

Table 27.4 The world's leading chocolate confectionery markets by volume and value, 2008–2012. Source: Leatherhead Food Research (2011, 2013).

Country	Volume (×1000 tonnes)		Value (US\$m)	
	2008	2012	2008	2012
USA	1680	1725	16 850	17 500
Russia	700	845	6150	7370
Germany	725	670	5900	5700
UK	580	595	6665	6900
Brazil	470	495	4150	4550
France	417	415	3220	3200
Japan	240	255	4795	5150
Italy	235	240	4415	4855
Poland	230	235	1310	1375
Canada	220	225	1650	1725

Besides Russia, growth in chocolate consumption has also been evident in Brazil, which is Latin America's largest market by some distance. In 2012, the Brazilian market was worth 495 000 tonnes, having risen by 5.3% in the years since 2008. Elsewhere, volume sales of chocolate confectionery are currently worth 210 000 tonnes in the developing Indian market and, if present trends continue, the country is set to break into the global top ten at some point in the next few years.

By value, sales of chocolate are also highest in the USA, where the market was worth US\$ 17.5bn in 2012. This figure has increased by a very modest 3.9% compared with 2008, when market value was worth US\$ 16.85bn. Other significant markets for chocolate confectionery in value terms during 2012 included Russia (worth US\$ 7.37bn), the UK (worth US\$ 6.9bn) and Germany (worth US\$ 5.7bn). In many instances, growth in market value has been driven by the trend towards more premium forms of chocolate, as well as higher prices at the retail level.

In per capita terms, consumption of chocolate confectionery is highest amongst Western European countries. Table 27.5 lists the world's top ten chocolate consuming nations – as can be seen, per capita consumption of chocolate is highest in Switzerland, at almost 12 kg. This figure decreases to nearly 10 kg in Ireland and 9.5 kg in the UK. Generally speaking, per capita consumption of chocolate tends to be higher in Europe's more northerly countries.

Outside Europe, per capita consumption is highest in Canada, at 6.4 kg. The country ranks ahead of its southern neighbour by some distance, where 5.5 kg of chocolate is eaten by the average consumer in the USA every year. While per capita levels are also relatively high in both Australia (5.9 kg) and New Zealand (4.8 kg), they lie well below the global average in many less developed economies. The average Indian consumer, for example, eats just 170 g of chocolate per annum, and in China it is even lower at around 100 g.

Table 27.5 The world's leading chocolate consumers in per capita terms (kg), 2012. Source: Leatherhead Food Research (2011, 2013).

Country	Per capita (kg)
Switzerland	11.9
Ireland	9.9
UK	9.5
Austria	8.8
Belgium	8.3
Germany	8.2
Norway	8.0
Denmark	7.5
Canada	6.4
France	6.3

27.5 Reasons for eating confectionery

Confectionery is eaten throughout the world for a variety of reasons, of which gaining pleasure and enjoyment is probably paramount. In most instances, products such as chocolate and sweets represent an affordable treat for adults and children alike, which is why consumer penetration rates tend to be on the high side. Although large quantities of chocolate are bought on impulse, other factors can and do influence purchasing. These reasons are now examined in more detail.

Chocolate has traditionally been viewed as an impulse purchase, most frequently for immediate consumption as a snack. Despite growth in other areas, impulse buying still accounts for a sizeable percentage of purchases within the world chocolate market. It is for this reason that so-called “convenience” channels (e.g. smaller-sized grocery outlets) remain such a strong feature of the market. In the UK, for example, a survey by Shoppercentric (2011) found that chocolate was the third most popular impulse purchase (behind sweets and cakes) amongst shoppers, with 65% of respondents claiming to buy chocolate in this way because “*they fancied it*”.

The widespread popularity of chocolate as a snack can be further illustrated by the results of research carried out by Nielsen (2014) into the global snacking market during 2013. This research – which valued the global snack foods category at US\$ 347bn – found that chocolate was the world's favourite form of snack. According to a poll of 30 000 consumers spread across 60 countries carried out by Nielsen, a leading 15% stated that chocolate was their favourite snack, ahead of yoghurt and bread/sandwiches.

The same study found that almost two-thirds (64%) of consumers had eaten chocolate within the last 30 days, which was marginally higher than the