

SWEET BISCUITS – GERMANY – 2020



Create excitement with new flavours, encourage consumption as a more regular treat with healthier options and grow appeal with portable and portionable options.



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Report Content

EXECUTIVE SUMMARY

- COVID-19's impact on sweet biscuits and German consumer behaviour
- Mintel's perspective

Market context

- COVID-19 impacting on German consumers
- Ageing population in Germany poses a challenge for sweet biscuits
 - Graph 1: population by age group, 2014-24
- Sugar fears challenge sweet biscuit categories
- Sugar fears challenge sweet biscuit categories
- Limiting packaging's environmental impact is crucial

Mintel predicts

- Increasing consumption frequency is vital for category growth
- Value will see modest growth until 2024
- Volume drops in 2018 due to the exceptionally hot weather and will continue to fluctuate
- The impact of COVID-19 on sweet biscuits
- Value sales will see modest growth until 2024
- After a short boost in 2020 due to COVID-19 volumes will continue to fluctuate

What consumers want and why

- Consumers want: healthier sweet biscuits
- Consumers want: healthier sweet biscuits
- Consumers want: novelties in flavours
- Consumers want: portion-size packs
- Consumers want: portion-size packs
- Consumers want: biscuits suitable for 'me' time

Opportunities

- Create excitement with new flavours
- Healthier versions are an opportunity to achieve category growth
- Portionability increases permissibility
- Portionability increases permissibility

The competitive landscape

- Bahlsen is the biggest manufacturer, followed by Mondelēz

- Private label retains a strong lead in sweet biscuit sales
 - Graph 2: company retail market share of sweet biscuits by volume and value, 2019

Marketing mix

- A snapshot of the sweet biscuit category in Germany
- Quick download resources

MARKET DRIVERS

- One in four Germans are worried about being exposed to COVID-19
 - Graph 3: level of concern over the risk of being being exposed to the Coronavirus (also known as COVID-19)?, 3-16 March, 2020
- Germans are equally concerned about the impact on their lifestyle
 - Graph 4: level of concern over the affect of COVID-19 on the lifestyle?, March 3-16, 2020
- Sugar fears challenge sweet biscuits
- Sugar remains in the spotlight as a health foe
- Sugar remains in the spotlight as a health foe
- Ageing population in Germany poses a challenge for sweet biscuits
 - Graph 5: population by age group, 2014-24
- Environmental impact of convenience
- Government intervenes to reduce packaging waste
- Portionability conveys the idea of responsibility and control besides being a convenient format
- Many consumers lead on-the-go lifestyles
- On-the-go breakfast is an opportunity for biscuits
 - Graph 6: frequency of eating breakfast on-the-go, by age, July 2018

WHAT CONSUMERS WANT AND WHY

Consumption of biscuits

- Nine in ten German adults eat sweet biscuits
- Other sweet biscuits are most popular
 - Graph 7: frequency of eating biscuits in the last three months, January 2020

Consumption of biscuit bars and other sweet biscuits

- Biscuit bars appeal most to 16-34s and parents
 - Graph 8: frequency of eating biscuit bars in the last three months, by age and parental status, January 2020
- Younger consumers and parents are also strong targets for purchasing other sweet biscuits
 - Graph 9: frequency of eating other sweet biscuits in the last three months, by age and parental status, January 2020

Consumption of breakfast biscuits

- Breakfast biscuits are popular among parents
 - Graph 10: frequency of eating breakfast biscuits by parents of under-18s vs non-parents and parents of over-18s, January 2020
- Half of German adults eat breakfast on the go
- Half of German adults eat breakfast on the go
- belVita breakfast biscuits in Germany

Locations and occasions for consuming sweet biscuits

- At home is the place for biscuit consumption
 - Graph 11: locations where sweet biscuits are eaten, January 2020
- Biscuits positioned for on-the-go eating
- Accompanying hot drinks is the preferred way to eat sweet biscuits
 - Graph 12: ways in which biscuits are eaten, January 2020
- Suggest new biscuit eating experiences
- Innovative suggestions for inventive combinations
- Familiar, but neglected suggestions for the biscuit eating experience

Attitudes towards sweet biscuits

- Moderate sweetness and crunchiness are the key attributes of perfect biscuits
 - Graph 13: key attributes of the perfect biscuit, January 2020
- Interest in biscuit textures
 - Graph 14: texture attributes of the perfect sweet biscuit, by age and parental status, January 2020
- Perceptions of the perfect sweet biscuit differ between women and men
- Perceptions of the perfect sweet biscuit differ between women and men
 - Graph 15: key attributes of a perfect sweet biscuit, by gender, January 2020
- Established biscuit brands need to evolve to remain relevant
- Make freshly baked biscuits convenient
- International inspiration for freshly baked sweet biscuits

Interest in new sweet biscuits

- Sweet biscuit eaters are open minded
 - Graph 16: frequency of trying new types and flavours of sweet biscuits, January 2020
- Flavour innovation trails behind
- Flavour innovation trails behind
- Combine flavours for more variety
- International inspiration for flavour and colour
- Target adult snackers with sophisticated flavoured biscuits
- International inspiration for adult flavours – alcohol

- International inspiration for adult flavours – coffee
- Balance indulgence and permissibility
 - Graph 17: frequency of choosing healthier biscuits over regular ones, January 2020
- Low sugar is the nation's top health factor for food
 - Graph 18: most important factors when looking for healthy foods, Q4 2018

Attitudes towards healthy biscuits

- Sweet biscuits remain a pleasure Germans are unwilling to give up
 - Graph 19: attitudes towards sweet biscuits, January 2020
- Germans want food that makes them feel good in short and long term
- Germans want food that makes them feel good in short and long term
- Biscuits for a boost of energy and better focus
- Use of familiar ingredients for functional benefits
- Use familiar nutritious ingredients to tap into the market for healthier biscuits

Behaviours towards sweet biscuits

- 'Me' time and company are both associated with biscuit consumption
 - Graph 20: behaviours towards sweet biscuits, January 2020
- Help consumers to get mind and body in balance
- Cookies for body and mind
- Premiumisation through indulgent brands
- Increase consumer interest through limitation
- Portion-control packs allow permissible snacking
- Portion-control packs allow permissible snacking

LAUNCH ACTIVITY AND INNOVATION

- Top 10 sweet biscuit flavours remain constant over time
 - Graph 21: sweet biscuits launches by top 10 flavours, 2015-19
- Bring newness into chocolate flavoured biscuits
- Use even newer kinds of chocolate
- Fight flavour fatigue with new tastes
- Crunchy remains top texture for sweet biscuits
 - Graph 22: sweet biscuits launches by top five textures, 2016-19
- Combine textures for more variety
- New ways to eat 'biscuits'
- Aldi brands lead for sweet biscuit NPD
 - Graph 23: sweet biscuit launches by ultimate companies, 2019
- Natural & ethical/environmental are top claims in Germany

- Graph 24: biscuits launches by top 10 claim categories, 2015 vs 2019

- Natural claims have lost their uniqueness
- Helping to support organic farming
- Biscuits that support sustainable bee-keeping
- Biscuits that help employ disabled people
- Decrease in launches of environmentally friendly or recyclable packaging

- Graph 25: sweet biscuits launches with environmentally friendly and/or recyclable packaging claims, 2015-19

- Low-sugar launches gain share rapidly in 2019

- Graph 26: launches of sweet biscuits with select health claims, 2015 vs 2019

- The clearest means of communicating health in the cookie space is through low-sugar claims
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- Use familiar nutritious ingredients to tap into the market for healthier biscuits
- The clearest means of communicating health in the cookie space is through low-sugar claims
- Low/no/reduced sugar biscuits appeal to the health-conscious consumer
- Fortified protein and vitamin content can boost healthful perceptions
- Plant-based proteins could drive acceptance of high-protein biscuits
- High-protein biscuits should not only appeal to athletes
- Single-serve and individually-wrapped biscuits have a key role to play in the on-the-go trend
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- Individually-wrapped biscuits have a key role to play in the on-the-go trend and for portion control

Advertising

- Focus on the experience of eating biscuits
- "Crisp, flip or dip"
- "A touch of security"

MARKET SHARE

- Bahlsen is the biggest manufacturer followed by Mondelēz
- Bahlsen sees largest growth in value...
- ...and gains the most share by volume in 2019

MARKET SIZE AND FORECAST

- Note on forecast in response to COVID-19
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- The impact of COVID-19 on sweet biscuits
- The impact of COVID-19 on sweet biscuits
- NPD is crucial to drive growth

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- Value will continue to grow if the industry copes with its challenges
- After a short boost in 2020 due to COVID-19 volumes will continue to fluctuate
- Value will see modest growth until 2024
- Volume drops in 2018 due to the exceptionally hot weather and will continue to fluctuate

APPENDIX

Appendix – products covered, abbreviations and consumer research methodology

- Abbreviations
- Products covered in this Report
- Consumer research methodology
- Other sweet biscuits are most eaten...
 - Graph 27: frequency of eating other sweet biscuits* in the last three months, January 2020
- ...followed by biscuit bars...
 - Graph 28: frequency of eating biscuit bars in the last three months, January 2020
- ...and way ahead of breakfast biscuits
 - Graph 29: frequency of eating breakfast biscuits in the last three months, January 2020
- Breakfast on the go is no rarity
 - Graph 30: frequency of eating breakfast on the go, July 2018

Appendix – launch activity and innovation (optional)

- Top 10 sweet biscuit flavours remain constant over time
 - Graph 31: top 10 flavours in sweet biscuits, 2015–2019
- ALDI leads the sweet biscuit NPD
 - Graph 32: sweet biscuit launches by ultimate companies, 2015–19

Appendix – market size and forecast

- Forecast methodology prior Covid-19
- Forecast methodology – fan chart
- Market size and forecast – value
- Market size and forecast – volume
- Market size and forecast prior Covid-19 – value
- Market size and forecast prior Covid-19 – volume

Germany: retail value sales of sweet biscuits, best- and worst-case forecast, 2019–24

- Market size and forecast – value – best- and worst-case

Germany: retail volume sales of sweet biscuits, best- and worst-case forecast, 2019–24

- Market size and forecast – volume – best- and worst-case

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