MULTICLIENT STUDY

Bakery Intermediates for Bread and Morning Goods

Supply/Demand & Competitive Strengths

EU28, USA, Canada

2016-2021

Published September 2017

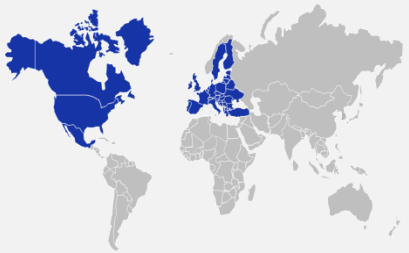
Sectors



Bread
Morning Goods



Markets



EU28
USA
Canada

GIRACT
Geneva, Switzerland

Transnational Business Research & Consultancy

Introduction



While, in both bread and baked goods, the consumer continues to demand no 'apparent' change in the end-products due to their traditional nature, ingredient producers have been trying to offer products obtained through soft technologies. Pressure to simplify processes have offered new opportunities to ingredient suppliers, and yet enabled bakers to control costs. In particular, some ingredient groups have evolved significantly, with an increasing involvement in the end products by offering mixes/concentrates to the industry.

Panera, with its no-no additive list, has kept ingredient producers on their toes, even as traditional ingredients such as pre-ferments ('levain' in French) are sought by bakers as a possible yeast replacer.

Introduction

Following its earlier successful studies on bakery mix/improver markets in 2002, 2006/7 and 2012/13, Giract, the international ingredients and technologies specialist, will now identify the market size, shape and opportunities for ingredient mixes for bakery (in bread and morning goods) with an in-depth understanding from interviews with key producers and a wide range of user companies in EU28 (top 8 countries), and, USA/Canada. Clients of our earlier studies include ABF, Aromatic, Cargill, CSM, DSM, Finncereal, Kerry, Lallemand, Lesaffre, Limagrain, Novozymes, Zeelandia, etc.

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Objectives of this study

Bakery Intermediates for Bread and Morning Goods



- A review of current and potential products, their specifications, applications
- An analysis of the producers, their market shares, and exports
- An appreciation of "why" and "why not" concerning the key products based on interviews with producers and retailers/food service users across EU28, and USA/Canada
- An evaluation of the impact on the industry by such new and on-going factors such as vegan/vegetarian, GMO, no-additive/clean label, natural, sustainable, etc.
- An identification of the current (2016) market size by product group, sector, country, and forecasts of demand volumes and values for 2021 in artisanal and industrial bakery

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This unique study examines bakery intermediates market sizing supply,/demand & trends across EU28, USA, Canada.

SCOPE

Products



- **Improvers:** Flour correctors/improvers with emulsifiers, enzymes, preservatives, etc.
- **Concentrates:** mixes without, or up to 20%, addition of flour
- **Pre-mixes:** Ready-to-use mixes with part (usually 40-60%) flour addition
- **Mixes:** Ready-to-use flour-based mixes
- **Starter/Levain:** traditional/natural pre-ferment/starter as a yeast replacement ingredient

Markets



- **EU28**
- **USA**
- **Canada**

STUDY HIGHLIGHT

Programme

Following an initial review of Giract's extensive in-house data, the dominant element of the study is the interviews with key actors - producers, end-users, industry experts and authorities - in order to derive real understanding of the latest changes in market forces

Current: 2016
Forecast: 2021

Timescale



WHAT DO YOU GET?

1. **Electronic Copy** of report in searchable PDF format
2. **One Printed Copy**



3. Report published in **September 2017**

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Bakery Intermediates
Supply/Demand &
Competitive strengths

EU28, USA/Canada

2016 - 2021

DRAFT STUDY DOCUMENT

September 2017

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Sample Report Pages

1. INTRODUCTION

1.1. INTRODUCTION

Baked goods are a traditional staple in the EU and in N.America. Therefore the consumer is loath to accept any 'apparent' change in these products. This has been the situation since 2002, when Giract first started tracking these two markets for bakery intermediates, as a distinct study. In the last decade or so, there seems to have been a lot of pressure of ingredient and intermediate suppliers to innovate while not changing anything! **ingredient producers** have been trying to offer products obtained through soft technologies. Pressure to simplify processes have offered new opportunities to ingredient suppliers, and yet enabled bakers to control costs. In particular, some ingredient groups have evolved significantly, with an increasing involvement in the end products by offering mixes and concentrates to the industry. Panera, with its no-no additive list, has kept ingredient producers on their toes. Recently vegan, ancient grains, natural additives, GMO and enzymes, among others have taken the forefront among issues facing the intermediate producers.

Following its earlier successful studies on bakery mix/improver markets in 2002, 2006/7 and 2012/13, Giract, the international ingredients and technologies specialist, will now identify the market size, shape and opportunities for ingredient mixes for bakery with an in-depth understanding from interviews with key producers and a wide range of user companies in EU28 (top 8 countries), and, USA/Canada. Clients of our earlier studies include ABF, Aromatic, Cargill, CSM, DSM, Finncereal, Kerry, Lallemand, Lesaffre, Limagrain, Novozymes, NutriXo, Zeelandia, etc.

1.2. OBJECTIVES

- A review of current and potential products, their specifications, applications
- An analysis of the producers, their market shares, and exports
- An appreciation of "why" and "why not" concerning the key products based on interviews with producers and retailers/food service users across EU28, and, USA/Canada
- An evaluation of the impact on the industry by such new and on-going factors such as vegan/vegetarian, GMO, no-additive/clean label, natural, sustainable, etc.
- An identification of the current (2016) market size by product group, sector, country, and forecasts of demand volumes and values for 2021

1.3. SCOPE

1.3.1. PRODUCTS

Improvers: flour correctors/improvers with emulsifiers, fats, malt etc.

Concentrates: mixes without, or with up to 20% addition of flour

Pre-mixes: ready to use mixes with part (usually 40-60%) flour addition

Authorized food additives and conditions of use in fresh wheat bread, white and brown breads

E-number	Name	Maximum level (mg/l or mg/kg as appropriate)	Restrictions/exceptions
E 260			
E 261			
E 262			
E 263			
E 270			
E 300			
E 301			
E 302			
E 304			
E 322			
E 325			
E 326			
E 327			
E 471			

Data Edited

Sample Report Pages

Consumers gravitate towards healthy products without synthetic or GM ingredients, cleaner labels and prominent health and wellness positioning. These will drive food product innovation.

3.1.1.2 CANADA

The key economic indicators for the Canada along with Giract's forecasts are tabulated below:

Socio-economic market	Unit	2012	2015	2021	Past	Forecast
Total GDP	bio const EUR					
Real GDP in EUR per capita	const EUR/capita					
Population	mio					
Average household size	persons					
Number of households	mio					

Data Edited

Canada economy is the 10th nominal and 17th economy in the World with a GDP of USD 1.6 trillion in 2016. Service industry dominates the Canadian economy and employs over 33% of the total population.

Commercial fishing and seafood industry is well established in Canada and is 8th largest in the World. Food and beverage industry stands as the second largest sector within the manufacturing sector by value and contributes over 2% of the country's GDP. It is estimated at USD 103.4 bio in 2016 and exported 25% of total production worth of USD 26.7 bio. Majority of its processed food and beverage products are exported to 190 countries and the key importers are US (71%), China (7%), Japan (6%) and others are Mexico, Russia and South Korea. Canadian food processing industry employs over 2 46 000 personnel and supplies around 75% of the domestic food and beverage product demand.

Food Industry

The Canadian food and beverage manufacturing industry comprises of 6 500 companies and generates sales revenue over USD 105.6 bio per annum. Meat products processing is the major subsector within the food industry and is valued at USD 27.3 bio in 2014. Most (90%) of the companies have less than 100 employees and only few (<1%) employ more than 500 personnel.

Key companies in the Canadian food industry includes Kellogg's, Quaker, Nestle, PepsiCo, Molson, McCain, Maple Leaf, Saputo, Lassonde, etc.

Before two decades, trans fat consumption among Canadians was at higher levels that leads to higher risk of heart diseases. Health Canada, a government agency has taken efforts to popularize healthier eating by introducing a regulatory proposal to prohibit the use of partially hydrogenated oils (PHO) in all foods sold in Canada by April, 2017

3.7. SUPPLIER MARKET SHARES (USA & CANADA)

3.7.1. BREAD

3.7.1.1 IMPROVERS

BREAD - Artisanal

Supplier	Producer share% (bread)	Improver production – for bread (kt)
Puratos		
Corbion (Caravan)		
AB Mauri		
others		
Total		

Data Edited

Source: Giract, based on interviews and estimations

BREAD - Industrial

Supplier	Producer share% (bread)	Improver production – for bread (kt)
Corbion (Caravan)		
Puratos		
AB Mauri		
others		
Total		

Data Edited

Source: Giract, based on interviews and estimations

BREAD – In-store

Supplier	Producer share% (bread)	Improver production – for bread (kt)
Puratos		
Corbion (Caravan)		
Bread Partners		
others		
Total		

Data Edited

Source: Giract, based on interviews and estimations

Sample Report Pages

3.8.1.2 *NON-BREAD*

Demand for ingredients in non-bread, 2016 t

Sector	Method	2016	2021	CAGR (%)
Artisanal				
Industrial				
In-store				

Data Edited

Source: Giract, based on interviews and estimations

3.9. INTERMEDIATE PRICES AND MARKET VALUE

3.9.1. PRICE INDICATIONS

Prices of Ingredients, USA/Canada, 2016

Ingredient	Application	USD/Kg
Improver		
Concentrates		
Premixes		
Mixes		

Data Edited

Source: Giract, based on interviews

4. GERMANY

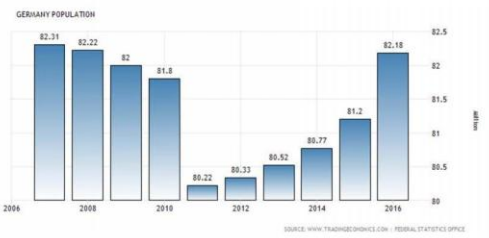
4.1. DEMOGRAPHICS

Population trend – Germany mio

	2008	2010	2012	2014	2016	CAGR% 2008–2016
Germany	82.22	81.8	80.33	80.77	82.18	-0.01

Source: tradeingeconomics.com

Germany is one of the largest countries in Europe, with its population of 82 mio and area of 357 000 km². The country ranks second after Russia, among European countries in terms of population it ranks first among the EU countries. Germany is a federal republic consisting of 16 states. The country is one of the key actors in the world economy and politics with its leadership position within the EU, strong economic, industrial, commercial and technological infrastructure.



4.1.1. SOCIO-ECONOMIC FACTORS

The most relevant economic indicators, together with Giract's forecasts are:

Total GDP	bio EUR
GDP per capita	EUR
Average household size	persons
Number of households	mio

Data Edited

Source: Trading Economics, Statista

5. FRANCE

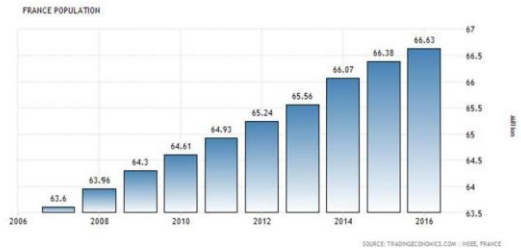
5.1. DEMOGRAPHICS

Population trend – France mio

	2008	2010	2012	2014	2016	CAGR% (2008–2016)
France	63.96	64.61	65.24	66.07	66.63	0.51

Source: tradeingeconomics.com

France has the largest area in Western Europe as well as in European Union. With an area of 552 000 km², it is the 22nd most populous country in the world with the population of 66.63 mio in 2016.



5.1.1. SOCIO-ECONOMIC FACTORS

The most relevant economic indicators, together with Giract's forecasts are:

Socio-economic marker	Unit	2010	2015	2020	CAGR% 2010–2015	CAGR% 2015–2020
Total GDP						
GDP per capita						
Average household size						
Number of households						

Data Edited

Source: Trading Economics, Statista

France has a real sweet tooth for biscuits and cakes with a total annual per capita consumption of 8.5kg. This remains in line with average EU consumption with 6.9 kg per capita annual consumption of biscuits and 1.5kg of cake. Drilling down further, speciality biscuits (cream-filled, chocolate etc.) are the most popular, accounting for 3.7kg annual per capita consumption, closely followed by plain biscuits and teatime treats (2.8kg) and sponge-based products (sponge fingers, madeleine etc), and waffle biscuits. While eating biscuits and cakes in France for teatime, has always been particularly prevalent among children, with 83% of children consuming biscuits and cakes at least once a week, the trend has also caught on with the next generation, with 39% of adults enjoying biscuits and cakes as an afternoon treat at least 4 times a week.

Bakery consumption trends and forecast, France

	2012 kt	2016 kt	2021 kt	CAGR% 2012-2016	CAGR% 2016-2021
Breads					
– Breads					
– Rolls					
Non-Breads					
– Biscuits					
– Cakes					
– Pastries & sweet pie					
– Breakfast cereals					
– Others (morning goods)					
Total					

Data Edited

Source: Giract, based on Canadean

Key players in the bakery sector are Mondelez International, Brioche Pasquier, Barilla S.P.A., and GroupeLimagrain. Bakery segment in France is forecast to grow at a CAGR of 1.16% per annum during 2016-2021.

5.2. MILLING AND BAKING

Wheat Trade Data, 2012-2016 kt

Year	Production	Imports	Exports	Availability
2014-15				
2013-14				
2012-13				

Data Edited

Source: Startegiegrain, Worldgrain

Sample Report Pages

Company	Products	Revenue (EUR mio)
Total		

Source: Canadean

Data Edited

5.3. FLOUR USE IN BAKING

Flour use split between industrial vs artisanal bakery segment, France, 2016

	Industrial (kt)	Artisanal (kt)	Total (kt)
Bread			
Non-bread			

Source: based on Giract's calculation

Data Edited

5.4. SUPPLIER MARKET SHARES

5.4.1. BREAD

5.4.1.1 *IMPROVERS – ARTISINAL*

Supplier improvers ARTISANAL	Market share in % of volume	Improver production (kt)
Millers		
Lesaffre		
Puratos		
Others		
Total		

Data Edited

5.4.1.2 *IMPROVERS – INDUSTRIAL*

Supplier improvers INDUSTRIAL	Market share in % of volume	Improver production (kt)
Eurogerm		
Puratos		
AB Mauri (Gb Plange)		
Others		
Total		

Data Edited

5.4.1.3 *IMPROVERS – INSTORE*

Supplier improvers IN-STORE	Market share in % of volume	Improver production (kt)
Millers		
Lesaffre		

Data Edited

6. UNITED KINGDOM

6.1. DEMOGRAPHICS

Population trend – United Kingdom mio

	2008	2010	2012	2014	2016	CAGR%
United Kingdom						

Source: tradeingeconomics.com

Data Edited

The United Kingdom of Great Britain and Northern Ireland is commonly known as the United Kingdom (UK) or Britain. The total population of the country in 2016 was 65.4 mio. It is the 3rd most populous country in the European Union. Majority of the UK's population is White British, where English is the predominant language.

Nearly 84% of the population resides in England, 8% in Scotland, 5% in Wales and 3% in Northern Ireland. The age structure of a population affects a nation's key socioeconomic issues. In UK, the middle-age population (ages 25–54 years) accounts nearly 41% of the total population.



6.1.1. SOCIO-ECONOMIC FACTORS

The most relevant economic indicators, together with Giract's forecasts are:

Socio-economic marker	Unit	2010	2015	2020	CAGR% 2010–2015	CAGR% 2015–2020
Total GDP						
GDP per capita						
Average household size						
Number of households						

Source: Trading Economics, Office for National Statistics

Data Edited

Sample Report Pages

6.5.1.2 *NON-BREAD*

Demand for ingredients in non-bread, 2016 kt

Sector	Method	2016	2021	CAGR (%)
Artisanal				
Industrial				
In-store				

Data Edited

Source: Giract, based on interviews

6.6. INTERMEDIATE PRICES AND MARKET VALUE

6.6.1. PRICE INDICATIONS

Prices of ingredients, breads, United Kingdom, 2016

	Artisanal	Industrial	In-store
	av. Value	av. Value	av. Value
BREAD	EUR/kg	EUR/kg	EUR/kg
Improvers			
Liquid improvers			
Concentrates			
Pre-mixes			
Mixes			

Data Edited

Source: Giract, based on interviews

7. ITALY

7.1. DEMOGRAPHICS

Population trend - Italy mio

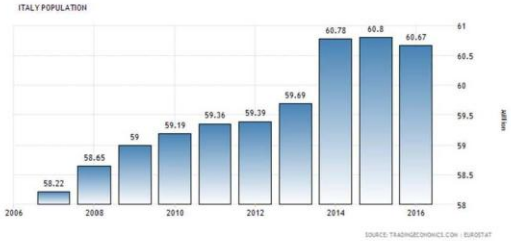
	2008	2010	2012	2014	2016	CAGR% (2008-2016)
Italy						

Data Edited

Source: tradingeconomics.com

Italy's population was 60.67 mio as of January 1, 2017. Its population density, at 201 inhabitants per square kilometre, is higher than that of most Western European countries. However the population is distributed in an uneven fashion. The most densely populated areas are the Po Valley (that accounts for almost half of the national population) and the metropolitan areas of Rome and Naples, while vast regions such as the Alps and Apennines highlands, the plateaus of Basilicata and the island of Sardinia are very sparsely populated.

Inhabitants between 15 and 64 years account for the bulk of the population. They make 64.3% of the population. 13.3 mio Italian residents are aged over 64 years. There are only 8.3 mio people below 14 years of age. The median age is 44.2 years. This clearly indicates that Italy consists of an ageing population.



7.1.1. SOCIO-ECONOMIC FACTORS

The most relevant economic indicators, together with Giract's forecasts are:

Sample Report Pages

Bread and rolls are the two major bakery segments which account for about 61% of total bakery products. Bakery sector in Italy is highly fragmented and artisanal producers hold almost 50% volume share. The competition between branded and private label products remained a major influence over sales of baked goods during the research period as high levels of price promotional activity continued to place limits on value growth in the category.

Italian consumers continue to be cost-conscious and look for value-for-money when purchasing bakery products. This trend is putting pressure on manufactures, in particular in the baked goods subsector, as they continue to deal with increasing production and raw material costs. Bakery products, particularly, baked goods such as bread, is considered a staple product in the Italian diet. However, as part of the cost-savings trend, more consumers are moving away from purchasing fresh baked bread and baking their own bread at-home which is causing a decrease in sales.

During the forecast period, demand for baked goods is expected to be driven mainly by the health and wellness trend, leading to an anticipated increase in the range of fresh, high-quality and specialised products in the category. Italians are increasingly looking for fresh and natural packaged food products produced in close proximity to their point of sale wherever possible, while demand is also rising for specific products which target particular consumers groups, such as people with gluten intolerance or lactose intolerance. The leading manufacturers of baked goods are thus expected to increasingly invest in such products during the forecast period in order to meet rising consumer demand.

Bakery consumption trends and forecast, Italy

	2012 kt	2016 kt	2021 kt	CAGR% 2012-2016	CAGR% 2016-2021
Breads					
– Breads					
– Rolls					
Non-Breads					
– Biscuits					
– Cakes					
– Pastries & sweet pie					
– Breakfast cereals					
– Others (morning goods)					
Total					

Data Edited

Source: Giract, based on Canadean

8. SPAIN

8.1. DEMOGRAPHICS

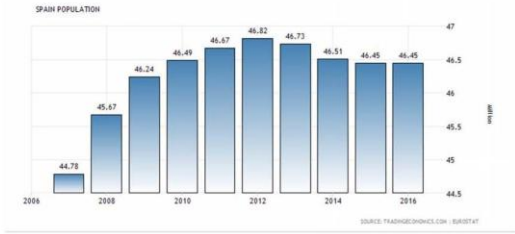
Population trend - Spain mio

	2008	2010	2012	2014	2016	CAGR%
Spain						

Data Edited

Source: tradeingeconomics.com

The current population of Spain is 46.5 mio which is equivalent to 0.61% of the total world population. Nearly 68% of the total population are between 15-64 years old. The median age in the country is 43.7 years. The country's yearly population growth rate is -0.06%. The total population is forecast to reach 46.2 mio by 2020. The decrease in population is due to decline in birth rates compared to death rates and increase in migration. Out of the total population, nearly 83% lives in urban.



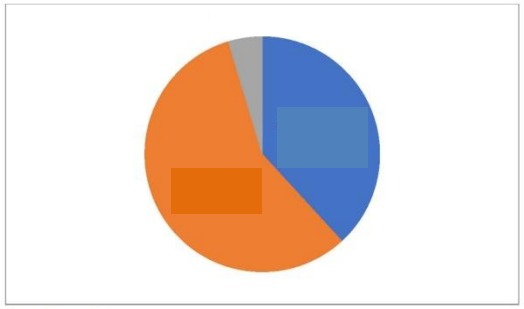
8.1.1. SOCIO-ECONOMIC FACTORS

The most relevant economic indicators, together with Giract's forecasts are:

Socio-economic marker	Unit	2012	2015	2020	CAGR% 2012-2015	CAGR% 2015-2020
Total GDP						
GDP per capita						
Average household size						
Number of households						

Data Edited

Sample Report Pages



Source: Startegiegrain

Out of total wheat available in the country, nearly 38% were used for human and industrial consumption (flour milling, baking etc.) with the rest going to animal feed sector.

8.2.1. MILLING

According to AFHSE (Asociación de Fabricantes de Harinas y Sémolas de España), the wheat processing industry comprises a total of 128 factories. Out of which 110 have a capacity of more than 2 000 tons a year. The sector is almost entirely integrated by small and medium-sized family businesses in the second, third and fourth generation. Total employment in milling is around 3000, or an average of 17 people per production site.

Spain – Wheat flour trade data (kt)

Year	Production	Consumption	Export
2010			
2011			
2012			
2013			
2014			
2015			

Source: AFHSE

Data Edited

Ingredient	Breads EUR mio	Non-breads EUR mio	Total value EUR mio
Improvers			
Concentrates			
Premixes			
Mixes			
Total			

Source: Giract, based on interviews

Data Edited

8.7. END-USERS

8.7.1. OVERVIEW

8.7.2. END-USER PERCEPTIONS

Summary of demand perspectives

Company	Sector	Relevant comments
Fripan (Europastry)	Bread, muffin, cake	– The company does not use any pre-mixes or mixes in its bakery products – Buying raw materials and preparing customized mixes in-house helps in saving money and also remains as a cost-effective option for the company
Ladonuteria	Doughnuts	– Does not use any intermediates – Dough preparation for doughnuts is a simple process with simple ingredients. With proper ageing, perfect dough can be produced in-house. The company does not believe in using unnatural or refined ingredients

8.7.2.1 *FRIPAN (EUROPASTRY)*

Pza. Xavier Cugat
2 Ed. C, 4th Floor
SantCugat Nord Parc.
08174 SantCugatdelVallès (Barcelona), Spain
Tel: +34 935 041700
Fax: +34 935 041717
www.fripan.com

Company background and products supplied

Fripan (Europastry) has over 15 production centres in five countries with 3020 employees. It has invested over EUR 171 mio from 2012-2016. Europastry remains as one of the key player in the European doughnut sector and frozen dough sector. The annual turnover of the company is around EUR 41 mio. It manufactures and sells over

Sample Report Pages

9. POLAND

9.1. DEMOGRAPHICS

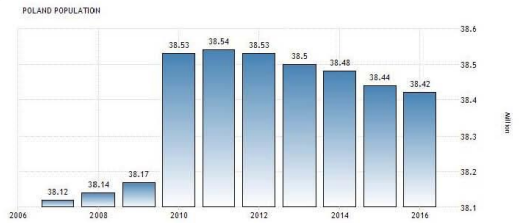
Population trend – Poland mio

	2008	2010	2012	2014	2016	CAGR%
Poland						

Source: tradingeconomics.com

Data Edited

Poland, officially the Republic of Poland is the sixth most populous member state of the European Union with a population of over 38.5 mio people. Population is almost stagnant with a growth rate of -0.08%. About 97% of the population is polish. The median age of the population is 38.2 years. Aging population, low birth rates and continued emigration is impacting the economy. Out of total population, nearly 61% lives in urban areas. Life expectancy for male is 73.7 years for male and 81.7 years for female.



9.1.1. SOCIO-ECONOMIC FACTORS

The most relevant economic indicators, together with Giract's forecasts are:

Socio-economic marker	Unit	2012	2015	2020	CAGR% 2012-2015	CAGR% 2015-2020
Total GDP						
GDP per capita						
Average household size						
Number of households						

Source: Trading Economics, Europa

Data Edited

9.2. MILLING AND BAKING

Wheat trade data, 2012-2016 kt

Year	Production	Imports	Exports	Availability
2016				
2015				
2014				
2013				
2012				
2011				

Source: FAS/Warsaw, Global Trade Atlas, Main Statistical Office, Poland

Data Edited

Poland is the 3rd largest grain producer in EU28. According to the International Grains Council's Grain Market report wheat production in 2015 was 11.1 mio tons, which is 5% lower than 2014. Growing demand for soft wheat from Saudi Arabia, Germany, and Egypt was the main driver for the fast export growth dynamics in the last years.



Data Edited

9.2.1. MILLING

Polish Millers Association (SMRP) is the representative organisation for the Poland flour milling industry. Members of SMRP represent approximately 70% of milling capacity in Poland. According to the European Flour Millers' Association, there are 435 flour mills in Poland with a capacity of 7 million tons. Most of those are small family owned mills. Out of the total flour milling companies, nearly 215 mills operate with a capacity of over 100 tons a day.

Sample Report Pages

10. NETHERLANDS

10.1. DEMOGRAPHICS

Population trend – Netherlands mio

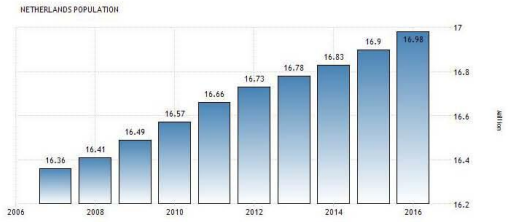
	2008	2010	2012	2014	2016	CAGR%
NETHERLANDS						

Data Edited

Source: tradingeconomics.com

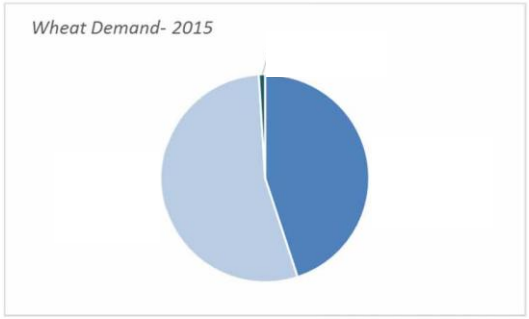
The Netherlands, also informally known as Holland is a densely populated country in Western Europe. The age structure of a population affects a nation's key socioeconomic issues. In Netherlands, the older population (ages 55 years and above) comprises nearly 32% of total population which leads to decrease in proportion of working population. The country's annual population growth rate is 0.43%.

Netherlands has seen a rise of migrants coming from countries in Western Europe, mostly from the bordering countries of Germany and Belgium.



10.1.1. SOCIO-ECONOMIC FACTORS

The most relevant economic indicators, together with Giract's forecasts are:



Source: Startegiegrain

Out of total wheat available in the country, nearly 2.4 mio tons were used for human and industrial consumption (flour milling, baking etc.) with the rest going to animal feed sector.

10.2.1. MILLING

Wheat flour production is concentrated among small number of millers which operates less than 10 mills. Key millers are Koopmans and Meneba accounting for 60-65% of country's milling capacity.

Netherlands – bread cereals milled

Year	Wheat (kt)	Rye (kt)	Total (kt)
2013/14			
2014/15			

Data Edited

Source: Startegiegrain, Worldgrain

Meneba is the leading milling company and producer of flour and bakery goods. It is the second largest producer in Europe and is based in Rotterdam. Koopmans Meel is the second largest milling company and is based in Leeuwarden, Northern Holland. The majority of the wheat used by millers is imported. Most production occurs in the Western regions of Holland.

11. BELGIUM

11.1. DEMOGRAPHICS

Population trend – Belgium mio

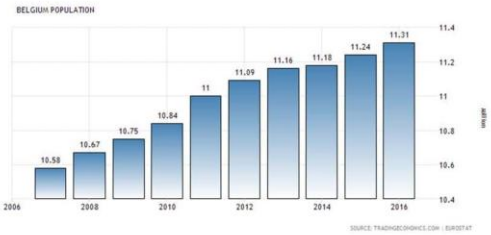
	2008	2010	2012	2014	2016	CAGR% 2008–2016
Belgium						

Source: tradingeconomics.com

Data Edited

Having a population of 11.3 mio, Belgium is one of the most densely populated countries in Europe right after the Netherlands. The population number is evenly distributed between the sexes, although women outnumber men by approximately 0.2 mio. The population density is 363 people per km². The Northern part of the country is much more densely populated than the South.

The working population, between 18 and 64 years numbers 6.9 mio and accounts for the bulk of the population. 2.1 mio Belgian residents are aged over 64. There are only 2.2 mio people below 18 years of age. This clearly indicates that Belgium consists of an ageing population.



11.1.1. SOCIO-ECONOMIC FACTORS

The most relevant economic indicators, together with Giract's forecasts are:

Sector	Method	2016	2021	CAGR (%)
Artisanal				
Industrial				

Data Edited

Source: Giract, based on interviews

11.6. INTERMEDIATE PRICES AND MARKET VALUE

11.6.1. PRICE INDICATIONS

Prices of ingredients, bread, Belgium, 2016

Bread	Artisanal av. value EUR/kg	Industrial av. value EUR/kg
Improvers		
Concentrates		
Pre-mixes		
Mixes		

Data Edited

Source: Giract, based on interviews

Prices of ingredients, non-bread, Belgium, 2016

Non-bread	Artisanal av. value EUR/kg	Industrial av. value EUR/kg
Improvers		
Contentrates		
Pre-Mixes		
Mixes		

Data Edited

Source: Giract, based on interviews

11.6.2. MARKET VALUE

Current market value of bakery ingredients in Belgium, 2016 EUR mio