

Sourdough - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Sourdough Market size is estimated at USD 2.45 billion in 2024, and is expected to reach USD 3.30 billion by 2029, growing at a CAGR of 6.13% during the forecast period (2024-2029).

The COVID-19 pandemic pressed several countries worldwide to impose severe restrictions on the movement of goods to mitigate the spread of the virus. The pandemic risked increasing deflationary pressure due to nationwide curfews as people stay-at-home more and spend less on-out of home consumption, which affected sales of artisanal products, including cakes, pastries, and others but not to a more significant extent as consumers depended on online delivery of food and beverage products, including bakery products. On the other hand, packaged bakery products with higher shelf-life witnessed growth in demand. Consumers turning to on-the-go snacking products and reduced consumption of bakery products also returned to bakery products intending to have a balanced diet. Above all, the demand for fortified bread increased, for consumers sought to maintain their immunity by consuming nutritious food.

Sourdough bread contains lower amounts of gluten, lower levels of antinutrients, and more prebiotics, all of which help improve digestion. The application of sourdough products is a healthier alternative to those made using regular dough, thus driving the market demand for sourdough. The presence of lactobacillus and wild yeast helps neutralize the acid in the leaven (phytic acid), thus making sourdough products such as bread and buns, cakes and pastries, waffles and cookies, easily digestible, unlike those made from regular dough. Moreover, the presence of other essential nutrients in sourdoughs, such as folic acid, magnesium, iron, B vitamins, and zinc, make these products a preferred choice among consumers worldwide, owing to their increased health benefits driving the growth of the sourdough market.

The rise in development in application industries like pizza, bread, and buns and the growing popularity because of its flavor,

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keeps well, and healthier than regular bread are further factors that are estimated to cushion the growth of the sourdough market. Some key players are focusing on expanding their product portfolio to satisfy demands. For instance, in 2021, Puratos USA launched Sapore Leo Organic in its sourdough product range, which was made with 100% organic whole wheat and naturally fermented to achieve a mild acid flavor. This sourdough can be used in various applications, including pan bread.

Sourdough Market Trends

Surging Demand for Functional Baked Goods

Over the review period, the global marketplace witnessed a consistent rise in the demand for bread, buns, cakes, pastries, and other baked goods. Furthermore, consumers worldwide sought bakery products that offer functional benefits and suit their specific dietary needs and preferences. Hence, many manufacturers have offered baked products made from sourdough to cater to consumers' shifting priorities. These products are considered healthier alternatives to those made using regular dough, owing to the presence of lactobacillus and yeast, which neutralize acids in the dough, thus making these products easily digestible, unlike those made from regular dough. In addition, the scientific study "Functional and Healthy Features of Conventional and Non-Conventional Sourdoughs," published in the Applied Sciences journal in MDPI in April 2021, reported that sourdough fermentation could lower the glycemic index, increase mineral bioavailability, reduce gluten content, and reduce starch digestibility, mainly through the production of organic acids and other complementary mechanisms.

Growing awareness regarding the benefits of sourdough among consumers belonging to developed economies, such as the United States, Canada, the United Kingdom, and France, increased the demand for sourdough products, thus, propelling its demand in these regions. Furthermore, the sourdough market in the Asia-Pacific region has been growing owing to consumers' changing lifestyles and dietary habits and economic development in countries such as India, Singapore, Australia, China, and South Korea. Over the past few years, these countries have been importing many bakery ingredients, including sourdough, from the developed countries of Europe and North America. This factor helped propel the growth of the market in the region. Thus, the growing demand for fresh and functional bakery and patisserie products helped augment the demand for sourdough around the globe over the review period, propelling the market's growth.

Europe is Dominating the Market

Traditional sourdough cultures are rising across Europe, with ingredient companies investing in them for commercial use and fast-track solutions. Sourdough is embedded in the European bread culture owing to a large consumer base. Manufacturers offer specialty bread and bakery products from sourdough to cater to consumer demand. The United Kingdom is a remarkable producer of baked food products and one of the leading countries in bakery products across Europe. The bakery industry is rapidly growing in the country, owing to the fast-moving lifestyle and increasing population in the working community. The European bakery industry is innovating rapidly, with 37% of professionals saying they are looking to new product development to help counter the impact of the COVID-19 pandemic, while 36% are focusing on product reformulations, according to a recent Tate & Lyle PLC survey conducted in December 2020. The survey stated that reduced sugar and calorie products are the biggest drivers of business growth as consumers seek healthier options. Thus, manufacturers focus on offering such products, driving the demand for low-calorie bakery raw materials. Pizza is a food of great cultural significance in Italy, with a long history associated with the local cuisine. Sighting the growing demand among consumers for sourdough pizza bases owing to their related benefits, the retail manufacturers and the foodservice sectors started introducing sourdough bases to cater to consumers, which, in turn, created a vast opportunity for ingredient manufacturers to boost their growth in the market. There is a significant emphasis on local-origin products, which can help to increase profitability. For instance, in March 2021, Philibert Savours, a key player in the sourdough market, invested EUR 15 million to build a new factory in Crottet, of 4,000 sq. mt., with a capacity of 6,000 ton.

Sourdough Industry Overview

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The market is competitive, with numerous local and international players competing for a significant market share. They compete using various strategies, from advertisements to brand building and maintaining food safety guidelines. Puratos Group, IREKS GROUP, Lallemand Inc., Lesaffre International Corporation, and Philibert Savours SAS are some major players operating in the market studied, who hold dominant positions, closely followed by Advanced Enzyme Technologies and Lantmannen. The rising penetration of independent full-service restaurants, coupled with the increasing popularity of functional bakery products in developing countries such as India and China, offers expansion opportunities to the market players. Furthermore, they are adopting competitive strategies by expanding their new outlets and products. For instance, in November 2021, to serve customers in the United Arab Emirates and the larger GCC region in developing their skills and providing much-needed exposure to new, disruptive revolutionary baking solutions, Lesaffre opened its 48th Baking Center™ in Dubai as part of its network growth strategy.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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