

SOUTH AFRICAN SWEET BISCUITS INDUSTRY LANDSCAPE REPORT

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COMPANY OVERVIEW



Insight Survey is a boutique South African market research agency with over 15 years of experience, specialising in Business-to-Business (B2B) and Industry research to ensure smarter, more-profitable business decisions are made with reduced investment risk.

We offer **B2B market research solutions** to help you to successfully improve or expand your business, enter new markets, launch new products or better understand your internal and external environment.

We believe in the advantage market research gives business leaders to fully understand their industry, facilitate business strategy, improve company performance, and drive company growth.

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QUESTIONS WE HELP ANSWER

- What is the current and future market size?
- What are the latest global and local trends impacting on the market?
- Who are your key competitors and what is their offering in terms of products, services, pricing and branding?



OUR RESEARCH SOLUTIONS



Competitor pricing research



Store visits and store checks



Competitor interviews



Customer interviews



Company website analysis



Governmental held records

OUR FOOD AND BEVERAGE EXPERIENCE

We are a proudly South African company that have provided market research solutions and Intelligence reports to local and global brands. We have worked with some of the greatest companies and brands in their industries.



The **South African Sweet Biscuits Industry Landscape Report (110 pages)** provides a dynamic synthesis of industry research, examining the local and global **Sweet Biscuits industry (including the impact of COVID-19)** from a uniquely holistic perspective, with detailed insights into the entire value chain – market size, industry trends, innovation and technology, industry drivers and challenges, manufacturer/distributor and retail overview, and pricing analysis.

SOME KEY QUESTIONS THE REPORT WILL HELP YOU TO ANSWER:

For the Global Sweet Biscuits Industry Section:

- What are the current market dynamics of the Global Sweet Biscuits industry?
- Which are the key markets within the Sweet Biscuits industry?
- What are the latest Global Sweet Biscuits industry trends, innovation and technology, drivers, and challenges?

For the South African Sweet Biscuits Industry Section:

- What are the current market dynamics (market size, market value, market volumes, imports and exports trade): 2016-2021 Actual, 2022-2026 Forecasts (including the impact of COVID-19), and distribution channels?
- What are the latest South African Sweet Biscuits industry trends, innovation and technology, drivers and challenges?

For the South African Sweet Biscuits Manufacturer & Distributor Section:

- Which are the key manufacturing and distributor players in the South African Sweet Biscuits industry?
- For each key player, what is the latest company news in terms of products, services, new launches, and marketing initiatives?
- Which popular Sweet Biscuit brands and products do the respective companies manufacture/distribute?

For the South African Sweet Biscuits Retail and Pricing Analysis Section:

- Which are the key retail players (including retail house brands) in the South African Sweet Biscuits industry?
- What are the prices of popular Sweet Biscuit brands across South African retail outlets?

SCREENSHOTS FROM REPORT

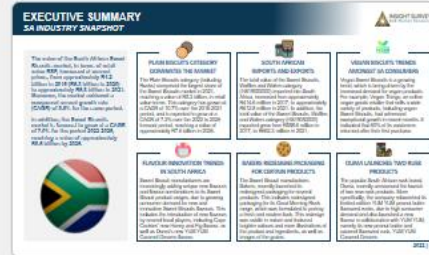
110-page report filled with detailed charts, graphs, and insights



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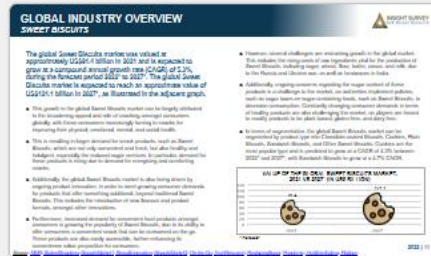
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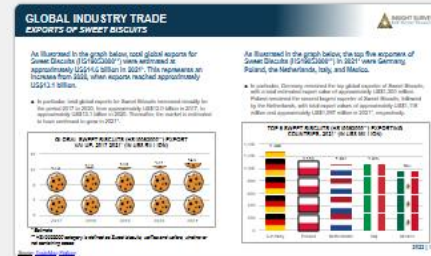
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The global Sweet Biscuits market was valued at approximately US\$91.4 billion in 2021 and is expected to grow at a compound annual growth rate (CAGR) of 5.3%, during the forecast period 2022* to 2027*. The global Sweet Biscuits market is expected to reach an approximate value of US\$121.1 billion in 2027*, as illustrated in the adjacent graph.

- This growth in the global Sweet Biscuits market can be largely attributed to the broadening appeal and role of snacking amongst consumers globally, with these consumers increasingly turning to snacks for improving their physical, emotional, mental, and social health.
- This is resulting in larger demand for snack products, such as Sweet Biscuits, which are not only convenient and fresh, but also healthy and indulgent, especially the reduced-sugar versions. In particular, demand for these products is rising due to demand for energising and comforting snacks.
- Additionally, the global Sweet Biscuits market is also being driven by ongoing product innovation, in order to meet growing consumer demands for products that offer something additional, beyond traditional Sweet Biscuits. This includes the introduction of new flavours and product formats, amongst other innovations.
- Furthermore, increased demand for convenient food products amongst consumers is growing the popularity of Sweet Biscuits, due to its ability to offer consumers a convenient snack that can be consumed on-the-go. These products are also easily accessible, further enhancing its convenience value proposition for consumers.

- However, several challenges are restraining growth in the global market. This includes the rising costs of raw ingredients vital for the production of Sweet Biscuits, including sugar, wheat, flour, butter, cocoa, and milk, due to the Russia and Ukraine war, as well as heatwaves in India.
- Additionally, ongoing concerns regarding the sugar content of these products is a challenge to the market, as authorities implement policies, such as sugar taxes on sugar-containing foods, such as Sweet Biscuits, to decrease consumption. Constantly changing consumer demands in terms of healthy products are also challenging the market, as players are forced to modify products to be plant-based, gluten-free, and dairy-free.
- In terms of segmentation, the global Sweet Biscuits market can be segmented by product type into Chocolate-coated Biscuits, Cookies, Plain Biscuits, Sandwich Biscuits, and Other Sweet Biscuits. Cookies are the most popular type and is predicted to grow at a CAGR of 4.3% between 2022* and 2027*, with Sandwich Biscuits to grow at a 4.7% CAGR.



* Forecast

Vegan Biscuits Trend Amongst South African Consumers

- In South Africa, veganism is growing in popularity amongst consumers, resulting in increased demand for vegan options of their favourite food products, including Sweet Biscuits. This has resulted in the introduction of vegan Sweet Biscuit products, which are becoming more popular, and is a trend that is expected to continue to gain popularity in the country throughout 2022.
- As an illustration of the growth of the vegan trend amongst local consumers, several online news websites, such as the Daily Maverick, Food Stuff SA, and IOL, have published articles recognising plant-based and vegan products as one of the fastest growing trends amongst South African consumers. The vegan trend is also varied as it includes consumers who are dairy intolerant, vegan, as well as those following a flexitarian diet and looking to reduce their consumption of animal products.
- Further illustrating the growth of this trend, Vegan Things, an online vegan goods retailer that sells a wide variety of products, including vegan Sweet Biscuits, stated that it had witnessed exceptional growth in recent months. The company also indicated that around 60% of its customers returned after their first purchase.
- Additionally, the South African Sweet Biscuits manufacturer, in2food, recently opened a new production facility that is dedicated entirely to the production of vegan bakery items, due to increased consumer demand. This bakery range is currently available at select Woolworths stores throughout South Africa and the range is set to expand in the coming months.

- Moreover, Kaylee's Eatery, a producer and manufacturer of 100% vegan food products, announced the launch of the company's own Cookie line, in April 2022. This range includes eight different vegan Sweet Biscuit products, including American-style Chocolate Chip Cookies and homemade-style Buttermilk Rusks, amongst others.
- Furthermore, vegan Sweet Biscuits are also widely available from retailers nationwide, including Woolworths' Vegan Cranberry and Seed Rusks, as well as Faithful to Natures' Quarry Lake Foods Vegan Almond and Aniseed Rusks, amongst others.
- Therefore, the trend of vegan Sweet Biscuits is likely to continue to gain popularity, as more consumers demand vegan versions of their favourite Sweet Biscuit products. In response, market players and retailers are introducing vegan Sweet Biscuit product ranges, making this a trend that is likely to continue to grow in popularity in 2022 and beyond.



Oreo Launches Limited-Edition Batman-Themed Product

- Oreo, a popular brand of Sweet Biscuits in South Africa, recently launched a limited-edition Batman-themed Oreo product, in honour of the new Batman movie which was released in 2022.
- More specifically, this new limited-edition Oreo product is available in a uniquely designed box that features Batman illustrations, as well as a darker design than the original Oreo packaging.
- In addition, the Oreo Cookies feature a picture of Batman instead of the usual Oreo company logo.
- To promote the launch of this limited-edition product, the company hosted a competition for a chance to win a trip to Los Angeles, as well as a tour of the Warner Bros Studios. Participants were encouraged to purchase this product to be eligible for the competition, and the product packaging contains riddles for consumers to solve, in order to increase their chances of winning the competition.



Ouma Launches Two Rusk Products

- The South African rusk manufacturer, Ouma, has recently announced the launch of two rusk products, including a brand-new flavour, as well as the relaunch of a previously popular flavour.
- More specifically, the company relaunched its YUM YUM Peanut Butter Rusks, in collaboration with YUM YUM Peanut Butter. This product was named a special edition flavour by Ouma and the brand relaunched this product due to growing customer demand.
- Additionally, in 2021, Ouma announced that the company would be launching a new flavour of rusks. This flavour was initially kept a secret, with the company releasing several hints, including the phrase 'I'm sugar on fire', prior to launching this product. However, the company has recently revealed the new secret flavour, which was announced to be YUM YUM Caramel Dreams.



SAMPLE FROM REPORT

AVI LIMITED: OVERVIEW



AVI's Sweet Biscuits Brand, Bakers, Features in an Online Chocolate Tart Recipe

In April 2022, AVI's Sweet Biscuits brand, Bakers Romany Creams, featured as an ingredient for a recipe on the Kormorant news website. More specifically, this recipe, titled 'Sunday spoil', featured Bakers Romany Creams as an ingredient for the base of a triple chocolate tart, with the recipe involving blending the biscuits until finely crumbed. [\(24 April 2022\)](#)



Bakers Redesigns its Packaging for Certain Products

AVI's brand, Bakers, featured in a Business Insider article, which detailed the redesigning of its biscuits and crackers packaging. As an example, the brand's Good Morning Rusks would feature a fresh and modern design, incorporating illustrations of product ingredients. However, the article stated that most changes are subtle, in terms of colour hues and box texture. [\(6 April 2022\)](#)



Bakers Posts Recipes on Social Media Using its Products as Ingredients

Throughout 2022, Bakers has shared several recipe posts on its Facebook platform, which include Bakers Sweet Biscuits as ingredients. For example, these recipes included ice cream sandwiches, utilising Bakers Tennis Biscuits, as well as baked breakfast pears, utilising Bakers Nuttikrust Biscuits, amongst others. [\(31 March 2022\)](#)



Bakers Launches a Back-to-School Competition on Social Media

In January 2022, Bakers launched a back-to-school competition on its Facebook platform, which offered participants a chance to win one of ten Takealot vouchers worth R500. In order to enter this competition, participants were required to share a picture of their child's lunchbox, featuring a Bakers 'Back2School' lunchbox snack. [\(11 January 2022\)](#)



AVI Attributes Financial Growth to Increased Consumer Demand for Sweet Biscuits

In January 2022, AVI reported positive financial results, for the six months ended 31 December 2021. More specifically, the company's group revenue grew by 2.3% and its operating profit margin increased by 6.7%. In addition, AVI highlighted that higher realised selling prices were supported by high demand for Sweet Biscuits during the festive season. [\(January 2022\)](#)



AVI's Chief Financial Officer (CFO), Owen Cressey, Resigns

Following the announcement that Mondelēz International's pursuit to purchase AVI fell through, AVI's CFO, Owen Cressey, announced his resignation in December 2021. Following this, Cressey stated that he will be joining Mondelēz International and AVI's National Brands Financial Director, Justin O'Meara, would take over as CFO. [\(13 December 2021\)](#)



AVI's Stock Prices Drop after Termination of Discussions with Mondelēz International

In December 2021, AVI's stock price on the Johannesburg Stock Exchange (JSE) dropped by almost 6%, to R73.85, following the announcement that discussions with Mondelēz International had been terminated. These discussions concerned the potential acquisition of AVI's Snackworks division, which houses its Sweet Biscuits brand, Bakers. [\(13 December 2021\)](#)



AVI's Marie Biscuits Identified as One of South Africa's Heritage Products

In September 2022, Bakers Blue Label Marie Biscuits were featured in an article that highlighted South Africa's heritage brands. More specifically, in honour of Heritage Day in 2021, the Mail & Guardian featured brands and products that have become entrenched in South African culture. In particular, the article identified Marie Biscuits as a staple product in South African households. [\(23 September 2021\)](#)



SAMPLE FROM REPORT

SWEET BISCUITS PRICING ANALYSIS: FILLED BISCUITS

BRAND AND SIZE							
Bakers Choc-Kits Classic Choc		200g	R31.99	R31.99	R31.99	R30.99	R29.99
Bakers Iced Zoo Biscuits		150g	R36.99	R38.95	R39.99	R38.99	R39.99
Bakers Jolly Jammers Biscuit Choc Cream		200g	R31.99	R30.95	R30.99	R31.99	N/A
Bakers Red Label Biscuits Lemon Creams		200g	R21.99	R20.25	R21.99	R19.99	R19.99
Bakers Romany Creams		200g	R31.99	R31.95	R31.99	R30.99	R29.99
Bakers Romany Creams Tarte Biscuits		150g	R25.99	R21.75	R24.99	R24.49	N/A

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