

editor's choice

# Trends in Bakery: Sugar Reduction

2020

# Methodology

## Analysis & Parameters

- Analysis is performed based on new product launches tracked on the Innova Database.
- Geography: Global
- Time Frame: 2015- 2019
- Category: Bakery
- Positioning: No Added Sugar, Sugar Free and Low Sugar
- The consumer research is based on the 2019 Category Survey carried out among consumers aged 18-55. The results shown on this report include results from global consumers as well as country specific, in each of which N=1,000.

## Abbreviations & Notes

- CAGR = Compound Annual Growth Rate

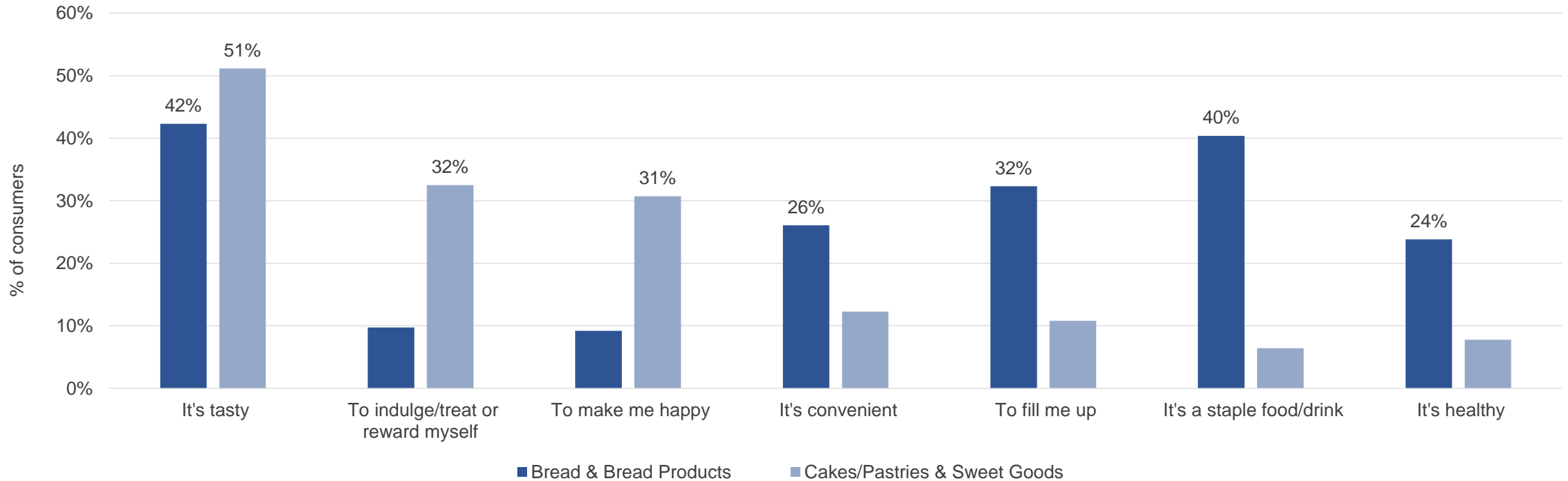
# Why do consumers buy bakery products?

Why do you usually consume a product from the selected category? (Global, 2019)

Taste is the main reason why consumers buy bakery products

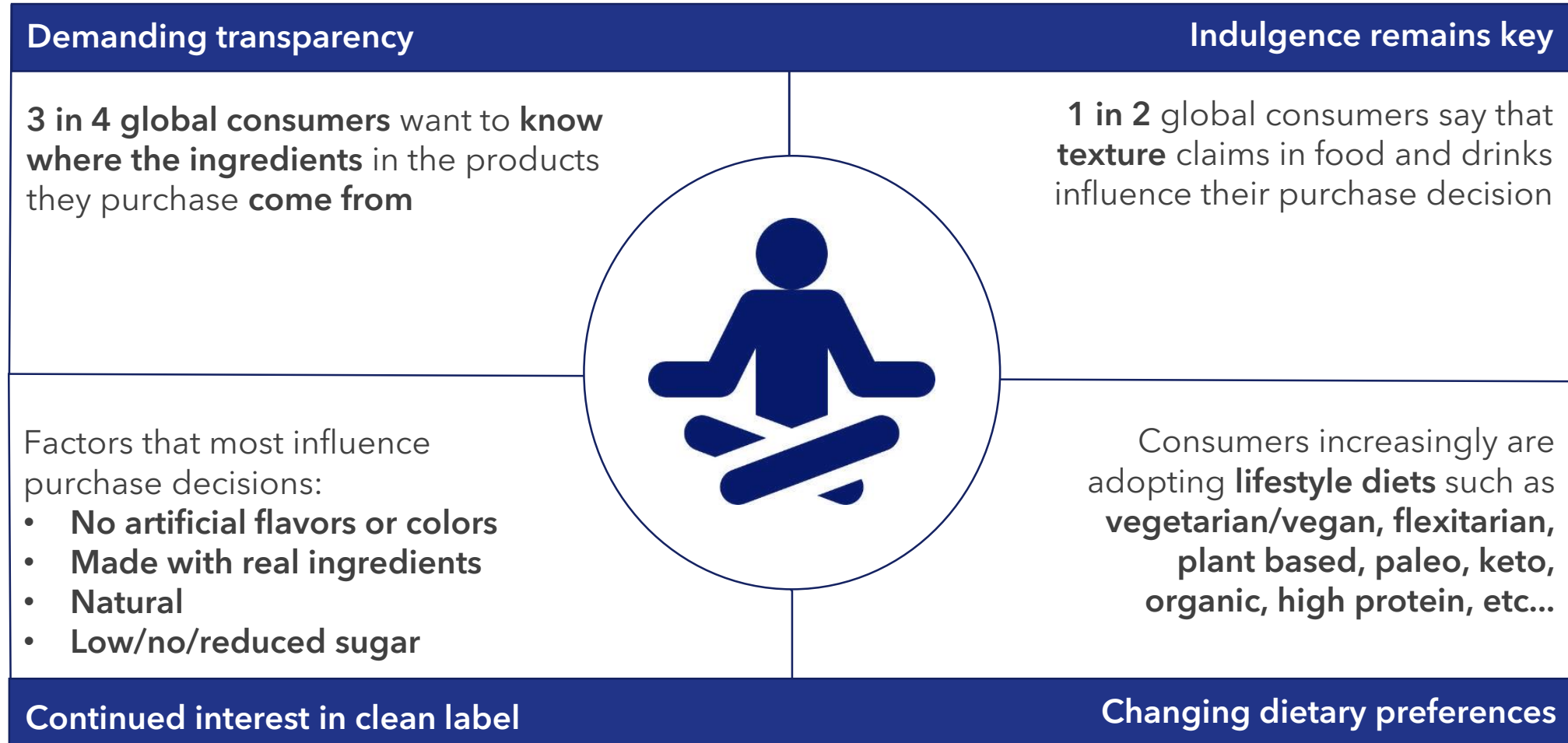
Cakes and sweet goods are most commonly bought as treats and to deliver happiness

Bread & bread products are perceived as healthy, convenient and as a satiating staple food.



Source: Innova Consumer Survey

# Consumers aim to balance indulgence and clean lifestyles



**Sources:** Innova Consumer Survey (2019), Innova Trends Survey (2020). Average of consumers in UK, US, Spain, France, Brazil. India, Germany, Mexico and China.

# Sugar reduction claims influence consumers' purchasing decisions



"I consider low/no sugar as 'clean label' food/beverage products"

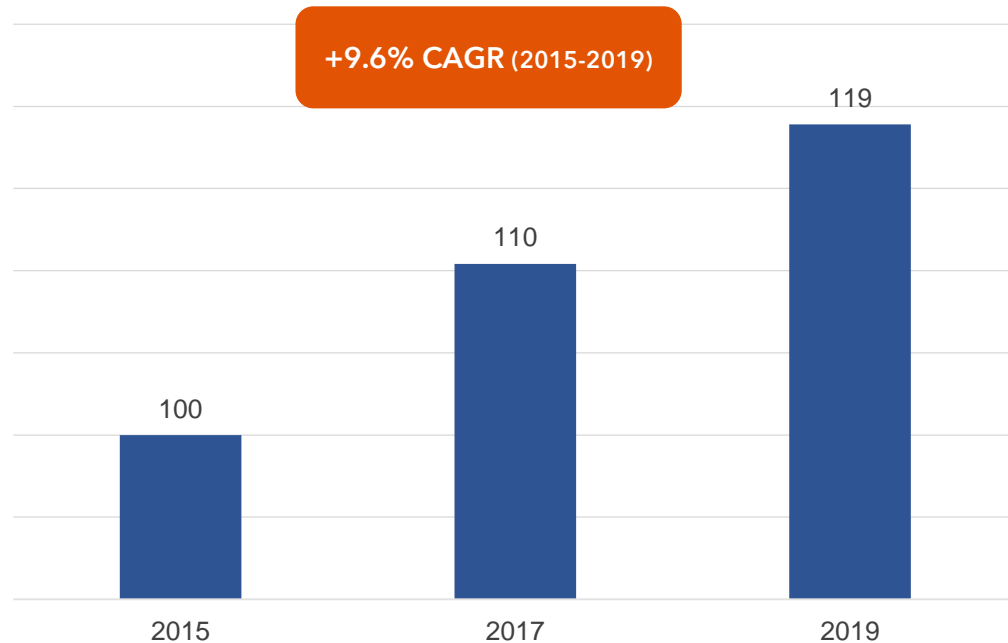


Source: Innova Category Survey (2019)

# Sugar reduction bakery launches witness growth over the past five years

## Sugar Reduction NPD is on the rise

Indexed number of bakery launches tracked with sugar reduction\* claims (Global, 2015-2019)



### Nutri Snacks Sin Azúcar Chocolate Brownie Galleta Integral: Sugar Free And Wholegrain Brownie Chocolate Cookies

Mexico, May 2020

Claims: Wholegrain. Source of fiber. Prodigestion fiber. 100 calories per portion. **Sweetened with natural stevia.** With wholegrain cereals. Designed by nutritionists. Supported by the dietary and nutritionists Costa Rica association. Natural origin ingredients. No trans fats. No preservatives, neither artificial colors.

**Source:** Innova Market Insights

**Note:** \*sugar reduction – low/no sugar, no added sugar, sugar free claims

# Sugar and carbohydrate related claims show growth within bakery

## Sugar reduction is a fast growing platform

Fastest growing health related claims in Bakery (Global, CAGR, 2015-2019)



## More launches seen with low/no/reduced carbs



Dr Kargs : Emmental Cheese Protein Snack

Germany, Feb 2020



Healthy Brand Muffin Coco Keto: Keto Coconut Muffin

Mexico, Jun 2020

Source: Innova Market Insights

# Two of the fastest growing health related platforms of innovation

Low/no/reduced sugars and carbs

Free from: Lactose free & HFCS free



Sweetwell Chocolate Sandwich Cookies With A Chocolate Filling

Mexico, May 2020



Tumaros Carb Wise Sundried Tomato Basil

United States, Jan 2020



Maxli Centeno Quinoa: Rye Bread With Quinoa

Colombia, Apr 2020



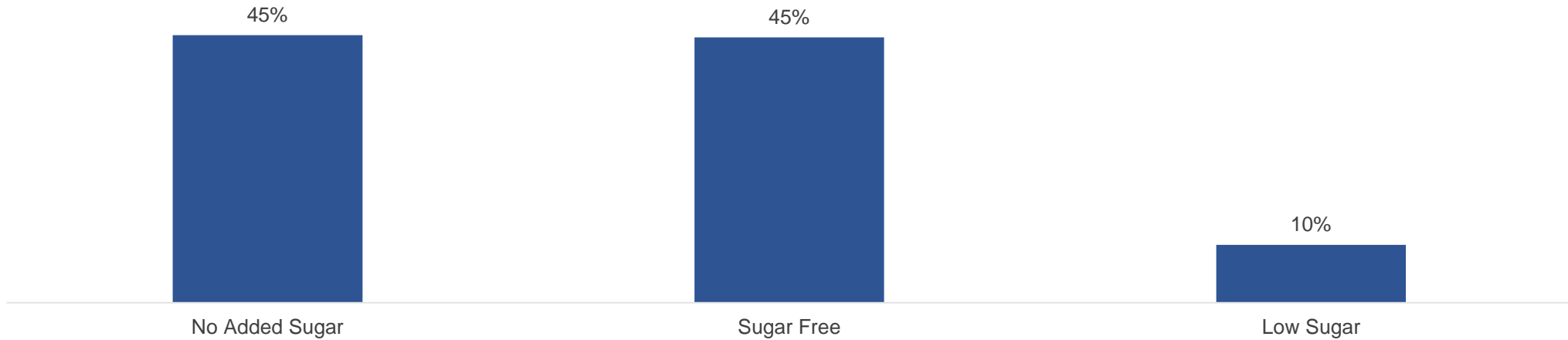
Casa Do Frango Bolo De Banana Sem Lactose: Lactose Free Banana Cake

Brazil, Apr 2020

Source: Innova Market Insights

# No added sugar: most prevalent claim associated with sugar reduction

Claims as a percentage (%) of new bakery launches tracked with a 'sugar reduction' claim (Latin America, 2019)



Source: Innova Market Insights

# Health-related product changes go beyond product basic reformulation

Standard



India, Nov 2019

Regular bread: Nilgiris 1905 Broken Wheat Brown Bread  
**Typical** formula



Reformulation



South Africa, Mar 2019

Woolworths food low GI Seeded Brown Bread  
**Improved** formula with focus on one or two nutritional changes

- Low GI for slow-release
- Wholewheat grain



Balanced Formula



Greece, Apr 2019

Papadopoulos Wheat Plus Sliced Wheat Bread With Vitamins And Minerals  
**Completely balanced** formula, made specifically for the dietary needs of Greek consumers in collaboration with the agricultural university of Athens.

- Contains folic acid and iron
- Contains Vitamin D
- Contains Calcium

Source: Innova Market Insights

# Outside of sweet biscuits & cookies, sugar free claims remains niche

## Heavily reformulated to be sugar free

« Purified water, proprietary fiber blend (oat fiber, corn fiber, flax meal), eggs, erythritol, whey protein isolate, sunflower oil, cellulose gum, natural flavor, sesame seed, spices, potassium chloride, salt. »



Smart Bun Sesame Hamburger Buns

United States, Oct 2019

## Blends of flours, ancient grains and seed

“Tapioca flour, potato mash, rice flour...”



Vergan Tortioca Multigrãos:  
Multigrain Tapioca Wraps

Brazil, Feb 2020

“Wheat flour enriched with iron and folic acid...”



Nutri Vida Pao Integral Com Cenora:  
Whole Carrot Bread

Brazil, Jan 2020

Source: Innova Market Insights

# Opportunity to incorporate other sweet ingredients



**Aminna Pao Sem Gluten Sem Acucar Com Abobora: Gluten Free And Sugar Free Bread With Pumpkin**

Brazil, Dec 2019



**Linea Kids Bolinho De Banana Recheio De Cacau: Banana Cupcake Filled With Cocoa**

Brazil, Jul 2020



**BFree Sweet Potato Wraps**

United States, Oct 2019

Source: Innova Market Insights

# Key takeaways

## Active ingredients

- After several years of focus primarily on clean and plant based characteristics, consumers are expected to begin paying more attention to the content of sugar and other nutrients. This will put pressure on manufacturers to develop clean ingredients that deliver desired nutrition profiles, functionality, and a satisfying sensory experience.

## Macronutrients

- Reduction of sugar and carbs is growing fast over the last 5 years.
- Focus is on providing no added sugar products and to work on the flour combinations.
- There is room for more innovation with the inclusions of other ingredients including pro/prebiotics, superfoods and fruits.

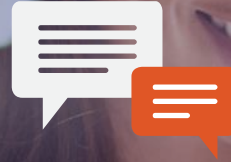
## Naturally sweet ingredients

- Outside of sweet biscuits & cookies, sugar free claims remains niche.
- Opportunities are seen to use alternative ingredients such as inclusions of fruits and naturally sweet ingredients such as sweet potato, carrot and pumpkin.

Source: Innova Market Insights

## For insight led future growth opportunities

The Innova Database is an online, cutting edge food & beverage product database - created by a dedicated team of industry-leading food and beverage experts that collect the latest data from more than 90 countries.



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## Innova Market Insights

Innova operates the biggest food and drink product database in the world. We pick up and record brands, ingredients, claims, packaging, patents & promotions in every major market.

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