

#### 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

23% said they purchased when they saw it and remembered they needed it, large impulse opportunity 43 packs of Bisto sold every minute!

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







### 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









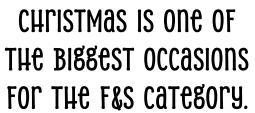






# CHI ISTMAS







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

Christmas dinner spending grew +3.5%

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

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

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!

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

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

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.









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

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

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

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





#### 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



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\*

Source: Kantar



## 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.

tump 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**



Cubes 12s 71g

Bisto Beef Gravy Granules 190g



Bisto Beef Reduced Salt Gravy Granules 190g



Cubes 12 71g



Reduced Salt Bisto Chicken Gravy nules 190a Granules 190a



Paxo Golden Breadcrumbs 227g



Bisto Best Beef Gravy Granules 200g

Paxo Sage & Onion

Stuffing 170g



Gravy Granules 200g



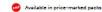
Oxo Beef Stock Cubes 12s 71g



Saxa Table Salt 750g



Saxa Sea Salt Fine 350g



Stock the right PMP products



