

An aerial night view of a city, likely Shanghai, with a dense grid of buildings and streets illuminated. Overlaid on the city are several glowing white arcs and dots, creating a network or globe-like structure. The sky is dark blue with some clouds and a few bright stars or distant lights.

# Traditional Products – Innovation Landscape Cakes - Pastries & Sweet goods

# 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: Cakes - Pastries & Sweet Goods
- 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 Cakes - Pastries & Sweet Goods - Europe



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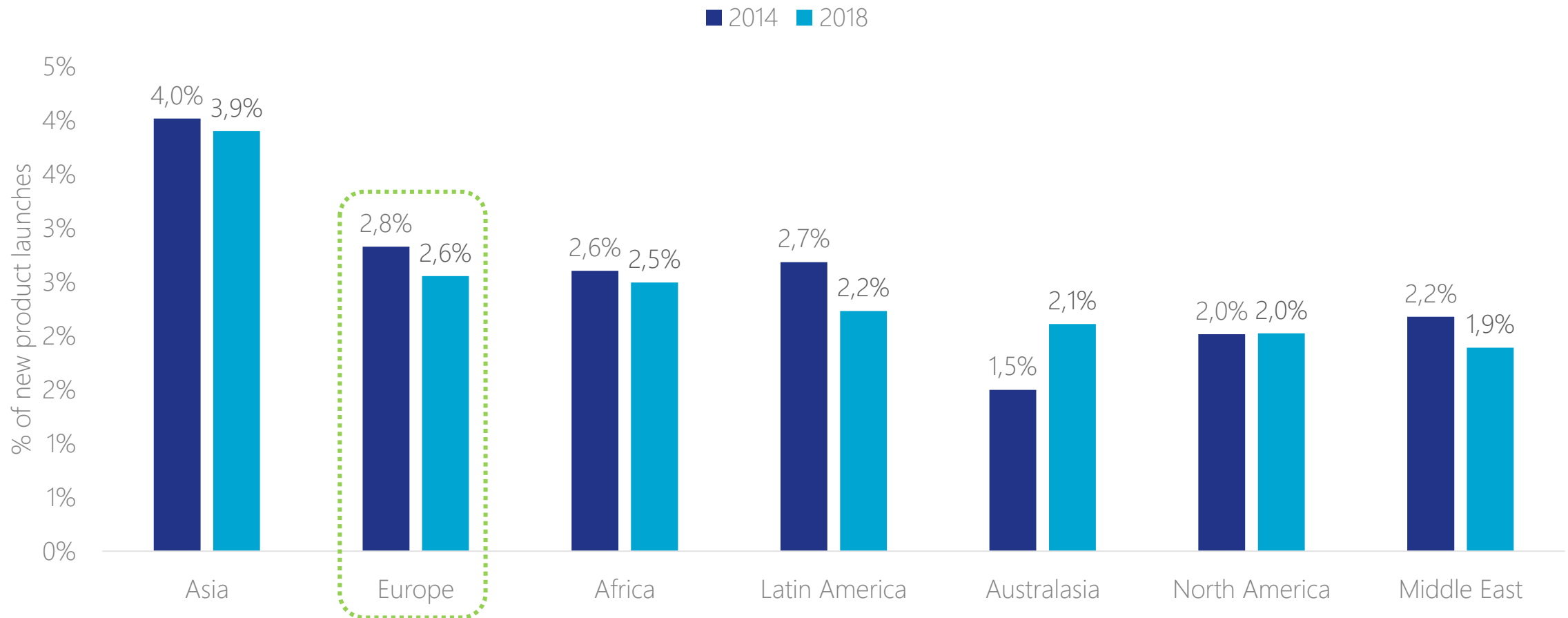


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# Cakes - pastries & sweet goods presence has decreased in Europe

- Cakes - pastries & sweet goods presence has decreased in Europe from 2.8% in 2014 to 2.6% of all F&B product launches tracked, while Asia has the strongest presence of cakes - pastries & sweet goods in F&B.

Cakes - pastries & sweet goods products as percentage (%) of F&B new product launches tracked per region (2018 vs. 2014)

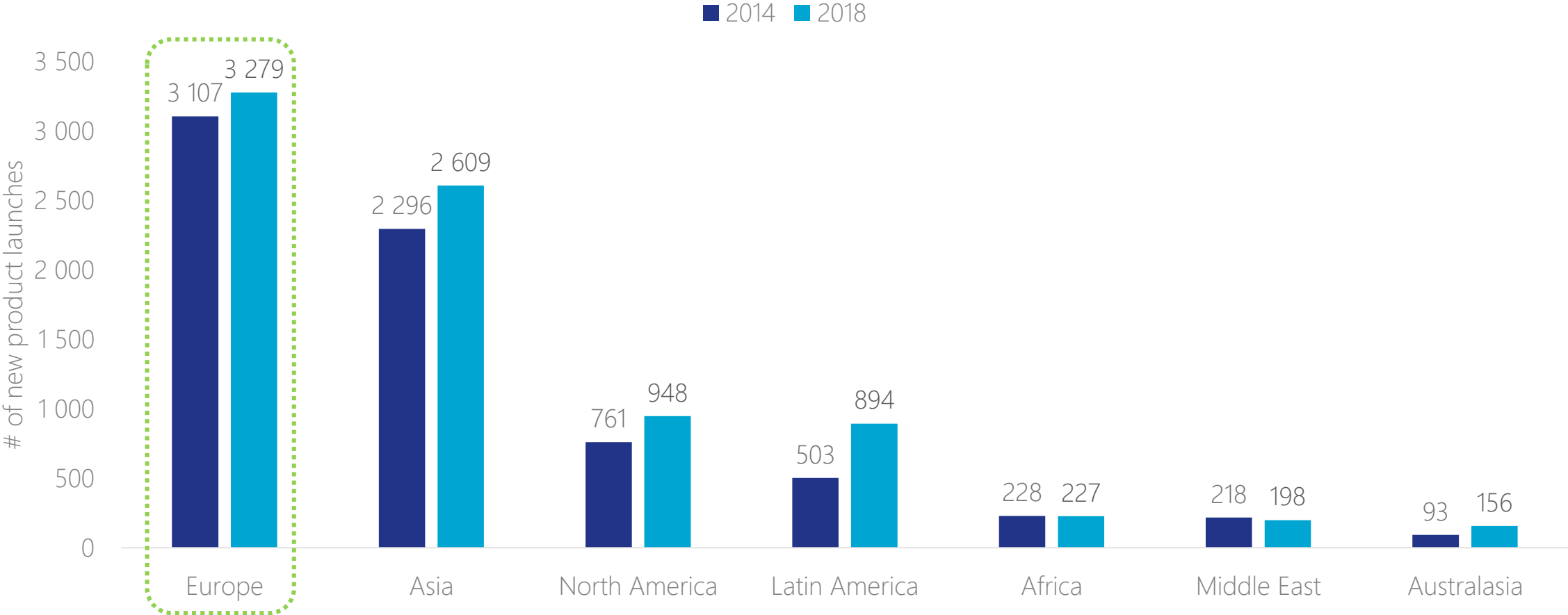




# Europe leads cakes - pastries & sweet goods new product launches

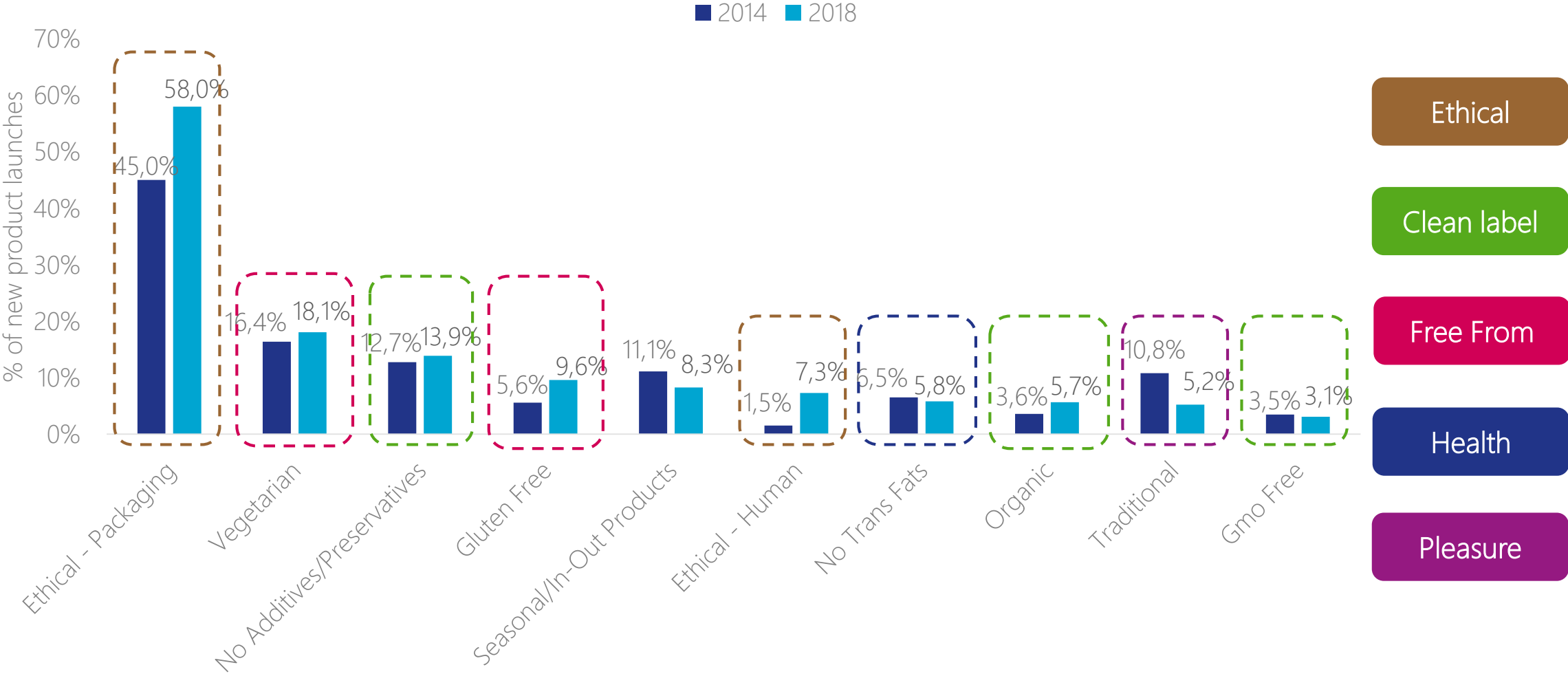
- Latin America is the fastest growing region. Africa and Middle East are the only regions with decreasing cakes - pastries & sweet goods product launch activity.

Number of cakes - pastries & sweet goods new product launches tracked per region (2018 vs. 2014)



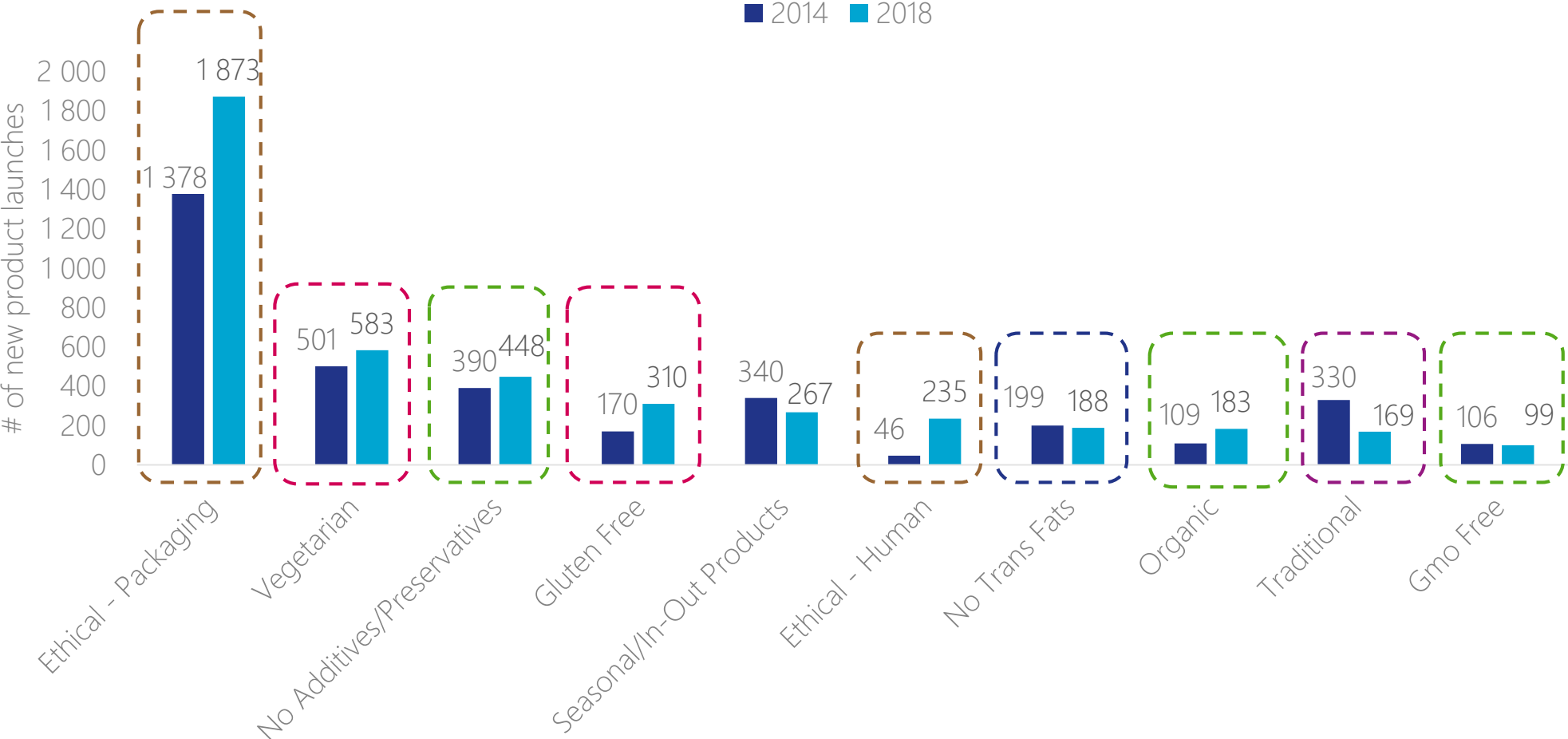
# Ethics lead in cakes - pastries & sweet goods positionings in Europe

Top positionings as percentage (%) of cakes - pastries & sweet goods new product launches tracked (Europe, 2018 vs. 2014)



# Ethics lead in cakes - pastries & sweet goods positionings in Europe

Number of cakes - pastries & sweet goods new product launches tracked per positioning (Europe, 2018 vs. 2014)



Ethical

Clean label

Free From

Health

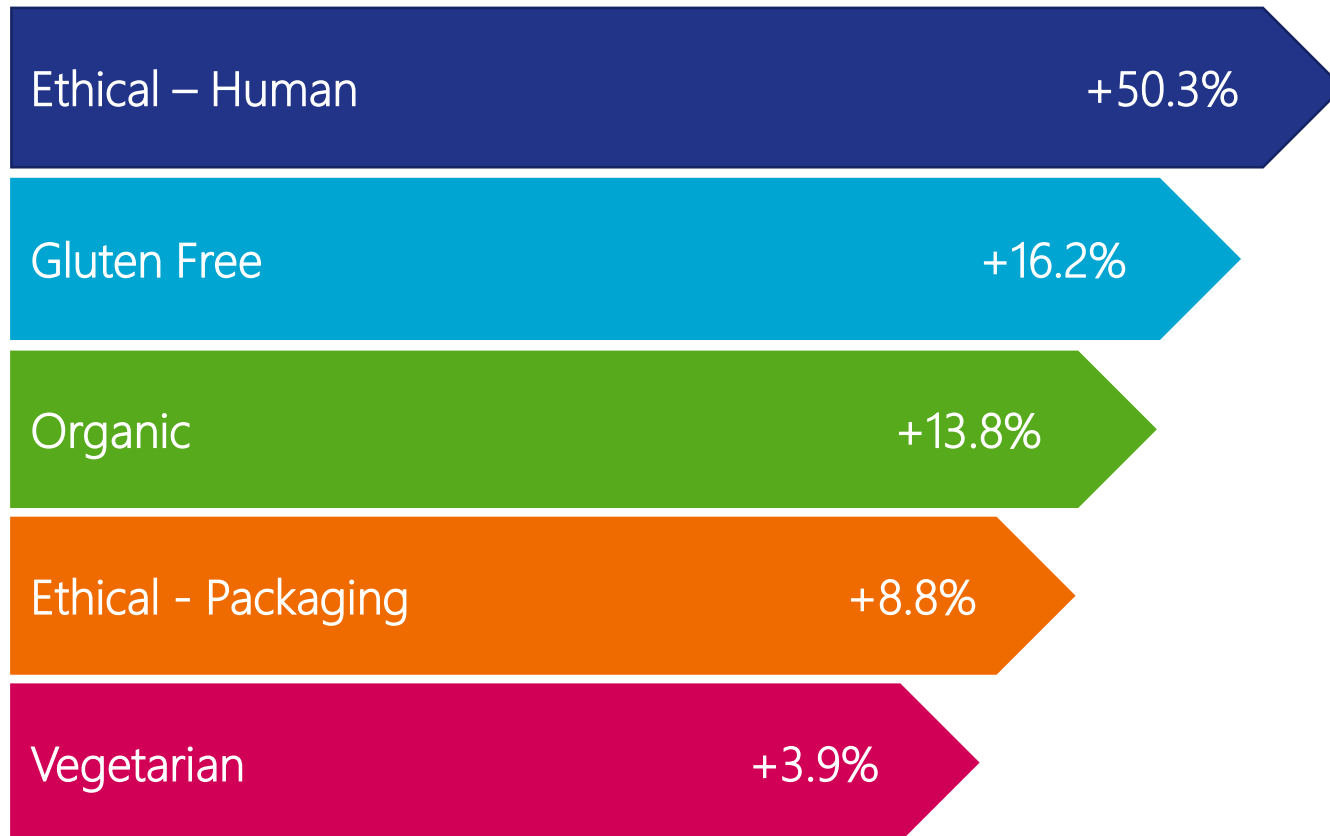
Pleasure



# Ethical claims are fastest growing in European cakes - pastries & sweet goods

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

CAGR ('14-'18)

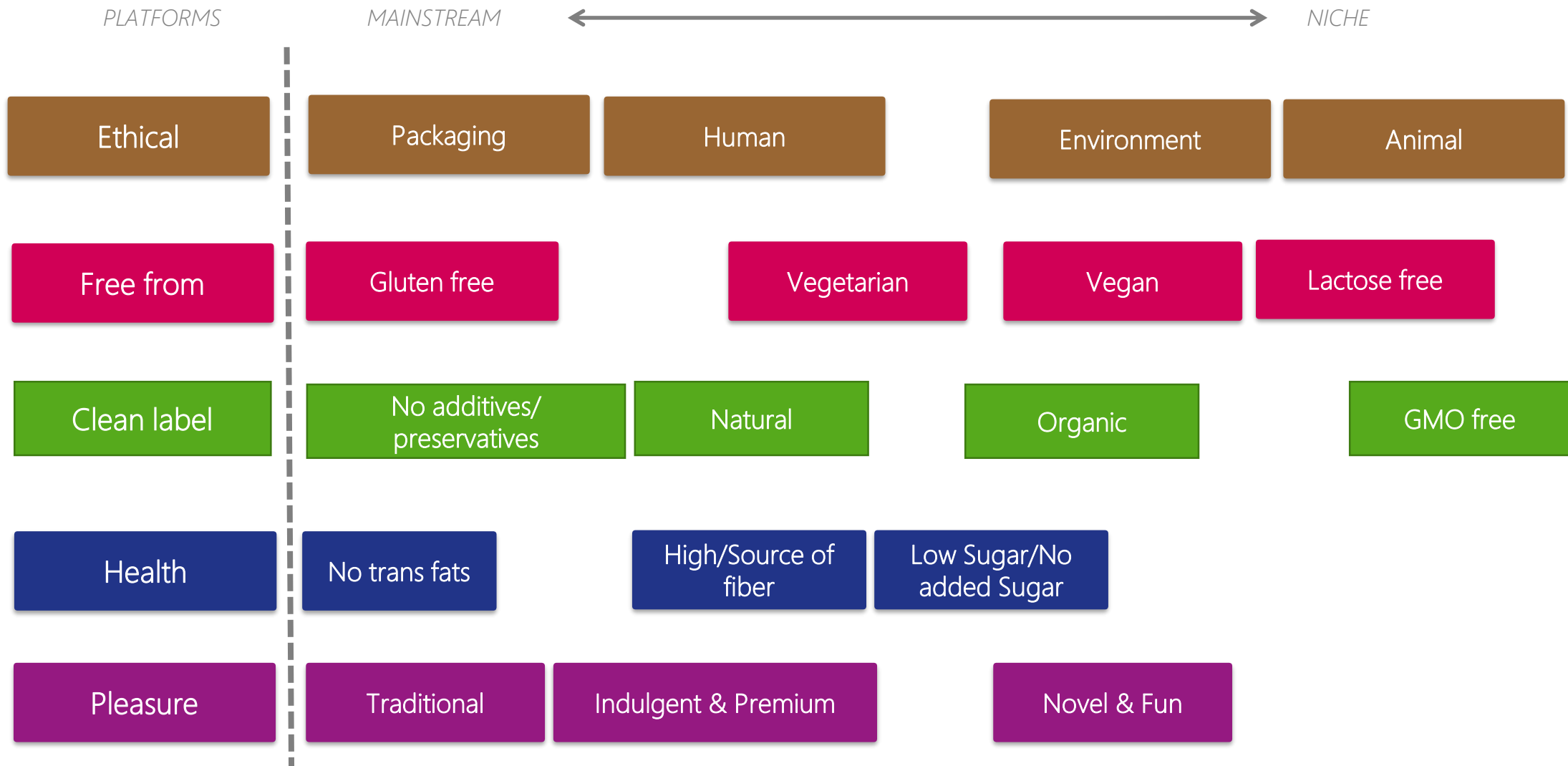


**Choco Bistro Jaffa Cake Himbeere Zartes Gebäck Mit Fruchtiger Füllung Und Schokolade: Raspberry Pastry With Fruity Filling And Chocolate**

Germany, Mar 2019

CLAIMS **Fairtrade cocoa program.** Green Dot Certified.

# Key innovation platforms in cakes - pastries & sweet goods products





# European Consumer Insights in Sweet Baked Goods



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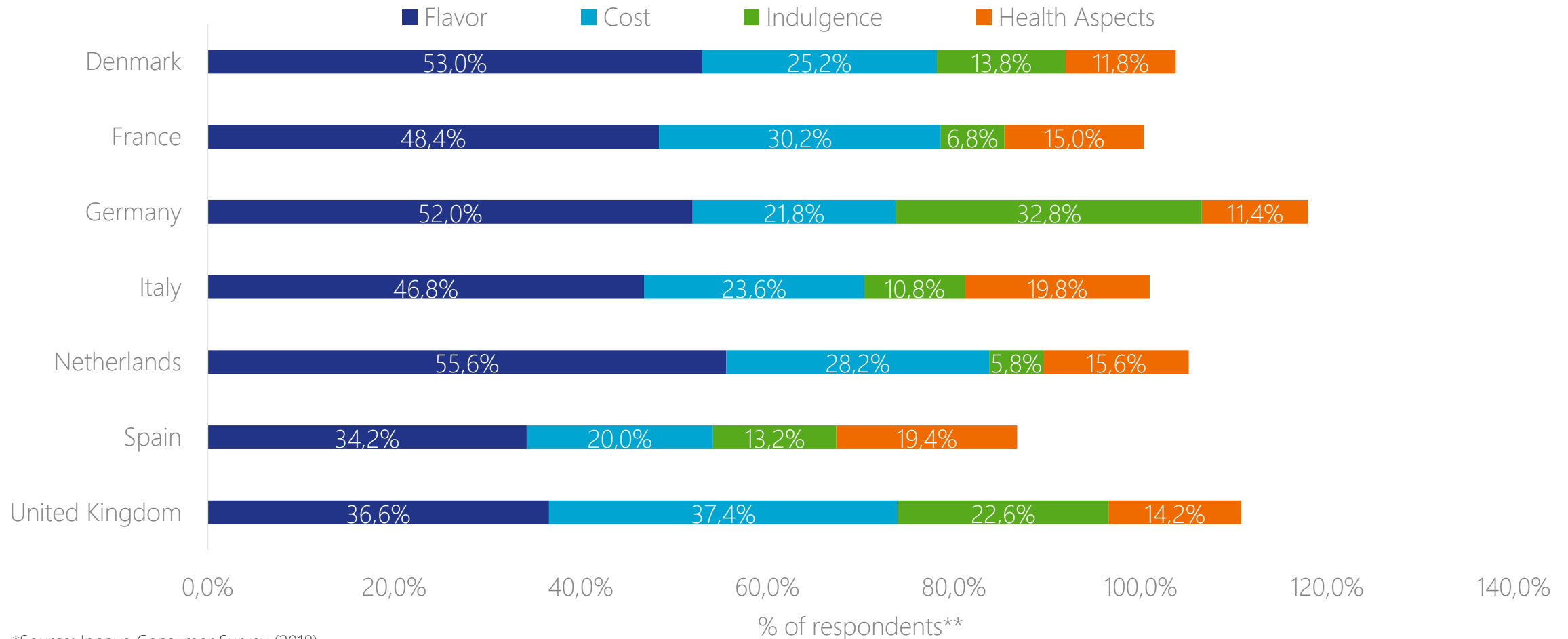


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# Flavor is top factor consumers pay importance in sweet baked goods

What factors do you pay importance to when buying sweet baked goods?\* (Europe, 2018)



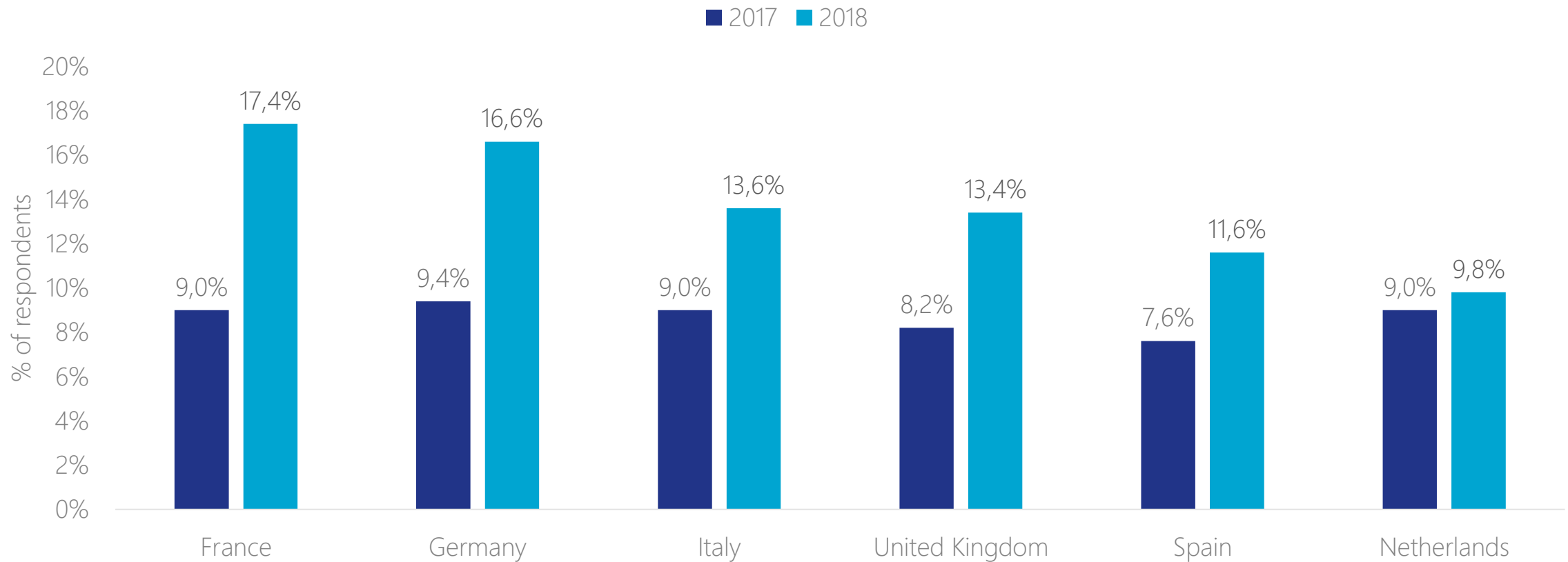
\*Source: Innova Consumer Survey (2018)

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

# Sweet baked goods consumption increased most in France

- France leads growth but all the analyzed countries had positive results when comparing 2018 to 2017.

Have you increased your consumption of sweet baked goods over the last year? Answer: Yes\* (Europe, 2018 vs. 2017)

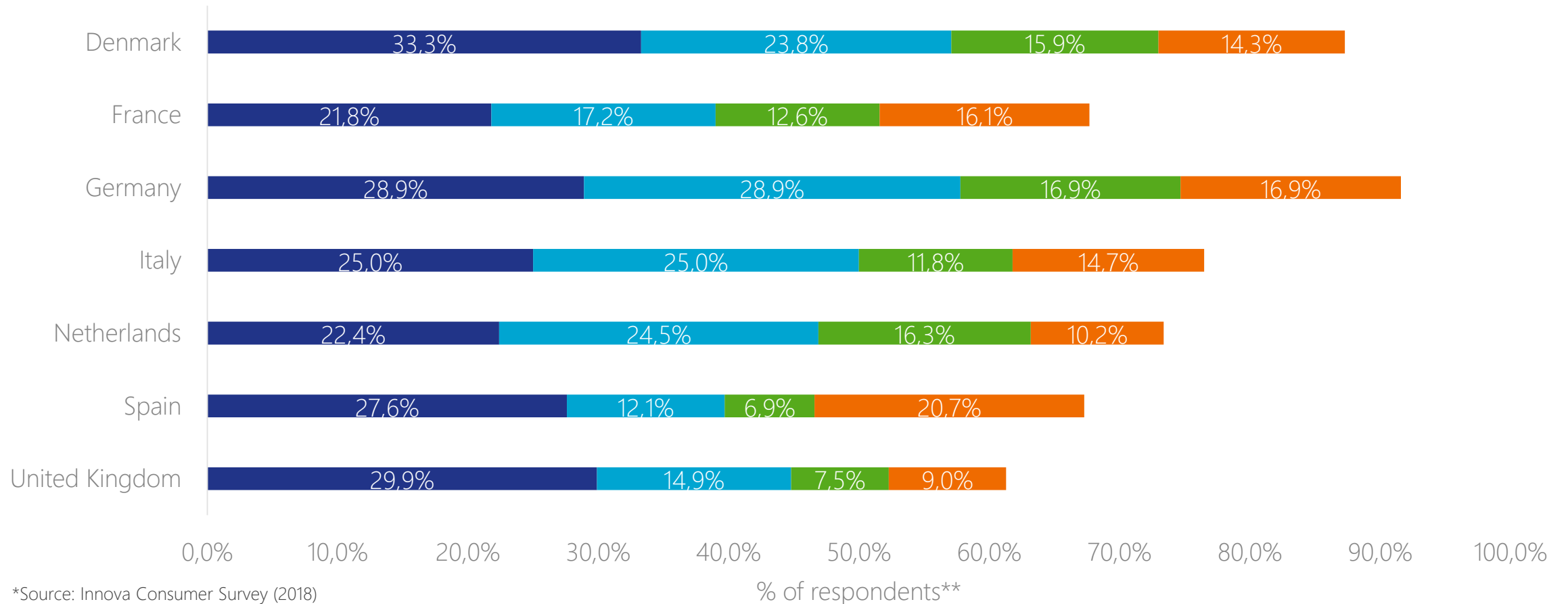


\*Source: Innova Consumer Survey (2018) and Innova Consumer Survey (2017)  
% of consumers who have increased consumption.

# Novelty is the main driver for sweet baked goods consumption

Why have you increased your consumption of sweet baked goods?\* (Europe, 2018)

■ There is more variety and novelty available ■ My taste preference has changed ■ My needs have changed ■ Due to a chance in my budget



\*Source: Innova Consumer Survey (2018)

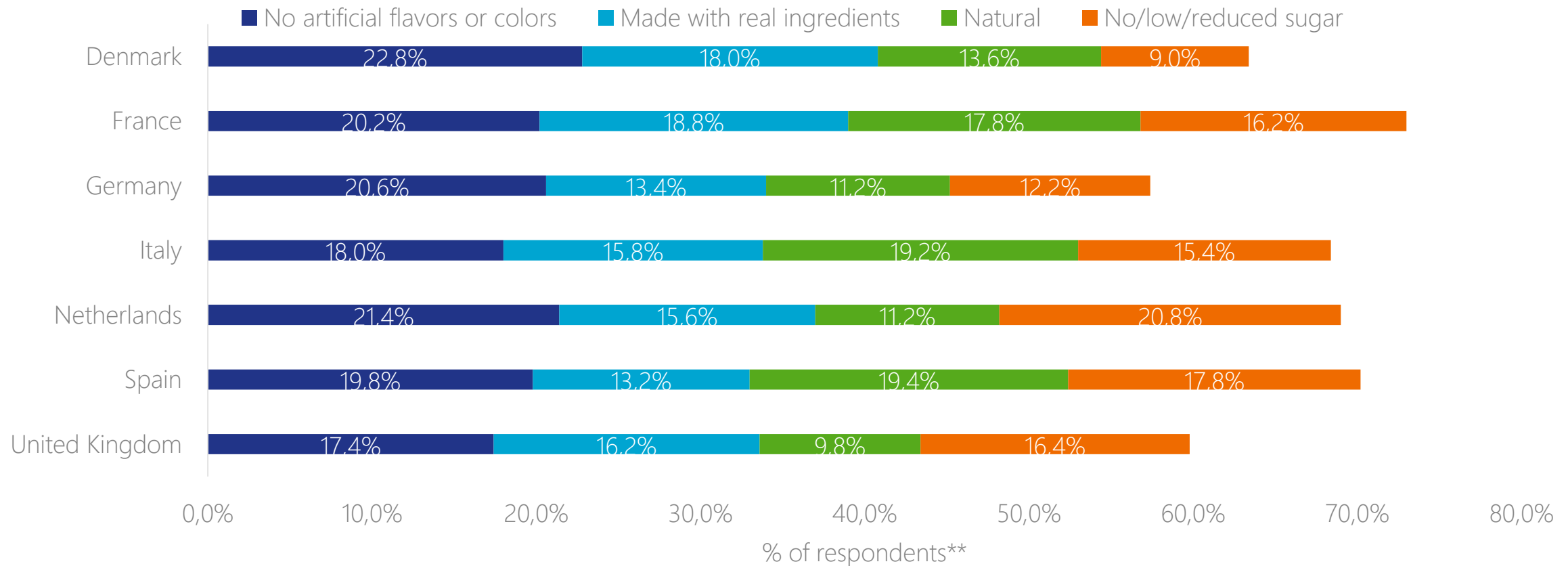
\*\*Results may be greater than 100% due to multiple answers by consumers.



# No artificial flavors or colors influences most sweet baked goods purchase

- “No artificial flavors or colors” is the leading factor influencing purchase of sweet baked goods. Sugar reduction is an increasing concern in all analyzed countries.

**Choose up to three factors that most influence your purchasing decision when purchasing sweet baked goods?\***  
(Europe, 2018)



\*Source: Innova Consumer Survey (2018)

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

# Physical stores lead sweet baked goods purchase, specially mass retailers

Where do you typically purchase sweet baked goods?\* (Europe, 2018)



\*Source: Innova Consumer Survey (2018)

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



# Overview of Trends in Traditional Cakes – Pastries & Sweet Goods - Europe



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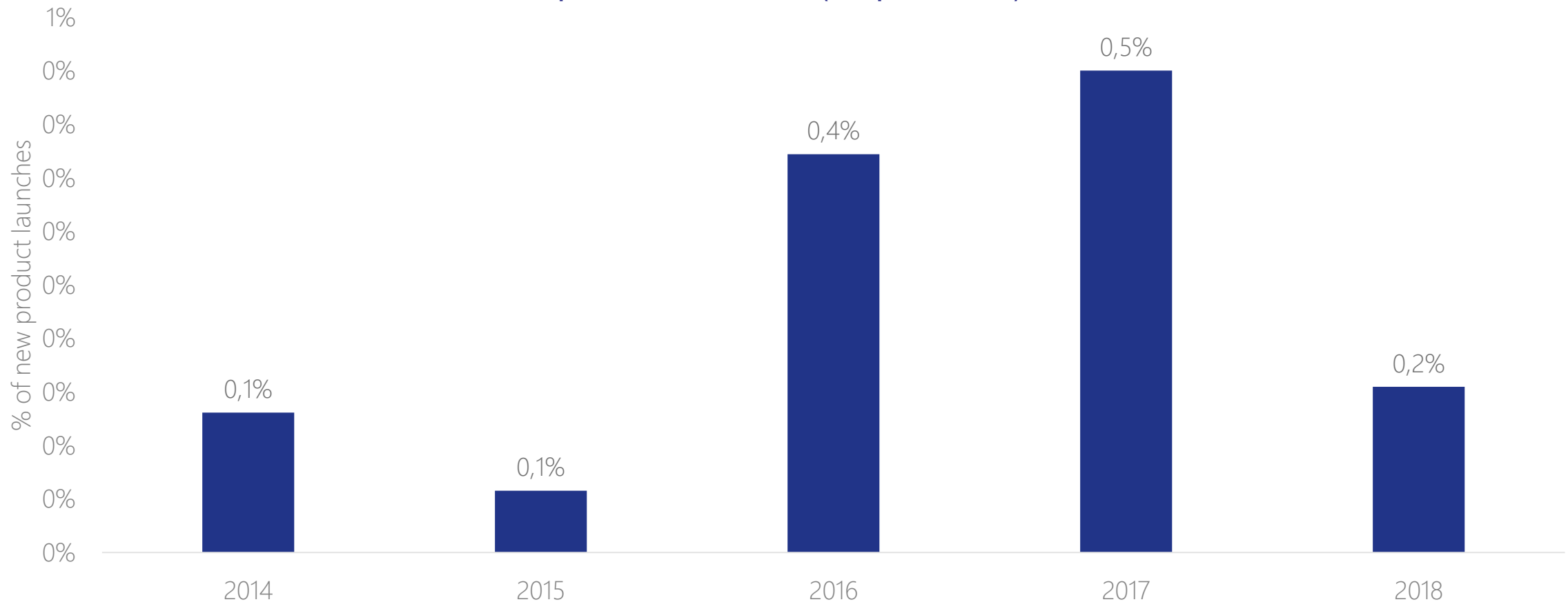
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# Origin seal decreasing presence in cakes – pastries & sweet goods

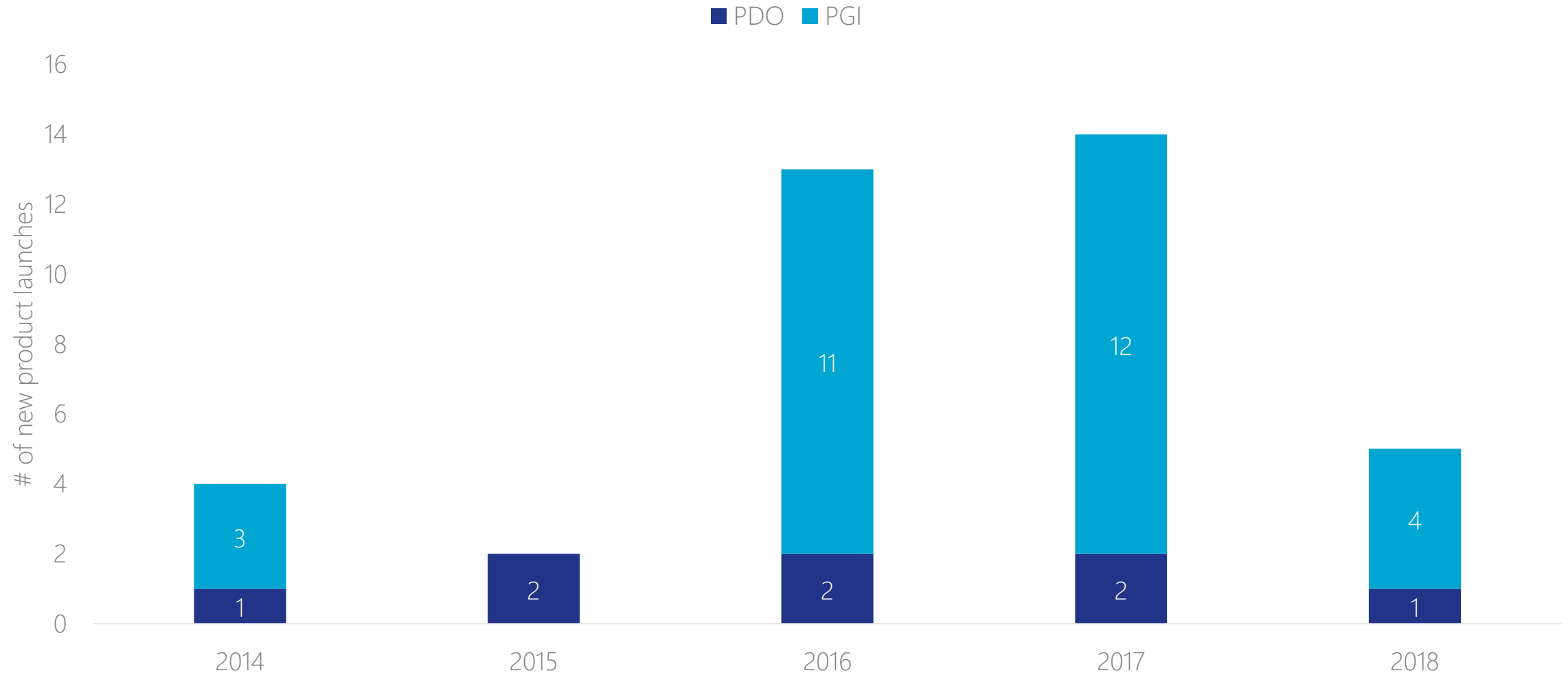
- With small penetration in cakes – pastries & sweet goods, traditional/origin seal reached a peak in 2017 in Europe, but decreased in 2018.

Share of cakes – pastries & sweet goods with traditional/origin seal as percentage (%) of new cakes – pastries & sweet goods product launches tracked (Europe, 2014-2018)



# 2017 is the year with highest NPD with origin seals in pastries & sweet goods

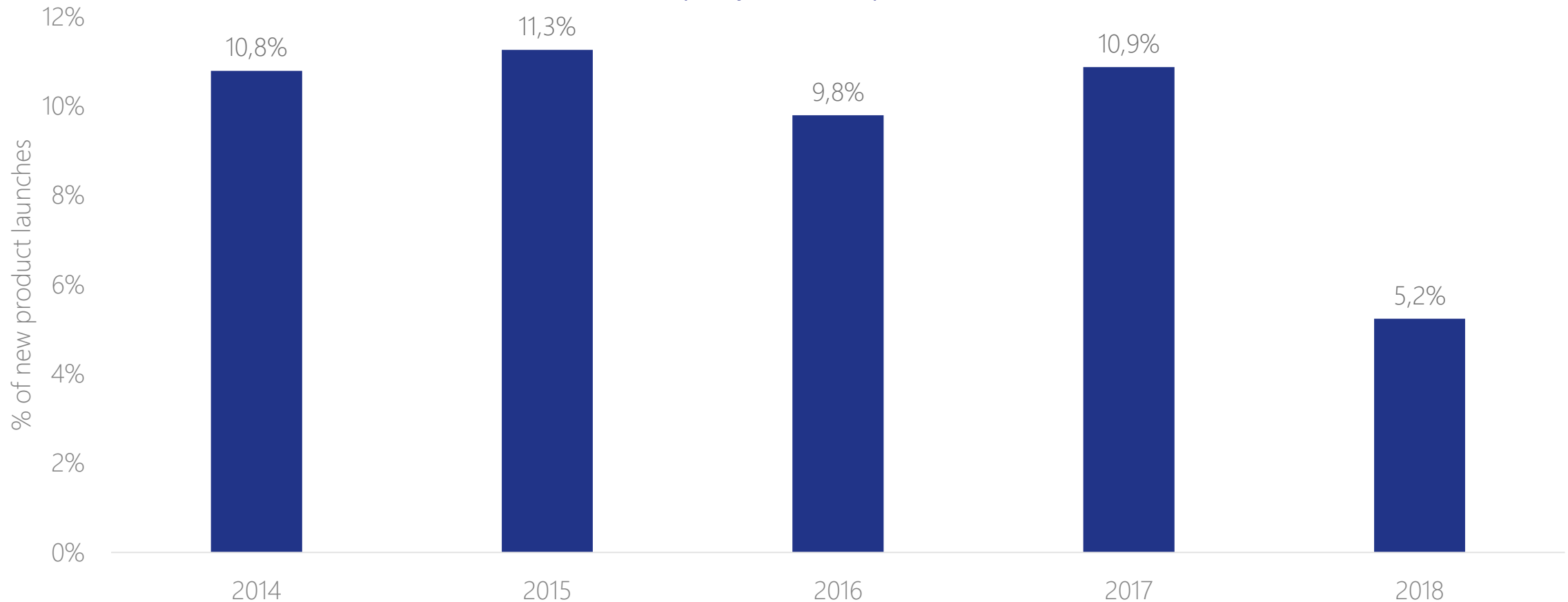
Number of new cakes – pastries & sweet goods products launches tracked with traditional/origin seal (Europe, 2014-2018)



# Traditional positioning is decreasing in cakes – pastries & sweet goods

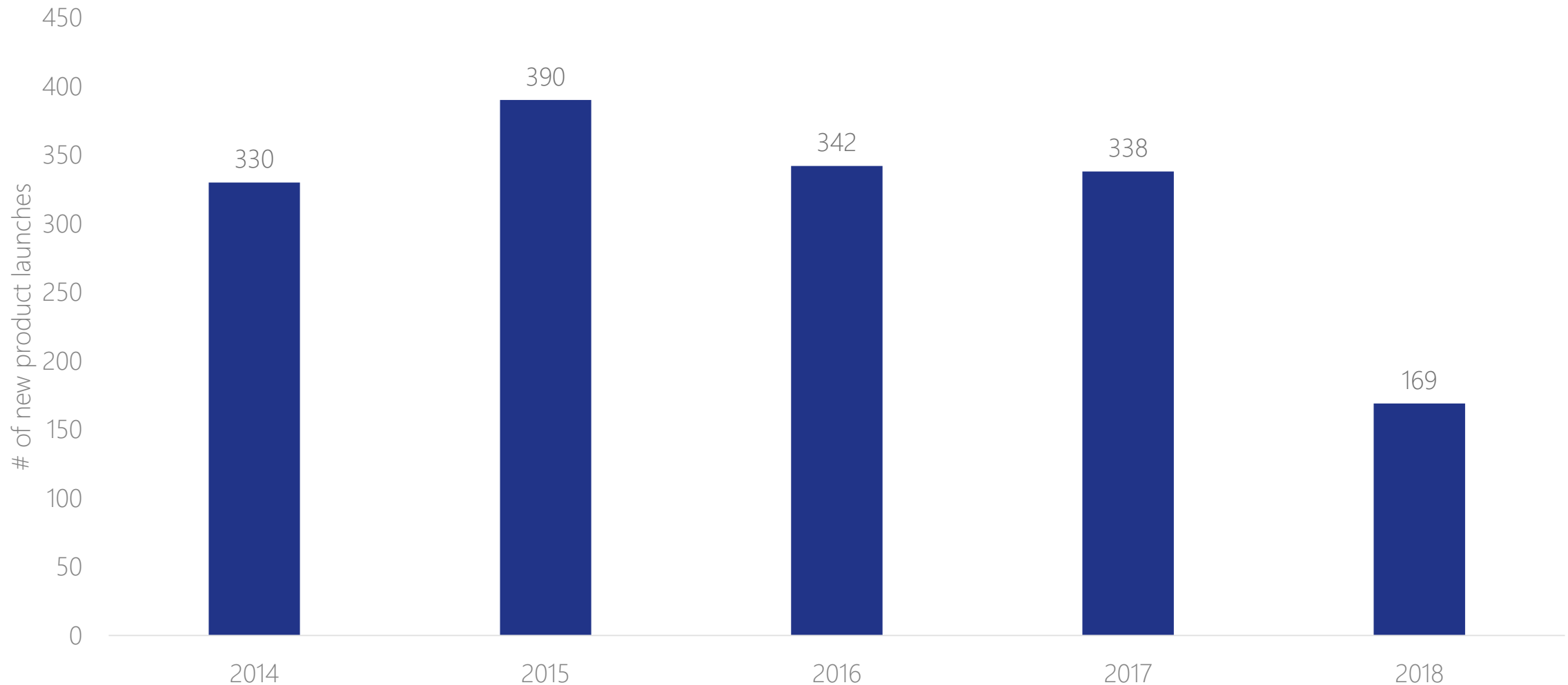
- Traditional positioning presence was stable until 2017, however in 2018 it decreased by half reaching 5.2% penetration in cakes – pastries & sweet goods in Europe.

Share of traditional positioning as percentage (%) of new cakes – pastries & sweet goods product launches tracked (Europe, 2014-2018)



# Traditional positioning is decreasing in cakes – pastries & sweet goods

Number of new cakes – pastries & sweet goods products with traditional positioning launches tracked (Europe, 2014-2018)



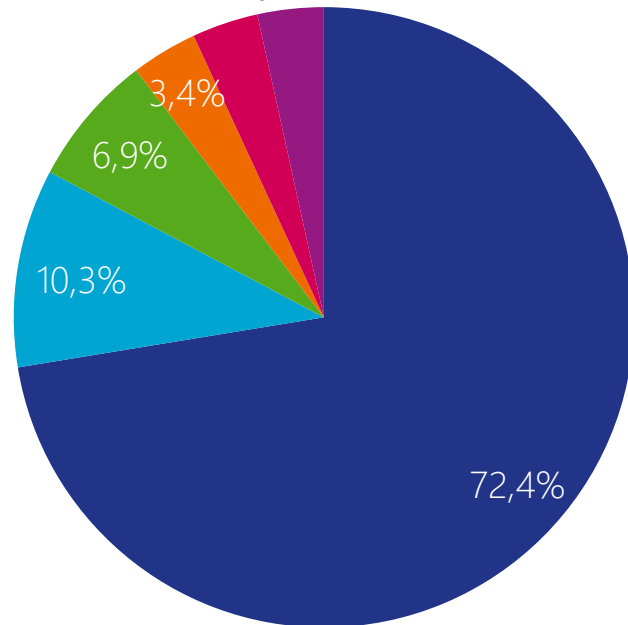


# Spain leads new launches with origin seal and UK leads traditional claims

- Spain leads product launches activity in products with traditional/origin seal, but United Kingdom launches more products with traditional positioning regardless the seal. In traditional positioning the market is more competitive with more players and products from other countries whereas in origin seal the market is smaller.

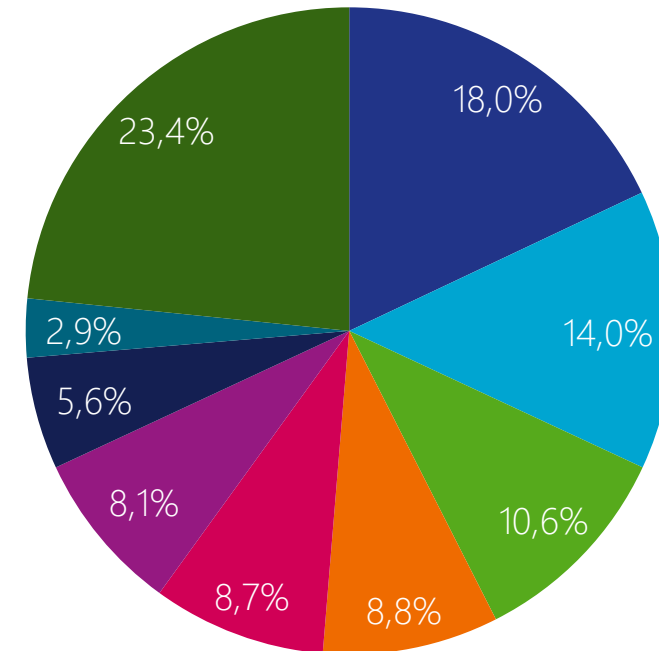
**Top countries as percentage (%) of new cakes – pastries & sweet goods product launches tracked with traditional/origin seal (Europe, 2014-2018)**

■ Spain                      ■ France                      ■ United Kingdom  
■ Belgium                      ■ Italy                      ■ Macedonia



**Top countries as percentage (%) of new cakes – pastries & sweet goods product launches tracked with traditional positioning (Europe, 2014-2018)**

■ United Kingdom                      ■ Italy                      ■ Germany  
■ Netherlands                      ■ France                      ■ Spain  
■ Russia                      ■ Greece                      ■ Rest of Europe

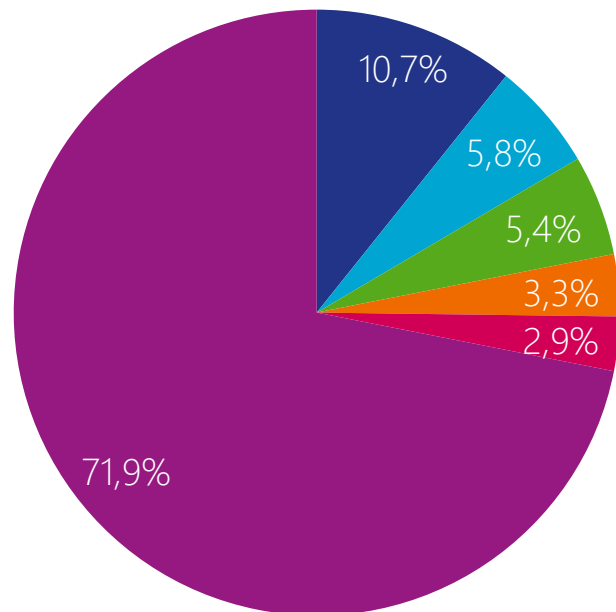


# Les Chevaliers is the top company with traditional positioning in 2018

- European market for cakes – pastries & sweet goods with traditional positioning is fragmented with few launches per player and none concentrates majority of product launches.

**Top companies as percentage (%) of new cakes – pastries & sweet goods product launches tracked with traditional positioning (Europe, 2014)**

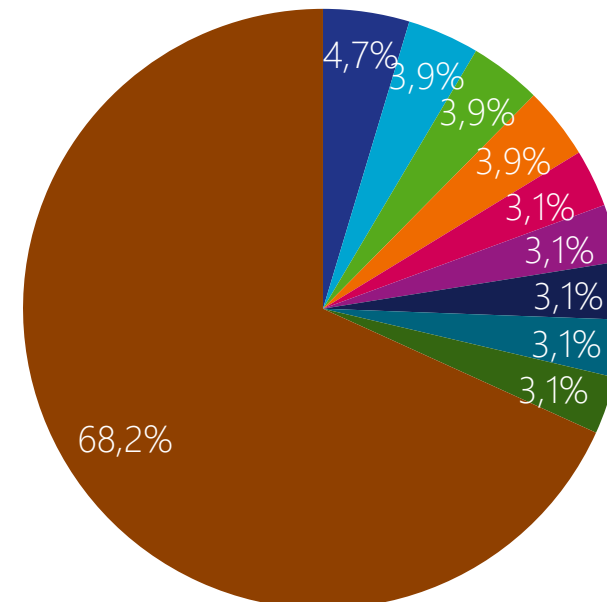
- Balocco
- Aldi
- The Little Round Cake Company
- Lidl
- Hema
- Other companies\*



\* Other companies = 87 companies

**Top companies as percentage (%) of new cakes – pastries & sweet goods product launches tracked with traditional positioning (Europe, 2018)**

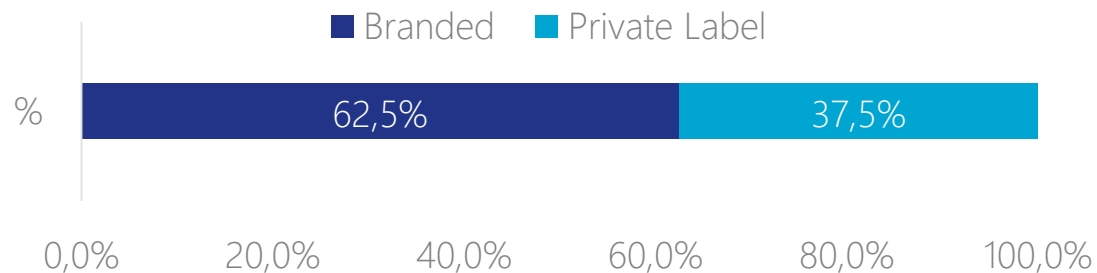
- Les Chevaliers
- Holmes Bakery
- Fresh Fayre
- Other companies\*\*
- Denise's Delicious
- Bauli
- Jan Linders
- Goldfein
- Fortwenger
- Lidl



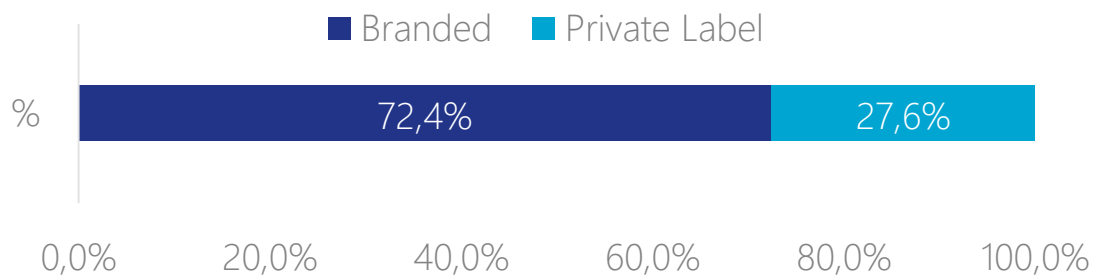
\*\* Other companies = 53 companies

# Branded products lead cakes – pastries & sweet goods product launches

Share of branded and private label as percentage (%) of new cakes – pastries & sweet goods product launches tracked with traditional/origin seal (Europe, 2014-2018)



Share of branded and private label as percentage (%) of new cakes – pastries & sweet goods product launches tracked with traditional positioning (Europe, 2014-2018)



## Peccati Medioevali Ricciarelli Di Siena: Siennese Almond Cake

Italy, Feb 2019

CLAIMS Handmade product. Made with Italian almonds. Gluten free. Protected Geographical Indication logo.



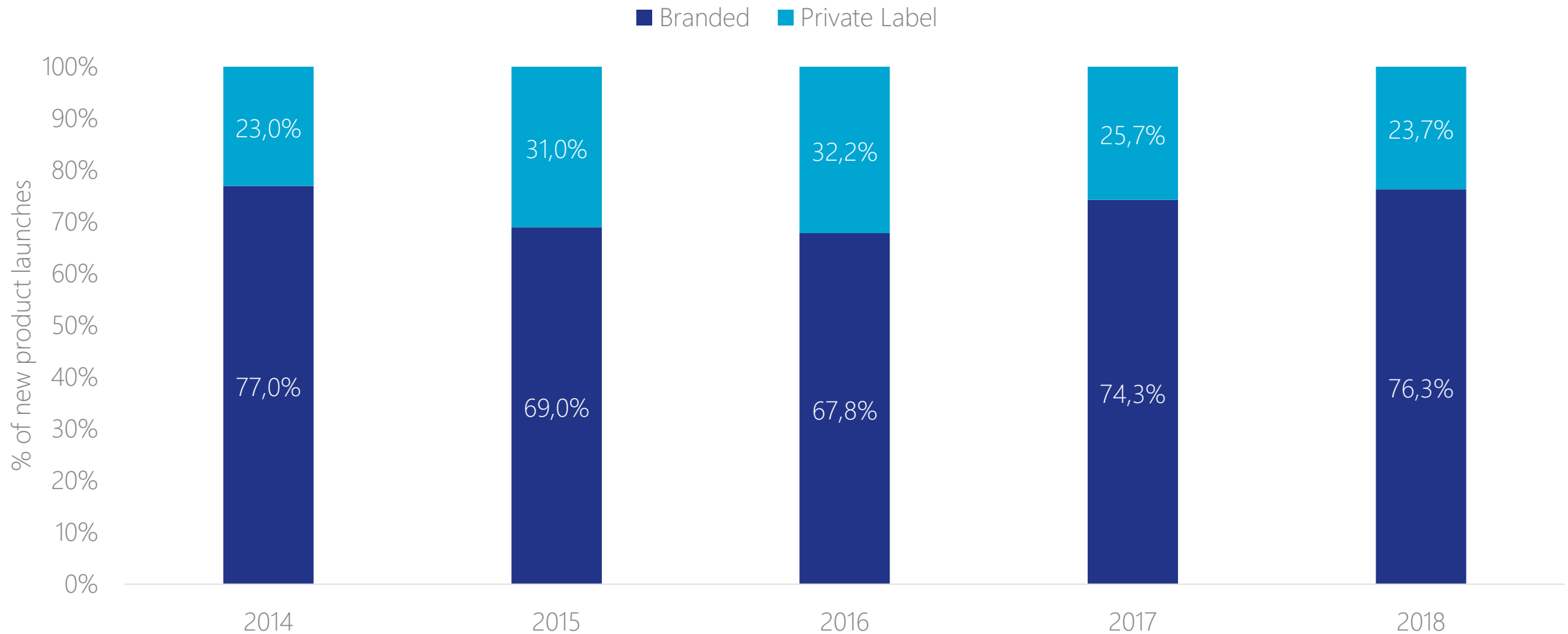
## Lambertz Lebkuchen Mischung: Assorted Gingerbread

Germany, Dec 2018

CLAIMS Premium edition. Fairtrade certified. Protected Geographical Indication logo. Green Dot Certified.

# More branded products with traditional positioning and absence of seal

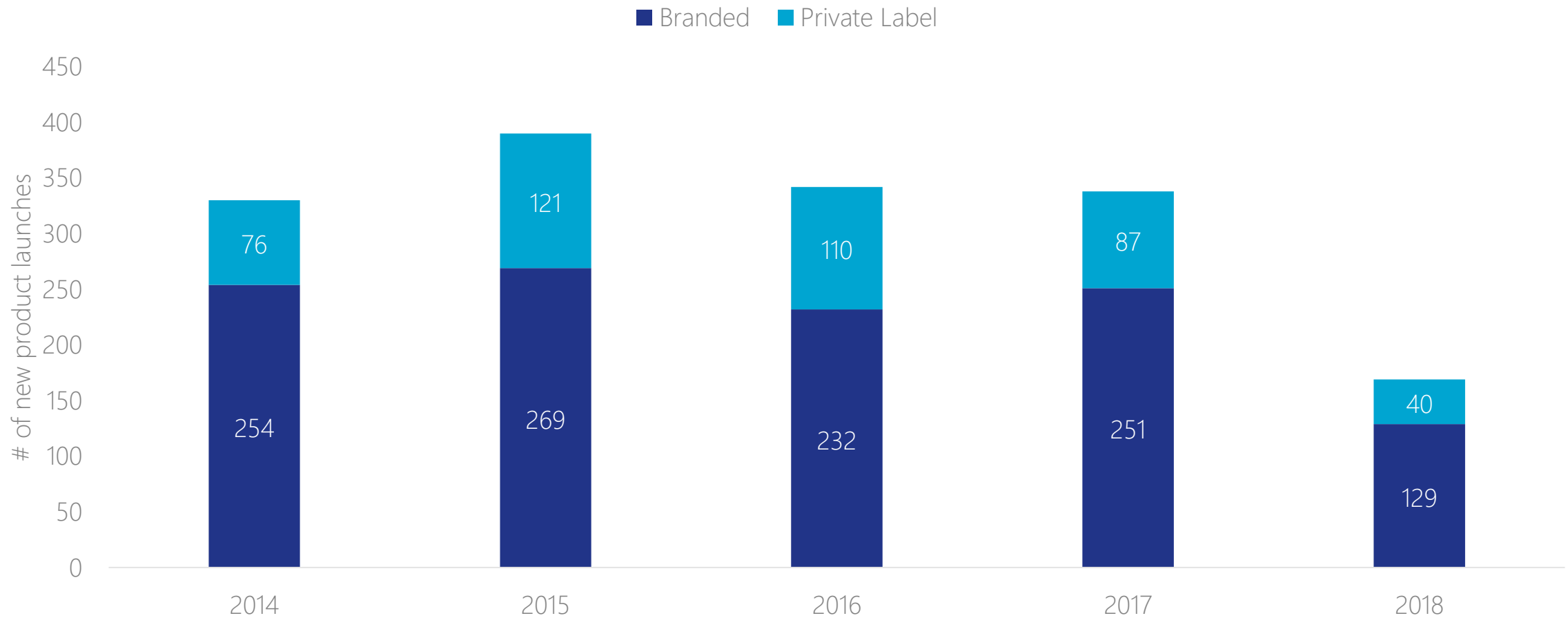
Share of branded and private label as percentage (%) of new cakes – pastries & sweet goods product launches tracked with traditional positioning (Europe, 2014-2018)





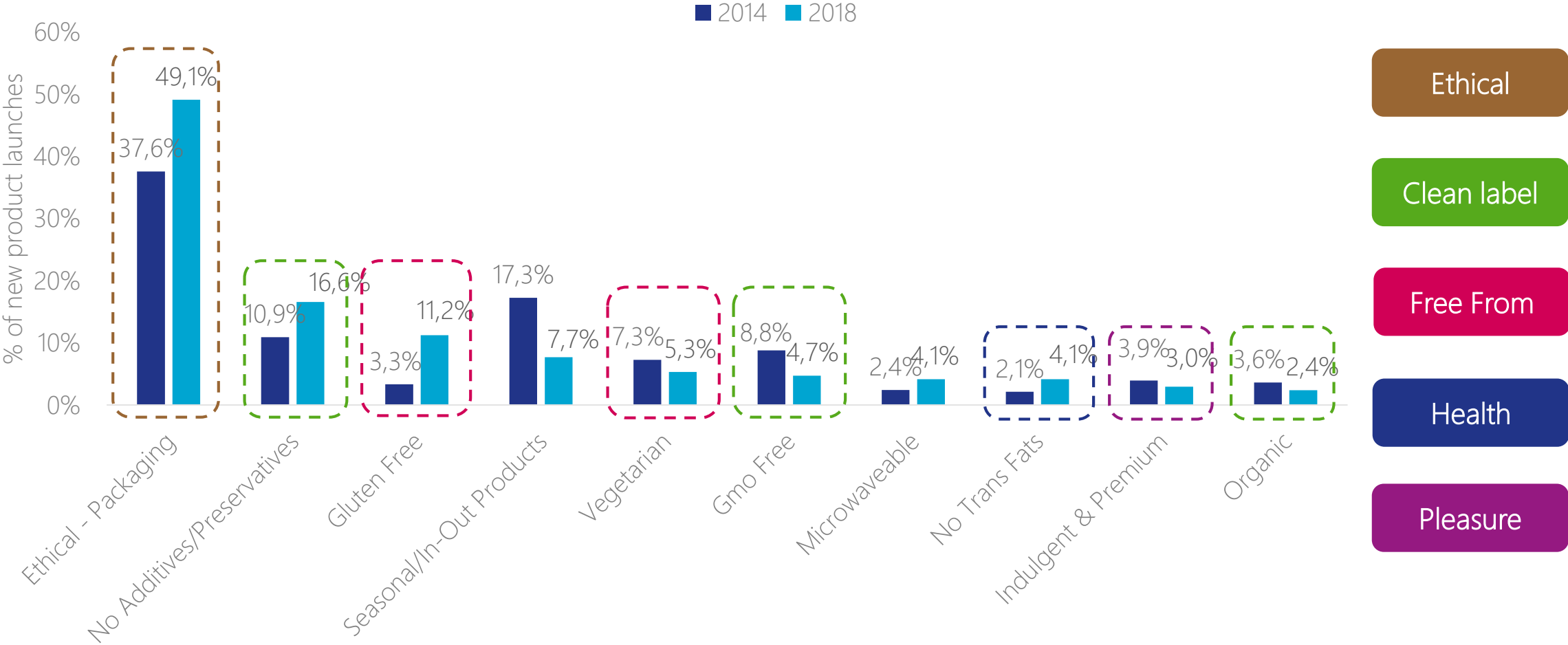
# More branded products with traditional positioning and absence of seal

Number of new cakes – pastries & sweet goods products with traditional positioning branded and private label (Europe, 2014-2018)



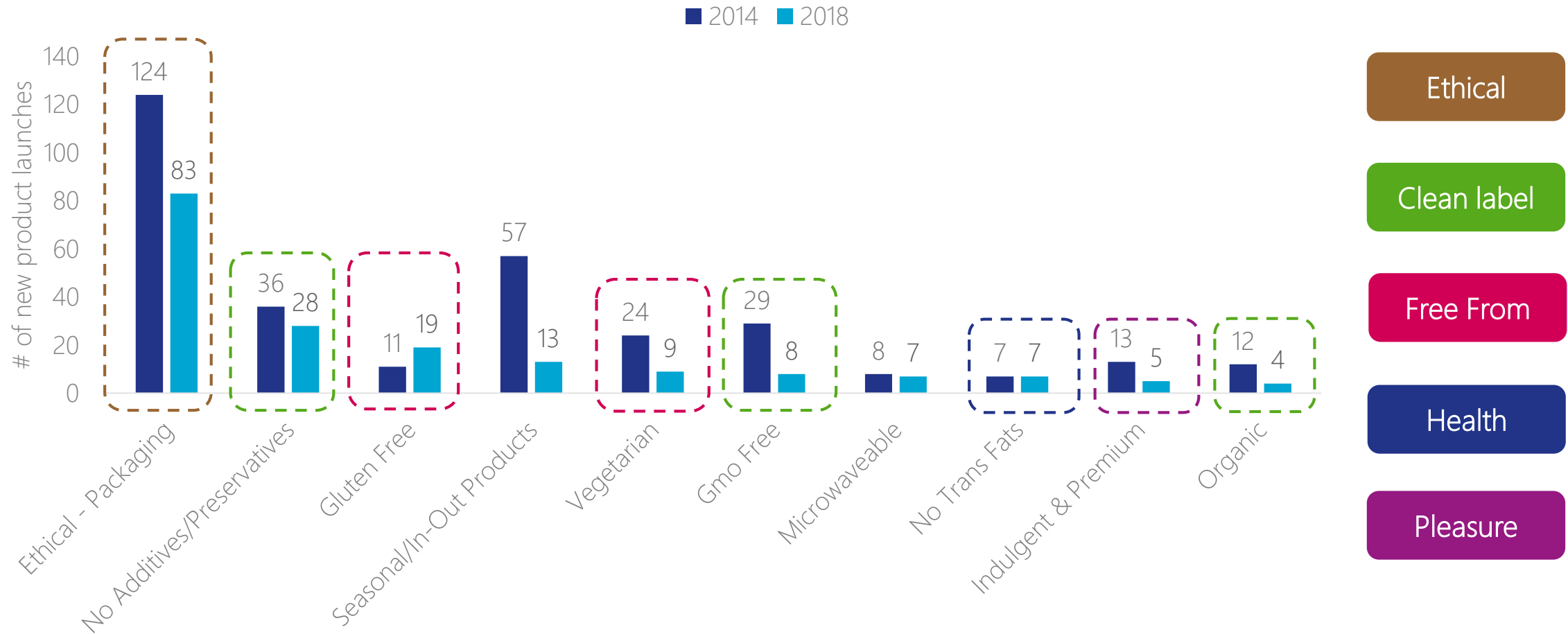
# Ethical claims on top of pastries & sweet goods with traditional positioning

Top positionings as percentage (%) of cakes – pastries & sweet goods new product launches tracked with traditional positioning (Europe, 2018 vs. 2014)



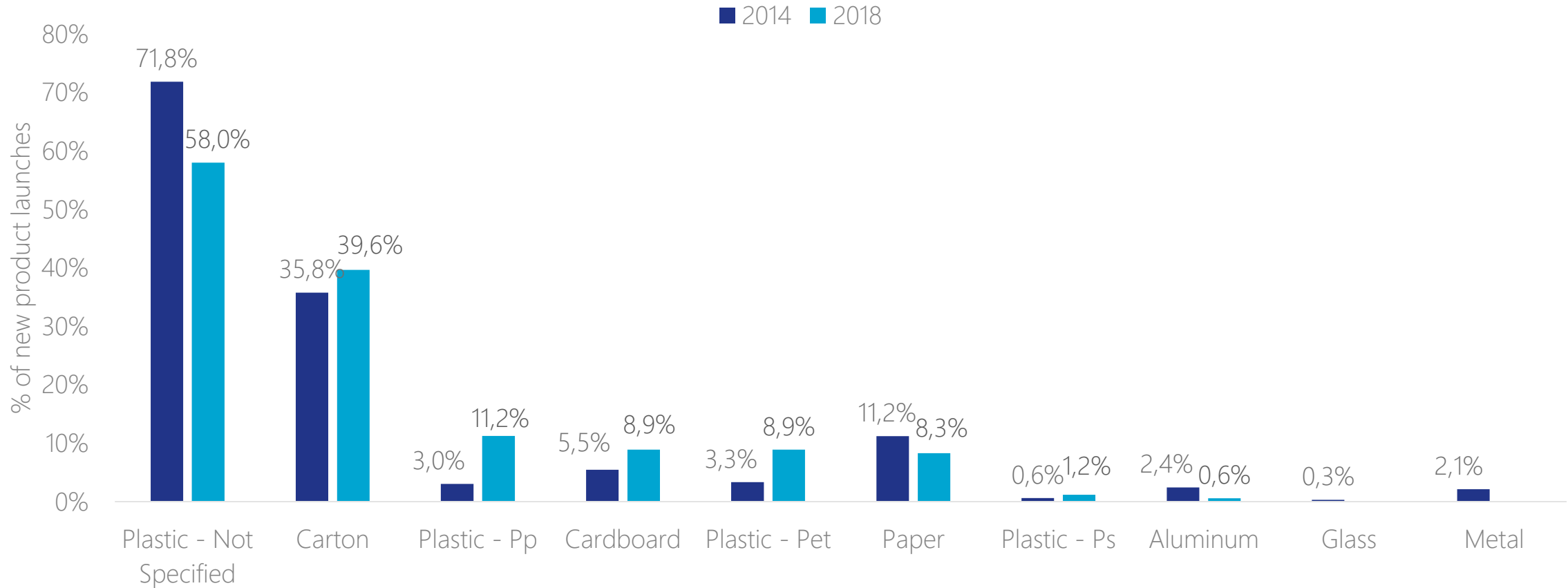
# Ethical claims on top of pastries & sweet goods with traditional positioning

Number of new cakes – pastries & sweet goods products with traditional positioning launches tracked per positioning (Europe, 2018 vs. 2014)



# Plastic remains the main packaging material in pastries & sweet pastries

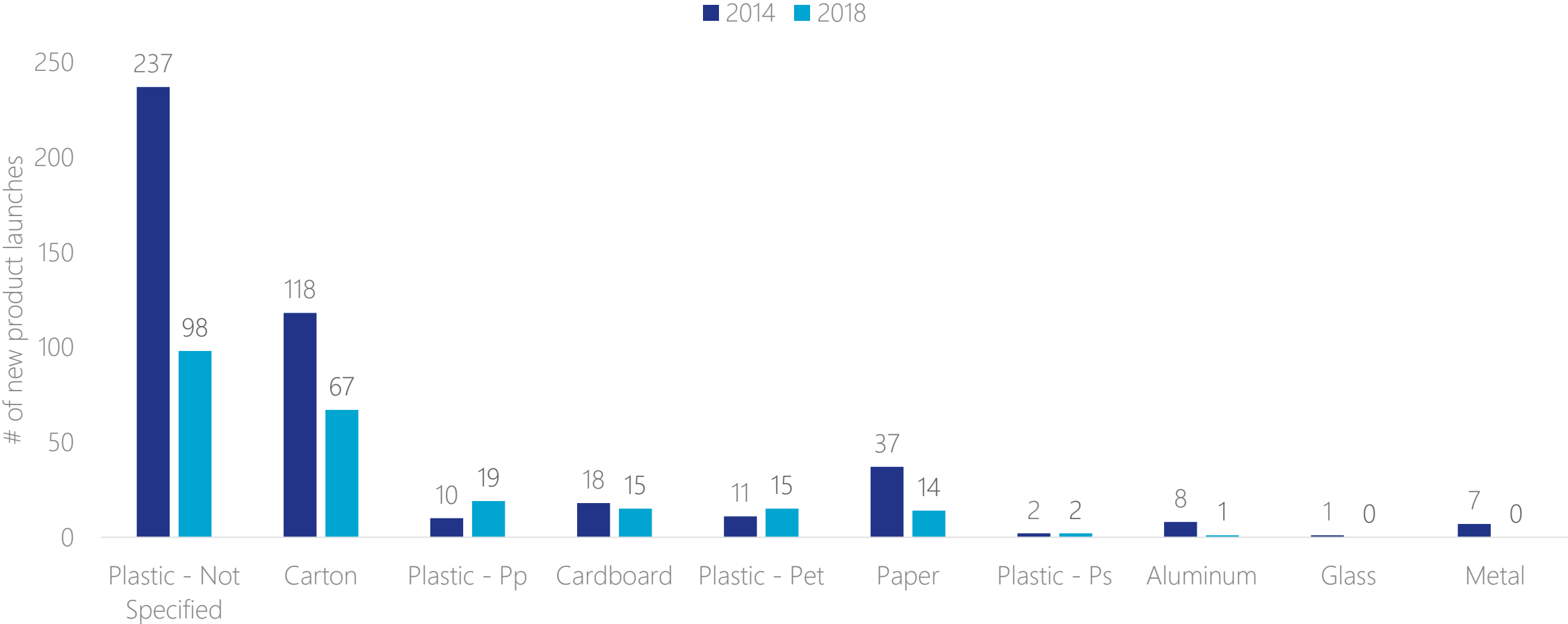
Packaging material as percentage (%) of cakes – pastries & sweet goods new product launches tracked with traditional positioning (Europe, 2018 vs. 2014)





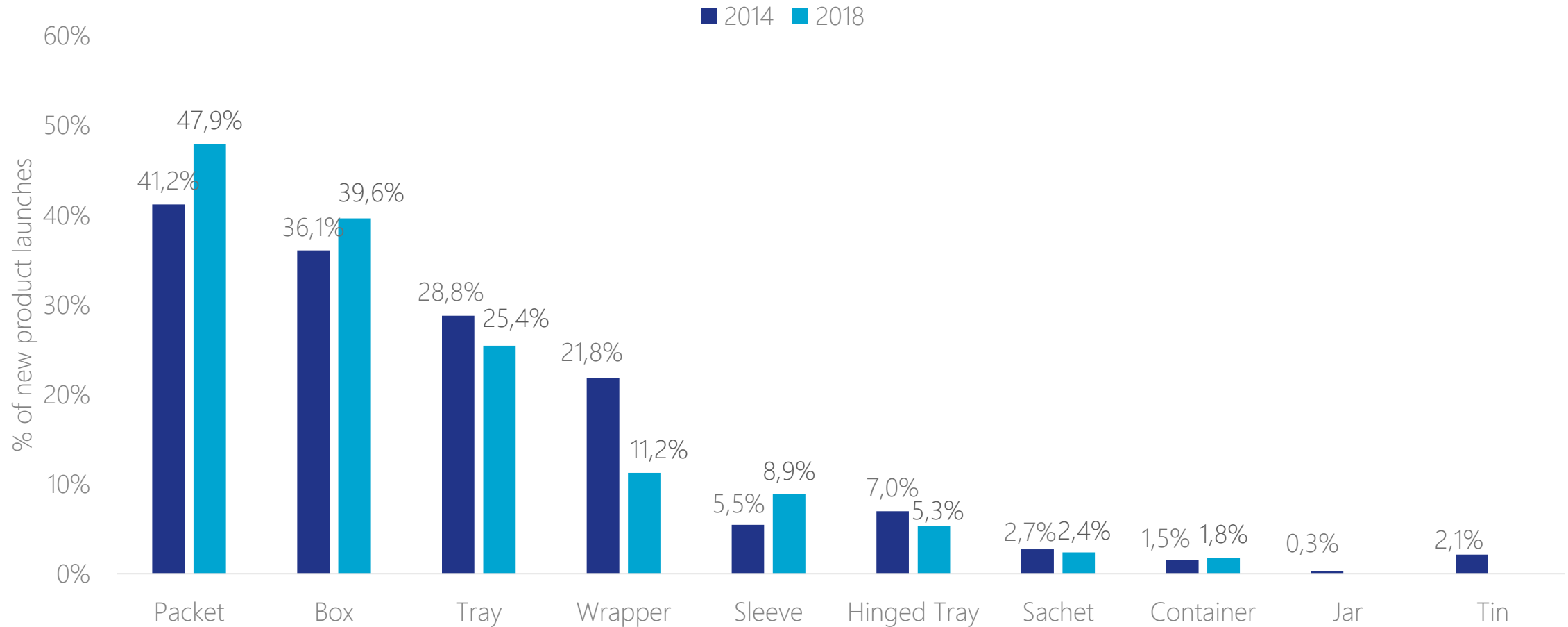
# Plastic remains the main packaging material in pastries & sweet pastries

Number of new cakes – pastries & sweet goods products with traditional positioning launches tracked per packaging material (Europe, 2018 vs. 2014)



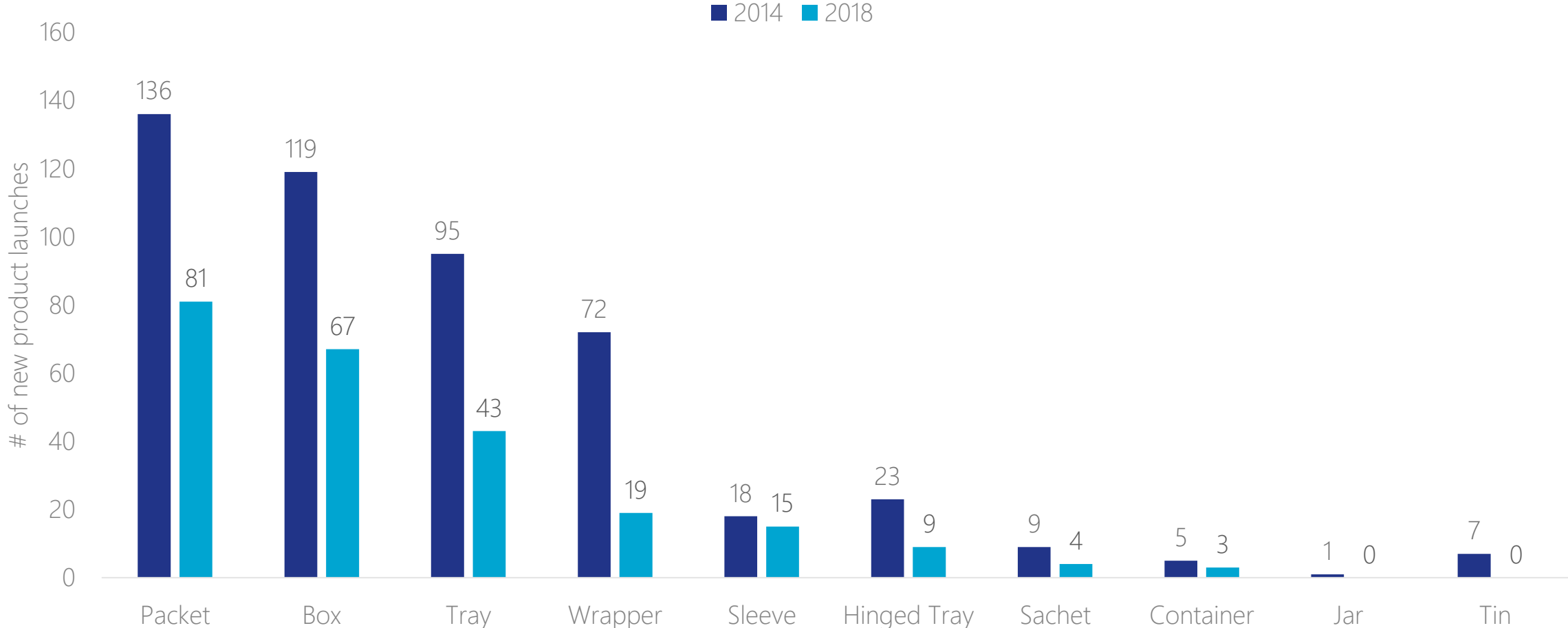
# Packet leads cakes – pastries & sweet goods packaging

Packaging type as percentage (%) of cakes – pastries & sweet goods new product launches tracked with traditional positioning (Europe, 2018 vs. 2014)



# Packet leads cakes – pastries & sweet goods packaging

Number of new cakes – pastries & sweet goods products with traditional positioning launches tracked per packaging type (Europe, 2018 vs. 2014)





# Innovation Opportunities in Cakes – Pastries & Sweet Goods with Traditional/Origin Seal - Europe



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# Spotlight on ethical claims: animal, human and packaging

## ANIMAL



**Pasticceria Del Centro Colomba Con Crema Al Cioccolato Ricoperta Al Cioccolato: Cake With Chocolate Cream Filling And Coating**

Italy, Apr 2019

CLAIMS **With free-range hen eggs.** UTZ certified cocoa. Recyclable packaging.

## HUMAN



**Lambertz Gingerbread: Gingerbread In Chocolate**

Russia, Jan 2019

CLAIMS **Fairtrade cocoa program.** 17% of chocolate. Recyclable packaging. EAC certified.

## PACKAGING



**Voor Dag En Dauw Biologisch Cranberry Amandel Spelt Cake: Organic Cranberry Almond Spelt Cake**

Netherlands, Mar 2019

CLAIMS Sweetened with syrups. **Plastic free.** Suitable for vegan. Certified organic. EKO Certified.

# Well-established traditional claims in products without origin seal



## Tresors Gourmands La Gaufre Du Nord Fourree Vanille: Waffle Filled With Vanilla Icing

France, Mar 2019

CLAIMS Made with milk and whole eggs.  
**Traditional recipe.** Ideal taste. No artificial coloring. Palm oil free. Green Dot Certified.



## Vondelmolen Honingkoek: Honey Cake

Belgium, Apr 2019

CLAIMS With 10% honey. **Belgian tradition since 1867.** Green Dot Certified.



## Joselim Sobaos Cake

Spain, Mar 2019

CLAIMS **Traditional elaboration.** 1st prize excellence for innovation for rural women. Green Dot Certified.



# Importance of family tradition in artisanal cakes – pastries & sweet goods



## Lottie Shaws Seriously Good Yorkshire Parkin

United Kingdom, Apr 2019

CLAIMS **Baked to a traditional family recipe that has been passed down through the generations.**



## Chrisanthidis Delights Handmade Kourabie Nea Karvali With Whole Almonds

Greece, Jan 2019

DESCRIPTION Handmade kourabie nea karvali with whole almonds, in a carton box. A traditional Chrisanthidis **delight that hides a "family secret". It's the simplicity of combining pure ingredients to make a family recipe that has been passed down from generation to generation...**



## Tesco Finest Sweet Snacking Selection All Butter Caramel Twist And Cinnamon Stick Biscuits

United Kingdom, Dec 2018

CLAIMS Christmas edition. Discovering wondrous festive tastes. Premium. Suitable for vegetarians. Recyclable packaging. **Baked for Tesco by a third generation family-owned Dutch bakery, using a special dough made to artisan methods since 1922.**

# Free from claims find more shelf space

VEGAN / VEGETARIAN

GLUTEN FREE

LACTOSE FREE



## Terra Sana Naturally Sweet Banana Walnut Vegan Cake

Netherlands, Jan 2019

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

## Regain Mini Cakes Fourrés Fraise: Strawberry Filled Mini Cakes

Belgium, May 2019

CLAIMS **Gluten free**. Recyclable packaging.

## Elonen Laskiaispulla Kinuskitaytteellä: Sweet Buns With Caramel Filling

Finland, Apr 2019

CLAIMS **Lactose free**. Recyclable packaging.



# Clean label claims on the rise in cakes – pastries & sweet goods

## ORGANIC



### St Michel Madeleines Pepites Chocolat Bio: Organic Madeleines With Chocolate Chips

France, Mar 2019

CLAIMS **Certified organic**. Palm oil free. Family biscuits since 1905.

## GMO FREE



### Santangelo Mini Panettone Gocce Di Cioccolato Dark: Mini Panettone With Dark Chocolate Chips

Romania, Apr 2019

CLAIMS Traditional Italian cake. No hydrogenated fat. **GMO free**. Recyclable packaging. Green Dot Certified.

## NO ADDITIVES / PRESERVATIVES



### Kinder Colazione Più Con Farina Integrale: Leavened Yeast Milk Cake With Wholemeal Flour

Italy, Apr 2019

CLAIMS New recipe. Made with milk, malt and 5 cereals. Tasty by nature. Naturally leavened. Fiber source. Recyclable packaging. **No added preservatives and colorings**. No hydrogenated fats. GMO free.

# Arousing consumer curiosity by including an element of surprise



## Tesco Slime Surprise Cake

United Kingdom, Apr 2019

DESCRIPTION Sponge cake filled with buttercream, raspberry jam and jelly sweets, covered with soft icing and finished with edible decorations. **Hidden jelly sweets** filled with buttercream, fruity jam and jelly sweets, covered with icing.



## Picard Only Love 8 Mini Eclairs Sales: 8 Salted Mini Eclairs

France, Jan 2019

DESCRIPTION **Discover these two flavors** of block of duck foie gras and raspberry icing, as well as fresh cheese and semi-dried tomatoes for an aperitif that promises to be full of surprises.



## Maheso Experience Gina La Croqueta De Gintonic Un Toque De Limon Tonica: Exotic Croquette With Gin And Tonic

Spain, Feb 2019

TRENDSPOTTING INSIGHT: Croquette **plays with expectations in a blue version with gin and tonic cocktail flavor.**



# Spotlight on premium and seasonal/in-out claims

## EASTER



### Velykodniy Keks Tvorozhny Easter Cake With Cottage Cheese

Ukraine, Apr 2019

CLAIMS **Easter edition.**

## VALENTINE'S DAY



### Tesco 2 Valentine's Chocolate Cake Cubes

United Kingdom, Feb 2019

CLAIMS **Valentine's day edition.** Hand-decorated. Suitable for vegetarians. No artificial flavors or colors. Recyclable packaging.

## CHRISTMAS



### Amandelkrans Met Roomboter En Amandelspus: Almond Wreath With Butter And Almond Paste

Netherlands, Jan 2019

CLAIMS **Christmas edition.**

# A touch of indulgence with alcoholic flavors

## BAYLEY'S



**Baileys Lava Cakes Flavoured With Baileys**

Belgium, Mar 2019

## RUM



**Baci Del Roero, Dolce A Forma Di Rosa Dal Cuore Di Cioccolato Aromatizzato Al Rhum: Chocolate Rum Flavored Sweet Pastry**

Italy, Feb 2019

## EGG LIQUOR



**Pure Luxe Prestige Sneeuwster Met Advocaatvulling: Snow Star Shaped Cake With Egg Liquor Filling**

Netherlands, Jan 2019



# Floral flavors blossom in cakes – pastries & sweet goods

ROSE



Staburadze Zagarini Saldie Rozu: Sweet **Rose** Twig Pastry Biscuits

Latvia, Mar 2019

ELDERFLOWER



Mr Kipling 6 Lemonade And **Elderflower** Slices

United Kingdom, Feb 2019

LAVENDER



Ah Lavendel Zwarte Peper Stroopwafel: **Lavender** And Black Pepper Waffle

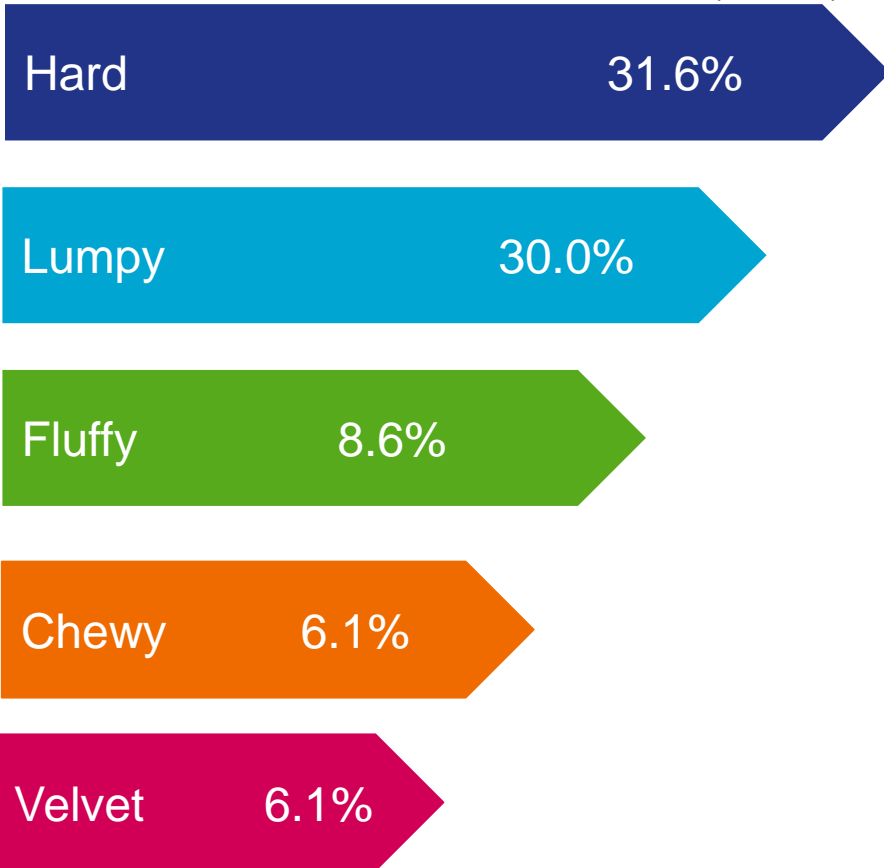
Belgium, Sep 2018



# Highlight on cakes – pastries & sweet goods texture

Fastest growing textures tracked in new cakes – pastries & sweet goods launches (Global, CAGR 2014-2018)

CAGR ('14-'18)



**Jumbo Amandel Schuim Vlaai Half: Half Almond Foam Pie**

Netherlands, Jan 2019

DESCRIPTION **Hard** scrub base filled with almond bavarois and a foam slice with amaretto flavor...



**Milka Fluffy Sponge Cake With Alpine Milk Chocolate Pieces (12%) With A Touch Of (21%) Cocoa Flavor**

France, Apr 2019



# Key learnings & What's next ?



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# Key learnings & What's next ?

## Traditional and limited edition options feature

Traditional positioning continue to be popular for NPD, reflecting interest in homemade-style, craft and artisan options, as well as the ongoing interest in traditional products, such as waffles, pound cake, panettone, etc. Linked to this, family traditions that are passed through generations are also used to add value, conveying an exclusive image for traditional products.

## Targeting the adventurous consumer

Consumers are moving out of their comfort zones to explore bolder flavors. There are opportunities for traditional products to add an element of the unexpected through the adoption of new flavors, a surprise in the product and exclusive elements that create differentiation in the market.

## Finding the balance between health and indulgence is key

While some companies are building healthy foundations by incorporating vegetables, increasing protein, and removing sugar, they have to satisfy the consumer's sweet tooth. Ultimately, consumers choose cakes and pastries for dessert satisfaction. That is unlikely to waver no matter how healthful their overall food choices. In this context, indulgent flavors will continue to be on top of these products that can also incorporate additional health benefits.

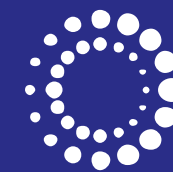
## Ethical positioning on the rise

Animal welfare in animal-based ingredients – e.g. free range eggs, lower environmental impact, social responsibility – e.g. fairtrade cocoa, and sustainable packaging are not a niche anymore, these practices are increasingly demanded by the consumer that looks for an overall ethical product.





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