

Thin Is In: Tortillas and More

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Weighty Concerns

- 70% of American are concerned about their weight.
- 77% are trying to lose or maintain their weight.
- 69% changing the amount of food they eat.
- 63% changing the type of food they eat.

-- IFIC's 2010 Food and Health Survey



Types of Flatbread

- Tortillas (corn and flour)
- Naan
- Pizza shells
- Pita
- Chapatti
- Lavash
- Sandwich rounds



New Product Launches in the US

New “flatbread” products

Sub-category	2007	2008	2009	2010 (through Sept. 9)
Baking Ingredients & Mixes	0	0	4	2
Bread & bread products	3	22	3	13
Hors d'oeuvres	1	0	0	0
Meal kits	0	5	3	0
Pizzas	4	14	5	10
Sandwiches/wraps	0	8	18	1
Savory biscuits/crackers	7	4	10	3
Totals	15	53	43	30

New “tortilla” products

Sub-category	2007	2008	2009	2010 (through Sept. 9)
Bread & bread products	8	34	52	29
Corn-based snack	2	3	3	0
Wheat and other grain-based snacks	0	2	0	0
Totals	10	39	55	29

Source: Mintel Global New Products Database

It's a Flat, Flatbread World

- IRI named Arnold Select Sandwich Thins a Top New Product for 2009.
- \$87 million in first year sales.
- Low carb, low cal, higher in fiber, perceived as better for you.
- Targets dieting female consumers, aging Baby Boomers.
- Versatility across multiple eating occasions.



More Sandwich Rounds

- Copycats prove thin bun's staying power.
- Pepperidge Farm Deli Flats a big hit.
- EarthGrains, Nature's Own, Franz Thinwiches, others joined the crowd.
- Part of a broader flatbread trend driven in foodservice.
- Naan, wraps, tortillas, pitas, pizza bread can be made on similar equipment.



Thin Wins

“The launch of Pepperidge Farm Deli Flats was the biggest introduction we have had in 10 years....

“Each and every month, we have been growing significant share as our penetration grows while consumer repeat has been exceptional.”

--Tim Hassett
Pepperidge Farm

Emerging Flatbread Trends

- Grill marks
- Flexibility for wrapping
- Thin crispy crusts
- Portability/on-the-go options
- Ethnic varieties/global flavors
- Health claims, i.e. lower calories, lower sodium, increased fiber



Source: Grecian Delight Foods

Healthy Options

- Whole wheat
- Whole grain
- Low or reduced sodium
- Low or reduced carb
- Low fat
- Zero trans fats



Make it Count

- Formulation challenges
- Flexibility



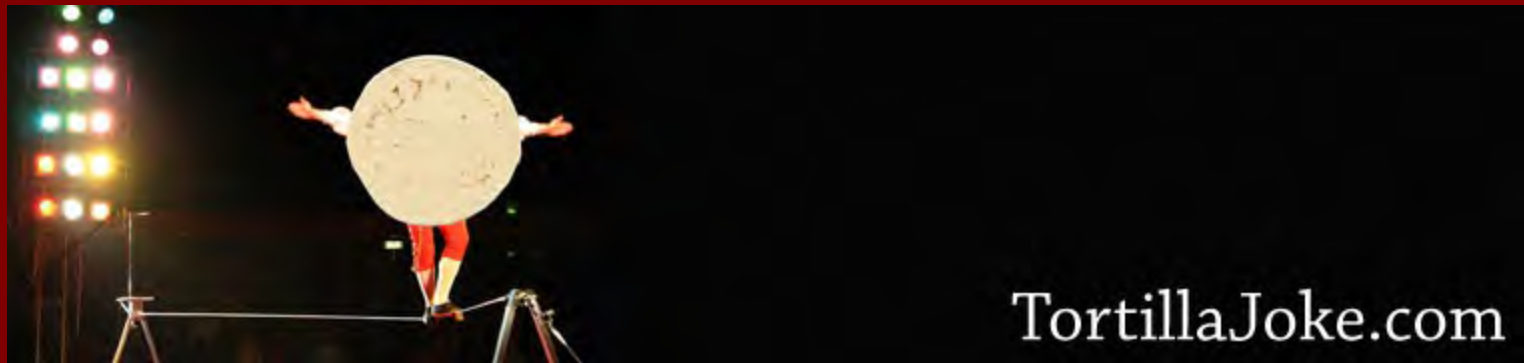
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Equipment Systems

- Dividers/rounders
- Dough sheeters
- Presses
- Ovens
- Cooling lines
- Packaging lines



Thank You!



If you would like additional information, please contact me at
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