

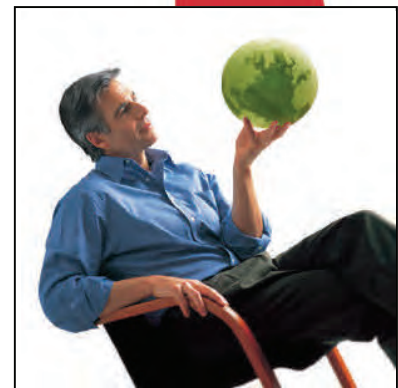


International
Markets
Bureau

MARKET INDICATOR REPORT | APRIL 2013

Analysis of New Maple Products and Ingredients

Europe





▶ EXECUTIVE SUMMARY

This report is meant to highlight potential opportunities for maple products and ingredients in the European market, through an analysis of new syrup introductions in Europe as well as an analysis of new food and beverage products containing maple.

With C\$242.1 million in maple sugar and maple syrup exports, Canada was the largest exporter in the world in 2011.

A number of new syrup products were launched in the European market from January 2011 to August 2012, many focusing on premium, natural and healthy qualities. Organic claims accounted for nearly 30% of all claims used on syrup launches, and were used on nearly half (43.6%) of syrup introductions. Mentions of Canada in maple syrup launches were also fairly common, and included claims of being “Canadian” or “made in Canada” (Mintel, 2012).

Of Canada's top 10 maple sugar and syrup export destinations in 2011, six were European countries. Canada exported C\$44.4 million worth of maple sugar and maple syrup to these six countries in 2011. Of these countries, exports to the United Kingdom (U.K.) experienced the most growth from 2006 to 2011, followed by exports to Denmark, and Germany.

Canada's maple sugar and maple syrup exports to the European Union (E.U.) represented Canada's 15th-largest agri-food export category to the E.U. market in 2011, accounting for 1.3% of agri-food exports (Global Trade Atlas, 2012). Imports of maple sugar and maple syrup into the E.U. face a tariff of 8%, while imports of other maple products that are not 100% maple face higher duties. Maple products are listed as a Canadian agricultural sector that could benefit from tariff reductions under a Comprehensive Economic and Trade Agreement (CETA) with the E.U. (DFAIT, 2012).

Maple syrup has also gone beyond its traditional use as a condiment for pancakes and waffles, and is being used as a natural flavouring ingredient in processed, value-added products. This is evident in new product development, with maple being used in a variety of new food and drink launches in Europe from January 2011 to August 2012, from cold cereals to snack and bakery products, to beverages. Many of these products focused on natural, healthy, and quality attributes (Mintel, 2012).

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▶ **MARKET OVERVIEW**



According to Mintel, the spreads market in Europe, which includes syrups, has continued to grow. Demands for indulgent and comfort products, as well as natural and functional spreads, has fuelled this growth. While sweet spreads have been growing and are a staple among consumers, they are also facing growing competition from breakfast substitutes, such as cereals, as well as evolving consumer trends, such as fewer consumers eating breakfast. To compete, maple syrup suppliers have been working to grow product usage by increasing the diverse use of maple syrup, such as in cooking and baking. New product launches in the market indicate that maple is also being used as an ingredient in a variety of processed products being sold to consumers (Mintel, Sweet and Savoury, Spreads, 2011). For example, United Biscuit’s packaged nuts brand, KP Nuts, a market leader in the U.K., launched a luxury Flavour Nut Selection for Christmas 2009, available in Frosted Vanilla & Cinnamon and Frosted Maple Syrup (Mintel, Seeds and Dried Fruit, 2012). General Mills’ Betty Crocker brand has also introduced a Maple Syrup Cookie Mix to the market (Mintel, Home Baking, 2012). Mintel suggests that using ingredients such as maple sugar and honey to sweeten products, can aid in creating interesting flavours and natural associations for processed products (Mintel, Sugar and Gum, 2012).

Spreads are popular across all age groups in Europe. However, sweet spreads are particularly popular among older generations. There is also growing concern about health and wellness, which is driving new product development in spreads, particularly products that are organic or suitable for certain consumers, such as vegetarians and vegans, or have reduced unhealthy ingredients. Honey, as a sweetener, tends to have a fairly healthy image among consumers, and the same is likely true for maple syrup. The spreads category also tends to benefit from lower price sensitivity with consumers. However, price increases have resulted in some categories becoming overly expensive for consumers, including honey. Maple syrup, while benefitting from the health and wellness and premium trends, may face this challenge (Mintel, Sweet and Savoury Spreads, 2011).

Euromonitor (2012) estimates that the spreads market in Eastern Europe had a retail sales value of US\$1.7 billion in 2012, which is expected to grow to reach US\$2.4 billion in 2017. This represents a compound annual growth rate (CAGR) of 7.5% from 2007 to 2012, and a slightly lower estimated CAGR of 7.0% from 2012 to 2017. The spreads market in Western Europe is significantly larger than that of Eastern Europe, but has been growing at a slower rate. The market was estimated to have a value of nearly US\$8.6 billion in 2012; that will grow to reach US\$10.2 billion in 2017. This represents a CAGR of 3.4% from 2007 to 2012, and a slightly higher CAGR of 3.7% for the future (2012 to 2017).

Maple Syrup-Related Packaged Food Market Sizes in Europe
Historic/Forecast Retail Value Current Prices at Fixed 2012 Exchange Rates - US\$ Millions

Categories	2007	2008	2009	2010	2011	2012*	2017
Eastern Europe							
Packaged food	118,786.6	135,865.1	144,258.5	155,855.9	170,040.4	183,971.4	257,428.8
Spreads	1,194.9	1,319.1	1,352.9	1,444.1	1,595.4	1,715.3	2,405.3
Honey	332.7	357.8	364.0	384.5	416.1	438.8	601.0
Western Europe							
Packaged food	529,863.2	552,244.9	561,348.3	568,920.6	581,568.7	594,079.9	670,818.3
Spreads	7,220.5	7,503.1	7,785.9	7,946.7	8,233.0	8,551.7	10,235.0
Honey	2,051.5	2,063.6	2,226.4	2,345.8	2,446.9	2,574.4	3,265.2

Source: Euromonitor, 2012.
 *All 2012 data is provisional and based on part-year estimates.

▶ MAPLE SUGAR AND MAPLE SYRUP TRADE DATA



World exports of maple sugar and syrup have grown by 22.9% from 2006 to 2010. Canada is the largest maple sugar and syrup exporter in the world, with export growth of 27% from 2006 to 2011. While Germany, the U.K., France and Denmark are all significant maple sugar and syrup importers, they also rank among the top 10 exporters in the world of maple sugar and maple syrup.

Canada's maple sugar and maple syrup exports to Europe in 2011 were \$48.3 million, with the E.U. 27 the destination for nearly all these exports (\$46.0 million). Maple sugar and maple syrup exports from Canada to Europe increased 75.1% from 2006 to 2011, while exports to the E.U. had slightly greater growth of 81.1%.

Maple Sugar and Maple Syrup: Canada's Top 10 Export Destinations – C\$

Country	2006	2007	2008	2009	2010	2011
United States	137,150,898	153,101,334	156,029,130	167,867,668	142,993,460	150,953,142
Japan	19,028,940	20,752,812	24,612,437	21,669,051	28,092,909	26,531,915
Germany	11,011,261	15,874,924	15,478,107	16,414,931	16,224,744	17,685,013
United Kingdom	3,604,337	4,323,698	10,130,850	13,069,021	9,593,150	10,619,609
France	5,152,740	5,319,941	6,201,111	8,289,540	7,580,222	8,239,246
Australia	3,781,519	4,817,936	5,400,626	8,129,652	6,883,308	6,772,623
South Korea	1,035,198	2,026,880	1,697,885	2,066,720	2,941,053	5,657,799
Denmark	2,160,102	2,489,716	3,609,875	4,257,666	4,130,080	4,045,516
Switzerland	1,993,662	2,145,845	2,258,390	2,115,704	2,741,707	1,931,567
Netherlands	1,662,804	1,882,430	1,755,093	2,132,899	2,244,257	1,911,183
World total	190,623,784	217,630,992	233,738,849	252,728,165	231,298,213	242,120,927

Source: Global Trade Atlas, 2012. *Ranking is based on 2011 data. Variation between Canada's reporting of exports and other countries' reporting of imports is likely due to differing reporting methods, such as valuation.

Overall, world imports of maple sugar and maple syrup increased by 16.8% from 2006 to 2010. Within the top 10 importing countries, all the European countries had positive import growth from 2006 to 2011. France's imports of maple sugar and syrup grew by 64.4%; Germany experienced growth of 54.0%; the U.K. increased by 21.0%; Switzerland by 11.8%; and Denmark by 5.7%. Of the top 10 importers, South Korea experienced the most growth, with maple sugar and maple syrup imports increasing 223.9%.

Maple Sugar and Maple Syrup: Top 10 Importing Markets in the World – C\$

Country	2006	2007	2008	2009	2010	2011
United States	136,427,510	152,365,604	155,239,947	167,282,143	142,298,991	150,199,347
Japan	24,022,030	26,302,031	33,614,659	27,000,012	34,302,298	31,280,899
Germany	12,616,154	16,892,556	16,132,157	17,611,580	18,112,158	19,435,155
United Kingdom	10,294,588	13,371,471	11,745,806	15,758,350	12,119,029	12,458,955
France	5,546,253	5,829,207	9,915,791	9,220,253	9,169,221	9,115,408
Canada	5,274,375	1,210,176	5,550,623	10,311,288	8,653,277	11,316,913
Australia	3,387,921	4,819,946	5,702,336	8,658,552	5,855,267	9,592,232
Denmark	3,789,697	4,971,507	4,772,682	4,864,365	4,979,047	4,007,512
South Korea	1,609,467	2,702,583	3,145,151	2,592,637	3,277,333	5,212,736
Switzerland	2,020,034	1,971,835	3,235,403	3,739,550	3,209,517	2,257,420
World total	228,074,289	253,132,426	273,937,011	297,675,643	266,370,132	279,953,035

Source: Global Trade Atlas, 2012. *Ranking is based on 2011 data. Variation between Canada's reporting of exports and other countries' reporting of imports is likely due to differing reporting methods, such as valuation.

► SYRUPS



According to Mintel's Global New Products Database (GNPD), 117 syrup products were introduced to the European market from January 2011 to August 2012. Of these syrup introductions, 92 were completely new products, and 15 were new variety/range extensions, while nine products had new packaging and one product was a re-launch. In 2011, 61 syrups were introduced to the European market, while 56 syrup introductions were made from January to August 2012.

Of syrup introductions from January 2011 to August 2012, 20 were maple syrups, and seven of these identified being Canadian in their product title. Prices for new syrup products ranged from US\$0.01/ml to US\$0.07/ml, with the most expensive being a certified kosher and organic 100% pure Class A syrup, made in Canada, that is suitable for vegans.

Of European countries, Germany had, by far, the most syrup launches from January 2011 to August 2012, representing 26.5% of syrup introductions in Europe, followed by Spain (17.9% of introductions), Finland (14.5%), and France and the U.K. (9.4% each). Of maple syrups, Germany had four launches, Italy and the U.K. three each, and the Czech Republic, France, and Spain two each.

Leading Companies

Syrup introductions in Europe are fairly dispersed among brands and companies, with the top 10 companies accounting for 33.3% of syrup introductions. The company with the most syrup launches in Europe, from January 2011 to August 2012, was **Abaliment**. Syrup launches from this company included a range of strawberry, toffee, chocolate, and vanilla syrups in Spain.

El Corte Inglés was the company with the second-most syrup launches, which included two agave syrups, one of which was organic, and a range of maple, strawberry and toffee syrups. These products were also from Spain.

Another range of syrups was launched by **Hero** in Germany, which had the third-most syrup introductions in Europe. This range included a variety of flavours such as nut, vanilla, chai, hazelnut and caramel syrups. Syrup launches by **Laboratorios Almond** included two agave syrups, one organic rice syrup, and an organic fruit syrup in the markets of Spain and France. The company **Riipisen Riistaherkut** also launched some interesting syrups (spruce shoot, blueberry and cloudberry) in Finland, that can be added to drinks.

New Syrup Introductions in Europe – January 2011 to August 2012 by Country

Country	Number of New Syrup Products
Germany	31
Spain	21
Finland	17
France	11
United Kingdom	11
Czech Republic	5
Netherlands	5
Turkey	5
Italy	4
Poland	3
Belgium	1
Denmark	1
Portugal	1
Russia	1
Total	117

New Syrup Introductions in Europe – January 2011 to August 2012 by Brand Owner

Ultimate Company	Brand(s)	New Syrup Products
Abaliment	Betania	7
El Corte Inglés	El Corte Inglés, El Corte Inglés Special Line, and Hipercor Special Line	5
Hero	Schwartau	5
Laboratorios Almond	NaturGreen	4
Riipisen Riistaherkut	Riipisen	3
Piccolo-Systems	Berrier	3
Vuokatin Viini	Vuokatin Viini	3
Tate & Lyle	Lyle's Golden Syrup, and Lyle's Squeezy Syrup	3
Bio Nebio	Bio Kvalita, Bio Nebio, and Nase Bio	3
Voelkel	Voelkel Vollfrucht	3
Other companies	Other brands	78
Total		117

Source for both: Mintel, 2012.

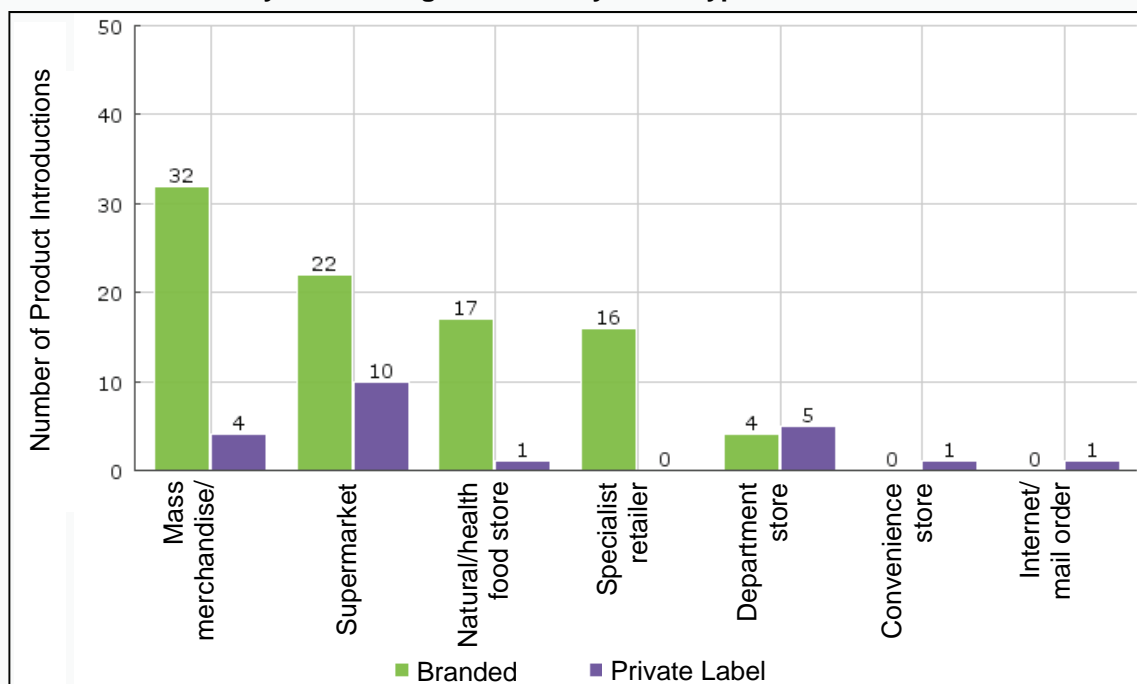
► SYRUPS (continued)



Distribution

The majority of new syrup launches were located in mass merchandisers (roughly 30% of syrup launches), followed closely by supermarkets (27.4%). However, natural/health food stores and specialist retailers also offered a number of new syrup products. Of syrup introductions, roughly 18% were private label products, with certain store types having a greater presence of new private label syrup products. Supermarkets had the highest proportion, with private label syrups accounting for 31.3% of syrup introductions found in supermarkets. Some products are also imported in bulk from Canada and bottled in Europe, then sold under private label.

**New Syrup Product Introductions in Europe
January 2011 to August 2012 – By Store Type and Private Label**



Source: Mintel, 2012.

*Product introductions do not equal 117 as the store type for each introduction was not available.

Packaging

The most common package size for syrup product launches was 250 ml and was sold at supermarkets, specialist retailers, and mass merchandise/hypermarkets. The majority of 350 g sizes (the second-most commonly used in syrup launches), were found at specialist retailers. While most stores carried some variety of package size, the 200 ml size (the third-most commonly used in syrup introductions) was only found in mass merchandise/hypermarkets.

The most popular package type for syrup launches in Europe is clearly a bottle format, accounting for nearly three-quarters of launches. As for packaging material, plain glass is, by far, the most common among syrup launches, accounting for 61% of launches, followed by Plastic Polyethylene Terephthalate (PET) (21%), and unspecified plastic (11%).

**New Syrup Product Introductions
in Europe – January 2011 to
August 2012 by Package**

Package Type	New Syrup Products
Bottle	85
Jar	19
Tottle*	8
Can	2
Flexible	1
Tube	1

Source: Mintel, 2012.

*A tottle is an upside down tube/bottle that has a flat top/cap at the bottom.

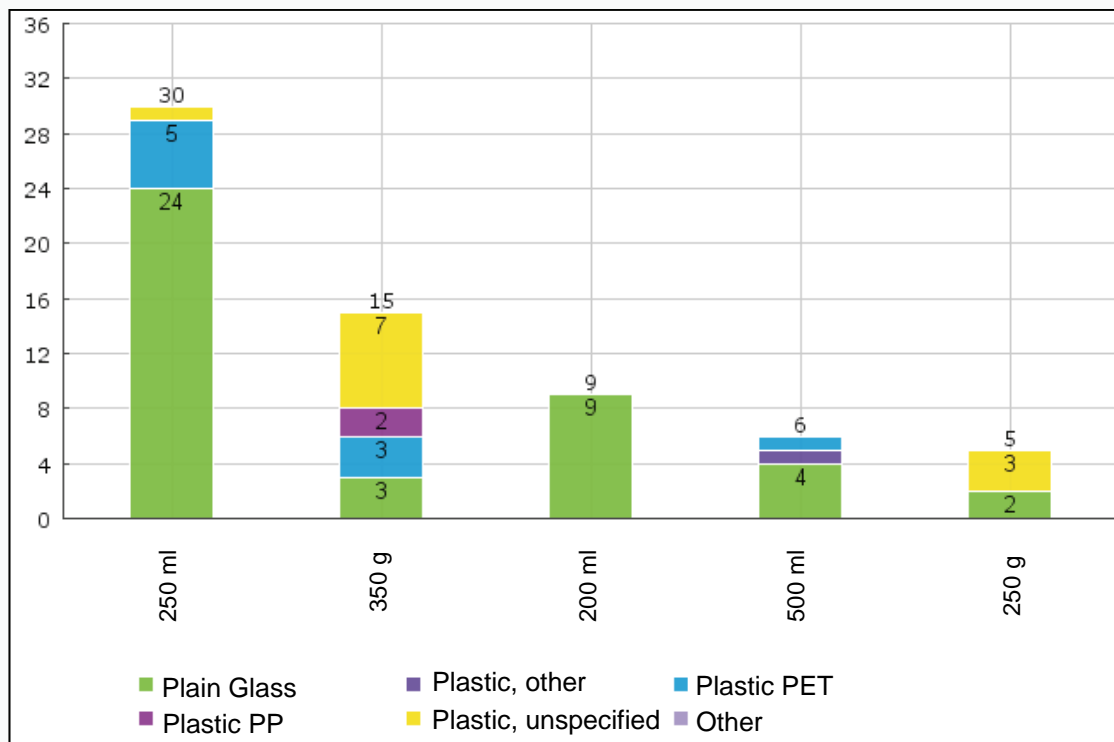
► SYRUPS (continued)



Among 250 ml containers, plain glass is notably the most commonly used packaging. However, for a 350 g syrup size, unspecified plastic is most commonly used, with plastic PET, plain glass, and plastic Polypropylene (PP) also used. All syrup introductions for 200 ml-sized products used plain glass packaging, as did the majority of 500 ml products.

Easy-to-use products were a focus for packaging development. Packages that allowed consumers to easily pour syrup were evident. These included streamlined shapes with snap-open caps, as well as non-drip packaging. However, new packaging shapes were not very prominent in maple syrup launches, which more closely followed the traditional maple syrup packaging of a rounded bottle with a handle and twist cap.

**New Syrup Introductions in Europe
– January 2011 to August 2012 by Package Material and Pack Size**



Source: Mintel, 2012.
Note: Plastic PP (Polypropylene), Plastic PET (Polyethylene Terephthalate).

Certain package sizes do seem to be more commonly used in different countries. Within Germany, the majority of syrup introductions from January 2011 to August 2012 used a 250 ml size, followed by 200 ml and 500 ml sizes. Most cash and carry stores in Germany would also offer 1-litre jars for foodservice customers. Syrup introductions in Spain were mainly 350 g, with 250 g and 360 g sizes also commonly used. The most common sizes in Finland were 250 ml, 215 ml, and 200 ml, while in the U.K. the most common sizes were 250 ml, 350 g, and 454 g. Syrup launches in other countries were widely dispersed among different sizes. However, in the Czech Republic three of five syrup introductions were in a 250 ml format.

► **SYRUPS (continued)**



Claims

Organic was the most commonly used claim on syrup introductions in Europe from January 2011 to August 2012. Organic claims accounted for nearly 30% of all claims used on new syrup products, and were used on nearly half (43.6%) of syrup introductions.

The most common type of organic syrup introductions were agave syrups, which tend to compete with organic maple syrups in the market. However, maple syrup products had the second-most organic claims, with nine organic products. Other organic syrup introductions included: fruit, blueberry, cranberry, aronia and date syrups; rice and spelt syrups; and molasses, caramel and ginger syrups.

Other environmentally friendly, natural and health-related claims were also commonly used on syrup launches, such as: no additives/preservatives (7.9% of claims), low/no/reduced glycemic (7.3%), gluten-free (5.1%), and low/no/reduced allergen (5.1%). Lifestyle related claims were also common, with vegetarian, kosher, no animal ingredients, and vegan claims also among the top 10 claims used on syrup introductions.

Looking more generally at the types of claims used, natural claims, such as organic, no additives/preservatives, and all-natural product, were most commonly used. Natural claims were used 64 times on new product launches, while claims that related to a reduction (minus claims) were the second-most commonly used. Minus claims, such as low/no/reduced claims, were used 19 times on syrup introductions, while suitable types of claims, such as claims for certain types of consumers (vegetarians, vegans, diabetics, etc.) were also used 19 times.

**New Syrup Product Introductions in Europe
January 2011 to August 2012 - By Claim**

Top Claims	New Syrup Products
Organic	51
No additives/preservatives	14
Low/no/reduced glycemic	13
Gluten-free	9
Low/no/reduced allergen	9
Ethical - environmentally friendly package	8
Vegetarian	8
Kosher	6
Low/no/reduced sugar	6
No animal ingredients	6
Vegan	6
Other claims	47
Total claims	177*

Source: Mintel, 2012. *Total claims do not add up to 117 as more than one claim can be used on a product.

- According to Mintel, from September to December 2012, an additional 31 syrup products were introduced to the European market. These included a number of agave syrups, six maple syrup products, and a variety of other syrups. All of the six maple syrup introductions were identified as being Canadian/from Canada.
- Organic was the most common claim used for these syrup launches. Two maple syrup products were organic, and were located in the markets of Germany and Norway. The other four maple syrup introductions were launched in the U.K. (three products) and France.



Organic Maple Syrup
(organic cultivation from Canada)



Organic Agave Syrup
(with an easy-to-close pack)

Source for both: Mintel, 2012.

▶ SYRUPS (continued)



New Product Examples

Below are examples of new maple syrup products introduced to the European market from January 2011 to December 2012. Many of the syrup products promoted as Canadian or from Canada also highlighted high quality aspects, such as being organic, natural/healthy, and premium.

Another method for differentiating syrup products in the market appears to be through highlighting the many innovative ways in which maple syrup can be used, not only on pancakes, but also on cereal, fruit salads, as a salad dressing, in beverages and yogurt, as a meat flavouring, or as a sugar substitute/sweetener in recipes. New syrup flavours, such as blueberry and butter pecan syrups, are also providing growing diversity to consumers.



Pure Canadian No. 1 Light Maple Syrup

Country: United Kingdom
Company: Tesco
Brand: Tesco Finest (private label)
Store name: Tesco Extra
Store type: Mass merchandise/hypermarket
Date published: August 2012

This new product is described as being a “Pure Canadian No. 1 Light Maple Syrup” from Quebec, and retails in a 330 g plain glass bottle. This product’s claims include: ethical – environmentally friendly package, low/no reduced sugar, premium, vegetarian.

Canadian Maple Syrup

Country: France
Company: 1.2.3. Bio
Brand: 1.2.3. Bio
Store name: Carrefour
Store type: Mass merchandise/hypermarket
Date published: August 2011

This new product is described as being a grade C, spicy syrup from Canada, with a lightly caramel flavour, that is certified organic. Some interesting uses are also mentioned, such as with yogurt, or with fresh fruit or ice cream. The retail format is a 250 ml plain glass bottle.



Maple Syrup

Country: Finland
Company: TerraSana
Brand: TerraSana
Store name: K-Citymarket
Store type: Mass merchandise/hypermarket
Date published: December 2011

This new product is described as a 100% pure Class A syrup made in Canada, which retails in a 330 g plain glass bottle. Claims for this product include: kosher, no animal ingredients, organic, vegan.

Maple Syrup

Country: Italy
Company: Lune de Miel
Brand: Maple Joe
Store name: Unes
Store type: Supermarket
Date published: February 2012

This new product is described as being a pure Canadian product, and retails in a 250 g plain glass bottle. A variety of ways to use this product are also highlighted, such as for sweetening beverages, pouring on crêpes, cereal, yogurts and fruit, as a flavouring for pork, goat and chicken meat.



Source for all: Mintel, 2012.

► SYRUPS (continued)



Canadian Maple Syrup

Country: Germany
Company: Kaiser's Tengelmann
Brand: Naturkind (private label)
Store name: Kaiser's
Store type: Supermarket
Date published: December 2011

This product has been re-packaged in a newly designed 250 ml plain glass bottle. It is described as an organic certified class A syrup and is recommended to be served with pancakes and muesli, as well as with a variety of other dishes.

Organic Maple Syrup

Country: Germany
Company: Bio-Zentrale
Brand: Bio Zentrale
Store name: Kaiser's
Store type: Supermarket
Date published: July 2011

This new product is described as being 100% Canadian and certified organic. It retails in a 250 ml plain glass bottle.



Organic Grade A Maple Syrup

Country: Italy
Company: Vita+ Naturprodukte
Brand: Verival Bio
Store name: Carrefour
Store type: Mass merchandise/hypermarket
Date published: June 2012

This new product is said to be produced from juice from the sugar maple tree, and has a light colour and mild taste. It is described as being suitable as a sweetener for yogurt, ice cream and fruit salad, and retails in a 250 ml plain glass bottle.

Organic Canadian Maple Syrup

Country: Netherlands
Company: Faan Wolvega
Brand: Bio Fan
Store name: Albert Heijn
Store type: Supermarket
Date published: May 2012

This new product claims to be organic and retails in a 250 ml plain glass bottle.



Organic Blueberry Syrup

Country: Denmark
Company: Urtekram
Brand: Urtekram
Store name: Netto
Store type: Supermarket
Date published: October 2011

This new product is described as being a "seductive dream syrup, with a delicate and aromatic taste". It is made with wild blueberries and maple syrup from Quebec. This product claims to be organic, features the Debio and KRAV organic certification logos, and retails in a 250 ml plain glass bottle.

Source for all: Mintel, 2012.

▶ **MAPLE AS A PREMIUM INGREDIENT**



Maple syrup is being used as an ingredient in a wide variety of food and beverage products in Europe. Maple producers have also been innovating from to create new maple syrup-based formats that will catch the attention of consumers. Health trends and demand for natural ingredients and products, will likely support future growth in these areas.

According to Mintel, 194 new food and beverage products were introduced to the European market from January 2011 to August 2012, with at least one product within a range that contains/mentions maple.* *For the remainder of this report, these products will be referred to as "maple products."* Please note that this does not include syrup products, as they have already been analyzed in earlier sections of this report.

The U.K. had, by far, the most new maple product* launches in Europe, with over half (52.1%) of new launches, followed by Germany with 18.6% of new maple launches, and France with 6.2%. The U.K. had 63 maple product launches in 2011, and 38 launches as of August 2012. Germany had only 10 launches in 2011, but as of August 2012, already had 26 launches in 2012.

Leading Companies

Wal-Mart launched the most maple products in Europe from January 2011 to August 2012, with 27 products, accounting for 13.9% of all maple product launches. These products were all under the Asda brand, and consisted of cold cereal, cupcake, sauce, and cheese products.

Tesco had the second-most launches, accounting for 10.3% of product introductions. Products largely consisted of pastry dishes, such as Maple Bacon and Gruyère Quiche, instant porridge, maple granola bars, and chocolate containing maple syrup caramelized walnut pieces.

Unilever accounted for the third-most launches (8.8% of all launches). These included dairy-based frozen products, such as ice cream containing maple syrup, and a range of teas, including an apple and maple-flavoured tea.

New Maple Product Introductions in Europe – January 2011 to August 2012 by Country**

Country	Number of New Maple Products
United Kingdom	101
Germany	36
France	12
Ireland	8
Poland	8
Sweden	8
Finland	6
Russia	4
Austria	3
Italy	3
Norway	3
Denmark	1
Switzerland	1
Total	194

New Maple Product Introductions by in Europe – January 2011 to August 2012 by Brand Owner**

Ultimate Company	Brand(s)	New Maple Products*
Wal-Mart	Asda Chosen By You	27
Tesco	Country Barn	1
	Tesco	8
	Tesco Finest	11
Unilever	Langnese Cremissimo	1
	Eskimo Cremissimo	3
	Lipton	6
	Ben & Jerry's	7
LSP Sporternahrung	Oat King	16
Nestlé	Mövenpick	3
	Mövenpick Classics	6
Morrisons	M Kitchen Bistro	1
	Morrisons	7
Bremer Hachez Chocolate	Hachez Braune Blätter	6
Border Biscuits	Border Biscuits Gourmet Goodness	6
Potts Partnership	Owen Potts'	5
Maple Leaf Bakery	New York Bakery Co	5
Other companies	Other brands	75
Total		194

Source for both: Mintel, 2012. ****Not including syrups, and with at least one product variety in a range having a maple mention.**

*Mintel tabulates the number of products based on whether maple is mentioned on product labelling, and also includes other varieties in the same product range.

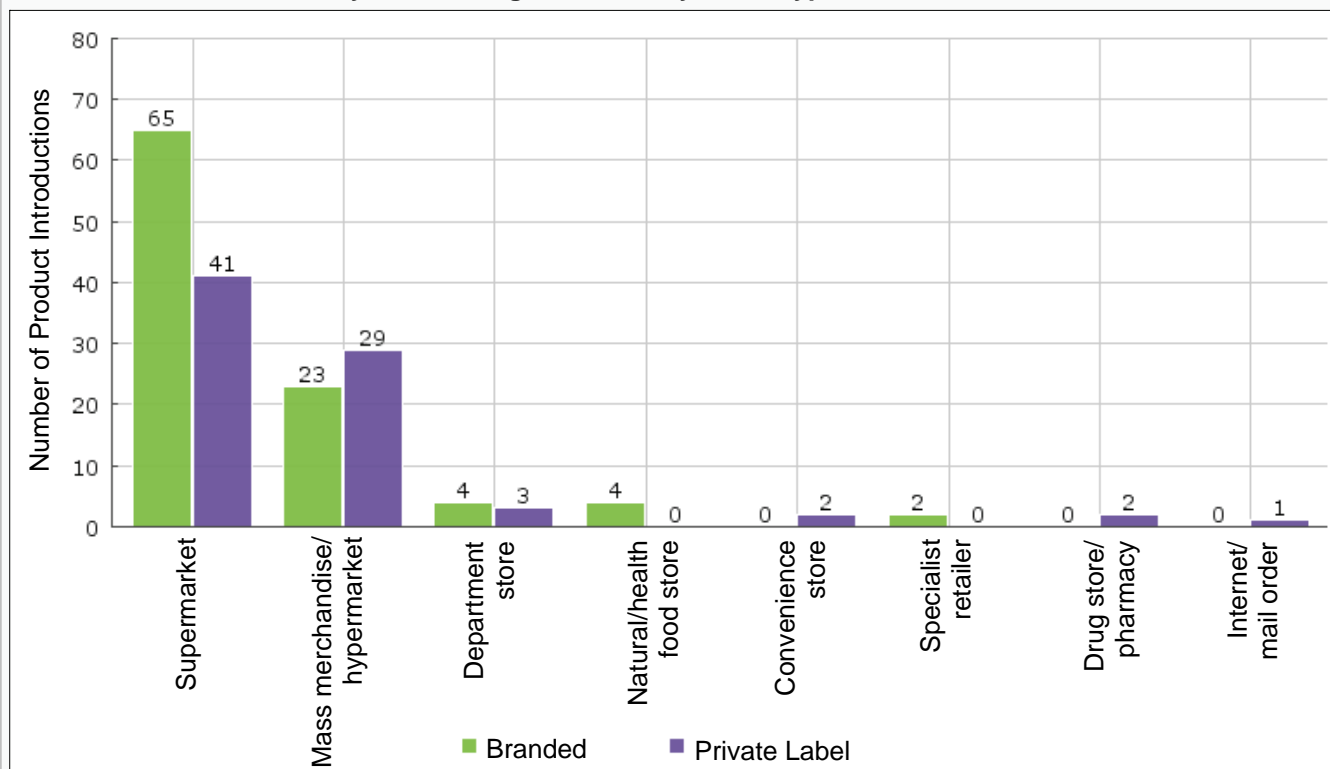
▶ **MAPLE AS A PREMIUM INGREDIENT (continued)**



Distribution

Supermarkets were the most common store format for maple product* introductions in Europe, from January 2011 to August 2012, accounting for more than half of all maple launches. While the majority of new maple products in supermarkets were brands, nearly 40% were private label products. Mass merchandise/hypermarket channels were the second-most common, representing 26.8% of maple launches in Europe, with private label introductions actually accounting for a greater proportion (55.8%) than branded products.

**New Maple Product* Introductions in Europe
January 2011 to August 2012 – By Store Type** and Private Label**



Source: Mintel, 2012.

*Not including syrups, and with at least one product variety in a range having a maple mention.

**Product introductions do not equal 117 as the store type for each introduction was not available.

New products found in supermarkets were largely pastry dishes, accounting for 24 products, dairy-based frozen desserts (18 products), and sweet biscuits/cookies, table sauces, and tea (six products each). Of new products found in mass merchandise/hypermarket channels, there were 15 cold cereal products, seven chocolate piece products, and six each of cheese and dairy-based frozen products.

The most commonly used claims on new maple products found in supermarkets, were environmentally friendly claims, followed by vegetarian and premium claims. Among new maple products at mass merchandise/hypermarket channels, the most used claims were premium claims, followed by vegetarian and no additive/preservative claims.

▶ **MAPLE AS A PREMIUM INGREDIENT (continued)**



Claims

While the country origin of maple syrup ingredients was not visible on the majority of new products, some did make reference to Canada through titles or imagery. For example, a maple nut cereal featured a picture of a maple syrup bottle with a Canadian flag on its packaging. Trade Commissioners advise that highlighting the Canadian origin of maple syrup through a Canada Brand maple leaf offers interesting and positive opportunities in the German market, as there are investments being made to promote Canadian products in 2013 and 2014.

There were 389 claims made on maple products* introduced to the European market from January 2011 to August 2012. Of all claims for new maple launches, the most common types were claims suitable for certain consumers (such as for vegetarian or vegan consumers), followed by ethical and environmental claims (such as fair trade, sustainable), positioning claims (such as premium), natural claims, and minus claims (such as low/no/reduced sugar, no additives/preservatives).

Of specific claims, vegetarian claims were the most commonly used, accounting for roughly 15% of all claims, and were particularly used for: cold cereals; dairy-based frozen products; cakes, pastries and sweet goods; and cheese products.

Eco-friendly packaging was the second-most commonly used claim, accounting for 12.1% of all claims. This type of claim was most frequently used on pastry dishes, sweet biscuits/cookies, and tea products. The third-most common claim was “premium,” representing 11.1% of all claims. This claim was particularly used for cold cereals, followed by pastry dishes and dairy-based frozen products.



New Maple Product* Introductions in Europe – January 2011 to August 2012 by Claim

Claims	New Maple Products
Vegetarian	55
Eco-friendly package	47
Premium	42
No additives/preservatives	33
Low/no/reduced trans fat	15
Low/no/reduced sugar	15
Ethical - animal	14
Vegan	13
Low/no/reduced allergen	12
No animal ingredients	11
Ease of use	9
Other claims	47
Total claims	127**

Source: Mintel, 2012.

*Not including syrups, and with at least one product variety in a range having a maple mention.

**Total claims do not add up to 117 as more than one claim can be used on a product.

Pulsin' Maple and Peanut Protein Bar

Launched in Finland in March 2011, this product claims to be high-fibre, vegan, organic, and premium, as well as free from added sugar, dairy, gluten, soy, trans-fats and genetically modified ingredients.

Source: Mintel, 2012.

▶ **MAPLE AS A PREMIUM INGREDIENT (continued)**



Sub-Categories

New launches containing maple included products across a wide range of categories, with cold cereals representing the most maple product launches. A number of cereals contained the word “maple” in the product title, such as “Pecan & Maple Crisp Cereal.” Of 28 new cold cereal launches, 24 were launched in the U.K. market.

Product categories that had the largest number of claims included: snack/cereal/energy bars; cold cereals; pastry dishes; dairy-based frozen products; and sweet biscuits/cookies.

New pastry dishes had the second-most launches, the vast majority being quiche products. The U.K. market also accounted for nearly all of these launches, representing 23 of a total 26 pastry dish products. However, Germany accounted for the majority of snack/cereal/energy bar launches, with 16 of the 25 launches in Europe.



**Sainsbury's Taste the Difference
Canadian Maple Roasted Nut Collection**

Released in the United Kingdom in 2011, this premium-positioned snack product falls under the sub-category of nuts.

Source: Mintel, 2012.

**New Maple Product* Introductions
in Europe – January 2011 to
August 2012 by Sub-Category**

Sub-Categories	New Maple Products
Cold cereals	28
Pastry dishes	26
Snack/cereal/energy bars	25
Dairy-based frozen products	23
Cakes, pastries & sweet goods	11
Sweet biscuits/cookies	11
Non-individually wrapped chocolate pieces	7
Hard & semi-hard cheeses	6
Table sauces	6
Tea	6
Other sub-categories	45
Total products	194**

Source: Mintel, 2012.

**Not including syrups, and with at least one product variety in a range having a maple mention.*

***Total claims do not add up to 117 as more than one claim can be used on a product.*

- ▶ According to Mintel, an additional 76 food and beverage maple products (not including syrups) were launched from September to December 2012. The majority of these were dairy-based frozen products, followed by cold cereals, and cakes, pastries and sweet goods.
- ▶ The top claims on these product introductions were environmentally friendly package, low/no/reduced allergens, and vegetarian. Organic was the ninth-most commonly used claim, while premium ranked sixteenth as a claim.

▶ MAPLE AS A PREMIUM INGREDIENT (continued)



New Product Examples

Food and beverage product launches (not including syrups) in Europe from January 2011 to December 2012, spanned a range of sub-categories. Below are examples of these products, highlighting the diversity of products using maple ingredients and their positioning in the market (Mintel, 2012).

Maple Frosted Organic Flakes

Country: Greece

Company: Whole Earth Foods

Brand: Whole Earth

Sub-category: Cold cereals

Store name: Prasino

Store type: Natural/health food store

Date published: November 2012

This new organic product is described as lightly frosted corn flakes with Canadian maple syrup, and features a variety of claims, from environmentally friendly, to gluten-free and low/no/reduced fats, to being suitable for vegans and vegetarians.



Canadian Berries Cranberry Sauce with Maple Syrup

Country: Germany

Company: REWE Markt

Brand: Rewe Feine Welt (private label)

Sub-category: Table sauces

Store name: REWE

Store type: Supermarket

Date published: March 2011

This new product is described as a sauce that is fruity and tart, and made with Canadian cranberries and maple syrup.

Ice Cream with Caramelized Walnuts and Canadian Maple Syrup

Country: Russia

Company: Glacio

Brand: Viva la Crema

Sub-category: Dairy-based frozen products

Store name: Utkonos

Store type: Supermarket

Date published: August 2012

This new variety/range extension is described as an exclusive product that is made with fresh cream and Canadian maple syrup, and comes with a spoon inside.



Maple Popcorn

Country: United Kingdom

Company: Boots

Brand: Boots Shapers (private label)

Sub-category: Popcorn

Store name: Boots

Store type: Drug store/pharmacy

Date published: April 2012

This new product is described as being lightly coated in rapeseed oil, sugar and maple syrup flavouring, and free-from hydrogenated fats, artificial colours and flavours. The product claims to be suitable for vegetarians, and slimming. It has 92 calories and does not contain additives/preservatives.

Pear & Maple Syrup Mini Pizzas

Country: France

Company: La Pizza de Manosque

Brand: Les Sucrées de Manosque

Sub-category:

Cakes, pastries & sweet goods

Store name: Intermarché

Store type: Supermarket

Date published: January 2012

This new product is said to have been cooked on a wood fire and thus, should be served warm, with only five to seven minutes required to heat the product in the oven. The product claims to have environmentally friendly packaging and is also available in a Banana and Chocolate variety.



Source for all: Mintel, 2012.

▶ OTHER MAPLE-BASED PRODUCTS



Other maple-based product launches, ranging from more traditional items to interesting and unconventional products, highlight the diverse uses of maple syrup that producers are expanding on, such as in baking.

New Product Examples

Other maple-based products introduced to the European market from January 2011 to December 2012 are featured below.



Granulated Maple Sugar

Country: France

Company: La Ferme Martinette

Brand: La Ferme Martinette

Sub-category: Other natural sweeteners

Store name: BHV

Store type: Department store

Date published: September 2012

This new product is described as suitable for replacing white and brown sugar in a variety of ways, such as on crêpes, pancakes and fruit, or in cereal, desserts, and yogurt.

Organic Maple Syrup Flakes

Country: Finland

Company: NaturataSpielberger

Brand: Naturata

Sub-category: Other natural sweeteners

Store name: K-Citymarket

Store type: Mass merchandise/hypermarket

Date published: October 2011

This new product claims to be organic and is described as being suitable for sweetening and decorating. It is made from 100% dried maple syrup that is processed using a method that conserves the nutrients of the syrup.



Cream Fudge with Maple Syrup

Country: France

Company: Auchan

Brand: Auchan (private label)

Sub-category: Toffees, caramels & nougat

Store name: Auchan

Store type: Mass merchandise/hypermarket

Date published: May 2012

This new variety/range extension contains pieces that are individually wrapped. A Cream Fudge and Walnut version is also available.

Pure Maple Soft Sweets

Country: France

Company: Le Ferme Martinette

Brand: Le Ferme Martinette

Sub-category: Other sugar confectionery

Store name: BHV

Store type: Department store

Date published: August 2012

This new product is described as being of high quality and made from 100% pure maple syrup that is produced from the condensation of the sugar maple tree's sap in the springtime.



Source for all: Mintel, 2012.

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