



2013 Annual Quantification Report: Baked Products in South Africa

Media Feedback Report

Market Trends

Movement in the baked products market is currently seen mostly in the baked confectionery industry, which saw a growth in 2012. This market has experienced similar growths over the past few years, primarily with pushes from the larger players who are entering this market.

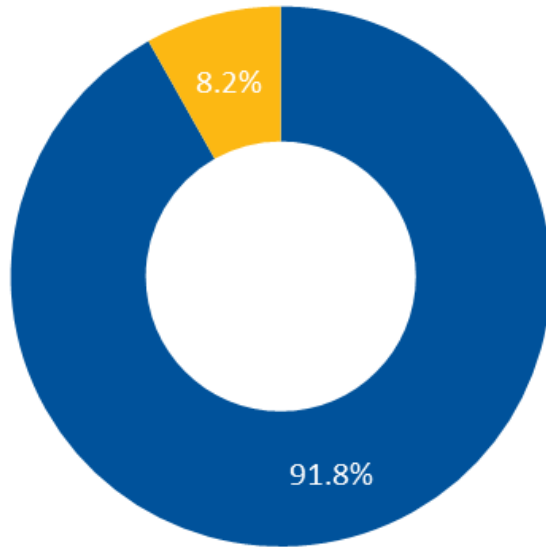
The bread market has had limited growth, with many stating the cause for this being due to a well established market where there is little room for growth. It is also under pressure from the increasing presence of baked confectionery, as well as the trends seen in wheat flour, which saw conservative growth for 2012.

Though the majority of the baked product volumes are sold through the retail sector, there has been an increase in the volumes sold out of the foodservices industry, as more foodservice outlets are choosing to make their own products for added value and quality.

Players are well established in their regions and as such, little change has occurred in terms of regional distribution over the past few years. However a trend seen amongst many food and beverage categories is the shift towards the smaller, less urbanised regions, as potential is seen in these ever growing areas.

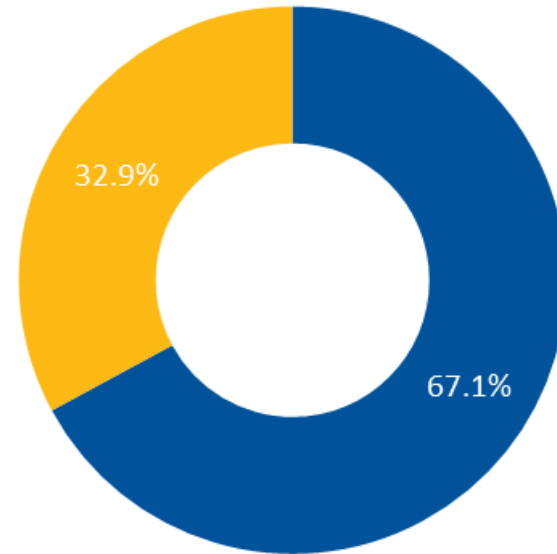
Total Market Volume Baked Products 2012

2012 Volume



■ Bread ■ Baked Confectionery

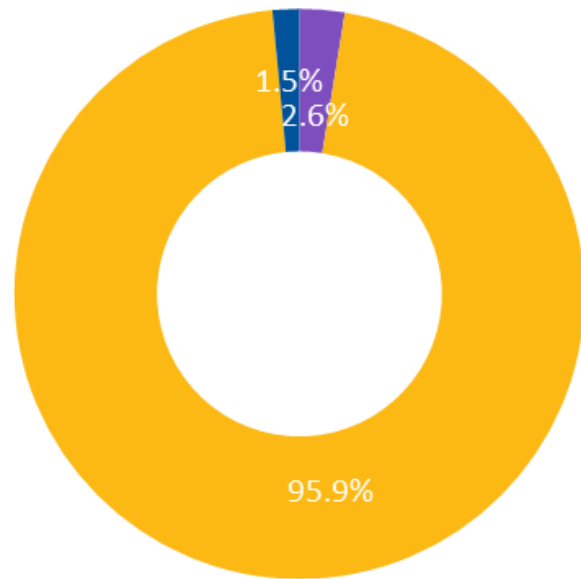
2012 Value



■ Bread ■ Baked Confectionery

Channel Distribution Baked Products 2012

2012 Volume

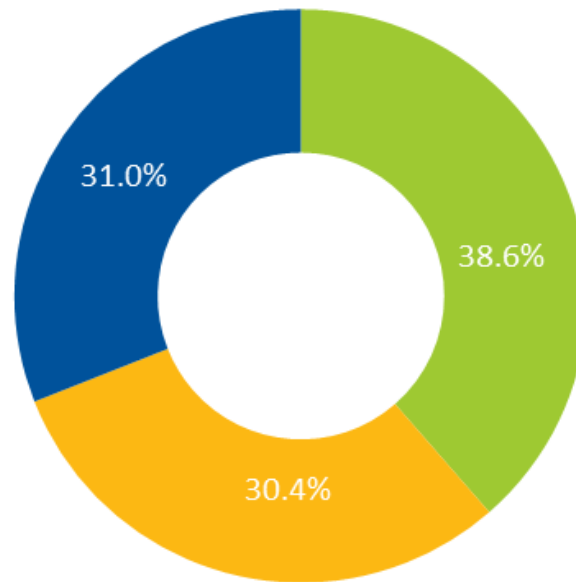


■ Foodservices Direct ■ Retail ■ Wholesale

Exports have been included in retail due to confidentiality issues

Local Regional Distribution Baked Products 2012

2012 Volume



■ Coastal Provinces ■ Gauteng ■ Inland Provinces

Exports have been included in each of the regions they are distributed from due to confidentiality issues

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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BMi Research (Pty) Ltd

Reg No. 2008/004751/07



Contact

For further information please contact BMi Research (Pty) Ltd:

Tel: +27 11 615 7000

Fax: +27 11 615 4999

Email: research@bmi.co.za

Website: www.bmi.co.za

