

Category Insight – QMS&S







QUICK Meals, snacks & soups

THE QUICK MEALS AND SNACKS CATEGORY IS WORTH £127M IN THE CONVENIENCE CHANNEL AND IS GROWING +27.5% YOY



57% of snack meal shoppers are 16 - 44

Total Soup category is worth over £380M

Authentic pots sales have increased by £21m over the last 5 years.

Pot Snacks account for 66% of the QMS&S category

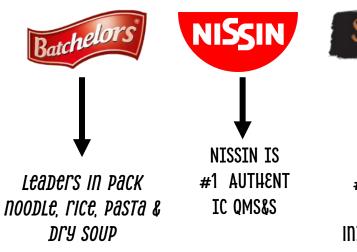
Noodle blocks account for 28% of the OMS&S category

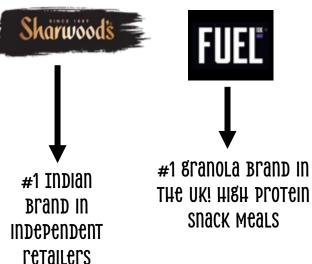
Authentic cuisine is expected to grow +14% by 2029. 65% of consumers area eating spicier food today VS YA.

52.9% of Pot snacks purchased are branded.

Symbols and Independents are seeing the most value growth in Pot Snacks at +5.8% YoY.

Premier foods are #1 in quick meals soups and Snacks









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22% of instant soup occasions are consumed for health

Pasta makes up over 2.2bn occasions each year, but consumers want more convenient choices

Hot lunch occasions are up +29% vs LY

AUTHENTIC NOODLE BAGS MARKET RSV £8m

Authentic pots sales have increased by £21m over the last 5 years.

Authentic is the 8th Biggest meal occasion in UK

Authenticity is the second most important factor to QMS Shoppers after price.

Protein based snacks are on the rise but limited savory options.

23% of authentic pots are curry

Nissin is the #1 brand in Japan







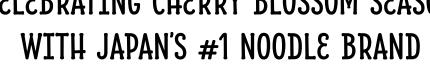






Japan Week...

CELEBRATING CHERRY BLOSSOM SEASON





WITH OVER 40% OF SHOPPERS Seeking authenticity when **EXPLOTING BLOBAL CUISINES**



as Japan's #1 noodle brand, Nissin is UNIQUELY POSITIONED TO CREATE AN EVENT













A FAMILY OF NATION FAVOURITES, GENERATING £155M RETAIL VALUE





43% PENETRATION

12 MILLION HOUSEHOLDS

HAVE BROUGHT BATCHELORS IN THE LAST YEAR



>145 MILLION UNITS IN UK

SOLD EVERY YEAR

ACROSS GROCERY MULTIPLES, HIGH STREET DISCOUNTER, WHOLESALERS & FOOD SERVICE

A BROAD-BASED AUDIENCE WITH A SIGNIFICANT OVER-INDEX ON FAMILIES & YOUNGER CONSUMERS

M/F

16-44

B,C,D

PRE-FAMILY & FAMILY W/ CHILDREN







Biggest media spend

38% SHARE OF VOICE OF QUICK MEALS

NISSIN IS THE FASTEST GROWING AUTHENTIC BRAND IN THE L5Y & BIGGEST NPD IN THE SECTOR

1.2BN EAST ASIAN MEALS EACH YEAR

+8% YOY

8th Biggest meal occasion in UK

+14% Growth by 2029

QMS&S AUTHENTIC £79M

+7% YOY | +77% L5Y

Authentic is 14% share of QMS&S

So Much Headroom

NISSIN IS #1 AUTHENTIC QMS&S

£52M RSV | +133% L3Y

Nissin is 64% share of Authentic

Driving Sector Growth

SO HOW Can WE SUPPORT?



GET YOUR CORE RANGE RIGHT



Batchelors Super Noodles Chicken Pot 75g



Noodles BBQ Beef Pot 75g



Noodles Chicken 90g



Noodles BBQ Beef 90g



Batchelors Super Noodles Mild Curry 90g



110g

Chicken and Vegetable

support MCR & Core range

Internal planogram

leaflets and documents

Strong portfolio of insights and data, including our own internal AAA surveys.



Batchelors Cup A Soup Creamy Potato and Leek 107g

Classic 109g



Batchelors Pasta 'n Sauce Cheese & Broccoli Pot 65g

Nissin Soba Classic Pot

Noodle 90g

Creating excitement around events such as Japan week



Batchelors Pasta 'n Sauce Chicken & Mushroom 99g

Nissin Soba Chilli Pot

Noodle 92g



Batchelors Pasta 'r Sauce Cheese & Broccoli 99g

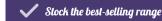


Batchelors Pasta 'n' Sauce Mac n Cheese 99g



Batchelors Super Rice Golden 99g





48% of shoppers are on a 'top up' mission when visiting a convenience store, so make sure you've got brands that shoppers will recognise

✓ Offer the complete solution

With 1 in 5 shoppers looking for a meal this evening, provide meal ideas by ranging Cooking Sauces alongside pasta, rice or noodles.

Create disruptive displays

Use eye-catching point of sale material to capture shopper attention. Freestanding display units are a great way dsirupt the shopper and drive incremental sales.

Maximise your offering

Target key calendar events - such as Chinese New Year, National Curry Week and Diwali - with our range of sauces to drive additional sales



