

# Bread & baked goods



# HOVIS®



As good today as it's always been





## Hovis

# Inspired by premium demand

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**Hovis Best of Both**  
**Hovis Wholemeal**  
**Hovis Seed Sensations**  
**Hovis Granary**  
**Hovis Bakers Since 1886**

With the total pre-packaged bloomers sub-category now worth £50m (49.5m) and showing value growth of 11.6%<sup>1</sup>, shopper demand for premium, artisanal-inspired products continues to rise.

Alistair Gaunt, commercial director at Hovis, explains how the iconic 137-year-old British bakery brand is directly tapping into this growing trend and providing retailers with the perfect products to drive sales in their stores through its latest innovation.

“At Hovis, our passion for preserving tradition while embracing innovation has led us to make another exciting move into the realm of artisanal-inspired bread with the launch of the Hovis Bakers Since 1886 Rustic Bloomers range,” he says. “The new range marks another significant step in Hovis’ journey towards providing premium, authentic loaves that help redefine the essence of pre-packaged premium bread.”

### Quality and authenticity

Available to buy now at an MRSP of £1.90, the Hovis Bakers Since 1886 Rustic Bloomers collection includes the Rustic White Bloomer and Rustic Seeded Bloomer, explains Gaunt.

“With Hovis’ rich heritage, dating back to 1886, these Rustic Bloomers promise quality and authenticity, appealing to today’s discerning consumers seeking unique, top-tier bakery selections,” he says.

“Developed using traditional sponge and dough methods, and slow fermentation, the bloomer range of breads offers enhanced flavour complexity and a soft texture.

“Unlike conventional bloomers available on the market, Hovis’ 1886 Rustic Bloomers are baked in shallow trays, helping to yield an



“The new range marks another significant step in Hovis’ journey toward providing premium authentic loaves that help redefine the essence of pre-packaged bread”

unmistakably traditional tapered and rounded shape with thick slices, generous end crusts and four distinctive diagonal cuts for a truly artisanal-inspired experience. This innovation helps to bring the charm and authenticity of independent bakery experiences directly to shopping aisles.”

The 550g Hovis Bakers Since 1886 Rustic Bloomer loaves are available in White and Seeded, with the latter including Sunflower Seeds, Poppy Seeds, Millet Seeds and Golden Linseed for a deliciously rich, nutty finish, he notes.

“These loaves are a testament to our team and their dedication to innovation and ongoing delivery of authentic, high-quality, delicious bakery products.

“Our extended Hovis Bakers Since 1886 artisanal-inspired range, as well as our ever-popular core Hovis range of sliced loaves means that we continue to offer an exciting, tasty and relevant range to a wide variety of shoppers with differing needs and budgets.”



### Source

<sup>1</sup> NIQ Scantrack, total coverage, incl. discounters, total pre-packaged loaves with ‘bloomer’ in variant name, 52 w/e 15.07.23 vs previous year



## Analysis



# Rising to the occasion

## Despite a challenging year, occasion-led options continue to attract bread & bakery shoppers

↙ Diversification and a focus on bakery occasions are helping bread & baked goods suppliers ride out the current financial storm in the UK, as consumers continue to invest in bakery staples and seek out more unusual items for variety, hosting and self-treating. However, the market has not been without its challenges.

Overall wrapped bakery volume is flat year-on-year<sup>1</sup>, despite research showing that the squeeze on living standards has not diminished strong underlying demand for bakery products, says Emma Eggleton, head of marketing at Allied Bakeries. “The long-term trend of some shoppers switching from bread to alternatives

such as rolls, wraps and bagels continues, as consumers seek more variety,” she reports. “On price, the past 12 months have been challenging across all bakery supply chains and while we have seen some markets soften since the highs linked to the war in Ukraine, we have also not seen them return to previous levels.”

With seven consecutive months of double-digit inflation at the start of FY 2022/23, putting real pressure on household incomes, bread and bakery is one of the many categories that has seen own-label gain share as shoppers seek to trade down to lower price points, she adds. “That said, there is still strong demand for branded products.”

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## Analysis

At topline level, unit sales of pre-packaged sliced bread have fallen by -2% over the latest year<sup>2</sup> but this headline figure masks what is going on in the category, says Alistair Gaunt, commercial director at Hovis. “In the last 12 months, over 867.6m loaves of pre-packaged white bread have been sold<sup>3</sup>, up 1.4% vs the previous year<sup>4</sup>,” he says. “This means the actual number of white bread loaves sold is at the highest level for the last five years<sup>5</sup> and now accounts for 57% of the loaves sold<sup>6</sup>.”

Breads with bits (seeds and grains) remains the second-largest category in the pre-packaged sliced bread market, followed by brown/wholemeal<sup>7</sup>, reveals Gaunt. Inflation has taken its toll, however, as the average price of a loaf of pre-packaged sliced bread has increased by 16.5%<sup>8</sup> over the year and shoppers have been buying fewer loaves to help them manage overall spend<sup>9</sup>.

Hannah Sibley, product & innovation director at Aryzta UK & Ireland, says total in-store bakery (ISB) sales are up by almost 14%<sup>10</sup> on last year, with unit sales remaining relatively steady (-0.6%)<sup>11</sup>. Within this, growth has largely been driven by sweet products (+16%)<sup>12</sup>, but she notes that bread is also in double-digit growth (+12%)<sup>13</sup>.

In terms of bread, speciality loaves now account for 22% of value sales<sup>14</sup>, while French bread has a 23% share (up from 21% last year)<sup>15</sup>, she adds. With price inflation in the category, volume sales of all bread have seen a decline in units, but recently, speciality loaves have moved back into growth and full baguettes are in unit growth of 5%<sup>16</sup>.

Referring to morning goods, Christina Honigfort, marketing & insights director at New York Bakery Co (NYBCo), says this sector has shown strong growth in breakfast consumption over the past four years (+25%) vs other categories like total cereals (+1%), total bread (-3%) and total yogurt (+7%)<sup>17</sup>. Bagels, as a core breakfast staple, have continued to be relevant to consumers, thanks to over-indexing in terms of enjoyment and practicality, with volume remaining buoyant despite increases in the price of goods<sup>18</sup>, she notes.

However, in the ever-changing bakery landscape, brands need to ensure they deliver high-quality products to encourage consumer loyalty, as well as an exciting innovation pipeline to recruit new customers, she says.

“By understanding market trends, articulating consumer insights and translating these insights into new product range offerings, brands can capture the attention of shoppers, even in financially difficult times,” she adds.

Premiumisation in the bakery sector has continued to thrive because it’s a relatively low-value category, points out St Pierre Groupe UK sales director Rachel Wells. “Consumers are spending more wisely, but that doesn’t always mean spending less,” she says. “Consumers know that consistent quality that elevates a meal to restaurant quality is worth it, especially when the additional cost is a pound or less.”

She reveals the brioche category across the board is worth almost £97m in the UK, up 39% in the last 52 weeks<sup>19</sup>.

At Warburtons, sales director Colin Bebbington believes bakery occasions have driven growth, with bakery one of the last places consumers choose to make changes, even while looking for ways to save on their weekly shop. Instead, they are seeking out exciting meal options such as crumpets, pittas, bagels, naans and thins. “The growth in bakery occasions is a long-term trend, with volumes 20% higher than pre-Covid<sup>20</sup>,” he reveals.

“While private label continues to do well, it is by no means at the expense of our branded growth,” he adds. “In bakery, the quality of the products remains key to decision-making with shoppers and this is perhaps why we have seen the highest level of branded growth in the bakery occasions sector than in any other fresh category. It also shows shoppers’ desire to try and buy new, exciting meal options and therefore why brands need to innovate to woo shoppers.”

At Finsbury Food Group, Daryl Newlands, head of brands & marketing, says it’s no real surprise that own-label products are thriving in a market where consumers are feeling the economic pressure, as they offer a budget-friendly option. “However, recognised brands will always play a vital role in-aisle for a variety of reasons, including building consumer trust and evoking an emotional connection,” he notes. Despite the economic challenges posed by increasing commodity prices, disrupted supply chains and soaring energy prices, the cake market saw year-on-year growth of 7.7%<sup>21</sup> and the bread market grew by 1.7%<sup>22</sup>, he adds.



### Market trends

Mid-range loaves are feeling the squeeze as both the value (+3.6%) and speciality tiers (+17%) of bread remain in strong growth<sup>23</sup>, says Allied’s Eggleton. This is driven, in particular, by sourdough and rye. Seeded bread, although in short-term decline is now the second-largest sector in bread, with forecast long-term growth over the next three years<sup>24</sup> as the cost-of-living burden eases. Meanwhile, for rolls, consumers are switching out of in-store bakery options to bought-in as they seek the extra convenience and value of greater shelf-life.

Premiumisation is driving increased sales for retailers in bread and rolls, says St Pierre Groupe’s Wells. In fact, growth in rolls is driving the category forwards both in terms of innovation and sector spend. She notes that the company’s brioche provide “an easy





# 867.6m

Pre-packaged white bread loaves sold in last 12 months<sup>3</sup>

*Nielsen IQ*

# +14%

Rise in in-store bakery sales over the year<sup>11</sup>

*Circana*

# £97m

Value of the brioche category across the UK<sup>19</sup>

*IRI*

# +7.7%

Growth of the cake market year-on-year<sup>21</sup>

*IRI*

way to elevate everyday meals and the way we communicate the brand through marketing in-store and merchandising means consumers are choosing to trade up. In turn, that drives incremental sales in other areas of the store because shoppers trading up on their bread carrier are more likely to spend a little more on accompanying purchases like meats and cheeses.”

At Aryzta, however, Sibley says innovation isn’t just about the latest trends or flavours. “We’ve got to understand how the environment is changing and ensure we’ve got the right products to help our customers create a first-class ISB environment,” she notes. Aryzta has created a range of “next-generation baguettes” that use less energy to bake in-store, but still provide consumers with the “same great eating experiences they expect”, she says.

Although there is always a quest to find the next big thing, it can sometimes be about making the most of what we have now, adds Sibley. For example, sourdough has been seeing strong growth and... currently accounts for over 40% of value sales in speciality loaves<sup>25</sup>.

Mark Frossell, senior national account manager at St Pierre Groupe, points to food waste being a perennial problem for retailers, but particularly challenging in bakery. “It’s also a conversation being had more frequently by shoppers too, with consumers more aware than ever of the environmental impact of food waste,” he says, noting that Baker Street’s extended shelf-life helps retailers navigate wastage and appeals to consumers making an effort to reduce their own food waste.

Hovis’ Gaunt agrees that looking to

reduce food waste is another strategy consumers can use to help save money on their grocery shopping. “Shoppers are buying fewer different types of bread for their households and are increasingly moving towards pre-packaged white bread<sup>26</sup>, which can often be the cheapest loaf and most likely to satisfy the needs of multiple people,” he says. To respond to this shift, the company launched its Hovis Soft White 400g Half Loaf this year.

Health and wellness, as well as great taste, continue to play a key role in helping shoppers decide what to eat, he adds, pointing to Hovis’ Wholemeal with its ‘high in fibre’ claim, and Hovis Best of Both, which combines the taste of white bread with wholemeal, being “a source of fibre and rich in calcium”.

Healthier products remain as important in bakery as ever as



## Analysis

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, reports Warburtons' Bebbington. Having seen a volume sales rise of 53% for its Protein Thin Bagels<sup>27</sup>, the company plans to capitalise on the protein trend by launching a new loaf – Protein Power – early in 2024, he reveals

Health is a topic always found on the bakery agenda, says St Pierre Groupe's Frossell, and Baker Street's range of rye breads have benefited from the demand for healthy alternatives, with its Seeded Rye up 81% on last year and Rye & Wheat up 16%<sup>28</sup> thanks to new listings with UK retailers.

Trends currently shaping the sector, including sourdough and gut health, plant-based living and natural, cleaner products, will continue to play out moving forwards, says La Lorraine Bakery Group (LLBG) marketing manager Rebecca Calveley. "As consumers continue to demand greater varieties of bread, including ethnic bread as well as wholemeal breads with oats, bran and seeds, etc, this will open up many more opportunities for retailers to expand their bread range to incorporate new and exciting flavours and ingredients.

"Gut health is a key focus area for consumers as they keep a closer eye on what they are eating," she adds. "Gut health and sourdough go hand in hand, as sourdough fermented breads stand out for their digestibility. Some 85% of consumers say fibres have a positive impact on digestion<sup>29</sup>, so bakers offering wholegrain breads, for instance, are winning in the bakery field."

Moreover, the popularity of global bakery products is still growing, she notes. "From Spanish barra to American-style buns for gourmet burgers, retailers have access to a host of global premium products available within LLBG's Panesco range. In addition, its Schiacciata Romana Multigrain and White pre-sliced breads, a type of focaccia featuring a real mix of wholewheat, rye flour, spelt, extra virgin oil and millet, linseeds and sunflower seeds, is proving hugely popular with consumers, she adds.

Beyond the health factors and as consumers are consistently making tough decisions on where money



is spent, many are looking to treat themselves during everyday, family moments, says NYBCo's Honigfort. She says the morning goods category has seen growth thanks to capitalising on the tasty and convenient elements of subcategories like bagels or croissants that tap into permissible treating<sup>30</sup>. "Breakfast occasions have also seen 2.4% growth since March 2020 and are now the least skipped meal of the day<sup>31</sup>," she says. "Moreover, breakfast is the largest in-home occasion of the day, making it even more crucial that retailers offer exciting options for consumers to enjoy every morning."

### In-store challenge and opportunity

High in fat, sugar and salt (HFSS) restrictions have posed a challenge to retailers to keep aisle ends fresh, with one-third of best-selling lines in morning goods no longer able to be promoted on secondary space, limiting rotation of brands and ranges, says Allied's Eggleton. "The restrictions are causing a rethink for all of us about how we effectively communicate to

consumers in-store. Similarly, certain aspects of the category have seen a strong move to premiumisation, but we need to think about how to better differentiate premium vs core at the fixture [as] there is an opportunity for retailers to drive real interest and inspiration... including by creating occasion-led spaces."

Looking at the e-commerce arena, cross-category bundling online is much easier to execute and can bring together ambient, fresh, chilled and frozen products to promote unique occasion-driven purchases, whereas in-store this proves more challenging, she adds.

Aryzta's Sibley believes there is real opportunity to drive engagement in the category through inspiration at all touchpoints – not just in-store or in the online store, but also through social media. "Not only can this give extra visibility to new products, but it can also drive the sales of existing products, while also increasing basket spend and growth in other categories," she says.

Warburtons' Bebbington thinks that,





# Sweet styles and flavours in vogue

In recent years, Finsbury Food Group has witnessed the rise of flavours like caramelised biscuit, blonde chocolate, tropical, and salted caramel – and these can span a range of formats, like loaded snacking and brownie-based celebration cakes to mash-ups, such as blondies or cookies & cream, says Newlands. “The list is ever-changing and, for Finsbury Foods, it’s imperative we monitor these trends and capitalise on them. For example, using the hyperrealism trend, we developed a cake in the shape of an Xbox controller,

which has continually proven its success in the market.”

In 2024, he expects customisability and variation in flavours to be key drivers, citing towering skyscraper cakes, with multi-flavoured layers and various textures; DIY cakes built from brownies and donuts; and cocktail-inspired cakes, with flavours such as Piña Colada and Pornstar Martini.

He also envisages layered loaf cakes with vibrant colours and unique combos like pistachio-rose-raspberry to challenge traditional round cakes and says the influence of the

Paris Olympics could see brands looking at petite cakes with French twists to align with the event.

Whether through taste, texture, colour or sensation, people are interested in trying new sensory experiences, says LLBG’s Calveley. “Expect to see more bold flavours, colours, textures and innovative shapes across bakery. Look beyond traditional choices and opt for more unique and exotic flavours to make your product stand out.” The new trio of doughnuts from its Donut Worry Be Happy brand is a prime example, being

available in three variants – Orange & Passion Fruit, Crushed Candy, and Chocolate & Raspberry, she says.

New York Bakery Co is pushing innovation in the bagel sector with the launch of its latest Cookies N’ Cream variant. “With low confidence across the market, consumers are letting treat mentality guide their purchasing decisions and sweet bagels are in demand,” says Honigfort. “The innovation will not be stopping here: expect to see two new sweet flavours a year under our new Limited Editions range.”

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. “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 a great opportunity to engage shoppers by giving meal inspiration and tapping into new meal occasions,” he adds. “Our Soft Naans launch in August is a great example of this. Marketed alongside Indian ready meals, it helped us build penetration quickly in the market for this NPD.”

As consumer behaviour has evolved since the pandemic, retailers are facing more competition from local bakeries and food markets, as more consumers look to ‘shop local’, says LLBG’s Calveley. “Retailers can create a more authentic bakery feel to the in-store

bakery section, displaying products on quality cake stands and covers,” she says. In this way, they can blur the lines of what once was a duty to collect the food shop, making it feel like a pleasant experience to visit a quality food provider.

However, Hovis’ Gaunt notes that merchandising for ISB and pre-packaged bread is very different; ISB has differentiated fixtures that deliver fresh, artisan and premium cues that pre-packaged baker could and should also benefit from, he says. “We would recommend that stores enhance their pre-packaged products wherever possible – for example, clear signposting, cross-promoting with other favourites – to help provide inspiration for shoppers to create more special bread occasions.”

Bakery is a fantastic category in which to experiment with merchandising solutions, because shoppers are looking for and open to inspiration, says St Pierre Groupe’s Wells. The company has already demonstrated this in the US market, where it introduced its

Eiffel Tower racks more than six years ago and has been sharing its learnings with UK retail partners. “In Asda and Morrisons stores, we implemented Eiffel Tower racks to highlight our product authenticity, interrupt footfall to engage shoppers and ultimately increase sales,” she says. “In Asda, stores with an Eiffel Tower increased sales by 58%<sup>32</sup>.”

The company also trialled branded bays with Asda this year to further improve the shopper experience in-store, she adds. Where trialled, units per store, per week rose by 42%<sup>33</sup>.

## Future outlook

All things considered, bread & baked goods suppliers are feeling optimistic as 2024 approaches, sensing the opportunity that increased at-home entertaining will bring during the months ahead. However, it will be important for brands to continue to innovate, as consumers are having to consistently make tough decisions about where they spend their money, observes NYBCo’s Honigfort.

Christmas and Easter typically see a



## Analysis

spike in sales for bake-at-home ranges, says Hovis' Gaunt. "These are both key occasions when people will be staying at home, shopping less frequently for household groceries and looking for something a bit more special to enjoy when entertaining friends and family. Bake-at-home products provide the perfect solution for these occasions."

He also notes that next year will be a big one for sporting events such as the Euros 2024 in Germany and the Olympics and Paralympics in Paris in the summer, offering an opportunity for hot dog rolls and burger buns as consumers fire up barbecues.

Seasonal and limited-time offerings will generate interest in the ISB category during the Christmas period as consumers tend to indulge in festive treats and baked goods, says Aryzta's Sibley. The company has introduced two fresh sourdough loaves with a festive twist: a date, honey & walnut bloomer and a cranberry & pumpkin bloomer to cater to holiday season celebrations, she notes.

Baker Street is also bringing back its Christmas range of Stollen and cake truffles, with early indications that these are already selling well. "However, having looked at sales patterns over the past few years, there is a real opportunity for our year-round range of burger buns and hot dog rolls to meet demand over the festive season," says Frossell.

At St Pierre Groupe, products that encourage sharing or help hosts to impress guests will always appeal, but this is particularly true at Christmas, says Wells. Its Brioche Mini Buns, launched initially in Asda last year to cater to the trend for sharing plates, are now also available via Tesco and Morrisons stores, she notes, while its Chocolate Brioche Wreath is also available in Asda and Morrisons.

Bakery occasions present a real opportunity going forwards, says Warburtons' Bebbington. "While bread remains incredibly important it's clear that the growth area is in new and interesting bakery products and meeting this demand is key to success. Therefore, improving space allocated to bakery occasions products, such as pittas, crumpets and bagels is essential." Apart from that, he says there is an opportunity to make the most of emerging trends such as protein



and create new exciting products to delight consumers and drive demand.

Consumers are looking beyond bread and seeking to explore with sourdough croissants, brioches, muffins or bagels, agrees LLBG's Calveley. With an eye to health, she adds that plant-based eating and vegan sweet bakery products will also continue to drive growth, along with more artisanal breads and bakery products.

Consumers want natural and clean-label products, and suppliers also need to keep an eye on environmental credentials, as this has become "a hot topic" for retailers as consumers become more aware of the impact production has on the planet, she adds.

"The health-conscious trend has been shaping the UK market for years now, constantly adapting and growing," says Finsbury's Newlands. "This will become even more regimented as regulations around HFSS come into force, influencing how baked goods providers produce and promote their products.

"Still, there's an important role for indulgent treats," he adds. "Consumers are gravitating towards 'sweet-treat' categories for their affordable pleasures, as the market continues to diversify... and are increasingly intrigued by uncommon flavour profiles and formats. This opens opportunities to have fun with flavour combinations across all bread and cake products."

### Sources

- <sup>1</sup> Nielsen Scantrack (Total Coverage) + Homescan (Discounters & Farmfoods) 52 w/e 07.10.23 vs YA
- <sup>2-4</sup> NIQ Scantrack, Total Coverage incl Discounters, Total pre-packaged sliced bread, value and unit sales, MAT to 09.09.23 vs previous year
- <sup>5</sup> NIQ Scantrack, Total Coverage incl Discounters, Total pre-packaged sliced bread, unit sales, MAT periods over the 5 years to 09.09.23
- <sup>6-8</sup> See 1
- <sup>9</sup> NIQ Homescan, Total GB, Total pre-packaged sliced bread, average weight of purchase (units), 52 w/e 09.09.23 vs YA
- <sup>10-16</sup> Circana data, 52 w/e 23.09.23
- <sup>17-18</sup> Kantar, Food breakfast consumption, 52 w/e 11.06.23, Kantar usage
- <sup>19</sup> IRI, UK market, 52 w/e 07.10.23
- <sup>20</sup> NIQ Scantrack, 52 w/e 09.09.23 (also see p.22)
- <sup>21</sup> IRI 52 w/e 16.07.22
- <sup>22</sup> Kantar Worldpanel, 07.08.22
- <sup>23-24</sup> Nielsen Scantrack (Total Coverage) + Homescan (Discounters & Farmfoods) 52 w/e 17.06.23
- <sup>25</sup> Circana data, 52 w/e 23.10.23
- <sup>26</sup> NIQ Homescan analysis, Apr 23
- <sup>27</sup> NielsenIQ Scantrack, Grocery Multiples, 12 w/e 07.10.23
- <sup>28</sup> IRI, All Retail, UK sales 07.10.23
- <sup>29</sup> <https://www.tastetomorrow.com/inspiration/The-3-hottest-bakery-trends-for-2024>
- <sup>30</sup> See 17
- <sup>31</sup> T, Food Breakfast consumption, 52 w/e 11.06.23, Kantar usage
- <sup>32-33</sup> Asda RetailLink EPOS sales YTD 01.09.23



## Finsbury Food Group

# Abundance of NPD at Finsbury

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### KEY PRODUCTS

Own-label and branded cake, bread and morning goods products, including a licensed brand portfolio of cakes and sweet treats

↙ Finsbury Food Group is one of the UK's leading specialised bakery manufacturers, supplying a range of own-label and branded cake, bread and morning goods products to retailers across the UK and Europe.

This year, in response to the dynamic demands of UK customers, the company has added new products to its extensive licensed brand portfolio, including Thorntons Salted Caramel Marble Bites, TGI Fridays Smores Sundae and Honeycomb Heaven Traybakes and Mars Cupcakes.

For seasonal treats, Finsbury has released gingerbread-infused Thorntons caramel shortcakes and a luxury Baileys Yule Log, featuring a generous layer of Baileys flavoured ganache, a delicious chocolate sponge, rolled with a milk chocolate filling, plus a milk chocolate layer glaze.

Baileys Celebration Cake offers layers of chocolate cake, covered and filled with Baileys infused frosting, while



“New products launched answer the dynamic demands of UK customers”

Baileys Red Velvet Brownies are topped with Baileys flavour frosting, drizzled with dark chocolate and decorated with bronze sugar sprinkles.

With the Euros 2024 fast approaching, Finsbury's England FA Shirt Celebration Cake makes the perfect party centrepiece, and its Disney Encanto Celebration Cake is a real crowd-pleaser for fans of the movie.

**Finsbury**  
Food Group

*Finsbury Food Group is the UK's largest speciality bakery manufacturer.*

We manufacture cake, bread & morning goods for multiple retailers, food service and export channels across the UK & Europe.

We also hold a broad portfolio of licensed brands, including Diageo, Thorntons & Character License.

**Baking Brilliance Every Day**





## Allied Bakeries

# Championing nutritious NPD

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### KEY BRANDS

**Kingsmill**  
**Allinson's**  
**Sunblest**

↙ Allied Bakeries proudly serves a number of different segments, baking and delivering a wide range of bread and bakery goods fresh to stores right across the UK, every day.

“Our biggest brand, Kingsmill, is well-loved and regularly enjoyed by 10m households across the country,” says head of marketing Emma Eggleton. “Kingsmill’s strength is reflected in our iconic, family-friendly 50/50 range – the biggest brand in the healthier white segment<sup>1</sup> and the third-biggest in wrapped bread<sup>2</sup>. With sales in excess of 1m loaves a week, it plays an important role in bringing fibre to the nation’s diet.

“We are also the bakers behind Allinson’s, best-known for its premium Champion Wholemeal and Scandalous Seeds loaves which, at 650g, perfectly meet the needs of smaller households. Allinson’s offers artisanal cues and bridges the gap between wrapped bread and in-store bakery products, bringing shoppers the best of both worlds.”

### ATL support

Regular investment in its brands has seen both Kingsmill and Allinson’s featured on TV screens in the past year. Kingsmill 50/50 launched a new creative direction in its sponsorship of ITV teatime favourite Family Fortunes, and celebrated the King’s Coronation with a limited-release pack design and high-profile in-store support. In 2024, both brands will have new TV creatives.

### Health trends and innovation

“We are proud to support the Food & Drink Federation’s Action on Fibre pledge and, as a result, all of our recent NPD has earned the nutritional claim of at least being a source of fibre,” says Eggleton. “In addition, while most of



“We are extremely positive about the future for our brands, and excited at seeing our long-term investment in both brand and supply chain come together to ensure that Kingsmill and Allinson’s remain at the heart of bakery aisles across the nation”

our range is already non-HFSS, we recently reformulated Kingsmill Golden Pancakes to become non-HFSS while remaining as light, fluffy and delicious as ever. This is great for consumers, and enables retailers to range them within their stores’ feature space.”

Two brand new Allinson’s fruit loaves recently hit the shelf: Fantastic Fruit Loaf is a traditional recipe with vostizza currants while Fabulous Fruit Loaf is a lemon and poppy variant, bringing something new to Allinson’s and the category. “Both loaves are non-HFSS, making them great candidates for in-store feature space,” she says.

“We also look for ways to add value through packaging innovation. In 2021, Kingsmill 50/50 No Crusts launched the industry’s first-ever bread bag to contain 30% post-consumer recycled content. This year we extended this trial to include Kingsmill No Crusts Tasty Wholemeal. The initiative has removed the equivalent of over 2m virgin plastic bags from Kingsmill’s supply chain.

“We are extremely positive about the future for our brands, and excited at seeing our long-term investment in both brand and supply chain come together to ensure that Kingsmill and Allinson’s remain at the heart of bakery aisles across the nation.”



### Source

<sup>1,2</sup>Nielsen Scantrack (Total Coverage) + Homescan (Discounters & Farmfoods) 52 w/e 07.10.23 vs YA





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50% WHOLEMEAL FLOUR  
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\*SOURCE NIELSEN SCANTRACK (TOTAL COVERAGE INCLUDING DISCOUNTERS) 52WKS 14.10.23



ARYZTA

# Provenance and naturalness

DETAILS

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KEY CONTACTS

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Commercial Director  
**Hannah Sibley**  
Product & Innovation  
Director

KEY PRODUCT

Authentic sourdough bread  
French breads  
Viennoiserie  
Sweet bakery

With over 80% of UK consumers buying a fresh bread or roll product at least once a week<sup>1</sup>, bread categories have performed well, driven by traditional French and speciality breads. With flavours, textures, and nutrition driving the rise in speciality breads, it is no longer just a convenient way to add substance to meals.

“We expect this trend to continue into 2024,” says Hannah Sibley, product and innovation director at Aryzta. “The UK market has seen an increase in the need for a more artisanal approach to in-store bakery, with visual impact at its heart. This influence has been seen with large loaves formats, hand finishes and provenance call-outs.”

**In-store attraction**

Freshness is a key driver in bread choice; 63% of UK consumers say that freshly baked products are a mark of quality in bakery<sup>1</sup>, says Sibley. The way freshness is often defined is via shoppers’ senses. “With our breads being baked in-store on a daily basis, this allows us to bake for a little longer which provides that freshly baked smell and delivers a slightly darker appearance, which attracts consumers,” she notes.

Currently, where in-store bakery loaves are put in packaging, it often obscures a lot of the bread. Yet 58% of the UK are comfortable with buying unpackaged (loose) loaves<sup>1</sup>, she reveals.

**Natural approach**

Products that have simple, natural recipes that support the consumers’ increased need for transparency will



“The UK market has seen an increase in the need for a more artisanal approach to in-store bakery, with visual impact at its heart”

continue to grow. A key area of this is sourdough and consumer awareness of this is being driven by artisan bakeries. With its natural preservatives, sourdough provides a great solution for shoppers, says Sibley.

Last year, Aryzta doubled sourdough and speciality bread capacity for the UK and Ireland with the opening of a new sourdough starter plant, she reveals. All of the speciality and sourdough breads produced at the Grange Castle bakery are made using a perpetual live starter, which has 30 years’ heritage. This starter is used and then regenerated on a daily basis at the bakery to create the unique and distinctive flavour of the Aryzta premium sourdough breads.

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

**On-shelf visibility**

There is also a real opportunity for retailers to drive engagement in the category through inspiration at all touchpoints – not just with eye-catching POS at the bakery fixture in-store or online, but also through social media, she says. “This can give extra visibility to new products and drive the sales of existing products, increasing basket spend and growth in other categories.”



Source  
<sup>1</sup> Aryzta Asks survey with 1,009 UK consumers, August 2023



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**Baker Street**

# Reducing waste, driving sales

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**KEY BRANDS**

**Baker Street**

 Baker Street is a brand sustaining growth, despite another challenging year for the bakery category, says Josh Corrigan, customer development director at brand owner St Pierre Groupe. “The brand is up 27% year-on-year<sup>1</sup> thanks to increased distribution via the UK’s major multiple retailers, a consumer desire for ‘super-sized’ meals and continued success in the wholesale sector due to its long-life proposition,” he says.

“We work in collaboration with retailers, sharing insight to understand how to capture shoppers and carving out a space for the brand on the shelves of major multiples. The brand has also maintained its stronghold in convenience and wholesale, but the challenge of reducing wastage applies to all retailers and, increasingly, to consumers, too. Retailers are cost-conscious because their shoppers are – and reducing waste forms a key part of Baker Street’s ‘value’ proposition.”

Baker Street’s range of burger buns and hot dog rolls offer extended shelf-life, appealing to retailers and shoppers alike, while marketing of the brand demonstrates their versatility across multiple meal occasions, offering added value. As such, the Baker Street range of Burger Buns, Hot Dog Rolls and Seeded Burger Buns is up 82% in value sales in the last 52 weeks<sup>2</sup>.

Baker Street has also benefited from the consumer trend for ‘Americana’ that has crossed over from foodservice as shoppers continue to eat well at home, reveals Corrigan. Its range of Mega Burger Buns and Jumbo Hot Dog Rolls are up 69%<sup>3</sup> as consumers look to adopt larger portions for growing occasions like ‘the big night in’.



**“We work in collaboration with retailers, sharing insight to understand how to capture shoppers and carving out a space for the brand on the shelves of major mults”**

The brand portfolio also includes a range of traditional sliced loaves, with a longer guaranteed shelf-life to help reduce wastage. Growth in Sliced White and Sliced Brown variants is steady, but the real growth has come from the brand’s healthier rye bread range.

“Across bakery, consumers are keen to explore healthier alternatives which is why we’ve secured increased distribution on our rye breads in the last year, with sales on Baker Street Rye & Wheat loaf up 16% and on Seeded Rye Loaf up 81% thanks to new listings with the Co-op<sup>4</sup>,” he says. “The rye loaves allow retailers to offer a broader range to shoppers without the concerns around increased wastage.”

In 2023, the brand has further increased its marketing spend with out-of-home advertising, consumer advertising, social media and PR activity running through its key sales periods. Its seasonal range also returned for 2023, enabling the brand to secure a fruitful end to the year, with a positive outlook going into 2024.



**Source**  
<sup>1-4</sup> IRI, All Retail, UK sales to 07.10.23



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\*IRI, All Retail, UK sales to 7th October 2023 \*\*Delivered to depot



## La Lorraine Bakery Group

# Innovating in breads and sweet bakery

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**Rebecca Calveley**  
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 Manager UK&I  
**Tilly Blacker**  
 Retail Account  
 Manager UK&I

### KEY BRANDS

La Lorraine  
 Panesco  
 Donut Worry Be Happy

As one of the market leaders in frozen bake-off products in Europe, La Lorraine Bakery Group has experienced strong performance across its brands, says Rebecca Calveley, trade marketing manager UK&I.

“In terms of bread, demand for buns, rolls and baguettes continues to grow and, despite the cost-of-living crisis, consumers are finding ways to prioritise quality products,” she says.

“Tapping into global bakery trends, we have exciting NPD for 2024,” she reveals. “Authentic Italian flatbreads, such as the new Schiacciata Romana, available in white and multigrain versions, offers consumers a sandwich carrier with true Mediterranean flair. Schiacciata, named after the Italian verb ‘schiacciare’ (press with fingers), refers to how the dough is made. Romana is a typical Italian way of baking: short at high temperature on stone.”

Sweet bakery is also proving a winner, she notes. “We have



“Tapping into global bakery trends, we have exciting NPD for 2024”

introduced three new flavours to our Donut Worry Be Happy brand: the Passionista doughnut, with passion fruit puree filling; the Crushed Candy White, topped with crushed pieces of chocolate candy; and the Raspberry Bliss, packed with a raspberry jam filling. Each doughnut contains 100% natural colours and flavours and is suitable for vegetarians.”

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Contact the team at:  
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## New York Bakery Co.

# Pushing the boundaries on bagels

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### KEY BRANDS

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

### Source

- <sup>1</sup> IRI Unify – Total Market – Total Ambient Bagels – 52 w/e data to 09.09.23
- <sup>2</sup> Kantar WPO – GB – Bagels – 52 w/e 01.10.23
- <sup>3</sup> JS Insights/Quantum Data, Sept 2023
- <sup>4</sup> New York Bakery Co. Sweet Bagels Flavour Screener and TURF Analysis How Do Consumer Research Jan 2022

↙ In the buoyant morning goods category, New York Bakery Co. thrives in the UK bagel market with a 52% share and 1.4% unit growth<sup>1</sup>. As the category leader, its resilience is evident with the highest number of repeat buyers of any bagel brand<sup>2</sup>. The company continues to cater to consumer demands for practical yet flavourful baked goods, with quality at the forefront, it says.

This year, New York Bakery Co. broke flavour barriers with the launch of Cookies N’ Cream Bagels, a first-of-its-kind limited-edition treat, combining an iconic American flavour with the UK’s leading bagel expertise. These offer a chewy texture and a blend of sweet vanilla and rich cocoa cookie pieces.

Based on retailer data, the product incrementally advances the bagel category by attracting younger couples and families, expanding bagel consumption beyond breakfast, and encouraging shoppers to trade up<sup>3</sup>. Prior



“This year, New York Bakery Co. broke flavour barriers with its latest launch”

to launch, research indicated strong potential, with 63% of respondents expressing a likelihood to purchase this new treat, especially families seeking a delightful breakfast or afternoon snack<sup>4</sup>.

In 2024, New York Bakery Co. is poised to introduce a series of groundbreaking NPD set to capture consumer attention as it pushes the boundaries of flavour innovation.



## NEW COOKIES N’ CREAM BAGELS FROM THE UK’S NO.1 BAGEL BRAND\*

NEW YORK OR NOTHIN’

\*IRI Value/Unit Share of Ambient Bagels. UK All Outlets, 52 w/e 07.10.23



Pandriks Bake Off

# The best in bake off

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 Commercial Director  
 UK & Ireland  
**Sharon ten Berge**  
 Marketing Director

KEY BRANDS

**SlooOW**  
 La Collection by  
 Atelier Pandriks

➔ The bread market continues to be a dynamic category with growth expected to be 12% between 2022 and 2027<sup>1</sup>. Poised to tap into this opportunity is Pandriks, which established its first 100% natural bakery in The Netherlands in 2012. With another production location opened in Germany in 2016, the company now supplies leading retailers across Europe with both frozen bake-off bread for in-store bakeries as well as gas-flushed part-baked bread to bake at home.

Pandriks first entered the UK in the bake-at-home category in 2021 with the SlooOW brand and has since gained listings with national retailers including Tesco and Co-op. The brand has also been shortlisted again as a finalist for The Grocer New Product & Packaging Awards 2023.

**Time is our best ingredient**

Sebastien Guibert, commercial director UK & Ireland notes that Pandriks' unique process is key to its success. "We create our truly unique and high-quality bread by combining traditional baking techniques with state-of-the-art manufacturing. So our customers get the best of both worlds," he says. "All the recipes are made using 100% natural ingredients, crafted over 30 hours and stonebaked for a thin, crispy crust. The result is high-quality breads, artisanal in style and free of artificial additives. Our mission is to offer the best in bake-off bread. 'Time is our best ingredient' is our motto and our traditional process yields a more flavoursome and nutritious bread."

With this expertise, Pandriks is perfectly placed to capitalise on the growing demand for products made with a 'clean' ingredients list, says Guibert. "Not only do consumers prefer bakery products that are minimally processed and free from artificial additives, but 28% of consumers are willing to pay more for them. In fact, 71% of consumers globally would buy more at bakeries



“All the recipes are made using 100% natural ingredients, crafted over 30 hours and stonebaked for a thin, crispy crust”

where everything is baked with natural ingredients<sup>2</sup>,” he says.

In addition, the UK organic food and drink market grew for the 11th year in a row in 2022, by 1.6% to reach £3.1bn<sup>3</sup>, with Pandriks' own consumer research showing that 63% of respondents believe organic bread is better for your health<sup>4</sup>. "Pandriks has also seen its sales of organic bake-off products increase year-on-year," reveals Guibert.

**Bread with benefits**

Pandriks' ambition is to democratise 'good bread' and it is against this that the company develops all of its NPd. "The business was founded on the belief that food should be nutritious, made with simple natural ingredients and without artificial additives," says marketing director Sharon ten Berge.

Pandriks' latest innovation in the bake-at-home category is SlooOW High Fibre Wholemeal Rolls, containing over 6g of fibre, nearly the same amount as chickpeas, making them a tailored product to encourage healthy digestion, adds ten Berge.

"With growing interest from consumers in health, organic and sourdough the future is set to be bright for Pandriks in the UK," she concludes.



Source

- <sup>1</sup> Mintel UK Bread Market Report 2022
- <sup>2</sup> Puratos Taste Tomorrow trend forecast 2023
- <sup>3</sup> Soil Association Certification – Organic Market Report 2023
- <sup>4</sup> Pandriks Online Consumer Research 2023





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## St Pierre Groupe

# Premium offer drives growth

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Group Commercial Director

### KEY BRANDS

St Pierre

St Pierre, the European bakery and brioche specialist, has continued its upward trajectory this year. In the UK alone, the brand has achieved growth of 107%<sup>1</sup> in value sales, and perhaps more impressively, 56% in volume<sup>1</sup> – bucking the wider category trends, once again.

Gains in the last 12 months have come from significant distribution increases with the UK's major multiples, a prolific stream of new product development (NPD) and increased investment in marketing to build the brand, following St Pierre Groupe's acquisition by Grupo Bimbo in October 2022.

UK sales director Rachel Wells says: "Our core range of brioche burger buns and hot dog rolls has continued to fly as shoppers embrace premium options that allow for easy upgrades to at-home menus. Our Seeded Brioche Burger Buns are up 84%, our Brioche Burger Buns are up 164% and Brioche Hot Dog Rolls are up 68% in the last year<sup>2</sup>.

"While we've continued to drive sales of the core range, our NPD has not slowed. We launched five new products in 2022 and this year delivered a further four new SKUs, with our first-ever seasonal launch – St Pierre's Chocolate Brioche Wreath – for Christmas 2023."

St Pierre is adept at developing products that cater to multiple meal occasions, but highlighted breakfast as an area of focus heading into 2023, she reveals. As a result, St Pierre is the fastest-growing brand in morning goods<sup>3</sup>. Increased distribution on its multipack range of Brioche Swirls and Chocolate Chip Brioche Swirls and Chocolate-filled crêpes has driven



**“There’s an opportunity for retailers to inspire shoppers, offering affordable luxuries at a time when they are – economically speaking – more discerning”**

sales growth of 229%, 278% and 264%, respectively<sup>4</sup>. The brand also launched St Pierre Belgian Waffles with Butter and St Pierre Belgian Waffles with Chocolate Chips in Q3 this year. St Pierre's waffles offer a premium solution in a category growing at 14%<sup>5</sup> but will no doubt be helped by the addition of an innovative new product, adds Wells.

"Shoppers are still elevating meals at home, as it is more cost-effective than going out. There is such opportunity for retailers to inspire shoppers, offering affordable luxuries at a time when they are – economically speaking – more discerning. So, we've expanded our merchandising approaches with UK retailers this year – offering new ways to increase dwell time and drive sales."

St Pierre's innovative in-store merchandising has proven successful in the US and, this year, it implemented its eye-catching displays in Morrisons and Asda stores. Wells reveals that stores with an Eiffel Tower display saw sales increase by 58%<sup>6</sup> while stores with St Pierre's branded bays saw units per store, per week rise by 42%<sup>7</sup>. "Clearly, there is opportunity for retailers to drive interest in the fixture and we look forward to working with our retail partners in 2024 to further improve the shopper experience."



### Source

- <sup>1,2</sup> IRI, All Retail, UK sales to 07.10.23  
<sup>3</sup> Nielsen, Value Sales L52 weeks to 03.06.23  
<sup>4</sup> IRI, All Retail, UK sales to 07.10.23  
<sup>5</sup> L52 Weeks Nielsen Total Coverage to 11.03.23  
<sup>6,7</sup> EPOS sales YTD 01.09.2023





GROWTH OF 107% YOY\*\*

DRIVING GROWTH IN MORNING GOODS +104%\*\*\*

# — BAKERY MADE — MAGNIFIQUE



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\*Nielsen, Value Sales L52 weeks to 3rd June 2023 \*\*IRI, All Retail, UK sales to October 7th 2023

\*\*\*Nielsen, Value Sales L52 weeks to 3rd June 2023 \*\*\*\*Consumer sensory hall tests Jan 2022, St Pierre vs. UK competitor brands and private label (brioche burger bun & brioche loaf), N=202



Warburtons

# Exciting growth opportunities

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KEY BRANDS

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

↙ Wrapped bread continues to be as resilient as ever, with 99% of British households still buying over 30m loaves of sliced, wrapped bread each week<sup>1</sup>, reports Warburtons. However, bakery occasions is where the real success story lies, as it is now one of the biggest long-term growth drivers across all of grocery<sup>2</sup>. In fact, sales of bakery occasion products – driven by the likes of crumpets, bagels and pittas – now outweigh wrapped bread sales<sup>3</sup>, as consumers look for options to make mealtimes more interesting.

Warburtons, regarded as Britain's No.1 bakery brand<sup>4</sup>, is now also the No.1 brand in bakery occasions<sup>5</sup> due to its innovation and investment in the high-quality products consumers seek, reveals sales director Colin Bebbington. Already brand leader in crumpets, pittas and thin bagels<sup>6</sup>, Warburtons has launched several new products over the last year; these include extending its Thin Bagels range with Big 21 Seeds & Grains, adding Crumpet Thins to its crumpet family and launching Soft Naans to give consumers a tasty and convenient option for mealtimes.

“Key trends such as health also continue to influence consumers, and demand for protein-rich products has taken many a food category by storm over the last few years – and bakery is no exception,” he adds. “One in four shoppers are now interested in the protein content of bakery products<sup>7</sup>, which is clear when you look at the incredible consumer demand for Warburtons Protein Thin Bagels – up 53% in volume<sup>8</sup>. In early 2024,



“While consumers continue to buy wrapped bread, we’re seeing increasing growth from bakery occasion products, such as crumpets, pittas, thins and bagels”

Warburtons will extend its protein range with an exciting new 800g loaf – Protein Power – to give consumers looking for quality bakery that is high in protein, even more choice.

“We’re completely biased of course, but the wrapped bakery market remains really exciting, with lots of potential growth opportunities,” notes Bebbington. “While consumers continue to buy wrapped bread, we’re seeing increasing growth from bakery occasion products – such as crumpets, pittas, thins and bagels. This shows that innovation remains key to success, and we continue to delight consumers with new, exciting products to keep them shopping in the bakery aisle. But consumers also look to brands such as ours to give them the quality they seek, be that in bread or bakery occasions.”

Warburtons has also been busy building its brand with another unmissable marketing campaign, featuring the one-and-only Samuel L Jackson. However, the real star of the show is its classic white Toastie, showcasing a commitment to quality – and, fundamentally, why they are worth paying more for. The brand also delivered successful in-store campaigns to drive incremental purchase through display opportunities, such as National Crumpet Week, which grew sales of crumpets by over 30%<sup>9</sup>.



Source

- NielsenIQ Scantrack, Grocery Multiples 52 w/e 07.10.23
- NielsenIQ Scantrack, Total Coverage incl Discounters, Morning Goods and Speciality Breads, 52 w/e 09.09.23
- See 1
- YouGov, June 2023, Nat Rep survey of 2,041 respondents
- NielsenIQ Scantrack, Grocery Multiples, 12 w/e 07.10.23
- Warburtons sales data



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\*Source: NielsenIQ Scantrack, Grocery Multiples, 52WE 07.10.2023



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