

# CHOCOSUISSE-Bulletin 2023 (Business year 2022)

**Domestic sales of Swiss chocolate in 2022 have not yet recovered from the pandemic low. Thanks to the export business, more Swiss chocolate was sold overall than in the previous year, but high raw material prices are posing value creation challenges for Switzerland as a manufacturing nation.**

## **Total sales**

Overall, the volume of Swiss chocolate sold on the domestic market and abroad increased by 4.7% in 2022 compared to the previous year thanks to exports, and the turnover generated by it rose by 6.4%. The export business thus once again proved to be a pillar of support for Swiss chocolate manufacturers. But competitive pressure internationally is high. “Swiss chocolate manufacturers are all the more dependent on non-discriminatory access to procurement and sales markets and on the compensation of border protection disadvantages,” says Urs Furrer, Director of CHOCOSUISSE.

## **Domestic market**

The volume of Swiss chocolate sold domestically decreased by 4.0% in 2022 compared to the previous year, while sales increased overall by 4.0%. On balance, the domestic market has not yet recovered from the pandemic slump: the volume of Swiss chocolate sold domestically (-4.7%) and the turnover generated by it (-4.9%) remained lower in 2022 than in 2019. Following the previous year’s dramatic increase in chocolate imports – in excess of more than 10% – imports declined only marginally (-1.5%) in 2022. “The pressure from cheaper goods produced abroad remains high, and Swiss consumers’ loyalty to domestic products is limited,” says Daniel Bloch, Vice-President of CHOCOSUISSE.

## **Export / cost trend**

In 2022, 73.1% of Swiss chocolate was exported. The export volume increased by 8.3%, while export revenues grew by 8.4%. “The increased turnover in the export market was unable to compensate for the rise in costs. The price of Swiss sugar more-or-less doubled in 2022,” says Beat Vonlanthen, President of CHOCOSUISSE. “This is an even clearer demonstration that the border and price protection for sugar set by Parliament is not fit for purpose.”

*The statistical data in this Bulletin covers the entire Swiss chocolate industry.*

<b>Sales of Swiss chocolate products (domestic and export)</b>				
Source: Chocolate manufacturers				
	2020	2021	2022	
	t	t	t	%
Bars and small formats	101,726	109,213	116,329	56
Chocolate confectionary	31,123	34,570	38,401	19
Seasonal items	9,187	9,321	8,513	4
Coatings/couvertures	37,175	43,337	42,429	21
Powder	763	659	675	0
<b>Total</b>	<b>179,974</b>	<b>197,100</b>	<b>206,347</b>	<b>100</b>

Of these products, 27 % were sold in Switzerland and 73 % exported to 138 countries. These Swiss exports should not be confused with the far greater production of chocolate with Swiss labels by branches, subsidiaries and licensees operating abroad.

<b>Chocolate imports</b>				
Source: Swiss Federal Customs Administration				
	2020	2021	2022	
	t	t	t	%
Germany	15,964	17,054	17,431	44
France	5,363	5,496	5,650	14
Netherlands	4,856	5,328	5,136	13
Italy	2,849	3,099	3,386	9
Belgium	2,134	2,845	2,291	6
Poland	1,093	1,074	1,252	3
from 104 other countries	5,203	5,336	4,487	11
<b>Total</b>	<b>37,462</b>	<b>40,232</b>	<b>39,633</b>	<b>100</b>

<b>Employment in the Swiss chocolate industry</b>			
Source: Employment statistics (Swiss Federal Statistical Office)			
	Women	Men	Total
1980	2,277	2,806	5,083
1990	2,648	2,588	5,236
2000	2,074	2,183	4,257
2010	1,916	2,325	4,241
2020	2,097	2,298	4,395
2021	2,073	2,305	4,378
2022	2,154	2,371	4,525

<b>Turnover by the Swiss chocolate industry with Swiss chocolate products</b>			
Source: Chocolate manufacturers			
	2020	2021	2022
	in Mio. CHF	in Mio. CHF	in Mio. CHF
Domestic sales	727	783	815
Exports	802	926	1'004
<b>Total</b>	<b>1'529</b>	<b>1'709</b>	<b>1'819</b>

<b>Average import prices of the most important raw materials (duty unpaid)</b>			
Source: Swiss Federal Customs Office			
	2020	2021	2022
	CHF	CHF	CHF
100 kg cocoa beans	269	300	288
100 kg cocoa butter	568	555	464
100 kg sugar	50	55	62
100 kg hazelnuts	676	644	608
100 kg almonds	717	606	623
100 kg whole milk powder *	462	650	719

\* Corresponds to the import price of the 300 tonnes import quota of milk powder which is sold annually by auction since 1 January 2009. The price for domestic whole milk powder in 2022 was on average CHF 668.-- for 100 kg.

<b>Developments in the average retail price</b>			
Source: National retail price index (Swiss Federal Statistical Office; Basis December 1982, extrapolation)			
	1983	2021	2022
Chocolate	100.2	123.9	123.2
Overall index	100.9	159.5	164.0

<b>Per capita consumption</b>					
Sources: Chocolate manufacturers, Caobisco					
The Swiss like chocolate. With a domestic consumption of around 96,500 tonnes of chocolate products and an average population of 8,8 million people, the average per capita consumption adds up to 11.0 kg, thereby ranking Switzerland at the head of consumer countries. For comparison purposes, the figures from other countries:					
	kg		kg		
Switzerland	2022	11.0	Spain	2021	4.0
Germany	2021	9.2	Croatia	2021	3.5
Estonia	2021	8.8	Portugal	2021	3.5
Denmark	2021	8.7	Latvia	2021	3.4
Finland	2021	8.1	Sweden	2021	3.3
Belgium	2021	5.8	Italy	2021	3.1
Lithuania	2021	5.4	France	2021	2.2
Slovakia	2021	4.8	Hungary	2021	2.2
Romania	2021	4.1	Greece	2021	1.0

<b>The most important export markets</b>				
Source: Swiss Federal Customs Administration				
	2020	2021	2022	
	t	t	t	%
EU / EFTA	72,203	65,389	74,565	53
Germany	24,351	25,689	29,854	21
Canada	11,224	11,791	13,719	10
France	13,126	12,949	12,982	9
United Kingdom	11,697	10,535	9,945	7
USA	7,168	7,837	9,195	7
Spain	2,133	3,492	5,904	4
Belgium	2,817	4,240	5,104	4
Italy	5,480	4,575	4,897	3
Australia	5,187	5,049	4,878	3
China	3,106	4,151	3,908	3
Austria	2,353	2,173	2,416	2
Netherland	1,759	1,241	2,379	2
126 other countries	25,463	32,334	34,857	25
<b>Total *</b>	<b>115,864</b>	<b>126,056</b>	<b>140,038</b>	<b>100</b>

<b>Worldwide grinding of cocoa beans 2021/2022</b>		
Source: International Cocoa Organization (Bulletin No. 1, March 2023)		
	tons	%
Europe	1'845'800	36.5
-Netherlands	630'000	12.5
-Germany	480'000	9.5
-France	140'000	2.8
-Spain	100'000	2.0
-United Kingdom	100'000	2.0
-Belgium	95'000	1.9
-Italy	85'000	1.7
-Switzerland	55'000	1.1
Asia and Oceania	1'144'900	22.6
Africa	1'133'600	22.4
North America	480'000	9.6
Central and South America	452'400	8.9
<b>Total</b>	<b>5'056'700</b>	<b>100.0</b>

An interesting conclusion can be made from this table: The small amount of raw material imports by Switzerland is in reverse proportion to the high reputation of its chocolate. Could there be any better proof of its quality?

<b>Relationship between domestic sales and exports of Swiss chocolate products</b>				
Source: Chocolate manufacturers				
	2020	2021	2022	
	t	t	t	%
Domestic sales	54,295	57,891	55,567	27
Exports *	125,679	139,209	150,780	73
<b>Total</b>	<b>179,974</b>	<b>197,100</b>	<b>206,347</b>	<b>100</b>

\* The foreign trade statistics compiled by the Swiss Federal Customs Administration are based on criteria different to the statistics behind those for the sector prepared by the Swiss manufacturers. The two sets of statistics therefore show different export figures.

## Structure of the world cocoa trade

The three most important cocoa-producing countries, the Ivory Coast, Ghana and Ecuador, are responsible for around 66 % of the global harvest. The Swiss chocolate industry imported 74 % of its cocoa bean requirements from Ghana (50 %) and Ecuador (24 %). It was responsible for processing around 2.0 % of the worldwide consumption of cocoa beans. In quantitative terms, Switzerland is therefore a minor player. All the more remarkable, therefore, is the excellent reputation enjoyed throughout the world by the Swiss chocolate industry. This reputation rests on product quality, innovative strength and the Swiss chocolate tradition that is lovingly nurtured by the manufacturing firms day by day.

The cocoa market is one of the world's most unstable raw material markets. This is why UNCTAD, the United Nations Conference for Trade and Development, has been trying over the years to coordinate supply and demand, and thereby bring some stability to the market in general and prices in particular. The new International Cocoa Agreement, which was agreed in June 2010 for this very purpose, entered into force on 1 October 2012.

<b>Cocoa harvest 2021/2022</b>		
Source: International Cocoa Organization (Bulletin No. 1, March 2023)		
	tons	%
Ivory Coast	2,120,600	44.0
Ghana	688,600	14.3
Ecuador	365,000	7.6
Cameroon	295,200	6.1
Nigeria	280,000	5.8
Brazil	220,000	4.6
Indonesia	180,000	3.7
Peru	160,000	3.3
Others	509,000	10.6
<b>World harvest</b>	<b>4,817,600</b>	<b>100.0</b>
In comparison:		tons
World harvest 2018/19	4,793,600	tons
World harvest 2019/20	4,741,000	tons
World harvest 2020/21	5,241,900	tons

## CHOCOSUISSE Members

<b>Chocolat ALPROSE SA</b> Via Rompada 36, Casella postale 165, 6987 Caslano	Tel. Fax	+41 (0)91 611 88 88 +41 (0)91 606 51 85
<b>BARRY CALLEBAUT SCHWEIZ AG</b> Hardturnstrasse 181, 8005 Zürich	Tel. Fax	+41 (0)43 204 04 04 +41 (0)43 204 04 09
<b>Chocolat BERNRAIN AG</b> Bündtstrasse 12, Postfach, 8280 Kreuzlingen	Tel. Fax	+41 (0)71 677 93 77 +41 (0)71 677 93 50
<b>Chocolats Camille BLOCH SA</b> 2608 Courtelary	Tel. Fax	+41 (0)32 945 12 00 +41 (0)32 945 12 01
<b>DELICA AG</b> Bresteneggstrasse 4, 5033 Buchs	Tel. Fax	+41 (0)62 836 26 26 +41 (0)62 836 25 01
<b>Chocolats et Cacaos FAVARGER SA</b> Ch. de la Chocolaterie 2, Case postale 148, 1290 Versoix	Tel. Fax	+41 (0)22 775 11 00 +41 (0)22 775 11 01
<b>Max FELCHLIN AG</b> Gotthardstrasse 11, 6438 Ibach	Tel. Fax	+41 (0)41 819 65 00 +41 (0)41 819 65 70
<b>HALBA</b> Division der Coop, Salinenstrasse 70, 4133 Pratteln	Tel. Fax	+41 (0)61 825 91 00 -
<b>LÄDERACH (SCHWEIZ) AG</b> Bleiche 14, 8755 Ennenda	Tel. Fax	+41 (0)55 645 44 44 +41 (0)55 645 44 45
<b>LINDT &amp; SPRÜNGLI (SCHWEIZ) AG</b> Seestrasse 204, 8802 Kilchberg	Tel. Fax	+41 (0)44 716 22 33 +41 (0)44 715 39 85
<b>MAESTRANI Schweizer Schokoladen AG</b> Toggenburgerstrasse 41, Postfach, 9230 Flawil	Tel. Fax	+41 (0)71 228 38 11 +41 (0)71 228 38 00
<b>MARS SCHWEIZ AG</b> Baaremattstrasse 6, 6340 Baar	Tel. Fax	+41 (0)41 769 14 14 +41 (0)41 769 15 15
<b>MONDELEZ SCHWEIZ GMBH</b> Lindbergh-Allee 1, 8152 Glattpark	Tel. Fax	+41 (0)58 440 40 40 +41 (0)58 440 40 01
<b>NESTLÉ SUISSE SA</b> Case postale 352, 1800 Vevey	Tel. Fax	+41 (0)21 924 51 11 +41 (0)21 924 55 79
<b>Confiserie SPRÜNGLI AG</b> Bahnhofstrasse 21, 8001 Zürich	Tel. Fax	+41 (0)44 224 46 46 +41 (0)44 224 47 35
<b>STORCK (Schweiz) GmbH</b> Josefstrasse 84, 8005 Zürich	Tel. Fax	+41 (0)44 276 45 45 +41 (0)44 276 45 46
<b>Chocolat STELLA SA</b> Via alle Gerre 28, 6512 Giubiasco	Tel. Fax	+41 (0)91 857 01 41 +41 (0)91 857 38 86
<b>VILLARS Maître Chocolatier SA</b> Rte de la Fonderie 18, Case postale 1568, 1701 Fribourg	Tel. Fax	+41 (0)26 426 65 00 +41 (0)26 426 65 56