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The Grocer Guide to...

The
Grocer

Bread & baked goods

INTRODUCING **NEW** HOVIS® **SOURDOUGH**



Success in sourdough

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Hovis White Sourdough
Hovis Seeded Sourdough
Hovis Farmhouse Batch
Wholemeal with Oats
Hovis Farmhouse
Batch White
Hovis White 'N Fibre
Hovis Sub Rolls
Hovis Signature White

HoVIS is one of the UK's biggest bread brands and has recently unveiled its first-ever sourdough range to tap into the growing consumer demand for high-quality sourdough bread and provide an accessible option to the one in four consumers looking for a change from traditional sliced bread¹.

Evolving occasions

"For many consumers, sourdough has evolved from an occasional weekend treat to something that is consumed across multiple occasions and throughout the week," says Mark Brown, chief marketing officer at HoVIS. The category is now valued at more than £170 million³ with 26% category penetration and there is a significant over-index across multiple age groups for claimed consumption of sourdough, notably in 35 to 64-year-olds⁴, which aligns with the demographic of consumers that typically purchase HoVIS.

"This popularity is fuelled by evolving consumer preferences and attitudes to food and our expansion into the category is perfectly positioned to encourage trade-up within the bakery aisle, offering greater consumer choice as well as driving broader appeal for sourdough and attracting new shoppers to the category," notes Brown.

Innovation

HoVIS' two-strong Sourdough range consists of a White Sourdough Cob and a Seeded Sourdough Cob, which were in development for over a year. The cobs use the HoVIS signature starter dough which is slowly fermented for over 24 hours. This process results in cobs that deliver a thick, golden crust and great flavour.

"We are combining over 130 years of baking experience and heritage with the highest quality ingredients to meet the growing needs of consumers looking for genuine sourdough loaves with great taste and texture. "Consumer



“Sourdough has evolved from an occasional weekend treat to something that is consumed across multiple occasions”

reaction from taste tests has been fantastic, particularly when toasted or paired with toppings, showing the cobs' versatility and appeal," he adds.

The launch presents a significant opportunity to make sourdough more accessible to a wider range of shoppers, helping retailers to boost premium bread sales with an exciting new offering from a trusted household name.

The Sourdough range joins the raft of NPD launched earlier this year to meet shopper needs: White 'N Fibre, Sub Rolls, Signature White and Farmhouse Batch Wholemeal with Oats.

Growth opportunity

"The sourdough category has seen phenomenal 56%⁵ growth in the past year but there is still plenty of headroom for further growth. With the introduction of our new Sourdough cobs, there will be greater choice for shoppers in this category and an opportunity to recruit the 3 in 4 households that don't currently buy sourdough⁶", he concludes.

HoVIS' Sourdough launch will be supported by a comprehensive marketing campaign.



Source

- ¹ Vypr research, February 2025
- ² NIQ ConsoUsage, April 2025
- ³ NIQ Scantrack, 52 w/e 06.09.25
- ⁴ NIQ ConsoUsage 2025, April 2025
- ⁵ NIQ Scantrack, 52 w/e 06.09.25
- ⁶ NIQ Homescan, 52 w/e 25.01.25

Analysis



What's rising in UK bakery?

As weight of purchase declines and cost-of-living pressures persist, Britain's bakery category is betting on premiumisation and functionality

While traditional white sliced bread maintains its position as a household staple, sourdough is gaining substantial ground. Health-conscious shoppers are demanding more from their daily loaf, and premium products are extending beyond weekend treats to everyday purchases.

"The UK sourdough market is booming; the category is now valued at more than £170m¹ with 26% category penetration², and it is seeing 56% year-on-year growth³," says Mark Brown, chief marketing officer at Hovis. "For many consumers, sourdough has evolved from an occasional weekend treat to something that is consumed across multiple occasions and throughout the week⁴." This substantial growth has prompted major players to enter the category. Hovis launched its first-ever sourdough range this year.

"Directly addressing the growing consumer demand for high-quality sourdough bread, the launch provides an accessible option to the one in four consumers looking for a change from traditional sliced bread⁵," Brown adds.

On the other hand, for specialist producers, the boom has brought challenges. "The shift towards the artisanal and sourdough bread has continued to grow since 2024, with more brands venturing into the sourdough world," explains Jason Geary, master baker at Geary's Bakeries, which produces Jason's Sourdough. "However, not all sourdoughs are made equal. Some are proper sourdoughs, made using no added yeast and fermented over 24 hours. Some take short-cuts and add sourdough ingredients into a standard bread process."

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Meanwhile, Hannah Sibley, product and innovation director at Aryzta UK & Ireland, notes: "As consumers navigate UPF concerns we've seen an even greater demand for all things sourdough this past year due to its natural nutrients and limited processed ingredients."

Balancing quality and cost

While certain segments flourish, the overall market presents a mixed picture. "Pre-packaged sliced bread has continued to be a key purchase this year, with 1.5 billion⁶ loaves being sold over the past year and over 96% of households in Great Britain buying into the category⁷," reports Hovis' Brown.

However, Rachel Wells, group commercial director at St Pierre Groupe, maintains that "weight of purchase is down slightly, with shoppers putting

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less in their baskets as they continue to seek quality food experiences at home while balancing cost of living pressures". This behaviour suggests consumers are becoming more selective, seeking quality experiences whilst keeping their household budgets in check, she says.

For speciality bread, on the other hand, the outlook is more positive. "Speciality bread is set to continue its growth trajectory as we move into 2026," explains Samantha Winsor, Lantmännen Unibake UK marketing manager. "It is an expanding retail market, valued at £190m, growing by 12% in the last year⁸."

Overall, Hovis' Brown believes "there's a steady increase in the average number of different types of products bought by each household, which suggests that shoppers are increasingly interested in enjoying a variety of bread and baked goods at home⁹".

Moreover, with shoppers' patterns coming back to a post-pandemic era, "it has been an interesting year, particularly for convenience, which is a growing channel as people return to pre-pandemic working and commuting patterns", says St Pierre Groupe's Wells. "Half of convenience visits are focused on food-to-go only, meaning shoppers want food that can be consumed immediately." The company's six-pack Croissants, six pack Pain au Chocolat and crepes are benefiting from the growth in impulse purchases – sold as a multipack but with the option to eat on-the-move, she adds.

"We have seen a clear shift in consumer behaviour, with shoppers seeking flexibility and convenience without compromising on authenticity or taste," says Geary's Bakeries' Jason. "Our sliced everyday loaves and rolls are perfect for daily use, while our recently launched Whole Boule is designed to take centre stage on the dining table, ideal for sharing with family or guests."

Building benefits into bread

New product development is being clearly influenced by health considerations, with fibre and protein establishing themselves as an important presence in consumer's pursuit of balanced diets.

Consumers are also looking for nutritional advantages in a product that looks good and tastes great.



"Consumers want products that look and taste good, but also tick the box on offering nutritional benefits, particularly aligning with evolving consumer health priorities like increased protein and fibre," explains Aryzta's Sibley. In a crowded market, these claims also offer a point of difference to stand out against competitors. "Shoppers look to protein to help them feel fuller for longer, alongside building muscle mass.

“Health and functionality continue to be strong drivers in the bread category and at the heart of sourdough surge in popularity, with fermented foods gaining attention for their perceived wholesomeness”

Similarly, fibre encourages fullness and helps with digestion and general wellness. Both nutrients can be found in breads like sourdough," she adds.

Lantmännen's Winsor observes that health is the third most important sales driver for ISB speciality bread consumers¹⁰, from gut-health derived from sourdough's fermentation process to 'clean label' recipes or added inclusions that maximise health benefits, such as rye flour, fresh herbs, nuts and seeds.

"There is also the consumer desire to see the use of superfoods, probiotics or adaptogens such as matcha or turmeric to elevate baked goods without compromising on quality or taste," she notes, adding that Lantmännen Unibake UK sourdough is a good source of fibre as it contains at least 3g of fibre per 100g serving. "When clearly communicated to the end-customer, these nutritional markers, and therefore perceived health benefits, can



Texture and flavour innovation

The bakery category is experiencing notable flavour innovation.

“Global flavour influences are increasingly shaping the bread & baked goods category, as consumers look beyond the familiar for more diverse and engaging taste experiences, highlighting strong interest for nostalgic Mediterranean flavours (52%), comforting, treat-inspired sweet profiles (28%), punchy Indian flavours (26%) and Tex-Mex inspirations (22%)¹²,” explains Lantmännen’s Winsor. “The Mediterranean trend continues to show up through ingredients such

as olive, sun-dried tomato, rosemary and oregano. We’re also seeing the rise of Indian and Tex-Mex influences signalling consumers’ willingness to embrace bolder, more vibrant flavours such as spiced flatbreads, chilli and cumin infusions,” she adds.

With texture playing an equally important role consumers are being drawn to breads that offer a multi-sensory experience. “Think crunchy nuts, juicy fruits, rich spices, and even bitter notes such as coffee create depth and indulgence,” adds Winsor. The ‘swavoury’ and ‘swicy’ trends, are

also shaking up the bakery category, particularly within speciality inclusion breads,” she says.

“Combinations such as coffee and date, cranberry and cashew, or fig with black pepper are adding subtle sweetness and richness to savoury doughs.”

“Led by Gen Z consumers, who want variety and exciting flavour profiles, we’re seeing demand for different flavour and texture combinations, alongside the need for traditional plain breads,” explains Aryzta’s Sibley.

“Not only do we supply different size formats, baked fresh

in our state-of-the-art bakery, we also supply breads with flavour inclusions such as cheese, jalapeño, olives and seeds. We have something to suit every taste,” she reveals.

Some brands have launched limited editions, such as St Pierre Groupe, which introduced its Spicy Chilli Brioche Buns in Q2 this year, reveals Wells. “We have been seeing a rise in global cuisines at a total grocery level, trickling down into bakery – particularly with the growth of flavoured flatbreads, wraps and rolls, bringing new cultural profiles to their meals in an easy way.”

help drive sales of speciality bread,” she says.

“Bread has been a cornerstone of healthy eating for generations, providing protein. The majority of our breads contain a source of fibre and a real strength of the category is in its versatility,¹¹” says Hovis’ Brown. With growing consumer awareness around fibre as an exciting opportunity to further educate and empower shoppers to make healthier choices Hovis launched White ‘n Fibre this year. “White bread remains popular among consumers, however 23% now state that fibre is important to them¹³,” notes Brown. “Our White ‘n Fibre helps people to increase their fibre intake without sacrificing their favourite bread type, offering 3.8g fibre per 100g compared to 2.5g seen in standard white breads.”

Likewise, protein has gained equal traction in the category. “The Protein loaf, in particular, has been a great success, with consumers wanting to

supplement their protein intake in a simple, everyday manner, without having to consume products that are overly processed or costly,” explains Geary’s Jason. “Health and functionality continue to be strong drivers in the bread category and at the heart of the sourdough surge in popularity, with fermented goods gaining attention for their perceived wholesomeness,” he adds.

Social media’s strategic role

Social media has become a central component of brand strategy within the bakery sector. As younger consumers turn to digital platforms for product research and meal planning inspiration, brands are adapting their approaches to meet their audiences online. According to YouGov, 66% of Gen Z consumers use social media as a research tool for brands and products – a behaviour that has important implications for how bakery brands

approach their marketing strategies.

“We recognise the growing importance of social media, especially for younger consumers, in terms of providing inspiration for products as well as for mealtime planning,” says Hovis’ Brown.

Hovis allocated £1m to shopper activation for its Sub Rolls launch earlier this year, with social media forming a substantial component. “Consumers had the opportunity to scan QR codes for instant recipe inspiration to help them create deli-style lunches at home,” Brown explains.

For brands launched in recent years, social media has been fundamental in their market entry strategy. “Social media is key to us at Geary’s in bringing our brand values to life,” says Jason.

“Since our launch in 2020, we have very much focused on creating a community with our social media following, engaging with everyone

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and sharing everyone's obsession with good food and proper sourdough, all while having a bit of fun and not taking ourselves too seriously," he explains. "We also work closely with food influencers to develop and share recipes that show younger audiences how bread can be both exciting and versatile.

"There's a huge opportunity for retailers to utilise their social platforms to promote bread and baked goods in-store and online by highlighting products on promotional offers and spotlighting 'new in the bread and bakery aisle' launches – but it has to be done in an authentic, relatable way," he adds. At St Pierre, digital platforms have become essential to reaching their target audience. "Social media plays a key role in our marketing mix. Inspiration is huge for the St Pierre shopper, and social media is a great way to deliver new recipe ideas or flavour combinations that drive brand awareness and encourage trial," says Wells. "We've also explored new paid partnerships with high-profile influencers to further drive online engagement, increase awareness and drive trial."

The pattern across brands suggests social media's function in the bakery sector has moved beyond conventional advertising metrics. It serves as a means of maintaining ongoing dialogue with consumers – particularly important for a category where purchase decisions can be habitual and brand loyalty historically strong.

Appearance and appetite appeal

In a category where products can appear visually similar and differentiation is challenging, how should retailers best present bread and baked goods on-shelf? This challenge is especially difficult in bakery, where efficiency often conflicts with creating an attractive shopping experience.

"In-store bakery (IBS) shoppers value quality and freshness, these cues should be amplified across merchandising at shelf and even further through store positioning, where the aroma of freshly baked good can further attract customers to the fixture," explains Lantmännen's Winsor. "Retailers should look to capitalise on this momentum and ensure their speciality bread range caters for every occasion, while maintaining the fundamentals that matter most



to consumers," she notes. "The key purchase triggers for speciality bread are freshly baked appearance (96%) with a crisp outer crust (62%) and made with quality ingredients (70%) to warrant the spend¹⁴."

Winsor also identifies a challenge in helping shoppers navigate expanding ranges. "ISB ranges are now changing seasonally, with new additions to core

or seasonal ranges. These should be better signposted through point-of-sale (POS) merchandising and packaging to allow them to stand out from the sea of bakery beige. Breaking regular shoppers' routine and encouraging new shoppers to try something new, creating increased category penetration and the perfect trade-up to premium opportunity for retailers."

The convenience channel presents particular challenges and opportunities. "What we need to work on now, in the category, is growing bakery affiliation with the 'food for now' mission, particularly in convenience stores," maintains St Pierre Groupe's Wells. "Bakery is not necessarily at the forefront of shoppers' minds when they come into store looking for food to go, so we need to think about how we

“The convenience channel presents particular challenges and opportunities. We need to work on growing bakery affiliation with the ‘food for now’ mission”



£170m

Value of the UK
sourdough market

NIQ Scantrack, 52 w/e 06.09.25

£1.5bn

Pre-packed sliced loaves
sold in the UK over the
past year

*NIQ Scantrack, unit sales, total pre-
packed sliced bread, 52 w/e 06.09.25*

£190m

Value of the UK's
speciality bread market

Circana (excl Lidl), 52 w/e 02.08.25

66%

of Gen Z research brands
and products via socials

*YouGov, How Gen Z shops in the UK,
August 2025*

disrupt that shopper journey and build consideration. Our range of free-standing display units (FSDUs) and merchandising solutions are a great way to do this and have proven effective – particularly in convenience settings where floorspace is more limited – in driving impulse bakery sales,” she adds.

Brown from Hovis argues that the fundamental issue is one of fixture design and positioning. “Merchandising fixtures for in-store bakery and pre-packaged bread are very different,” he observes.

“In-store bakery has differentiated fixtures which deliver fresh, artisan and premium cues, which pre-packaged bakery could – and should – also benefit from. Pre-packaged bakery uses baskets, shelves or a mixture, which focuses on efficiency as some

sub-categories have a very high rate of sale but can compromise the shopper experience.”

He puts the case for a more elevated approach to the pre-packaged category. “Pre-packaged bakery should be differentiated or elevated versus other areas of packaged grocery as it is a more emotive area, as well as having a short shelf life, whilst maintaining some of the specialness of in-store bakery,” adds Brown. “Employing engaging POS material can help shoppers navigate a variety of subcategories and usage occasions.”

Brown’s recommendations include both in-store and cross-channel approaches. “We would recommend that stores enhance their pre-packaged products wherever possible - for example, cross-promoting with other favourites to help provide inspiration

for shoppers to create more special bread occasions. We also recommend supporting the category in-store with engaging off-shelf features, which can include gondola end displays and promotional shelf POS.

“In-store activation can also be aligned to wider brand activation, including retailer online sites, using occasion-led visuals to inspire elevated meal choices,” he adds.

“Another way that brands and retailers can maximise impact in-store is to leverage partnership opportunities around key cultural moments – such as major film launches,” notes Brown.

Hovis recently partnered with Universal Pictures’ *Wicked: For Good*, the epic conclusion to the global cinematic phenomenon, with an exclusive on-pack promotion.

“This collaboration provides an

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opportunity to capitalise on the buzz around the film with additional display and retail media opportunities to help generate further sales in the category,” he explains.

Looking ahead

Industry leaders are optimistic about continued growth in the bread & baked goods category. With health and wellness leading the way in the functional space brands believe the biggest opportunity is in sourdough as this category has seen phenomenal 56% growth in the past year but there is still plenty of headroom for further expansion¹⁵.

“With the introduction of our new Sourdough Cobs, there will be greater choice for shoppers in this category and an opportunity to recruit the 3 in 4 households that don’t currently buy sourdough¹⁶,” says Hovis’ Brown. Geary’s Jason also expects the momentum for proper sourdough, made with simple, high-quality ingredients, to continue growing. “The traction towards products with added benefits but less ingredients will definitely roll over into 2026,” he says. “As more shoppers steer

“Retailers with in-store bakeries in prime, high-visibility areas, featuring a portfolio of breads and baked goods, will benefit the most from sales”

towards artisanal options, we see great potential to grow the category by combining craft with accessibility and educating consumers on the benefits of our products.”

As health and wellness trends continue to drive purchase decisions, bakery provides opportunity for shoppers “to elevate simple meals and this trend for ‘easy premiumisation’ has served St Pierre well”, reveals St Pierre Groupe’s Wells. “Consistent quality keeps shoppers coming back and quality is at the heart of everything we do,” she says. “We are exploring opportunities around continued product improvement, new limited-edition SKUs that drive excitement in the category, in the same way our Spicy Chilli Brioche Buns did this year, and

ensuring that we can deliver quality solutions across the bakery occasions sub-category, particularly in breakfast and lunch and evening meals, where we see the opportunity to serve shoppers with new, quality products that will elevate their at-home meals.”

Nonetheless retailers need to be mindful of shopper’s surge in demand for convenience. “With time-poor consumers looking for everything under one roof, retailers with in-store bakeries in prime, high-visibility areas, featuring a portfolio of breads and baked goods will benefit the most from sales and repeat footfall,” concludes Aryzta’s Sibley.

Sources

¹ NIQ Scantrack, 52 w/e 06.09.25

² NIQ Homescan, pre-packaged sourdough, 52 w/e 06.09.26

³ NIQ Scantrack, 52 w/e 0.6.09.25 vs previous year

⁴ NIQ ConsolUsage, April 2025

⁵ Vypir research, February 2025

⁶ NIQ Scantrack, unit sales, total pre-packaged sliced bread, 52 w/e 06.09.25

⁷ NIQ Homescan, Penetration, total pre-packaged sliced bread, 52 w/e 06.09.25

⁸ Circana (excl Lidl) 52 week to the 2nd Aug 2025

⁹ NIQ Homescan, average number of pre-packaged

bakery occasions sectors bought, 52 w/e 06.09.25 vs 52 w/e 11.09.21

¹⁰ Opeel – Lantmännen Unibake – In-Store Bakery Speciality Bread Research – July 2025

¹¹ Bread is a source of protein which contributes to the maintenance of muscle mass if eaten as part of a healthy balanced lifestyle and diet.

¹² See 10

¹³ Mintel research in March 2025

¹⁴ See 10

¹⁵ NIQ Scantrack, 52 w/e 06.09.25

¹⁶ Nielsen 52 w/e 25.01.25



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KEY PRODUCTS

Authentic sourdough bread
French breads
Sweet bakery
Viennoiserie

➡ If you ask consumers to explain their weekly meal plans, you're guaranteed to find bread on that list, in all sorts of different formats and across breakfast, lunch, dinner and as a snack.

"At Aryzta, since the 19th century, we've been committed to producing the highest quality breads from the highest quality ingredients. Our priorities are simple, develop products with great taste, consistency that create memorable foods for our customers," says Hannah Sibley, product and innovation director at Aryzta UK & Ireland. "We work closely with our partners to develop and manufacture private-label products spanning speciality bread and rolls, French breads, viennoiserie, Danish pastry and much more".

In-store bakeries offer a point of difference for retailers, drawing shoppers with the smells of freshly baked bread and pastries and the visual appeal of the finished goods. Convenience is high on shoppers' agendas, as they're looking to find everything under one roof so offering a bakery setting within stores drives purchase and repeat footfall.

In-store bakeries are known to stock more premium breads that are generally believed to contain more nutrients. Retailers with in-store bakeries also have more opportunities to react quickly to trends and consumer needs, getting new products on shelves fast. Another key purchase driver is for functional foods that contain fewer ingredients. Higher protein and fibre contents are top priorities for



“Retailers with in-store bakeries have more opportunities to react quickly to trends and consumer needs”

consumers, so products that contain these nutrients are a guaranteed best seller. Both of these nutrients can be found in high quantities in breads like sourdough.

Sourdough offers a range of health and culinary benefits that set it apart from conventional bread. Made through a natural fermentation process, sourdough is often easier to digest and gentler on the stomach. Beyond health perks, its signature tangy flavour and chewy texture make it a favourite for those seeking a more artisanal and flavourful experience.

"Our unique sourdough starter is 33 years old this year and the starting point for our enticing, tangy flavour," she adds. The dough has also a long slow fermentation giving the loaf an open, waxy texture, chewy crust and a mild flavour, which makes it the perfect base for any sandwich or meal accompaniment.

"Freshness is another important factor; shoppers want to purchase breads with a longer life and less wastage," says Sibley. "Sourdough, with its natural preservatives, provides a great solution. "We're also seeing an increase in demand for bigger loaf formats across our portfolio. Shoppers are expanding their bread consumption across more at home occasions, so they're looking for large formats that will stay fresh longer and sourdough is the perfect solution."



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KEY BRANDS

Jason's Sourdough

For Jason's Sourdough, 2025 has been a brilliant year full of new product development and brand growth, driven by our ambition to make proper sourdough accessible to everyone across the UK.

With consumers increasingly seeking artisanal products, we continue to meet demand by putting traditional craft at the heart of our ranges.

We remain committed to maintaining our position as the UK's No.1 Sourdough brand¹ and have more than doubled our retail sales value for the 5th successive year, a testament to both the quality of our loaves and the growing customer loyalty.

One of our most exciting developments this year has been the introduction of our Jason's Sourdough Proper Sourdough crumpets. Made the proper way with just four simple ingredients - flour, water, salt and fermented wheat flour - our crumpets are naturally leavened with no added yeast, no added sugar and no baking powder. We designed these crumpets with the growing consumer interest in simpler ingredients for all occasions. This launch builds on the success of five other exciting new products placed on shelves earlier this year.

Back in June, we expanded our portfolio with the launch of the Jason's Sourdough Creations which comes in two imaginative flavours: Fruit Loaf and Olive & Basil. These were created to deliver more variety, taste and quality, whilst giving consumers more choice for different occasions.

At the same time, we launched Jason's Everyday Seeded Protein Rolls, expanding our protein range to meet the increased demand towards protein products. With our protein range, our aim is to combine innovation with tradition, whilst maintaining exceptional quality.

More recently we unveiled the Jason's Sourdough Whole Boule, crafted using the same loved recipe as our sliced best seller, the Great White Loaf. Unlike our sliced loaves, the Whole Boule is designed to be shared with friends and family, offering them the freedom to cut it thick, thin, rustic or redefined,

UK's NO.1 SOURDOUGH BRAND

87.1% YOY Growth

JASON'S SOURDOUGH
An every day obsession

FERMENTED 24 HOURS | PROPER SOURDOUGH | NO ADDED YEAST

NO SHORTCUTS

“More consumers are seeking products made with clear, simple ingredients”

making them perfect for any occasion. These launches follow the opening of Geary's new £36 million custom-built bakery in Leicester announced earlier this year, increasing capacity while staying true to the bakery's heritage.

We continue to support our brand through bold in-store visibility – both in our packaging and at fixture branding such as the branded bays in Tesco – and engaging digital content.

Most recently we invested in a fully integrated plan spanning across radio, outdoor, retail activation, press, digital and social, ensuring the campaign brought Jason's passion for sourdough to a nationwide audience.

This generated widespread media coverage, further amplifying the brand campaign and our core values.

Looking forward, more consumers are seeking products made with clear, simple ingredients. Our focus is on driving awareness and educating those who want to make healthier, more informed food choices.

Source

¹ Pre-packed bread worldpanel, 52 weeks to 07.07.2025

UK's
NO.1
SOURDOUGH
BRAND

87.1%
YOY
Growth*



JASON'S
SOURDOUGH
An every day obsession


FERMENTED
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HOURS

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**NO ADDED
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✗ NO SHORTCUTS

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* Worldpanel by Numerator 52we 05.10.25

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Engage shoppers and grow speciality bread

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Danish Pastries
Viennoiserie

➡ The speciality bread market is rising fast, now valued at £190m and up 12% year on year¹. Purchased by nearly one in five UK households², speciality bread has evolved from an occasional indulgence to being more regularly consumed every day.

At Lantmännen Unibake UK, we invest in quality and innovation, in line with these dynamic trends. Our state-of-the-art speciality bread line combines our baking heritage with cutting-edge technology to deliver premium quality, consistency and innovation at scale.

From visible fruit pieces to seeds and grains, our speciality breads deliver on quality, flavour, texture, and visual appeal. We've developed a sourdough flavour spectrum from subtle white sourdoughs to nutty browns and a full-bodied San Francisco-style tang.

Our ciabatta uses high-hydration doughs, sourdough, inclusions, and extra virgin olive oil to create a soft, open crumb and crisp artisan crust.



“Evolving trends offer fresh opportunities to elevate in-store bakery experiences”

We constantly review opportunities through kitchen innovation, market and consumer research to ensure we deliver commercial results for our retail partners. In 2026, we expect demand for loaves with inclusions to continue to grow in consumption occasionality: inclusions allow retailers to provide more interesting flavour profiles, quality ingredients, added health benefits and visual appeal.

Source

¹ Circana (excl Lidl) 52 w/e 02.08.25

² Kantar 52 w/e 23.03.25



From innovative, market-leading Danish pastries to artisan speciality breads



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Explore our range: lantmannenunibake.co.uk

St Pierre

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Elevating everyday occasions

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VP Global Marketing

KEY BRANDS

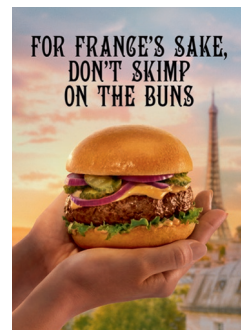
Brioche Burger Buns
Seeded Brioche
Burger Buns
All Butter Croissants
Sliced Brioche Loaf

The UK bakery market continues to evolve, shaped by changing shopper behaviours and the ongoing appetite for premium, versatile products that elevate everyday meals.

While total bakery has seen modest growth in 2025, bakery occasions – covering breakfast, lunch and evening meals, as well as snacking – remains the standout success story, growing in both value and volume¹, reveals St Pierre commercial director Rachel Wells. “This is where St Pierre continues to lead the way, driving category growth through a combination of innovation, brand-building and a focus on quality,” she says.

Over the past year, St Pierre has maintained its position as the UK’s No.1 brioche brand², delivering continued value and volume growth across key occasions. The brand has seen particularly strong performance in rolls and continental bakery, with rolls up 6% year on year³ and crêpes reclaiming the No.1 spot in their category⁴. St Pierre’s Croissants and Pains au Chocolat are now among the top five branded SKUs in continental bakery⁵, cementing the brand’s leadership in the premium breakfast fixture.

This year saw the launch of St Pierre’s Spicy Chilli Brioche Buns – a limited-edition SKU that tapped into the rise of the ‘swicy’ flavour trend and the growing demand for globally-inspired innovation in bakery. Blending St Pierre’s signature soft, golden brioche with a hint of spice, the launch introduced new excitement to the rolls fixture and proved incremental to the category, notes Wells. “Limited editions like this show the brand’s ability to anticipate trends and deliver NPD that feels fresh and relevant, with further innovation planned for 2026,” she says.



“St Pierre continues to drive category growth through a combination of innovation, brand-building and a focus on quality”

St Pierre’s tongue-in-cheek ‘Eat Avec Respect’ campaign, which celebrates the brand’s authentic French heritage, returned to TV this year, backed by robust shopper marketing, including off-shelf activations, FSDUs and cross-category merchandising partnerships. The campaign helped deliver a strong uplift in rolls volume and attract new shoppers to the category⁶.

Breakfast continues to be a growth driver for the brand, and St Pierre’s nationwide Tesco listing for its 2-pack All Butter Croissants has strengthened its presence in this booming sector, where croissants are delivering 17% value growth year on year⁷.

“As the market moves into 2026, St Pierre will continue to explore limited editions that drive excitement and incremental growth,” adds Wells. “St Pierre is perfectly positioned to continue leading growth in bakery occasions and inspiring shoppers to make ‘Everyday Moments Magnifique.’”

Source

¹⁻³ Circana, St Pierre brand, Ambient, Bakery Occasions, CYTD 12.07.25

⁴⁻⁵ Circana, YTD, Bakery Occasions, 04.10.25

⁶ Circana- Ambient Bakery | Top 10 Major Brands | YTD 06.09.25

⁷ Kantar, Total Market, Total Bakery, Ambient, 29.09.24 vs YA





- NUMBER ONE -

BRIOCHE BRAND IN THE UK*



**FASTEST GROWING
CONTINENTAL BRAND IN 2025****

NO.1 CRÊPES BRAND IN THE UK*

**DRIVING GROWTH IN BAKERY
OCCASIONS, BRINGING NEW CUSTOMERS
INTO BREAKFAST & LUNCH & EVENING MEALS****

EAT AVEC RESPECT

Elevating waffles and croissants

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Waffle Amour
Mars Croissants
Milkway Croissants
Galaxy Croissants
Hallo Deutsche Bäckerei
SpudBros
Sides Coffee
Tasty Vibes
The Flan Co
Kuchenmeister
Oreo Fresh Milk-Snack

With indulgence, convenience and licensed innovation converging, United Food Brands (UFB) is continuing to shape the sweet bakery landscape, says CEO Richard Reeves. “The company’s ability to combine brand strength with retailer collaboration has positioned it among the most agile players in the UK’s morning goods category,” he says.

This autumn marked a major win for UFB as its Milky Way Filled Croissants achieved full national distribution in Tesco, building on existing listings in Asda and Morrisons. “This shows how strong the demand is for indulgent bakery when both quality and brand align,” notes Reeves.

Also this year, UFB has continued to strengthen its footprint with new listings in Q2 across Booker Retail, Nisa and Spar, for its Mars and Milky Way Croissants and Waffle Amour range.

Strengthening category leadership

UFB’s iconic Waffle Amour brand continues to lead the waffle segment, maintaining a 22% market share and confirming its position as the UK’s No.1 Belgian waffle brand¹. Growth has been driven by strong performance across key formats. Toasting Waffles have seen a 27% value gain, while Chocolate Waffles have grown 7.2% following a successful pack redesign last year².

Further extending its NPD pipeline, UFB is unveiling Waffle Amour Dusted



“Further extending its NPD pipeline, United Food Brands is unveiling Waffle Amour Dusted Heart dessert waffles, designed to tap into the indulgent dessert at-home trend. It will also launch the Galaxy Filled Croissant, the most exciting addition yet to its licensed bakery portfolio”

Heart dessert waffles, designed to tap into the indulgent dessert at-home trend. “These are a quick and effortless way for shoppers to elevate their waffle dessert experience, allowing consumers to add ice cream, sauces or toppings and create a restaurant-style treat at home,” says Reeves.

Looking ahead to 2026, UFB will introduce a Waffle Amour seasonal Cinnamon and Gingerbread range, bringing festive flavours to the brand.

Galaxy joins the line-up

Building on its momentum this year, UFB is also launching the Galaxy Filled Croissant, the most exciting addition yet to its licensed bakery portfolio. The launch, with rollout expected during Q2 2026, is set to generate strong interest across both retailers and shoppers, who see Galaxy as the next big success in the licensed bakery aisle. “Galaxy will be the standout innovation for 2026 – indulgent, premium and perfectly aligned with consumer demand for affordable luxury,” says Reeves.

Looking ahead

In the year ahead, UFB plans deeper retailer collaboration, broader distribution and an unrelenting focus on quality. “With Galaxy entering the market and innovation across Waffle Amour, we’re not just following trends, we’re setting them,” says Reeves. “Expect more reasons for shoppers to choose UFB brands in 2026.”



Source

^{1,2} Nielsen, Total Coverage, Last 12 w/e 04.10.25



THE UK'S #1 SUGAR WAFFLE BRAND*



FOR FURTHER
DETAILS PLEASE CONTACT US

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*Nielsen, Total Coverage, Last 12 Weeks W/E 04.10.25

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