

Sweet ambition

Growing sweet bakery opportunities in Out-of-Home

Nestlé PROFESSIONAL



Sweet talk

Sweet bakery such as cookies, doughnuts, and muffins continues to enjoy widespread appeal across demographics. These treats are increasingly integrated into consumer routines, particularly during the afternoon, which has now overtaken lunch as the most popular time for consumption.

Whether it's a cookie paired with coffee, or a pastry enjoyed in a quieter setting, there are several trends shaping demand for both product innovation and new formats.

Flavour exploration and nutritional innovations are playing a larger role. Consumers are actively seeking variety, including new flavour profiles, plant-based options, and lower-sugar formulations.

At the same time, versatility is key and products that work well for both individual portions and sharing occasions are seeing increased traction. This is key in light of the trend towards more people enjoying sweet bakery at home.

While cookies remain a category leader, muffins and doughnuts are gaining momentum, especially when aligned with broader food trends such as visual innovations.

Retail channels are seeing renewed energy, with people seeking sweet bakery items that are easy to enjoy at home or on the go. At the same time, cafés and bakeries remain important destinations, particularly for those looking to pair their treat with a bit of atmosphere or comfort – something other businesses could look to replicate.

Importantly, trust and values matter more than ever. Consumers are seeking out familiar brands that offer reliable quality, taste and choice. This is especially true among the younger demographic, for whom branded snacks hold particular appeal.

Consumer expectations around sourcing and ethics are also increasing. Many are paying closer attention to how products are made, favouring brands with transparent sourcing practices and sustainable packaging.

For operators, understanding when and how people consume sweet bakery can unlock new areas for growth. By offering products that reflect current tastes, values, and usage patterns, operators can build stronger relevance in a competitive category.

We hope this report inspires new opportunities in sweet bakery for your business.

Sweet bakery by numbers

£2.7b
value
(up 10.3%)

1.5b
volume in packs
(up 3.7%)

39.8m
shoppers

28
trips per year

→

£2.47
spend per trip



Josh Lewis
Desserts Category Lead
Nestlé Professional

Sweet disposition: Understanding the treat mindset in 2025

Treating as part of a moment of joy continues to resonate strongly with consumers, particularly in out-of-home (OOH) settings. Sweet bakery items are increasingly viewed not just as treats, but as purposeful occasions woven into regular routines. Whether chosen as a tasty interlude or a tasty treat these occasions reflect a deeper connection to sweet bakery.



Almost three in 10 (28%) consumers who have eaten a sweet bakery item OOH in the last 30 days say their main reason for making the purchase is to help brighten their day.

Just over a quarter (26%) of consumers who eat a sweet bakery item OOH once a week have done so to satisfy their appetite for something sweet, while a quarter enjoy sweet bakery as a treat.



This evolving consumer mindset highlights the category's ability to meet consumer needs. Sweet bakery has become a go-to choice for those seeking a sense of enjoyment, or a brief pause in an otherwise busy day, positioning it as a powerful tool for operators looking to align with modern lifestyle behaviours.

Innovation

Product creativity continues to play a vital role in keeping the sweet bakery category relevant and exciting, with 30% on the lookout for flavour innovations. This rises to 36% among those who eat a sweet baked good OOH more frequently.

It's important to note, though, that during inflationary times consumers are more willing to choose familiar and trusted brands, as well as flavours they find comforting. Therefore, it's key to keep a good selection of known and trusted favourites. At the same time, there's growing appetite for innovation that aligns with evolving health and lifestyle priorities, with just over a quarter of consumers saying they would like to see healthier options.

Treating with added benefits, whether through reduced sugar, fewer calories or increased protein, reflects a more nuanced approach to treating, where enjoyment and wellbeing can coexist. Consumers, particularly those that track what they eat, want to continue to reward themselves, so it's important to offer a range of options, including lower calories.

New flavour combinations and formats can capture attention and drive footfall, while innovations that speak to health-conscious values can help broaden appeal and build loyalty across a wider consumer base. This should be underpinned by a solid offer from familiar brands.



"The wellness sphere continues to evolve, and there are many options for operators to consider when they are looking to maximise sweet bakery sales. Consumers continue to want to treat themselves as a moment of joy - a trend that underpins the growth of the category. Ensure displays are visually appealing and use words such as 'treat' in descriptors."

"Another part of wellbeing is looking for bakery options that can answer an additional desire, such as lower calorie options. Get to know your local audience to find out what their priorities are when it comes to wellness. You could also consider what other types of businesses are nearby and explore whether collaborations are an option."

"Flavour trends are another key area in terms of understanding the treat mindset. Have a look at what's trending in other categories and see how flavours such as matcha, ruby chocolate, exotic fruits, or even Dubai chocolate, could help your range appeal to more consumers."

Irene Ferre, Insights Lead
Nestlé Professional

National treasures: The nation's favourite bakes

Consumer preferences in the sweet bakery category vary slightly across age groups. Younger consumers, particularly those aged 16-24, are more likely to choose doughnuts, with 30% naming them as their go-to sweet treat. In contrast, those aged 55+ show a preference for other options such as croissants and muffins. This generational difference highlights how sweet bakery items can cater to diverse tastes and occasions.



Cookie culture

Cookies are leading the sweet bakery category in terms of both value and growth. Representing the most valuable subcategory in the market, cookies account for £328 million in spend and have seen impressive year-on-year growth of +15.2% in value and +9.4% in volume. Their success is driven by broad consumer appeal, as well as their ability to cater to a wide range of tastes and occasions.

Cookies also attract the most shoppers and drive the highest levels of engagement, making them a central player in the category's overall performance. While doughnuts remain a popular choice, selected by 26% of consumers as their preferred OOH treat, cookies are seen as a more permissible treat, and they consistently outperform doughnuts in terms of actual sales and frequency of purchase.

Muffins are also seeing strong performance, with a +12.9% growth in value. Their variety and versatility make them appealing to a broad demographic. Croissants too are benefiting from increased interest, with a +14.7% rise in value, reflecting their appeal as an all-day snack.

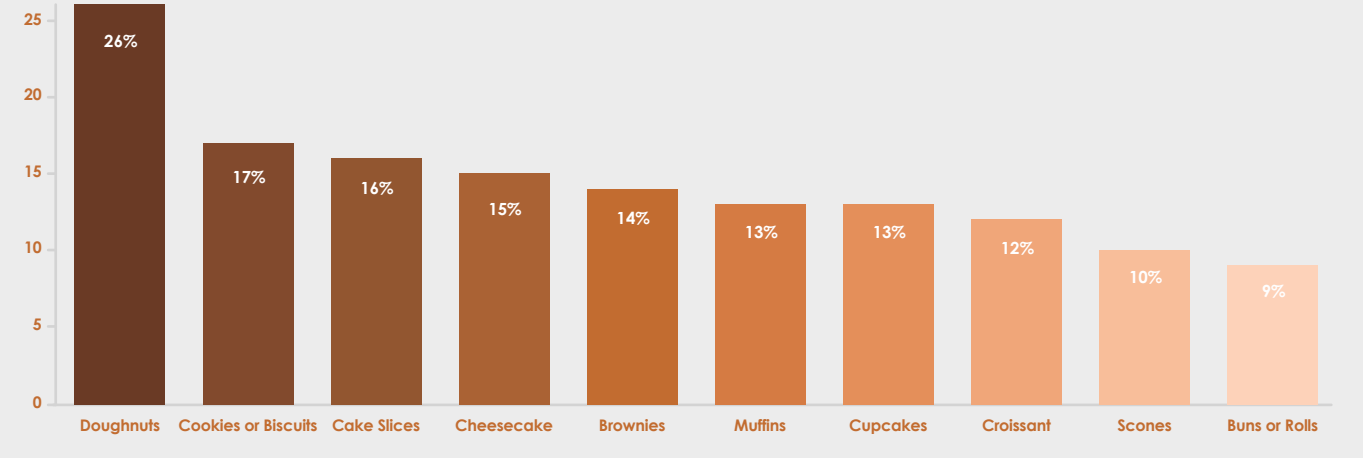
Understanding these shifting preferences and leveraging the growing demand for cookies, doughnuts, and other popular bakery items will be crucial for operators and brands looking to maximise their share in the evolving sweet bakery market.

Key purchase motivators

Sweet bakery is most often picked up in supermarket packaged and in-store bakery sections, especially cookies, owing to the mix of convenience and value.

By ensuring displays make bakery items both easy to pick up and visually appealing through offering attractive pre-packaged single or mixed options, operators will be able to tap into these key trends.

Top of the treats: OOH go-to sweet bakery



Nestlé Professional Sweet Bakery research, 1,000 consumers, March 2025 / Kantar OOH Purchase panel | 52w/e 29th December 2024

Time and place: When and where people enjoy sweet bakery

Time of day and location influence what people buy - and where they buy it. Whether a breakfast croissant or an evening treat, sweet bakery goods are enjoyed across multiple touchpoints.

Top items for each time of day:

Lunch	Afternoon	After Dinner
11% Doughnuts	10% Cookie or Biscuits	14% Cheesecake

TOP TIP

"Operators should consider looking at quieter day parts where they could create more opportunities, and cross reference them with sweet bakery items that are popular during those times. For outlets near offices, consider offering breakfast treats or afternoon bites for people to enjoy at work. For operators near a transport hub, sharing boxes of take-home treats could prove a winning formula for consumers. And don't forget the weekend opportunity, where sweet treats make popular breakfast items – especially croissants."

Irene Ferre, Insights Lead
Nestlé Professional

Morning to midnight: Sweet occasions

Afternoon snacking has overtaken lunch as the top sweet bakery moment. Looking back to 2023, lunchtime was the prime time for sweet treats. Fast forward to 2025, and the crown has passed to the 2-5pm slot. Today, a third of consumers say they turn to sweet baked goods as their go-to treat between lunch and dinner. This shift reflects wider consumption trends that suggest consumers look forward to an afternoon's moment of enjoyment.

The afternoon trend highlights a growing opportunity for brands and operators to position sweet bakery products as an afternoon treat, whether desk-side, a café break, or an on-the-go reward.

In sales terms, 21% of OOH sweet bakery purchases take place between 2–5pm - and another 24% in the evening (8pm–midnight).

Just over a quarter (26%) of consumers say they choose sweet bakery as a lunchtime treat, while slightly fewer opt for a mid-morning snack. At either end of the day, 15% enjoy sweet bakery as an after-dinner dessert, and 10% choose it for breakfast.

Singled out for their all-day appeal, cookies are a key driver of category growth, sitting in the top quadrant for penetration and frequency, a sign they are attracting both new shoppers and repeat customers. Both cookies and biscuits are consumed consistently throughout the day, making them valuable all-day options.



Don't forget breakfast

Though the occasion may not grab as many headlines, breakfast remains a stalwart for sweet treats, especially croissants. In 2024, more consumers ate out of home, with the breakfast occasion up a healthy 13.7%, thanks to more people returning to the office. From on-the-go commuters to desktop breakfasters, there are opportunities to grow the occasion.

"In the UK, around 50% of workers go to the office less than three times a week[1]. Employees who attend a workplace are often the ones who look for treats OOH. Hybrid working is here to stay, creating opportunities in sweet bakery for breakfast on the go, or desk-side."

Irene Ferre, Insights Lead
Nestlé Professional

Go-to for OOH purchases

Worth an estimated £516 million, retail remains the most valuable channel for sweet bakery out of home, led by supermarket in-store bakeries, which attract 35% of consumer purchases. Packaged supermarket bakeries and bakery chains follow closely at 22% each. These figures highlight the strength of trusted, everyday touchpoints in driving purchase, especially where convenience and perceived freshness align.

A look at the demographics shows 42% of 45 - 54-year-olds buy from supermarket in-store bakeries - the highest of any age group. However, the under 35s are a key demographic to watch. While they spend less overall OOH, they have increased their spend on desserts.

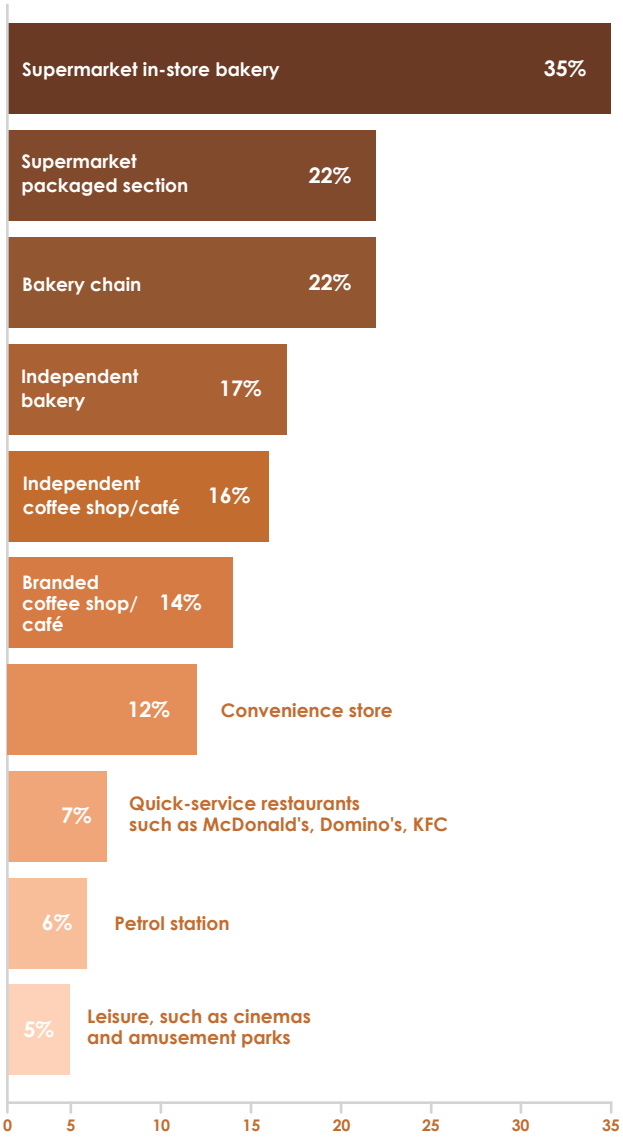
Independent bakeries, coffee shops, convenience stores and quick service restaurants round out the top channels.



"It's worth noting that supermarket in-store bakery items tend to be smaller than the rest of the sector, and often provide pre-portioned sweet bakery. These smaller portion sizes and nudge to sharing help to make the treats a permissible option."

Beth Hooper, Senior Nutritionist
Nestlé Professional

Top channels for sweet bakery purchases:



"OOH operators shouldn't overlook the significance of supermarkets and bakery chains - their popularity among those searching for sweet bakery indicates that ease and convenience are factors when consumers are deciding where to shop for a treat."

"It is worth noting that shopper repertoires are widening and consumers are buying a broader range of sweet bakery subcategories like cookies, croissants, muffins and scones, which spreads purchase frequency across more options."

"While supermarkets continue to dominate, coffee shops, independent bakeries, convenience stores and quick service restaurants such as McDonald's or KFC are proving valuable for sweet treats."

Irene Ferre, Insights Lead
Nestlé Professional

[1]Circana/ Foodservice Uncertainty Impact Survey, BIG 5, Sep 2024
Nestlé Professional Sweet Bakery research, 1,000 consumers, March 2025 / Kantar OOH Purchase panel | 52w/e 29th December 2024

Solo treat or shared delight: Why consumers buy sweet bakery

Sweet bakery products hold a special place in consumers' lives. By understanding whether sweet treats serve primarily as a moment of personal reward or a social purchase, operators can better tailor their offerings to meet both individual and group needs.

As we have already explored, the wellbeing mentality is important to acknowledge, with 28% of consumers who have eaten a sweet bakery item OOH in the last 30 days saying their main reason for buying a sweet baked good is for a moment of joy, closely followed by those looking to satisfy their appetite for a treat. Sweet bakery is the ideal match for those looking for a tasty interlude.

Looking good



Innovations include cube croissants with coloured glazes, Japanese rice doughnuts (mochi) and the ever-popular hybrids of cronuts and cruffins. Operators should use these sweet treats to enhance the look and appeal of their displays.

Family and friends: Consumption habits

Sweet bakery continues to play a role not just in individual treating moments, but in how people connect with others. Almost a third (31%) of UK consumers say they most often enjoy sweet bakery with family, while a quarter typically share a treat with their partner. These shared moments highlight the emotional and social value sweet bakery brings, making it more than just a snack; it becomes part of quality time, connection, and enjoyment.

That said, not everyone views sweet bakery as something to be shared. Over a quarter (26%) of consumers prefer to keep their treat to themselves, reinforcing the idea that sweet bakery is just as much about personal treating and moments of joy as it is about togetherness.

This balance between individual and shared consumption is also reflected in where people are enjoying sweet bakery.

In 2023, two in three sweet bakery items bought from retail were consumed outside the home, often in workplaces or casual foodservice settings[1].

However, recent data shows a marked shift: by 2025, over half (51%) of sweet bakery items are now eaten at home, even when purchased out of home.

This change underscores the growing importance of formats that travel well and retain their quality for later enjoyment.

A smaller but still notable share of consumers continue to eat sweet bakery on-the-go (11%) or immediately at the point of purchase (16%), reinforcing the need for convenience, portability, and impulse appeal.

"The spread of how people enjoy sweet bakery highlights the importance of both individual and sharing formats that suit both at-home and immediate enjoyment. Operators should consider how they package these items, perhaps having a range of options on hand that give consumers the opportunity to buy a selection of treats to take home, or just one for themselves."

"Pre-portioned bakery could also help answer the at-home trend, with pre-sliced cakes, muffin selections and doughnut boxes ready made for sharing."

"There is also an opportunity for workplaces to offer more variety to capture spend that is going somewhere else. Operators could replicate the High Street experience to appeal to those looking for treats or to satisfy an appetite for something sweet."

Josh Lewis, Desserts Category Lead
Nestlé Professional

[1] Nestlé Professional Sweet Bakery Report 2023
Nestlé Professional Sweet Bakery research, 1,000 consumers, March 2025 / Kantar OOH Purchase panel | 52w/e 29th December 2024



Sweet sustainability: Understanding ethics & green credentials

Consumers continue to be conscious of their impact on the planet and sustainability increasingly means different things to different people, depending on their priorities and concerns. Our research highlights three main areas when it comes to sustainability and sweet bakery.

One third of consumers say sustainable packaging is the most important consideration to them, while the same number are on the lookout for locally sourced ingredients. Slightly fewer (28%) look for ethically sourced ingredients, such as ethically sourced cocoa, flour and dairy.

Around a quarter (24%) of consumers say that if a bakery or sweet baked good is marketed as 'sustainable', fair wages and ethical working conditions for employees are most important. Digging a little deeper, there is a clear generational split, with 32% of consumers aged 25-34 marking fair wages and ethical conditions as key, compared to 20% of both 45–54-year-olds and those over 55 who feel the same.

Sustainability also comes up in connection with innovation and 17% of consumers say they would like to see more sustainable options in sweet bakery, including ethically sourced ingredients and eco-friendly packaging.

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."

"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

Brand recognition matters to those who enjoy sweet treats OOH. 60% of consumers say when choosing a bakery or sweet baked good, seeing a brand they know and trust is important to them.

A closer look at demographics shows that brand familiarity is much more important to younger consumers. Over three quarters (77%) of those aged 25-34 are on the lookout for a trusted brand, compared to 46% of those aged 55+.

Brands matter more to those who frequently enjoy sweet bakery treats outside the home. 79% of consumers who eat a sweet treat 2-6 days a week say seeing a familiar and trusted brand is important. Meanwhile. 40% of respondents who do so less often than once a month feel the same.

The top ten branded treat choices:

- Doughnut 22%
- Cookie 20%
- Cheesecake 17%
- Cake slice 14%
- Muffin 13%
- Cupcake 13%
- Brownie 12%
- Croissant 11%
- Teacake 10%
- Swiss roll 9%

In line with their penchant for branded treats, 30% of consumers aged 25-34 said they are more likely to choose a branded option for a doughnut, compared to 17% of those aged 55+.

And 28% of daily treaters are more likely to choose a branded option for a cookie or biscuit.

40% of UK consumers found Nestlé branded sweet bakery products most appealing when purchasing out of home – with Nestlé brands appearing in the top 3 most popular.



TOP TIP

"Consider stocking branded sweet treats in popular categories or look for innovations linked to popular brands."

"Keep an eye on social media to see what's trending. Doughnuts are a great example of sweet bakery that have gained traction online and increased their appeal to younger consumers."

Irene Ferre, Insights Lead
Nestlé Professional



Key Takeaways

Maximise afternoon opportunities: Promote sweet bakery items as an afternoon treat - this is now the top occasion for consumption.

Offer eye-catching packaging: 38% of consumers are swayed by visual appeal. Use clear packs, window boxes, or treat-style wrappers to drive impulse purchases.

Highlight value: Price remains a key driver, especially for doughnuts. Multipacks or promotions could help maintain volume while appealing to budget-conscious shoppers.

Stock a variety of formats: Include both single-serve and sharing packs to meet the needs of solo treaters and families.

Tap into self-care: Use point-of-sale signage with words like "treat" to resonate with consumers.

Pair with hot drinks: Sweet bakery aligns well with coffee occasions. Try bundle offers such as coffee and a cookie to drive extra spend.

Embrace innovation: 30% of consumers are looking for new flavours. Consider limited editions or trend-led flavours such as matcha, ruby chocolate or plant-based bakes.

Appeal to family and social sharing: Provide mixed boxes or "treat-for-two" deals to cater to group enjoyment.

Offer sustainable options: Highlight ethical sourcing and eco-friendly packaging. One-third of consumers actively seek these credentials.

Understand your local audience: Tailor flavours and formats to local businesses or key local demographics.

Keep trusted brands in the mix: Stock recognisable names for consumers who seek familiarity.

Make it travel-friendly: With more treats being consumed at home, especially from OOH purchases, sturdy and convenient packaging is essential.

Keep it sweet:
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