

Report Price: £1095.00 | \$1478.58 | €1232.31

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



"Bread remains a staple in most Irish homes and as such, sales have remained positive despite the lingering popularity of low-carb diets. Although sugar consumption remains a concern, baked goods are somewhat exempt from this given the nature of the indulgence category and therefore offer an opportunity for brands to expand on the experience."

- Emma McGeown, Research Analyst

This report looks at the following areas:

- Packaged sliced loaves remains the top bread purchased
- . White packaged sliced loaves top the category
- Pastries show strong usage in RoI
- Pre-packaged bread preferred but habits differ when it comes to baked goods
- Bread is a good source of fibre

A basket staple, usage of bread is almost universal in Ireland, with most Irish consumers having bought some form of bread in the last month. However, bread consumption is changing owing to trends for healthier lifestyles, concerns about gluten and greater scrutiny with bread contents including artificial ingredients, salt and sugar. Despite health being a key consideration, this is having a limited impact on baked goods with many noting them as an indulgent 'treat' item.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL:EMEA
+44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

+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



Report Price: £1095.00 | \$1478.58 | €1232.31

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

Market sizes

Figure 1: Estimated value of the total bread/bread products market, NI and RoI, 2014-18

Figure 2: Market segmentation of the bread and baked goods market, NI and RoI, 2018

Forecast

Figure 3: Index of the total bread/bread products market, NI and RoI, 2014-24

Market factors

Wheat shortages see bread prices increase in 2018

Own-label bread and baked goods preferred

Bakeries are one of the top food specialists used

Six in 10 overweight or obese in Ireland

Companies and innovations

The consumer

Packaged sliced loaves remains the top bread purchased

Figure 4: Types of pre-packaged bread bought in the last month, NI and RoI, December 2018

White packaged sliced loaves top the category

Figure 5: Types of packaged sliced loaves of bread bought in the last month, NI and RoI, December 2018

Pastries show strong usage in RoI

Figure 6: Types of baked goods bought in the last month, NI and RoI, December 2018

Pre-packaged bread preferred but habits differ when it comes to baked goods

Figure 7: Where bread was bought, by location, NI and RoI, December 2018

Figure 8: Where baked goods were bought, by location, NI and RoI, December 2018

Bread is a good source of fibre

Figure 9: Agreement with statements relating to bread and baked goods, NI and RoI, January 2018

The Market - What You Need to Know

Pre-packaged bread dominates bread sales

Bread prices start to increase

Own-label preferred when it comes to bread and baked goods

Bakeries are one of the top food specialists used in IoI

Six in 10 currently overweight or obese in Ireland

Market Sizes and Forecast

IoI bread market worth €609 million in 2018

Figure 10: Estimated value of the total bread/bread products market, NI and RoI, 2014-24

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



Report Price: £1095.00 | \$1478.58 | €1232.31

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 total bread/bread products market, NI and RoI, 2014-24

Pre-packaged bread sales dominate the market

Figure 12: Estimated value of the total bread and bread products market, by segment, NI and RoI, 2018 and 2019

Figure 13: Market segmentation of the bread and baked goods market, NI and RoI, 2018

Market Drivers

Prices of baked goods decline in RoI

Figure 14: Consumer price index for food, bread and other bakery products, RoI, December 2017-January 2019

Figure 15: Consumer price index for food and non-alcoholic beverages and bread and cereal, UK (including NI), December 2017-January 2019

Hot summer in 2018 affected wheat supplies

Brand loyalty in bread and baked goods

Figure 16: Consumers' preference towards bread and baked goods, NI and RoI, September 2018

Figure 17: How consumers rate their current financial situation, NI and RoI, December 2018

Four in 10 use baker specialists

Figure 18: Types of food specialists/artisan retailers visited in the last three months, NI and RoI, September 2018

Growing obesity rates could see some cutting out bread

Figure 19: Overweight and obesity levels in adults aged 16+, NI, 2010/11-2017/18

Figure 20: Overweight and obesity levels in adults aged 15+, RoI, 2015/16 and 2016/17

Bread doesn't escape the sugar crackdown

Figure 21: How consumers manage their sugar intake, NI and RoI, June 2017

Companies and Brands - What You Need to Know

Aryzta in difficulty but sale ruled out for now

Bread brands in recyclable packaging push

Natural colorants make their way into bread

Genesis Crafty bought over, with new owner starting recruitment drive

Who's Innovating?

New product development has risen in the last five years

Figure 22: New bread & baked goods products launched, UK and Ireland, 2014-19

Claims relating to animal ingredients feature heavily

Figure 23: Claims analysis of bread & bread products launched, UK and Ireland, 2014-19

Figure 24: Selective diets that consumers currently adhere to, NI and RoI, June 2018

Brands seek to step up recycling credentials with increased claims

Leading brands Hovis and Kingsmill step up recycling efforts

Coloured bread and wraps beginning to trend

Rye bread launches increasing

Companies and Brands

Allied Bakeries

Key facts

Product portfolio

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



Report Price: £1095.00 | \$1478.58 | €1232.31

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

Brand NPD

Recent developments

Aryzta

Key facts

Product portfolio

Recent developments

BFree

Key facts

Product portfolio

Brand NPD

Recent developments

Genesis Crafty

Key facts

Product portfolio

Recent developments

Genius Foods Ltd

Key facts

Product portfolio

Brand NPD

Recent developments

Irish Pride Bakeries

Key facts

Product portfolio

Irwin's Bakery

Key facts

Product portfolio

Figure 25: Irwin's Bakery full product range, March 2019

Brand NPD

Recent developments

Joseph Brennan Bakeries

Key facts

Product portfolio

Recent developments

Kelkin

Key facts

Product portfolio

Brand NPD

Pat the Baker

Key facts



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



Report Price: £1095.00 | \$1478.58 | €1232.31

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

Product portfolio

Premier Foods

Kev facts

Product portfolio

Brand NPD

Recent developments

The Consumer - What You Need to Know

Packaged sliced loaves remains the top bread purchased

White bread is king

Pastries show strong usage in RoI

Pre-packaged bread preferred but preference differs with baked goods

Bread contents concern consumers as healthier breads demanded

Usage of Bread

Packaged sliced bread loaves are the most purchased bread

Figure 26: Types of pre-packaged bread bought in the last month, NI and RoI, December 2018

Packaged loaves are a staple in Irish households

Figure 27: Consumers who have bought packaged sliced loaves in the last month, by gender and age, NI and RoI, December 2018

Figure 28: Consumers who are mainly/wholly responsible for the main grocery shop in the household, by gender, NI and Roi,

Wraps appeal to parents

Figure 29: Consumers who have bought wraps/pitta/naan bread in the last month, by presence of children, NI and RoI, December 2018

Usage of Packaged Sliced Bread

White bread preferred among Irish consumers

Figure 30: Types of packaged sliced loaves of bread bought in the last month, NI and RoI, December 2018

Parents more likely to buy white bread

Figure 31: Consumers who have bought white packaged sliced loaves in the last month, by presence of children, NI and RoI, December 2018

A third eat multi-seed bread

Figure 32: Consumers who have bought sliced granary/multi-seed loaf in the last month, by age, NI and RoI, December 2018

Figure 33: Consumers who have bought sliced granary/multi-seed loaf in the last month, by social class, NI and RoI, December 2018

Healthier bread demands could see greater usage of ancient grains

Figure 34: Consumer agreement with the statement 'There should be a wider range of healthier breads', by age, NI and RoI, December 2018

Usage of Baked Goods

Pastries popular in RoI, while pancakes bought most in NI

Figure 35: Types of baked goods bought in the last month, NI and RoI, December 2018

Pastries offer a solution to those skipping breakfast

Figure 36: Consumers who have bought pastries (eg croissants) in the last month, by working status, NI and RoI, December 2018

The rise of doughnuts

Figure 37: Consumers who have bought doughnuts in the last month, by age, NI and RoI, December 2018

Scones and fruit loaf preferred by mature consumers

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



Report Price: £1095.00 | \$1478.58 | €1232.31

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

Figure 38: Consumers who have bought fruit loaf and scones in the last month, by age, NI and RoI, December 2018

Pre-packaged vs Fresh Bread and Baked Goods

Pre-packaged bread bought by seven in 10 Irish consumers

Figure 39: Where bread was bought, by location, NI and RoI, December 2018

Figure 40: Pre-packaged vs fresh from in-store bread purchases, by gender, NI and RoI, December 2018

Fresh preferred by RoI, while NI opt for pre-packaged baked goods

Figure 41: Where baked goods were bought, by location, NI and RoI, December 2018

Attitudes towards Bread and Baked Goods

Salt content concerns Irish consumers when it comes to bread

Figure 42: Agreement with statements relating to bread and baked goods, NI and RoI, December 2018

Bread is a good source of fibre

Figure 43: Consumer agreement with the statement 'Bread is a good source of fibre', by age, NI and RoI, December 2018

Desire for clean ingredients could provide opportunity for ancient grains

Figure 44: Agreement with the statements 'There should be a wider range of healthier breads' and 'Sliced pre-packaged bread contains too many artificial preservatives', NI and RoI, December 2018

Four in 10 looking for greater availability of gluten-free

Figure 45: Consumer agreement with the statement 'There should be more gluten-free bread and baked goods available', by gender, NI and RoI, December 2018

Appendix - Data Sources, Abbreviations and Supporting Information

Data sources

Generational cohort definitions

Abbreviations

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com