

In-Store bakery - US - 2023

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This report looks at the following areas:

- ISB items purchased
- Purchase driving ISB concepts
- Change in ISB purchases
- Perceptions of baked good purchase locations
- ISB occasions
- ISB attitudes

Despite ongoing financial pressures, 82% of ISB purchasers agree they are buying the same number of items or more from the ISB this year. The leading motivators among those buying more are treating for self or kids, indicating the value of indulgence. In fact, most are viewing products and experiences offered by the ISB as worth it despite inflated prices.

Unsurprisingly, there is a small base of consumers who are pulling back or being priced out of the category. Support for ongoing home cooking, fresh food in lieu of foodservice and the emotional benefits of indulgence are proving more important to many as prices increase. However, as conditions continue through 2024, the temptation of packaged center of store alternatives will likely strengthen.

Young consumers are the most likely to agree that all ISBs are the same and they are bored with offerings. They are also least likely to view the ISB as good for everyday groceries, which is a key growth opportunity for the department this year. Luckily, consumers aged 18-24 overindex across all measured purchase driving concepts, suggesting there are many innovation inroads to improving their perceptions.

ISB concepts of interest point to foodservice-like offerings, such as single-serve products, prepared food and perimeter of store meal deals. As consumers pull back on dining out and takeout as a means to save money, the ISB has an



“In-store bakeries currently benefit from financial motivation to eat at home. Successful ISBs will continue their evolution as a destination for everyday pick-me-ups and fresh meal solutions. While competition with center of store is stiff, ISB as an alternative to foodservice highlights value, convenience, ease and freshness.”

– Sydney Olson, Senior Food and Drink Analyst

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opportunity to fill the void. Women, who tend to be primary household shoppers and cooks, show especially strong interest in these concepts.

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