

An aerial night view of a city, likely Shanghai, with a glowing network of white lines overlaid on the scene. The lines connect various points across the city, symbolizing innovation and connectivity. The background shows a dense urban landscape with illuminated buildings and a river.

Traditional Products – Innovation Landscape Bread & Bread Products

Methodology

ANALYSIS & PARAMETERS

- Analysis is performed based on new product launches tracked on the Innova Database.
- Geography: Europe.
- Time Frame: 2014 – 2018.
- Category: Bakery
 - Subcategories: Bread & Bread Products
- Positioning: free text search for products with “Protected designation of origin”, “Protected geographical indication”, “Traditional specialties guaranteed”, “Product of Canary Islands”, “Mountain Product” and “Product of Island Farming”.

ABBREVIATIONS AND NOTES

- CAGR = Compound Annual Growth Rate
- F&B = Food & Beverage
- NPL = New Product Launches
- PDO = Protected designation of origin
- PGI = Protected geographical indication
- TSG = Traditional specialties guaranteed
- Number of respondents of Consumer Survey: **500 per analyzed country.**
- Shelf-stable = ambient shelving
- Traditional/origin seal = products with PGI, PDO, TSG, Mountain Product, Product of Canary Islands and Product of Island Farming seal.
- Traditional positioning = products with “traditional” positioning at Innova Database.

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Overview of Trends in Bread & Bread Products - Europe



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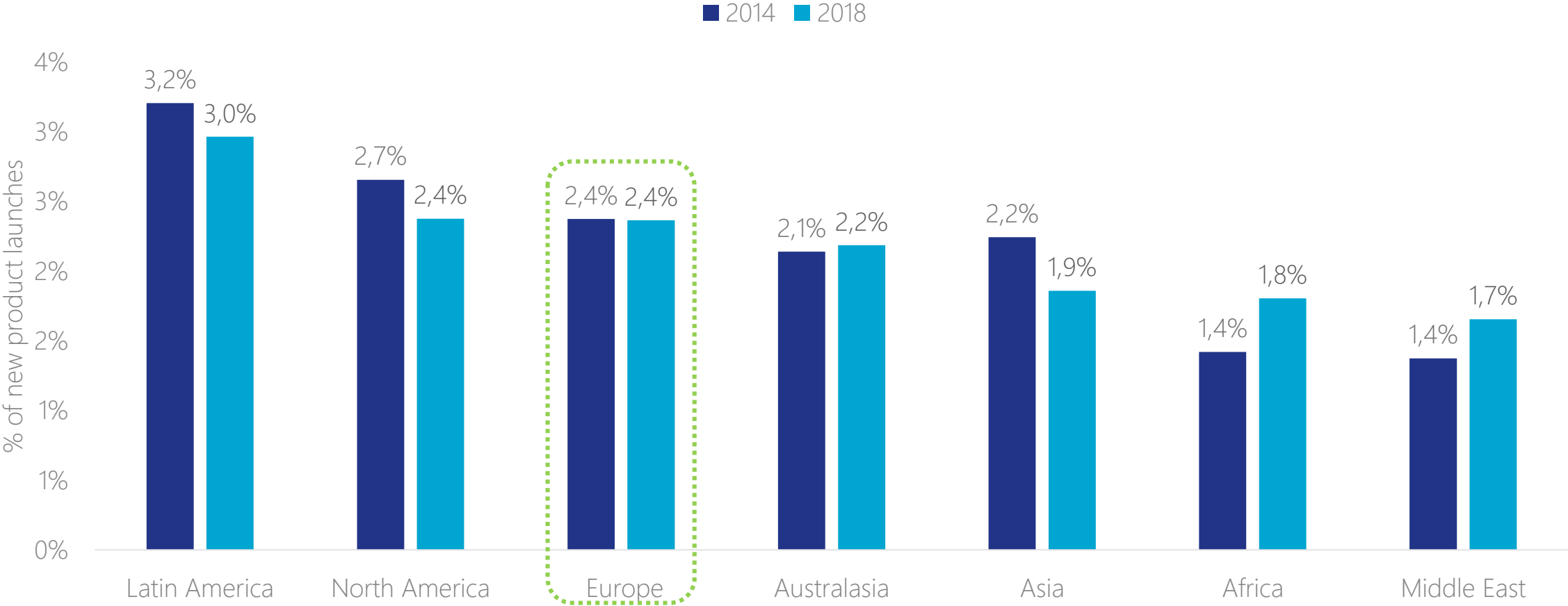


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Bread & bread products presence is stable in Europe

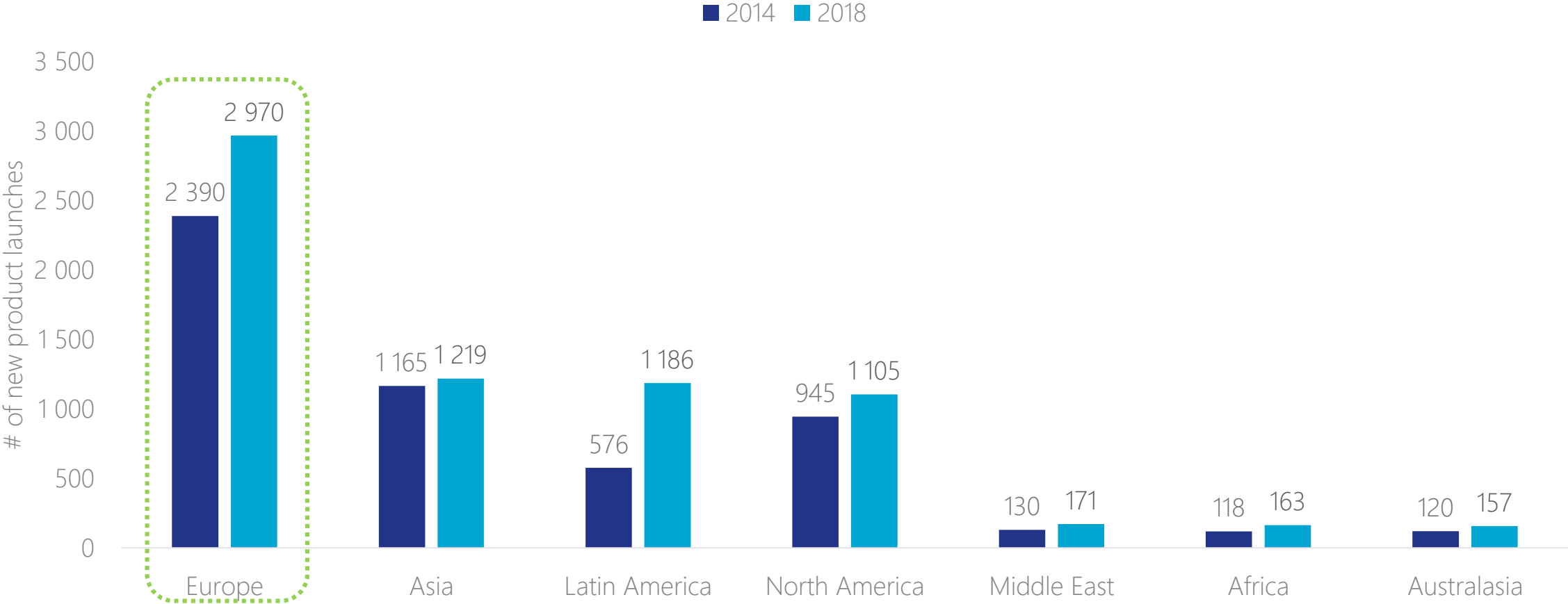
- Bread & bread products presence is stable in Europe with 2,4% of all F&B product launches tracked, while in Latin America the presence is decreasing, but still on top of all regions.

Bread & bread products as percentage (%) of F&B new product launches tracked per region (2018 vs. 2014)



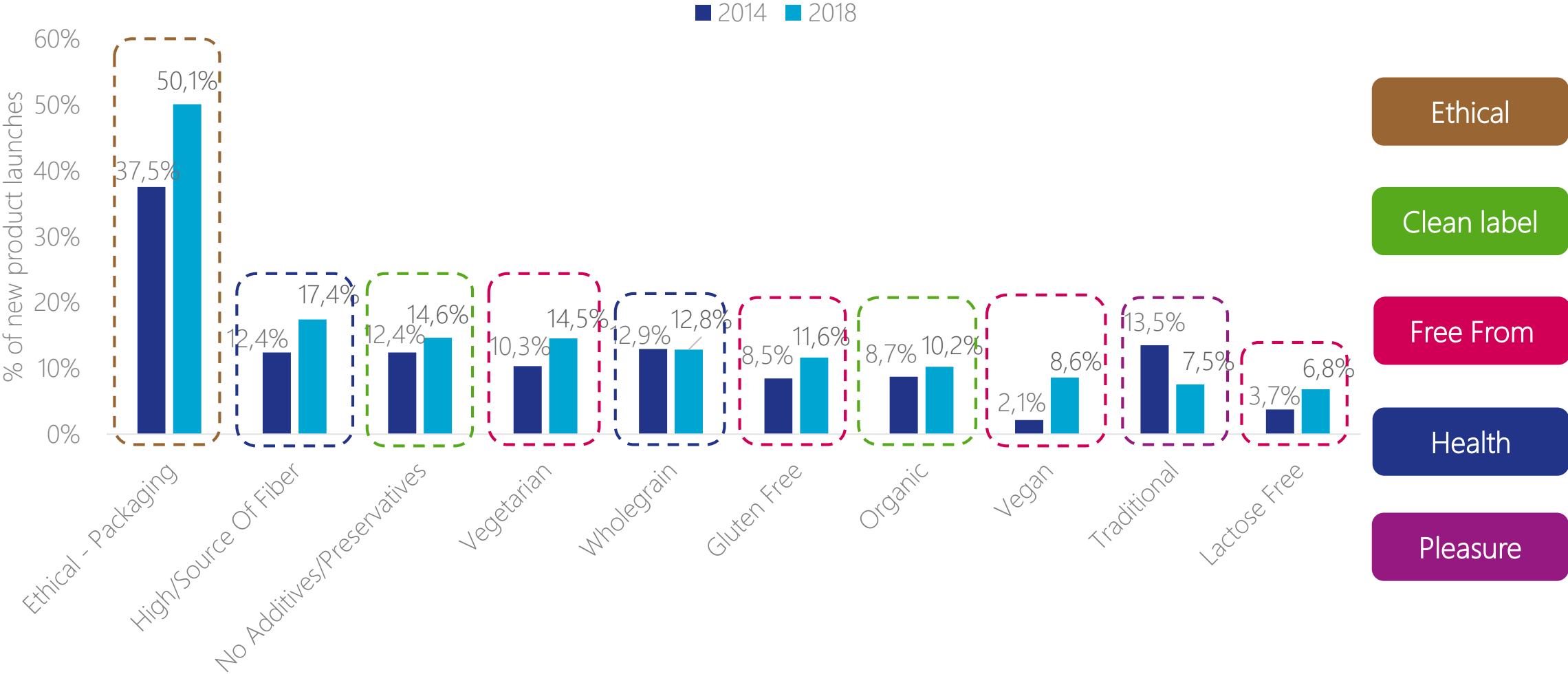
Europe leads bread & bread products new product launches

Number of bread & bread products new product launches tracked per region (2018 vs. 2014)



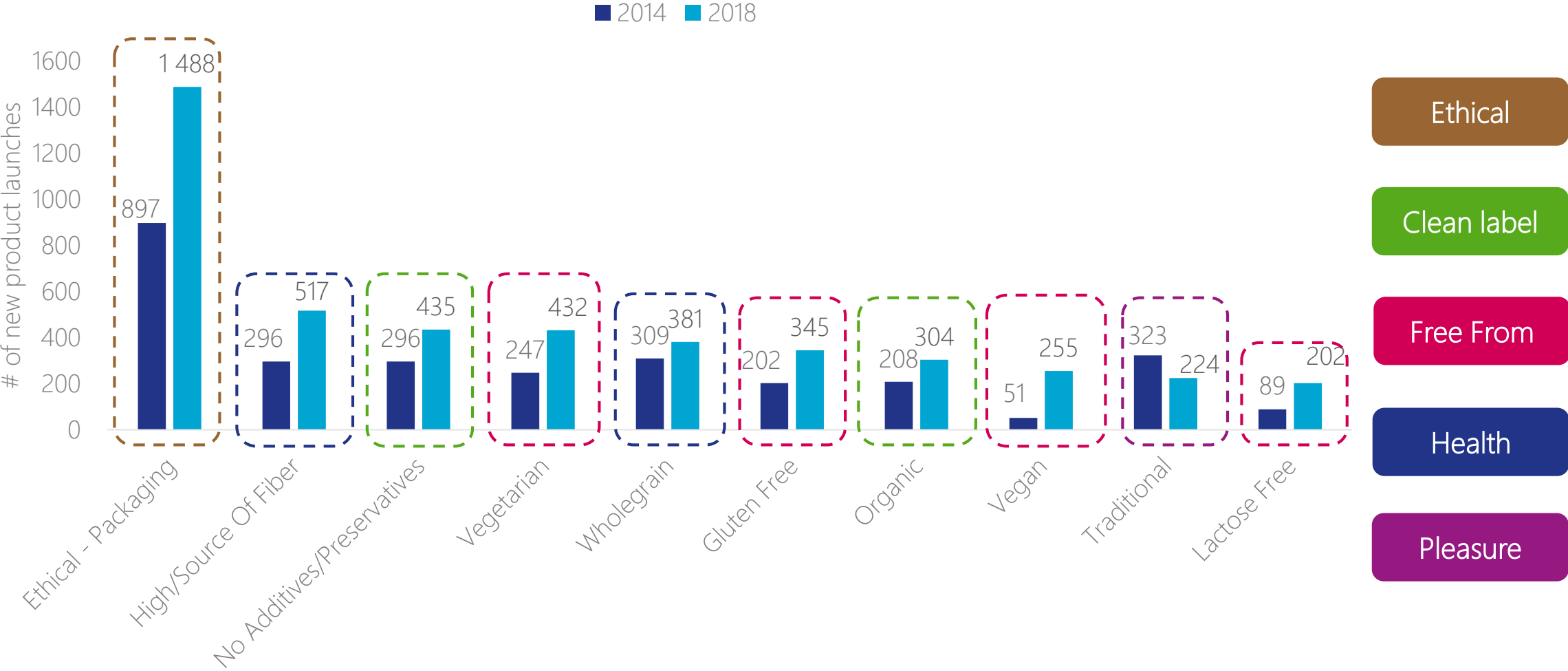
Ethics, health and free from lead in bread & bread products positionings

Top positionings as percentage (%) of bread & bread products new product launches tracked (Europe, 2018 vs. 2014)



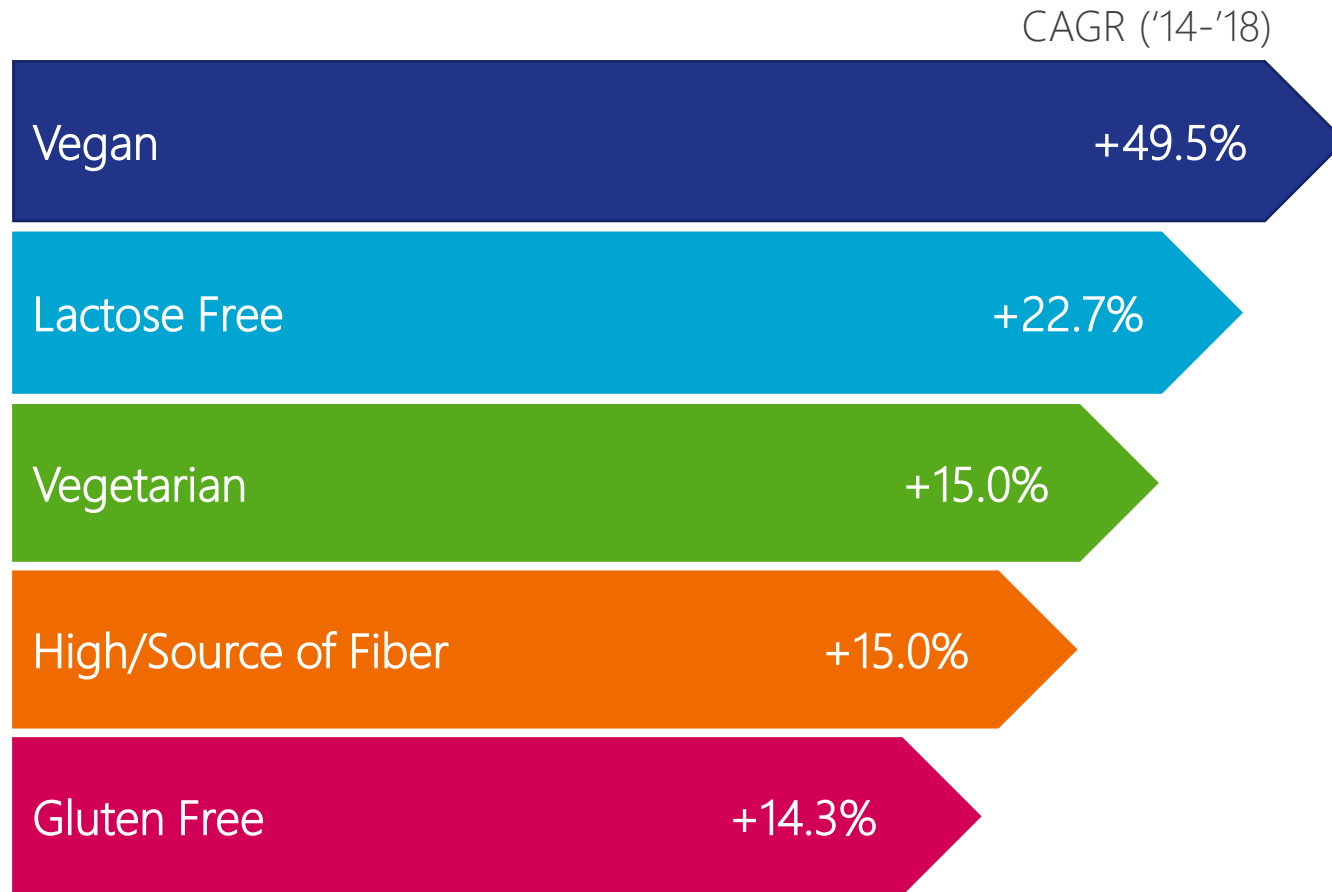
Ethics, health and free from lead in bread & bread products positionings

Number of bread & bread products new product launches tracked per positioning (Europe, 2018 vs. 2014)



Free from claims are fastest growing in European bread & bread products

Fastest growing top positionings as an average annual growth rate (%) in new bread & bread products product launches tracked (Europe, CAGR 2014-2018)

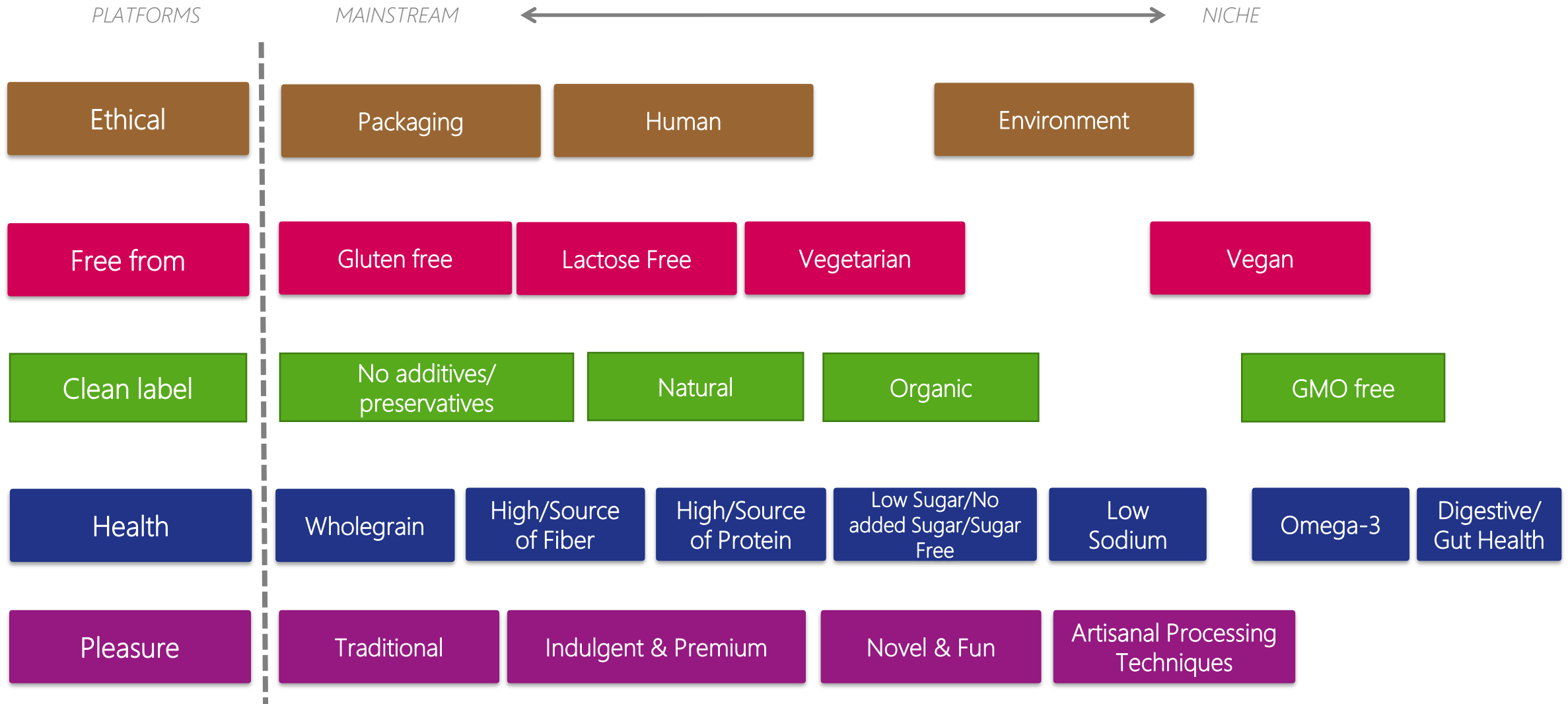


Veggie Korn Sliced Vegan Bread

Hungary, Jan 2019

CLAIMS **Suitable for vegans. Rich in fiber. Lactose free.** Prepared without yeast.

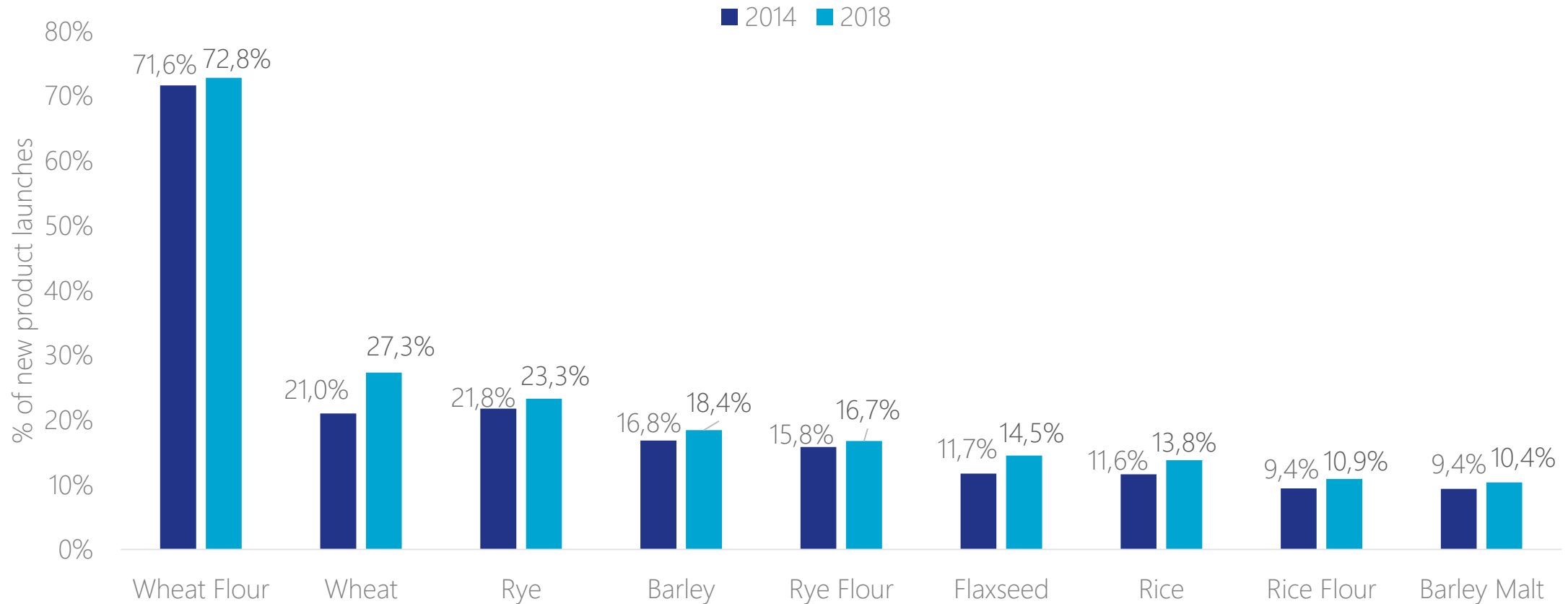
Key innovation platforms in bread & bread products



Wheat is the top grain used in bread & bread products in Europe

- Traditional grains such as wheat and rye have an increasing presence in bread & bread products in Europe, however, specially due to the gluten free wave, flaxseed and rice-based products is expected to show continuous growth in the coming years.

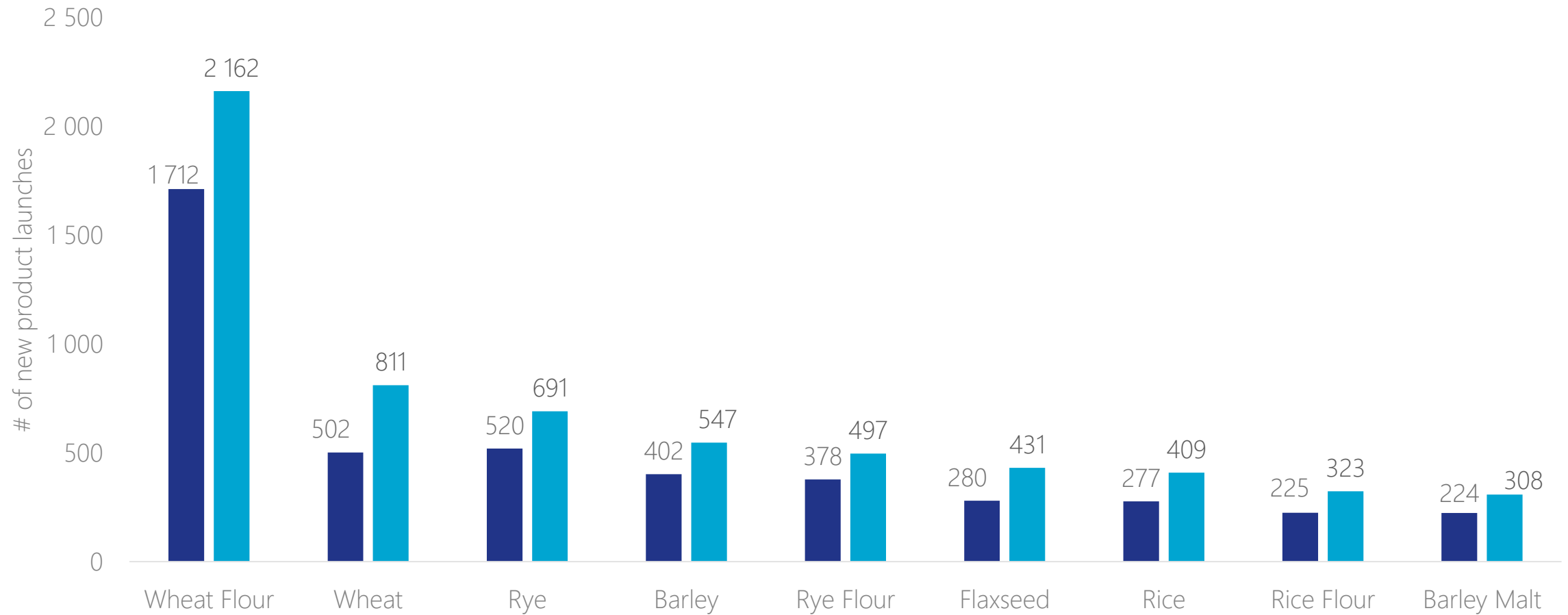
Top grains as percentage (%) of bread & bread products new product launches tracked (Europe, 2018 vs. 2014)



Wheat is the top grain used in bread & bread products in Europe

Number of bread & bread products new product launches tracked per grain (Europe, 2018 vs. 2014)

■ 2014 ■ 2018



European Consumer Insights in Bread & Bread Products



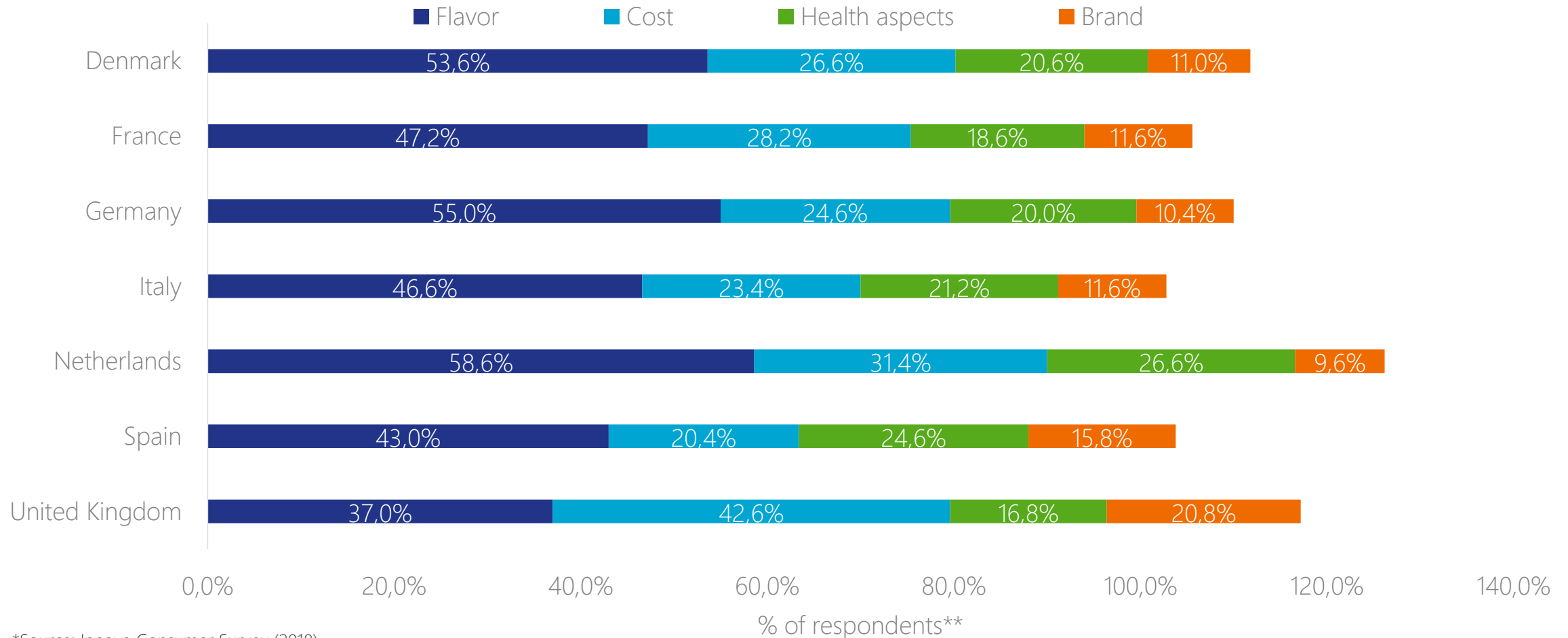
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Flavor is the main factor consumers pay importance when buying bread

What factors do you pay importance to when buying bread & bread products?* (Europe, 2018)



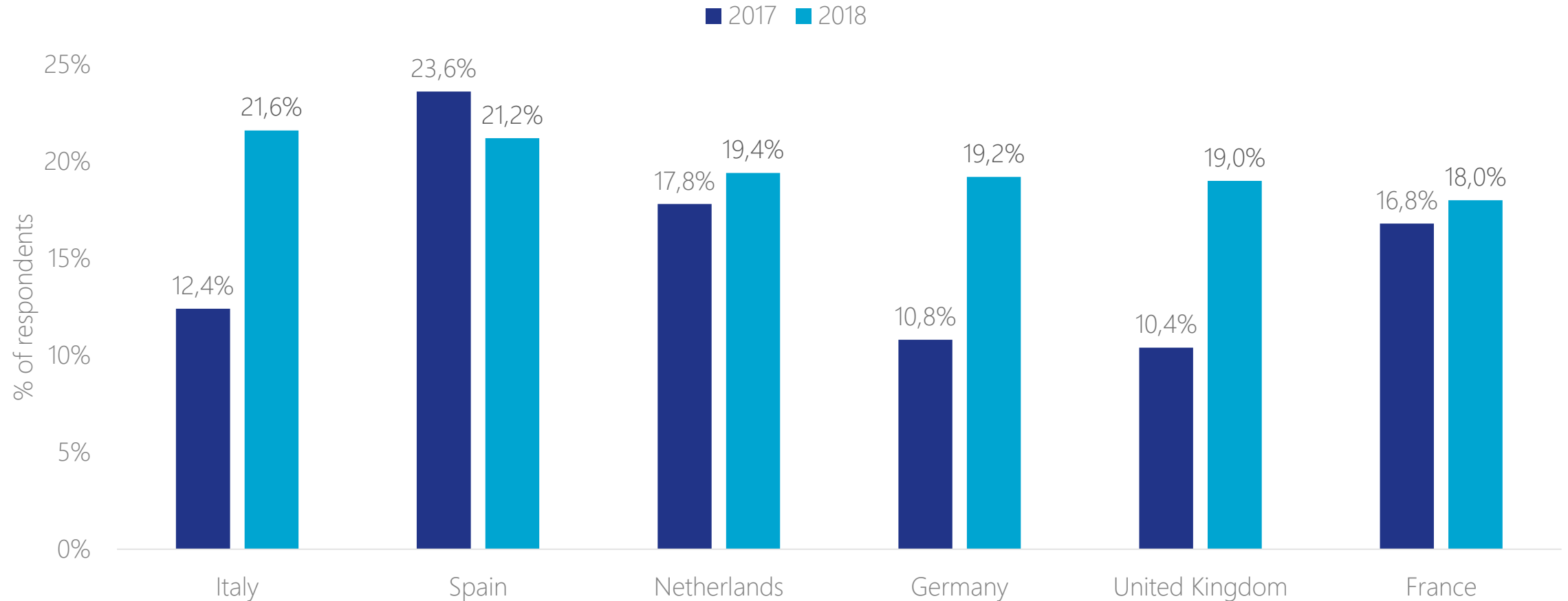
*Source: Innova Consumer Survey (2018)

**Results may be greater than 100% due to multiple answers by consumers.

Bread & bread products consumption increased most in Italy

- Although Italy leads growth consumption, all the analyzed countries, except Spain, had positive results in the period.

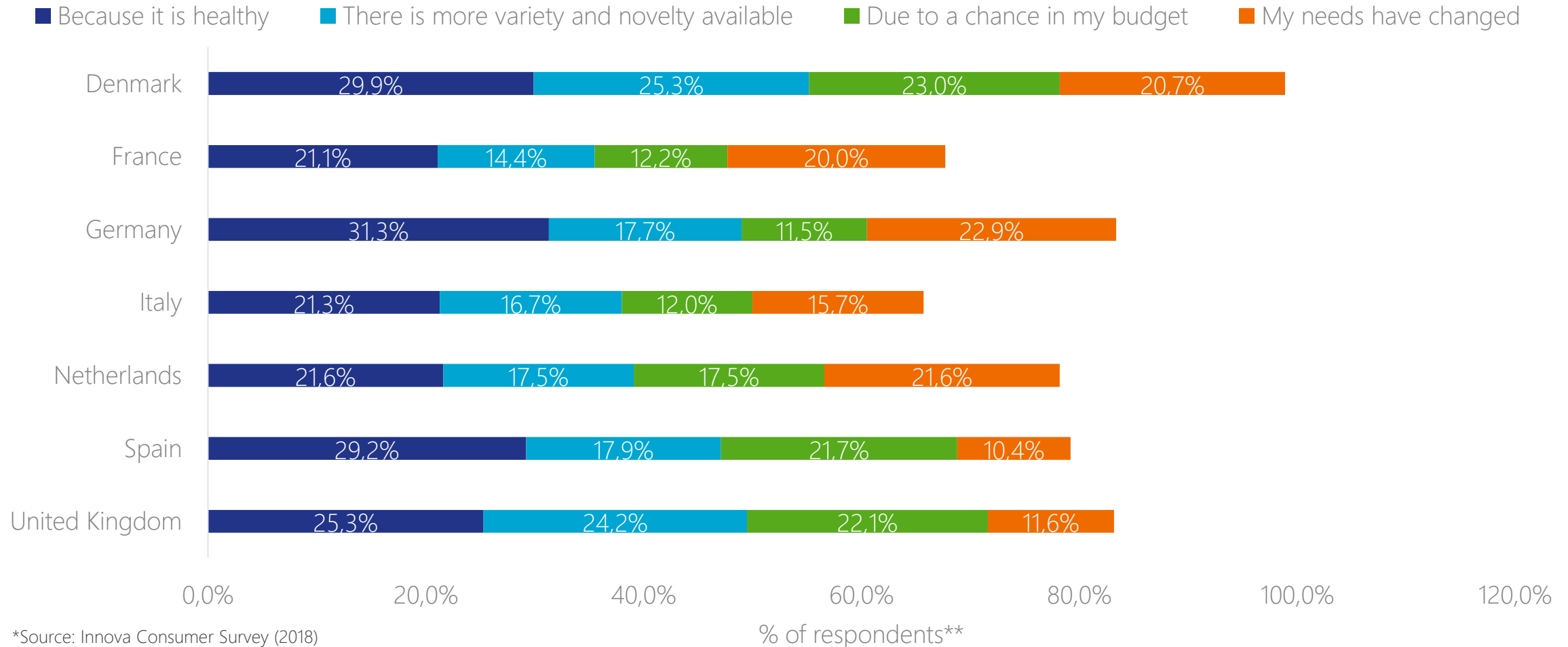
Have you increased your consumption of bread & bread products over the last year? Answer: Yes * (Europe, 2018 vs. 2017)



*Source: Innova Consumer Survey (2018) and Innova Consumer Survey (2017)

Health concern is the main drivers for bread & bread products consumption

Why have you increased your consumption of bread & bread products?* (Europe, 2018)

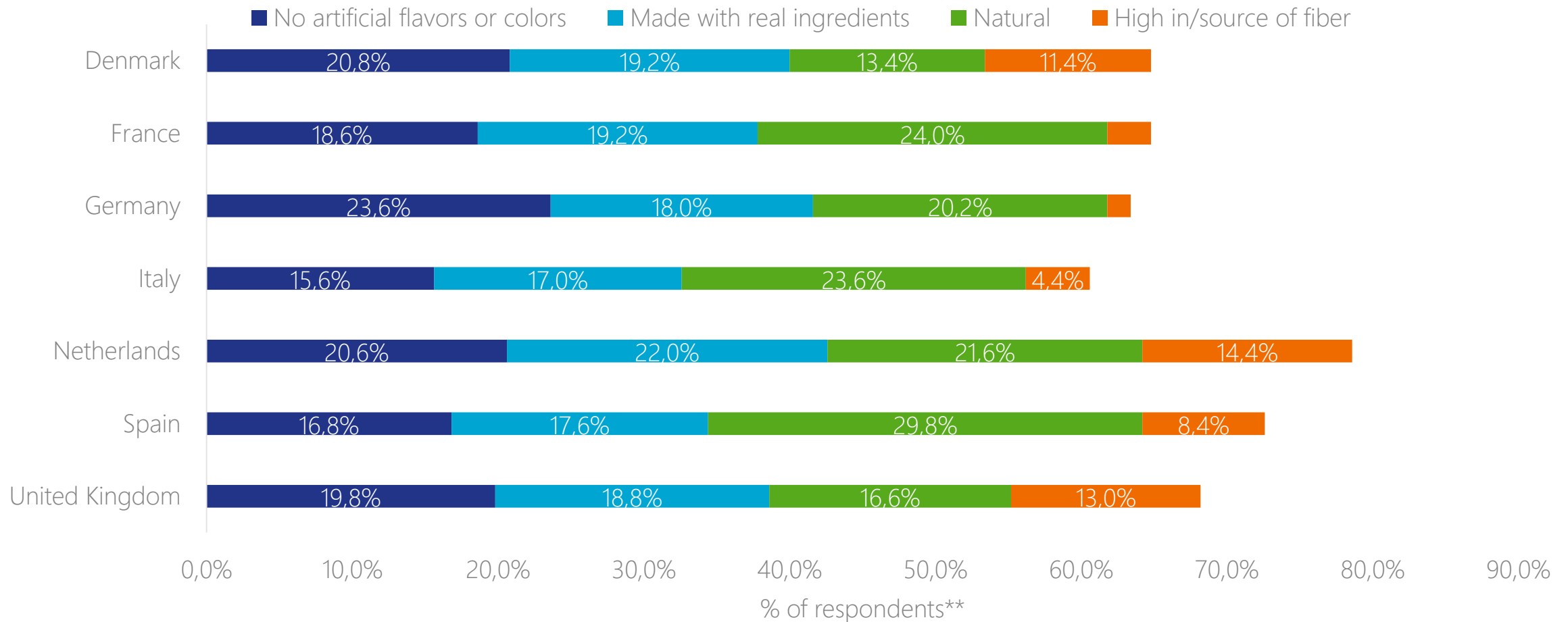


*Source: Innova Consumer Survey (2018)

**Results may be greater than 100% due to multiple answers by consumers.

No artificial flavors and natural are the main factors in bread purchasing

Choose up to three factors that most influence your purchasing decision when purchasing bread & bread products*
(Europe, 2018)



*Source: Innova Consumer Survey (2018)

**Results may be greater than 100% due to multiple answers by consumers.

Physical stores lead bread & bread products purchase, specially mass retailers

Where do you typically purchase bread & bread products?* (Europe, 2018)



*Source: Innova Consumer Survey (2018)

**Results may be greater than 100% due to multiple answers by consumers.

Overview of Trends in Traditional Bread & Bread Products - Europe



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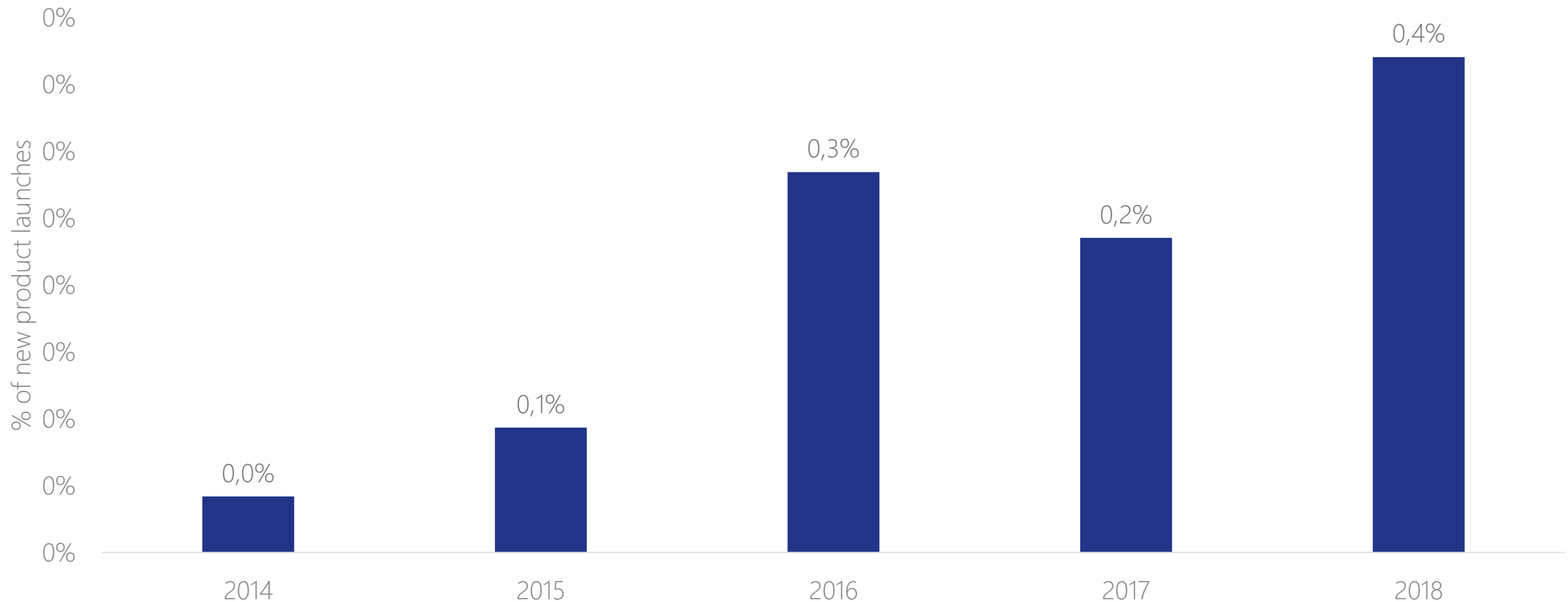


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Origin seal increasing presence in bread & bread products

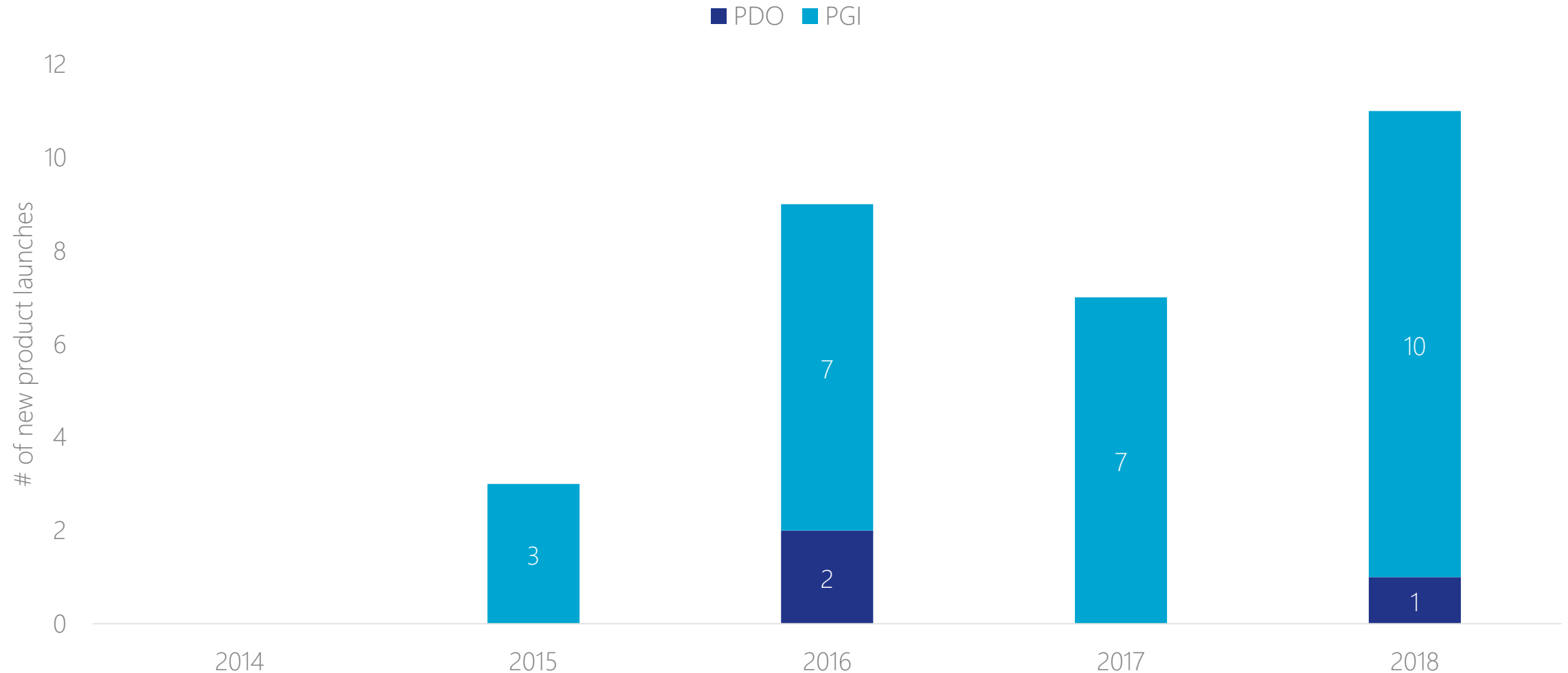
- With small penetration in the subcategory, traditional/origin seal reached a peak in 2018 in Europe.

Share of bread & bread products with traditional/origin seal as percentage (%) of new bread & bread products product launches tracked (Europe, 2014-2018)



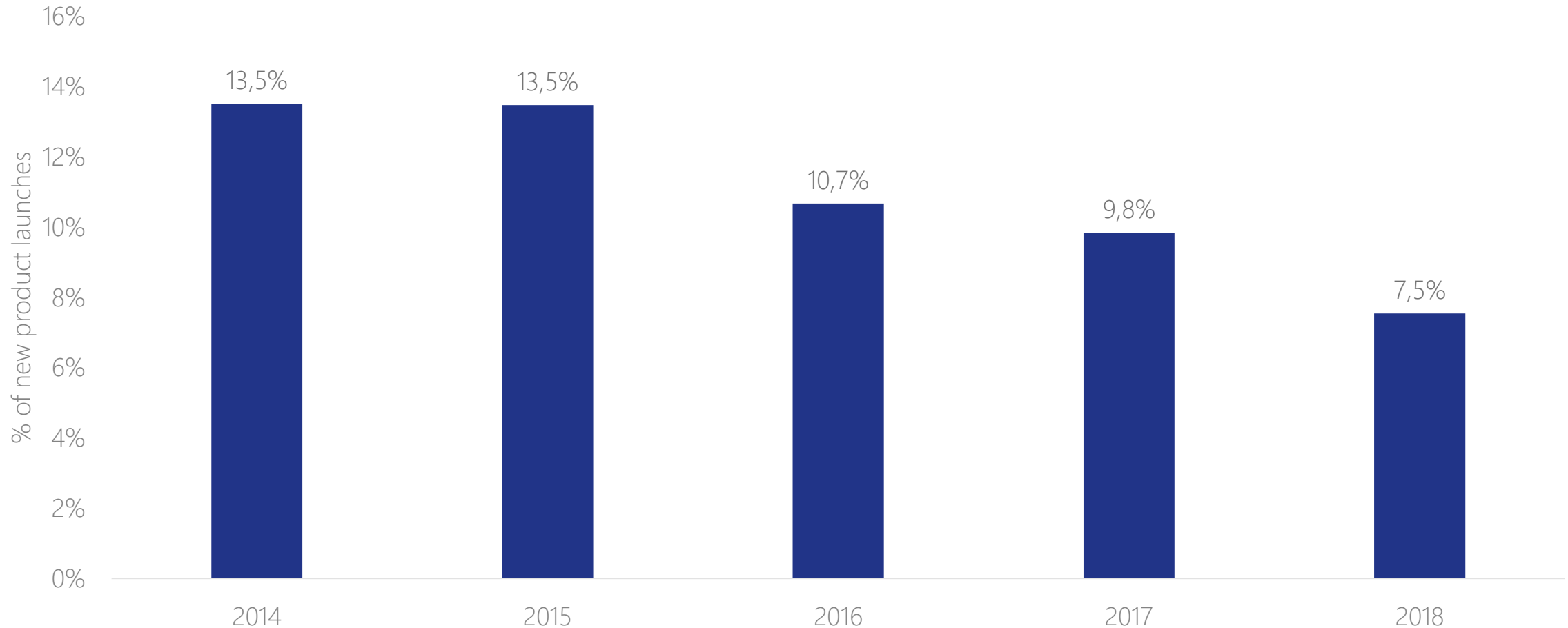
2018 is the year with highest NPD with origin seals in bread & bread products

Number of new bread & bread products launches tracked with traditional/origin seal (Europe, 2014-2018)



Traditional positioning is decreasing in bread & bread products

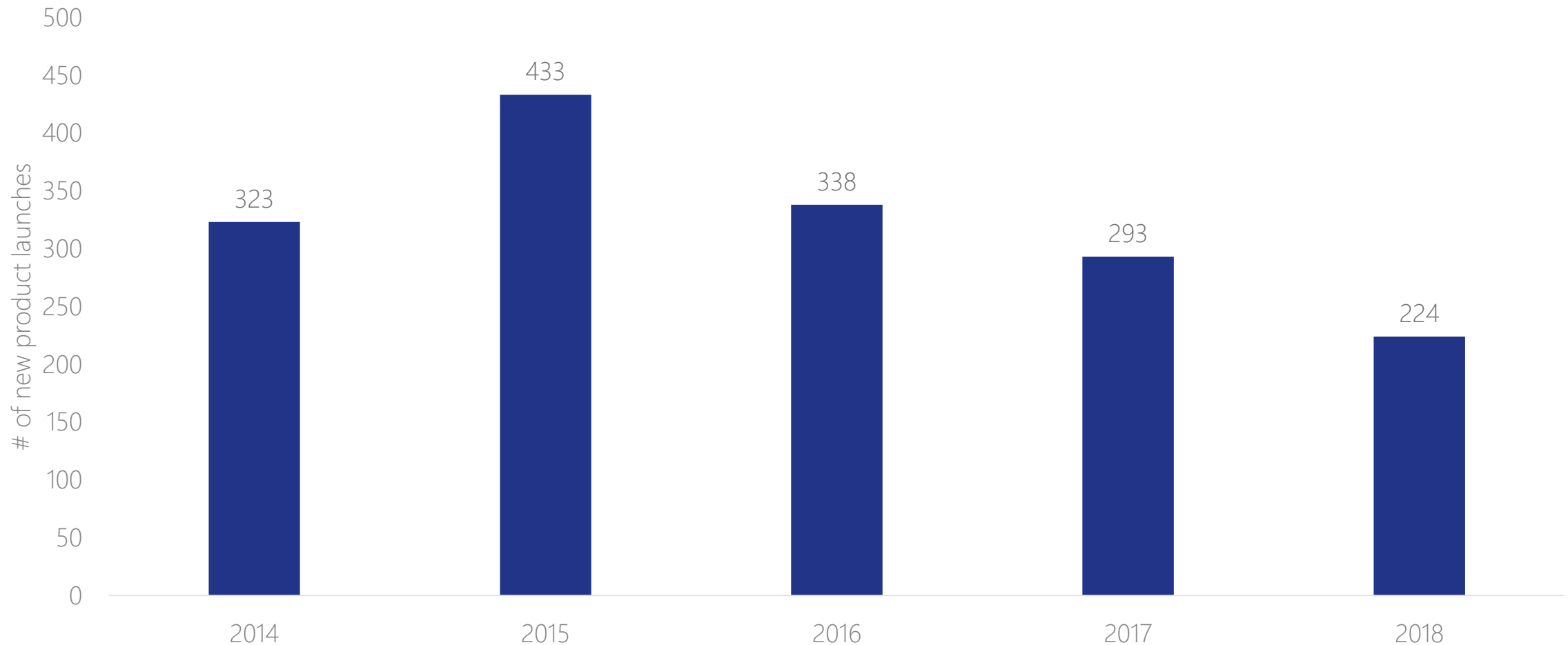
Share of traditional positioning as percentage (%) of new bread & bread products product launches tracked (Europe, 2014-2018)



Traditional positioning is decreasing in bread & bread products

- Contrary to the movement of origin traditional/seal, traditional positioning without seal is decreasing in bread & bread products.

Number of new bread & bread products with traditional positioning launches tracked (Europe, 2014-2018)



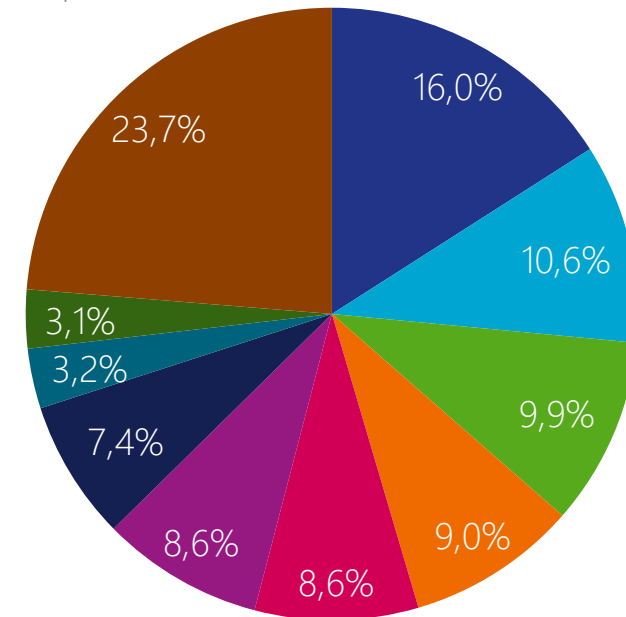
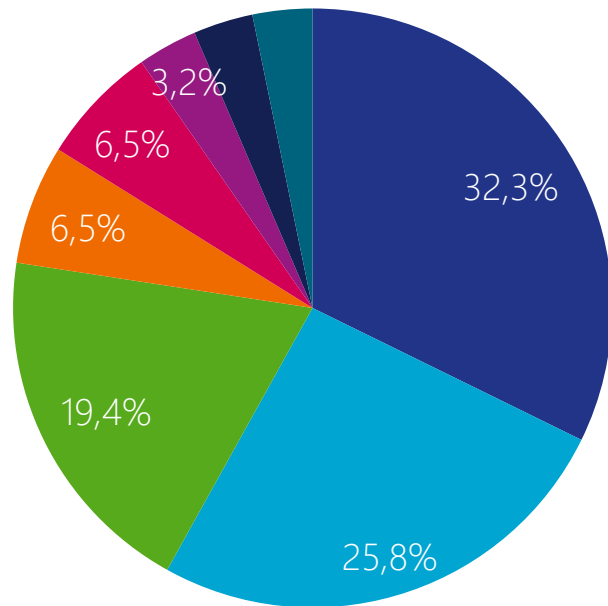
Italy leads new launches with origin seal and UK leads traditional claims

- Spain leads product launches activity in products with traditional/origin seal, but United Kingdom launches more products with traditional positioning regardless the seal.

Top countries as percentage (%) of new bread & bread products product launches tracked with traditional/origin seal (Europe, 2014-2018)



Top countries as percentage (%) of new bread & bread products product launches tracked with traditional positioning (Europe, 2014-2018)

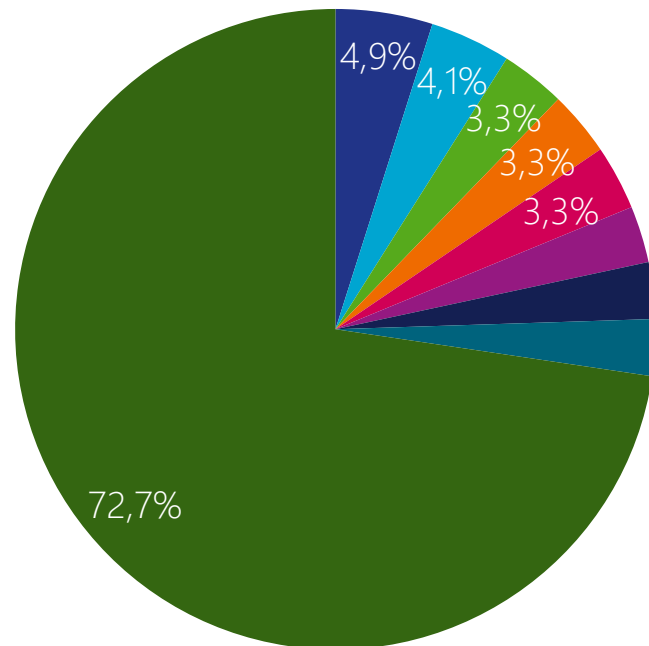


Comercial Masoliver is the top company with traditional positioning in 2018

- Albert Heijn, leading company in 2014, lost position to Comercial Masoliver in 2018 in European products with traditional positioning.

Top companies as percentage (%) of new bread & bread products product launches tracked with traditional positioning (Europe, 2014)

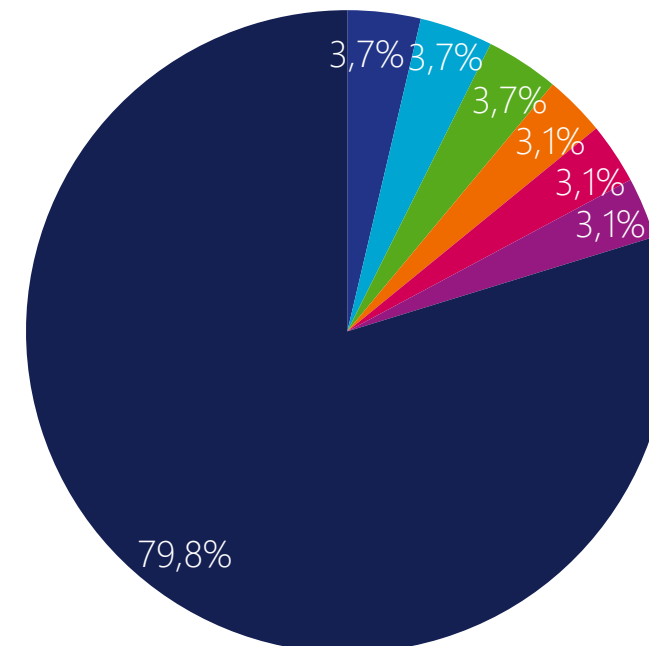
■ Albert Heijn	■ Coop	■ Chipita
■ Jumbo	■ Lidl	■ Dr Schar
■ Genesis Nutrition	■ Irish Pride	■ Other companies*



* Other companies = 84 companies

Top companies as percentage (%) of new bread & bread products product launches tracked with traditional positioning (Europe, 2018)

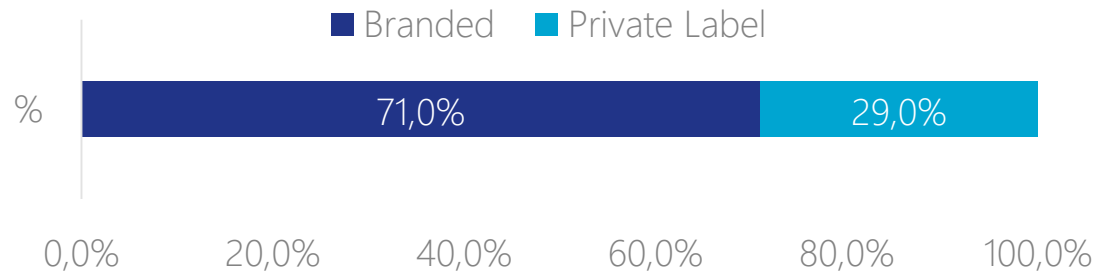
■ Comercial Masoliver	■ Elviart	■ Gradz Bakery
■ Albert Heijn	■ Europital	■ Tesco
■ Other companies**		



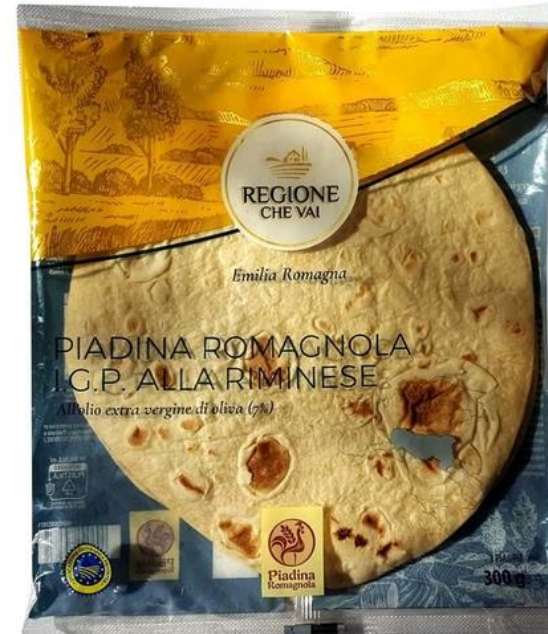
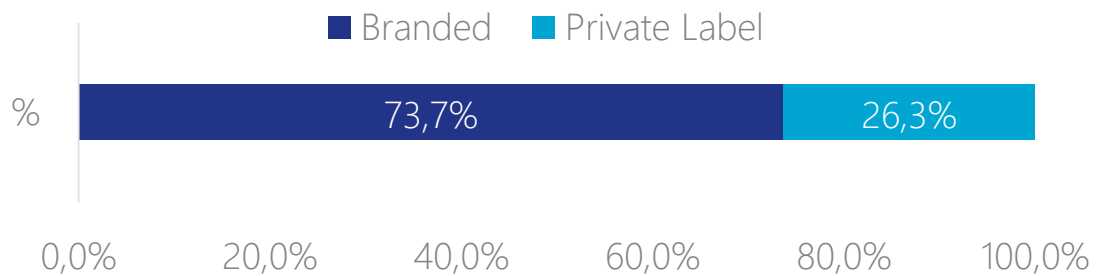
** Other companies = 75 companies

Branded products lead bread & bread products launches with origin seal

Share of branded and private label as percentage (%) of new bread & bread products product launches tracked with traditional/origin seal (Europe, 2014-2018)



Share of branded and private label as percentage (%) of new bread & bread products product launches tracked with traditional positioning (Europe, 2014-2018)



Regione Che Vai Piadina Romagnola: Romagna Piadina

Hungary, Mar 2019

CLAIMS Protected Geographical Indication logo. Recyclable packaging.



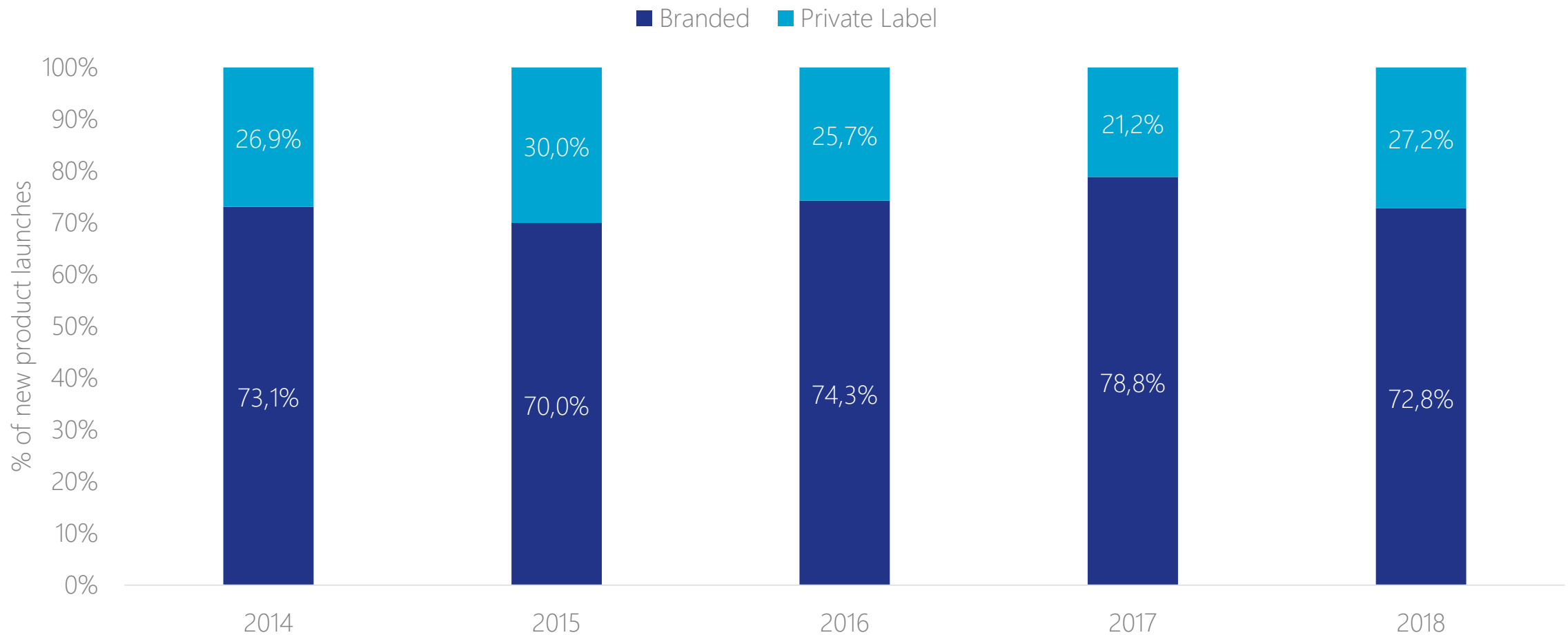
Primia Piadina Romagnola Igp Alla Riminese: Romagna Piadina Igp At Rimini

Italy, Nov 2018

CLAIMS Protected Geographical Indication logo.

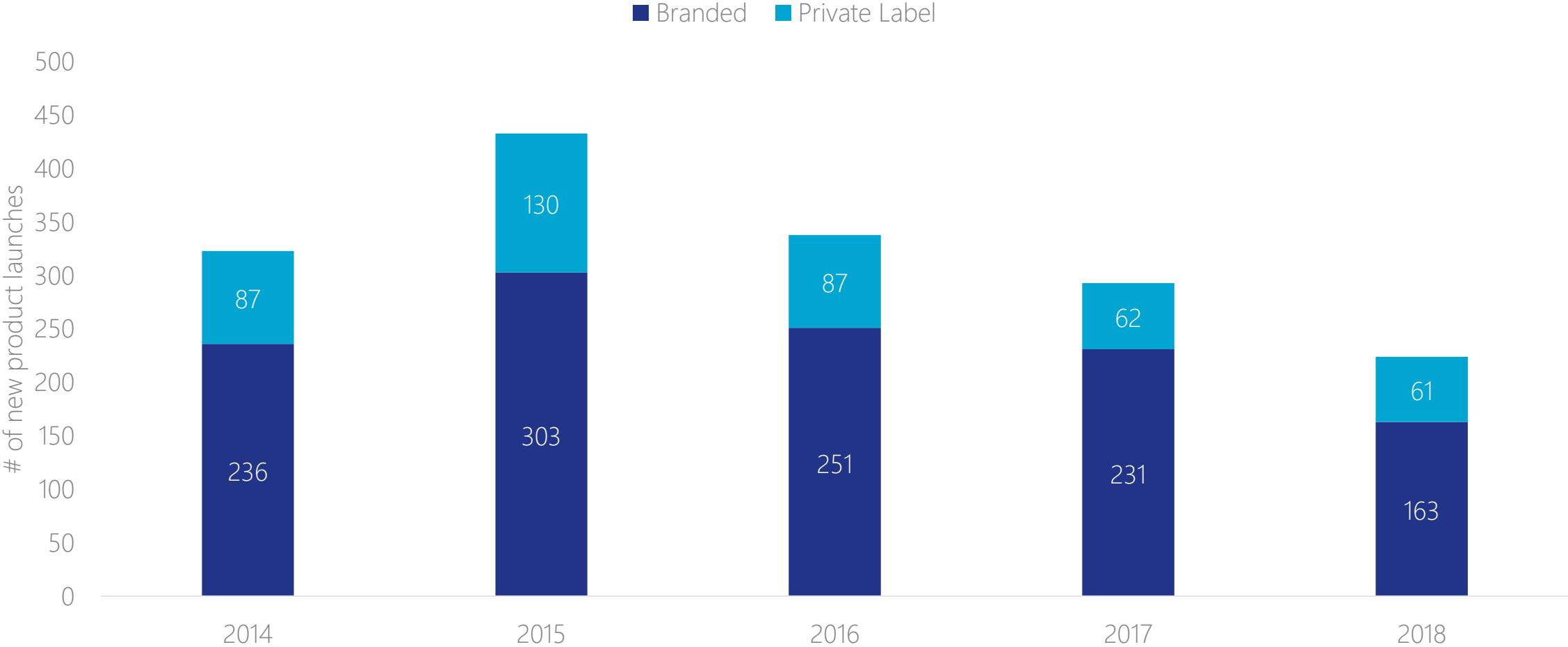
More branded products with traditional positioning and absence of seal

Share of branded and private label as percentage (%) of new bread & bread products product launches tracked with traditional positioning (Europe, 2014-2018)



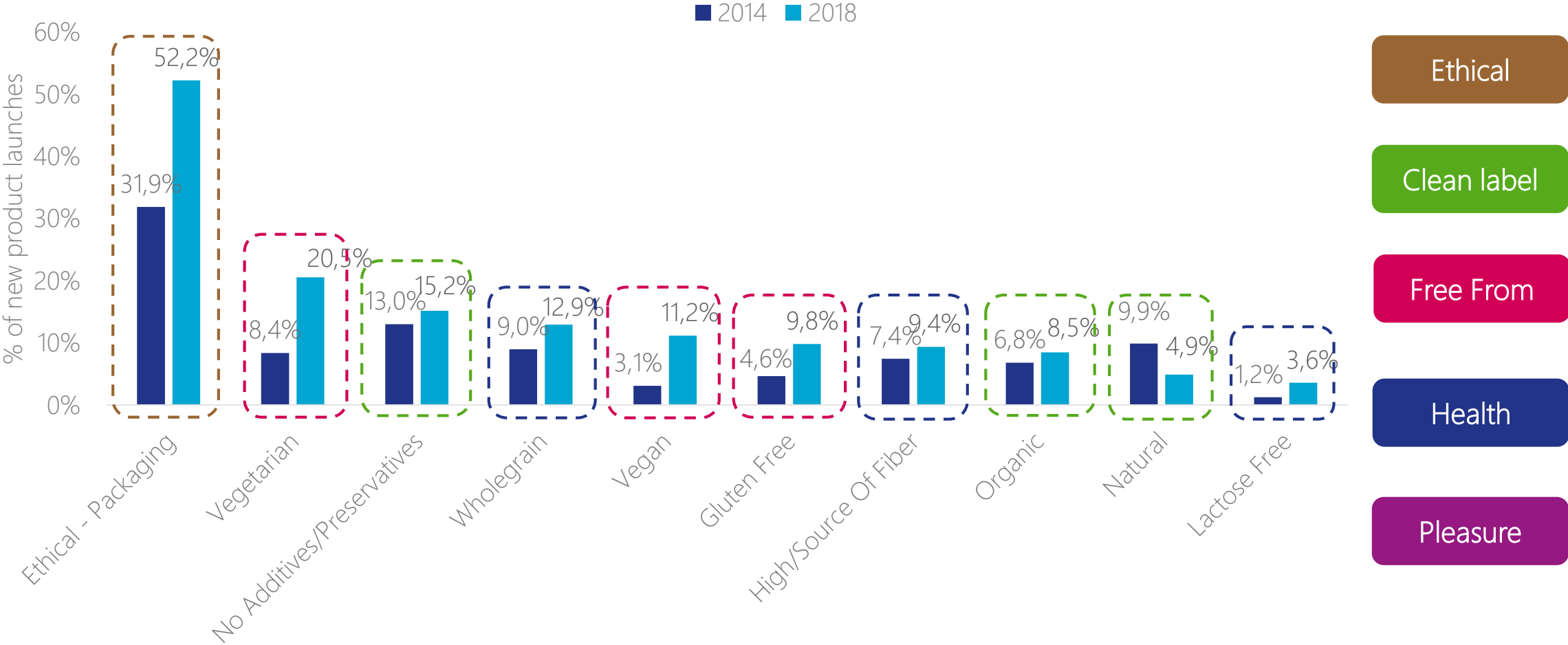
More branded products with traditional positioning and absence of seal

Number of new bread & bread products with traditional positioning branded and private label (Europe, 2014-2018)



Ethical claims on top of bread & bread products with traditional positioning

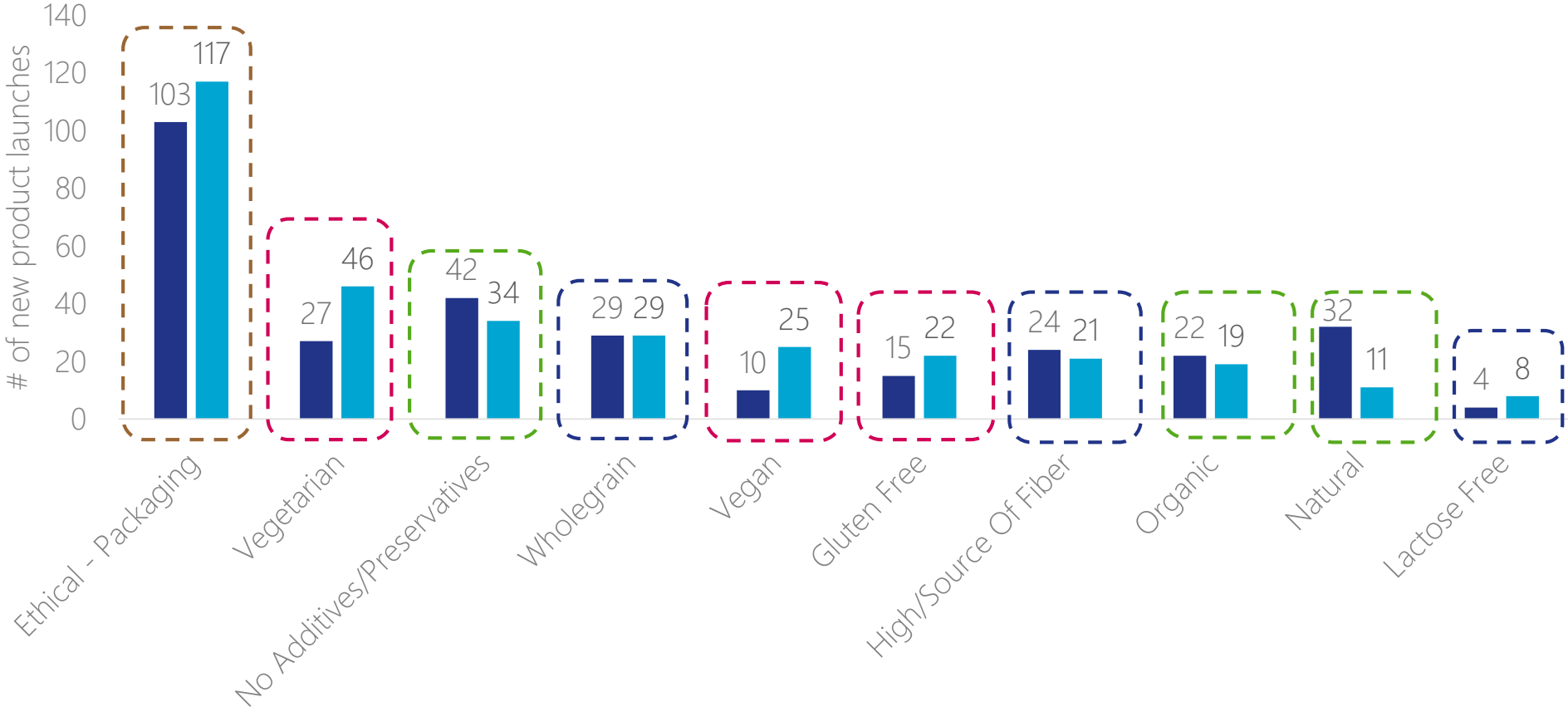
Top positionings as percentage (%) of bread & bread products new product launches tracked with traditional positioning (Europe, 2018 vs. 2014)



Ethical claims on top of bread & bread products with traditional positioning

Number of new bread & bread products with traditional positioning launches tracked per positioning (Europe, 2018 vs. 2014)

■ 2014 ■ 2018



Ethical

Clean label

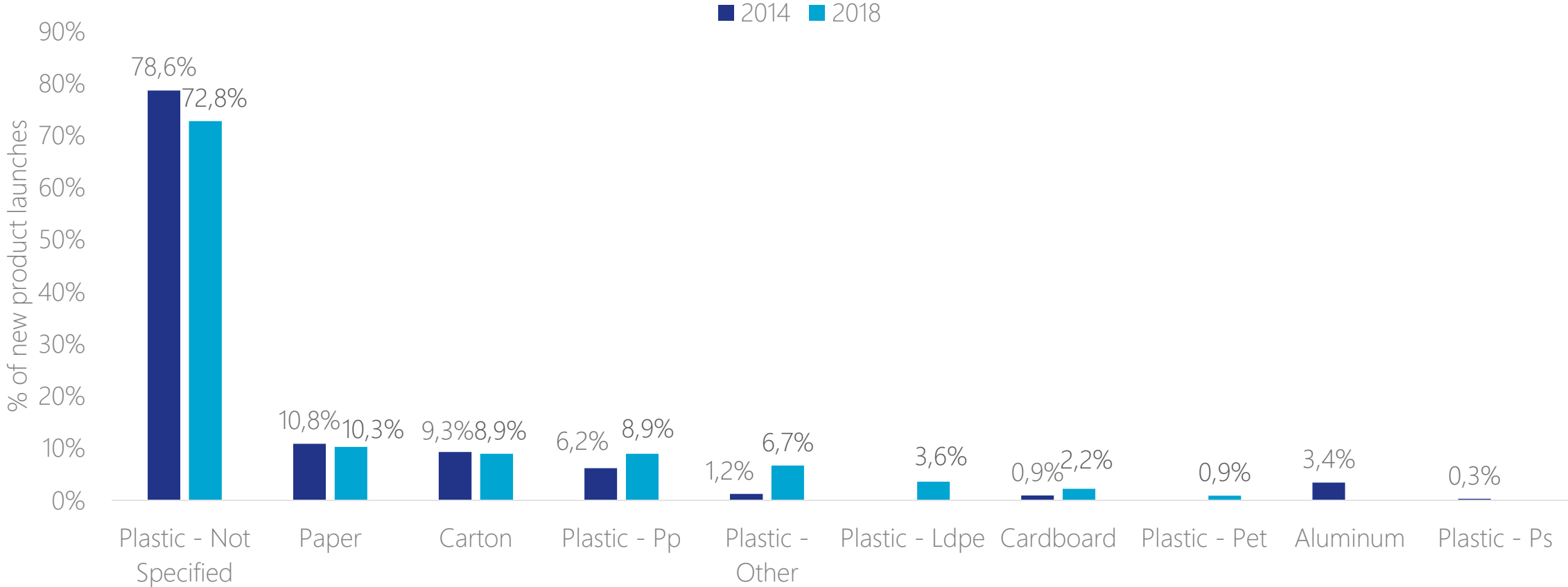
Free From

Health

Pleasure

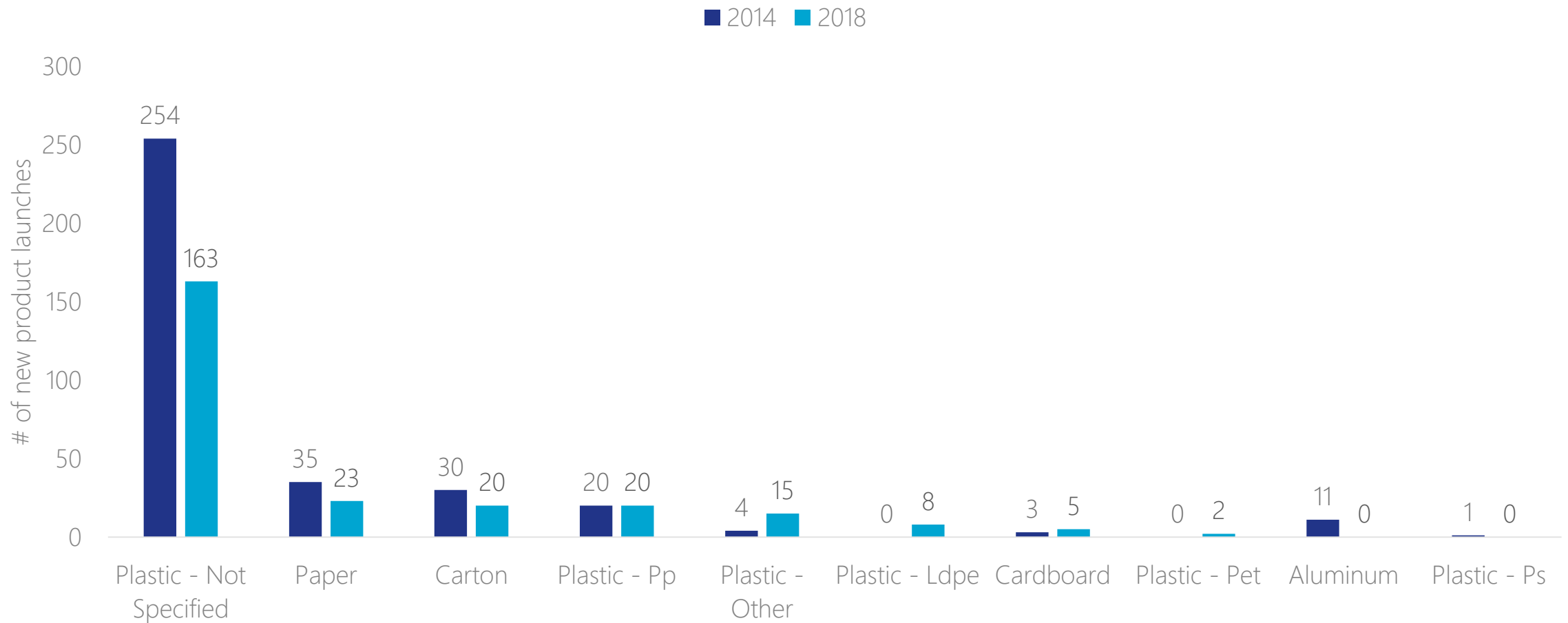
Plastic remains the main packaging material in bread & bread products

Packaging material as percentage (%) of bread & bread products new product launches tracked with traditional positioning (Europe 2014 vs. 2018)



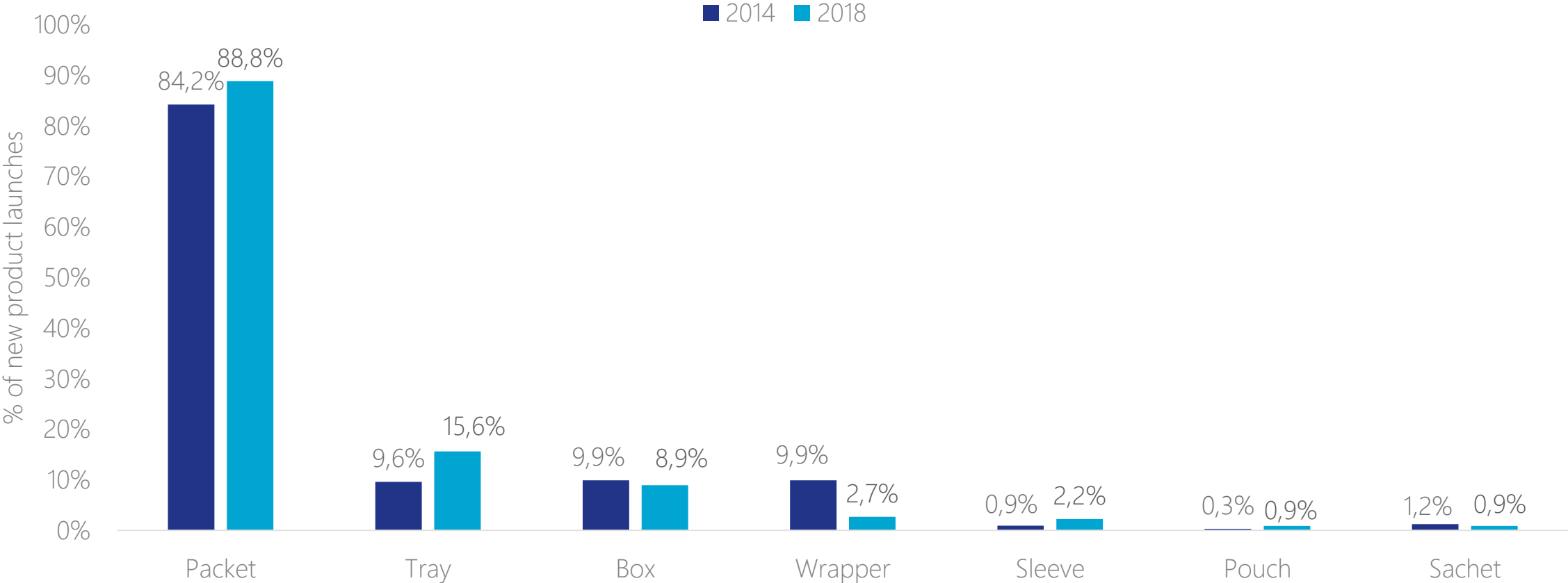
Plastic remains the main packaging material in bread & bread products

Number of new bread & bread products with traditional positioning launches tracked per packaging material (Europe 2014 vs. 2018)



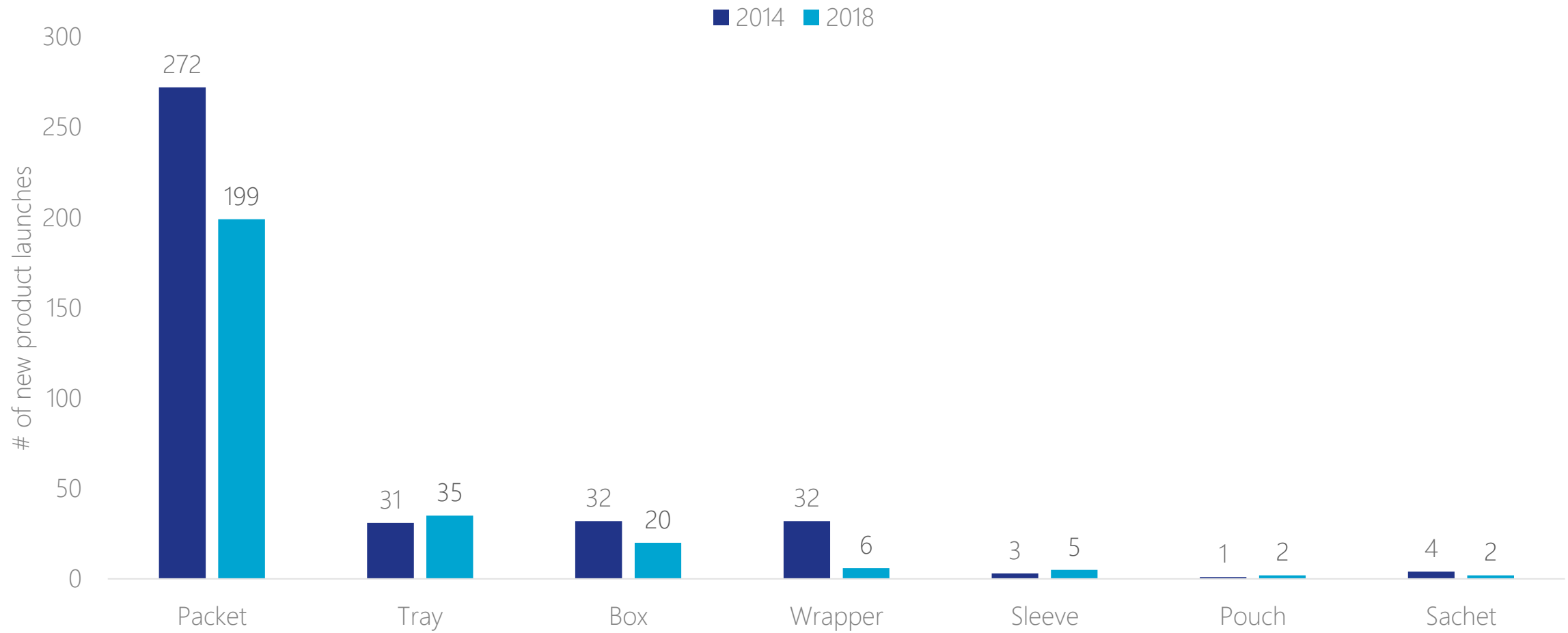
Packet leads bread & bread products while box and wrapper decrease

Packaging type as percentage (%) of bread & bread products new product launches tracked with traditional positioning (Europe 2014 vs. 2018)



Packet leads bread & bread products while box and wrapper decrease

Number of new bread & bread products with traditional positioning launches tracked per packaging type (Europe 2014 vs. 2018)



Innovation Opportunities in Bread & Bread Products with Traditional/Origin Seal - Europe



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Spotlight on ethical claims: animal, human and packaging

ENVIRONMENT



Mulino Bianco Pan Goccioli Con Gocce Di Cioccolato: Bread With Chocolate Chips

Italy, Apr 2019

CLAIMS ...No hydrogenated fats. Palm oil free. **100% renewable energy used on production.** Recyclable packaging.

HUMAN



La Boulangère Bio Tartines Quinoa Et Graines: Organic Toast Bread With Quinoa And Seed

France, Mar 2019

CLAIMS Certified AB Organic. Green Dot Certified. Environmental commitment. **Fairtrade. Local. Simple and good.** 1% for the planet.

PACKAGING

Roberts Bakery have switched to 100% recyclable packaging in a bid to reduce plastic waste

It's a first for the bread industry.



Roberts Bakery **Against Plastic** Rise Up Classic Wholemeal Bread

United Kingdom, Jun 2019

Well-established traditional claims in products without traditional/origin seal



Antica Forneria Di Recco La Farinata Genovese: Genoese Farinata

Italy, Feb 2019

CLAIMS Cooked in copper baking pans. Italian quick frozen food. **Traditional Genoese recipe.** This is a microwaveable product.



Toscanne Heerlijk Goudgeel Brood Met Traditionele Italiaanse Ingredienten: Delicious Golden Bread With Traditional Italian Ingredients

Belgium, Apr 2019

DESCRIPTION Delicious golden bread with **traditional Italian ingredients** in a 600g paper packet.



Specially Selected Traditionally Crafted 4 Sourdough Rolls

United Kingdom, Apr 2019

DESCRIPTION **Traditionally crafted** 4 sourdough rolls with a full of flavor, firm and soft dough in a paper tray, held in a plastic packet.

Free from claims find more shelf space

VEGAN / VEGETARIAN



Alba Bakeries 6 Potato Scones

United Kingdom, May 2019

CLAIMS Naturally sweet. **Suitable for vegan and vegetarian**. Certified organic. No yeast or soy. Eko certified.

GLUTEN FREE



Sainsbury's 2 Garlic And Coriander Naan Breads

United Kingdom, Feb 2019

CLAIMS Suitable for vegans. Suitable for freezing. Made with sustainable palm oil. Deliciously free from. **Gluten free**. Milk free...

LACTOSE FREE



Bimbo Natural 100% Integral: 100% Natural Wholegrain Bread

Spain, May 2019

CLAIMS New image. Without milk. **Lactose free**. Without preservatives or additives. 100% natural. Wholegrain. Green Dot Certified. Recyclable packaging. Nutritional commitment: low in sugars, low in saturated fat, fiber source.

Fiber claims retain a significant role



Harry Chia Balance Sandwich Bread

Germany, May 2019

CLAIMS **Source of fiber** and omega 3 fatty acids. Harry warranty. Harry stands for quality and freshness. If you are not satisfied, we will replace it without hesitation. Recyclable packaging.



Promise Gluten Free Seeded Sandwich Slims

Ireland, May 2019

CLAIMS Gluten free. **High fiber**. Dairy free. Low saturated fat and delicious. We promise you'll love the taste. Suitable for vegetarians.



Laci Musu Rudzu Maize Ar Seklam: Rye Bread With Seeds

Latvia, May 2019

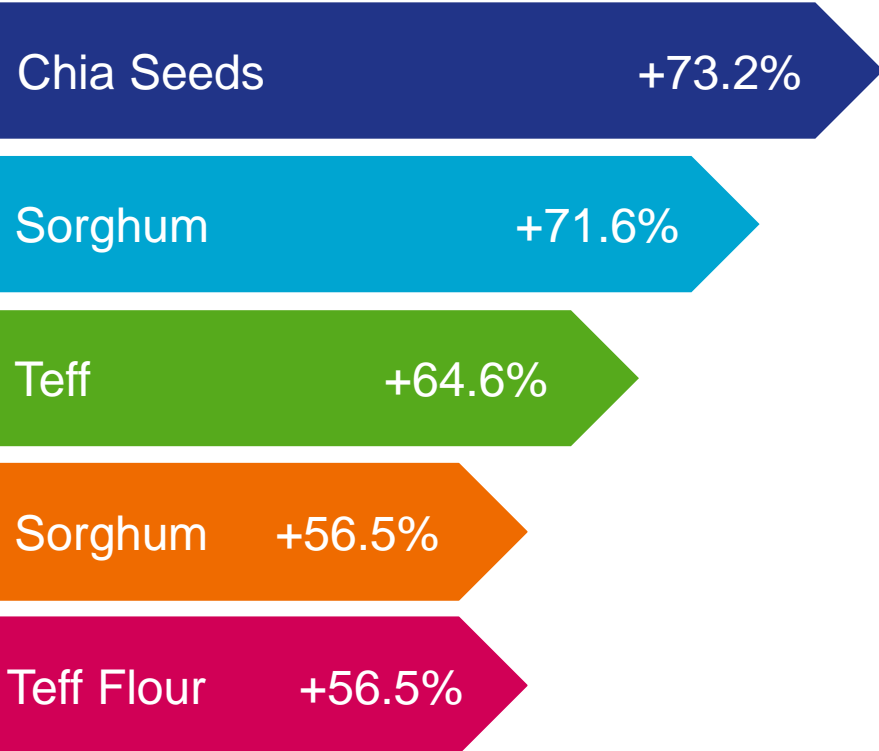
CLAIMS Bread created for 100 years anniversary for Latvian independence. Natural product. Hand made. No preservatives. **Source of fiber**. Green Dot Certified.

Highlight on ancient grains

- Ancient grain varieties, also sometimes referred to as heritage grains, is another major drive right now, and in no small part fueled by both the gluten and wheat free trends.

Fastest growing ancient grains in new bread & bread products launches tracked (Europe, CAGR 2014-2018)

CAGR ('14-'18)



Sellton Martas Chia Brod: Chia Bread

Sweden, May 2019



Panrico Sliced Bread With 14 Cereals And Seeds

Spain, Mar 2019

DESCRIPTION: Sliced bread with fourteen cereals, seeds and olive oil in a plastic packet. Baked with a choice of 14 cereals and seeds (wheat, spelt, sunflower, oats, Khorasan, barley, rye, sorghum, millet, rice, corn, teff, saracen, flax).

Processing description adds novelty to bread and bread products



Sloow Bio Ciabatta Broodjes: Organic Ciabatta Buns

Netherlands, Jan 2019

CLAIMS Certified organic. Organic ingredients. Sloow bread has a natural, **long fermentation process of flour and water, as the Egyptians have previously discovered.** This gives you bread with an airy structure and flavor aromas are released that are necessary to create the best taste. **Then our bread is baked in a stone oven so that it gets a tasty, crispy crust.** And we take no less than 24 to 30 hours. Bake off in 8 minutes.



Asda Extra Special Hand Crafted White Ciabatta Loaf

United Kingdom, May 2019

DESCRIPTION Handcrafted white ciabatta loaf in a plastic packet. **Handcrafted with extra virgin olive oil (4%) and slowly fermented for a delightfully light centre and crisp crust.**

Sourdough bread on the spotlight

- Products that satisfy the desire for traditional ingredients as well as having a probiotic effect and delivering a unique taste experience without additional flavors are a perfect fit for future growth. In this context, sourdough bread is expected to increase.

30%

Average annual growth of 'sourdough' claim in bread & bread products in Europe (CAGR, 2014-2018)



Ostras Stenugnsbrod: Stone Oven Baked Bread

Sweden, Mar 2019

CLAIMS A old fashion **sourdough that flavors like old days.**



The Bertinet Bakery Seeded Sourdough Loaf

United Kingdom, Apr 2019

DESCRIPTION Sliced, seeded **sourdough loaf made with just flour, water, sea salt and seeds**

Traditional flavors with perennial products offer

CHEESE



Hema Cheese Twists Bread

Netherlands, Jan 2019

HERBS



Maitre Jean Pierre Herb Baguettes

Serbia, Jan 2019

GARLIC



Becky's Knoflookbrood: Garlic Bread

Belgium, Jan 2019

CHOCOLATE



Delhaize Chocoladebroodjes: Chocolate Rolls

Belgium, May 2019

A touch of indulgence from fruit combinations



Warburtons Fabulous Fruit Loaf

United Kingdom, Mar 2019

DESCRIPTION Deliciously soft, thick sliced fruit loaf full of plump and juicy **raisins, cranberries, currants and sultanas**, in a 400g plastic packet.



Asda Extra Special 4 Bramley Apple And Cinnamon Hot Cross Buns

United Kingdom, Mar 2019

DESCRIPTION Four hot cross buns with **Bramley apple puree, sultanas** and cinnamon, in a paper tray, held in a plastic packet.



Zijerveld Kletzenbrood: Dark Bread With Dried Fruit

Netherlands, Jan 2019

DESCRIPTION Sliced dark bread with dried fruit in a paper tray, held in a plastic packet. A dark, solid bread that is generously filled with **figs, pears, plums**, walnuts, hazelnuts, raisins, spices and rum.

Vegetables provide natural color and flavor to bread & bread products

KALE



Sainsburys Love Your Veg Kale Pizza Base

United Kingdom, Jan 2019

CARROT



Mission Kids Disney Kitchen 6 Carrot Flavoured Wraps

United Kingdom, Dec 2018

BEETROOT



El Horno De Mercadona Focaccia De Remolacha: Beetroot Focaccia

Spain, Feb 2019

Sprouted grains products aplenty

- Sprouting process breaks down some of the starch, which makes the percentage of nutrients higher. For its association with health benefits, bread products made of sprouted grains are becoming increasingly popular.



Gaia Pain De Cereales Germees Seigle: Sprouted Cereal Rye Bread

France, Apr 2019

CLAIMS ...Gaia has been developing innovative products that fit perfectly into a varied and balanced diet that respects the environment: germination: breads, cakes, macaroons, etc. **Based on cereals and sprouted seeds**... Raw food: good ingredients deserve to be eaten raw...



Terra Sana Pan Germinado: Sprouted Wheat Bread

Spain, Feb 2019

CLAIMS **Positive eating**. Natural. Certified organic. Yeast free. No added salt. Suitable for vegans.



Everfresh Sprouted Wheat Bread With Fruit And Almonds

United Kingdom, May 2019

CLAIMS This product is free from added sugar, fat, salt, egg, yeast or dairy. Free from preservatives. Certified organic. **Baked with the goodness of whole sprouted grains**, sweet raisins, dates and almonds.

New bread & bread products shapes to catch consumer's eyes



Delicieux Breekbrood Met Maïs: Break Bread With Corn

Netherlands, Apr 2019



Jumbo Winter Topper Eland Broodjes: Moose Bread

Netherlands, Dec 2018



Asda 4 Unicorn Crumpets

United Kingdom, Jun 2019

Key learnings & What's next ?



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Key learnings & What's next ?

Artisan and specialty breads increasingly feature

As the market has developed, interest in artisan and specialty breads has helped to drive new product development. In addition to more traditional wholegrain and seeded lines, there has been rising interest in flatbreads, such as wraps, naans and pita, opening space for other new formats from regional breads.

Fragmented flavor activity

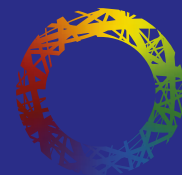
The bread and bread products subcategory remains largely unflavored, with garlic and cheese the most popular flavors. There is some activity in more unusual sweet (cranberry, apricot, dark chocolate) and savory (kale, leek, coriander, parsley and basil) flavors, although it remains at a low level.

Ancient grain continues to thrive

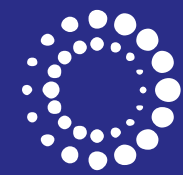
There is a growing consumer interest in simpler, traditional and old ingredients. Ancient grains provide new flavors and health benefits while they are comforting and familiar at the same time, In this context, we expect to see a growing offering employing a wider variety of flours and flour mixes beyond wheat and rye, with a focus on teff, chia, quinoa and other gluten free grains.

Fermented products on the rise

The fermented products trend, which is still building, will continue to contribute to sourdough bread's growing perception as a health food. This is specially important because traditional products can benefit from the artisanal coupled with health and nutritional aspects image sourdough has, to communicate with consumers these claims that are also associated with tradition and old style products.



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