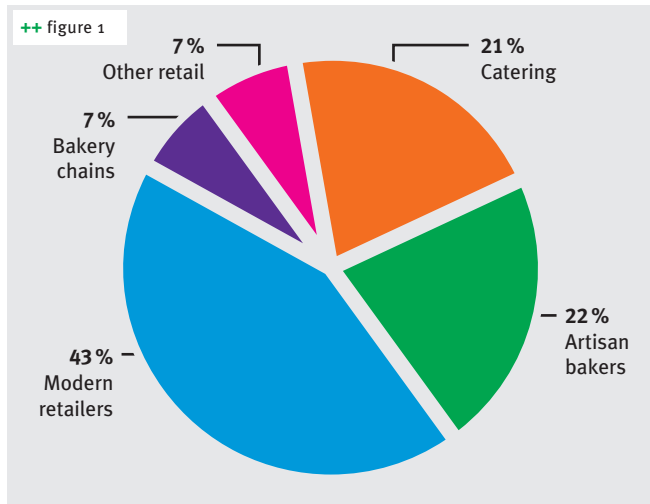


The crisis has rewritten the rules

AT THE AIBI CONGRESS IN AMSTERDAM, NETHERLANDS, ANNE FREMAUX OF THE MARKET RESEARCH INSTITUTE GIRA IN FERNEY-VOLTAIRE, FRANCE, PRESENTED AN OVERVIEW OF DEVELOPMENTS IN THE PAN-EUROPEAN BAKED GOODS MARKET



++ figure 1
Distribution channels for all baked goods in the EU-27 by volume (2011)

+ Anne Fremaux's most important conclusion at the Congress of the Association Internationale de la Boulangerie Industrielle (International Association of Plant Bakers, AIBI) in late May 2013 was: the crisis has changed and polarized the market and has helped make bread more popular, while the growth of indulgence articles is slowing.

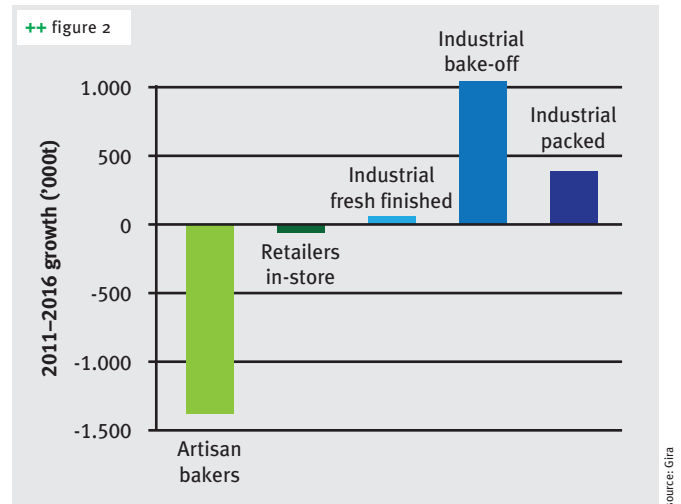
The Gira classification system divides the baked goods market into four sub-markets:

- + Bread (bread, baguettes, bread rolls)
- + Viennoiserie (croissants and Danish pastries, but also cinnamon buns and donuts)
- + Patisserie (pastries, muffins, tarts and cakes, e.g. sheet cakes)
- + Savory snacks (savory filled puff pastries and croissants, savory tarts and gratinated baguettes)

The market researchers estimate that the total market volume of the EU-27 plus Turkey is 40m t, valued at EUR 130bn. Of this, the three biggest markets are Turkey with a consumption volume across all four sub-markets of more than 13m t, Germany with more than 8m t, and France with just over 5.5m t. According to the researchers, the biggest per capita consumptions are in Turkey (179 kg/head), Romania (124 kg/head) and Bulgaria (116 kg/head). Finland, Latvia and Slovenia bring up the rear with 52, 50 and 49 kg/head.

The crisis has halted or slowed down the long-term trends

The Gira market researchers compare the development of various products ranges in five-year periods. In this they discovered that the economic crisis has already clearly left its mark on the European baked goods market. According to



++ figure 2
Growth expectations for baked goods production in the EU-27, 2011 to 2016

their assessment the losses in the bread market will not continue any further, and whereas a slowing down of the previous growth in the viennoiserie and patisserie product ranges is to be expected, there will be no losses.

Considering the 27 countries of the EU, they say it is noticeable that in 2011 the food retail achieved a 43% share of total baked goods distribution in volume terms, and for fresh baked goods it drew level with the artisans for the first time. Fremaux estimates a figure of 38% for the production of bread by artisans in the 27 countries in 2012, and 62% by the industry. The strong growth in bake-off sales in the next five years, together with the smaller growth in off-the-shelf goods, will be almost entirely at the expense of the artisans. According to Fremaux, further polarization in the baked goods market in Europe is to be expected. She says there will be growth both in the lower end of the market with cheap goods and in the premium products market. Bread is and will remain the biggest part of the market in the baked goods sector, and has benefited from the crisis. In her view, the demand for food-to-go and the increasing quality of products and service/diversity in the bake-off sector are playing a growing role in this market. However, there is also an observable trend towards show bakeries, which produce at least part of their goods entirely on the spot. However, this is to be regarded mainly as image enhancement.

Fremaux thinks the biggest risks facing the industry lie in rising costs and raw materials prices and in the growing pressure of the retail on prices and thus on margins, not least as a result of baking stations in discount markets, which of course also sell at discount prices. +++



eco+

The Sveba-Dahlen Energy Saving Challenge

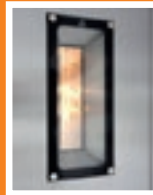
- New eco-friendly and energy efficient technology:

Using SD-touch, it is easy to control the baking process and create smart and energyefficient recipes and cooling/fermentation programs.



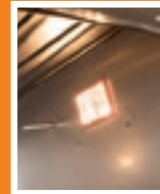
In an eco+ oven, the heat is retained inside the oven, resulting in a cooler and more comfortable working temperature in the premises in which it is installed.

In fermentation cabinets and rack ovens, we now use heatreflective double-glazing with superior insulating properties.



Insulating the bottom of the oven or fermentation cabinet saves substantial amounts of energy. It also prevents damage to floors and further improves fire safety.

Better insulation around the door area gives a more even temperature and baking throughout the oven.



The light in deck ovens with an insulated door is turned off when the door is closed, ensuring that it is never lit unnecessarily. A small, but important energysaving measure.

SVEBA DAHLIN

The baker's best friend®

www.sveba-dahlen.com

With our reliable and user-friendly product range you will have every basis needed for a profitable bakery – high productivity at low operating and maintenance costs. With a complete service and support organisation we make sure your new oven always delivers and you can start baking the same day your new equipment arrives.

Sveba-Dahlen AB, SE-513 82 Fristad, Sweden, phone: +46 33 15 15 00, info@sveba-dahlen.se



- Saves up to 30-percent energy
- Energy-optimised software
- Long-term material selection
- More efficient hardware
- Better working environment

Sveba-Dahlen Group

Scandinavian know-how – worldwide

