

Business Review
Bakery Ingredients and Intermediates
EUROPE
2021 - 2026

INTRODUCTION While, in both bread and pastry sectors, the consumer wishes no 'apparent' change in end-products due to the traditional nature of the industry, ingredient producers have been at the forefront of rapid technological change. Pressures to simplify processes at the bakers' premises have offered new opportunities to ingredient suppliers, and enabled bakers to keep a tight leash on costs. Some ingredient groups have evolved significantly in recent years, with an increasing use of complex mixes and concentrates at various levels within the industry. Recently, vegan, ancient grains, natural additives, GMO, and enzymes, amongst others, have taken the forefront among issues facing the intermediate producers.

Europe has the highest consumption of baked goods. Per capita annual consumption in Europe is about 50kg, albeit with significant variation amongst the different member countries. Price sensitivity has also increased due to the impact of COVID-19.

Giract, the international ingredients and technologies specialist, has published highly-successful studies on bakery mix/improver markets in 2007 and 2015 covering the western markets of the EU and the USA. Additionally, it has published comprehensive studies on the Chinese and South Korean markets for these ingredients. As a response to the changing dynamics of the European bakery sector, as well as the dramatic impacts of the pandemic, Giract is conducting a complete re-investigation of the European bakery ingredients and intermediates market.

OBJECTIVES The key objectives of this report are:

- A review of current and potential products, their specifications, applications
- An analysis of the producers, their market shares, and exports
- An appreciation of "why" and "why not" concerning the key products based on interviews with producers and retailers/food service users across the countries of scope
- An evaluation of the impact on the industry by new and on-going factors such as vegan/vegetarian, GMO, no-additive/clean label, natural, sustainable, etc.
- An identification of the current (2021) market size by product group, sector, country, and forecast demand volumes and values for 2026

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PRODUCTS - BAKERY

Margarines: vegetable fats for use in baked goods
Enzymes: including alpha-amylase, glucose oxidase, xylanase, lipase, etc.
Yeast: including fresh and DIY
Emulsifiers: dough strengtheners and softeners
Improvers: flour correctors/improvers with emulsifiers, fats, malt etc.
Concentrates: mixes without, or with up to 20% addition of flour
Mixes: ready-to-use flour-based mixes
Pre-mixes: ready to use mixes with part (usually 40-60%) flour addition
Baking powders
Sourdough: ready-to use starters and mixes

PRODUCTS - VIENNOISERIE/PATISSERIE

Cake gels
Fine patisserie mixes
Cake mixes
Cake improvers
Custard cream mixes
Fruit and cream mixes
Non-dairy creams
Glazings, icings, fudges
Nut pastes
Flavorings
Egg wash alternatives

PRODUCTS - CHOCOLATE

Chocolate fillings, includes nut-based chocolate fillings
Belgian Chocolate
Non-Belgian Chocolate
Compound chocolate

SECTORS

Bread: loaves, rolls, bagels, etc.; **Flat-bread:** naan, pita, pizza, etc.; **Laminated items:** croissants, Danish, savory puff pastry; **Frozen dough:** ready-to-bake bread, steam-bread, etc.; **Patisserie and Viennoiserie**

MARKETS

EU27+UK+NO+CH, *focus:* UK, France, Germany, Italy, Netherlands, Belgium, Spain, Poland

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