



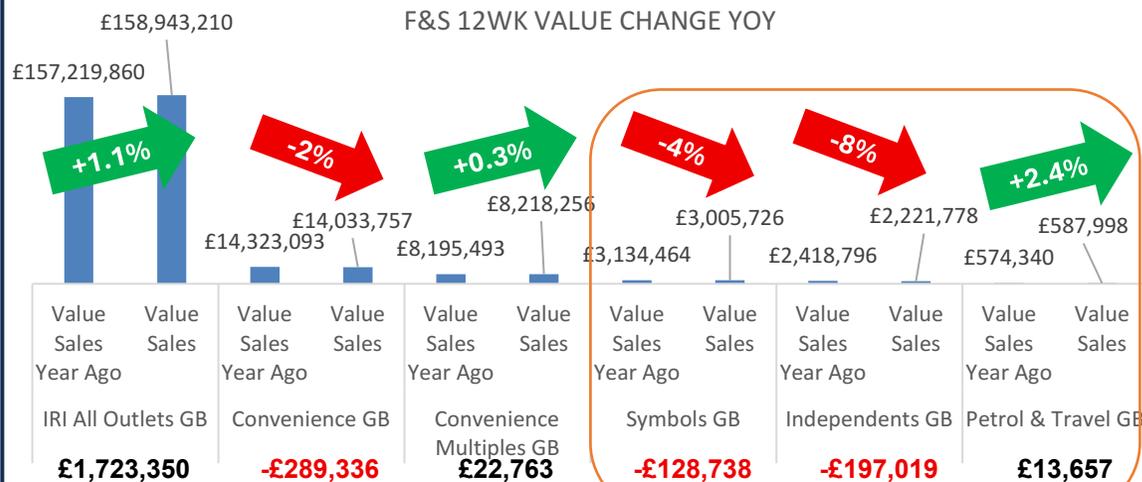
F&S



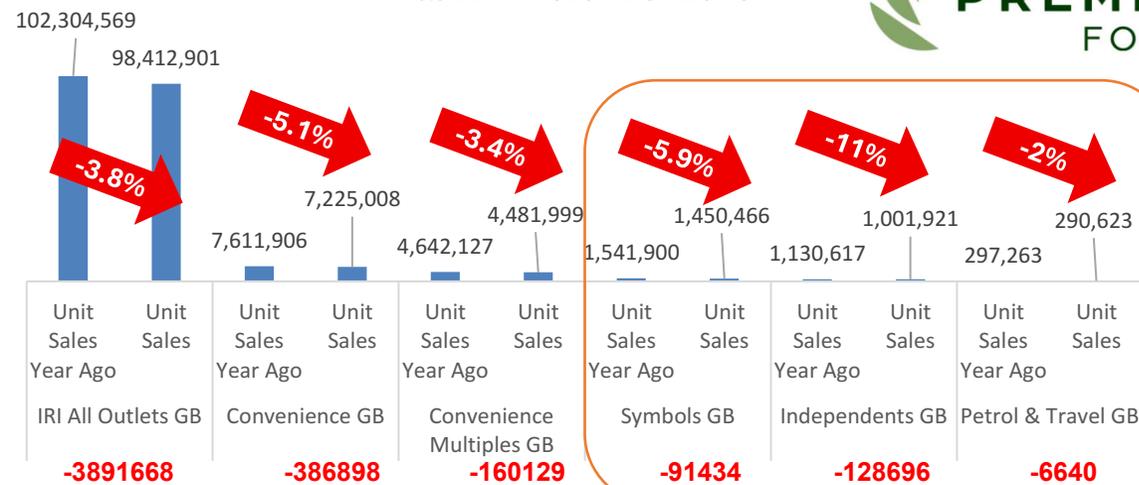
# F&S: Category breakdown.



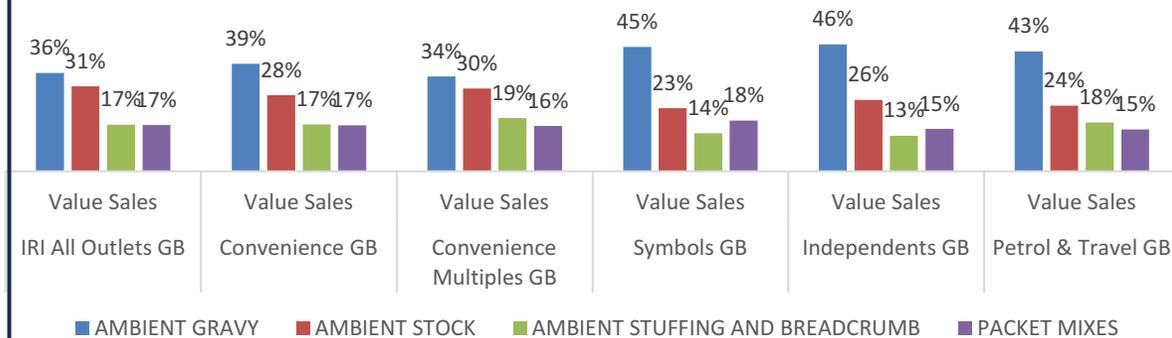
F&S 12WK VALUE CHANGE YOY



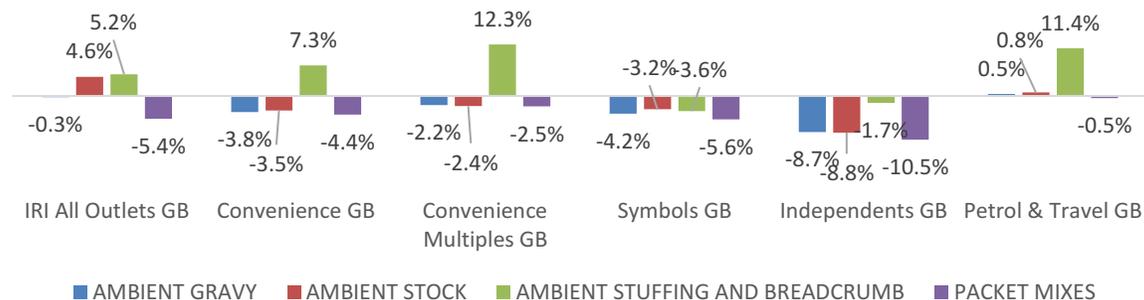
F&S 12WK VOLUME SALES YOY



Sub Category Value % Share



Sub Category 12wk % Value Change YoY



**Symbols & Independents under performing in 12wk value vs market with all sub categories in decline vs year ago. S&I over trade in gravy. Stuffing & Stock growing in total market +£3m vs year ago. Volume per trip +1.7% and average price +1% vs year ago.**

# F&S IS A HIGH VALUE, STAPLE CATEGORY

Category size:

£610m

Penetration:

87.7%

Buyers:

25.4m

Frequency:

10.9x  
annually

Occasions:

2.8bn



<sup>(1)</sup> The F&S category is worth £51m in the convenience channel!

<sup>(1)</sup> Gravy is the largest sub category, worth £19m

<sup>(1)</sup> Bisto is the #1 Gravy brand with 76% market share

<sup>(2)</sup> There are 1.2 billion Roast Dinners every year in the UK!

<sup>(2)</sup> 30% of households are regularly cooking Roasts

<sup>(2)</sup> Sunday only accounts for 48% of all roasts with the mid week roast +18.3% YoY

<sup>(1)</sup> Wet stock is driving total category growth +£300k in the convenience channel YoY

**F&S is currently a seasonal category reliant on colder weather**

<sup>(1)</sup> OXO is the #1 brand in dry stock with over 50% share

<sup>(2)</sup> Over 70% of all stuffing occasions are had as part of roast dinners

<sup>(1)</sup> Circana – Convenience GB/IRI all outlets – Flavours & Seasonings – 52wk Value Sales Jan 2025

<sup>(2)</sup> Kantar QPO – F&S – 2024/2025

# Flavours & Seasonings



## THE OPPORTUNITY

### Value of the category

The flavours and seasonings category is worth £52m in Convenience Stores.



### Over index in Gravy

Gravy over indexes within the Convenience Channel with retail sales value of 39% compared to 35% in the major multiples.



### More Ranges

As well as our standard options we have more ranges such as Oxo Stock Pots and Bisto Best. These give shoppers the chance to trade up and help increase basket spend.

## GROW YOUR SALES

### Stock the key brands

Bisto, Paxo and Oxo are GB's No.1 brands.



### Segment the fixture

To help shoppers find items quickly and easily.

### Create a meal occasion

Create a roast shelf to support meal occasions.

### Merchandise at eye level

Ensure gravy is at eye level to hero category.

# So what can S&I retailers do?



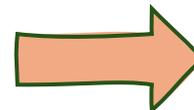
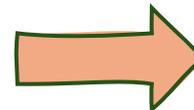
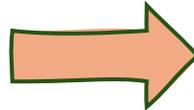
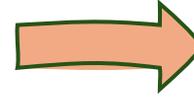
## INSIGHTS

Seasons like Christmas, Easter & Ramadan see growth in the total market & convenience channel.

Seasons see consumers trading up within the gravy category as this is seen as a more premium occasion. 2 in 5 shoppers buy into the F&S category over Easter.

Drive stuffing & stock sales over seasonal periods. Stuffing is the #1 forgotten item at Christmas.

Ambient stock under trade in the S&I channel, Dry stock performing well in convenience.



## ACTIONS

Opportunity to drive sales in these periods by using the correct promotional plans & peaks, and using retailer one pagers/planogram support & comms.

Ensure the right range of gravy is stocked. S&I over trade in the gravy category, so it's important to range the right products and include a more premium offering as well as core range. Gravy stats show a good opp for impulse purchasing.

Range Stock, Stuffing & gravy in more than one place over seasonal periods to encourage impulse purchasing.

Range enough dry stock SKU's as these perform better than concentrated stock. #1 occasion for stock is Soup. Support consumers with soup making through winter periods & push soup season.

# Minimum Credible Range for Convenience

BRAND	PRODUCT DESCRIPTION	6 Shelf	5 Shelf	4 Shelf	3 Shelf	2 Shelf	1 Shelf
Bisto	Bisto Gravy Granules Favourite 190g	Y	Y	Y	Y	Y	Y
Oxo	Oxo Beef Stock Cubes 12 Pack 71g	Y	Y	Y	Y	Y	Y
Paxo	Paxo Sage & Onion Stuffing 170g	Y	Y	Y	Y	Y	Y
Bisto	Bisto Gravy Granules Chicken 190g	Y	Y	Y	Y	Y	Y
Saxa	Saxa Fine Sea Salt 350g	Y	Y	Y	Y	Y	Y
Knorr	Knorr Stockpot Chicken 4's 112g	Y	Y	Y	Y	Y	Y
Bisto	Bisto Best Gravy Granules Roast Beef 230g	Y	Y	Y	Y	Y	
Bisto	Bisto Reduced Salt Gravy Granules Favourite 190g	Y	Y	Y	Y	Y	
Colmans	Colmans Cheese Sauce Mix 40g	Y	Y	Y	Y	Y	
Colmans	Colmans Pepper Mix 40g	Y	Y				
Schwartz	Schwartz World cuisine Chilli Con Carne Mix 41g	Y	Y	Y	Y	Y	
Knorr	Knorr Stock Cubes (dry) Chicken 8 Pack 76g	Y	Y	Y	Y	Y	
Knorr	Knorr Stockpot Veg 4's 112g	Y	Y	Y	Y	Y	
Oxo	Oxo Veg Stock Cubes 12 Pack	Y	Y	Y	Y		
Bovril	Bovril Beef paste 250g	Y	Y	Y	Y		
Knorr	Knorr Stockpot Rich Beef 4's	Y	Y	Y	Y		
Bisto	Bisto Best Gravy Granules Roast Chicken 230g	Y	Y	Y			
Paxo	Paxo Golden Breadcrumbs 227g/ Ruskoline b/cumb (Scot)	Y	Y	Y			
Oxo	Oxo Reduced Salt Beef Stock Cubes 12 Pack	Y	Y	Y			
Bisto	Bisto Gravy Powder 200g	Y	Y	Y			
Colmans	Colmans Parsley Sauce Mix 20g	Y	Y	Y			
Nandos	Nandos Bag In The Bake medium 20g	Y	Y	Y			
Oxo	Oxo Chicken Stock Cubes 12 Pack	Y	Y				
Colmans	Colmans Beef Casserole Mix	Y	Y				
Colmans	Colmans Bread Sauce Mix Dry 40 Gr	Y	Y				
Colmans	Colmans Chicken Casserole Mix	Y	Y				
Colmans	Colmans Sausage Casserole Mix	Y	Y				

## MUST STOCK SKU'S



# Planograms & support for retailers

[30889\\_001\\_PREMIER FOODS PLANOGRAMS 2023\\_V4.indd](#)



For more information visit  
[www.grocerypartners.co.uk](http://www.grocerypartners.co.uk)

