



Category Insight – F&S



FLAVOURS & Seasonings

THE FLAVOURS & SEASONINGS CATEGORY IS WORTH £52M IN THE CONVENIENCE CHANNEL AND IS GROWING +1.2% YOY



F&S is a seasonal category, with sales soaring at Easter and Christmas

59% of consumers are increasing how many meals they cook from scratch

43 packs of Bisto sold every minute!

23% said they purchased when they saw it and remembered they needed it, large impulse opportunity

Ambient Gravy worth **£179m** in Total market

Sunday only accounts for 48% of all roasts – many are mid week!

Shoppers are looking to create more special in home occasions

There are 1.2bn Roast occasions every year!

Mid week roasts are +18% YoY

PREMIER FOODS are #1 IN FLAVOURS & SEASONINGS



#1 AMBIENT Gravy Brand in the Market

SAXA



#1 TABLE SALT in Convenience



NATIONS FAVOURITE DRY STOCK



#1 INDIAN BRAND in INDEPENDENT RETAILERS

Cape Herb & Spice



£3.5M BRAND!

FLAVOURS & Seasonings

THE FLAVOURS & SEASONINGS CATEGORY IS WORTH £52M IN THE CONVENIENCE CHANNEL AND IS GROWING +1.2% YOY



**The Gravy category is worth
£168M**

*78% of Gravy
Shoppers are aged
45yrs+*

*Bisto is the only brand to
support the category with a
consistent £5M annual media
spend reaching 76% UK
audience*

*Home made soup is the
#1 occasion for stock!*

*80% of Roast Dinners contain
Potatoes*

*59% of people want to eat
more roasts at home*

*Consumers are looking for Elevated
Experiences but still need quick
convenient solutions*

*Roast Potatoes voted
the UK's favourite
element of the Roast*

*80% of Chicken dinners are
consumed in the evening*

*75% of Respondents cited
health as important
consideration when buying
breadcrumbs*



CHRISTMAS



CHRISTMAS IS ONE OF
THE BIGGEST OCCASIONS
FOR THE F&S CATEGORY.



Gravy, stock and stuffing play a key role in our roast dinners

Christmas dinner
spending grew +3.5%

*Convenience shoppers opted to
visit shops themselves more
during Christmas 2024 than
2023.*

Whilst chicken remained our most
popular roast this festive season,
beef has also grown share and
proved to be favourable this year

Ambient Stock seeing most growth
of bulk purchasing in Total Market

**We spent more on our roast
dinners during Christmas vs
the rest of the year**

*We spent 5 minutes less preparing our roasts
vs 2023 as we continue to look for convenient
solutions.*

Meat extract grew +26% in the
convenience channel over
Christmas 2024 vs 2023!

*Most buyers don't just buy from one F&S
category over the Christmas period and
are cross category shopping*

**Novelty Xmas has seen
more growth than the rest
of F&S**

*In Total Market Bisto
Turkey 190g saw the
highest sales of limited
edition skus*

Special Displays increased in
importance to drive Impulse
purchases



Easter is one of the largest occasions for the F&S category.



Drive sales through comms – highlight core range

Easter is a great opportunity to encourage shoppers to trade up!

1 in 3 people will have a big easter meal.

We saw soaring growth in London & South compared with moderate growth elsewhere over Easter 2024

2 in 5 shoppers buy into the F&S category over Easter

People celebrated by eating a roast dinner which was mainly roast Lamb

Of those having a big Easter meal, 65% will have a roast dinner.

66% of shoppers look for seasonally relevant flavors in familiar formats

shoppers save their Easter category spending until the end, with nearly half the event spend coming in the week of Easter itself

65% of people will eat a roast dinner on Easter Sunday

16% of shoppers trade up at Easter, 59% purchase their usual items.

Source: PF AAA Easter study, Sample size = 400. What day did you have your main Easter meal (that you did most of the food shopping for)

The Nation's Favourite

Bringing the family together with our core range

Bisto Favourites

Brought by 1 in 4 UK Households
43 packs sold every minute!

45% Higher Repeat Rate
than Goldenfry Gravy



BISTO IS THE
NUMBER #1
BRANDED
GRAVY

Paxo Stuffing

Paxo is present in 1 in 5 UK households.
Dominates the Stuffing market with
a whopping 69% of share!

Over 70% of all
stuffing occasions
are had as part of
roast dinners.



PAXO IS THE
NUMBER #1
BRANDED
STUFFING

OXO Stock Cubes

Bought by 9.5m households
each year

Dominant market value
share in Dry, over 50%

OXO has the highest
brand connection &
awareness in stock



OXO IS THE
NUMBER #1
BRANDED
DRY STOCK





1.2BN Roast Dinners every year in UK



30% of UK Households regularly cooking Roasts



Sunday only accounts for 48% of all roasts



Roast are evolving with Mid Week Roast +18.3% YOY*



**2+ hours of time
& effort to create**

**And costs approximately
£2.46p per person!**

3. THE ROAST



3. THE ROAST



ON AVERAGE
**THE SUNDAY
ROAST
CONTAINS**

7 ITEMS

3. THE ROAST



3. THE ROAST



**GRAVY being MOST popular
item of the roast**

SO HOW can we SUPPORT?



FLAVOURINGS & SEASONINGS

Our portfolio within the flavourings and seasonings category offers a variety of cupboard staples including Bisto, Oxo, Paxo and Saxa. These are iconic brands which have evolved over the years in response to consumer demand and changing habits. As well as our standard options we have extended the range to include more premium ranges such as Oxo Stock Pots and Bisto Best. These options give shoppers the chance to trade up and help increase basket spend.

Jump to: [OVERVIEW](#) [GROW YOUR SALES](#) [THE RANGE](#)



- Strong portfolio of insights and data, including our own internal AAA surveys.
- Internal planogram support
- MCR & Core range leaflets and documents



Creating excitement around seasonal events like Christmas & Easter.



The right NPD for the convenience channel

GET YOUR CORE RANGE RIGHT



Available in price-marked packs

Stock the right PMP products