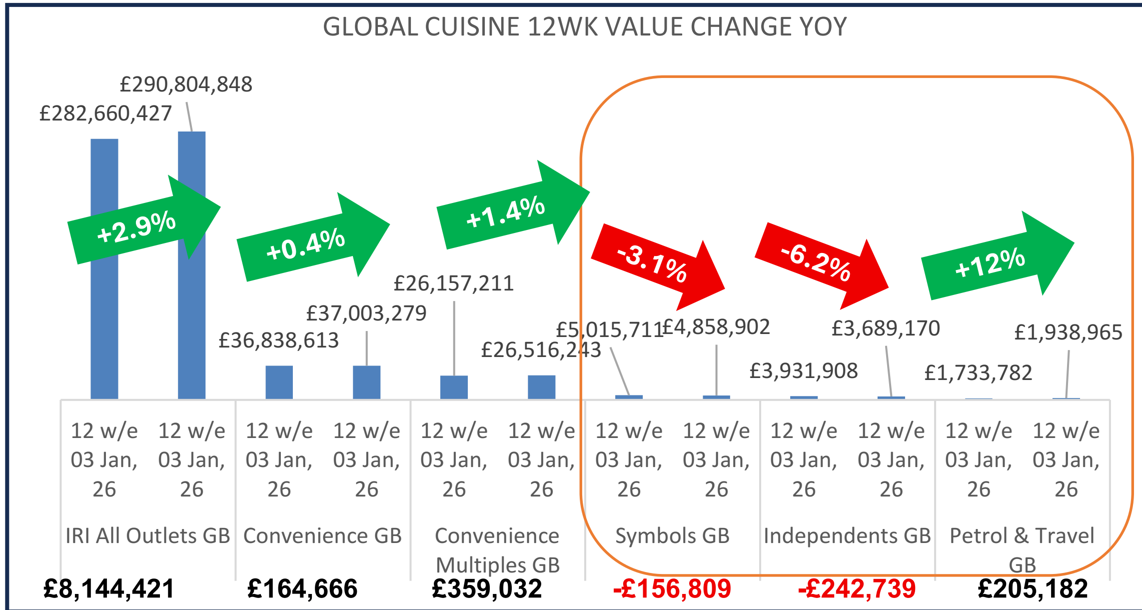
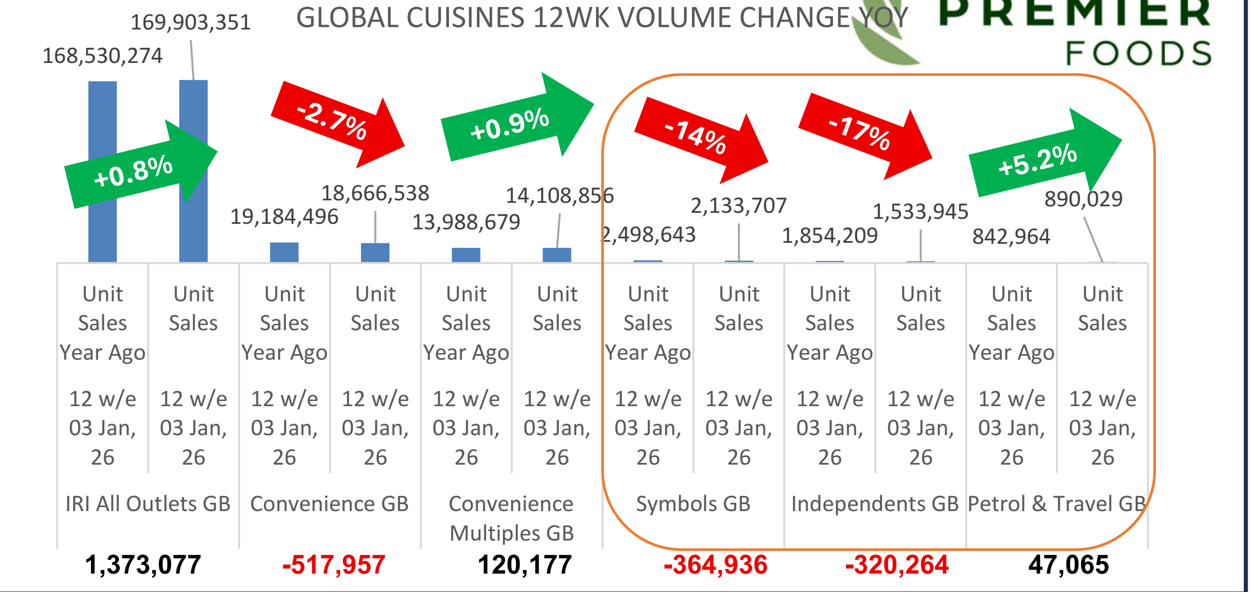
PREMIER
FOODS

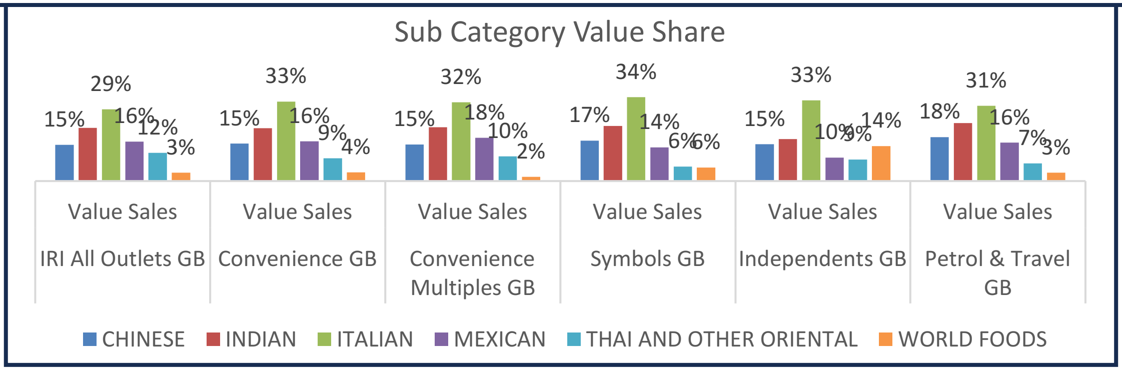
Global Cuisines

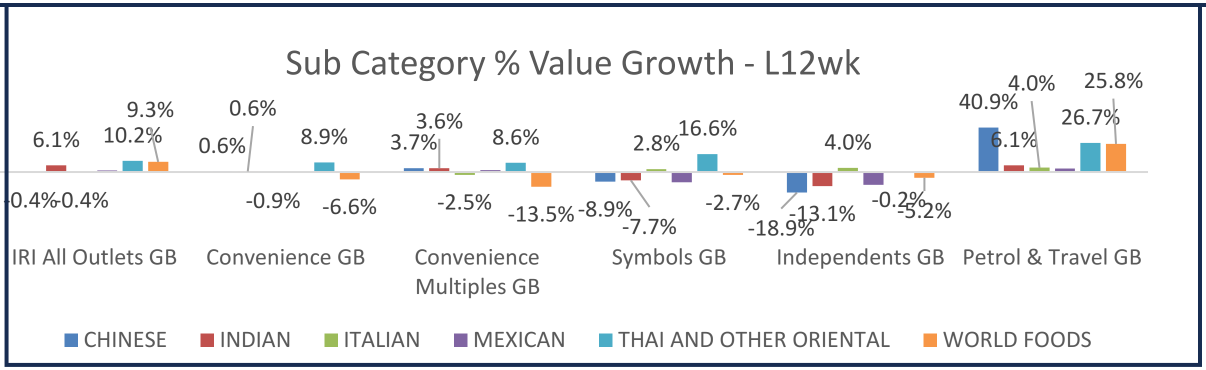
enriching life
THROUGH FOOD

Global Cuisines Category breakdown.









Petrol & Travel out performing the market +12% in value vs year ago. Symbols & Independents under performing vs the market. Italian over index in convenience vs the market and is driving growth within the channel. Thai driving growth in symbols +16.8% driven by Thai Ingredients. Chinese significantly declining in S&I driven by independents, driven by accompaniments. Penetration -0.5% in S&I

Cooking Sauces is a well known and well loved Category...

£1.2BN

£39M S&I

Household Penetration % L52wks

92.7%

Tea
75.3%

Table Sauces
87.9%

Crisps
91.9%

2.6 Billion Occasions

PREMIER FOODS COOKING SAUCES

Source: Circana, 52wks to X | Kantar, 52wks to X

Easy preparation for the cook is necessary for S&I! Targeting tasty, filling midweek meals when households are pushed for time.

The challenges

We have a lack of time in households for complex meal prep every evening

Consumers are too tired to cook big meals every night

Consumers need simple solutions for the lunch occasions

If we do nothing…

Consumers will look for Easy fixes within Chilled

….or Frozen

Category will lose family shopper occasions Monday to Thursday

Offering new authentic cuisines and flavours from around the world and making them mainstream.

The challenges

The category is developing. We need to tap into the new markets to keep the category exciting & appealing.

The rise in social media and influencers makes new cuisines & recipes a lot more accessible.

Increase in rapid delivery from restaurants creates bigger competition for the evening meal.

If we do nothing...

Ranges become tired and are perceived to be old fashioned

Shoppers lost to other exciting categories & meal occasions

Chilled & Frozen or take-out become the winners

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22

Offering new authentic cuisines and flavours from around the world and making them mainstream.

Reasons to believe

53% on shoppers said they rely on brands when cooking new flavours or cuisines *(AAA)*

Warm	Hot	Emerging	Established	Peaked
Authentic Mexican	Taiwanese	Sri-Lankan	Contemporary Indian	Traditional Chinese takeaway
Levantine (Cyprus, Syria, Lebanon, Jordan, Israel and Palestine)	Keralan	Turkish	Korean	Traditional Indian curry
Filipino	Singaporean	Japanese	Australian BBQ	Undifferentiated Italian
Venezuelan	Moroccan	Filipino	Thai	North American
Portuguese	West African	Hawaiian	Specialist Italian	Mexican
	Caribbean		Greek	
			Modern British	

Source: Lumina Intelligence, December 2021

Out of Home and Food Service Channels are seeing growth across new flavours and cuisines

How we win

Expanding ranges into new accompaniments & cuisines

Increased awareness of current portfolio & creative usage ideas via comms & media

Increase trial through events & enhance instore executions

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Helping create those special 'dining-in' moments at home.

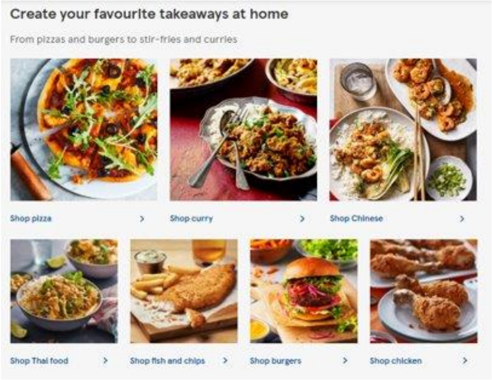
The challenges

Out of Home moved in-home. 60% of shoppers are looking to spend less on takeaways & eating out due to the cost-of-living *(AAA)*

People value their time at home more than ever. Treating oneself, friends & family is also important.

If we do nothing…

Shoppers will down-trade within the category just for everyday meals, as the together need won't be satisfied. – Move category from basic everyday



Consumers will look for solutions within other categories & channels

The category remains reliant on Mon-Thursday meal occasions

(1) Circana – Convenience GB/IRI all outlets – cooking Sauces, Kits & Accomps – 52wk Value Sales Jan 2025
(2) Kantar QPO – F&S – 2024/2025
(3) Lumina Intellogence Convenience tracking program 2025
(4) PF AAA Survey 2024

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[1] Global Cuisines is worth £181m in the convenience channel

[1] Italian is the most popular cuisine with 32% share of category in the convenience channel

[1] The Indian category grew +3% in convenience last year, now worth £53m!

[1] 13.9% of all cooking sauces sales go through the convenience channel

[1] The convenience channel over indexes on Italian vs total market

[3] 56% of cooking sauces in the convenience channel are branded products!

[4] 60% of shoppers are looking to spend less on takeaways & eating out due to the cost-of-living

[4] [3] Authenticity and low price remain the top 2 attributes looked for in World Cuisines

[4] 53% on shoppers said they rely on brands when cooking new flavours or cuisines

[3] 62% of shoppers want an easy fix through the week for dinner. Meal for tonight is one of the largest missions in the convenience channel

Global Cuisines

PREMIER FOODS

THE OPPORTUNITY

Value of the category

The cooking sauces category is worth £162m in Convenience

High penetration

Over 93% of households buy Cooking Sauces over the course of a year

Meal for Tonight mission

Shoppers on a Meal for Tonight mission spend more, average spend is £9.76 and 3.1 items

GROW YOUR SALES

Stock the big brands

At eye level-they are key to hero the category.

Segment the fixture

by cuisine with the accompaniments to help ease of shop.

Highlight the range

With chilled protein and fresh produce to drive total solution.

Maximise events

To drive cuisines, such as Curry week and Italian week etc.

So what can S&I retailers do?

cooking sauces
kits & accomps

INSIGHTS	ACTIONS
The top 5 brands account for over 15% of cooking sauces sales in the market and 56% of cooking sauces sales are branded products	Stock the best selling brands and highlight these in fixture by merchandising these at eye level to ensure ease of purchase for shoppers in store.
Events such as Curry week, Italian week & Lunar New Year drive sales for the category.	Ensure a good promotional plan for each event to drive sales. Optimise promotional space like gondola end feature, social media & POS in store to excite shoppers and drive event awareness.
Meal for tonight is one of the most important and growing missions in the convenience channel.	Ensure link deals between sauces, rice/noodles, or fresh produce where possible to highlight value for shoppers and provide a simple meal solution.
60% of shoppers are looking to spend less on takeaways & eating out due to the cost-of-living	Stock the best selling meal kits to offer an affordable equivalent to a takeaway for shoppers and highlight quality through best selling brands. Kits are growing in the market particularly in Indian and Thai.

Planograms & support for retailers

30889_001_PREMIER_FOODS_PLANOGRAMS_2023_V4.indd

For more information visit
www.grocerypartners.co.uk