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**The Grocer Guide to...**

**The  
Grocer**

# Breakfast & brunch



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Analysis

# Dawning realisation

The potential of breakfast as a lucrative opportunity for brands to shine is being realised as recognition of its importance as a meal occasion grows



▶ Pancake tacos with syrup salsa, anyone? Or how about a bowl of pancake cereal or even pancake spaghetti for your breakfast? Yes, these are all options suggested on website brunchintheuk.com<sup>1</sup> and, let's face it, their ingenuity with the humble pancake apparently knows no bounds.

Yet, however you define it, there is no doubt that the breakfast & brunch occasion is evolving at speed, with ever more inventive recipes coming to light. In the out-of-home (OOH) food market, a recent report by Kantar<sup>2</sup> reveals that "breakfast is the fastest-growing occasion" surging by 13.7% compared to lunch (+3.2%), where growth is slowing, and dinner (+5.7%) – and the breakfast market is shifting, it says.

"Coffee shops – once a dominant force in the morning rush – have fallen out of

the top three breakfast destinations as consumers increasingly turn to quick service restaurants (QSRs) and multiple grocers."

Further, the report notes that while midlife consumers (aged 35-54) are the most engaged with breakfast out of home, it's the Gen Z group that's the fastest-growing (+23.7%) year-on-year. And it adds: "As younger consumers develop new breakfast habits, brands that deliver affordability, portability, and digital convenience will be best placed to capture their spend."

Rachel Wells, commercial director at St Pierre, emphasises the importance of breakfast, saying: "Nine out of 10 consumers eat breakfast every day<sup>3</sup>, making it the UK's largest meal occasion, with bakery items bought by 99.9% of the population, twice a week<sup>4</sup>.

**+13.7%**

Growth in the breakfast occasion, compared to lunch (+3.2%) and dinner (+5.7%)<sup>2</sup>

**£1.1bn**

Value of breakfast within bakery occasions<sup>5</sup>

**+6%**

Year-on-year increase in on-the-go missions within healthier<sup>13</sup> biscuits<sup>12</sup>

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Breakfast is the largest sector within bakery occasions, worth £1.1bn and growing at 4% year on year (YoY)<sup>5</sup>.”

Croissants are one of the fastest-growing breakfast bakery segments, currently worth £140m and delivering the most value growth, up 17% YoY<sup>6</sup>, she adds. “So St Pierre’s latest NPD is a two-pack of All Butter Croissants, with 30% French-churned butter, as well as a larger serving size for indulgent breakfasts at home<sup>7</sup>.”

Tony Owen, general manager of hot food-to-go specialist Rollover, agrees that the company has seen continued growth in the breakfast category, with consumers increasingly looking for convenient, high-quality options that fit their busy lifestyles. “At Rollover, we’ve performed strongly within this sector, continuing to focus on providing handheld breakfast solutions,” he says. “Our Breakfast Sausage Baguette and Sausage & Cheese Muffin not only cater to the breakfast rush but can be enjoyed at any time of the day.”

Convenience is clearly a driving force in consumers’ current breakfast choices, but the growing interest in health also plays strongly in the equation. Consumers are more aware than ever of the link between diet and wellbeing, with 68% of UK shoppers actively seeking healthier food choices<sup>8</sup>, says Linwoods Health Foods MD Patrick Woods. “This demand is driving interest in foods rich in fibre, vitamins and minerals, particularly at breakfast, where health is often a top priority<sup>9</sup>,” he says. “Additionally, the rise in plant-based eating – whether fully vegan, vegetarian or flexitarian – has boosted interest in nutritious plant-derived ingredients<sup>10</sup>.”

“While not everyone is adopting a fully plant-based diet, many are striving to consume a diverse range of 30+ plant-based foods per week to support gut health and reduce the risk of chronic diseases<sup>11</sup>,” he adds. “Linwoods cold-milled flaxseed range aligns perfectly with these trends offering a simple way to enhance nutrition in everyday breakfasts.”

Woods also notes that Linwoods has seen its turnover increase by over 20% in the past year, reflecting this wider shift towards health-conscious eating. “Despite economic challenges, health remains a key consumer focus, and we continue to innovate in response to this growing demand, ensuring our



products deliver both convenience and nutritional benefits,” he notes.

### The convenience factor

That health focus extends into the snacking aspect of breakfast, as Susan Nash, trade communications manager at Mondelez International, points out. “We’ve seen a 6%<sup>12</sup> year-on-year increase in on-the-go missions within healthier<sup>13</sup> biscuits, with shoppers increasingly looking for healthier snacks while out and about,” she says. “We anticipate that breakfast and brunch options that can be taken out-of-home for easy and convenient

on-the-go consumption will continue to grow this year – and any retail range needs to meet all potential need states and occasions, while also delivering on taste.”

Convenience is paramount in the breakfast space right now, says Rollover’s Owen. “As more consumers choose quick and easy meal options, retailers are shifting their focus towards providing products that cater to this need,” he says. “Convenience isn’t just about speed – it’s about offering products that are portable, require minimal preparation and can seamlessly fit into people’s busy lives. At Rollover, we understand the importance of convenience for today’s consumers. We offer a range of products that are quick to grab and easy to enjoy on-the-go.”

Convenience continues to be a major driver in the breakfast and brunch market, with retailers actively responding to consumer demands

“Breakfast and brunch options that can be taken out-of-home for easy on-the-go consumption will continue to grow this year”



## Opportunity and strategy

Retailers are recognising the potential of the breakfast and brunch market, investing in merchandising strategies and cross-category initiatives to enhance consumer engagement, says Linwoods' Woods. "Successful collaborations have already demonstrated the power of dedicated breakfast merchandising," he says. "In [Ireland's] Dunnes Stores, the introduction of a 'Healthy Breakfast Bay' significantly boosted sales, allowing shoppers to discover complementary products in one place. Similarly, Tesco NI's 'Love Local' campaign spotlighted Northern

Irish breakfast brands, increasing their in-store visibility and driving sales.

"Such initiatives highlight the effectiveness of strategic in-store placement and promotional campaigns in encouraging consumers to make healthier breakfast choices," he adds. "As retailers continue to innovate in this space, we see significant potential for further collaborations to elevate the breakfast category and make nutritious options more accessible.

Rollover's Owen believes retailers have become much more focused on the breakfast and brunch category. "Over

the last year, we've seen more targeted merchandising, greater visibility for breakfast products, and an increase in cross-category promotions that encourage customers to think of breakfast as a more complete, diverse meal. For example, we've worked closely with retailers to bundle our Breakfast Muffin and Sausage Baguette as part of their breakfast meal deal. It's about creating a more cohesive breakfast offering that aligns with current consumer preferences."

At St Pierre, Wells says retailers can increase customer loyalty and breakfast sub-sector spend by

using its brand to target their breakfast bakery offer to younger shoppers and those with families, whose spend in bakery is growing fastest. "Despite continuing economic pressures, shoppers are still looking to treat themselves well for breakfast – whether at home or on-the-go, making premiumisation and healthy indulgence two significant trends. Furthermore, private label is in decline, as shoppers are coming back to brands."

The hybrid working trend means that, on some days, out-of-home breakfasts are an important part of the working day for millions of consumers, she adds.

for quick nutritious options, says Linwoods' Woods. "Life is fast-paced and, with limited time in the mornings, many people still want a healthy, balanced start to the day," he says. "Since 2022, there has been a surge in convenient breakfast options, such as resealable pouches, single-serve cups, and grab-and-go meals. Brands like Pip & Nut, Nomadic and Fuel 10K have successfully tapped into this trend, showing how innovation can make healthy breakfasts more accessible.

"At Linwoods, we recognise that convenience is not just a passing trend, but a long-term shift in consumer behaviour. That's why we developed our Overnight Oats range, now available in Tesco, Sainsbury's, Ocado and Morrisons."

Woods also points to an increased retailer focus on breakfast convenience in-store. "Some supermarkets, particularly in Ireland, have introduced dedicated 'breakfast zones', grouping

key morning meal components like almond milk, herbal teas, seed toppers, and granolas in one place," he says. "Others have trialled breakfast foodservice solutions, such as overnight oats and granola pots, in grab-and-go fridges, further demonstrating the growing demand for nutritious, time-saving options."

### Balancing health and indulgence

While health is at the forefront of shopper choices, particularly since the recent pandemic, there is a balance to be struck between offering healthy options and those that ensure the consumer feels they are treating themselves.

The healthier<sup>14</sup> biscuit category is in growth and generates one of the highest values per tonne of all category sub-segments<sup>15</sup>, says Mondelez International's Nash. "As consumer interest in wellbeing is only set to continue, healthier biscuits have a very positive outlook."

Mondelez is tapping into the increasing focus on emotional wellbeing and positivity as well as physical with its latest promotion from the belVita brand, giving shoppers the chance to win a trip to Finland – officially names as the Most Positive Place on the Planet<sup>16</sup>, she reveals. "Available from now until May across the whole belVita range, the promotion is the perfect pick-me-up for shoppers looking for uplifting options in-store. The competition has already seen over 65,000 entries and over 300 winners<sup>17</sup>, she notes.

The healthier breakfast market is shifting towards simpler, whole-food based meals, with sales of fruit (+8.5%), porridge (+7.4%) and eggs (+2.7%) all rising<sup>18</sup>, says Linwoods' Woods. "Millennials and Gen Z are driving this trend, with 39% of 18- to 24-year-olds consuming porridge and 33% opting for overnight oats<sup>19</sup>.

"A key factor behind this shift is the

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growing awareness of ultra-processed foods, with 70% of UK consumers actively trying to avoid them<sup>20</sup>. This aligns with HFSS regulations, reinforcing the demand for nutrient-dense, minimally processed options," he adds.

Meanwhile, indulgence is a major factor in bakery purchases, says St Pierre's Wells. "The bakery category continues to benefit from consumers choosing premium options, as they look for ways to treat themselves well, both on the move and at home," she says. "Hence, in sweet bakery, the popularity of our individually wrapped food-to-go range and take-home multipacks [which include Brioche Swirls, Chocolate Chip Brioche Swirls, Brioche Rolls, Chocolate Chip Brioche Rolls and Chocolate-Filled Crepes]."

Modern consumers are increasingly looking to indulge without the guilt, leading to the rise in 'happy' treats, she adds. "Sweet, guilt-free pleasures are becoming a focus for the industry as consumers allow themselves to have a little of 'what makes them happy', even if it doesn't tick the box for protein and other health credentials," she says. "Consumers are aware of the balance of 'health' and 'wellbeing' and... St Pierre is working on a number of products in this area, all French-inspired, to offer indulgence with quality and flavour at the core."

According to Woods at Linwoods, the permissible indulgence trend is something the company observes daily on its social media platforms. "Consumers, particularly those enjoying our cold-milled flaxseed, are looking for foods that are both nutrient-rich and satisfyingly indulgent. The versatility of our flaxseed range allows it to be incorporated into any meal, providing essential nutrients like Omega 3, protein and fibre, without overpowering the flavour. Dishes like bacon and avocado toast, breakfast burritos and vibrant acai bowls, all topped with Linwoods flaxseed, perfectly illustrate this trend."

Cadbury Brunch Bars, have seen growth in 2024<sup>21</sup> and Mondelez International has recently introduced non-HFSS Cadbury Brunch Light in Honey & Oat and Orange varieties, reveals Nash. "These newly introduced additions already represent a significant proportion of the range in



order to offer shoppers a lighter option which still delivers on taste," she says.

### Advice to retailers

So, with a category in full expansion and plenty of choice on offer, what should retailers be doing to capitalise on the latest trends and win over shoppers in the breakfast aisles?

Rollover's Owen says: "Enhance availability by ensuring breakfast options are accessible to consumers between 6.30am and 11am. It is essential for retailers to offer a competitively priced breakfast meal deal and promote it effectively to attract customers."

**“It is essential for retailers to offer a competitively priced breakfast meal deal and promote it effectively to attract customers”**

"Consumer choice is key," says Mondelez International's Nash. "Whether it's healthier breakfast options from brands they know and love or formats they can take on-the-go for their commute, it's key there is something in your range to suit every shopper, so make sure you include a selection of categories, formats and flavours in your morning offering."

At Linwoods, Woods believes consumers are increasingly curious about the health benefits of their food choices, whether for heart health, menopause, muscle support or immunity. "So, create dedicated breakfast destinations or regular in-store events that focus on cross-merchandising and customer education," he says. "Grouping complementary products, such as Linwoods Flaxseed alongside oats, yoghurts and plant-based milks, not only makes shopping easier but also inspires new meal ideas. Showcasing

# Socials spur breakfast & brunch trends

There is little doubt that social media now plays a huge role meal inspiration and food trends, particularly among the younger generation. According to one report<sup>ii</sup>, 95% of 16- to 24-year-olds have a social media profile, making them the biggest user demographic in the UK. And, when it comes to food, says the report, “young people turn to social media to gather meal inspiration and are influenced by the food trends they see on various platforms”. As such, this can play a strong hand in how retailers should present their breakfast offering to attract the generations of the future.

“Social media

plays an incredibly important role in influencing food trends, especially for breakfast and brunch,” says Rollover’s Owen. “Retailers should embrace social media to raise awareness of their breakfast offering. Platforms like TikTok and Instagram have made it easier for consumers to discover new products and meal ideas. At Rollover, we recognise the power of social media in shaping perceptions and trends, and our current focus is TikTok and Instagram, where we are growing rapidly through creative and fun campaigns.”

Social media platforms like TikTok

and Instagram play a major role in shaping breakfast trends, driving consumer preferences and influencing product choices, agrees Linwoods’ Woods. “With a growing community of over 240,000 in the UK and Ireland, we use these platforms to educate, inspire and connect with health-conscious consumers.

“The impact of social media was evident when we launched our Overnight Oats in Tesco in November 2024, a campaign that generated an impressive 5.5m views across Instagram and TikTok through influencer collaborations. Additionally, our

Flaxseed Pudding recipe reached 2.6m views, proving that consumers are actively seeking easy, nutritious meal inspiration,” he adds.

At St Pierre, its first above-the-line campaign for its brioche – ‘Eat Avec Respect’ – also features on TikTok<sup>iii</sup> and set the brand up “nicely to launch breakfast NPD last year”, says Wells. The campaign extended into in-store activity and in other trade areas, from swing gates to in-store goalposts and cross-merchandising fixtures, bringing it to life across convenience, wholesale depots and major multiple grocers.

simple nutritious recipes taps into trends like permissible indulgence, proving that healthy breakfasts don’t have to be boring. By making health-focused breakfast choices more accessible and engaging, retailers can drive both customer loyalty and sales growth in this expanding market.”

## To conclude

If British Vogue magazine is to be believed, the “Balkan Breakfast is 2025’s new morning flex” according to an article in January this year<sup>22</sup>. So what does this consist of? “Foods included tend to be whole and/or raw: think raw vegetables, bread, meat and cheese”, it says. The Balkan Breakfast is also characterised by a ‘picky’ charcuterie-style offering, it adds.

For those who have long travelled to the continent, the bread, meat and cheese element of this might sound very familiar, but perhaps less so the fresh vegetables – primarily peppers

and tomatoes, plus (somewhat more contentiously) raw onion and garlic, while fermented pickles and kefir, which are gradually gaining traction with a UK audience, might prove more appealing.

While different breakfast trends come and go, the traditional favourites still tend to top the charts. A recent Great British Breakfast Survey by Leonardo Hotels<sup>23</sup> shows that, in the on-trade, the ‘Full English’ still comes out on top as the UK’s favourite breakfast, favoured by 83% of Brits, followed closely by cereal at 81%, a bacon sandwich (79%), croissants and pastries (78%), and pancakes (77%). However, times are changing and the younger generation (16- to 24-year olds) are redressing the balance in favour of pancakes, croissants and pastries, cereal, waffles and smoothies (in that order).

So, while pancake cereals and Balkan Breakfast may not yet be top of consumers’ breakfast wish list, there

remains huge opportunity for diversity and expansion in the UK’s burgeoning breakfast market.

## Sources

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## Opportunity and strategy

<sup>15</sup> See 6

## Socials on breakfast

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<sup>iii</sup> <https://tinyurl.com/52zy4bd>

# Driving demand for cereals

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**KEY BRANDS**

**Kellogg's Oaties**  
– Original Crunch  
and Choco Crunch  
**Kellogg's Corn Flakes**  
**Kellogg's Coco Pops**  
**Kellogg's Rice Krispies**  
**Kellogg's Special K**

➔ Cereal is the number one food category at breakfast, present in 57% of occasions<sup>1</sup>. With the increase in hybrid working and weekend habits creeping into weekdays changing the shape of the breakfast occasion, category leader<sup>2</sup>, Kellogg's, is using this opportunity to bring forward a compelling vision. Its focus is to attract new households to the category and add more value for loyal consumers.

“We are seeing consumers continue to balance requirements for taste, convenience, value and health, with the huge macro food trend of protein and high fibre also transcending into the cereal category,” says Andy Williams, revenue & channel director, Kellogg's UKI. “New products continue to play a vital role in driving growth, as the category thrives on new news.”

In January 2025, Kellogg's launched a brand new cereal, Oaties – in Original Crunch and Choco Crunch flavours – an oat-based crunchy cereal, that is non-HFSS, high in fibre with added B vitamins and iron, reveals Williams. “Food developers worked on the recipe for months to deliver the multilayered texture that ensures each bite maintains its signature crunch,” he says.

Kellogg's continues to recommend a shopper-centric approach based on ongoing research with shoppers and different store trials to determine optimal ranges, layouts and flows, says Williams. “The increasing emphasis on retail media has made its way into the cereal aisle, with branded bays, floor stickers and other POS, which helps shoppers navigate but also drives branded sales, adding value to the category,” he notes.

Kellogg's has been at breakfast



“We are seeing consumers continue to balance requirements for taste, convenience, value and health, with the huge macro food trend of protein and high fibre also transcending into the cereal category”

tables since 1906 and takes its position as market leader seriously. It recently revealed a bold new look for its cereal portfolio and Masterbrand, building on its legacy and to spur a new growth era for its cereal brands. Cornelius the cockerel, Kellogg's beloved mascot since 1958, has been reimagined in 3D form, brimming with swagger and personality – and will feature on advertising across Kellogg's iconic cereals.

“We understand our responsibility to drive category demand, making it a dynamic, exciting and investable category for retailers,” says Jenn Carkner, VP of cereal transformation at Kellogg's Europe. “We believe we have a compelling vision for the category, anchored in a deep understanding of consumers and what they want.”

As well as introducing some exciting NPD in 2025, it is also giving shoppers more reasons to buy Kellogg's through world-class partners, such as Merlin, where it offers an on-pack promotion for 25% off UK-wide family attractions.

In October 2024, Kellogg's celebrated a major milestone for cereal, as it pledged to invest £75m into its Wrexham factory, making it the largest cereal plant in Europe, as well as the biggest investment in British cereal for 30 years. This demonstrates its continued commitment to future innovation and investment in this much-loved breakfast staple.

**Source**

<sup>1</sup> Kantar Usage Panel, 52 w/e 24.12.23  
<sup>2</sup> Circana, Value sales, All outlets, Total cereals, 52 w/e 28.12.24



The



*Kellogg's*  
See you in the morning

# Investing for growth

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- Linwoods**
- Overnight Oats
  - Cold Milled Flaxseed blends
  - Chia Seeds
  - Milled Hemp Seeds
  - Active Nuts
  - Functional: Menoligna & Immune Support

 Linwoods, a family-owned company with roots in Northern Ireland, has a long history of providing communities with nutritious seed blends, flaxseed and other health foods.

Patrick Woods, MD, states: “Our commitment to quality and innovation has made us a trusted name in the health food sector, with flagship products like our cold-milled flaxseed and diverse seed blends leading the way in providing convenient and wholesome nutrition. But we’re not just about what goes into our products; we’re equally focused on how we create them, with quality at the absolute forefront.”

Linwoods has experienced significant growth over the past two years, driven by increasing demand for its core seed range in key markets like the UK, Ireland, Spain, Italy and France. This surge in popularity has resulted in both higher customer penetration and more frequent purchases of its cold-milled seed products, particularly as a healthy addition to breakfasts, salads and cooking. Furthermore, the successful launch of the Linwoods Overnight Oats range has secured listings in major European supermarkets, including Tesco, Carrefour, Morrisons, Esselunga and, soon, Sainsbury’s.

This expansion has presented exciting opportunities, but also key challenges. “To meet the rising demand for our products – and anticipating further growth on the horizon – we’ve invested heavily in strengthening our infrastructure and boosting production capacity,” explains Woods. “Scaling up our output has been paramount, and our team have been worked tirelessly to ensure seamless operations.”

Linwoods has implemented a new ERP system, providing enhanced efficiency, transparent stock management and more effective forward-planning. Also, the main production site at Linwoods has undergone a major transformation, with significant investment in new machinery and a redesigned layout. “These improvements have doubled our production capabilities, positioning us to meet current demand and future expansion. We’re now engaged in an



**“To meet the rising demand for our products – and anticipating further growth on the horizon – we’ve invested heavily in strengthening infrastructure and boosting production capacity”**

ambitious project, due for completion by Spring 2025 to enhance staff facilities at our production site, creating upgraded meeting rooms, modern offices and a spacious canteen.”

Sustainability is at the heart of the Linwoods’ redevelopment project. The team has significantly increased renewable energy capacity by installing additional PV panels, boosting output from 50kW to 200kW, and have worked to secure an alternative to natural gas. “We’re transitioning to biomethane to replace 50% of our previous natural gas usage, resulting in a remarkable 90% reduction in emissions,” enthuses Woods. “This initiative underscores our deep commitment to providing consumer-focused innovative products through environmentally responsible practices, extending from our plant-based products and packaging to every aspect of our operations. At Linwoods, we believe nourishing people and nourishing the planet go hand in hand.”



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For listing enquiries please contact [info@linwoods.co.uk](mailto:info@linwoods.co.uk)

[linwoodshealthfoods.com](http://linwoodshealthfoods.com)

Protein contributes to the growth and maintenance of muscle mass.  
Magnesium contributes to the reduction of tiredness and fatigue.  
Omega 3 (ALA) contributes to the maintenance of normal blood cholesterol levels.  
The beneficial effect is obtained with a daily intake of 2g of ALA.



# Focus on taste, health and convenience

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**Trebor**  
**Maynards Bassetts**  
**Halls**  
**belVita**  
**Cadbury Biscuits**  
**Mikado**  
**Toblerone**  
**OREO**  
**Ritz**  
**Barny**  
**Sour Patch Kids**

Healthier\* biscuits are in growth<sup>1</sup> and are therefore a key part of any retailer's breakfast range to offer shoppers a convenient, tasty and familiar breakfast option, says Susan Nash, trade communications manager at Mondelez International. "We've seen a 6%<sup>2</sup> year-on-year increase in on-the-go missions within healthier\* biscuits, with shoppers increasingly looking for snacks while out and about," she says. "Brands like belVita and Cadbury Brunch range are, therefore, a key pillar of a retailer's breakfast range in order to cater to these shoppers with a range of formats and flavours.

"Breakfast and brunch options that can be taken out-of-home for convenient on-the-go consumption will continue to grow this year, and any retail range should meet all potential need states and occasions, while also delivering on taste. "Our belVita range offers a proposition of 'Positive Energy' with a recipe of five different wholegrains," she adds. "The full range offers a host of moreish flavour combinations and textures, with the entire Soft Bakes selection now being non-HFSS, after transitioning our bestselling Soft Bake Choc Chip and Choco Hazelnut SKUs to non-HFSS formulas at the end of 2024."

For shoppers looking for the iconic taste of Cadbury in their mid-morning snack, Cadbury Brunch has also



**“We’ve seen a 6%<sup>2</sup> year-on-year increase in on-the-go missions in healthier\* biscuits, with shoppers increasingly looking for snacks while out and about. So, brands like belVita and Cadbury Brunch are a key pillar of a retailer’s breakfast range”**

tapped into the growing trend towards healthier\* snacks with the recent launch of a non-HFSS range – Cadbury Brunch Light – to help retailers unlock additional healthier\* snacking sales from this popular brand, notes Nash.

"The launch of Cadbury Brunch Light follows the success of the wider Cadbury Brunch range, which saw strong growth in 2024," she says. "Cadbury Brunch is now the most popular snack in the Cadbury Biscuit range<sup>3</sup>, and Cadbury Brunch Chocolate Chip is now the No.1 SKU<sup>4</sup> within healthier\* biscuits. The Cadbury Brunch Light range is non-HFSS, with each bar containing fewer than 100 calories. Cadbury Brunch has very strong taste credentials, which the brand highlights in its 'But Actually Tasty' campaign, which looks to dispel the myth that snacks within this sector have to compromise on taste.

"Ultimately, offering consumers choice is vital to breakfast sales. Whether it's options from brands consumers know and love or formats they can take on-the-go for their commute, it's key to have something to suit every shopper."

**The Harmony Wheat Charter**

The Harmony Wheat Charter\*\* is a regenerative charter that aims to have a lasting impact by contributing to the company's net zero commitment, reversing biodiversity losses, supporting farmers in transitioning to regenerative agricultural practices while driving quality of wheat in its biscuits. Over 1,100 farmers in seven European countries are involved in the programme\*.



**Source**

<sup>1</sup> Nielsen, Total coverage, YTD 09.11.24  
<sup>2</sup> Kantar TH + OTG Shopping Missions, 12 w/e 12.03.24, Q1 23 vs Q1 24  
<sup>3</sup> Nielsen, Total coverage, YTD 09.11.24  
<sup>4</sup> Nielsen, Total Coverage, Healthier, Rolling 52 w/e 01.02.25

\* As defined by Nielsen  
\*\* For more information go to Harmony.info  
\* Progress against goals as of end of 2023

# belVita

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TO THE MOST  
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# Bringing breakfast to life

**DETAILS**

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**KEY CONTACTS**

**Nicola Blackmore-Squires**  
Marketing Director

**KEY BRANDS**

**Kerrygold**  
**Pilgrims Choice**  
**Beo Milk**  
**Forto**

↙ Kerrygold, the UK’s fastest-growing major butter brand and No.2 branded block butter<sup>1</sup>, has launched a unique new line-up of sweet, spreadable butters. In a UK category-first, the Kerrygold Sweet Spreadable Butters have been created to help consumers elevate breakfast time with new and exciting flavours.

The range features three sweet, creamy and indulgent blends, which are perfect for spreading on pancakes, croissants, waffles, bagels or simply on toast, says Nicola Blackmore-Squires, marketing director at Ornua Foods UK. They include:

- Kerrygold Sweet Spreadable with Maple Syrup – naturally golden and deliciously creamy Kerrygold butter blended with rich, sweet, maple syrup and rapeseed oil;
- Kerrygold Sweet Spreadable with Maple Syrup & Cinnamon – Kerrygold butter, blended with maple syrup, a delicious hint of cinnamon spice and rapeseed oil;
- Kerrygold Sweet Spreadable with Salted Caramel – Kerrygold butter blended with luxurious salted caramel and rapeseed oil.

Breakfast is already the largest meal occasion for the use of butters and spreads with growth in the consumption of morning goods such as croissants, waffles and pancakes driving increased usage<sup>2</sup>, she notes. “The launch of Kerrygold Sweet Spreadables aims to take this to the next level by meeting the desire of a growing number of consumers who want to explore and expand the



“The launch of Kerrygold Spreadables aims to meet the desire of a growing number of consumers who want to explore and expand the breakfast experience by incorporating new flavours and textures and bringing a little bit of café culture into the home”

breakfast experience by incorporating new flavours and textures and bringing a little bit of café culture into the home.

“We are incredibly excited to launch the first sweet, spreadable, butter range in the UK market, which is not only a category-first in the market but also a first for the Kerrygold brand globally. Kerrygold Sweet Spreadables provide consumers with an exciting way of adding delicious flavours like cinnamon and maple syrup into breakfast dishes quickly and easily.

“Our mission is to transform the butter category from being functionally driven to one that inspires and elevates simple pleasures. With the arrival of Kerrygold Sweet Spreadables, we are tapping into the key trends within the butter category to appeal to the growing number of pleasure-seeking consumers that are looking for new food and taste experiences – all the while delivering the attributes of quality, provenance and great taste that Kerrygold is known for.”

Kerrygold Sweet Spreadables are available in convenient 150g tubs with an RRP of £2.95. The new range will be supported by print and online media advertising; digital and social media activity; and point of sale activation in stores.

**Source**

<sup>1</sup> Circana, EPOS 52 w/e 25.01.25. IRI All Outlets GB & KWP Discounters  
<sup>2</sup> Kantar Usage Data 52 w/e 12.05.24



# Sweet Spreadable Butter Range

BREAKFAST READY FLAVOURS



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\* IRI ALL OUTLETS 52WK W/C 25 JAN 2025

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CONTACT: [KERRYGOLDUKTEAM.LEEK@ORNUA.COM](mailto:kerrygoldukteam.leek@ornua.com) FOR MORE INFORMATION

## Rollover

# Creating convenient and tasty on-the go

### DETAILS

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**Ashley Fletcher**  
Commercial Director  
**Elodie Bretz**  
Head of Marketing  
**James Hawkins**  
Head of Retail Sales

### KEY PRODUCTS

**Classic Hotdog**  
**Chilli Cheese Hotdog**  
**Halal Chicken Hotdog**  
**Veggie Vegan Hotdog**  
**All Day Breakfast Sausage**  
**Sausage & Cheese Muffin**  
**Southern Fried Chicken**  
**Fillet Burger**  
**Cheese Burger**  
**Jalapeño Cheese Poppers**  
**Chicken Nuggets**

At Rollover, we pride ourselves on staying at the forefront of innovation, continually launching exciting new products and delivering exceptional quality, says general manager Tony Owen. “Over the past year, we’ve introduced a range of customer favourites, and we’re set to roll out even more in 2025.

“One of our standout launches last year was our Southern Fried Chicken Fillet Burger, which quickly became a must-try item for hot food-to-go enthusiasts craving a hearty, delicious meal. Featuring perfectly seasoned, crispy chicken fillets, this burger offers a flavourful and satisfying option that appeals to today’s fast-paced consumer.”

Meanwhile, our All Day Breakfast Sausage Baguette and Sausage & Cheese Muffin continue to be crowd-pleasers, delighting taste buds with unbeatable convenience and mouthwatering flavour, adds Owen.

“As we look ahead to 2025, we’re



# Rollover®



# ALL OR

## ALL DAY BREAKFAST SAUSAGE BAGUETTE



# breakfast solutions for retailers



thrilled to continue expanding our range. We plan to introduce two exciting new chicken products and enhance our existing breakfast range with the launch of a Sausage, Cheese & Egg Muffin and a Bacon & Sausage Baguette,” he reveals.

“Delivering great products is just the beginning. To ensure our offerings stand out, we’ve developed a comprehensive merchandising and marketing strategy. Our point-of-sale (POS) materials – ranging from eye-catching posters to impactful on-shelf packaging – are strategically designed to make our products impossible to miss. This ensures our products are prominently displayed in-store, helping to attract attention and drive sales.

“We don’t just showcase our products; we create a visually engaging experience for consumers at every touchpoint, from the moment they approach the store to their in-store journey,” he adds. “Our clear, compelling messaging

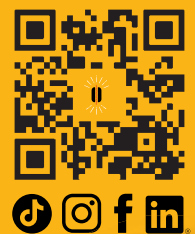


“We deliver a premium hot food-to-go solution”

highlights the value and quality of our products, while in-store promotions and meal deals inject excitement and urgency, encouraging consumers to make a purchase.”

What truly sets Rollover apart is its commitment to delivering a premium hot food-to-go solution, notes Owen. “Unlike many in the industry, we offer free-on-loan equipment, ensuring our food is served fresh and hot every time. This innovative approach guarantees consumers the best possible experience, while also helping our retail partners deliver a high-quality service without the need for significant upfront investment in equipment.

“Our focus on high-quality ingredients, convenience, and value has solidified Rollover as a leader in the hot food-to-go sector. By offering convenient, handheld meals that are carefully prepared and easily delivered, we’ve set a new standard for what a great hot food experience should be.”



# MUFFIN

SAUSAGE & *cheese* MUFFIN



**St Pierre**

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# Bringing new life to breakfast

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**Rachel Wells**  
Commercial Director

**KEY BRANDS**

**St Pierre All Butter Croissants**  
**St Pierre Brioche Buns**  
**St Pierre Seeded Brioche Buns**  
**St Pierre Brioche Loaf**

➔ Bakery occasions is the area driving growth in UK bakery, up 5% year-on-year (YoY) and accounting for 41% of the ambient bakery market. Within that, breakfast is the largest sector, worth more than £1bn, making breakfast the bakery category to win<sup>1</sup>.

St Pierre is doing just that, laying claim to the fastest-growing brand in UK bakery<sup>2</sup> and the fastest-growing brand in breakfast bakery<sup>3</sup>, with volume and value growth of more than 25% YoY<sup>4</sup>. Commercial director Rachel Wells comments: “St Pierre has had a fantastic year. Summer 2024 saw us invest significantly in the brand, with the launch of our ‘Eat Avec Respect’ campaign and the launch of breakfast NPD with All Butter Croissants in September. As a result, St Pierre is delivering 12% of the growth in bakery occasions<sup>5</sup> and maintaining position as the UK’s No.1 brioche brand<sup>6</sup>.”

“Now accustomed to enjoying restaurant-quality products at home, UK consumers have embraced the brand, experimenting with bakery staples that have been given new life thanks to the versatility of brioche.”

St Pierre continues to drive breakfast growth through its core range of Brioche Buns, Seeded Brioche Buns and Sliced Brioche Loaf, but its continental offering is also helping to bolster performance. St Pierre is up in value and volume in both the



“Bakery, as a whole, is outperforming food and drink and gaining share across all consumption occasions. So, the opportunity for St Pierre – and our customers – is really exciting”

‘continental’ and ‘sweet brioche’ sub-segments and can also add the accolade of ‘fastest-growing brand in crêpes’ to its ever growing list<sup>7</sup>.

St Pierre has plenty of plans in place to continue supporting sales throughout the year, with innovative in-store displays and multi-channel marketing set to ramp up again from Q2 this year, when the brand will return to UK TV screens. The brand’s steady stream of NPD and consistent quality has enabled it to bring new shoppers to the bakery category – and breakfast in particular, adds Wells. “The brand’s performance in the UK is exemplary and has been delivered despite shoppers being cost-conscious, because the quality of our products wins out<sup>8</sup>,” she says. “We’re proof that shoppers are willing to spend a little extra in a low-value category like bakery, to elevate an entire meal.”

“Bakery, as a whole, is outperforming total food and drink and gaining share across all consumption occasions.

So, the opportunity for St Pierre – and our customers – is really exciting. This year is all about continued brand-building, raising awareness of our premium offering, and working with retailers to ensure we’re delivering quality products that cater to consumer demands.”



**Source**

<sup>1</sup> Kantar Worldpanel, Bakery KPI report, 52 w/e 26.01.25  
<sup>2</sup> Circana, Ambient Bakery, 52 w/e 25.01.25 – of the top 10 brands in bakery occasions  
<sup>3</sup> Circana, Ambient Bakery, 52 w/e 25.01.25 – of the top 10 breakfast bakery brands  
<sup>4</sup> Circana, Total Bakery, St Pierre Brand, YTD 25.01.25  
<sup>5</sup> Kantar Worldpanel, Bakery KPI report, 52 w/e 26.01.25  
<sup>6</sup> Circana: Ambient Bakery, 52 w/e 25.01.25  
<sup>7</sup> IRI Circana, Total Grocery Outlets, L52 weeks to 05.10.24



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EAT AVEC RESPECT

\*Circana: Ambient Bakery | 52 w.e.25.01.25 \*\*Circana: Ambient Bakery | 52 w.e.25.01.25 (in the top 10 bakery brands) \*\*\*Circana: Ambient Bakery | 52 w.e.25.01.25 (in the top 10 croissant brands)

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