



## MARKET TRENDS IN PHILIPPINES: BAKERY

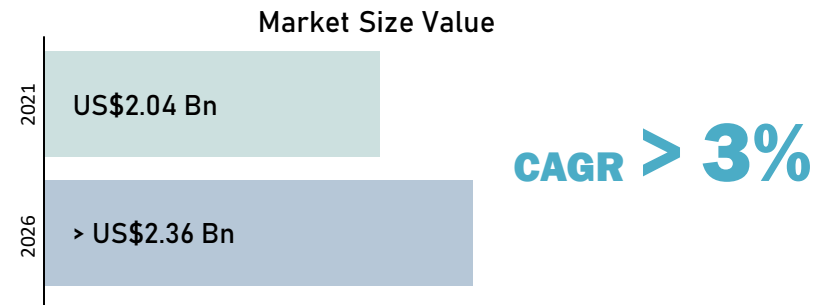


## MARKET OVERVIEW & KEY TRENDS

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## Philippines Bakery & Cereals Market

Forecast Analysis, 2021-2026



Bread & Rolls

Largest category by  
volume in 2021



Cookies  
(Sweet Biscuits)

Largest category in the  
market by value in 2021 &  
forecast to register the  
fastest volume growth



Energy Bars

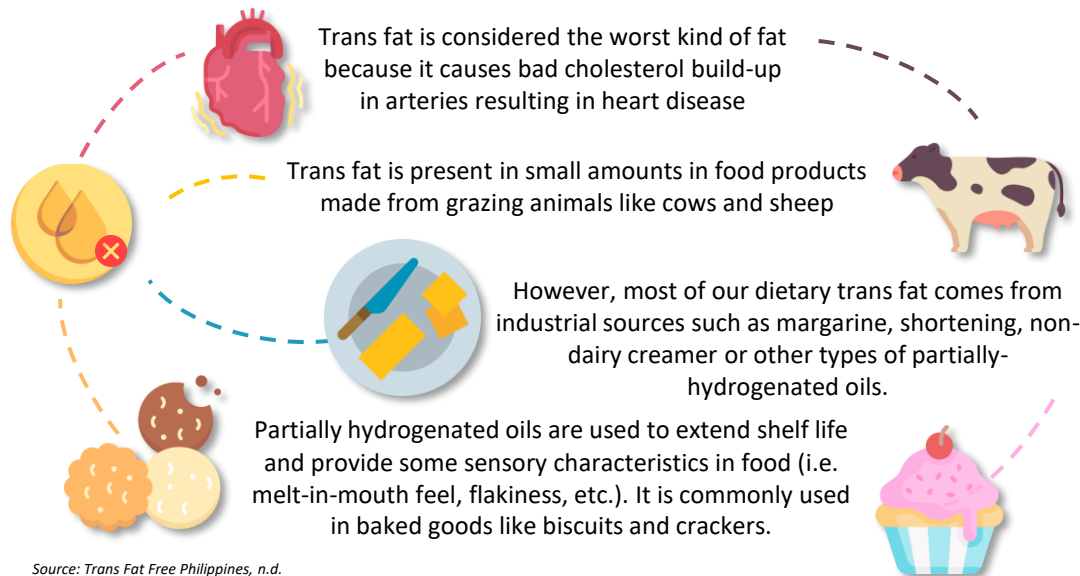
Forecast to register the  
fastest value growth during  
forecast period

## PROSPECTS AND OPPORTUNITIES





## ROAD TO TRANS-FAT FREE



Source: *Trans Fat Free Philippines*, n.d.

The Philippines' Department of Health has adopted a new administrative order to eliminate industrially produced trans fat from its food supply by 2023. It aims to reduce trans fatty acid intake among Filipinos to less than 1% of the recommended total energy intake.

Source: *Euromonitor International*, 2021



## ROAD TO TRANS-FAT FREE



### Maya Think Heart Whole Wheat Carrot Mix

- Cholesterol Free
- Zero Trans Fat
- High in Iron
- Product of Philippines

**Ingredients:** Cane Sugar, Whole Wheat Flour, Skimmed Milk Powder, Leavening (Baking Soda, Baking Powder), Iodized Salt (Salt and Potassium Iodate), Cinnamon Powder, \***Citric Acid**, Natural and Artificial \***Flavour**.

A weak, organic acid naturally found in citrus fruits. Most often used as a natural preservative or to add an acidic or sour taste to food and baked products.

Source: Bakerpedia, 2022a

## ROAD TO TRANS-FAT FREE



### Cowhead Original Crackers Trans Fat Free

- Trans fat free
- Contains no preservatives and colouring
- Product of Malaysia

**Ingredients:** Wheat Flour, Vegetable Oil (Palm Oil), Glucose Syrup, Salt, Leavening Agent (Ammonium Bicarbonate), \*Malt Extract, Full Cream Milk Powder, \*Rice Starch, Yeast and \*Soy Sauce Powder.

A flavour enhancer that has a savoury umami taste and a distinctive aroma

Rice is often used in cracker and chip production because it contributes to moisture control and texture and flow in the extruders. Thus, rice flour and rice starch can be incorporated into crackers to improve the crunchiness of crackers.

## ROAD TO TRANS-FAT FREE



Varieties: Original, 9 Grains, Pumpkin,  
Oat Bran

### IKO Sugar Free Crackers

- Made with nutritious grains that are high in fibre and are transfat-free. They are made with isomalt, a natural sweetener derived from the sugar beet, in place of sugar.
- Suitable for diabetics and vegetarians
- Product of Malaysia

**Ingredients for 9 Grains Crackers:** Wholemeal Flour, Vegetable Oil (Palm Oil with Potassium Sorbate), **\*Isomalt** (E953), Oats, Multi Grain Blend (Whole Brown Flax, Purple Wheat Flakes, Rye Flakes, Triticale Flakes, Hulless Barley Flakes, Millet, Sesame Seed, Spelt Meal, Quinoa), Polydextrose (E1200), Maltitol (E965), Starch, Raising Agent [Sodium Bicarbonate (E500)] and Emulsifier [Soy Lecithin (E322)].

Isomalt is a sugar substitute, a type of sugar alcohol used primarily for its sugar-like physical properties.

Benefits of Isomalt:-

- Low calories – 2kcal/g
- Very low blood glucose and insulin response
- Support gut health
- Anti-cariogenic and does not promote dental caries

Source: Calorie Control Council, 2022

## NATURAL & CLEAN LABEL



Filipinos show a preference for nutritious, clean label foods.

A survey conducted by Mintel found that consumers in the Philippines prioritise purchasing foods high in vitamins and minerals, followed closely by food made with natural ingredients.



Source: Lesaffre Philippines, 2022

### What is Clean Label Bread?



Clean label bread means baking with simple, trusted, wholesome ingredients that are familiar to the consumer.

It is a fast-growing trend, especially the younger generations who are looking for original, healthier and simpler products. This is creating a long-lasting customer adherence.

Source: Bakerpedia, 2022b



**3 in 4** Filipino consumers agree that food products with long shelf lives are less healthy than fresh alternatives.



Additionally, consumers are aware of the additives, preservatives and processes that give certain foods and drinks their extended shelf life. These ingredients are believed to have potential harmful long-term effects on health.

Source: Lesaffre Philippines, 2022



## NATURAL & CLEAN LABEL

### Mestemacher ORGANIC FLAX SEED + CHIA BREAD



Varieties: Whole Rye Bread, Sunflower  
Seed Bread, Fitness Bread

- High Nutrition: A dark & dense German rye bread. Packed with the whole grain goodness of rye with flax seeds & chia for a health-conscious diet
- Big on Taste: Traditional, slightly sour rye flavour. Make it yours and add your favorite sweet or savoury toppings for a satisfying snack or meal
- Certified Organic: Only the best ingredients go into every slice. Contains no preservatives. Suitable for vegetarian & vegan diets
- Low GI: A fast and filling, feel-good alternative to boring bread. Long shelf life up to 6 months
- Product of Germany

**Ingredients :** Grain†(Whole Rye Meal †, Whole Rye Flour†), Water, Golden Linseed† (5%), \*Chia Seeds †(Salvia Hispanica) (3%), Sea Salt, Yeast.

† Organic Farming

Chia seeds contain healthy omega-3 fatty acids, polyunsaturated fatty acids, dietary fiber, proteins, vitamins, and some minerals. Regular intake of chia lowers blood pressure levels, and reduces inflammation indicators, thereby reducing the cardiovascular risk.

## NATURAL & CLEAN LABEL



### Serious Organic Cookies (Double Chocolate)

- From the farm to the bag, these organic products are 100% traceable, and free-from chemical nasties. You can snack in a way that's sustainable for your body and sustainable for the world.
- These deliciously chewy cookies are made with a secret blend of plant-based ingredients – organic quinoa and coconut flours are baked with organic coconut oil and fair trade vegan dark chocolate.
- Certified Organic, Non-GMO, Dairy-Free, Gluten-Free, Soy-Free, Egg-Free, Vegan Friendly.
- Product of New Zealand

**Ingredients:** Gluten-free Flour Blend (\***White Rice Flour**†, Quinoa Flour†, Potato Flour†, Coconut Flour†), Raw Sugar†, Coconut Oil†, Fair-trade Dark Chocolate† (13%) (Sugar, Cocoa Liquor, Cocoa Butter, Sunflower Lecithin, Natural Vanilla \***Flavour**), Cocoa Powder† (7%), Baking Soda (Sodium Bicarbonate), Salt, Natural Vanilla \***Flavour**. († Certified Organic).

Chocolate contains 55% cocoa solids.

Rice flour is used as an alternative to wheat flour in gluten-free baked goods.

- ✓ It has a neutral flavor
- ✓ It's digested easily
- ✓ It is considered hypoallergenic

Source: Bakerpedia, 2022c

## NATURAL & CLEAN LABEL



### Dave's Killer Bread Powerseed Organic Bread

- No high fructose corn syrup, No artificial preservatives, No artificial ingredients
- Always power-packed with whole grains, Always USDA organic, Always Non-GMO
- Sweetened with organic fruit juices
- Product of USA

**Ingredients:** Organic Whole Wheat (Organic Whole Wheat Flour, Organic Cracked Whole Wheat), Water, Organic Powerseed Grain and Seed Mix (Organic Whole Flax Seeds, Organic Sunflower Seeds, Organic Brown Sesame Seeds, Organic Pumpkin Seeds, Organic Black Sesame Seeds, Organic Ground Whole Flax Seeds, \***Organic Rolled Oats**), Organic \***Wheat Gluten**, Organic Fruit Juices (Organic Apple, Organic Pear, Organic Peach), Organic Oat Fiber, Contains 2% or Less of Each of the following: Sea Salt, Organic Vinegar, Organic Cultured Wheat Flour, Yeast, Enzymes, Organic Acerola Cherry Powder.

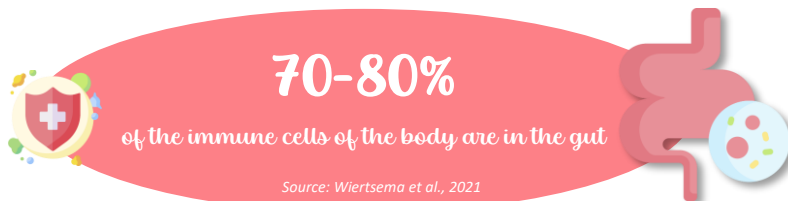
## GUT HEALTH & IMMUNE HEALTH

The main wellness priorities of Filipino consumers are strengthening the immune system, healthy eating and stress management.



- In recent years, more Filipinos have become aware about the importance of gut health for the immune system, thanks to various media and brand promotions.

Source: Lesaffre Philippines, 2022



Source: Wiertsema et al., 2021



When creating baked goods with added digestive health benefits, probiotics can be difficult to incorporate due to the limited availability of heat-resistant strains.



Prebiotic fibres offer formulation benefits for manufacturers and convenience for consumers. By incorporating prebiotic fibre into snacks and baked goods, consumers can meet their gut health needs without adding a new supplements.

Source: Hyslop, 2021



Staple bread roll in the Philippines commonly eaten for breakfast



While not as popular as *pandesal*, sourdough bread is now gaining popularity across the Philippines, particularly in Metro Manila. Besides being rich in vitamins and minerals, consumers perceive sourdough bread to be a more gut-friendly and easily digestible alternative to sweet white breads.

Source: Lesaffre Philippines, 2022




## GUT HEALTH & IMMUNE HEALTH



### Jeanne & Jamie's Recipes Digestives

- These yummy Digestives promote good digestion, as they contain prebiotic inulin fiber, which can help your body absorb more nutrients and helps boost your immunity.
- Product of Philippines

**Ingredients:** Wheat Flour, Sugar, Whole Wheat Flour, Vegetable Fat (Palm, Coconut), Honey, Oats, \***Inulin**, Raising Agent [Ammonium Bicarbonate (E503) and Sodium Bicarbonate (E500)] and Iodized Salt.



Inulin is a type of dietary fiber, research has linked it to several health benefits, such as improving digestive health, helping control diabetes, and aiding weight loss.

Sources: Abed et al., 2016; Shoaib et al., 2016

# GUT HEALTH & IMMUNE HEALTH

## Gardenia Whole Wheat Pandesal

- Healthy and still very tasty, Gardenia Whole Wheat Pandesal is made from all-cracked whole wheat that has vitamins which act as antioxidants protecting the body from free radicals. It is also a good source of Calcium and Fiber for your digestive health.
- Product of Philippines



The B vitamins are helpful in increasing nervous and immune system functions and reducing inflammatory responses

Source: Mahwish et al., 2022

**Ingredients:** Wholemeal Flour, High Protein Wheat Flour (with **Vitamins \*B1, \*B2, \*B3, \*Iron** & fortified with **\*Vitamin A**), Water, **\*Wheat Gluten**, Natural Honey, Refined Sugar, Whey Powder, Skimmed Milk Powder, Shortening (contains Palm Oil and/or Coconut Oil), Iodized Salt, Baker's Yeast, **\*DATEM** (dough improver), Calcium Propionate (to retain freshness), Mineral Yeast Food (yeast nutrient) and **\*Folic Acid** (vitamin fortificant).

Vitamin A is crucial for maintaining good vision, promoting growth and development, and protecting epithelium and mucus integrity in the body which has critical role in enhancing immune function.

Source: Huang et al., 2018

Iron has various effects on the immune system such as modulating immune cell proliferation and differentiation.

Source: Haschka et al., 2021

## GUT HEALTH & IMMUNE HEALTH



### ThinSlim Foods Zero Net Carb Bread Plain

- The Love-The-Taste Bread has only 45 calories and 0g of net carbs per slice.

The ingredients used digest significantly more slowly which means you stay satiated longer and your body doesn't turn the excess sugar into fat. This is very evident by the fact that of the 7g of total carbohydrates per slice, 7g of it is fiber.

- Product of USA

**Ingredients:** Wheat Protein Isolate, \*Vital Wheat Gluten, Oat Fiber, Modified Wheat Starch, Olive Oil, \*Chicory Root Fibres (Inulin), Yeast, Salt, Enzyme.

VWG (Vital wheat gluten) is a highly functional protein that has been separated from wheat starch and other grain components. It is used to improve dough strength and provide additional dough tolerance to processing variations, mainly fermentation times and temperatures.

Source: Bakerpedia, 2022d

## GUT HEALTH & IMMUNE HEALTH



### Hearty Bread Moringa Sourdough Pandesal

- Hearty Bread sourdough loaves are made with GF Flour that is fortified with *Lactobacillus protectus* thereby creating a unique flavor and promotes optimum digestion
- Product of Philippines

**Ingredients:** *Lactobacillus protectus* (Probiotics), Fresh Moringa Leaves, Gluten-Free Flour, Butter, Milk, Salt, Yeast.





To know more about the featured ingredients in this market trends report as well as how you can create better food products for your consumers, contact our Food & Beverage Intelligence (FBI) team.

**Email:** [info@dpointernational.com](mailto:info@dpointernational.com)

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