



Trender i bakerimarkedet

Cerealfagdagen 7. april 2016

Kari Wulf, Fagdirektør innovasjon

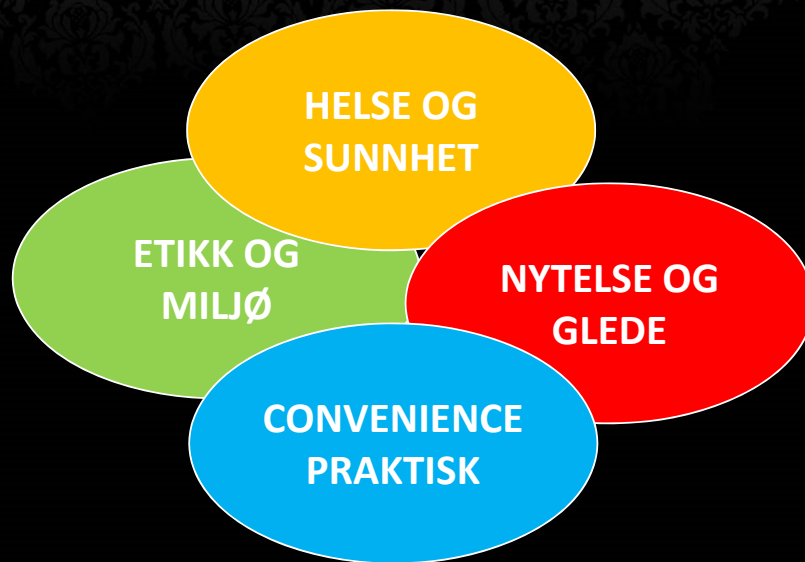
Agenda

1. Trender i Norge

2. Trender internasjonalt



4 VIKTIGE MEGATRENDER:



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Vi lytter til forbrukeren:
Forbrukerbehov
Forbrukerinnsikt
Forbrukertester

Vi lytter til erfarne trendmiljøer:
Mintel
Pej-Gruppen
Ipsos
Nielsen



MINTEL

- Based on a True Story
- Fat Sheds Stigma
- Alternatives Everywhere
- Eat With Your Eyes
- Good Enough to Tweet

150
1866-2016

Norske Spisefakta

Hovedtrender

Teknologisk Matforum
28 januar 2016
John Spilling

Ipsos MMI

NIELSEN NORGE

Vi studerer handlet og forbruker i over 150 land for å gi deg innsett i tendrer og vaner over hele verden.

PRENSIS
Norske forbrukerundersøkelser 2016

FORNE
Norske forbrukerundersøkelser 2016

KONTRAKTER
Norske forbrukerundersøkelser 2016

Kort om Norgesmøllene;

En del av Cernova konsern – omsetning 3,4 mrd NOK

Eiere: Felleskjøpet (66%) og Fritt Ord (34%)

Omsetning Norgesmøllene – 1,1 mrd NOK

3 møller i Norge

135 ansatte

Møllerens merkevare

Leverandør til dagligvare, bakeri, industri og Horeca



10 trends that shape the food & drink market



1. CLEAN LABEL

In some countries, avoidance of artificial ingredients is almost as high as avoiding high fat or sugar content

All natural
Milk from grass fed cows
No aspartame
No sucralose
No gelatin
No artificial colorings
No preservatives
No high fructose corn syrup

UD Certified
NO Gluten Free
GF

Milk produced without the use of recombinant bovine growth hormone



2. THE REAL THING

Consumers are craving products and experiences that come with a stamp of authenticity.



Craft beer is fastest segment in the US

3. SUSTAINABILITY

46% of US consumers across all age groups who said stores should sell more environmentally-friendly products.

an idea that will grow on you



Waitrose opens first farm shop in the UK

Megatrendene som styrer innovasjon



HELSE

NYTELSE

ENKELT/PRAKTISK

MILJØ/ETIKK

AUTENTISK

Havre: 40% = sunt
Protein: 50% ønsker mer protein
Fiber og fullkorn = +48% 5 år
Reduksj salt: Saltpartnerskapet
Helsepåstander : Bruk av pos
Brødskala'n
Glutenfritt 1 av 4 kutter ned på gluteninnholdet. Kategorivekst 30% siste 12 mnd

«**Bare det beste er godt** nok»
 Smak. Nytelse, Fortjene
 Viktigste smaker: **Sjokolade, vanilje. Jordbær**
 Trendy **hybrid** bakeprodukter
 Fristende matfoto « delight»
 Økende grad kombineses denne trenden med Snacking og «for meg, **fordi jeg fortjener det**»

Enkelt å spise, tilberede, ta med, få tak i.
 2 Retninger:
 - «On the go» & «Snacking»
 - Forenkle en travel hverdag
Viktige drivere: Sult/smak, Emballasje, tilgjengelighet, tidsbesparende, praktisk, lite å tilsette
 UK: 7 av 10 voksne «snacker» på farten daglig

Miljø (retail ready, papir, ikke over emballering, flerbruk, **forhindre matsvinn**)
 Stort fokus på matsvinn i Norge i dag, bl.a med egen portal for dette (matsvinn.no)
Over 70 % av matsvinnet - fra privathusholdninger. Anslag hver nordmann kaster over 46 kilo mat i året = ca. 25 % av maten som omsettes

Lokalt, ekte, røtter, tilbake til naturen
 39% søker autentiske smaker
Lokal mat, Bondens marked
 Hva betyr dette: Bruk av eksotiske korn- og frøsorter og gamle/ur kornsorster. SPELT. Lokalprodusert, utnytte de lokale **spesialitetene** som finnes i nærmiljøet.

FERSK BRØD SALG I NORGE SISTE 52 UKER

4,9 mrd NOK
+ 1,0%-p

135 000 tonn
-1,9%-p

Trenden er i ferd med å snu
Siste 4 uker: +/-0 !



Kilde: Nielsen pr 21.02.16



Grovere brød

7 av 10 bestselgende ferske brød er grove / ekstra grove.

Fokus på grovere produkter i kampanjesammenheng fra bakerbransjen, industrien, Opplysningskontoret for brød og korn og BKLF har vært med å bidra til økt fokus på grovere brødprodukter.



Eksempel fra lokalbakt

Målsetting

- Lansere et nasjonalt Hardanger konsept som inneholder brød og bakervarer basert på gamle tradisjonsoppskrifter.
- Produktene skal lanseres under merkevaren «Hardanger».
- Konseptet skal selges i egne utsalg, og kan også selges via Norgesmøllenes salgskanaler.
- Omsetningsvekst i Hardanger Bakeri på 50% innen 2016.







Hardangerfjorden



Hardanger Kart



Hardangerbunad



Hardangervidda



Hardanger Natur



Hardanger Eple

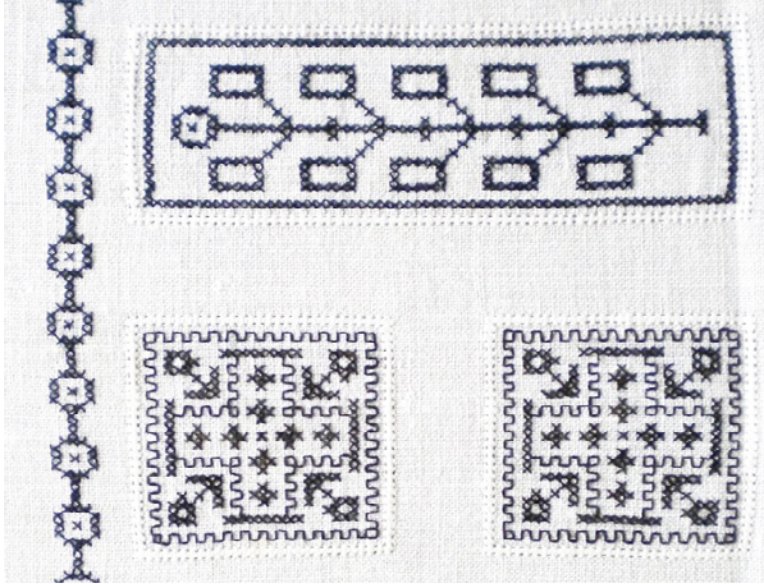


Google-søk:
Hardanger






Hardanger
Bakeri







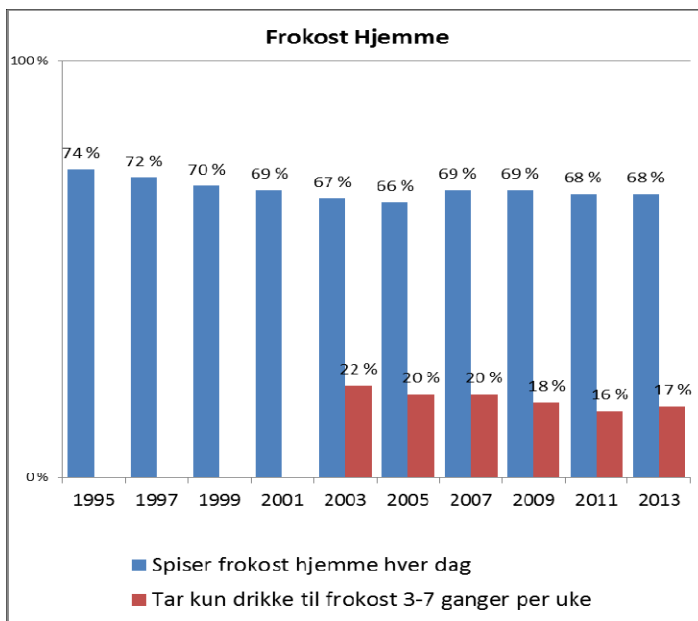


Spisedøgnet



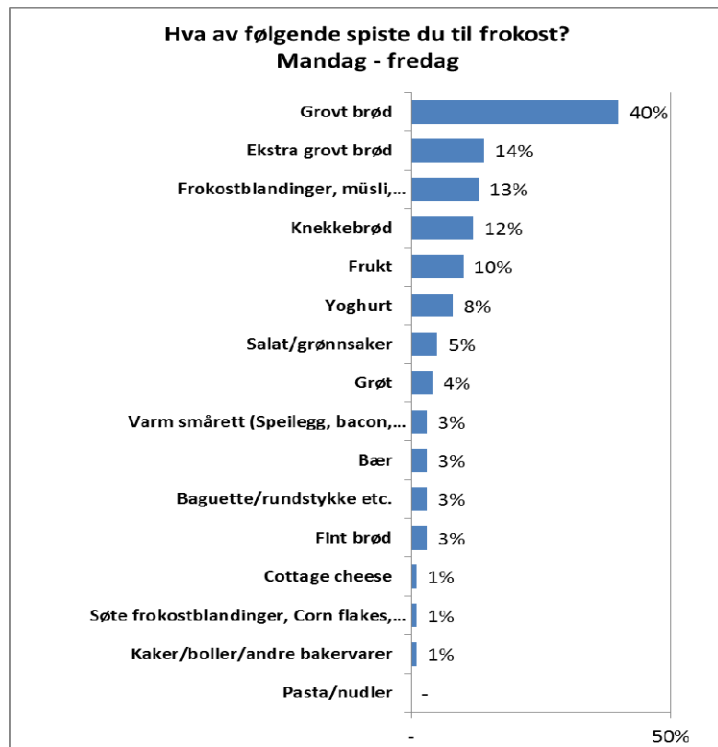
Den norske hjemmefrokosten står sterkt

Nesten 7 av 10 nordmenn spiser frokost hjemme hver eneste dag

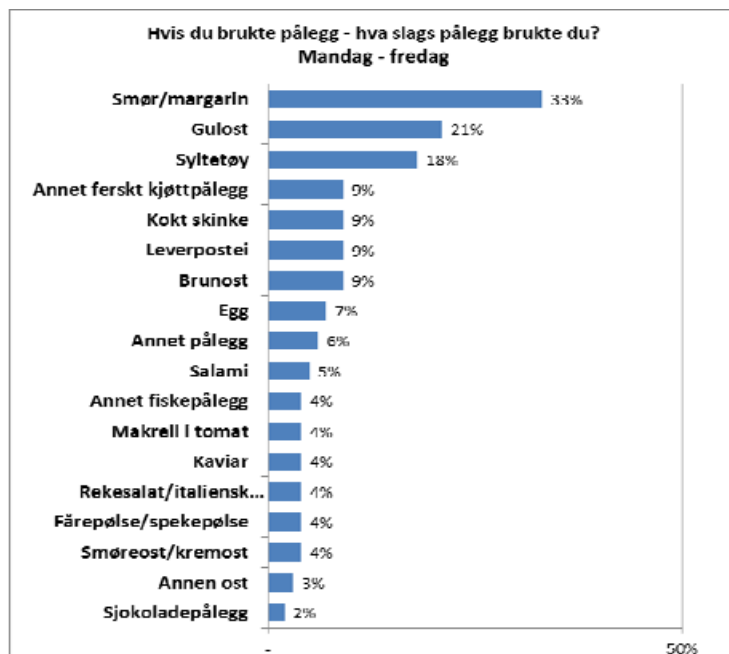


Hvor spiste du frokost i dag?
72% satte seg ned til bords og spiste.
15% tok frokosten ved kjøkkenbenken eller på vei ut.

Grovbrød dominerer frokostmenyen på hverdager

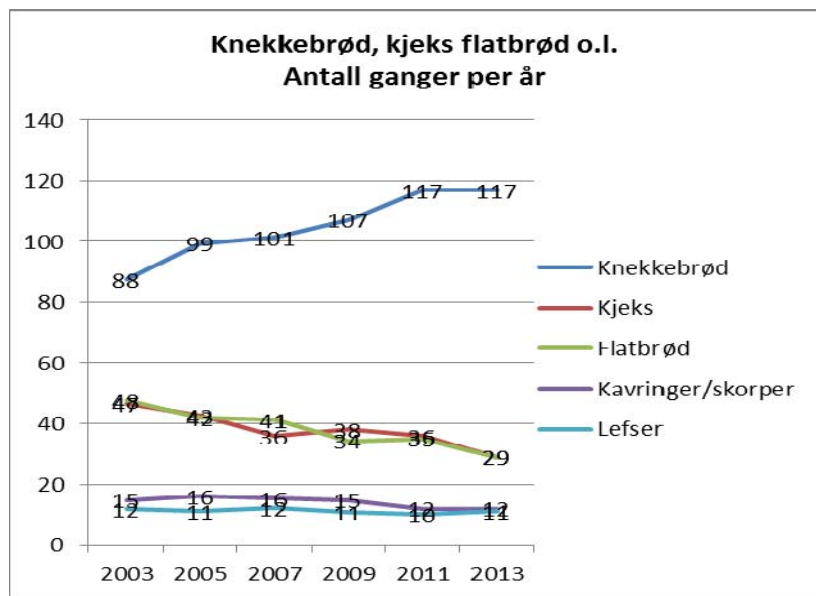


Gulost og syltetøy er de to vanligste påleggene på hverdagsfrokosten.
1/3 bruker smør/margarin



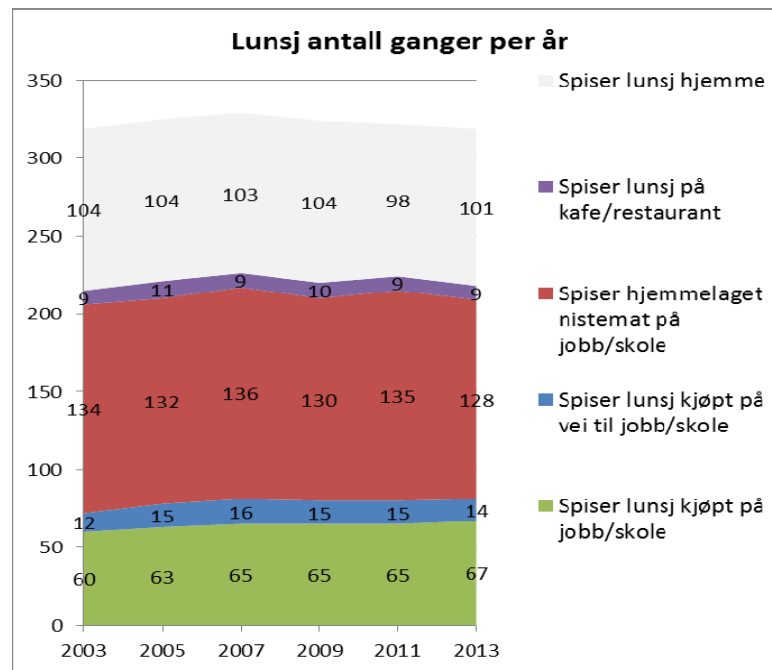
NB! Resultatene viser andeler blant totalt spurte, ikke bare blant de som spiser brød til frokost.

Knekkebrød har etablert seg som en seriøs utfordrer til vanlig brød



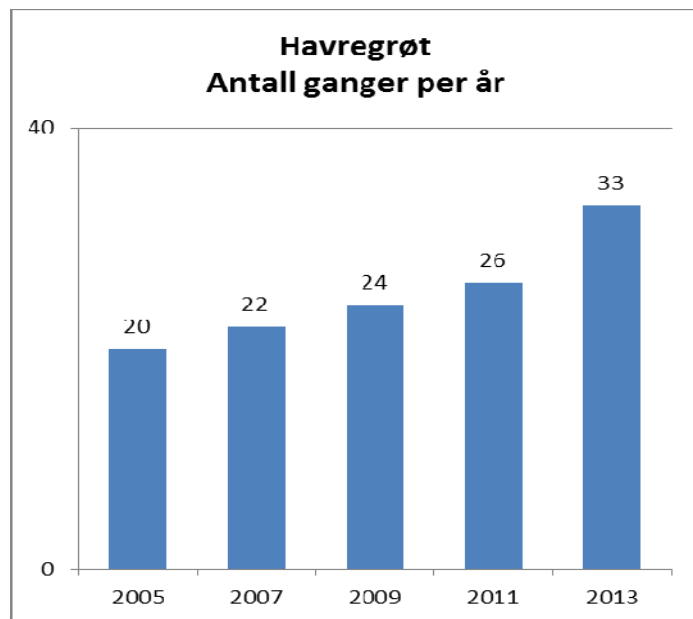
11% spiser eget hjemmelaget knekkebrød minst ukentlig.

Jevn økning for lunsj som er kjøpt/fått på jobb eller skole.
Ujevn utvikling for matpakken, men nedgang siste periode.



Havregrøten har en raskt stigende stjerne

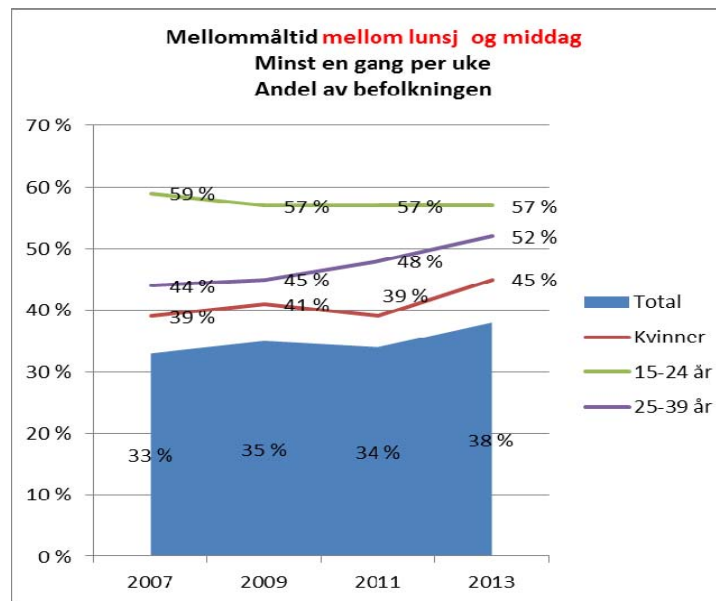
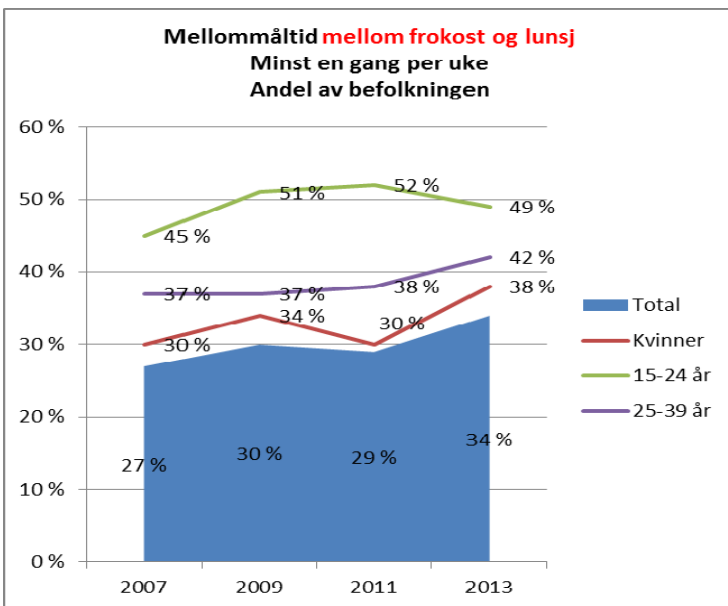
25% spiser havregrøt annenhver uke eller oftere



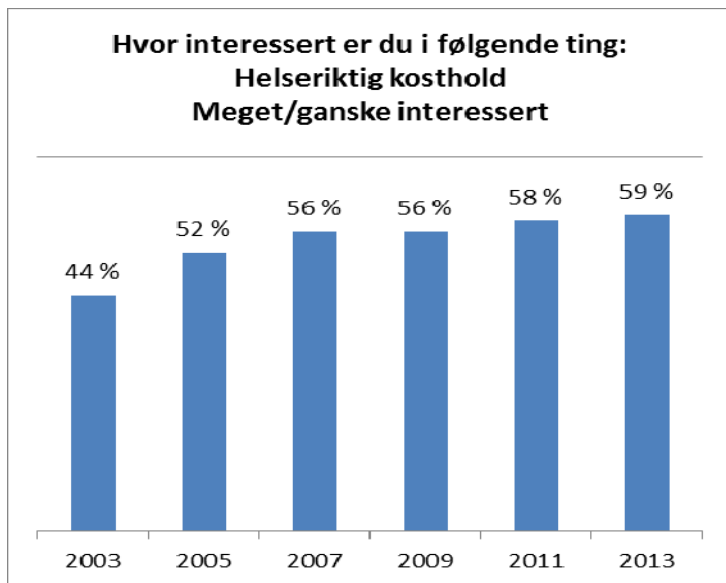
Kvinner og personer 15-24 år spiser oftest havregrøt

Flere spiser mellommåltider

Aldersgruppen 25-39 år og kvinner driver veksten.



Interessen for helseriktig kosthold har steget sammenhengende i ti år



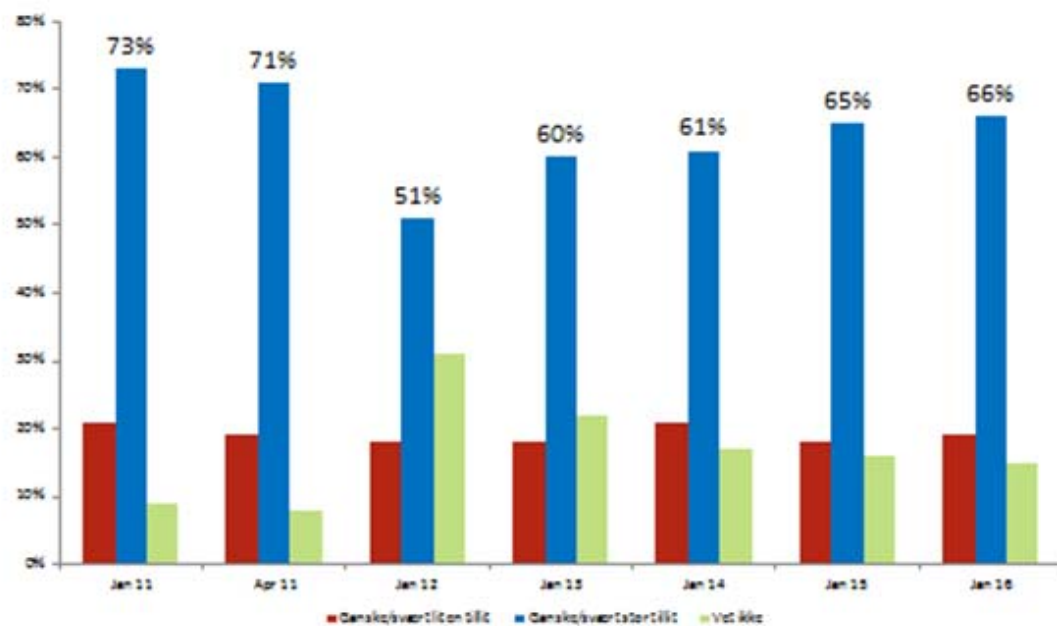
Kvinner og folk i Oslo er mest opptatt av helseriktig kosthold.
Økt helsefokus i barnefamilier.

Ingen får lenger **alene definere** hva sunnhet er for nordmenn

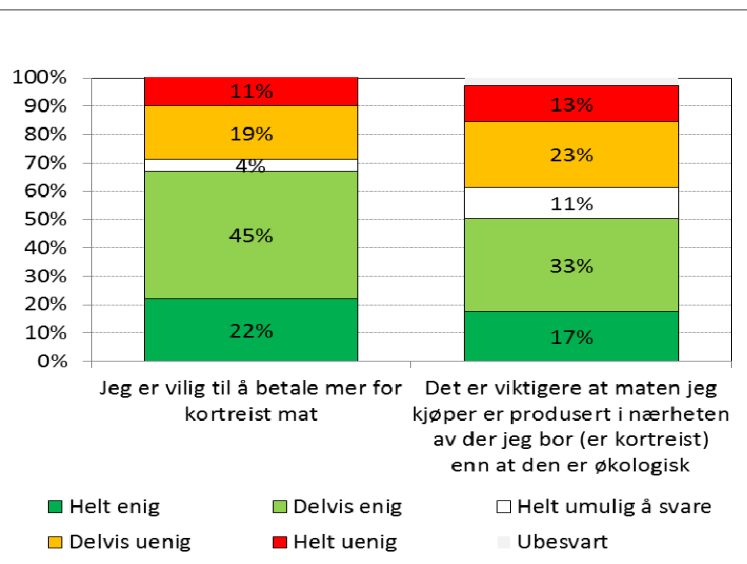


En blogger

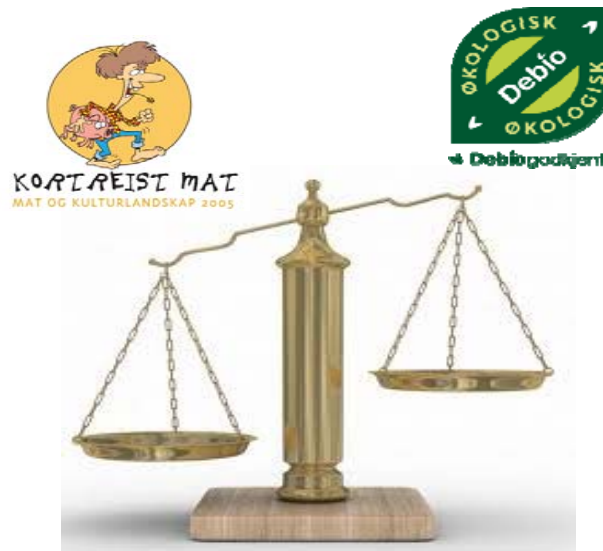
Har du tillit til kostrådene fra Helsedirektoratet? %. Norstat



Setter vi «kortreist» opp mot «økologisk», vinner «kortreist».

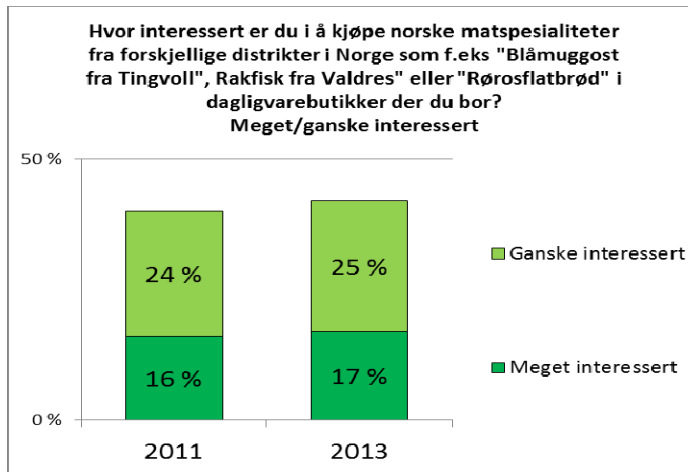


To viktige unntak - de yngste samt Oslo.
Her er det flere som setter
«økologisk» foran «kortreist».



Det er økende interesse for norske matspesialiteter

Størst interesse blant de med høy inntekt og høy utdanning

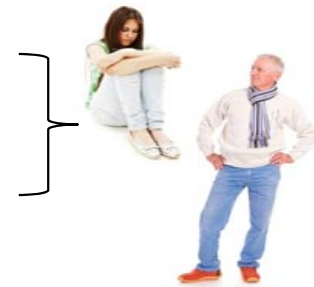
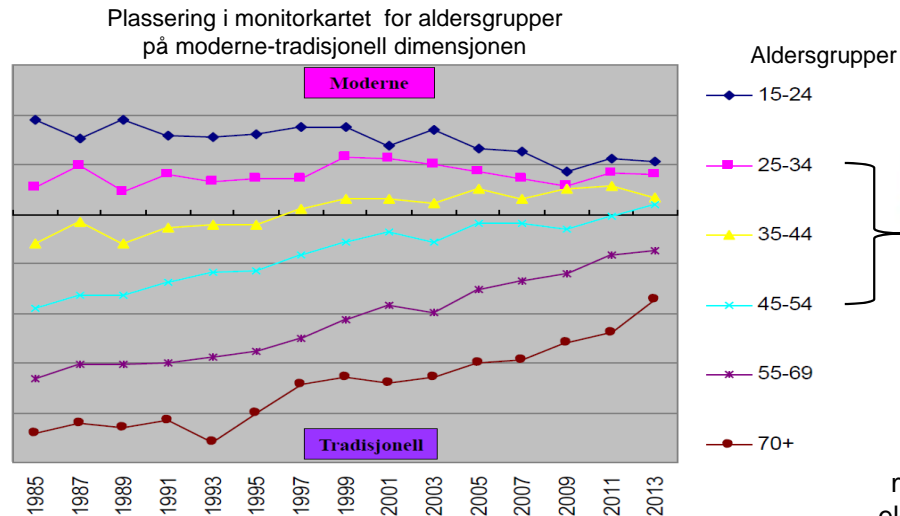


Generasjonskløften har forsvunnet

Grad av «endringvillighet» er i dag mindre knyttet til «fysisk alder»
 De eldre har de siste tjue år blitt langt «yngre i sinn»
 De yngste har de senere år blitt «traustere i sinn»



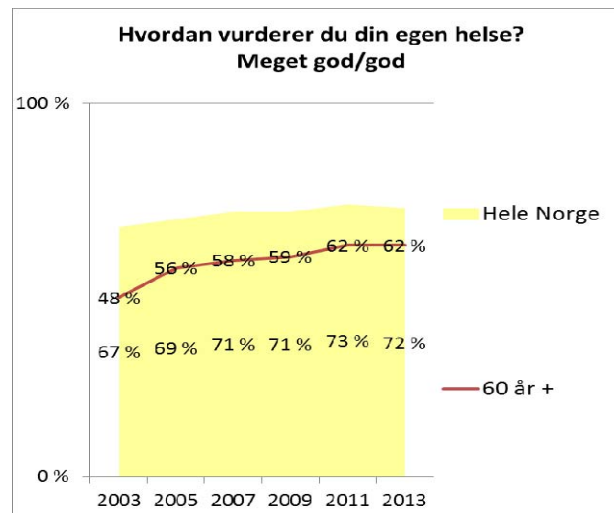
Avstand i endringvillighet mellom yngste og eldste aldersgruppe før 1995



Avstand i endringvillighet mellom yngste og eldste aldersgruppe Nå



Nordmenns helse har blitt markant bedre - særlig gjelder det de eldre



MİNTEL

- Based on a True Story
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- Good Enough to Tweet

150
år
1866 – 2016






Based on a True Story

Consumers have been romanced by the stories products are telling about their origin, ingredients or inspiration, but confusion arises when similar claims are being made by legitimately hand-crafted products as well as mass-produced food and drink.





“We are well aware of the mounting distrust of Big Food... We understand the increasing numbers of consumers are seeking authentic, genuine food experiences and we know that they are skeptical of the ability of large, long-established food companies to deliver them.”

Denise Morrison,
CEO of Campbell Soup Co.,
February 2015

By 2014, the dynamics had shifted

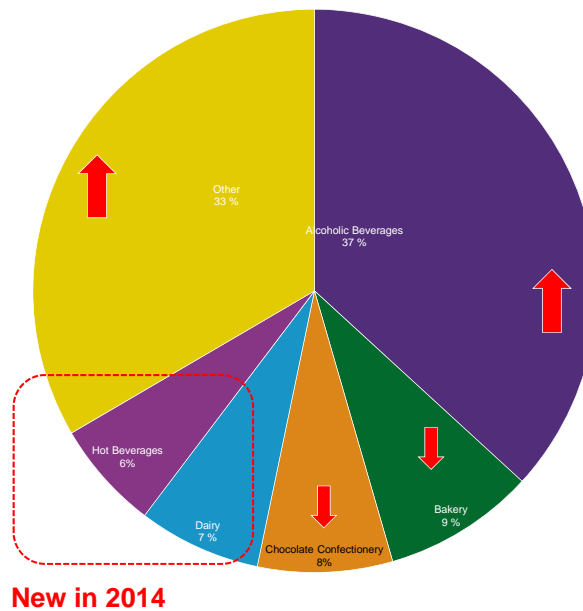
Global food and drink launches that use “craft” with word variants in the product description, by top categories, 2014



PepsiCo Caleb's Kola

The product nods heavily towards craft in its packaging and that it is a smaller scale brand with a quirky name, originating from the inventor of Pepsi, Caleb Bradham

Caleb's Kola includes sparkling water, cane sugar, kola nuts from Africa, spices and a hint of citrus



Consumers seek unique and meaningful stories

FROM PURE FACTS



Froh Natur

Premium Beer Ham, Germany

'made from meat from animals whose welfare is taken in to consideration'

TO EMOTIONAL STORY



Carroll's Hand Crafted

Slow Cooked Smoked Tullamore Ham, Ireland

'Our grain-fed pigs live in a superior environment in Ireland, which we believe produces a higher quality and better tasting ham'

What it means

Trust

Consumers' faith in a company and product is becoming more of a necessity in the buying process

Craft

Shoppers continue to want to know more about a product, its maker and inspiration

Care

Honest communication about the thought that went into making, producing, packaging and selling a product can connect with consumers

Size

A "think small" mentality can help larger companies adapt to consumer values

Fat Sheds Stigma

Consumers' negative stereotype that any and all fat content is "evil" has begun to diminish. The rising awareness of the many sources of fat is ushering in a paradigm shift.



Butter makes a comeback, and some brands celebrate the fat!



US consumption rates of butter reached a 40 year high in 2014

Time magazine put butter on the front cover

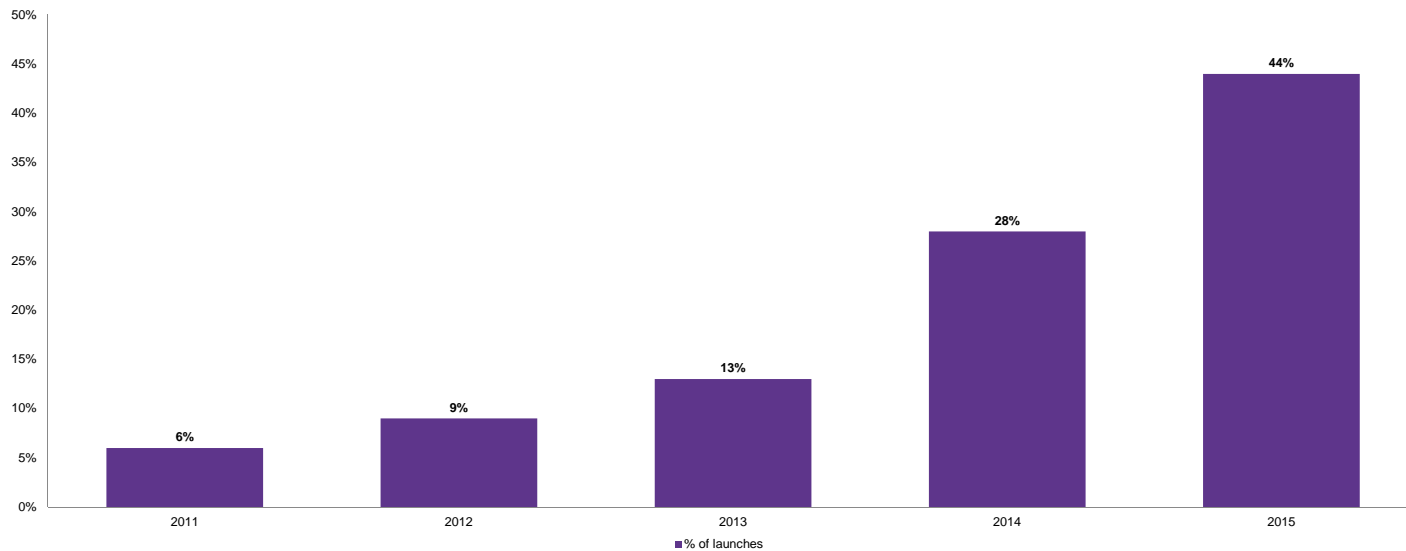


Migros Café Royal, Switzerland

Double Fat Double Cream Coffee & Milk Drink features an extra portion of caffeine and an extra creamy texture

“Good fat” descriptions are rising

Global food and drink launches with “good fat” in product description, by % of launches 2011-15



“New” fats perceived as better for you infiltrate food and drink

Avocado oil



Good Health Kettle Crisps, USA

Made with 100% avocado oil, 30% less fat than regular potato chips

Olive oil



Malmö Chokladfabrik 1888 , Sweden

70% Dark Chocolate with Natural Olive Extracts

What it means

Teach

Not all consumers are aware of the hierarchy of fat ingredients, showcasing that educational communication is still needed to help gain fans

Good

Products using – or reformulating to incorporate – so-called “good” fats can emphasize their inclusion

Options

Offering consumers a variety of fat content, especially in dairy products, helps people make decisions that fit their preferences

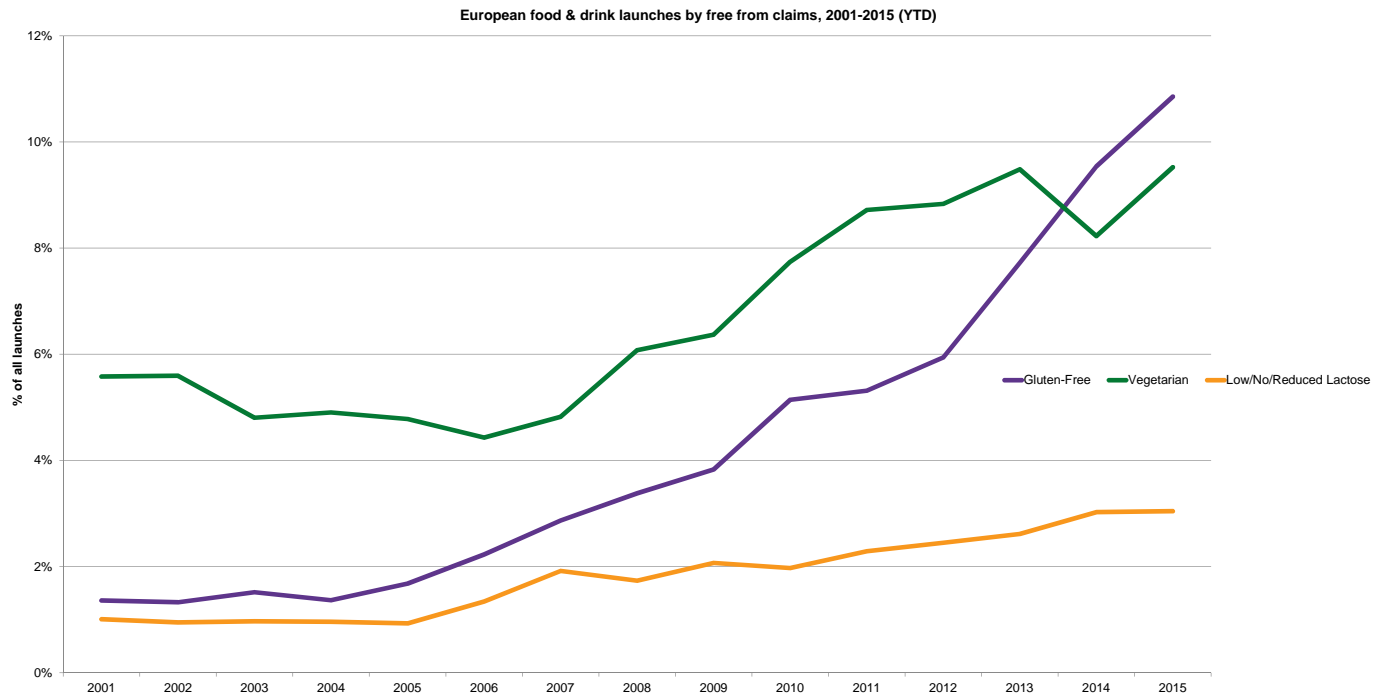
Control

While some fats are better than others, as with everything: portion control still matters

Alternatives Everywhere

Veggie burgers and non-dairy milks have escaped the realm of serving as substitutes primarily for people with dietary concerns, consumers with allergies and followers of vegetarian or vegan diets – and now have broader appeal.

'Free from' trends have seen steady growth



Mainstream brands enter mainstream channels



Nestlé gluten-free corn flakes,
Europe



Barilla gluten-free pasta, USA and
Italy



Philadelphia lactose-free soft
cheese, Europe



Dr. Oetker Pizza Veggie,
Germany
Sold €2million in 20 weeks



Ben & Jerry's Non-Dairy ice
cream with almond milk, coming
to the USA in 2016

Even artisan bakeries across Europe are moving in on the trend

A new breed of small artisan bakers offering exclusively gluten-free products has emerged in London, Paris and other urban centres but high street bakery chains are yet to capitalise on the opportunity.



Helmut Newcake gluten-free patisserie, 2 locations in Paris



Romeo's Gluten Free Bakery, London



Gluten-free bakery Chambelland, Paris



Gluten Free Bakery

Gluten-free bakery Glu free, Milan



Gluten-free bakery Beyond Bread, London



UK foodservice chains and coffee shops have embraced gluten-free

Gluten-free bakery options are increasingly being offered as alternatives

handmade
burger C2

(June 2015) Our new gluten friendly menu is available in all of our restaurants including our new #glutenfree bun!



Starbucks and Costa offer gluten-free options via Newburn Bakehouse (2014)



Foodservice brands featuring gluten-free menu options, UK



50% of UK foodservice chains now feature gluten-free menu options

Source: Horizons at FDIN Free From Conference 2015

At retail level, a new level of gluten-free indulgence appears

Brands such as Udi's have significantly changed the nature of gluten-free in sweet bakery – making it much more about taste and indulgence

Udi's Cashew Nut & Salted Caramel Cookie (UK)



Hale & Hearty Date & Chocolate Flapjack (UK)



Marks & Spencer Made Without Wheat Gluten Free Extremely Chocolatey Millionaire's Caramel Crispie Mini Bites (France)



Cow's milk alternatives transcend soy

- 13% of French and German consumers now use non-soy milk alternatives e.g. oat milk, coconut milk
- Indulgence is a key driver in 'early adopter' markets, hence coconut milk chocolate, almond milk ice cream...



Oatly! Almost Like a Proper Breakfast
Oat smoothie with fruit puree and juices, dairy- and soy-free



Ombar Coconut Milk Chocolate, Germany
Raw, organic, milk-free



Almond Dream Non-Dairy ice cream, now in the UK
"Delicious and creamy"

New protein sources emerge: Plant, marine, even insect...

- Close to a quarter of German consumers say they have tried marine proteins like algae
- A quarter of UK consumers say they're interested in trying insect protein



The Protein Ball Co. Goji + Coconut, UK
Rice, pea and hemp protein



Lifefood CRAWnchies Sea Lettuce, Finland
Contains 18g protein in 100g serving

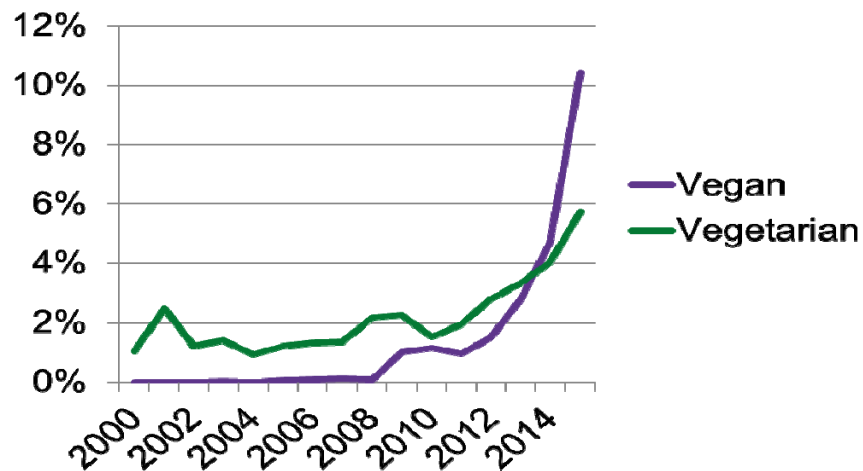


The Green Kow, Belgium
Green Bugs Tomato & Mealworm Spread

Germans especially have a growing hunger for vegan diets

The popularity of **vegetarian, vegan or 'flexitarian' diets** is growing for varying motivations, including consumers' health considerations and ethical values. In particular, the vegan diet is rapidly moving from the fringe to the mainstream in Germany, where an estimated 1.2 million citizens are vegan. Vegan supermarkets such as Veganz, which has 10 stores, are fast-growing in the market.

Share of launches with vegetarian and vegan claims in all food & drink launches, Germany, 2000 –15



What it means

Variety

Alternatives provide more options for curious consumers – not just vegetarians and vegans

Less processed

Alternative and free from foods are part of a wider (and substantial) shift toward more healthful and less processed ways of eating

Reconcile indulgence

There are opportunities to reconcile indulgence with these trends – they are not limited to commodity products

Eat with Your Eyes

Flavor has long been the focus of innovation, but our more visual and share-focused society calls for innovations that are boldly colored, artfully constructed and sometimes just cool.



Doritos gets colorful



Charitable Snacks

- In the US, PepsiCo's Doritos snack brand partnered with a lesbian, gay, bisexual and transgender (LGBT) charity for an online release of **Doritos Rainbow Chips**.
- The product features rainbow-colored Doritos chips inspired by the LGBT Pride flag.
- **The product is available exclusively to consumers who donate to the It Gets Better Project**, an organization that seeks to provide hope to LGBT young people and make the world a better place for them.



Colour, shape and texture disrupt traditional perceptions



Ets Nicol, France

Bloo Tonic Water, enriched with liquid extracts of marine spirulina



Eat The Ball, Austria

Fresh frozen bread rolls in the shape of sports balls



Stonyfield, USA

Organic Super Grains Strawberry Buckwheat & Quinoa Greek Nonfat Yogurt

EAT WITH YOUR EYES

BURGER BUNS GETS COLOURFUL AS IMPRESSIVE VISUAL PRESENTATIONS OF FOOD BECOME MORE IMPORTANT

Burger King's bright red Aka Samurai buns in Japan and its 2015 Black Halloween Whopper in the US



『AKA SAMURAI CHICKEN』



KFC recently launched black and pink chicken burgers in limited editions in China



Trendy designer eclairs owe a lot to visual appeal

Designer éclairs and most recently choux have been touted as the new cupcakes having been established in the French market for some time. They are very versatile (savory or sweet filling) and equally pleasing to the eye. Choux especially fit the on-the-go snacking trend



L'éclair de Génie, Paris



Paul, UK



Choux, London



L'Atelier de l'Éclair, Paris



Miss Choux Paris,
Madrid

US Menu Examples: Crunchy ingredients



Starbucks

Salted Caramel Square with Pecans

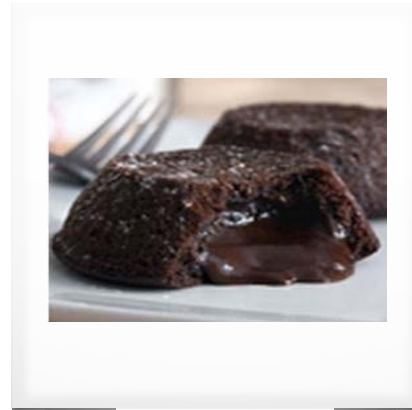
A dense chocolate square full of crunchy pretzels, pecans and swirled with caramel.



Burger King

Hershey's Sundae Pie

Say hello to our HERSHEY'S® Sundae Pie. One part crunchy chocolate crust and one part chocolate crème filling, garnished with a delicious topping and real HERSHEY'S® Chocolate Chips.



Domino's

Chocolate Lava Crunch Cake

Oven baked chocolate cakes, crunchy on the outside with molten chocolate fudge on the inside. Enjoy an order of two.

Good Enough to Tweet

The rise of food-centric media has sparked a new interest in cooking, not only for the sake of nourishment, but for the purposes of sharing one's creations online via social media.

Food is a common topic on social media

Food&Drink

is **#2 Pinterest's most browsed category** by active and daily users ('pinners') after DIY & Crafts.

39%

of **UK social media users have interacted with and/or posted about a food or drink venue on social media.**

236k

people **followed on Twitter** the UK's competitive cooking reality show '**MasterChef**'.



Looking for recommendations

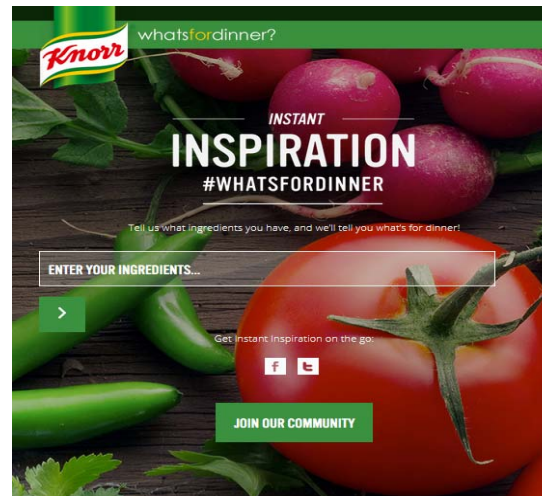
Cadbury Joy Generator, Australia

An interactive vending machine that chose a chocolate bar that matched a user's personality based on their Facebook profile



Knorr 'What's for Dinner?', South Africa

The application quizzes users about preferences and ingredients and then suggests recipes, using Knorr products



There is notable demand for new bakery snack formats

3 in 10 UK consumers show interest in buying new cake formats. Hybrids have recently proliferated but there is still potential for more development in Europe as consumers want to be in on the latest craze



Townie (Tartlet | Brownie)



Brookie (Brownie | Cookie)



Muffle (Muffin | Waffle)



Macanut (Maracoon | Donut)



Duffin (Donut | Muffin)



It started with the Cronut at the Dominique Ansel bakery in New York and variations of the cronut have appeared at bakeries worldwide and in packaged retail (esp. in Japan)



Atrian Home Crok Glas croissant-doughnut pastry (Spain)



Yamazaki Wonut Chocolate Waffle Doughnut (Japan)



Kobeya Caramel Muffish a hybrid of muffin and brioche (Japan)



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