Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

**MARKET ACCESS SECRETARIAT**
**Global Analysis Report**

# Consumer Trends

## Breads, Cakes and Pastries in the United Kingdom

**December 2013**

## MARKET SNAPSHOT

Eaten by an overwhelming majority of British adults, bread and baked goods are dietary staples in the United Kingdom (U.K.). Retail sales of bread and baked goods climbed to US$9.03 billion in 2012, representing an increase of 0.13% from the previous year, and 5.3% since 2007.

Bread is the leading subcategory in terms of value sales with over US$5 billion in 2012, and is expected to remain the largest segment until 2017. Bread substitutes was the best performing segment in terms of value growth, expanding by about 28% from 2007 to 2012.

Over the forecast period of 2012 to 2017, growth in the bread category is expected to slow slightly, while cakes and pastries will see accelerating expansion, with total value growth rates of 10.6% and 23.6%, respectively (Euromonitor, 2013).

The cakes subcategory saw a jump in value sales in 2012, despite continuing to suffer some volume losses. This reversal of the declines registered in 2010 and 2011 may be due to increasing single-serve options with higher unit prices (Mintel, January 2012). As well, the Diamond Jubilee and 2012 Summer Olympic Games in London led to more parties and events across the U.K., perhaps increasing celebratory consumption of higher-end fare (Euromonitor, January 2013).

While overall value growth is expected over the forecast period for breads, cakes and pastries, this mature market faces challenges. Consumer concern with healthy eating, competition from rival categories, such as breakfast cereals and fast-food sandwich chains, as well as discounting and price cutting by major retailers in an attempt to boost sales, are all affecting this market.

The “free-from” bakery segment (e.g. gluten-free, fat-free, etc.) is flourishing in the U.K., although it remains a niche segment. This expansion could open up the bread market to a new segment of consumers.

## CONTENTS



Growing Forward 2

Canada

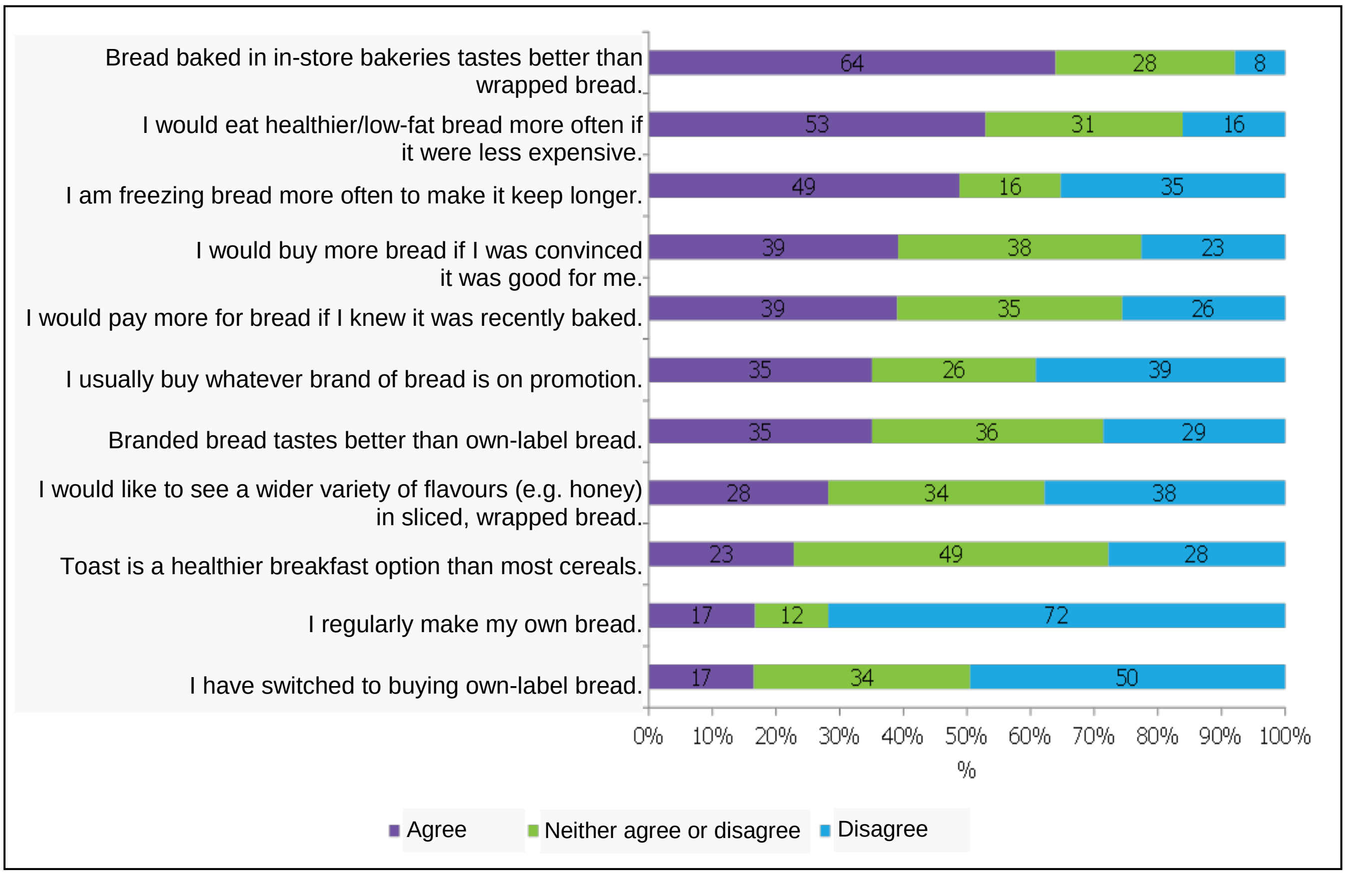
## CONSUMER TRENDS

In response to consumer demand and over-arching wellness trends, the bakery industry has increased the availability and variety of healthy breads, such as high-fibre loaves, gluten-free ranges and low-fat flat breads. Many bread, cake and pastry products have also been launched with added benefits, or an emphasis on health-related properties, such as multi-grain or whole-grain, as well as claims such as low/no/reduced fat, and no additives/preservatives. Health is generally a more important consideration for consumers with regard to bread and bread products, as cakes, pastries and sweet goods tend to be viewed as an indulgence or treat.

There appears to be a growing overall consumer preference for artisanal bakery products, or those that are more closely positioned to home baking. For example, in the cakes category, focusing on freshness and the use of more natural ingredients has helped to encourage consumption and mitigate concerns over the ingredients used in shelf-stable or long-life products. In 2012, unpackaged/artisanal cakes led sales in the cakes category, while packaged/industrial cakes continued to decline in both volume and value terms (Euromonitor, January 2013).

According to a Mintel survey from October 2011, the majority of bread users (64%) prefer the flavour of baked-in-store bread over packaged bread. However, only 39% of users agree that it is worth paying more for recently baked bread, and 35% allow sales or promotions to dictate their purchase choice (as shown in the chart below). It appears, therefore, that a sizeable number of consumers continue prioritizing savings over freshness (Mintel, January 2012).

**British Consumer Attitudes Toward Bread and Baked Goods, 2011**




***Source:*** *Mintel, January 2012.*
*Survey of 1,487 bread and bakery users, measuring their level of agreement with the provided statements.*

## MARKET SIZES

Sales of baked goods in the U.K. were valued at US$9.03 billion in 2012, which represents an increase of 5.3% since 2007. Growth over the forecast period is expected to remain healthy, with value sales for the category reaching US$9.8 billion by 2017.

Bread substitutes recorded the largest compound annual growth rate (CAGR) and thus the largest overall growth from 2007 to 2012, at 5% and 27.9%, respectively. This may reflect consumers' increasing interest in versatile products such as naan breads, pitas and wraps.

Cake value sales are forecast to grow an average of 2% each year between 2012 and 2017, representing an increase of 1.5 percentage points over the CAGR recorded from 2007 to 2012. This is most likely due to the fact that cake bars, individually sold slices, and smaller cakes are increasingly tapping into the broader snacking market. These portioned products better equip the cake subcategory to compete with rival sectors such as chocolate confectionery, biscuits and cereal/snack bars (Mintel, May 2013).

**Baked Goods in the U.K. – Retail Value Sales in US$ millions**

| Category | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | Value growth 2007-2012 (%) | |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | CAGR* | Total |
| Baked goods | 8,569.2 | 8,986.8 | 9,069.6 | 9,058.1 | 9,014.9 | 9,026.2 | 1.0 | 5.3 |
| Bread | 4,898.1 | 5,205.8 | 5,241.0 | 5,225.8 | 5,168.9 | 5,122.4 | 0.9 | 4.6 |
| Bread substitutes | 79.9 | 84.2 | 87.6 | 92.0 | 96.5 | 102.2 | 5.0 | 27.9 |
| Packaged/industrial | 3,762.5 | 4,063.5 | 4,093.4 | 4,088.7 | 4,042.5 | 4,000.8 | 1.2 | 6.3 |
| Unpackaged/artisanal | 1,055.6 | 1,058.1 | 1,060.0 | 1,045.1 | 1,029.9 | 1,019.3 | -0.7 | -3.4 |
| Cakes | 2,839.6 | 2,906.4 | 2,927.9 | 2,907.0 | 2,895.0 | 2,909.9 | 0.5 | 2.5 |
| Packaged/industrial | 1,824.9 | 1,881.5 | 1,890.9 | 1,847.4 | 1,808.8 | 1,772.2 | -0.6 | -2.9 |
| Unpackaged/artisanal | 1,014.7 | 1,024.9 | 1,037.0 | 1,059.6 | 1,086.2 | 1,137.6 | 2.3 | 12.1 |
| Pastries | 831.5 | 874.6 | 900.7 | 925.3 | 951.1 | 993.9 | 3.6 | 19.5 |
| Packaged/industrial | 697.3 | 734.5 | 756.7 | 777.1 | 799.2 | 836.4 | 3.7 | 19.9 |
| Unpackaged/artisanal | 134.2 | 140.1 | 144.1 | 148.2 | 151.8 | 157.6 | 3.3 | 17.4 |

**Baked Goods in the U.K. – Forecast Retail Value Sales in US$ millions**

| Category | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | Value growth 2012-2017 (%) | |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | CAGR* | Total |
| Baked goods | 9,026.2 | 9,076.7 | 9,211.6 | 9,383.0 | 9,564.7 | 9,773.6 | 1.6 | 8.3 |
| Bread | 5,122.4 | 5,103.7 | 5,141.0 | 5,189.3 | 5,247.6 | 5,328.4 | 0.8 | 4.0 |
| Bread substitutes | 102.2 | 106.6 | 110.9 | 115.3 | 119.4 | 123.4 | 3.8 | 20.8 |
| Packaged/industrial | 4,000.8 | 3,978.4 | 4,003.1 | 4,036.3 | 4,076.3 | 4,128.0 | 0.6 | 3.2 |
| Unpackaged/artisanal | 1,019.3 | 1,018.7 | 1,027.0 | 1,037.7 | 1,052.0 | 1,077.0 | 1.1 | 5.7 |
| Cakes | 2,909.9 | 2,942.0 | 2,999.8 | 3,076.4 | 3,146.6 | 3,217.1 | 2.0 | 10.6 |
| Packaged/industrial | 1,772.2 | 1,757.7 | 1,766.7 | 1,782.2 | 1,798.4 | 1,815.0 | 0.5 | 2.4 |
| Unpackaged/artisanal | 1,137.6 | 1,184.3 | 1,233.1 | 1,294.1 | 1,348.2 | 1,402.2 | 4.3 | 23.3 |
| Pastries | 993.9 | 1,031.0 | 1,070.9 | 1,117.3 | 1,170.4 | 1,228.0 | 4.3 | 23.6 |
| Packaged/industrial | 836.4 | 869.8 | 906.5 | 949.6 | 998.5 | 1,051.7 | 4.7 | 25.7 |
| Unpackaged/artisanal | 157.6 | 161.1 | 164.4 | 167.6 | 171.9 | 176.3 | 2.3 | 11.9 |

***Source for both:*** *Euromonitor, 2013.*
***CAGR =** compound annual growth rate*

## MARKET SHARE BY COMPANY AND BRAND

By company, Premier Foods Plc. maintained its leading position in the baked goods market in 2012 by a small margin, holding a 13.2% value share. Four of the company's brands (Hovis, Mr Kipling, Lyons Cakes and Mothers Pride), were among the top ten baked good brands by market share. Warburton's Ltd. ranked second in terms of company share, holding 13% of the overall baked goods market in 2012, solely attributable to the company's namesake brand. Associated British Foods Plc (ABF) held the third-largest company share in 2012 with 9.3%, largely due to its Kingsmill brand, which represented the market's third-largest brand share.

Private labels represented 23.5% of all baked good value sales in 2012, a proportion that has fluctuated only slightly since 2007.

**Market Share of Baked Goods in the U.K. by Brand and Company – Retail Sales Value, % Breakdown**

| Brand | Company name | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---|---|---|---|---|---|---|
| Warburtons | Warburtons Ltd | 11.4 | 12.3 | 13.2 | 13.0 | 13.1 | 13.0 |
| Hovis | Premier Foods Plc | 10.0 | 10.3 | 9.8 | 9.6 | 9.5 | 9.4 |
| Kingsmill | Associated British Foods Plc (ABF) | 6.2 | 7.4 | 7.5 | 7.6 | 7.9 | 8.0 |
| Mr Kipling | Premier Foods Plc | 2.4 | 2.6 | 2.5 | 2.4 | 2.3 | 2.2 |
| Weight Watchers | Weight Watchers International Inc | 1.0 | 1.1 | 1.0 | 1.0 | 0.9 | 0.9 |
| Cadbury | Mondelez International, Inc | - | - | - | - | - | 0.8 |
| Braces | Braces Bakery Ltd | 0.7 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 |
| Roberts | Frank Roberts & Sons Ltd | 0.8 | 0.8 | 0.9 | 0.8 | 0.7 | 0.7 |
| Lyons Cakes | Premier Foods Plc | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.6 |
| Mothers Pride | Premier Foods Plc | 0.5 | 0.6 | 0.6 | 0.5 | 0.5 | 0.5 |
| Lightbody | Lightbody Celebration Cakes Ltd | 0.5 | 0.5 | 0.4 | 0.5 | 0.5 | 0.4 |
| Ryvita | Associated British Foods Plc (ABF) | 0.3 | 0.3 | 0.4 | 0.4 | 0.4 | 0.4 |
| Allinson | Associated British Foods Plc (ABF) | 0.5 | 0.5 | 0.4 | 0.4 | 0.4 | 0.4 |
| Soreen Malt Loaf | McCambridge Group Plc | - | 0.3 | 0.3 | 0.3 | 0.3 | 0.4 |
| Go Ahead! | United Biscuits (Holdings) Plc | 0.2 | 0.2 | 0.2 | 0.2 | 0.3 | 0.3 |
| Bürgen | Associated British Foods Plc (ABF) | 0.3 | 0.3 | 0.2 | 0.2 | 0.2 | 0.2 |
| Mission | Mission Foods Corp | 0.1 | 0.1 | 0.1 | 0.2 | 0.2 | 0.2 |
| Fabulous Bakin' Boys | Fabulous Bakin' Boys Ltd | 0.2 | 0.3 | 0.3 | 0.3 | 0.2 | 0.2 |
| Discovery | Discovery Foods Ltd | 0.1 | 0.1 | 0.1 | 0.2 | 0.2 | 0.2 |
| Nimble | Premier Foods Plc | 0.3 | 0.3 | 0.3 | 0.2 | 0.2 | 0.2 |
| McVitie's | United Biscuits (Holdings) Plc | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 |
| Entenmann's | Grupo Bimbo SAB de CV | - | - | 0.2 | 0.2 | 0.2 | 0.2 |
| Galaxy/Dove | Mars Inc | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.2 |
| Rathbone | Rathbone Bakery Ltd | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 |
| Rolo | Nestlé SA | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 |
| Jaffa Cakes | United Biscuits (Holdings) Plc | 0.1 | 0.2 | 0.1 | 0.2 | 0.1 | 0.1 |
| Sunblest | Associated British Foods Plc (ABF) | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 |
| Cadbury | Kraft Foods Inc | - | - | - | 0.8 | 0.8 | - |
| Cadbury | Cadbury Plc | - | 0.8 | 0.8 | - | - | - |
| Entenmann's | George Weston Ltd | 0.2 | 0.2 | - | - | - | - |
| Cadbury | Cadbury Schweppes Plc | 0.9 | - | - | - | - | - |
| Soreen Malt Loaf | Inter Link Foods Plc | 0.2 | - | - | - | - | - |
| Artisanal | Artisanal | 25.7 | 24.7 | 24.7 | 24.9 | 25.2 | 25.6 |
| Private Label | Private Label | 23.8 | 24.1 | 23.4 | 23.3 | 23.5 | 23.5 |
| Others | Others | 12.1 | 9.9 | 10.2 | 10.8 | 10.3 | 10.0 |

***Source:*** *Euromonitor, 2013.*

## DISTRIBUTION CHANNELS

Grocery retailers accounted for 96.9% of baked good sales by value in 2012. The country's top grocery retailers, Tesco, Sainsbury, Walmart and Morrisons, are primary channels for sales of baked goods, due to their overall dominance in the market. According to a Mintel survey, 80% of shoppers visit one of these four retailers for their weekly grocery shopping. Discount promotions, extensive selections, and wide private label ranges make these larger retailers the preferred choice for grocery shoppers, particularly in uncertain economic times.

**Sales of Baked Goods in the U.K. by Distribution Format**
**% Retail Sales Value**

| Format | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---|---|---|---|---|---|
| Store-based retailing | 97.8 | 97.5 | 97.3 | 97.2 | 97.1 | 96.9 |
| Grocery retailers | 97.8 | 97.5 | 97.3 | 97.2 | 97.1 | 96.9 |
| Supermarkets | 39.6 | 39.5 | 39.3 | 39.0 | 38.8 | 38.7 |
| Hypermarkets | 36.5 | 37.3 | 37.7 | 38.0 | 38.5 | 38.7 |
| Discounters | 1.7 | 2.1 | 2.3 | 2.4 | 2.1 | 2.0 |
| Small grocery retailers | 11.5 | 13.0 | 12.9 | 12.7 | 12.8 | 12.8 |
| Convenience stores | 5.0 | 6.7 | 7.0 | 7.1 | 7.2 | 7.3 |
| Independent small grocers | 4.5 | 4.2 | 3.7 | 3.3 | 3.2 | 3.1 |
| Forecourt retailers | 2.0 | 2.2 | 2.3 | 2.3 | 2.3 | 2.4 |
| Other grocery retailers | 8.5 | 5.6 | 5.1 | 5.0 | 4.9 | 4.8 |
| Non-store retailing | 2.2 | 2.5 | 2.7 | 2.8 | 3.0 | 3.1 |
| Internet retailing | 2.2 | 2.5 | 2.7 | 2.8 | 3.0 | 3.1 |

***Source:*** *Euromonitor, 2013.*

**Top Grocery Retailers in the U.K., 2012**

| Company | Number Of Outlets | Total Grocery Market Share % |
|---|---|---|
| Tesco | 3,141 | 17.00 |
| Sainsbury | 1,106 | 9.36 |
| Walmart (Asda) | 564 | 8.16 |
| Morrisons | 498 | 6.46 |
| Co-operative Group | 4,530 | 4.01 |

***Source:*** *Planet Retail, 2013.*

## NEW PRODUCT LAUNCHES

According to the Mintel Global New Products Database (GNPD), the British market saw the introduction of 843 baked good products within the year of July 2012 to July 2013. Of these new launches, 67% (562 products) were from the cakes, pastries and sweet goods sub-category, while the remaining 33% (281 products) fell under the bread and bread products sub-group.

**New Launches of Baked Goods in the U.K., July 2012 to July 2013, by Subcategory and Features**

| Cakes, Pastries and Sweet Goods | | | Bread and Bread Products | | |
|---|---|---|---|---|---|
| **Feature** | **Launch count** | **Percent of total** | **Feature** | **Launch count** | **Percent of total** |
| **Top five flavours (including blends)** | | | | | |
| Chocolate (unspecified) | 83 | 14.8% | Unflavoured/plain | 180 | 18.6% |
| Unflavoured/plain | 46 | 8.2% | Garlic | 15 | 13.3% |
| Lemon | 23 | 4.1% | Garlic and coriander/cilantro | 9 | 7.5% |
| Fruit | 18 | 3.2% | Butter | 6 | 4.0% |
| Strawberry | 13 | 2.3% | Garlic and herb/herbal | 5 | 3.5% |
| **Top ten claims*** | | | | | |
| Vegetarian | 307 | 54.6% | Vegetarian | 222 | 79.0% |
| Ethical - environmentally friendly package | 191 | 34.0% | No additives/preservatives | 75 | 26.7% |
| No additives/preservatives | 128 | 22.8% | Ethical - environmentally friendly package | 53 | 18.9% |
| Seasonal | 119 | 21.2% | Low/no/reduced transfat | 34 | 12.1% |
| Low/no/reduced transfat | 71 | 12.6% | Premium | 33 | 11.7% |
| Premium | 57 | 10.1% | Economy | 31 | 11.0% |
| Microwaveable | 39 | 6.9% | Ease of use | 29 | 10.3% |
| Low/no/reduced allergen | 33 | 5.9% | Wholegrain | 29 | 10.3% |
| Economy | 33 | 5.9% | Social media | 28 | 10.0% |
| Slimming | 30 | 5.3% | Low/no/reduced fat | 26 | 9.3% |
| **Top five package types** | | | | | |
| Flexible | 384 | 68.3% | Flexible | 223 | 79.4% |
| Carton | 57 | 10.1% | Flexible sachet | 37 | 13.2% |
| Clam-pack | 44 | 7.8% | Skinpack | 8 | 2.8% |
| Tub | 40 | 7.1% | Tray | 5 | 1.8% |
| Tray | 34 | 6.0% | Flexible stand-up pouch | 4 | 1.4% |
| **Manufacturer type** | | | | | |
| Private label | 326 | 58.0% | Private label | 115 | 40.9% |
| Branded | 236 | 42.0% | Branded | 166 | 59.1% |

***Source:*** *Mintel GNPD, 2013.*
** Please note that the totals for the count and percentage of products launched by claim will add to more than 562 and 281 (100%), as products can use multiple claims.*

## NEW PRODUCT EXAMPLES

The top three claims used by the 843 new product launches within both baked good subcategories (cakes, pastries and sweet goods; bread and bread substitutes) were “vegetarian,” “ethical – environmentally friendly package,” and “no additives/preservatives” (as shown on page 6) The following are some examples of products launched between July 2012 and July 2013 that used these claims, from Mintel GNPD.

### “Vegetarian” claim

The “vegetarian” claim was used by 63% (529) of the total new baked good launches, and was the most frequent claim used within each of the product subcategories.

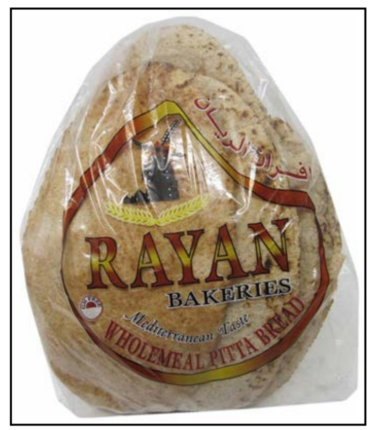
#### Chocolate Chip Mini Muffins

| | | | |
|---|---|---|---|
| Company: | Tesco | Price in US$: | 2.38 |
| Brand: | Tesco | Package: | Tub |
| Date: | July 2013 | Size: | 12 muffins |

Claims: Vegetarian, ethical – environmentally friendly package.

Tesco Chocolate Chip Mini Muffins have been reformulated with an improved recipe and contain milk chocolate.

#### Wholemeal Pita Bread




| | | | |
|---|---|---|---|
| Company: | Rayan Bakeries | Price in US$: | 2.07 |
| Brand: | Rayan Bakeries | Package: | Flexible |
| Date: | July 2013 | Size: | 5 pita breads |

Claims: GMO (genetically modified organism)-free, low/no/reduced fat, low/no/reduced sodium, wholegrain microwaveable, no additives/preservatives, no animal ingredients, vegan, vegetarian.

This GMO-free vegan product has no added fat, is low in salt, contains no artificial colouring or flavouring, and can be used in a variety of ways for meals, dips and spreads.

#### Caramel Shortcakes

| | | | |
|---|---|---|---|
| Company: | Asda | Price in US$: | 2.54 |
| Brand: | Asda Chosen by You | Package: | Clam-pack |
| Date: | July 2013 | Size: | 22 units |

Claims: Ethical – environmentally friendly package, low/no/reduced transfat, no additives/preservatives, vegetarian.


These are crunchy, bite-sized biscuits topped with caramel and a thick layer of milk chocolate. This vegetarian product contains no artificial colours, flavours or hydrogenated fat, and retails in a recyclable pack.

***Source for all:** Mintel GNPD, 2013.*

## “Ethical – environmentally friendly package” claim

The “ethical – environmentally friendly package” claim was used by 29% (244) of the total new baked good launches. It was the second-most frequent claim used by new cakes, pastries and sweet goods, and the third-most popular within the bread and bread products subcategory.

### Bramley Apple Crumble

| | | | |
|---|---|---|---|
| Company: | Asda | Price in US$: | 3.66 |
| Brand: | Asda Chosen by You | Package: | Tray |
| Date: | January 2013 | Size: | 600 g |

Claims: Ethical – environmentally friendly package, low/no/reduced transfat, microwaveable, no additives/preservatives, vegetarian.


This microwaveable product is comprised of tangy Bramley apples topped with a butter-rich oat crumble. This product contains no artificial colours, flavours or hydrogenated fat, and retails in a partly recyclable package.

### Farmhouse Cheddar Cheese Scones

| | | | |
|---|---|---|---|
| Company: | Sainsbury’s | Price in US$: | 2.37 |
| Brand: | Sainsbury’s Taste the Difference | Package: | Flexible |
| Date: | February 2013 | Size: | 280 g |

Claims: Ethical – environmentally friendly package, premium, vegetarian.


This premium product is suitable for vegetarians and retails in a partly recyclable pack containing four scones.

### Dough Balls with Garlic and Parsley Dip

| | | | |
|---|---|---|---|
| Company: | Tesco | Price in US$: | 3.18 |
| Brand: | Tesco Big Night In | Package: | Flexible |
| Date: | July 2013 | Size: | 260 g |

Claims: Ethical – environmentally friendly package, vegetarian.


They can be served as a starter, as a snack or at a party. This product is suitable for vegetarians and retails in a newly designed, partially recyclable package, containing 20 units.

***Source for all:*** *Mintel GNPD, 2013.*

## “No additives/preservatives” claim

The “no additives/preservatives” claim was used by 24% (203) of the total new baked good launches. It was the third-most frequent claim used by new cakes, pastries and sweet goods, and the second-most popular within the bread and bread products subcategory.

### Blackcurrant Sundaes

| | | | |
|---|---|---|---|
| Company: | Marks & Spencer | Price in US$: | 3.32 |
| Brand: | Marks & Spencer | Package: | Carton |
| Date: | December 2012 | Size: | 205 g |

Claims: Ethical – environmentally friendly package, no additives/preservatives.

This product contains no artificial colours or flavourings and retails in a recyclable package.


### Italian Style Ciabatta Rolls

| | | | |
|---|---|---|---|
| Company: | Aldi | Price in US$: | 0.76 |
| Brand: | Cucina | Package: | Flexible |
| Date: | July 2013 | Size: | 2 buns |

Claims: No additives/preservatives, vegetarian.

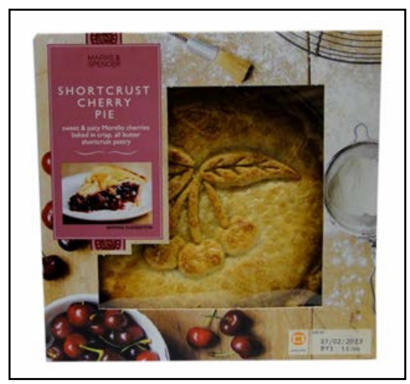
Cucina Italian Style Ciabatta Rolls are free from artificial colours, flavours and preservatives. This vegetarian product retails in a package containing two units.


### Shortcrust Cherry Pie

| | | | |
|---|---|---|---|
| Company: | Marks & Spencer | Price in US$: | 4.43 |
| Brand: | Marks & Spencer | Package: | Carton |
| Date: | March 2013 | Size: | 540 g |

Claims: Ethical – environmentally friendly package, no additives/preservatives, vegetarian.

This product is said to feature sweet and juicy Morello cherries baked in crisp, all-butter shortcrust pastry. Suitable for vegetarians, the product contains no artificial colours, flavourings or preservatives and retails in a recyclable package.




***Source for all:*** *Mintel GNPD, 2013.*

## TRADE DATA

The U.K. imported just under US$2.3 billion worth of bread, pastries, sweet biscuits and other baked goods from the world in 2012. Canada's share of this market was 0.7% with a value of US$16.4 million, representing a 25% increase in value from the previous year.

**U.K. Imports of Commodity 1905: Pastry, Cakes, Biscuits and Other Bakers' Wares, Whether or Not Containing Cocoa; Communion Wafers, Empty Cachets For Pharmaceutical Use Sealing Wafers, Rice Paper and Similar Products**

| Top 10 Partner Countries | US$ | | | % Share | | |
|---|---|---|---|---|---|---|
| | 2010 | 2011 | 2012 | 2010 | 2011 | 2012 |
| World | 1,831,578,983 | 1,977,728,723 | 2,257,259,797 | 100.00 | 100.00 | 100.00 |
| Germany | 411,429,948 | 411,407,069 | 490,999,016 | 22.46 | 20.80 | 21.75 |
| France | 278,707,437 | 343,331,124 | 378,166,065 | 15.22 | 17.36 | 16.75 |
| Ireland | 216,680,691 | 227,906,975 | 282,977,500 | 11.83 | 11.52 | 12.54 |
| Belgium | 268,550,022 | 250,929,139 | 272,829,300 | 14.66 | 12.69 | 12.09 |
| Netherlands | 204,915,732 | 234,089,458 | 253,149,349 | 11.19 | 11.84 | 11.21 |
| Italy | 89,963,953 | 108,723,787 | 114,496,583 | 4.91 | 5.50 | 5.07 |
| Spain | 79,589,332 | 100,449,892 | 97,157,132 | 4.35 | 5.08 | 4.30 |
| Denmark | 52,079,595 | 42,298,207 | 81,350,396 | 2.84 | 2.14 | 3.60 |
| Poland | 48,999,829 | 52,468,085 | 57,193,910 | 2.68 | 2.65 | 2.53 |
| United States | 13,682,771 | 18,851,762 | 26,985,076 | 0.75 | 0.95 | 1.20 |
| Canada (15th) | 11,936,673 | 13,132,733 | 16,375,718 | 0.65 | 0.66 | 0.73 |

The U.K. imported slightly over US$696 million worth of food products for use in baked good preparation from the world in 2012. Canada's share of this market was 0.08% with a value of US$527,050 representing an 81% decline in value from the previous year.

**U.K. Imports of Commodity: 1901, Malt Extract; Food Preparations Of Flour, Meal Etc. Containing Under 40% Cocoa; Food Preparations Of Milk, etc. Containing Under 50% Cocoa**

| Top 10 Partner Countries | US$ | | | % Share | | |
|---|---|---|---|---|---|---|
| | 2010 | 2011 | 2012 | 2010 | 2011 | 2012 |
| World | 542,397,219 | 676,292,030 | 696,041,985 | 100.00 | 100.00 | 100.00 |
| Ireland | 251,588,979 | 312,005,616 | 387,101,059 | 46.38 | 46.13 | 55.61 |
| France | 80,634,851 | 74,243,290 | 86,544,546 | 14.87 | 10.98 | 12.43 |
| Germany | 66,011,967 | 72,773,810 | 70,793,066 | 12.17 | 10.76 | 10.17 |
| Netherlands | 38,523,056 | 30,450,969 | 33,270,796 | 7.10 | 4.50 | 4.78 |
| Belgium | 20,258,478 | 89,300,546 | 24,146,710 | 3.73 | 13.20 | 3.47 |
| United States | 22,911,388 | 23,969,403 | 18,557,517 | 4.22 | 3.54 | 2.67 |
| Spain | 11,092,844 | 13,990,452 | 16,577,123 | 2.05 | 2.07 | 2.38 |
| Austria | 2,075,485 | 5,330,057 | 8,571,407 | 0.38 | 0.79 | 1.23 |
| Italy | 5,279,866 | 6,709,516 | 8,144,383 | 0.97 | 0.99 | 1.17 |
| Poland | 3,821,050 | 6,285,474 | 6,419,175 | 0.70 | 0.93 | 0.92 |
| Canada (23rd) | 1,876,763 | 2,823,999 | 527,050 | 0.35 | 0.42 | 0.08 |

***Source for both:*** *Global Trade Atlas, 2013.*

## RESOURCES


Euromonitor (2013). Packaged food data.

Euromonitor (January 2013). Category Insights: Baked Goods in the United Kingdom

Planet Retail (2013).

Mintel Global New Products Database [GNPD] (2013).

Mintel (May 2013). Cakes and Cake Bars—United Kingdom.

Mintel (January 2012). Bread and Baked Goods—United Kingdom.


**Consumer Trends: Breads, Cakes and Pastries in the United Kingdom**


ISSN 2292-0676
AAFC No. **12159E**

**Photo Credits**



For additional copies, to request an alternate format, and for all other inquiries regarding this publication, please contact:

Agriculture and Agri-Food Canada, Global Analysis Division
1341 Baseline Road, Tower 5, 4th floor
Ottawa, ON
Canada K1A 0C5
E-mail: infoservice@agr.gc.ca

Aussi disponible en français sous le titre :
**Tendances de consommation : Pains, gâteaux et pâtisseries au Royaume-Uni**

The Government of Canada has prepared this report based on primary and secondary sources of information. Although every effort has been made to ensure that the information is accurate, Agriculture and Agri-Food Canada (AAFC) assumes no liability for any actions taken based on the information contained herein.



Agriculture and Agri-Food Canada provides this document and other report services to agriculture and food industry clients free of charge.