

EUROPEAN

WORLD BAKER & BISCUIT

Issue 1 (192) | Vol. 32 | 2024

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WEEKLY NEWSLETTER

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TECHNOLOGY

Rolling in Dough:
How Precision
Sheeting Keeps
Bakeries Ahead of
the Curve



Fusion Flavors are Reshaping Bakery Delights



From spicy chocolate to spicy honey, products infused with arbol peppers, gochugaru, and tajin seasoning are captivating consumers seeking new sensations.

Tudor Vintiloiu

As the baking industry continues to evolve, staying ahead of emerging taste trends is paramount for success. Kerry's recently released 2024 global taste charts, "A World of Future Tastes," offer invaluable insights into the flavors shaping the future of baked products and snacks.

One notable trend highlighted in Kerry's research is the increasingly inventive crossovers of international cuisines, influencing baked goods in unexpected ways. For instance, Filipino and American fusion dishes like Halo-Halo inspired cocktails, ube burgers, and adobo chicken sandwiches are gaining traction in the US market, presenting exciting opportunities for bakery innovation.

Moreover, spice – both literal and figurative – is adding a dash of excitement to everyday baked goods. From spicy chocolate to spicy honey, products infused with arbol peppers, gochugaru, and tajin seasoning are captivating consumers seeking new sensations, thereby inspiring bakery product developers to experiment with bold flavor profiles.

The influence of social media on young consumers is driving a demand for bold and unusual flavor combinations. Sweet-savory pairings like bacon milkshakes, coffee infused with black garlic, and chocolate bars with wasabi are just a few examples of the innovative creations capturing the attention of adventurous palates.

Even familiar flavors like orange are undergoing a transformation, with varietal and floral twists appealing to health-conscious consumers seeking vitamin C-rich options. Additionally, the popularity of fruits like Yuzu is on the rise across multiple markets, presenting opportunities for bakery products infused with this exotic citrus flavor.

As Kerry's Global Consumer Research and Insights Director, Soumya Nair, emphasizes, these rapidly changing taste trends present both challenges and opportunities for bakery brands. By embracing innovation and creativity, bakeries can stay ahead of the competition and craft products that resonate with evolving consumer curiosity, through the fusion of global cuisines, the allure of spice, and the quest for novelty. •



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Annual subscription: one year £30/€60/US\$77 and two years £50/€100/US\$130.
Subscribe online: www.worldbakers.com/subscribe
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Printed by:
Sothis
ISSN: 2537 - 1932



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DS Smith Extends Sustainable Packaging Deal With Mondelez



DS Smith, global provider of fiber-based sustainable packaging solutions, announced a second consecutive five-year contract agreement to be the sole supplier of corrugated packaging in Europe for Mondelez International, one of the world's largest snacking companies. The cooperation will enable the

companies to further build on their R&D programmes and to deliver bespoke sustainable packaging solutions with a radical joint innovation programme and roadmap. A key shared objective is to ensure that supply chains continue to be resilient, and to help to keep products on shelf irrespective of unprecedented market conditions. New fiber-based sustainable packaging solutions will be implemented across European markets, and both companies will work closely together to reduce the use of single use plastics and utilize joint efforts to hit a target of Net Zero emissions by 2050.

The companies will deliver against promises to shape the most sustainable and economically viable packaging solutions over the next five years.

Alland & Robert Expands Normandy Production Facility

With the opening of a fourth production line at its factory in Saint-Aubin sur Gaillon, Normandy, Alland & Robert is increasing its production capacity by 50% while continuing to pursue its commitment to reducing greenhouse gas emissions. After two years of upgrade work, the Saint-Aubin sur Gaillon facility, first opened in 2007, has been expanded: a new drying tower and adjacent workshop have been added to the two existing towers, doubling the production facility from 8,000sqm to 16,000sqm. In order to undertake this facility upgrade, the company mobilized investments of over EUR11m.

With the opening of this new production line, Alland & Robert will have the capacity to process almost 30,000 metric tons of acacia gum per year, up from 20,000 today – a 50% increase in production capacity. This investment will enable the company to keep pace with the sharp rise in global demand. At the local level there will be a real impact in terms of employment, with over 30 jobs being created by the new production line.



Koenig Technology Projektmanagement Has New CEO



The management of Koenig Technology Projektmanagement GmbH has been expanded: Harald Burgstaller has been appointed CEO with immediate effect.

With his extensive experience, Burgstaller will play an important role in the further development and expansion of complete turnkey solutions and integration projects, says the company. Harald Burgstaller, who held management positions at renowned companies in the bakery machinery industry before joining Koenig in 2023, knows the markets, products and needs of bakers.

“Against the backdrop of a very dynamic international market environment, we are convinced that with Harald Burgstaller and the experienced team of the branch manager in Italy, Nicola Perbellini, we will be able to successfully master the challenges ahead of us in the field of turnkey systems and continue on our growth path,” said Koenig CEO Hannes Stelzer.

The Koenig Group has been a manufacturer of high-quality and innovative bakery technology since 1966 and the product program covers the entire production chain of bakery technology.

EUROGERM Acquires Improver Maker Teltomalz

The EUROGERM Group strengthens its presence in Germany by integrating Teltomalz GmbH's activities into its German subsidiary. Founded in 1907, Teltomalz has developed expertise about designing and manufacturing improvers for the bakery and pastry industries, which fits Eurogerm's current portfolio and ambition for the Northern & Eastern Europe markets.

This transaction will offer the EUROGERM Group strategic advantages for its development in Germany and Northern/Eastern Europe. The complementarity of the two players will help ensure efficient and responsive support for current and future customers in the wheat, flour, bread, pastry and catering industries.

TELTOMALZ GmbH is based in Teltow, close to Berlin. Operating out of the new organic and IFS certified (International Featured Standard) plant, TELTOMALZ GmbH manufactures malt-based products, premixes, mixes and ingredients for artisans and industrial customers in the bakery and pastry sectors.



Saco Foods Acquires Solo Foods

Saco Foods, a niche market-leading food products company, acquired Solo Foods, LLC. The acquisition adds another market-leading specialty baking ingredient brand to the Saco family of brands. Saco acquired Solo from Chicago-based custom food ingredient manufacturer, Sokol & Company. Shannon Pimmel, formerly Sokol & Company's National Sales Manager, has joined Saco to grow the Solo brand under Saco's ownership. Founded in 1925, Solo brings a 100-year legacy of time-honored specialty baking ingredient products to the Saco portfolio. Solo's products include cake & pastry fruit fillings, almond paste, and marzipan, which are primarily sold in the center-store baking aisle in traditional supermarkets and mass retailers in the U.S. This strategic move marks a significant step forward for Saco Foods, solidifying their commitment to excellence and providing high quality food products. This acquisition brings together two industry leaders combining Saco Foods fresh, innovative approach and expertise with Solo Foods rich heritage.

Corbion Sells Emulsifiers Business



Corbion, a leading global ingredient solutions provider, and Kingswood Capital Management, a middle-market private equity firm, have signed an agreement regarding the sale of Corbion's emulsifiers business. The divestment of Corbion's emulsifiers business follows

Corbion's Advance 2025 strategy, announced in March 2020, focusing on further growing a set of core competencies built around advanced expertise in fermentation that are essential to fulfilling the company's central purpose, to "preserve what matters." "Corbion takes immense pride in its heritage as a pioneer and leader in the emulsifier industry, and we appreciate the dedicated employees and loyal customers who contributed to this successful chapter in our history," said Andy Muller, President of Sustainable Food Solutions at Corbion.

Dawn Foods Acquires Royal Steensma

Global bakery manufacturer and ingredients supplier Dawn Foods proudly announces the acquisition of Royal Steensma, a renowned family-owned bakery ingredients manufacturing company headquartered in Leeuwarden, The Netherlands. Royal Steensma has a broad bakery product portfolio and specializes in fat-based coatings (Souplesse), almond and confectionary pastes, bakery mixes, fruit fillings as well as infused and candied fruits and decorations. Royal Steensma has been a leader in the bakery market for almost 185 years. The acquisition includes four manufacturing plants in The Netherlands, a manufacturing facility in Thailand, and continued involvement with the Food Innovation Academy (FIA) education center in The Netherlands. Additionally, all Royal Steensma employees are now valued team members of Dawn.



Agrain Partners With Daymer Ingredients As Exclusive Distributor In The UK

Agrain, a producers of sustainable and nutritious food ingredients solutions, has entered a strategic B2B partnership with Daymer Ingredients, a leading UK ingredient distribution company. This alliance marks a significant milestone for Agrain as it extends its footprint into the United Kingdom, focusing on ingredient distribution to the bread and baked goods industry. Agrain produces up-cycled ingredients designed to elevate the quality and sustainability of baked goods. Recognizing increasing consumer demand for health-conscious and eco-friendly alternatives, Agrain's collaboration with Daymer Ingredients aims to deliver cutting-edge, up-cycled ingredients to the UK. "We are thrilled to announce our partnership with Daymer Ingredients, a collaboration that underscores our commitment to transforming not only the bread and baked goods industry but the general food industry and expands our reach to the UK," says Aviaja Riemann-Andersen, Founder and CEO at Agrain.





UK Bakery Chain Greggs To Open Up To 160 Stores In 2024

UK bakery chain Greggs announces plans to open up to another 160 stores in the year ahead. The group opened a record 220 new shops over 2023, with 33 closures and 42 relocations leaving.

The company said cost pressures were continuing to ease back, with expectations for a “more stable cost base in the coming year”. “Wage inflation remains, although higher rates of pay across the economy will also provide support to consumer incomes,” according to the group. “We enter 2024 with plans to continue to invest in our shops and expand supply chain capacity,” said Roisin Currie, chief executive of Greggs.

Greggs is a British bakery chain. It specializes in savory products such as bakes, sausage rolls, sandwiches and sweet items including doughnuts and vanilla slices. It is headquartered in Newcastle upon Tyne, England and it is listed on the London Stock Exchange. Originally a high street chain, it has since entered the convenience and drive-thru markets.

Mars Announces USD237m Nature’s Bakery Facility In Salt Lake City

Mars has announced the establishment of a 31,500 sqm baking facility by Nature’s Bakery in Salt Lake City. Nature’s Bakery projects to add over 190 jobs to its Utah location and invest USD237m in its Utah facility.

“I am thrilled for our strategic expansion with the establishment of a cutting-edge baking facility in Salt Lake City,” shared Steve Gardiner, CEO of Nature’s Bakery. To accelerate the growth of its better-for-you snacking platform, Nature’s



Bakery has been part of the Mars family of companies since 2020. “This investment symbolizes our dedication to scaling our brands responsibly, upholding Mars’ pledge to be America’s prime destination for insurgent brands,” shared Juan Martin, Health & Wellness president at Mars, Incorporated. Nature’s Bakery’s new facility is scheduled to initiate operations in July 2025.

Kemin EMEA Introduces Olessence B, A Blend For Dry Bakery Products



Kemin Industries, a global ingredient manufacturer, recently launched OLESSENCE B Liquid, an innovative plant-extract blend that boosts flavor while preserving freshness in dry bakery products. In pursuit of maintaining high quality and extending the shelf life of bakery products, the combination of specific natural

flavors, including olive extract, has emerged as an ideal strategy. These ingredients, naturally containing bioactive compounds, provide a balanced flavor profile and, as a secondary benefit, contribute to the reduction of adverse effects of oxidation, while polyphenols and flavonoids act as radical scavengers, effectively delaying the oxidation process and development of rancidity. “OLESENCE B Liquid, which invites consumers to ‘savor the crunch, preserve the freshness’, represents a significant milestone in our commitment to providing natural and effective solutions for the food industry,” said Kelly De Vadder, Marketing Director, Kemin Food Technologies – EMEA.

Puratos UK Launches Sapore Sally, A Ready-To-Use Sourdough Made With Regeneratively-Farmed Flour

Puratos UK, a leading supplier of ingredients for bakery, patisserie and chocolate, has presented the latest innovation in its Sapore range of living and inactive sourdoughs, Sapore Sally, a living sourdough made with regeneratively farmed flour from UK-based Wildfarmed. It has been designed to help large bakeries to diversify their portfolios with locally-produced, sustainably-sourced sourdough products.

Sapore Sally has a creamy, slightly tangy taste and can be used to naturally enhance the flavor of a standard bread, or, when combined with a sourdough starter, adapts the flavor of a sourdough bread.

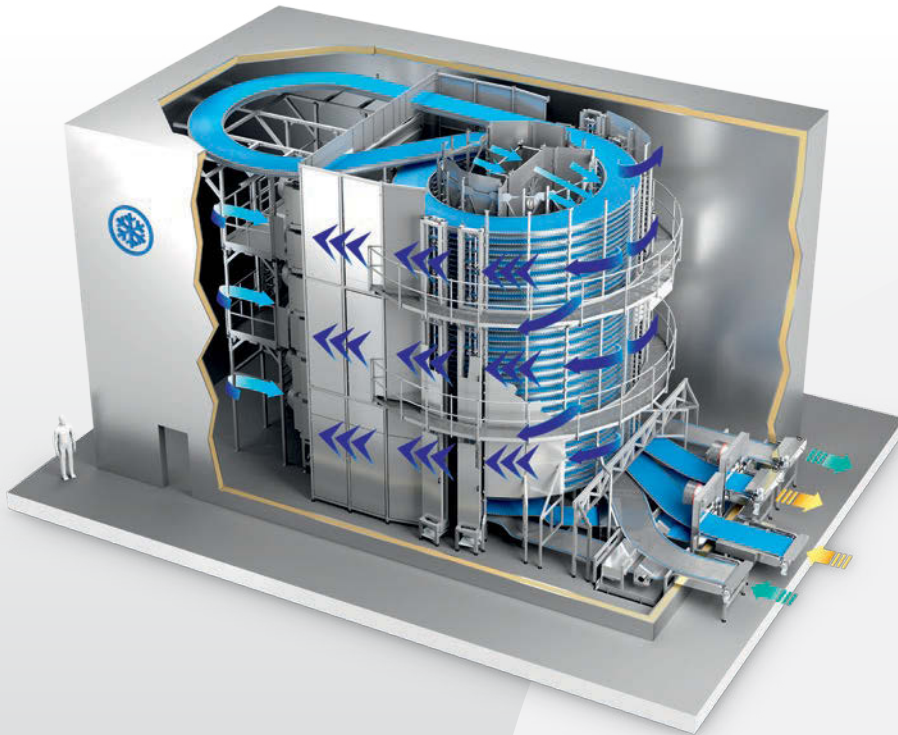








Puratos’s launch of Sapore Sally signals its first step in bringing locally-produced ingredients, made with regeneratively farmed flour, to UK bakers. It comes in the context of Britons becoming increasingly conscious about their food choices: 71% think that food made with local ingredients has a positive impact on the environment, according to the latest Taste Tomorrow research.

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-  Fast and ease maintenance
-  Space saving
-  Tailor made solutions
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Key Business

OUTLOOKS for 2024

The year 2023 has brought more international turmoil, supply chain disruption and historic inflation all over the globe, putting a lot of pressure on the baking industry. Concerns about the availability of raw materials, the cost of energy, transport capacity, regulations, labor shortage and purchasing power had companies and professionals worried and looking for solutions.

That is what we see in these interviews with top managers from the most important industry players: the industry fought back and invested in research and development to provide sustainable solutions that address these challenges.

For 2024, representatives of some of the most important equipment and ingredients manufacturing companies talk in unison about sustainability, automation, energy-saving technology, traceability and working for the customers, to make sure their access to good bakery products is unhindered by the setbacks of the world. None of the viewpoints shared with us is lacking in hope, an essential attribute for a long-term winning business. Conventional food production systems have enjoyed uninterrupted growth over the last few decades. While this trend is expected to continue in the short term, resource constraints may dampen expansion in the long term. Furthermore, the sector is increasingly ripe for disruption.

It is up to the bakers, transporters and retailers to find the right way to stay profitable and capitalize on the market opportunities that await them in 2024. •

By Tudor Vintiloiu & Jo Ilie



Bastian Hörmann, Global Marketing Director, Sweet Goods, Dairy, Specialized Nutrition, ADM



Lex van Houten, Regional Marketing Manager, AMF Bakery Systems



Niels E. Hower, Member of the Executive Board of Directors, BENEQ



Inge Demeyere, Managing Director Bakery, Ice Cream and Chocolate Confectionery, Cargill Food Solutions Europe

Felipe Ruano, President, ASEMAC



Tara Fischer, President, ECD



Tim Robb, Executive Vice President of Revenue, Goodway Technologies



Norbert Hübler, Global Sales Director & **Franz Sommerauer**, Head of Sales & Marketing, Authorized Signatory, Koenig Group



Gerard Muermans and **Roland Kals**, CEOs, Rademaker BV



Joe Pocevicus, Director, EMEA and APAC, Reading Bakery Systems

OUTLOOKS for 2024



Bastian Hörmann,

Global Marketing Director,
Sweet Goods, Dairy,
Specialized Nutrition, ADM

What are your expectations for 2024 keeping in mind the legacy of 2023, but also current challenges?

In reflection of 2023, where consumer preferences and health considerations played a pivotal role, the bakery sector is expected to continue its focus on innovation and adaptability. An emphasis on healthier eating habits and nutritional awareness are likely to persist, influencing formulation challenges in the industry. Significant development of formulations that align with health-conscious preferences is expected, including gluten-free, vegan and low-sugar options. The industry's commitment to innovation will be essential to staying ahead of consumer expectations. The Nutri-Score (NS) system is anticipated to have continued impact on baked goods and snacks, with manufacturers seeking ways to optimise formulations to achieve better scores. This could involve tweaking ingredient ratios, exploring new combinations or incorporating ingredient alternatives. Sugar reduction is also an area of focus. Bakery brands will continue to explore and implement formulations that reduce sugar content without compromising on taste and quality, including the integration of sweetening solutions derived from natural sources, such as stevia or agave. In addition to sweetener alternatives, functional ingredients like ancient grains, plant proteins and fibre, which can support tailored, nutrition-forward options, will resonate well with consumers. Ingredient sourcing is also crucial, with an emphasis on sustainable and locally sourced options. Bakeries might explore alternative flours, natural sweeteners, and plant-based ingredients to cater to the growing demand for diverse dietary choices. We anticipate the bakery industry in 2024 to be characterised by a delicate balance between tradition and innovation. We're supporting our customers through technologies and solutions that address these challenges head-on, delivering products that meet consumer expectations while also contributing to a healthier and more sustainable future.

Which are the most important drivers of change for your business in 2024? How do you plan to prepare for them?

As the world grapples with challenges associated with a growing population and the strains it puts on our natural resources, there is an increasing need to enact widespread industry improvements to how food is grown and produced.

Adopting practices like regenerative agriculture is an important part in addressing challenges throughout the entire food production chain, including reducing carbon emissions. Specifically, regenerative agriculture can minimize soil disturbance, maintain living roots year-round, continuously cover bare soil, maximize diversity by emphasising crops, soil microbes and pollinators, as well as responsibly manage inputs like fertilizers and pesticides. Implementing these holistic practices can help reduce greenhouse gas (GHG) emissions, increase soil carbon sequestration, improve water quality, promote biodiversity and enhance overall soil health.

At ADM, our commitment lies in advocating for the planet through sustainability initiatives across our global supply chain. We engage with farmers to integrate regenerative agriculture practices, as well as spearhead traceability efforts, promote regional and local capabilities and support the well-being of grower communities. For example, our European grown and sourced protein portfolios are designed to support egg replacement, protein enhancement and texture improvement in bakery items. Additionally, the bakery space has a distinctive growth opportunity in providing better-for-you baked goods with functional ingredients that address emerging and on-trend wellness focus areas, including a balanced gut microbiome. Added fibre is particularly important, and we're supporting bakery brands in incorporating prebiotic dietary fibre without sacrificing an exceptional sensory experience. Prebiotics, probiotics and postbiotics are highly sought-after across categories, as consumers may connect these ingredients to gut health, immune function and cognitive support. Our postbiotics and spore-forming probiotics represent the next frontier of personalised nutrition since these solutions can withstand harsh processing conditions, such as high-heat, that may come with certain bakery formulations. •



Lex van Houten,

Regional Marketing
Manager
AMF Bakery Systems

Considering the market volatility, the bottleneck of resources, the energy crisis, the increasing prices and workforce scarcity, what does this past year look like for your company when you draw the line?

Running a business requires being flexible and being able to look ahead, and that is what we learn and develop as an organisation. Supporting our customers no matter what and looking ahead to be prepared and innovate. We know that labour is/becomes scarce in coming years, so we automate many steps in bakery production for our customers, we make machines smarter and use AI to be in control of the process. These new developments result in trust and partnerships with the market and customers, to rise together as we say, and create these future-proof, profitable bakeries with them.

What are your expectations for next year, keeping in mind the legacy of 2023, but also the current challenges?

We strive for sustainable growth as a company, following our mission, vision, and company values. Better food, better lives is a very important part of our mission, and we want to do our part in making the world a bit better. Being part of the chain of preparing food for people on this planet, we make our machines more sustainable, work on our global footprint as a company and contribute to our teammates' well-being and the communities around us.

How do you estimate the market will evolve and what is your priority list for 2024?

We expect the market to continue to grow according to the potential we saw in 2023. After a couple of less predictive years in the market, we see the rise of new projects, investments and future plans for bakeries and food producers. Investments are picking up, replacements and upgrades are taking place, and our Customer Care department is at full speed in making our customers future proof with their investments.

Various markets in the bakery segment show CAGR of +4 or 5% growth in coming years, like soft bread and buns, pizza and flatbread and artisan bread.

Where did the growth opportunities come from and what is the most important lesson you have learned in recent times?

We see opportunities growing in emerging markets, where more investments are done in automation and completely new plants to feed the growing population in their countries. And we see that our long-valued customer relations pay off, resulting in growing results in our existing markets.

What do you consider to be the most valuable asset you have in 2024 as a company?

Our team 100%. Our people make sure this company delivers what it promises! Dedication, hard work, teamwork, smart solutions, customer focussed and always willing to help is what makes us unique. We call it the Markel style, being part of the Markel Food Group, we share these values with many companies in the group. We continue to invest in our team and getting the best people on board worldwide, so at every continent we keep delivering the best customer care and the best solutions for bakeries and food producers.

As part of your growth strategy, how do you prioritize your investments versus your R&D efforts?

AMF Bakery Systems invests in people, R&D and in many new opportunities that fit our mission and strategy long term. A perfect example is the development of the world's first 100% hydrogen tunnel oven for bakeries and food producers. We are committed to a

sustainable future and believe our customers will do the same. Lowering CO2 emissions, moving away from natural gas, and still being able to bake beautiful, crusty and tasteful bakery products is guaranteed with this type of oven. But also, electrical industry ovens and hybrid models are possible. Value added services like our Sustainable Oven Service compliment the hardware, to use ovens optimal with AI tooling, and get recommendations to save up to 20% on gas use immediately.

What was unexpected in 2023 and how did it impact your business?

Supply chains were still impacted by the (past) Covid years, raw material prices went up, container prices are still high and of course the situation in Ukraine has an enormous impact on business on the European continent. We truly hope this settles down quickly, and we can help build up Ukraine again, by supporting bakeries producing food for the inhabitants of the country.

Which are the most important drivers of change for your business in 2024? How do you plan to prepare for them?

Digitalization, global footprint, and sustainability are big drivers of change. The bakery of the future, our vision for the 'lights-out bakery,' is one where automation is so perfectly organized by AMF, that the lights can be switched out, and operations still run fluently. That is our dot on the horizon, and we work on that every day, by improving products, services, and new developments.

What would you like to see happening in 2024 for your stakeholders and business environment (in terms of policy, regulations, and market) for your business to thrive more?

We hope that the world will take necessary steps to become more sustainable and give this planet to next generations in good shape. This means also for the bakery value chain; we must do our part. If we decide to invest in Hydrogen and Electric baking, we are ready and will support the market to make these changes. Governmental policy / influence, but also their help in subsidizing these initiatives will increase the speed of this transition in our opinion. •

OUTLOOKS for 2024



Felipe Ruano, President of the Spanish Association of the Bakery, Pastry and Confectionery Industry (ASEMAC)

Considering the market volatility, the bottleneck of resources, the energy crisis, the increasing prices and workforce scarcity, what does this past year look like for your company when you draw the line?

The year 2023 has not been easy, especially due to the high inflation that has affected the food sector in Spain. The companies that are part of ASEMAC have made great efforts to try to minimize its impact on the final consumer. All in all, we have managed to maintain the production of frozen doughs for bakery throughout 2023 and we have increased production of pastries, something that we consider a success.

What are your expectations for next year, keeping in mind the legacy of 2023, but also the current challenges?

It is very difficult to make a reliable estimate, considering the geopolitical instability and the fact that, increasingly, we are faced with consumption factors that we can hardly control. However, we hope that 2024 will be a year of consolidation for our industries in which, little by little, investments in R&D that had to slow down in previous years will be recovered.

How do you estimate the market will evolve and what is your priority list for 2024?

For years now, the consumption of bakery products in Spain has been declining, while the pastry segment is now growing. Our priority is to work to reverse the trend in bread consumption and consolidate the growth of the pastry segment with products that adapt to consumer needs.

Where did the growth opportunities come from and what is the most important lesson you have learned in recent times?

Our industry, like many others in Spain, is closely linked to the evolution of tourism, whether internal or external. Last year was a very good year for tourism in our country, something that has helped our companies continue to grow.

As part of your growth strategy, how do you prioritize your investments versus your R&D efforts?

In recent years, many of our companies' R&D efforts have been directed towards adapting

products to national regulations regarding the reduction of salt, fats and sugar content. As I mentioned previously, investment was temporarily halted due to the pandemic caused by COVID19. However, in a context of relative normality, we expect investments to increase again to meet new consumer demands, which will require modifications in many of our production plants to supply the entire country.

What was unexpected in 2023 and how did it impact your business?

What made it worse was the inflation registered in 2023, due to the pandemic and the war in Ukraine. In fact, stability is something that business owners especially appreciate, to plan the coming year. We hope that 2024 will bring us a lot of stability.

Which are the most important drivers of change for your business in 2024? How do you plan to prepare for them?

The main changes undertaken in our companies in recent years have aimed to be more sustainable. Not only from an environmental point of view, but also from an economic and social perspective. Thus, significant investments have been made to implement and certify the use of renewable energies in production plants, as well as in the digitalization of internal processes, the renewal of fleets powered by clean energies or the commitment to local productions. All of this will be reflected in a sectoral sustainability report that we will present very soon.

What would you like to see happening in 2024 for your stakeholders and business environment (in terms of policy, regulations, and market) in order for your business to thrive more?

What we demand from administrations is a stable and reasonable legislative environment in its application deadlines, which allows us to plan our actions in a sustainable manner. In that regard, we must remember that the food sector is essential. The pertinent decisions must be made so as not to depend on external productions. Finally, it is good to remember that a changing and complex regulatory environment for companies has, in the long term, a negative effect on the final consumer, since in many cases its implementation involves an increase in costs that, ultimately, must be applied to the next link of the chain. •



Niels E. Hower,
Member of the
Executive Board of
Directors at BENE0

Considering the market volatility, the bottleneck of resources, the energy crisis, the increasing prices and workforce scarcity, what does this past year look like for your company when you draw the line?

Like most of the industry affected by the macroeconomic situation, it was not a record year for BENE0. However, we did achieve some important milestones. These included the beginning of construction on our EUR50m new faba bean processing plant, which will strengthen the company's plant-based protein portfolio. Also, BENE0 launched barley beta-glucans which offer unique health benefits including impacts on heart health and blood sugar management and can be used in a wide range of bakery applications such as cakes, muffins, bread, and biscuits.

What are your expectations for next year, keeping in mind the legacy of 2023, but also the current challenges?

We believe that demand will bounce back in the coming year and as such, we are putting all our focus on regaining market share. A growth driver for us will be our plant-based protein business. We have a unique product range thanks to the acquisition of Meatless, combined with the start of production of our faba bean concentrates and flours towards the end of the year. BENE0's faba bean protein concentrate shows high solubility and very good emulsifying properties. It is therefore ideal for use in a wide range of bakery products. Faba bean starch-rich flour, being naturally high in protein, can help boost the protein content in applications such as cereal bars, pasta, snacks, or baked goods.

With the macroeconomic situation improving and our ingredients continuing to meet the demands of key industry trends, we are approaching 2024 with confidence. Making plant-based protein more convenient is one of those trends and, thanks to our Meatless portfolio, we can help bakers

create meat-free pies and pastries with our plant-based chicken chunks. Hybrid products that combine meat and plant-based ingredients are also possible, building a bridge to the plant-based trend for those who are not ready to give up meat entirely. Digestive wellness and better and fewer carbs are two other top trends for 2024 and we are well placed to help producers make the most of these. As the only plant-based prebiotics, inulin and oligofructose belong to the very few proven prebiotics according to ISAPP (International Scientific Association for Probiotics and Prebiotics) and can help bakers integrate gut health claims into their products. Also, more and more is being discovered about the benefits of a healthy gut, with a recent study by Jackson et al demonstrating that oligofructose even has a part to play in contributing to mood improvement. Both prebiotic chicory root fibre and our new wholegrain barley flour with beta-glucans have also been shown to support more balanced blood sugar management, again putting our ingredients in a strong position to meet this year's consumer trends for bakers.

How do you estimate the market will evolve and what is your priority list for 2024?

Building our plant-based proteins business remains a focus for us, particularly following the acquisition of Meatless and the construction of the faba bean production facility. We want to become a world-class alternative protein texturiser and formulator, pioneering innovative applications. With the Meatless acquisition and the faba bean production site, we are in possession of a locally grown raw material that delivers more benefits to producers than pea protein and a unique, low energy consumption texturing technique that enables the creation of bean protein concentrate and starch rich flour for protein-enrichment and texture improvement in (gluten-free) bakery and cereals. •

OUTLOOKS for 2024



Inge Demeyere,
Managing Director Bakery,
Ice Cream and Chocolate
Confectionery at Cargill Food
Solutions Europe

Considering the market volatility, the bottleneck of resources, the energy crisis, the increasing prices and workforce scarcity, what does this past year look like for your company when you draw the line?

Having been around for over 150 years we are certainly no strangers to turbulent times. Our rich history also provides us with the tools and expertise needed to track global macro trends and co-create innovative solutions to meet them. That's why we invest in innovation and co-creation, helping our customers remain competitive in a volatile marketplace.

What are your expectations for next year, keeping in mind the legacy of 2023, but also the current challenges?

Our customers can depend on our insight-led innovation to create nutritious and tasty products that contribute to happier, healthier lives. One great example can be found in the development of plant-based and healthier solutions to tap into macro trends.

How do you estimate the market will evolve and what is your priority list for 2024?

We're making investments in these growth areas accordingly. Our Gerkens Sweety Cocoa Powder range is one great example of how we're making it possible for chocolate beverage producers to hit the sweet spot for consumers. These cocoa powders enable up to 30% sugar reduction in the end application while providing a nice chocolatey taste that is loved by consumers. Additionally, we're finding that 'natural ingredients' is the most appealing claim on packaging for cocoa and chocolate products, with 70% of EMEA consumers considering the lack of additional sweeteners to be most important on the ingredient list. As we look to the future, we plan to add 60% capacity to our chocolate coatings & fillings plant in Deventer, the Netherlands.

Where did the growth opportunities come from and what is the most important lesson you have learned in recent times?

An important lesson learned in 2023 was how quickly supply chains can be disrupted by political and economic issues, and the need to ensure everything in your supply chain is secure and sustainable to weather those storms. For us, this ties in with our growth plan to differentiate with sustainability, as we commit to doing what's

right at every step of the value chain and helping our customers grow their business, advance their sustainability goals, and strengthen their credibility.

As part of your growth strategy, how do you prioritize your investments versus your R&D efforts?

Innovation is hard work, so we focus our investment on the tools that make it easier and faster. This includes both digital tools and connectivity between people and the actual physical spaces where we can work and co-create. For instance, Cargill's European R&D centre in Vilvoorde houses some 180 scientists and technologists with state-of-the-art pilot plants.

What was unexpected in 2023 and how did it impact your business?

There were a number of political and socioeconomic conflicts and tensions that were both unexpected and impactful on the global food supply chain, but we are well positioned to help our customers weather these upheavals. We are anticipating that market volatility to become the new normal in the years to come.

Which are the most important drivers of change for your business in 2024? How do you plan to prepare for them?

Our focus is on looking at what consumers need and what the planet needs. Whereas each category will have its own needs and priorities, our business focus over the coming year is making connections across our portfolio to make it even easier for our customers to do business with us.

What would you like to see happening in 2024 for your stakeholders and business environment (in terms of policy, regulations, and market) in order for your business to thrive more?

Most of the industry will be calling for greater clarity on the sustainability strategy and regulations that are coming into force here in Europe. We support the European Commission's regulation on deforestation-free products and share the European Union's vision of combating deforestation and forest degradation. We look forward to seeing how the regulations are turned into reality in 2024. In addition, we'd like to see less volatility in the market with less expensive raw materials so that the consumer impact is minimal. •



Tara Fischer,
President, ECD

Considering the market volatility, the bottleneck of resources, the energy crisis, the increasing prices and workforce scarcity, what does this past year look like for your company when you draw the line?

Global inflation pressures have impacted nearly all market sectors and baking is no exception. Price-conscious consumers make cost-benefit decisions, which has prompted bakers to reconsider packaging strategies, varieties, and other aspects of their baked goods portfolio as inflation has persisted. Operationally, production efficiency and higher yields also help to reduce cost, which is ECD’s sweet spot. Consequently, we have seen an uptick in interest and orders for sensors and thermal profiling products as bakers look to use precision tools to optimize production. Internally, ECD has adjusted to market pressures as most companies have, but we had a solid year in 2023 and expect 2024 to track the 5% to 7% growth anticipated in the baking market.

What are your expectations and priorities for 2024? How do you see the market evolving?

ECD has seen more bakeries – particularly large and mid-tier companies – embrace the science of baking and the need for precision verification of baking systems and baked goods. Thermal profiling is the only way to scientifically assess oven health and efficiency, baked product thermal transformation, and food

safety compliance. Our M.O.L.E. thermal profilers, along with OvenBALANCER, BreadOMETER, and CakeOMETER sensors, are scalable tools that enable the measurement of critical data to yield a more robust, repeatable baking process. And, while there is definitely an art to baking, you can’t argue with proven science and its results. Data acquisition is vital for quality assurance, and I think the bakeries that don’t already employ these simple and effective technologies will soon begin to do so for their competitive well-being. In line with this, ECD acted on our customers’ interest in an intuitive thermal profiler, and we developed the touchscreen M.O.L.E. EV6. As bakers increasingly integrate scientific measurement methods into their operations, they will find thermal profiling is more seamless and easier to manage than ever before.

Where did the growth opportunities come from and what is the most important lesson you have learned in recent times?

Much of ECD’s growth has come from the realization that data and its proper analysis and application can enable a higher-quality, higher-yield result. The less scrap a bakery has, the more consistent its quality and shelf-life, and the more efficiently its ovens run, the healthier the business. Thermal profiling was once viewed as something the big baking companies did and was a nice-to-have, but now it is becoming standard practice for bakeries of all sizes, and ECD is proud to be part of this evolution. Comparable historical data electronically recorded beats a pen and clipboard every time!

What do you consider to be the most valuable asset you have in 2024 as a company?

Our team, its expertise, our loyal customers, and our proprietary technologies are ECD’s most valuable assets.

As part of your growth strategy, how do you prioritize your investments versus your R&D efforts?

R&D investments are prioritized by

assessing customer needs, market viability, and the unique value ECD can deliver. This process and our in-depth technology roadmap planning have served us well over our 60 years in business.

What was unexpected in 2023 and how did it impact your business?

Supply chain challenges and parts sourcing – particularly at the start of 2023 – were somewhat unexpected. We had anticipated that these would ease sooner rather than later, but they persisted well beyond the first quarter. With inventory fears, many companies over-purchased stock, leading to parts shortages. While this was obviously unwelcome, ECD enlisted expert support to help us navigate the challenges, locate stock, and deliver on customer product commitments. Fortunately, the supply issues have mostly resolved, but we learned a lot from the experience. For example, leveraging 3D printing helped us with NPI evaluation. We see this as a way forward for in-house parts manufacture in some cases, as it offers incredible quality and inventory control, so we have invested in a new 3D printing platform.

Which are the most important drivers of change for your business in 2024? How do you plan to prepare for them?

ECD sees digitalization as vital to our business going forward. Over the last two years, we have implemented new software systems for all aspects of our organization – from engineering to finance to sales.

What would you like to see happening in 2024 for your stakeholders and business environment (in terms of policy, regulations, and market) in order for your business to thrive more?

Our global customers must navigate numerous food safety and quality policies and regulations. ECD’s job is to make that compliance as easy as possible by enabling simple data acquisition, offering tools like our Kill Step Calculator, and supporting product traceability requirements. Our business thrives when our customers can do what they do best – bake with confidence! •

OUTLOOKS for 2024



Considering the market volatility, the bottleneck of resources, the energy crisis, the increasing prices and workforce scarcity, what does this past year look like for your company when you draw the line?

The line is positive in turns of the success we've had across the globe. We've attempted to mitigate these challenges by working closely with supply chain partners, and customers to understand their needs, which in turn allow us to plan better, and continue to deliver the quality and service our customers expect. The dynamic of the bakery, snack, and packaged food market is changing, and the solutions we provide add immediate value to our customers production lines, helping them produce better products. So, even with headwinds, the market has grown, and long with that, the need for innovative cleaning and sanitation solutions.

What are your expectations for next year, keeping in mind the legacy of 2023, but also the current challenges?

We are very positive about the upcoming year. The market continues to shift to more convenient packaged foods, and we are working with our customers to make sure we have the solutions they need to meet volume, and cleanliness demands.

How do you estimate the market will evolve and what is your priority list for 2024?

Continued focus on meeting the needs of our customers for automated solutions for cleaning, and sanitation. That not only includes continued development on our dry steam generation systems, and associated solutions, but also on specific technologies for keeping production environments clean. As our customers across the globe expand their offering, and grow their brands, keeping their products safe is their number one focus, and ours too.

Where did the growth opportunities come from and what is the most important lesson you have learned in recent times?

Global trends in consumer-packaged goods and more convenience foods have really been a large driver of the growth our customers see in the bakery and snack markets. Those trends aren't going anywhere. Additionally, oversight in cleanliness, and sanitation has become more, and more of a focus, which is in line with the solutions we provide.

What do you consider to be the most valuable asset you have in 2024 as a company?

Our people! Goodway Technologies boasts some of the most passionate and dedicated team members in the world. We continue to build on our fundamentals of providing a fantastic, and rewarding workplace environment where employees make a big difference day in and day out.

As part of your growth strategy, how do you prioritize your investments versus your R&D efforts?

Our legacy is our quality and innovation. R&D investments play a major part. Working in conjunction with our customers, and other industry partners, allows us to streamline our innovation investments, and bring them to market quickly. This leaves plenty of resources to grow a strong business, and engaging workplace.

What was unexpected in 2023 and how did it impact your business?

The continued stubbornness in the supply chain, and lingering cost issues continued to be a challenge in 2023. However, working with our suppliers, and customers so that all parties involved understood the challenges, allowed us to overcome them with great success. In the end, partnership across the board builds trust.

Which are the most important drivers of change for your business in 2024? How do you plan to prepare for them?

Continuing global trends in packaged foods, and better cleaning and sanitation programs are driving the example of business opportunities across the globe. Making sure that customer have access to our solutions, and the service they expect is our utmost focus, and goal. We look forward to the challenge!

What would you like to see happening in 2024 for your stakeholders and business environment (in terms of policy, regulations, and market) in order for your business to thrive more?

Continued oversight of food production environments is very important. As opportunities in the convenience, and packaged foods marketplace continue to grow quickly, quality processes can sometimes be weakened by the need to be "first to market". This is concerning for everyone, as it impacts everyone negatively. •



Tim Robb,
Executive Vice President
of Revenue, Goodway
Technologies



Norbert Hübler,

Global Sales Director &

Franz Sommerauer,

Head of Sales & Marketing,

Authorized Signatory,

Koenig Group

Considering the market volatility, the bottleneck of resources, the energy crisis, the increasing prices and workforce scarcity, what does this past year look like for your company when you draw the line?

Hübler:

The last year was difficult for us to plan, as already budgeted projects were postponed due to increases in energy costs and uncertainty in the field of subsidies and interest costs. Customers were reluctant to make decisions based on the uncertain situation on the markets.

Nevertheless, it was a very good year for Koenig as there was a significant demand for high-quality equipment. Medium-sized companies have invested due to lack of employees and have therefore automated their production.

The shortage of skilled workers will be a key factor for investments in the baking industry and Koenig is very well positioned in this area. We took the right steps internally at an early stage to respond to evolving market demands.

What are your expectations for next year, keeping in mind the legacy of 2023, but also the current challenges?

Sommerauer:

The market is still very turbulent, but we see a clear tendency for the investment backlog to clear. The signs are promising in terms of stable energy costs, lower interest rates and a general improvement on global markets.

We are prepared for a more stable situation and higher willingness to invest.

How do you estimate the market will evolve and what is your priority list for 2024?

Hübler:

For 2024, we will focus on solution thinking for the customer, supporting bakeries in solving problems so that they can successfully do business in the market and building long-lasting partnerships with customers.

As for market trends, we will focus on simplification in line operation, hygiene and energy saving.

In the industrial field, we perceive a demand for investment to compensate lack of employees and respond to market requirements in the growing bread sector. This means for us that we will increasingly position ourselves as a comprehensive solution provider.

It is about “growing with Koenig” – we are providing solutions so that the customer has potential for growth and for continuous adaptation of their solutions to the market requirements.

This is why we will revise our artisan product portfolio with focusing on saving resources and modularization to meet the increased requirements regarding differentiated products.

We will also increasingly focus on dough sheeting and vacuum cooling technology, as we see great potential in the artisan sector.

Sommerauer:

We appreciated the good and cooperative, long-standing dealer network that maintains close contact with customers and offers service in the respective regions.

Our vision to manufacture high-quality baking equipment to support bakeries in

their craft proved us right in the recent turbulent and unstable years. This vision of our founder Mr. Koenig was the basis for our success and will be in the future. We have a very high level of vertical integration with several production plants in Europe. As a result, we offer a high availability of spare parts and can react better to market fluctuations.

What do you consider to be the most valuable asset you have in 2024 as a company?

Hübler:

It is our team without a doubt. The Koenig family is our most valuable asset.

What was unexpected in 2023 and how did it impact your business?

Sommerauer:

Projects that had already been planned were postponed due to the global situation. This was a challenge for our internal planning of resources.

The iba trade show in Munich was a positive accent for the entire bakery industry and a sign that the industry is doing well and is following an upward trend.

Which are the most important drivers of change for your business in 2024? How do you plan to prepare for them?

Hübler:

We will be moving from machine thinking to solution thinking and will concentrate on a holistic approach to be even more of a partner for the customer. This means internal changes and adaptations for the entire Koenig Group to provide the best possible customer care.

What would you like to see happening in 2024 for your stakeholders and business environment (in terms of policy, regulations, and market) in order for your business to thrive more?

Sommerauer:

For companies to thrive and succeed, we all need more security in planning and a more stable economic and political environment on a global basis. Companies will succeed in focusing on quality rather than quantity and long-term thinking. •

OUTLOOKS for 2024



Gerard Muermans
and **Roland Kals,**
CEOs, Rademaker BV

Considering the market volatility, the bottleneck of resources, the energy crisis, the increasing prices and workforce scarcity, what does this past year look like for your company when you draw the line?

The year 2023 indeed presented its challenges. While direct supply chain disruptions were mostly manageable due to actions taken in previous years, customer-initiated delays, such as those resulting from "buildings not ready" or unexpected time-consuming local government procedures, posed challenges for (re) planning installations. The energy crisis appeared to be less of an issue for most of our customers as energy prices dropped again and stabilized. Concerning workforce issues, this has driven many customers to invest in automated production lines, in which Rademaker is a market leader.

What are your expectations for next year, keeping in mind the legacy of 2023, but also the current challenges?

The outlook for 2024 is positive, as the scarcity of labor continues to drive customers towards automated solutions provided by Rademaker. Investments made in the previous year should have prepared the organization to meet this high demand.

How do you estimate the market will evolve and what is your priority list for 2024?

We expect a positive development compared to 2023, although high interest rates might lead to cautious and therefore lengthy considerations in investments, particularly in certain geographical areas.

Where did the growth opportunities come from and what is the most important lesson you have learned in recent times?

Growth is seen over the entire line of Rademaker Products, both in the highly industrial segment as in the mid-range/semi-industrial segment. Geographical difference will obviously occur. Our most important lesson is understanding the significance of staying connected and maintaining faith, especially during difficult and uncertain times.

What do you consider to be the most valuable asset you have in 2024 as a company?

The Rademaker employees are our most valuable asset. They cultivate relationships with our customers, enabling us to make a difference in the market together.

As part of your growth strategy, how do you prioritize your investments versus your R&D efforts?

To meet market expectations, we focus on our existing organizational and development roadmaps. We are convinced that this focus, combined with multiple customer partnerships, will yield optimal and sustainable intrinsic growth of our company.

What was unexpected in 2023 and how did it impact your business?

Several delays from customer projects caused by external factors. As a result, we had to be very flexible in finding solutions.

Which are the most important drivers of change for your business in 2024? How do you plan to prepare for them?

The current, and even more so, future scarcity of materials will remain an important factor in our overall business approach. This scarcity is also a main driver behind our ongoing actions to achieve our sustainability goals. In addition to this, the increasing importance of data and AI is driving various development projects. A key aspect of this strategy is to continue building strategic partnerships on these topics with both suppliers and customers.

What would you like to see happening in 2024 for your stakeholders and business environment (in terms of policy, regulations, and market) in order for your business to thrive more?

We sincerely hope that the wars in various parts of the world will stop as soon as possible. Not only because of the negative effects they have on our business but also because the suffering of so many people worldwide should come to an end as soon as possible. •



Joe Pocevicus,
Director, EMEA and APAC,
Reading Bakery Systems

Considering the market volatility, the bottleneck of resources, the energy crisis, the increasing prices and workforce scarcity, what does this past year look like for your company when you draw the line?

This past year, RBS focused on innovation, specifically in sustainability and automation. This positioned us well to effectively navigate the challenging market conditions. Customer demand for and accelerated adoption of energy efficient, flexible, and labor-saving systems.

What are your expectations for next year, keeping in mind the legacy of 2023, but also the current challenges?

We are cautiously optimistic for 2024. While some important external factors have stabilized, like materials pricing and supply chain consistency, there are several to keep an eye on, such as consumer inflation, rising interest rates or military conflicts. Internally, we'll continue to focus on efficiency through lean manufacturing and other continuous improvement initiatives.

How do you estimate the market will evolve and what is your priority list for 2024?

Customers will continue seeking more automation and sustainable solutions. This isn't just energy efficiency, but easy maintenance and operation, and system flexibility to make many products as well as automation for operational improvements and labor savings.

What do you consider to be the most valuable asset you have in 2024 as a company?

At RBS, our people are our most

valuable asset. None of what we do would be possible without such a great team. We focus on empowering our people to best serve our customers which preserves our culture and drives sustainable company growth.

As part of your growth strategy, how do you prioritize your investments versus your R&D efforts?

Our growth and success will come from prioritizing product innovation, sustainable baking systems, and our commitment to customer partnership. We have recently expanded our R&D team to help push these initiatives forward.

What was unexpected in 2023 and how did it impact your business?

Not unexpected, but still a bittersweet transition, in January 2024 we said goodbye to Joe Zaleski, longtime RBS president, and welcomed another longtime RBS teammate as our new president. This transition offered the opportunity to reallocate assets to position us for continued growth and success.

Which are the most important drivers of change for your business in 2024? How do you plan to prepare for them?

Our R&D and product innovation is focused on all facets of sustainable bakery systems and making the baking process more efficient for our customers. This includes, electric and hybrid fuel ovens, more intelligent system designs for easier operation and maintenance, and automation that will reduce labor needs while increasing throughput. This is our commitment to partnership for the foreseeable future. •

X-ray Inspection, **the Key to Less Recalls**

X-ray inspection systems increase food safety and offers protection against expensive product recalls.

By Minebea Intec



The use of X-ray inspection systems in the food industry has increased significantly in recent years. These systems have proven to be a worthwhile investment in product safety, integrity and quality. Minebea Intec, a leading global manufacturer of industrial weighing and inspection technologies, offers innovative x-ray systems to ensure the highest safety and quality standards in food production. Between the rhythmic whirring of machines, the rattling of pack-aging and the tantalizing aroma of freshly produced delicacies, X-ray inspection systems occupy an important

place in many production halls around the world. X-ray inspection systems not only recognise products that are contaminated with metal, glass, rubber, stones, plastic parts or bone splinters, they also enable inline quality checks such as weight determination, counting of components, detection of miss-ing or defective products, fill level control and checking the integrity of closures. As part of the HACCP concept (Hazard Analysis and Critical Control Points), they help to fulfill the increasing requirements of consumers, authorities and protect manufacturing companies from costly and brand-damaging product recalls.

X-RAY INSPECTION: HOW DOES IT WORK?

X-ray machines in the food industry work in much the same way as X-ray machines at airports check luggage for security reasons. The product runs on a conveyor belt at a constant speed through the X-ray beam. As the product continues to move, a new image line is generated at regular intervals (e.g. every 0.8 mm). Once the product has been fully recorded, the greyscale image generated is analyzed and inspected for foreign objects.

“X-ray inspection systems recognise contaminated products by the fact that foreign bodies such as metal absorb X-rays more than the actual food product,” says Liang Mengqi, Global Product Manager at Minebea Intec. “Hence, the success of foreign body detection depends on the density of the foreign bodies. For example, Minebea Intec X-ray machine could detect 2 mm metal wire inside of a yogurt where the conventional metal detector has no chance. Because the metal detector will be stopped due to the aluminum foil from the yogurt packaging.

HOW DO YOU SELECT THE PROPER X-RAY SYSTEM?

Minebea Intec offers a large portfolio of X-ray systems for the inspection of packaged products. Typical applications include cartons, boxes, bags, pouches, trays and portion packs, which can contain a wide variety of dry or liquid foods. To select a suitable X-ray system for the production, the product and its orientation need to be considered.

Systems with top-mounted X-ray generators are the most common in the food industry, where the X-ray beam hits the product directly from above. These inspection systems are usually installed at the end of a production line and inspect the packaged products. For this purpose, the packs are positioned flat on the belt so that the X-ray beam could pass through as less pack thickness as possible, which attributes to the higher detection sensitivity. The Dylight and Dymond models have been specially developed for these applications. They are characterized by a hygienic design and high detection sensitivity with low power consumption. Systems with a side-mounted X-ray generator, where the X-ray beam reaches the conveyor belt from the side, are often used for the upright products such as a jar of baby food. In this case too, the product must be aligned so that it passes the detector system with the upright side facing the X-ray beam. For example, the Dymond S as a sideshooter X-ray, combines high detection sensitivity with low power consumption. The unit is optionally available with a so-called chicane belt. Ideal for those situations where only very limited space is available. Dymond D is a dual-beam X-ray inspection system that produces two X-ray images at a 90° angle. Whether it's tins, Tetra Paks or glass jars, multi-sided inspection provides maximum safety thus opening up a wealth of possibilities for manufacturers in product design.

SPECIAL DESIGNS OF X-RAY INSPECTION

Minebea Intec recently launched the Dypipe X-ray inspection system for viscous and liquid products.

“The Dypipe is equipped with an innovative test specimen insertion system that enables the test specimens to be inspected during operation,” says Liang Mengqi. “This means that manufacturing companies can be sure at all times that their production processes are running smoothly and safely.” In order to meet the high hygiene requirements for meat applications, the Dypipe is equipped with an easy-to-open separator that was specially developed for this purpose. This system guarantees excellent results and gives the certainty of producing high-quality food.

Another special design of X-ray inspection systems is the Dymond Bulk. It guarantees precise X-ray inspection of bulk materials in the food industry. Foreign bodies such as stones or metal are consistently detected and removed from the material flow to protect both products and machines. Dymond Bulk has outstanding detection performance for raw materials such as vegetables, nuts, dried fruits or cereals: an optional multi-segment separator with four segments also guarantees the targeted and cost-effective elimination of foreign bodies from the product stream.

EVERYTHING FROM A SINGLE SOURCE

The sophisticated X-ray inspection systems that optimize production lines are just one part of Minebea Intec's comprehensive product portfolio. Whether checkweighers with high-speed function, robust load cells for your container or silo weighing, high-precision industrial scales or intuitive software solutions: Minebea Intec supports its customers throughout the entire project phase with customized solutions. So that customers' freshly produced food not only smells good, but can also be consumed without hesitation. •



Dypipe 1588



PIC_Dymond 80



Rolling in Dough: **How Precision Sheeting Keeps Bakeries Ahead of the Curve**

Sheeting and laminating dough in industrial-scale bakery operations serves several purposes. The controlled reduction of dough thickness through successive rolling stages, interspersed with layers of fat or other ingredients, produces a distinct flakiness and lightness, which is a desirable trait in a myriad of baked goods such as croissants, puff pastries, and laminated breads.

By [Tudor Vintiloiu](#)

The process also ensures consistency in product quality and texture, essential for meeting consumer expectations and fostering brand loyalty. By mechanizing the process, bakeries can achieve reproducibility at scale, minimizing variations in dough thickness and fat distribution.

Moreover, automated equipment, ranging from dough sheeters to laminators, enables high-speed processing while maintaining precise control over critical parameters such as dough thickness and layering. In artisan-style production, however, the emphasis shifts towards preserving traditional techniques and artisanal craftsmanship. While industrial-scale bakeries

may opt for fully automated systems, artisanal bakers often rely on manual skill and expertise to execute the sheeting and laminating process by hand. This approach allows for greater customization and creativity, resulting in unique pastry creations cherished by discerning consumers.

Large-scale production presents its share of challenges, nonetheless. Managing huge volumes of dough while maintaining consistent quality demands sophisticated equipment and robust process controls. Factors such as dough elasticity, temperature, and humidity can influence the outcome, necessitating careful monitoring and adjustments throughout production.

Furthermore, achieving uniform layering and fat



distribution across the dough sheet requires precision engineering and adherence to strict tolerances. Any deviations can compromise product integrity and result in suboptimal baked goods. Hence, bakery equipment manufacturers play a pivotal role in developing advanced technologies tailored to the needs of industrial-scale sheeting and laminating.

FLEXIBILITY VS. YIELD

According to equipment manufacturer Rademaker, a proper lamination process results in a perfectly flat and homogeneous dough sheet with evenly spaced fat layers. This enables high quality production of croissants & pastries with the ultimate weight accuracy and highly reproducible

product shape & size. "The Rademaker laminators are designed to deliver the best possible quality dough sheet for industrial production facilities running at the highest output," the company's experts point out.

Various laminating methods can be applied in the Rademaker sheeting and laminating lines. From lapping to cut & stack or simply folding, everything is possible to cater the specific needs of the end user. "With this wide range of applications, Rademaker can live up to the requirements for any number of layers. Moreover, it enables line configurations with the necessary layout to fit in an existing production facility. Finally, also any required dough sheet width and final thickness can be arranged by configuring the various production modules in a custom set-up," Rademaker adds.

RADINI

by Rademaker

A successful combination of craftsmanship and automation

INNOVATIVE PRODUCTION SOLUTIONS FOR

☰ LAMINATED DOUGH

🌀 PASTRY

🥞 CROISSANT

🍩 DONUTS

🍞 BREAD

Pastry production 250 - 1.000 kg dough per hour

- ✓ Consistent and reproducible products
- ✓ Unlimited product variety
- ✓ Easy operation



RADINI
YOUTUBE
CHANNEL



Contact us! office@rademaker.nl - www.rademaker.com/radini



Due to the modular configuration possibilities of the Rademaker sheeting & lamination production lines, it is possible to create a wide range of solutions. According to the company, from the smallest block processor up to an extremely high capacity and fully automatic laminator, any solution can be configured based on the same high quality components. “The resulting production lines are known for durability and robustness, which is resulting in world class efficiency. On top of that, any combination with croissant & pastry make-up line is possible, creating the optimal flexibility for a huge variety of production situations.”

THE RADINI SYSTEM

The Radini Laminator is a compact, modular dough sheeting line designed specifically to meet the needs of bakeries, with a capacity ranging from 250 to 1000 kg of pastry. Important for industrial bakeries in the middle segment is that they can adapt to the continuous changing market requirements.

“With the modular Radini design we can configure a line based on the actual bakers needs but also, we are able to change the configuration by adding modules for future needs. Integration and installation of future additions and upgrades can be realized with minimum down time and production interference. Modular units include its own hardware control box, and the software automatically recognizes a new configuration. Radini design in general is based on industrial values with a compact footprint and hygienic features. We also receive positive feedback on the new developed intuitive HMI touchscreen, which provides the operator the possibility to store all process parameters per product recipe.”

AN EXAMPLE OF MODULARITY

With Radini Rademaker helps bakeries to transition from a manual pastry making process to fully automatic

process. This can be staged over multiple years depending on required capacities and the level of capital available. Often the first step is to eliminate reversible sheeters out of the block making process and replace this for an L-Shape pastry block maker. This allows the bakery to run pastry sheets from 4-10 layers and after to be manually folded to a pastry block of an additional 2,3 or 4 layers, resulting in 4 to 40 layers total. The blocks can be rested, retarded or further processed by a reversible sheeter to make pastry rolls to feed a universal line.

The next step in automation is to add a block processor. The pastry blocks can be placed on the infeed of the block processor where the blocks are continuously sheeted to the required thickness, which is a great advantage compared to the intermitted process of pastry roll processing.

Some bakeries will never step away from a process where the block making is separate from block processing. Because the retarding and resting of dough blocks gives certain product quality improvements, which are more important for some bakers.

A separate block making process from block processing has many more advantages:

- With 1 block maker you can feed up to 3 block processing lines
- Flexibility in planning block making can be done at a different time and often faster than block processing.
- It allows the bakery to run smaller batches and different recipes with limited down time

“In this context we created the possibility for a full u-shape laminator, which can be used to produce pastry blocks on section 1 and 2 whilst placing retarded dough blocks on section 3 for butter pastry and croissant production. For laminated dough with margarine, a full continuous automated process is used by running all 3 sections,” Rademaker explains.

SPEED AND CONTROL

Verhoeven Bakery Equipment Family is another global supplier of baking equipment that shared their insight with European Baker&Biscuit on this type of machinery. According to them, the faster the line runs, the faster the layer structure comes together, which could affect the layer structure. For this, it is important to choose correct line layout, with corresponding reduction steps and/or cooling rest paths.

“Our lamination techniques consist of the French- & the Scottish / All-In method. In the French method, a block of butter is folded into the dough. The Scottish method means that the blocks of butter are actually twisted into the dough. Then there is also the possibility of laminating without butter, and this is to make the slice of dough more stable,” the company’s experts told us. A line for laminated products always consists of a laminator and a universal line. The laminator is for making the layers in the dough and the universal line for making the final products. In addition, a third

branch could also be made, for a croissant line, for example.

“We supply laminators from 800 kilograms per hour up to 8000 kilograms per hour. With a combined line of lamination and artisan products, e.g. buns & rolls and/or bread, there is usually a U setup. This is because with laminating line you always have to go around the corner to make the layers. Regardless of the desire for the type of lamination, we see that production quality is becoming increasingly important. There is an increasing demand for higher production capacity, with constant quality remaining important, of course. With all the above methods, we can respond to this.”

AN EVOLVING MARKET

According to Verhoeven's experts, we are experiencing a change in the market. “In fact, companies want to automate more and more, whereby an investment in a well thought-out production line becomes increasingly important. Especially with a specific production process, according to the

customer's wishes, we can perfectly respond to this changing need with our customized solutions.”

Verhoeven Bakery Equipment Family offers turnkey projects, where the line (usually) starts with a laminator. Because they do everything in-house (under one roof), the entire line, i.e. from the laminator to the packaging process, can be perfectly matched. Which, of course, provides a lot of efficiency and flexibility.

CONCLUSION

Sheeting and laminating dough represents a fundamental process in industrial-scale bakery operations, essential for achieving uniformity, efficiency, and product excellence. Whether embracing automated solutions for high-volume production or upholding artisanal traditions, bakeries must navigate the technical challenges inherent in this critical stage of pastry-making. By leveraging innovative equipment and precise process controls, they can elevate their offerings and delight consumers with a diverse array of impeccably crafted baked goods. •

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Scoring Big in Bread Making

At its essence, scoring refers to the deliberate slashing or cutting of the dough's surface just before it enters the oven. This seemingly simple act serves multifaceted purposes, each deeply rooted in the science of bread making.

By Tudor Vintiloiu

One of the primary objectives of scoring is to control the expansion of the dough during baking. By creating intentional weak points in the surface, bakers can guide the direction and extent of oven spring—the rapid rise of dough as it bakes—ensuring uniform expansion and preventing unsightly ruptures or uneven shaping. Moreover, scoring plays a pivotal role in shaping the aesthetic appeal of the final loaf. From the classic patterns of French baguettes to the intricate designs adorning artisanal sourdough loaves, the score marks not only distinguish one bread type from another but also serve as a visual signature of the baker's expertise. In artisan-style production, where tradition meets innovation, bakers often utilize scoring as a means of creative expression, showcasing their skill and artistry through elaborate designs that range from classic to avant-garde. In industrial-scale bakeries, where efficiency and consistency reign supreme, the scoring process undergoes meticulous optimization. Automated scoring

machines equipped with razor-sharp blades ensure swift and precise incisions, capable of handling high volumes of dough with unparalleled accuracy. These machines are engineered to deliver consistent results, adhering to predefined patterns and depths to maintain uniformity across thousands of loaves. While scoring may seem straightforward, it poses several challenges, particularly in industrial settings. Factors such as dough consistency, temperature, and hydration levels can affect the scoring process, necessitating precise adjustments to ensure optimal results. To address these challenges, equipment manufacturers are continually innovating, developing scoring solutions that offer greater flexibility, efficiency, and control. Additionally, advancements in blade technology, such as laser or ultrasonic scoring, are revolutionizing the industry, offering unparalleled precision and consistency. By harnessing the power of automation and cutting-edge materials, these innovations empower bakers to elevate their craft and meet the evolving demands of the market.

KATANA-LIKE CUTTING PRECISION

Now more than ever, food manufacturers are facing multiple challenges. They must adapt to market demands for varied products of consistent quality while maintaining a high level of industrial performance and facing labor shortage challenges. ABI's experts introduced the KATANA Scoring System at last year's IBA Trade Show, and it is a complete flexible robotic scoring solution that combines unique End of Arm Tools with a precise 3D vision system as well as optimized robotic programming for the robot's movement, and an intuitive Human Machine Interface (HMI). All these combined create what the company calls 'the most comprehensive scoring system available in the marketplace'. Thus, the KATANA Scoring System offers industrial bakers various scoring possibilities for a wide range of products with unrivaled precision and product consistency. "With the KATANA scoring robot, scoring is becoming more than just the practical process of avoiding unsightly bursts that could occur during baking. Bakery manufacturers can make their creativity go further and use various product patterns to personalize products and bring unique offerings to the market," explains Felix PANG, Robotics Customer Solution Specialist at ABI. The KATANA scoring solution offers several benefits: accurate scoring to improve productivity, the opportunity to score a wide range of products, and a user-friendly interface for easy use that doesn't require any special prerequisites.

THE NEW WATERJET SCORING TOOL

In order to help bakeries meet market expectations for product diversity, the KATANA scoring system now integrates the waterjet scoring tool in addition to the ultrasonic plunge and drag blade options. Each tool meets a specific product requirement: the waterjet is dedicated to end-products, like baguettes or Viennese bread, while the ultrasonic drag blade adapts to stiffer doughs or doughs with inclusions, and the plunge blade is excellent for end-products, such as pretzels or breads. Thanks to the addition of the waterjet scoring tool to the

complete KATANA scoring system, bakers can provide more personalized solutions to differentiate their offers and meet the market demand for unique products. To create the perfect customized product, scoring parameters such as cut depth, cut angle, compound angle, and plow angle can be adjusted in the software. Coupled with the articulated arm of the robot movement, the high-pressure water stream of the new waterjet scoring tool enables complex angles and scoring patterns. To guarantee the best product quality, both the ultrasonic technology of the drag and plunge blades and the waterjet tool have minimal contact with the dough. This doesn't introduce any additional stress to the dough, preserving as much of the product integrity as possible.

ACCURACY OF SCORING POWERED BY SOFTWARE

ABI developed proprietary software to make the KATANA robot scoring solution particularly precise and reliable, and well adapted to the baking industry. The KATANA Scoring System can handle variability in product dimensions and product positions. Besides the size, shape, and location of the product, this solution can identify the multi-point topographical mapping in order to maintain consistent scoring with a uniform depth throughout the length of the cut. This solution also makes sure to follow the exact shape of the product. Through the 3D vision system and subsequent KATANA processing, the system can accurately locate the positions of all products to be scored. Even if the product positions on the conveyor or carrier vary from product to product, KATANA's increased accuracy confirms that the scores are placed onto the product at the expected positions. 3D vision also allows the system to identify any variance, enabling the robot to make corrective actions and maximize the yield of the system.

EASY OPERATION

Only one operator with basic training is required to operate the KATANA scoring system. No technical, machine, or programming knowledge is required. All the operations of the KATANA Scoring System can be done through a single intuitive, ergonomic user interface. Recipe management, scoring parameter changes, preventative maintenance actions, and statistical monitoring can be easily performed from the HMI screen. A limitless number of recipes can be stored in the system to match any range of products. KATANA's user interface provides the baker with absolute control of the scoring pattern, robot capability, and production settings all at their fingertips. The equipment is also very easy to clean as the ultrasonic drag and plunge blades utilize rapid oscillations and have very little contact with the dough, resulting in no residual transfer of dough to the blade. Additionally, the KATANA robot cell is designed with easy cleaning in mind thanks to the continuous welding used throughout cell construction for optimal hygienic conditions.





KOENIG'S ISCORE SOLUTION

To simplify and automate cutting technology for bakeries, Koenig also offers automation and gentle dough handling for efficient operation with the innovative iSCORE bread scoring system.

According to the company, highly sophisticated technology makes the iSCORE system one of the most advanced scoring systems on the market that simulates and even improves the skills of a master baker. With automated cutting and 'artificial intelligence' functions, bakeries can save valuable resources, such as manpower, time and dough, as no residual dough is produced during the high-precision cutting.

There is an unlimited number of patterns. 'Simple' cuts on baguettes, decorative cuts in 'artisan' style or complex decorative patterns on bread loaves, the team of highly qualified professionals design the appropriate solution for bakeries of all sizes. Koenig's solution offers up to 12,000 scores per



hour per robot (using a single cutting tool), with a system able to integrate an unlimited number of robots. Additionally, each machine is ready to incorporate rotary blades, water-jet tools and ultrasonic knives or blades, indifferently. "Just change the scoring tool and the system will be ready. Our three interchangeable scoring technologies can be incorporated (only one, two or all three) at any time," the company says.

Tailored Scoring and 3D Vision System

The system scans the product in 3D and adapts the user-defined scoring pattern to the length, width, height and shape of each product. Thanks to the integrated vision system, the exact position of the loaf on the board is detected and the score is adapted to each loaf individually, regardless of its position on the board.

The automatic product recognition feature eliminates the need for program changes, streamlining

operations significantly. By identifying the specific product to be cut, the system seamlessly adjusts the cutting tools without requiring manual intervention. This automated unit operates continuously, ensuring uninterrupted production flow. With the ability to autonomously recognize different products, there is no downtime between product changes, enhancing overall efficiency.

Moreover, the system boasts a self-learning capability, continuously monitoring and adapting to variations in product dimensions. Whether fluctuations occur hourly, daily, weekly, or monthly, such as those influenced by climate conditions in the bakery, the system remains vigilant.

PROACTIVE APPROACH

Additionally, the system includes built-in monitoring functionalities to oversee its operation and preempt any potential accidents that could lead to unwanted downtimes. This approach to safety ensures smooth and uninterrupted production processes.

In terms of performance, the specially designed blade effectively drags a thin layer of dough, covering the open cells of the loaf to prevent degassing. This innovative approach ensures optimal scoring even with high-water content dough, maintaining product quality and consistency.

For ease of use, the system features an intuitive graphic editor, enabling users to set a new cutting reference in just five minutes. This unique editor provides unparalleled flexibility, allowing users to create any number of scoring patterns effortlessly, without the need to halt production.

In terms of maintenance and cleanliness, the system is meticulously designed for simplicity. The control system is located entirely outside the working area, ensuring easy access for cleaning and maintenance tasks. The structure is carefully engineered to eliminate any un-cleanable spots, simplifying upkeep and minimizing downtime. Finally, the iSCORE system is available in various models, catering to the diverse productive capacities of customers. Each model includes essential components such as a scanner unit, cutting robots, conveyor system, electrical cabinet, and CPU, offering comprehensive solutions tailored to specific needs and requirements.

CONCLUSION

While the techniques and tools employed in scoring may vary between industrial-scale bakeries and artisan-style production, the underlying principles remain steadfast. From controlling oven spring to enhancing visual appeal, this seemingly modest stage holds the power to elevate the humble loaf into a masterpiece of flavor and texture. •

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In Search of Everlasting Freshness

In the ongoing fight against food waste, dedicated ingredients give bakers and manufacturers clean label options that help both with prolonging the life of bread and bakery products and respecting their customers' desire for recognizable ingredients in their everyday bread.

By Jo Ilie

Bread has been one of the highest food waste categories. It is estimated that, globally, bread is produced at 100 million tons per year, leading to hundreds of tons being wasted daily. According to the 2016 data from the Food and Agriculture Organization of the UN, bread is the fourth most wasted food in the world with an estimated rate of 29.1%, causing significant environmental concerns and economic losses worldwide. Adding general bakery products losses, the wastage amounts to about 10 million tons worldwide every year.

“Due to its highly nutritious properties with various nutrients, bread is highly susceptible to staling and spoiling”, wrote researchers Ben Rejeb et al in the *Molecules* scientific journal in 2022. “In fact, bread is made from cereal grains that are quite indigestible in

their raw state, and as a result, is considered resistant to microbial attack. However, due to the combined effects of heat and moisture during its baking process, starch in bread becomes digestible in its gelatinized form and therefore prone to microbial attack, which explains bread's short shelf life.”

Bread becomes wasted food after it goes through a process of staling. The staling process causes the loss of important sensory parameters, such as flavor, texture, and an increase in crumb firmness and loss of freshness. Lipid and shortening help retard the crumb firming process, while the supplementation of new ingredients (i.e., fat monoglycerides, sodium stearyl lactylate, and bioemulsifier) significantly reduces bread and bakery products staling.

That is where ingredient makers can help bakers and



the whole baking industry reduce the waste that happens on the shelf. May that be conventional ingredients like propionate-based solutions that extend mold-free shelf life and food-grade acidifiers based on single (di)acetate salts or clean label fermentates – fermented wheat, rice and other common food substrates – and dry neutralized vinegar, reformulation can help prolong the life of baked goods and prevent food waste at a large scale.

FIGHTING THE MOLD

Many consumers actively seek simple, transparent labels with ingredients they understand. For nearly three-out-of-five U.S. shoppers, transparency on labels means simple and recognizable description of ingredients. Therefore, certain artificial shelf-life extension ingredients are not viable options for clean label baked goods.

Kemin Industries, a global ingredient manufacturer, has developed a unique, potassium sorbate alternative for the bakery industry. SHIELD V Plus Dry, a natural ingredient made through cutting-edge technology, offers an unparalleled solution for inhibiting mold growth and extending the shelf life of bakery products, and is now available for food producers in the

Messe Stuttgart
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EMEA (Europe, Middle East and Africa) region. Developed by a team of expert food scientists and industry professionals, SHIELD V Plus Dry combines the preservation properties of buffered vinegar with the anti-mould properties of a botanical extract. The result is a powerful food solution that significantly inhibits mold growth in cakes and delays the formation of mold in tortillas and flatbreads, naturally prolonging the freshness and quality of bakery products. Unlike traditional preservation methods that rely on synthetic additives, SHIELD V Plus Dry is a consumer-friendly option that boasts a balanced flavor profile and heat stability. It allows manufacturers to meet the demands of health-conscious consumers without compromising on taste or sensory attributes. “Our product represents an additional step in natural preservation, offering bakery manufacturers a powerful tool to extend the shelf life of their products while meeting consumer demands for clearer labels and superior quality,” said Caroline Ecoffard, Product Platform Manager, Kemin Food Technologies – EMEA. One of the key features of SHIELD V Plus Dry is its versatility. While specifically formulated for bakery products, this innovative solution can also be applied as a natural alternative to potassium sorbate in emulsions, sauces, dressings and other highly aqueous foods. Its naturally occurring active molecules—such as acetic acid and sorbic acid—work in synergy to slow down the development of molds, ensuring product freshness over an extended period. Natural Mold Inhibitors (NMI) from Lesaffre are clean label solutions to prevent mold growth and are effective replacements for calcium propionate and potassium sorbate in breads and baked goods. Saf-Pro Natural Mold Inhibitors, such as SafPro XtendLife 40, are specially formulated for versatile and effective shelf-life extension in applications like bagels, pan breads, buns, pizza, and more. XtendLife 40 blends cultured wheat starch and naturally fermented citric acid. Cultured wheat starch is a natural source of organic salts with high concentrations of propionic acid. Citric acid further lowers pH and improves the efficiency of the product to suppress mold. Like calcium propionate, XtendLife 40 and other Saf-Pro Natural Mold Inhibitors have minimal effect on fermentation, making them ideal for yeast-leavened applications like hamburger buns and dinner rolls. Unlike calcium propionate, Saf-Pro Natural Mold

Inhibitors make it simple and straightforward to achieve clean label and transparency goals. NMIs like XtendLife 40, leave ingredient lists on packaged baked goods uncluttered and easy to read.

COMBATING STALING WITH ENZYMES

Textural characteristics are critical to shelf stability in applications like buns, flatbreads, and pita breads. Anti-staling (AST) products extend freshness by improving crumb softness, and in some cases, provide more crumb resilience to the baked goods. Bakeries can optimize production by pairing AST ingredients with Natural Mold Inhibitors.

Saf-Pro Star-Zyme AST Bun & Flatbread + NMI from Lesaffre is an all-natural dough conditioner specially formulated for shelf-life extension. Designed to be a turnkey solution for industrial bakeries, Star-Zyme AST Bun & Flatbread + NMI combines AST enzymes with cultured wheat starch as a natural preservative. The clean label enzyme blend is recommended for baked goods that will be held under refrigeration with shorter shelf life requirements.

Whether for par-baked or straight doughs, formulating with Star-Zyme AST Bun & Flatbread + NMI helps preserve the textural experience for the end consumer. The enzyme blend is recommended for pizza, flatbread, bun, tortilla, and pita applications.

FRESHNESS IS KEY

Another recent solution comes from Puratos, one of the largest ingredient makers in the world. “Freshness is a key driver of bakery purchases, especially in sweet products,” says Ben Ledger, marketing manager for Puratos UK. “There’s nothing quite like biting into a cake or doughnut that tastes like it came out of the oven only hours ago.” So prolonging shelf life is highly desirable, but improvements must be meaningful - and achieved, where possible through clean label solutions. That’s why Puratos created Acti Fresh. “This ingredient retains all-important taste and texture, while prolonging shelf life by up to 50%. It’s easy for bakers to use, opens up more distribution opportunities and ensures consumer satisfaction with product quality. Plus, importantly, it reduces food waste in-store and in the home, allowing us to take a positive step towards a greener future.”

Acti Fresh is part of a range of enzymes-based solutions to be used in cake production. Using enzymes provides many advantages. First, the use of enzymes generally help to improve the texture of cakes. Second, the use of enzymes does not bring additives and is thus compatible with a cleaner label approach. Enzymes are naturally present in our environment and their usage does not produce additives. They enable improved texture - softness, cohesiveness, resiliency, moistness, melting and chewiness - and allow for clean(er) labels. Acti Fresh also works in frozen cakes, provided that shock freezing, and transport are done properly. With so many options, bakers and manufacturers can choose what works best for their products and their customers. •

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Yeast Protein, Helping Bakers **Keep Up with the Health Trend**

Yeast protein, a type of protein derived from brewing yeast, is a natural and dry fermented ingredient, suitable for vegan diets, free from GMOs, and has no allergens. Its advantages help bakers reformulate to increase the protein content of their products and answer to the market's expectations.

By Sam Hu, Deputy general manager of Angel Baking & Food Innovation Technology Center, Angel Yeast Company



In the trend of dietary 'healthization', "low-carb, low-fat, high protein" has become a leverage in consumers' minds. The per capita and annual demand for plant protein and animal protein have significantly increased worldwide. In recent years, due to constraints such as resource availability and climate changes, protein sources have started to upgrade, and protein substitutes have gradually become a development trend in the industry. In this context, yeast protein has emerged as a standout candidate. Currently, there is a huge protein deficit worldwide, and the global protein market demand continues to grow. According to The Brainy Insight, the global yeast protein market is expected to reach USD274m by 2030, increasing at a CAGR of 8.9%. Asia Pacific is expected to grow the fastest. The sustainability advantages of yeast protein have also made it increasingly favored by the food industry. Yeast protein is a type of protein derived from brewing yeast (*Saccharomyces cerevisiae*) through processes such as enzymatic hydrolysis and extraction. It is rich in protein, offers excellent flavor, and is known for its high safety standards. As a result, it is widely accepted and can be utilized in food processing for long-term application. Angeopro, the yeast protein range developed by Angel Yeast Company, is a high-quality protein ($\geq 75\%$), which contains essential amino acids in a higher proportion compared to the WHO/FAO standards, with a well-balanced distribution. The ingredient is heat and pH tolerant with a stable structure of yeast protein making it highly resistant to thermal energy and has good tolerance to acidity and alkalinity, making it suitable for baking purposes. It is free from gluten, soy products, and dairy products, reducing the risk of allergies. Additionally, it is non-genetically modified. It can mask unwanted off-notes and it is itself free from yeasty notes and off-notes. The production of yeast protein is suitable for large-scale manufacturing, significantly reducing water consumption and land usage. Its carbon emissions are only one-twentieth of beef production, making it environmentally friendly and significant in terms of sustainability.

YEAST PROTEIN IMPACT ON FORMULATIONS AND DOUGH RHEOLOGY

Yeast protein, like soy protein and pea protein, has inherent water-absorbing properties. When added to dough, it can make dough tougher and will affect the dough's rheological properties. Therefore, extra water is needed to prevent the dough becoming too tough. Moreover, when the yeast protein level is

relatively high, it is necessary to add some wheat gluten or other ingredients that strengthen the dough gluten to improve its properties and reach the ideal baking performance.

Therefore, when yeast protein is used for high-protein bread that contains above 12% protein, it is necessary to consider the overall balance of the dough formulation. Angel Yeast Company has been developing and acquiring knowledge of how yeast protein is best applied in bread and other bakery products, and can provide tailored technical support for the customers.

Yeast protein can be directly mixed with flour, offering a simple and convenient operation, ultimately enhancing the protein content of baked goods. It is suitable for baking products such as toast, energy bars, cakes, cookies and tortilla.

COMPETITIVE ADVANTAGES FOR YEAST PROTEIN

Compared to plant protein, yeast protein requires less arable land and does not use pesticides or antibiotics. In addition, research has shown that the carbon emissions from producing fresh yeast protein are only one-twentieth of that from producing beef. Currently, the fermentation process for producing yeast protein is mature, with high manufacturing efficiency, making it suitable for large-scale production. It also significantly reduces water consumption and land area requirements.

After amino acid score correction and digestion rate adjustment, yeast protein surpasses soy protein in terms of amino acid score and is on par with whey protein.

The ratio of essential amino acids to non-essential amino acids reaches 0.91, meeting the FAO/WHO standard of 0.6, surpassing soy protein and approaching whey protein. Yeast protein significantly delays the transformation of fast muscle fibers to slow muscle fibers. It also substantially alleviates age-related muscle loss and mitigates the age-related decline in intestinal histology and function, suggesting a potential involvement of gut microbiota in the intervention and regulatory mechanisms.

Yeast protein is a complete protein with a balanced amino acid composition, superior protein quality compared to plant protein, and equivalent to whey protein. It exhibits slow digestion and belongs to the category of "slow-release protein," providing sustained supply to meet the body's needs.

Yeast protein is sold in the European, American, and Asia-Pacific markets, catering to large-scale food processing factories, vegetarian bakers and artisans. •

Anuga FoodTec 2024: Setting the Stage for Responsible Innovation and Global Collaboration

Anuga FoodTec 2024 is poised to set new standards in the food and beverage industry, bringing together global leaders, innovators, and stakeholders to explore the latest advancements and challenges shaping the sector. In anticipation of this pivotal event, European Baker&Biscuit sat down with Matthias Schlüter, director of Anuga FoodTec, to delve into the exciting developments and initiatives awaiting attendees. With the trade show approaching, Schlüter provided insights into the evolution of exhibitor participation, strategies for maximizing networking opportunities, and the array of innovative programs designed to foster collaboration and knowledge exchange. As the industry grapples with pressing issues of sustainability and responsible production, Anuga FoodTec 2024 offers a platform for dialogue, discovery, and transformation within the global food and beverage landscape.

By Tudor Vintiloiu

How has the participation of exhibitors evolved in comparison to previous years, and what are the organizers' expectations for the upcoming edition?

In comparison to previous years, the Anuga FoodTec 2024 has seen a significant increase in exhibition space, nearly 50% more than in 2022, although not yet fully back to pre-pandemic levels. We're anticipating the participation of around 1,350 exhibitors from about 50 countries. This includes many key accounts that had paused in 2022, as well as major companies returning after a long absence, such as Kuka and SIG Combibloc, highlighting a robust industry comeback. The main theme for Anuga FoodTec 2024, "Responsibility," reflects our collective ambition to address how the food industry can innovate for a sustainable future and ensure global supply security. It's about setting the right course for tomorrow, together. As such, Anuga FoodTec will serve as a critical platform for industry leaders to engage in discussions about sustainability and innovation, emphasizing the importance of

a collaborative approach to shaping the future of food production and supply.

Can you provide insights into the strategies that are in place to maximize networking opportunities for exhibitors?

To maximize networking opportunities for exhibitors, several strategies are in place. The central location of the exhibition grounds in the city is naturally conducive to networking, offering an excellent opportunity for participants to engage in further discussions at local bars and restaurants post-event. However, the event itself provides numerous opportunities for networking on-site. These include dedicated networking areas, industry-specific seminars and workshops that facilitate interaction among attendees, and digital platforms that allow participants to connect before, during, and after the event. These initiatives are designed to enhance the engagement between buyers, retailers, distributors, and exhibitors, ensuring that Anuga FoodTec remains a pivotal event for fostering connections and exploring business opportunities.



What initiatives or special events are planned within the fair to foster knowledge exchange, collaboration, and business development among exhibitors and attendees, and how do these align with the overall goals of the trade show?

The extensive event program of Anuga FoodTec 2024 is crafted to impart crucial insights and impulses for a cross-industry dialogue. The Main Stage, for instance, centers around the overarching theme of Responsibility in the food supply chain. Esteemed experts will present and deliberate on innovative technologies, ecological methodologies, and socially acceptable practices shaping the future of food production. Novel event formats such as Science Slam, Open Expert Stage, and Deep Dive provide diverse opportunities for active participation. On the Innovation Stage, collaboration partners, start-ups, companies, and representatives from the scientific community converge to showcase inventive approaches and foster "out-of-the-box thinking." Additional formats, including the Female Leadership Event, Matchmaking: Sustainable FoodTech Solutions, and the Careers Day on Friday, are specially tailored to facilitate networking and foster new connections.

What are some of the novelties this edition presents?

This edition of Anuga FoodTec introduces several innovative features, emphasizing sustainability and consumer trends. A new Environment & Energy section will showcase sustainable solutions for process water treatment and waste heat recovery. Reflecting shifting dietary preferences, especially among younger consumers, plant-based products are a major focus, highlighting the industry's adaptation to changing food consumption patterns. Additionally, the fair will debut a Cultivated Food section, featuring industrial-scale bioreactors, indicating a significant advancement in sustainable food

production. Across all these novelties, the overarching theme of responsibility permeates, with numerous solutions aimed at fostering sustainable and ethical practices within the industry.

How will the baking sector be catered for in terms of products and exhibitors?

The significant number of leading companies from the sector that attended Anuga FoodTec in 2022 demonstrates the vast array of solutions that exhibitors have at their disposal. What sets Anuga FoodTec apart is its comprehensive showcase of solutions across all process stages, primary and secondary packaging machines, packaging materials, food safety, automation and digitization solutions, to solutions for internal material flow (intralogistics), as well as the previously mentioned Environment & Energy, and a forward-looking perspective in the realm of Science & Pioneering. Thus, visitors can find all the solutions they require to produce their end products.

What are the three aspects that would encourage visitors to attend this edition of Anuga FoodTec?

Visitors to this edition of Anuga FoodTec have several compelling reasons to attend, centred around three key aspects that underscore the event's significance in the food and beverage industry. Firstly, the fair is a showcase of pioneering technology and exhibits, drawing approximately 1,350 companies, about 60% of which are international. The expansion in the average area occupied by exhibitors means that attendees will witness an even larger display of machinery and innovations, including many operational exhibits. Highlighting the scale of what's on offer, one exhibit stretches an impressive 37 meters, showcasing the diversity and technological advancements present. Secondly, Anuga FoodTec's guiding theme of "Responsibility" positions the fair at the forefront of sustainability within the industry. This year, the event is dedicated to exploring the facets of sustainable production and how businesses can achieve lasting success through responsible practices. Topics such as energy efficiency, resilient supply chains, Industry 4.0, sustainable packaging, and alternative protein sources, including the novel area of cultivated foods, will be thoroughly explored. This commitment to sustainability is not only timely, but also appeals to a growing segment of the industry focused on reducing environmental impact and ensuring ethical production. Lastly, the fair is a hub for networking and professional development, offering an array of events designed to facilitate cross-industry dialogue and provide extensive networking opportunities. With the addition of innovative automation solutions and a Careers Day, Anuga FoodTec is actively engaging in inspiring the next generation of industry professionals, offering them a glimpse into potential career paths within the sector. This blend of showcasing the latest industry trends, providing a platform for professional growth, and highlighting sustainable practices makes Anuga FoodTec 2024 an indispensable event for anyone involved in the food and beverage industry, promising a comprehensive experience and deep insights into the industry's future. •



Berndorf Band Group

Hall 9.1 Stand E078

As leading full-service supplier of steel belts and belt systems, we provide tailor-made solutions, which unite all requirements for the baking industry. The dark and abrasion resistant surface of the belts absorbs heat, saves energy, ensures consistent product quality and keeps fibers and remnants of fat from lodging in the steel belt. Our steel belts resist temperatures of up to 400° C/750° F and guarantee easy cleaning and highest sanitary standards. Additionally a global service network enables us to be as close as possible to our customers and provide them 24/7 with prompt assistance.

www.berndorfband-group.com



FPS Food Process Solutions

Hall 10.1 Stand C039

FPS Food Process Solutions is a global leader in turn-key food freezing and cooling equipment. We provide innovative systems to ensure the highest efficiencies and to meet the most stringent sanitary demands. They include Spiral Freezers, IQF Tunnels, Impingement Freezers, CF/VRM MultiPass™ Freezers and the Spiral Immersion System (SIS)™. We cover industry sectors such as Meat & Poultry, Fruits & Vegetables, RTE/ Ready-Made Meals, Alternative Proteins, Bakery, Pet Food and more.

www.fpscorp.ca



Goodway Technologies

Hall: 10.1 Stand D030 / 238

Goodway Technologies is your cleaning and sanitizing solutions partner. Our market-leading dry clean solutions deliver best-in-class performance and results. Our service includes industry experts who partner with you at every step, from qualifying our technology with complimentary on-site demonstrations to post-sales training and continuing support. Headquartered in Stamford, CT, USA, with regional offices in Germany and Dubai, our solutions include low-moisture dry steam cleaning systems, PureBelt® conveyor belt cleaners that effectively remove soils, allergens, and more, like specialty industrial vacuum cleaners for picking up various materials from liquids to powders and our BIOSPRAY® alcohol spraying systems.

www.goodway.com



Ideas for the future.

Albert Handtmann Maschinenfabrik GmbH & Co. KG

Hall 6.1 / Stand B010

Handtmann. Your solution partner with line and process expertise.

When Handtmann Maschinenfabrik was founded in 1954, one aspect was already particularly important to founder Arthur Handtmann: the company's consistent focus and orientation on the needs and requirements of the customers. This consistent focus has been key for the success of the Maschinenfabrik ever since. Handtmann has developed from a mere supplier of filling and portioning systems into an international group of companies, now offering integrated process solutions from product preparation to filling and portioning technology, separating technology and product handling. Thanks to their versatility, Handtmann solutions are deployed in a wide variety of food sectors, such as meat and sausage products, baked goods, vegetarian/vegan/meat substitutes, pet food, confectionery or dairy products and more. The Handtmann customer base includes both small businesses and start-ups as well as medium-sized companies and large industrial enterprises from all over the world.

www.handtmann.com/food

HEAT AND CONTROL

HEAT AND CONTROL

Hall 6.1 Stand A070

Advancing food processing technology with creativity, passion, and unmatched expertise at a global scale. For over 70 years across food industries and applications, Heat and Control's specialised equipment solutions have set the standard for yield, efficiency, and safety. Offering complete turnkey solutions featuring integration from start to finish ensures full line efficiency and performance.

Food Processing: From raw produce preparation and value-adding to frying, cooking, seasoning, and coating.

Product Handling: Maintain efficient production at optimal capacity. Smart design and line management that achieves accurate feed, accumulation, and distribution flow. Includes conveyors, elevators, and proportional feeding systems.

www.heatandcontrol.com



Flexible Packaging Solutions

IMA Ilapak flexible packaging machine

Hall 7.1 Stand A050 / B059

IMA Ilapak, with its vast range of flexible packaging solutions, can satisfy every Form, Fill, and seal packaging requirement of food, pharma, medical devices, and wet wipe industries.

Besides vertical baggers and flow wrappers, IMA Ilapak portfolio includes systems for modified atmosphere applications, product handling solutions, counting, and weighing systems and complete, fully automated lines.

IMA Ilapak believes that being well focused on market needs is key to customer satisfaction. This focus describes the Industry oriented approach to its customers, technology and developments - it does not produce generic machines, rather it engineers the products with your specific needs in mind right from the start.

www.ilapak.com



TECNOPOOL S.p.A.

Hall 10.1 – Booth F060

“A world leader in the manufacturing of food processing equipment and implementation of complete lines for the thermal treatment and processing of any food, covering product make-up, proofing, pasteurizing, baking, cooling, deep-freezing as well as overall handling. Flexibility, reliability, efficiency, innovation, and customer-focus are the pillars that allows us to design and manufacture tailor made solutions for food-processing lines, capable of meeting any market requirement.”

<https://tecnopool.it>



WALTERWERK KIEL

Hall 4.1 Booth B019

WALTERWERK KIEL is a leading manufacturer of industrial wafer baking machines for sweet wafers, Monaka wafers and savoury snacks. WALTER offers three main machine lines: JUPITER for sweet wafers, MARS for baked moulded products and the latest development METEOR for baked chips. Customers in more than 80 countries worldwide manufacture their wafer products on WALTER baking ovens. All machines are designed, built and tested in our factory in Kiel, Germany.

www.walterwerk.com

Naan of Your **Business**



One of the main trends within the European bread market has been the growing consumer interest in specialty and artisanal varieties. Although traditional types such as white bread continue to account for the bulk of consumption, more Europeans now appear inclined to seek out products with a more premium image as purchasing frequency of bread has declined.

By **Jonathan Thomas**

The market for specialty and artisanal bread is wide ranging and encompasses various products, some of which have a unique history and heritage – flatbread, for instance, is believed to date back some 6,000 years.

Interest in specialty and artisanal form of bread amongst European consumers has been boosted by the expansion of the street foods market, to which growth has returned in the post-pandemic world. Cuisines such as Mexican, Indian, Middle Eastern and Mediterranean (which make heavy use of varieties such as flatbreads) occupy a strong position within the market for street foods. In addition to the traditional favorites such as burritos and wraps, other dishes incorporating specialty breads include gyros (a Greek version of doner kebab), sabich (a pita stuffed with vegetarian foods which originates in Israel), roti canai (a pan-fried flatbread most often served with curry) and bake and shark, a Trinidadian dish consisting of a fried flatbread filled with shark meat.

In global terms, what might generally be termed street food is eaten by around 2.5 billion people every day, or almost a third of the world's population. Consumption is heavily skewed towards younger age groups such as millennials, for reasons such as its wide variety, its convenient nature, the fact that it is freshly prepared on the premises and its suitability for sharing images on social media platforms such as Tik Tok and Instagram.

SOURDOUGH & OTHERS

One of the real successes within the European market for specialty bread of late has been sourdough, which is made using a fermented dough. According to Mordor Intelligence, the global market for sourdough bread is set to increase from USD2.45bn in 2024 to around USD3.3bn by 2029, representing growth of almost 35%. Much of this can be attributed to its association with healthy eating (for example, it usually features only natural ingredients, it is less processed than other types of bread and has a relatively low glycemic index) and rising consumer interest in long-fermented forms of bread. Market growth should also be boosted by its versatility, since it is finding favor in other sectors of the food industry such as pizza bases, biscuits, desserts and patisserie.

Sourdough has been especially successful in the UK, where it accounts for an estimated 45% of the specialty loaves sector. This rises to 50% of all specialty loaves sold via in-store bakery (ISB) channels, with retailers such as Tesco and M & S having expanded their offerings within this category in recent years. Although white varieties are the most popular, accounting for over 60% of all sourdough loaves sold in the UK, alternative types featuring brown or rye flour have emerged as the market has developed.

In addition to the qualities mentioned previously, many consumers appear to associate sourdough bread with improved digestive health, which further explains its



recent growth in popularity. In 2023, research from Holland & Barrett found that 58% of UK consumers had experienced digestive health problems in the past, while 63% of the more health-minded people claimed to be actively seeking out food and drinks aimed at combating these. However, price has been perceived as a potential barrier to further growth of the market for sourdough bread since it often costs more than standard equivalents. To address this, some of the UK's main grocery retailers have attempted to make sourdough loaves more attractive from a price perspective.

Sourdough starters are typically used by many European bakers in the manufacture of pumpernickel bread, which has its origins in Germany and is also finding favor throughout the region. Its distinctive dark color comes from the coarse rye flour used in the baking process and it has a slightly sweetish taste. Health represents a main driver within the market for pumpernickel bread, since it is rich in fiber (and therefore aids digestion) and antioxidants, due to the presence of minerals such as copper and selenium.

Rye bread is also becoming more popular in parts of Western Europe on account of its health benefits. Not only is it rich in fiber, but also it has been linked with assisting in cardiovascular health. Rye bread is especially popular in Eastern Europe, where rye grows well and produces large harvests, but has struggled in western markets such as the UK on account of its dense nature and strong taste. To counter this perception, some bakers have been blending rye with wheat flours to produce bread with a lighter color.

TORTILLAS & WRAPS

Tortillas represent one of the world's most popular forms of specialty bread. Across much of the developed world, they have come to be seen as a potential replacement for more traditional forms of bread such as white loaves, driven by factors such as the rising popularity of Mexican and Tex-Mex cuisine and their suitability for some of the more widely eaten street food options, examples of which include burritos and tacos. Demand has also been boosted by the fact that tortillas represent a suitable carrier for a range of ingredients such as meat, fish and vegetables. In recent years, there has been greater innovation in terms of fillings for tortillas, incorporating varieties such as jalapeno peppers, chipotles and exotic spice blends.

According to SkyQuest Technology, the global market for tortillas was worth more than USD23bn in 2022, a figure expected to increase by an annual average of around 6% to USD36bn by 2030. Mexico represents the world's largest market, with up to 20 tortillas eaten every day on a per capita basis, while the country accounts for an estimated 40% of global output. Elsewhere, consumption levels are

also relatively high in other Latin American countries such as El Salvador, Guatemala and Nicaragua, while the US market amounts to around 120 million tortillas per annum. The Western European market for tortillas (a sector which is defined as including tortilla chips, taco shells and tostadas, as well as flour and corn tortillas) was valued at USD3bn in 2023, with annual growth forecast to average around 7% over the next decade.

The UK has one of Western Europe's largest markets for tortillas, with annual growth expected to average 6% between 2023 and 2033. Mexican represents one of the most popular forms of ethnic food with UK consumers, with dishes such as fajitas, burritos, chimichangas and chili con carne commanding a strong following. Outlets offering Mexican and Tex-Mex cuisine are also well-represented within the UK foodservice sector – the Taco Bell chain, for instance, now comprises almost 140 sites, while Wahaca continues to expand within the London area. Another example is Tortilla, a QSR chain serving Mexican foods such as burritos and tacos. As of July 2023, Tortilla had 67 UK-based sites operated by the company, with an additional 10 franchised outlets. Traditional tortillas are soft, thin and unleavened breads, made from wheat or corn flours. Health concerns have impacted upon the market, given that more varieties positioned on platforms such as gluten-free or low-carbohydrate have appeared in recent years. During the summer of 2023, the Old El Paso range from General Mills was extended with Extra Thin Wraps, which were described as 30% thinner than regular tortillas and containing fewer calories. Another leading supplier of tortillas to UK retailers and foodservice customers is Mission Foods, which also competes in other sectors of the flatbread market. Its range includes XL Wraps (which are larger than standard tortillas) and chargrilled varieties, which offer a unique smoky flavor.

INDIAN FLATBREADS

India is home to numerous varieties of specialty breads, which have a wide variety of applications – for example, some are eaten as meal accompaniments, while others represent popular snacks and hand-held street foods. The Indian market for specialty breads features numerous differences and variances according to regional cuisine – for example, kathi rolls (a wrap filled with kebab meat and vegetables which is a popular form of street food) comes from Kolkata in the northern part of the country, whereas bhaturas (deep-fried flatbreads often eaten for breakfast accompanied by mixtures such as chickpea curry) carry strong associations with the Delhi region.

Naan bread is one of the most widely known forms of specialty bread originating from India, although it is also widely used in the cuisines of other Asian countries such as Bangladesh, Pakistan





and Afghanistan. It is made from wheat flour, traditionally cooked in a tandoor oven and has a distinctive teardrop shape. Some of the most popular forms of naan bread besides plain varieties include garlic, keema (which features a filling of minced lamb or mutton), paneer (which contains cheese), peshwari (which features a filling of nuts and raisins or sultanas) and butter naan, which is smeared with butter or ghee prior to serving. Many UK bakery firms have extended their presence into the naan bread category, to capitalize on the popularity of Indian foods. One such example is Warburtons, which introduced new Soft Naans in the summer of 2023. These were described as having a soft and fluffy texture and can be prepared in a toaster. Another popular Indian specialty bread is the paratha, which is commonplace throughout the country and consists of wholemeal flour baked in ghee. It is usually eaten with

various stuffings, often during breakfast, and has become one of the most popular forms of Indian street food. Other relatively well-known specialty breads within Indian cuisine include roti (flat and unleavened bread made from wholemeal flour), chapati (a wholemeal flatbread usually cooked on a griddle) and kulcha, a flatbread typically served as an accompaniment to chickpea curry, which is often brushed with ghee.

MEDITERRANEAN & MIDDLE EASTERN FLATBREADS

Some of Europe's more southerly countries have also had a strong impact upon the development of the market for specialty breads. From Italy is ciabatta, which is widely believed to have been created in response to the growing competition from French-style baguettes. Ciabatta, which is especially suitable for applications such as sandwiches, has a light texture and is characterized by large air bubbles in the center of the loaf. Another popular form of Italian specialty bread is focaccia, an especially chewy flatbread that can be topped with a variety of different foods. Its thickness and softness often depend upon where in Italy it is consumed.

Consumption of pita bread is also widespread throughout much of Europe. This double-leavened flatbread is made from flour, salt, water and yeast and is baked at a high temperature, which creates large air pockets in the middle. Although it has its origins in Greece, it also features strongly in other cuisines from the region such as Turkish and Lebanese. As is the case with many other specialty breads from around the world, pita bread features strongly in the street foods market.

The ongoing expansion of the Western European foodservice industry continues to boost interest in pita breads. In 2022, the Miznan restaurant chain was launched in the UK, which has its roots in Israel and specializes in filled pita breads. The company offers pita patters for sharing in the home or in workplaces, and also has outlets in Paris, Vienna and Ibiza. The following year, Greggs launched new lunchtime options based on Mediterranean flatbreads, inspired by street food cuisine. The flatbreads were launched in Mexican Chicken, Vegan Tandoori Chicken-Free and Chicken Shawarma varieties.

Other specialty breads from Middle Eastern countries which are finding favor in western markets include lavash (which is usually baked in a subterranean clay oven known as a tonir and features in cuisines such as Turkish, Iranian and Armenian), manakish (a Lebanese flatbread traditionally topped with olive oil and various other ingredients and eaten at breakfast) and Turkish varieties such as yufka and bazlama, the latter of which is usually cooked in an outdoor oven and has a light and fluffy texture similar to naan bread. •



Germans Love Their Bread the Most

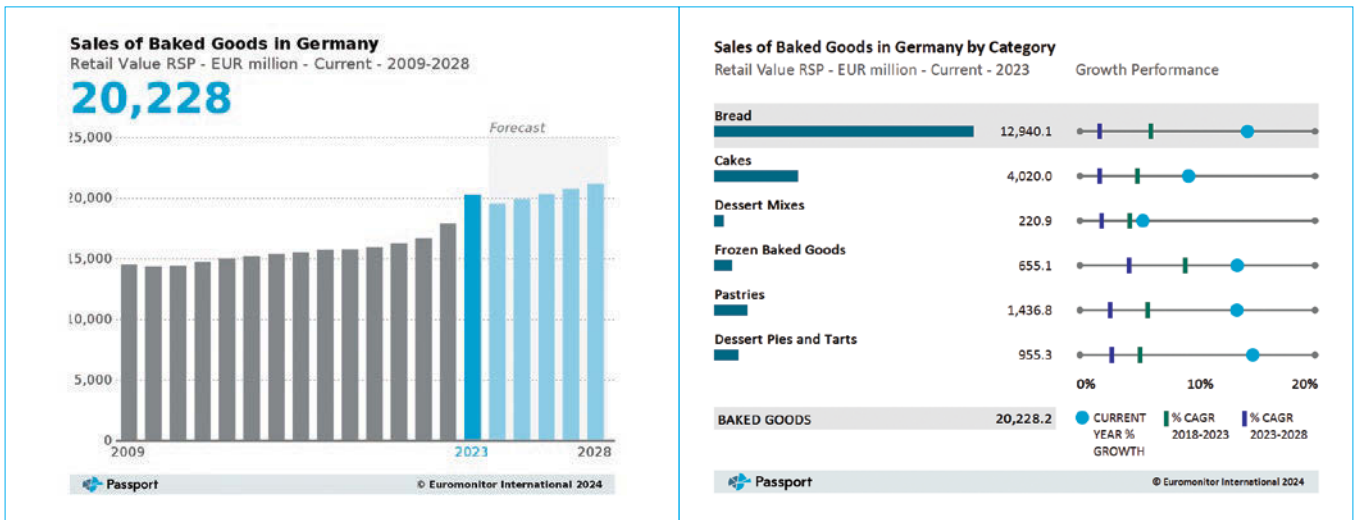
As the pandemic and its restrictions are more and more a distant memory, so are the habits that it brought into people's lives. In Germany, the bakery market is on the rise after the pandemic slump, and bread is its rising star.

By Jo Ilie



One of the largest bakery markets in Europe, Germany is facing the same challenges as other European countries. The post-pandemic, war-in-Europe world has brought on historic inflation, supply chain problems, workforce shortages, energy price increases and long lasting changes in lifestyle

The market analysts at Euromonitor International took all these changes into consideration when they looked at the forces influencing the market in the present and in the future. Their report offers an insight into what manufacturers and producers should take into account when developing marketing strategies and new product developments.



According to Euromonitor International, high ingredient and energy prices have had a significant impact on the production costs of baked goods in Germany. The German baking industry has been facing mounting challenges due to rising expenses. Ingredients such as flour, sugar, butter or eggs are vital components in the production of baked goods and fluctuations in their prices directly affect profit margins. Global factors, including climate change-related crop yield variations and supply chain disruptions, have led to increased costs for these essential ingredients in 2022 and 2023. In addition, energy prices play a crucial role in the baking industry. The energy-intensive nature of baking makes it highly vulnerable to fluctuations in energy costs, especially gas. These soaring costs ultimately translate into higher prices for consumers to some extent, affecting their purchasing decisions. To remain competitive, German baked goods producers must consider adopting more energy-efficient technologies and explore alternative ingredient sources over the coming years.

IN-STORE BAKERIES AVAILABLE IN SUPERMARKETS AND DISCOUNTERS

In 2023, in-store bakeries, a prominent feature of German supermarkets and discounters, were continuing to gain popularity, since they are often a compromise between traditional, independent bakeries and packaged bread from the supermarket. This growing trend is a continuation of a pattern that began several years ago, but gained additional momentum in 2022, with consumers in Germany increasingly turning to supermarkets and discounters for their baked goods, seeking to make prudent financial choices.

In this evolving landscape, which is heavily impacted by consumers having a higher cost of living, prominent leading players maintained their strong positions in packaged bread. These well-established companies have cultivated a reputation for quality and reliability over a long period in the German market. However, even as industrial bread production thrives, artisanal, traditionally crafted bread remains a formidable force, commanding a significant share of overall sales. This shifting consumer behavior represents a broader transformation in the way Germans source and enjoy baked goods, with affordability, convenience and diverse choices playing pivotal roles in shaping the future of baked goods.

BAKING-AT-HOME TREND IS DYING OFF IN GERMANY

In Germany, the once-enthusiastic trend of home baking is gradually losing its appeal among many that have tried it. During the initial stages of the COVID-19 pandemic, many Germans sought solace and creativity in their kitchens, experimenting with bread, pastries and cakes. However, this trend appears to be in decline, influenced by a multitude of factors. As life returns to normality, busier work schedules, a preference for convenience and the allure of ready-made options are causing the home-baking craze to wane. Conversely, this shift benefits local bakeries and baked goods in retail.

Market analysis based on data provided by Euromonitor International.



HIGHLIGHTS

- Retail value sales rise by 13% in current terms in 2023 to EUR20.2bn
- Bread is the best performing category in 2023, with retail value sales growing by 15% in current terms to EUR12.9bn



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Sirha Europain 2024: A Bread Blast!

The 2024 edition of Sirha Europain, which took place at Porte de Versailles in Paris from January 21 to 24, 2024, had a record number of participants and hosted two essential bakery and pastry competitions.

The 25th edition of Sirha Europain 2024 celebrated the French bakery and pastry industry. “A bread blast!,” as Luc Dubanchet described it, the Chief Commissioner and Director of Sirha Food. About 32,000 professionals, up 27% from the previous edition, were attracted by the show’s new focus on French Bakery and bakery catering. The show featured the Bakery World Cup, a major competition promoting the bakery profession worldwide, and the European Finals of the Pastry World Cup. It also included 70 masterclasses, roundtables, and competitions, as well as the products and services of exhibitors, brands, startups, entrepreneurial projects, and innovations. The event provided an opportunity for professionals to explore the various components of the bakery and pastry professions, including materials, equipment, technology, and services, as well as products and ingredients. Additionally, the event highlighted the importance of entrepreneurship, innovation, and technology in the industry, and it served as a platform for sharing knowledge and skills through national and international competitions. The return of the export sector, with 17% of exhibitors from outside France, proved that the show, operated by GL events, has once again become a global benchmark for the bakery and pastry sector, both in terms of offer

and content. This gave the 534 exhibitors and brands the opportunity to meet a highly qualified visitor base on the lookout for suppliers and solutions. The business generated by Sirha Europain confirmed its importance as a global, diverse meeting point for the industry. Sixteen years after its last victory, France - represented by Franck Fortier, Fabien Nolay and Xavier Sacriste - climbed to the top of the podium of the Bakery World Cup, the benchmark competition co-founded by Ekip, the Confédération Nationale de la BoulangeriePâtisserie Française (French Bakery and Pastry Confederation) and the Club des MOF boulangers (Best Bakery Craftspeople in France). On 23rd-24th January, Sirha Europain and the French Schools Cup were the place to be when it came to transferring knowledge to the budding younger generations. Les Compagnons du Devoir (Craft Companions) from Tours and the Compagnons du Devoir from Nîmes took first place in the “Most Espoirs” and “Excellence” categories respectively. On the same day, the French team also won the European Selection of the Pastry World Cup. Haruka Atsuji and Jérémy Massing earned their place at the Grand Final to be held in January 2025 during Sirha Lyon, alongside teams from Italy, the UK, Sweden, Switzerland and Belgium.

The next edition of Sirha Europain will take place in Paris in January 2026. •

2024 FEATURE PLANNING

1

JANUARY/FEBRUARY

Anuga FoodTec Special Edition

Ad closing: Feb 14/Publishing: Feb 29

TECHNOLOGY

Sheeters & Laminators / Smart Bakery Systems

PROCESS

Designing & Commissioning / Production Lines / Cutting and Forming / Scoring

SPECIAL FEATURE

Boosting Productivity

EXPERT VIEW

Low Pressure / Extruded Snacks

FOOD SAFETY

Hygienic Equipment Design

INGREDIENTS & NUTRITION

Flours / Shelf-life Optimization / Botanicals / CBD

PACKAGING

Secondary packaging

MARKETS

Germany

SNACKING TRENDS

Expanded / Extruded / Snacks

CRAFT BAKING

Freezers, Display Freezers & Coolers

SUPPLY CHAIN & LOGISTICS

Storage & Warehouse Management

PRODUCT SPOTLIGHT

Pizza / Laminated Dough-based Innovation

TRADE SHOWS

AB Tech Expo, Sirha European, Pro Sweets + ISM

2

MARCH/APRIL

Includes Asia Pacific Overview
Print Supplement

Ad closing: Mar 28/Publishing: Apr 14

TECHNOLOGY

Conveyor Belts, Topping / Filling / Glazing

PROCESS

Inspection & Monitoring / Product Diversification

SPECIAL FEATURE

Energy Saving & Process Optimization

EXPERT VIEW

Sustainable Packaging Materials

FOOD SAFETY

Sanitation & Allergen Management

INGREDIENTS & NUTRITION

Oils & Fats / Flavors & Colors / Water

PACKAGING

Packaging Automation

MARKETS

UK & Ireland

SNACKING TRENDS

Savory vs Sweet Biscuits

CRAFT BAKING

Kneaders & Mixers

SUPPLY CHAIN & LOGISTICS

Traceability

PRODUCT SPOTLIGHT

Traditional Bakery & Ethnic Sweets / Pies & Tarts

TRADE SHOWS

Food Expo Greece, Pizza Expo, IFE, Anufood China, SIGEP China

3

MAY/JUNE

SnackEx Special Edition

Ad closing: May 14/Publishing: May 28

TECHNOLOGY

Turnkey Lines / Software & Sensors

PROCESS

Vacuum Cooling / Seasoning

SPECIAL FEATURE

Smart Production & Industry 4.0

EXPERT VIEW

Efficient Product Transport: Conveying Systems

FOOD SAFETY

Trainings and Program Implementation

INGREDIENTS & NUTRITION

Plant-based Bakery / Enzymes / Free-from Alternatives

PACKAGING

Packaging Design

MARKETS

Scandinavia

SNACKING TRENDS

Pies & Cakes

CRAFT BAKING

Dividers / Rounders

SUPPLY CHAIN & LOGISTICS

Supply Chains & NPD

PRODUCT SPOTLIGHT

Plant-based Bakery Products / Cookies

TRADE SHOWS

Food and Drink Expo, Thaifex - Anuga Asia

4

JULY/AUGUST

Includes Middle East Overview
Print Supplement

Ad closing: July 11/Publishing: July 28

TECHNOLOGY

Freezing Equipment / Extruders

PROCESS

Depositing / Mixing & Hydrating Ingredients

SPECIAL FEATURE

Sustainability: Challenges & Outcomes

EXPERT VIEW

Oils, Fats & Dough Rheology

FOOD SAFETY

Certifications, Regulations & Compliance

INGREDIENTS & NUTRITION

Dough Improvers / Inclusions / Pulses / DRI & EU regulations

PACKAGING

Sustainable Materials

MARKETS

Spain & Portugal

SNACKING TRENDS

Sandwich Breads / Flatbreads

CRAFT BAKING

Deck and Rack Ovens

SUPPLY CHAIN & LOGISTICS

Handling & Transport

PRODUCT SPOTLIGHT

Donuts / Cakes

5

SEPTEMBER/OCTOBER

Includes North America Overview
Print Supplement

Ad closing: Sept 19/Publishing: Oct 03

TECHNOLOGY

New Oven Technologies

PROCESS

Extrusion / Handling / Pick & Place

SPECIAL FEATURE

Product Quality Management

EXPERT VIEW

Plant-based Formulation & Production

FOOD SAFETY

IoT in Food Safety Management

INGREDIENTS & NUTRITION

Sweeteners / Emulsifiers / Antioxidants

PACKAGING

Robots / Cobots

MARKETS

Italy

SNACKING TRENDS

Enrobed / Filled Sweets

CRAFT BAKING

Pastry Equipment

SUPPLY CHAIN & LOGISTICS

Cold Chain

PRODUCT SPOTLIGHT

Frozen Pastry / Sourdough Bread

TRADE SHOWS

Fi Asia, Pack Expo

6

NOVEMBER/DECEMBER

Fi Europe Special Edition

Ad closing: Oct 29/Publishing: Nov 12

TECHNOLOGY

Dough Dividers/ Rounders, Mixers & Kneaders

PROCESS

Conveying / Hygiene & Sanitation

SPECIAL FEATURE

Sustainable Sourcing of Ingredients

EXPERT VIEW

Pans, Trays, Racks & Bakeware

FOOD SAFETY

Process, Product & Staff Protection

INGREDIENTS & NUTRITION

Yeast & Sourdough / Proteins & Fibers / Starches

PACKAGING

Active Packaging

MARKETS

France

SNACKING TRENDS

Wafers

CRAFT BAKING

Small Footprint Technology

SUPPLY CHAIN & LOGISTICS

Software Solutions

PRODUCT SPOTLIGHT

Winter Holiday Treats / Meringues

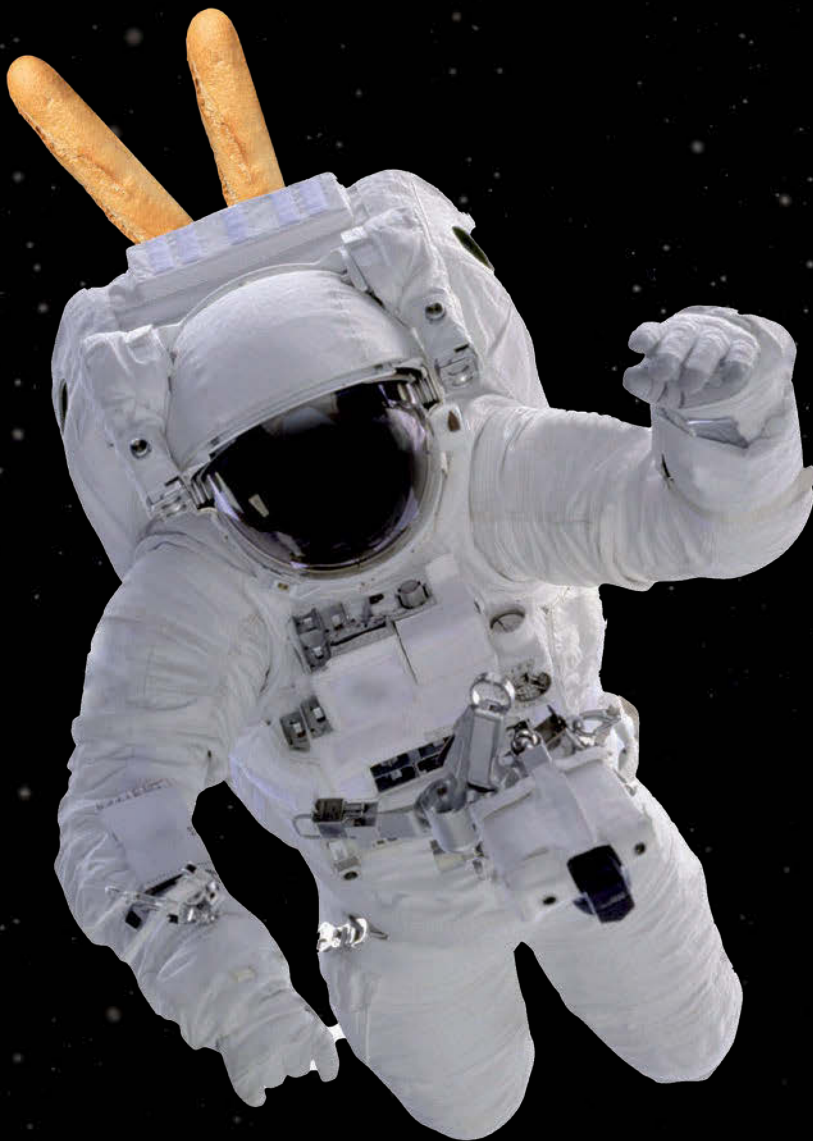
TRADE SHOWS

Free From Functional Food Expo / Health Ingredients.
Gulfood Manufacturing



THE BAKERY OF THE FUTURE

solutions for generations to come



space brings endless opportunities

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