



# Passport

## Sugar Confectionery in Taiwan

Euromonitor International

July 2021

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purposes only.

Some content and data have been  
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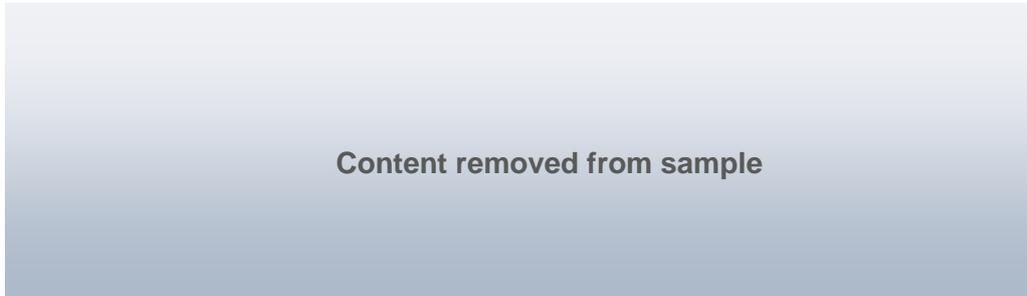
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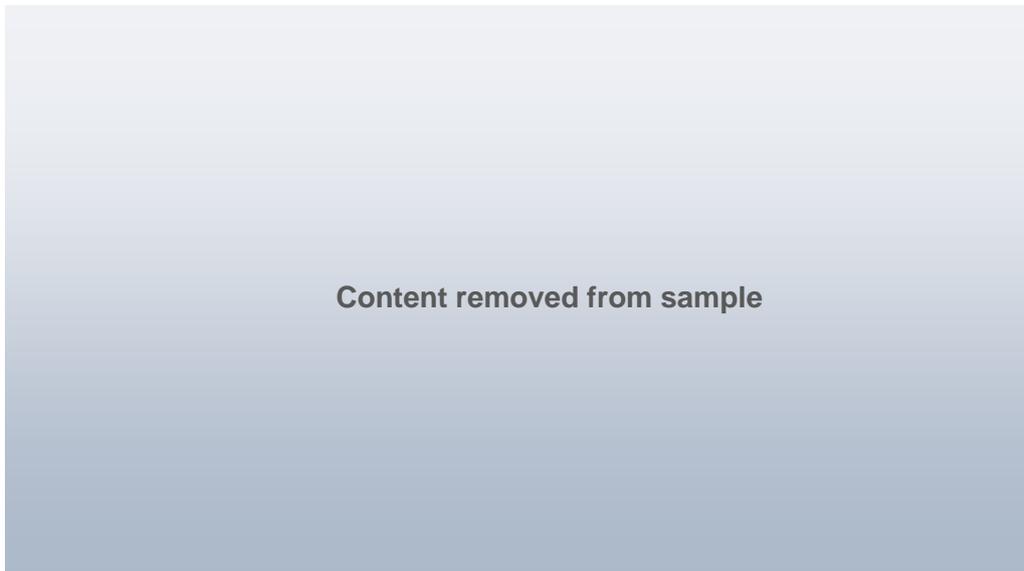
# SUGAR CONFECTIONERY IN TAIWAN - CATEGORY ANALYSIS

## KEY DATA FINDINGS

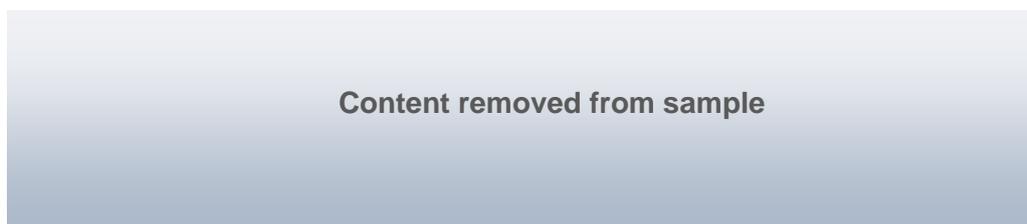


## 2021 DEVELOPMENTS

Full recovery predicted for 2021 due to increasing impulse purchasing occasions



Consumers continue to be attracted to innovative and exciting concepts



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Further potential for e-commerce due to search for novelty

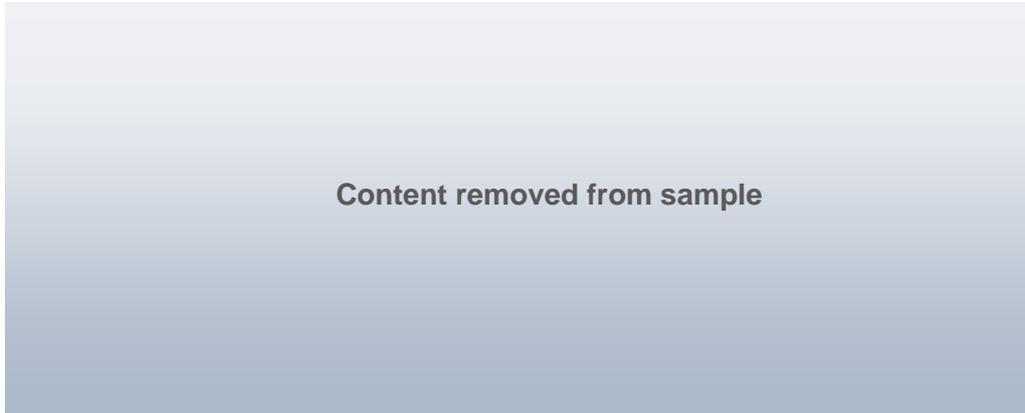
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## PROSPECTS AND OPPORTUNITIES

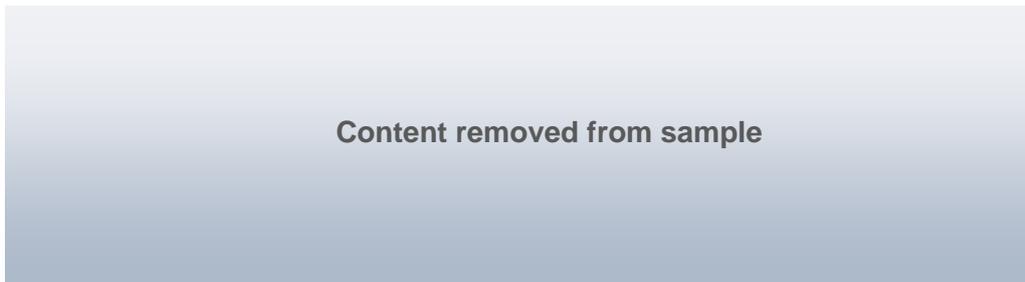
Smaller sugar confectionery categories offer potential with further investment

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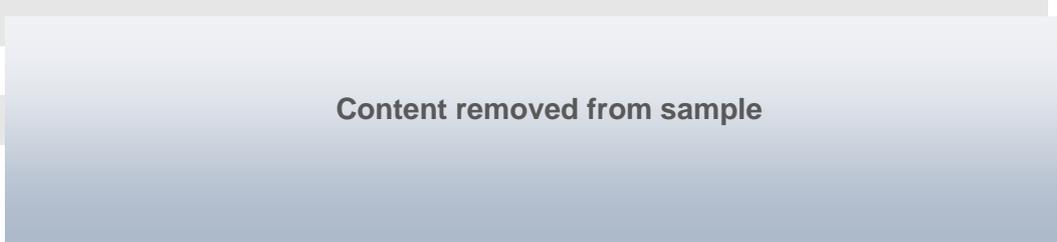
### Sugar confectionery with healthier positioning likely to appeal



### Stronger growth for niche of power mints



Summary 1 Other Sugar Confectionery by Product Type: 2021

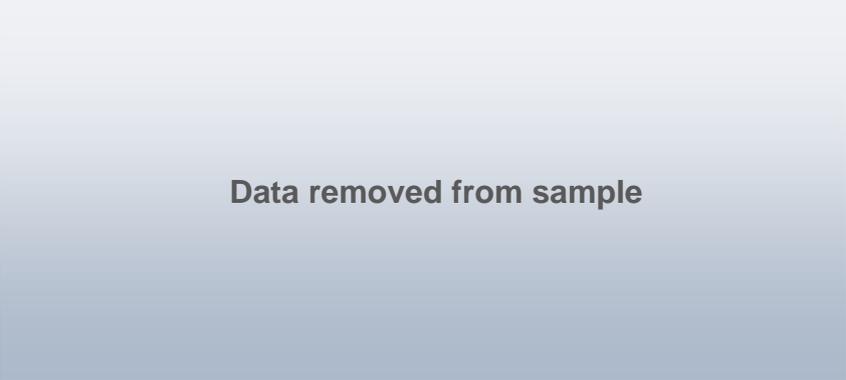


## CATEGORY DATA

Table 1 Sales of Sugar Confectionery by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
-------------	------	------	------	------	------	------

Boiled Sweets  
 Liquorice  
 Lollipops  
 Medicated Confectionery  
 Mints  
 - Power Mints  
 - Standard Mints  
 Pastilles, Gums,  
 Jellies and Chews  
 Toffees, Caramels and  
 Nougat  
 Other Sugar Confectionery  
 Sugar Confectionery



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 2 Sales of Sugar Confectionery by Category: Value 2016-2021**

TWD million

	2016	2017	2018	2019	2020	2021
Boiled Sweets	Data removed from sample					
Liquorice						
Lollipops						
Medicated Confectionery						
Mints						
- Power Mints						
- Standard Mints						
Pastilles, Gums, Jellies and Chews						
Toffees, Caramels and Nougat						
Other Sugar Confectionery						
Sugar Confectionery						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 3 Sales of Sugar Confectionery by Category: % Volume Growth 2016-2021**

% volume growth

	2020/21	2016-21 CAGR	2016/21 Total
Boiled Sweets	Data removed from sample		
Liquorice			
Lollipops			
Medicated Confectionery			
Mints			
- Power Mints			
- Standard Mints			
Pastilles, Gums, Jellies and Chews			
Toffees, Caramels and Nougat			
Other Sugar Confectionery			
Sugar Confectionery			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 4 Sales of Sugar Confectionery by Category: % Value Growth 2016-2021**

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Boiled Sweets	<b>Data removed from sample</b>		
Liquorice			
Lollipops			
Medicated Confectionery			
Mints			
- Power Mints			
- Standard Mints			
Pastilles, Gums, Jellies and Chews			
Toffees, Caramels and Nougat			
Other Sugar Confectionery			
Sugar Confectionery			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5 Sales of Pastilles, Gums, Jellies and Chews by Type: % Value 2016-2021**

% retail value rsp	2016	2017	2018	2019	2020	2021
Gums, Jellies and Chews	<b>Data removed from sample</b>					
Pastilles						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 6 NBO Company Shares of Sugar Confectionery: % Value 2017-2021**

% retail value rsp	2017	2018	2019	2020	2021
Company	<b>Data removed from sample</b>				

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 LBN Brand Shares of Sugar Confectionery: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 8** Distribution of Sugar Confectionery by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	<b>Data removed from sample</b>					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
-- Other Foods Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 9** Forecast Sales of Sugar Confectionery by Category: Volume 2021-2026

'000 tonnes	2021	2022	2023	2024	2025	2026
Boiled Sweets	<b>Data removed from sample</b>					
Liquorice						
Lollipops						
Medicated Confectionery						
Mints						
- Power Mints						
- Standard Mints						
Pastilles, Gums, Jellies and Chews						
Toffees, Caramels and Nougat						
Other Sugar Confectionery						

Sugar Confectionery

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Sales of Sugar Confectionery by Category: Value 2021-2026

TWD million	2021	2022	2023	2024	2025	2026
Boiled Sweets	<b>Data removed from sample</b>					
Liquorice						
Lollipops						
Medicated Confectionery						
Mints						
- Power Mints						
- Standard Mints						
Pastilles, Gums, Jellies and Chews						
Toffees, Caramels and Nougat						
Other Sugar Confectionery						
Sugar Confectionery						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2021-2026

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Boiled Sweets	<b>Data removed from sample</b>		
Liquorice			
Lollipops			
Medicated Confectionery			
Mints			
- Power Mints			
- Standard Mints			
Pastilles, Gums, Jellies and Chews			
Toffees, Caramels and Nougat			
Other Sugar Confectionery			
Sugar Confectionery			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 12 Forecast Sales of Sugar Confectionery by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Boiled Sweets	<b>Data removed from sample</b>		
Liquorice			
Lollipops			
Medicated Confectionery			

Mints

- Power Mints

- Standard Mints

Pastilles, Gums, Jellies and Chews

Toffees, Caramels and Nougat

Other Sugar Confectionery

Sugar Confectionery

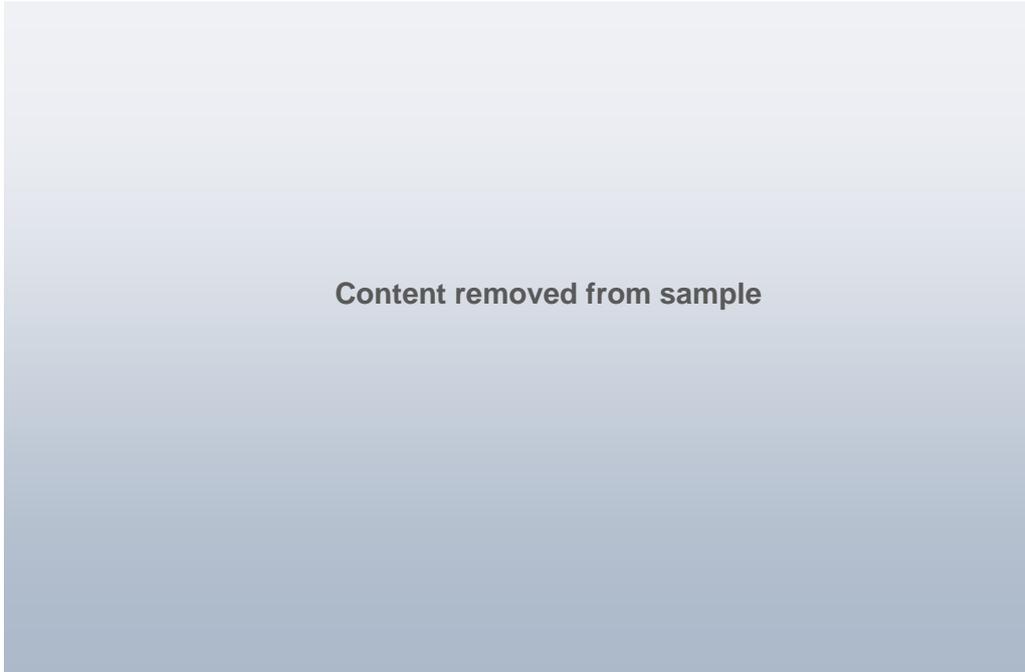
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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

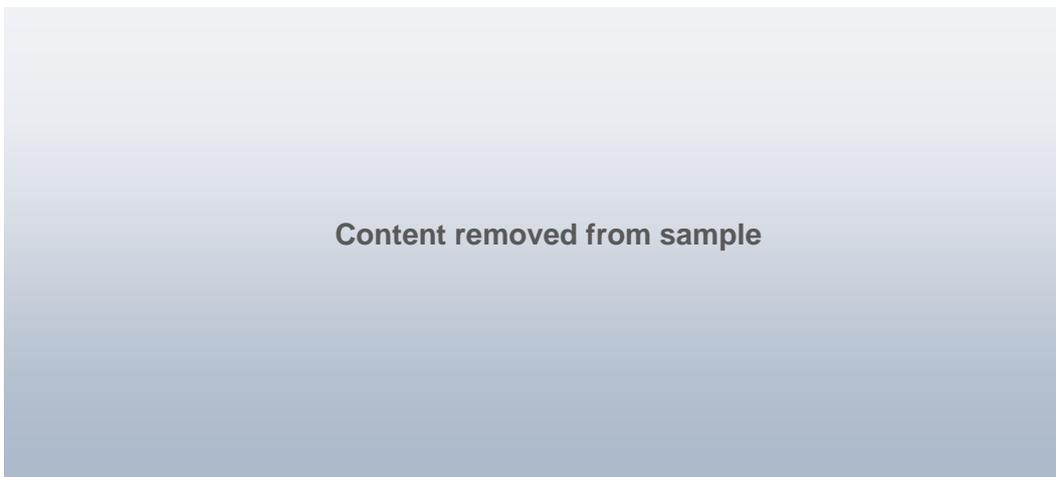
# SNACKS IN TAIWAN - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

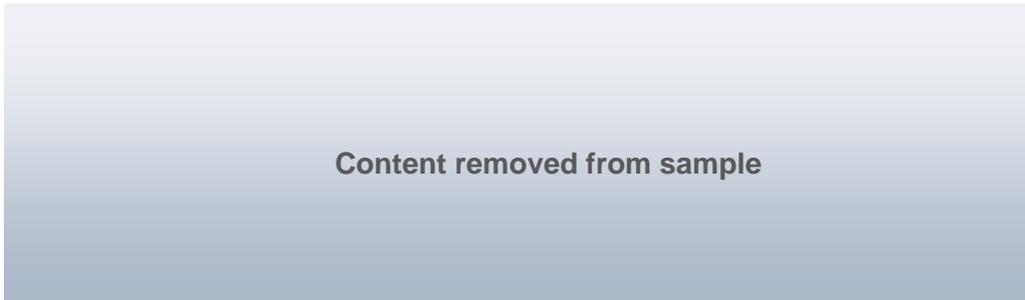
Snacks in 2021: The big picture



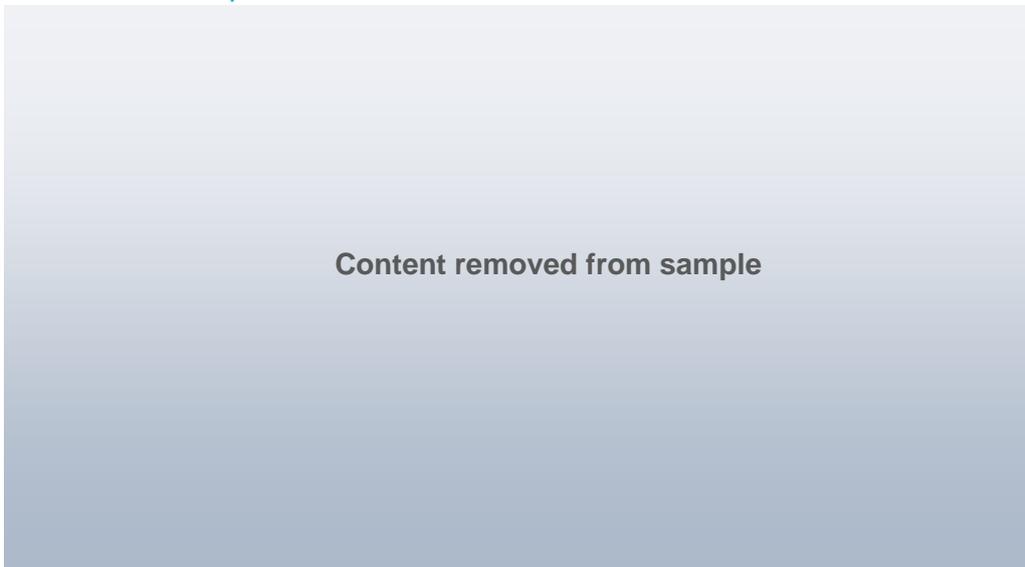
Key trends in 2021



### Competitive landscape



### Channel developments



### What next for snacks?



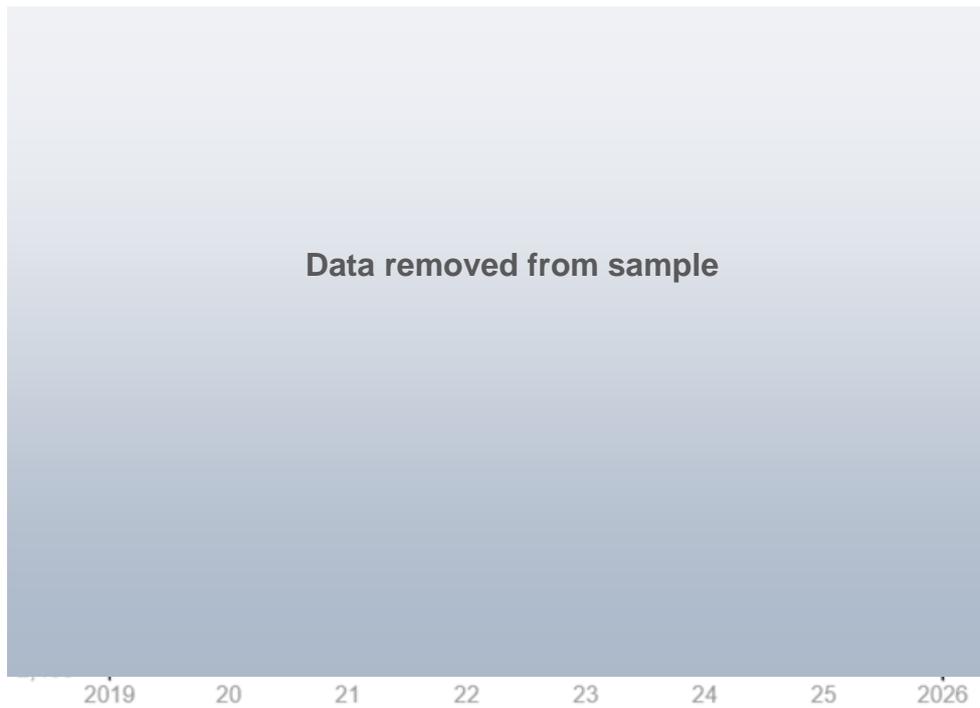
Chart 1 Snacks Value Sales Growth Scenarios: 2019-2026

**Retail Value Sales, Real, US\$ mn, 2019 - 2026**

2021 Constant Prices, 2021 Fixed Year Exchange Rate

**Snacks - Taiwan**

Passport Baseline C19 Pessimistic1



Source: Euromonitor International Industry Forecast Model

Note: C19 Pessimistic 1 represents a modelled scenario with an estimated probability of 25-35% over a 1-year horizon, factoring in macro drivers including GDP, stock prices, business and consumer confidence rates alongside infection rates, supply chain and labour supply disruption rates

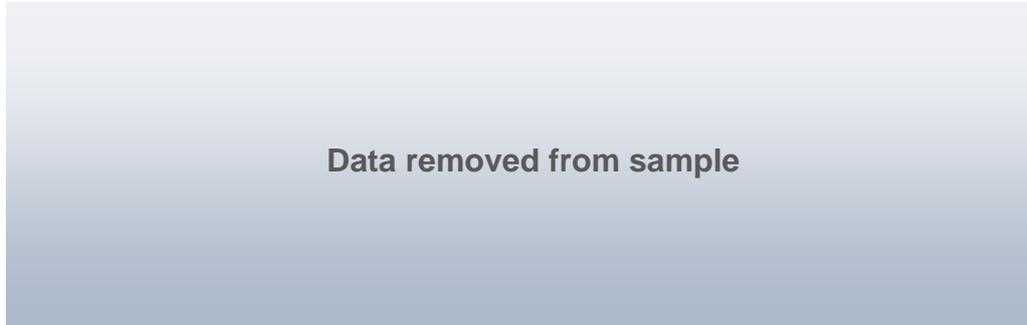
Chart 2 Snacks Impact of Drivers on Value Sales: 2019-2026

**Retail Value Sales, Real US\$ mn 2019 - 2026**  
 2021 Constant Prices, 2021 Fixed Year Exchange Rate

Taiwan - Snacks

**Retail Value Sales, Real Growth**

○ Passport Baseline



(+ Product variety)

Source: Euromonitor International Industry Forecast Model

Note: The above chart shows the growth decomposition split by macro drivers such as GDP per capita and population alongside soft drivers listed as having a positive (+) or negative (-) impact on the total growth rate

**MARKET DATA**

**Table 13 Sales of Snacks by Category: Volume 2016-2021**

'000 tonnes

	2016	2017	2018	2019	2020	2021
Confectionery	<b>Data removed from sample</b>					
Ice Cream and Frozen Desserts						
Savoury Snacks						
Sweet Biscuits, Snack Bars and Fruit Snacks						
Snacks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 14 Sales of Snacks by Category: Value 2016-2021**

TWD million

	2016	2017	2018	2019	2020	2021
Confectionery	<b>Data removed from sample</b>					
Ice Cream and Frozen Desserts						
Savoury Snacks						
Sweet Biscuits, Snack Bars and Fruit Snacks						
Snacks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 15 Sales of Snacks by Category: % Volume Growth 2016-2021**

% volume growth

	2020/21	2016-21 CAGR	2016/21 Total
Confectionery	<b>Data removed from sample</b>		
Ice Cream and Frozen Desserts			
Savoury Snacks			
Sweet Biscuits, Snack Bars and Fruit Snacks			
Snacks			
Snacks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 16 Sales of Snacks by Category: % Value Growth 2016-2021**

% current value growth

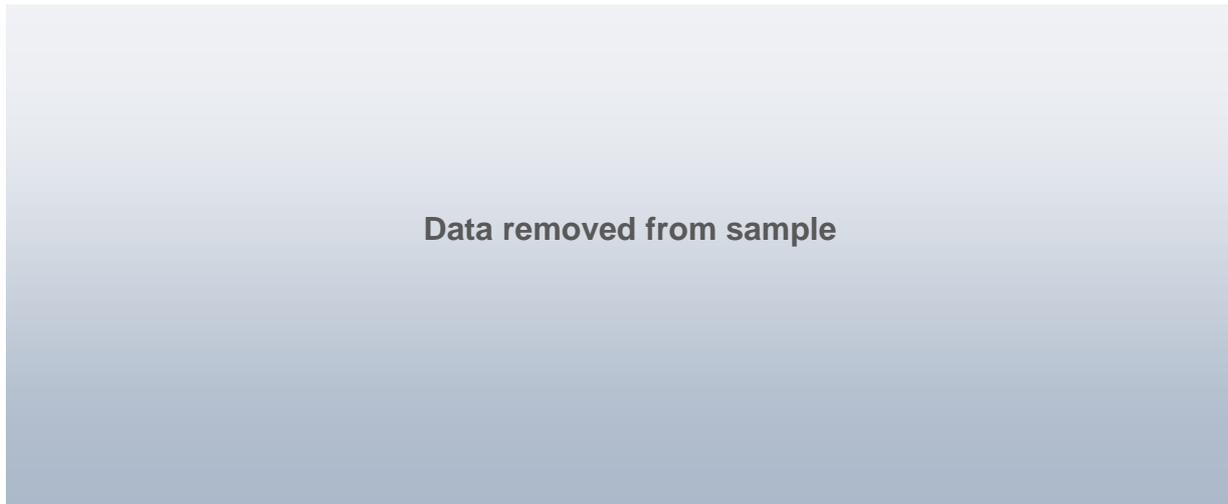
	2020/21	2016-21 CAGR	2016/21 Total
Confectionery	<b>Data removed from sample</b>		
Ice Cream and Frozen Desserts			
Savoury Snacks			
Sweet Biscuits, Snack Bars and Fruit Snacks			
Snacks			
Snacks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 17 NBO Company Shares of Snacks: % Value 2017-2021**

% retail value rsp

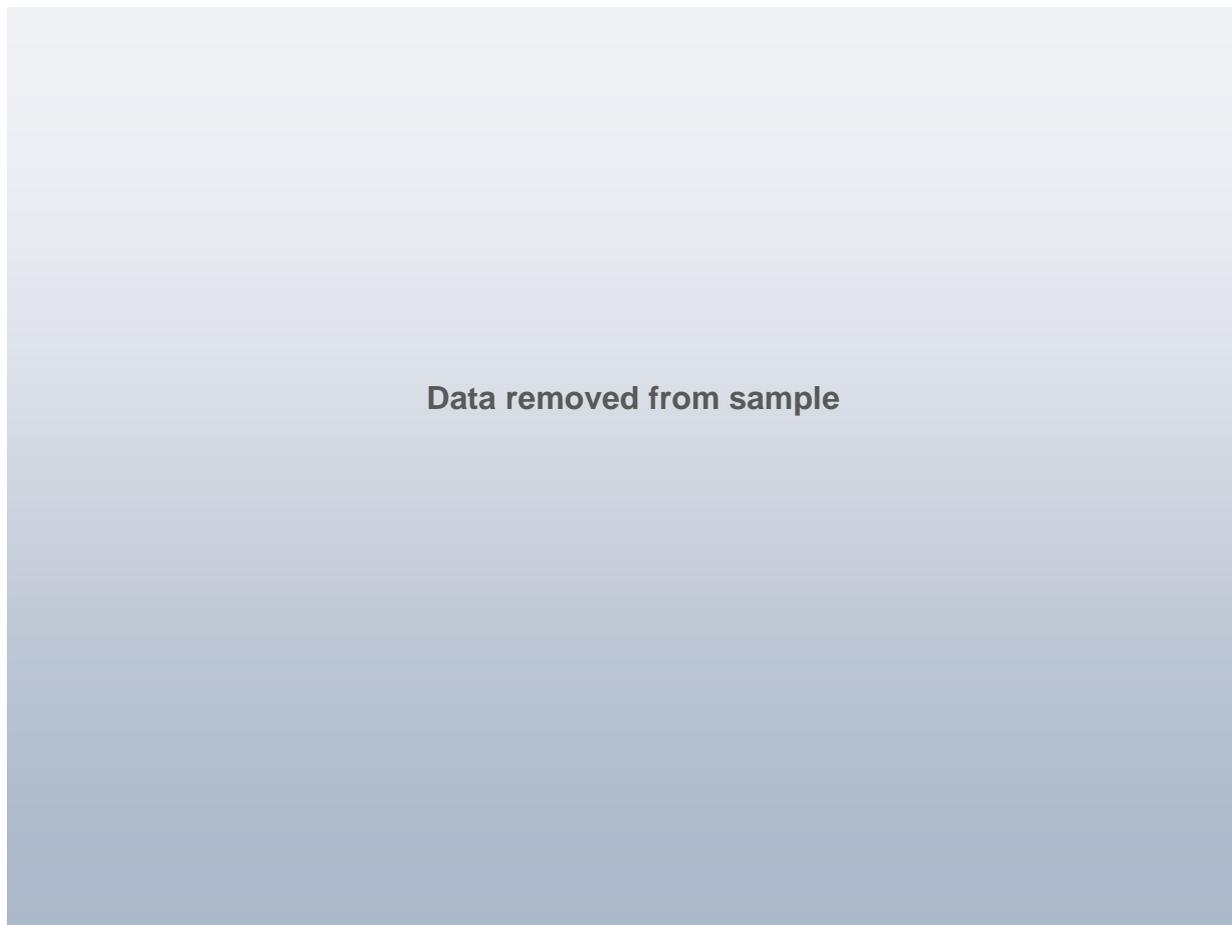
Company	2017	2018	2019	2020	2021
<b>Data removed from sample</b>					



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 18** LBN Brand Shares of Snacks: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 19 Penetration of Private Label by Category: % Value 2016-2021**

% retail value rsp	2016	2017	2018	2019	2020	2021
Ice Cream and Frozen Desserts	<b>Data removed from sample</b>					
Snacks						
Savoury Snacks						
Sweet Biscuits, Snack Bars and Fruit Snacks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 20 Distribution of Snacks by Format: % Value 2016-2021**

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	<b>Data removed from sample</b>					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Non-Grocery Specialists						

- Health and Beauty Specialist Retailers
- Other Foods Non-Grocery Specialists
- Mixed Retailers
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 21 Forecast Sales of Snacks by Category: Volume 2021-2026**

'000 tonnes

	2021	2022	2023	2024	2025	2026
Confectionery	<b>Data removed from sample</b>					
Ice Cream and Frozen Desserts						
Savoury Snacks						
Sweet Biscuits, Snack Bars and Fruit Snacks						
Snacks						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 22 Forecast Sales of Snacks by Category: Value 2021-2026**

TWD million

	2021	2022	2023	2024	2025	2026
Confectionery	<b>Data removed from sample</b>					
Ice Cream and Frozen Desserts						
Savoury Snacks						
Sweet Biscuits, Snack Bars and Fruit Snacks						
Snacks						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 23 Forecast Sales of Snacks by Category: % Volume Growth 2021-2026**

% volume growth

	2021/22	2021-26 CAGR	2021/26 Total
Confectionery	<b>Data removed from sample</b>		
Ice Cream and Frozen Desserts			
Savoury Snacks			
Sweet Biscuits, Snack Bars and Fruit Snacks			
Snacks			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 24 Forecast Sales of Snacks by Category: % Value Growth 2021-2026**

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Confectionery	<b>Data removed from sample</b>		
Ice Cream and Frozen Desserts			
Savoury Snacks			
Sweet Biscuits, Snack Bars and Fruit Snacks			
Snacks			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

## DISCLAIMER

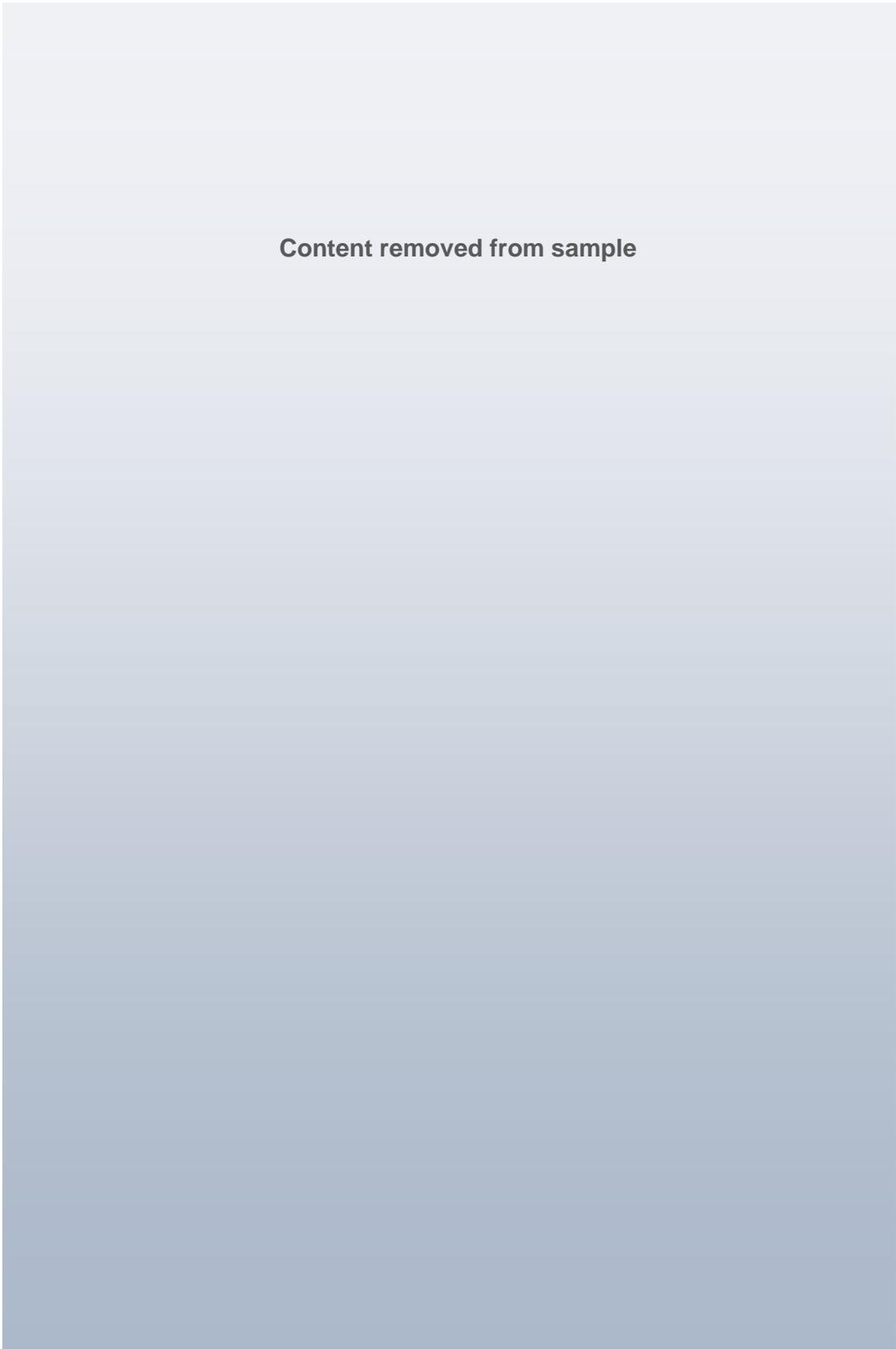
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## SOURCES

Sources used during research include the following:

### Summary 2 Research Sources

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Source: Euromonitor International