



# THE EU AGRICULTURAL OUTLOOK FOR ARABLE CROPS AND BIOFUELS

## Session 7



THE 2019  
**EU AGRICULTURAL  
OUTLOOK CONFERENCE**

**Sustainability**  
from Farm  
to Fork







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sales, Lesaffre





**LESAFFRE**

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## Bread & Viennoiserie consumption trends

11/12/2019 – Hervé BOLZE, Lesaffre Marketing Director

# One croissant

Same name but different products.



# One bread



 Austria



 France



 Germany



 Greece



 Italy



 Netherlands



 Poland



 Portugal



 Russia



 Spain



 Sweden

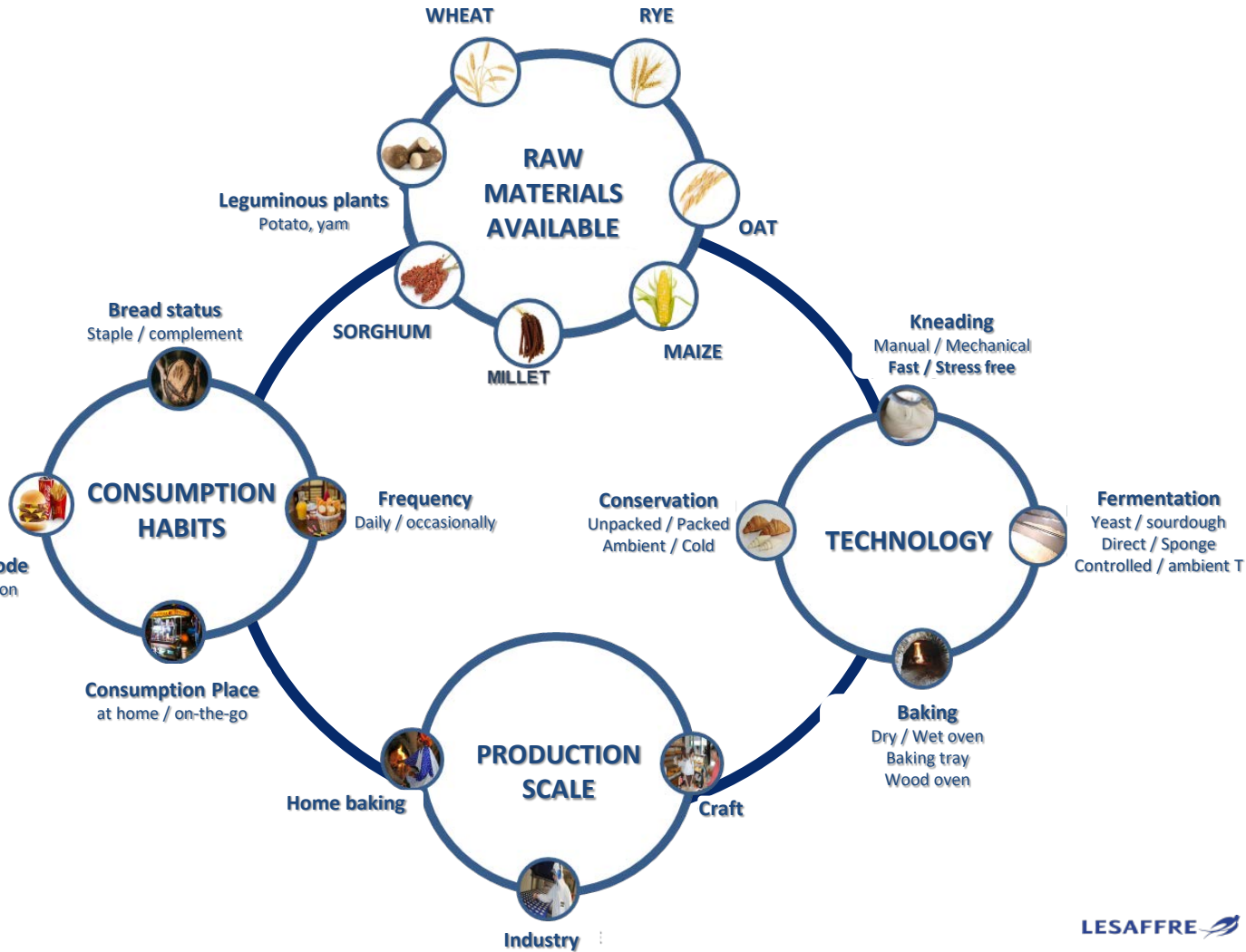


 U.K.

# A complex ecosystem

The variety of breads is the result of a complex ecosystem

Consumption mode  
as is / in combination

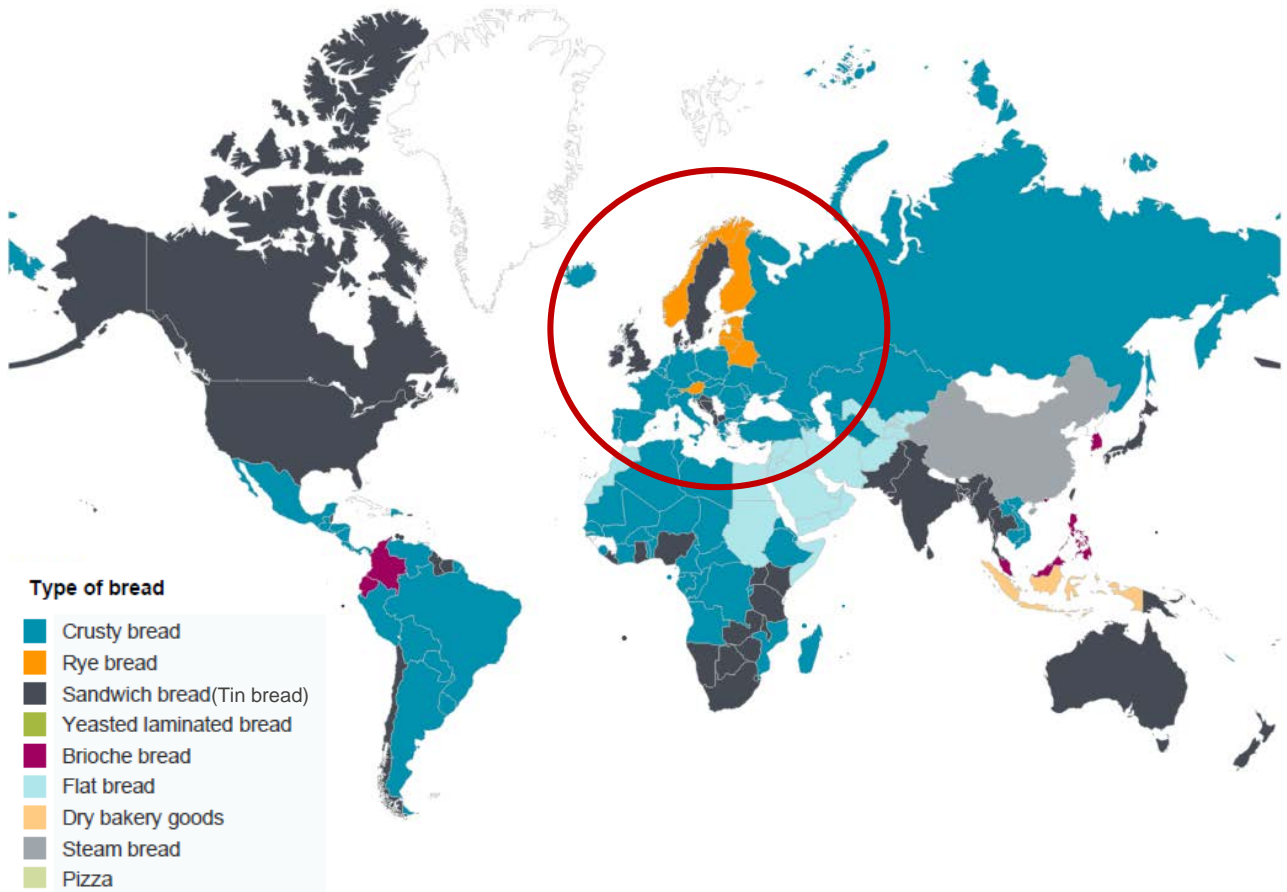


# Main bread types

Bread (fermented baked goods) consumed varies according to country

9 large homogeneous families of bread

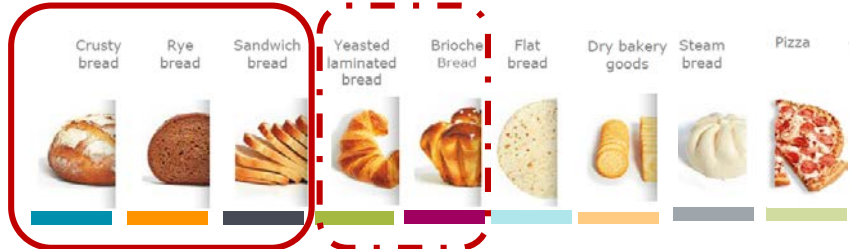
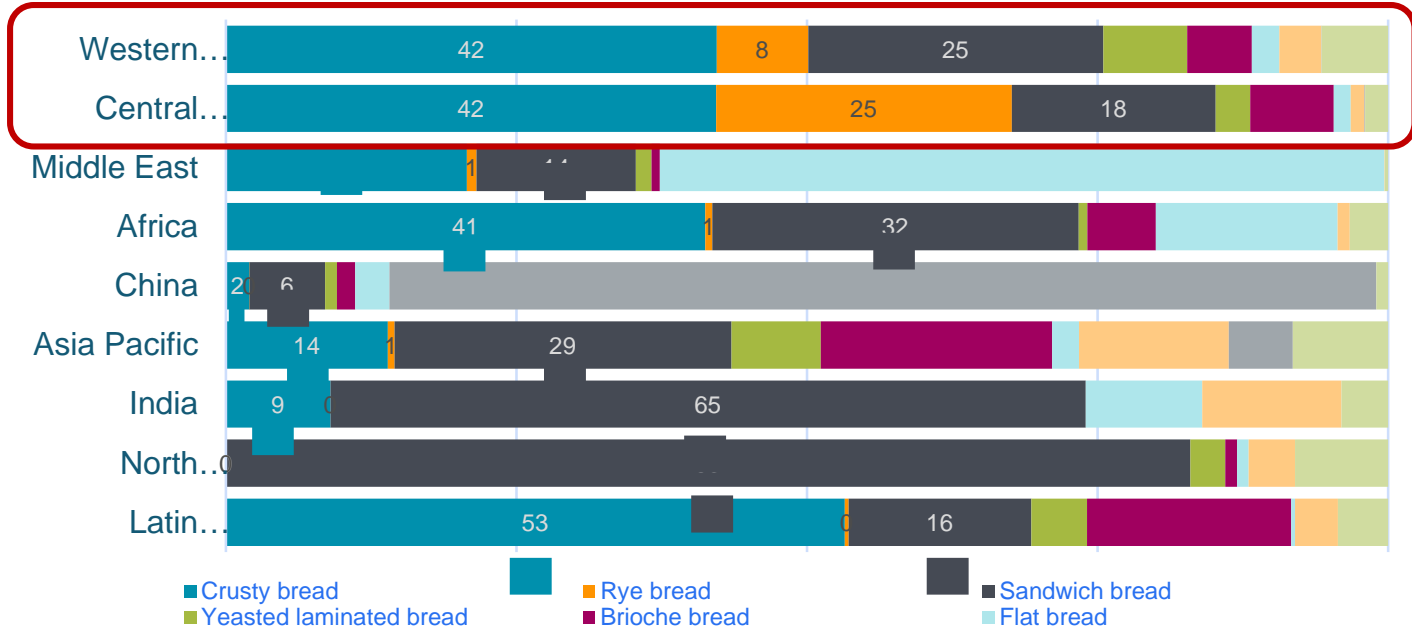
3 bread types dominate most of global bread consumption



# Main bread types

In Europe, crusty bread, rye bread and tin bread dominate

Europe has the widest variety of bread in the world and remains a source of inspiration for the rest of the world



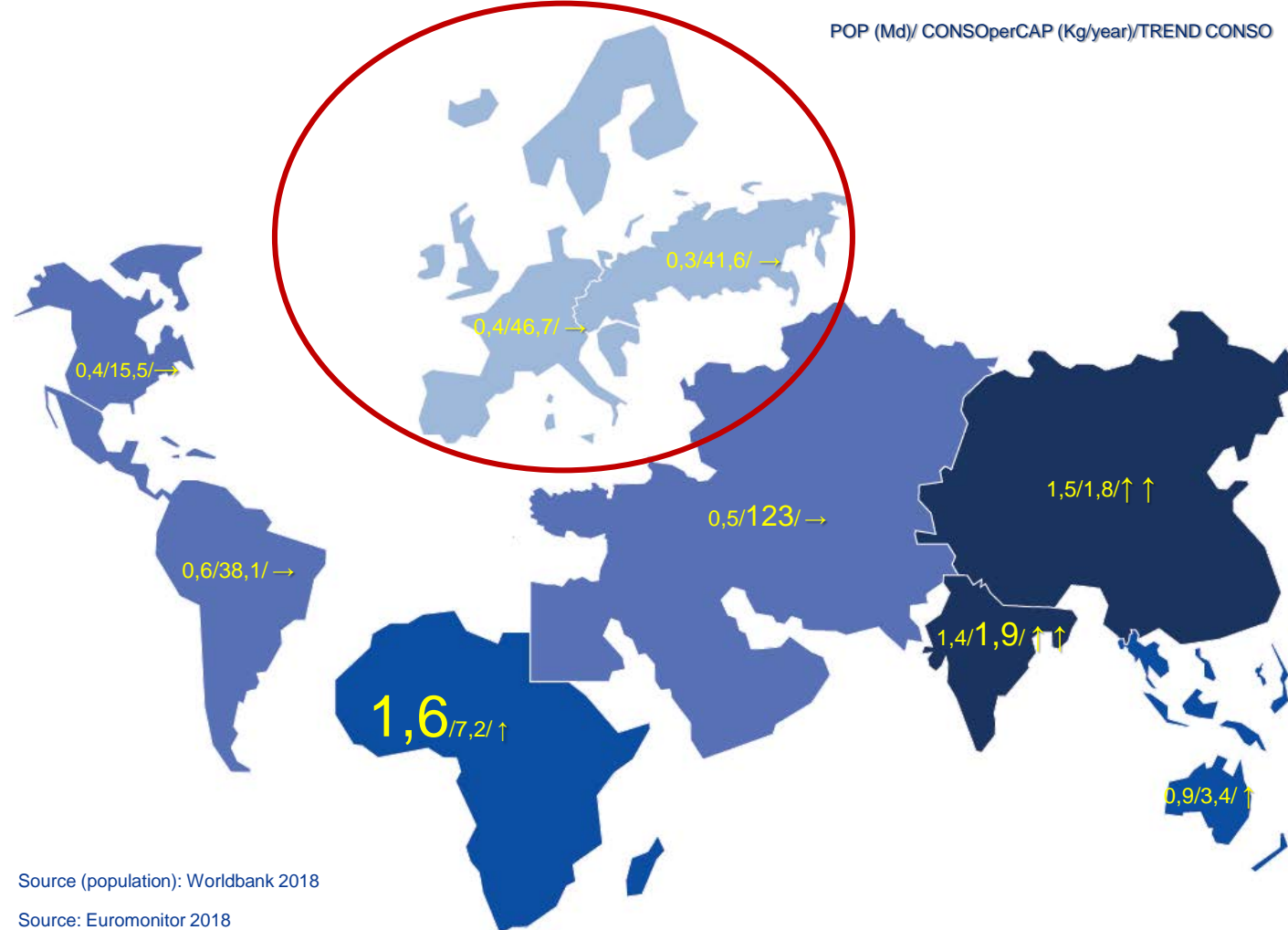
Source: Lesaffre, 2019



# Bread market evolution

- Global bread market: +1,8% / year
- Average consumption: 16 kg/cap/year
- Europe: 44 kg/cap/year
- Europe = 27% of total bread market

POP (Md)/ CONSOperCAP (Kg/year)/TREND CONSO



Source (population): Worldbank 2018

Source: Euromonitor 2018

# Global bread market

Top 10 countries :  
55% of global market

**MATURE MARKETS**

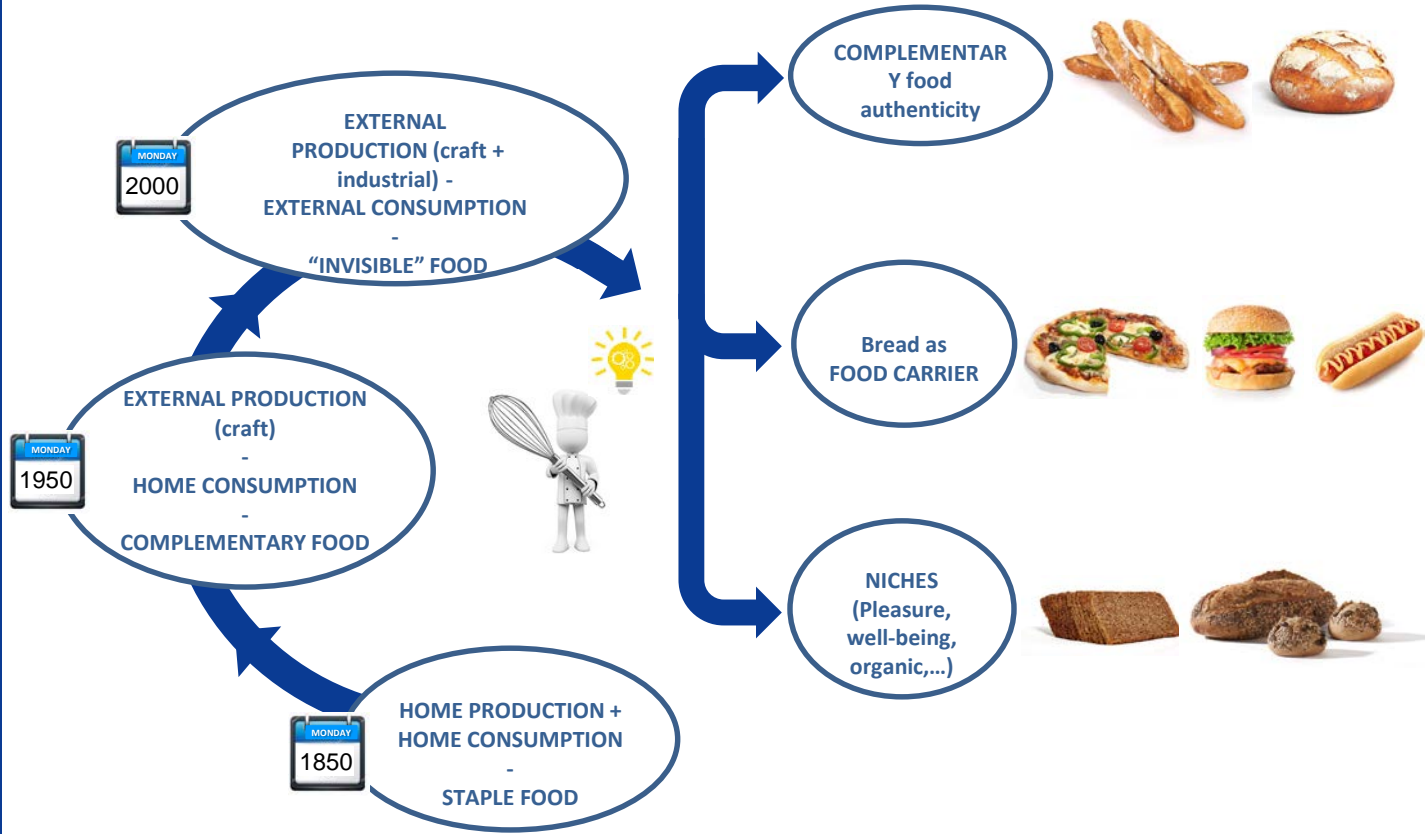


**GROWING MARKETS**

Source: Lesaffre

The evolution of the European market towards a mature market

- From home baking to external bread production
- Majority of bread consumption has moved from in home to out of home
- From staple food to functional bread



# Influential factors

Challenging environment  
and optimistic signals

Useful links:  
[objectif-petit-dejeuner.fr](http://objectif-petit-dejeuner.fr)  
[bread-initiative.eu](http://bread-initiative.eu)



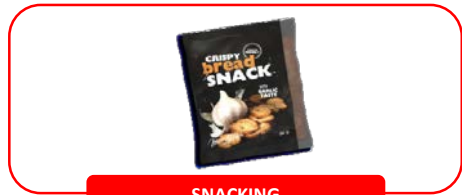
## Negative impact



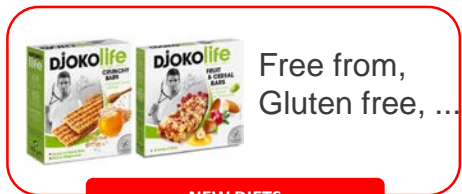
DEMOGRAPHY



ALTERNATIVES



SNACKING



NEW DIETS



## Positive impact



FOOD STYLE EVOLUTION



GOOD PRICE VALUE



"TREND" IMAGE



NUTRITION & WELLNESS



# Fermented baked goods trends

6 mega trends profiling the bread making industry

2 of these represent 80% of packed bread launches\*

\* Source: Mintel 2018

## Lesaffre Trend Vision™



# Pleasure & Convenience trends

Convenience and pleasure remain a major expectation



## NOMADISM

- New places to eat out of home

## SNACKING, SANDWICHES

- All-day eating



## ALWAYS FRESH

- All-day baking

## INDULGENCY

- Premium breads & viennoiserie and large product variety



People are getting more and more conscious about:

- Food and diet impact
- Social and environmental impact of their buying activity



### CALORIE REDUCTION

### ENRICHMENT

- Fibers, Proteins

### PREFERRED INGREDIENTS

- Ancient grains

### ORGANIC



### LOW ENVIRONMENTAL IMPACT

- Sustainable agriculture
- Local production

### WASTE CONTROL

- Reduction
- Re-use
- Recycle





**LESAFFRE**



**Commission européenne**

Working together to better  
**nourish and protect the planet**

Web site: [www.lesaffre.com](http://www.lesaffre.com)  
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