

On the tail of the tiger

With tiger breads now a mature category in-store, plenty more innovation is on the cards, but price remains a key factor.

Anne Bruce reports

Chef Heston Blumenthal is to launch some new bakery lines with Waitrose in April. The supermarket won't say if that range will include any bake-off breads. But if it does, Waitrose may well be on the right lines in consulting the man who brought the world snail porridge.

That's because suppliers on the retail and foodservice sides of the industry are all agreed that there is money to be made from speciality exotic, added-value or healthy bake-off breads. And while snail bread might be a step too far, there are plenty of new ideas coming through in the currently rather jaded bake-off category.

Current statistics indicate that, at the moment, the now somewhat old-hat tiger bread is the biggest-selling in-store bread by a long way. It is a white bread with a cracked 'tiger effect' paste top, launched by Asda in 2006. Data from Kantar Worldpanel of the top 10 best-selling in-store bakery loaves on value sales in the 52 weeks to 23 July 2011 (see table, pg 32) includes three tiger loaves as well as standard whites, a multi-seeded, a Granary and the Sainsbury's Harvest Grain loaf.

Tesco tiger at the top

The figures show Tesco's 800g tiger loaf was the number one selling in-store bakery line overall in the UK by value and also by volume. A Morrisons tiger loaf is in fourth place on value and on volume. But there are indications that the tiger line is becoming commoditised, with Asda volume sales of its tiger bread in a higher position in the top 10 table than its value sales.

Waitrose bakery buyer James Dickson identifies a trend towards more upmarket breads, with premium lines seeing good growth at the moment. Dickson says the top three bake-off sellers

at Waitrose are Stonebaked Boule, Pain au Levain and Grand Mange Blanc. Bread accounts for around 75% of Waitrose's bake-off sales, he says. However, price remains key. Dickson comments: "Bread pricing is very important to our customers, and this is especially true where product life is short. Customers must feel they are getting good value for money if they are to buy into a day-only range."

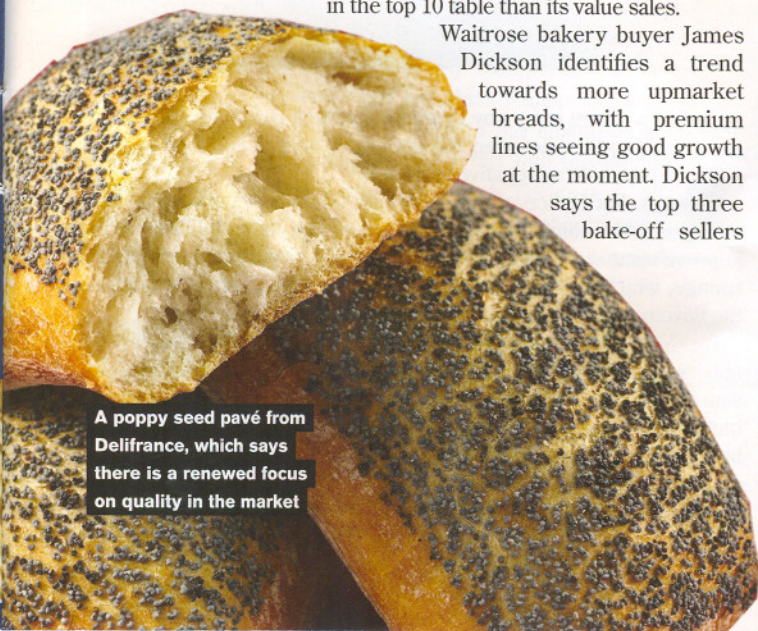
Supplier Délifrance's UK commercial director Alan Moutter says there is a renewed focus on quality from suppliers. This is seen as a way of moving on from what he refers to as the value focus and margin damage of the past few years. Products that are in growth tend to be unique to in-store bakery, with a level of complexity that cannot be produced within a standard in-store bakery from scratch, he says. These also need to be well differentiated and unavailable in the plant bread section, which is where tiger bread and flavoured loaves fit in, he suggests.

In-store bakery rolls are also seeing positive value and unit growth, fuelled by factors such as price promotion and convenience, and also as shoppers switch from other in-store bakery lines, he adds. But 'English' loaves such as standard scratch-produced commodity tinned loaves and bloomers are in decline. "In our experience, consumers are not motivated to buy cheap, undifferentiated breads."

Moutter reports that Delifrance's most popular ranges are its

"Bread pricing is very important to our customers and this is especially true where product life is short. Customers must feel they are getting good value for money if they are to buy into a day-only range"

Tiger rolls and breads have been the most popular lines in-store



A poppy seed pavé from Delifrance, which says there is a renewed focus on quality in the market

Delice de France panini: the firm says consumers are moving to ethnic and cultural breads



Snapshot on statistics

Kantar Worldpanel figures suggest that overall spend in in-store bakeries was down to £141,148m in the 52 weeks to 23 January 2011, from £157,164m the year before (11%). In the same period, volumes were down too, to 103,340m units from 111,418m units the year before (8%).

The average household visits the ISB fixture 31.5 times a year, compared with plant bread which is purchased 88 times a year.

baguettes, French loaves and added-value rolls, such as speciality ciabatta, flavoured and French rolls, including sandwich baguettes. "Macro trends will continue to influence in-store bakery purchase and consumption, with further development of provenance, development of innovative, indulgent breads, and increasingly healthier options," he predicts.

Meanwhile Ian Toal, MD of Delice de France, tells *British Baker* that one of the trends the company is exploring is Arctic bread, a versatile white flatbread. He comments: "We have recognised that consumers are increasingly moving towards ethnic and cultural breads, such as French, American sourdough, Mediterranean and even Arctic breads. Our range of savoury breads has been enhanced to enable customers to capitalise on this trend." It now includes lines such as cherry tomato and oregano focaccia and a soft Provençale herb demi-baguette.

Health trends

Demand for breads that fit well into a healthy consumer lifestyle is also on the up, Toal says. "We have invested considerable time in developing breads to meet this growing consumer demand in both foodservice and retail." The foodservice side of the business has launched a range of healthier breads, including a seeded demi-baguette, a multicereals Artisan Rustic Diamond and also the La Brea Bakery-branded Wheat and Honey Baguettine into supermarkets.

Delice also plans on repositioning many of its existing breads to highlight their healthy attributes – for example that they are whole-grain – as consumers look out for wholegrain options. It now has the official Whole Grain Stamp on its La Brea Bakery Whole Grain Loaf.

Toal reports that price on all products is an important issue in the foodservice industry at the moment. "The 'margin squeeze', dis-

"Macro trends will continue to influence in-store bakery purchase and consumption, with further development of provenance, indulgent breads and healthier options"

Top-selling in-store bakery breads

TOP 10 BY VALUE	TOP 10 BY VOLUME
Tesco Tiger Loaf 800g	Tesco Tiger Loaf 800g
Tesco Crusty White Split Tin 800g	Morrisons Fresh Large White Unsliced 800g
Tesco Short White Sandwich Bread Medium Sliced 800g	Tesco Short White Sandwich Bread Medium Sliced 800g
Morrisons Tiger Bread 800g	Morrisons Tiger Bread 800g
Morrisons Fresh Large White Unsliced 800g	Tesco Crusty White Split Tin 800g
Sainsbury's TTD 800g Multiseeded Loaf	Asda Tiger Bloomer 800g
Tesco Granary Malted Farmhouse 800g	Sainsbury's Harvest Grain Farmhouse Loaf 800g
Sainsbury's Harvest Grain Farmhouse Loaf 800g	Tesco Granary Malted Farmhouse 800g
Tesco Crusty White Sliced Tin 800g	Tesco Crusty White Sliced Tin 800g
Asda Tiger Bloomer 800g	Sainsbury's Sliced White Sandwich Loaf 800g

Source: Kantar Worldpanel (52 w/e 23 January 2011)



Bakehouse Italian flatbread, used in a toastie

cussed in a recent report by Peter Backman of Horizons, highlights that the difference between the operators, selling and food buying prices is now in firm negative territory."

He says that Delice offers competitive prices to customers, but quality is never compromised. "In fact we have made the decision to improve some our core French bread lines to now contain fermented sponge, which is then added to the dough. This process enhances the flavour and crumb texture of the products."

Richard Woolley, of wholesaler 3663, says the company has identified pre-grilled pre-sliced paninis as a gap in the market. And sourdough lines are also an area under development. But standard burger buns and petits pains are currently its best-selling bake-off bread lines. Price is very important to customers in the current climate, he emphasises.

Meanwhile, bake-off supplier Bakehouse is also focused on