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The Grocer Guide to...

The Grocer

Breakfast & brunch



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A recent report in The Grocer* pointing to the recent decline of the top 10 cereal brands would suggest that the breakfast & brunch sector is needing a shot in the arm. Yet with multiple choices ranging from bakery to fruit, there is plenty of innovation opportunity to meet consumers' varied needs, ranging from health to permissible indulgence

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* <https://www.thegrocer.co.uk/cereals/why-cereal-brands-need-to-wake-up/687398.article>

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Analysis



Multiple options

The sheer variety of choice for breakfast & brunch is getting broader with health and permissible indulgence the key drivers

Among the multitude of quotes referencing breakfast as important to consumer health, one of the loveliest reads: “Breakfast is the canvas on which you paint your day”¹. While the source of this is unattributed, breakfast is undoubtedly the meal that heralds a daily fresh start and, as such, can be seen as one of the most optimistic occasions on which to enjoy food and drink.

Recognising this, the UK’s on-trade sector (restaurants, cafés and hotels) has tapped increasingly into the breakfast & brunch opportunity, with a vast array of options now available. According to one survey², top eating-out trends for brunch in 2024 include avocado toasts, brunch boards and bottomless mimosas, swiftly followed by vegan and vegetarian options.

Moreover, opportunities in the on-trade sector for attracting early risers have certainly diversified since Covid³, notes Egg Soldiers – a concept creation, menu development and business consultancy company. It points to the “healthy eating macro trends, the idea of permissible indulgence, and the ongoing cost-of-living crisis all playing their respective roles to varying degrees” in where consumers choose to eat breakfast and brunch and what they choose to consume.

“Breakfast choices are also broadening in UK retail, with high in fat, sugar and salt (HFSS) restrictions drawing focus on healthier breakfast development, and on-the-go options rolling out to meet evolving demand from the time-poor and snack-centric,” it adds.

All of this plays into the increasing diversification of the breakfast & brunch sector and the influence that out-of-home occasions have on the variety of choice for consumers when it comes to at-home morning menus.

Suppliers to the breakfast & brunch category agree that the occasion has developed significantly since hybrid working became the norm and that there are multiple opportunities to cater to satisfying on-the-go breakfasts during weekdays, as well as more leisurely brunches at the weekends.

In fact, breakfast sees 20.2bn in-home consumption occasions each year⁴, says Christina Honigfort, marketing & insights director at Grupo Bimbo UK, owner of the New York Bakery Co. “Consumers are impacting the number of in-home breakfast occasions as they

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continue to work remotely and less frequently at the office,” she says. “This effect is amplified by the financial pressures on consumers; there is a strong desire to enjoy favourite out-of-home breakfast options more cost-effectively at-home, creating ‘in-home café culture,’” she says. “Adapting and evolving in line with these changes is key to driving growth and ensures retailers are able to capitalise on the growing number of morning goods occasions at breakfast (+300m occasions v 4YA⁵).

“More than ever, consumers are looking for a multitude of options when it comes to the breakfast and brunch occasion, shown by the growth of both the bagel (+13.8%) and morning goods (+5.9%) sub-categories⁶,” adds Honigfort. “This means retailers must offer a range of high-quality, tasty and affordable products to meet this demand – something the bagel heartland of New York Bakery Co is designed to deliver.”

Bakery is a hugely popular category at the breakfast occasion, with over one-third of all breakfast meals including a bakery product and wrapped bread being responsible for around three-quarters of those⁷, says Colin Bebbington, sales director at Warburtons. “The bread category has remained resilient despite a slight dip in volumes of -3%⁸, with 30m loaves still being sold each week,” he says. Within this, Warburtons grew unit sales by 4.5%⁹ following its recent advertising campaign featuring Samuel L Jackson, he reveals.

“While shoppers continue to look for ways to save on their weekly shop, bakery is one of the last places they choose to make changes,” adds Bebbington. Growth in the bakery category has been driven by the bakery occasions sector, as consumers look for different, exciting meal options such as crumpets, pittas, bagels, naans and thins, he explains.

“The growth in bakery occasions is a long-term trend with volumes 20% higher than pre-Covid¹⁰,” he notes. “More than half of bakery snacks are eaten at breakfast¹¹, with crumpets the largest sector selling over 3m packs per week¹². Warburtons Thin Crumpets, launched in spring 2023, are forecast to deliver almost 10m in sales in its first 12 months and there has also been an extra 10m packs of muffins, potato

cakes and pancakes sold in 2023¹³, with these products providing great alternatives for exciting breakfasts and brunches.”

According to United Food Brands, the waffle sub-sector is growing at 14%¹⁴, with its flagship brand Waffle Amour, outperforming the wider category, thanks to new listings and distribution increases in the multiple retailers, reveals managing director Richard Reeves. This has seen the company gain back to back year-on-year sales growth of 32%¹⁵ and 20%¹⁶ respectively, he explains.

For Linwoods Health Foods, which has been a staple in the European health foods market for over two decades, the past 18 months has seen a surge in demand in the UK market, outpacing all other regions it operates in, reveals Patrick Woods, managing director of the company. “We believe this boom is fuelled by the growing consumer interest in health & wellness and the trend towards plant-based diets and specific dietary needs,” he says. “Online and supermarket grocers have upped their game in recognition of this consumer behaviour, offering competitive prices, strong product placements and even health-related services to attract shoppers seeking nutritious, sustainable and convenient food choices. This trend has led to wider availability and, ultimately, increased sales.”

Linwoods has recently stepped into the breakfast category with its Overnight Oats brand. “We strive to develop products with superior taste, texture and convenience, making healthy choices easier and more enjoyable,” adds Woods.

Fruit is the fourth most popular food to be eaten at breakfast¹⁷ after cereal, bakery and porridge, according to data from Mintel, reveals Gareth Roberts, UK country sales manager at Dole Sunshine Company. “After all, who doesn’t enjoy some natural Greek yoghurt with fruit on top as a tasty and nutritious start to the day?” he asks.

Consumers are looking for breakfast items that are not only easy to prepare and healthy, but also convenient and can be consumed on-the-go, he says, noting that this is where the company’s fruit in juice cups range can really come into play, with sales growth of 25.6% in the last 52 weeks¹⁸.



“Consumers are looking for breakfast items that are not only easy to prepare and healthy, but also convenient and can be consumed on-the-go”

Health and indulgence

In terms of both mental and physical health, breakfast plays an important role and is the occasion where consumers really seek to set up their day in a positive way.

Research has found that 85% of shoppers say they have healthy eating priorities¹⁹, reveals Mondelez International trade communications manager Susan Nash. “Demand for vegetarian and vegan alternatives is growing²⁰ while we see moments of indulgence continue to be increasingly



important, particularly for younger adult consumers²¹ as a way of winding down and reducing stress,” she says. “The healthier²² biscuit category is in growth and generates the highest value per tonne of all the [biscuit] category sub-segments²³. As consumer interest in wellbeing is only set to continue, healthier biscuits have a very positive outlook.”

While the cost-of-living crisis has seen shoppers become more savvy on how they spend in-store, more have turned to bakery to make their mealtimes more exciting, says Warburtons’ Bebbington. “Bakery offers a huge range of choice for breakfast and brunch, from bread to bagels, crumpets, pancakes, potato cakes and teacakes,” he notes. “Crumpets have been a real breakfast staple for many years, but they are

increasingly being used as a versatile way of making an indulgent or a healthy meal at home.

“We are also seeing growth in our more overtly healthy products, such as Protein Thin Bagels, which are becoming more popular at breakfast and brunch as consumers make every effort to get more protein in their diets.”

There is definite growth in healthier bakery options, particularly protein, and Warburtons believes this will only continue to increase in popularity. The company launched a new loaf, Protein Power, “which is doing very well as people look for more interesting ways to get protein into their diets”, he says. In addition, the launch of the company’s Crumpet Thins helped to fuel sector penetration growth to above 60%²⁴, he adds.

20.2bn
The number of in-home breakfast consumption occasions each year⁴
Kantar Usage Panel

+20%
The growth in the bakery occasions market compared to pre-Covid¹⁰
NielsenIQ Scantrack

36%
of breakfast eaters say health has prompted them to change what they eat for breakfast over the past 12 months²⁸
Kantar Profiles/Mintel

The greater demand for protein is prompting LSI, with its Peperami brand, to look at the breakfast and brunch opportunity, given its potential to offer a protein-rich option. “The chilled meat snacks category has doubled in value over the last five years to £262m²⁵,” reveals LSI country director UK David Harriman. “Now, nearly one in every three households buy a meat snack, which is huge. As more and more shoppers seek out convenient, tasty snacks with a protein kick to pep them up, it’s ideal for brunch.” The company has continued to innovate to meet this fast-growing demand with the launch of Pizza Buns and Chicken Bites, which Harriman says are fuelling incremental category growth.

“Peperami Pizza Buns meet demand for more permissible indulgence,” he

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explains. “They are made with bread, ready to eat and are a more filling tasty snack. Peperami Chicken Bites meet the demand for more healthy eating by stretching into chicken.”

As consumers continue to make tough decisions on where money is spent, many are looking to treat themselves during everyday family moments at home, says Grupo Bimbo’s Honigfort. “As breakfast is the largest in-home occasion for total bakery, growing by 154m occasions over the last year²⁶, it is crucial that retailers offer a range of options for consumers to enjoy each morning at home,” she says. “Purchasing a tasty, filling and nutritious breakfast is one way in which consumers are allowing themselves to have a treat during a time of increased financial pressures – starting their day right with a breakfast which is anything but boring.”

Moreover, in a post-HFSS world, consumers are searching for permissible treats, and sweet bagels are in demand as part of this shopping habit, she adds. “The launch of Cookies N’Cream – a truly one-of-a-kind New York bagel – showcases the brand as innovative and demonstrates that bakery brands which listen to consumers will see success. New York Bakery Co, has seen its first limited-edition flavour grow to £623k RSV since launch in September 2023²⁷.”

Two companies clearly focused on healthy options are Linwoods and Dole.

For Linwoods, one of its key mantras was summed up by an article in The Grocer in 2022, which read: ‘Innovation in the breakfast cereal category is a balance between form and function – consumers are time-poor but still looking for healthy options’, reveals Woods. “So our task was quite clear,” he says. “We had to create a breakfast solution which is genuinely healthy and offers functional benefits, tastes great and is easy to make – hence the development of Linwoods Overnight Oats.”

Healthiness is certainly high on consumers’ radars with a recent report showing 45% of consumers consider how many calories are in their breakfast as part of their daily intake, and 36% of breakfast eaters revealing that health reasons have prompted them to change what they have for breakfast over the last 12 months²⁸, reveals Dole’s Roberts. This was one



reason why the company embarked on a redesign of its fruit in juice range towards the end of last year, with packs now featuring clear ‘no added sugar’ and ‘vegan-friendly’ messages.

While he agrees that the cost-of-living crisis is continuing to impact consumers’ shopping behaviours, encouraging them to be more conscious of product value for money and incorporating quality, waste, convenience and choice, Roberts says this is where ambient products have a role to play. While fresh fruit can come at a premium price, shoppers now understand that ambient goods offer good value and have longer shelf-lives.

“Healthiness is certainly high on consumers’ radars, with a recent report showing 45% of consumers consider how many calories are in their breakfast²⁸”

Dole’s packaged fruit range can be one of their five-a-day and a healthy part of their overall diet, he adds. Plus, with a four-pack of its fruit in juice cups at £2.29 or a 227g small pineapple chunks can for £1, both offer a healthy product at a price most shoppers are able to afford, he says.

Meanwhile, a focus on children’s health has led Koko Dairy Free to introduce an allergen-safe dairy alternative for kids, Koko Kids Free From Milk. The low-sugar milk alternative, made with plants, is “packed full of vitamins and minerals” to ensure children receive similar nutritional benefits to dairy milk, as well as a great taste, reveals Victoria Eadon, marketing director at the company.

Social media influence

There is little doubt that social media is having an increasing impact on consumer inspiration and shopper

Favoured flavours and global influences



At United Food Brands, the company has a range of snack-size mini waffles launching into one of the top four grocery mults in Q2 this year. And, due to its success in retail, it is also planning to move the brand into foodservice later in the year. Meanwhile, a move into the morning goods category will see the launch of two licensed Mars and Milky Way multipack filled croissants, with listings already agreed in four of the grocery mults.

For Mondelez International, Nash says that shoppers looking for the iconic taste of Cadbury in their mid-morning snack, can opt for

Cadbury Brunch Oat Bars, available in Chocolate Chip, Raisin, Bournville and Peanut options.

Moreover, to continue to meet the demand for healthier offers through the day and beyond breakfast, the company has introduced a Dark Chocolate & Orange option to its belVita healthier¹ biscuit range, made with a recipe of five different wholegrains.

At Linwoods, Woods notes that Kerry 2023's Taste and Nutrition Charts Europe² pointed to chocolate and strawberry as the best-selling flavours in breakfast – “and that rang true to our qualitative research when we taste-tested

our Overnight Oats range as part of the development process”, he says. The current range consists of three flavours: Strawberry Chocolate and Original, he reveals, with each blend hosting nutritiously dense ingredients. The Strawberry and Original deliver energy-supporting B vitamins and minerals, while the Chocolate version offers plant-based protein for muscle growth and provides magnesium, which combats tiredness and fatigue, as well as supporting muscle function. Building on the success of this launch, the company is now exploring new flavours based on

consumer feedback, including popular options like nut butter and caramel.

There is notably more international influence coming through from global cuisines on breakfast and brunch options, both in restaurant/caf  settings and retail markets, adds Woods. “The popularity of savoury breakfast items like avocado on toast, breakfast burritos and a ai bowls are all testament to this,” he says. “Additionally, the rise of retail products like packaged savoury breakfast pastries and flavoured yogurt varieties further demonstrates the spillover effect from on-trade to retail.”

choices in food and drink. A study in the US last year²⁹ revealed that 41% of consumers had seen social media content on food and nutrition in the past year, with the percentages higher among Gen Z at 71% and Millennials at 58% than among Gen X at 36% and Baby Boomers at 22%. So, any brands looking to make an impact with a younger audience clearly need to embrace social media as part of their overall marketing strategy.

Engaging shoppers in their natural habitat is key to driving brand consideration and, in turn, purchases, says Grupo Bimbo's Honigfort. “Social media influencers offer something that no other channel can: social validation, plus the incomparable opportunity to reach target audiences as part of their routine,” she says. “New York Bakery Co is no stranger to working with social media content creators to land its USPs around New York, taste, range and versatility. Investing more than

ever before in social media content creators throughout 2023, the brand has highlighted social media as one of its hero channels for reaching its target audience.

“Working with audience-aligned social media influencers on a long-term basis has created dedicated brand advocates, whose audience is intrinsically tuned into the content they deliver,” she notes. “These audiences trust social media influencers, including their brand and product recommendations, as they would do a peer. This steady stream of influencer advocacy runs parallel to an always-on social media presence for the brand... [and] social media will sit at the heart of its marketing plans through 2024 and beyond.”

Social media has become a place for trends to be born and for people to seek out or share recipe inspiration, says Warburtons' Bebbington. “We are seeing traditional breakfast or

brunch bakery products – such as crumpets, bagels and even a good old slice of bread – being used in new and inventive ways, often aided by an air fryer. We use social media to excite and delight consumers with fun, engaging content, influencer partnerships and by offering recipe ideas linked to trends, such as our Protein Bagels.”

Social media's influence on the breakfast scene is undeniable, agrees Woods from Linwoods. “Platforms like TikTok and Instagram are filled with creative and visually appealing breakfast ideas, shaping both consumer preferences and the offerings of breakfast venues,” he says. Instagram, TikTok and food blogs have also amplified the visibility of international food trends, making them accessible and inspiring to the everyday shopper, he says.

The company is highly attuned to online trends as the surge in popularity of overnight oats on platforms

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like TikTok directly inspired the development of Linwoods Overnight Oats range, reveals Woods. “In 2023, overnight oats had over 2.2bn views on TikTok and was the most on-trend recipe on social media,” he says. “We will continue monitoring the ever-evolving breakfast landscape, creating new offerings to cater to the changing needs and preferences of our health-conscious consumers.”

In addition, the air fryer trend has impacted the breakfast scene, adds Woods. “Its fast and versatile nature aligns well with the growing desire for convenient and healthy breakfast options. We’ve also observed a rise in air-frying recipes that we’ve been tagged in on Instagram incorporating Linwoods products such as of Cold Milled Flaxseed, further demonstrating the popularity of this social media trend.”

With a recently successful marketing campaign called ‘Add Some Wow’, Dole challenged consumers to consider adding tinned pineapple slices to their full English breakfast or bacon butties, reveals Roberts. “A large part of that was partnering with Le Swine, a luxury buttie delivery company, to send out pineapple buttie kits to the UK’s top food and lifestyle influencers, with lots of coverage and social buzz generated as a result of the content posted on their social channels, like Instagram and TikTok,” he explains.

Future

Suppliers in the breakfast & brunch sector are clearly aligned on the key trends that will continue to influence consumer purchase across the rest of the year.

Health, permissible indulgence and variety all continue to be key drivers of innovation – and bakery is no exception, says Warburtons’ Bebbington. “Consumers continue to look for products with additional health benefits, such as seeds, grains, fibre and, in particular, protein, which has flown up the consumer health agenda. As they strive to get more protein in their diet across all meal occasions, they are looking for new and more interesting ways to do this. Innovating in this area will be essential to meet consumer demand for health and choice.”

In terms of permissible indulgence, he says consumers will continue to



seek out products that help them recreate food trends and out-of-home meals in the comfort of their own home. “It would be remiss to think that consumers are not looking for moments of indulgence at the same time as being health conscious – be that as simple as a ‘posher’ slice of toast such as Warburtons Soft Tiger Bloomer or a sweet treat like pancakes.”

According to Dole’s Roberts, the three biggest trends across 2024 will be: consumers continuing to look for healthy breakfast options, whether it be low in sugar, high in fibre, gut-health or vitamin fortified; suppliers responding to this demand by increasingly

clarifying the nutritional benefits on the packaging of their breakfast products; and finally, the continued rise in the popularity of breakfast on-the-go options.

Sustainability, personalised breakfasts to meet the needs of specific dietary requirements, and versatile breakfast options which can be enjoyed at any time of day are all trends that Linwoods’ team has picked up on as being at play in the breakfast/brunch arena, says Woods. However, the top three trends he highlights for the year ahead include functional benefits, healthy without a compromise on taste, and convenience.

Looking forward to the rest of 2024, sweet breakfasts will continue to rise as a key trend, as shoppers turn to treating themselves at home to keep costs down as opposed to eating out, says Grupo Bimbo’s Honigfort. With this in mind, New York Bakery Co is continuing to innovate and tap into key trends

“As consumers strive to get more protein in their diet across all meal occasions, they are looking for new and more interesting ways to do this”



In-store merchandising

As the bakery category has evolved, particularly with the rapid growth of bakery occasions, it has become more congested and difficult for consumers to cut through the noise, says Warburtons' Bebbington. "Retailers need to strike the right balance between choice and ease of shop by spotlighting preferred brands and expanding on innovation and growth areas, while removing duplication in declining sectors and improving the customer experience. Cross-category merchandising is also a great opportunity to engage shoppers by giving meal

inspiration and tapping into new meal occasions. Breakfast is a great opportunity to do this, linking bakery with categories such as preserves and spreads to create exciting feature space in-store."

Dole's Roberts agrees that cross-merchandising of products that will be consumed together creates an 'impulse' opportunity in a more planned category, thus driving up basket spend and shopper satisfaction.

To maximise sales, however, retailers should ensure they have a good selection of healthy and reasonably priced breakfast options, which are well merchandised, easy to

find in-store and with at least some of them chilled and ready for consumption, he says.

Based on research and customer feedback, Linwoods sees a strong demand for a dedicated in-store location showcasing healthy breakfast options, observes Woods. "This aligns with the growing focus on nutrient-dense foods and consumers' shopping by meal occasion," he says. "Similar to established sections like kids' cereal, a designated 'Healthy Breakfast' zone would cater to this evolving need and go beyond temporary season themes. This section should become a permanent

fixture, offering clear navigation to shoppers seeking genuinely nutritious and function breakfast solutions during their regular shopping trips."

Of course, HFSS legislation has also had an impact on the category, with brands innovating or reformulating to meet this. "Our research suggests consumers prioritise health at the beginning of the day," adds Woods. "Through innovation and reformulated products, shoppers are able to have that choice. Health, taste and convenience are key drivers at breakfast and HFSS legislation has meant brands are closer to meeting those needs."

and will be expanding its product offering to bring more sweet bagels to supermarket shelves in April this year.

Of course value has different meanings to different consumers, especially in challenging times, notes Mondelez International's Nash. "While price remains important, with 71% of shoppers claiming total price has become important to them in the last six months³⁰, value is more than just price," she says. "Value encompasses a range of factors, such as time, quality, gift worthiness, experience and reward. So, though value is – and will continue to be – important for shoppers, they are prepared to balance these elements across their total needs, rather than focusing simply on price."

Despite the recently negative performance of leading cereal brands, as highlighted in a Grocer article³¹, market forecasts suggest that the breakfast & brunch opportunity in the UK will continue to grow. Statista

Market Forecast predictions³² foresee the breakfast cereals market in the UK increasing by 11.65% between 2024 and 2028, with user penetration 11.2% in 2024 and expected to hit 13.9% by 2029.

Beyond this, however, "increased globalisation and therefore increased exposure to various cuisines from around the world" are likely to have an influence on the direction and development of the market going forward, says Linwoods' Woods. "Also, restaurant industry innovation will see constantly developing menus, incorporating international flavours and into their breakfast and brunch offerings to cater to evolving consumer preferences," he says. This, in turn, is likely to influence the options available in the retail sector.

Overall, therefore, it seems that the breakfast canvas on which consumers are painting their days is likely to be increasingly colourful throughout 2024 and beyond.

Sources

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- ⁴ Kantar Usage Panel, In-Home and Carried Out Breakfast Occasions, 52 w/e 26.11.23
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- ⁶ See 4
- ⁷ Kantar Worldpanel, data to September 2021
- ⁸ Nielsen IQ Scantrack data ending 30.12.23
- ⁹ Warburtons internal sales
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- ¹⁹⁺²⁰ IGD Shopper Vista, July 2022
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Favoured flavours

- ⁱ As defined by Nielsen
- ⁱⁱ Kerry 2023, Taste and Nutrition Charts Europe: <https://explore.kerry.com/2023-taste-charts>

Dole Packaged Foods Europe

Healthy, well-priced options

DETAILS

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KEY BRANDS

Dole Fruit in Juice cups
 Dole Tropical Gold Pineapple Slice cans
 Dole Tropical Gold Pineapple Chunk cans
 Dole Tropical Gold Tropical Fruit cans

➔ Data from Mintel shows that fruit is the fourth most popular food to be eaten at breakfast¹, after cereal, bakery and porridge. “Consumers are increasingly looking for breakfast items which are not only easy to prepare and healthy, but also convenient and can be consumed on the go,” says Gareth Roberts, UK country sales manager at Dole. “This is where Dole’s fruit in juice cups range can really come into play, as they can be enjoyed while sitting around the breakfast table on their own or as a topping on yoghurt, cereal or porridge, but also as a snack on the way to work or at your desk.”

Unsurprisingly, healthiness is high on consumers’ radars, with 36% of breakfast eaters over the last 12 months² saying health reasons have prompted them to change what they have for breakfast. “That’s just one of the reasons why, towards the end of last year, we announced an exciting redesign across our fruit in juice range,” explains Roberts. “The newly designed packs now feature clear ‘no added sugar’ and ‘vegan friendly’ messages to reassure consumers that they will be eating something which is both delicious and healthy. Finally, as further evidence of the growing popularity of fruit, our latest data shows sales of Dole’s fruit in juice cups to be up by 25.6%³ in the last 52 weeks.

The advantages of ambient

“We can’t ignore the current cost-of-living crisis, which continues to impact consumers’ shopping behaviours, encouraging them to be more conscious of product value for money, incorporating quality, waste, convenience and choice, which is where ambient products can have a role to play,” he adds. “While fresh fruit can come at a premium price, shoppers now understand that ambient goods not only offer good value and have longer shelf lives, but in the case of our Dole packaged fruit range, can also be one of your five-a-day and a healthy part of their overall diet. So, while some breakfast products may have risen significantly in price over the last 12 months, consumers can buy a four-



“Healthiness is high on consumers’ radars, with 36% of breakfast eaters over the last 12 months², saying health reasons have prompted them to change what they have for breakfast”

pack of Dole’s fruit in juice cups for just £2.29 or our 227g small pineapple chunks can for just £1, both of which offer a great tasting and healthy product at a price most can afford.”

To maximise sales retailers should ensure they have a good selection of healthy and reasonably priced breakfast options, which are well merchandised, easy to find, and with at least some of them chilled and ready for consumption, notes Roberts. “Our main breakfast focuses are our recently launched 227g cans, which offer exceptional value at just £1, and our 198g fruit cups, which are also priced at £1 and are the perfect portable and healthy breakfast snack,” he says. “Ideally suited to the chiller, the 198g fruit cups not only taste great, and have a shelf life of over 90 days which minimises waste, but also deliver all the health benefits of fresh on-the-go, and even come with a handy wooden toothpick to aid eating on the move.”

Source
^{1,2} Mintel – UK Breakfast Eating Habits, 2022
³ IRI MAT w/e 30.12.23

NEW



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*Pricing at discretion of retailer

Koko Dairy Free

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DETAILS

First Grade International Ltd
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KEY PRODUCTS

Koko Kids Free From Milk
Koko Barista Milk
Koko Original Milk
Koko Unsweetened Milk

Source

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- ³ Pawankar R, et al, 2013 and FoodAllergy.org
- ⁴ <https://tinyurl.com/5n8zpkpy>

“When dairy alternatives became popular with those who opted for a flexitarian diet, the category boomed with many brands (big and small) bringing a new offering for consumers,” says Victoria Eadon, marketing manager at Koko Dairy Free. “Now, amid the cost-of-living crisis, consumers’ habits have changed, with some flexitarians returning to dairy¹. However, vegan and allergy consumers still require dairy alternatives², and they are key to sustaining the category. “Data shows the number of children with allergies is on the rise³, and their parents are becoming more concerned about the ingredients given to them and the risk of other potential allergies⁴. So, there is a growth opportunity for allergen-free products for children, particularly those created without the 14 major allergens.

“Last year we launched our Koko Kids Free From Milk. Developed in consultation with leading dietitians,



“Our Koko Kids Free From Milk is low-sugar and packed full of vitamins and minerals”

this low-sugar milk alternative is aimed at children aged 1 and upwards.

“Recognising parents’ concerns, we conduct rigorous allergen testing and compliance, and will continue to do additional due diligence. Our Koko Kids Milk is also packed full of vitamins and minerals, so that children gain similar nutritional benefits to dairy milk, while still tasting delicious and creamy.”

NO DAIRY
NO SOYA
JUST PLANTS



Peperami



A protein-kick to pep up snacking

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KEY BRANDS

Peperami
– Singles, Multipack
& Lunchbox Minis
Chicken Bites
Pizza Buns
Vegearami
Snackbox
Tapas

➔ Peperami is the UK's No.1 chilled meat snack¹. “The chilled meat snacks category has doubled in sales value over the last five years led by best-selling Peperami which is now a £120m brand²,” says David Harriman, LSI country director UKI.

Animal magic

“Peperami is famous for its distinctive great taste, instantly recognisable green packs and its iconic brand character the ‘Animal’. Driving category growth is important to Peperami and, in April, the brand is launching a heavyweight TV advertising and marketing campaign featuring ‘Animal’ to drive this,” he reveals.

“Peperami is especially popular with families who enjoy a convenient, tasty protein-kick to pep up snacking,” adds Harriman. “Peperami multipacks of five-sticks, made from 100% pork, offer four flavours – Original, Hot, Firestick and Chorizo.

“The brand’s success has been fuelled by innovation with the launch of Pizza Buns and Chicken Bites driving significant incremental category growth. Pizza Buns (original & hot), made with bread, provide a more filling snack, while Chicken Bites (roasted & tikka) extend the choice of protein. Available in multi-packs of 4 and singles, shoppers can easily find them in back-of-store chillers or they can be sited in food-to-go; these placings are essential to ensure retailers do not miss this fast-growing sales opportunity.”

Source
^{1,2}Nielsen, Value Sales, MAT to Jan 2024



NO.1 CHILLED MEAT SNACKS BRAND

¹Nielsen MAT Jan 2024

Linwoods Health Foods

Fuelling healthy mornings

DETAILS

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KEY BRANDS

- Linwoods
- Overnight Oats
- Cold Milled Flaxseed
- Chia Seeds
- Hemp Seeds

 Armagh-based seed leader Linwoods Health Foods has applied its health expertise to launch a plant-based, convenient breakfast solution for busy professionals and households. “Already powering 66m breakfasts in 2023, we have expanded our reach with an Overnight Oats range that consumers love and have won over Ireland’s leading influencers, athletes, and online personalities,” says the company. “This exciting launch of Linwoods Overnight Oats brings our deep-rooted health knowledge to a new category, offering a convenient, nutritious, and flavour-packed solution for today’s busy, health-conscious consumers.”

Launched online in November 2023, Linwoods Overnight Oats are rapidly expanding their reach across the UK & Ireland with distribution growing fast, it says. Notably, Northern Ireland’s convenience market pioneered the in-store launch and has been met with phenomenal demand.

Packed with plant-based power from gluten-free oats, chia seeds and added vitamins and minerals, the range comes in three delicious flavours:

- Protein Chocolate – high in plant-based protein for muscle growth, and magnesium to combat tiredness and fatigue and support muscle function;
- Energy Strawberry – delivers energy-supporting nutrients through vitamins B6 and B12. These B vitamins support energy-yielding metabolism and tiredness reduction;
- Energy Original – which gives



“The launch of Linwoods Overnight Oats brings our deep-rooted health knowledge to a new category, offering a convenient, nutritious and flavour-packed solution for today’s busy health-conscious consumers”

consumers the option to customise their oats with whatever toppings they prefer while also adding those energy-supporting B Vitamins into their diet.

“The oats are effortless to prepare, with the simple 3-step process: soak; chill; and enjoy,” says the company.

Fuelling active lifestyles with every spoonful, Linwoods Overnight Oats boast a powerful combination of functional benefits and unmatched taste, it adds. “But here’s the secret weapon: 98% of consumers rave about the delicious flavour¹, ensuring shelf standout and repeat purchases.

“The ‘Great Days Start Here’ tagline resonates deeply with young professionals seeking healthy yet convenient breakfast solutions. Linwoods capitalises on this growing demand, addressing the trend for plant-based, functional foods and time-saving options. Its position in the health food market, further strengthens brand recognition and consumer trust.”

Partnering with Linwoods offers a wealth of benefits, it notes. “Stand out from the competition with a unique, innovative breakfast solution, tap into the booming demand for convenient and healthy options, and leverage Linwoods’ brand strength and consumer appeal to boost sales and profitability.

“Hungry for growth? Shake up your breakfast offering and see how Linwoods Overnight Oats can transform your cereal aisle to drive footfall and sales.”



Source
¹ Meta (Facebook & Instagram, Nov 2023-Jan2024), based on 500 customer feedback/reviews

WAKEY, WAKEY!

NEW



Boost your shoppers
breakfast with an
**OVERNIGHT
SENSATION**



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Mondelez International

Meeting on-the-go occasions

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Trebtor
Maynards Bassetts
Halls
belVita
Cadbury Biscuits
Mikado
Toblerone
OREO
Ritz
Barney

Consumer choice will remain crucial within the breakfast and brunch occasion this year, offering every consumer a product to suit their taste and demands – whether that's through healthier¹ options or more indulgent treats, says Susan Nash, trade communications manager at Mondelez International.

“belVita and Cadbury Brunch offer shoppers delicious on-the-go options for busy mornings and beyond,” she notes.

Positive energy

“We can anticipate that breakfast and brunch options which 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 cover both take-home and on-the-go missions to meet all potential need states and occasions,” says Nash. “belVita, the UK's No.1 healthier¹ biscuit brand², offers a proposition of ‘Positive Energy Starts Here’ with a recipe comprising five different wholegrains, combining taste and nutrition.”

Variety of options

For shoppers looking for the iconic taste of Cadbury in their mid-morning snack, Cadbury Brunch Oat Bars are available in Chocolate Chip, Raisin, Bournville, and Peanut options, and the range has seen strong growth of 12% over the course of 2023³, reveals Nash.

Meanwhile, the belVita range also



“belVita and Cadbury Brunch offer shoppers delicious on-the-go options for busy mornings and beyond”

offers a host of delicious flavours and textures, including non-HFSS recipes. With the highest scores in taste credentials within its category⁴, belVita offers the ideal combination of taste and nutrition, she notes.

Healthier choices

Health is absolutely a key trend, as recent research has shown that 71%⁵ of consumers have said that incorporating healthier and more nutritious foods into their diet is extremely important to them, adds Nash.

“To meet this demand for healthier snacking, belVita has introduced the Baked Bar range, including the Dark Chocolate & Hazelnut and Dark Chocolate & Orange variants, which offer a delicious snack to keep you going, no matter the time of day,” she says.

“What’s more, belVita’s non-HFSS range last year increased once again with new additions. The latest non-HFSS belVita Soft Bakes in Blueberry and Golden Oats flavours have provided further choice for shoppers looking to make healthier choices in their day-to-day lives, while still providing the great taste they love.”



Source

- ¹ Healthier* As defined by Nielsen
- ² Nielsen IQ, Total Coverage incl. Discounters, 52 w/e 28.10.23
- ³ Nielsen Value Sales, MAT w/e 29.07.23
- ⁴ Healthier Biscuits EDD, 02.22
- ⁵ NielsenIQ Homescan Survey, April 2022

For Healthier* Sales

belVita

**EXTENDED
NON-HFSS RANGE**



**NO.1 BREAKFAST
BISCUITS****

Cadbury
Brunch

**LOADS OF OATS
AND NUTS. BUT
ACTUALLY TASTY**



**WITH THE
NO.1 HEALTHIER
BISCUIT SKU****

belVita

**FOR BEYOND
BREAKFAST**



**NO.1 HEALTHIER
BISCUIT BRAND****

Mondelēz
International

SNACKING MADE RIGHT

New York Bakery Co.

Authenticity and quality

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KEY BRANDS

New York Bakery Co.
– Bagels
– Bagel Thins
– Gluten Free Bagels

At a time when pressure on shoppers' wallets shows no sign of easing, brands need to have a laser focus on adding value. This flows from understanding consumer wants and needs, says Christina Honigfort, marketing & insights director at Grupo Bimbo UK, owner of New York Bakery Co. "For many consumers, return on investment plays a key part in their purchasing decisions," she says.

Leaning into trends to keep options fresh and exciting for shoppers, while ensuring great value for money combined with unmatched authenticity and quality, is key to capturing attention in the breakfast and brunch market, she notes. That's why, within the breakfast sector, bagel penetration is increasing, with the number of ambient bagel purchasers growing year on year¹. In fact, bagel sales are out-performing the wider breakfast category² (+4.1% volume YOY vs -0.1% volume YOY).

Dominating the UK bagel sector

"Within the bagel category, New York Bakery Co. continues to add value as the UK's bagel category leader, commanding a remarkable 53% volume share and 54% value share³," reveals Honigfort. "The brand has maintained this growth through its strategic focus on its famous New York bagel heartland, which features much-loved flavours from The Original to Cinnamon & Raisin, alongside stand-out new products such as Limited Edition Cookies N' Cream," she says. "Authentically boiled and baked – just like in New York – the range is delightfully dense, chewy, packed with flavour and immensely satisfying for consumers."

Delivering an unmatched authentic and high-quality bagel experience is a message delivered via an equally strong focus on the brand's essence, 'New York or Nothin', adds Honigfort. "This brings the fun, bold and confident nature of the brand to life, landing its belief that anything other than a New York bagel isn't even a bagel. This meets consumer demand for authentic food experiences and separates the New York Bakery Co. from its competitors at fixture."



“Leaning into trends to keep options fresh and exciting for shoppers, while ensuring great value for money combined with unmatched authenticity and quality, is key to capturing attention in the breakfast and brunch market”

Leading the innovation charge

The brand's focus on its bagel heartland extends to a continued investment in innovation. In September 2023, it pushed flavour boundaries and delivered further category growth with the launch of Limited Edition Cookies N' Cream Bagels.

"In a category first, the limited-edition bagels combine an iconic American flavour with the expertise of the UK's top bagel brand, delivering a chewy texture and a delectably sweet vanilla undertone, generously infused with rich cocoa cookie pieces," notes Honigfort. "This launch was a game-changer for bagels," she says. "The flavour idea emerged in response to growing demand for permissible treats, aligning with the rising 'treat mentality' during the cost-of-living crisis."

The introduction of these bagels followed a strong year for New York Bakery Co., delivering £623k RSV since launch, and a strong over-index with young family shoppers⁴. "Investing in innovation to strengthen the brand's bagel heartland and further drive its 'New York or Nothin' essence will continue to be a key strategic focus," she concludes. "Watch this space as the next rotating limited-edition flavour will be revealed this April."

Source

^{1,2} Kantar, Total Market, Total Pack/Format, Total Flavours, 52 w/e 21.01.24
³ IRI, Total Grocery Market, 52 w/e 27.01.24
⁴ IRI, Total Market, 52 w/e 27.01.24

IF IT'S NOT
NEW YORK,
IT'S JUST A
**ROLL WITH
A HOLE**



NEW YORK OR NOTHIN'

United Food Brands

Waffles and more in 2024

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KEY BRANDS

Waffle Amour
Mars & Milky Way
Croissants

United Food Brands is the UK's No.1 Belgium Waffle supplier with a 76%¹ branded market share within the grocery muls and sales up 25% YOY². In 2023 the business attained new listings and increased distribution across its various waffle brands, and the sector shows no signs of slowing down in 2024 with the company's waffle sales up 32% so far this year³.

“Our flagship brand, Waffle Amour, is widely listed across the multiples and remains the first-choice Belgian waffle brand in the UK with a 23%⁴ market share and growing 20% YOY⁵,” says managing director Richard Reeves. “Our reach is quite unrivalled; in addition to Waffle Amour, we supply exclusive brands and own label to the grocery muls and will further extend this in Q2 with new listings and distribution increases coming through.”

Although the food industry is still navigating through a challenging cost-of-living environment, consumers are more savvy now and, by offering premiumisation to the category while still being perceived as excellent value, Waffle Amour has successfully bucked several trends with increasing volume and value sales, notes Reeves.

“Through our timeless Belgian recipe dating back to the 18th century, as well as traditional production methods, our brand communicates authenticity and provenance, and this clearly resonates with consumers. Within breakfast, the waffle and wider morning goods sector will continue to grow this year as shoppers seek more choice during breakfast occasions and on-the-go.”

Despite the recent HFSS regulations the company's recipe remains



“Our flagship brand, Waffle Amour, is widely listed across the multiples and remains the first-choice Belgian waffle brand in the UK, with a 23% market share⁴”

unchanged, as it believes consumers do not want to compromise on the experience and quality of its waffles. “After all, they are an indulgent treat, and we encourage consumers to elevate their breakfast, so that they can enjoy restaurant-quality food wherever they are,” says Reeves. “One of the key drivers in our waffles’ success is their versatility, as they offer an abundance of meal occasions and formats. The majority of consumers prefer waffles as a sweet and indulgent breakfast with fruits, or on-the-go, but data shows that they are now exploring the savoury routes too, such as topping our waffles with bacon and egg for an American-style breakfast.

“As for 2024, we will continue to focus on our core range and build on the gains seen in 2023, but we are also excited about our stream of NPD ahead and a new listing for our Mini Waffle range in one of the grocery muls this May.

“Beyond waffles, we are expanding into the morning goods category with the launch of two licensed Mars and Milky Way multipack filled croissants and have listings lined up in four of the grocery muls. This is an exciting first step for the business and the feedback from retailers and consumers has been fantastic so far.”



Source

- ¹ Nielsen, Total Category Value Sales, L4 w/e 27.01.24
- ² UFB Internal Data Value Sales L52 w/e 12.12.23
- ³ UFB Internal Data Value Sales L4 w/e 29.02.23
- ⁴ Nielsen, Total Category Value Sales, L4 w/e 27.01.24
- ⁵ See 3

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Nielsen Total Category Value Sales L4 wks 27/01/24*

Warburtons

Better breakfasts with bakery

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 Sales Director

KEY BRANDS

- Warburtons**
- Bread & Rolls
 - Bagels
 - Thin Bagels
 - Crumpets
 - Crumpet Thins
 - Fruit Loaves & Teacakes
 - Naan Breads
 - Pancakes, Potato Cakes & Muffins
 - Pittas
 - Sandwich Thins

➔ Breakfast has long been thought of as the most important meal of the day, and bakery offers consumers a broad range of products that can make it also one of the most exciting, says Colin Bebbington, Warburtons sales director. “Traditionally, toast was top of the list in bakery for breakfast and is still incredibly popular as the wrapped bread category continues to be as resilient as ever, with 99% of British households still buying over 30m loaves of sliced, wrapped bread each week¹. However, bakery occasions is where the real excitement lies for breakfast lovers, offering them a real variety of products to make healthy, or indulgent meals.

“The bakery occasions category is now one of the biggest long-term growth drivers across all of grocery²,” he says. “In fact, sales of bakery occasions products, driven by big breakfast and brunch favourites such as crumpets, bagels, muffins and pancakes now outweigh sales of wrapped bread³. This is driven by consumers’ desire to make mealtimes more interesting.

“Warburtons, well regarded as Britain’s No.1 bakery brand⁴, is now also the No.1 brand in bakery occasions⁵ due to its commitment to innovating and investing in high-quality products consumers are looking for. Already brand leader in crumpets and thin bagels⁶, Warburtons has launched several new products over the last 12 months including extending its Thin Bagel range with Big 21 Seeds & Grains and adding Crumpet Thins to its crumpet family.”

Health remains a key trend that continues to influence consumers’ choices at all mealtimes, including breakfast, and the demand for protein-rich products is perhaps the standout focus for consumers at the moment, notes Bebbington. With one in four shoppers now interested in the protein content of bakery products⁷, innovating to meet this need with products that are versatile for all mealtimes is a top priority, he says. “Our protein range has been in hot demand with volume sales of our Protein Thin Bagels up 56%⁸.

In early 2024, Warburtons extended its protein range to include an exciting



“The bakery occasions category is now one of the biggest long-term growth drivers across all of grocery²”

new 800g loaf – Protein Power – to give consumers looking for quality bakery breakfast choices that are high in protein, even more options.

“Bakery is booming at breakfast as consumers look to ramp up their meals and seek out healthier or more indulgent options,” adds Bebbington. “There is no doubt that wrapped bread plays a part in this, with more premium loaves such as our Soft Tiger Bloomer offering a great way to make a basic breakfast more interesting. But the real excitement for consumers comes from the array of bakery occasions products available.

“Innovation is therefore essential for success, and we are always looking at how we can delight consumers with new, exciting breakfast products to keep them shopping in the bakery aisle. However, consumers are also looking for products that don’t compromise on quality, which is why they look to brands such as ours to give them the quality they seek.”

Source

¹⁻⁶ NielsenIQ Scantrack, Total Coverage including Discounters, Unit Sales, 52 w/e 27.01.24
⁷ You Gov survey, June 2023, 2041 respondents (Nat Rep)
⁸ NielsenIQ Scantrack, Total Coverage including Discounters, Unit Sales, 12 w/e 27.01.24

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2

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3



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4



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5



**SEEDED BATCH
800G**

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6



**ORIGINAL
THIN BAGELS**

No.1 for thin bagels*

7



**TIGER
BLOOMER 600G**

No. 1 bloomer in the market*

8



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