



Passport

Baked Goods in Bolivia

Euromonitor International

December 2021

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purposes only.

Some content and data have been
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BAKED GOODS IN BOLIVIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Unpackaged flat bread returns to stability after dynamic growth in 2020

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Consumers indulge in cakes and pastries as COVID-19 measures ease

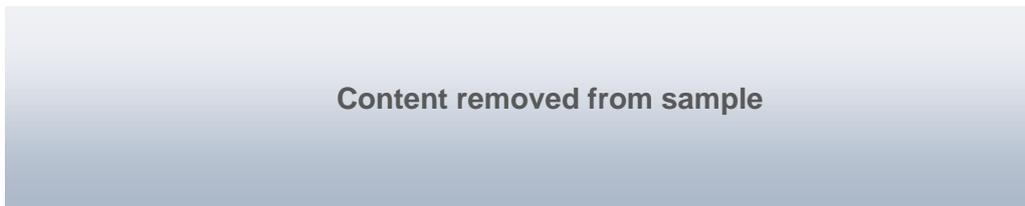
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La Francesca responds to change in shopping behaviour

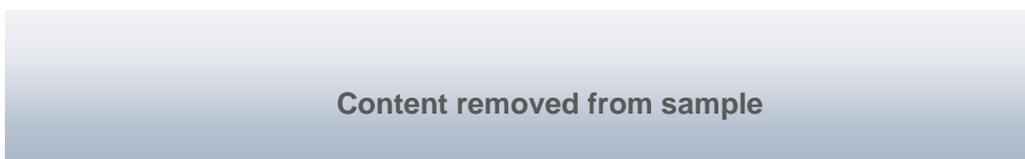
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PROSPECTS AND OPPORTUNITIES

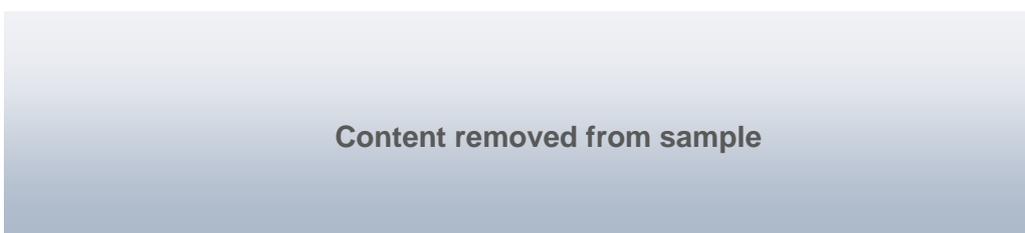
Bread approaching maturity



Growing hunger for Mexican food could benefit sales of flat bread



Home-made tastes better to many



CATEGORY DATA

Table 1 Sales of Baked Goods by Category: Volume 2016-2021

'000 tonnes

	2016	2017	2018	2019	2020	2021
Baked Goods	Data removed from sample					
Bread						
- Flat Bread						
-- Packaged Flat Bread						
-- Unpackaged Flat Bread						
- Leavened Bread						
-- Packaged Leavened Bread						
-- Unpackaged Leavened Bread						
Cakes						
- Packaged Cakes						
- Unpackaged Cakes						
Dessert Mixes						
Frozen Baked Goods						

- Pastries
- Packaged Pastries
- Unpackaged Pastries

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Baked Goods by Category: Value 2016-2021

BOB million

	2016	2017	2018	2019	2020	2021
Baked Goods	Data removed from sample					
Bread						
- Flat Bread						
-- Packaged Flat Bread						
-- Unpackaged Flat Bread						
- Leavened Bread						
-- Packaged Leavened Bread						
-- Unpackaged Leavened Bread						
Cakes						
- Packaged Cakes						
- Unpackaged Cakes						
Dessert Mixes						
Frozen Baked Goods						
Pastries						
- Packaged Pastries						
- Unpackaged Pastries						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Baked Goods by Category: % Volume Growth 2016-2021

% volume growth

	2020/21	2016-21 CAGR	2016/21 Total
Baked Goods	Data removed from sample		
Bread			
- Flat Bread			
-- Packaged Flat Bread			
-- Unpackaged Flat Bread			
- Leavened Bread			
-- Packaged Leavened Bread			
-- Unpackaged Leavened Bread			
Cakes			
- Packaged Cakes			
- Unpackaged Cakes			
Dessert Mixes			
Frozen Baked Goods			
Pastries			
- Packaged Pastries			
- Unpackaged Pastries			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Baked Goods by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Baked Goods	Data removed from sample		
Bread			
- Flat Bread			
-- Packaged Flat Bread			
-- Unpackaged Flat Bread			
- Leavened Bread			
-- Packaged Leavened Bread			
-- Unpackaged Leavened Bread			
Cakes			
- Packaged Cakes			
- Unpackaged Cakes			
Dessert Mixes			
Frozen Baked Goods			
Pastries			
- Packaged Pastries			
- Unpackaged Pastries			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 NBO Company Shares of Baked Goods: % Value 2017-2021

% retail value rsp	2017	2018	2019	2020	2021
Company	Data removed from sample				

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Baked Goods: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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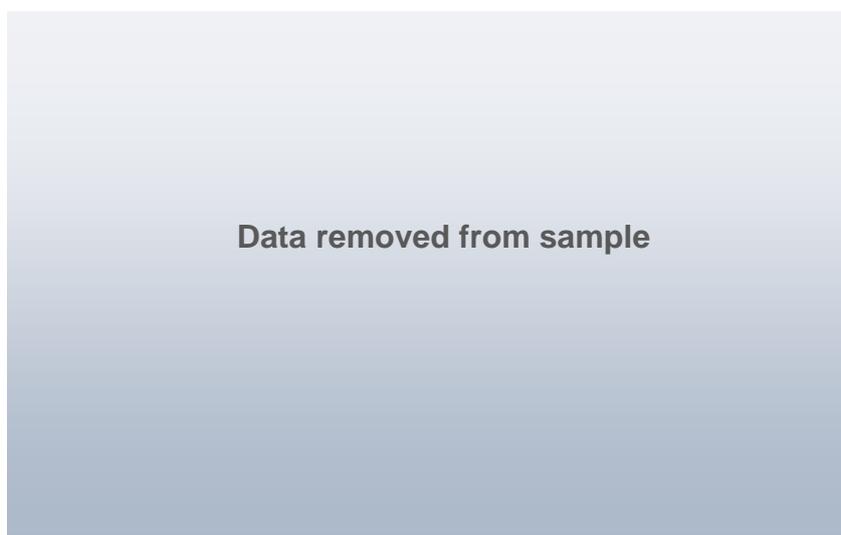


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Distribution of Baked Goods by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
--------------------	------	------	------	------	------	------

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Food/drink/tobacco specialists
- Independent Small Grocers
- Other Grocery Retailers
- Non-Grocery Specialists



- Health and Beauty Specialist Retailers
- Other Foods Non-Grocery Specialists
- Mixed Retailers
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Forecast Sales of Baked Goods by Category: Volume 2021-2026

'000 tonnes

	2021	2022	2023	2024	2025	2026
Baked Goods	Data removed from sample					
Bread						
- Flat Bread						
-- Packaged Flat Bread						
-- Unpackaged Flat Bread						
- Leavened Bread						
-- Packaged Leavened Bread						
-- Unpackaged Leavened Bread						
Cakes						
- Packaged Cakes						
- Unpackaged Cakes						
Dessert Mixes						
Frozen Baked Goods						
Pastries						
- Packaged Pastries						
- Unpackaged Pastries						

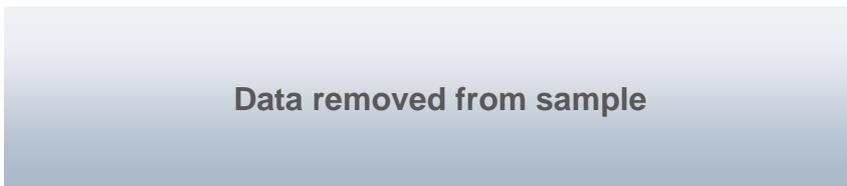
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 9 Forecast Sales of Baked Goods by Category: Value 2021-2026

BOB million

	2021	2022	2023	2024	2025	2026
Baked Goods	Data removed from sample					
Bread						
- Flat Bread						
-- Packaged Flat Bread						
-- Unpackaged Flat Bread						
- Leavened Bread						
-- Packaged Leavened Bread						
-- Unpackaged Leavened Bread						
Cakes						
- Packaged Cakes						

- Unpackaged Cakes
- Dessert Mixes
- Frozen Baked Goods
- Pastries
- Packaged Pastries
- Unpackaged Pastries



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Sales of Baked Goods by Category: % Volume Growth 2021-2026

% volume growth

	2021/22	2021-26 CAGR	2021/26 Total
Baked Goods	Data removed from sample		
Bread			
- Flat Bread			
-- Packaged Flat Bread			
-- Unpackaged Flat Bread			
- Leavened Bread			
-- Packaged Leavened Bread			
-- Unpackaged Leavened Bread			
Cakes			
- Packaged Cakes			
- Unpackaged Cakes			
Dessert Mixes			
Frozen Baked Goods			
Pastries			
- Packaged Pastries			
- Unpackaged Pastries			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales of Baked Goods by Category: % Value Growth 2021-2026

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Baked Goods	Data removed from sample		
Bread			
- Flat Bread			
-- Packaged Flat Bread			
-- Unpackaged Flat Bread			
- Leavened Bread			
-- Packaged Leavened Bread			
-- Unpackaged Leavened Bread			
Cakes			
- Packaged Cakes			
- Unpackaged Cakes			
Dessert Mixes			
Frozen Baked Goods			
Pastries			
- Packaged Pastries			
- Unpackaged Pastries			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

STAPLE FOODS IN BOLIVIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Staple foods in 2021: The big picture

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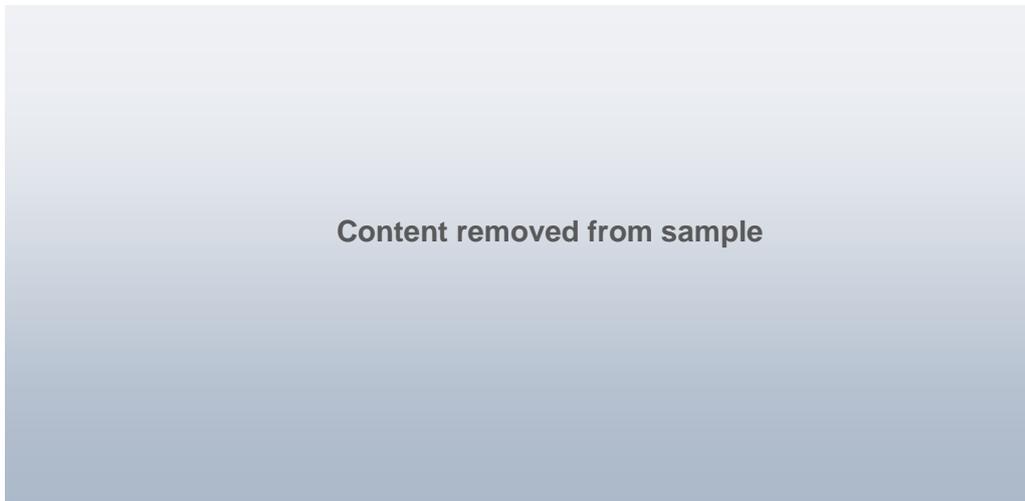
Key trends in 2021

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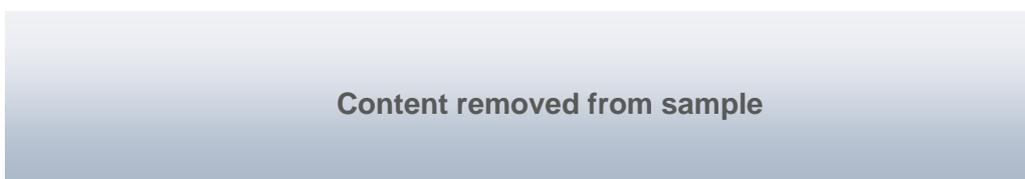
Competitive Landscape

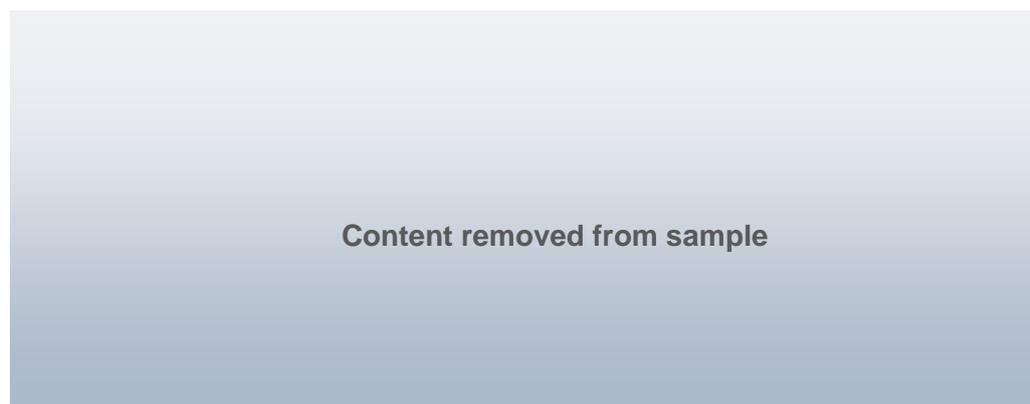


Channel developments



What next for staple foods?





MARKET DATA

Table 12 Sales of Staple Foods by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Baked Goods Breakfast Cereals Processed Fruit and Vegetables Processed Meat, Seafood and Alternatives to Meat Rice, Pasta and Noodles	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Sales of Staple Foods by Category: Value 2016-2021

BOB million	2016	2017	2018	2019	2020	2021
Baked Goods Breakfast Cereals Processed Fruit and Vegetables Processed Meat, Seafood and Alternatives to Meat Rice, Pasta and Noodles	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Sales of Staple Foods by Category: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Staple Foods	Data removed from sample		

Baked Goods
 Breakfast Cereals
 Processed Fruit and Vegetables
 Processed Meat, Seafood and
 Alternatives to Meat
 Rice, Pasta and Noodles

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Sales of Staple Foods by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Staple Foods	Data removed from sample		
Baked Goods			
Breakfast Cereals			
Processed Fruit and Vegetables			
Processed Meat, Seafood and Alternatives to Meat			
Rice, Pasta and Noodles			

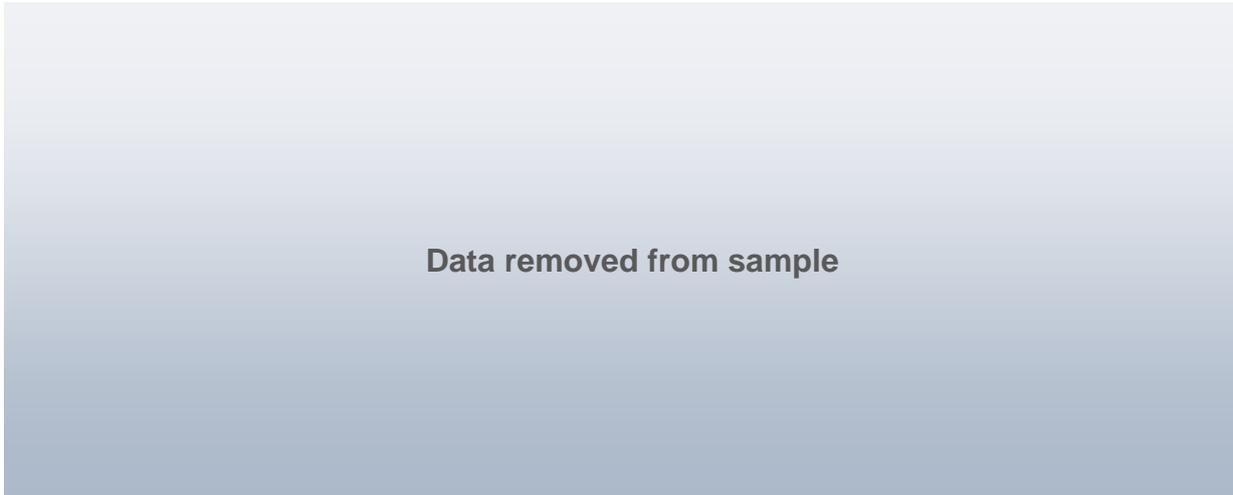
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 NBO Company Shares of Staple Foods: % Value 2017-2021

% retail value rsp

Company	2017	2018	2019	2020	2021
Data removed from sample					

Data removed from sample

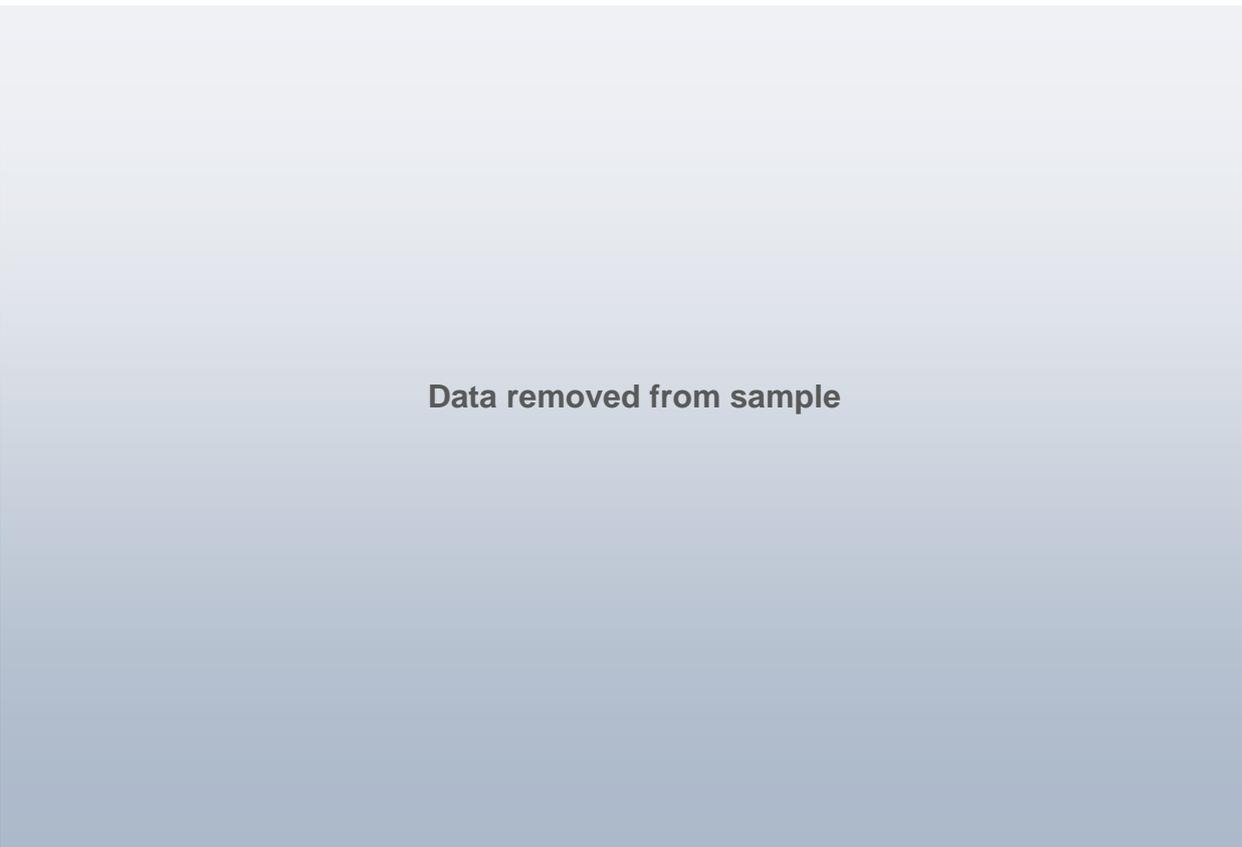


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 LBN Brand Shares of Staple Foods: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------





Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 Penetration of Private Label by Category: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Baked Goods	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Distribution of Staple Foods by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco						

- specialists
- Independent Small Grocers
- Other Grocery Retailers
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Other Foods Non-Grocery Specialists
- Mixed Retailers
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Forecast Sales of Staple Foods by Category: Volume 2021-2026

'000 tonnes

	2021	2022	2023	2024	2025	2026
Baked Goods	Data removed from sample					
Breakfast Cereals						
Processed Fruit and Vegetables						
Processed Meat, Seafood and Alternatives to Meat						
Rice, Pasta and Noodles						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Staple Foods by Category: Value 2021-2026

BOB million

	2021	2022	2023	2024	2025	2026
Baked Goods	Data removed from sample					
Breakfast Cereals						
Processed Fruit and Vegetables						
Processed Meat, Seafood and Alternatives to Meat						
Rice, Pasta and Noodles						

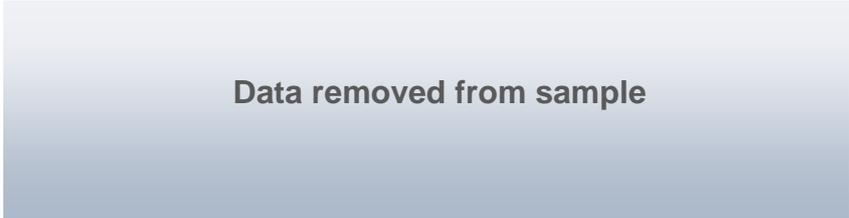
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Staple Foods by Category: % Volume Growth 2021-2026

% volume growth

2021/22 2021-26 CAGR 2021/26 Total

Staple Foods
 Baked Goods
 Breakfast Cereals
 Processed Fruit and Vegetables
 Processed Meat, Seafood and
 Alternatives to Meat
 Rice, Pasta and Noodles



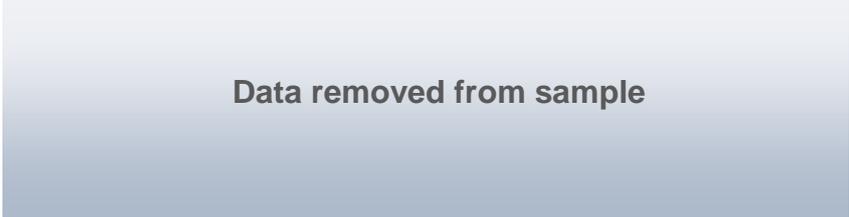
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Staple Foods by Category: % Value Growth 2021-2026

% constant value growth

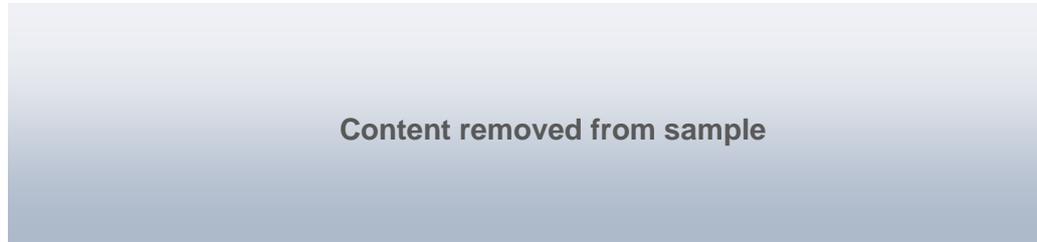
2021/2022 2021-26 CAGR 2021/26 Total

Staple Foods
 Baked Goods
 Breakfast Cereals
 Processed Fruit and Vegetables
 Processed Meat, Seafood and
 Alternatives to Meat
 Rice, Pasta and Noodles



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

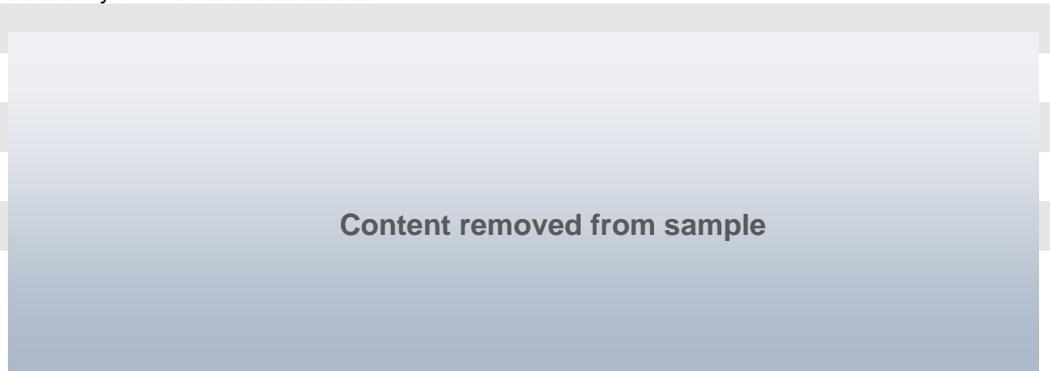
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SOURCES

Sources used during research include the following:

Summary 1 Research Sources



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Source: Euromonitor International