



## **BABY FOOD TRENDS IN BRAZIL AND NORWAY**

A custom report compiled by Euromonitor International Consulting  
For World Health Organisation  
June 2015

This report was produced by Euromonitor International for the World Health Organisation over which World Health Organisation retains all rights of ownership and exclusive use. The report includes data that is the exclusive property of Euromonitor International Ltd and its licensors. All such source material is © Euromonitor International Ltd 2015 and provided without any warranties or representations about accuracy or completeness. Any reliance on such material is made at users' own risk

## INTRODUCTION

EXECUTIVE SUMMARY

COUNTRY ANALYSIS: NORWAY

PRODUCT PROFILES: NORWAY

COUNTRY ANALYSIS: BRAZIL

PRODUCT PROFILES: BRAZIL

APPENDIX



## INTRODUCTION

## PROJECT SCOPE AND SOLUTION

## PROJECT BACKGROUND

World Health Organisation (WHO) are increasingly concerned about inappropriate marketing practices for complementary foods for children. To provide additional data and support recommendations, WHO has requested Euromonitor International assist in the compilation and analysis of data in Latin America and Europe on current market trends for complementary foods, and marketing practices.

**Challenge**

Develop a deeper understanding of the marketing of baby food in Norway and Brazil in order to assess level of inappropriate marketing practices for complementary foods for children/ babies

**Approach**

1. Store audits in Brazil and Norway
2. Selection of 20 products and further analysis of each of these

**Deliverable**

1. Presentation containing store audit results as well as accompanying analysis
- 2 Excel document containing store audit findings

## PROJECT OBJECTIVES

- Analysis of current marketing practices of selected complementary food products
- Assessment of the,
  - What messages/ claims are made by the brands?
  - How do the brands position themselves versus breast milk?
- What key market trends exist in each of the markets which may impact the positioning and brand behaviour?

## CHANNEL COVERAGE

- Supermarkets
- Hypermarkets
- Local grocery/ convenience
- Pharmacy
- Online

## PRODUCT COVERAGE

- Prepared baby food
- Dried baby food
- Other baby food

INTRODUCTION

**EXECUTIVE SUMMARY**

COUNTRY ANALYSIS: NORWAY

PRODUCT PROFILES: NORWAY

COUNTRY ANALYSIS: BRAZIL

PRODUCT PROFILES: BRAZIL

APPENDIX





## EXECUTIVE SUMMARY

## KEY TRENDS AND LEGISLATION

*A market led by strict regulations and mindful inquisitive consumers*

## Key Trends



## Attention to label detail

- Encouraged by Norwegian health authorities



## Internet is pivotal in product assessment

- Product testing and reviews are posted on blogs by panels and individuals



## Need for convenience

- Increasingly busy lifestyles warrant speedy alternatives to freshly prepared options



## Ecologic Products

- Growing concerns and awareness of added chemicals pushes interest in organic food



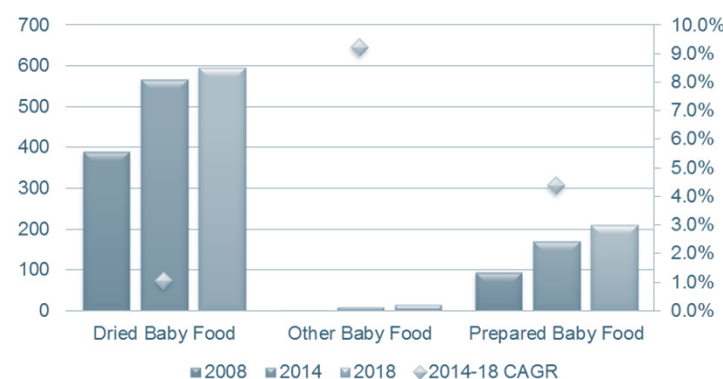
## Breastfeeding on the rise

- Norwegian Health Authorities have been pivotal in promoting the benefits of this

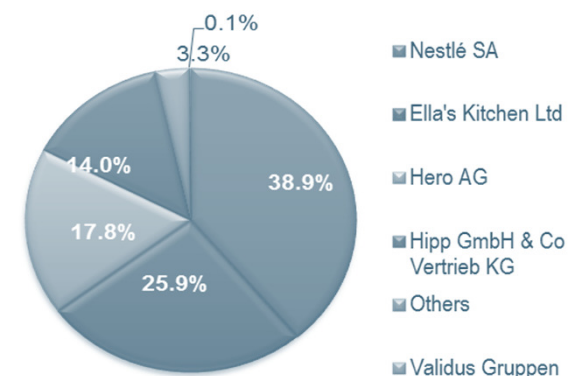
## Legislation

- Regulations follow EU standards but in Norway are more strict in terms of content and misleading information due to the stance of the Norwegian Food Safety Authority
- Prohibited to market and promote baby and children products directly to children and babies

## Category size 2014 and 2014-2018 CAGR



## Key players 2014







EXECUTIVE SUMMARY

# MARKETING PLATFORMS

*Social media is a growing platform for exchange of product comments and reviews*

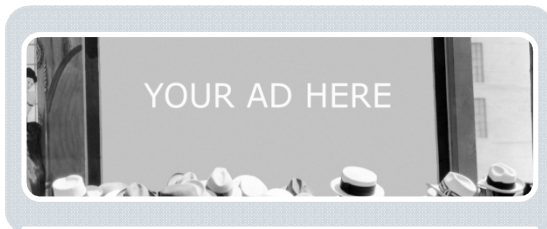


Social Media platforms such as Facebook, Twitter, Instagram are increasingly popular

HiPP



Present on Facebook with ~8,000 likes and on Instagram. Forum where users share comments and product reviews



TV and radio are not widely used mediums for marketing

Semper



Childrens magazines such as Foreldre & Barn magazine that are targeting mothers are also utilised for product promotion



## EXECUTIVE SUMMARY

# BRAND POSITIONING AROUND HEALTH CLAIMS

*Strict regulation leaves little space for brands to make unfounded health and structural claims*

## Health and structural claims

- It is not common to find brands who claim specific health or structural benefits of their product
- Overall development, aiding digestion and helping infant's get a good nights sleep are some of the claims that have been cited
- Specifically milk supplements among several brands include warnings about the correct and adequate use of milk supplements
- Thus companies such as Nestle, Hipp, Nutramigen, Semper or Nutricia state on their package the importance of consulting a doctor or Health Centres before using their product
- However not all complementary products catering to 0-2 year olds provide the recommendation

### Nestle Infant Formula NAN



Aimed at 0+ months  
Claims to aid digestion  
Labelling: breast milk is best for children and that is better to consult health centres and doctors before using this product

### Hipp: Carrots and Potatoes



Aimed at 4+ months  
Positioned as can be given to babies as a supplement when breastfeeding or for a gradual introduction of food



## EXECUTIVE SUMMARY

## SUMMARY AND CONCLUSIONS

*Increased control over marketing of complementary food to infants less than 6 months and consistency in labelling to recommend that breast milk should be the preferred option are two recommendations*



**WHO/ UNICEF guideline recommends:** Exclusive breastfeeding during the first six months of life, with continued breastfeeding to two years or beyond, along with complementary feeding from the age of six months

## Conclusions

- Products DO exist which market complementary food to infants less than 6 months
- Brands overall DO NOT make inappropriate health and structural claims
- Brands MOSTLY state that breast milk is best for children and that is better to consult health centres and doctors before using the product
  - HOWEVER, warning label and recommendation that breast milk is best for children is not used across all complementary food types aimed at 0-2 year olds

## Recommendations

- Regulation can be tightened to properly control marketing of complementary food to those aged less than 6 months
- Regulation can make it compulsory for all brands which cater to 0-2 years to contain recommendation that breast milk is best for baby
- Monitoring and enforcement to stretch to social media which is increasingly pivotal for consumers in making such decisions
- No real need to manage health and structural claims made by brands





## EXECUTIVE SUMMARY

## KEY TRENDS AND LEGISLATION

*Strict guidelines are monitored by national government body ANVISA*

## Key Trends



## Labelling importance increases

- Increased awareness amongst mothers means they are paying more attention to labelling content



## Social media rules

- Commercial through traditional formats are restricted so social media is a key focus for consumers and brands



## Busy customer lifestyles

- Mothers are increasingly involved in careers with limited time to freshly prepare meals



## Brand innovation

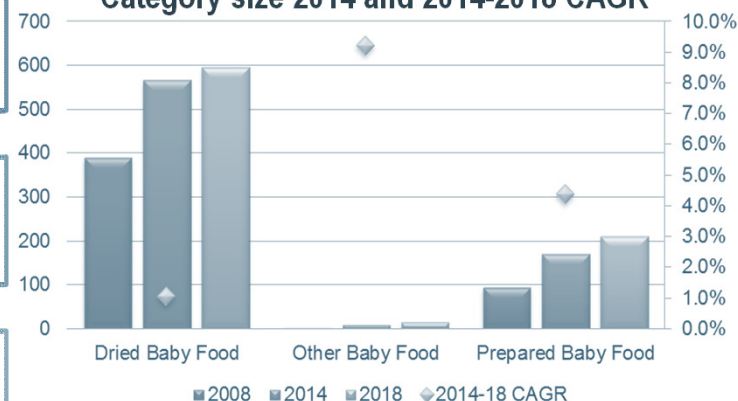
- Wider portfolios and innovative packaging is becoming common



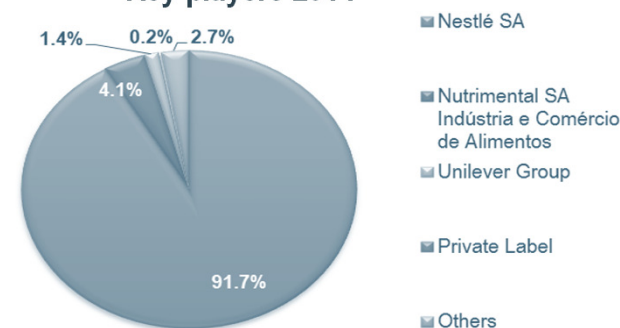
## Females are key decision makers

- Not just because they are mothers but also because they are achieving financial independence

## Category size 2014 and 2014-2018 CAGR



## Key players 2014



## Legislation

- Legislation is created by the Ministry of Health and monitored by ANVISA, a national government body.
- There are restrictions which provide a maximum vitamin and mineral content limitation
- Furthermore commercial promotion of products on TV and Radio are prohibited; Only promotions through specialised media (market related magazines) and directly to health professionals are allowed
- For prebiotic & probiotic products it will be obligatory to have a warning that it cannot be consumed by premature babies, babies with deficiencies in their immune system or heart disease.



## EXECUTIVE SUMMARY

## MARKETING PLATFORMS

*Social media is a vital platform for consumers and manufacturers both, mainly given the restrictions around advertising through TV and radio*

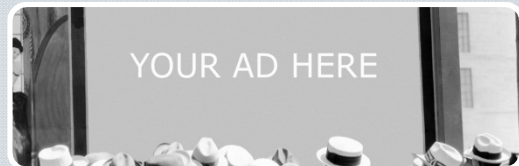


Social Media is to some degree a loophole to the restrictions for commercial promotion to reach purchase decision makers

Danone: Danoninho



Social Media is playing an important role in the product marketing strategy. The brand is present on Facebook and its page has over 277 thousand 'likes' and is also on Twitter.



TV and radio are not widely used mediums for marketing

CA – Puree baby food Nestle



Has a YouTube channel, an Instagram account with over 2 thousand followers and a Facebook page with almost 800 thousand likes and a blog – Vida de Mãe (mother's life). Widely mentioned in articles for pais e filhos and crescer magazines.



## EXECUTIVE SUMMARY

# BRAND POSITIONING AROUND HEALTH CLAIMS

*Although structural and health claims are made, information around and stance on breast feeding is clear*

## Health and structural claims

- Aiding digestion, helping baby to grow and learn and strengthening the immune system are some of the main health and structural claims that are made by brands
- Most products will contain recommendation to seek professional advice before feeding product to infants under the age of 1
- Further, most brands will clearly state the benefits of breast feeding
- Due to high obesity rates, added sugar / no added sugar and reduced salt are commonly used expressions on product labelling

### Nestle Pureed baby food



Aimed at 6+ months

Quotes MOH: 'not to be used for children below 6 (six) months of age, unless expressed by medical or nutritionist orientation. Maternal breast feeding avoids infections and allergies and is recommended until 2 (two) years of age or more

### Aptamil 1 Danone



Aimed at 0-6 months

Label details the importance of exclusive breastfeeding for the first six months to 2 years of age. It is remarked as substitute only in case of incapability for breastfeeding



## EXECUTIVE SUMMARY

## SUMMARY AND CONCLUSIONS

*Clear and consistent messages around benefits of breast feeding*



**WHO/ UNICEF guideline recommends:** Exclusive breastfeeding during the first six months of life, with continued breastfeeding to two years or beyond, along with complementary feeding from the age of six months

## Conclusions

- Products DO exist which market complementary food to infants less than 6 months
  - HOWEVER purchaser is directed to professional advise before giving to infant under 1 year
- Brands OVERALL do tend to make health and structural claims
- Brands MOSTLY state that breast milk is best for children and that is better to consult health centres and doctors before using the product
- Many unspecified age targeted products

## Recommendations

- Monitor health and structural claims to ensure these are supported with robust evidence
- Ensure that it is compulsory for all brands which cater to 0-2 years to contain recommendation that breast milk is best for baby
- Monitoring and enforcement to stretch to social media which is increasingly pivotal for consumers in making such decisions
- Ensure that marketing messages/ logos for products which target unspecified age groups make distinctly clear that these are not for consumption for 0-2 year old

INTRODUCTION

EXECUTIVE SUMMARY

**COUNTRY ANALYSIS: NORWAY**

STORE AUDITS: NORWAY

PRODUCT PROFILES: NORWAY

COUNTRY ANALYSIS: BRAZIL

STORE AUDITS: BRAZIL

PRODUCT PROFILES: BRAZIL

APPENDIX





## COUNTRY ANALYSIS: NORWAY

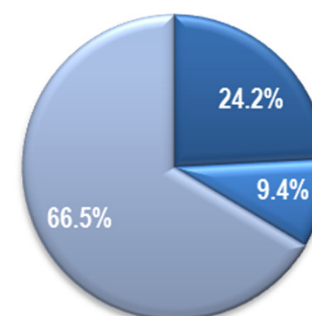
## MARKET OVERVIEW

*Healthy growth is experienced across baby food between 2014-2018 particularly in other and prepared baby food categories*

## Key Takeaways

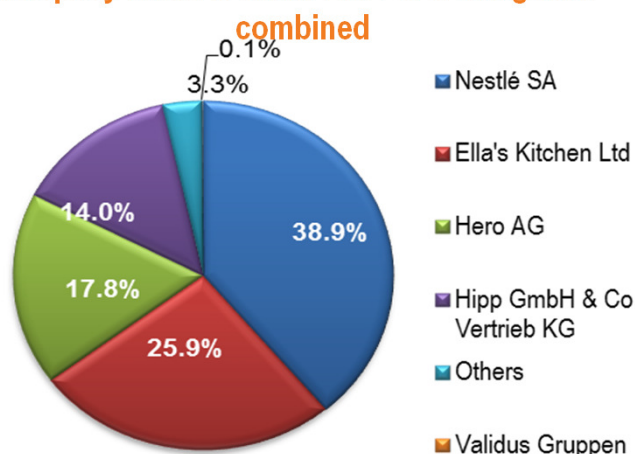
- The Norwegian market is consolidated with the leading player Nestlé accounting for 38.9% market share.
- Prepared baby food is the largest category making up 65.5% of the total market. Almost all baby food players offer a great variety of prepared products to meet the growing demand.
- Strong growth is seen in prepared baby food, bolstered by the increasing demand of mothers that have increasingly busy lifestyles and a lack of the time to prepare meals.
- The strongest growth between 2008-2014 was experienced in the other baby food category (products such as biscuits and fruit juices)

Category % value split 2014

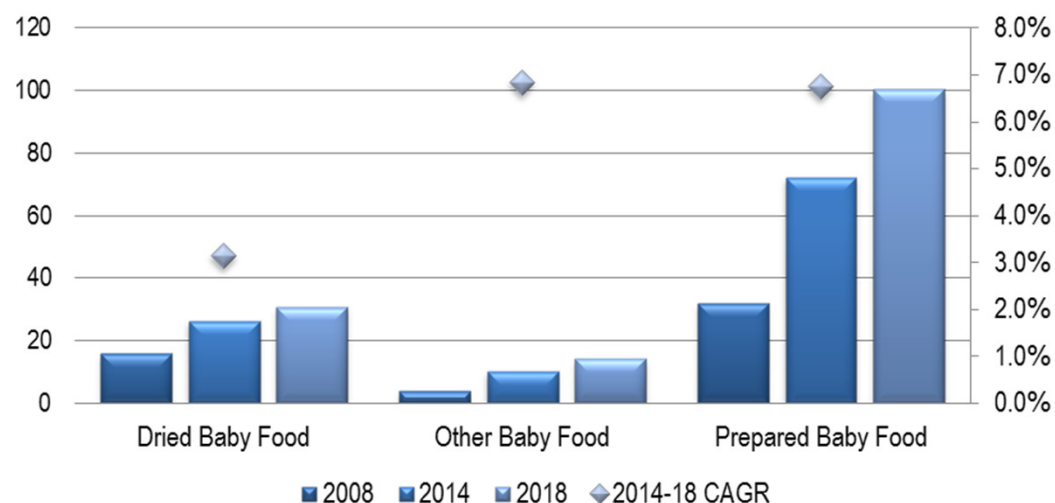


■ Dried Baby Food ■ Other Baby Food ■ Prepared Baby Food

Company value % share 2014 of 3 categories combined



Category \$MN size 2008, 2014, 2018 and 2014-2018 CAGR





COUNTRY ANALYSIS: NORWAY

## BABY FOOD CONSUMPTION – KEY TRENDS

*Attention to label detail is a key element to consumer purchasing decisions*

### Focus on labels

- Consumers pay special attention to detail on product labels. Consumers in general are well educated and will regularly research product information
- Norwegian Health Authorities and Health centres encourage and promote the idea of reading labels before buying a product

### Internet used extensively for information exchange

- Websites such as Klikk have a testing panel of mothers and chefs that review baby and children food products and rank products depending on the content, taste and price. Consumers in Norway tend to visit these types of website before buying products

### The convenience trend

- Norwegian consumers tend to buy more prepared baby as opposed to make it fresh at home
- There is a great variety available to them and essentially they save time

### Ecological products gain importance

- Ecological or organic baby and children food is gaining popularity due to strong concern among parents towards added chemicals.
- The number of brands such as Ellas Kitchen, Hipp or Holle are now offering a greater variety of organic products due to the increasing demand

### \*Breastfeeding is on the rise

- Although baby food categories are experiencing growth, more mothers in Norway are breastfeeding their babies and the trend has been on the rise over the last 10 years
- Norwegian Health Authorities have been pivotal in promoting the benefits of this

## COUNTRY ANALYSIS: NORWAY

## LEGISLATION, BRAND POSITIONING AND SOCIAL MEDIA

*Marketing and commercialisation of baby and infant food products is strictly regulated*

## Legislation

- The Ministry of Health has several regulations around the commercialization of infant food and milk substitute
- Regulations follow EU standards but in Norway are more strict in terms of content and misleading information due to the stance of the Norwegian Food Safety Authority
- It is currently prohibited to commercialize, promote or give away baby food products in hospitals where women give birth.
- The Norwegian Health Authorities give guidelines to new mothers on how to feed babies and it is always recommended that breastfeeding is best for babies.
- It is also prohibited to market and promote baby and children products directly to children and babies

## Social Media

- Social Media such as Facebook, Twitter, Instagram is increasing in popularity among consumers.
- There are some infant food and milk producers that are currently present on these platforms such as Hipp ecological infant food, Ellas Kitchen.
- Nestle, the leading player in infant food is not majorly present on social media, however they have their Nestle Club to promote customer loyalty ([www.nestlebarnemat.no](http://www.nestlebarnemat.no)) which is a way for parents to earn points, coupons with discounted prices and receive advice on questions about babies.

## Brand positioning

- Brands in Norway tend to follow regulations set by the Norwegian Health Authorities in terms of labelling
- Brands such as Nestle play on the 'Made in Norway' positioning to appeal to consumers, emphasising that Norwegian mothers are involved in creating the traditional recipes
- Brands in Norway tend to be less aggressive when approaching final consumers because Norwegian consumers do not like to be pushed to buy products.
- Manufacturers of powder milk supplements targeting 0-6 month consumers such as Nestle with its NAN brand or Hipp advice customers to consult their regular doctor or health centres prior to using a product

INTRODUCTION

EXECUTIVE SUMMARY

COUNTRY ANALYSIS: NORWAY

**STORE AUDITS: NORWAY**

PRODUCT PROFILES: NORWAY

COUNTRY ANALYSIS: BRAZIL

STORE AUDITS: BRAZIL

PRODUCT PROFILES: BRAZIL

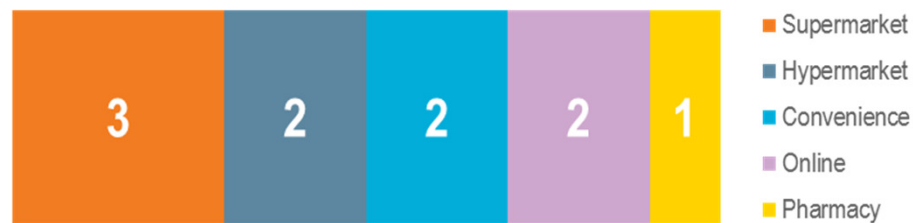
APPENDIX



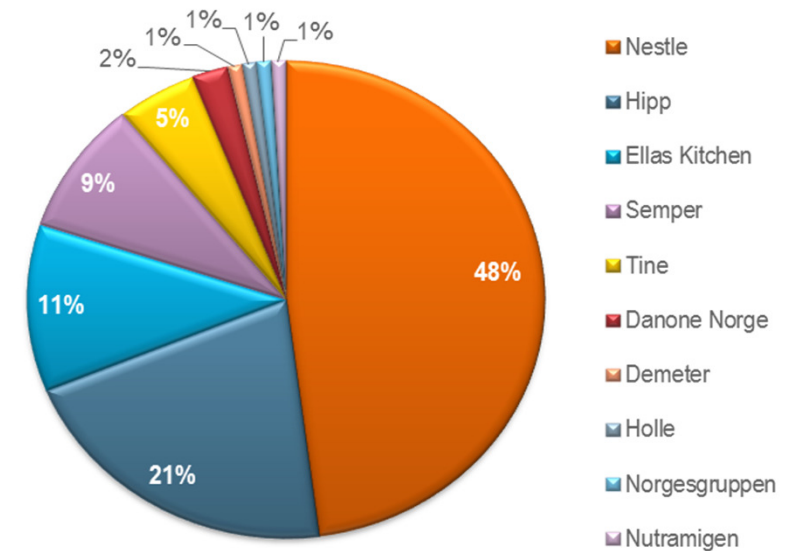
## STORE AUDITS

# A TOTAL OF 222 PRODUCTS WERE IDENTIFIED ACROSS 10 STORE AUDITS

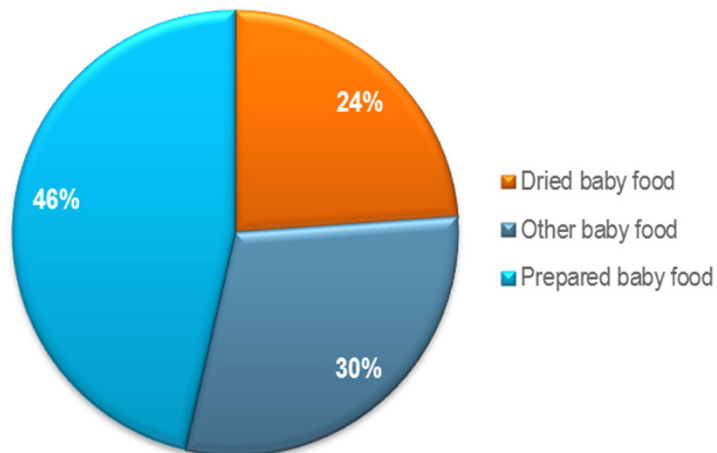
## 10 Audits conducted



## Total products (222) coverage by company



## Total products (222) coverage by category



## Key takeaways

- The leading player Nestle has strong in-store positioning in terms of shelf space and visibility
- Manufacturers regularly promote campaigns in supermarkets for baby and children food products, particularly when it comes to the launch of new products.
- New entrant players offer a great variety of products and this has intensified competition levels
- Overall, there is a wide range of ecological food products available through brands such as Hipp or Ellas Kitchen.

## COUNTRY ANALYSIS: NORWAY

## MAIN MESSAGE ABOUT HEALTH CLAIMS

*Health and structural claims are not commonly promoted by brands*

### Allergy

- Growing concerns amongst consumers relating to gluten, means brands feature the gluten free labelling very clearly where applicable (examples Semper and Holle)
- Other popular labels relate to 'traces of milk or egg' and 'no artificial flavouring' and 'no colourants'
- It is expected that manufacturers of baby products will increasingly launch more allergy free products

### Vitamins

- In general all manufacturers of baby food products including milk substitutes strongly promote vitamin and mineral content of their products for infants.
- The Norwegian Health Authorities advise parents to focus on providing babies with vitamin D and C (due to the lack of sun in the winter months). Many brands therefore are found to highlight this on their packaging (examples Nestle Fruit salad or Ellas Kitchen fruit smoothie)
- It is also promoted in Health Centres that children between six to five years should consume 8 milligrams of iron daily. Some companies are now adding extra iron with visible labels such as Hipp, Ellas Kitchen, Nestle, Småfolk or Holle.

### Health claims

- Milk supplements among several brands include warnings about the correct and adequate use of milk supplements
- This is the result of the strong marketing campaigns of Health Authorities encouraging mothers to breastfeed in the first months
- Thus companies such as Nestle, Hipp, Nutramigen, Semper or Nutricia state on their package the importance of consulting a doctor or Health Centres before using their product
- Other regular warnings found on packages are that the product should be used in line with the age of the child/baby
- Some health claims made by brands are that the contents of fiber, help the baby to sleep well

### POS Marketing and label design

- Brands regularly state that the product includes good oils, iron and vitamins, beneficial to child development
- Nestle with the great variety of products, occupies prime in-store positioning in terms of shelf space and product visibility.
- Hipp and Ellas Kitchen promote their brand through their pouch package innovation which is said to stimulate the babies development as they effectively feed themselves
- Organic brands such as Hipp, have big labels on the front stating 100% organic product - pushing the benefits of organic consumption



INTRODUCTION

EXECUTIVE SUMMARY

COUNTRY ANALYSIS: NORWAY

**PRODUCT PROFILES: NORWAY**

COUNTRY ANALYSIS: BRAZIL

PRODUCT PROFILES: BRAZIL

APPENDIX





## COUNTRY ANALYSIS: NORWAY

## WHOLE GRAIN PORRIDGE/ GOD NATT VEILLING: NESTLE

*Product claims that it is able to aid in providing the child with a good night sleep*

### Health & structural claims

This product claims that it contains the correct amount of fiber for a good sleep

There is no scientific evidence mentioned

The product claims that children sleep well with a full stomach because it contains 42% whole grain ingredients.

It is also stated to contain iron, calcium and vitamins

No other specific structural claim on this package

### Marketing

The product is marketed via the Nestle website [www.nestlebarnemat.no](http://www.nestlebarnemat.no)

Packaging of the product also mentions the 'Min Nestle Club' where points can be earned and exchanged for toys and other gifts

Children's magazines such as Foreldre & Barn magazine or BAM that are targeting mothers are also utilised for product promotion

This product is not marketed through TV or radio

### Consumer Segments

The main customer segment is educated mothers who are conscious of sugar levels and provision of adequate vitamins such as iron and calcium

Due to the product price and package design, this product targets mothers with medium to high income level

Consumer target – From 18 months onwards. Target children without allergies because it contains gluten and milk.

- The product does not openly undermine the benefits of natural breastfeeding; it positions itself more as a supplement to help with sleeping - the product has large labels on the package stating 'without added sugar' and that the product 'includes calcium and iron' and that it aids a good night sleep. The marketing/ reward element provides incentive to customers to maintain loyalty in exchange for gifts and toys

## COUNTRY ANALYSIS: NORWAY

## NAN INFANT FORMULA: NESTLE

*A milk supplement that helps support the digestive system*

### Health & structural claims

The product positions itself as a supplement mixture for infants

It claims to help the child's digestive system as it contains probiotic bacteria; beneficial for small babies from birth onwards

The product does not state specific scientific evidence to support this

Labelling warnings is that is not appropriate for children with milk allergies

### Marketing

This product is not marketed through TV, radio or social media.

This product is promoted on the Nestle website

[www.nestlebarnemat.no](http://www.nestlebarnemat.no)

Their website states WHO advice; that breast milk is recommended to be the only necessary nourishment for the first 6 months – Nestle appear to fully align and support this statement.

### Consumer Segments

The main customer segment is mothers who are perhaps unable to breast feed or those who require an additional supplement.

This product targets lower to medium income level mothers through its affordable price.

Consumer target – From 0+ months onwards.

- This product offers information on the package stating that breast milk is best for children and that is better to consult health centres and doctors before using this product. This is in line with the advice of health authorities in Norway who promote breastfeeding until the age of two years old. While Nestle align to WHO recommendation that breast milk is best for the baby, on their website, Nestle also states that if for any reason you cannot breastfeed or choose not to do it, then there is formula.

## COUNTRY ANALYSIS: NORWAY

**WHOLE GRAIN PORRIDGE/ FULLKORNSGRØT: HIPPI**

*A healthy and ecological supplement mixture with vitamins and minerals.*

**Health & structural claims**

There are no strong health statements for this particular product other than that it contains vitamins and is 100% ecological

This product has the krav, Lumu and organic symbols on the package

**Marketing**

This product is being marketed through baby magazines such as Foreldre & Barn magazine or BAM stating that the product is 100% ecological

The social media platform is strong with Hipp products – particularly Facebook.

Hipp is also present in Instagram Hipp Norge

**Consumer Segments**

The customer target segment is medium to high income parents who are looking for a high quality and ecological product

Consumer target – 8 months babies and over. This product is for babies without allergies as it contains milk and gluten.

- The packaging does not state that this type of product is able to replace breast feeding – it simply positions the product as being adequate for children of 8 months and over
- The Hipp brand name is quite visible on the front of the package – there are no scientific claims or health claims made by the brand.

## COUNTRY ANALYSIS: NORWAY

**CRISPBREAD/ KNEKKEBRØD JIPP: NORGESGRUPPEN**

*Crispbread is part of a regular traditional Norwegian meal for adults and children both*

**Health & structural claims**

This product does not claim any specific benefit to the child but does have a green keyhole on the package that is given to products that have less sugar, salt, without saturated fat.

The green keyhole is a symbol to help consumers easily select healthy products without reading extensively the nutritional value label.

No specific structural claims on the package

**Marketing**

The Jipp brand is a private own label of Norgesgruppen and is mostly promoted through their own supermarkets such as Meny.

There are other platforms used for this product to market such as TV, radio and social media.

**Consumer Segments**

The target segments present in this product are consumers that want to buy crispbread without focusing on the brand

Purchaser target: Low to medium income consumers or mothers that focus on low prices.

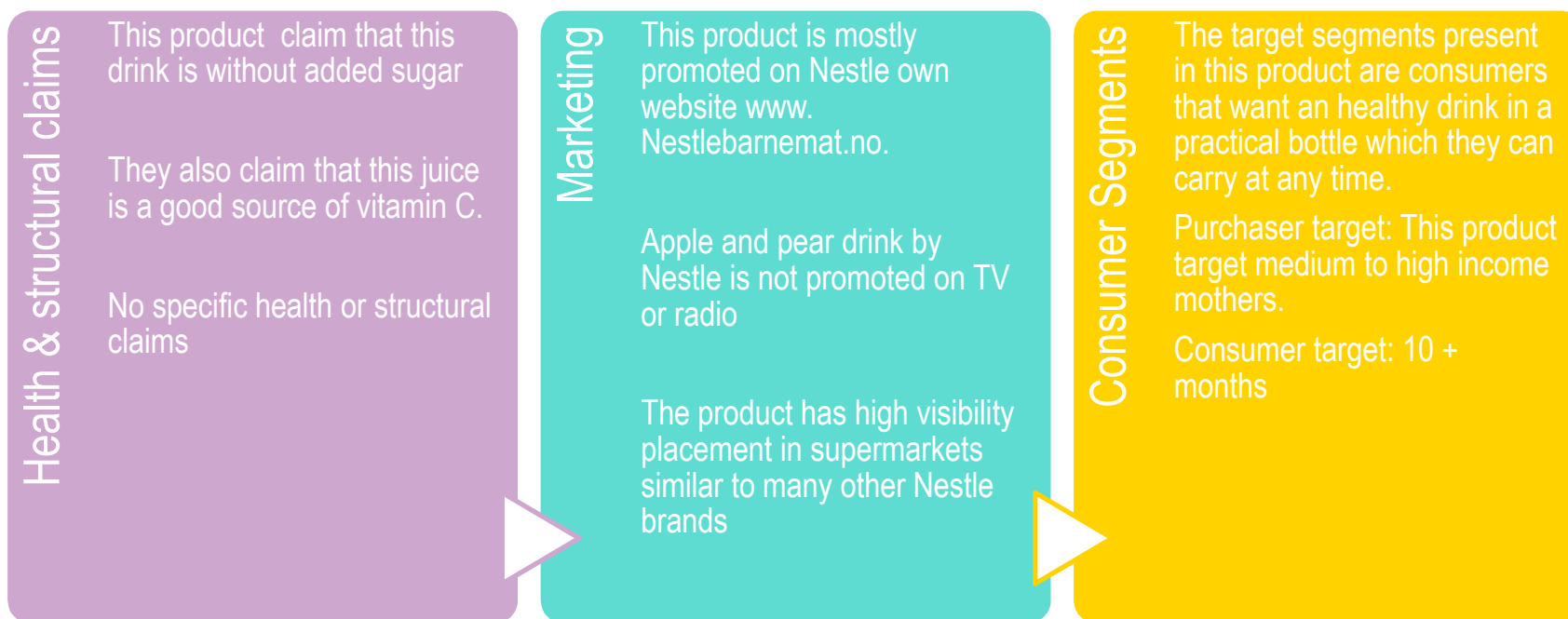
Consumer target: 18 months old and over..

- This product does not undermine natural breastfeeding and it caters to the 18 month + child
- Jipp Crispbread focus on establishing itself as a convenient product to be used as a snack or breakfast, lunch or dinner.
- No health or structural claims are present in this product other than it contains the keyhole symbol of a healthy option.

## COUNTRY ANALYSIS: NORWAY

## APPLE AND PEAR/ EPPLE OG PÆRE DRIKK: NESTLE

*Providing a source of vitamin C, this product is catering to babies and children older than 10 months*



- This product does not appear to undermine natural breastfeeding
- The product is positioned as a healthy beverage choice providing a source of vitamin C

## COUNTRY ANALYSIS: NORWAY

**PASTA WITH MEAT /SPAGHETTI BOLOGNESE: SEMPER**

*Catering to 8 months +, this product claims to aid overall development of the child*

**Health & structural claims**

The product claims that the portions of ingredients used (pasta and meat) for each serving is useful for development of the child development.

The product also emphasises its high quality level

**Marketing**

This product is promoted on their own website in a specific section for babies 8 + months

[www.semperbarnemat.no](http://www.semperbarnemat.no)

There are no promotional campaigns on TV or radio

Some magazines promote occasionally this product such as BAM magazine.

Semper is present in Facebook and promote this and other products. They also have a chat where consumers can ask question about their products.

**Consumer Segments**

Purchaser target: his product focus on medium to high income consumers.

Consumer target: 8 + months old. Children that do not have allergies as it contains egg and gluten.

- This product is positioned as a complementary element of the child's diet
- The product claims that it has a 'natural' taste and that is appropriate to children development



## COUNTRY ANALYSIS: NORWAY

**BANANAS STRAWBERRIES SMOOTHIE: ELLAS KITCHEN**

*An organic smoothie certified by USDA with a practical and convenient package*

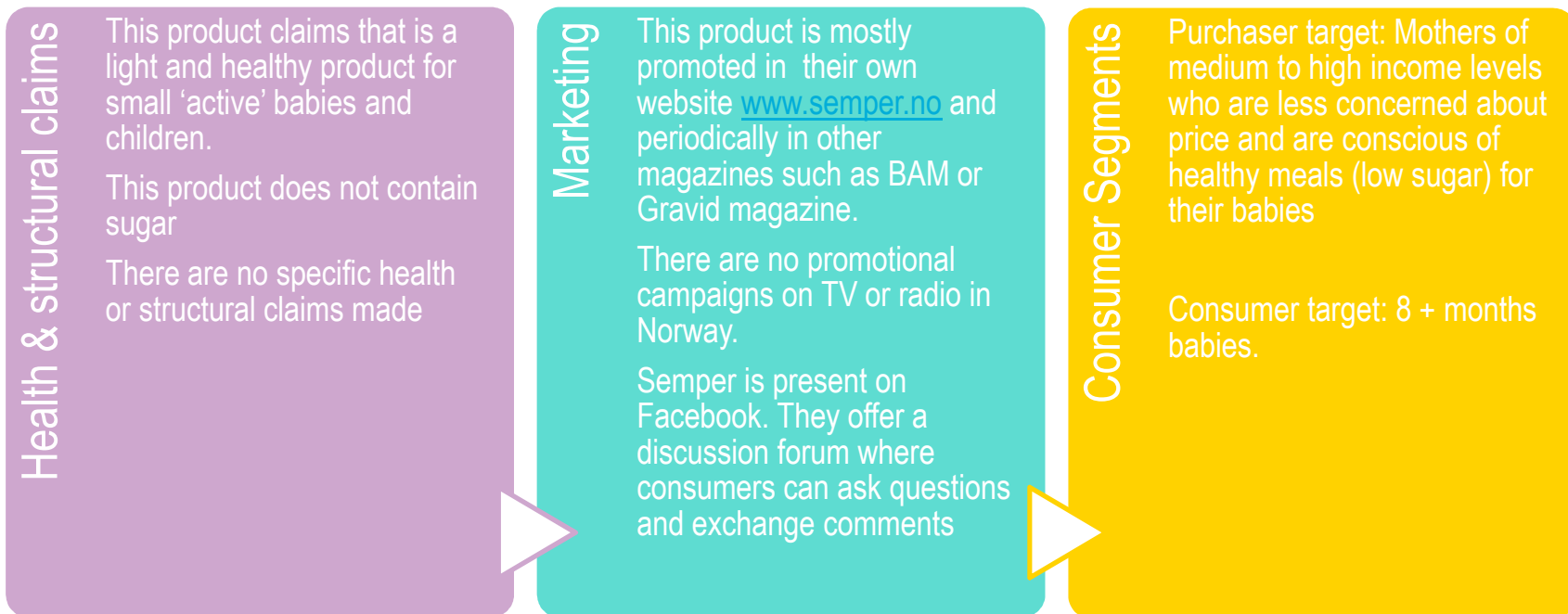


- This product does not make any reference to breastfeeding. It is positioned as a complementary and convenient element of the child's diet
- The package comes in a red pouch with an easy system to open, close and store.
- Ellas Kitchen targets affluent mothers that focus on organic products and on Ellas kitchen brand. This product is more expensive than other brands such as Nestle or Semper

## COUNTRY ANALYSIS: NORWAY

**PEACH YOGURT /PERSIKA MELLANMÅL: SEMPER**

*A light and healthy product for 'active' babies, which does not contain added sugar*

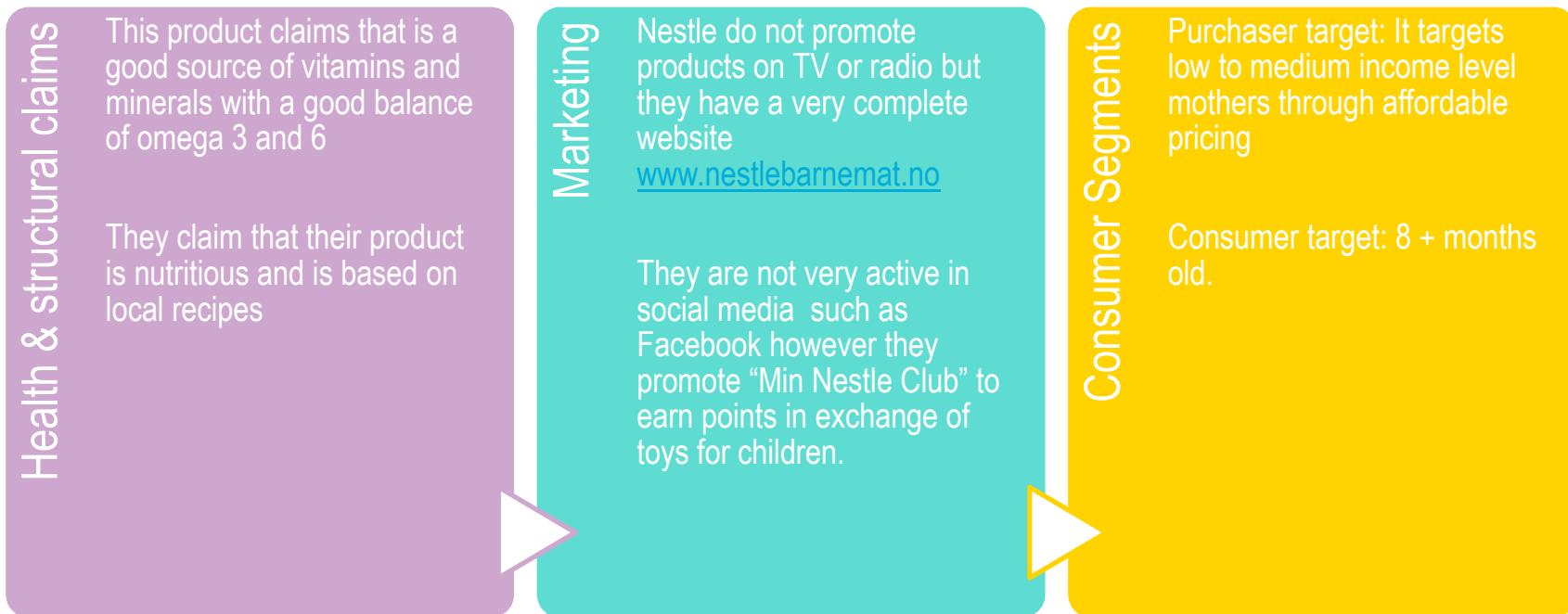


- This product does not make any reference to breastfeeding but this is mainly because this is not a milk product and is positioned more as a complement meal

## COUNTRY ANALYSIS: NORWAY

**CHICKEN WOK/ KYLLINGWOK: NESTLE**

*No real structural claims are made here, the product is overall positioned as a complete meal for 8 month + infants*



- This product does not appear to undermine natural breastfeeding
- This product is positioned as a complete meal for babies aged 8+ months. It targets mothers that are familiar with the Nestle brand and want to buy an affordable and convenient product.

## COUNTRY ANALYSIS: NORWAY

**FISH AND POTATO/ FISKEBOLLER NORSK FAVORITT: NESTLE**

*Healthy fat levels are promoted as being vital to development of babies; aims to cater to 8 months + babies*

**Health & structural claims**

The product states that children need a good level of fat content in their diet

The product claims to provide low levels of saturated fat and a good balance of omega 3 (alpha linolenic acid) and omega 6

They claim that their product is nutritious and is based on local recipes

**Marketing**

Nestle do not market their products on TV or radio but they promote their products on their website [www.nestlebarnemat.no](http://www.nestlebarnemat.no)

Nestle is promoting their Nestle Club where consumers can win points when buying several Nestle products and exchange for toys.

**Consumer Segments**

The target segment are consumers that are challenged by busy lifestyles in preparing fresh meals and so look to affordable and nutritious meals for their babies/ infants

Consumer target: 8 + months babies that do not have allergies to fish.

- This product is positioned to complement a regular diet of babies and does not make any statements relating to substitution of breast feeding.
- They promote the consumption of fish as a good source of oils which include omega 3 and 6 and a good source of protein.

## COUNTRY ANALYSIS: NORWAY

**FRUIT SALAD/ FRUKT SALAD/: HIPPI**

*Positioned as a nutritious snack containing 100% organic fruit*

**Health & structural claims**

It contains 100% ecological fruits without additives and contains vitamin C  
This product does not make structural claims

**Marketing**

The product is not market in TV or radio  
Fruit salad by Hipp is occasionally present in babies and children magazines that target mothers  
The company has a website [www.hipp.no](http://www.hipp.no) and offer basic information of the product. They are present in social media such as Facebook where they provide product info quiz contests  
They are also present on Instagram Hipp Norge

**Consumer Segments**

The target segments present in this product are consumers that have high level of education and focus on organic products  
Purchaser target – high – medium income level mothers that are focused on quality over price  
Consumer target – It is stated to be appropriate for 6 + month babies and for older children and adults. The product does not contain added sugar or gluten.

- The product does not appear to undermine breastfeeding; it states that it is a complimentary meal of a regular food diet for babies and that is appropriate for babies, children and adults.
- The package focuses on stating that it contains 100% organic fruits and vitamin C.

## COUNTRY ANALYSIS: NORWAY

**LASAGNA IN A GLASS/FULLKORN LASAGNE: NESTLE**

*Catering to 12 months + demographic, the product does not make any real health or structural claims*

**Health & structural claims**

This product claims that it has great taste and that it is a nutritious and local recipe

It contains vitamins and minerals such as Omega 3, however there are no clear health/ structural claims made

**Marketing**

Nestle do not market their products on TV or radio but they promote their products on their website

[www.nestlebarnemat.no](http://www.nestlebarnemat.no).

Nestle products are sometimes promoted in children magazines that target mothers.

Nestle is promoting their Nestle Club where consumers can win points when buying several Nestle products and exchange for toys.

**Consumer Segments**

Purchaser target: Low to medium income mothers considering the relatively low price points

Consumer target: 12 + month babies. It contains traces of egg and gluten.

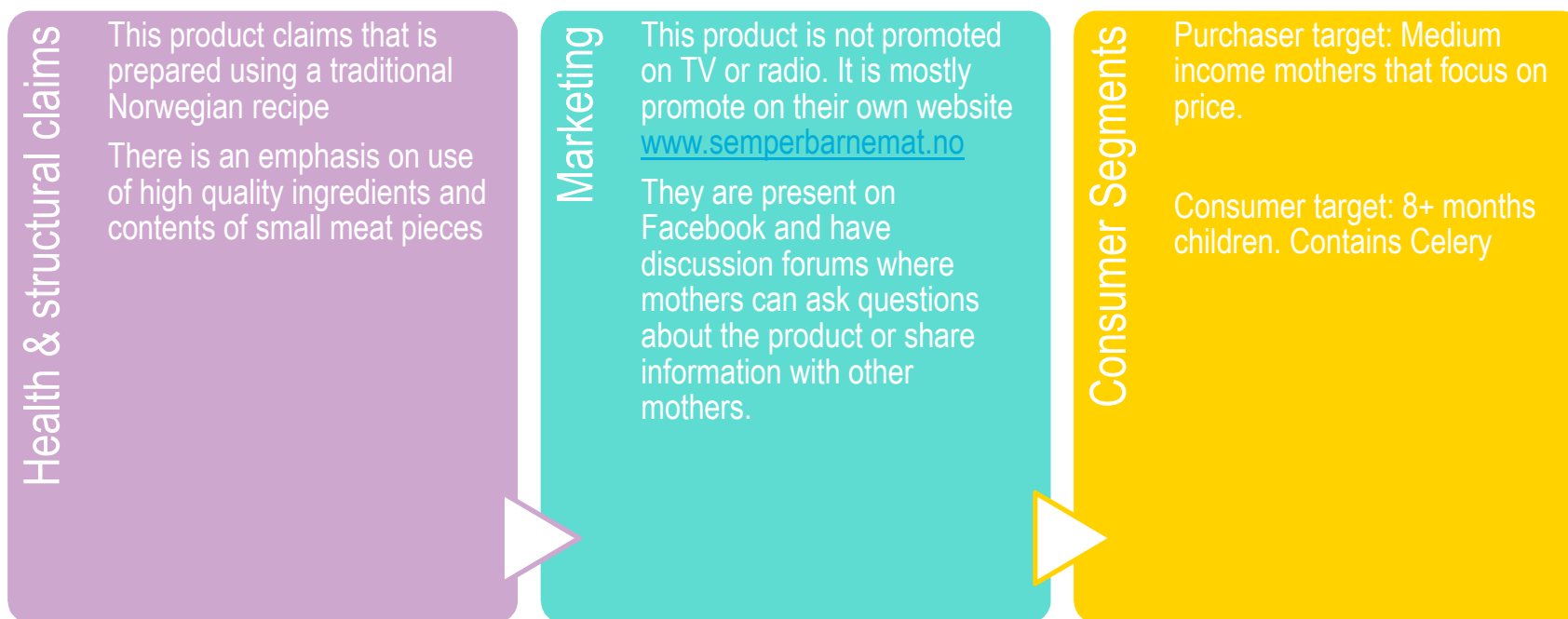
- The product does not appear to undermine the importance of breastfeeding
- The package and low price of the product target mothers of low to medium incomes that have busy lifestyles and find it difficult to freshly prepare meals .



## COUNTRY ANALYSIS: NORWAY

## MEAT BALLS/ KJØTBOLLER NORSKE FAVORITT: SMÅFOLK

*No real health claims; pushes use of high quality ingredients*



- The product claims that it is a supplement for a regular diet for 8 + month children. It offers a Norwegian classic recipe with fresh and natural ingredients
- The package is simple and targets mothers with medium income levels who focus on price
- Allergy warning: This product contains celery.

## COUNTRY ANALYSIS: NORWAY

**COUSCOUS WITH CHICKEN /COUSCOUS KYLLING: NESTLE**

*Positioned as a high quality meal with vitamins and protein to aid in overall development of 8 month + children*

**Health & structural claims**

The product claims to provide a good tasting meal which contains high quality ingredients

Further states that it contains a good source of oils that helps in the overall development of babies.

**Marketing**

Nestle do not market their products on TV or radio but they promote their products on their website

[www.nestlebarnemat.no](http://www.nestlebarnemat.no).

Nestle products are sometimes promoted in children magazines that target mothers.

Nestle is promoting their Nestle Club on the package and their website, where consumers can win points when buying several Nestle products.

**Consumer Segments**

Purchaser target: Low to medium income mothers that are price conscious as this product is more economical than others

Consumer target: 8+ months.  
Contains gluten

- The product claims that is a complete meal that is served to support/ complement a child's diet.
- It emphasises that it contains a good source of vitamins and proteins
- Allergy warnings: it contains gluten

## COUNTRY ANALYSIS: NORWAY

## MEAT STEW WITH VEGETABLES/BIFFGRYTE BY NESTLE

*A complete meal with good fatty oils made with local Norwegian recipe*



- This product does not state that it can replace breastfeeding.
- It positions itself more as a complete meal for babies, containing good content of healthy fatty oils for the well development of children.
- The package and low medium price range target low to medium income consumers that have little time to prepare meals from scratch.

## COUNTRY ANALYSIS: NORWAY

**CARROTS AND POTATOES/ GULROT MED POTET: HIPPI**

*A healthy introduction of food for small babies; positioned as supplementary to breastfeeding*

**Health & structural claims**

This product claims that it can be given to babies +4 months as a supplement when breastfeeding or for a gradual introduction of food to babies.

This product does not have any structural claims

**Marketing**

Hipp products are marketed in magazines that target mothers such as Gravid.

There are no marketing campaigns on the TV or radio.

Hipp promote this product on their website [www.hipp.no](http://www.hipp.no)

Social media platforms is strong with Hipp products and the product can be found on Facebook. The website states to always choose ecological products when buying baby products in supermarkets.

**Consumer Segments**

The target segments present in this product are consumers that regularly buy ecological products and are concern about chemicals or additives in baby products. They do not focus on price but quality.

Purchaser target: Medium income mothers to affluent mothers.

Consumer target: 4+ month babies

- This product do not undermines natural breastfeeding and states that this product is only a supplement for babies that are breastfeeding. The package targets medium to high income consumers that want to buy ecological products and are informed on the benefits on buying 100% organic products for their babies.

## COUNTRY ANALYSIS: NORWAY

## PASTA WITH VEGETABLES: ELLAS KITCHEN

*Positioned as a complimentary offering to children who are being breast fed already*

### Health & structural claims

This product claims that is nutritious and healthy as it contains 100% organic products.

The pasta does not contain additives or salt which is also recommended for babies.

This product is can be part of a regular diet of baby. No statement on this product being a replacement for breastfeeding.

### Marketing

The product is promoted in magazines such as Foreldre & Barn, BAM or other baby magazines that are targeting mothers.

Ellas Kitchen pasta is not promoted on TV or radio.

They are present in Facebook with 3000 likes . Ellas Kitchen offer information about their products while consumers can exchange reviews about products on Facebook.

### Consumer Segments

Purchaser target: Affluent mother and medium income mothers who are not price conscious as price points are above average

Consumer target: 6+month babies. Contains gluten and egg

- This product is a complement meal for babies that are being breastfed. They state that their pasta is a healthy option for babies that are starting to be introduced to food on their diets.
- Ellas Kitchen focus on stating that organic food is beneficial for children because it is without additives and chemicals.

## COUNTRY ANALYSIS: NORWAY

## PEAR PUREE/MIN FIRSTE PÆRE: NESTLE

*Brand positions itself as a complement to the baby diet – targeting 4+ month children*

### Health & structural claims

This product claim that is a good option for babies when they are initially introduced to food

It contains vitamin C which is good for babies, without added sugar, and it does not contain any preserves or colorants

### Marketing

This Nestle product is marketed on their website

[www.nestlebarnemat.no](http://www.nestlebarnemat.no)

This product is also promoted in baby and children magazines such as BAM, Klikk.no targeting mothers.

Nestle is not present in social media but they invite customers to join Nestle Club and earn points when buying products.

On the Nestle website, the company reflects WHO information stating that it is recommended that breast milk is the only nourishment for the first 6 months and Nestle fully supports this statement

### Consumer Segments

Purchaser target: Lower to medium income consumers mainly because of the economical price range of the product.. Targets parents who would like to supplement their child's diet

Consumer target: 4 + months and over.

- This product positions itself as being a complement of a regular baby diet. They state that the product is made with the highest quality and consistency using Norwegian local recipes.
- Labelling states “Min første pære” which means my first pear indicating that it can be seen as the first meal

## COUNTRY ANALYSIS: NORWAY

## RISOTTO WITH HERBS AND MEAT: NESTLE

*Brand targets 12 month + children and enforces that it is good for overall development of the child*

### Health & structural claims

This product claims that it contains a good source of oils without saturated fat and a good balance of Omega 3 which is beneficial for the overall development of children.

The green keyhole is a label that indicates to consumers that the product is a healthy option (criteria for using this symbol covers levels of sugar, salt, dietary fiber or saturated fats).

### Marketing

The product is promoted as being a Norwegian favourite due to its local recipe.

The product is marketed on the Nestle website [www.Nestlebarnemat.no](http://www.Nestlebarnemat.no)

The brand does not use social media extensively

Products such as this risotto is promoted occasionally in supermarkets and magazines such as BAM but not on TV or radio.

### Consumer Segments

Purchaser target: Low to medium income mothers due to its economical price range

Consumer target: 12 + month babies and over. Contains milk.

- Based on the good fat content of omega 3, the brand claims that it is good for the overall development of consumers
- It also markets itself based on the statement that it is a Norwegian recipe
- It has some extra labels stating that it is made in Norway and that contains low levels of salt and good content of fat.
- Allergy warnings: contains milk



## COUNTRY ANALYSIS: NORWAY

## TOMATO AND PASTA SOUP: HIPPI

*A tomato and pasta soup with natural ingredients and an innovative package design for 8+ month aged infants*



- This product states that it is a complement of a regular diet of a baby and is not replacing breastfeeding.
- The brand pushes the concept and benefits of selecting ecological products

## COUNTRY ANALYSIS: NORWAY

## VEGETABLE MIXTURE/GRØNSAKSPURE: NESTLE

*Positioned as being a good first meal product for a child over the age of 4 months*

### Health & structural claims

The product claims to be a good choice for 4 + month babies when they are first introduce to food.

This product claims that they use local recipes

Nestle also claims that the product has good fatty oils included.

### Marketing

Nestle do not market their products on TV or radio but they promote their products on their website

[www.nestlebarnemat.no](http://www.nestlebarnemat.no).

This product is occasionally promoted in magazines that target mothers

Is not present in social media in Norway

The package comes in a small portion, suitable for babes over 4+ months with a blue baby bear on logo on the front

### Consumer Segments

The target segments present in this product are consumers that want to offer to their babies a simple and nutritious food alternative that can be use for lunch or dinner.

Purchaser target: Low to medium income consumers because of the low price range of this product. Appeals to parents who would like to supplement their child's diet

Consumer target: 4+ months babies. Also fine for babies with gluten allergy

- The product states that is a complement of a regular baby diet and can be introduced at 4+months of age  
The package promotes the product as being suitable for the first meal of a baby
- The price of the product is economical and therefore targets low to medium income consumers that are price conscious.

## COUNTRY ANALYSIS: NORWAY

## YOGURT WITH FRUITS/ YOGURT MED FRUKT: DANONE

*Enables introduction of yogurt to the child's diet without additives, dyes or sugar*

### Health & structural claims

This product claims that it contains vitamin D and Calcium #

They also claim that the product does not have any additives, dyes or sugar.

They do not claim any structural benefit by eating this product.

### Marketing

This product is marketed in supermarkets, magazines that target mothers with small children and on their own website [www.danonino.no](http://www.danonino.no).

There are no marketing campaigns on TV and radio.

Social media is almost not existent. They are in Facebook but have only 7 people that like the site.

The package is practical and unique in the market - offering small size servings ideal for a snack or dessert

### Consumer Segments

Purchaser target: The package, brand and price range appeals to medium and high income consumers

Consumer target: 18 + months babies. It is not suitable for babies with milk allergies.

- The product does not make any statement about the importance of natural breastfeeding – perhaps because it is for 18+months children
- The product does not claim any particular health or structural claim
- Danone is a well know brand that is know for being a product that has unique taste and a creamy texture.

INTRODUCTION

EXECUTIVE SUMMARY

COUNTRY ANALYSIS: NORWAY

STORE AUDITS: NORWAY

PRODUCT PROFILES: NORWAY

**COUNTRY ANALYSIS: BRAZIL**

STORE AUDITS: BRAZIL

PRODUCT PROFILES: BRAZIL

APPENDIX



## COUNTRY ANALYSIS: BRAZIL

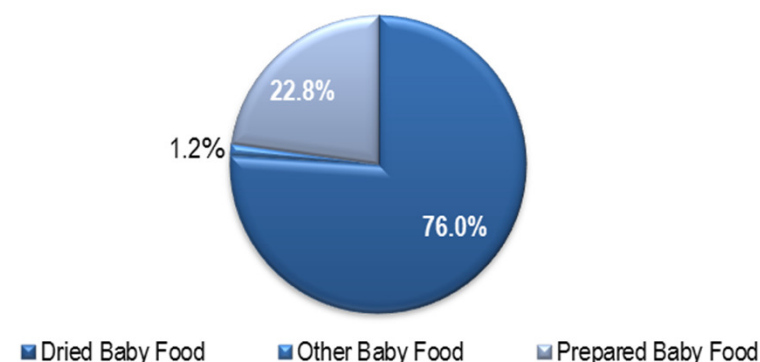
## MARKET OVERVIEW

*The market is growing due to favourable demographics*

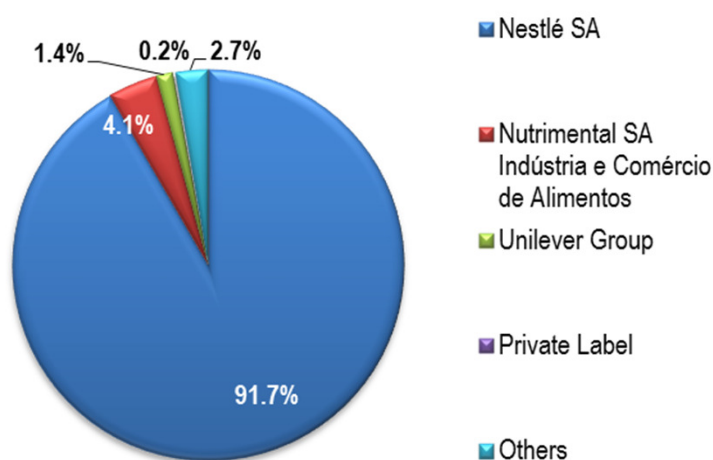
## Key Takeaways

- Consolidated market that has always been led by Nestlé, which currently is losing market share on different fronts to new competition/entrants.
- Dried Baby Food key players include Nestlé, Danone and Mead Johnson. Abbott is another key player with strong presence in the pharmacy channel. Prepared Baby Food key player is Nestlé alongside new entrant Heinz. Other Baby Food category has Unilever, Pepsico and Nestlé as main players and Heinz as new entrant.
- All three categories show growth prospects as the Brazilian population is growing, consciousness of healthy feeding is now a reality and purchase power parity is higher for the population. However, Dried Baby Food still leads the segment

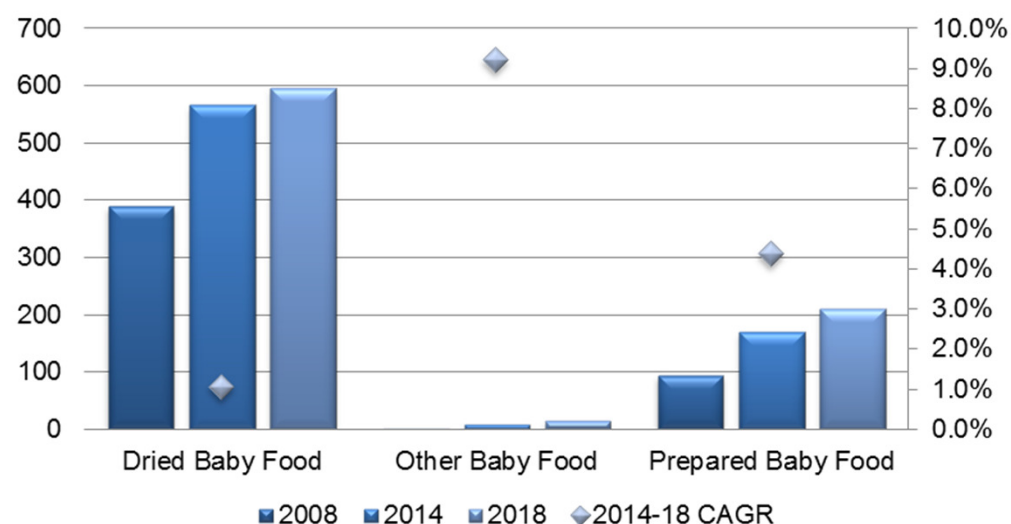
## Category % value split 2014



## Company value % share of 3 categories combined 2014



## Category \$MN size 2008, 2014, 2018 and 2014-2018 CAGR



COUNTRY ANALYSIS: BRAZIL

## BABY FOOD CONSUMPTION – KEY TRENDS

*Decision maker consumers (moms) are well informed and more conscious of healthy habits for their young children*

### Mothers increasingly play decision maker

- Mothers are decision makers in buying products, even more because they are gaining professional independence in Brazilian society (more women working), so they choose products regardless of price or husband's opinion

### Product labelling increases in importance

- Increased awareness from mothers tend to influence them to read more product labels before purchasing
- The government has a big focus on transparency and labelling, further increasing customer awareness

### Busy customer lifestyle

- The baby food market has growth potential, especially because more women are dedicated to their careers and so tend to buy more prepared baby and children food products because it is convenient, saves time and there is a great variety of food products on the market, especially for babies over 6 months of age

### Social media is key in marketing

- Direct marketing is becoming a large element of brand marketing, which social media is the perfect platform for especially considering commercial ads are restricted for breastfeeding substitute products

### Sustainable and ethical

- Brazilian society is going through the process of increased awareness to sustainability, organic products and procedures

### Brand innovation

- Renowned companies are entering this market and giving consumers more product options.
- Amongst new product options, companies such as Heinz are investing/betting heavily on new types of packages not yet commonly and widely seen in the Brazilian market – retorted / flexible pouches, a type of package largely used in other countries.



## COUNTRY ANALYSIS: BRAZIL

**LEGISLATION, BRAND POSITIONING AND SOCIAL MEDIA**

*Legislation is strong and enforced; it demands that brands are transparent with their claims and in providing pro-breast feeding advice to customers*

**Legislation**

- Legislation is created by the Ministry of Health and monitored by ANVISA, a national government body. The Brazilian norm for commercialization of foods for infants and young children include special features regarding potential breastfeeding substitute products.
- The norms impose limits of nutritional values for vitamins and minerals (there is a maximum level for vitamins and minerals within an overall ingredient composition of a product), prohibits commercial promotion on TV and radio other than in specialized media (e.g. Magazines for paediatricians) and to health professionals (mainly doctors and nutritionists mainly, but also nurses).
- Packages have enforcements with warnings and notice messages, sometimes even mentioning Ministry of Health.
- For prebiotic & probiotic products it will be obligatory to have a warning that it cannot be consumed by premature babies, babies with deficiencies in their immune system or heart disease.
- Prohibition of hydrogenated fat (up to 3 years of age) and honey (up to 1 year of age) - for milk substitute products.

**Social Media**

- Social Media is to some degree a loophole to the restrictions for commercial promotion to reach purchase decision makers
- Social Media plays a strong role in the link between consumer and branding
- Forums and Blogs are very dynamic as consumers share information
- Companies tend to use social media such as Blogs to enable information access to consumers.
- Social Media information access has revolutionized clinic visits as consumers are more active and questionable when consulting paediatricians and nutritionists
- Companies tend to use games and fun activities within brand's websites to bond with young consumers

**Brand Positioning**

- Brands are realistic and transparent with their claims respecting legislative rules
- Most products are clearly complementary and not meant to be substitute breastfeeding products – there seems to be no inappropriate marketing activity or claims which could confuse or misconstrue the purchasers
- Brands interact with their consumers mainly through health professionals (doctors, nutritionists and nurses) and social media
- In an effort to minimise the undermining of breastfeeding, brands will advise that it is important to introduce alternative types of food only after a certain age (e.g. above 6 or 12 months of age) and that the products should be used under professional health orientation (indication from doctors and nutritionists mainly – in this case nurses do not play such role).

INTRODUCTION

EXECUTIVE SUMMARY

COUNTRY ANALYSIS: NORWAY

STORE AUDITS: NORWAY

PRODUCT PROFILES: NORWAY

COUNTRY ANALYSIS: BRAZIL

**STORE AUDITS: BRAZIL**

PRODUCT PROFILES: BRAZIL

APPENDIX





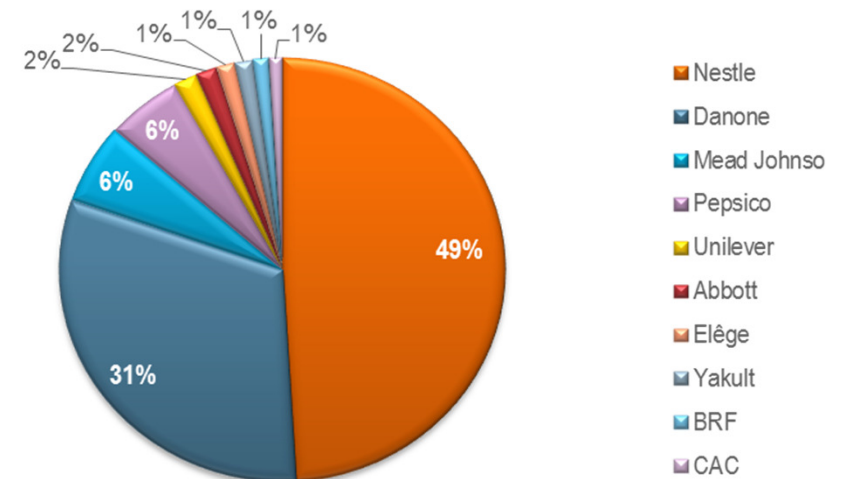
## STORE AUDITS

# A TOTAL OF 551 PRODUCTS WERE IDENTIFIED ACROSS 10 STORES

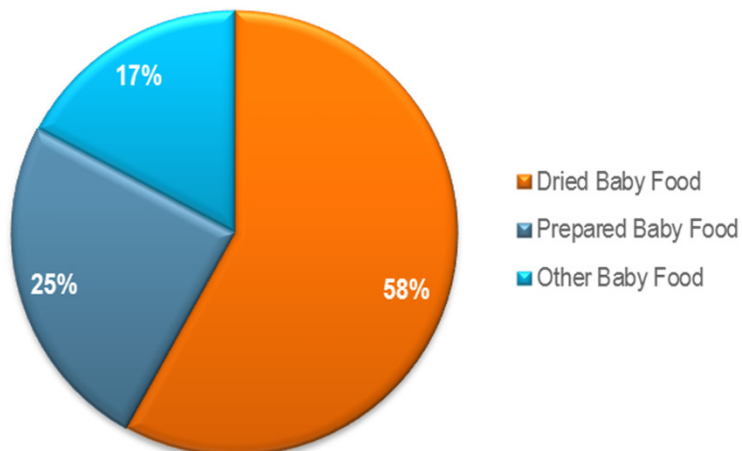
## 10 Audits conducted



## Total products (551) coverage by company



## Total products (551) coverage by category



## Key takeaways

- Nestle invests heavily on merchandising, brand coverage within a display or presence in different aisles of an outlet and premium positioning.
- More recently, new entrants in this segment threaten Nestlé's market share.
- Pharmacies have grown as sales channel for these products over the years. The reason is that pharmacies have become a more complete point of sale widening product mix offering, including all types of products for babies.
- New entrants to gain significant market share are, Heinz and Abbott.

## COUNTRY ANALYSIS: BRAZIL

## MAIN MESSAGE ABOUT HEALTH CLAIMS

*Health claims are very strong indicators of products as the segment is heavily regulated.*

### Allergy

- Overall, there are a range of products that are gluten free, as this is a growing concern of overall nutritional ingredient composition of food products in general in Brazil.
- Most products have artificial flavouring, although some contain synthetic flavouring identical to natural flavouring.
- There is a small range of lactose free products available as per audited products, it is a very specific and niche public targeted.
- Some products may contain traces of milk, which may bring about food intolerance, for this reason it is informed on the label.

### Vitamins

- Products tend to promote the content of vitamins and minerals in terms of formula composition
- Usually products use expressions such as: Source of Vitamins and Minerals / Rich in Vitamins and Minerals / enriched with Vitamins etc.

### Health claims

- One key health/ structural claim that is made is that the product contributes to the intestinal flora equilibrium.
- Usually products have clear notices: Important Warning: This product should only be used to feed children below 1 (one) year of age with expressed medical or nutritionist orientation. Maternal breast feeding avoids infections and allergies and strengthens bonding between mother and child
- Added sugar / no added sugar and reduced salt are commonly used expressions on health claims on product labelling as there is a growing concern in Brazil around obesity (currently the country is the 5<sup>th</sup> worldwide to suffer with obesity).

### POS Marketing and label design

- Some point of sales are cautious enough to place signs regarding Ministry of Health notices, this may be as per either brand or outlet initiative. It helps with awareness of consumers.
- Label designs usually have health related claims/ notifications to customers; there is rarely a baby food product that does not have this element to their package labeling

INTRODUCTION

EXECUTIVE SUMMARY

COUNTRY ANALYSIS: NORWAY

PRODUCT PROFILES: NORWAY

COUNTRY ANALYSIS: BRAZIL

**PRODUCT PROFILES: BRAZIL**

APPENDIX



## COUNTRY ANALYSIS: BRAZIL

## MILNUTRI CEREALS: DANONE

*Milnutri is directed toward 6 month + old babies and is said to be a good introduction to complementary food*

## Health &amp; structural claims

Milnutri Cereal line of products claim to have 13 vitamins and minerals, to be a source of calcium and to be the only powder cereal form product with no sodium.

The product claims that it can be introduced for feeding babies and contains nutrients that will help them to grow and learn.

Claims are backed by studies and data from: Nutritional Studies, FAO, Paediatrics, WHO and Nutritional Comparison of category's marketed products in 2014.

## Marketing

Online and Print Media platforms are being used.

Magazines: Pediatra Moderna , Pais e Filhos.

Online: Officially the brand's strategy stands on its website, Instagram, Facebook, Twitter, and YouTube.

Social media is recently being inserted into the marketing strategy since the product was launched in November 2014.

Launching of platform Grow and Learn to interact with final consumers

## Consumer Segments

Purchaser target: Cautious parent from middle class as this product is a more specialized product in terms of vitamins and minerals delivery and its price

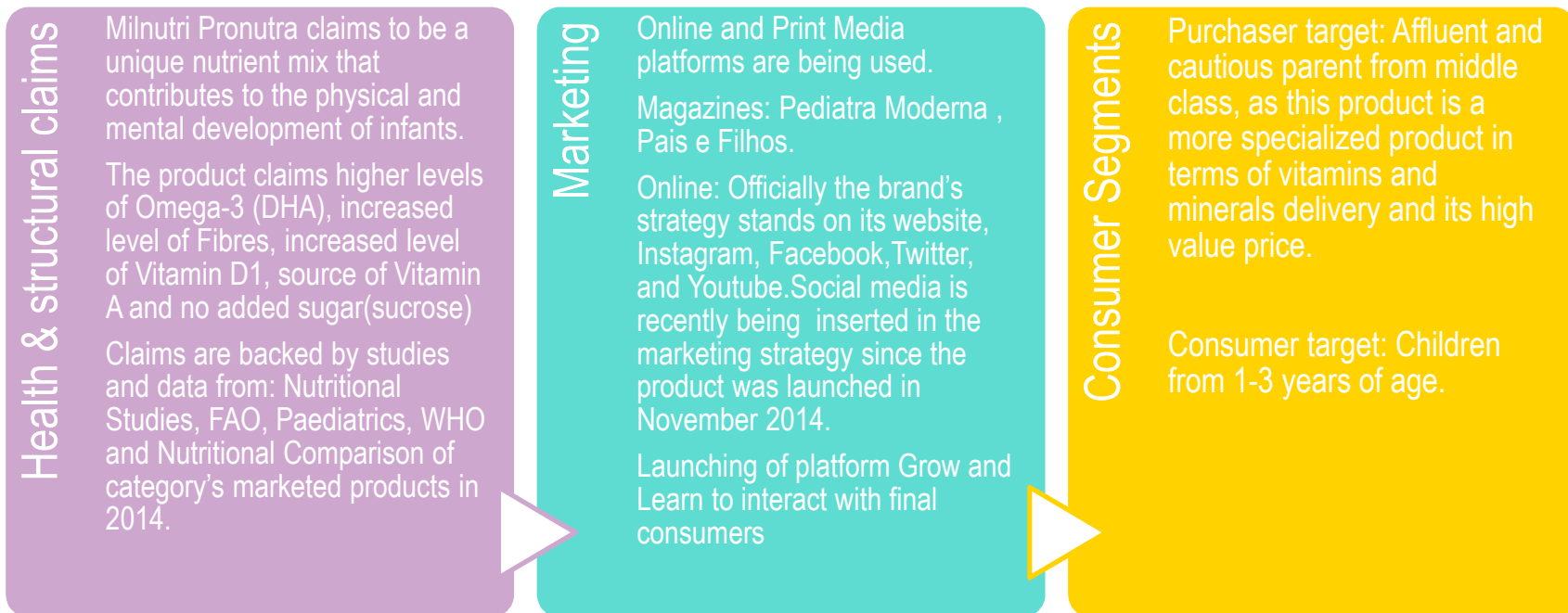
Consumer target: Directed to children from 6 months of age to 5 years of age.

- Natural breastfeeding is not undermined as the brand mentions on labels the importance of breast feeding and to introduce complementary/other types of food after 6 months and not before
- Milnutri brand proposes to bring healthy nutrition adapted to the children's needs, contributing to the little consumers' growth and learning every day.
- Amongst main health and structural claims is the development of cognitive aspects for learning and growth
- Milnutri brand launched the platform "Grow and Learn" a source of parent support with content developed by experts in child development and activities for parents and children to do together. It is delivered as an app for phones and tablets.
- This product was developed especially for the Brazilian market based on the findings of an exclusive study called Nutriplanet

## COUNTRY ANALYSIS: BRAZIL

**MILNUTRI PRONUTRA: DANONE**

*Milnutri contains nutrients that are said to contribute to growth and learning of infants*



- Natural breastfeeding is not undermined as the brand mentions on labels the importance of breast feeding and unsuitable for feeding children under 1 year of age
- Amongst main health and structural claims is the development of cognitive aspects for learning and physical growth

## COUNTRY ANALYSIS: BRAZIL

**APTAMIL 1: DANONE**

*Product is positioned as a substitute to breast feeding only if this is not an option*

**Health & structural claims**

Aptamil 1 milk claims to contain prebiotics (GOS and FOS) that favour the immune response of the baby

The product is 98% vegetable fat digestible. Suitable for infants from zero to six months. Its carbs are 100% lactose (milk sugar)

Contains Vitamins A and C, Iron and Zinc.

Claims scientific backing from paediatric articles, studies and nutrition guides from the Brazilian Paediatric Association.

**Marketing**

Marketing promotion on specialized media such as magazine "Pediatria Moderna"

Online strategy includes the brand's website, Instagram, Facebook, Twitter, and YouTube presence.

**Consumer Segments**

Powder Mix for Milk customer segment, targeting purchaser profile of affluent due to high value product pricing and cautious mother incapable of breastfeeding or as complement.

Consumer target: Suitable for infants from zero to six months as substitute option when breast feeding is not possible or for complementing breastfeeding.

- Natural breastfeeding is not undermined as the brand mentions on labels the importance of exclusive breastfeeding for the first six months to 2 years of age. It is remarked as substitute only in case of incapability for breastfeeding .
- Aptamil 1 provides a more complete nutrition with its ingredient composition helping metabolic programming which is defined in the first years of life, generating permanent effects in the child's structure, physiology and metabolism. This claim helps Aptamil 1 affirm its position as a complementary product to breastfeeding and not a substitute product.



## COUNTRY ANALYSIS: BRAZIL

**DANONINHO: DANONE**

*No specific health or structural claim is made; the product is rich in calcium and vitamins D & E*



- This product does not undermine natural breastfeeding as it is targeted for preschool aged consumers mainly, its proposal is more of a snack type of product
- Using green dinosaur Dino as brand mascot, a friendly figure facilitates the approach towards children.
- Regarding the new app for Danoninho brand, besides encouraging physical activity among children, parents can also use it to think of new ways to interact with their children.



## COUNTRY ANALYSIS: BRAZIL

**DANONE – TURMA DA MÔNICA: DANONE**

*Fruit yoghurt for children but no age specified and no real health or structural claims made*



- This product does not undermine natural breastfeeding, its purpose is as a normal yoghurt but directed to children.
- Amongst marketing strength is the bonding built with young consumers by using famous cartoon figure characters.

## COUNTRY ANALYSIS: BRAZIL

**BATAVINHO: BRF**

*No age specified but the product is positioned as a complementary children's snack*

**Health & structural claims**

Fruit Pulp, no artificial additives and source for Calcium and Vitamins A & D.  
2 cups of petit suisse cheese quark is equivalent to 200ml of Calcium from milk.

**Marketing**

The product marketing strategy is not very strong. As it is not considered to be a leading brand for this product category. The strategy is more focused on point of sale pricing.

The manufacturer has a Facebook page, but it is not solely directed to Batavinho petit suisse cheese quark product. It is also present on Twitter.

The brand has a boy mascot with the purpose to make the product child friendly.

**Consumer Segments**

Customer segments include petit suisse cheese quark within prepared food category. Usually purchase decision maker are parents.

Consumer target: No specified age. Appeal for children overall.

- This product does not undermine natural breastfeeding it does not have any specific comment or saying regarding this matter. Its purpose is as complementary food for children as snacks.
- The persuasion methods is through words and affirmation that the product is as nutritive as 200ml of milk, considering calcium.

## COUNTRY ANALYSIS: BRAZIL

## CAPRILAT - RTD: CCA

*The age target is undefined*

### Health & structural claims

Caprilat is made from goat's milk and is enriched with Folic Acid (Vitamin B9).

One glass has 29% of daily Calcium needs.

Goat's milk has better digestive absorption compared to cow milk, consequently more calcium and protein nutritive.

Reduces risks of anemia with enriched composition of Folic Acid.

### Marketing

Social media is widely explored through Facebook page which has over 32 thousand likes. The brand also has a presence in Twitter although it is very weak/poor performance with no more than 300 tweets since 2012.

Caprilat has promotion banners through retailers on magazines directed to children such as magazines: Crescer (online).

### Consumer Segments

Customer segments include those wishing for a healthier milk, soft and higher tolerability.

Purchaser target – Affluent mother, cautious as it is an expensive product compared to others and is also used by consumers with cow milk intolerance.

Consumer target – age target is undefined. Focused on allergic to cow milk proteins consumers.

- This product does not undermine natural breastfeeding, it has a clear message on the package - Important Warning: This product should not be used to feed children below 1 (one) year of age with expressed medical or nutritionist orientation. Maternal breast feeding avoids infections and allergies and strengthens bonding between mother-son. Besides this, it is seen as cow milk substitute product.
- Goat's milk has better digestive absorption compared to cow milk. This characteristic improves absorption of proteins and vitamins such as calcium and proteins. Besides being naturally nutrient rich, Caprilat has been enriched with Folic Acid, important vitamin from complex B that reduces risks of anemia.

## COUNTRY ANALYSIS: BRAZIL

**CAPRILAT – POWDER MIX: CCA**

*Although the consumer target has no age specification, the product is clearly referenced to Ministry of Health guidelines with regard to breast feeding*

**Health & structural claims**

Caprilat is made from goat's milk and is enriched with Folic Acid (Vitamin B9).

One glass is said to provide 29% of daily Calcium needs.

Goat's milk has better digestive absorption compared to cow milk, consequently more calcium and protein nutritive.

Reduces risks of anemia with enriched composition of Folic Acid.

**Marketing**

Social media is widely explored through Facebook page which has over 32 thousand likes. The brand also has a presence in Twitter although it is very weak/poor performance with no more than 300 tweets since 2012.

Caprilat has promotion banners through retailers on magazines directed to children such as magazines: Crescer (online).

**Consumer Segments**

Customer segments include those wishing for a healthier milk, soft and higher tolerability.

Purchaser target: Affluent mother, cautious as it is an expensive product compared to others and is also used by consumers with cow milk intolerance.

Consumer target: Age target is undefined. Focused on allergic to cow milk proteins consumers.

- This product does not undermine natural breastfeeding, it has a clear message on the package - Important Warning: This product should not be used to feed children below 1 (one) year of age with expressed medical or nutritionist orientation. Maternal breast feeding avoids infections and allergies and strengthens bonding between mother-son. Besides this, it is seen as cow milk substitute product.
- Goat's milk has better digestive absorption compared to cow milk. This characteristic improves absorption of proteins and vitamins such as calcium and proteins.

## COUNTRY ANALYSIS: BRAZIL

**HEINZ – PUREED BABY FOOD: HEINZ**

*Heinz's reference to Ministry of Health in terms of breastfeeding appears to be consistent across relevant products*



- This product does not undermine natural breastfeeding because it has a clear message on the package - The Ministry of Health warns: this product should not be used for children below 6 (six) months of age, unless expressed by medical or nutritionist orientation. Maternal breast feeding avoids infections and allergies and is recommended until 2 (two) years of age or more.
- Heinz is a new entrant on Baby Food segment in Brazil.

## COUNTRY ANALYSIS: BRAZIL

## RTD FRUIT JUICE: HEINZ

*Ministry of Health warnings are made clear on the packaging of the product*



- This product does not undermine natural breastfeeding because it has a clear message on the package - The Ministry of Health warns: this product should not be used for children below 6 (six) months of age, unless expressed by medical or nutritionist orientation. Maternal breast feeding avoids infections and allergies and is recommended until 2 (two) years of age or more.
- Heinz is a new entrant on Baby Food segment in Brazil and is betting on differentiated packaging proposals with flexible retorted pouches packaging.

## COUNTRY ANALYSIS: BRAZIL

**SUSTAGEN KIDS: MEAD JOHNSON**

*The product promises a 'complete nutrition' however does not undermine the advantages of breast feeding*



- This product does not undermine natural breastfeeding however it does not have any warning or comment regarding or referencing breast feeding.
- Mead Johnson invests heavily on health professional promotion and events/congresses sponsoring paediatricians.



## COUNTRY ANALYSIS: BRAZIL

## CA – PUREED BABY FOOD: NESTLE

*Transparent about the guidelines as set by the Ministry of Health*



- This product does not undermine natural breastfeeding as it has a clear message on its package - The Ministry of Health warns: this product should not be used for children below 6 (six) months of age, unless expressed by medical or nutritionist orientation. Maternal breast feeding avoids infections and allergies and is recommended until 2 (two) years of age or more.
- Sponsors the Brazilian Pediatrician Society and workshop/courses for pediatricians.

## COUNTRY ANALYSIS: BRAZIL

## LEG – PUREED BABY FOOD: NESTLE

*The manufacturer website quotes guidelines provided by the Ministry of Health relating to breastfeeding*

## Health &amp; structural claims

No Added Salt, Gluten Free.  
In Nestlé's website it quotes the Ministry of Health: After 6 (six) months of age, continue breast feeding your child and offer new food.

## Marketing

Social media is being widely used by the product in the marketing strategy as it has a YouTube channel, an Instagram account with over 2 thousand followers and a Facebook page with almost 800 thousand likes and a blog – Vida de Mãe (mother's life). Besides this, the product is widely mentioned in articles in for pais e filhos and crescer magazines. The brand still is displayed in Nestlé's website and has a special site dedicated to the brand.

## Consumer Segments

Purchaser target: Affluent mother, as it is not a cheap product for everyday consumption .  
Consumer target: 8+ months

- This product does not undermine natural breastfeeding as it has a clear message on its package - The Ministry of Health warns: this product should not be used for children below 6 (six) months of age, unless expressed by medical or nutritionist orientation. Maternal breast feeding avoids infections and allergies and is recommended until 2 (two) years of age or more.
- Sponsors the Brazilian Pediatrician Society and workshop/courses for pediatricians.

## COUNTRY ANALYSIS: BRAZIL

**MUCILON – FOOD MIX: NESTLE**

*Besides having vitamins and minerals, the product also has probiotics which are claimed to be important for a healthy intestinal flora and a balanced diet*

**Health & structural claims**

Contains Gluten and traces of milk. It is rich in 9 Vitamins including A and C and Zinc and Iron.

The product helps digestion, It contains NutriPROTECT +, a unique combination of probiotic Bifidus BL and essential nutrients like Zinc, Vitamin A, Vitamin C and Iron

As Lactobacilli, Bifidobacteria Bifidus BL is a probiotic similar to those found in the digestive system and is part of a healthy intestinal flora.

**Marketing**

Social media is being widely used by the product in the marketing strategy as it has a YouTube channel, an Instagram account with over 2 thousand followers and a Facebook page with almost 800 thousand likes and a blog – Vida de Mãe (mother's life). Besides this, the product is widely mentioned in articles in for pais e filhos and crescer magazines. The brand still is displayed in Nestlé's website and has a special site dedicated to the brand.

**Consumer Segments**

Purchaser target: Affluent mother, Cautious

Consumer target: It is specific for complementary feeding of children from 8 months and a great option for intermediate snacks.

- The product targets infants from 8 months +, however it specifically aligns to the explicit Ministry of Health warning that breast feeding should be on-going even after 6 months, but new food should be introduced to the child.
- The brand sponsors the Brazilian Pediatrician Society and workshop/courses for pediatricians.
- The infant cereal Mucilon is indicated as a complementary food for children from 8 months of age. Mucilon is part of Nestlé Nutrition Program, which aims to give children the nutrition required for proper development in the early years of life. Mucilon Rice and Corn Mucilon are for children who are able to accept the semi-solid food contributing to the development of the infant.

## COUNTRY ANALYSIS: BRAZIL

**NESCAU: NESTLE**

*Aside from providing a source of vitamins, calcium and iron the product makes no specific health or structural claims*

**Health & structural claims**

Gluten Free, contains whey.  
This product is a milk drink and is a source for Vitamins, Calcium and Iron.

No specific health claims other than content claims for the product.

Overall claim by its slogan is that it provides energy,

**Marketing**

Nescau brand is consolidated in Brazil as it has reached 65% of homes

Nowadays there has not been much promotion on TV channels as there once used to be; the brand is so strong that it has been extended to other food categories. There is a lot of print media ads and a Facebook page with over 2 million likes.

**Consumer Segments**

Purchaser target: Affordable product for all classes, although middle class upwards is main focus.

Consumer target: No target age specified, overall appeal for children and teenagers, although it may also be consumed by other age ranges, such as young adults and adults.

- This product does not undermine natural breastfeeding; it makes no references towards breastfeeding
- Nescau is a leader product in its category in the Brazilian market.

## COUNTRY ANALYSIS: BRAZIL

**NESTON: NESTLE**

*This product targets a wide age group with no specific intention to cater to babies between 0-2 years*



- This product does not undermine natural breastfeeding it does not have any warning or comment regarding or referencing breast feeding
- Rich in Vitamins and a source of calcium
- In 2008, one of the most important trademarks of Nestlé celebrated half a century of very successful with a total new look in Brazil

## COUNTRY ANALYSIS: BRAZIL

**TODDY – POWDER MIX FOR MILK: PEPSICO**

*No specified age for consumption; positioned as supplementing the nutrition of children and early teenagers*



- Unspecified target age, but product appeal is to supplement the nutrition of children and early teenagers but there is no link to breast feeding particularly for the first 2 years of a child's life

## COUNTRY ANALYSIS: BRAZIL

**MAIZENA: UNILEVER**

Wide potential age demographic with no real age specification or reference to breast feeding

**Health & structural claims**

Versatile and nutritious.

No specific health claims other than claims that it may be used for various cooking purposes.

**Marketing**

'Makes more than you can imagine' – slogan.

This is a consolidated brand that needs no promotion at all to sell.

The brand Maizena has a website/hotsite with recipes and other information regarding its product lines. Besides this it has a video blog with recipes. Last Tv ads were in 1994, radio campaigns were made from 1992-1998. Last printed ad was in 2003.

**Consumer Segments**

Customer segments for this product are wide possibilities within food preparation. Generations were created with porridge, biscuits, sweets and sauces based on this fine ingredient.

Purchaser target: A mass affordable product.

Consumer target: No age target specified. This is not a solely baby/child food product, it is widely used in diverse purposes.

- This product is positioned neither as a substitute and nor as a complementary product to breast feeding
- This brand has become synonymous of corn starch.
- Passed from generation to generation, brand and cornstarch products are found in 80% of Brazilian homes, in addition to being present in more than 100 countries around the world.