



MARKET ACCESS SECRETARIAT Global Analysis Report

Commodity Innovation Series **NEW PRODUCTS CONTAINING PROPOLIS**

FEBRUARY 2017



EXECUTIVE SUMMARY

Globally there were 228 products containing propolis introduced between January 2010 to October 2016, with 193 launched in Food, 20 in pet food and 15 in drinks.

During the evaluation period, the use of propolis has been on a rise, with the most new product launches (43) occurring in 2016. Globally, Brazil saw the most new product launches containing propolis, with a total of 44. While Mexico was the second largest, followed by Japan and France.

Broncolin, Famille Michaud Apiculteurs, and Han Herred Bolcher are the top companies in the world to launch the most products containing propolis. Broncolin launched 13 products, followed by Famille Michaud Apiculteurs with 6 products, and Han Herred Bolcher with 5 all which were launched within the sugar and gum confectionery and sweet spread product categories.

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INTRODUCTION

According to Mintel Global New Product Database (GNPD), from January 2010 to October 2016, there were 228 product launches in the world. Of the total products launched 66.7% of them were new, while 33.3% were re-launches due to new packaging, new variety and range extension.

In figure 1, you can see there is a growing use of propolis in product launches around the world and 2016 is expected to see the highest growth within the review period.

Figure 1: New Products Containing Propolis, from January 2010 to October 2016



REGIONS

Within the review period forty countries in the world launched products containing propolis. The Europe region launched the most products with a total 83, followed by Latin America (76), and Asia Pacific (54). However, countries within the Latin America region launched the most products such as Brazil with a total of 44 products and Mexico with 24 (see figure 2).

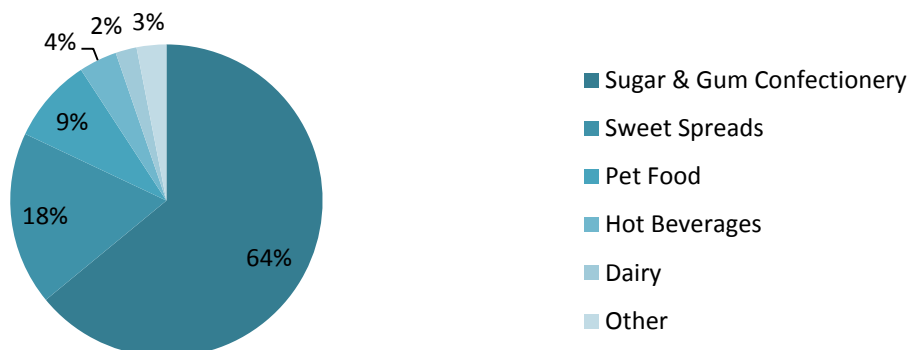
Figure 2: New Products Containing Propolis by Regions from January 2010 to October 2016

Region	Number of Products Launched	Top 3 Countries
Europe	83	France (19)
		Spain (18)
		Germany (12)
Latin America	76	Brazil (44)
		Mexico (24)
		Argentina (4)
Asia Pacific	54	Japan (19)
		South Korea (10)
		Taiwan (7)
North America	9	United States (8)
		Canada (1)
Middle East/Africa	6	Israel (2)
		Egypt (2)
		Saudi Arabia (1)



PRODUCT CATEGORIES

Figure 3: Top New Product Launch Categories



The product categories to have the most product launches containing propolis, were sugar and gum confectionery, sweet spreads, and pet food. All together accounted for 91% of new launches (*see figure 3*). Within the sugar and gum confectionery category, medicated confectionery accounted for 75% of product launches in the category, followed by boiled sweets with 16 launches. In the sweet spreads, honey was the largest sub-category with 40 launches. Lastly, in the pet food category, cat food wet and dog food dry were the main sub-categories to have product launches containing propolis (*see figure 4*).

Figure 4: New Product Launched Categories and Sub-Categories, from January 2010 to October 2016

Category	Sub-Category	Number of Products
Sugar & Gum Confectionery - 146	Medicated Confectionery	109
	Boiled Sweets	16
	Pastilles, Gums, Jellies & Chews	6
	Standard & Power Mints	6
	Gum	4
	Lollipops	4
	Other Sugar Confectionery	1
Sweet Spreads - 41	Honey	40
	Syrups	1
Pet Food - 20	Cat Food Wet	9
	Dog Food Dry	8
	Dog Snacks & Treats	3
Hot Beverages - 9	Tea	8
	Malt & Other Hot Beverages	1
Dairy - 5	Drinking Yogurt & Liquid Cultured Milk	4
	Flavoured Milk	1
Alcoholic Beverages - 2	Flavoured Alcoholic Beverages	1
	Vodka	1
Juice Drinks - 2	Fruit/Flavoured Still Drinks	2
Breakfast Cereals - 1	Hot Cereals	1
Carbonated Soft Drinks - 1	Carbonated Soft Drinks	1
Sports & Energy Drinks - 1	Energy Drinks	1
Total Sample		228

Source for both: Mintel, 2016



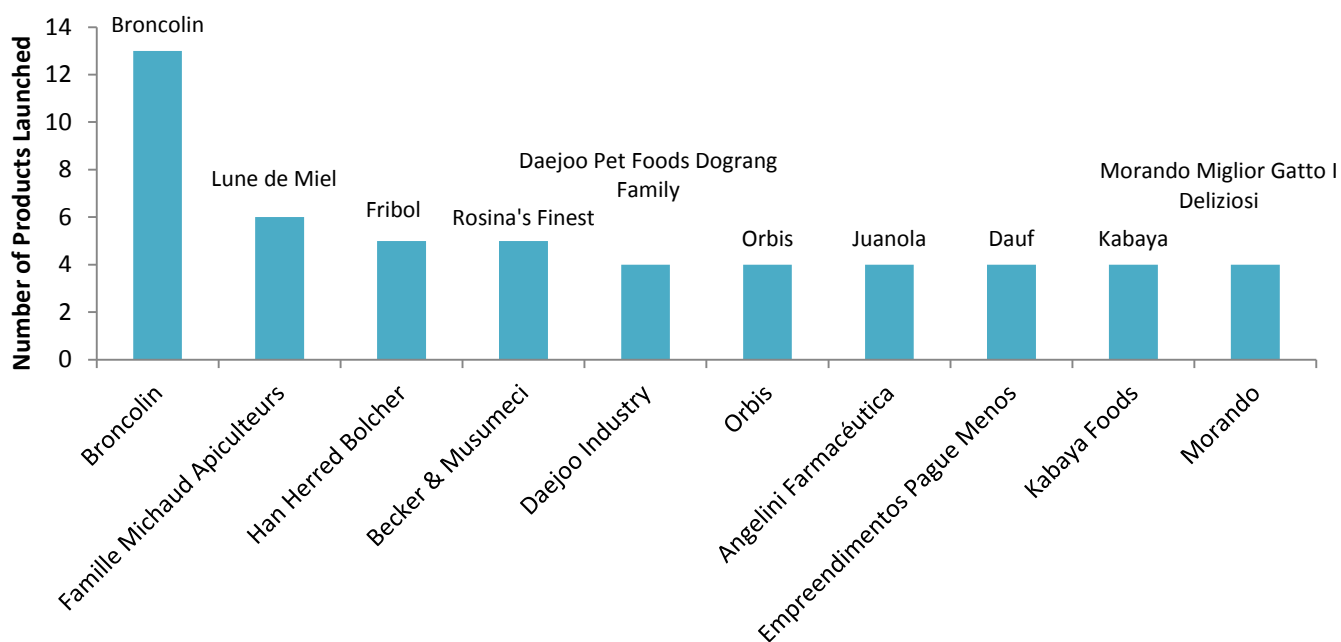
COMPANY AND BRAND

In the review period, 185 companies across the world launched products containing propolis. The company to launch the most products was Broncolin with a total of 13 launches mostly occurring within the last three years of the review period. Most of Broncolin's product launches occurred in Mexico and the US within the sugar and gum confectionery category.

The second largest company to launch propolis products was Famille Michaud Apiculteurs with a total of 6 products, all of which were launched in 2015 and 2016. Most of Famille Michaud Apiculteurs products are sweet spreads. The company launched its products in various countries around the world such as France, Singapore, Croatia, and Malaysia.

The third largest company was Han Herred Bolcher with a total of 5 products, most of which were launched in European countries such as Denmark, Finland, Germany, Norway, and Sweden. The company launched most of its products within the sugar and gum confectionery category.

Figure 5: Top 10 Companies and Their Top Brands, from January 2010 to October 2016



Source: Mintel, 2016.



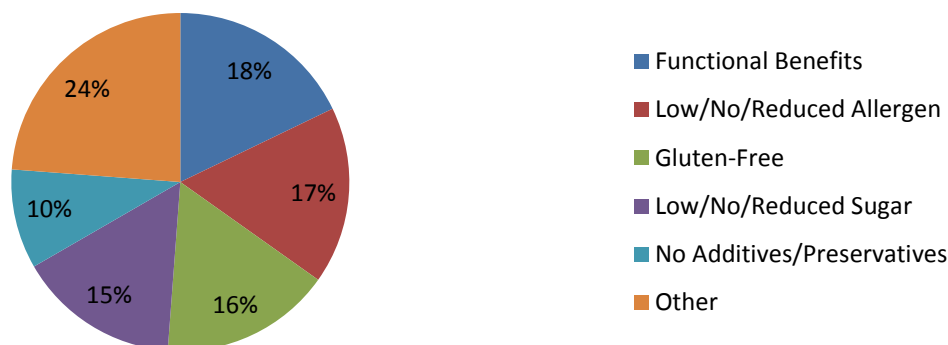
Figure 6: Top Countries and their Top 3 Companies to Launch New Products Containing Propolis, from January 2010 to October 2016

Country	Company	Sub-Category	Number of Products
Brazil	Empreendimentos Pague Menos	Medicated Confectionery Boiled Sweets	4
	Via Verde Produtos Naturais	Boiled Sweets Standard & Power Mints	3
	Floema Indústria de Produtos Naturais	Honey	2
Mexico	Broncolin	Medicated Confectionery Lollipops	12
	Prosana Distribuciones	Medicated Confectionery	2
	Comercializadora Apícola Internacional	Medicated Confectionery	1
France	Famille Mary	Tea/Gum/Honey	3
	Famille Michaud Apiculteurs	Honey	3
	Ballot-Flurin Apiculteurs	Medicated Confectionery	2
Japan	Kabaya Foods	Medicated Confectionery/Standard & Power Mints	4
	Orbis	Medicated Confectionery/Tea	4
	Kanro	Medicated Confectionery	3
Spain	Angelini Farmacéutica	Medicated Confectionery	4
	Torróns I Mel Alemany	Medicated Confectionery/Honey	2
	Angelini Farma-Lepori	Medicated Confectionery	1

PRODUCT CLAIMS

The top claims of product launches containing propolis were health and wellness related with functional benefits, low/no/reduced allergen and gluten-free being the leading claims across the world. In Asia Pacific, functional claims was most common, while in Europe, the Middle East and Africa, low reduced sugar was the leading claims.

Top Claims From Product Launches Containing Propolis, from January 2010 to October 2016



Source for both: Mintel, 2016.



PRODUCT EXAMPLES

Strawberry Flavored Hard Candy with Herbal Extracts

Record ID: 4372325
Company: Broncolin
Brand: Broncolin Sugar Free
Category: Sugar & Gum Confectionery
Sub-Category: Medicated Confectionery
Country: Mexico
Country of Manufacture: Mexico
Import Status: Not imported
Store Name: Walmart
Store Type: Mass Merchandise/Hypermarket
Store Address: Mexico City 04890
Date Published: Oct 2016
Product source: Shopper
Launch Type: New Product
Price in US Dollars: 1.92
Bar Code: 714706904042



Product Description

Broncolin Sugar Free Caramelo Macizo de Fresa con Extractos Herbales (Strawberry Flavored Hard Candy with Herbal Extracts) is said to have a refreshing and delicate strawberry taste. The sugar free product retails in a 35g pack containing 16 candies.

Propolis Candies

Record ID: 4341683
Company: Nadiprana
Brand: Propol-Mel
Category: Sugar & Gum Confectionery
Sub-Category: Medicated Confectionery
Country: Spain
Store Name: Veritas
Store Type: Supermarket
Store Address: Barcelona 08021
Date Published: Oct 2016
Product source: Shopper
Launch Type: New Product
Price in US Dollars: 4.31
Bar Code: 0689076910163



Product Description

Propol-Mel Caramelos de Própolis (Propolis Candies) are 100% natural and holistic, said to balance body, mind and spirit.. This product is free from gluten and sugar and can be used to fight bad breath and throat infection. It retails in a 75g pack.



Honey Squash

Record ID: 4274473
Company: Ito En
Brand: Ito En x Tully's Coffee
Category: Carbonated Soft Drinks
Sub-Category: Carbonated Soft Drinks
Country: Japan
Country of Manufacture: Japan
Import Status: Not imported
Store Name: Family Mart
Store Type: Convenience Store
Store Address: Katsushika-ku
Takasago, Tokyo 125-0054
Date Published: Sep 2016
Product source: Shopper
Launch Type: New Product
Price in US Dollars: 1.63
Bar Code: 4901085182376



Product Description

Ito En x Tully's Coffee Honey Squash is designed to replicate the taste of honey squash served at Tully's Coffee. It features aromatic honey from Argentina, royal jelly and propolis. The product is free from artificial sweeteners and retails in a 500ml recyclable bottle. Launched on August 8th 2016 with an RRP of 151 yen.

Organic Duck with Pumpkin for Adult Cats

Record ID: 4052861
Company: Becker & Musumeci
Distributor: Becker & Musumeci
Brand: Rosina's Finest
Category: Pet Food
Sub-Category: Cat Food Wet
Country: Germany
Date Published: Jun 2016
Product source: Trade Show
Launch Type: New Product
Price in US Dollars: 1.63
Bar Code: 4260479460033



Product Description

Rosina's Finest Bio-Ente mit Kürbis Adult (Organic Duck with Pumpkin for Adult Cats) contains coconut oil and propolis, 94.4% meat and 0.1% taurine. This CO2 neutral cat food is free from gluten, wheat, soya, sugar, nitrite curing salt, preservatives, animal and bone flour, and acceptance enhancers. It retails in an 85g pack featuring the BIO and Lacon logos. The product was on display at Interzoo 2016 in Nuremberg, Germany.



Honey with Propolis Extract

Record ID: 3241895
Company: Novo Mel Industria e Comercio Exterior
Brand: Novo Mel
Category: Sweet Spreads
Sub-Category: Honey
Country: Brazil
Country of Manufacture: Brazil
Import Status: Not imported
Store Name: Organomix
Store Type: Internet/Mail Order
Date Published: Jun 2015
Product source: Shopper
Launch Type: New Product
Price in US Dollars: 4.41
Bar Code: 7897646300082



Product Description

Novo Mel Mel com Extrato de Própolis (Honey with Propolis Extract) is now available. The gluten-free product has been inspected by the Ministry of Agriculture and retails in a 330g pack.

Exceptionally Smooth Bourbon Blend with Dry Flavours

Record ID: 1899671
Company: Pernod Ricard
Brand: Wild Turkey American Honey
Category: Alcoholic Beverages
Sub-Category: Flavoured Alcoholic Beverages
Country: New Zealand
Store Name: Liquorland
Store Type: Specialist Retailer
Store Address: Christchurch 8041
Date Published: Oct 2012
Product source: Shopper
Launch Type: New Product
Price in US Dollars: 15.33
Bar Code: 9343496000897



Product Description

Wild Turkey American Honey Exceptionally Smooth Bourbon Blend with Dry Flavours is now available. This product retails in a recyclable pack containing four 340ml bottles. Also available is Bourbon Mixed With Cola.



CONCLUSION

In conclusion, within the past few years propolis is increasingly being used as an ingredient in new health and wellness product launches, primarily in medicinal sugar and gum confectionery products. However, there is growing use in other product categories such as pet foods and in beverages.

Propolis usage is highly common in Latin American countries such as Brazil, Mexico, and Argentina. In addition to European and Asia Pacific countries such as France, Spain, Italy, Japan, and South Korea.

FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services**
www.tradecommissioner.gc.ca/
- **Find a Trade Commissioner**
www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

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- ats-sea.agr.gc.ca

RESOURCES

Mintel Global New Products Database, 2016.



Commodity Innovation Series

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Global Analysis Report

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