

## MARKET INNOVATION OVERVIEW

**CATEGORY:** Honey & Sweet Spreads | **COUNTRY:** Poland

*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:

#### HONEY & SWEET SPREADS IN EUROPE, MIDDLE EAST AND AFRICA

**Respond to demand for natural ingredients:** Consumer interest in natural, organic and unprocessed ingredients is booming, and sweet spreads brands have the opportunity to capitalise by removing additives and preservatives and formulating with natural ingredients.

**Boost the nutritional profile:** Sweet spread brands can tap into the growing interest in immunity and nutrition brought on by the COVID-19 pandemic by highlighting inherent nutrients, along with the addition of remedial plant ingredients such as ginger and turmeric.

**Appeal to the senses:** Giving consumers an intense or memorable sensory experience can heighten the appeal of spreads. There are opportunities to innovate around spicy salsas, visually arresting honey infused with silver flakes or adding the distinctive texture of popcorn.



## HONEY & SWEET SPREADS IN POLAND

### Market Overview

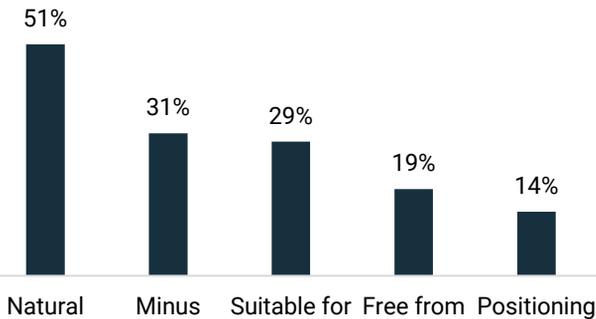
The polish honey and sweet spreads sector is expected to grow from €381.5 million in 2019 to €502.6 million by 2024, at a CAGR of 5.7%. In volume terms, the sector is expected to grow from 54.0 million kg in 2019 to 58.3 million kg by 2024, registering a CAGR of 1.5%.

Per capita consumption of honey and sweet spreads stood at 1.41kg in 2019 and is expected to grow and reach 1.55kg by 2024. Per capita expenditure stood at €9.98 in 2019 and is expected to reach €13.4 by 2024. (GlobalData, 2021)

### New Product Development Analysis

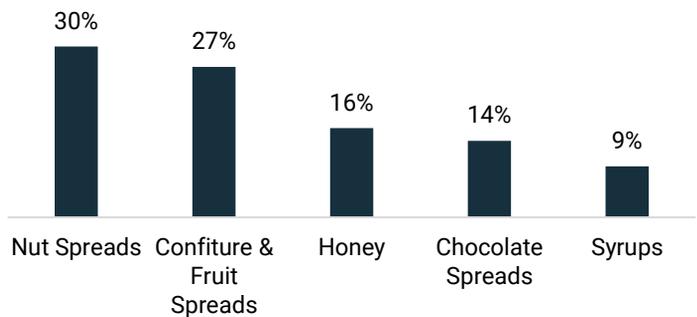
**5%** of food products launched in Poland in 2020 were Honey & Sweet Spreads.

Top 5 Claim Categories in Honey & Sweet Spreads product launches, 2020



The claim that registered the most use was the 'Organic' claim, from the 'Natural' category. The 2<sup>nd</sup> most used claim was the 'No Added Sugar' which pushed the 'Minus' category. From the 'Suitable for' claim category, it was the 'Vegan' claim that was at the top.

Top 5 Sub-Categories in Honey & Sweet Spreads product launches, 2020



The 'Nut Spreads' sub-category was the most active in terms of new product launches, with a 30% share of NPD. The 'Confiture & Fruit Spreads' sub-category was not far behind.



This vegan and organic product has been made without the use of chemical or synthetic pesticides or mineral nitrogen fertilisers.



This jam has been prepared with 195g of fruit per 100g of product and contains only naturally occurring sugars with no added sugar



This product retails in a 250g pack featuring the EU Green Leaf logo.



## THE POLISH CONSUMER

Agree with (2018)

**64%**

The **sugar content** in sweet spreads is concerning



**62%**

**Premium varieties** of spreads are worth paying more for

Factors encouraging the purchase of more sweet spreads (2017)

**56%**

Low sugar

**44%**

New flavour

**42%**

Low fat

**34%**

Non-GMO

Types of sweet spread eaten in the last 12 months (2018)



Jam/conserva

**78%**



Honey

**69%**



Chocolate or hazelnut spread

**48%**

(GlobalData, 2021)

## A GLOBAL LOOK INTO THE FUTURE

**Prioritise natural recipes:** The heightened consumer interest in natural foods can be leveraged by sweet spread brands by reformulating with organic ingredients, eliminating artificial additives and GMOs.

**Explore functional health benefits:** There is room for spread brands to highlight inherent nutritional qualities along with formulating with functional ingredients which are associated with boosting energy or supporting immunity to stand out in the crowded marketplace.

**Challenge expectations with exciting ingredients:** Brands can pique consumer interest by innovating with unique ingredients such as whole coffee beans or granola, along with unique combinations such as ghee and chocolate.

*Para mais informações acerca do Observatório da PortugalFoods, por favor contactar [knowledge.division@portugalfoods.org](mailto:knowledge.division@portugalfoods.org)*

