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The Grocer Guide to...

The Grocer

Bread & baked goods



Analysis



As consumers seek out items with simple ingredients and healthier profiles, sourdough is really coming into its own. However, 'familiar with a twist' is still a driving force in bakery selection

Sourdough's time to bloom

After that headline, many would argue that sourdough has been blooming for some considerable time and is not a nouveau-né on the bread and bakery scene. And yes, they would be correct in that assertion.

However, as a recent article[1] in the Grocer's sister magazine, British Baker, points out: "Sourdough's rise from artisanal favourite to supermarket staple is complete." In other words, sourdough has officially moved into the mainstream and, in doing so, has "become the benchmark against which consumers judge the quality of an entire bakery range".

What's more the stats bear this out. As a social post by the Federation of Bakers[2] highlights, sourdough has more than doubled in value and volume over the last five years, with spend rising from £44.1m in 2021 to £114.3m in 2025, and packs increasing from 22.3m to 51.8m over the same period.

All of this is hardly a surprise, when you consider that sourdough fits perfectly into the modern zeitgeist of consumers' increasing search for simple and less processed ingredients, clear provenance, quality, and products that simply taste good. And the exciting factor for bakery suppliers is that there is plenty more development for that sector of the market to come.

As Jason Geary, master baker at Geary's Bakeries, confirms: "In the bread category, shoppers are looking for products that deliver on quality, taste and convenience, while becoming increasingly aware of what goes into their food. Sourdough has benefited from this shift, playing an increasingly important role in the wider bread market and helping to offset the decline in pre-packed sales, he notes. "Overall, speciality bread sales have grown by £123m year on year, a 51% increase in value, and 47% growth in units[3]," he reports. "By comparison, standard pre-packed bread sales have fallen by £93m, down 5.3% in value and 6.4% in units[4]."

The bread market is increasingly being shaped by shoppers buying more selectively and trading up where they see genuine value, maintains Leann Baines, category manager at Finsbury Food Group. "While traditional sliced bread remains an important staple, there is growing momentum behind products that offer something more, whether through taste, quality, indulgence or nutritional benefits."

Shoppers are making more informed food choices, weighing up taste, quality, ingredients and nutritional value, says Hannah Sibley, product and innovation



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director at Aryzta UK & Ireland. "As sourdough specialists, we've seen this translate into growing demand for breads that combine simple ingredients with distinctive flavour and a more premium eating experience," she adds.

Despite ongoing financial pressure, bakery is performing strongly in key areas, notes Melanie Charles, customer category manager at Lantmännen Unibake UK. "The sweet bakery sector as a whole has experienced value growth of 5.3%, with French pastries a key driver, up 5.1%[5]," she says. "Consumers are increasingly selective about what earns a place on their plates and are looking for bakery products that deliver tangible value – whether that is nutritional (through protein, fibre and nutrient density), support for gut health, or emotional value through taste, quality and enjoyment."

Bakery remains a much-loved and important part of people's everyday diets, but the category is evolving at pace and this isn't going to slow, says Colin Bebbington, commercial director at Warburtons. "Growth opportunities are increasingly coming from products that give people a reason to move beyond traditional 'staple' purchases, whether through better nutrition, superior quality, or more versatile formats that can play across more occasions. Premiumisation is an important part of this, but it needs to be accessible, particularly given sustained cost of living pressures."

Premiumisation remains an important opportunity, particularly as consumers continue to look for affordable ways to elevate everyday meals at home, agrees Josh Corrigan, head of UK sales at St Pierre Groupe. "Bakery is well placed to benefit because relatively small upgrades, such as trading up from a standard bun to a brioche, can transform the overall eating experience without significantly increasing spend."

Healthy nutrition

Health and nutritional value are important influences on bakery development, alongside taste, freshness and quality, says Simon Atkins, bakery advisor to the EU's 'More Than Only Food and Drink' campaign. "Using wholegrain flour, seeds, rye, oats and other grains can help bakers develop the nutritional profile of their products while enhancing flavour and texture. Established EU baking traditions provide concrete examples. While wholemeal bread in the UK tends to centre on wheat, Germany's wholemeal

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rye breads, Denmark's rugbrød and the seeded rye breads common across northern EU countries offer a wider variety of grains, textures and flavours."

While health is undoubtedly one of the most important influences shaping bakery, the definition of 'healthy' is becoming much more individualised, notes Lantmännen Unibake's Charles. "The conversation is moving away from simply eating fewer calories towards what food can positively add to the diet," she says.

At Finsbury Food Group, development process manager Paul Bown agrees that while healthy is undoubtedly "one of the biggest drivers of innovation in bread and bakery", it means different things to different consumers. "We're seeing strong interest in both high-protein and high-fibre products, with benefits that were once confined to specialist ranges becoming increasingly mainstream," he says. "That is influencing ingredient choices, with greater interest in wholegrains, rye, seeds and grain-based blends that deliver recognisable nutritional benefits."

Health is undoubtedly reshaping bakery, but the fundamentals of taste, freshness and value are ever-present and relevant, says Warburtons' Bebbington. "What's changed more profoundly is what consumers mean by 'healthy'; rather than simply looking for products that are low in fat or offer fewer calories, shoppers are increasingly looking for products which offer them positive nutrition such as fibre, wholegrains, protein or gut health."

"Health and nutrition have certainly grown as important influences on consumer choices, although taste, price and convenience remain fundamental to purchase decisions," concurs Geary from Geary's Bakeries. "Consumers are becoming more aware of the nutritional value of everyday foods, rather than simply looking for products marketed as healthy. Research highlights that the extent to which a product is processed is the number one concern for pre-packaged bread shoppers, ranking third overall across all food categories[6]. Fibre content and the presence of wholegrains are also more important to bread shoppers than the average consumer, while sugar content ranks higher as a concern. This reflects a growing interest in simple ingredients and nutritional value, which is something sourdough is well placed to address."

While St Pierre Groupe's Corrigan acknowledges the importance of considerations such as health and nutritional value within bakery, they are not replacing the fundamental drivers of taste, quality and convenience. "Instead, consumers are looking for greater balance, choosing products that can fit into a healthy, varied diet while still delivering enjoyment," he notes.

Meanwhile, as interest in protein, fibre and other nutritional benefits grows, it is important not to reduce the conversation to whether an individual bakery product is perceived as healthy or unhealthy, he adds. "The nutritional contribution of the bread carrier matters, but so does what consumers put on it or in it." Fillings, toppings and accompaniments to a sandwich made with bread or a brioche can significantly change its nutritional profile.

> **"The protein trend has helped kick-start a wider move towards products that offer positive nutrition, and fibre is now the emerging focus"**

Fibre on the rise

"The protein trend has helped kick-start a wider move towards products that offer positive nutrition, and fibre is now the emerging focus," says Warburtons' Bebbington. "The government recommends adults eat 30g of fibre a day, and while there's a gap in how much we're eating, there's clearly more conversation about why it matters. Our own YouGov research found 44% of UK adults didn't know how much fibre they should eat, and 43% weren't confident they eat enough[7]. Given the UK's fibre



Sourdough and beyond

Sourdough has been a success story, gravitating into an 'everyday' loaf, and continues to resonate strongly with shoppers, says Lantmännen Unibake's Charles. "We have seen a 23.4% rise in sourdough value sales compared with 2025[i], demonstrating the growing appetite for speciality breads that carry a perceived 'health halo'," she says. "There is also an opportunity for more nutrient-dense Scandinavian and rye-inspired breads to follow a similar trajectory to sourdough, evolving from relatively specialist products into formats with much broader mainstream consumer appeal."

"Sourdough, which we produce at our artisan bakery Nicholas & Harris, has been a particular standout," says Kenny Martin, senior category manager at Finsbury Food Group. "The category has grown by 54% in value year-on-year[ii], demonstrating genuine consumer demand rather than simply inflation-driven value growth. Particularly encouraging is the headroom that remains. Around 25% of households currently buy sourdough or pre-packed artisan bread[iii], so there is significant opportunity to recruit new shoppers and encourage more frequent purchases."

Finsbury also points to innovation moving beyond traditional white sourdough into seeded, rye and savoury variants.

"With busy everyday lives, shoppers are looking for foods that offer ease and convenience," says Aryzta's Sibley. "Sourdough is a popular choice because it naturally contains more nutrients that are easier to digest."

"Indulgence and nutrition increasingly sit alongside one another in bakery, although consumers' expectations vary by occasion," says the EU campaign's Atkins. "An everyday loaf and an occasional pastry serve different purposes, but both can benefit from good ingredients, skilled production and clear information about how they are made.

"Sourdough's expansion into sweet bakery, including brioche and pastries, illustrates how traditional techniques can find new applications. It allows bakers to introduce flavour and fermentation into familiar, indulgent formats, drawing on the breadth of EU baking expertise."

deficit there is a real opportunity for bakery to be part of the solution, and grow as a result."

Protein has had a lot of attention, but fibre is becoming a part of the conversation, as consumers become more aware of its role in a balanced diet, agrees Geary from Geary's Bakeries. "UK supermarket sales of fibre-based foods grew by 14.1% over the 26 weeks at the start of the year, compared with 9.6% for protein-based foods[8]," he reveals. "This suggests that fibre is gaining momentum alongside protein, as consumers look for ways to improve their everyday diets. We expect interest in fibre-rich foods to continue growing, encouraging greater consideration of wholegrains, seeds and other ingredients that can contribute to nutritional value."

Protein and fibre are key nutrients that consumers are seeking, with lots more emphasis on fibre for the year ahead, says Aryzta's Sibley. "We expect to see growing demand for wholemeal and wholegrain breads as a result. Naturally rich in fibre and offering a range of vitamins and minerals, these products provide an accessible way for consumers to boost their nutritional intake through everyday food choices.

"We also expect to see greater emphasis on fibre-rich baked goods next year, with wholemeal and seeded flours playing a key role in boosting fibre content."

Bakery with more bite

Bread is becoming a flavour destination in its own right, with shoppers exploring influences from Mediterranean, Middle Eastern and Asian cuisines, says Aryzta's Sibley. "Social media is helping drive discovery, with ingredients such as olives, sundried tomatoes, and miso offering opportunities to bring new flavours to familiar formats. Seasonal trends will also drive demand, with bolder combinations and flavours such as pumpkin and aromatic spices gaining traction in autumn."

However, unusual combinations can feel overly complicated or processed if consumers cannot readily understand what has gone into them, points out the EU campaign's Atkins. "A more compelling approach is to give people a clear connection to the ingredients, their provenance and the processes used to make the product. Familiar, recognisable ingredients can introduce considerable variety in flavour and texture. Spices, herbs, sprouted grains, seeds and pastes can all bring a new dimension to an established format. Rosemary and olive oil swirled through dough, for example, add warmth, colour and aromatic complexity, while seeds can provide a contrasting crunch, and sprouted grains bring interest to both flavour and bite. The innovation comes from how these ingredients are combined and handled, with each

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contributing something meaningful to the finished product.

"Meanwhile, the enthusiasm for high-quality laminated pastry and soft sweet dough also demonstrates how tradition can provide a platform for indulgent innovation," he adds. "Bakers can combine a crisp, flaky exterior or a soft, gently chewy dough with deep, rich fillings such as pistachio paste or chocolate with a high cocoa content. Here, texture is as important as flavour: the contrast between delicate pastry layers and a smooth filling creates a more satisfying and distinctive eating experience."

Texture is becoming an increasingly important part of the bakery experience, says St Pierre's Corrigan. "Combinations such as flaky and creamy, or soft and crisp, can make products feel more indulgent and differentiated, creating new reasons for shoppers to engage with familiar bakery categories," he notes.

According to Geary, familiar flavours influence 41% of Gen Z consumers' food and drink choices, while social media is also a source of inspiration for new flavours[9]. "This suggests innovation doesn't always have to mean reinventing a product; it can be about taking something familiar and giving it a fresh twist," he says.

A growing appetite for 'elevated familiarity' is how Finsbury Food Group's innovation manager Ross Lowrey-Heywood describes the current market. "Consumers still want flavours and formats they recognise, but they're looking for something that makes them feel new again, whether that's an unexpected flavour pairing or a distinctive texture," he says. "Texture is becoming as important as flavour. It's no longer enough for a product to simply taste of something; it needs to deliver that experience. Consumers want crunch, chew, snap and visible inclusions that create different sensory moments in every bite."

Rather than a straight choice between adventurous global flavours and nostalgia, the sweet spot is 'familiar discovery', giving consumers something recognisable but with enough of a twist to make it feel new and worth trying, observes Warburtons' Bebbington. "That could come through flavour, but texture is equally important in bakery. Consumers respond instinctively to sensory cues such as softness, chew, crunch, crust and richness because these communicate freshness, quality and indulgence before you even get to a nutritional claim. The implication for innovation is that novelty needs to remain accessible: recognisable formats and ingredients provide reassurance, while more distinctive flavours, inclusions and contrasting textures create the excitement."

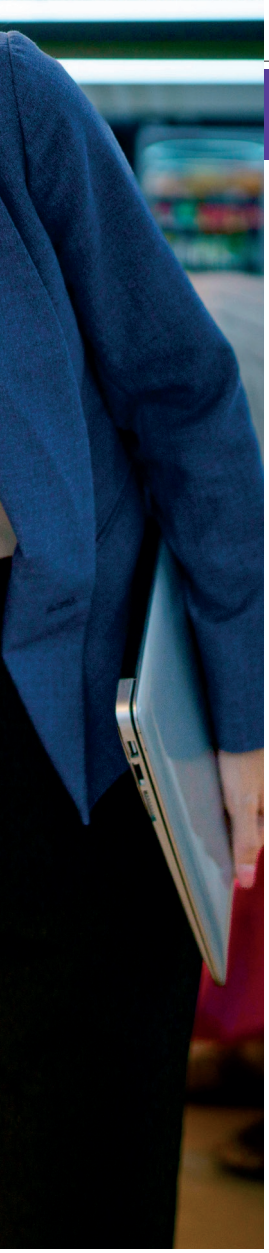


Within sweet bakery, the industry is already asking what comes next after pistachio and matcha, notes Lantmännen Unibake's Charles. "Ube is one ingredient to watch; its subtly nutty, vanilla-like flavour has started crossing into bakery from other categories," she says. "Citrus is also more adventurous now, moving beyond traditional lemon and lime towards yuzu and calamansi, alongside hybrid fruits such as plumcots. However, familiar all-time favourites such as chocolate remain hugely important."

> **"Within sweet bakery, the industry is already asking what comes next after pistachio and matcha. Ube, with its nutty, vanilla-like flavour, is one to watch"**

Inspiring shopper purchase

Retailers need to turn the bakery fixture into a destination, not simply a place to buy bread, urges Lantmännen's Charles – a view echoed by many suppliers. "Bakery has a major advantage over many other grocery categories because it is inherently sensory," she notes. "There is no digital substitute for seeing freshly baked bread, smelling its aroma and assessing its crust, colour, freshness and finish before choosing it."



GLP-1 and the effect on bakery

The potential impact of GLP-1 on grocery is significant, with Kantar estimating that changes in appetite and purchasing behaviour could remove £11bn from future grocery growth[iv], reveals Corrigan at St Pierre. "This reinforces the importance of understanding not just what consumers are buying but the occasions and needs behind those purchases," he says.

GLP-1 is an important influence because it changes the equation from simply 'less food' to 'making every mouthful work harder', says Warburtons' Bebbington. "Smaller appetites and portions increase the relevance of right-sized formats, but consumers using GLP-1 are also placing greater emphasis on nutrient density, particularly protein, fibre, wholegrains and vitamins," he says. "The opportunity is therefore in smaller, satisfying portions that offer strong nutrition and great quality. This neatly aligns with a broader convenience trend too, as bakery steadily adapts to more flexible eating patterns, mini-meals, snacking and on-the-go consumption."

"We're already seeing growth in smaller and more convenient bakery formats, whether that's half loaves or products designed for more flexible eating occasions," agrees Finsbury Food Group's Bown. "Portion control is part of it, but so are reducing waste and making products easier to use in everyday life. GLP-1s and wider changes in eating habits are reinforcing that demand. For manufacturers, the opportunity is to make bakery more convenient without losing the quality and enjoyment shoppers expect."

At Lantmännen Unibake, Charles reveals that 47.8% of French pastry consumers who are GLP-1 users would still eat French pastries[v]. "Taste preferences remain; what may change is frequency, quantity or portion size," she says. "This makes mini and individually portioned formats particularly interesting."

There is also a wider 'say-do gap' to consider, she points out. "Consumers frequently say they want healthier, more functional products, but at the moment of purchase their motivations and behaviour change. What consumers claim they want from health does not necessarily translate into what they actually purchase in practice."

Make the in-store bakery a destination, with an experience that gives shoppers a reason to visit and return, agrees Aryzta's Sibley. "Combine the aroma of freshly baked bread with inviting displays, clear product information and a distinctive range that helps the store stand out. Showcasing speciality breads, seasonal flavours and eye-catching bakes can bring the bakery experience to life, encourage discovery and give shoppers something different from the competition."

Make the bakery fixture feel like an inviting, abundant display that shoppers want to explore, advises the EU campaign's Atkins. "Think about the appeal of a European bakery or food market: golden crusts, contrasting textures, seasonal colours and clear signs of freshness all help inspire people to try something new," he says. "On a recent trip to Denmark, I was struck by how effectively a small supermarket with an in-store bakery managed its display. As products sold, the team reduced the space rather than leaving gaps, keeping the fixture looking full and carefully presented."

Make the quality and versatility of the products immediately obvious, says Geary. "The bread aisle can sometimes feel overly functional, but it is also an opportunity to inspire shoppers and encourage them to trade up or try something new. Clear signposting around different bread types, ingredient credentials and potential uses can help consumers navigate the range easily.

Geary also encourages retailers to connect bread with the occasions it serves. "Showing shoppers how a loaf can work for breakfast, lunch, entertaining or a quick midweek meal makes the category feel more relevant to their everyday lives. The aim should be to move beyond simply displaying products and instead help shoppers discover something they'll enjoy."

Shoppers make quick decisions in the bread aisle, points out Warburtons' Bebbington. "If they can find what they need and spot a new idea at the same time, they're more likely to trade up and add something extra to the basket," he says. "By reorganising the bakery aisle to be more about their need – such as healthier choices, family favourites, lunchtime solutions, snacking – consumers will find the aisle not only easier to shop and more inspiring for new meal ideas, but it will allow the retailer to inspire new uses for bakery and showcase new products."

Sources

[1] https://tinyurl.com/3vkxucpw
[2] https://tinyurl.com/y65dfa73
[3-4] Nielsen, Total Coverage, 52 w/e 03.10.26
[5] Circana, EPOS, Total Outlets, Value Sales, w/e 15.08.26
[6] IGD Shoppervista, Category benchmark research, June 2025, n=6000+ British shopping trips to Tesco, Sainsbury's Morrisons, Asda, Aldi, Lidl, M&S and Waitrose
[7] YouGov research commissioned by Warburtons: https://tinyurl.com/2wvvfc9m
[8] NIQ, Product insights, 26 w/e 10.01.26
[9] Innova, Flavour study 2022

Sourdough and beyond

[i] Circana, EPOS, Total Outlets, Sourdough, w/e 04.07.26
[ii] NIQ 52 w/e 03.10.26
[iii] See 1

GLP-1 and portion control

[iv] Kantar, State of the Nation 2026
[v] Opeepl, French pastry research 2026

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Authentic sourdough bread
French breads
Sweet bakery
Viennoiserie

As an everyday essential, bread features across breakfast, lunch, dinner and snacking occasions. From traditional loaves to artisan sourdough and speciality rolls, its versatility continues to make bakery a key category for consumers and retailers alike.

"At Aryzta, our passion for baking is rooted in a heritage stretching back hundreds of years," says Hannah Sibley, product and innovation director at Aryzta UK & Ireland. "We're committed to creating exceptional bakery products using high-quality ingredients, combining traditional expertise with innovation to deliver great taste, quality and consistency.

"We work closely with retail partners to develop private-label products spanning speciality breads, rolls, French breads, Viennoiserie, Danish pastries and more, responding to evolving consumer needs."

The in-store bakery opportunity

As shoppers increasingly prioritise convenience, freshness and quality, in-store bakeries (ISBs) offer retailers a valuable point of difference. The irresistible aroma of freshly baked bread, combined with the visual appeal of artisan-style products, creates an engaging shopping experience that encourages impulse purchases and repeat visits. ISBs also enable retailers to respond quickly to emerging trends, introduce new products and refresh ranges with minimal disruption.

Against an evolving economic backdrop, consumers increasingly seek fresh bakery products that offer affordable indulgence to enjoy at home, while the growth of artisan and specialist bakeries reflects the rising demand for premium, on-the-go bakery.

The growing appetite for sourdough

With increasing awareness of ultra-processed foods, consumers are seeking out products made with simple, recognisable ingredients and traditional production methods. Well positioned to meet these expectations, sourdough combines natural fermentation with distinctive flavour, texture and versatility. "We've spent years perfecting our sourdough recipe," explains Sibley. "Our unique sourdough starter, which celebrates its 36th year this year, is at the heart of our signature flavour. Combined with a long, slow fermentation process, it creates a beautifully balanced loaf with a great taste and satisfyingly chewy crust."







"Our unique sourdough starter, which celebrates its 36th year this year, is at the heart of our signature flavour. It creates a beautifully balanced loaf with a great taste and satisfyingly chewy crust"

Freshness and versatility

Freshness also remains a key purchase driver, with shoppers seeking products that maintain their quality for longer and help minimise food waste.

"Shoppers experience freshness through the senses," adds Sibley. "Baking our breads in-store daily creates that unmistakable aroma, alongside the golden crust and artisan appearance that consumers find so appealing. Sourdough delivers on these expectations, offering retailers a premium bakery proposition that combines traditional craftsmanship with modern consumer needs."


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Bringing fresh appeal to EU bakery

DETAILS

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KEY BRANDS

Breads
– Italian Panettone
– Dresdner Christstollen PGI

Ingredients
– Beurre Charentes-Poitou PDO

Across the EU, bakers are finding fresh possibilities in familiar products. By developing traditional recipes through grain choice, fermentation and regional ingredients, they are responding to shoppers' interest in nutrition, provenance and premium treats[1]. For UK retailers, this creates opportunities to stock EU products that combine reassurance with discovery, says Simon Atkins, bakery consultant and advisor to the EU's 'More Than Only Food & Drink' campaign.

"Sourdough is a strong starting point: rooted in European baking traditions, it allows bakers to combine locally sourced grains and regional recipes with an ancient fermentation method, while introducing new ingredients, techniques and product ideas. Across the EU, bakers are building on traditional regional recipes with locally sourced grains such as einkorn, spelt and rye, while introducing elements such as sprouted grains and seeds to create different flavours and textures. Fibre and protein inclusions can take this innovation further, helping bakers respond to nutritional interests while retaining the bread's regional character and eating quality. The aim should be bread that delivers on taste and nutritional value, with any claims supported by the finished recipe.

"The same interest in fermentation is opening up possibilities beyond the loaf," explains Atkins. "Long-fermentation methods are being applied to pastry, soft sweet doughs and sweet and savoury treats, while fermented fillings and glazes add another layer of flavour. This balance between recognition and newness also underpins premiumisation. EU classics have strong foundations in regional identity and craftsmanship; careful sourcing and production can give shoppers more reasons to value them."

Italian panettone illustrates this well, adds Atkins. "Longer fermentation, traditional techniques, hand wrapping and numbered batches can turn a seasonal staple into a considered gift. Alongside it, Dresdner Christstollen PGI from Germany, offers another Christmas speciality with protected provenance. This rich, butter-based festive loaf is traditionally made with dried fruit, candied citrus peel, nuts and spices, then finished with a generous coating of sugar. Its Protected Geographical Indication (PGI) status links it to Dresden's long-established baking tradition and gives retailers a clear provenance story for shoppers."

Traditional favourites such as croissants are also being given a premium twist through named ingredients such as Beurre Charentes-Poitou PDO (Protected Designation of Origin) from France, specialist flours, longer fermentation and carefully chosen fillings.



Dresdener Christstollen PGI from Germany

"Locally sourced grains bring different flavours and textures to an established favourite. Fibre and protein inclusions can help bakers respond to nutritional interests while preserving the eating experience"



Traditional panettone from Italy makes a considered gift

Picture Credit: GettyImages/herraez

Source
[1] https://tinyurl.com/a8actj6h


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Craft meets scale as sourdough rises

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As shoppers look to recreate café-style moments at home, sourdough is bringing excitement to the bread aisle. Data shows sourdough value sales up 54% year-on-year[1], yet only around one in four households currently buys sourdough or pre-packed artisan bread. That leaves retailers considerable room to grow the category.

At Finsbury Food Group's Salisbury bakery Nicholas & Harris, established in 1840, that opportunity is rooted in craft. The bakery combines skilled bakers, long fermentation and stone-bed ovens, with modern manufacturing to produce authentic artisan breads at scale for leading supermarkets and foodservice customers.

Sourdough's appeal spans premium taste, distinctive texture and interest in simpler ingredient lists. Half boules offer a traditional artisan look, while tinned formats introduce the category to shoppers seeking convenient loaves for everyday toasting and sandwiches.



"There is more scope to innovate in sourdough than in standard bread"

Seeded, rye and savoury flavour options provide further reasons to explore.

Paul Bown, development process manager at Finsbury Food Group, says: "There is more scope to innovate in sourdough than in standard bread. The opportunity is to keep the category exciting through flavour and format, while protecting the authenticity and quality shoppers are buying into."

Source
[1] NIQ, 52 w/e 03.10.26

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Sourdough: setting the benchmark

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Speciality breads
Sourdough
Danish pastries
Viennoiserie

Building on its multi-million pound investment in a state-of-the-art speciality bread line in Milton Keynes, Lantmännen Unibake combines efficient automation, with artisan craftsmanship to deliver consistently high-quality breads at scale

Source
[1-2] Circana, EPOS, Total Outlets, Sourdough, 52 w/e 04.07.26

The supermarket sourdough category has entered a new phase of maturity. What began as an artisan quality cue has now become a mainstream bakery staple, setting the benchmark for quality across the bread fixture. Sourdough speciality loaves have delivered 23.4% value growth[1], while a 30.2% rise in stores stocking sourdough[2] signals retailer confidence.

Simply listing sourdough is no longer enough. For retailers, the opportunity lies in giving shoppers fresh reasons to choose sourdough through premium inclusions, grains, seeds, herbs, cheeses and hybrid recipes. From bloomers and rolls to baguettes, sourdough can be taken into more missions and moments, driving value. Food-to-go carriers and wrapped formats deliver convenience. Together, the multiple formats broaden participation.

Lantmännen Unibake UK is ideally placed to help retailers unlock this potential. Its flexible capabilities across recipes, flavours and formats enable innovation, from trusted core lines to differentiated 'sourdough plus' propositions tailored to shoppers' needs.

Retailers should protect everyday favourites, identify gaps by occasion and format, and focus innovation on taste, convenience, premiumisation and evolving health priorities.



> **"The opportunity for retailers lies in giving shoppers fresh reasons to choose sourdough"**

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Master Baker

KEY BRANDS

Jason's

The humble loaf is evolving beyond its role as a household staple. Consumer interest in nutritional values, ingredient quality and everyday wellbeing is having a huge impact on the food industry – and bread isn't immune to that. "This is where our quality and craftsmanship shines through, combining the taste, texture and traditional fermentation associated with sourdough with the nutritional benefits increasingly sought by modern shoppers," says : Jason Geary, Master Baker at Geary's Bakeries.

"Over the last few years, we've established ourselves as the UK's third-largest bread brand[1] and the category leader in sourdough[2], reflecting growing consumer appetite for quality bread with a clear point of difference. A large part of our focus in this time has been on the growth of our Bread with Benefits range. This began with the launch of our Protein Loaf and Every Day Seeded Protein Rolls, delivering 10g of protein per slice and 14g per roll*."

While protein has become firmly embedded in everyday food conversations, fibre remains a relatively overlooked part of the diet, with many consumers remaining unaware of how much they should be consuming each day, or which everyday foods can help them reach that target, notes Geary. "Even though the UK Government's recommended daily allowance (RDA) for adults is 30g of fibre per day, a staggering 96% of UK adults fall short of this target, consuming an average of just 16.2g daily[3]," he says.

"That's why we expanded the range recently with the launches of the new Jason's Seeded Fibre Loaf and Every Day Seeded Fibre Rolls. Delivering 5g of fibre per slice and 8g of fibre per roll**, they're made with real sourdough, fermented for up to 24 hours and made with no additives or preservatives, creating a rich flavour and distinctive texture with every slice."



> **"Brands that can bridge the gap between enjoyment and nutrition have an opportunity to stand out. Bread with Benefits offers a way to build on the appeal of sourdough while responding to the demand for more purposeful everyday food"**

The range reflects a broader movement towards purpose-led nutrition, as consumers look for ways to support their wellbeing through everyday choices rather than relying solely on specialist products, he adds. "Fibre, protein and other nutritional benefits are increasingly part of the conversation, with shoppers paying closer attention to ingredient lists and seeking products that combine nutritional value with convenience and great taste. To aid consumers in that mission, clear fibre claims on the packs provide an immediate and understandable point of difference on the shelves, helping them make more informed choices more easily."

Looking forward, brands that can bridge the gap between great taste and nutrition have an opportunity to stand out, says Geary. "Bread with Benefits offers a way to build on the appeal of sourdough while responding to demand for more purposeful everyday food. Ultimately, the ambition is to make quality bread that consumers want to eat, with benefits that give them another reason to choose it."



Source

[1] Nielsen 52 weeks ending 11 July 2026
[2] Nielsen 52 weeks ending 11 July 2026
[3] FoodFacts (2026) Why 96% of UK adults miss daily fibre goals (and how to fix it): https://www.foodfacts.org/articles/why-uk-adults-miss-daily-fibre

* Based off average slice and roll weight
***Based off average slice and roll weight

PROPER SOURDOUGH





JASON'S SOURDOUGH

TERRIFIC TOASTED

St Pierre

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Growth through innovation

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KEY BRANDS

St Pierre
– Croissant Loaf
– Chocolate & Hazelnut Filled Croissants
– All Butter Croissant Rolls
– Mediterranean Herb Brioche Rolls
– Soft Pretzel Rolls
– Sliced Brioche Loaf
– Brioche Burger Buns
– Seeded Brioche Burger Buns
– Brioche Hot Dog Rolls

Bakery continues to prove its resilience, but as shopper habits evolve, the brands driving growth are those giving consumers new reasons to buy. For St Pierre, that means combining premium quality with innovative formats designed around the way people are eating today.

The strategy is delivering results. While total bakery has grown 3% year-on-year (YoY), St Pierre is up 17%[1], with record household penetration meaning more than 1 in 5 UK households now buy the brand, and the gap towards 1 in 4 rapidly closing[2]. Bread rolls have also delivered double-digit value growth recently, while brioche is among the bakery segments seeing a strong rise[3].

Josh Corrigan, head of UK sales at St Pierre, says: "It has been another strong year for St Pierre and, importantly, our growth is significantly ahead of the wider bakery market. With consumers looking for quality, convenience and inspiration across more occasions, St Pierre is well placed to deliver against that, helping them elevate everything from breakfast and lunch to snacking and evening meals."

Innovation remains central to the brand's growth strategy, with 2026 seeing St Pierre introduce its Croissant Loaf, Chocolate & Hazelnut Filled Croissants, All Butter Croissant Rolls, Mediterranean Herb Brioche Rolls and Soft Pretzel Rolls. "Successful NPD must do more than put another SKU on shelf," notes Corrigan. "It needs to give shoppers a new reason to buy and, for retailers, deliver incremental value. Our Croissant Loaf does exactly that, taking something familiar and presenting it in a completely different, versatile format. Our NPD also responds to demand for premium bakery that works across different and evolving occasions."

Carried-out eating occasions have grown 3% YoY, particularly across breakfast, lunch and snacks among under-44s and young families[4]. Health is increasingly important, with 67% of shoppers looking for added nutritional benefits, although taste, quality and versatility remain fundamental purchase drivers[5].

Meanwhile, product innovation is matched by continued investment in brand-building. St Pierre's 'Eat Avec Respect' platform is supported across multiple channels, while the brand works with retailers on shippers, branded bays, secondary sitings and cross-category merchandising. That is also informing St Pierre's longer-term category vision, helping shoppers to navigate bakery by occasion rather than solely by traditional product divisions[6]. "Bakery fixtures are good at telling shoppers what a product is, but there's an opportunity to show them what it is for," explains Corrigan. "Putting bakery into the context of breakfast, lunch, dinner, snacking or treating can inspire shoppers and unlock new usage occasions."

With its distinctive orange branding and premium positioning delivering on-shelf standout, St Pierre is the UK's No.1 brioche brand, and the fastest-growing of the top 10 continental bakery brands[7]. Corrigan concludes: "We've got strong momentum and an exciting innovation pipeline, but our ambition is to keep giving shoppers new reasons to visit bakery while offering our retail partners new opportunities to grow the category."



> **"Putting bakery into the context of breakfast, lunch, dinner, snacking or treating can unlock new usage occasions"**



Source

[1-2] NIQ, L52 w/e 03.10.26: Total bakery +3% YoY; St Pierre +17% YoY; St Pierre shopper penetration 22.4%.
[3] Federation of Bakers Market Review 2026, 52 w/e 22.03.26: Bread rolls/baps +10.7% value; brioche identified among areas of strong growth.
[4-6] St Pierre Category Vision/NIQ U&A and Kantar State of the Nation 2026
[7] NIQ, 52 w/e 03.10.26

ST.PIERRE

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ADDING VALUE TO THE CATEGORY
WITH A PREMIUM OFFERING

EAT AVEC RESPECT

*Circana | total outlets | Last 52wks to 21st Feb 2026 | Total £ sales. **Circana | total outlets | Last 52wks to 21st Feb 2026 | ACV weighted £ROS)
***Circana | 52 w.e .24.01.26 | Fastest-growing in the top 10 brands.

Warburtons

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150 years of innovation

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KEY BRANDS

Warburtons
– Bread & Rolls
– Bagels
– Crumpets
– Fruit Loaves & Teacakes
– Pancakes, Potato Cakes & Muffins
– Pittas
– Sandwich Thins
– Thin Bagels
– Flatbreads
– Gluten Free bakery
– Waffles

There are not many brands that get to celebrate their 150th birthday, but this year the No.1 bakery brand[1], Warburtons, did just that. That's 150 years of investing and innovating and is exactly what they continued to do this year.

The drive for innovation in bakery is essential for the category to remain relevant by exciting consumers and therefore fuelling future category growth. In the last 12 months alone innovation has stemmed what would otherwise have been a category decline of 1.6%[2] and it is no surprise that Warburtons is leading the charge, delivering 23% of branded bakery NPD volume and 31% in bread[3]. Not only do they innovate, but the products Warburtons launches seem to hit the spot for consumers, with 79% of everything Warburtons has launched in the past three years still on sale, compared with 67% across wrapped bakery as a whole[4].

"Putting the consumer at the heart of our innovation plan is key, understanding what their needs are and responding by providing them with the best quality offering available," says Colin Bebbington, commercial director at Warburtons.

Launching into premium rolls this year has proven a great success and taken Warburtons into a new category with its Tiger Rolls and Brioche range. Its Brioche Hot Dog Rolls have become the brand's top launch of 2026 so far, selling 942,000 units[5]. "Taste and quality are the number one reasons for buying bakery and therefore, expanding our popular Tiger range into rolls, and entering the premium rolls market just made sense as consumers love to buy from a brand known for quality," says Bebbington.

Health is undoubtedly reshaping bakery. "Consumers aren't looking for products that are low in fat or offer fewer calories, they're seeking out products which offer them positive nutritional benefits such as fibre or protein[6]."



"Bread and bakery is perfect for people looking to fill the fibre gap, because it's already part of everyday meals"

Given the UK's fibre deficit[7] there is a real opportunity for bakery to be part of the solution and grow as a result. "Bread and bakery is perfect for people looking to fill the fibre gap, because it's already part of everyday meals," says Bebbington. "We want healthy eating to be easy, delicious and affordable for every family."

And of course, Sourdough continues to increase in popularity as it spans both premium quality and perceptions of a more natural, 'better for you' product. Warburtons 'Our Dough' range, which brings the sourdough trend into everyday bread with a gentle sourdough flavour reached £8.3m in value sales in its first 10 months[8] and, this autumn, Warburtons expanded the range with Bagels, Crumpets and Soft White Rolls. "Shoppers want bread that offers something a little more special every day, and Our Dough gives them that in the soft, everyday formats they already love," says Bebbington.



Source

1 Nielsen IQ, EPOS data, L52 w/e 03.10.26
2 Nielsen IQ, EPOS data, based on L52 w/e 18.04.26
3-4 Nielsen IQ, EPOS data, based on L12 w/e 18.04.26
5 Nielsen IQ EPOS data. L52 w/e 03.10.26
6 Warburtons Health Tracking, Nat rep UK sample of c.6000 respondents over the course of 2025-26
7 British Nutrition Foundation: https://www.nutrition.org.uk/news/fibre-report
8 Nielsen IQ, EPOS data, L52 w/e 03.10.26

PACKED WITH PROTEIN

FROM THE UK'S **NO.1** BAKERY BRAND*



Warburtons

warburtons.co.uk

*Based on NielseniQ RMS data for the Wrapped Bakery Category for the L12week period ending 05/09/26 for Grocery Multiples, Total Wrapped Bakery Unit Sales (Copyright 2020 Nielsen IQ)
**Protein Flatbreads, Protein Pittas and Protein Power are High in Fibre.

William Reed.

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