

Packaged Bread - US - July 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"While packaged bread remains a huge category with universal penetration, dollar sales have increased minimally in recent years, and actual consumption has declined due to concern over calories and carbohydrates. Opportunities exist to improve bread's health profile, to expand its use across more occasions, and to highlight all the great tastes and textures that the category has to offer."

-John Owen, Senior Food & Drink Analyst

This report looks at the following areas:

- Growth expected to continue at slow pace
- More consumers report purchasing less bread
- Regular loaf bread by far the most widely and frequently eaten

This Report builds on the analysis presented in Mintel's Bread and Bread Products – US, September 2014, Bread – US, September 2013, as well as the November 2011, June 2009, June 2008, September 2007, January 2006, and February 2005 Reports of the same title.

Included in the scope of this Report are the following:

- Fresh loaf bread
- Rolls/buns/croissants (hamburger and hot dog buns, all other fresh rolls/buns/croissants)
- Bagels/bialys/English muffins/pita bread
- Tortillas (hard/soft tortillas/taco kits, refrigerated tortillas, frozen tortillas)
- Refrigerated/frozen bread products (frozen fresh-baked bread/roll/biscuit, frozen bagels, refrigerated bagels/bialys, refrigerated English muffins, refrigerated bread, refrigerated dinner/sandwich rolls/croissants)
- In-store bakery bread products.

Excluded from the scope of this Report are the following:

- Sweet baked goods such as muffins, scones, sticky buns, and sweet rolls as well as home baking products such as flour, yeast, bread mixes, pizza dough mixes, refrigerated/frozen pizza dough, and cake mixes. Tortilla chips and tostada chips also are excluded.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Packaged Bread - US - July 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

Growth expected to continue at slow pace

Figure 1: Total US sales and fan chart forecast of packaged bread, at current prices, 2011-21

More consumers report purchasing less bread

Figure 2: Purchase behaviors, change in bread consumption, May 2016

Regular loaf bread by far the most widely and frequently eaten

Figure 3: Frequency of eating different types of bread, May 2016

The opportunities

Align bread with Millennials' more purposeful snacking

Figure 4: Use occasions, by age, May 2016

Cater to the different health needs of different age groups

Figure 5: Purchase considerations, by age, May 2016

Refocus on the enjoyment of bread

Figure 6: Attitudes toward bread, by changes in bread purchase, May 2016

What it means

The Market – What You Need to Know

Only slow growth for large, mature category

Sales growth stagnates for fresh loaf bread as consumption declines

Among other types, tortillas lead growth

Market Size and Forecast

Growth expected to continue at slow pace

Figure 7: Total US sales and fan chart forecast of packaged bread, at current prices, 2011-21

Figure 8: Total US sales and forecast of packaged bread, at current prices, 2011-21

Market Breakdown

Sales growth stagnates for fresh loaf bread as consumption declines

Figure 9: Sales of packaged bread, by segment, 2016 (est)

Among other types, tortillas lead growth

Figure 10: Total US sales of packaged bread, by segment, at current prices, 2011-16

Market Factors

Core user groups growing

Figure 11: Households, by presence of own children, 2003-13

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Packaged Bread - US - July 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 12: Population by race and Hispanic origin, 2011-21

Obesity on the rise

Figure 13: Percentage of people aged 20 or older who are healthy weight, overweight, or obese, 2003-06 to 2011-14

Key Players – What You Need to Know

- Top two competitors market extensive brand portfolios
- Smaller competitors more focused on individual brands or segments
- Gluten-free trend continues to drive growth for targeted brands
- Organic brands gain traction, and attention from major competitor
- Free-from and clean-label claims grow more prominent
- New launches incorporate ancient grains

Company Sales of Packaged Bread

- Top two competitors market extensive brand portfolios
- Smaller competitors more focused on individual brands or segments
- Company sales of packaged bread
- Figure 14: MULO sales of packaged bread, by leading companies, rolling 52 weeks 2015 and 2016

What's Working?

- Gluten-free trend continues to drive growth for targeted brands
- Organic brands gain traction and attention from major competitor
- Cobblestone focuses on creative cooking and sandwich making
- King's Hawaiian rolls out on taste and indulgence
- Wonder Bread rises again

What's Struggling?

- Frozen
- Private label
- Figure 15: Bread product launches by branded vs private label, 2011-16*

What's Next?

- Free-from and clean-label claims grow more prominent
- Figure 16: Bread product launches by top claims, 2011-16*
- New launches incorporate ancient grains
- Packaging extends shelf life

The Consumer – What You Need to Know

- Regular loaf bread by far the most widely and frequently eaten
- Whole grain an increasingly common health priority
- Sandwich the most common way to eat bread, other uses slip
- More consumers report purchasing less bread
- Refocus on the enjoyment of bread

Bread Consumption Frequency

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Packaged Bread - US - July 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Regular loaf bread by far the most widely and frequently eaten

Figure 17: Frequency of eating different types of bread, May 2016

Greater variety of bread types in larger households

Figure 18: Frequency of eating different types of bread, any weekly eaten, by household size, May 2016

Hispanic bread eaters enjoy variety

Figure 19: Frequency of eating different types of bread, any weekly eaten, by household size, May 2016

Young adults more likely to eat a variety of specialty breads

Figure 20: Consumption of nontraditional/ethnic breads, May 2016

Bread Purchase Considerations

Whole grain an increasingly common health priority

Clean labels increasingly important

Figure 21: Purchase considerations, May 2016

Different health needs for different age groups

Figure 22: Purchase considerations, by age, May 2016

Use Occasions

Sandwich the most common way to eat bread, other uses slip

Figure 23: Use occasions, May 2016

Opportunity to align bread with Millennials' more purposeful snacking

Figure 24: Use occasions, by age, May 2016

New use ideas could boost consumption among bread lovers

Figure 25: Use occasions, purchase behavior groups, May 2016

Purchase Behaviors

More consumers report purchasing less bread

Figure 26: Purchase behaviors, change in bread consumption, May 2016

Young adults more likely to report purchasing more bread

Figure 27: purchase behaviors, by age, May 2016

Attitudes toward Bread

Health – Whole grain and weight

Convert enjoyment of new bread to purchase

Keep it fresh

Figure 28: Attitudes toward bread, May 2016

Refocus on the enjoyment of bread

Figure 29: Attitudes toward bread, by changes in bread purchase, May 2016

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Packaged Bread - US - July 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Abbreviations and terms

Abbreviations

Terms

Appendix – Market

Figure 30: Total US sales and forecast of bread products, at inflation-adjusted prices, 2011-21

Figure 31: Total US retail sales of packaged bread, by segment, at current prices, 2014 and 2016

Figure 32: Total US retail sales and forecast of fresh loaf bread, at current prices, 2011-21

Figure 33: Total US retail sales and forecast of rolls/buns/croissants, at current prices, 2011-21

Figure 34: Total US retail sales and forecast of bagels/bialys/English muffins/pita bread, at current prices, 2011-21

Figure 35: Total US retail sales and forecast of tortillas, at current prices, 2011-21

Figure 36: Total US retail sales and forecast of frozen/refrigerated bread products, at current prices, 2011-21

Figure 37: Total US retail sales and forecast of in-store bakery bread products, at current prices, 2011-21

Figure 38: MULO dollar sales of packaged bread, by segment and subsegment, at current prices, 2011-16

Figure 39: MULO volume sales of packaged bread, by segment and subsegment, in pounds, 2011-16

Figure 40: Total US retail sales of packaged bread, by channel, at current prices, 2014 and 2016

Appendix – Key Players

Figure 41: MULO sales of fresh loaf bread by leading companies and brands, rolling 52 weeks 2015 and 2016

Figure 42: MULO sales of rolls/buns/croissants, by leading companies and brands, rolling 52 weeks 2015 and 2016

Figure 43: MULO sales of bagels/bialys/english muffins/pita bread by leading companies and brands, rolling 52 weeks 2015 and 2016

Figure 44: MULO sales of tortillas, by leading companies and brands, rolling 52 weeks 2015 and 2016

Figure 45: MULO sales of refrigerated/frozen bread products, by leading companies and brands, rolling 52 weeks 2015 and 2016

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com