, as the players are well established provincially.

Local Channel Distribution of Chewing and Bubble Gum



■ Convenience Retail

■ Foodservices & Industrial

■ Garage Forecourts

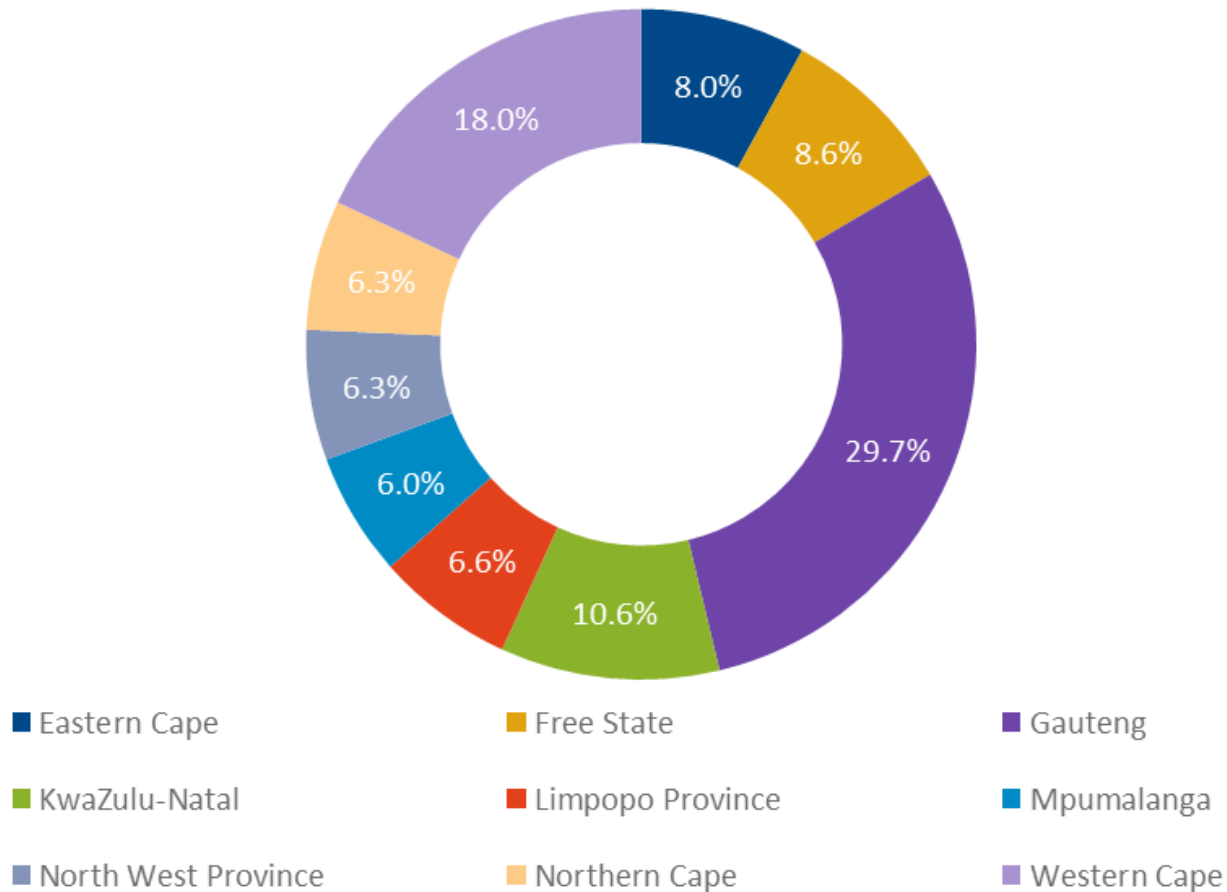
■ General Retail

■ Independent Wholesalers

■ Wholesale Chains

Excludes Exports

Local Regional Distribution of Chewing and Bubble Gum



Excludes Exports

BMi Research Services

Annual Quantifications

BMi Tracking Report Schedule 2013

In Store Observation Services & Liquor In Store Pricing

Print Ads Promotional Pricing and Share of Spend

Commissioned Research

Consumer Research



Market Quantification involves sizing up markets annually to see volume, value and consumption trends. The service is available for most food, beverage, confectionery and snack products. We have more than 10 years of historical data in tracking each market. Using these insights, you're able to harness the potential in your market by understanding strategic category trends across the total market. A unique offering incorporating formal and informal market components.

Total market includes retail, wholesale, foodservices, industrial and exports.

Market Quantifications

Total market quantification for 140 CPG Categories

What are the latest market trends? And...

- Is the category growing or declining?
- What does the future hold for the category?
- What are packaging trends for the market?
- Are category sales growing or declining in retail, wholesale or export?
- How is your product performing in foodservices?



BMi Tracking Report Schedule 2013

Packaging	Annual Beverage Publications		
All reports	Full Report (All reports below)		
<ul style="list-style-type: none">• Packaging overview• Paper & Board• QPM• Quarterly Import	<i>Alcoholic Beverages</i> <ul style="list-style-type: none">• Flavoured Alcoholic Beverages• Malt Beer• Sorghum Beer• Spirits• Wine	<i>Non Alcoholic Beverages</i> <ul style="list-style-type: none">• Bottled Water• Carbonated Soft Drinks• Cordials and Squash• Energy Drinks• Fruit Juice• Iced Tea• Mageu• Sports Drinks	<i>Dairy Beverages</i> <ul style="list-style-type: none">• Dairy Juice Blends• Drinking Yoghurt• Flavoured Milk• Maas• Milk
Annual Food Publications	Confectionery & Snacks	On Request	
<ul style="list-style-type: none">• Canned Protein• Dairy• Desserts• F&C Beverages• Pasta• Rice• Wheat and Grain	<ul style="list-style-type: none">• Ice Cream• Packaging of Snack Foods• South African Confectionery Market• The Impulse Market in South Africa	<ul style="list-style-type: none">• Biscuits and Rusks• Breakfast Foods• Baked Products• Baking Aids• Eggs• Fats and Oils• Frozen and Par-Baked Products• Premixes• Pre-prepared Meals	<ul style="list-style-type: none">• Processed Meat Products• Protein• Sauces• Soup and Condiments• Sweet and Savoury Spreads• Value Added Meals

For further enquiries please contact research@bmi.co.za

Gives first-hand insight into your brand's performance in-store. Monitor your products versus your competitors' to assess your performance and remedy gaps. Ensure accurate data which translates into tactical competitive advantages.

In Store Observation Services & Liquor In Store Pricing

ISOS/LISP

How is your brand performing in store? And...

- Is my product available on shelf?
- Does my brand have its fair share of shelf space?
- Is my product listed and available in all stores?
- Is my gondola end in store?
- Do I have promotional activity in that particular store?



Covers all brands advertised in all regions by retailer by month. The analysis provides an inside picture of the retail promotional environment. Track competitor promotions and pricing, offering top line or granular data.

Assess whether your brand is gaining sufficient share, relative to your spend on promotional print advertising. Track competitor promotional pricing to tactically react on your own product pricing.

Print Ads Promotional Pricing & Share of Spend

Is your product visible enough in promotional print Media?

Daily, we answer questions like:

- What is the promotional pricing?
- What is the regional promotional pricing variance?
- What are competitors' pricing tactics?
- What Rand value is spent on our brand vs. competitor brands by retailers?
- Are we losing market share because of this?

Coverage:

- National daily and weekly newspapers
- Weekly community newspapers
- Consumer magazines
- In-store broadsheets



Consumer Division has a passionate focus on consumer behaviour, combining professional skills with optimal technology and products to complement insights. Project teams are hand picked based on their knowledge and expertise of the subject matter and offers a range of research methodologies that aim to give you a multi-dimensional and insightful solution to the understanding of your product/brand. The division has the ability to draw on BMi Research's established experience in the retail and wholesale sectors, providing a unique and customized solution to understanding consumer behaviour.

Consumer Research

Getting into the hearts and minds of Consumers through interaction, stimulation and discussion

Qualitative and Quantitative solutions including...

- Focus groups
- Depth interviews
- Workshops
- Shopper Insights
- Store visits
- In home visits
- Consumer surveys
- Online research
- International project management



If your research need is not covered by our standard set of services, we will tailor-make a study specifically for you.

BMI's Commissioned Research is designed specifically to answer your questions in your particular market. From industrial assessments to traditional consumer studies, we have the expertise to grow your business.

Commissioned Research

*Need to investigate the market regarding other issues?
Examples include*

- Service Quality Measurement (SQM)
- Pack Type Testing and Preference
- Product Testing includes taste tests and new product development



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Note:

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