Marketing of free-from products in Swedish bakeries and patisseries

Marknadsföring av allergivänliga produkter i svenska bagerier och konditorier

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While Katharina mainly focused on the literature review, Johanna investigated the method for this Master's Thesis. The remaining parts of this work have been written collaboratively.

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Abstract

Food trends are evolving in many ways and one of the biggest upcoming trends is the free-from diet, which represents products free from allergen ingredients such as gluten, lactose, etc. The trend has reached individuals with food intolerances as well as people with a health conscious mind who believe this being a healthier way of living. In general, the amount of individuals who are starting to be aware of the free-from term and concept is constantly increasing. The purpose of this master thesis is to evaluate the current adaptation of allergen free products among Swedish bakeries and patisseries from a marketing perspective. The identified problem in the field is the lack of information concerning how bakeries and patisseries are marketing the allergen free products. The literature review presents different food trends and definitions based on current literature as a conceptual basis for the analysis. In order to answer the research question, a quantitative method in form of a survey was used. There were 38 companies who participated in the survey and the results show that the majority does not market the allergen free products in a different way compared to regular products and that competition within this market is experienced to be rather low. In the analysis, the results are divided into companies with and without allergen free products. This Master’s Thesis concludes that bakeries and patisseries in Sweden have successfully introduced allergen free products to the market, but they need to set a deeper focus on the free-from marketing of such products in order to survive future competition. Moreover, marketing implications are formulated for the Swedish bakery Swebake AB, which is the cooperation company for this thesis. In the last part of this thesis, fields of further research are named.

Keywords

Allergen free, bakery industry, free-from, functional foods, food intolerance, marketing
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List of Abbreviations

AB       Aktiebolag
ACE      Vitamins A, C and E
CEO      Chief Executive Officer
FA       Food allergy
FDA      American Food and Drug Administration
kr       Swedish crown
LAB      Lactic acid bacteria
LCHF     low carbohydrate/high-fat
n        number of respondents
NWIC     National Wheat Improvement Committee
ppm      parts per million
Q        Question
SCF      Svenska Celiakiförbundet
UK       United Kingdom
US       United States
1. Introduction

The introduction informs the reader about the researched topic, introduces the partner company, explains the problem definition and reveals the research question. Furthermore a brief summary of the research in the field as well as the purpose and delimitations are presented.

1.1. Background

The weight-losing industry is a billion dollar business: Whether respondents test a promising diet from a magazine or try to lose weight with the help of third parties such as WeightWatchers®, people are more concerned about their weight and look as ever before. Even though scientists such as Yackobovitch-Gavan and colleagues (2008) showed that losing weight positively affects the emotional and psychosocial behavior of the person, dieting often ends with binge eating (Polivy & Herman 1985).

In Sweden the “low carbohydrate/high-fat” (LCHF) diet is still the most successful monetized weight-loss diet with various LCHF magazines and recipes websites available (Gunnarsson & Elam 2012). However, recently the public concern shifted from diets to food intolerances as this condition became highly fashionable due to celebrity online posts and a generally higher awareness in the public (Badiu et al. 2014). Food intolerances, as for example gluten or lactose intolerances, are non-immunologic adverse reactions, which can result in abdominal pain or diarrhea, but have in general no life-threatening consequences (Boyce et al. 2010, p. 13).

In 2013 the Swedish newspaper “DN” reported that gluten allergies are the most common allergy in Sweden and that at least 150,000 citizens suffer from the disease, of which two thirds have not even received a diagnosis for yet (DN 2013). It is therefore not surprising that sales of gluten-free products have greatly increased in recent years. The free-from trend, where customers do no longer pay for what they get but for what is left out in a product, has its origins in the lactose-free movement as well as in the nationwide popular LCHF diets (SVD 2015).

In the following, the cooperating company Swebake AB will be introduced. Then, a research question will be presented based on the problem definition and the research in the field. Last, the authors will state the purpose of this Master’s Thesis and give an explanation for delimiting the work.

1.2. Swebake AB

The cooperation with the company Swebake AB is based on the authors’ wish to apply theory to a practical case. Lennart Dahlbom, one of the two co-founders of Almondy AB recently started a new business called Swebake AB. The cooperation with Swebake is beneficial as the authors get a marketing insight from the supplier’s point of view. By investigating bakeries and patisseries, also recommendations for the supplier side of the supply chain—in this case Swebake—can be made.
Swebake AB, established in 2014 and based in the Gothenburg area in Sweden, is a free-from bakery. They create filled cake bases, which are free from gluten, lactose, nuts and soy. Even though the company just recently found the right manufacturing site for their cake bases, production did not yet start. Swebake’s business idea is to provide a filled cake base to professional pastry chefs, as an ingredient/semi-finished product for the production of gluten-/lactose free cakes. (Swebake 2015).

**Product**
Swebake specializes in creating free-from filled cake bases in the following flavors: Vanilla-Strawberry, Chocolate-Raspberry, and Chocolate-Apricot. The cake base consists of three layers of gluten-free sponge cake with a high fruit-content jam and lactose-free custard filling (Swebake 2015). In the future the cake bases will be sold to wholesalers in a paper box containing four items each (Moore 2015).

**Competition**
Swebake produces unique and innovative free-from cake bases and therefore is currently not experiencing any competition. Nevertheless, there exist smaller niche bakeries in Sweden, which already manufacture gluten-free cake bases. However, as far as Swebake is aware of, there are no bakeries in Sweden, which sell allergen free compound cake bases (bases/jam/cream) with Swebake’s mass-productive concept (Moore 2015).

**Customers**
Swebake targets customers on the professional market, including wholesalers, who resell to bakeries and patisseries. Swebake is currently presenting their business concept to Sweden’s leading companies within the market: Kåkå AB, Kobia AB, and Bageriprodukter AB (Moore 2015).

**1.3. Problem Definition**

After conducting preliminary research about various types of food trends and food intolerances, it became evident that little to no information is available on how the trend of allergen-free products has been adapted by Swedish bakeries and patisseries. Nevertheless, some articles acknowledge the upcoming trend as well as the increasing number of companies which offer products that are allergy friendly. Still the questions remain on how these companies adjust their allergen free products to their entire assortment and, more importantly, how they market these products.

The “free-from” term has not established itself yet in the food industry and among customers, but is recognized overall as an upcoming trend in the market. People are becoming more aware of the existence of various allergen free products, hence explaining the constantly increasing demand, irrespective of whether people have actual intolerances or simply believe that those products are healthier than regular ones. Based on the trend of free-from products and the overall lack of information in the field, the problem definition is narrowed down to the lack of marketing understanding in the field of free-from products. This Master’s Thesis will explain the free-from trend and its characteristics and investigate Swedish bakeries and patisseries in order to understand how this business field markets free-from products.
The practical problem can be defined as a lack of research knowledge in marketing within this field. Therefore the aim of this thesis is to provide a needed analysis of bakeries and patisseries owner’s settings towards free-from products and a general marketing approach for this branch. Therefore, the research question is constructed as follows:

How do Swedish bakeries and patisseries market the trend of free-from products?

1.4. Research in the field

The literature review in Chapter 2 will give a resume about the current findings regarding functional and especially free-from foods. During the review two areas were detected. First, the usage of free-from foods in the fourth largest functional food production group “bakery” (Datamonitor 2001) and second there were no scientific publications found on the matter of free-from food marketing for the bakery industry. Several researchers such as Bigliardi and Galati (2013, p.126) mention that “consumer research is crucial in the development of functional food and requires further development and research”.

Functional foods are widely discussed among researchers and can be described as life-improving and life-simplifying products, which reduce existing health risks (Makinen-Aakula 2006). There are review papers, which define functional foods (Bigliardi & Galati 2013), discuss its health claims (van Kleef et al. 2005), as well as its developments, trends (Betoret et al. 2011), marketing (Menrad 2003), and innovations (Mark-Herbert 2004).

The term free-from foods which bundles gluten-free, lactose- free and other free-from products, is relatively young and until now not commonly used. Only few academic papers were headlining the term and the majority of relevant information concerning free-from products came from certified food magazines (Petrak 2014; 2014a; 2014b).

While there are articles about nut allergies (Celiaki 2014; Sicherer et al. 1999) and soy intolerances (The Swedish Society for Coeliac 2013; Seidu 2014), most information is provided on gluten-free products: its nutritional effects (Alvarez-Jubete et al. 2010), consumer surveys (Mintel 2013), and trends (Schultz 2013), which give a broad spectrum of information on the matter.

Other papers, such as Badiu, Aprodou, and Banu’s article from 2014 “Trends in the development of gluten-free bakery products” discuss the trends and opportunities in the manufacturing process of gluten-free products. Latacz-Lohmann and Foster (1997) investigate marketing strategies for organic foods in the UK and Germany, while Spiller and Zühdorf (2008) question organic bakeries in Germany about their product range and marketing.

The secondary data research showed that there exist no scientific articles which discuss free-from products from a marketing perspective yet, justifying our research aim with this thesis.
1.5. Purpose

The purpose of this paper is to analyze the Swedish free-from market in bakeries and patisseries with the help of a survey. By comparing the survey results with current research in the field, conclusions can be drawn on how this specific market is operating marketing-wise at the moment. Thereby suggestions for the future marketing of free-from products as well as for Swebake’s operations can be made.

1.6. Delimitation

Functional food covers a wide range of food and drinks which is why the authors chose the trendy free-from section for investigation. Throughout this thesis, the main focus is laid on the bakery and patisserie branch due to the facts mentioned in Chapter 1.4. As a Master’s Thesis in Marketing, it is plausible to investigate this business segment over others. Concerning the study, only a small number of companies in this business area are represented in the survey. These respondents function nevertheless as representatives of the branch.
2. Literature Review

The literature review will present different food trends in general, the definition of the terms functional food and free-from, its market, and the marketing of such products. Thereby a base of understanding the applied terminology will be created.

2.1. Food Trends

The food and beverage industry shows steady annual growth rates with a strong focus on health and wellness over the last years. According to the article “Key Trends in Functional foods & beverages for 2015” by Julian Mellentin (2014) a trend’s usefulness can be tested by checking whether the trend has created a new market category or not. It has to increase the profit margin in order to be a lasting trend worth to be analyzed. Since the health food category is growing every year, the transported message of “Naturally Functional” has become one of the biggest trends. Now, customers choose products which support their idea of a well-balanced diet enriched with natural ingredients, when purchasing their groceries (Mellentin 2014).

There are many ingredients that are seen to be good and healthy by a wide range of consumers. Some of them include protein, less and better carbs, or lower carbohydrate content. Free-from is a category that involves products which present “free from artificial additives and preservatives”. For example gluten-free products are characterized by the message “free from something bad”, which is very valuable for the health-conscious consumers. One of the key health trends 2015 are “good grains” such as chia-seeds and gluten-free products, which promise a better digestion and weight regulative effects, and are seen as a healthier alternative to wheat and rye. These products are associated with a good and healthy lifestyle, and therefore also consumed by persons without a gluten allergy or intolerance (Mellentin 2014).

An intolerance to certain food ingredients means that the body’s immune system shows a negative response to substances which are normally harmless to other people. Food intolerance is the definition even for the reactive situation, where it is hard to identify the actual type of ingredient that has caused the reaction (Blades 1997).

The number of people, who are suffering from these different conditions, is increasing steadily (Blades 1997). The catering industry meets a lot of people that are suffering from food allergies. The demand for special food products and ingredients is therefore growing. Moreover many of the sales employees in the hospitality industry do not have the right or only a very limited knowledge on food allergies. This is an area which requires expertise in order to respond appropriately to given requests (Pratten & Towers 2003).

The study “Attitudes towards low-allergen food in food allergic consumers” by Susan Miles et al. (2005) makes new and updated information available about consumers’ attitudes towards low-allergen food. The data was collected from consumers in the Netherlands, Austria and Spain. The results show that the majority of the participants would be interested in purchasing low-allergen food if it was considered safe, with
good quality and taste. Further the price turned out to be an important factor as well. This research indicates the importance for the food industry to get hold of this kind of information to be able to develop new products for individuals with food intolerances.

2.2. Definition of functional and free-from foods

In general, medical research distinguishes between food allergies (FA) and food intolerances. A food allergy is a medical condition with altered immunologic reactivity; an allergic reaction to a certain food protein (e.g. milk protein), which can – when accidentally eaten, cause “breathing difficulties, swelling of the lips, and throat, abdominal cramps and vomiting, and possibly death” (Hadley 2006, p. 1080). Food intolerances as for example lactose intolerance on the other hand are non-immunologic adverse reactions, which “elicit reproducible adverse reactions but do not have established or likely immunologic mechanisms” (Boyce et al. 2010, p. 13). Adverse reactions occur in forms of abdominal pain or diarrhea (Boyce et al. 2010). A third term, food hypersensitivity is often used to describe FAs but originally describes any reaction to food including FA and intolerances (Boyce et al. 2010).

2.2.1. Food allergy and intolerance commonness

Food allergies are an increasing public health problem with no current treatment (Boyce et al. 2010). Branum and Lukacs (2009) claim that 5 % of all American children under five years and 4 % of the teenagers and adults in the U.S. are affected by food allergies. Furthermore, from 1997 to 2007 food allergies among children under 18 years increased with 18 %. These figures are similar in other countries: Kristjansson et al. (1999) investigated adverse reactions to food and food allergies of young children in Iceland and Sweden and found that in both countries 2 % of the children had food allergies and 27 % (Sweden) and 28 % in Iceland showed adverse reactions to food.

2.2.2. Definition of functional food

The term “functional food” first occurred 1984 in Japan, in relation to a study regarding fortified food products with positive physiological effects (Hardy 2000). The objectives of functional foods are to (1) improve the general body condition, (2) to decrease the risk of certain diseases and (3) to cure some illnesses (Mark-Herbert 2004; Menrad 2003). Moreover, Makinen-Aakula (2006) classifies functional foods based on their aim: (1) life improving and improved well-being such as pre- and probiotics, (2) reduction of an existing health risk problem such as high blood pressure and cholesterol and (3) life simplifier such as lactose or gluten-free products. With Makinen-Aakula’s (2006) classification of functional foods as life simplifiers, free-from products can clearly be categorized as such. Bigliardi and Galati (2013) reviewed 39 definitions for functional foods and state that they all encapsulate the three concepts of nutritional function, health benefits and technological process.

All functional foods need to serve a nutritional function. According to Hasler, Brown and the American Dietetic Association (2009), infant foods are hypoallergenic foods
such as gluten and lactose-free as well as weight-losing food examples serve a nutritional function. Ashwell (2003) claims, that nutritional science is shifting from maximized content of ingredients to an optimal nutrition motivated by increasing lifestyle-related diseases and health care costs as well as longer life expectancies. This implies that with the help of nutritional functional foods every dietary deficiency can be covered: from omega-3 enriched eggs over increasing iodine and iron levels to calcium fortified drinks for lactose-intolerant customers.

The second concept of “health benefits” covers functional foods that “may reduce certain disease risks or promote optimal wellness” (Bigiardi & Galati 2013, p. 125). Van Kleef, van Trijp and Luning (2005) differentiate health benefits into direct health benefits (e.g. Lactic acid bacteria (LAB), oat, barley and rye), reduction of risk diseases (e.g. ACE drinks, eye health drinks and omega-3 enriched eggs) and better life conditions (e.g. prebiotics).

All in all free-from products can be defined as functional foods as they serve a nutritional function. Therefore, further explanations will be based on the definition of functional foods by Hasler (2000) as it covers all three main concepts: “Foods that, by virtue of physiologically active components, provide benefits beyond basic nutrition and may prevent disease or promote health” (Hasler 2000, p.500).

2.3. Food allergies and intolerances

There are more than 160 foods that can cause allergic reactions in people while the eight most common food allergens are responsible for 90 % of all food-allergic reactions. These are crustacean shellfish (e.g. crab, crayfish, lobster and shrimp), eggs, fish (e.g. bass, flounder and col), milk, tree nuts (such as hazelnuts, almonds, walnuts, pecans, cashews and pistachios) and peanuts, soybeans and wheat (Petrak 2014).

Table 1 shows the estimated prevalence of these top food allergens in the US (Boyce et al. 2010).

Table 1: Estimated prevalence of food allergies in the US (Boyce et al. 2010).

<table>
<thead>
<tr>
<th>Allergy against</th>
<th>Estimated prevalence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peanuts</td>
<td>0.6 % – 1.3 %</td>
</tr>
<tr>
<td>Tree nuts</td>
<td>0.4 % – 0.6 %</td>
</tr>
<tr>
<td>Fish</td>
<td>0.4 %</td>
</tr>
<tr>
<td>Crustacean shellfish</td>
<td>1.2 %</td>
</tr>
<tr>
<td>All seafood</td>
<td>0.6 % (children); 2.8 % (adults)</td>
</tr>
<tr>
<td>Milk and egg</td>
<td>1.2 % for young children; 0.2 – 0.4 % for adults</td>
</tr>
</tbody>
</table>

While milk, egg, wheat and soy allergies can disappear in childhood; nuts and fish allergies can remain as life-long allergies (FARE 2014). In the following the most
important food intolerances and allergies concerning this Master’s Thesis are presented in detail.

2.3.1. Gluten intolerance

Svenska Celiakiförbundet (SCF) claims, that in Sweden 1 to 2 % (approximately 100,000 citizens) suffer from gluten intolerance (medical term: celiaki) or the so-called coeliac disease. Gluten intolerance is a chronic intestinal disease where the small intestine is damaged by the gluten protein. The gluten protein is represented in wheat, rye and grain and causes malnutrition. The condition is mainly found in infants but nowadays the symptoms are getting more common in adults as well. Symptoms among adults are tiredness, weight loss and depressions (Celiaki 2014). The only helpful treatment is eating gluten-free products in order to balance out the absorption (Blades 1997).

2.3.2. Lactose intolerance

Due to a shortage of the enzyme “lactase”, the small bowel mucosa cannot break down milk sugar (lactose). The SCF states that 14 % of the Swedes are affected by lactose intolerance. Three types of lack of lactase exist: congenital lactase deficiency, primary and secondary lactase deficiency. While the congenital form is very rare, persons with primary lactose intolerance can consume small amounts of dairy products. The secondary type occurs in combination with gluten intolerance, bowel infections or inflammations. Symptoms are watery diarrhea, flatulence and stomach pain (Celiaki 2014a).

After a case of serious allergic reaction to soy that occurred in Sweden 1992, Foucard and Malmheden (1999) studied food reactions between 1993 and 1996. Their findings showed that out of 61 cases of food reactions, 45 were caused by peanuts, tree nuts and soy and that especially soy empowered the severe reactions of already nut allergic persons. In the following these two types are further explained.

2.3.3. Peanuts and tree nuts allergy

About 3 million Americans (0.9 %) are allergic to peanuts and tree nuts such as pecans. Due to Rich’s Nut Allergy Ecosystem Survey from 2014, more than half of their questioned 1,024 mothers (56 %) received information about their child’s school policy concerning nuts. This is crucial, as allergic reactions occur not only via ingestion, however also through contact and inhalation (Sicherer et al. 1999; Comstock et al. 2008). In Sweden about 5 out of 100 children (5 %) between four and 18 years are allergic to peanuts or tree nuts. Allergic reactions differ from mild reactions with oral itching, rashes and stomach problems to strong and life-threatening reactions such as swellings of the throat (Ledin 2013). As nut-related allergic reactions can be easily triggered, 67 % of American parents take nut allergies into account when buying food and snacks for children parties. Even one quarter (25 %) of these parents were especially asked to not provide nut-containing products at the event (Rich 2014).
2.3.4. Soy allergy

The relatively rare soy protein allergy affects less than 1 % of the Swedish citizens. Symptoms include swollen lips, eczema, stomach pains, vomiting or diarrhea (The Swedish Society for Coeliac 2013). Besides soy-containing foods such as tofu, customers with a soy protein allergy or intolerance need to carefully read the ingredients list on the food packaging labels, as also baked goods, cereals and even canned tuna can contain soy (Seidu 2014).

2.4. Health effects of free-from products for non-allergic consumers

While a relatively small market is diagnosed with a food allergy and intolerance such as gluten, “a much larger audience appears to be motivated by the growing and controversial perception that gluten causes different kinds of health problems from weight gain to arthritis” (Schultz 2013). The trend of buying free-from products is stimulated by discussions concerning whether or not free-from products are better for everybody. Contrary to scientific research, lifestyle changes of how people for instance eat or dress have been influenced by rich and famous public figures throughout decades. While their statements and opinions were mainly printed in lifestyle magazines back in the days, the public is now flooded with their ideas online. Today, as information is exchanged so fast on the Internet, it also leads to rapid trend developments as in the dietary section (Keller 2011). For example, cardiologist and bestselling book author Dr. William Davis claims in his book “Wheat Belly” that “modern, mass-produced wheat causes problems ranging from arthritis to schizophrenia” which he promoted online, in talk shows and interviews (Davis 2014). Other famous personalities such as singer and actress Miley Cyrus highlight the advantages of free-from diets to their fans on Social Media channels such as Twitter. Figure 1 shows her tweet embracing gluten-free diets (Twitter 2012).

![Miley Cyrus' tweet embracing gluten-free diets](Twitter 2012)

Both their opinions about a gluten-free nutrition spread many times faster than the National Wheat Improvement Committee’s (NWIC) counter-statement that gluten-free diets are unhealthy for non-allergic consumers, can result in a fiber deficiency and will not improve the person’s health in the long run (NWIC 2014).
2.5. Reasons for choosing free-from products

Petrak (2014) claims that “free-from foods have arguably never been more in demand and available”. This development and its international success are based on the customer demand as well as on the product availability. In the following, the reasons for customers deciding to choose free-from products will be presented.

In general, there are two main reasons for customers to choose free-from products: they either have to follow a free-from diet, due to a diagnosed food allergy/intolerance or choose the products for other, non-medical reasons. Apart from medical reasons, general advantages for both sides are that with more companies entering the free-from market, product diversity and availability rises. Many consumers feel that their quality of life improves by consuming free-from products (Petrak 2014). The NPD Group’s 2013 Dieting Monitor showed that one third of US adults plan to cut down on their gluten consumption or even eat completely gluten free. Moreover, major bakery groups state that 75 % of their gluten-free bread purchasers make a lifestyle choice and are not suffering from a gluten allergy or intolerance (Mellentin 2014).

The International Food Information Council Foundation’s 2012 study about food and health states that 55 % of Americans try to lose weight and that nine out of ten consider the ingredients of their food and beverages. Even though over 60 % of the study’s respondents claim that they are on a diet for health issues, other surveys such as the Choinière and Lando’s 2008 Health and Diet Survey found, that 70 % of their not overweight participants use dietary products as preventives.

Next to celebrities’ engagement in free-from foods, also lifestyle related diseases such as diabetes or arthritis and constantly rising healthcare costs stimulated the trend towards functional foods. “Moreover, demographic changes, among which the aging of the population in most developed countries, the higher life expectancy and the desire for an improved quality of life, have stimulated research to identify or produce food with nutritional functions.” (Bigliardi & Galati 2013, p.125).

2.6. Reasons for producers to manufacture free-from foods

The food industry is one of the most important branches in most countries of the world, but it is also an industry, which stands under constant pressure: Customers need to be satisfied and their demand for new products needs to be fulfilled. Furthermore, a strong international competition requires continuously improvements in services and processes (Menrad 2004).

As the demand for free-from products rose, due to higher rates of diagnosed food allergies as well as a change in regular customer’s mindset, producers and manufacturers adapted to the consumer’s wishes. First, free-from foods were available in specialty stores and at gourmet retailers. As the demand increased, these products can now be found in regular food supermarkets, especially in Europe, USA and Japan. With the constant trend towards free-from products over the last decades,
not only start-up companies but also the major food brands took the opportunity to
invest into the market (Petrak 2014).

In the US, the gluten-free food and beverage industry has grown 44 % from 2011 to
2013 and has a current market volume of $10.5 billion. The bakery industry, for
example, recorded a 43 % increase in gluten-free bread sales in 2014. In the country
24 % “of consumers currently eat, or have someone in their household who eats,
gluten-free foods” (Mintel 2013, p. 10).

Moreover, today’s free-from manufacturers have the technological possibility to
produce free-from food with great taste. Over the years it became clear that free-
from consumers are not willing to compromise when it comes to taste. Companies,
which successfully managed the production of tasteful free-from foods, are rewarded
with loyal clients and an increasing market share (Petrak 2014b). Furthermore, Petrak
(2014b) states that especially free-from snacks are trendy, as they offer great taste
both to allergic/intolerant persons as well as customers on a lifestyle diet.

2.7. Functional food market

The market of functional food is constantly growing and the research and
development departments are increasing along this popular trend. The market has
experienced many product failures on the way; therefore, it is necessary for
companies to offer the products through the right channels to the right audience.
The target group includes not only consumers with food allergies but has expanded
towards highly health-aware consumers. While demographic characteristics play a
minor role, health motivation, the diet effectiveness of the products as well as
nutrition knowledge seems to make consumers accept functional foods (Verbeke et

“In general, the interest of consumers in Functional Food in the Central and
Northern European countries is higher than in Mediterranean countries” (Menrad
2003, p. 182). Nowadays, Japan is the world’s largest market for functional foods,
followed by the US and Europe (especially UK, Germany, France and Italy). These
three markets represent 90 % of the total sales in this food category (Benkouider
2005). In the US, functional foods represent 2 % of the total US food market
(Lebensmittelzeitung 2000). For the European market, the estimated share of
functional foods on the total food market over the next ten years is 5 % (Menrad
2003). Especially the gluten-free industry is booming: sales increased 2014 with 14 %
to $38.2 billion compared to 2013 and even with 60 % compared to 2011 (Dudlicek
2015). Functional foods are mainly launched in the dairy, confectionery and baby
food market as well as in bakeries and in the soft-drink industry (Kotilainen et al.
2006; Menrad 2003).

A study made by Datamonitor (see Figure 2) shows the distribution (in %) of all
segments in the food and drinks market in Germany. The results come from the
analysis of newly launched products within the market. For the bakery segment, it
shows that 13 % contributed to functional food innovations (Menrad 2003).
The development of functional food products is extremely time-consuming and expensive. Therefore, the two main requirements to succeed in this market are the right resources and also know-how in nutritional and food technology research. As mentioned before, the future market estimations for functional food show an increase in market volume. Additionally, it is assumed to represent a multi-niche market concentrated on a small number of segments and few product categories in the upcoming years. However, the difficulties of analyzing the supply structure are a continuous issue likewise defining the functional food industry. There are several multinational companies such as Nestlé with its LCI yoghurt and Unilever with Becel proactive which have established well-known brands within the industry. These companies launched innovative and successful products in the past and have the financial and technological resources needed for further developments. Due to cost-extensive product introductions on the market, it is necessary to invest into product innovation in order to survive on the market. This also explains the limited amount of brands engaging in functional foods (Menrad 2003).

Besides, the free-from concept is not yet as renowned as the companies want it to be. The awareness of the term “functional food” and the meaning of it are not obvious to the majority of the consumers. In countries such as Germany, the United Kingdom and France, 75 % of the consumers have never heard of the term “Functional Food”. However, many of them are aware of the need for allergen-friendly products and show a great acknowledgement towards the concept. Therefore, the future for the market is determined by the acceptance and familiarity of functional food and as a result of an increased awareness, the market’s innovations have the possibility to develop even further (Menrad 2003).
2.8. Functional food marketing

In order to analyze how to market functional food correctly, McCarthy’s (1964) marketing mix instruments, the so-called 4 P’s; product, price, placement, and promotion will be described in the following chapter. These marketing components will be explained in relation to this free-from category and give an impression of how to best market these types of products. Even though McCarthy’s (1964) 4P classification is widely accepted among researchers and marketers, it is also criticized for its limitations: As van Waterschoot and van den Bulte (1992), many authors divided the fourth dimension promotion into communication and promotion. Furthermore, other researchers focus on the communication rather than on promotion. Other authors criticize the model by its lack of realism in actual marketing considerations (Reidenbach & Olivia 1981) and its ignorance of any costs, sales and competition interactions (Wind & Robertson 1983).

In order to give a structured overview of essential marketing parts in the functional food section, McCarthy’s (1964) traditional classification suited for the description and structuring of the purpose of functional and free-from food marketing.

2.8.1. Product

A product is created to satisfy a certain customer demand. In the marketing mix, marketers need to define the lifespan of a product; its individual life cycle and can motivate consumers to purchase it by adapting its design, content and layout to the wishes of the target group (McCarthy 1964). In the following, special attention is given to the packaging and labeling of functional foods.

Due to high competition in the functional food branch the product packaging is crucial (Henson et al. 2008; Ares & Gámbaro 2007). Wells et al. (2007, p. 677) state that 73 % of their interviewed supermarket customers “rely on packaging to aid their decision-making process at the point of purchase.” “Packaging of free-from products can visually flag that a product is free from a particular allergen or set of allergens, to attract the attention of busy shoppers browsing the aisle or shelf” (Petrak 2014a). Free-from retailers especially use the color green for packaging. This color is already related to healthy, ecological and mostly vegetarian products in the food industry. Besides, many retailers agree that customers remember labels as a first impression (Petrak 2014a). Early in 1967, Kollat and Willett state that customers tend, when shopping on impulse, to buy familiar brands. This leads back to the first task of marketers: spread the knowledge about the brand and make customers familiar with it. Moreover, retailers claim that products labeled with catchy phrases such as “gluten-free” almost sell by themselves. Besides, Choinière and Lando (2008) experienced that their survey respondents often (38 %) and sometimes (34 %) chose food packages by the on-printed statements, such as “low fat” or “gluten-free” and the majority (90 %) believed that at least some of the food labels are accurate. 67 % of their participants picked, at least sometimes, a product with healthy symbols or icons printed on it.
As the health claim trend increased, national and international legal requirements and limitations were needed to clearly categorize food and drinks (Petrak 2014a). For instance the American Food and Drug Administration (FDA) issued a regulation defining “gluten-free” for food labels in 2013. Here the gluten limit of fewer than 20 parts per million (ppm) for gluten-free products was set, different spellings such as “free of gluten” or “without gluten” were regulated and a label usage was discussed (FDA 2013).

Regarding information on the products, the ingredient list with essential allergen information needs to be prominently presented. For example, labels matter especially for “nuts-free” products due to its heavy allergic reactions. According to Rich’s (2014) survey, one in four US mothers checks food labels thoroughly, because of nut-free school requirements and 27 % of the questioned individuals even claim that they check the labels first. In Europe the new EU law on food information to consumers “2000/13/EC” and “90/496/EEC” –apply from December, 13th 2016- will improve the visibility of crucial allergen information on foodstuffs (Europa 2014). As allergic or intolerant persons check the allergy advice box and ingredients list first, clearer information on the labels simplifies their ingredients control (Barnett et al. 2011).

2.8.2. Price

Mintel’s (2013) survey showed that 57 % of the consumers accept the higher prices for gluten-free products. The retail prices are often twice as high compared to regular products, but the survey also showed that gluten-free customers exist across all income levels. In general the price premium is 30-50 % higher in the functional food segments, showing that the majority of the consumers believe it is worth spending extra money to stay healthy (Menrad 2003). Furthermore, Stevens and Rashi’s (2008) study comparing gluten-free and regular retail prices in U.S. grocery stores showed gluten-free products were 242 % more expensive than their regular counter products. In general, the branch’s higher retail prices are based on more expensive raw material costs e.g. for wheat-replacing flours, higher technical costs due to higher support needed for the extended ingredient processing resulting in higher manufacturing and labor costs (Bruce-Gardyne 2015). A phenomenon especially seen in the functional food market is that prices are set on a more premium level in order to cover the cost-intensive development expenses (Heasman & Mellentin 2001).

In general, “in most markets –although there are a few exceptions – a highly priced product will tend to perform as a niche brand, while a product priced closer to regular products will yield higher volumes” (Heasman & Mellentin 2001, p. 246). In contrast, successful functional foods have a mainstream volume with just under niche-market prices (Heasman & Mellentin 2001). In Tellis’ (1986) taxonomy of pricing strategies, functional foods are premium priced. This strategy “exploits consumer heterogeneity in demand” and joint economies of scale (Tellis 1986, p. 155) and is used when offering basic and premium products. Here, the premium version differs only by some additional features and/or options from the regular version. Nevertheless, the add-on’s worth stands in no realistic relation to the higher price (Tellis 1986). In the bakery industry, an example could be a basic bread loaf for 20 Swedish crowns (kr) per kilo and a gluten-free bread for 40 kr/kilo. The
additional feature of not including gluten ingredients makes the second loaf unrealistically more expensive than the normal one.

This leads to the pricing challenge for functional food companies: charging the maximum price without a niche-market positioning. Moreover, pricing in the functional food market is an even greater challenge because it has to take the two free-from target groups into consideration. First the allergic and food-intolerant consumers who will buy at almost any price and second the health-conscious lifestyle consumers.

Considering the price elasticity of demand, allergic and food-intolerant consumers react inelastic to price changes in their demand. “The elasticity of demand measures the responsiveness of demand to changes in an underlying factor, such as the price of an item […]” (Png 2012, p. 37). An inelastic change means that the demand only weakly responds to price changes. This reaction can be seen especially in vital goods, such as food or gas, as these goods have hardly any substitutes (Png 2012). Leaving abandonment of the product aside, a lactose-intolerant person for instance will buy lactose-free milk even if prices rise from 20 to 30 kr because it is a vital good for this person. Figure 3 exemplifies this demand behavior.

![Figure 3: inelastic price elasticity (Own creation 2015)](image)

In contrast, lifestyle consumers react abnormal-elastic in their demand to a certain point, meaning that the more expensive the good, the higher the demand. An example (see Figure 4) could be that 100 persons buy lactose-free milk for 20 kr. If prices rise to 30 kr, 150 people would buy the milk. Logically, this phenomenon is only applicable to a certain maximum price from which lifestyle consumers would buy the milk. If the maximum price is overstepped, the target group would change to cheaper substitute milk products. The acceptance of premium price in lifestyle consumers can be justified with the communicated promises that go along with the product such as better digestibility and greater health (Heasman & Mellentin 2001).
In order to maximize profits, free-from companies have to determine the maximum price at the maximum demand of the lifestyle consumers. Hereby, the allergic and food-intolerant customers will follow due to their inelastic demand. However, if companies decide to go into the mass-production market as in supermarkets –with higher sales volumes but also more price-sensitive customers- Arendt and Dal Bello (2011) suggest a less premium pricing strategy to be more successful.

### 2.8.3. Placement

In most of today’s stores and supermarkets, free-from products are displayed in special free-from sections. Besides, products which are not presented in the specialty section are signed with signage and shelf tags (Petrak 2014a). Some retail stores in the US, e.g. Mariano’s, present their free-from products with special signs and display them in green shelves (Petrak 2014a). By that, the target group can immediately and easily identify their food options and customers might even get motivated to purchase more than planned, as all free-from products are gathered in one place.

Moreover, the product distribution depends on the type of product. Ready-to-use products should be distributed directly to supermarket chains or other customer points of contact. Products for further processing such as Swebake’s cake bases achieve best results when distributed via wholesalers (Pepels 2004). All in all, the most suitable distribution channel for the product type in question, combined with a good in-store placement are advisable in order to increase sales.

### 2.8.4. Promotion

McCarthy (1964) defines promotion as all communication methods that the company’s marketer uses to inform the stakeholders about the product. This includes advertising via commercials, radio or Internet ads, public relations (PR) via press releases, conferences or seminars and sales promotion. In relation to free-from products, different research about communication towards consumers will be presented.
First, a familiarity with functional foods and especially free-from products needs to be created. Menrad (2003, p.185) claims that the “future market development is influenced by the degree of familiarity and acceptance of Functional Food”. This means that it is more likely for consumers to make a purchase if they know the brand.

Next to the logo, health claims and attractive pictures, the wording on free-from products is crucial for sales. Especially health-motivated customers focus on the nutrition information printed on the packages (Visschers et al. 2010). While the widely used word “organic” for instance communicates specific standards, which consumers do not recall, the term “natural” is a very broad adjective (Aarset et al. 2004). Furthermore, Aarset and colleagues (2004) showed that customers are very skeptical with the term “natural” and relate “organic” to expensive. Dudlicek (2015) suggests that “free-from” can work as a clear, honest and understandable sign. As mentioned before, customers are only willing to buy healthy products, when the taste is similar to non-functional foods (Petrak 2014b), which implies that companies have to not only promote “free-from”, but also the great taste of it (Dudlicek 2015). In addition, explanations on the products should be minimized to avoid overwhelming customers. On top of that the best results were shown when no medical explanation was given on the package.

To sum up, free-from products should be prominently displayed in the store and be promoted with special signs, which appeal with their simple and understandable claims. Last, the more familiar customers become with these free-from products, the greater the acceptance in the population.

2.9. Organic food marketing

Next to functional food marketing, organic food marketing can also be taken into consideration, in order to find suitable implications for the free-from market. For instance, Spiller and Zühldorf (2009) released a study among German organic craft bakeries, regarding their product range, marketing as well as their success factors. Their study showed that even though organic craft bakeries are confronted with a strong competition from supermarkets, they have not increased their marketing activities and are still focusing on free samples and introductory offers. Moreover, the service personnel in the shops lack the specific knowledge about the organic cultivation and manufacturing processes. In contrast, marketing-deducted bakeries have a generally higher success rate than bakeries with no marketing activities (Spiller & Zühldorf 2009).

While Spiller and Zühldorf (2009) investigate German organic craft bakeries, Latacz-Lohmann and Foster (1997) discuss organic food in German and English supermarkets. Here, they state, that both countries show great sales potential for organic foods, however, their advantages need to be better communicated and promoted to the consumers: It is “important that retailers are aware of the reasons why people choose to buy organic food in their outlet and the different types of consumer they wish to target” (Latacz-Lohmann & Foster 1997, p. 281).
These findings implicate that free-from products and bakeries, which completely dedicate their business to these products, need to improve their marketing towards their target group.
3. Method

The quantitative research method in form of an online survey investigated how Swedish bakeries and patisseries adopt to the trend of free-from products. This chapter will discuss the chosen method, its implementation as well as the survey and variable measurement. Last, the reliability and validity, ethical considerations and limitations of the survey are explained.

3.1. Choice of Method

As explained in Chapter 1.3, this Master’s Thesis seeks to investigate the marketing of free-from products in Swedish bakeries and patisseries. The broad target group of bakeries and patisseries all over Sweden underpins the necessity of a quantitative research method in form of a survey to capture a wide range of companies. In general, this method generates results that can be measured in statistics and the data collection can be used in different analytical programs (Patel & Davidson 2003). In this thesis, a quantitative method with a survey was more reasonable than a qualitative one, since the formulated research question aims at a broad audience. With an online survey it was possible to easily and in a time-saving way reach bakeries and patisseries all over Sweden. Moreover, when covering a broad geographical area, the costs per respondent are essentially lower than with personal interviews or letters. Besides, respondents do not feel stressed to finish the survey within a certain time frame and can answer the questions in a comfortable environment. Additional to the mentioned advantages, survey results are easy to understand since the response alternatives are the same for all respondents. Results are less suggesting as no further questions can be asked to an interviewer. However, a survey research also bears several disadvantages. One of the major drawbacks is the possible loss of response. In addition, it is common that some respondents leave a few questions unanswered, which has to be considered by the researchers. Another downside is the limited number of questions that can be posed in a survey. In order to maintain the participants’ interest in finishing the survey, a survey should require maximum 30 minutes to complete. Furthermore, during the survey the respondents have no opportunity to clarify any occurring misunderstandings, which is why it is essential to ask clear and elaborated questions (Ejlertsson 2005).

3.2. Implementation

The subject selections for the study are bakeries and patisseries in Sweden. Therefore, the used selection criterion was geographical and any bakery/patisserie would fit as a participant in the research. The results will later show if there were any differences between the bakeries/patisseries with and without allergen free products. The survey consists of a total amount of 21 questions, in which the participants were mainly asked about their free-from products, their perception and experience of this concept and how they implement this in their marketing strategy. The question catalogue can be found in Appendix 1.
In the implementation of this survey the authors developed the questions thoroughly to achieve an accurate result. The logic and order of the questions were also constructed in an elaborate way. Bakeries with allergen-free products had a total of 18 questions and bakeries/patisseries without allergen free products had 8 questions to answer. After the participant answered question number 6 “Do you offer allergen free products in your bakery/patisserie?” with “yes”, he or she was forwarded to following questions regarding their allergen free assortment. A “no” to this question implicated that this company does not offer allergen free products and was therefore forwarded to 3 questions concerning their opinion about allergen free products in general.

![Figure 5: Survey question logic (Own creation 2015)](image)

When sending out the survey to different companies in Sweden, the Swedish website www.allabolag.se was a useful database to find email addresses of potential participants. The overall number of emails sent to different bakeries was 301. Two weeks were given to the companies to complete the survey and in between a reminder was sent out to raise the response rate.

The survey—which was conducted in Swedish- starts with a short introduction, explaining the purpose of the research, followed by questions about the company in general, such as location, number of employees, etc. After the first part, questions about how the participants adapt to the trend of allergen free products were asked and there is also a description of the meaning of the free-from term.

The purpose of the survey was mainly to gather information and create a deeper understanding of how the companies adapt to the trend of free-from foods, but also how they market these products. The survey results, which can be reviewed in Appendix 2, helped to understand how Swedish bakeries and patisseries market the trend of allergen free product. Additionally, the survey outcomes function as the base for useful marketing implications in general and for Swebake AB in detail in the conclusion.

All in all, 50 % (19 survey participants) left their email address on the last slide of the survey. Their shown interest in the result of the survey implies that they want to learn more about the market and see how the average bakery and patisserie handle its daily...
business challenges. The survey outcomes were sent to them via email the day after the survey closing date.

### 3.3. Survey and variable measurement

As mentioned before the survey consists of 21 questions in total. Table 2 shows the types and amount of conducted questions in this survey. Single-choice questions were used when the participants had to choose from several options with no necessity for a comment field. This concerns question 2 “How many employees does your company have?”; question 3 “In which region do you operate?” and question 16 “How much of the company’s sales are generated from allergen free products?”. The answers’ possibilities of question 2: 1-5, 5-10 and >10 are based on the average amount of employees in Swedish bakeries and patisseries of 7.2 (Lindow 2012). The same idea was adapted for question 16. Question 3 was divided into “Stockholm, Göteborg, Malmö”, “Uppsala, Västerås, Örebro, Linköping, Helsingborg” and “remaining parts of Sweden” because here, the participant could easily choose whether their business is located in one of the three biggest cities, the next biggest cities or in other parts of Sweden. This division was chosen by the business density decreasing from option 1 to 3 (Lindow 2012).

<table>
<thead>
<tr>
<th>Type of question</th>
<th>Amount in the survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-choice</td>
<td>3</td>
</tr>
<tr>
<td>Single-choice with comment field</td>
<td>3</td>
</tr>
<tr>
<td>Yes/No</td>
<td>5</td>
</tr>
<tr>
<td>Multiple-choice with comment field</td>
<td>9</td>
</tr>
<tr>
<td>Five point Likert scale</td>
<td>1</td>
</tr>
</tbody>
</table>

The survey also contains five dichotomous Yes/No-questions as no further information was needed. For example question 5 asks “Do you offer allergen free products?” Here the decision for yes and no decides which follow-up questions the participant gets. Question 10 also needs a clear Yes/No answer whether or not the allergen free products are marketed differently (Byman & Bell 2011).

Multiple-choice questions were always displayed with a comment field to give the participants another chance to further explain their decisions. The same thinking stands behind the single-choice questions with a comment field.

Last, a five point Likert scale was adapted in question 17 to receive a valid result on how the participant experiences competition. The scale is used as standard in
3.4. Reliability and validity

Reliability is defined as research with repeating measurements, which will give the same result time after time. The questions must therefore be asked in the exact same way and situation. If the questions are poorly constructed, the random variation in the response can increase and the research will have a low reliability (Ejlertsson 2005). It is hard to guarantee the reliability of a study, however, the authors are confident that their questions have been constructed and developed through a reliable system via www.surveymonkey.com. The response rate was consistent throughout the entire survey; the questions followed a logical order and had a supporting design. The participants seemed to have understood each question correctly and they had the opportunity to explain further if there were no suitable alternative to choose from. The participants also had the possibility to contact the authors in case of questions.

“The issue of measurement validity has to do with whether or not a measure of a concept really measures that concept” (Bryman & Bell 2011, p. 159). It is therefore essential to take the time and create elaborate questions and make them relevant to the research (Ejlertsson 2005). Furthermore, Bryman and Bell (2011) explain that there are different possibilities to measure validity:

- **Face validity**: people with experience in the field are asked whether or not the measure reflects the research question.
- **Concurrent validity**: applied criteria are known to differ and are important to the concept.
- **Construct validity**: the researcher “is encouraged to deduce hypotheses from a theory that is relevant to the concept”. (Bryman & Bell 2011, p. 160)
- **Convergent validity**: using different research methods on the same topic.

The conducted survey among Swedish bakeries and patisseries fulfills the measurement of face validity as it was presented and discussed with an expert before initiated. Moreover, construct validity is given as the authors combined different results in Chapter 5 - Analysis. Here the results were compared between bakeries and patisseries with and without allergen free products. Bryman and Bell (2011) also state that validity can be divided into internal, external and ecological validity:

- **Internal validity**: refers to the consistency of a drawn conclusion. This is given when it is indisputable that variable A causes variable B.
- **External validity**: “is concerned with the question of whether the results of a study can be generalized beyond the specific research context”. (Bryman & Bell 2011, p. 43)
- **Ecological validity**: means that the research methods findings are valuable and useable by the general public.
The survey results do not fulfill the requirements of external validity, as survey results are subjective and therefore not repeatable. Furthermore, an ecological validity is rather unlikely, as the results specifically affect bakeries and patisseries. Last, internal validity is not given as a survey does not scientifically evaluate conclusions rather draws them out of the survey results.

3.5. Ethical considerations

The ethical considerations are one of the most important parts when writing a thesis and researching a certain question or problem. There are different types of ethical considerations, depending on what kind of research is being made or method is being used. The researcher(s) must consider how the research should be implemented without damaging the participants’ integrity (Ekengren & Hinnfors 2012). Therefore ethical considerations are very important when planning and creating a survey. Relevant factors to consider are personal information about violation and penalty, ethics, religion and political opinions.

According to Ejlertsson (2005), there are four requirements that need to be taken into account:

- **Information**: the participants for the survey must be informed about its purpose and that it is voluntarily to participate.

- **Consent**: the contributors have the right to decide whether they want to contribute to the research or not. For example, a given response in a survey corroborates the participant’s agreement to this term.

- **Confidentiality**: the participants are given confidentiality, which means that they are anonymous and that their personal data will be kept safe.

- **Use requirements**: the collected data about individuals can only be used for the research and not in other contexts.

The ethics have been considered in the development and distribution of the survey. All information about the purpose of this thesis can be found in the introduction of the survey. There is a short yet clear statement in the introduction that no information will be used by third parties and that it will only be used for further analysis in this research. Furthermore, each participant had the opportunity to receive the results after the completion of the survey which promoted the professional and academic purpose of this survey.

3.6. Limitations

Besides the described limitations of surveys in Chapter 3.1, the conducted survey is limited in its scope. Only bakeries and patisseries with a website were considered as
possible survey participants. When it was not possible to find an email address, a link to their Facebook page nor a contact formulary on their website, the company was rejected and excluded from the survey. Also, the authors did not evaluate all companies listed under “bageri” and “konditori” on www.allabolag.se but stopped after they identified 301 of them. Moreover, with 38 participants, the survey has a respectable size but its results cannot be generalized for the whole Swedish bakery and patisserie industry.
4. Research Result

In this chapter the survey results will be presented in three different categories in the chronicle order of the questions appeared in the survey. The result presents the respondents’ perceptions about the current allergen free market in relation to the research question of how Swedish bakeries and patisseries market the trend of allergen free products.

Due to the research in related food trends, a survey was developed in which Swedish bakeries were asked about their current product lines and their opinion and experience with free from-products. The survey is executed via the survey-generating website www.surveymonkey.com.

The needed email-addresses for the emailing were generated via www.allabolag.se and the key words “bageri” and “konditori” were used throughout the research. Through the data collection, 126 email addresses via “bageri” and 150 addresses via “konditori” were generated. 276 emails were sent out via the online survey website www.surveymonkey.com and as no email addresses were found, 25 bakeries were contacted over a contact formulary on their website or via Facebook.

38 representatives of Swedish bakeries and patisseries took part in the survey which equals an achieved response rate of 13.06 %. 21 participants answered the survey via the web link, sent to them via the contact field on their website or their Facebook page. The remaining 17 respondents participated through the survey invitation sent out by email.

All questions will be presented below in the following categories: company information, companies with and without allergen free products. After every discussed question, the number of the question (Q) and respondents (n) will be given.

4.1. Company information

The majority of the companies have their own manufacturing site (89.19 %), followed by 8.11 %, which have both their own manufacturing and purchase from third party suppliers and 2.70 % which only purchase from third parties (Q1; n=37)

More than every second company, which participated, had more than ten employees (51.43%). One fifth had between five and ten employees (20 %) and 28.57 % had between one and five staff members. (Q2; n=35)

29.73 % of the companies are located in the cities of Stockholm, Göteborg and Malmö and 10.81 % are located either in Uppsala, Västerås, Örebro, Linköping or Helsingborg. However, most of the companies are located in the remaining parts of Sweden (59.46 %). (Q3; n=37)

The question “Have you noticed an increased demand of allergen free products e.g. gluten-free, lactose-free etc. in your bakery/patisserie?” showed that 86.84 % have
noticed this upcoming trend, compared to 13.16 %, who did not notice any particular change in the demand. (Q4; n=38)

This led to question five, whether or not the company offers allergen free products. 86.49 % offer allergen free products, while the remaining part of 13.51 % did not yet adapt to this trend. (Q5; n=37)

4.2. Companies with allergen free products

In this section the survey results for companies with allergen free products (86.49 %) will be presented in the categories: products, marketing, and competition.

4.2.1. Product

The sixth question in the survey asks the participants what kind of allergen free products they are offering. This question allowed more than one answer. The choices were: gluten-free, lactose-free, nut-free, soy-free, or other (please specify). Many companies offer products without the three most common allergen ingredients lactose (96.30%), nut (70.37 %), and gluten (66.67%), followed by soy (44.44 %) and other ingredients, such as eggs, butter, sugar, and gelatin (37.04 %). (n=27)

Question seven: “Do you have allergen free products in your standard product range or do you order them from a third party?” showed an almost identical result with 51.85 % for standard product range and 44.44 % which have both: own production and delivery items. (n=27)

The survey claims that customer demands from people with food intolerances are the most important reason for bakeries and patisseries to offer allergen free products (85.19 %), followed by 59.26 % who went into the market to differentiate themselves from their competition and to increase their market share. Increasing sales (25.93 %) and the customer demand from health driven customers (7.41 %) as well as other reasons such as specific customer orders (11.11 %) motivated them to offer allergen free products. (n=27)

4.2.2. Marketing and sales

The most popular marketing channels among bakeries and patisseries are company webpage (61.54 %), in store marketing (57.69 %), and social media (50 %). Only 7.69 % market their products via advertisements in newspapers and only 3.85 % send out promotional pamphlets. In the last option, “other (please specify)”, one company mentioned that they only promote the term milk-free on their packaging. Another company states that they do not market their products at all, while yet others demonstrate their manufacturing process or use promotional signs in the shop. (Q9; n=26)
Question 10 gave a clear answer to the question whether the allergen free products were marketed differently to others: 87.50 % stated that their marketing did not differ for allergen free products. (n=24)

“What is, in your opinion, the most important factor for sales of free-from products?” Approximately three quarters (76.92 %) of the respondents state that satisfied customers are their main focus, followed by the taste (15.38 %), health reasons (3.85 %) and other such as appearance (3.85 %). (Q11; n=26)

For question 12: “How does your bakery/patisserie present its allergen free products?” the participants had several answering possibilities. The majority of the bakeries and patisseries did not reserve an extra place for the allergen free products (69.23 %), compared to 19.23 % of the questioned companies, which present them separately. Only 15.38 % chose “other (please specify)”. (n=26) Moreover, 59.26 % of the respondents answered that their company does not charge higher prices for their allergen products, while 40.74 % do. (Q13; n=27)

The companies, which take higher prices for their allergen products, explain this trend with increasing raw material costs (81.25 %), higher personnel costs (31.25%) and waste loss (18.75 %). One quarter (25 %) chose “other (please specify)” and state, for example, that they have no higher production costs, different purchase procedures and more expensive raw materials. (Q14; n=16)

Question 15 concludes that all responding companies, which enlarged their assortment towards allergen free products, have experienced a neutral or positive impact. 39.13 % have noticed an increasing number of customers and 34.78 % recorded higher sales. 47.83 % chose the option “other (please specify)”: while some bakeries, which state that they have always had these kinds of products, state the necessity to offer allergen free products. More answers conclude that their main reason is to satisfy customers. (n=23)

When the question “How much of the company’s sales is generated from allergen free products?” was asked, a bit more than half of the participants (55.56 %) responded 0-10 % of the sales. There were 37.04 % who answered >20 % which means that more than 20 % of their sales comes from allergen free products. A smaller share of the participants (7.41 %) selected the option 10-20 %. (Q16; n=27)

4.2.3. Competition

In question 17 the participants were asked “What level of competition do you experience in this market?” The options were ranked from very low, low, normal, high, to very high. The majority (53.85 %) responded “low”, followed by 26.92 % who answered “normal”. There were 11.54 % of the respondents who answered that they experience “high” competition and 7.69 % stated that they experience “very low” competition within this market. No participant responded to the option “very high”. (n=26)

Question 17 was connected to 18: “From which competitors?” Multiple answers were allowed. Every second (50 %) answered that they experience competition from other local bakeries and patisseries, followed by competition from supermarkets’ own
bakeries (38.46 %). No participants chose the alternative “Bigger bakery chains”, but there were 34.62 % who responded to the option “Other (please specify)”. Here some of the participants wrote “other special niche bakeries”, “do not know”, and “do not experience any competition in our area”. (n=26)

4.3. Companies without allergen free products

In the beginning of the survey the participants were asked, whether they offer allergen free products in their product range or not. The participants, who responded “no” to this question, were directed to question 19: “What is the reason behind why your company does not offer allergen free products?” Multiple answers were allowed. 75 % selected “We do not have the opportunity to produce allergen free products in our bakery/patisserie”, which was a clear majority. The rest, 25 % answered “no demand”. There were no respondents, who chose the options “bad profitability” or “competition is too high”. (n=4)

The multiple choice question 20 asked: “What would make your company introduce allergen free products into your existing products assortment?” Three of the options were equal to each other, where one out of three (33.33 %) answered “demand from customers with food intolerances, such as gluten, lactose etc.”, “can generate a higher market share/competitive advantage” (33.33%), and “Other (Please specify)” (33.33%). (n=3)

The last question of the survey was also directed to those companies which do not offer allergen free products. The majority, 75 % responded “yes” and 25 % responded “no” to the question “Would you take higher prices for allergen free products?” (Q21; n=4)

4.4. Result Summary

An overview of the most important survey findings for bakeries and patisseries with or without an allergen free assortment are presented below:

**Allergen free bakeries and patisseries**

- Do not market their free-from products differently
- Do not charge higher retail prices for them
- Do not present them differently
- Do only experience low competition

**Bakeries and patisseries without allergen free products**

- Their production site cannot cope to the allergen free manufacturing processes
- Would mostly charge higher retail prices
5. Analysis

The analysis connects the theoretical framework with the empirical findings. The discussion will be based on the problem identification. Then relevant findings will be examined with the theoretical framework, which has been presented earlier in the thesis.

In the previous chapter, each question was put into different categories, depending on the respondents’ answers, whether they offer allergen free products or not. In this chapter these two categories will be analyzed in the same order. Each category will be analyzed separately to investigate the reasons behind the different responses. However, the main purpose of this analysis is to compare the given literature with the survey results and by that find differences as well as similarities.

5.1. Allergen free bakeries and patisseries

In general, 32 out of 38 participating companies (86.49 %) offer allergen free products in their bakeries and patisseries. Moreover, these bakeries and patisseries have their own production site (90.63 %), more than 10 employees (50 %), are located outside the metropolitan areas (59.38 %), have noticed the increased demand in allergen free products (93.75 %) and offer free-from products overwhelmingly, because of their allergic customers’ demand (75 %) and to satisfy their needs. This is reasonable, as the European functional food market is said to rise by 5 % over the next decade also because the target group has extended towards consumers with a high health-awareness (Menrad 2003).

Concerning marketing in Swedish bakeries and patisseries, they mainly communicate via their homepage (53.13 %), in-store marketing (50 %) and social media such as Facebook (43.75 %). Similar to the findings from Spiller and Zühndorf (2009), who investigated the organic bakery market in Germany, the questioned Swedish bakeries and patisseries experience generally higher sales and more customers however, not based on their marketing. Moreover the survey shows that the free-from products are not marketed differently than the bakeries’ and patisseries’ other goods (63.63 %). Here, Spiller and Zühndorf (2009) state that bakeries and patisseries which engage in marketing activities, show general higher success rates. Furthermore, many do not have a separate allergen free section in their stores (59.38 %). This result is contrary to Pettrak’s (2014a) findings, which claim, that most stores and supermarket chains have free-from sections with shelf tags to increase sales. Obviously the supermarkets and specialty stores are ahead of the bakeries and patisseries in the matter of free-from marketing (Menrad 2003). Starting to imitate them could bring the examined companies at least at eye level with the food suppliers. Imitation could save the bakeries and patisseries enough time to create new innovative ways of marketing.

The survey results also claim that allergen free bakeries and patisseries do not charge higher prices for their products. This contrasts the given literature, such as Mintel’s survey from 2013. The Mintel survey (2013) claims that 57 % of the customers are in fact willing to pay higher prices, for e.g. gluten-free products. Besides gluten-free products are for example 242% more expensive than regular goods (Stevens & Rashid 2008). Higher prices can be understandable justified with higher raw material
and personnel costs. This result reflects the industrial price-setting explanation of Bruce-Gardyne (2015).

Moreover, 46.88% of the respondents generate between 0 and 10% of their total sales from allergen free products. Almost a third (32.25%) even earns more than 20% from this product group. These results are interesting since it shows that allergen free goods are no longer a niche product but have arrived in the midst of Swedish society.

Half of the companies (50%) state that they experience low or very low competition in this market. However, earlier research claims that the functional food branch shows a very high and intense competition. Thus, further research focusing on this contrast can be interesting (Henson et al. 2008). It also indicates that it is still a young market, which niches towards specially produced products. According to Petrak (2014), the term free-from food is still unknown to many consumers, yet the concept of producing such goods is increasing. So even though companies do not experience any competition at the moment, the market is growing and companies should start developing marketing strategies in order to keep up with the upcoming market changes.

Since most of the participants only experience competition from local bakeries and patisseries (43.75%), marketing strategies should be adjusted towards their specific local customers. With a wider product range, local allergen free bakeries and patisseries can distinguish themselves from their opponents. In order to gain more satisfied customers, thorough research needs to be conducted on the competitive advantages a company can use to claim a bigger market share. Therefore, it is important to continuously improve services and processes, while simultaneously focus on making decisions based on consumers' demands and needs (Menrad 2004).

To sum up, Swedish bakeries and patisseries have promising sales figures in the allergen free section, but could improve these numbers by focusing on marketing. While homepage and Facebook are introduced in most companies, the in-store marketing with special signs and a separate section is still missing. Furthermore, these products require a marketing focus on brand building via well-trained sales employees and familiarity-creating promotions (Menrad 2003). Besides, as the current competition in the market is still experienced as low, these Swedish bakeries and patisseries should start their marketing efforts now in order to be settled on the market when competition rises. By that, they also need to overthink their pricing strategy.

5.2. Bakeries/patisseries without allergen free products

Only six survey participants do not offer allergen free products. Some do not have the possibilities to produce allergen free products with their current equipment and machines. Others experience no demand for allergen free products from their customers. Nevertheless the majority of the respondents would introduce free-from products if customers demand them. Also a higher market share and competitive advantage would be reasons to introduce such products to their already existing
product range. One might ask why these companies do not adapt to this trend if they believe it would give them a higher market share or a competitive advantage. As the market volume for free-from products is still increasing, the bakeries/patisseries should get involved in this new market because now, with still low competition and high profit margins, they can establish themselves at the market rather easy.

Two companies also stated that they have noticed an increase in the trend of free-from food, but they have not yet introduced this into their business. The reason might be that these companies do not have the right competences to manufacture these products. As previously mentioned, many of the employees in the hospitality industry, generally, do not have the right knowledge about food allergies and intolerances (Pratten & Towers 2003). This might explain the situation in these companies; hence, the employees need more knowledge within the field. This could require hiring more personnel as well as investing in new production capacity that would drive costs for the company. However, these investments could be necessary for the firm’s survival, as customer demand begins to increase in their areas.

The majority of the participants (75 %) responded that they would take higher prices for allergen free products, if these were introduced to their product assortment. Conclusively, the general opinion among bakeries is that allergen free products should be placed in the higher price range. According to Menrad’s (2003) observation, the majority of the consumers believe that allergen free products are worth the extra money in exchange for staying healthy.

5.3. Key findings

In the following the most important results of the analysis are summarized.

**Allergen free bakeries and patisseries**

- Contrary to theory, most Swedish bakeries/patisseries use a general marketing approach for all products including allergen free goods (Menrad 2003; Spiller and Zühdorf 2009)
- They do not have a separate free-from section (Petrak 2014a)
- Could charge two times as much for their allergen free products as some of them currently do (Stevens & Rashid 2008; Bruce-Gardyne 2015).
- Low experienced competition despite of general high competition in the functional food market (Menrad 2004)

**Bakeries and patisseries without allergen free products**

- Would introduce allergen free products if needed
- Agree with the customers that allergen free products are worth higher prices (Menrad 2003)
6. Conclusion

The last chapter presents the conclusion and recommendations for Swebake AB based on the problem definition. The following discussion is based on the authors' point of view regarding the results.

6.1. How do Swedish bakeries and patisseries market the trend of allergen free products?

The lack of knowledge in this field, as well as missing information, which was mentioned in the problem definition, made it difficult to build up the literature review. Allergen free products, as a variation of functional foods, in combination with the conducted survey, made it possible to treat the research question properly.

The executed survey clearly showed that Swedish bakeries and patisseries have partly succeeded in introducing allergen free products to their clients. They generate good profits from them and have more customers and higher sales, than without allergen free products. Unfortunately the survey also showed that Swedish bakeries are not focusing on their marketing. Even though various authors state that food marketing can increase sales drastically, only a small percentage is following a marketing strategy. Despite having websites and social fan pages on Facebook, they do not fully exploit the advantages of marketing their allergen free assortment through more channels. Surprisingly, some bakeries and patisseries are not charging higher prices for their goods, despite the customers’ willingness to pay more for them.

Suggestions for Swedish allergen free bakeries and patisseries are, therefore, to increase their prices while pushing the marketing for allergen free products. As outlined in section 2.8, the goods should be presented in a separate section, with mainly green interior colors. This approach makes the items immediately identifiable for the customers and recovers the common association between the color green and health. Furthermore, only well-trained staff members who can explain the manufacturing process as well as important composition information should sell the allergen free products. By that trust into the bakery/patisserie and in the product can be generated. Moreover marketing collateral materials should be informative and easy to understand so that customers can get familiar with the free-from products.

6.2. Implications for Swebake AB

There are two main target groups Swebake should address marketing-wise in order to improve their brand recognition to create loyal customers: their actual customers, the wholesalers, as well as the end customers in the bakery/patisserie buying the finished product. Since Swebake’s customers are wholesalers in the professional market, their main focus should be marketing mainly towards them. One major point could be to work on how they should present their products upon delivery. As Swebake has not yet designed their packaging, they can adopt the following suggestions: the most essential information on the package should be that the containing cake bases are free from gluten, nuts, lactose, and soy. This needs to be printed on the packaging in
a way, which ensures that it is the first information the customers will read when receiving the product. It needs to have a professional layout, creating an immediate feeling of safety and health. In a separate document, which is added to the package, more information about the ingredients should be listed in a clearly constructed way to ensure the customer of the product quality. Moreover, the homepage can be enlarged for product-related information: ingredients list, recipe suggestions and other interesting information about food allergies and intolerances.

The wholesalers will sell Swebake’s cakes to other bakeries and patisseries making marketing all the way down to the end customer a challenge. Starting with building good relationships to the wholesalers can form a strong cooperation base that might be advantageous. Swebake can promote their brand through the wholesalers’ news magazines, websites and in other areas.

All in all, it is important to gain as much attention as possible, for example through participating in exhibitions and other branch-related trade fairs to share their knowledge on creating allergen free products. Also, if possible, it would be advisable to market the brand Swebake on the cake itself for example through simple items such as cake toppers, stating where the cake comes from and its allergen free nature.

The survey result stated that the majority of the bakeries and patisseries in Sweden do not really market their allergen free product range. Swebake could achieve a competitive advantage in being the first to use the right free-from marketing strategies. As Swebake’s free-from cake bases will make it easier for bakeries and patisseries to engage in allergen free products trends. It simplifies their production and guarantees their supply with allergen free products in a cost-effective and smooth way. Therefore, a possible cooperation can be beneficial for both sides since the bakeries will gain more customers due to an enlarged assortment and Swebake’s brand will be strengthened through their marketing efforts such as handouts and brochures. A promising strategy for Swebake is marketing collaterals in their packages. This involves providing the bakery/patisserie with information letters and emphasizing the benefits of distributing Swebake’s leaflets to customers.

Furthermore, the most essential part for Swebake, as a newly founded company, is to share the knowledge of being a safe and healthy company. The brand strategy should communicate the caring attributes of Swebake in order to create customer loyalty as well as long-term relationships. The goals for Swebake are to be chosen by the end customers for their flavors but also for their image of providing safe and healthy ingredients. As part of their brand strategy, Swebake could introduce a cachet in form of a label to the customers stating that this bakery/patisserie offers free-from products and at the same time naming Swebake as the partner company which ensures the quality of these products. When a bakery or patisserie puts up their sticker on the front door, customers will be able to immediately identify the firm as a supplier of free-from goods and it will give the bakery/patisserie credibility as a safe and modern company.

Last, Swebake should set its product prices below a premium level in order to stay attractive to the wholesalers. As mentioned in Chapter 2.8.2, a less premium pricing strategy is said to be more successful when mass-producing a product such as Swebake’s cake bases.
6.3. Further research

Further research is needed, since many areas of the free-from trend lack explicit research. Even though this Master’s Thesis helps to understand the marketing approaches of Swedish bakeries and patisseries, many other industries and branches remain unexplored. Therefore, a further approach could be to analyze why some Swedish bakeries and patisseries are not taking higher prices for their allergen free products and why the industry but especially the majority of the allergen free bakeries is not investing more in marketing.

As this thesis now discussed marketing from the seller’s point of view, it is also relevant to research the customer’s side: How do they want to be approached? What are their buying habits? What would make them choose a specific bakery/patisserie over another?

To sum up, these areas are worth exploring and can give some new ideas for further research in the field of free-from products.
References


Appendix 1

VALKOMMEN!

Hej!


Effortsam att marknaden för allergivänliga produkter fortfarande är ganska ung, är vårt syfte att undersöka hur konditori- och bagerier i Sverige marknadsför detta koncept och förhoppningsvis kunna bidra till framtona forskning inom detta område. Om ni är intresserade av undersökningens resultatet får ni gärna lämna en e-post till av enkäten.

Om ni har några frågor angående enkäten kan ni nå oss på följande:

- Katharina Ehrnsperger: 0729 - 63 01 86 eller katharina.ehrnsperger@gmail.com
- Johanna Pihlgren: 0707 - 69 59 42 eller pihlgrenj@gmail.com

Tack så mycket!

OBSERVERA: Vi förseknar att inga uppgifter kommer att användas av tredje part. Informationen kommer endast användas för vidare analys i vår uppsats.
Företagsinformation

Har ni egen tillverkning eller köper ni från ett leveransbageri?
- Egen tillverkning
- Köper in från leveransbageri
- Både och
- Annat (specifiserar gärna)

Hur många anställda har ert företag?
- 1-5
- 6-10
- >10

Vilken region har ni verksamhet i?
- Stockholm, Göteborg, Malmö
- Uppsala, Västerås, Örebro, Linköping, Helsingborg
- Övriga Sverige

Frågor om allergen-fria produkter

* Har ni märkt av en ökad efterfråga av allergivänliga produkter på ert bageri/konditori? T.ex. Glutenfritt, laktosfritt etc.
- Ja
- Nej
Erbjuder ni allergivänliga produkter?

○ Ja
○ Nej

Definition av allergivänliga produkter

Allergivänliga matprodukter är mat som osannolikt orsakar allergiska reaktioner. Det inkluderar produkter som är fria från:

- Gluten
- Vete
- Mejeri
- Lakotos
- Ågg
- Nötter
- Soja

Varldens befolkning består av miljoner människor som lider av någon form av matallergi eller intolerans, vilket har resulterat i en ökad efterfråga av allergivänliga produkter bland konsumenter.
Frågor om ert allergen-fria sortiment

* Vilka produkter inom området erbjuder ni? (Flertalet svarsalternativ möjliga)
  - Glutenfria
  - Laktsfria
  - Nutfria
  - Sojafria
  - Annat (Specifiserad gärna)

Har ni allergivänliga produkter i ert standardsortiment eller som beställningsvara?
  - Standardsortiment
  - Beställningsvara
  - Båda och
  - Annat (Specifiserad gärna)

Vilken är anledningen till att ni erbjuder allergivänliga produkter? (Flertalet svarsalternativ möjliga)
  - Efterfrågan från kunder med intolerans mot t.ex. Gluten, laktos etc.
  - Efterfrågan från hälsomotiverande kunder
  - Ökad försäljning
  - Ger en större marknadsföring/konkurrensfördel
  - Annat (Specifiserad gärna)

Hur marknadsför ni ert allergivänliga erbjudande? (Flertalet svarsalternativ möjliga)
  - Sociala medier
  - Reklamutstick
  - Tidningsannonser
  - Egen hemsida
  - I konditorie/ubageriet
  - Annat (Specifiserad gärna)

Marknadsförs dessa produkter enskilt från andra?
  - Ja
  - Nej
Vad anser ni är viktigast i försäljningen av allergivänliga produkter?

- Smak
- Hälsa
- Nöjda kunder
- Annet (Specificera gåta)

Hur presenterar ni era allergivänliga produkter i bageriet/konditoriet? (Flera svarsalternativ möjliga)

- I en separat sektion
- Ingen särskild placering
- Annet (Specificera gåta)

Tar ni högre priser för era allergivänliga produkter?

- Ja
- Nej

Vad beror den högre prissättningen på? (Flera svarsalternativ möjliga)

- Ökad råvarukostnad
- Ökad personalkostnad
- Högre svinnfaktor
- Annet (Specificera gåta)
Vilka effekter upplevde ni efter att ert företag introducerat allergivänliga produkter? (Flerta
varsalternativ möjliga)

☐ Ökat antal kunder
☐ Minskat antal kunder
☐ Ökad försäljning
☐ Minskad försäljning
☐ Annat (Specifisera gärna)

Hur stor andel av er försäljning kommer från allergivänliga produkter?

☐ 0-10%
☐ 10-20%
☐ >20%

Hur hög konkurrens upplever ni i denna marknad?

<table>
<thead>
<tr>
<th>Väljligt låg</th>
<th>Låg</th>
<th>Normal</th>
<th>Hög</th>
<th>Väldigt hög</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upplevd konkurrens</td>
<td>☐</td>
<td>☀</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

* Från vilka? (Flerta varsalternativ möjliga)

☐ Andra lokala bagerier/konditorier
☐ Matbutikers egen bageri
☐ Annat (Specifisera gärna)
Frågor om allergen-fria produkter

Vad är anledningen till att ni inte erbjuder allergivänliga produkter? (Flera svarsalternativ möjliga)

☐ Ingen efterfrågan
☐ Dålig församling
☐ För hög konkurrens
☐ Vi har inte möjlighet att tillverka allergivänliga produkter i vårt bageri/konditori
☐ Anmäl (Specifiser gamla)

Vad skulle få er att introducera allergivänliga produkter till ert sortiment? (Flera svarsalternativ möjliga)

☐ Etterfrågan från kunder med intolerans mot t.ex. Gluten, laktos etc.
☐ Etterfrågan från hälsomotiverande kunder
☐ Ökad försäljning
☐ Kan ge en större marknadsfördel/konkurrensfördel
☐ Anmäl (Specifiser gamla)

Skulle du ta högre priser för allergivänliga produkter?

☐ Ja
☐ Nej
Vänligen ange din mejl-adress här om du är intresserad av undersökningsresultat.

Tack så mycket för att ni deltog i den här enkäten! Katharina & Johanna
Appendix 2

Q1 Har ni egen tillverkning eller köper ni från ett leveransbageri?

Svarade: 37  Hoppade över: 1

- **Egen tillverkning**: 89,19% (33 svar)
- **Köper in från leveransbageri**: 2,75% (1 svar)
- **Både och**: 8,11% (3 svar)
- **Annat (Specificera...)**: 0,09% (0 svar)

<table>
<thead>
<tr>
<th>Svarval</th>
<th>Svar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Egen tillverkning</td>
<td>89,19%</td>
</tr>
<tr>
<td>Köper in från leveransbageri</td>
<td>2,75%</td>
</tr>
<tr>
<td>Både och</td>
<td>8,11%</td>
</tr>
<tr>
<td>Annat (Specificera gärna)</td>
<td>0,09%</td>
</tr>
<tr>
<td>Totalt</td>
<td>100%</td>
</tr>
</tbody>
</table>

Det finns inga svar.
Q2 Hur många anställda har ert företag?

Svarade: 35  Hoppade över: 3

<table>
<thead>
<tr>
<th>Svarsval</th>
<th>Svar</th>
</tr>
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<tbody>
<tr>
<td>1-5</td>
<td>20,57%</td>
</tr>
<tr>
<td>5-10</td>
<td>20,00%</td>
</tr>
<tr>
<td>&gt;10</td>
<td>51,43%</td>
</tr>
<tr>
<td>Totalt</td>
<td>35</td>
</tr>
</tbody>
</table>
Q3 Vilken region har ni verksamhet i?

<table>
<thead>
<tr>
<th>Svarsvärd</th>
<th>Svar</th>
</tr>
</thead>
</table>
| Stockholm, Göteborg, Malmö            | 28,73% | 11  
| Uppsala, Västerås, Örebro, Linköping, Helsingborg | 10,11% | 4   
| Övriga Sverige                         | 59,46% | 22  
| Total                                 | 100% | 37  

Svarade: 37  Hoppade över: 1
Q4 Har ni märkt av en ökad efterfråga av allergivänliga produkter på ert bageri/konditori? T.ex. Glutenfritt, laktosfritt etc.

Svarade: 38  Hoppade över: 0

<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>Ja</td>
<td>33</td>
</tr>
<tr>
<td>Nej</td>
<td>5</td>
</tr>
<tr>
<td>En aning</td>
<td>0</td>
</tr>
<tr>
<td>Totalt</td>
<td>38</td>
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</tbody>
</table>
Q5 Erbjuder ni allergivänliga produkter?

Svarade: 37   Hoppade över: 1

<table>
<thead>
<tr>
<th>Svarsval</th>
<th>Svar</th>
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<tbody>
<tr>
<td>Ja</td>
<td>86,49%</td>
</tr>
<tr>
<td>Nej</td>
<td>13,51%</td>
</tr>
<tr>
<td>Totalt</td>
<td>37</td>
</tr>
</tbody>
</table>
Q6 Vilka produkter inom området erbjuder ni? (Flera svarsalternativ möjliga)

Svarade: 27  Hoppade över: 11

<table>
<thead>
<tr>
<th>Svarsval</th>
<th>Svar</th>
</tr>
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<tbody>
<tr>
<td>Glutenfria</td>
<td>66,67%</td>
</tr>
<tr>
<td>Laktosfria</td>
<td>96,50%</td>
</tr>
<tr>
<td>Nötfría</td>
<td>70,37%</td>
</tr>
<tr>
<td>Sojafría</td>
<td>44,44%</td>
</tr>
<tr>
<td>Anmat (Specificera)</td>
<td>37,04%</td>
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</tbody>
</table>

Totalt antal svarande: 27

<table>
<thead>
<tr>
<th>#</th>
<th>Anmat (Specificera gärna)</th>
<th>Datum</th>
</tr>
</thead>
<tbody>
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<td>1</td>
<td>Ägg, snör</td>
<td>2015-05-06 14:31</td>
</tr>
<tr>
<td>2</td>
<td>Naturligt fett från gluten</td>
<td>2015-05-06 22:07</td>
</tr>
<tr>
<td>3</td>
<td>Äggfri</td>
<td>2015-05-05 13:11</td>
</tr>
<tr>
<td>4</td>
<td>mjölkfri, äggfri samt sockerfri (även om det ej är en allergi)</td>
<td>2015-05-05 12:10</td>
</tr>
<tr>
<td>5</td>
<td>Laktosfrá produkter sålda i Finland</td>
<td>2015-05-05 09:31</td>
</tr>
<tr>
<td>6</td>
<td>Fris från, inkl spår, av alla allergener i listan i förordning 1169/2011 Bilega 2 utom gluten</td>
<td>2015-05-05 06:47</td>
</tr>
<tr>
<td>7</td>
<td>Gelatinfría, sockerfría med mera</td>
<td>2015-05-05 07:19</td>
</tr>
<tr>
<td>8</td>
<td>Sockerfri</td>
<td>2015-04-04 10:30</td>
</tr>
<tr>
<td>9</td>
<td>Ägg, mjölkprotein</td>
<td>2015-04-27 11:49</td>
</tr>
<tr>
<td>10</td>
<td>Gelatinfría, äggfri, m.m.</td>
<td>2015-04-20 10:04</td>
</tr>
</tbody>
</table>
Q7 Har ni allergivänliga produkter i ert standardsortiment eller som beställningsvara?

Svarade: 27   Hoppade över: 11

<table>
<thead>
<tr>
<th>Svarsval</th>
<th>Svar</th>
<th>Svarförde</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standardsortiment</td>
<td>51,85%</td>
<td>14</td>
</tr>
<tr>
<td>Beställningsvara</td>
<td>0,00%</td>
<td>0</td>
</tr>
<tr>
<td>Både och</td>
<td>44,44%</td>
<td>12</td>
</tr>
<tr>
<td>Annat (Specifiserare gärna)</td>
<td>3,70%</td>
<td>1</td>
</tr>
<tr>
<td>Totalt</td>
<td></td>
<td>27</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>#</th>
<th>Anmat (Specifiker gärna)</th>
<th>Datum</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Som ett komplement för det matet</td>
<td>2015-04-26 20:43</td>
</tr>
</tbody>
</table>
**Q8 Vilken är anledningen till att ni erbjuder allergivänliga produkter? (Flera svarsalternativ möjliga)**

- **Svarade:** 27  
- **Hoppade över:** 11

### Diagram

- **Efterfrågan från kunder:** 85,19%  
- **Efterfrågan från:** 7,41%  
- **Ökad försäljning:** 25,83%  
- **Ger en större marknadsföråld:** 59,26%  
- **Annan (Specifiserar gärna):** 11,11%

### Svarsval

<table>
<thead>
<tr>
<th>Svarsval</th>
<th>Svar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Efterfrågan från kunder med intolerans mot t.ex. Gluten, laktos etc.</td>
<td>85,19% 23</td>
</tr>
<tr>
<td>Efterfrågan från hälsosmotiverande kunder</td>
<td>7,41% 2</td>
</tr>
<tr>
<td>Ökad försäljning</td>
<td>25,83% 7</td>
</tr>
<tr>
<td>Ger en större marknadsföråld/konkurrensfördele</td>
<td>59,26% 18</td>
</tr>
<tr>
<td>Annan (Specifiserar gärna)</td>
<td>11,11% 3</td>
</tr>
</tbody>
</table>

**Totalt antal svarande:** 27

### Tabell

<table>
<thead>
<tr>
<th>#</th>
<th>Annan (Specifiserar gärna)</th>
<th>Datum</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Specifika kunders efterfrågan tyd kommuner</td>
<td>2015-05-08 14:31</td>
</tr>
<tr>
<td>2</td>
<td>år kommunleverantör</td>
<td>2015-05-08 10:49</td>
</tr>
<tr>
<td>3</td>
<td>vi har dessa produkter ofvstånd förfrågar får inte sälja som glutenfritt då vi bakar med vanligt mjölk i lokalen</td>
<td>2015-04-20 05:25</td>
</tr>
</tbody>
</table>
Q9 Hur marknadsför ni ert allergivänliga erbjudande? (Flera svarsalternativ möjliga)

Svarade: 26   Hoppade över: 12

<table>
<thead>
<tr>
<th>Svarsväl</th>
<th>Svar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sociala medier</td>
<td>50,00%</td>
</tr>
<tr>
<td>Reklamutskick</td>
<td>3,85%</td>
</tr>
<tr>
<td>Tidningsannonser</td>
<td>7,69%</td>
</tr>
<tr>
<td>Egen hemsida</td>
<td>61,54%</td>
</tr>
<tr>
<td>I konditori/bageriet</td>
<td>57,09%</td>
</tr>
<tr>
<td>Annat (Specificera gärna)</td>
<td>34,62%</td>
</tr>
</tbody>
</table>

Totalt antal svarande: 26

# | Annat (Specificera gärna) | Datum |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I butik</td>
<td>2015-05-08 14:31</td>
</tr>
<tr>
<td>2</td>
<td>Facebook</td>
<td>2015-05-09 21:58</td>
</tr>
<tr>
<td>3</td>
<td>Inget, det bara finns och sprids bland kunder!</td>
<td>2015-05-06 16:47</td>
</tr>
<tr>
<td>4</td>
<td>Samarbete med Astina &amp; Allergiföreningen</td>
<td>2015-05-05 12:10</td>
</tr>
<tr>
<td>5</td>
<td>Det enda vi lyfter fram är Mjölkfrö på förpackningarna (upptäcker sännär hos SLV)</td>
<td>2015-05-05 08:47</td>
</tr>
<tr>
<td>6</td>
<td>I butik och servering</td>
<td>2015-05-05 07:16</td>
</tr>
<tr>
<td>7</td>
<td>Demo i butik</td>
<td>2015-04-27 11:48</td>
</tr>
<tr>
<td>8</td>
<td>Inte alls!</td>
<td>2015-04-24 06:28</td>
</tr>
<tr>
<td>9</td>
<td>Skyttmaterial i butik</td>
<td>2015-04-20 10:04</td>
</tr>
</tbody>
</table>
Q10 Marknadsförings dessa produkter enskilt från andra?

Svarade: 24  Hoppade över: 14

<table>
<thead>
<tr>
<th>Svarsval</th>
<th>Svar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ja</td>
<td>12,50%</td>
</tr>
<tr>
<td>Nej</td>
<td>87,50%</td>
</tr>
<tr>
<td>Totalt</td>
<td>24</td>
</tr>
</tbody>
</table>
Q11 Vad anser ni är viktigast i försäljningen av allergivänliga produkter?

Svarade: 26   Hoppade över: 12

- Smak
- Hälsa
- Nöjda kunder
- Annat (Specificera...)

<table>
<thead>
<tr>
<th>Svarsmål</th>
<th>Svar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smak</td>
<td>15,38%</td>
</tr>
<tr>
<td>Hälsa</td>
<td>3,85%</td>
</tr>
<tr>
<td>Nöjda kunder</td>
<td>76,92%</td>
</tr>
<tr>
<td>Annat (Specificera gärna)</td>
<td>3,85%</td>
</tr>
<tr>
<td>Totalt</td>
<td>100%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>#</th>
<th>Annat (Specificera gärna)</th>
<th>Datum</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>smak utseende fräscha balverk</td>
<td>2015-04-29 06:08</td>
</tr>
</tbody>
</table>
### Q12 Hur presenterar ni era allergivänliga produkter i bagarjet/konditori? (Flera svarsalternativ möjliga)

Svarade: 26  Hoppade över: 12

![Bar chart showing responses]

<table>
<thead>
<tr>
<th>Svarsväl</th>
<th>Svar</th>
</tr>
</thead>
<tbody>
<tr>
<td>i en separat sektion</td>
<td>19.23%</td>
</tr>
<tr>
<td>Ingen särskild placering</td>
<td>69.25%</td>
</tr>
<tr>
<td>Annat (Specifiser...</td>
<td>15.52%</td>
</tr>
</tbody>
</table>

Totalt antal svarande: 26

<table>
<thead>
<tr>
<th>#</th>
<th>Annat (Specifiser...</th>
<th>Datum</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Vi säljer produkterna i livsmedelsbutiker eller via grossist. Presentation sker via förpackning, skilt eller annan produktinformation som t ex produktblad</td>
<td>2015-05-06 08:47</td>
</tr>
<tr>
<td>2</td>
<td>Finns bara O, M, Å och N produkter</td>
<td>2015-04-27 11:48</td>
</tr>
<tr>
<td>3</td>
<td>Vid förfrågan</td>
<td>2015-04-20 12:38</td>
</tr>
<tr>
<td>4</td>
<td>I fabriken handskas vi ej med nötter, jordnötter, mjölkprodukter eller sojabaserade produkter därför ingen särskild placering</td>
<td>2015-04-20 09:42</td>
</tr>
</tbody>
</table>
Q13 Tar ni högre priser för era allergivänliga produkter?

Svarade: 27  Hoppade över: 11

<table>
<thead>
<tr>
<th>Svarsval</th>
<th>Svar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ja</td>
<td>40,74%</td>
</tr>
<tr>
<td>Nej</td>
<td>59,26%</td>
</tr>
<tr>
<td>Totalt</td>
<td></td>
</tr>
</tbody>
</table>
Q14 Vad beror den högre prissättningen på? (Flera svarsalternativ möjliga)

Svarade: 16   Hoppade över: 22

<table>
<thead>
<tr>
<th>Svarsväl</th>
<th>Svar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ökad råvarukostnad</td>
<td>61,25%</td>
</tr>
<tr>
<td>Ökad personalkostnad</td>
<td>31,25%</td>
</tr>
<tr>
<td>Högre svinifiktor</td>
<td>18,75%</td>
</tr>
<tr>
<td>Annat (Specificka gärna)</td>
<td>25,00%</td>
</tr>
</tbody>
</table>

Totalt antal svarande: 16

<table>
<thead>
<tr>
<th>#</th>
<th>Annat (Specificka gärna)</th>
<th>Datum</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Vi heller i största möjliga mån samma pris. Ex. glutenlockelett LCHF-kaka var vi tvungna att höja priset på med 5 kr med tanka på att ingredienserna är dyrare.</td>
<td>2015-05-05 12:10</td>
</tr>
<tr>
<td>2</td>
<td>Ingen högre kostnad, den är likvärdig med andra produkter av samma råvaror</td>
<td>2015-05-05 07:18</td>
</tr>
<tr>
<td>3</td>
<td>Särskilt hantering inköp</td>
<td>2015-04-20 20:43</td>
</tr>
<tr>
<td>4</td>
<td>Ingen prishökning</td>
<td>2015-04-20 09:42</td>
</tr>
</tbody>
</table>
Q15 Vilka effekter upplevde ni efter att ert företag introducerat allergivänliga produkter? (Flera svarsalternativ möjliga)

Svarade: 23  Hoppade över: 15

<table>
<thead>
<tr>
<th>Svarsval</th>
<th>Svar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ökat antal kunder</td>
<td>39,13% 9</td>
</tr>
<tr>
<td>Minskant antal kunder</td>
<td>0,09% 0</td>
</tr>
<tr>
<td>Ökad försäljning</td>
<td>34,78% 8</td>
</tr>
<tr>
<td>Minskad försäljning</td>
<td>0,00% 0</td>
</tr>
<tr>
<td>Annat (Specifiseras gärna)</td>
<td>47,83% 11</td>
</tr>
</tbody>
</table>

Totalt antal svarande: 23

<table>
<thead>
<tr>
<th>#</th>
<th>Annat (Specifiseras gärna)</th>
<th>Datum</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ingen skillnad</td>
<td>2015-05-07 08:27</td>
</tr>
<tr>
<td>2</td>
<td>vi har alltid arbetat med dessa typer av produkter</td>
<td>2015-05-06 22:07</td>
</tr>
<tr>
<td>3</td>
<td>vet ej</td>
<td>2015-05-06 16:47</td>
</tr>
<tr>
<td>4</td>
<td>nödvändigt</td>
<td>2015-05-08 10:49</td>
</tr>
<tr>
<td>5</td>
<td>vi har haft detta erhållande i över 30 år</td>
<td>2015-05-08 08:47</td>
</tr>
<tr>
<td>6</td>
<td>väldigt glada kunder som uppskattar det</td>
<td>2015-05-04 16:43</td>
</tr>
<tr>
<td>8</td>
<td>närmaste kunder (totalt sett lå)</td>
<td>2015-04-26 20:43</td>
</tr>
<tr>
<td>9</td>
<td>närmaste kunder</td>
<td>2015-04-24 06:28</td>
</tr>
<tr>
<td>10</td>
<td>närmaste kunder, kunder sköter gär och flera ställen</td>
<td>2015-04-20 10:04</td>
</tr>
<tr>
<td>11</td>
<td>vi har alltid haft detta</td>
<td>2015-04-20 09:41</td>
</tr>
</tbody>
</table>
Q16 Hur stor andel av er försäljning kommer från allergivänliga produkter?

Svarade: 27  Hoppade över: 11

<table>
<thead>
<tr>
<th>Svarsval</th>
<th>Svar</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-10%</td>
<td>55,56%</td>
</tr>
<tr>
<td>10-20%</td>
<td>7,41%</td>
</tr>
<tr>
<td>&gt;20%</td>
<td>37,64%</td>
</tr>
<tr>
<td>Totalt</td>
<td></td>
</tr>
</tbody>
</table>

Diagrammet visar fördelningen av svar.
**Q17 Hur hög konkurrens upplever ni i denna marknad?**

Svarade: 26   Hoppade över: 12

<table>
<thead>
<tr>
<th>Upplevd konkurrens</th>
<th>Väldigt låg</th>
<th>Låg</th>
<th>Normal</th>
<th>Hög</th>
<th>Väldigt hög</th>
<th>Totalt</th>
<th>Viktat genomsnitt</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>2</td>
<td>14</td>
<td>7</td>
<td>3</td>
<td>0</td>
<td>28</td>
<td>2,42</td>
</tr>
</tbody>
</table>


Q18 Från vilka? (Flera svarsalternativ möjliga)

Svarade: 26   Hoppade över: 12

<table>
<thead>
<tr>
<th>Eftersatt</th>
<th>Svar</th>
<th>Antal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Andra lokala bageri/konditori</td>
<td>50,00%</td>
<td>13</td>
</tr>
<tr>
<td>Matbutikens egna bageri</td>
<td>38,46%</td>
<td>10</td>
</tr>
<tr>
<td>Större bagerkedjor</td>
<td>0,00%</td>
<td>0</td>
</tr>
<tr>
<td>Annat (Specifika gärna)</td>
<td>34,62%</td>
<td>9</td>
</tr>
</tbody>
</table>

Totalt antal svarade: 26

<table>
<thead>
<tr>
<th>#</th>
<th>Annat (Specifika gärna)</th>
<th>Datum</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>känner ingen konkurrens</td>
<td>2015-05-06 16:47</td>
</tr>
<tr>
<td>2</td>
<td>Andra livsmedelsproducenter</td>
<td>2015-05-05 09:31</td>
</tr>
<tr>
<td>3</td>
<td>Andra industribagerier</td>
<td>2015-05-05 08:47</td>
</tr>
<tr>
<td>4</td>
<td>Special bagerier. Våra varor är dock komplement i vårt standard sortiment och ingen konkurrenstrategi</td>
<td>2015-05-04 16:43</td>
</tr>
<tr>
<td>5</td>
<td>Vet ej</td>
<td>2015-05-04 16:30</td>
</tr>
<tr>
<td>6</td>
<td>Finns inget mer i dettaområde</td>
<td>2015-04-27 11:48</td>
</tr>
<tr>
<td>7</td>
<td>vet inte vad andra gör, och bryr mig inte så mycket om det heller, antagligen &quot;till&quot; svar för en företagare...</td>
<td>2015-04-24 06:28</td>
</tr>
<tr>
<td>8</td>
<td>Specialbagerier</td>
<td>2015-04-20 12:38</td>
</tr>
<tr>
<td>9</td>
<td>Större industribagerier</td>
<td>2015-04-20 09:42</td>
</tr>
</tbody>
</table>
**Q19 Vad är anledningen till att ni inte erbjuder allergivänliga produkter? (Flera svarsalternativ möjliga)**

Svarade: 4  Hoppade över: 34

<table>
<thead>
<tr>
<th>Svarsval</th>
<th>Svar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ingen efterfrågan</td>
<td>25,00%</td>
</tr>
<tr>
<td>Dålig lönsamhet</td>
<td>0,00%</td>
</tr>
<tr>
<td>För hög konkurrens</td>
<td>0,00%</td>
</tr>
<tr>
<td>Vi har inte möjlighet att...</td>
<td>75,00%</td>
</tr>
<tr>
<td>Annat (Specificera...)</td>
<td>0,00%</td>
</tr>
</tbody>
</table>

Totalt antal svarande: 4

<table>
<thead>
<tr>
<th>#</th>
<th>Annat (Specificera gärna)</th>
<th>Datum</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Det finns inga svar.</td>
<td></td>
</tr>
</tbody>
</table>
Q20 Vad skulle få er att introducera allergivänliga produkter till ert sortiment? (Flera svarsalternativ möjliga)

Svarade: 3   Hoppade över: 35

<table>
<thead>
<tr>
<th>Svarsval</th>
<th>Svar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Efterfrågan från kunder...</td>
<td>33,33%</td>
</tr>
<tr>
<td>Efterfrågan från...</td>
<td>0,00%</td>
</tr>
<tr>
<td>Ökad försäljning</td>
<td>0,00%</td>
</tr>
<tr>
<td>Kan ge en större...</td>
<td>33,33%</td>
</tr>
<tr>
<td>Annet (Specificera...</td>
<td>33,33%</td>
</tr>
</tbody>
</table>

Totalt antal svarande: 3

<table>
<thead>
<tr>
<th>#</th>
<th>Annet (Specificera gärna)</th>
<th>Datum</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Ej möjlighet</td>
<td>2015-04-20 13:56</td>
</tr>
</tbody>
</table>
Q21 Skulle du ta högre priser för allergivänliga produkter?

Svarade: 4   Hoppade över: 34

<table>
<thead>
<tr>
<th>Svarval</th>
<th>Svar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ja</td>
<td>75,00%</td>
</tr>
<tr>
<td>Nej</td>
<td>25,00%</td>
</tr>
<tr>
<td>Total</td>
<td></td>
</tr>
</tbody>
</table>

Diagram: Bar chart showing the responses to the question. Yes (Ja) is significantly higher than No (Nej).
Q22 Vänligen ange din mejl-adress här om du är intresserad av undersökningsresultat.

<table>
<thead>
<tr>
<th>#</th>
<th>Svar</th>
<th>Datum</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><a href="mailto:v.averkus@hotmail.com">v.averkus@hotmail.com</a></td>
<td>2015-05-06 22:07</td>
</tr>
<tr>
<td>2</td>
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