



**MARKET ACCESS SECRETARIAT
Global Analysis Report**

Sector Trend Analysis

Dough Products

November 2017



Executive summary

- From 2007 to 2016, dough product launches grew at a growth rate of 7% while at the same time the retail market size of bakery products worldwide increased at a growth rate of 4% (2007 to 2016), amounting to US\$326 billion in 2016.
- During the ten-year review period (2007 to 2016), there were 2,230 dough products launched in the world. Over 75% of the dough products launched were new product introductions, while 25% were relaunched products.
- Europe was the most dynamic region for both finished goods and value-added bakery products. During the ten-year review period (2007 to 2016), the region launched the most dough products in the world and continued to see the highest retail sales for bakery products in the world.
- The fastest growing claims for dough products during the review period from 2007 to 2016 were vegetarian, economy, GMO-free, no additives/preservatives, and ease of use.
- General Mills, Nestlé, and Lidl were the top companies to launch dough products from 2007 to 2016.

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Introduction

Around the world, dough products are increasing in availability as the market size of bakery products increases. From 2007 to 2016, dough products grew at a growth rate of 7% while at the same time the retail market size of bakery products grew at a compound annual growth rate of 4%, amounting to US\$326 billion in 2016.

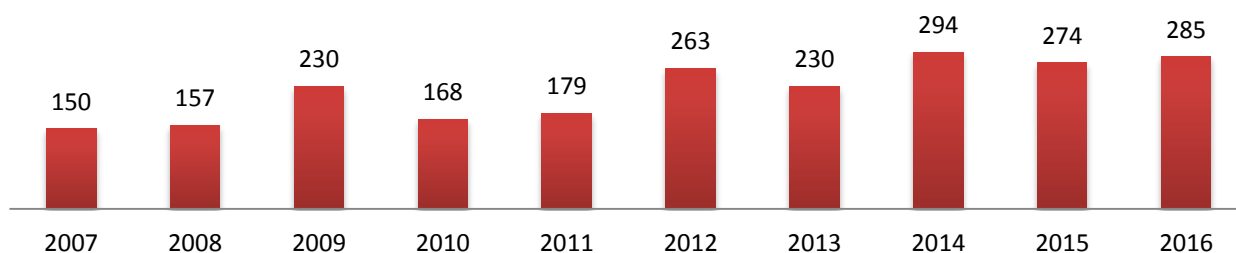
As consumers continue to lead busy lifestyles, there is an ongoing demand for convenient and easy-to-use bakery products. This is mainly significant in European countries where sales of bakery products are highly influenced by the growing demand for convenience (Euromonitor, 2017).

Although there is continued growth for bakery products, consumers across the world are interested in product offerings with greater health options that are nutritious, gluten-free (specifically in North America and Europe), and natural (with high avoidance of artificial ingredients). In addition, consumers want a wider variety of bakery products. This is specific to Latin American countries such as Brazil, where consumers want more sophisticated products with exotic ingredients, different flavours, sizes, and alternative product formats (Euromonitor, 2016).

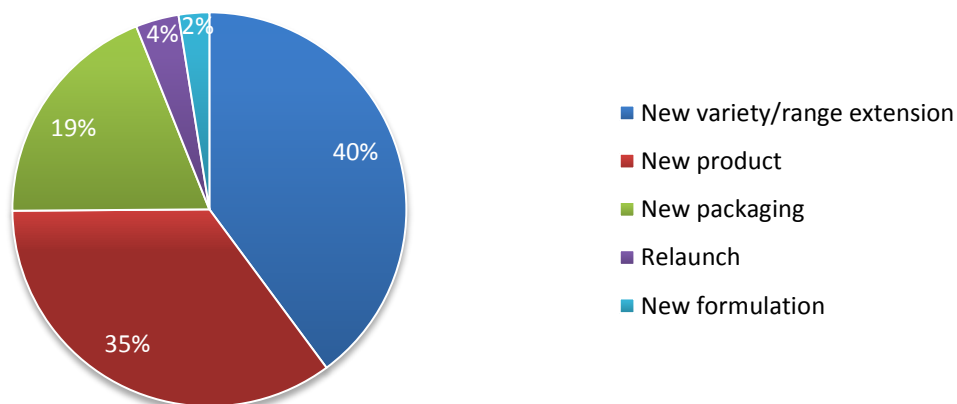
Dough product launch analysis

From 2007 to 2016, there were 2,230 dough products launched in the world. Over 75% of the dough products launched were new product introductions, while 25% were relaunches. Of the products that were new introductions 35% were a range/variety extension to an existing product line/brand. Relaunch dough products consist of existing products that saw a change in packaging.

Dough products launched from 2007 to 2016



Dough products launched type, from 2007 to 2016



Source for both: Mintel, 2017.



Product launch by category

From 2007 to 2016, about 90% of dough products were launched in the baking ingredients and mixes category, which amounted to 2,000 dough products in the review period (2007 to 2016). The remaining categories were bread and bread products (6.4%), cakes, pastries and sweet goods (1.9%), and savoury biscuits/crackers (1.1%). This trend was represented across all regions in the world.

Dough product launches by bakery category from 2007 to 2016

Category	Number of products
Baking ingredients and mixes	2,000
Bread and bread products	142
Cakes, pastries & sweet goods	42
Savoury biscuits/crackers	25
Sweet biscuits/cookies	21
Total	2,230

Source: Mintel, 2017.

The common types of dough products launched included the following:

Cookie dough

From 2007 to 2016, there were 712 cookie dough products launched in the world, most of which occurred in 2008 and 2012. About 70% of the cookie dough launches occurred in North America, 16% in Europe, and 10.5% in Asia Pacific. The United States accounted for 62.5% of cookie dough launches, followed by Canada with 7.2%, and Japan with 6.6%.

Pizza dough

From 2007 to 2016, there were 656 pizza dough products launched in the world. Most of the pizza dough product launches that occurred were new products, while 21% were relaunches. Over 71% of pizza dough products were launched in Europe, most of which occurred in Italy (103 products), France (74 products), and Germany (55 products). Outside of Europe, Brazil saw 55 dough product launches, followed by the United States with 44 products, and Argentina with 30 products.

Puff pastry dough

From 2007 to 2016, there were 312 puff pastry dough products launched in the world, most of which occurred in the middle of the review period and slowly declined at the end of the review period (2007 to 2016). A majority of the puff pastry dough products were new product launches, while 25% were relaunches. Over 69% of puff pastry dough products were launched in Europe and 25% in Latin America. Launches in Italy, Argentina, and Germany made up 51% of puff pastry launches in the world.

Laminated dough

From 2007 to 2016, there were 13 laminated dough products launched in the world. Most of the dough product launches were due to new packaging, followed by four entirely new product launches and one range/variety extension. These types of dough products occurred in the baking ingredients and mixes and cakes, pastries and sweet goods categories. Most of the laminated dough products were launched in Brazil within the last two years (2015 to 2016) and 31% were launched in the United States in 2007.



Product launch by region

Dough product launches and bakery sales by regions

Region	Dough product launches (2007 to 2016)	Bakery retail sales (2016)**	Bakery retail sales CAGR* (2012-2016)
World	2,230	326,564.6	4.0%
Europe	989	123,205.8	1.8%
Latin America	609	54,441.3	7.8%
North America	512	62,888.2	2.1%
Asia Pacific	74	65,403.7	5.8%
Middle East & Africa	46	20,625.6	10.6%

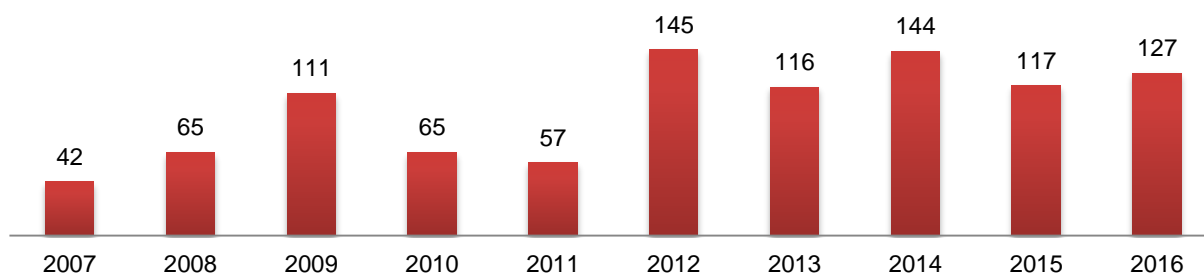
Source: Mintel & Euromonitor, 2017.

*CAGR- compound annual growth rate

**Note: Value is in US\$ millions.

Europe

Product launches by year in Europe, from 2007 to 2016



Source: Mintel, 2017.

Europe is the most dynamic region for both finished goods and value-added bakery products. During the ten-year review period (2007 to 2016), the region launched the most dough products in the world and experienced the highest retail sales for bakery products in the world.

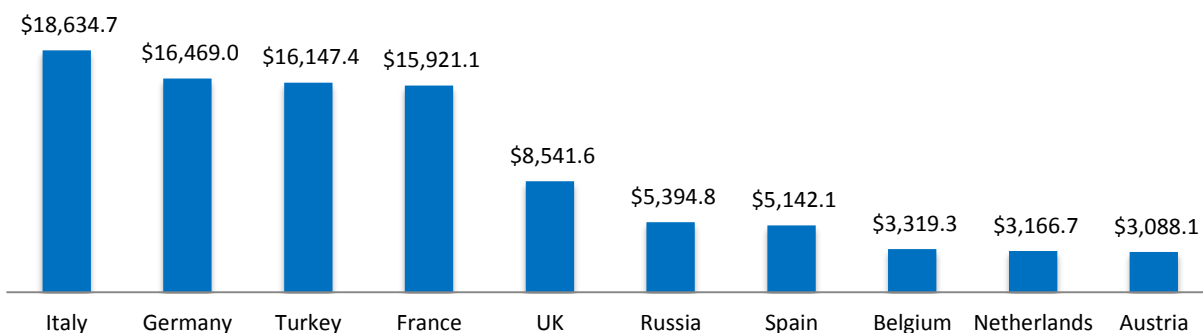
From 2007 to 2016, there were 989 dough products launched in the region, which accounted for 44% of the dough products launched in the world. Most of the product launches were new product introductions while a small portion was relaunched. The region saw a significant increase of dough products from 2007 to 2016. In 2007 there were 42 product launches while in 2016 there were 127 products launched. This indicates a growing trend for baking ingredients and mixes in the region.

The retail sale of bakery products in the region was worth US\$123.2 billion in 2016. The sector saw a compound annual growth rate of 1.8% from 2012 to 2016 and accounted for 39% of the world retail sales of bakery products. Sales in Western Europe made up 84% of the region's retail sales, while those in Eastern Europe made up 16% of the sector.

In 2021, the region's forecasted retail sale is expected to rise to US\$151.1 billion with a compound annual growth rate of 4.2% from 2012 to 2016. Although the category continues to witness significant sales, it has been losing market share to regions such as Latin America, Africa and the Middle East.



Retail sales of Europe's top ten bakery markets in 2016, US\$ millions



Historical retail sales of bakery products by category sold in Europe in US\$ millions, From 2012 to 2016

Categories	2012	2013	2014	2015	2016	CAGR* 2012-16
Total	114,909.3	116,287.2	117,485.2	119,652.5	123,205.8	1.8%
Bread	78,403.9	79,052.9	79,690.3	81,132.2	84,011.5	1.7%
Cakes	21,081.2	21,417.7	21,650.4	22,056.5	22,454.4	1.6%
Pastries	12,860.4	13,174.5	13,399.2	13,624.9	13,825.0	1.8%
Frozen baked goods	1,594.1	1,647.7	1,725.3	1,807.2	1,862.4	4.0%
Dessert mixes	969.7	994.4	1,020.0	1,031.7	1,052.5	2.1%

Forecasted retail sales of bakery products by category sold in Europe in US\$ millions, from 2017 to 2021

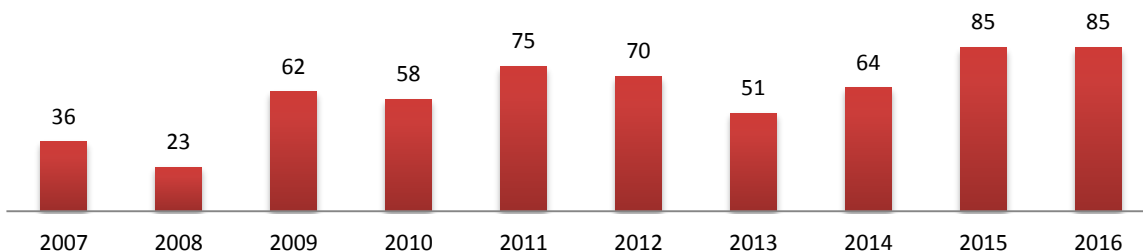
Categories	2017	2018	2019	2020	2021	CAGR* 2017-21
Total	127,990.6	133,139.9	138,674.9	144,691.4	151,072.2	4.2%
Bread	87,652.5	91,593.7	95,800.5	100,397.6	105,302.9	4.7%
Cakes	23,046.8	23,730.5	24,469.3	25,260.1	26,068.6	3.1%
Pastries	14,287.2	14,702.4	15,178.3	15,690.7	16,236.7	3.2%
Frozen baked goods	1,921.4	1,998.3	2,077.1	2,157.9	2,241.7	3.9%
Dessert mixes	1,082.7	1,115.0	1,149.7	1,185.1	1,222.3	3.1%

Source for all: Euromonitor, 2017.

*CAGR-Compound annual growth rate

Latin America

Product launches by year in Latin America, from 2007 to 2016



Source: Mintel, 2017.

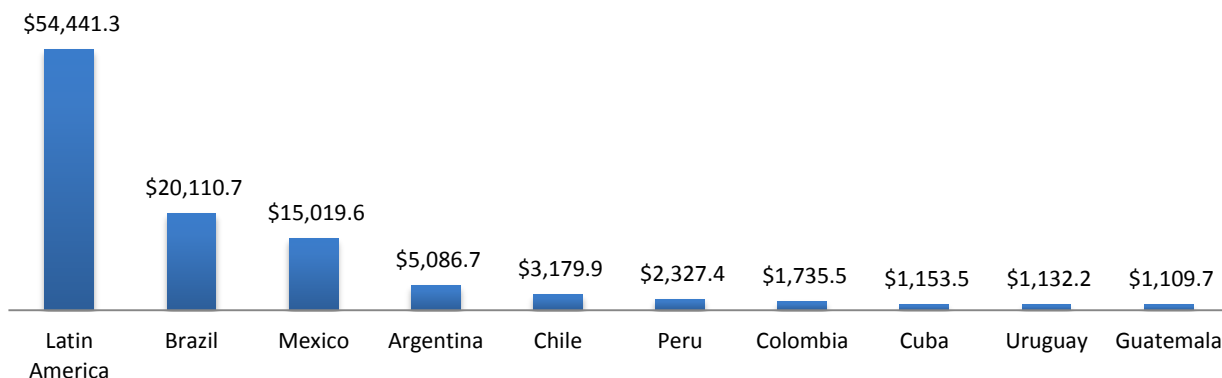


Latin America ranks second in terms of the most dough products launched in the world. However, this region was ranked fourth in the world based on retail sales of bakery products.

From 2007 to 2016, there were 609 dough products launched, most of which were new products, range/variety extension, and new packaging. The introduction of dough products increased from 36 products in 2007 to 85 products in 2016.

The retail value of bakery products in the region was worth US\$54.4 billion in 2016 and witnessed the highest compound annual growth rate of 7.8% from 2012 to 2016. Latin America accounted for 17.4% of the world retail sales of bakery products. In 2021, the region's forecasted retail sales are expected to amount to US\$76.4 billion at a compound annual growth rate of 7% from 2017 to 2021.

Retail sales of Latin America's top ten bakery markets in 2016, US\$ millions



Historical retail sales of bakery products by category sold in Latin America in US\$ millions, From 2012 to 2016

Categories	2012	2013	2014	2015	2016	CAGR* 2012-16
Total	40,375.5	43,939.1	47,142.7	50,371.8	54,441.3	7.8%
Bread	30,247.2	32,843.4	35,490.5	38,026.9	41,026.9	7.9%
Pastries	4,711.0	5,178.2	5,249.9	5,545.2	6,082.8	6.6%
Cakes	4,422.1	4,804.5	5,163.8	5,430.6	5,778.4	6.9%
Dessert mixes	874.9	964.3	1,056.5	1,155.5	1,306.3	10.5%
Frozen baked goods	120.3	148.7	182.0	213.6	246.9	19.7%

Forecast retail sales of bakery products by category sold in Latin America in US\$ millions, From 2017 to 2021

Categories	2017	2018	2019	2020	2021	CAGR* 2017-21
Total	58,548.5	62,786.2	67,161.7	71,605.1	76,413.4	6.9%
Bread	43,795.1	46,577.1	49,495.8	52,492.7	55,743.1	6.2%
Pastries	6,742.6	7,452.6	8,149.6	8,831.2	9,550.3	9.1%
Cakes	6,270.2	6,820.5	7,385.7	7,958.4	8,601.0	8.2%
Dessert mixes	1,459.4	1,619.9	1,779.5	1,936.6	2,095.3	9.5%
Frozen baked goods	281.2	316.1	351.1	386.2	423.7	10.8%

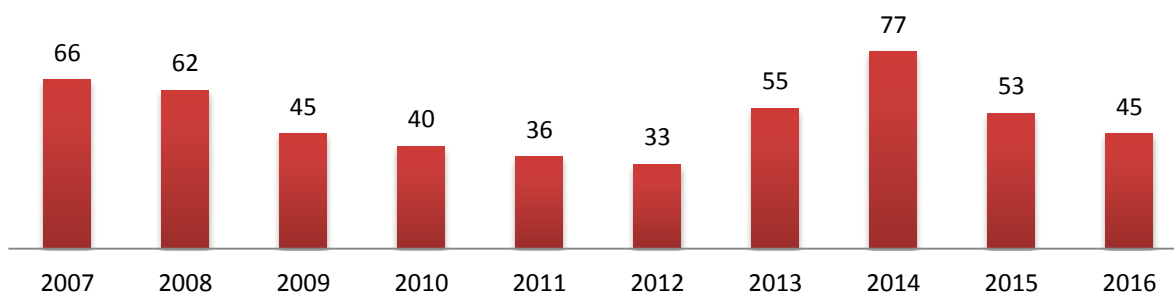
Source for all: Euromonitor, 2017.

*CAGR-Compound annual growth rate



North America

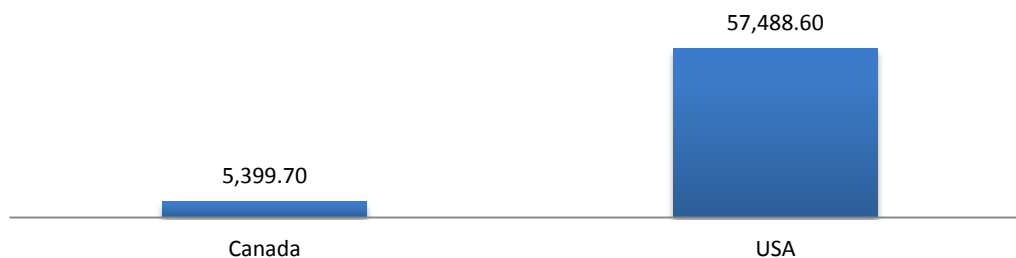
Product launches by year in North America, from 2007 to 2016



North America ranks third both in terms of most dough products launched and the largest retail sales market for bakery products. From 2007 to 2016, there were 512 product launches, most of which were new product introduction.

In 2016, North America's bakery products sales amounted to US\$62.9 billion at a compound annual growth rate of 2.1% (2012 to 2016). The region's bakery sales made up 20% of the world's bakery sales. Retail sales are expected to increase to US\$73.4 billion by 2021 at a compound annual growth rate of 3.2% from 2017 to 2021.

Retail sales by North American countries in 2016, US\$ millions



Historical retail sales of bakery products by category sold in North America in US\$ millions, from 2012 to 2016

Categories	2012	2013	2014	2015	2016	CAGR* 2012-16
Total	57,875.4	59,617.2	60,560.3	61,556.6	62,888.2	2.1%
Bread	25,343.8	26,085.0	26,155.3	26,310.8	26,471.0	1.1%
Cakes	15,413.2	15,606.5	16,133.4	16,655.5	17,319.0	3.0%
Pastries	12,841.3	13,591.6	14,021.3	14,495.5	15,051.6	4.1%
Frozen baked goods	2,483.7	2,512.8	2,526.1	2,502.4	2,515.1	0.3%
Dessert mixes	1,793.4	1,821.3	1,724.2	1,592.4	1,531.5	-3.9%

Source for all: Euromonitor, 2017.

*CAGR-Compound annual growth rate

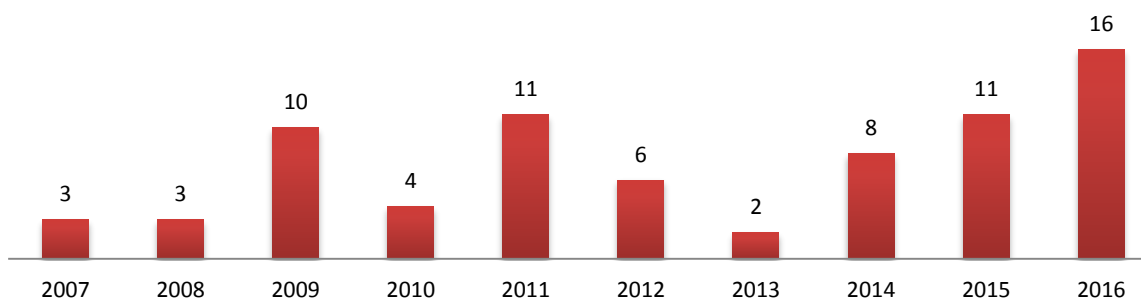


Forecast retail sales of bakery products by category sold in North America in US\$ millions, from 2017 to 2021

Categories	2017	2018	2019	2020	2021	CAGR* 2017-21
Total	64,806.7	66,886.6	68,958.3	71,161.6	73,433.4	3.2%
Bread	27,216.6	28,024.2	28,770.3	29,626.8	30,525.8	2.9%
Cakes	17,929.6	18,583.3	19,252.7	19,931.4	20,617.1	3.6%
Pastries	15,526.4	16,041.6	16,577.0	17,110.8	17,654.1	3.3%
Frozen baked goods	2,595.5	2,674.4	2,768.8	2,869.5	2,977.4	3.5%
Dessert mixes	1,538.6	1,563.1	1,589.5	1,623.1	1,659.0	1.9%

Asia Pacific

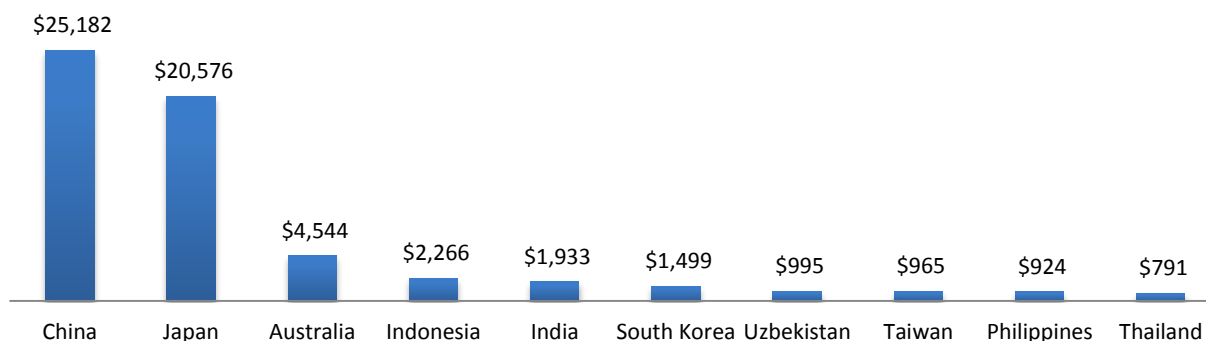
Product launches by year in Asia Pacific, from 2007 to 2016



The Asia Pacific regions ranks fourth in terms of the most dough product launches and second in terms of most bakery sales in the world. From 2007 to 2016, there were 74 products launched, most of which were new product launches.

The retail sales of bakery products amounted to US\$65.4 billion in 2016 at a compound annual growth rate of 5.8% from 2012 to 2016. The region's bakery sales made up 21% of the world's retail sales of bakery products. Retail sales are forecasted to increase to US\$85.4 billion by 2021 at a compound annual growth rate of 5.5% from 2017 to 2021.

Retail sales of Asia Pacific's top ten bakery markets in 2016, US\$ millions



Source for all: Euromonitor, 2017



Historical retail sales of bakery products by category sold in Asia Pacific in US\$ millions, from 2012 to 2016

Categories	2012	2013	2014	2015	2016	CAGR* 2012-16
Total	52,130.4	55,044.0	58,687.7	61,935.6	65,403.7	5.83%
Cakes	20,490.2	21,594.9	22,817.6	23,894.1	25,211.9	5.30%
Pastries	15,511.9	16,350.5	17,551.9	18,781.7	19,950.9	6.50%
Bread	15,237.3	16,140.2	17,291.0	18,175.6	19,098.5	5.80%
Dessert mixes	706.8	772.5	840.1	897.6	953.3	7.80%
Frozen baked goods	184.2	185.9	187.1	186.6	189.1	0.70%

Forecasted retail sales of bakery products by category sold in Asia Pacific in US\$ millions, from 2017 to 2021

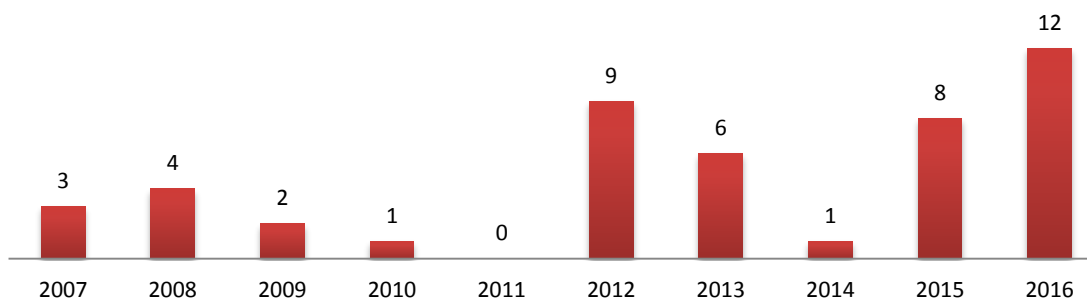
Categories	2017	2018	2019	2020	2021	CAGR* 2017-21
Total	68,992.2	72,747.1	76,737.0	80,967.1	85,435.4	5.5%
Cakes	26,514.0	27,844.8	29,237.3	30,698.8	32,223.4	5.0%
Pastries	21,119.2	22,326.6	23,604.0	24,959.4	26,381.5	5.7%
Bread	20,154.6	21,304.1	22,551.9	23,888.2	25,327.2	5.9%
Dessert mixes	1,012.6	1,076.1	1,143.6	1,215.2	1,291.6	6.3%
Frozen baked goods	191.8	195.5	200.2	205.5	211.7	2.5%

Source for both: Euromonitor, 2017.

*CAGR-Compound annual growth rate

Middle East and Africa

Product launches by year in Middle East and Africa, from 2007 to 2016

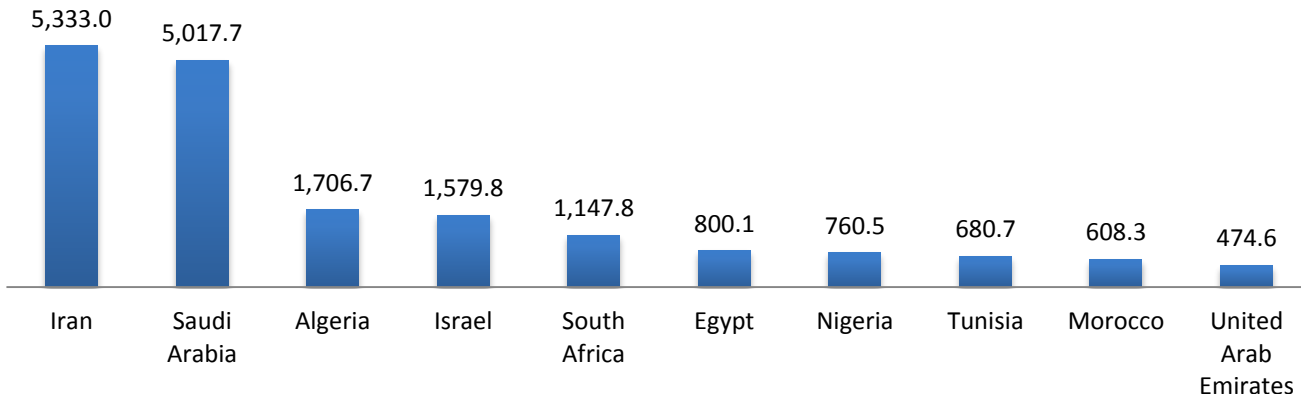


Source: Mintel, 2017

From 2007 to 2016, the Middle East and Africa saw 46 dough product launches, most of which occurred in the last four years of the ten-year review period. The retail sales of bakery products in this region was worth US\$20.6 billion in 2016, with the fastest compound annual growth rate of 10.6% from 2012 to 2016. The region is expected to continue to see the highest retail sales growth with a compound annual growth rate of 7.6% from 2017 to 2021, with retail sales forecasted to amount to US\$29.9 billion by 2021.



Retail sales of Middle East & Africa top ten bakery markets in 2016, US\$ millions



Historical retail sales of bakery products by category sold in Middle East and Africa in US\$ millions, from 2012 to 2016

Categories	2012	2013	2014	2015	2016	CAGR* 2012-16
Total	13,797.5	15,335.4	17,395.8	19,075.9	20,625.6	10.6%
Bread	9,494.8	10,596.1	12,210.3	13,425.8	14,502.1	11.2%
Pastries	2,369.5	2,607.4	2,842.2	3,112.8	3,374.8	9.2%
Cakes	1,615.3	1,782.8	1,969.4	2,141.2	2,331.2	9.6%
Dessert mixes	216.9	244.5	268.0	289.0	309.2	9.3%
Frozen baked goods	101.0	104.6	105.9	107.1	108.3	1.8%

Forecast retail sales of bakery products by category sold in Middle East and Africa in US\$ millions, from 2017 to 2021

Categories	2017	2018	2019	2020	2021	CAGR* 2017-21
Total	22,273.7	23,957.0	25,770.0	27,727.6	29,865.4	7.6%
Bread	15,590.5	16,643.5	17,769.7	18,944.7	20,219.6	6.7%
Pastries	3,691.3	4,054.4	4,446.7	4,900.2	5,395.6	10.0%
Cakes	2,547.0	2,784.2	3,045.9	3,338.2	3,664.1	9.5%
Dessert mixes	334.3	361.0	389.7	421.5	456.0	8.1%
Frozen baked goods	110.6	113.9	118.0	123.0	130.1	4.1%

Source for all: Euromonitor, 2017.

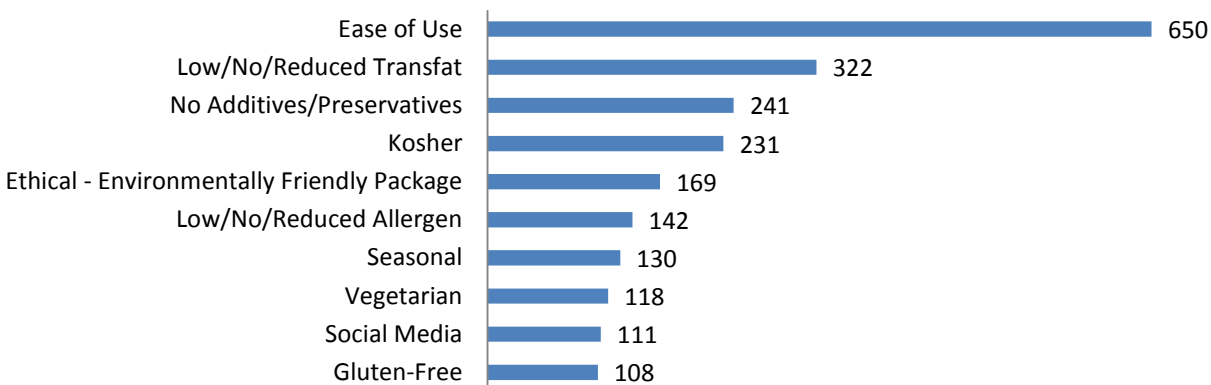
*CAGR-Compound annual growth rate

Product launch by claim

The top claims for dough products revolve around ease of use, followed by claims that highlight a decrease in trans-fat content (such as reduced hydrogenated oil content) or declare the products to be free of hydrogenated fat and free of additives or preservatives such as added colours MSG, flavours, or dyes. The fastest growing claims during the review period from 2007 to 2016 were vegetarian, economy, GMO-free, and no additives/preservatives, and ease of use.



Top ten dough product claims from 2007 to 2016.



Source: Mintel, 2017.

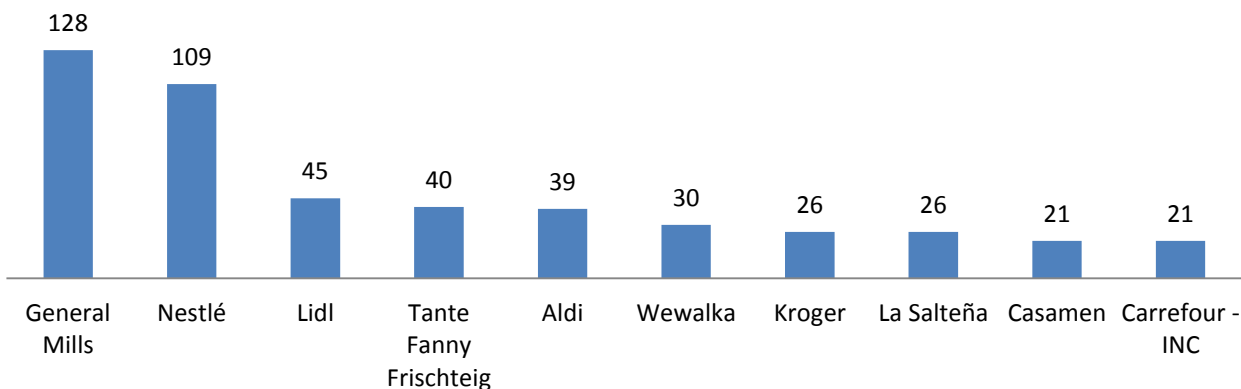
Product launch by company

General Mills launched the most dough products with a total of 128 products in the review period (2007 to 2016). Over 62% of the company's dough products were relaunches owing to change in product packaging, while 37.5% were new product introductions and range/variety extension. Over 84% of the company's dough product launches occurred in North America, followed by Europe (10%), and Latin America (4%). The United States accounted for 76% of the company's dough product launches, followed by Canada (7%), and the United Kingdom (5%).

Nestlé launched the second-largest number of dough products, with a total of 109 products launched in the ten-year review period (2007 to 2016). A lot of Nestlé's products launched were new product introductions (57%), followed by new packaging (30%). Over 51% of the company's dough product launches occurred in Europe and 48% in North America. The United States accounted for 49% of the company's dough product launches, followed by Spain (13%), and Germany (10%).

Lidl ranks third in terms of the most dough products launched, with a total of 45 products. Most of Lidl dough product launches occurred in 2009 (38%) and 2013 (20%). Over 66% of its dough products were a range/variety extension from its existing product/brands, 28% were new product introductions, and only 4% were relaunches. All of the Lidl's dough product launches occurred in Europe. France accounted for 33% of product launches, followed by Germany (22%) and Italy (11%).

Top ten companies in the world to launch dough products, from 2007 to 2016



Source: Mintel, 2017.



Opportunities for Canada

Canada-European Union Comprehensive Economic and Trade Agreement (CETA) – Opportunity for Canada

CETA will help provide opportunities for Canadian producers, processors and exporters to reach the EU's 510 million consumers.

It can support you by:

- Reducing or eliminating tariffs on products imported into the EU
- Improving and expanding market access for Canadian products
- Providing a competitive advantage with preferential access to EU markets

Find more details:

- <http://www.agr.gc.ca/eng/industry-markets-and-trade/foreign-market-information-by-region/europe/canada-european-union-comprehensive-economic-and-trade-agreement-ceta/?id=1438010928703>

For more information

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services**
www.tradecommissioner.gc.ca/
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- <http://www.agr.gc.ca/eng/industry-markets-and-trade/agri-food-trade-services-for-exporters/?id=1410083148447>

Resources

Euromonitor, 2017.

Mintel Global New Products Database, 2017.



Sector Trend Analysis

Dough Products

Global Analysis Report

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