

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

## TIMESCALE

Current 2021; Forecasts 2026

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