

Bread - Ireland - April 2016

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The bread market has enjoyed growth between 2014 and 2015, but deep discounting in the packaged bread sector of the market will inhibit future growth. However, with growing consumer confidence seeing more consumers splashing out on morning goods and specialist breads, this will help to sustain value growth."

– Brian O'Connor, Senior Consumer Analyst

This report looks at the following areas:

With price competition between discounters and traditional supermarkets continuing to increase, this has driven down the cost of bread products to consumers; however, the value of the market is expected to continue to grow in 2016 with improved usage of speciality bread and morning goods among NI and RoI consumers.

Moving forward, increasing concern over the sugar and salt content of bread and baked goods will see healthier-minded consumers seek products that claim to have lower levels of these ingredients and likely will drive innovation within the category.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Bread - Ireland - April 2016

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

- What you need to know
- Issues covered in this report

Executive Summary

The market

Figure 1: Estimated value of the total bread and bread products market, by segment, NI and RoI, 2014 and 2015

Forecast

Figure 2: Indexed estimated value of the total bread/bread products market, NI and RoI, 2010-21

Market factors

- Costs of bread and baked goods fall
- One in five RoI consumers bake at home
- Authenticity and artisan trend helping to drive growth
- Room for innovation in salt-free alternatives

The consumer

Sliced loaves most popular pre-packaged options

Figure 3: Types of pre-packaged bread bought in the last three months, NI and RoI, February 2016

Figure 4: Types of bread bought from in-store bakeries/traditional bakeries in the last three months, NI and RoI, February 2016

Pancakes and scones favoured baked goods

Figure 5: Types of pre-packaged baked goods bought in the last three months, NI and RoI, February 2016

Figure 6: Types of baked goods bought from in-store bakeries/traditional bakeries in the last three months, NI and RoI, February 2016

Irish consumers want fresh packaging

Figure 7: Types of bread Irish consumers are interested in trying, NI and RoI, January 2016

Salt and sugar key concerns for Irish consumers

Figure 8: Agreement with statements relating to bread and baked products, NI and RoI, February 2016

The Market – What You Need to Know

- Slow but steady growth in bread market
- Bread and baked good prices fall
- Baking at home remains popular
- Artisan trend helping to boost speciality bread market
- Salt levels a growing concern

Market Size and Forecast

Bread market value improves despite falling consumer prices

Figure 9: Estimated value of the total bread/bread products market, NI and RoI, 2010-21

Growth in morning goods while pre-packaged bread value declines

Figure 10: Estimated value of the total bread and bread products market, by segment, NI and RoI, 2014 and 2015

Speciality bread sales grow

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Bread - Ireland - April 2016

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 11: Estimated value of the speciality bread segment, NI and RoI, 2014 and 2015

Figure 12: Indexed speciality food sales versus all grocery sales, by value, IoI, NI and RoI, 2010-20

Market Drivers

Bread prices decline

Figure 13: Consumer Price Indices of bread and other bakery products, RoI, March 2011-March 2016

Figure 14: Consumer Price Indices of cereal bread and other bakery products, UK (including NI), April 2011-February 2016

Figure 15: Types of food and drink grocery products bought at Aldi and Lidl in the last three months, NI and RoI, September 2015

RoI consumers more likely to bake from scratch compared to GB

Figure 16: How often consumers bake from scratch at home, RoI and GB, 2011 and 2015

The drive for authenticity and naturalness boosting artisan bread usage

Figure 17: Top five specialist/artisan food and drink retailers that consumers have shopped at in the last three months, NI and RoI, March 2015

Salt levels in bread a concern

Three quarters want less salt

Figure 18: Agreement with the statement 'Companies should do more to reduce the salt content in bread/baked goods ', NI and RoI, January 2016

Figure 19: New bread products launched claiming to be low in sodium/salt, UK and Ireland, 2007-15

Companies and Innovations – What You Need to Know

Allied Bakeries set to increase pancake production

Genius Foods reformulates bread with vitamins and minerals

Pat the Baker acquires Irish Pride assets

Premier Foods partners with Paul Hollywood

Tesco and Asda pioneer private-label launches

Manufacturers use ancient grains

Thinner and smaller formats target snacking occasions

Who's Innovating?

Private label regains share in NPD

Figure 20: Number of new product launches in the bread market, by private label vs. branded, UK and Ireland, 2011-15

Vegetarian remains top claim

Figure 21: Top five claims on new product launches in the bread market, UK and Ireland, 2011-16

Smaller formats tap into snack occasions

Companies and Brands

Allied Bakeries

Key facts

Product range

Brand NPD

Recent developments

Aryzta

Key facts

Product range

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Bread - Ireland - April 2016

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Recent developments

BFree

Key facts

Product portfolio

Brand NPD

Recent developments

Genesis Crafty

Key facts

Product portfolio

Recent developments

Genius Foods

Key facts

Product portfolio

Brand NPD

Recent developments

WHW Bakeries (Irish Pride)

Key facts

Product portfolio

Brand NPD

Recent developments

Irwin's Bakery

Key facts

Product portfolio

Brand NPD

Recent developments

Joseph Brennan Bakeries

Key facts

Product portfolio

Brand NPD

Recent developments

Pat the Baker

Key facts

Product portfolio

Brand NPD

Recent developments

Premier Foods

Key facts

Product portfolio

Brand NPD

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Bread - Ireland - April 2016

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Recent developments

Kelkin

Key facts

Product portfolio

Brand NPD

Udi's

Key facts

Product portfolio

Brand NPD

Recent developments

The Consumer – What You Need to Know

Sliced white loaf and wraps top used pre-packaged bread

Pancakes and scones top pre-packaged baked goods

Irish consumers want fresh packaging

Strong demand for more action on salt

The Consumer – Usage of Bread Products

Sliced white loaf most used type of pre-packaged bread

Figure 22: Types of pre-packaged bread bought in the last three months, NI and RoI, February 2016

White bread comes out on top of wholemeal and granary bread

Figure 23: Types of sliced pre-packaged bread bought in the last three months, NI and RoI, February 2016

Figure 24: Types of sliced pre-packaged bread bought in the last three months, by age, NI and RoI, February 2016

Wraps see strong usage

Figure 25: Consumers who bought pre-packaged wraps, by gender and social class, NI and RoI, February 2016

NI consumers have a greater appetite for buns/rolls/baps

Figure 26: Consumers who have bought pre-packaged savoury buns/rolls/baps vs those bought via in-store/traditional bakeries, NI and RoI, February 2016

Baguettes top type of fresh bread from bakeries

Figure 27: Types of bread bought from in-store bakeries/traditional bakeries in the last three months, NI and RoI, February 2016

Cost and shelf life holding back higher usage of fresh baked bread

Fresh baguettes show strongest usage among

Figure 28: Consumers who bought baguettes from in-store bakeries/traditional bakeries in the last three months, by age, NI and RoI, February 2016

Traditional Irish breads see lower usage via in-store/traditional bakeries

The Consumer – Usage of Baked Goods

NI consumers twice as likely to have bought pre-packaged pancakes

Figure 29: Types of pre-packaged baked goods bought in the last three months, NI and RoI, February 2016

Men more likely to buy pre-packaged scones

Figure 30: Consumers who bought pre-packaged scones, by gender, NI and RoI, February 2016

Scones and pastries top fresh baked goods

Figure 31: Types of bread bought from in-store bakeries/traditional bakeries in the last three months, NI and RoI, February 2016

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Bread - Ireland - April 2016

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Pastries most likely to be bought by women in RoI

Figure 32: Consumers who bought pastries from in-store bakeries/traditional bakeries, by gender and social class, NI and RoI, February 2016

The Consumer – Interest in Bread Innovations

Keeping bread fresh for longer a priority

Figure 33: Types of bread Irish consumers are interested in trying, NI and RoI, February 2016

Figure 34: Interest in trying bread in packaging that keeps it fresher for longer, by age, NI and RoI, February 2016

Ready-made bread dough appeals to women

Figure 35: Interest in trying ready-made bread dough, by presence of children in household, NI and RoI, February 2016

Women more interested in doughs

Savoury bread rolls with baked-in fillings appeal to Millennials

Figure 36: Interest in trying savoury bread rolls with packed in fillings, by age, NI and RoI, February 2016

Affluent consumers want more exotic types of bread

Figure 37: Interest in trying more exotic types of bread (eg Focaccia Ligure, Focaccia al Pomodoro), by social class, NI and RoI, February 2016

The Consumer – Attitudes towards Bread

Strong demand for more action on salt

Figure 38: Agreement with statements relating to bread and baked products, NI and RoI, February 2016

Salt a key issue to mature RoI consumers

Figure 39: Agreement with the statement 'Companies should do more to reduce the salt content in bread/baked goods', by age, NI and RoI, January 2016

Sugar content worrying to Irish consumers

Figure 40: Agreement with statements relating to sugar in bread and baked goods, NI and RoI, January 2016

Figure 41: Agreement with statements relating to sugar in bread and baked goods, by gender, NI and RoI, January 2016

Two thirds of Irish consumers prefer NI/RoI-branded bread

Figure 42: Agreement with the statement 'I prefer to buy Northern Ireland /Irish-branded packaged sliced bread (eg Brennans, Irwin's)', by gender, NI and RoI, January 2016

Appendix – Data Sources, Abbreviations and Supporting Information

Market size rationale

Data sources

Consumer data sources

Generational cohort definitions

Abbreviations

Appendix – The Consumer

NI Toluna data

Figure 43: Types of pre-packaged bread products bought by consumers in the last three months, by demographics, NI, February 2016

Figure 44: Types of pre-packaged bread products bought by consumers in the last three months, by demographics, NI, February 2016 (continued)

Figure 45: Types of pre-packaged bread products bought by consumers in the last three months, by demographics, NI, February 2016 (continued)

Figure 46: Types of fresh bread products from in-store/traditional bakeries bought by consumers in the last three months, by demographics, NI, February 2016

Figure 47: Types of fresh bread products from in-store/traditional bakeries bought by consumers in the last three months, by demographics, NI, February 2016 (continued)

Figure 48: Types of pre-packaged baked products bought by consumers in the last three months, by demographics, NI, February 2016

Figure 49: Types of pre-packaged baked products bought by consumers in the last three months, by demographics, NI, February 2016 (continued)

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Bread - Ireland - April 2016

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Figure 50: Types of fresh baked products from in-store/traditional bakeries bought by consumers in the last three months, by demographics, NI, February 2016
 Figure 51: Types of fresh baked products from in-store/traditional bakeries bought by consumers in the last three months, by demographics, NI, February 2016 (continued)
 Figure 52: Types of bread products that consumers would be interested in trying, by demographics, NI, February 2016
 Figure 53: Types of bread products that consumers would be interested in trying, by demographics, NI, February 2016 (continued)
 Figure 54: Agreement with the statement 'Bread is not a good option for those trying to lose weight', by demographics, NI, February 2016
 Figure 55: Agreement with the statement 'Frozen/ready-to-bake breads/baked goods (eg baguettes) are just as good as buying bread/baked goods from a bakery fresh', by demographics, NI, February 2016
 Figure 56: Agreement with the statement 'Sliced bread contains too many artificial preservatives', by demographics, NI, February 2016
 Figure 57: Agreement with the statement 'I prefer to buy Northern Ireland /Irish-branded packaged sliced bread (eg Brennans, Irwin's)', by demographics, NI, February 2016
 Figure 58: Agreement with the statement 'Companies should do more to reduce the salt content in bread/baked goods ', by demographics, NI, February 2016
 Figure 59: Agreement with the statement 'It's easy to get bored with homemade sandwiches', by demographics, NI, February 2016
 Figure 60: Agreement with the statement 'It is worthwhile buying bread to put in the freezer', by demographics, NI, February 2016
 Figure 61: Agreement with the statement 'I am more likely to buy own-label breads or baked goods compared to 12 months ago', by demographics, NI, February 2016
 Figure 62: Agreement with the statement 'I'm concerned about the sugar content in bread', by demographics, NI, February 2016
 Figure 63: Agreement with the statement 'I'm concerned about the sugar content in baked goods', by demographics, NI, February 2016
 Figure 64: Agreement with the statement 'I only buy pre-packaged breads when fresh options aren't available', by demographics, NI, February 2016
 Figure 65: Agreement with the statement 'I would like to be able to pre-order/reserve fresh bread to pick up in-store', by demographics, NI, February 2016

Rol Toluna data

- Figure 66: Types of pre-packaged bread products bought by consumers in the last three months, by demographics, Rol, February 2016
 Figure 67: Types of pre-packaged bread products bought by consumers in the last three months, by demographics, Rol, February 2016 (continued)
 Figure 68: Types of pre-packaged bread products bought by consumers in the last three months, by demographics, Rol, February 2016 (continued)
 Figure 69: Types of fresh bread products from in-store/traditional bakeries bought by consumers in the last three months, by demographics, Rol, February 2016
 Figure 70: Types of fresh bread products from in-store/traditional bakeries bought by consumers in the last three months, by demographics, Rol, February 2016 (continued)
 Figure 71: Types of pre-packaged baked products bought by consumers in the last three months, by demographics, Rol, February 2016
 Figure 72: Types of pre-packaged baked products bought by consumers in the last three months, by demographics, Rol, February 2016 (continued)
 Figure 73: Types of fresh baked products from in-store/traditional bakeries bought by consumers in the last three months, by demographics, Rol, February 2016
 Figure 74: Types of fresh baked products from in-store/traditional bakeries bought by consumers in the last three months, by demographics, Rol, February 2016 (continued)
 Figure 75: Types of bread products that consumers would be interested in trying, by demographics, Rol, February 2016
 Figure 76: Types of bread products that consumers would be interested in trying, by demographics, Rol, February 2016 (continued)
 Figure 77: Agreement with the statement 'Bread is not a good option for those trying to lose weight', by demographics, Rol, February 2016
 Figure 78: Agreement with the statement 'Frozen/ready-to-bake breads/baked goods (eg baguettes) are just as good as buying bread/baked goods from a bakery fresh', by demographics, Rol, February 2016
 Figure 79: Agreement with the statement 'Sliced bread contains too many artificial preservatives', by demographics, Rol, February 2016
 Figure 80: Agreement with the statement 'I prefer to buy Northern Ireland /Irish-branded packaged sliced bread (eg Brennans, Irwin's)', by demographics, Rol, February 2016
 Figure 81: Agreement with the statement 'Companies should do more to reduce the salt content in bread/baked goods ', by demographics, Rol, February 2016
 Figure 82: Agreement with the statement 'It's easy to get bored with homemade sandwiches', by demographics, Rol, February 2016
 Figure 83: Agreement with the statement 'It is worthwhile buying bread to put in the freezer', by demographics, Rol, February 2016
 Figure 84: Agreement with the statement 'I am more likely to buy own-label breads or baked goods compared to 12 months ago', by demographics, Rol, February 2016
 Figure 85: Agreement with the statement 'I'm concerned about the sugar content in bread', by demographics, Rol, February 2016
 Figure 86: Agreement with the statement 'I'm concerned about the sugar content in baked goods', by demographics, Rol, February 2016
 Figure 87: Agreement with the statement 'I only buy pre-packaged breads when fresh options aren't available', by demographics, Rol, February 2016

BUY THIS
REPORT NOW

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
 EMAIL: reports@mintel.com

Bread - Ireland - April 2016

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 88: Agreement with the statement 'I would like to be able to pre-order/reserve fresh bread to pick up in-store', by demographics, RoI, February 2016

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com