

MARKET INNOVATION OVERVIEW

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

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

Expect more gut-friendly recipes: Digestive discomfort is a common reason for consumers to avoid bread. Explore more digestive-friendly recipes with healthy grains and seeds to jump on the gut-health trend. Fibre and probiotics can also pave the way for digestive-friendly bread.

CAKES AND SWEET BAKERY

Provide more diet-friendly options: Despite the indulgent nature of most cakes, consumers are also seeking out more healthful options to meet their evolving dietary requirements, from reduced sugar to low fat and lowcalorie options.

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 GERMANY

Market Overview

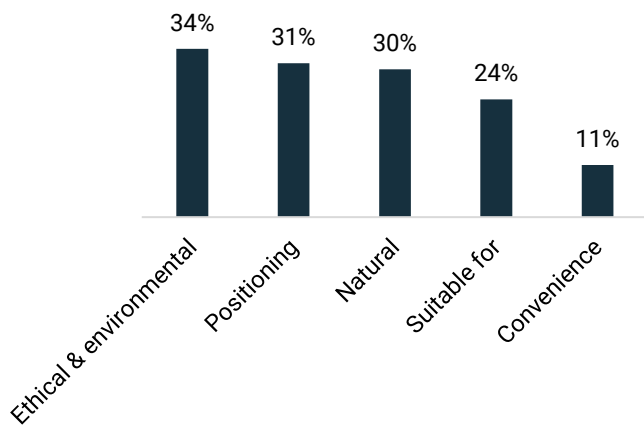
The German bread, pastry and confectionery sector is expected to grow from €30.2 billion in 2018 to €32.8 billion by 2023, at a CAGR of 1.7%. In volume terms, the sector is expected to decrease from 7.56 billion kg in 2018 to 7.24 billion kg by 2023, registering a CAGR of -0.9%.

Per capita consumption of bread, pastry and confectionery in Germany stood at 90.6kg in 2018 and is expected to decrease to 86.4kg by 2023. Per capita expenditure in Germany stood at €362.2 in 2018 and is expected to grow and reach €385.4 by 2023. (GlobalData, 2020)

New Product Development Analysis

26% of food products launched in Germany in 2019 were Bread, Pastry & Confectionery products.

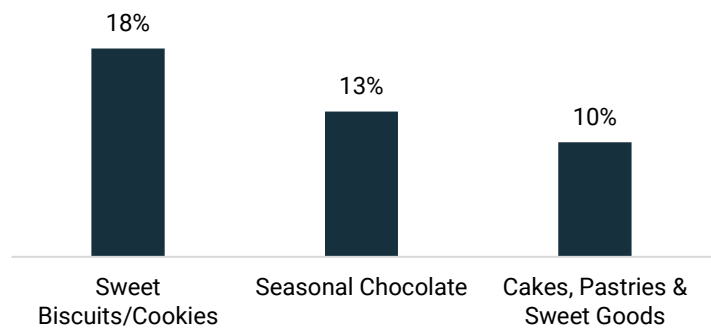
Top 5 Claim Categories in Bread, Pastry & Confectionery product launches, 2019



A quarter of the products launched in this sector featured the 'Ethical – Human' claim, from the 'Ethical & environmental' category. 'Seasonal' was the top claim from the 'Positioning' category, while the 'Organic' claim pushed the 'Natural' category.

The sub-category with the most new product launch activity was the 'Sweet Biscuits/Cookies', accounting for 18% of the launches. 'Seasonal Chocolate' and 'Cakes, Pastries & Sweet Goods' followed behind.

Top 3 Sub-Categories of Bread, Pastry & Confectionery product launches, 2019



This gluten-free product is made with Belgian chocolate from Fairtrade-certified cocoa.



This product was made available for Christmas 2019 and features a chocolate decorated tree.



This organic product retails in a 900g pack bearing the Gää e. V. and EU Green Leaf logos.



THE GERMAN CONSUMER

60%

It's important to know where the ingredients in bread/baked goods have come from



(2019)

63%

Bread that has a distinct flavour due to the cooking process (eg wood fired) is more appealing than standard bread

Types of biscuits interested in buying (2018)



25%

Multi-textural biscuits (eg crunchy coating with soft centre)

29%

Biscuits sweetened with fruit instead of added sugar

28%

A reduced calorie version of my favourite biscuit (eg with less sugar, low fat)



47%

Raw chocolate

Haven't tried but would be interested in trying (2018)

42%

Reduced sugar chocolate

33%

Organic chocolate

A GLOBAL LOOK INTO THE FUTURE

(GlobalData, 2020)

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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