



# Dynamic Bakery Segments

Country Markets and Trends for:

***Soft buns - Flatbreads - Doughnuts - US Pastries***

France - Germany - Italy - Poland - Spain - United Kingdom

2<sup>nd</sup> Edition published in November 2023

## Contacts

Anne Fremaux (Bakery Director) [a.fremaux@girafood.com](mailto:a.fremaux@girafood.com)  
Ségolène Foissac (Consultant - Bakery) [sfoissac@girafood.com](mailto:sfoissac@girafood.com)

## Scope

### Products

**Soft buns, flatbreads, doughnuts, US pastries:** unpackaged and packaged; storage forms (fresh, ambient, chilled, frozen); production methods (from scratch artisanal/in-store; industrial fresh, bake-off and packaged).

### Markets

**All distribution channels:** modern and traditional retail, foodservice and bakery chains.

### Countries

**6 countries:** France - Germany - Italy - Poland - Spain - United Kingdom.

### Timeline

2012 - 2017 - 2022 data - 2027 forecast.

## What you get

### Webinar

◆ **Publication webinar** highlighting the key research conclusions and insights from the study.  
Enables clients to maximise value from the research and disseminates insights to key staff.

### Synthesis Report (127 pgs)

◆ **A unique and comprehensive overview of Dynamic Bakery segment markets and players.**  
Highlights: market figures and trends, future drivers, brakes and opportunities per Dynamic Bakery segment.  
A synthesis for each of the four Dynamic Bakery segments: consumption, distribution channels, supply structure and bake-off markets, industrial production and main industrial players.

### Country Reports (60 pgs/country)

◆ **The description of the Dynamic Bakery segment markets and industry structures in six countries.**  
Highlights: country market figures and trends, future drivers, brakes and opportunities per Dynamic Bakery segment.  
Background: key structural and consumption trends, detailed analysis of distribution channels (and especially hamburger fast-food, kebab, Tex-Mex, coffee-shop, bakery, sandwich, doughnut and US pastry chains).  
For each of the four Dynamic Bakery segments:

- Consumption dynamics, detailed description and segmentation of fresh and packaged product recipes, formats, packaging, brands, new product developments and claims.
- Distribution channels for fresh and packaged products.
- Supply structure, artisanal vs. industrial production; the market, technologies and outlets for bake-off products; industrial production and ranking of the top industrial producers.

## Reports and Cost

### Report

Electronic, printable and searchable PDF files. Reports are published in English.

### Cost

**EUR 14,500** (before any applicable tax) for the full report. Options are available on page 11.

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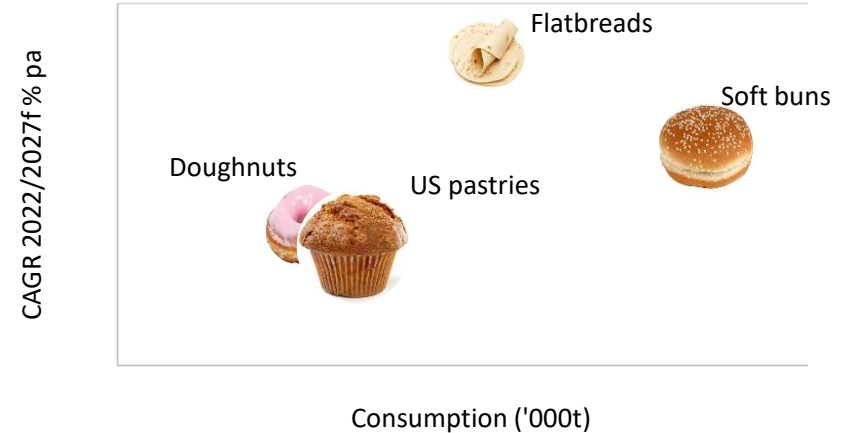
Within the mature European bakery market, four Dynamic Bakery product segments are showing rather promising growth rates and are of increasing interest to all players along the bakery chain.

- This 2<sup>nd</sup> edition of “Dynamic Bakery Segments” updates data from the 1<sup>st</sup> edition in 2018; a market assessed at **almost 3 mio tons in 2022, i.e. 12% of the total bakery market** in the six countries covered - **up to over 20% by value!**
- As in 2018, research covered the six main European countries, accounting for over 65% of the total market for Dynamic Bakery segments in Europe.

Following the Covid pandemic, and its implications on consumption habits and distribution channels, a new focus on these Dynamic Bakery segments was needed to better understand:

- **Their relative share within their bakery category and their foreseen growth** - Will they move into the mainstream? Which products are driving the market?
- **The consumption trendsetters** - What makes them popular among consumers? Is premiumisation still a key driver?
- **Their specific distribution structure** - Will bakery, coffee-shop or fast-food chains continue to be the driving force behind market growth?
- **Production strategy options and challenges for manufacturers** - Packaged vs. fresh in-store vs. bake-off - Bake-off market and outlets for each dynamic bakery segment - Industry concentration and main players.

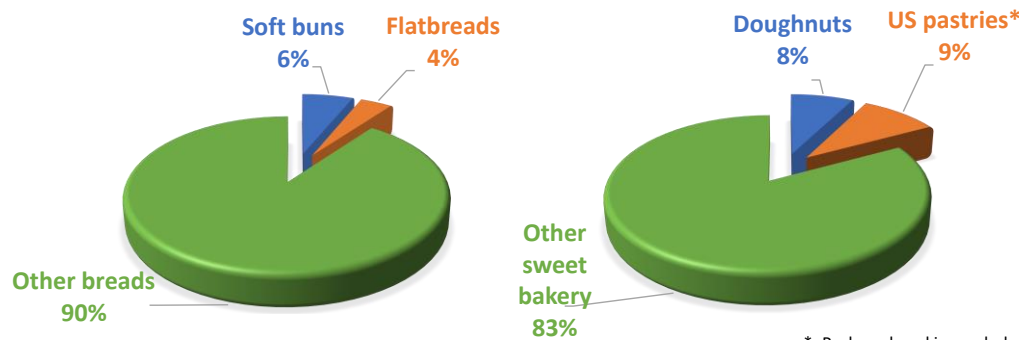
### Dynamic Bakery segments: markets and trends by segment and by country, 2022/2027f



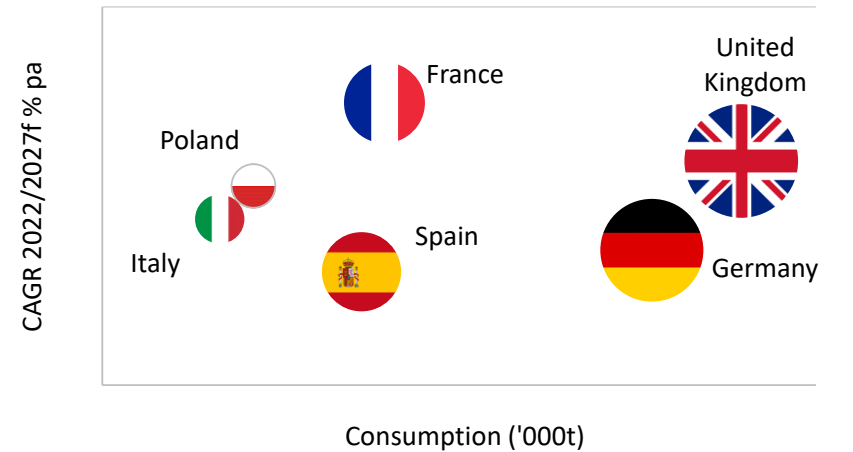
Source: Gira

Size of bubbles denotes values in EUR mio

### Share of Dynamic Bakery segments within bread and sweet bakery in 2022 (% volume)



\*: Packaged cookies excluded



Source: Gira

Size of bubbles denotes values in EUR mio

#### Market figures:

- Volume (tons, # units) and value.
- Past and future trends.

#### Product segmentation:

- Fresh vs. packaged (ambient, chilled, frozen).
- Main sub-segments and recipes for each Dynamic Bakery segment.
- Successful flours, ingredients, flavours, fillings and toppings.
- Formats (to share, individual, mini) and packaging.
- Price positioning.
- Branding and the importance of licences.
- Main claims.

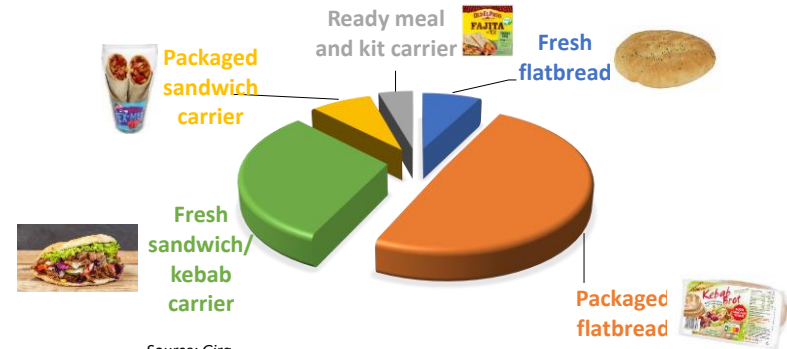
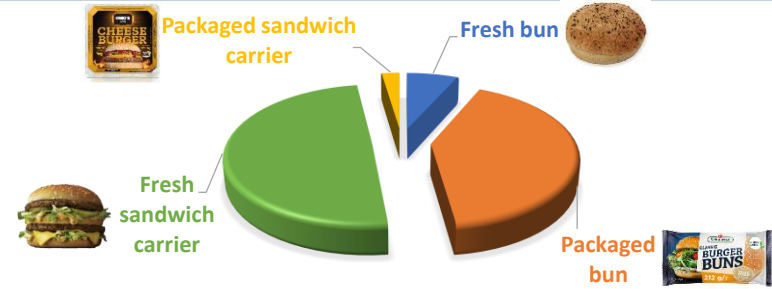
#### Main consumption occasions:

- Snacks and sandwiches - Lunch - Breakfast - Special occasions.
- Soft bun and flatbread purchase type: as a sandwich/ready-meal carrier or as bread.

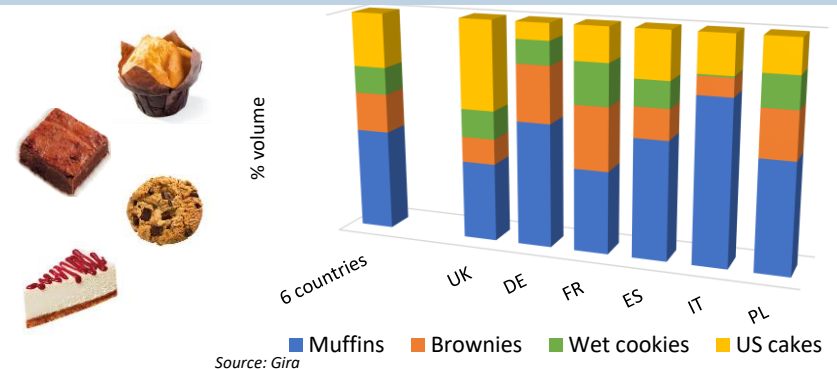
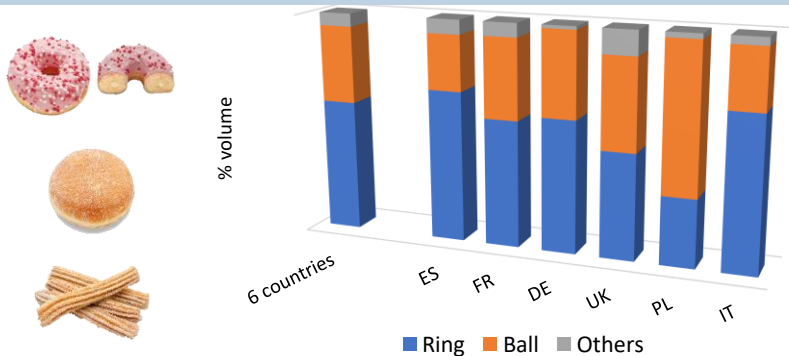
#### Consumption trends, key demand drivers and brakes:

- Health concerns: sugar and fat, gluten-free, lactose-free, proteins, fibres etc.
- Sustainability: vegan/vegetarian, organic, clean label, palm oil-free, local etc.
- Impact of "on-the-go" consumption, ethnic cuisines, US trends etc.
- Premiumisation vs. basic, impact of cost-of-living crisis.
- New product development.
- Competing products.

#### Soft bun and flatbread purchases by type in 2022 (total for six countries)



#### Doughnut and US pastry consumption: by main recipe and by country in 2022



### Distribution structure:

- Retail share vs. foodservice.
- Impact of the success of *chained operators* on market developments, e.g.:
  - Soft buns: share of fast-food chains against table restaurants.
  - Flatbreads: focus on the fresh kebab/take-away and Tex-Mex chains.
  - Doughnuts: relative presence of doughnut chains in each country.
  - US/American pastries: coffee-shop chains facing competition from bakery or specialised chains.
- Focus on the main foodservice chains specialised in each type of Dynamic Bakery segment:
  - Structural trends and specificities by country.
  - Offer of Dynamic bakery products.

### Technologies and production options:

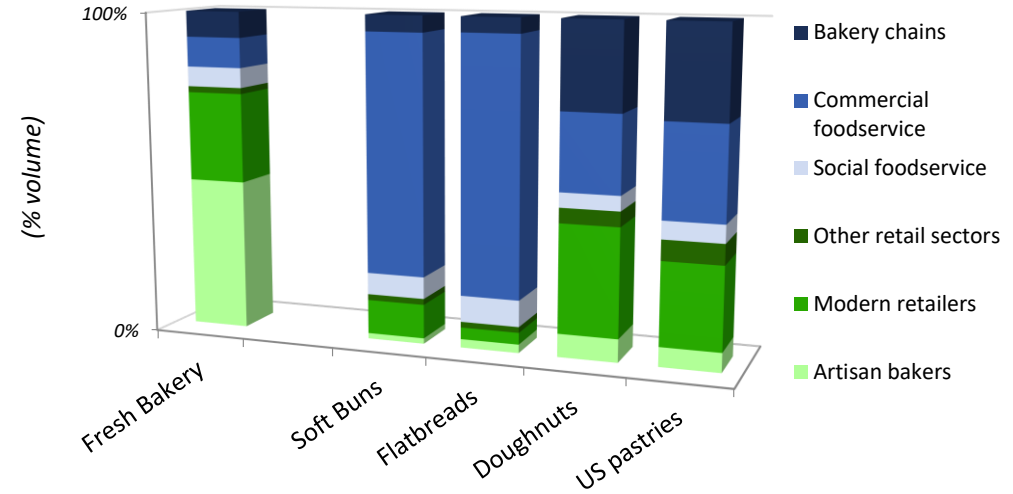
- Fresh Dynamic Bakery segment supply options by channel:
  - Impact of "hand-made" or "artisanal".
  - Use of fresh industrial deliveries.
  - Further development of bake-off.
- Total supply structure: share of artisanal vs. industrial supplies.
- The market for bake-off products: by technology, by recipe and by channel.

### Key industrial producers (packaged B2C, fresh B2B and bake-off B2B products):

- Typology and ranking of the main industrial producers.
- Their presence in the different Dynamic Bakery segments.
- Their positioning by technology: packaged, fresh and bake-off.
- Future challenges.

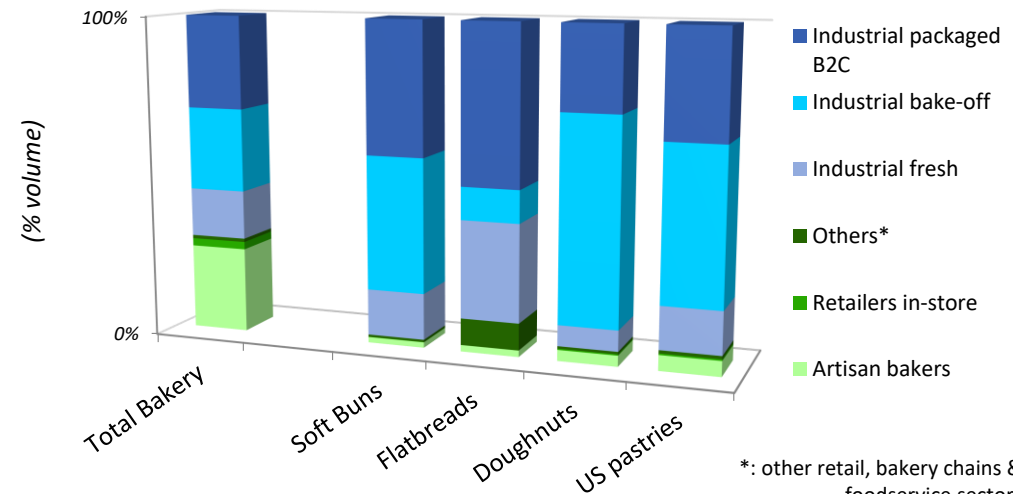


Fresh Dynamic Bakery segment distribution structure compared to total fresh bakery, 2022



Source: Gira

Total Dynamic Bakery segment supply structure compared to total bakery, 2022



\*: other retail, bakery chains & foodservice sectors

Source: Gira

Since the beginning of Gira's research into the European bakery markets, *Gira has been using the same product categories and distribution channels in each country*, in order to standardise product definitions and thus enable international comparison.

### Dynamic Bakery segment categories and recipes

#### Soft buns:

- Burger buns
- Hot-dog buns
- Bagels
- Other buns



#### Flatbreads:

- Naan, chapati, roti
- Pita
- Lavash
- Tortilla, wrap
- Piadina
- Other flatbreads



#### Fried Doughnuts:

- Ring
- Ball
- Other doughnuts



#### US sweet pastries:

- Muffins / Cupcakes
- Brownies
- Soft cookies
- US cakes.



*In each Country Report, photos of the main products in each category are provided.*

### Country coverage

The study covers all aspects of the bakery chain - consumption, distribution, production, etc. in six key European countries:

- ✓ France
- ✓ Germany
- ✓ Italy
- ✓ Spain
- ✓ Poland
- ✓ United Kingdom.

### Consumer product categories

At consumer level, B2C Dynamic Bakery segments products are further split into:

- ✓ **Fresh products:** presented fresh at the consumer level, usually sold at the bakery counter.
- ✓ **Packaged ambient products:** ambient branded products sold at the self-service counter.
- ✓ **Packaged products to bake:** ambient, chilled or frozen branded products to be baked/thawed at home.

### Distribution channels

#### Retail:

- Traditional retailers: artisan bakers, confectioners
- Modern retailers: hyper- and supermarkets, hard discount
- Other retail: small grocery stores, petrol stations and convenience stores

#### Foodservice:

- Commercial restaurants and hotels, fast-food, coffee-shop chains
- Social/institutional catering: education, workplace, health/welfare
- Bakery chains and sandwich chains (> 10 outlets).

### Time horizon

All market data (consumption, distribution and production) are provided for:

- ✓ Historical series: 2012, 2017
- ✓ Current situation: 2022
- ✓ 2027 forecast.

## Supply structure

Dynamic Bakery segment consumption is broken down between artisanal and industrial supply methods:

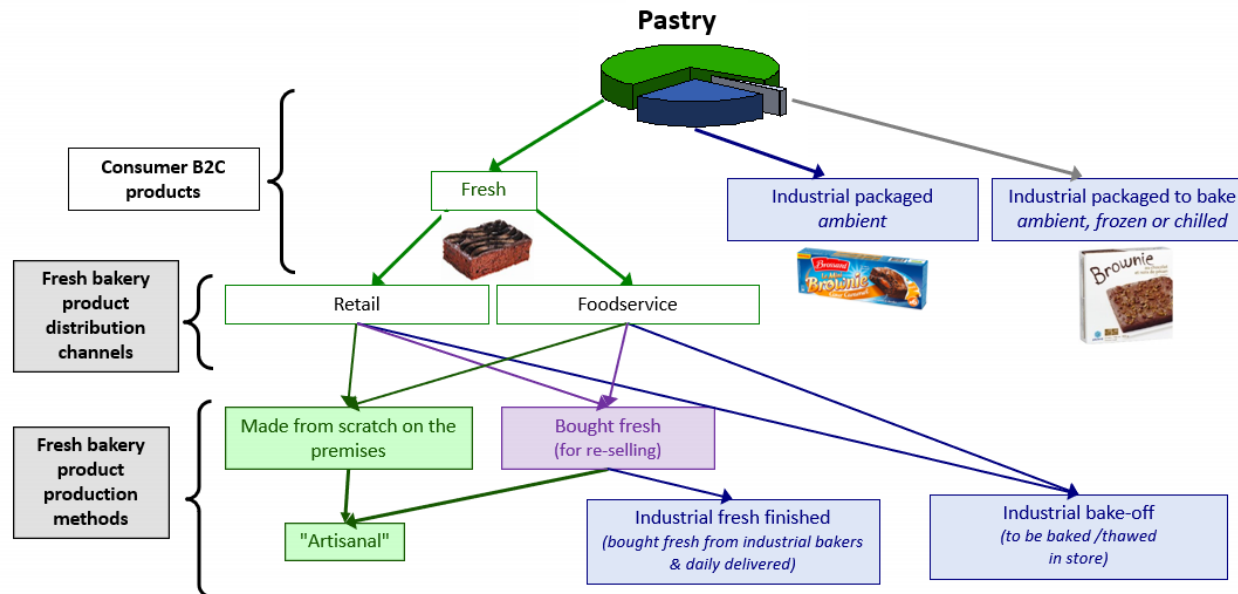
- ✔ **Artisanal supply:** scratch baking at the point of sale, with products sold directly to the consumer
  - Artisan bakers scratch baking
  - Modern retail in-store scratch baking
  - Other retail and foodservice scratch baking.
  
- ✔ **Industrial supply:**
  - B2C - Packaged ambient
  - B2C - Packaged to-bake: ambient, chilled or frozen
  - B2B - Fresh finished products: daily delivered to the stores or restaurants, to be re-sold as fresh
  - B2B - Bake-off products: semi-finished products, to be baked at the point of sale and sold as fresh.

## Industrial bakers

All types of industrial bakers producing Dynamic Bakery segments have been analysed:

- ✔ Packaged (ambient or to-bake chilled/frozen).
- ✔ Fresh.
- ✔ Bake-off.

The Synthesis also provides a **League table** of the major bakery companies, ranked by their turnover in the different Dynamic Bakery segments.





The research is documented into a PowerPoint based report, presented in two main sections:

- 1) **Country reports for the six European bakery markets covered.**
- 2) **Synthesis report.**

## Country Reports (60-70 pages per country)

Providing the strategic and competitive context for each country:

- **Dynamic Bakery segment highlights**
  - Consumption, distribution channels, supply structure and trends
  - Bake-off market for Dynamic Bakery segments
  - Industrial production and key industrial bakers
  - Drivers, brakes and opportunities for Dynamic Bakery segments
- **Country background**
  - Key structural trends
  - Distribution overview: retail and foodservice landscape
  - Main fast-food, coffee-shop, bagel, hot-dog, kebab, Tex-Mex, bakery, specialised etc. chains
- **For each Dynamic Bakery segment (soft buns, flatbreads, doughnuts, US pastries)**
  - Introduction to the market
  - Consumption dynamics
    - Overall
    - For fresh and packaged Dynamic Bakery segments: main sub-segments and recipes, formats and packaging, price positioning, brands, NPD, claims etc.
  - Distribution channels
    - For fresh and packaged Dynamic Bakery segments
  - Supply structure
    - Supply strategies by channel
    - Artisanal vs. industrial supplies
    - The market for bake-off Dynamic Bakery segments
  - Industry overview
    - Industrial production
    - Top industrial bakers by technology (fresh, bake-off, packaged).

## Synthesis Report (127 pages)

- **Dynamic Bakery segment highlights**
  - Consumption trends
  - Distribution channels
  - Supply structure and bake-off markets
  - Industrial production and League Table of industrial bakers
  - Future drivers and brakes, opportunities
- **Soft buns - Synthesis**
  - Highlights
  - Introduction to the market
  - Consumption trends: overall, by end-use and by technology, segmentation by recipe, drivers and brakes
  - Distribution channels for fresh and packaged soft buns, the importance of specialised chains
  - Supply and production structure: supply strategies by channel, artisanal vs. industrial production, bake-off market
  - Industrial production, main soft bun industrial producers
- **Flatbreads - Synthesis**
  - Same structure as outlined in 'Soft buns' above
- **Doughnuts - Synthesis**
  - Same structure as outlined in 'Soft buns' above
- **US pastries - Synthesis**
  - Same structure as outlined in 'Soft buns' above.

Gira has been researching and analysing the bakery industry since 1983, during which time Gira has built an expert understanding of the industry and key contacts within the industry, which allow Gira to deliver thoughtful insights on the 'how?' and the 'why?' of the market, alongside the 'how much?'.

We have used our tried and tested combination of **four primary research approaches** to obtain the most complete cover of the key aspects and drivers of the markets to be analysed and forecasted.

- **Internal databanks** on the bakery sector compiled from:
  - Over 40 years of research in the European bakery sectors.
  - Specific multiclient research programmes such as:
    - The previous report on "DYNAMIC BAKERY PRODUCTS", covering soft buns, flatbreads, doughnuts and US pastries and their specific retail chain network (published end-2018).
    - The 4<sup>th</sup> edition of the "BAKERY COMPANY PANORAMA" study (published November 2022).
    - The report published end-2021 on "THE DIFFERENT BUSINESS MODELS OF BAKERY CHAINS IN EUROPE".
    - The reports on "COVID-19 CRISIS – IMPACT ON EUROPEAN BAKERY MARKETS" (published in July 2020, updated in January 2021).
    - The 5<sup>th</sup> edition of the "BAKE-OFF BAKERY MARKETS IN EUROPE" study (published end-2019).
  - These have been enriched by Gira's ongoing work in other food sectors and by its consulting and research in the areas of consumer preferences, health, retail and foodservice.
  - We have an unrivalled data bank on bakery markets, and most of the large bakery companies and bakery associations have been clients of our research programs, giving Gira access to key industry players throughout Europe.
- **Extensive documentary research** covering all aspects of the product supply chains, the Dynamic Bakery segments to be analysed and the bakery supply chain network:
  - The trade press, industrial bakers' websites, retailer and association websites.
  - Existing consumer and sector studies etc.
  - National production and statistics - contacts with administrations and producer associations.
- **In-depth interviews with key operators in the European bakery supply chain:**
  - We have carried out numerous interviews with operators in all countries analysed, all along the bakery supply chain and especially with chained distribution channels and industrial bakers.
    - These have enabled us to both fill in the gaps left by the documentary research and to obtain the required qualitative insights on Dynamic Bakery markets' structure and industrial bakers' strategies, as well as on likely future developments in the markets and the competitive environments for operators.
  - The interviews have been carried out by Gira's expert interviewer team, who has essentially targeted:
    - Significant industrial bakers.
    - Modern retailers, chained foodservice and bakery chains operators.
    - Bakery wholesalers and ingredient suppliers.
    - Equipment manufacturers.
    - Associations, authorities and experts.
  - Gira's reputation in the sector allows us unrivalled access to the industry.
- **Extensive indicative store checks:**
  - For fresh and packaged Dynamic Bakery segments.

## Timing

The reports have been published in November 2023.

## Subscription Price

The **full subscription price for the complete study** is **Euro 14'500** (before any applicable tax).

The price includes:

- One Synthesis volume.
- Six Country reports.
- One Webinar.

Subscription **options** are available:

- 1 Dynamic Bakery segment: EUR 6'000 (before any applicable tax).
- 1 country report: EUR 3'000 (before any applicable tax).
- Other options are available on request.

## Reports

The full study is written in a PowerPoint-style report, which is easy to navigate. Clients will receive reports electronically in searchable and printable PDF format.

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

## Presentation

Gira is pleased to offer one free presentation/workshop of the findings and conclusions of the study to clients in offices based in Europe; only travel expenses to the client's office will be rebilled at cost.

**For more information, please contact our industry specialists**

## Contacts

Anne Fremaux (Bakery Director)  
Ségolène Foissac (Consultant - Bakery)  
+33 (0)4 50 40 24 00

[a.fremaux@girafood.com](mailto:a.fremaux@girafood.com)  
[sfoissac@girafood.com](mailto:sfoissac@girafood.com)

Over the last 40 years we have built up a **major reputation** and client base in the international bakery sector.

- A list of our more recent bakery clients is given on the next page of this proposal.
- Gira has carried out numerous assignments in recent years for bakery companies, especially in the area of fresh bakery product distribution and production.
- Gira is active in strategy consulting and market research in most food and drink sectors worldwide. More details are available on [www.girafood.com](http://www.girafood.com).

Gira's **extensive network of international experts**, contacts and clients all along the bakery chain means that Gira is uniquely qualified to carry out this innovative and highly challenging research and analysis project.

- Experience has also shown that our long-standing reputation for research and consultancy in the global market opens doors for us to the most informed and competent sources of information.

Gira's team of managers and consultants is probably **the most experienced and knowledgeable** in the European bakery markets today:

- The Gira team is supervised by **Anne Fremaux**, Director of Bakery, 33 years with Gira.
  - She is responsible for all Gira's bakery research projects, and she is well-known for her expertise throughout the European bakery sector.
  - She has headed up a very large number of strategic consultancy, due diligence and research assignments throughout the food and drink chain worldwide.
  - She is the leading contact for clients.
- **Ségolène Foissac** is the **project manager** of this study, 7 years with Gira.
  - She is responsible for a large range of studies in Spain and Latin America at Gira.
  - She has worked successfully on all the latest Bakery studies.
- Our team consists of **Gira consultants with wide experience in the bakery sector**, retail and foodservice, each of whom has **deep knowledge of the individual country market** and industries for which she/he is responsible.
  - Most of the Gira team had also worked on the last editions of the Bakery Panorama and the Bake-off studies, the COVID-19 and the Bakery Chains reports.

AB-Mauri	Dutch Bakery	Lesaffre	Pasquier
Agromousquetaires	Erlenbacher Backwaren	Lidl	Pastisart
AIBI Aisbl	Eurial	Lieken	Pôle Bakery Soufflet
AIT Ingrédients	Eurogerm	Limagrain	Pouly
Almarai	Europain	LLI Goodmills	Puratos
Ankerbrot	Europastry	Mademoiselle Desserts	Phil Savours
Arla Pro	European Flour Milling Association	Mane	Pomona
Artadi Alimentacion	European Union	Mapple Leaf Foods	Rabobank
Aryzta	Evergrain	Mc Key Holdco	Rademaker
Asemac	IFF	Mecatherm	Rich Products Corp.
Atrian Bakers	Fazer	Mitsui & co Benelux	Royale Lacroix
Baker & Baker	Fedima	Monbake	Sammontana
Barry Callebaut	Ferrero	Mondial Forni	Sasa Industries
Bimbo	Forno d'Asolo	Monoprix	Smart 74
Bridor	Fourneo	Nederlands Bakkerij Centrum	Smilde Bakery
Cargill	Friesland Campina	Nestlé	Solvay Aroma Performance
Carrefour	Gemef Industries	Neuhauser	Système U
CEBP Aisbl	Gourmand Pastries	Novozymes	Transgourmet
Ceres	Hack	Nowel	Unigrà
CNIEL	Holder-Château Blanc	Nudespa	Unigrains
Cofalec	Ingredient	Nutrixo	Uno Bakeries
Complet	Ipasa	Oetker-Condifa Ancel	Upfield
Confédération de la Boulangerie	IPC Europe	Orkla Food Ingredients	Valora
Coppenrath & Wiese	Irinox	Pagen	Valrhona
Corman	JBT Food Tech	Paillasse	Vandemoortele
CSM Ingredients	Kerry Ravifruits	Panamar Bakery Group	Wolf Butterback
Dawn Foods	La Lorraine Bakery Group	Pandriks Bake-off	Yamazaki Baking
Deco Industrie	Lantmännen Unibake	Panotel	Zeelandia
Delibreads	Leclerc Galec	Panzani	Banks and Investment Funds