

# Boxed Chocolate Trends

Innova Market Insights

March 2009

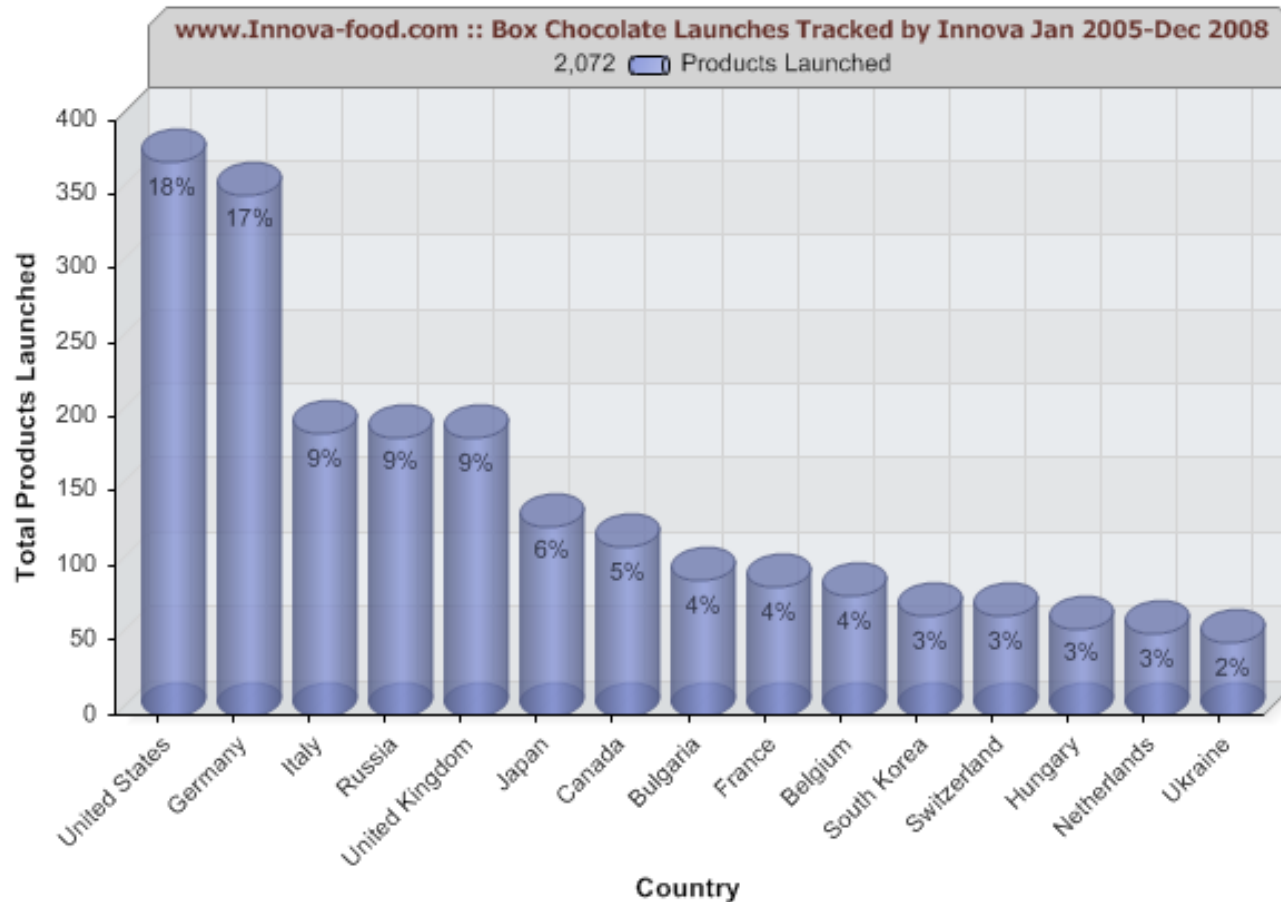
# Presentation Scope

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- This presentation focuses on boxed chocolate product launches from The Innova Database from January 2005-December 2008.
- Product Launch Activity
- Flavour Analysis
- Positioning Analysis
- New Product Trends
- Packaging Analysis

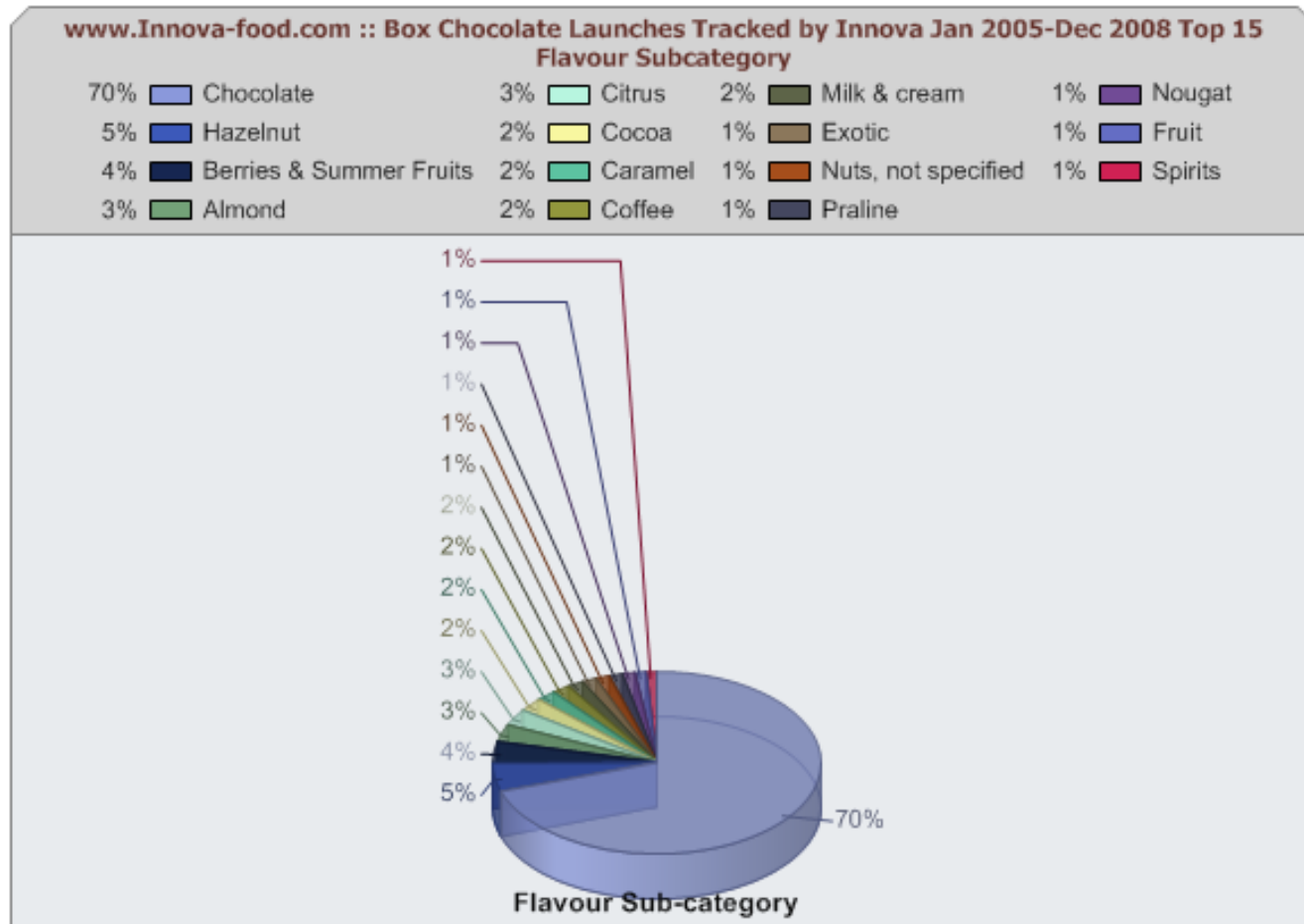
# Product Launch Activity

# Product Launch Analysis: Top 15 Countries

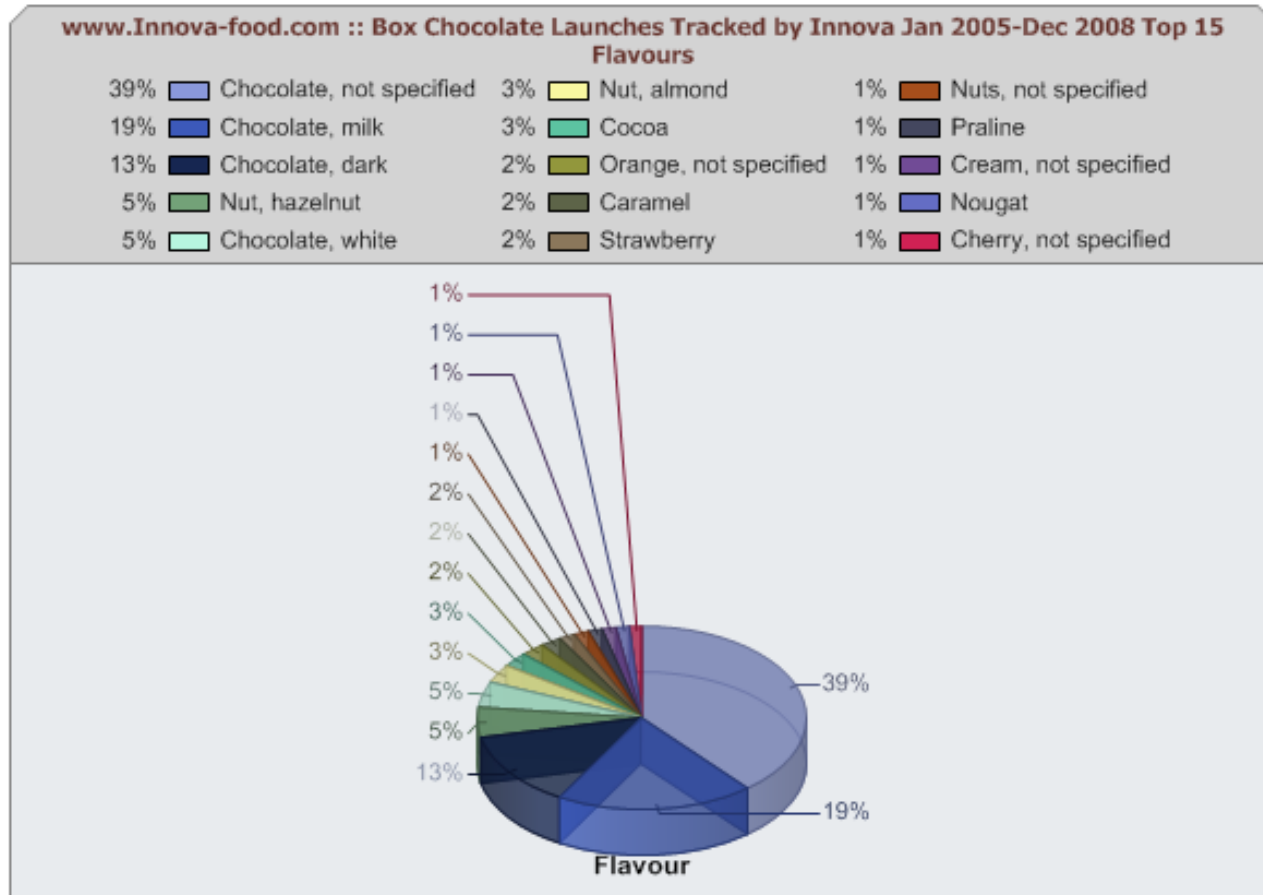


# Flavour Analysis

# Flavour Analysis By Sub-category



# Flavour Analysis: Top 15 Flavours



# Trend: Dessert Flavours

- Indulgent morsels mimicing desserts with some dessert-inspired flavours.



**UK: Gordon Ramsay Just Desserts.** A delicious chocolate selection made with dark, milk, and white Belgian chocolate.

**UK: Lily O'Briens The Desserts Collection.** A unique collection of mouth-watering chocolates inspired by some classic desserts including tiramisu, vanilla ice cream with toffee crisp, strawberry pavlova, lemon and lime sorbet, chocolate fudge cake and amaretti torte.



**USA: Dove Desserts Tiramisu Silky Smooth Dark Chocolate Promises**



**Germany: Lindt Petits Desserts Les Moussees - Mousse Chocolates**

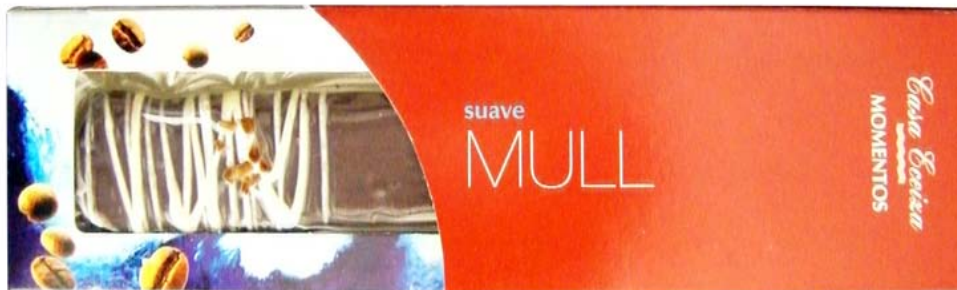
# Trend: Coffee Flavours With A Twist

- Coffee varieties are being used for flavours more frequently, often combined with other flavours for some unique taste experiences.

*USA: Starbucks Chocolate Egnog Latte Flavored Truffles. Rich milk chocolate wraps a creamy center of softly spicy eggnog flavor and espresso roast.*



*Hungary: Bonbonetti Bonbonita Dark Selection. Four kinds of dark chocolate balls - hand made dark chocolate ball filled with eggnog-espresso truffle cream decorated with cocoa powder, hand made dark chocolate balls filled with pina colada truffle cream decorated with shredded coconut, hand made dark chocolate ball filled with sour cherry-almond marzipan truffle cream decorated with dark chocolate flakes, and hand made dark chocolate balls filled with walnut truffle cream decorated with brown sugar.*



*Spain: Casa Eceiza Momentos Mull Chocolate with Coffee Crunch & Whiskey Cream*

# Herbs & Spices For Extreme Flavours

- Salt, pepper, chilli and other herbs & spice additions for discerning tastes.



Spain: Romero Trufas de Chocolate Blanco con Crema de Romero - White Chocolate Truffles with Rosemary Cream  
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Germany: Lindt Edelbitter: Mousse Limette-Grüner Pfeffer - Dark Chocolate with Dark Mousse, Chocolate Filling and Lime Green Pepper Filling



Canada: President's Choice PC Dark Chocolate Covered Caramels with Sea Salts



Germany: Lindt Chocolat Provence - Assorted Chocolates with Rosemary, Lemon-Lavender & Orange-Thyme Flavours

# Trend: New Fruits

- Strawberry, cherry and orange are the most common fruit flavours (present in 5% of launches combined). However, other fruits such as blackberries and blueberries are emerging and are well received by consumers.

*Japan: Meiji Apollo White & Blueberry Chocolate. Limited edition white and blueberry chocolate in a cardboard box.*



*USA: Sweet Shoppe Dipped Blueberries Gift Box. Fresh blueberries dipped in sweet, dark Wolfgang chocolate.*



*Germany: Niederegger Erlesenes Marzipan with Cranberries in Dark Chocolate*  
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*USA: Dove Silky Smooth Dark Chocolate Promises Blackberry Caramel*

# Positioning Analysis

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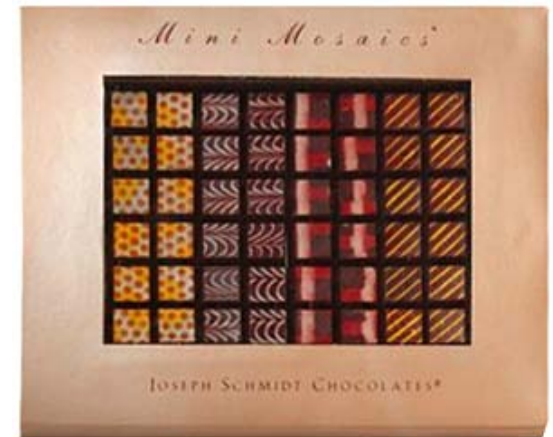
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Positioning Category	Products Launched in (%)
Indulgent and Premium	52
Seasonal/In-Out Products	13
Children (5-12)	10
Novel and Fun	8
Vegetarian	3
Kosher	2
No Additives/Preservatives	2
Organic	2
Halal	1
Gluten Free	1
Convenience	1
Ethical	1
Allergy	1
Economy	1
Antioxidant	1
Total	99

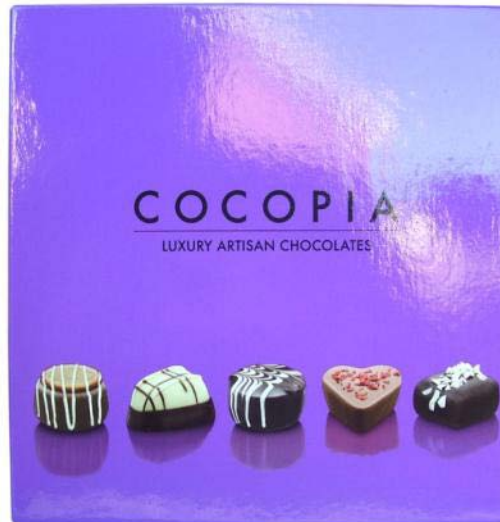
# Indulgent & Premium Boxed Up

- 52% of products were positioned as indulgent and premium -more emphasis on artisanal/hand-made which has more premium appeal.

*USA: Artisan Confections 48 Pk Mini Mosaics Confections*



*USA: Funky Chunky Popcorn 10oz Gift Box. Our popcorn all dressed up for giving. Ten ounces of our delicious chocolate popcorn in a sophisticated gift box.*



*UK: Cocopia Luxury Artisan Chocolates Assortment. An assortment of premium chocolates including black forest gateau, raspberry caramel bombe, pistachio mousse, pot au chocolat and creme brulee.*



*Germany: Lindt Lindor Dark Chocolate. Extra dark chocolate with a soft filling. Comes in a gift cardboard box.*

# Seasonal Launches

- 13% of product launches were positioned as to be seasonal in nature
  - innovative packaging for special times of the year creates more occasions to buy chocolate.



# Seasonal Launches

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- Capitalising on Valentine's Day with heart-shaped boxes.



*Philippines: Lindt Lindor Swiss Premium Truffle. Irresistibly smooth, delicious chocolate shell enrobed a delectably smooth Swiss milk chocolate filling. Packed in a heart-shaped metal box, for Valentine's day.*



*USA: Ferrero Rocher Fine Hazelnut Chocolates. A heart-shaped box of Rocher fine hazelnut chocolates. A Valentine's day special.*



*Hungary: Kraft Milka I Love Milka Pralines Hazelnut Cream. Heart-shaped Alpine milk chocolate pralines with soft hazelnut cream filling, in a heart-shaped cardboard box. Especially for Valentine's Day or for Spring.*

# Ethical Consumerism

- 2% of products launched had an organic positioning and 1% an ethical positioning.
  - Ethical choices have become more in demand due in part by the promotion and success of Fairtrade.



UK: Chocaid.Com 16 Assorted Fairtrade Organic Chocolate Truffles



USA: Truffettes de France Organic Chocolate Truffles



Netherlands: AH Albert Heijn Bonbons Biologisch - Organic Chocolate Bonbons

# New Product Trends

# Trend: Minis



Switzerland:  
Toggi Mini  
Swiss Milk  
Specialty



USA: Reese's  
Milk  
Chocolate  
Coated  
Peanut Butter  
Cups



Austria:  
Lindt Mini  
Pralines



Germany: Milka Exklusive Borkenschokolade  
Minis - Bitter Sweet Mini Dark Chocolate

# Trend: Sharing

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- Creating occasions for sharing.



*UK: Kshocolât For Her Mini Strawberrettes For Him Chilli Almonds. A gift box for Valentine's Day with almonds rolled in spicy ground chili and smothered in milk chocolate for the man and tiny, fruity pieces of strawberry enrobed in luxurious milk chocolate.*

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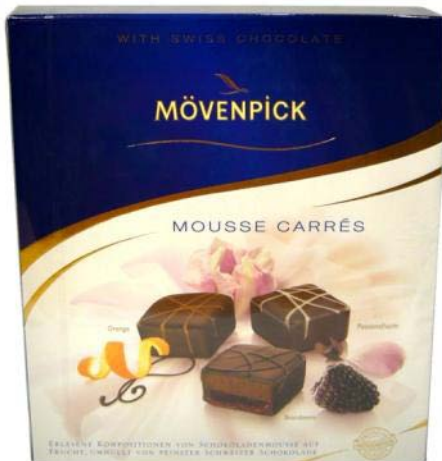


*USA: Astor's Chocolate Liqueur Cups. Sip the drink, nibble the cup! As featured in the South Beach diet. Savor a distinctive drink. Pour your favorite liquor into rich chocolate cups. Sip the drink, nibble the cup! For variety, try topping with whipped cream. A real conversation piece to enchant your guests. Each cup holds 1/3 ounce of liqueur.*

# Trend: Whipping It Up With Mousse



*USA: Godiva Chocolatier New 9pc. Limited Edition Chocolate Mousse Gift Box*



*Germany: Movenpick Mousse Carres: Assorted Mousse Chocolates*



*Russia: Confeterra Chocolate Cream Mousse with Nuts*

*Germany: Storck Werther's Original Karamell Mousse - Whole Milk Chocolate with Caramel Mousse Filling*



*Portugal: Nestle Gold Le Bonbon Mousse Noir - Assorted Chocolate with Mousse Centres*



# Trend: Getting Personal

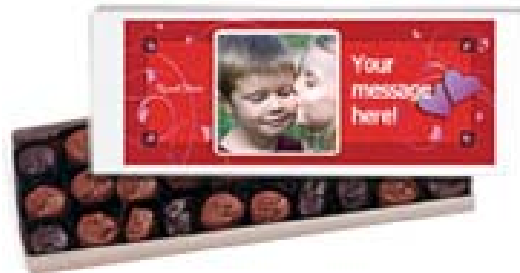


*USA: Askinosie Chocolate Chalk-late Box: Chocolate with Chalkboard . The Chalk-late Box has a chalkboard-top that is a perfect way to send a message to friend or foe (remove the chocolate if sending to foe).*

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*USA: Russell Stover Candies Inc New 7.35oz Assorted Chocolates in a Photo Frame Box. Just add your photo.*



*USA: Russell Stover Candies Personalized Assorted Creams with Chocolate Coating. Personalize a box with your own photos and message. You can get a box chock full of our most popular creams, each piece covered in a layer of sweet milk or dark chocolate inside a box personalized just for you.*



*World's Finest Chocolate New! Name Your Occasion Milk Chocolate with Almonds Bar Box. Personalize the inside lid of the gift box with up to four lines of text, a festive background, and a photo or company logo. Your recipient will appreciate the personalization, and love the premium chocolate candy bars.*

# Packaging Analysis

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Packaging	Products Launched in (%)
Cardboard Box	68
Box	12
Aluminium Wrapper	4
Foil Wrap	3
Carton Box	3
Plastic Tray	2
Plastic Box	2
Plastic Wrapper	1
Metal Box	1
Tin	1
Paper Wrapper	1
Cellophane	1
Foil Sachet	1
Total	100

## Trend: Metal Moments

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- Metal boxes or tins were the packaging choice for 2% of product launches
  - small but special
  - tin can be kept, preserving special memories.



*Italy: Amarelli Rossano Pure Licorice Covered with Chocolate*





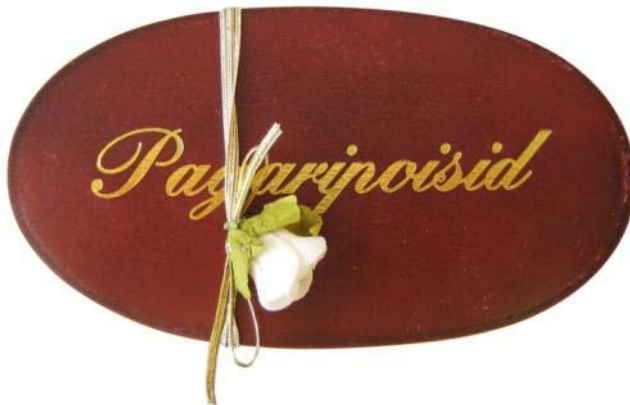
# Trend: Stand And Deliver

- Chocolate packaging standing upright on the shelves commands attention.



# Trend: Think Outside The Square

- Chocolate box packaging need not be square!



# Trend: Window Of Opportunity

- Exposing the chocolate delicacies with clear wrap sells.



*Netherlands: Bovetti Bio Pure Chocolate Met Algen Uit Bretagne: Organic Dark Chocolate with Algae from Brittany*

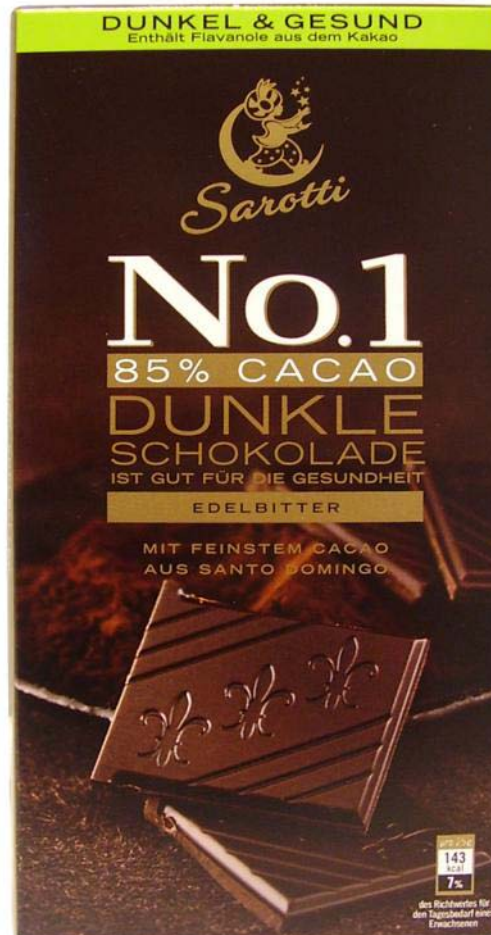
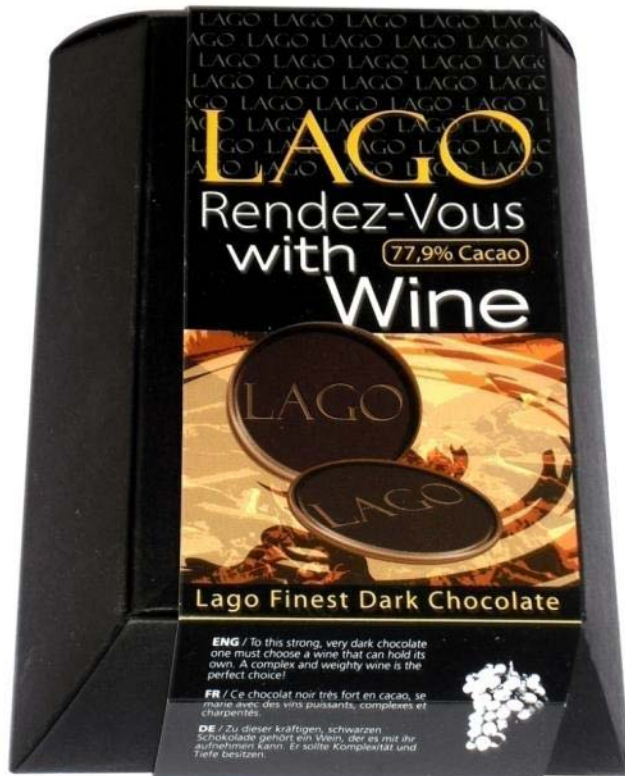
*Hong Kong: Guylian Belgian Chocolate in Sea Shells Shaped with Strawberry Flavor*

*UK: Chocolart 4 Mint Fondants Dark Chocolate*

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# Trend: Boxes For Blocks

- The box has extended to chocolate blocks, replacing the traditional paper wrap.



# Conclusion

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- Boxed chocolate has undergone some transformation in recent times with various flavour and packaging trends.
- New fruits, coffee variations, unusual ingredient combinations and the addition of herbs & spices are all innovations in regard to flavours for boxed chocolate. Texture is also receiving attention, with mousse centres being a current trend.
- Minis and small dessert chocolates are relatively new concepts for boxed chocolate to entice consumers to indulge without guilt.
- The simple box for chocolate still exists, however there is a trend towards contemporary slim-line packaging, vibrant graphics and embossed cardboard or metal. Personalising your chocolate through packaging is also proving to be a novelty.