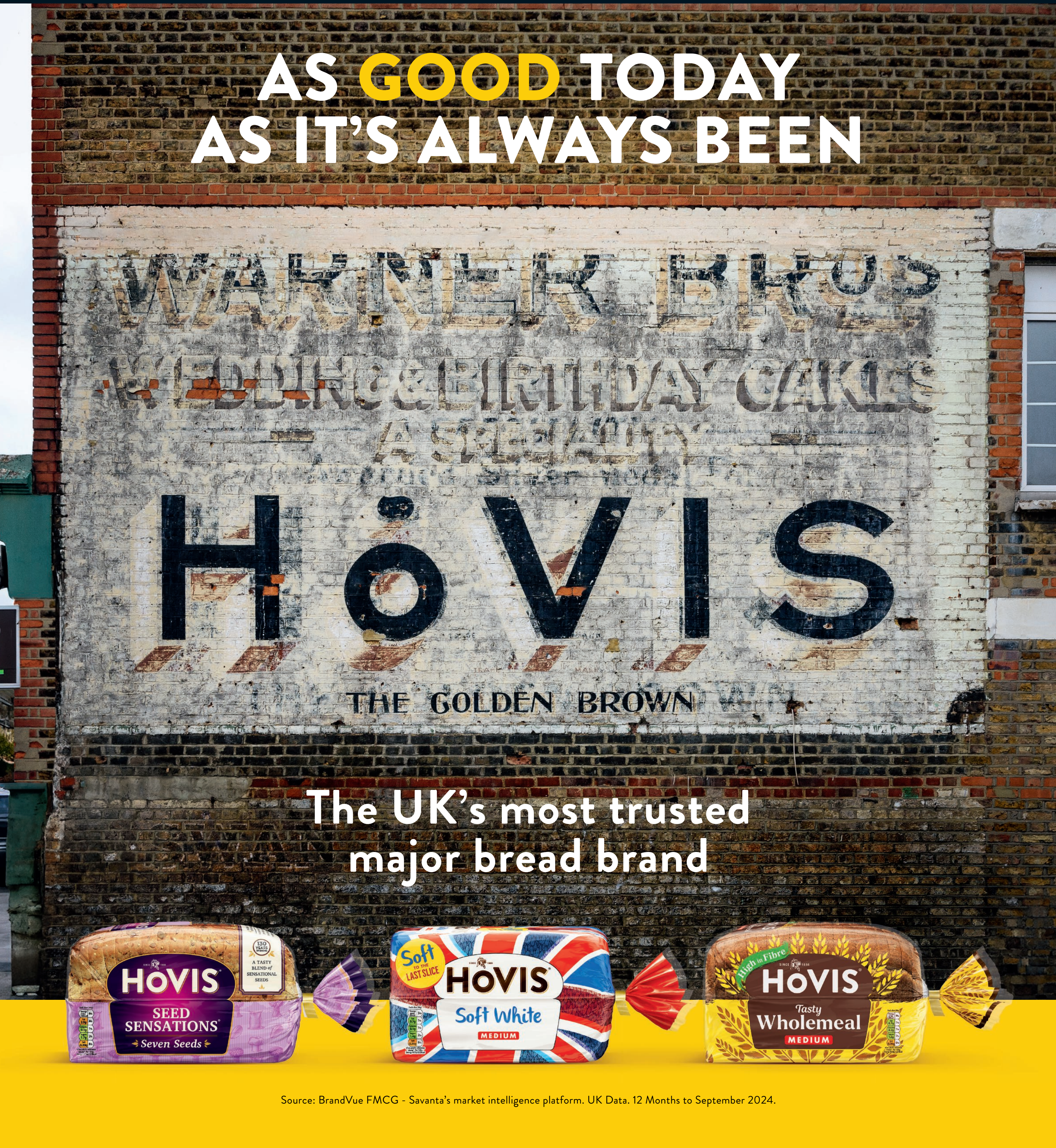
9 NOVEMBER 2024

The Grocer Guide to...

The Grocer

Bread & baked goods



Hovis

Consumer-focused innovation

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KEY BRANDS

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KEY INITIATIVES

Partnership with Netflix's That Christmas film

Morrisons & FareShare partnership

The needs of today's shoppers are constantly evolving, and Hovis has continued to support retailers with innovation based on consumer insight to help drive category growth, says CEO Jon Jenkins. "The cost-of-living crisis has placed continued pressure on household spending," he notes. "Over the past year, we've seen a consumer shift towards value-driven staples, particularly within the white bread segment. Although white bread continues to be popular, having the largest unit share of pre-packaged sliced bread at 56.3%[1], even in tough economic times shoppers still seek a wide range of quality bakery offerings.

"While consumers are looking at how they can make simple switches to save money, they still desire innovation. We've responded by developing new products that excite shoppers, bring some Hovis wholesome goodness[2] and drive sales. Hovis has recently grown market share from 18.4% to 18.7%[3] and is the only major bread brand to be No.1 or No.2 in every region of the UK[4]."

In September, Hovis launched its new Hovis Farmhouse Batch – "a deliciously distinctive white loaf designed to meet the growing shopper demand for even tastier, more premium but accessible alternatives to standard white sliced bread", says Jenkins.

"In the last year we built on our strength in bread with bits, with two new SKUs in our Seed Sensations range. Seed Sensations is the nation's No.1 bread with bits brand[5], and following extensive research, we launched Hovis Seed Sensations Sunflower & Pumpkin and Hovis Seed Sensations Malted Wholegrains, to give consumers even more reasons to re-discover the great taste of seeded bread."

> **"While consumers are looking at how they can make simple switches to save money, they still desire innovation. We've responded by developing new products that excite shoppers"**

Of course, launching great products is only half the battle, he adds. "We've supported these new additions with impactful marketing campaigns designed to resonate with our target consumers. Most recently we partnered with Netflix's new That Christmas film to create a festive family promotion featuring limited-edition packaging and a holiday giveaway, driving excitement and engagement around our Hovis Best of Both loaves.

"We're also incredibly proud of our recent partnership with Morrisons and FareShare[6], where we've donated a loaf of Hovis Best of Both for every loaf purchased using a Morrisons More Card or app during October. This initiative allows us to give back to those most in need across communities nationwide during these challenging times.

"Hovis has provided the nation with wholesome goodness[7] for over 100 years and this, coupled with our commitment to prioritising consumer needs at every stage of product development, solidifies our position as a reliable partner for UK retailers and the most trusted major bread brand among UK consumers[8]."

Source

1 NIQ Scantrack, total coverage, unit sales, MAT to 05/10/24
2+7 Our latest innovations provide a source of protein which contributes to the maintenance of muscle mass when eaten as part of a balanced diet and lifestyle.
3 NIQ Scantrack. Total coverage, value share. 4w/e 07/09/24 vs 4w/e 10/08/24
4 NIQ Scantrack. Unit Sales by Region. 52 Weeks to 05/10/24
5 NIQ Scantrack. Total coverage, unit sales, bread with bits excluding Private Label. MAT to 05/10/24
6 FareShare is a Registered Charity (No. 1100051)
8 Data from BrandVue FMCG – Savanta's market intelligence platform

Analysis

Contents

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As phase two of the cost-of-living crisis rumbles on, a focus on quality, innovation and an adaptability to react to the trends driving the market is helping bread and baked goods suppliers ride out the storm.

Cash-strapped market

Brand watchdog, Which, found 54% of consumers report they are now purchasing cheaper products than they would have prior to the cost-of-living crisis.[1] With staples, such as bread, being perceived to have risen in price more impactfully than luxury items such as chocolate and wine, over the last year.[2]

"Inflation has affected shoppers throughout the food and drink industry, as many seek cheaper alternatives to their favourites, as a way of cost saving. As a result, in-store bakeries have seen growth...with price being the main driver,[3]" says Hannah Sibley, product and innovation director, Aryzta.

Brands must therefore emphasise the value of their brand heritage and products to continue to capture consumer spend.

"The cost-of-living crisis has placed continued pressure on household spending, but bread continues to represent great value to consumers in terms of its fundamental proposition," continues Jon Jenkins, CEO, Hovis. "While we know that many consumers are looking at how they can make simple switches to save money, they are still looking to trusted and familiar bakery products that they know deliver on quality and taste – while meeting different needs and meal occasions."

Social media boom

'Cloud' breads, burn-away reveal cakes and chopped bagel sandwiches may not sound like they have much in common, but have been some of the most trending baked goods across social media in 2024, highlighting consumers openness to new concepts and flavour combinations. In fact, 82% of social users claim to engage in shopping-related activities when using a social and entertainment platform, with a third saying socials are their preferred channel for product discovery.[4]

"Shoppers are in their adventurous era," says Arytza's Sibley. "[They] are being more adventurous with flavours, inspired by recipes and cuisines being enjoyed out of home and on social media," she continues.

Social media platforms including

TikTok and Instagram are driving significant innovation across the sector as brands seek to jump on trending aesthetics and flavours. "TikTok has put a huge emphasis on the importance of visually appealing food, especially with baked goods," she says. In fact, 69% of UK consumers say they've purchased a product after seeing it featured on social media, emphasising the salience of the channel.[5]"

Social bakery trends are driven both organically through user-generated content and bolstered by brand collaborations and sponsorships. "We find influencers a great way to enhance Jacksons' visibility, creating positive and fun brand associations," says Jacksons' Wright.

The brand's use of social channels aims to "entice shoppers to purchase, whilst building a strong and authentic connection" to target audiences, she adds. Jacksons reported a 12% increase in followers on Instagram, attributed to its brand collaboration with Bon Maman in October 2024.

For global brands, social media "makes the world so much smaller," says St Pierre Groupe's Wells, helping the brand cater to different markets at different stages through its global NPD pipeline. "Social listening has always played a part in what we do as a consumer-first brand. It's important to understand consumer attitudes and so many food trends emerge across social media now," she says. Social media isn't new for the brand, but continues to play an increasing role in product testing and development, she explains "social media also offers a brilliant testing ground and engaged consumer panel, so whilst it's arguably more important than ever before, it has always been an area of focus for St Pierre."

Speculoos, also known as Biscoff, is another key trend coming through from European influences that has won out through social media, says Simon Atkins, advisor on the baked goods category for the EU's 'More Than Only Food & Drink' campaign. "With its origins in Belgium, speculoos is a flavour blend of cinnamon, ginger, cardamom, cloves and nutmeg which is most typically made into a traditional Belgian biscuit. It was traditionally eaten at Christmas time, but the flavour trend has exploded over recent years," he explains. "Speculoos is now found throughout the baked goods sector and its popularity has been particularly driven by younger consumers via TikTok which has turned the company behind the Biscoff brand from a traditional and relatively unknown business, into a young and interesting brand," he adds.

Playing on nostalgia and tradition

"Despite more variety in the bakery aisles than ever before, good old bread continues to perform incredibly well," says Warburtons' Bebbington.

Nostalgic breads and baked goods, and their re-imagined counterparts, have seen a boost this year, as consumers prioritise comforting flavours and formats, gravitating to safe bets that guarantee quality and value.

But tradition doesn't mean standing still, adds Hovis' Jenkins. "As it stands, there are 29.6m loaves of pre-packaged bread purchased every week.[6] Although white bread continues to be popular among consumers, having the largest unit share of pre-packaged sliced bread at 56.3%,[7] even in tough economic times shoppers are still seeking a wide range of quality bakery offerings." Hovis launched its Farmhouse Batch in September 2024 offering a more premium white loaf at an accessible price point, supporting retailers to "add value to the category by stocking a variety of different products".

Health is another factor driving this push for more nostalgic, classic lines. "As people become more switched on to the concept of ultra-processed food, we are seeing a rise in UK demand for European-style sourdough and rye breads," explains EU's Atkins. "There is an increased appreciation for traditional methods of bread-making, as well as a greater awareness for the ingredients that are being used," he adds.

"Whilst varieties vary across regions, based on local grains and fermentation

Opportunities ahead

Bread and baked goods are being consumed across an increasing breadth of meal occasions, marking good news for brands in the category.

"Meals for tonight is the biggest shopping mission outside of treats,[8] with 21% of trips dedicated to this,[9]" says Helena Wright, marketing and NPD director, Jacksons of Yorkshire. "This is an opportunity area that we believe bread can play a bigger part in the category in, alongside the typical breakfast and lunch occasions."

Considering treats, "the bakery occasions category, which includes pittas, bagels and crumpets has grown volume 1.8% in the last year, 50% faster than total store sales[10], as consumers continue to look for more variety at mealtimes," says Warburtons commercial director Colin Bebbington.

"The bakery occasions category has grown in-home breakfast occasions by over 10%,[11]" he adds "as consumers move away from cereals in search of more exciting and versatile breakfast options."

"Spend in bakery is growing fastest amongst younger shoppers and those with families" says Rachel Wells, commercial director, St Pierre Groupe.

Snacking is another occasion driving growth. Arytza's Sibley notes that "inclusion breads are seeing popularity across the in-store bakery sector," primarily as a snacking alternative, with "breads that typically include things like seeds, fruits or flavourings" proving key ranges.

With up to 63% of consumers willing to make an impulse purchase for products containing innovative flavours,[12] brands have prioritised exciting NPD to capture consumer attention and encourage product trial.

"We're seeing consumers switching from traditional bakery to more innovative and inspirational meal occasions, which is losing space on shelf for sliced bread," says St Pierre Groupe's Wells.

Popular trending products include 'breads with bits' - inclusion ingredients such as dates, honey, cranberries and walnuts, Nordic-style seeded breads flavoured with ingredients like fennel, aniseed caraway seeds, orange zest and anise, and products prioritising protein.

times, at the heart of sourdough is centuries old breadmaking traditions which people in the UK have really embraced."

Function over fancy

And the health trend extends beyond traditional baking methods and formulations.

"Bread and bakery are inherently part of a healthy balanced diet and is a great way to get essential vitamins and nutrients such as fibre into the diet," explains Warburtons' Bebbington. "We have continued to see growth in products that are catering for those looking for additional health benefits, or to satisfy a dietary need – such as our Protein and Gluten Free ranges."

Gut health is another core driver of shopper purchase decisions today. Exciting NPD catering to these consumers currently on the market include "products that contain the core 'power ingredients' such as grains and seeds, sours, fibres, wholegrains, raw cocoa, fresh and dried fruits, botanicals and biotics," says EU's Atkins.

Meanwhile, Hovis and Modern Baker have worked together in an exclusive brand licensing agreement since April 2023 to develop its 'gut-health loaf', designed to also appeal to these health-conscious consumers.

When it comes to the prioritisation of NPD, bread and baked goods suppliers are working to keep consumer health top of mind throughout their decision making.

Hovis' Jenkins explains: "While bread is not one of the categories currently in scope of the HFSS legislation, the majority of our bread loves are low in fat, low in sugar as well as being a source of protein. Despite the important functional role that salt plays as an ingredient in the bread-making process, for the past 20 years we have actively reduced the levels of salt in our products, on average by 30% per 100g."

Future Focus

As commented by St Pierre Groupe's Wells "The future is bright for bakery." The outlook from suppliers to the category is predominantly optimistic looking to 2025. "At a total grocery level, brands are outgrowing own label for the first time in two years,[13] with his being even more exaggerated in the bread category," says Warburtons' Bebbington.

"We absolutely expect the market to grow overall again this year and continue to do so faster than grocery as it has the last few years," he says. "There is real opportunity in bakery, to further place itself at the heart of mealtimes by offering more choice." The priority for suppliers and retailers alike must be to continue "to excite consumers in store and inspire them at shelf," he adds.

While shoppers will still feel the price pinch, Hovis' Jenkins is optimistic for growth in the sector to come,

Analysis

specifically around meal occasions. "We anticipate continued packed lunch growth in 2025, driven by cost-of-living pressures, with sandwiches remaining a top choice and 77% of workers opting for packed lunches.[14]

"We also see a continuation of the trend for more premium products, evidenced by consistent year on year growth in 'bread with bits'."

In addition, Jacksons' Wright adds that the premiumisation trend is also set to stay, with growth anticipated in Tiger (19%)[15] and Sourdough (46%)[16] as well as targeted meal occasions. "Meal occasions are a key area of focus and demonstrate that there's more to the plant bread category than square bread at breakfast and lunch, and that there's more to the trade-up end of the market than just sourdough."

At home treat occasions also remain on the rise, according to St Pierre Groupe's Wells. "The demand for replicating out of home treats at home still shows no sign of slowing and that's driving a lot of subsector growth in bakery. In fact, 'continental' bakery items have been in the top 3 fastest growing categories since 2019."

Health is also set to drive significant trends in the market, both in the UK and across Europe. "Focus will remain on quality; safe and sustainably produced products and we will see further expansion of positive health ranges," adds EU's Atkins. "There will also be a focus on affordability and ensuring that access to high quality and nutritional products is available to all."

As Arytza's Sibley explains, "the overall food and drinks market is expected to become more nutrient-dense next year, as consumers are taking their diets more seriously, using them as a much-needed tool to improve their short- and long-term health. In store bakeries need to ensure they have a range to suit these shoppers, in order to remain a key destination."

Supporting Sibley's comment, Atkins concurs "for the health-conscious demographic, the bread that they choose to purchase will become an integral part of their health and wellness regime."

Suppliers are of course under no illusion that there won't be challenges on the horizon. Controlling costs will be essential to maintaining margins and keeping price points affordable for

consumers, explains Sibley, as will be managing waste levels with products that typically have a shorter shelf life than other foods. "Inflation is still impacting consumer confidence, so shoppers will continue to be mindful of spend, shopping around for lower cost alternatives where possible."

"Challenges still sit around the cost of wheat and flour, in part due to climate change which is impacting the level of harvest across the northern hemisphere," explains EU's Atkins. "There are also lots of issues around ingredient supply due to the continued confrontation in Ukraine which is putting massive strain on wheat supply from that part of the world, which used to supply about a third of the world's wheat."

Sustainability is another crucial issue that will continue to affect the sector. While Jacksons is committed to 100% recyclable packaging, Hovis has removed "500 tonnes of plastic" through downgauging the packaging they use. EU's Atkins concludes, "Consumers are more conscious of the sustainability of their food and whether it is grown in an environmentally positive way. Across the EU we are seeing examples of regenerative farming where the soil is disturbed as little as possible, and companion plants are planted to put nitrogen into the soil. Interest in these positive farming practices will increase as shoppers demand greater traceability of ingredients."

Farming practices are of increasing significance for shoppers, but price can remain a barrier for many. Atkins explains "Another area that is being driven forward by Europe is organic farming practices, which is set to grow significantly over the coming years. Organic bread, flour and ingredients are growing at pace, from a relatively small base because of the higher price point, but as demand grows the price will come down."

Sources

[1] Which Consumer Insights Tracker, August '23
[2] Food Navigator, Food & Beverage trends, April '24
[3] Aryzta Asks June 2024
[4+5] Retail Economics and TikTok: The Power of Social Commerce Report, Jun '24
[6+7] NIQ Scantrack, total coverage, unit sales, 52w to 05/10/24
[8+9] Nielsen Mid-Year update '24
[10] NielsenIQ RMS, Grocery Multiples, Unit Sales, 52 w/e 07.09.24
[11] Kantar Worldpanel, 2024 Trends in Food & Beverage Consumption Report
[12] Innova Market Insights survey, '22
[13] NielsenIQ CPS, Total GB, FMCG, 12 w/e 07.09.24
[14] Mintel's 'Attitudes to Lunch Out of Home' 2023 report
[15+16] Nielsen 52 weeks to Sept '24

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Aryzta

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KEY PRODUCTS

Authentic sourdough bread
French breads
Viennoiserie
Sweet bakery

In-store bakery can be the 'bread and butter' of your profits, if the correct range is available to suit shopper needs. Amid inflation affecting spending, shoppers have realised they can purchase high-quality breads alongside their standard shop, saving time and money in the process.

"Sourdough is fast becoming the star attraction of any in-store bakery range due to its adaptability across mealtimes and its limited ingredients," says Hannah Sibley, product and innovation director at Aryzta.

The narrative around ultra-processed foods calls for products to include fewer ingredients, and drives demand for breads like sourdough, which already has a 'healthier for you' image, with 58% of UK consumers saying it is healthier than regular white bread[1]. Sourdough breads are also naturally high in fibre and have lower gluten content than other breads, appealing to shoppers looking to improve their gut health.

"Freshness is another important factor," adds Sibley. "Shoppers also want to purchase breads with a longer life and less wastage. Sourdough, with its natural preservatives, provides a great solution.

"The way freshness is often defined is via shoppers' senses. With our breads being baked daily in-store, this allows us to bake for a little longer, which provides that freshly baked smell in-store and delivers a slightly darker appearance that attracts consumers.

"Speciality loaves, which includes sourdough, are leading the way for value and unit growth compared to others such as traditional loaves, rolls and French breads."

"Our 33-year-old starter is the key ingredient to the texture, taste and flavour of Aryzta sourdough breads," says Sibley. "It is used and regenerated daily to create the unique and distinctive experience of our premium sourdough. The combination of long fermentation and resting times, means we produce authentic sourdough at scale. Aryzta customers benefit from traditional baking methods and the precise standardisation of modern manufacturing.

"Speciality loaves, which includes sourdough, are leading the way for value and unit growth compared to others such as traditional loaves, rolls and French breads"

"We are the masters of sourdough, but French bread is also a significant part of our portfolio. It's another all-rounder – breakfast, sandwiches, with soup – it's a multi-use product giving it a universal appeal," she concludes.

Power of social media

The continued rise in visual social media platforms such as TikTok and Instagram is significantly impacting the bakery market. These platforms emphasise the importance of visually appealing food, leading consumers to demand more than just traditional breads for their meals. So, there's a real opportunity for retailers to drive engagement in the category through inspiration at all touchpoints – not just with eye-catching POS at the bakery fixture in-store or online, but also through social media. This can give extra visibility to new products and drive sales of existing products, increasing basket spend and growth.

Source
[1] Aryzta Asks survey with 1,009 UK consumers, August 2023


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European Commission

How the EU shapes UK trends

DETAILS

For more information on the EU's 'More Than Only Food and Drink' campaign, visit https://enjoy-its-from-europe.campaign.europa.eu/united-kingdom/en

KEY CONTACTS

Simon Atkins
Advisor, 'More Than Only Food & Drink'

Simon Atkins, advisor for the EU's 'More Than Only Food & Drink' campaign, explains how Europe's influence is shaping the UK bread and baked goods sector.

"The EU/UK bakery market is worth \$88bn[1], and the UK is the biggest importer of bakery goods across the continent of Europe. Of all the imports into the UK from Europe, about 74% of that is breads of some description[2].

In total the UK imports about \$388m-worth of bread per month[3].

The rise of artisan and traditional European breads

"One of the most prominent ways the EU is shaping new bread trends in the UK is through the increasing popularity of artisan breads such as Italian ciabatta, German rye, Danish rye (rugbrød) and sourdough, which is deeply rooted in European bread-making traditions. Countries across the EU have long used natural fermentation processes to create complex, tangy flavours in sourdough loaves.

"These breads are perceived as higher quality due to their use of natural fermentation processes, longer fermentation times, and more complex flavours compared to mass-produced loaves. With health-conscious consumers looking to improve the quality of bread in their diet, the popularity of this style of bread will only increase.

Organic and speciality grains: a pan-European trend

"Organic bread and the use of speciality grains are also gaining momentum. The EU has been a major force behind the organic food movement, and its innovative farming practices and strict regulations for organic certification have created a high demand in the UK.

> **"The EU's focus on health, sustainability, and transparency in food production mirrors the demands of UK shoppers and will continue to influence the UK market"**

"Breads made with spelt, rye, einkorn, and other ancient grains, which are considered by consumers as healthier and more sustainable than standard wheat, are rising in popularity, as they provide a nutritional boost and align with the growing demand for whole foods.

"Additionally, the Protected Designation of Origin and Protected Geographical Indication systems, established by the EU, ensure that specific types of bread are produced using traditional methods in their regions of origin. This has sparked interest in the UK for similar speciality breads, with consumers seeking out authentic European flavours.

Health and sustainability: a shared EU-UK priority

"The EU's focus on health, sustainability, and transparency in food production mirrors the demands of UK shoppers and will continue to influence the UK market. With the EU's regulations requiring clearer labelling and stricter ingredient standards, the continent can provide unbeatable quality, authenticity and innovation in the bread and baked goods sector."

Source
[1-3] IndexBox, Europe – Bread and Bakery Products – Market Analysis, Forecast, Size, Trends and Insights, October 2024


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Jacksons of Yorkshire

Tiger Bloomer earns its stripes

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KEY BRANDS

Jacksons of Yorkshire
– Soft White Bloomer
– Tiger Bloomer
– Multiseed Bloomer
– Super Seeded Bloomer
– Multigrain Bloomer
– Blend of Both Bloomer

Jacksons is the fastest-growing brand in the plant bread category[1] with huge ambitions to build on that growth with its core range of bloomers, alongside some exciting NPD, as it looks to establish itself as one of the leading added-value brands in the market, reveals Helena Wright, marketing and NPD director.

"To continue on our growth path, engaging with shoppers is key, so over the last year we've attended consumer shows and events, spent more than ever on shopper media, implemented loyalty driving activations and launched on-pack promotions, as well as 'always on' social media engagement," Wright says. "Over the coming year we are putting significant investment into the brand to drive awareness and trial across the portfolio."

Tiger bread is a key growth area in the category and is up 19% in cash year-on-year[2], notes Jacksons. "Without it, white bread would be in decline by -1.7% vs the flat position it is currently in[3]," it says. "Jacksons saw an opportunity and invested heavily in our state-of-the-art capabilities, launching Jacksons Tiger Bloomer in February 2024. This all leans into the trend of shoppers wanting affordable everyday treats, on which a fresh, crusty, white Tiger loaf delivers, at a price that is accessible.

"We are immensely proud of our product, with consumer taste panels ranking Jacksons Tiger Bloomer as No.1 in taste, appearance, flavour, aroma and texture, compared to the market leaders in both brand and own label[4]."

Jacksons Tiger Bloomer has seen some great success over the last six months

> **"Jacksons Tiger Bloomer has seen some great success over the last six months, with nationwide launches in Tesco, Waitrose and Ocado – all delivering against our expectations"**

with nationwide launches into Tesco, Waitrose and Ocado – all delivering against our expectations, she adds. "We saw a 20% uplift since the packaging refresh in September and the Tiger Bloomer is already a key product within our range," Wright says. "There are more exciting launches still to come, as we look to carve our position as an affordable premium brand, with an NPD pipeline focusing on a variety of different areas.

"Overall, we want to grow awareness of our range, so more people can enjoy the quality our products offer. Alongside our investment in communications and NPD, boosting our awareness at the fixture is just as important to us. As part of this, our range is having an exciting packaging refresh which will start to land on shelves during December 2024. The new design leans on our proud Yorkshire heritage with distinctive brand assets, supported with a premium print finish reinforcing quality, as well as a clear variant communication. Together, this showcases our bakery quality, family-owned, and trustworthy brand positioning."

Source
1-3 Nielsen, 52 w/e Sept '24
4 WSS Product Testing April 2024

ESTABLISHED 1851

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St Pierre

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St Pierre
– Brioche Burger Buns
– Seeded Brioche
– Burger Buns
– Brioche Hot Dog Rolls
– Sliced Brioche Loaf
– All Butter Croissants

St Pierre is closing the year with a host of new accolades: the fastest-growing bakery brand in the top 15, in rolls, in breakfast, in lunch and evening meals. Its growth of 45% in value and volume is difficult to miss.[1]

This year the company launched its first-ever 'above the line' campaign, putting the brand front-of-mind across TV screens, in-store activations, PR, social and digital media, urging UK shoppers to 'Eat Avec Respect'.

"The creative campaign signalled a change in direction," comments Rachel Wells, commercial director, St Pierre Groupe, "combining the assuredness and confidence of stereotypical French attitude with the standout humour and playfulness of our growing premium brand. The creative platform perfectly blends the French flair and challenger spirit for which St Pierre is known.

"What we love about 'Eat Avec Respect' is the flexibility it allows to explore new tactics when it comes to in-store activity.

"We achieved so many 'firsts' this year, from swing gates to in-store goalposts and pallet wraps to cross-merchandising fixtures. The campaign has come to life across convenience, wholesale depots and major multiple grocery stores with fantastic impact and it's a credit to the team delivering a masterclass in in-store marketing.

"Our investment in Eat Avec Respect demonstrates to our customers that we are maximising the shelf space we've worked hard to secure. It reaffirms that we are driving sales for the sector – with St Pierre shoppers spending more per trip in bakery and attracting higher value shoppers to the category as a result.[2]"

Premium product innovation

The brand also maintained a steady stream of product innovation, launching a premium offering of All Butter Croissants in Q3 with Morrisons and securing listings with Morrisons and Asda for the return of its seasonal Chocolate Brioche Wreath.

Wells continues: "St Pierre is delivering growth for the category across all subsectors. In rolls, St Pierre is responsible for 60% of the value growth and is the second-biggest brand, with 5 SKUs in the top 10 branded products in the market.[3] In breakfast, St Pierre is delivering more value growth than any other brand in the top 10.[4] Performance in the UK is exemplary and has been delivered despite cost-conscious shoppers, because the quality of our products wins out.[5]

"As a brand, we are delivering 14% of the value growth in total bakery, growing 15 times faster than the total category.[6] The continued success of the St Pierre brand has earned St Pierre Groupe a spot as the third-biggest bakery supplier in the UK – an incredible achievement and a title we hope to maintain as we continue into 2025.[7]"

"We are driving sales for the sector – with St Pierre shoppers spending more per trip in bakery and attracting higher value shoppers"

Source
[1] IRI Circana, Total Grocery Outlets L52 weeks to 05.10.24
[2] Kantar panel data to end of April 2024
[3-5] IRI Circana, Bakery, Total Grocery Outlets, L52 weeks to 05.10.24
[6-7] IRI Unify UK L12 weeks, Bread and Bakery Occasions to 07.09.24

ST.PIERRE
FOR FRANCE'S SAKE, YOU CAN'T MISS THE UK'S FASTEST GROWING BAKERY BRAND!*
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• DELIVERING 14% OF TOTAL BAKERY VALUE GROWTH***
CAN YOU AFFORD NOT TO STOCK ST PIERRE?
EAT AVEC RESPECT
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6 BRIOCHE BUNS
Rich & soft with a beautifully buttery taste
PRE-SLICED
ST.PIERRE
4 SEEDED BRIOCHE BURGER BUNS
PRE-SLICED
*Fastest growing bakery brand in the top 15, IRI Circana, Total Grocery Outlets L52 weeks to 5th October 2024 **St Pierre is part of St Pierre Groupe; IRI Unify UK L12 weeks, Bread and Bakery Occasions to 7th September 2024
***IRI Circana, Total Grocery Outlets L52 weeks to 5th October 2024

United Food Brands

Driving bakery and beyond

DETAILS

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KEY BRANDS

Waffle Amour
– Sugar Waffles
– Chocolate Waffles
– Toasting Waffles
– Chocolate and Hazelnut Waffles
Kuchenmeister
– Marzipan Loaf
– Marzipan Bites
– Marzipan Cookies
The Flan Co
– Large Sponge Flan Base
Mars Croissants
MilkyWay Croissants
Oreo Chilled Fresh Milk Snack

United Food Brands (UFB) has solidified its position across multiple food categories, with a significant focus on bakery, snacking, and chilled fresh products. In bakery, UFB is particularly strong in the morning goods sub-category, boasting a 36% branded market share in waffles[1], anchored by its flagship brand, Waffle Amour – currently the UK's No. 1 Belgian waffle brand[2]. In addition to its own brands, UFB holds exclusive UK distribution rights for Mars and MilkyWay-filled croissants, as well as the globally renowned Kuchenmeister Stollen, alongside a strong portfolio of retailer own-label products.

Expanding the waffle portfolio

This year has seen significant wins for UFB's bakery team, including the launch of key product innovations in major grocery retailers, reveals MD Richard Reeves. "The company expanded its Waffle Amour and Waffle Patisserie brands with new product formats, reflecting its commitment to driving category growth," he says.

"We were delighted to achieve full distribution of our chocolate-filled and large waffle formats at Sainsbury's, alongside the introduction of our mini waffle range in Asda, Our year-on-year distribution for waffles has grown by 41%[3], with our market share in branded sugar waffles rising from 76% to 88%[4]. These achievements underscore our dominance in the waffle sub-category."

> **"This year has seen significant wins for United Food Brands' bakery team, including the launch of key product innovations in major grocery retailers"**

Croissant collaborations

While waffles remain at the core, UFB continues to diversify. A major highlight of 2024 has been the launch of its licensed Mars and MilkyWay-filled croissants, which hit the shelves in Q2 and are now available in over 4,000 retail stores nationwide, adds Reeves. "The response to our croissant range has exceeded expectations," he says. "We're thrilled to be listed with Asda, Morrisons, Iceland, Ocado, and several discounters, with more exciting news on the horizon for next year."

What's next for waffles?

Looking ahead, the company is focused on elevating the waffle category by introducing a premium tier. "As the market matures, consumers are seeking clearer distinctions between product ranges," Reeves explains. "We're working with key retail partners to establish a 'good, better, best' hierarchy, helping shoppers differentiate between offerings and discover new, premium waffle experiences. Our upcoming ranges will give consumers the chance to enjoy restaurant-quality waffles from the comfort of their homes."

The company has ambitious plans for 2025, with Waffle Amour set to make its much-anticipated move into the food-to-go (F2G) category in Q2. Reeves says: "We've listened to consumer feedback and see a significant opportunity for sweet bakery items within F2G and the wider meal deal segment."

Source

[1,2] Nielsen, Total Category, Total Brands, GB Grocery Mults, 4 w/e 27.07.24
[3] UFB internal data
[4] Nielsen, Total Category, Total brands, GB Grocery Mults, 4 w/e 27.07.24, plus Total Category, Total Brands, GB Grocery Mults, 4 w/e 27.01.24


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Waffle AMOUR
With love...From Belgium
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5 Sugar Waffles
Waffle AMOUR
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8 CHOCOLATE &
HAZELNUT FLAVOUR WAFFLES
4x2 Twin Wrapped for Freshness
Waffle AMOUR
Made with Love
8 BELGIAN STYLE
TOASTING WAFFLES
4x2 Twin Wrapped for Freshness
Nielsen, Total Category, Total Brands, GB Grocery Mults, 4 w/e 27.07.24

Warburtons

Powering up with protein

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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

At a total grocery level, brands are outgrowing own label for the first time in two years[1] and this is even more exaggerated in the bread category. Warburtons, Britain's largest bakery brand, continues to perform ahead of the market, seeing strong performance from classic products such as 800g Toastie, Farmhouse and Wholemeal, as consumers look for variety and quality in bakery.

However, while bread remains a firm family favourite, with over 99% of households still buying over 30m loaves of wrapped, sliced bread each week[2], it is bakery occasions that are driving the long-term growth of the category. Sales of bakery occasions products, such as pittas, bagels and crumpets, now outweigh sales of wrapped bread[3].

But not only are consumers after variety, they continue to look for products that offer them additional health benefits, such as fibre, or calcium, Vitamin D and, in particular, protein. One in three shoppers are interested in the protein content of bakery products[4], so innovating to meet this need with products that are versatile for all mealtimes is a top priority for Warburtons.

Protein range extension

In September 2024, Warburtons extended its protein range to include Protein Flatbreads, and Protein Pittas – both with 8g of protein per serving – giving consumers exciting new meal options, with high protein, that of course taste great too.

In addition, volume sales of its Protein Thin Bagels continue to boom, and it is now the biggest-selling Thin Bagel on the market, overtaking Original, with sales up 33%[5] (latest 12 weeks vs last year). In January, the brand also launched Protein Power and, from a standing start, is already selling over 1m units[6].

> **"Getting protein into the diet doesn't need to be difficult, or mean you need to compromise on taste"**

Bringing excitement to mealtimes

Colin Bebbington, commercial director at Warburtons, says: "It's so important to ensure we continue to innovate, to inspire consumers and bring excitement to their mealtimes. And if those new products are not only more interesting, but can also satisfy a health need, like additional protein – and taste really good – we've really hit the sweet spot for the consumer."

In fact, new research by Warburtons reveals that almost one in four Brits say they don't enjoy their meals because they prioritise 'goodness' over taste[7], with 45% finding getting protein in the diet confusing as there are too many different health claims (38%)[8].

"Getting protein into the diet doesn't need to be difficult, or mean you need to compromise on taste," continues Bebbington. "Our range of Protein products give consumers an easy way to get additional protein into the diet, without the faff, and while still enjoying what you're eating!"

Source

[1] NielsenIQ CPS, Total GB, FMCG, 12 w/e 07.09.24
[2+3] NielsenIQ RMS, Grocery Multiples, Unit Sales, 52 w/e 07.09.24
[4] Waitrose Food and Drink Report 2023/24
[5] NielsenIQ RMS, Grocery Multiples, Unit Sales, 12 w/e 07.09.24
[6] NielsenIQ RMS, Grocery Multiples, Unit Sales, 52 w/e 07.09.24
[7+8] Research commissioned by Warburtons through OnePoll to survey 2,000 UK between 8th to 15th July 2024

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*NielsenIQ Scantrack, Total Coverage, Unit Sales, 12WE 05.10.2024

Warburtons

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