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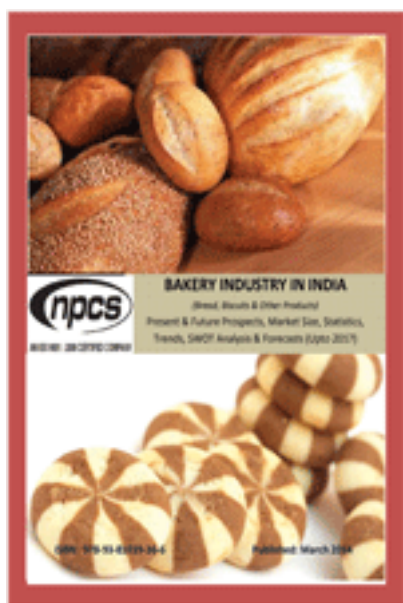
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Bakery Industry in India (Bread, Biscuits and Other Products) Present & Future Prospects, Market Size, Statistics, Trends, SWOT Analysis and Forecasts (Upto 2017)



<b>Code:</b>	ENI265
<b>Format:</b>	Paperback
<b>Indian Price:</b>	30000
<b>US Price:</b>	980
<b>Pages:</b>	
<b>ISBN:</b>	9789381039366
<b>Publisher:</b>	NIIR PROJECT CONSULTANCY SERVICES

The market research report titled 'Bakery Industry in India (Bread, Biscuits and other products) – Present & Future Prospects, Market Size, Statistics, Trends, SWOT Analysis and Forecasts (Upto 2017)' released by Niir Project Consultancy Services, provides a comprehensive analysis on Indian bakery industry covering detailed reporting of the bread and biscuits sector in India. The report also provides a bird's eye view of the global bakery industry with details on projected market size and then progresses to evaluate the Indian industry in detail. The report elucidates the structure of Indian bakery industry, its classification in various products (Biscuits, bread, cakes, pastries, buns and rusks) and then provides a categorical overview of bread and the biscuits sector. The Indian biscuit sector is dominated by players like Britannia, Parle and Sunfeast brand (ITC) together with other small players like Priyagold, Anmol Biscuits, Cremica etc whereas bread sector has only two major players, Britannia and Modern; and a host of regional players like Harvest Gold, Bonn, Vibbs etc.

The report provides an expansive market analysis of the Indian bakery sector by covering areas like growth drivers, trends prevailing in the industry as well as comprehensive SWOT analysis of the sector. The report identifies growth factors of the industry as changing perception of the bakery products coupled with changing lifestyles of the Indian population. Consumption of bakery products was not in the Indian culture; however with changing eating habits of the people and with rising western influence on food consumption patterns, bakery products today have got takers from all age groups in the country. Rising preference for premium biscuit category is another factor that will contribute in the volume growth for the industry. Glucose segment has been losing its share to categories like cookies and cream biscuits which are growing at a much higher rate than the overall biscuit sector. Also the industry has been experiencing fortification of the bakery products in order to satiate the burgeoning appetite of the 'health conscious' Indian. Numerous healthy products have been launched in the bakery segment and are gaining popularity at a high rate. Mounting presence of bakery chains has further triggered the growth in the sector. Several international bakery chains have entered in India recognizing potential of the industry.

Trends that have been gaining ground in the sector are e-retailing of the bakery products, aggressive expansion plans of the incumbents as well as technological and ingredients advancement. Just when you thought that electronics and clothes were the only popular categories in e-retailing, there came bakery products which have been gaining traction in the e-retailing segment. Bakers are also bringing innovation and advancement in the technology and ingredients they use. Packaging front has also seen some changes in the past years.

The report further evaluates the position of the industry by providing insights to the SWOT analysis of the industry. Large Indian population, abundant supply of raw materials and low capital requirements are some strengths of the bakery segment in India. India is among top producers of key raw materials of the bakery industry which puts sector in the sweet spot. The sector faces challenges in the form of raw material fluctuations, high taxation as well as its unorganized nature. Industry's raw materials being agricultural in nature are exposed to seasonal fluctuations in terms of availability and price movements. Rising competition in the sector due to low capital requirements and high growth rate of the sector is another impediment faced by the industry. However even after such challenges, the industry has opportunities galore. Low consumption of bakery products in the industry and spurt in the organized retail in the country are some of the biggest opportunities for the bakery players. Rising incomes as well as emergence of new middle class segment will also be key factors in the growth for the industry. Indian bakery segment is already in a favorable position with high rural penetration of its products which will help it tap the Indian rural consumption boom.

The next segment of the report scrutinizes the demand supply scenario of the bakery industry with projections of important numbers covering the overall bakery sector as well as biscuit and bread segment

also. The report also provides you a succinct view on the foreign trade of bakery products. It captures the current market size of the sector as a whole together with bread and biscuit segment coupled with forecasts for the next five years. The report also includes key player profiles of players like Britannia Industries Ltd, Parle Products Ltd, ITC Ltd, Surya Food & Agro Ltd (Priyagold) and Modern Food Industries India Ltd. The report shares vital information like shareholding pattern, revenue mix, plant location and financial summary of the aforesaid companies. The next segment provides complete financial comparison of bakery companies in India.

Indian bakery industry is one of the biggest sections in the processed food industry of the nation and has undergone a massive change majorly on account of changing perception of bakery products and evolving consumer tastes. Rising urbanization and growth in the disposable incomes of the Indian population has proven to be a magnet for international bakery chains owing to which the sector has seen an influx of foreign bakery companies foraying into India which has helped in improving the quality of Indian bakery products. Today there is a constant effort by the bakery players to innovate their product line to match up to Indian palate. Driven by evolving perception of bakery products in India, consumption boom in the nation and changing consumer preferences, we estimate the Indian bakery industry to touch levels of INR 483 billion in the next five years.

**Reasons for Buying this Report:**

- This research report helps you get a detail picture of the industry by providing overview of the industry along with the market structure and classification
- The report provides market analysis covering major growth driving factors for the industry and latest market trends in the industry
- This report helps to understand the present status of the industry by elucidating a comprehensive SWOT analysis and scrutiny of the demand supply situation
- Report provides analysis and in-depth financial comparison of major players/competitors
- The report provides forecasts of key parameters which helps to anticipate the industry performance

**Our Approach:**

- Our research reports broadly cover Indian markets, present analysis, outlook and forecast for a period of five years.
- The market forecasts are developed on the basis of secondary research and are cross-validated through interactions with the industry players
- We use reliable sources of information and databases. And information from such sources is processed by us and included in the report

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## EXECUTIVE SUMMARY

The Indian food industry has grown from strength to strength in the past few years with recent upswing in the packaged and processed food industry. Indian bakery industry is one of the biggest sections in the processed food industry of the nation. The rising foreign influence, emergence of female working population and changing consumption patterns have attributed strongly in the growth trajectory of the bakery industry. Indian bakery industry has undergone a massive change majorly on account of changing perception of bakery products and evolving consumer tastes. Bakery products are items of mass consumption due to their affordability and nutrition content.

### Trends in the Industry

- E-retailing of bakery products
- Expanding foothold
- Improved Packaging
- Innovation in ingredients

Rising urbanization and growth in the disposable incomes of the Indian population has proven to be a magnet for international bakery chains. India has seen an influx of foreign bakery companies foraying into India which in turn has helped in improving the quality of Indian bakery products. Today there is a constant effort by the bakery players to innovate their product line to match up to Indian palate. Driven by evolving perception of bakery products in India and changing consumer preferences, Indian bakery industry will touch levels of INR 483 billion in the next five years.

## 1. OVERVIEW

The Indian food industry has grown from strength to strength in the past few years with recent upswing in the packaged and processed food industry. Indian bakery industry is one of the biggest sections in the processed food industry of the nation. The rising foreign influence, emergence of female working population and changing consumption patterns have attributed strongly in the growth trajectory of the bakery industry. Let's have a look at the status of global bakery industry.

### 1.1 The Global Scenario

Global bakery industry grew at an annual rate of ~6.5 % y-o-y during 2007-13 and leading research associations project the global industry to grow at a CAGR of ~7% in the next few years. The global Bakery Products market is forecasted to reach US\$447 billion by the year 2017, driven by new consumer preferences for conveniently portioned and easy-to-consume bakery goods.

Figure 1 Global Bakery Products Industry- Market Size

Source: Industry Data

Europe is the leading producer and consumer of bread and bakery products as these products are deeply embedded in their national and religious diets.

In the global bakery products market, wafers, waffles, and sweet biscuits account for 33.4% of the demand while the remaining market share is divided between toasted bread, rusks, and other toasted products at 2.0%, crispbread 1.1%, gingerbread 0.8%, and other type of bakery products 62.7%.

The bakery products market in developed regions such as North America, and Western Europe is comparatively matured, and future growth is will be derived primarily from the emerging markets of Asia-Pacific, Latin America, Eastern Europe, and the Middle East. India, as projected, will be a high growth market for bakery products in the coming years.

### 1.2 The Indian Scenario

Baking in India is a traditional activity and has gained ground in the last few decades. Baking breads and



cakes wasn't really a part of the Indian culture and the notion became popular only with the changing perceptions and evolving lifestyles of Indian population. Today bakery products hold a major place in the Indian food processing industry. Indian bakery industry is dominated by unorganized sector with ~ 60 % of the market share.

Figure 2 Indian Bakery Industry- Structure

Source: Industry Data

### 1.2.1 Classification of the Industry

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