



Sweet ambition

Growing sweet bakery opportunities
in Out-of-Home (Ireland)





Sweet talk

Sweet bakery remains a well-established and evolving category within Ireland's out-of-home (OOH) food landscape. This report explores current consumer preferences, habits, and expectations, offering insight into how operators can adapt their strategies for 2025 and beyond.

Consumers increasingly view sweet bakery items as a way to enjoy moments throughout the day. Lunchtime has emerged as the most popular time for these purchases, although sweet baked goods continue to play a role across all dayparts, including breakfast, afternoon snacking, and after-dinner occasions.

The most common motivations for purchasing sweet bakery are to treat oneself and to enjoy something sweet. These motivators are particularly strong among older age groups.

Consumer preferences show clear generational and gender-based patterns. Doughnuts are especially popular among 35-44-year-olds, while croissants appeal more to women and older consumers. Versatile items such as cookies and biscuits are enjoyed throughout the day, while cheesecake leads as a favourite after-dinner option.

Freshness and quality remain top priorities, with Irish consumers associating freshly baked goods with better value.

Supermarkets dominate sweet bakery sales, with consumers preferring in-store bakeries followed by packaged sections. Independent bakeries and cafés also play a key role, especially for those seeking a more artisanal experience. While quick-service and workplace options are currently underutilised, they

present a strong opportunity for growth, particularly by offering convenient, high-quality selections.

Visual appeal is another powerful driver of purchase decisions, cited as important by most consumers. Presentation, portion size, and portability are all significant factors that influence where and what people choose.

Sweet bakery is enjoyed in a variety of social settings, with the popular option being shared with family.

Sustainability continues to grow in importance and consumers prioritise locally sourced ingredients, as well as sustainable packaging.

Lastly, brand recognition is a major driver of purchasing decisions, especially OOH. Just over half of Irish consumers say they are more likely to choose a sweet bakery item from a familiar brand, rising to almost three quarters among frequent buyers.

We hope this report provides OOH operators with useful insights to help capitalise on the enduring popularity of sweet bakery and meet the expectations of today's consumers.



Josh Lewis
Desserts Category Lead
Nestlé Professional

Sweet disposition: Understanding the treat mindset in 2025

Treating and pausing for a moment of joy in an otherwise busy day is a key part of sweet bakery in 2025. Consumers enjoy treats in different settings and in Ireland, the lunchtime occasion is most popular as people look to make the most of a break during their working day.

Almost two thirds (61%) of consumers link freshness with value, saying that when a sweet treat is freshly baked in store, it offers good value for money. This ties into the popularity of in-store bakeries, which we will explore further into the report.

The most common reasons Irish consumers buy sweet baked goods are to treat themselves (38%) and to satisfy a desire for something sweet (also 38%). A moment of joy follows closely, cited by just over a quarter (27%) as their main reason. The desire for a treat rises to 48% among those aged 45-54.

During inflationary times consumers are more willing to choose familiar and trusted brands, as well as flavours they find comforting, demonstrating that it's key to keep a good selection of known and trusted favourites.

As we'll explore, sharing sweet bakery with the family is also a top trend among Irish consumers.

Meanwhile, more than a third (34.4%) of Irish consumers say a unique or interesting flavour would make them try a new sweet baked good, highlighting room for innovation.



National treasures: The nation's favourite bakes

Sweet bakery preferences in Ireland show generational and gender differences, and understanding these nuances can help brands and operators tailor offerings more effectively

Doughnuts lead the pack among younger-middle-aged consumers, with 46% of those aged 35-44 saying it's their go-to sweet bakery item when buying something enjoyable. That compares to 29% of 25-34-year-olds, suggesting an increase in doughnut preference as consumers move into peak family and working life stages, potentially driven by a desire for familiar, nostalgic options that deliver on both flavour and satisfaction.

Meanwhile, croissants resonate slightly more with women, with a third (33%) of female respondents naming them their go-to item, compared to 29% of men. This hints at the importance of variety and versatility, especially for formats like croissants that can straddle breakfast, brunch, and snacking occasions.

Quality of ingredients and freshness come out on top when it comes to why people buy sweet treats from

certain places, with 37% of consumers saying it's important.

Price was cited by 36% of treaters as a reason they buy sweet bakery from a particular location, while 21% referenced convenience, such as travel or on-the-go friendly packaging.

This balance of perceived freshness, affordability, and accessibility is driving shopper decisions and underscores the continued relevance of both fresh bakery counters and well-presented packaged solutions.

Looks are important

83%

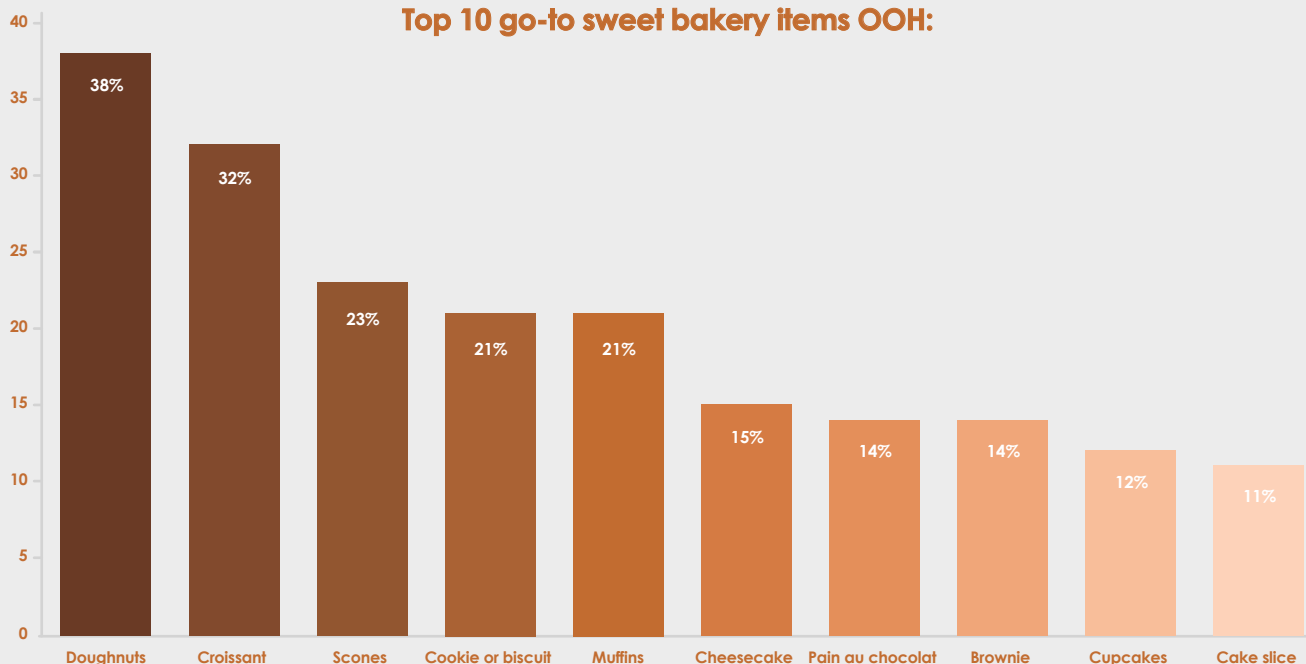
of Irish consumers say that visual appearance is important in their decision to purchase sweet treats.



This rises to 92% among those who eat sweet bakery OOH once a month, and 91% among those aged 55+.

In fact, only 2% of consumers say visual appearance isn't important.

Top 10 go-to sweet bakery items OOH:



Time and place: When and where people enjoy sweet bakery

Sweet bakery holds a place in the regular routines of Irish consumers, with lunchtime emerging as a particularly popular moment to enjoy a treat. While these moments of joy are also commonly chosen as mid-morning or afternoon snacks, their appeal stretches across the day, from breakfast through to dessert after dinner.

Consumer habits are shifting, and while lunchtime is a popular occasion, it's worth noting that afternoon snacking is becoming increasingly popular, as people look for a treat or a pause in their day.

These evolving habits highlight how sweet bakery products continue to adapt to the flexible, on-the-go lifestyles of today's consumers.

Croissants remain a breakfast favourite in Ireland, especially among women and older age groups, who are more likely to start their day with this classic pastry. Their association with the morning makes them a familiar choice to accompany a coffee or tea.

Cookies and biscuits, meanwhile, show strong versatility. Enjoyed throughout the day, they're just as likely to appeal as a permissible afternoon treat as they are a late-night bite or a simple dessert after dinner. Their broad appeal reinforces their place as a go-to option for any snacking moment.



Top items for each time of day:

Breakfast



28%
croissants

Lunch



15%
doughnuts

Afternoon



25%
doughnuts

After Dinner Dessert



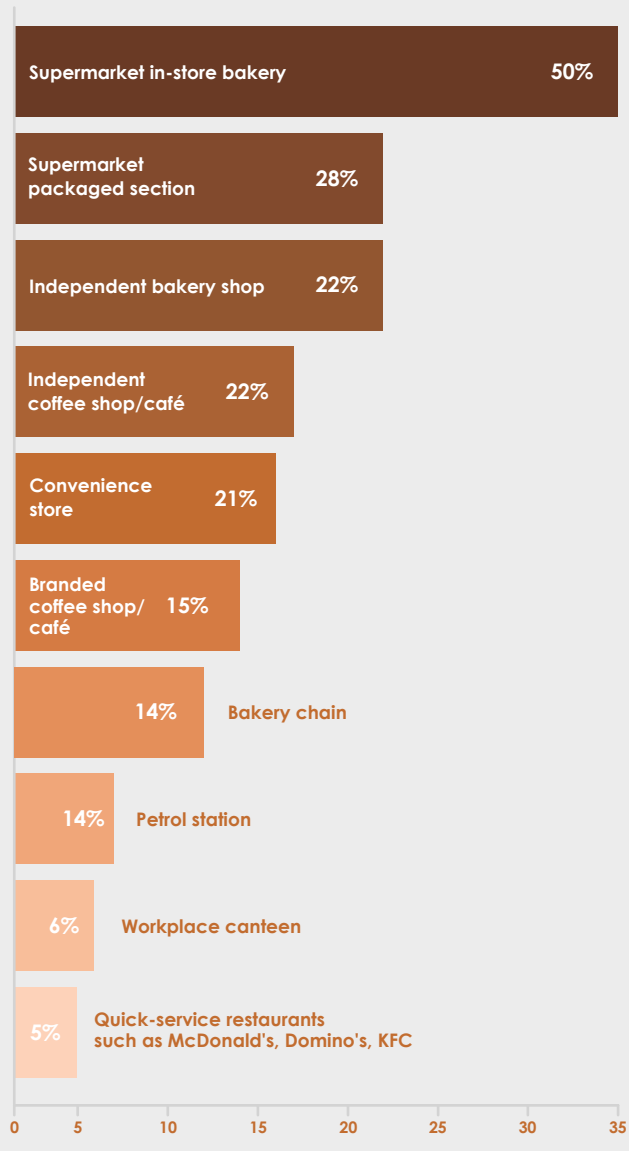
17%
cheesecake

Evening Snack



11%
cookie or biscuits

Top channels for sweet bakery purchases:



"OOH operators should recognise the valuable role that supermarkets and bakery chains play in the sweet bakery market. Their popularity highlights how important ease and convenience are for consumers when choosing where to pick up a treat."

"It's also interesting to note that shopper habits are evolving – consumers are expanding their repertoires and exploring a wider range of sweet bakery products, from cookies and croissants to muffins and scones. This broader interest is spreading purchase frequency across multiple categories."

"There's also a clear opportunity for workplace cafés to expand their offering and recapture spend that may be going elsewhere. By recreating elements of the High Street experience, operators can appeal to those seeking to pause for a treat during their work day."

Irene Ferre, Insights Lead
Nestlé Professional

Go-to for OOH purchases

When it comes to picking up sweet bakery goods outside the home, Irish consumers tend to turn first to the supermarket's in-store bakery.

Half of those who buy sweet bakery items as a treat typically purchase them from the supermarket in-store bakery, while 28% purchase from the supermarket packaged section. These convenient spots are popular across many regions, with Munster leading the way in preference.

Independent bakery shops and cafés also play an important role, offering a more artisanal or local experience, while packaged options on supermarket shelves remain a strong alternative for those seeking grab-and-go convenience.

Retail continues to be a major driver of sweet bakery sales, with supermarket and grocery channels contributing significantly to the category's overall value. While bakery chains, branded coffee shops and forecourts also have their place in the mix, it's clear that retail outlets still dominate, particularly among older age groups: 42% of those aged 45–54 buy from supermarket in-store bakeries, compared to 28% of 25–34-year-olds.





Solo treat or shared delight: Why consumers buy sweet bakery

Whether it's a croissant and a coffee to start the day or a shared cake after dinner to end it, sweet bakery plays a valued role across different occasions.

According to our findings, 38% say they buy sweet baked goods simply to enjoy a treat, while another 38% choose them when they're in the mood for something delicious.

A further 27% say sweet bakery is a treat they choose when they want to add a little lift to their day, making it the third most common motivator overall.

Among those who enjoy sweet bakery OOH, 39% say their reason is about enjoying something tasty in the moment. This rises among older age groups, with 48% of 45–54-year-olds saying they choose sweet baked goods to mark a positive moment for themselves.

In terms of who Irish consumers enjoy sweet bakery with, 44% say they often share treats with family, while a quarter say they share with a partner. Only 15% share

most often with friends, and just 9% say they don't usually share sweet bakery with anyone.

Whether it's part of a social setting or a quiet moment alone, sweet bakery remains a popular choice for a wide range of everyday experiences, and products that offer portion control, portability, and variety are best placed to align with these evolving habits.

"Pre-portioned bakery products can play a key role in supporting the sharing trend, with options such as pre-sliced cakes, muffin assortments and doughnut boxes ideal for family occasions and portion control." "Irish consumers also enjoy sweet treats 'in the moment', making individually packaged items that are convenient and easy to pick up and enjoy essential to an operator's offering."

Josh Lewis, Desserts Category Lead
Nestlé Professional



Sweet sustainability: Understanding ethics & green credentials

Sustainability matters to Irish consumers, and it's becoming an increasingly important factor in their food choices. In the sweet bakery category, this is particularly evident and some 42% of shoppers prioritise locally sourced ingredients, while nearly 40% place value on sustainable packaging, which includes recyclable and plastic-free options.

These figures highlight a clear focus of expectations: provenance and planet-friendly practices are no longer just nice-to-haves; they're becoming essential. Brands and operators that align with these values are more likely to build trust and loyalty among today's more environmentally conscious shoppers.



TOP TIP

"Highlight sustainable credentials such as the origins of cocoa and coffee. Ask your supplier for information and educational stories that you can share with your team and customers."

"If you offer hot drinks, consider offering a deal on sweet bakery for those customers who bring reusable coffee cups."

"For many consumers, plant-based options also come under the sustainability umbrella. Try introducing plant-based alternatives through samples and promotions."

"Look for sustainable packaging options or brands that offer sustainable, recyclable packaging solutions."

"Check the all-round sustainability credentials of the brands you stock."

Irene Ferre, Insights Lead
Nestlé Professional

Brand power: Trusted names & consumer gains

49% of Irish consumers found Nestlé branded sweet bakery products most appealing when purchasing OOH.

Brand recognition continues to be a key factor in how Irish consumers choose sweet bakery products, particularly when buying out of home. Just over half (51%) of shoppers say that seeing a familiar brand name they know and trust influences their purchasing decisions, underlining the important role brands play in shaping choices.

This connection is even stronger among frequent treaters. A notable 73% of those who enjoy sweet bakery items out of home 2-6 times per week say brand familiarity matters, clearly linking brand recognition with satisfaction and loyalty.

Certain sweet bakery formats show even stronger associations with branding. For example, 39% of consumers are more likely to choose a branded product when it comes to cookies or biscuits, and it's a similar story for doughnuts. These are categories where flavour, quality and trust in the brand are key drivers.

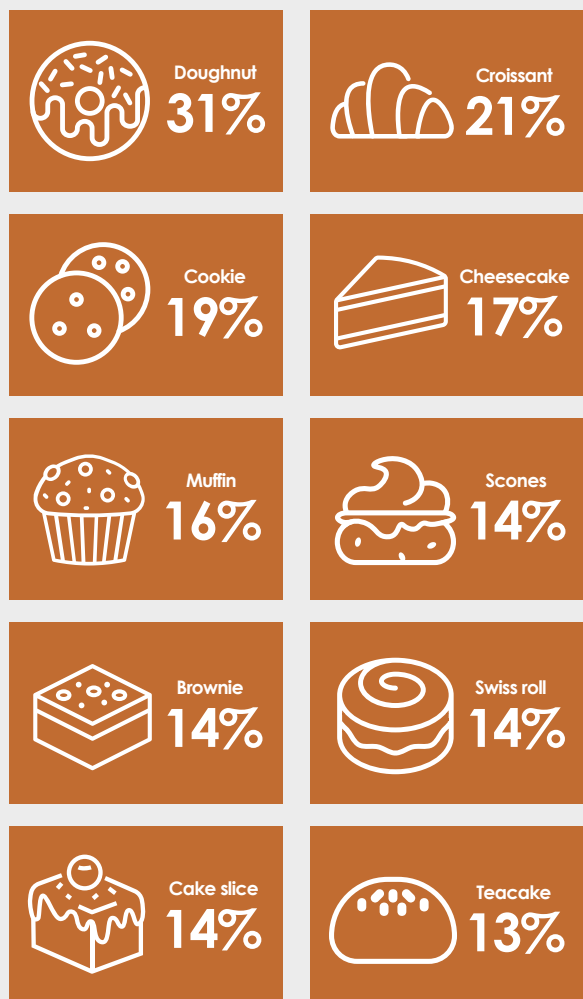
Older middle-aged consumers show strong levels of brand loyalty. For instance, 37% of those aged 45–54 are more likely to opt for branded sweet bakery products, compared to 26% of 25–34s and 29% of over-55s. This trend is especially evident in traditional formats such as cookies, biscuits, and cakes, where brand cues and perceived quality have a bigger influence on buying behaviour.

While younger audiences may be more open to trying new trends or limited-edition products, older age groups enjoy established brands, making them ideal consumers for classic product ranges and premium branded lines.

There's also some appetite for innovation, with 22% of Irish consumers expressing interest in seeing more branded collaborations in sweet bakery. This presents a valuable opportunity for operators and manufacturers to explore partnerships that combine familiarity with novelty.



The top ten branded treat choices:





Key Takeaways

Optimise for all-day occasions: From breakfast croissants to evening cookies, align product offerings with key treating moments.

Leverage visual appeal and packaging: Eye-catching presentation and on-the-go formats are essential in capturing spontaneous purchases.

Prioritise sustainability: Align with consumer values by sourcing responsibly and using eco-friendly packaging.

Strengthen branded offerings: Well-known names build trust, especially among older and more frequent buyers.

Balance familiarity and innovation: Maintain a strong core range of trusted products while introducing new flavours to attract curiosity.

Target key demographics with tailored messaging: Understand the nuanced preferences across age and gender groups.

Unlock underused channels with curated offerings:

With workplace cafés and forecourts currently underleveraged, there's an opportunity to boost visibility and sales by offering compact, high-quality selections in these settings, especially formats that balance freshness, portion control, and convenience.

Enhance the experience with pairing opportunities:

Create value by bundling sweet bakery items with popular beverages. Highlight these pairings to drive spend and encourage repeat purchases.

Keep it sweet:

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