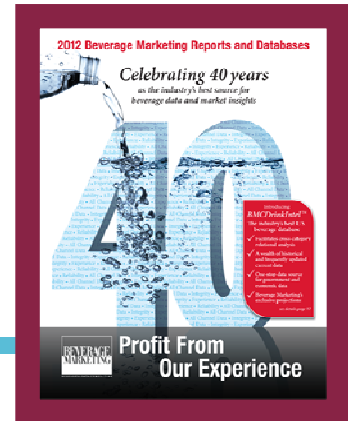


U.S. CANDY MARKET TRENDS

2012 EDITION (Published August 2012. Data through 2011. Market projections through 2016.) More than 30 pages, with extensive text, graphs, charts and tables



The BMC Information Services Division of Beverage Marketing puts the spotlight on the candy market, providing total market, all-sales-channel inclusive historical and current data for six candy segments, plus commentary and data forecasts through 2016. Also provides company and brand data for select retail channels.

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HAVE
QUESTIONS?

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THE ANSWERS YOU NEED

This report looks at the candy market by type, discusses activities of key industry players and takes a look at statistics and trends for various candy segments. Questions answered include:

- Which candy segment is growing fastest?
- How much are various candy manufacturers spending on their brands and how has that shifted over the years?
- Which distribution channels are most important in the candy market?

THIS REPORT FEATURES

U.S. Candy Market Trends focuses on the changing candy landscape, providing a concise look at the demand for various types of candy and their respective outlooks for future growth. It offers analysis of leading candy producers plus all-sales-channel inclusive data to provide a total market perspective.

Coverage includes:

- Data providing historical and current wholesale dollar statistics as well as growth and respective market share for chocolate candy, chewy and soft candy, gum, hard candy, panned non-chocolate candy and licorice.
- Discussion of the leading companies, their product entries and marketing activities
- Advertising expenditures for leading candy brands historically and currently, as well as their relative share of advertising dollars spent in the category and the growth/decline of each brand's ad support over time
- A break-out of candy sales through various distribution channels including supermarkets, convenience stores, Wal-Mart, drug stores, warehouse clubs, mass merchandisers, bulk, vending and dollar stores.
- Projections for the future of the various candy segments

Focus Report
U.S. Candy
Market Trends
August 2012



RESEARCH • DATA • CONSULTING

NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

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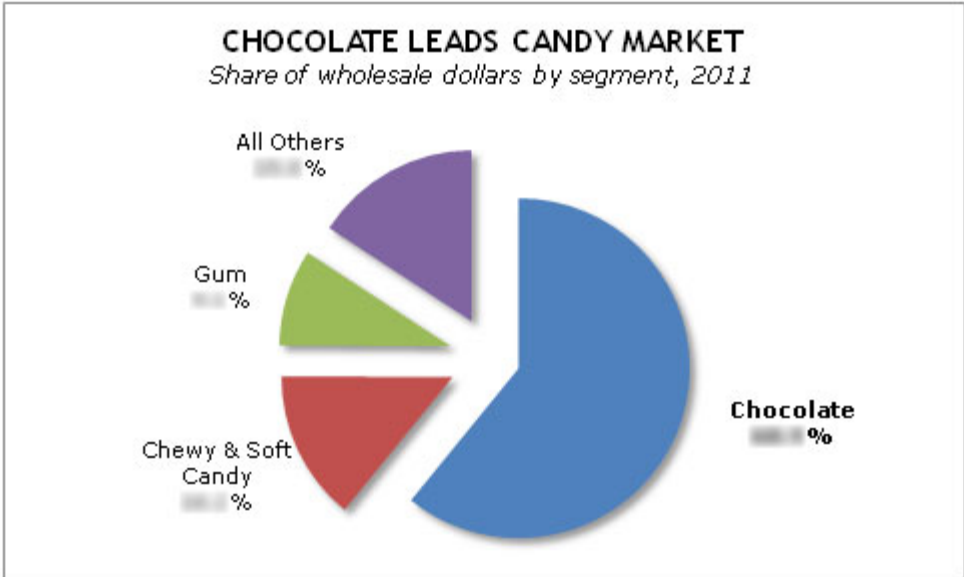
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Candy sees the biggest companies' brands accounting for the bulk of marketing communication dollars. The Hershey Company and Mars, Inc., handily dominate the list of leading candy advertisers.

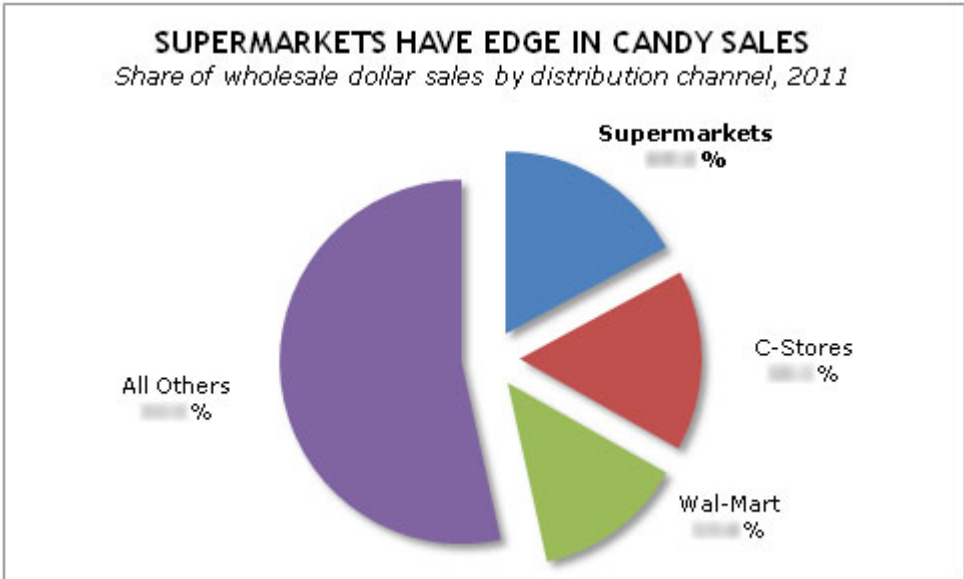
- The Hershey's brand became the sole candy trademark backed with an ad budget bigger than \$100 million in 2009, and it retained that distinction in 2010, when the Hershey Company again upped spending for its flagship. Spending stood above \$100 million in 2011 even after a not inconsiderable cut from the year before. The Pennsylvania company also reduced spending behind the Reese's brand, which ranked as the number-one brand among the most aggressively advertised trademarks in 2011.
- Mars owned five of the top 10 brands ranked by advertising expenditures in 2011. Together, Hershey and Mars accounted for 40% of the 10. Switzerland's Chocoladefabriken Lindt & Sprüngli AG and Nestlé and Kraft Foods held the other three.
- Chocolate and gum brands crowded the top of the list of leaders in ad spending.

To an even greater degree than snack food advertisers, candy advertisers made their TV proclivities immediately plain.

- Cable TV and network TV, respectively, took the top two positions in candy advertising expenditures by media.
- By itself, cable TV accounted for almost 50% of all candy ad spending.
- All types of television together received more than 80% of candy advertising dollars. Magazines ranked second, between network television and third-place syndicated TV.



Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation

**U.S. CANDY MARKET
SHARE OF ESTIMATED WHOLESALE DOLLAR SALES BY DISTRIBUTION CHANNEL
2006 – 2011**

Distribution Channels	2006	2007	2008	2009	2010	2011
Supermarket	38.0%	38.0%	38.0%	38.0%	38.0%	38.0%
Convenience Stores	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%
Wal-Mart	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%
Drug Stores	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%
Warehouse Clubs	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
Mass Merchandisers	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
Bulk	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
Vending	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
Dollar Stores	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
Others*	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
TOTAL ALL CHANNELS	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

* Includes health-food stores, military, schools, "mom & pop" stores, airlines, stadiums, online retailers, etc.

Source: Beverage Marketing Corporation