

MARKET INNOVATION OVERVIEW

CATEGORY: Side Dishes | **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:

SIDE DISHES IN EUROPE, MIDDLE EAST AND AFRICA

Expect vegan claims to rise: Consumers growing appetite for plant-based diets is driving vegan innovation in pasta, rice and noodles, particularly in instant formats. As a result, vegan products hold appeal beyond the small group of consumers who strictly avoid animal ingredients, and show long-term potential in the category.

Positioning as a slimming meal accompaniment: Products with low carbohydrate or calorie claims will appeal to a large group of diet-conscious consumers. However, brands must bear in mind that nutritional content is an equally important health driver, signalling the need for a more rounded better-for-you proposition.

Boost the share of non-plastic packaging: Plastic packaging is prevalent in pasta, rice and noodles, causing concern among consumers and illustrating the need for more sustainable packaging materials.



SIDE DISHES IN POLAND

Market Overview

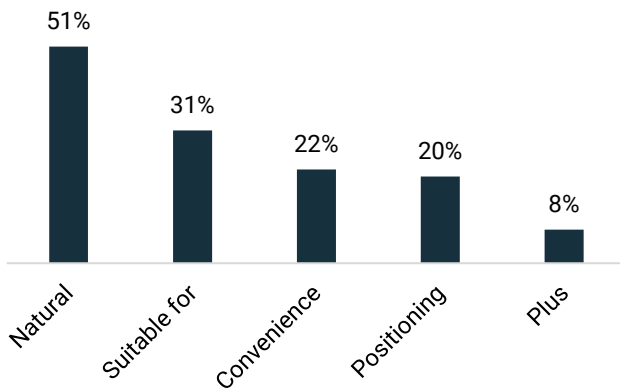
The Polish side dishes sector is expected to grow from €477.6 million in 2019 to €733.3 million by 2024, at a CAGR of 9.0%. In volume terms, the sector is expected to grow from 225.8 million kg in 2019 to 292.8 million kg by 2024, registering a CAGR of 5.3%.

Per capita consumption of side dishes in Poland stood at 5.91kg in 2019 and is expected to grow and reach 7.77kg by 2024. Per capita expenditure stood at €12.5 in 2019 and is expected to reach €19.5 by 2024. (GlobalData, 2021)

New Product Development Analysis

7% of food products launched in Poland in 2020 were Side Dishes.

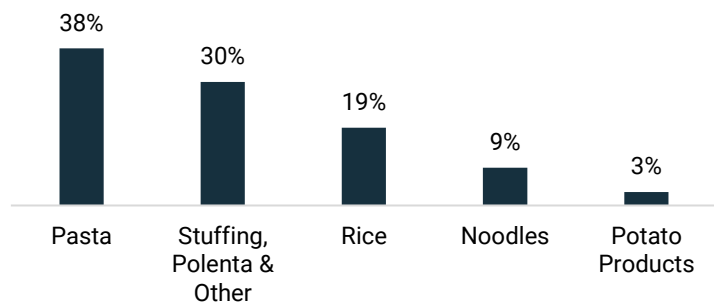
Top 5 Claim Categories in Side Dishes product launches, 2020



In the side dishes sector, more than half of the products launched featured a 'Natural' claim, with the 'Organic' claim leading the pack. The 'Gluten Free' claim drove the 'Suitable for' category to the 2nd place, while the 'Convenience' claim category was pushed by the 'Ease of Use' claim.

The 'Pasta' sub-category registered more than a third of the new products launched in the side dishes sector. 'Stuffing, Polenta & Other Side Dishes' took the 2nd place.

Sub-Categories in Side Dishes product launches, 2020



This inspired by Italy organic product is a source of protein and is made of 100% durum wheat.



This vegan product is free from gluten and GMO and retails in a 100g pack.



This vegan and microwavable product is said to be perfectly cooked, and is ready-to-eat hot or cold.



THE POLISH CONSUMER

RICE

Agree with (2018)

PASTA

57%

Ready-to-heat rice takes the worry out of cooking



Regular pasta is tastier than gluten-free pasta

53%

59%

Blends of rice and ancient grains (eg quinoa, barley) are a healthier alternative



Fresh pasta is of better quality than dry pasta

55%

Formats of pasta and rice interested in trying (2018)

62%

Rice that can be prepared by just adding hot water



64%

Pasta sold in pack sizes tailored for just one meal

(GlobalData, 2021)

A GLOBAL LOOK INTO THE FUTURE

Explore ethical and sustainable features: The widespread use of plastic packaging in pasta, rice and noodles presents a challenge for brands, considering consumer interest in more sustainable alternatives. Meanwhile, the rise of vegan claims illustrates how producers are striving to engage with meat reducers and flexitarians.

Target new 'safe bet' flavours and usage occasions: Brands can excite consumption frequency by using flavours which are familiar to consumers, but are yet to mainstream in pasta, rice and noodles, eg flavours inspired by local cuisines. Brands can also tap into a wider variety of eating occasions.

Deliver positive nutrition and functionality: There is plenty of room to innovate around positive nutrition with particular opportunities in high protein, fibre and vitamin/mineral fortification. Brands can formulate with ingredients (eg collagen) that also provide functional health benefits to stand out in the crowded marketplace.

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

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