



Délic France
LIVE EVERYDAY DELICIOUS

— PROVE IT 2024 —

BREAKING BREAD

The rise of the £1.2bn UK bread opportunity



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ABOUT



STÉPHANIE BRILLOUET
Marketing Director, Délifrance

"Welcome to our latest report on the UK's ever-evolving bread market. We take a look at the trends shaping the category, from the continued growth of sourdough to the opportunities offered by breads from across the globe.

"We also take a deep dive into consumer attitudes to bread and examine what drives purchasing decisions, how consumption differs in and out-of-home (OOH), and the impact of consumers' environmental and economic concerns.

"We hope the insights, compiled with the help of food trends experts Harris & Hayes, will help you further develop and grow your own businesses.

"We have collaborated on this report with food and drinks trends consultants Harris & Hayes, combining their expertise with our comprehensive research. Harris and Hayes are one of the UK's most trusted food consultants and future forecasters. Leading innovation projects for multinationals and challenger brands, Lisa Harris and Alex Hayes' expertise lies in identifying how early shifts in cultural and social behaviours manifest in food and drink, with a special focus on bakery. Look out for the 'H&H says' comments throughout this report."

METHODOLOGY

We surveyed 1,000 UK adults who regularly eat bread. This report also makes use of Délifrance internal market estimates and insight, external market data and the experience and views of food trends experts Harris & Hayes.

THE EXPERTS



LISA HARRIS
& ALEXANDRA HAYES
Food trends experts, Harris & Hayes



1: THE MARKET

BREAD MARKET SNAPSHOT

KEY BAKERY TRENDS

Currently worth £7.8bn*, the UK bread market is forecast to grow by more than £1bn by 2026



MICRO BAKERY, MACRO IMPACT

Smaller bakeries are influencing mainstream flavours and formats through the power of social media, and cater to consumers who value quality and community above price.



REGENERATIVE BREAD

Consumers are seeking bread that is better for them and the planet. The trend for clean-label continues in the context of concerns over ultra-processed foods, as well as traceable ingredients with the power to restore our land for



CONSCIOUS CONSUMPTION

Rather than avoiding bread, health-conscious consumers are opting for bread with benefits such as high fibre or protein content, or to cater to specific diets.



BREAD BUDGETS

Consumers may flex their spending within the category, with speciality loaves positioned as an everyday luxury, and budget formats as a functional essential.

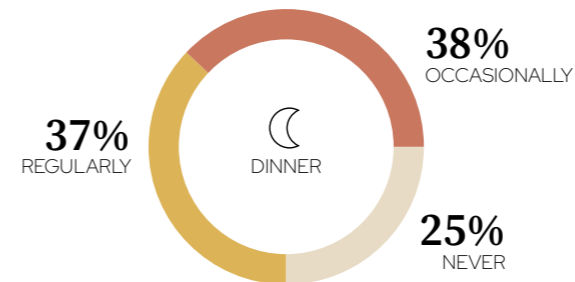
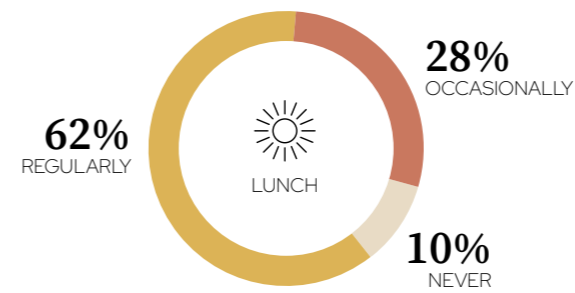
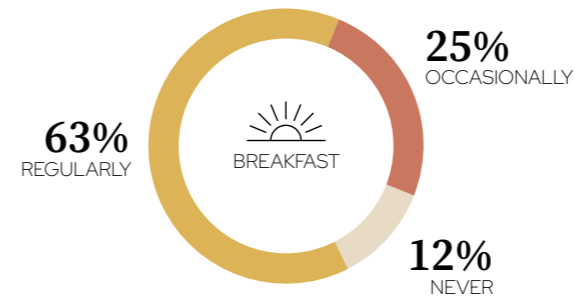


SPECIALITY PRODUCTS

Suppliers are drawing inspiration from international formats, flavours and regional specialties to bring something new to the category.

OCCASION, OCCASION, OCCASION

WHEN IS BREAD EATEN?



Breakfast and lunch are the biggest mealtimes for bread, with toast and sandwiches offering consumers simple, familiar options.

In many cases, consumers are choosing between having bread either for breakfast or lunch. Our survey revealed that **75% of people who never have bread at breakfast eat it regularly for lunch**, and **69% of people who never have bread at lunch eat it regularly at breakfast**.

Bread is eaten less regularly at dinner, and there is an opportunity to encourage more people to eat bread as an accompaniment to evening meals. This could boost bread consumption among those who rarely eat bread, as the **13% who say they eat bread just once a week are the most likely to be having bread at dinner time**.



STÉPHANIE BRILLOUET
Marketing Director, Délifrance



"Consumers' love of bread shows no sign of slowing and, with the UK market forecast to rise 15% in value to £9bn in the next two years, there is a huge opportunity for retailers and suppliers to take a slice of this growth by aligning with innovative solutions and embracing the evolving trends in the bread category. As consumers' passion for bread remains steadfast, it is important to craft unique, quality offerings that resonate with changing preferences."



LISA HARRIS & ALEXANDRA HAYES
Food trends experts, Harris & Hayes

"Bread is a ritualised food, embedded in deeply familiar foods like toast and sandwiches, which are consumed the same way, at the same time, every day. Unlocking that ritual and commitment is key to becoming a fixture on a consumer's shopping list."

* Délifrance estimate



2: THE CONSUMER

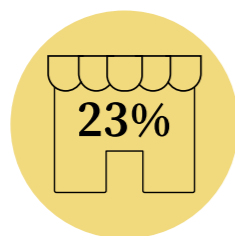
BREAD CONSUMPTION

GROWTH IN AND OUT-OF-HOME

Who's eating more bread?



25% OF AT-HOME CONSUMERS ARE EATING MORE BREAD



23% OF OUT-OF-HOME CONSUMERS ARE EATING MORE BREAD

18% of consumers say they are eating more bread at-home and out-of-home, while 6% are eating less at-home and out-of-home.

In good news for out-of-home businesses, 70% of consumers who are eating more bread at-home say they are also eating more bread out-of-home.

A MATTER OF TASTE

Taste is a key driver of growth in bread consumption, with 41% of consumers saying they buy bread for the taste. This is second only to freshness, which was cited by 44% of consumers.



Those who increased their out-of-home bread consumption are more likely to be buying:

- Italian breads
- Breads of the world
- Brown and wholemeal
- Rye
- Sourdough

Those who increased their in-home bread consumption are more likely to be buying:

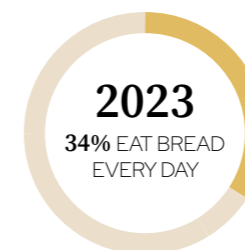
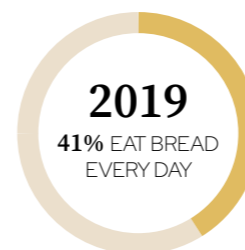
- A fresh loaf from a bakery or bakery counter
- Rolls
- Italian breads
- Breads of the world
- Sourdough



LISA HARRIS & ALEXANDRA HAYES
Food trends experts, Harris & Hayes

"If consumers are generally eating more bread, they are doing so both at-home and out-of-home. There's therefore an opportunity to capture this audience in both locations, as long as the format is convenient, inspiring and relevant to each occasion."

TAPPING THE TIKTOK GENERATION

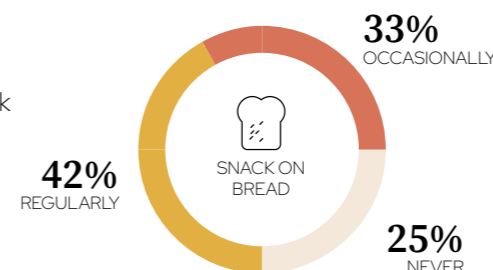


Fewer consumers are eating bread every day, and younger consumers are less likely to do so.

This presents an opportunity to engage with young people and make everyday bread more relevant to them.

SNACK ATTACK

How often do consumers snack on bread?



Snacking is a huge opportunity for businesses that sell and supply bread-based products.

The snackification of food shows no sign of abating, and snacks are now an established part of food routines in-between breakfast, lunch and dinner, with many food and drink products being adapted to tap this demand.

It is likely the cost-of-living crisis is driving demand for affordable evening snacks as consumers look to save money by staying at-home rather than go out as frequently.

WHO IS SNACKING ON BREAD?

The 42% of consumers who say they regularly snack on bread are more likely to:

- Have children at-home
- Have increased at-home and OOH bread consumption
- Buy from convenience stores and forecourts
- Buy Italian breads and other breads of the world
- Think product range is important when choosing an OOH location to buy products from, with a particular interest in newness and seasonality



LISA HARRIS & ALEXANDRA HAYES
Food trends experts, Harris & Hayes

"TikTok fuelled trends like #TinnedFishDateNight and #GirlDinner highlight how younger consumers will fervently transform the everyday into an occasion, as long as it fits with their lifestyle."



LISA HARRIS & ALEXANDRA HAYES
Food trends experts, Harris & Hayes

"Snacking has driven innovation across the food and drink market, with mini-formats, healthier twists, drinkable versions, sweet/savoury mash-ups and functional ingredients transporting brands and products to the snack aisle. As a convenient and versatile base, which can carry a huge range of flavours and international formats, bread fits into multiple snacking moments throughout the day."





3: TOP TRENDS INFLUENCING THE CATEGORY

VALUE VS PREMIUMISATION

GOOD VALUE DESPITE PRICE HIKES

Soaring prices and the cost-of-living crisis have made it a tough time for all areas of the food and drink market.

The average retail price of an 800g loaf of bread has risen more than 30p in the past two years (ONS data) and, although prices have eased a little, they remain much higher than previous levels.

Despite this, bread has fared better than many categories thanks to consumers seeing it as good value.

Over a quarter of consumers cite a drop in their household budget as a reason for increasing their in-home consumption of bread. Additionally, 20% point to financial considerations as a driving force behind their increased out-of-home consumption

Inevitably money concerns have curtailed consumer bread purchases, with 21% of those buying less bread for home consumption citing cost or financial reasons.

Yet, amidst these economic challenges, the steadfast reputation of bread as a reliable and affordable staple prevails.



STÉPHANIE BRILLOUET
Marketing Director, Délifrance



"Much-loved, staple foods have a special role to play at times of upheaval and, with consumer budgets under intense pressure, bread offers affordable comfort."



LISA HARRIS & ALEXANDRA HAYES
Food trends experts, Harris & Hayes

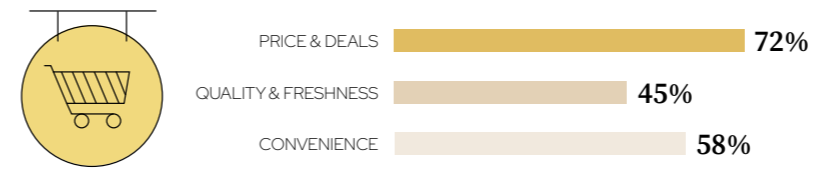
"Price perception is vital to both upward and downward consumption trends, and suppliers should make a clear distinction on what they're delivering for the price."



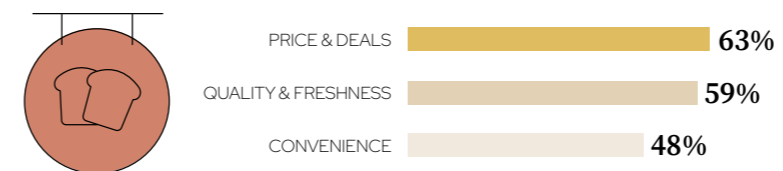
THE ROLE OF PRICE IN SANDWICH PURCHASES

Biggest factors when buying sandwiches to eat out-of-home from:

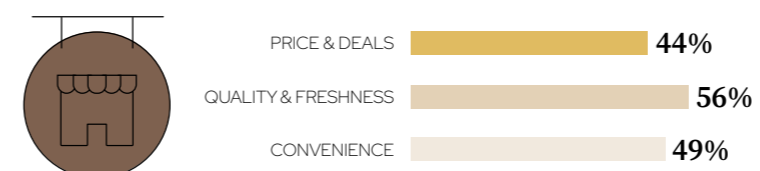
Supermarket



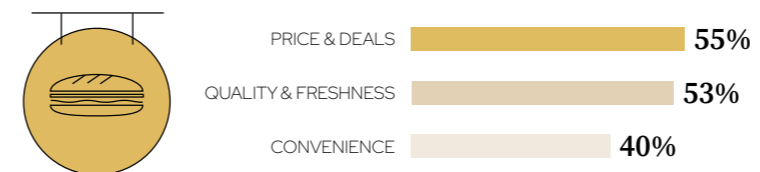
Bakery chain



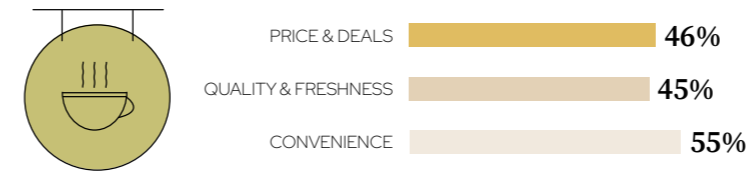
Independent café



Sandwich shop



Coffee shop



Price and a tempting meal deal top the list of factors shoppers consider when buying a sandwich or bread product to eat out-of-home.

Almost two-thirds (61%) say price or deal is the biggest reason for making their choice, a major shift on 2019, when just 34% said price was the biggest reason.

For shoppers buying bread to eat at-home, quality/freshness was the key reason, at 68%, followed by price at 51% and convenience at 46%.



LISA HARRIS & ALEXANDRA HAYES
Food trends experts, Harris & Hayes

"In this current 'crisis culture', with the cost of living, political upheaval and threats to food supply chains, consumers are making tough food choices. They want innovative formats and flavours, but ultimately price is a driving factor."

QUALITY REMAINS KEY

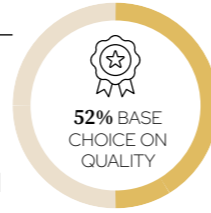
Despite the pressure of the cost-of-living crisis, quality remains a key factor when buying bread and bread-based products.

Driven by growing consumer demand for premium loaves supplied by independent bakeries, supermarkets and out-of-home operators are increasingly offering handcrafted and higher-end bread products.

This has led to the rollout of authentic long-fermentation bread, the use of a variety of grains and flours, premium inclusions and the introduction of less common formats and bread styles.

It has also seen the launch of premium ranges such as the M&S Collection Sourdoughs and more recently, new barley & rye rolls from Pret.

More than half of consumers (52%) say they choose where to buy bread and bread-based products from, based on the quality of products sold, and these consumers are most likely to shop at independent bakeries and supermarket ISBs.



The research showed that those who shop at independent bakeries are particularly likely to prioritise quality above price or convenience.

With consumers demanding a better overall shopping experience when it comes to fresh food departments, brands are responding with a 'market or specialists within a store' approach.



Tesco has rolled out its The Bakery in-store bakery format following a successful trial, while Waitrose has extended its partnership with Gail's and created branded Gail's fixtures. In both cases, this is enabling the retailers to further tap demand for speciality breads and sourdoughs.

Discounters are also embracing demand for the ISB experience at competitive price points, with Home Bargains rolling out ISBs, now in more than 60 stores.

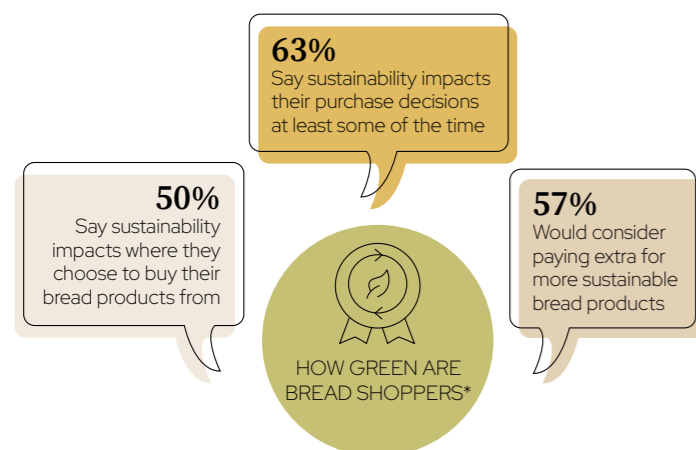


LISA HARRIS & ALEXANDRA HAYES
Food trends experts, Harris & Hayes

"Consumers are increasingly looking for authentic shopping experiences and artisan-inspired bakery products. We are seeing supermarkets trying hard to replicate the independent bakery experience, but at a more accessible price point. By focusing on traditional styles and executions, and by using high-quality ingredients with provenance, they're drawing in more discerning shoppers looking for 'real' bread."

DO GOOD, FEEL GOOD

SUSTAINABILITY



REGENERATIVE FARMING



Bakers and their suppliers are increasingly sourcing flours from grains produced using regenerative farming.

Also referred to as regenerative agriculture, this is the idea of improving and protecting the health of soil by, for example, planting a diverse range of crops and keeping the soil surface covered.

Interest in regenerative agriculture has increased alongside growing awareness of the harm modern food production processes can do. In a survey conducted for Délifrance report Prove It: The sustainable future of baked goods, **56% of respondents said the first thing the baking industry should do to become more sustainable is use ingredients grown through better agricultural practices.**

As part of its Baking Better Good strategy, Délifrance is developing an integrated supply chain that offers more sustainable products from wheat cultivated through regenerative agriculture practices.

*Délifrance report, Prove It: [The sustainable future of baked goods](#)



LISA HARRIS & ALEXANDRA HAYES
Food trends experts, Harris & Hayes

"Future-proofed products make sustainable living easier for consumers by doing the hard work for them (paper packaging, reduced footprint, using waste ingredients etc), with no compromise on taste, quality and price."



STÉPHANIE BRILLOUET
Marketing Director, Délifrance



"Many consumers are already scrutinising how sustainable products are. This should be taken into account when communicating with these consumers - in your outlet, and in your marketing activity."



STÉPHANIE BRILLOUET
Marketing Director, Délifrance



"Consumer and industry interest in regenerative farming is rising, with some brands and retailers now actively promoting their use of ingredients sourced this way. We're proud to be committed to advancing our business in this area. This holistic approach not only aligns with our values but also resonates with the conscientious choices of today's consumers. Our dedication goes beyond mere participation; we are committed to creating and nurturing a more sustainable and resilient food ecosystem for generations to come."



DÉLIFRANCE: BAKING GOOD BETTER

Our company's mission:

Our roots are in the soil, the grain and our French baking know-how. Together everyday we grow and share this heritage and our love for baking.

Responsibly, creatively, deliciously.

We have structured an ambitious CSR strategy named Baking Good Better. 'Better' means taking action now all together and ensuring sustainability is at the heart of everything we do to protect what is most precious: our planet and our people.

To find out more, visit: www.delifrance.com/uk/our-csr-approach-baking-good-better



DÉLIFRANCE: NO WASTE ALL TASTE

We have developed the No Waste All Taste initiative to help operators combat food waste. Our bank of recipes, crafted by our chefs, demonstrates how to upcycle yesterday's bread or viennoiserie to create dishes customers will love, rather than throwing them away.

To find out more, visit:

www.delifrance.com/nowastealltaste



STÉPHANIE BRILLOUET
Marketing Director, Délifrance



"We hope that, as an industry, we can help one another reduce our carbon footprint and achieve our common goal of contributing to carbon neutrality."



NO WASTE ALL TASTE RECIPE:

VEGGIE BALLS

Ingredients:

200g of the previous day's bread
Carrots: 100g
Leeks: 100g
Courgettes: 100g

Butter: 20g
Eggs: 150g
Olive oil: 45g
Curry powder: 16g
Salt

Preparation : 20 min

Method:

- Dice carrots and courgettes very finely
- Chop leeks very finely
- Fry leeks in butter
- Chop bread into small cubes and pour into a mixing bowl with olive oil and eggs
- Mix with the leaf attachment until you obtain a fairly homogenous mixture
- Add the vegetables and curry powder, and mix again
- Spoon small dumplings of the mixture onto a baking sheet on a tray. Leave to cool in refrigerator for 30 minutes
- Roll the balls by hand and place on a baking tray
- Spray surface of the dough balls with olive oil then bake for 8 minutes at 180°C (turn over halfway through cooking)

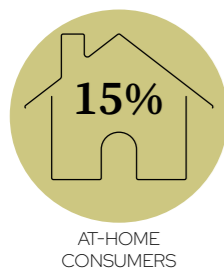
HEALTH

Health concerns - both positive and negative - have a big impact on bread consumption.

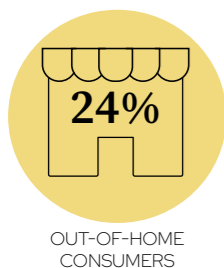
Almost a third (30%) of consumers who are eating **MORE** bread at-home and out-of-home are doing so for health reasons.

Meanwhile, 40% of consumers who are eating **LESS** bread at-home and out-of-home cited health as the reason.

WHO IS EATING **MORE** BREAD FOR HEALTH REASONS?

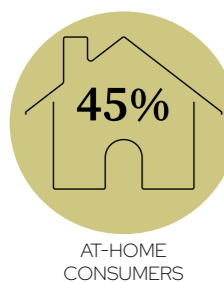


At-home: **15% of those who have increased their at-home consumption of bread have done so for health reasons.** They are more likely to be buying sourdough, especially brown, wholemeal, seeded and rye sourdoughs.

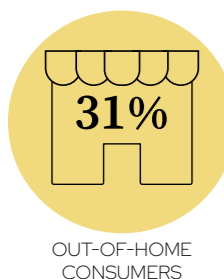


Out-of-home: **24% of those who have increased their out-of-home consumption of bread have done so for health reasons.** They are more likely to be buying wraps/tortillas and ciabattas OOH.

WHO IS EATING **LESS** BREAD FOR HEALTH REASONS?



At-home: **45% of those who have decreased their at-home consumption of bread have done so for health reasons.** They are more likely to be female and 55+, and are more likely to be buying brown, wholemeal and seeded products.



Out-of-home: **31% of those who have decreased their out-of-home consumption of bread have done so for health reasons.** They are more likely to be looking for brown, wholemeal, seeded and sourdough sandwich carriers.



STÉPHANIE BRILLOUET
Marketing Director, Délifrance



"Our research found health is a key factor in purchasing decisions, so businesses should ensure they make consumers aware of health benefits such as the high fibre or high protein content in certain styles of bread."



FUNCTIONAL BREAD

Breads with added benefits offer a big opportunity to attract health-conscious consumers, and there is no sign of a slowdown in launches of functional loaves.

High fibre has been a popular health claim for some time now, and brands continue to expand ranges with higher-fibre loaves featuring added seeds and grains.

Inclusions such as seeds, grains and pulses are enabling some bakers to make high-protein claims on loaves, while a growing niche market is targeting consumers seeking low-carb bread.

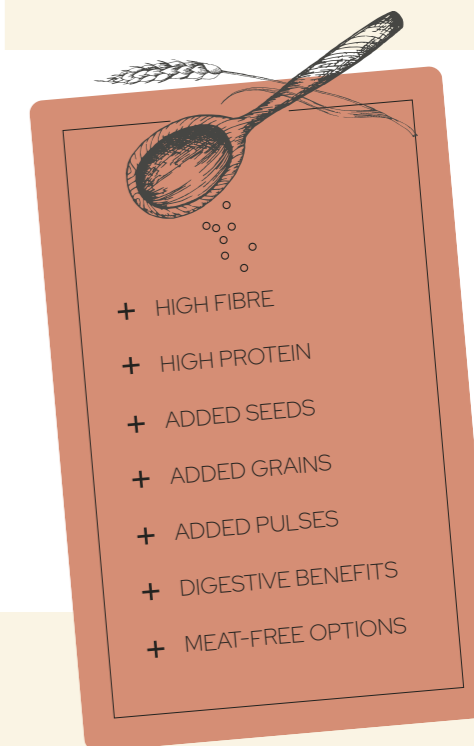
The **digestive benefits of long-fermented breads** such as sourdoughs mean these can tap the healthier eating market.

Bakery is also well placed to meet the demands of specialist diets such as meat reduction and veganism, and many shops and out-of-home businesses now offer a wide range of innovative **meat-free sandwiches and wraps**.



LISA HARRIS & ALEXANDRA HAYES
Food trends experts, Harris & Hayes

"We are moving to a more personal and diversified approach to health. Rather than demonisation, consumers are making sense of the noise and choosing wholegrain 'nose-to-tail' style bread that uses all parts of wheat, seeking out formats for glucose absorption, or products with added health benefits."



DÉLIFRANCE IS PROUD TO OFFER A RANGE OF FUNCTIONAL BREADS INCLUDING



Hand-crafted carrot and seed roll

A rustic, crunchy crust and a soft crumb packed with a mix of seeds (pumpkin, sunflower and flax seeds) and pieces of carrots.



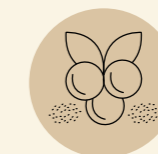
Half-baguette with beetroot and seeds

A hand-shaped half-baguette featuring pieces of beetroot and corn, and a mix of flax, pumpkin and sunflower seeds.



Hand-crafted spelt and seeds roll

With a sesame seed and poppy seed topping.



Half-baguette with chia & cranberries

A hand-shaped half-baguette made with spelt flour, cranberries and chia.

4: BREADS TO WATCH

SOURDOUGH

EVOLUTION OF SOURDOUGH

While the sourdough process dates back thousands of years, the category continues to develop at a rapid pace in the 21st century.

In the previous Délifrance bread report, just 6% of respondents said they were eating sourdough regularly – today 32% are buying sourdough to use at-home and 29% seek sourdough carriers when eating out-of-home.

Sourdough loaves made the leap from independent, artisan bakeries to in-store bakery fixtures some years ago and are now increasingly seen on wrapped bread fixtures as a wrapped and sliced bread. More recently, sourdough is also developing a presence in the ambient bake-at-home category.



LISA HARRIS & ALEXANDRA HAYES
Food trends experts, Harris & Hayes

“Sourdough has been experiencing strong growth, with sourdough products accounting for a significant boost to value sales within the speciality bread category. Micro bakeries have driven awareness and demand for sourdough and there’s greater understanding around the health benefits, coupled with the quality and flavour perception.”

FERMENTATION TYPES



Fermentation has captured the attention of bakers and consumers alike. The meticulous application of different fermentation techniques create a unique magic to the dough which ultimately shapes the character of the bread.



STÉPHANIE BRILLOUET
Marketing Director, Délifrance



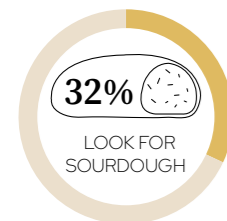
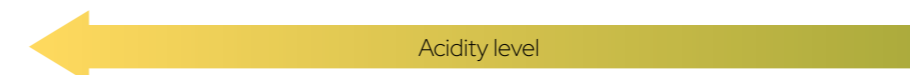
“Interest in sourdough continues to grow, and both retail and foodservice operators should stock products that can tap this demand while helping consumers understand the flavour qualities and potential health benefits of these delicious breads.”

Pre-ferments contribute to the colour and flavour of both crust and crumb, providing crunchy crust and open, moist, airy, crumb structures. Here we look at the three key pre-ferments used in bread making.

 <p>Sourdough Claimed origin in Egypt between 4000 and 2000 BCE</p>	 <p>Polish Developed in Poland in 19th century, typically used in French bakery products</p>	 <p>Biga Developed by Italian bakers, following discovery of Baker’s yeast in the 19th century</p>
<p>Uses natural ferments (bacteria and wild yeast)</p>		<p>Uses a little bakers yeast</p>

Did you know...?

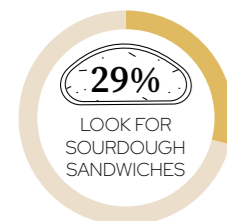
The name biga comes from Roman Chariot for its capacity to “pull the dough”



WHO IS BUYING SOURDOUGH TO USE AT-HOME?

32% of people look for sourdough when buying bread to make sandwiches.

These consumers are more likely to be under 45, and to be buying from in-store bakeries, chain or independent bakeries. Product quality, range and level of service are important to sourdough shoppers, who want variety, seasonality and knowledgeable and approachable bakery staff.



WHO IS BUYING SANDWICHES MADE WITH SOURDOUGH?

29% of people look for a sourdough bread carrier when buying sandwiches

These consumers are more likely to be under 45 and to be buying sandwiches from sandwich shops, coffee shops, independent bakeries and cafés, or chain bakeries. The bread is important to those looking for sourdough – both in the ingredients and format of the bread, with baguettes, rolls, bloomer slices and other breads of the world popular.

THE DÉLIFRANCE MOTHER DOUGH

At Délifrance, we have developed our own mother dough (sourdough starter) capability to be able to produce real sourdough breads at scale. We have invested time and care into upskilling our employees and processes to create sourdough products that are hand-crafted and free of additives.



BREADS OF THE WORLD

Breads from outside the UK give businesses the chance to bring further excitement to the bakery fixture and innovation to a menu.

Ciabatta, focaccia, panini, bagels, flatbreads and wraps have become mainstays of the UK market but there are opportunities to widen their appeal and to introduce new breads to British consumers.

With international travel resuming post-pandemic, consumers are rediscovering the joy of exploring and savouring breads from diverse countries. This should serve as inspiration for suppliers and retailers to broaden their offerings, with breads from around the world.

And, with a quarter of consumers having said they don't eat bread at dinner time (see page 7), breads from outside the UK may be able to tap into this market as meal accompaniments or even as the core element in a meal.



40%
BUY BREADS
OF THE WORLD

WHO IS BUYING BREADS OF THE WORLD TO EAT **AT-HOME**?

40% of consumers opt for global bread varieties to enjoy at-home.

These shoppers are **slightly more likely to be female, under 45 and to have children in their household.**

They are likely also to be purchasing sourdough breads, seeded breads and breads with inclusions, and to be shopping at in-store bakeries, bakery chains and independent bakeries.

This gives suppliers and retailers an opportunity to add further value to the market by meeting demand for more exciting, premium breads. Shoppers who buy breads of the world to eat at-home are **more likely to have increased their consumption because there are better options available (27% vs 23% average) and because of cultural influences (19% vs 11% average).**



56%
LOOK FOR BREADS
OF THE WORLD

WHO IS BUYING BREADS OF THE WORLD TO EAT **OUT-OF-HOME**?

When selecting sandwiches for consumption outside the home, 56% of consumers actively seek breads of the world.

Shoppers buying sandwiches made with breads of the world are **more likely to be 18 to 24 years old and to be buying them from sandwich shops, coffee shops, bakery chains, independent cafés and bakeries, forecourts and hotels.**

Although white bread products remain most popular, interest is growing in brown, wholemeal and sourdough breads of the world sandwich carriers.



**LISA HARRIS &
ALEXANDRA HAYES**
Food trends experts, Harris & Hayes

"Consumers are looking for bread experiences beyond the familiar, with demand rising for speciality loaves. Bread is a staple in so many countries, which means internationally inspired NPD provides scope for increased consumption."

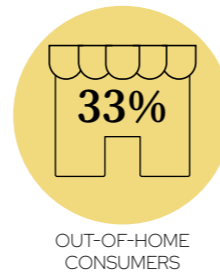
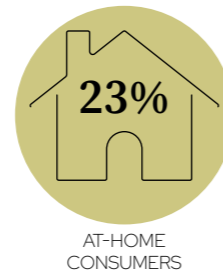
ITALIAN BREADS

WHO IS BUYING ITALIAN BREADS?

Shoppers and consumers of Italian breads, both in and out-of-home **prioritise freshness, taste and quality**. Visual cues are very important, as consumers of Italian bread are more likely to want more rustic looking breads.

For at-home use, shoppers are most likely to buy Italian breads from in-store bakeries, bakery chains and independent bakeries.

For out-of-home consumption, they are more likely to purchase Italian sandwich carriers from independent cafés and bakeries, coffee shops and sandwich shops.



ITALIAN BREAD STYLES

Ciabatta Distinguished by its airy crumb and crisp crust, this has a subtle flavour often enhanced by a hint of olive oil. A staple of Italian cuisine, it is perfect for sandwiches and bruschetta.

Panini This has a soft, cream-colored crumb and a thin crust. Filled with a variety of ingredients, it is then pressed and toasted, giving it a crispy texture on the outside and a warm, melt-in-the-mouth interior.

Tartaruga With an aerated crumb produced by high hydration, these rolls typically feature a checkerboard 'turtle shell' pattern. They are ideal for use as a sandwich or burger bun.

Gransole semolina A traditional bread from the south of Italy, this is made with durum wheat semolina and has a crispy crust and soft and airy crumb.

Focaccia This flat bread is characterised by a soft texture and crispy crust, sprinkled with salt and olive oil. Suitable for use as a meal accompaniment or a sandwich.

Pinsa A traditional Roman flat bread with a crispy crust, soft crumb and high hydration. Suitable for filling as a sandwich or meal accompaniment.

Piadina Originally from central Italy, this is a thin, round flatbread usually made from flour, lard, salt and water. It is typically filled and eaten as a sandwich.

Bastoncino A small crunchy bread stick, often sprinkled with salt, herbs, olives or grated cheese. This is suitable for dipping in sauces, as an aperitif, a snack or an accompaniment to soup.



STÉPHANIE BRILLOUET
Marketing Director, Délifrance



"Italy is a country where cooking has been elevated to an art form, and Italian cuisine is the most popular in Britain. With our Panitaly bread range, Délifrance offers a wide range of Italian breads made with traditional processes including the biga fermentation technique to deliver exceptional and authentic taste."

SANDWICH FLAVOURS & FORMATS

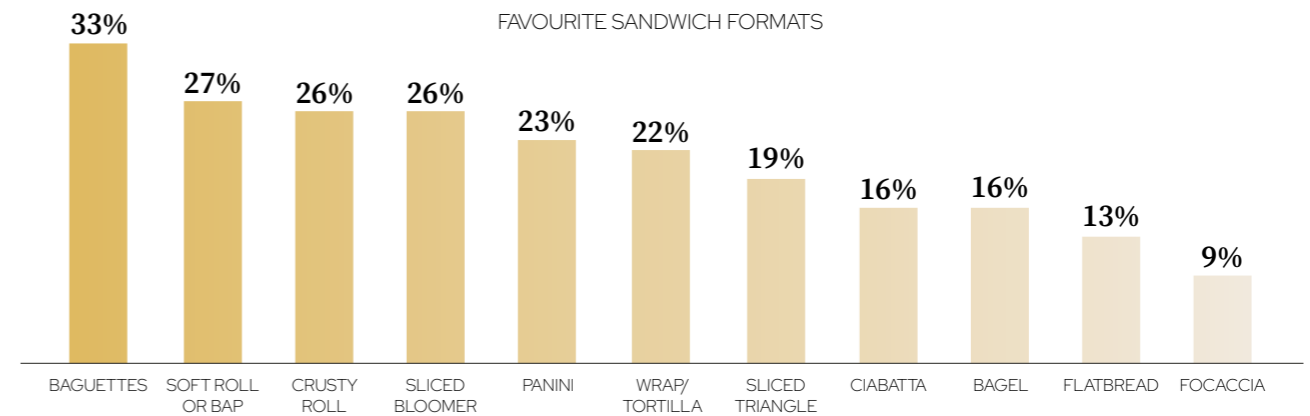
It is impossible to understate the role of sandwiches in the UK bread market.

64% of the bread eaten out-of-home at breakfast time are bought sandwiches, a figure that rises to 78% when it comes to lunchtime bread consumption.

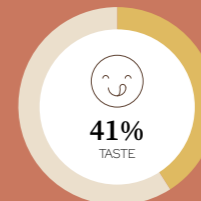
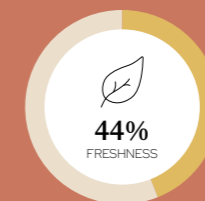
This reflects the preference for convenient options rather than pre-making and eating packed lunch sandwiches.

But sandwich buyers cannot be taken for granted, and businesses should keep them engaged by offering a varied and evolving range of sandwich carriers.

Our research revealed plenty of love for the classics - baguettes, rolls and sliced bloomer bread but, as shown below, there is also a lot of interest in products such as wraps and Italian breads.

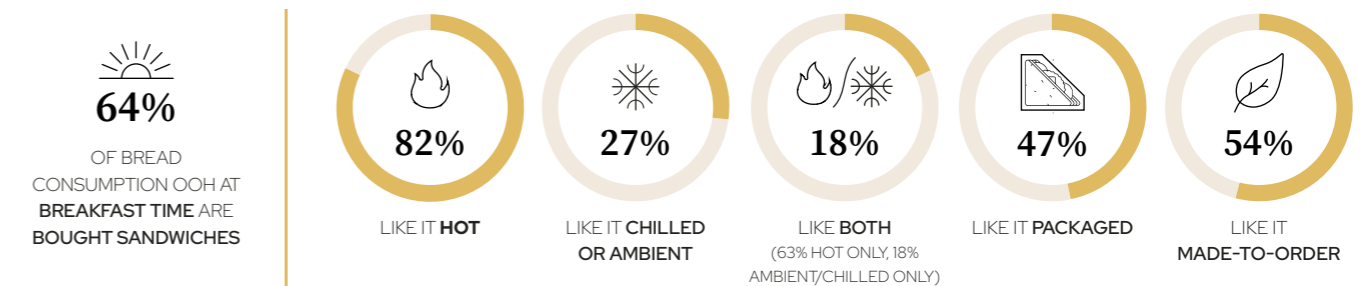


* Note: When combined, Italian-style breads scored 33%

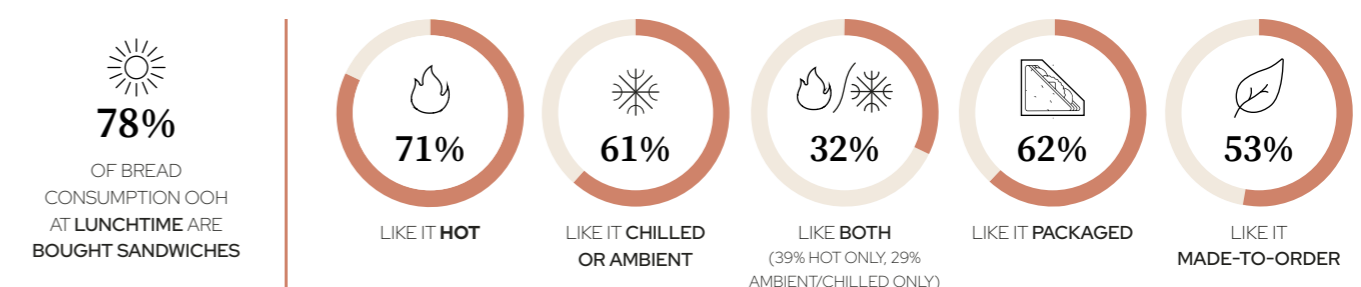


Freshness & taste are the most important factors when choosing bread to make sandwiches with at-home.

OUT-OF-HOME BREAKFAST SANDWICHES



OUT-OF-HOME LUNCHTIME SANDWICHES




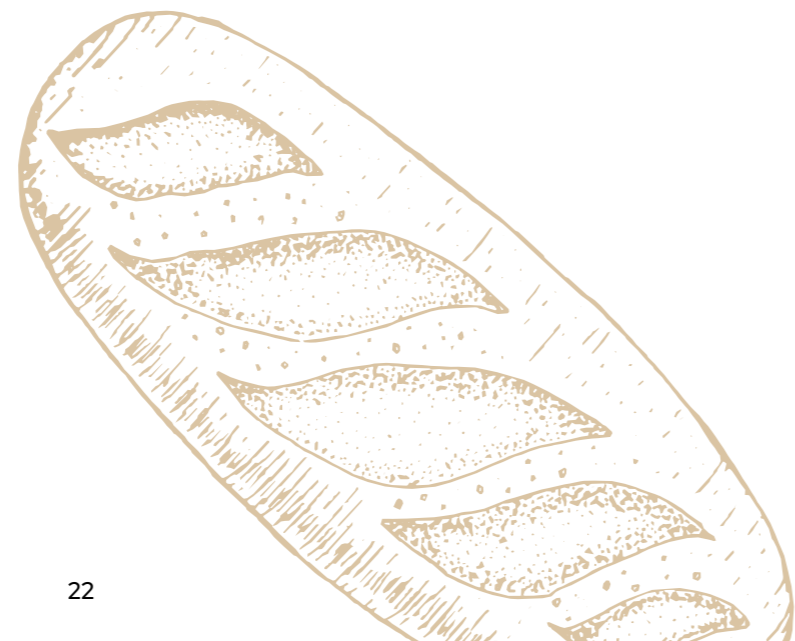


MOST POPULAR SANDWICHES:

So we've seen what the favoured sandwich carriers are, but what about the fillings?

TOP 5 FILLINGS AND THEIR BEST CARRIERS:

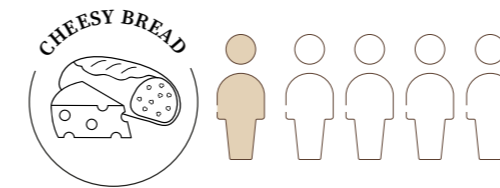
-  **NO. 1 Cheese**
best between two slices of bloomer bread
-  **NO. 2 Chicken**
best held in a baguette
-  **NO. 3 BLT**
maximum texture contrast with a crusty baguette
-  **NO. 4 Ham**
simply served on a soft roll or between slices of bloomer bread
-  **NO. 5 Egg**
on slices of bloomer bread or in a soft roll



TREAT ME!

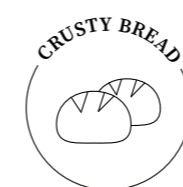
One thing that has been reinforced to us is that bread isn't just a functional everyday staple, it is also a safe space for consumers to experiment with other cuisines and unfamiliar ingredients, and it can even be seen as a real treat.

The biggest treat is one of the simplest - super soft white bread for sandwiches. When we crave something comforting, this is the type of bread we turn to. It's easy, it's quick, and it can be used as a great quality base for whatever other ingredients we have to hand - a true dressed up basic.

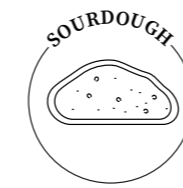


1 in 5 consumers told us their ultimate treat is snacking on cheesy bread. Again, this has elements of comfort and convenience. As we've seen on the previous page, cheese is the most popular sandwich filling, so what could be better than a bread that already has cheese in it?

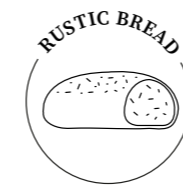
Other treat breads include:



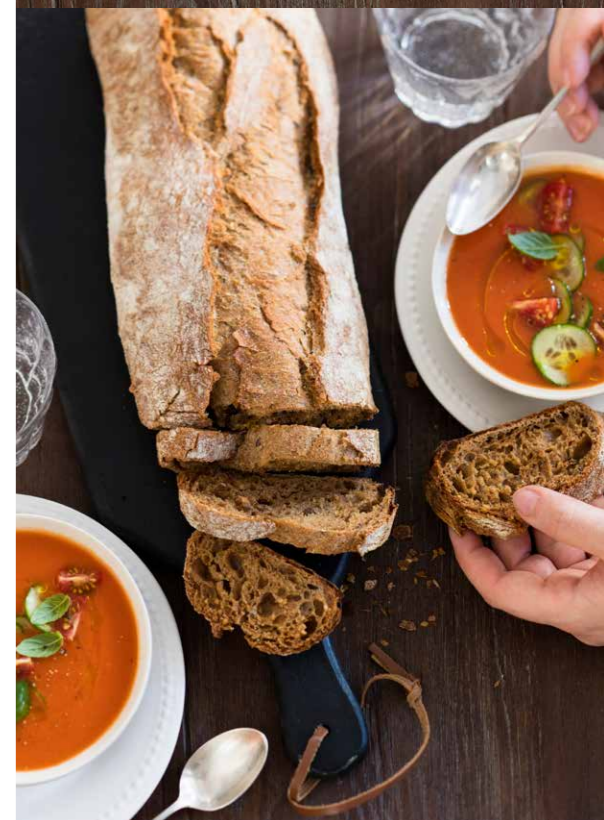
Crusty bread to soak up soups or sauces. As well as being a filling meal accompaniment, crusty bread also helps consumers get their money's worth by helping to mop up every last drop.



Thick slices of sourdough for weekend brunches and lazy breakfasts. We've seen in the report that sourdough is becoming increasingly popular, and indeed is called out on more and more breakfast and brunch menus, whether it be toasted and paired with avocados, or served with egg-based dishes like shakshuka.



Rustic seeded breads for open sandwiches. Scandinavian cuisine continues to inspire menus, with smoked and cured fish, raw onions and sliced pickles among popular toppings to use for smørrebrød.



5. FINAL WORDS



STÉPHANIE BRILLOUET
Marketing Director, Délifrance

"We hope this report has given you plenty of food for thought.

Compiling it has reinforced for us how varied and vibrant the UK bread market is, and that there are many opportunities - and a few challenges - for those who operate in it.

As shown in these pages, environmental and health concerns loom large for many consumers, but bread is well placed in this regard. Clean-label products and sourcing strategies such as regenerative farming can help meet these concerns head on while tapping the growing interest in authentic products with a story behind them.

Those authentic products - such as sourdoughs and breads of the world - carry a premium for suppliers and retailers, and our research has shown many consumers value quality and freshness above price.

Financial pressure will continue to be an issue for businesses and consumers in the months and years ahead but, again, the bakery industry is in a good position.

Bakers and those that sell their wares have been providing affordable delights to consumers for hundreds of years, and will continue to do so for hundreds more."



LISA HARRIS AND ALEXANDRA HAYES
Food trends experts, Harris & Hayes

"It's an exciting time for the bakery category, despite ongoing economic pressures on the consumer. Shoppers are responding well to innovation, with regional specialities, snacking and occasion-led bakery representing a significant growth opportunity. Retailers and hospitality providers will benefit from offering considered ranges that cater to a plethora of differing needs and budgets. Tapping into emerging trends is key, with flavour and format NPD that offers variety, without compromising on the core needs of the category."

6. OUR RANGES

At Délifrance, our dedication to quality bread is an integral part of our heritage. Our steadfast commitment to excellence shines through in every delightful bite. With a rich tapestry of expertise and a broad selection of bread options, from loved classics including iconic baguettes and hearty loaves, through to artisan-inspired speciality breads such as our authentic Panitaly range, we take immense pride in surpassing consumer expectations. Our offerings serve as a testament to the meticulous care and dedication we invest in each and every loaf.



Exclusive flavour due to high quality ingredients and bakery know-how



Tasty, genuine and honest Délifrance products.



A wide range of Italian breads authentically made with traditional processes





Délifrance

LIVE EVERYDAY DELICIOUS

To find out more about how we can help you help your customers live every day delicious, please get in touch with the team by contacting us on 0116 257 1871.

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