

Lakes



THE FLAVORS *market*

Top 5 cake flavors introduced in Europe

between January 2024 and December 2025



CHOCOLATE

1.



CACAO

2.



VANILLA

3.



BUTTER

4.



HAZELNUT

5.



UP-AND-COMING FLAVORS IN 2025



Lemon



Raspberry



Pistachio

What's new for the *cakes* ?

Today, the yellow cake dough market is defined by **efforts to balance tradition with innovation**. Consumers continue to favor traditional recipes and familiar brands, which they associate with trust and reassurance.

However, the industry is confronted with **significant challenges related to raw materials**. Butter, flour, eggs, and cocoa prices have increased significantly, driven by unfavorable weather conditions and geopolitical tensions. These **price rises**, at times coupled with genuine **shortages**, are driving manufacturers to **explore alternatives** or **adapt their recipes**, while preserving the **quality** and **transparency** consumers expect.

Even with these challenges, yellow cake dough products remain a staple in eating habits, enjoyed at **breakfast** and **snack time**. In Europe, nearly four in ten consumers report consuming sweet pastries at least once per week.

The market also retains a **strong French identity**. Most players in the yellow cake dough sector are located in France, underscoring its cultural and economic significance. French consumers remain strongly attached to these products. **Families with children or teenagers** are the primary consumers. Yellow cake dough products must entice kids with **taste, indulgence**, and **fun sizes**, while reassuring parents, the ultimate decision-makers.



Did you *spot them?*

Where tradition meets innovation

Today's consumers seek products that blend **authenticity** with **originality**. Traditional pastries provide reassurance through cultural heritage and **comfort**, yet they become more attractive when reinvented with **new flavors** or **indulgent pairings**.

Armenian culture, brought to life through culinary pleasure



COMPANY	Marlenka
BRAND	Marlenka
LAUNCH	Latvia, August 2025

Inspired by an **Armenian family recipe**, this roll showcases traditional know-how while offering a gourmet and original pairing of **honey** and **blueberry**.

The perfect duo



COMPANY	Marlenka
BRAND	Marlenka
LAUNCH	Latvia, August 2025

The **brookie** is the perfect example of reimagined pastry : it combines two great classics, the **cookie** and the brownie, to create a unique product that surprises with its simplicity and generosity.

Portable, shareable, snackable : the rise of snacking

Increasingly, eating occasions are evolving toward **quick, on-the-go meals**, particularly at **lunch** and **snack time**. Yellow cake dough products are evolving with **mini sizes** and **snackable versions**, convenient to carry, share, and eat on the go.

This trend responds to a **dual demand**: **convenience** and **indulgence**, while enabling lighter, moderate consumption.

Brownie indulgence, in a snackable size.



COMPANY	Co-op
BRAND	Co-op
LAUNCH	United Kingdom, April 2025

These **brownie bites** celebrate a classic **indulgence**, now offered in a **more convenient portion**.

Fresh cocoa snack, ready to go



COMPANY	TSC Food Products
BRAND	Banania
LAUNCH	France, July 2025

Offered in an **individual serving** and stored in the refrigerator, Banania extends its iconic cocoa range into a **product tailored to everyday routines**, combining **comforting pleasure** with **convenience**.



Cut back, without giving up enjoyment

Reducing sugar has become a key priority for consumers, attentive to their health and wellness. Consumers aim to reduce their sugar intake, conscious of its impact on weight, focus, and the onset of certain health conditions.

In response, manufacturers are introducing **lower-sugar recipes**, while maintaining the indulgent appeal that underpins the success of yellow cake dough products. The challenge lies in finding the right balance: **lowering sugar without compromising taste or texture**, as sugar is still essential to the recipe, contributing to both flavor and moistness.

Indulgence with reduced sugar



COMPANY	Le Ster
BRAND	Le Ster
LAUNCH	France, May 2025

Le Ster's madeleine retains all the indulgence of a **traditional recipe**, enriched with **chocolate chips**, while **reducing its sugar content by 30%**.

An authentic madeleine, meeting today's expectations.



COMPANY	St Michel Biscuits
BRAND	St Michel
LAUNCH	France, March 2025

A **snack-sized portion, lower in sugar**, while keeping the **authentic flavor** of the St Michel madeleine.

Frozen convenience, homemade appeal

Frozen yellow cake dough products are becoming increasingly popular, offering consumers the convenience of enjoying at home the taste of something fresh from the oven. Muffins, croissants, doughnuts and fritters: recipes that would take time and expertise to prepare by hand, but which are now accessible in just a few minutes.

This approach brings a more authentic, artisanal aspect, moving away from the image of ready-to-eat industrial pastries. In this way, it meets a twofold consumer expectation: the practicality of a quick-to-prepare product and the comforting pleasure of a bakery delicacy.

Nutella pleasure, ready in minutes



COMPANY	Ferrero
BRAND	Nutella
LAUNCH	France, June 2025

Following the September 2024 launch of its **muffin** and **croissant** filled with its iconic spread, Nutella broadened its frozen line with two new additions: **the crêpe and the donut**.

These products, which would require time and skill to prepare at home, become **ready in just minutes** in the microwave. They provide a **moist** and **indulgent** result, reminiscent of homemade, with the practicality of frozen.





Like the bakery, ready at home in no time



COMPANY Fria Bröd

BRAND Fria

LAUNCH Austria, August 2025

Frozen bakery specialist Fria is responding to **new dietary trends** with its **gluten-free, vegan cinnamon roll**, ready in minutes at home.

Manufacturers follow the roll trend



COMPANY Mix' Buffet

BRAND Mix' Buffet

LAUNCH France, October 2025

Available in two recipes — **cocoa-hazelnut** and **pistachio** — this product offers **gourmet rolls** in a **convenient ready-to-eat** pack.

Don't miss out on these
other launches this year!

New pistachio launches

Pistachio is the **flavor of the year**, driven in particular by the buzz around **Dubai Chocolate** on social media.



The madeleine goes green with pistachio



COMPANY	Hummingbird House
BRAND	Hummingbird House
LAUNCH	France, July 2025

Maison Colibri introduces its **pistachio-flavored madeleines**, a chocolate-free recipe that responds to the growing demand for **intense, authentic** flavors. The brand focuses on a **short ingredient list**: free-range eggs and French flour, without colorants, artificial flavoring, or palm oil.

Decadent croissants filled with pistachio cream



COMPANY	Sammontana
BRAND	Tre Marie
LAUNCH	Italy, September 2025

Croissants **generously filled with pistachio cream** from tip to end to meet the demand for **premium, indulgent** breakfast options. These delights can be baked in the oven or prepared in the air fryer without defrosting, combining pleasure, convenience, and modernity.

The brownie reimagined



COMPANY Amicake

BRAND Amicake

LAUNCH Poland, July 2025

Dubai-style chocolate brownie: **filled with** pistachio cream and kataifi pastry, finished with a **pistachio glaze** and a **sprinkle of** pistachios.



Fresh innovations in kids' snack aisles in France

The snack aisle is still **dominated by chocolate**, but we are seeing more and more **innovations** in **textures** and **shapes**.



COMPANY Jacquet Brossard

BRAND Savannah

LAUNCH France, April 2025

Jacquet Brossard expands its Savane range with two new products: P'tit savane tornado, a **strawberry roll**, and Savane Max cœur choco, a **soft cake with a gooey chocolate center**. Convenient options for snacking on the go.



COMPANY Barilla
BRAND Harrys
LAUNCH France, January 2025

The Harrys brand is diversifying beyond sandwich breads and brioches –**it's launching a new snack range!**

Three products: Chocomousse, a sponge cake filled with **chocolate mousse**; Chocalin, a sponge cake filled with **chocolate cream** and coated with a **chocolate shell**; and Tendrissime, with a soft, airy texture and **a silky cream flavored with cocoa and hazelnut**.

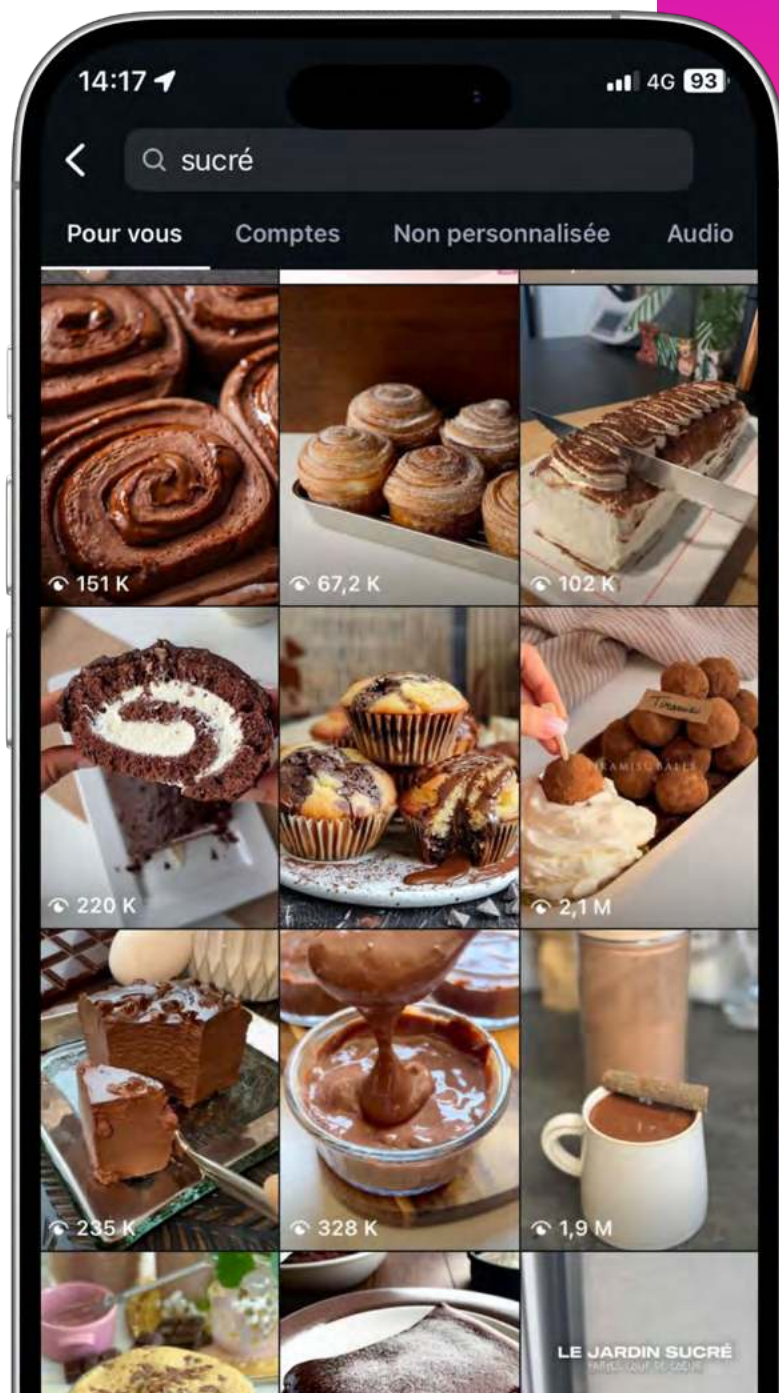


COMPANY St-Michel Biscuits
BRAND St-Michel
LAUNCH France, January 2025

St Michel is innovating in its snack range, launching its first **chocolate crepes** and a **soft cake shaped like a domino** – a playful, practical design.



INSTAGRAM & bakery



Why look at
Instagram?



Why look at *Instagram?*

Instagram has established itself as a **key platform** for **bakery trends**, where **new creations**, **recipes** and **visual codes** spread rapidly.

The most engaging content showcases spectacular, generous, and innovative products that gradually **shape consumer expectations** and **inspire product designs**, both artisanal and industrial.

Bakery trends spotted on *Instagram*

Rolls, the new stars of Instagram feeds

Firmly established on Instagram, **cinnamon rolls** captivate through their **comforting appeal** and their **strong visual impact**. Their iconic spiral, paired with generous glazes and multiple flavor variations, makes them the perfect canvas for **indulgent** and **distinctive** creations.



3 recipes to *inspire you*



Click on a recipe to
view it

THE CLASSIC



CINNAMON ROLL BANANA BREAD STYLE



CINNAMON ROLL TIRAMISU STYLE



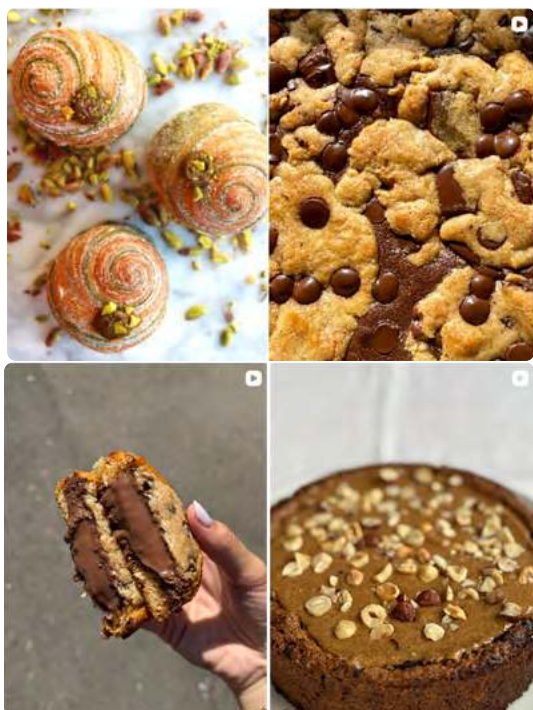


Eye-catching indulgence that fuels engagement

The most **successful** products on Instagram are those that highlight **textures** and **contrasts**: glossy coatings, gooey centers, and visible toppings.

The look itself ignites desire — designed to be sliced, filmed and shared.





Hybrid pastries — creativity with a twist

Already **well established**, the trend of hybrid pastries **continues its appeal** on Instagram.

The mix of several **iconic pastries** (croissant-cookie, roll-donut, reinvented brioche etc.) results in original products with **unique sensory appeal**. These hybrid formats **stand out** for their originality yet feel **familiar** thanks to their classic roots.

3 recipes to *inspire you*



Click on a recipe to
view it

CROISSANT ROLL & COOKIE



MINI PUMPKIN SPICE CRUFFINS



BROOKIE





OUR
portfolio

Our flavors
to capture the **trends**



HAZELNUT
Natural Flavour
AMH0222



BUTTER
Natural Flavour
AMB9597



MANDARIN
Natural Flavour
AAM4620



BUTTER
Natural Flavour
AOB4019



Request a sample

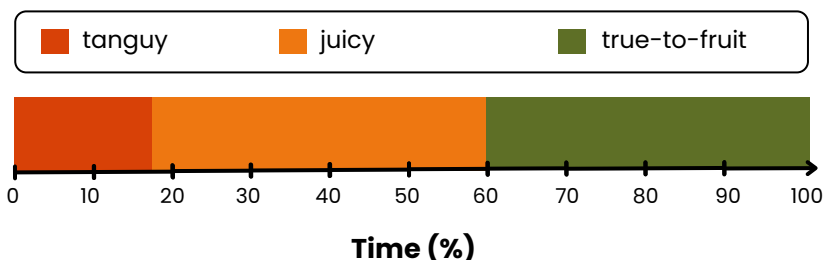
AAM4620 MANDARIN Natural flavour



PROFILE

The mandarin, with its burst of **sweet** and **juicy** flavour, is a **citrus** fruit appreciated as a **delicious** and **refreshing** snack

TEMPORAL DOMINANCE OF SENSATIONS



DOSAGE IN YOUR PRODUCT

- 0.1 % Beverages
- 0.2 % Protein & smoothie
- 0.3 % Desserts (dairy & vegan)
- 0.4 % Ice cream, toppings, cordial
- 0.5 % Bakery, bar, cereals & treats

PRICE BREAKS

PO	\$/kg
8 kg	\$68.00
16 kg	\$58.00
32 kg	\$48.00
96 kg	\$40.80
200 kg	\$38.40
400 kg	\$36.00
1000 kg	\$33.60

From **low MOQ** to best value on **volumes**

Free shipping to Australian metro areas for orders over **\$1,250**

Manufactured in Sydney
5-day lead time (+transit)



NATURAL FLAVOUR

FREE FROM: ADDITIVE, ALLERGEN,
DIACETYL, GLUTEN, GMO & SUGAR



KOSHER CERTIFIED
VEGAN & AUSTRALIAN-MADE
ORGANIC COMPLIANCE



CARRIER: ETHANOL
WATER SOLUBLE



LIQUID IN 8KG DRUM
BB: 12 MONTHS

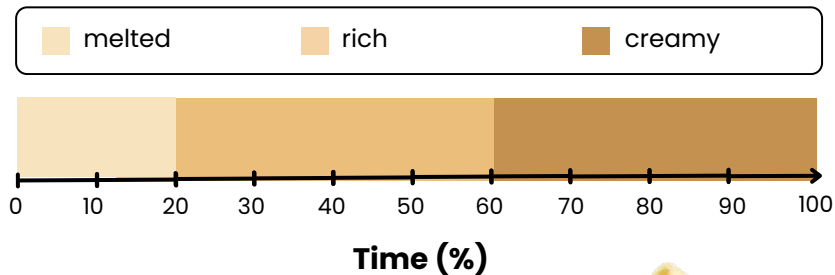


AMB9597 BUTTER NATURAL FLAVOUR

PROFILE

This butter flavour delivers the **creaminess** of **slightly melted butter**. The moment you **spread** butter on a freshly toasted slice of bread. It adds richness to all your projects.

TEMPORAL DOMINANCE OF SENSATIONS



DOSAGE IN YOUR PRODUCT

- 0.1%  Protein milk, smoothie
- 0.2%  Yogurt (dairy & vegan)
- 0.3%  Ice cream & toppings
- 0.4%  Bakery, cake, bars, cereals
- 0.5%  Confectionery

PRICE BREAKS

PO	\$/kg
10 kg	\$58.00
20 kg	\$48.00
40 kg	\$38.00
100 kg	\$32.30
200 kg	\$30.40
400 kg	\$28.50
1000 kg	\$26.60



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NATURAL FLAVOUR

FREE FROM: ADDITIVE, ALLERGEN,
GLUTEN, GMO & SUGAR



KOSHER & HALAL CERTIFIED
VEGAN & AUSTRALIAN-MADE



CARRIER: MPG
WATER SOLUBLE & HEAT STABLE



LIQUID IN 10KG DRUM
NON FLAMMABLE
BB: 9 MONTHS

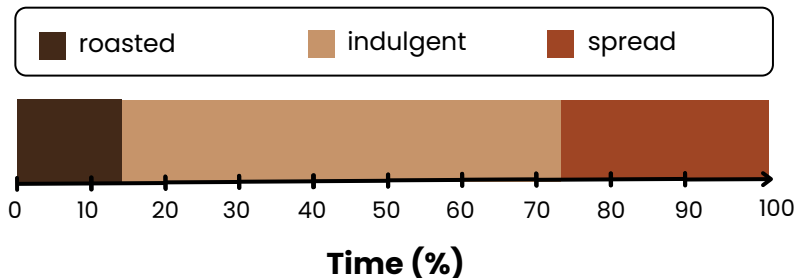


AMH0222 HAZELNUT NATURAL FLAVOUR

PROFILE

A delightful **blend** of **creamy richness** and **earthy** undertones with **chocolate** ground notes, reminiscent of cherished **childhood memories**

TEMPORAL DOMINANCE OF SENSATIONS



DOSAGE IN YOUR PRODUCT

- 0.1% Protein milk, smoothie
- 0.2% Yogurt (dairy & vegan)
- 0.3% Ice cream & toppings
- 0.4% Bakery, cake, bars, cereals
- 0.5% Confectionery

PRICE BREAKS

PO	\$/kg
10 kg	\$64.00
20 kg	\$54.00
40 kg	\$44.00
100 kg	\$37.40
200 kg	\$35.20
400 kg	\$33.00
1000 kg	\$30.80



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Manufactured in Sydney
5-day lead time (+transit)



NATURAL FLAVOUR

FREE FROM: ADDITIVE, ALLERGEN,
GLUTEN, GMO & SUGAR



KOSHER & HALAL CERTIFIED
VEGAN & AUSTRALIAN-MADE



CARRIER: MPG
WATER SOLUBLE & HEAT STABLE



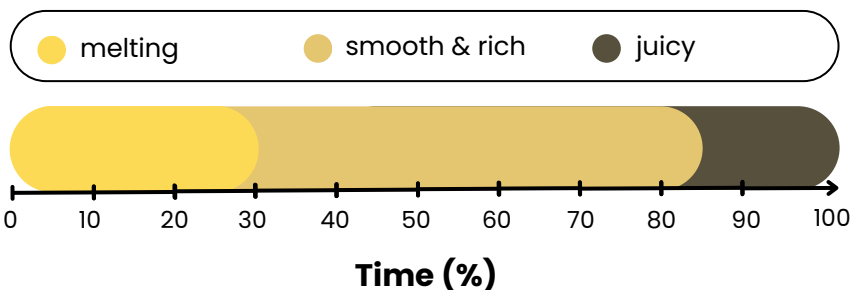
LIQUID IN 10KG DRUM
NON FLAMMABLE
BB: 18 MONTHS

AOB4019 BUTTER OS NATURAL FLAVOUR

ABOUT

Get ready to cook with this **melting** butter natural flavour. Bring all the yummy to your dishes with this **smooth & rich** delicacy. Suitable for savoury sauce & sweet development.

TEMPORAL DOMINANCE OF SENSATIONS



DOSAGE IN YOUR PRODUCT

- 0.2%  Protein rich bars
- 0.3%  Fat filling & pastry
- 0.4%  Popcorn
- 0.5%  Chocolate, gum

NATURAL FLAVOUR

FREE FROM: ADDITIVE, ALLERGEN,
GLUTEN, GMO & SUGAR

KOSHER & HALAL
VEGAN & AUSTRALIAN-MADE

CARRIER: MCT
OIL SOLUBLE & HEAT STABLE

LIQUID IN 10KG DRUM
NON FLAMMABLE
BB: 12 MONTHS

PRICE BREAKS

PO	\$/kg
10 kg	\$68.00
20 kg	\$58.00
40 kg	\$48.00
100 kg	\$40.80
200 kg	\$38.40
400 kg	\$36.00
1000 kg	\$33.60



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5-day lead time (+transit)



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