

An invitation to Founder Clients to subscribe to the new study

Soft buns – Flatbreads - Doughnuts – US pastries

The future of the most dynamic bakery segments

2011 – 2016/17 - 2022

Fresh & Packaged – Industrial & Artisanal
Markets & Drivers – Players

Germany, France, United Kingdom, Poland, Spain, Italy

A proposal for a multiclient study for:

- Industrial Bakers
- Millers and Bakery Ingredients Manufacturers
- Wholesalers and Importers in the Bakery Chain
- Modern and Specialist Retailers
- Equipment and Machinery Suppliers
- Banks and Investment Funds



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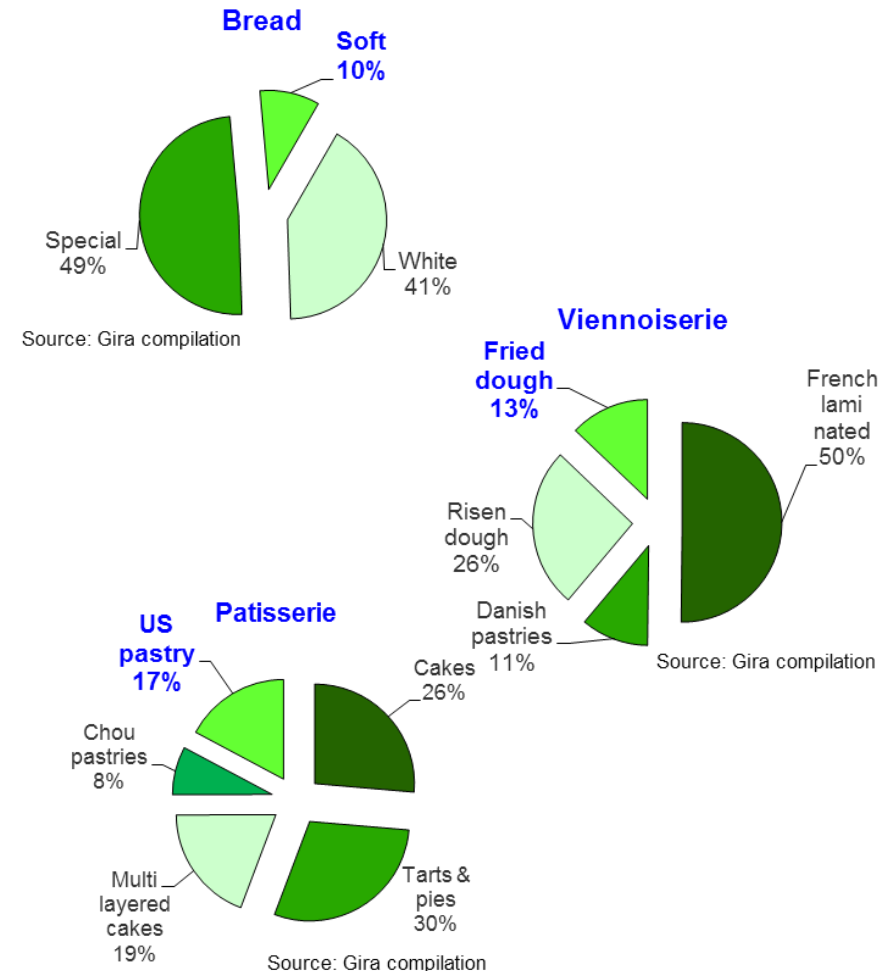
Gira has been analysing the European bakery markets for over 15 years, covering 4 bakery products categories: bread, viennoiserie, patisserie and savoury pastry snacks.

Within this mature markets, some specific segments are showing rather promising growth rates and are increasingly of interest for consumers - and therefore for all players along the chain.

A focus on these segments is needed to understand the drivers behind :

- Their relative share within their bakery category and their foreseen growth – *Will they move into the mainstream?*
- The consumption trendsetters – *What makes them popular among consumers?*
- Their specific distribution structure – *Will bakery and coffee chains continue to be the driving force behind market growth?*
- Production strategy options and challenges for manufacturers – *In-store vs bake-off – Future production capacities and facilities.*

Fresh bakery product consumption breakdown, 2016



The consumers are thinking outside the traditional bakery products boxes.

Now there is a need for a further screening of some of the fast growing categories within each bakery products family.

Gira will provide full data on these categories, covering consumer markets, distribution structure and supply strategies,

- ❑ **Product segmentations:**
 - Main recipes, flavours, fillings or toppings – Colours – Sweet vs savoury – Soft vs crust etc.
 - Formats (individual & mini)
 - Competitive landscape (e.g. bagels vs buns)
 - The wide variety of flatbreads
- ❑ **Main consumption occasions:**
 - Snacks and sandwiches – Lunch – Breakfast – Special occasions
- ❑ **Consumption trends:**
 - Health trends (e.g. low trans-fats donuts, whole wheat) vs indulgence
 - Impact of "on-the-go" consumption
 - Impact of international and ethnic foods
- ❑ **Distribution structure:**
 - Retail versus foodservice
 - Impact of the success of chained operators on the markets development
 - Main chained operators
- ❑ **Technologies and production options:**
 - Frontier and competition between packaged and fresh products
 - Handmade or baked-off?
- ❑ **Main industrial producers (packaged and bake-off):**
 - Ranking of the main producers (by technology)
 - Specialised vs. "global"
 - Manufacturing (plants) strategies (e.g. linked to the geographical situation of the biggest markets)
- ❑ **Upgrading and premiumisation:**
 - Branding as an added value
 - Innovation.

As for all its researches on European bakery markets, Gira will use the same products definitions, in order to allow international comparison.

Gira's bakery products segments

- ✔ **Soft buns:**
 - Hamburger buns, hot-dog buns
 - Bagels
- ✔ **Flat breads and ethnic breads:**
 - Naan, chapatti
 - Pita, tortilla wraps
- ✔ **Doughnuts (deep fried pastries):**
 - Ring doughnuts
 - Plain doughnuts / Berliners
 - Others (churros, beignets etc.)
- ✔ **US pastries:**
 - Muffins, brownies
 - Cheesecakes and alike
 - Wet cookies.

Consumer products categories *(at consumer level)*

- ✔ **Fresh products** (un-packaged or packaged at the point of sales)
- ✔ **Packaged ambient products**
- ✔ **Packaged products to bake at home** (chilled/frozen/ambient).

Distribution channels

- ✔ **Retail**
 - Artisan bakers, confectioners
 - Modern retailers: hyper- & supermarkets, hard discount
 - Others: small grocery stores, petrol stations and c-stores
- ✔ **Foodservice**
 - Social foodservice: education, health/welfare, workplace
 - Commercial restaurants and hotels (HoReCa), fast-food
 - Bakery and sandwich chains.

Production methods

- ✔ **Artisanal production:** scratch baking at the point of sales
 - Artisan bakers & Modern retail in-store scratch baking
- ✔ **Industrial production:**
 - B2C - Packaged ambient and to bake at home
 - B2B - Fresh finished products: daily delivered
 - B2B - Bake-off products: semi-finished products, to be baked at the point of sales and sold as fresh.
 - Ready to prove
 - Ready to bake
 - Fully-baked.

Countries

- ✔ **Germany, France, United Kingdom, Poland, Italy, Spain**

Time horizon

- ✔ **2011, 2016/17**
- ✔ **2022 trends.**

Synthesis (*by product*)

1. Market dynamics and drivers:
 - Main markets
 - Consumption and distribution emerging trends
2. Supply structure:
 - Prospects by technology (packaged, scratch, bake-off)
3. Top industrial producers:
 - Ranking, products portfolio, strategies
4. Conclusions and recommendations:
 - Market drivers & brakes, opportunities & threats
 - Competitive landscape and success strategies for operators in the supply chain (distribution channels, industrial manufacturers)

Country Reports (40 pages each)

By product:

1. Product definitions and segmentation
2. Consumption dynamics:
 - Markets quantification and trends – fresh & packaged products
 - NPD
3. Distribution structure:
 - Retail vs foodservice
 - Main market players
4. Supply strategies and production structure for fresh products:
 - Share of bake-off and bake-off technologies
5. The main industrial bakers:
 - Packaged and bake-off products

TIMING

Delivery will be 4 months after the announcement of formal go-ahead for the research. Aim is for completion [February 2018](#).

SUBSCRIPTION PRICE

The full subscription price is Euros **14'500** (before any applicable taxes).

Subscription options are available by product:

- 1 product: Euros 5'500
- 2 products: Euros 9'900
- 3 products: Euros 12'900.

REPORTS

The reports will be in [English](#).

Clients will receive an electronic version of the reports in searchable and printable [PDF](#) format.

Hard copies are available at an additional cost of Euros 400 per copy.

FOLLOW UP

With the full subscription option, Gira will be pleased to make a tailored, half-day presentation/workshop of the findings and conclusions of the Study for clients in their offices in Europe (only travel expenses to the client's office rebilled at cost).