

# MARKET INNOVATION OVERVIEW

**CATEGORY:** Bread, Pastry & Confectionery | **COUNTRY:** France

*Este documento foi elaborado no âmbito do projeto PortugalFoods Qualifica, com o objetivo de criar informação de alto valor acrescentado para as PME e restantes entidades do setor agroalimentar nacional, para que estas se possam posicionar estrategicamente no contexto do mercado global.*

*A informação contida neste documento provém do Observatório da PortugalFoods que, com recurso à plataforma Mintel, permite contribuir para a qualificação e sensibilização do setor agroalimentar, tanto ao nível do conhecimento sobre novos produtos e técnicas de produção, como ao nível do acompanhamento da evolução tecnológica e da evolução das preferências do consumidor.*

*A Mintel cataloga mais de 38 000 novos lançamentos de produto por mês, provenientes dos 86 mercados que monitoriza, analisando e categorizando todos os seus atributos, tais como os ingredientes, posicionamento e comunicação ao consumidor.*

*O Observatório da PortugalFoods constitui-se assim como uma ferramenta de grande importância para alicerçar o conhecimento das empresas do Setor Agroalimentar.*

## A REGIONAL INTRODUCTION:

### BREAD, PASTRY & CONFECTIONERY IN EUROPE, MIDDLE EAST AND AFRICA

#### BREAD AND BREAD PRODUCTS

**Positive health:** Bread producers have been struggling to retain consumers, who increasingly believe bread is unhealthy. Working to improve their nutritional profile (eg high protein, low carb, vitamin/mineral fortification) is one way to generate interest in the category again.

#### CAKES AND SWEET BAKERY

**Addressing sugar concerns:** Brands can offset consumers' health concerns by emphasising the social and sharing nature of cakes. Bite-sized portions can also position cakes as permissible treats.

#### BISCUITS, COOKIES AND CRACKERS

**Permissible snacking:** Biscuits which feature healthy and nutritionally dense ingredients, such as teff flour or so-called superfoods, can resonate with consumers who are looking for a better-for-you snack without sacrificing on indulgence.

#### CHOCOLATE

**Shrink format sizes:** A way to reduce sugar content without compromising flavour appeal is through portion control. Launching bite-sized formats has proven to be a popular strategy to deliver a permissible indulgence, enabling consumers to maintain portion control.



## BREAD, PASTRY & CONFECTIONERY IN FRANCE

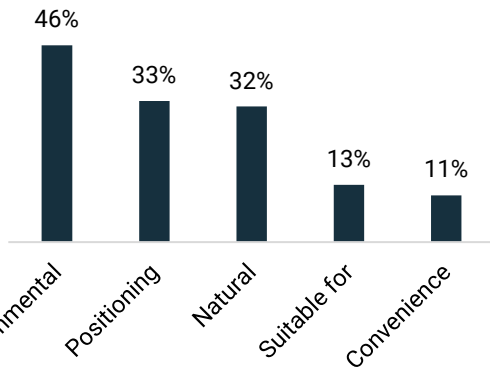
### Market Overview

The French bread, pastry and confectionery sector is expected to grow from €29.6 billion in 2018 to €33.1 billion by 2023, at a CAGR of 2.3%. In volume terms, the sector is expected to grow from 6.05 billion kg in 2018 to 6.33 billion kg by 2023, registering a CAGR of 0.9%.

Per capita consumption of bread, pastry and confectionery in France stood at 90.0kg in 2018 and is expected to grow and reach 92.6kg by 2023. Per capita expenditure in France stood at €439.9 in 2018 and is expected to reach 483.8kg by 2023. (GlobalData, 2020)

### New Product Development Analysis

Top 5 Category of Claims of Bread, Pastry & Confectionery product launches

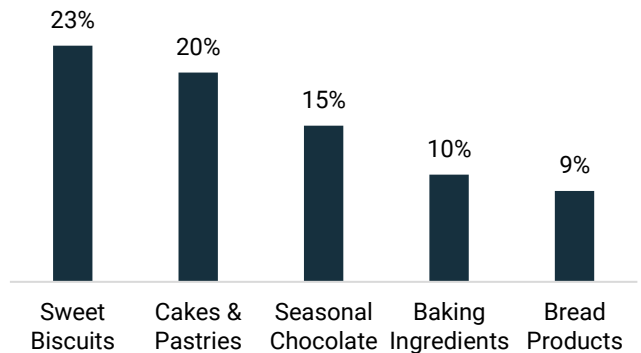


**24%**

of food products launched in France between July 2018 and June 2019 were Bread, Pastry & Confectionery Products.

Nearly half of the products launched in the Bread, Pastry & Confectionery French market (July 2018 – June 2019) featured 'Ethical & Environmental' claim like the 'Environmentally Friendly Package' and the 'Recycling' claims. The 'Seasonal' claim was responsible for the 2<sup>nd</sup> place ('Positioning' claim category).

Top 5 Sub-Categories in Bread, Pastry & Confectionery product launches



In the Bread, Pastry & Confectionery sector, almost a quarter of new product launches happened in the 'Sweet Biscuits' sub-category. The 'Cakes, Pastries & Sweet Goods' saw a 20% share of the total launch activity in the sector.



This handmade product retails in a partly recyclable pack featuring the AB, EU Green Leaf and Entrepreneurs + Engagés logos.



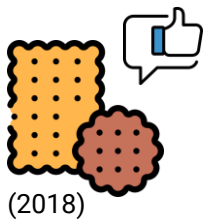
This product is free from gluten, palm oil, dairy products, soya and corn, and retails in a partly recyclable pack.



This seasonal product retails in a 370g pack and was added to the range for Father's Day 2019.



## THE FRENCH CONSUMER



**60%** I'd like to see more biscuits with **added health benefits** (eg omega 3, high fibre)

**63%** I would eat more biscuits in they were **lower in sugar**

(2018)

**71%**

It is important to **know where the ingredients** in bread/baked good have **come from**



(2019)

**29%**

Would like to see more of bread/baked goods made with **more nutritious flour** (eg spelt, quinoa flour)

**49%** Have positive attitudes towards **vegan chocolate** (% of chocolate eaters)



(2018)

(GlobalData, 2020)

## A GLOBAL LOOK INTO THE FUTURE

### BREAD, BAKERY AND CAKES

**The future is balanced:** That consumers reject fad diets and take a more balanced approach to health indicates continued opportunity in bakery products with positive health qualities. However, producers must find a way to marry health with indulgent qualities.

### BISCUITS, COOKIES AND CRACKERS

**New sensations:** Texture and temperature are the new frontiers when it comes to differentiating sweet and savoury bakery innovations and enticing more adventurous consumers.

### CHOCOLATE

**"No animal anything" continues to gain ground:** The move away from animal continues to drive innovation and capture consumers' attention.

*Para mais informações acerca do Observatório da PortugalFoods, por favor contactar*

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