

# Bakery industry tackles fiber deficit globally

*Through wheat breeding, improved flour characteristics and global partnerships, bakers around the world into consumers' need for more fiber in their diets.*

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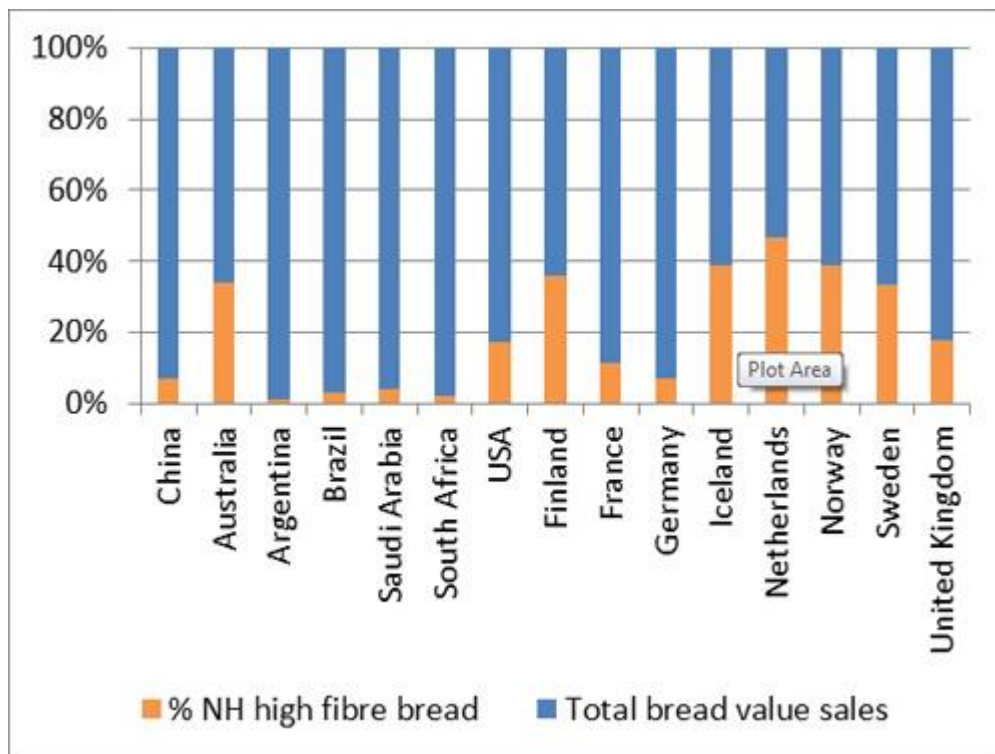
Consumers know that fiber is good for them, but growth of high fiber bakery could be more buoyant. The industry is tackling the issue on three fronts: by breeding grains that are higher in fiber to start with, improving the characteristics of flour made from whole grains and forming partnerships to promote products.

## **High fiber baked foods maintain moderate growth**

On a global level, naturally healthy (NH) high fiber baked foods was one percentage point higher in value growth terms this year than last, growing at 2% in 2012. At this level, NH high fiber baked foods matches the growth recorded for NH packaged food during the year and is one percentage point less than the 3% value growth achieved by all health and wellness foods and beverages combined.

Despite not standing out as a major growth driver for bakery as a whole on a global level, NH high fiber baked foods is a category of key importance, accounting for 36% of total NH packaged food, with global value sales amounting to €25 billion (US\$34 billion). With €16 billion (US\$22 billion) in value, NH high fiber bread claims almost two thirds of this figure.

The US is the largest market for NH high fiber bakery products, generating value sales worth €5.8 billion (US\$7.8 billion) in 2012. Retail volume sales of NH high fiber bread in the US market accounted for 18% of total bread retail volumes in 2012, up from 14% in 2007. This must be viewed in the context that overall bread sales declined over this period while those of NH high fiber bread rose.



Consumers have become increasingly aware of the fact that an adequate intake of dietary fiber is important not only for healthy digestive functioning but also for the prevention of cardiovascular disease, the world's leading cause of death. Although this figure varies by region, it is highest in Eastern European countries such as Poland, Ukraine, Russia, Bulgaria, Romania and Lithuania, some of which register more than 1000 deaths per 100,000 of the population. Public health campaigns frequently stress that the best sources of dietary fiber are fruit, vegetables, legumes and products made from whole grains.

Whole grain flour, however, struggles with a number of issues, such as the poor performance of dough in industrial processing, a comparatively short shelf life and a dense texture, which is not universally popular with consumers.

### **Kraft puts its weight behind fiber**

The industry is constantly working on improving these products. In November 2012, for example, global food giant Kraft Foods, Northfield, Illinois, US, announced that it had developed a novel production process resulting in stabilized wheat flour. The process features a number of highly desirable properties, including improved performance in industrialized baking processes, extended shelf life, a high nutrient and antioxidants content and a non-gritty mouthfeel.

Kraft deems its new flour, for which a patent application is currently pending, ideal for biscuits, crackers, breakfast cereals and snack products. This innovation could help boost the dynamism of NH high fiber biscuits and NH high fiber breakfast cereals, which have been notably lagging behind sales of NH high fiber bread in Kraft's US market.

Euromonitor International predicts that among the top global growth markets for NH high fiber biscuits in both value and volumes over the 2012-2017 forecast period will be China, Colombia, Argentina and Morocco, with all growing in excess of 10% CAGR in value terms. For NH high fiber breakfast cereals, Turkey, India, Brazil and South Korea are the four markets envisaged to lead value growth to 2017. As Kraft is a company with a highly sophisticated global distribution network, it should be able to take full advantage by focusing new product launch strategies on these most dynamic markets.

## **Grain bred for fiber**

Besides finding new ways of processing wholegrain flour, specialized plant breeding also has a role to play in augmenting the fiber content of bakery products.

There are three types of dietary fiber: soluble fiber, insoluble fiber and resistant starch. In 2011, the European Food Safety Authority (EFSA) issued a positive opinion relating to the health benefits of bakery products high in resistant starch, which has particular relevance in managing diabetes.

In May 2012, a study published in the “BMC Plant Biology” reported on the creation of a novel variety of wheat with a high proportion of resistant starch. Many previous efforts to achieve this have involved genetic engineering, but this avenue is not really a viable one, as it would run into serious consumer acceptance issues in most regions. This is especially true as health-and-wellness-positioned foods are associated with beneficial effects for consumers on their overall feelings of health and well-being. This successful attempt employed a technology called Targetin Induced Local Lesions in Genomes (TILLING) to enhance resistant starch levels, which is classed as a non-GM technology.

## **Partnerships promote bread consumption**

NH high fiber bakery products not only have to be produced, but they also need to be effectively marketed to consumers. Individual product and brand promotions are the usual routes that manufacturers take, but promotional initiatives launched by industry organizations in partnership with governments and research institutions can also help further the popularity of healthy bakery products.

HealthBread, a 2-year EU-funded project, which commenced in October 2012 and continues the HealthGrain project completed in 2010, aims to develop bread that looks like white bread to suit consumer preferences for this type while containing the same nutritional benefits in terms of dietary fiber, vitamins, minerals and antioxidants as whole grain bread. In addition, the project will also attempt to develop a wider range of wholegrain bread types and products as well as marketing all these products to boost their commercial viability. The HealthBread consortium consists of 17 partners, comprising a group of Austrian, German, Italian and Dutch bakeries, several research organizations and ingredient suppliers.

The HealthBread project may go some way toward reviving the almost stagnant performance of NH high fiber bread in many European markets. Ideally, well-coordinated and well-focused projects like HealthBread will increase the consumption of NH high fiber bread, which hovers below the 10% mark of total retail bread volumes in most of Europe up to levels in Scandinavian countries ranging from 33-39%

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