

CAA International Cocoa Conference

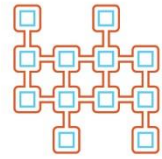
Marketing & Innovation: Post- pandemic trends in Asia



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2022

Global leader in food ideas and answers



WORLD'S BIGGEST FOOD DATABASE

GLOBAL CONSUMER INSIGHTS



TRULY GLOBAL CONSISTENT COVERAGE



30 YEARS OF TRENDS INSIGHTS



LARGEST COLLECTION OF NEW PRODUCTS ANNUALLY

MARKET SIZING

Chocolate is the key flavor of choice for many sweet product categories

What is your preferred flavor when buying...? (Asia, 2021)

Biscuits & Cookies

Chocolate chip
Milk chocolate
Almond

Cakes & Pastries

Chocolate
Cheese
Fruit

Desserts & Ice cream

Vanilla
Milk chocolate
Strawberry

Bourbon Carb
Balance **Chocolate**
Chip Cookies
Japan, May 2022



7 Eleven **Chocolate Chiffon Cake**
Taiwan (China), Apr 2022



Foxs Silky
Instant Pudding
Powder With
Milk Chocolate
Flavor
Indonesia,
Mar 2022

Sources: Innova Database, Innova Category Survey 2021 (average of China, India, Indonesia, Japan, Malaysia, Philippines, South Korea, Thailand and Vietnam)

Key innovation pillars in Asia's sweet packed goods market

Health

Consumers are looking for natural, clean label concepts with clear front-of-pack communication. From sugar reduction to the rise of plant-based and the use of natural and functional ingredients.



Thailand, Jun 2022

Indulgence

As a result of the pandemic, consumers have been eating more confectionery products. Surprising flavors, bold colors and novel textures is what today's Asian consumer is looking for.



South Korea, Mar 2022

Sustainability

Consumers want to know how and where the products they buy are produced. Local sourcing & production as well as certification and environmental & social impact has become paramount in on-pack communication and brand building.

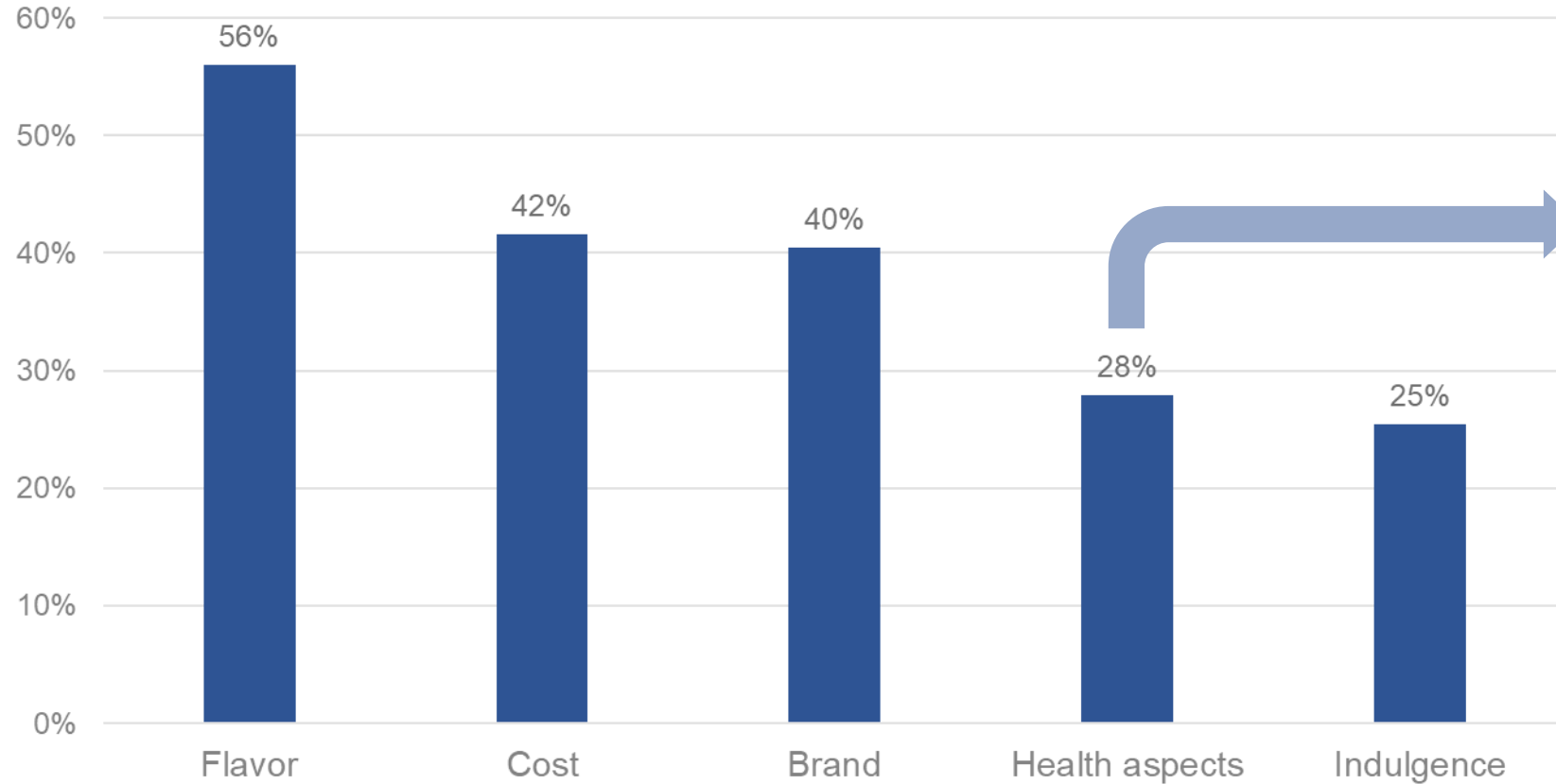


India, Jan 2022

Sources: Innova Database

While flavor remains paramount, health is a key purchase driver too

What attributes most influence your purchasing decision of chocolate?
(Asia, 2021)



China, India & SEA
value health aspects in
chocolate more

Health aspects	
China	37%
India	34%
Vietnam	34%
Philippines	33%
Thailand	31%
Indonesia	30%
Average Asia	28%
Malaysia	23%
Japan	17%
South Korea	13%

Sources: Innova Category Survey 2021 (average of China, India, Indonesia, Japan, Malaysia, Philippines, South Korea, Thailand and Vietnam)

Environmental concerns are growing for consumer in Asia

Education & awareness about world problems grows among Asians

40%

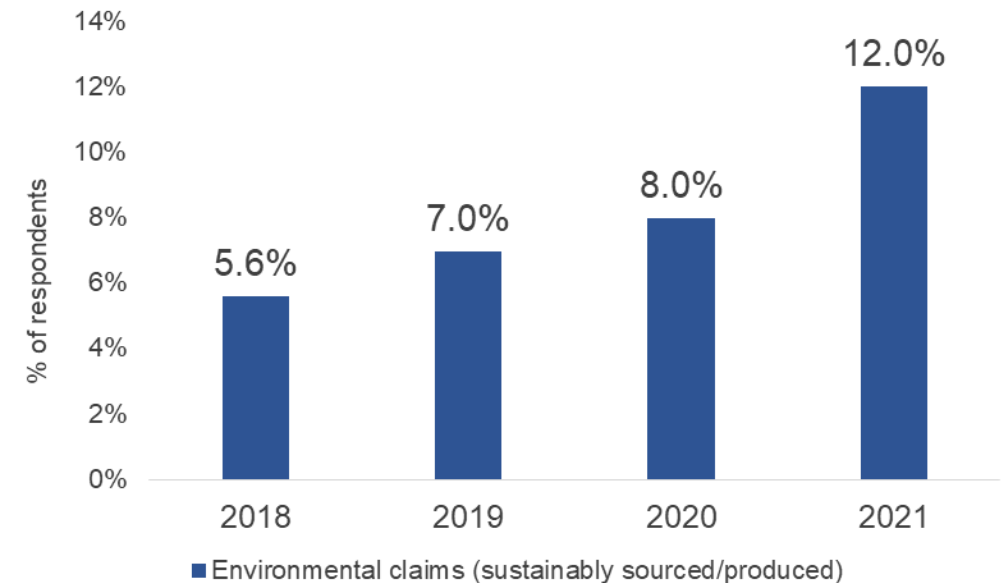
of consumers in Asia say that they have taken personal action to manage or improve **environmental wellbeing** over the past 12 months.



Choose the factors that most influence your purchasing decisions.

Responses for **environmental claims**

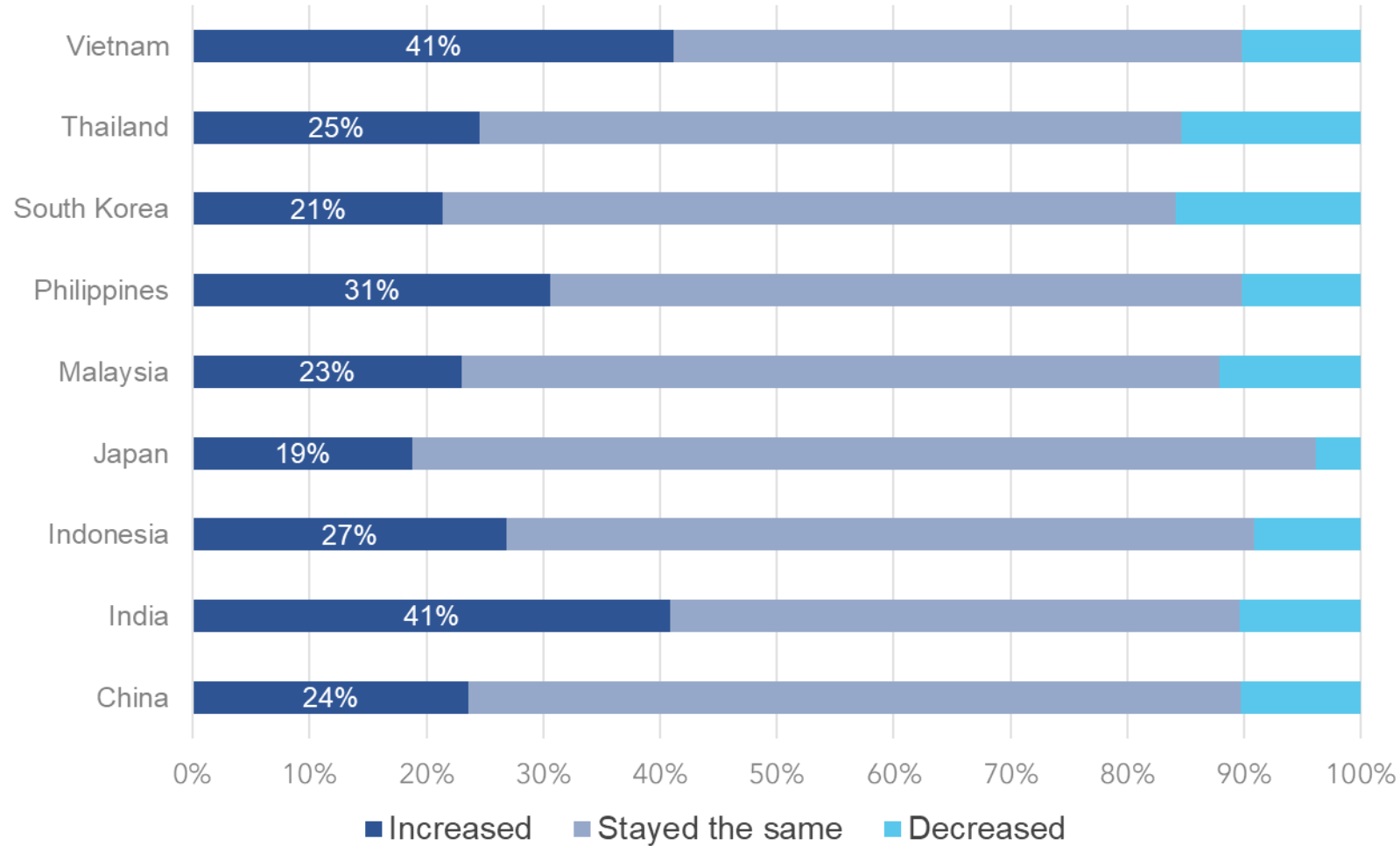
(Average all categories and countries in Asia) (2018-2021)



When asked to pick three factors out of 22 choices, 12% of respondents included environmental claims. Although this lags behind natural and health positionings, the past three years of the survey shows the environment is becoming more important.

Sources: Innova Lifestyle & Attitudes Survey 2021 (average of China, India and Indonesia), Innova Category Surveys 2018-2020 (average of China, India, Japan, Korea, Thailand, Vietnam and Indonesia), Innova Category Survey 2021 (average of China, India, Indonesia, Japan, Malaysia, Philippines, South Korea, Thailand and Vietnam)

How has your consumption of chocolate changed over the past year?

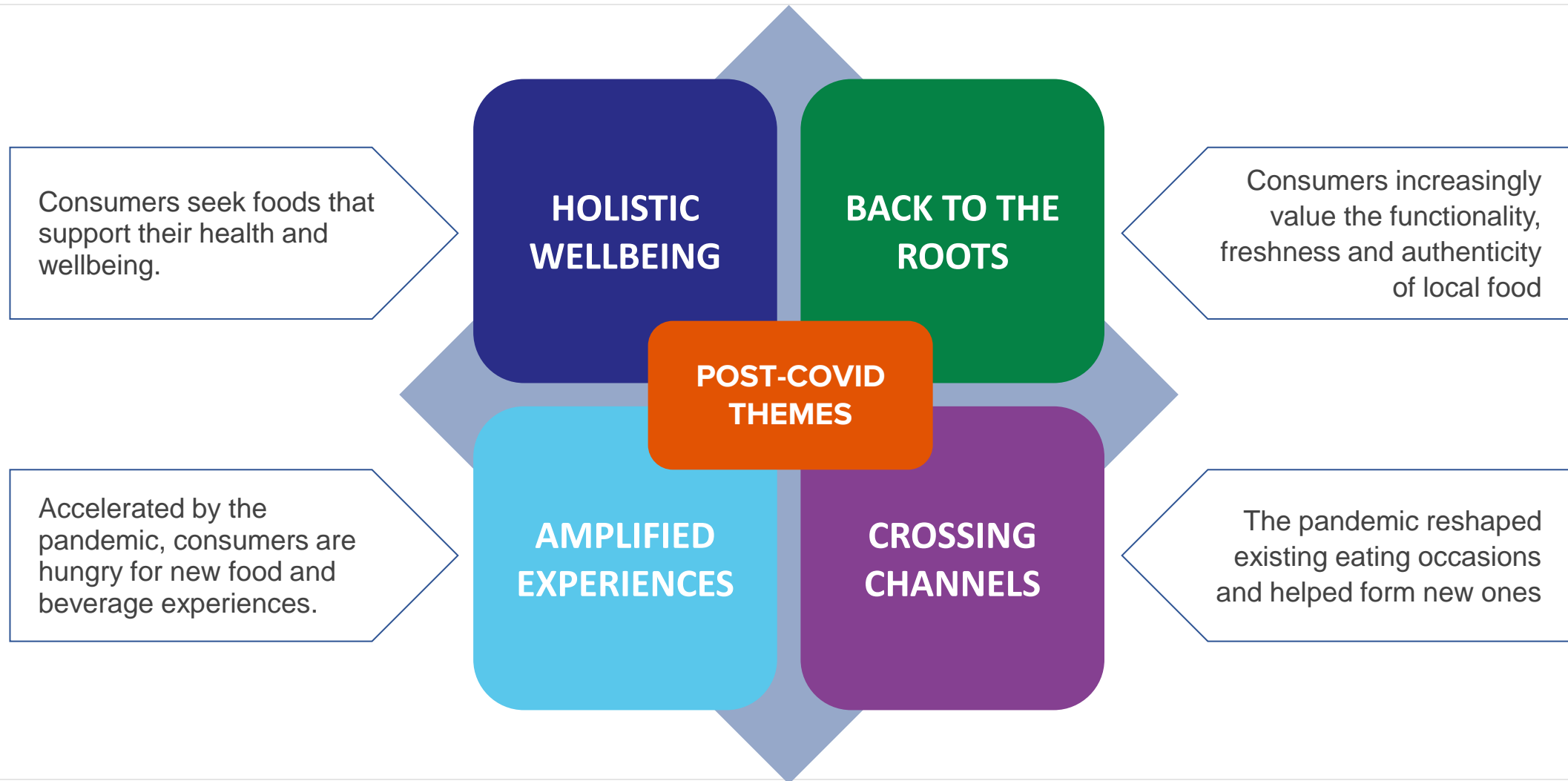


Why increased?

1. There is more novelty available
2. My taste preference has changed
3. As a result of COVID

Sources: Innova Category Survey 2021 (average of China, India, Indonesia, Japan, Malaysia, Philippines, South Korea, Thailand and Vietnam)

Four key trends born in the pandemic that are here to stay



Source: Innova Market Insights

Debate on 'health vs indulgence' finds sweet spot with innovation

1 in 2

consumers globally say
"When I want to have a treat, I make sure I choose the healthier alternative"

... especially consumers in Asia



73%
of consumers in India



69%
of consumers in Indonesia



64%
of consumers in China

Adding health claims to indulgent foods



Open Secret Un Junked Choco Almond Brownie

India, Mar 2022

Un-junked brownie is made with the goodness of cocoa, milk and **protein-packed almonds**. It has **zero refined sugar, no maida and palm oil**. Free of any artificial preservatives or artificial flavors, all natural, giving you an indulgent and no-guilt brownies.

Adding indulgence claims to healthy foods



Monkey Bar Protein Coconut Crunch Energy Bar

India, Feb 2022

Cocoa gives a lovely chocolate **indulgence making it hard to resist**, It is a **perfect blend of nutrition** with protein rich raw whey and fiber packed rolled oats.

Source: Innova Database, Innova Snacking & Healthy Snacking Survey 2022 (average of UK, US, Spain, France, Brazil, India, Germany, Mexico, China, Indonesia and Canada).

Plant based & vegan claims surge in products with cocoa

Consumer's reasons to consider or avoid buying plant-based alternatives



“What reasons would you consider **100% plant-based alternatives**?”

It is healthier

Better for the environment

Brings variety to my diet



“What reasons would keep you from buying **plant-based alternatives**?”

Poor taste and texture

Too processed/artificial ingredients

Price/value for money

Global brands introduced the trend, local brands follow



Japan, Mar 2022

“**Plant-based formulation solutions for bakery and confectionery fillings**”



Watch out for...



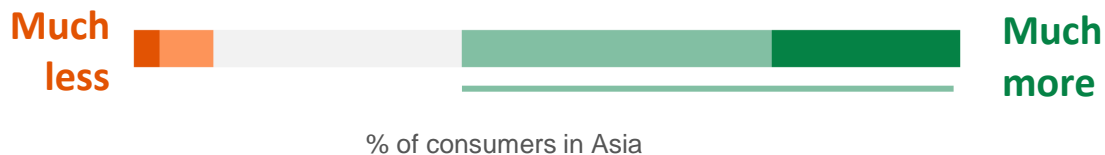
California Cultured is working to grow chocolate in labs. They've managed to produce **sustainable and ethical chocolate alternatives directly from plant stem cells.**

Source: Innova Database, Innova Trends Survey 2021 (average of India, China and Indonesia)

Back to the Roots

Consumers increasingly value the functionality, freshness and authenticity of local food

“If you have bought/sourced more local produce in the past 12 months, to what extent do you expect to continue after the pandemic?”



Online platforms and food delivery provides opportunity for individuals to sell home-made products



Vietnam, Apr 2022

“Made with love. Proudly handcrafted in the Mekong Delta”

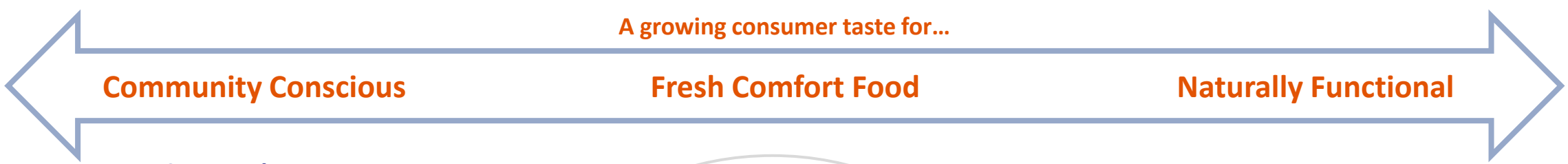
“Inspired by Thai tom ka coconut curry. Grown and crafted in Chiang Mai”



Thailand, Mar 2022

Sources: Innova Database, Innova Lifestyles & Attitudes Survey 2021 (average of India, China and Indonesia)

“Back to the Roots” strategies: what’s next on the shelves?



Community Conscious

Fresh Comfort Food

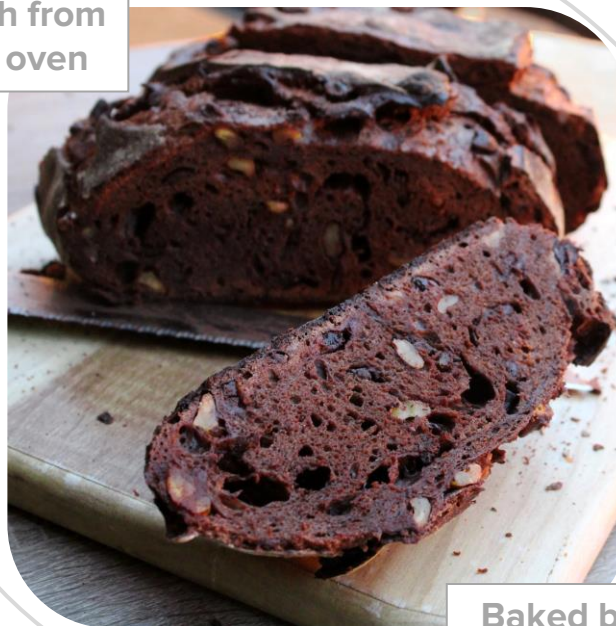
Naturally Functional

Supporting
Local farmers



Indonesia, Dec 2021

Fresh from
the oven



Baked by
local baker

Yoga Bar No
Added
Sugar
Chocolate
Fudge
Brownie
Dessert Bars

India,
May 2022



“100% vegetarian. Rich in proteins. No added sugar, 100% natural and no preservatives. Rich in Omega-3, antioxidants and fiber.”

Sources: Innova Database

Amplified Experiences

Accelerated by the pandemic, consumers are hungry for new food and beverage experiences



More than **2 in 3**

consumers in Asia say: “post COVID-19, I want to be **more adventurous with my food and beverage choices**”

Collaborating brand for success

“I want to **taste/try out new products**, but only if I am **familiar with the brand.**”



“Paul and Mike x Simba bring you a specially **crafted chocolate** for the beer lover in you”

Maison Cacao enhances fragrance and flavor of chocolate

MAISON CACAO

EST 1923
SUNTORY WHISKY
THE FOUNDING HOUSE OF JAPANESE WHISKY

Suntory whiskey chocolates now exist in Japan thanks to Japanese chocolatier Maison Cacao.



Sources: Innova Trends Survey 2021 (average of China, India and Indonesia), [Paul and Mike](#), [Japan Today](#),

Shifting Occasions

The pandemic reshaped existing eating occasions and helped form new ones

Out-of-home

Creating “safer” OOH eating environment

Family Mart presents the first robot barista in Indonesia that serves hot/iced beverages

Jan 2022



“Gong Cha S'pore (Singapore) is launching KitKat-flavored bubble tea”

Brand collaborations as new consumer-retail channels

Foods Service

Enhancing at-home experiences with restaurant branded products available globally



Indonesia, Jan 2022



Japan, May 2022

Retail

Enjoy the taste of ‘Kopi Kenangan’ at-home



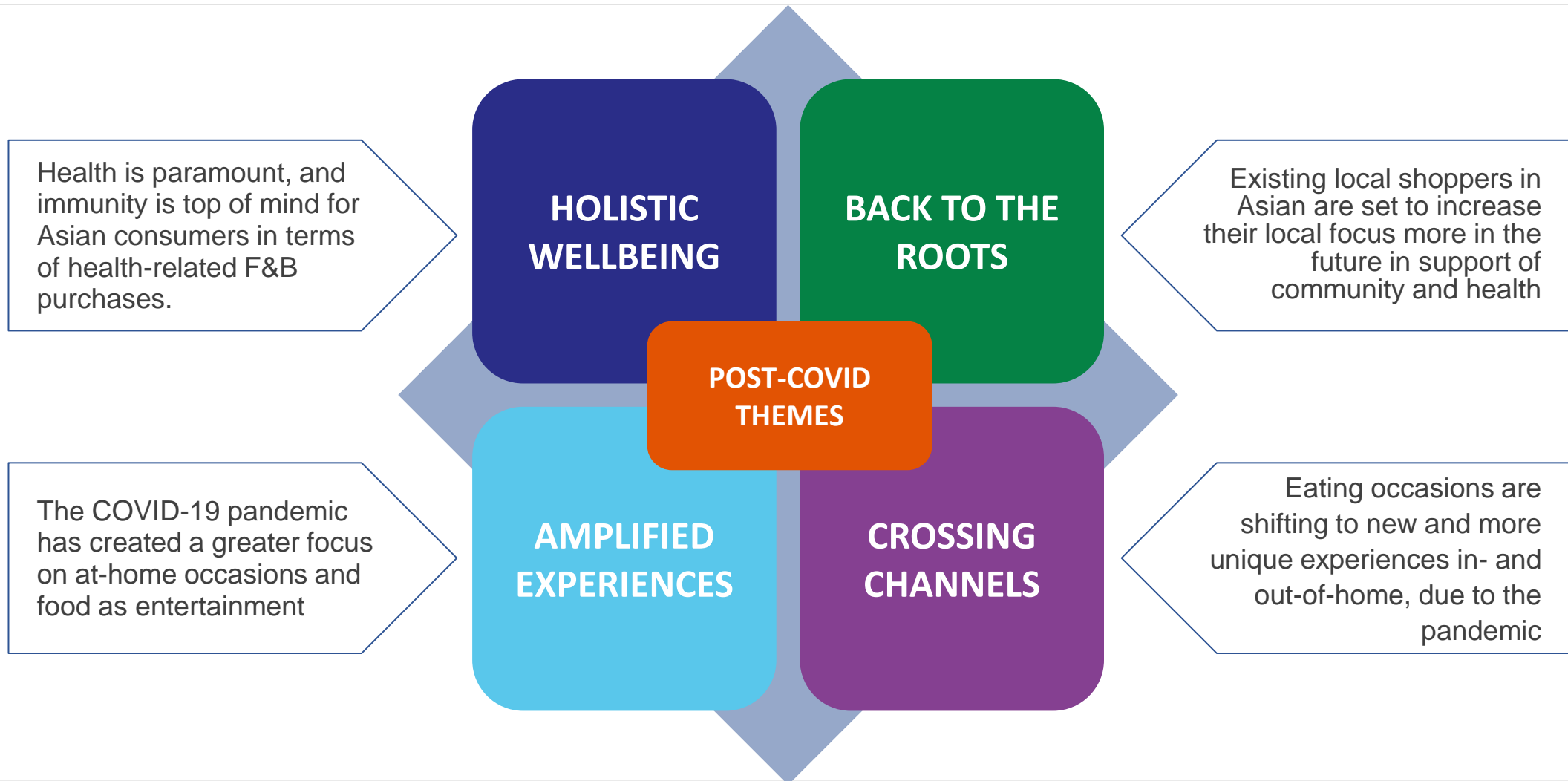
Indonesia, Jan 2022

Kopi Kenangan launches 3 variants of milk-based RTD coffees with a tagline ‘Hanya Untukmu’ (meaning Just For You).

At-home

Sources: Innova Database, Family Mart, Sethlui

Key takeaways



Source: Innova Market Insights

THANK YOU!

For insight-led future growth opportunities

The Innova Database is an online, cutting-edge food and beverage product database – created by a dedicated team of industry-leading food and beverage experts that collect the latest data from more than 90 countries.

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