

# Baked Goods in Western Europe

April 2021

Table of Contents

## INTRODUCTION

Scope

Key findings

## REGIONAL OVERVIEW

Western Europe the biggest regional market for baked goods

Positive growth rates expected throughout the forecast period

UK, France and Italy add a lot of new sales over 2015-2020

Bread suffering from maturity and an unhealthy image in some markets

Pastries and cakes shine, but bread is in decline

Flatlining post-2020 annual growth rates expected for bread

Food/drink/tobacco specialists still the leading distribution channel ...

...but losing share to discounters and e-commerce

## LEADING COMPANIES AND BRANDS

Big players have very small shares in baked goods

Harry-Brot closes the gap marginally on second-placed Agrofert

Karl Fazer and Lantmännen generate most of their sales in Scandinavia

Mulino Bianco defends the top spot it took over in 2019

## FORECAST PROJECTIONS

France and Italy to add most new sales over 2015-2020...

...but Turkey to slip back into posting losses again

Hard drivers will just about offset the negative impact of soft drivers

## COUNTRY SNAPSHOTS

Austria: Market Context

Austria: Competitive and Retail Landscape

Belgium: Market Context

Belgium: Competitive and Retail Landscape

Denmark: Market Context

Denmark: Competitive and Retail Landscape

Finland: Market Context

Finland: Competitive and Retail Landscape

France: Market Context

France: Competitive and Retail Landscape

Germany: Market Context

Germany: Competitive and Retail Landscape

Greece: Market Context

Greece: Competitive and Retail Landscape

Ireland: Market Context

Ireland: Competitive and Retail Landscape

Italy: Market Context

Italy: Competitive and Retail Landscape

Netherlands: Market Context

Netherlands: Competitive and Retail Landscape

Norway: Market Context

Norway: Competitive and Retail Landscape

Portugal: Market Context

Portugal: Competitive and Retail Landscape

Spain: Market Context

Spain: Competitive and Retail Landscape

Sweden: Market Context

Sweden: Competitive and Retail Landscape

Switzerland: Market Context

Switzerland: Competitive and Retail Landscape

Turkey: Market Context

Turkey: Competitive and Retail Landscape

UK: Market Context

UK: Competitive and Retail Landscape

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