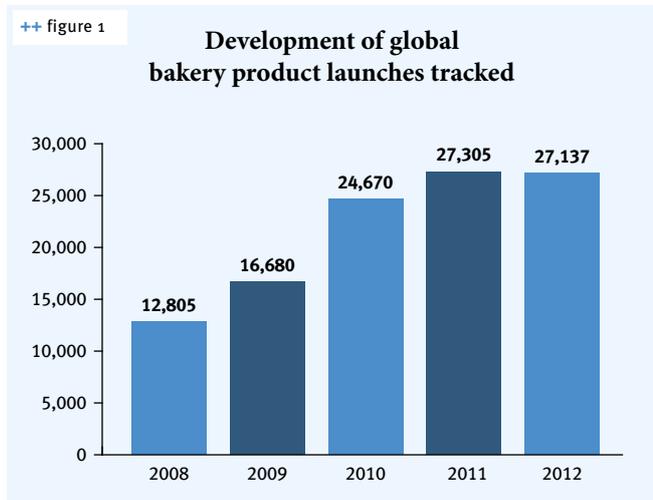


Product innovations stay healthy

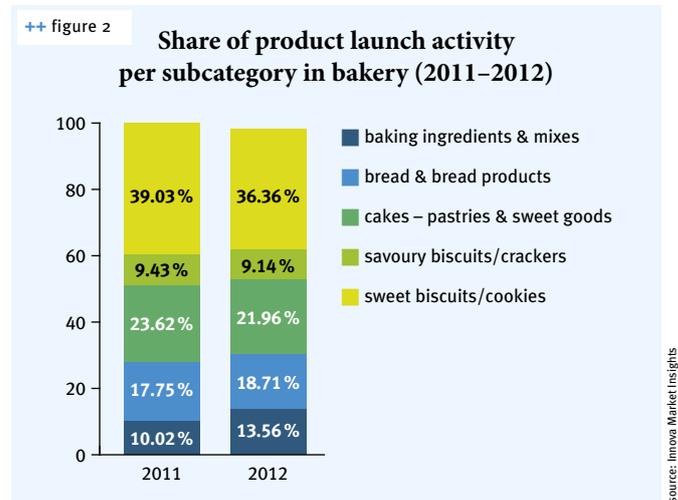
PRODUCTS THAT ENHANCE HEALTH AND WELLBEING ARE STILL THE BIG TREND IN NEW LAUNCHES IN THE BAKING INDUSTRY WORLDWIDE



Product innovations are the mainspring of growth. 27,137 innovations came onto the market in the bakery area throughout the world in 2012. This figure was determined by the Dutch market research institute Innova Market Insights in Duiven. It is a slight downturn by -0.62 % compared to the previous year, and is the first downturn after a whole series of years with large growth figures. The number of innovations launched in 2008 was still 12,805 products. The increase in 2009 was 30.26 %, and in 2010 it was as much as 47.9 % to a figure of 24,670 product launches. In 2011 the growth to 27,305 again turned out slightly more modest (10.68 %), but still remained in double digits (see figure 1).

The distributions within the bakery sector have also remained relatively constant from 2011 to 2012 (see figure 2). The segments it includes are Sweet Biscuits/Cookies, Savory Biscuits/Crackers, Cakes – Pastries & Sweet Goods, Bread & Bread Products and Baking Ingredients & Mixes. The biggest proportion of the total is accounted for by the Sweet Biscuits/Cookies segment at 36.36 %, followed by Cakes (21.96 %) and Bread (18.71 %).

Most of the innovations in 2012 came from Western Europe (8,543 new launches), closely followed by Asia (7,810 new launches). The situation was still the other way round in the previous year. At that time the Asians were able to bring the most new baked products onto the market (8,412). However the figure for the Western Europeans was only 275 products fewer. North America came far behind with only 3,612 launches in 2012. However, this means that continent still occupied third place in the rankings, but recorded a decrease in product innovations compared to the previous year. Latin America, Eastern Europe and the Middle East also recorded growth from 2011 to 2012 in addition to Western Europe (see figure 3). Many market research institutes identify similar trends that are



driving forward product range diversity in the baking industry. In this respect a healthy diet is still the main topic. According to information from Innova Market Insights, the majority of the health-related product innovations that came onto the market worldwide in the past few years are attributable to the “free from additives” segment (31 %), followed by products for people with food allergies (19 %) and products advertising aspects such as organic (17 %), “natural” (16 %) and low-fat (16 %).

The market research institute Datamonitor Consumer in London, UK, has discovered that the majority of consumers worldwide are interested in products offering health benefits. Nevertheless they do not buy exclusively these products. For example 86 % of consumers said they were interested in foods with a beneficial effect on bones and joints. But only 35 % actually buy such products. According to information from the British market researchers, the biggest interest among consumers is in products that generally increase health and wellbeing (92 %), followed by products to enhance the immune system (88 %), the heart (87 %) and the digestion (87 %). Consumers most often actively buy products that generally increase health and wellbeing (45 %). These are followed by products that enhance the immune system (40 %) and the digestive system (39 %). They reach less actively for products that control the appetite (28 %), help with relaxation (29 %) and increase attentiveness (30 %) (see figure 4).

The growing interest on the part of customers in baked goods manufactured from ancient cereal types, e.g. einkorn, emmer and teff, harmonizes with this trend towards quite generally increasing health and wellbeing. Many of these cereal types were popular in the past, but have been forgotten almost completely due to the emergence of modern hybrid varieties. Nutritional scientists have discovered that old varieties of cereals contain more nutrients. Because they have not been



... fit for future!

bred to such an extreme degree, their original nutrient profile has been preserved. An analysis by Datamonitor Consumer says "Ancient grains offer routes to product differentiation and premiumization."

Chia (salvia) seed is also very rich in nutrients, and is currently attracting increasing attention. It is a plant species in the labiate family that originally occurred mainly in Mexico and was already being eaten by the Mayas and Aztecs in 3,500 BC. It contains a very large proportion of omega-3-fatty acids, proteins, vitamins, antioxidants, minerals and dietary fiber. Nowadays chia is cultivated commercially, e.g. by the Australian company The Chia Co. in Port Melbourne. Datamonitor Consumer thinks chia is an ideal ingredient to increase the nutrient quality of baked goods. ABF Grain Products Ltd, London, is already marketing sunflower chia seed bread under its Burgen brand, and advertises using the statement that two slices already cover 40 % of the daily requirement of omega-3-fatty acids (see figure 6).

Datamonitor Consumer also identifies the coffee fruit as an attractive health-related trend ingredient for the baking industry. Because the coffee industry carries out further processing only on the beans, the fruit was until now purely a waste product. At the same time, however, it is packed full of important antioxidants. The reason why it is not processed further is that it is very easily perishable. The US-American company VDF FutureCeuticals, Inc. in Illinois has now succeeded in bringing coffee fruit onto the market in powder form and as a concentrate under the CoffeeBerry® brand. According to the manufacturer, the product has a pleasantly mild flavor and is compatible with almost all the other flavors. The products can be used by the entire food and beverage industries. The advantage when using coffee fruit consists not only of a health benefit. The theme of sustainability can also be used when advertising it. Datamonitor Consumer enthuses that "the coffee fruit is possibly one of the most sustainably produced superfoods worldwide."

Innova Market Insight has also uncovered another exciting seed: canary seed. This plant was originally native to the Canary Islands. Today it is cultivated on a large scale in the Canadian province of Saskatchewan. Canary grass is normally used as bird seed. The Crop Development Centre (CDC) of the University of Saskatchewan has now created a cultivar that also makes the seed suitable for use as a food. Tiny hairs had made canary seed inedible for humans until now. These hairs are absent in the new cultivar. Canary seed is not only gluten-free, its protein content of 16.6 % is higher than that of the other cereal varieties. The seed is suitable for conversion into flour for baked goods.

As in the past, all the market research institutes describe gluten-free baked goods as a great trend that continues to have good development potential. Questionnaire surveys show that worldwide sales figures are still rising, and consumers are still very interested in gluten-free baked goods. The ►

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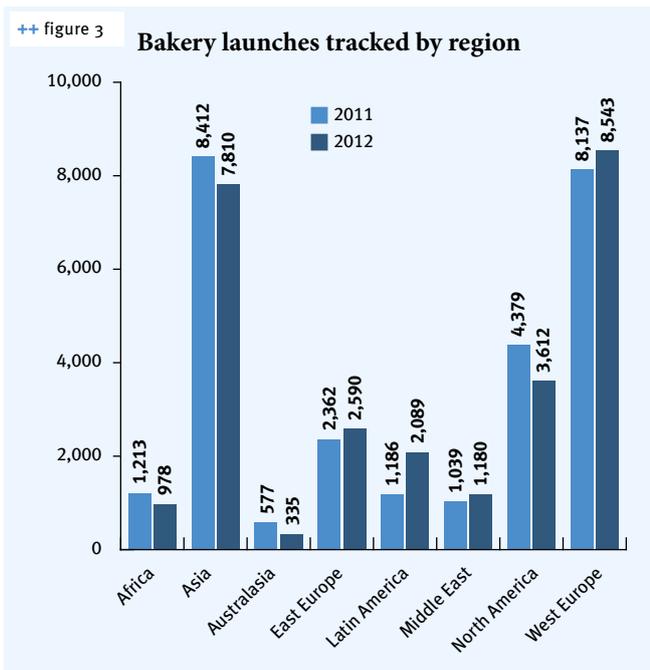
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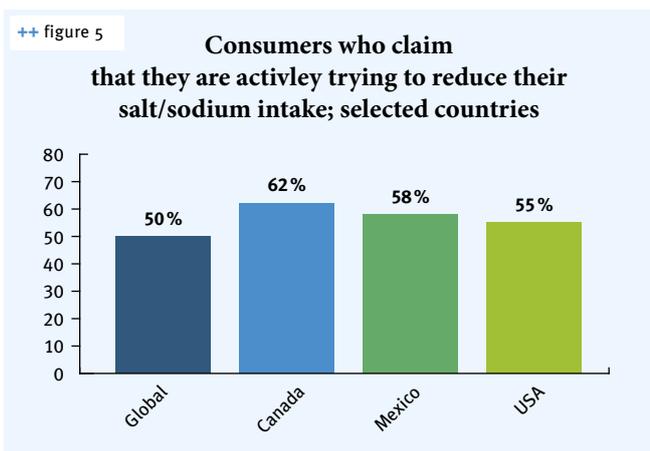
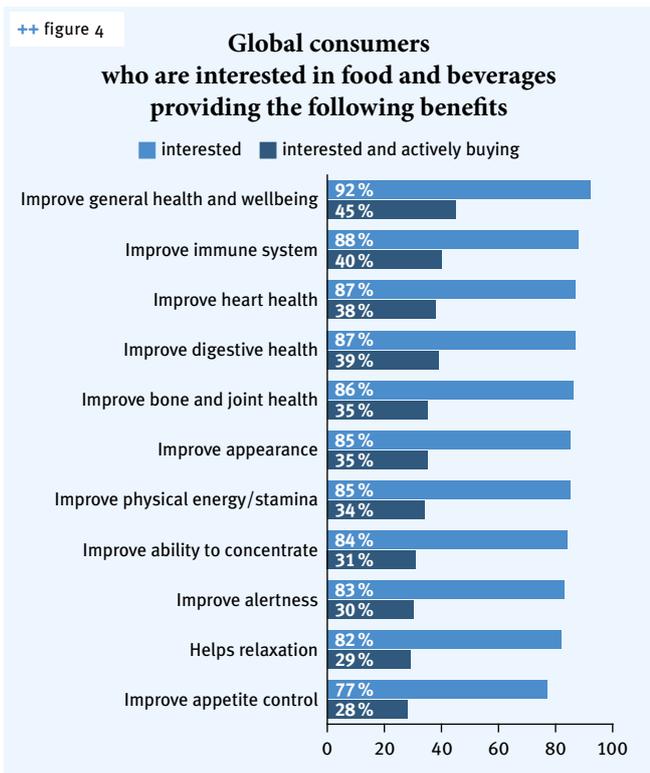
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days when coeliac sufferers were the only people interested in a gluten-free diet are long gone. For example according to Innova Market Insights, 30 % of American stated in a questionnaire survey that they were trying to reduce the gluten content in their diet or to abstain altogether from foods containing gluten. When asked why they buy gluten-free products, 35 % of consumers answered that gluten-free products are generally more healthy, 25 % said they wanted to use them to control their weight, 21 % stated that these products generally contained less carbohydrate, and 15 % explained that a family member had gluten or wheat intolerance. Only 7 % said that a family member suffered from coeliac disease.

At the same time, the manufacture of gluten-free products of the same quality as regular baked goods remains a big challenge for the baking industry. Baking with gluten-free ingredients still always has an adverse effect on product flavor and freshness. Many companies are investing much time and expense in the development of high-quality baked goods. The Canadian manufacturer of baking ingredients and flavorings, Embassy Flavours Ltd. in Brampton, Ontario, is also doing this. It has worked intensively on its gluten-free product line for three years. Martino Brambilla, CEO and founder of Embassy Flavours, says “We’re focused on making products that are as healthy as a regular item and taste good.” For example his products are used by the Canadian company Fancy Pokket Corporation in Moncton, New Brunswick, for its gluten-free product line. Fancy Pokket is currently investing USD 13m (approx. EUR 9.7m) to build the biggest gluten-free bakery in the USA (Lancaster County, South Carolina). Thus competition will continue to grow in the US-American market, where the start-up business Smart Baking Company in Winter Haven, Florida, has just filed a patent application for a zero carbohydrate, gluten-free bread under the name SmartLoaf. It is free from gluten, soya and lactose and is rich in protein, dietary fiber and antioxidants. The company is now seeking partners to produce this bread. According to information from Innova Market Insight, interest is already being expressed by people in the USA and Australia. In addition to bread, there is also a plan to introduce other zero-carb gluten-free products such as crackers and cereals at a later date.



Another innovation comes from Switzerland. The Jowa AG in Volketswil produces gluten-free breads, bread rolls and cakes under the Huttwiler Glutenfree brand, which are marketed frozen in an oven-proof bag (see figure 8). The customer can bake off the products conveniently in this bag without having to worry that his product may be contaminated by baked goods containing gluten. This guarantees simple, safe handling.

The US-American company Food for Life in Corona, California, has developed a new gluten-free product. It now offers gluten-free Black Rice Tortillas (see figure 7). Dunkin’ Donuts also plans to include gluten-free products in its range in the future. The company has announced that it intends to offer gluten-free cinnamon and sugar donuts and blueberry muffins in various stores in the USA.

++ figure 6



++ figure 6
Burgen sunflower chia seed bread by ABF Grain Products

A new technology could soon be attractive for the manufacturers of gluten-free donuts. Scientists in North Carolina State University have developed an infrared radiation with which the fat in gluten-free donuts can be reduced without impairing the flavor. Experts think this technology could replace the traditional frying in hot fat.

In addition to gluten-free baked goods, the reduction of certain constituents also remains an important topic for health-related baked goods. For example according to Datamonitor Consumer, 53% of those questioned worldwide said they were very strongly influenced by the package information “less or reduced sugar”. In addition to Stevia, the focus is now turning to monk-fruit (Luo Han Guo) from China. It is calorie-free and 150–200 times sweeter than sugar. It also contains a high proportion of antioxidants. It is being marketed by the Guilin Natural Ingredients Corp. in Guangxi, China, or their Partner in the USA, Layn USA, Inc. Another alternative sweetener is the juice of the coconut palm, which American Key Food Products LLC in Closter, New Jersey, has added to its product range. Coconut sugar is a low glycemic all-natural organic sweetener and sugar

++ figure 7



++ figure 7
Gluten-free Black Rice Tortillas by Food for Life

substitute that is suitable for use in baked goods that are to be advertised as low sugar/low glycemic.

The salt content of products is also important to consumers. According to Datamonitor Consumer, 50% of consumers worldwide are actively attempting to reduce the amount of salt in their diet. Canada is in the lead in this respect with 62% of all those questioned, Mexico with 58% and the USA with 55% (see figure 5). Tate & Lyle PLC in London, Great Britain, a worldwide supplier of ingredients for the food industry, has patented a new product that promises a salt reduction of 20–50%. SODA-LO® is manufactured from real salt. The patented technology is used to transform the salt crystals into free-flowing crystalline microspheres. These smaller, lower-density crystals efficiently deliver salty taste by maximizing surface area relative to volume.

Fat reduction is still playing a big role among customers. The family-run business Exquisite Handmade Cakes in Leeds, Great Britain, has developed a range of fat-reduced cakes each containing 40% less fat and 50% less saturated fatty acids. They are available in the flavors Chocolate Cake, Victoria ▶

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++ figure 8



++ figure 8
Huttwiler gluten-free breads, bread rolls and cakes by Jowa

Sponge and Lemon Drizzle. Otis Spunkmeyer in San Leandro, California, the US-American manufacturer of frozen doughs and ready-to-eat and frozen cookies and other sweet baked goods, which is owned by the Swiss Arysza Group, has launched a reduced fat chocolate chip cookie dough which it has adjusted to the nutritional guidelines for schools. These cookies have less than 30 % calories from fat, less than 10 % calories from saturated fatty acids and less than 30 % sugar. Like all other Otis Spunkmeyer products, these cookies contain no trans fatty acids, no preserving agents and no partially hydrogenated oils.

The product newly introduced by Perheleipurit Karppinen in Finland should ensure a good figure. The bread contains up to 70 % less carbohydrates than conventional breads. The package headlines the fact that a slice contains only 3 g of carbohydrates. The recipe also omits part of the flour and replaces it with eggs. This means the product also has a higher protein content.

A beauty cookie that is said to retard skin ageing and to inhibit the production of the skin pigment melanin has now come onto the market in Japan. The company Cowkey's in Sapporo, Hokkaido, says its Milcube Cookies contain oriental herb extracts that produce this effect. They are said to ensure a

++ figure 9



++ figure 9
Milcube Cookies by Cowkey's

whitening effect from inside within 60 days. These cookies are available in Lemon Cheese & Milk, Strawberry & Milk and Blueberry & Milk flavors (see figure 9).

It has never been simpler for consumers to obtain information about the effects of foods or ingredients on their health. According to Datamonitor Consumer, 59 % of consumers worldwide say they have substantially increased the time they spend obtaining information about health topics. At the same time, research into foods, their constituents and their effects on health has never been easier. A publication by Datamonitor Consumer says "There are over 1bn smartphone users globally with access to over 13,600 health-related apps in Apple's iTunes store alone, across areas such as diet, fitness, allergies, and skincare."

However, the flood of information is not always helpful. For example according to the London market research institute, 35 % of those questioned in a survey in Europe said it is confusing to decide which foods and beverages are healthy. Datamonitor Consumer draws from this the recommendation: "Engage with consumers in cyberspace and retail space, but keep it simple to avoid over-complicating the purchasing decision." +++

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