SALAD DRESSINGS CATEGORY UPDATE

NEILSENIQ DATA TO 25.01.25

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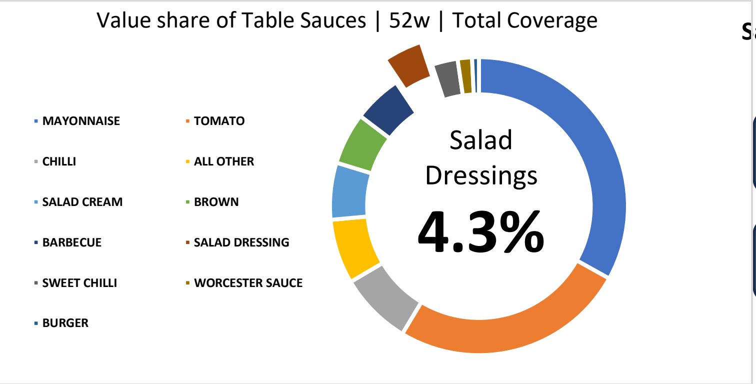
UK Salad Dressings Category summary | January 2025

Dressings sales static year on year



Salad Dressings sales change 52w

Value +0.5%

Units -0.6%

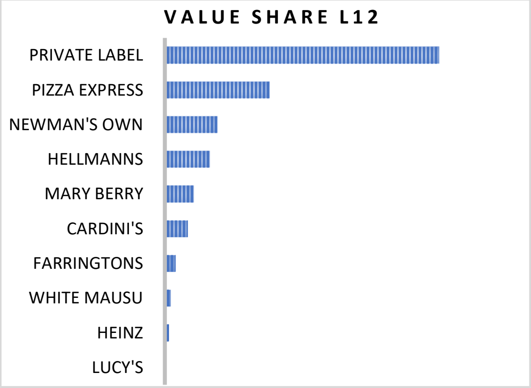
Buyer spend increases / Penetration flat

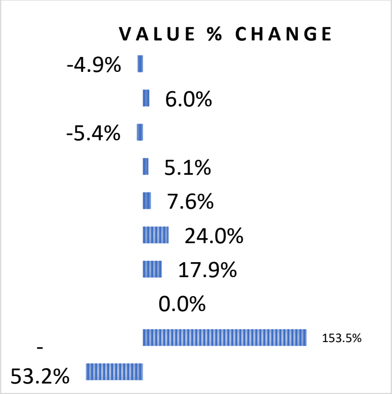
Penetration
29%
+0.0%

Spend per occasion
£5.11 P.A
+6.5%

Frequency
2.9 times p.a
+3.1%

Cardini's and Mary Berry's deliver category outperformance. Pizza Express leads while PL sales contract in the latest 12 wks

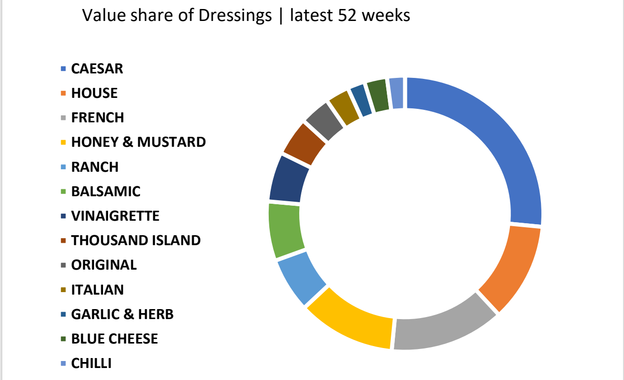


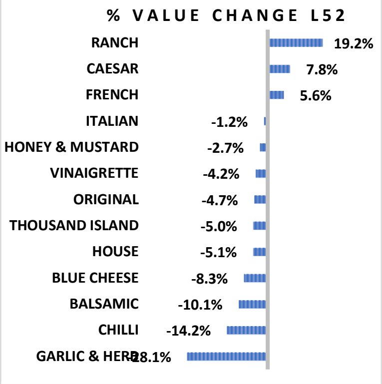


12w £ chg

-166,207
+70,098
-35,554
+25,968
+24,433
+52,685
+19,436
+73,462
+29,681
-22,636

Caesar stands apart as the favourite flavour and is driving the majority of growth | Ranch growth from NPD (PL)





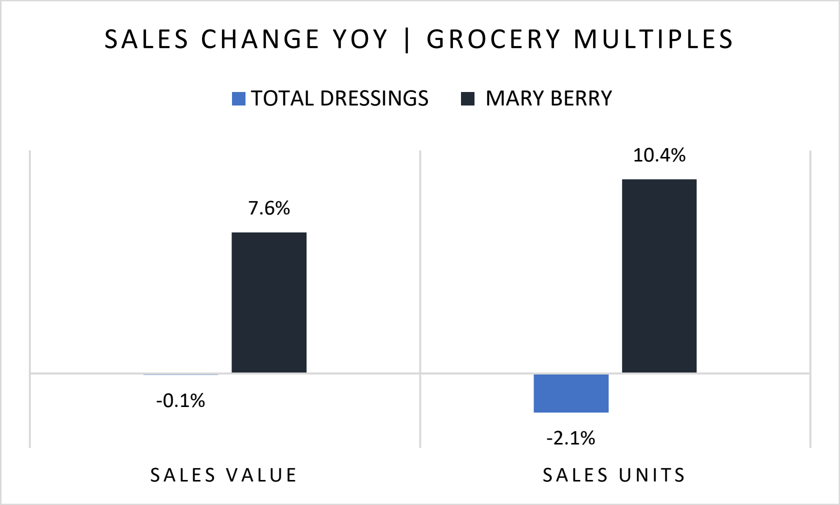
52w £ chg

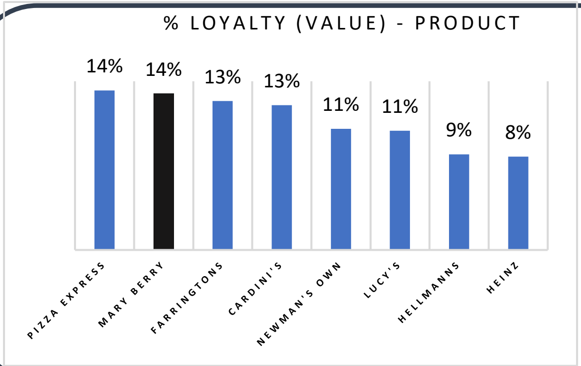
419,992
+773,761
+287,218
- 14,432
- 127,630
- 102,568
- 71,201
- 96,967
- 252,268
- 96,589
- 318,765
- 141,308
- 323,028

Source NielsenIQ w.e 25.01.25

Mary Berry's category headlines | January 2025

Mary Berry's delivers sustained growth and outperformance





2nd Highest Category loyalty

Loyal shopper base means a high repeat purchase and resilience against changing market conditions

Some of the best selling Dressings SKUs

10th

Best selling branded dressings sku (of 119)

+24%

Value growth
Unit growth +23%
L52

#1

Selling Blue Cheese Dressing SKU / 67% of Blue cheese sales . Val +24% Units +24% L52

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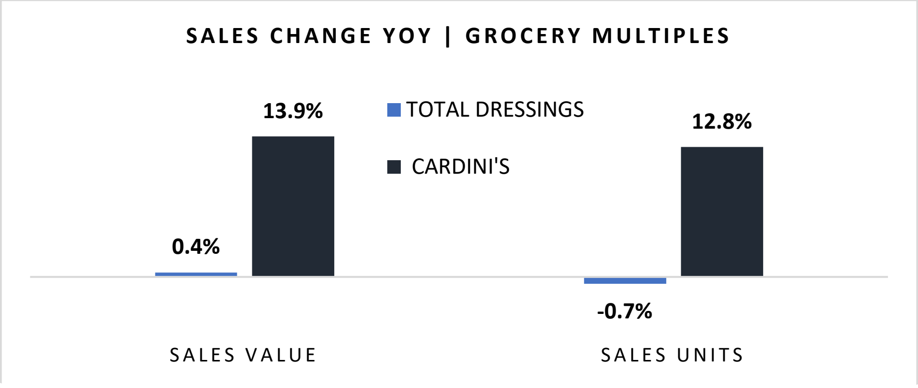
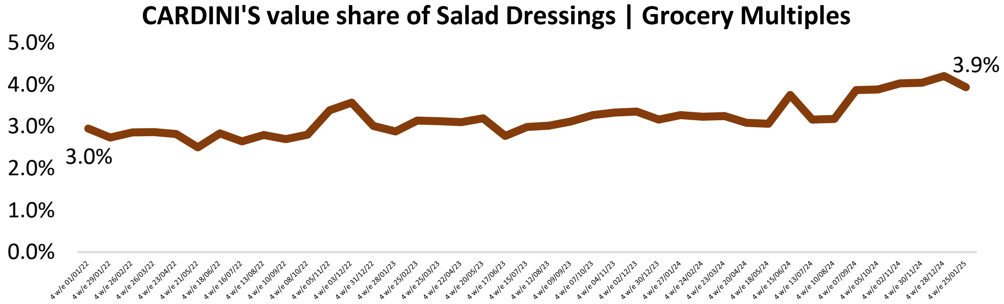
Source NielsenIQ w.e 25.01.25

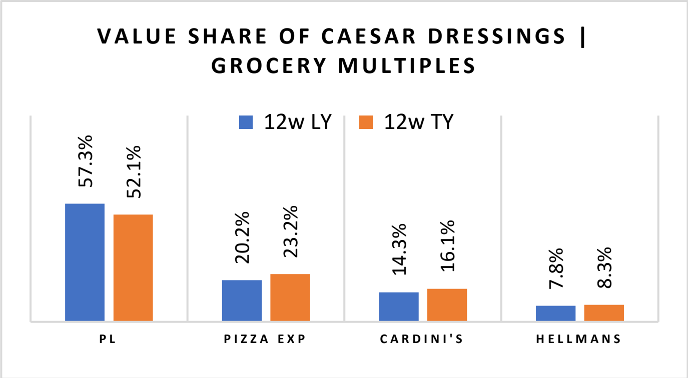
Cardini’s delivers sustained growth and outperformance



Sustained share growth



Contributing to growth in Caesar Dressings

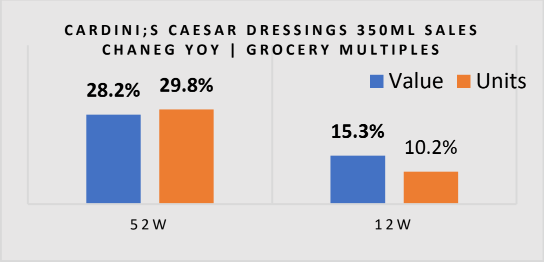


33%

Of value growth in Caesar dressings L12

Cardini’s Caesar 350ml a top seller

Sustained value and unit growth



A top seller

The **6th best selling** branded dressings sku in the UK

Source NielsenIQ w.e 25.01.25

TOTAL TABLE SAUCES

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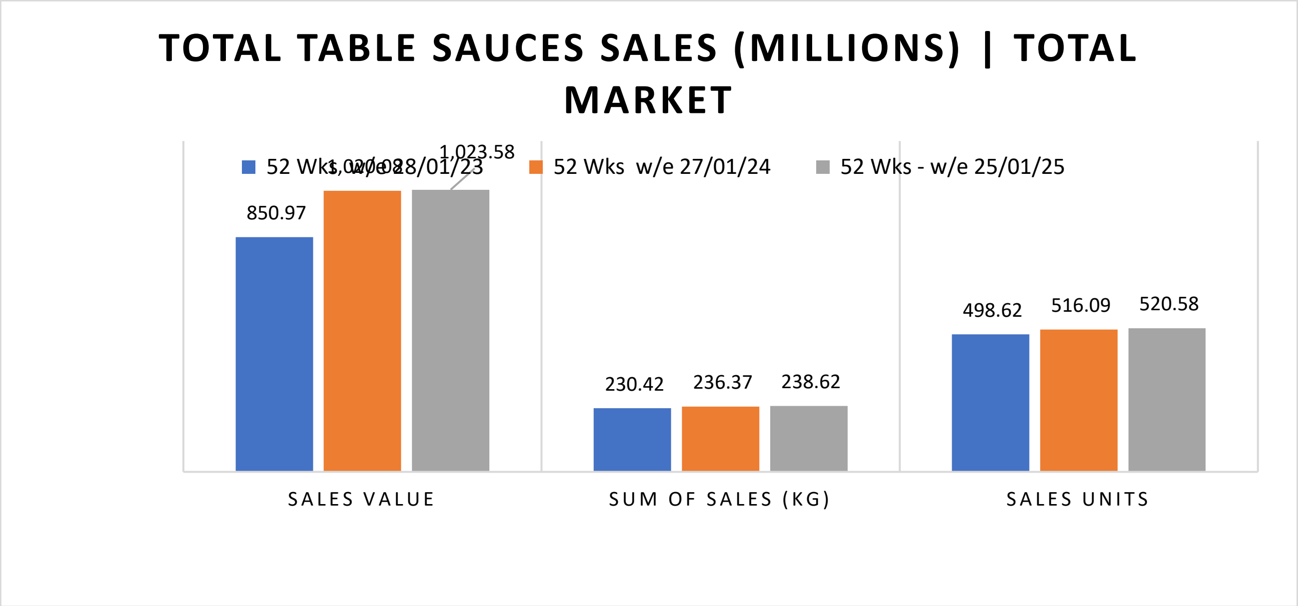
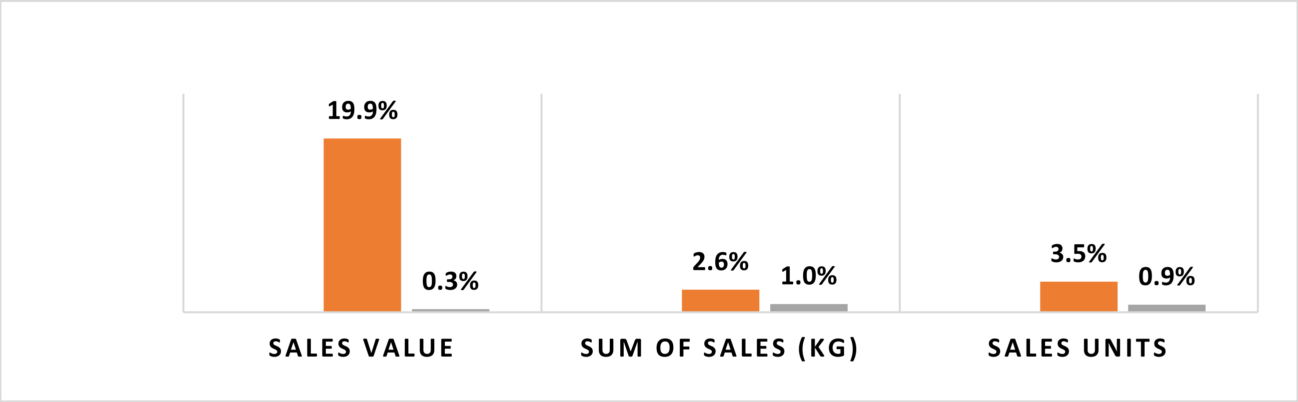
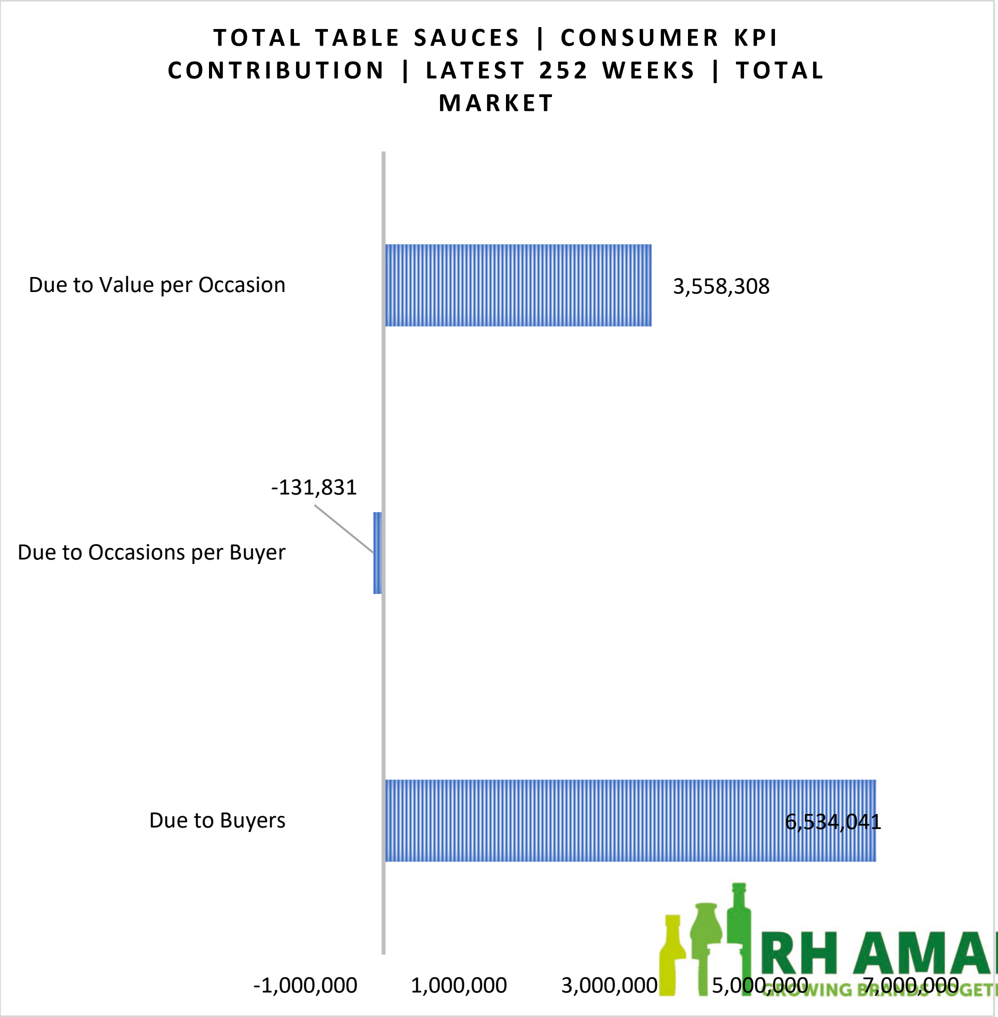
The table sauces category grew by just 1% year-over-year, there was an increase in both buyers and spending per buyer







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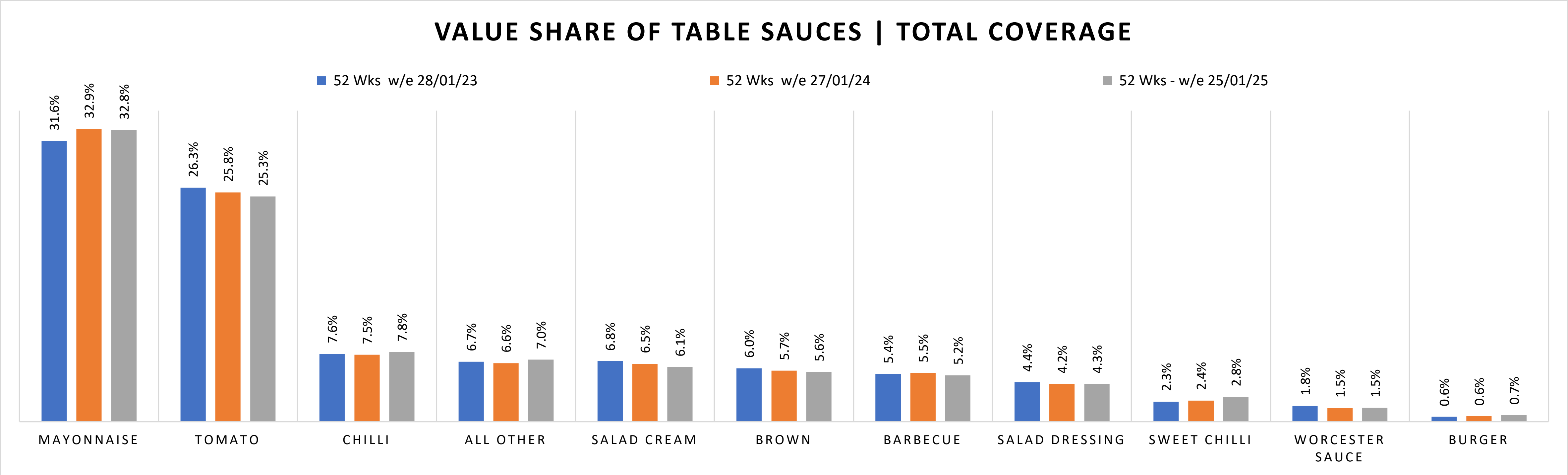
Source NielsenIQ w.e 25.01.25

Mayonnaise and Ketchup account for 60% of Table sauces sales. Ketchup has seen a long term decline. Dressings represent a small proportion of table sauces and is performing in line with the category



Sales £m's	336.02	259.39	80.35	71.34	62.84	57.15	53.43	43.57	28.58	15.82	7.52
£m's +/-	+0.10	-3.71	+3.50	+4.18	-3.57	-1.40	-2.57	+0.22	+4.31	+0.12	+1.15
% +/-	+0.03%	-1.4%	+4.6%	+6.2%	-5.4%	-2.4%	-4.6%	+0.5%	+17.8%	+0.8%	+18.0%

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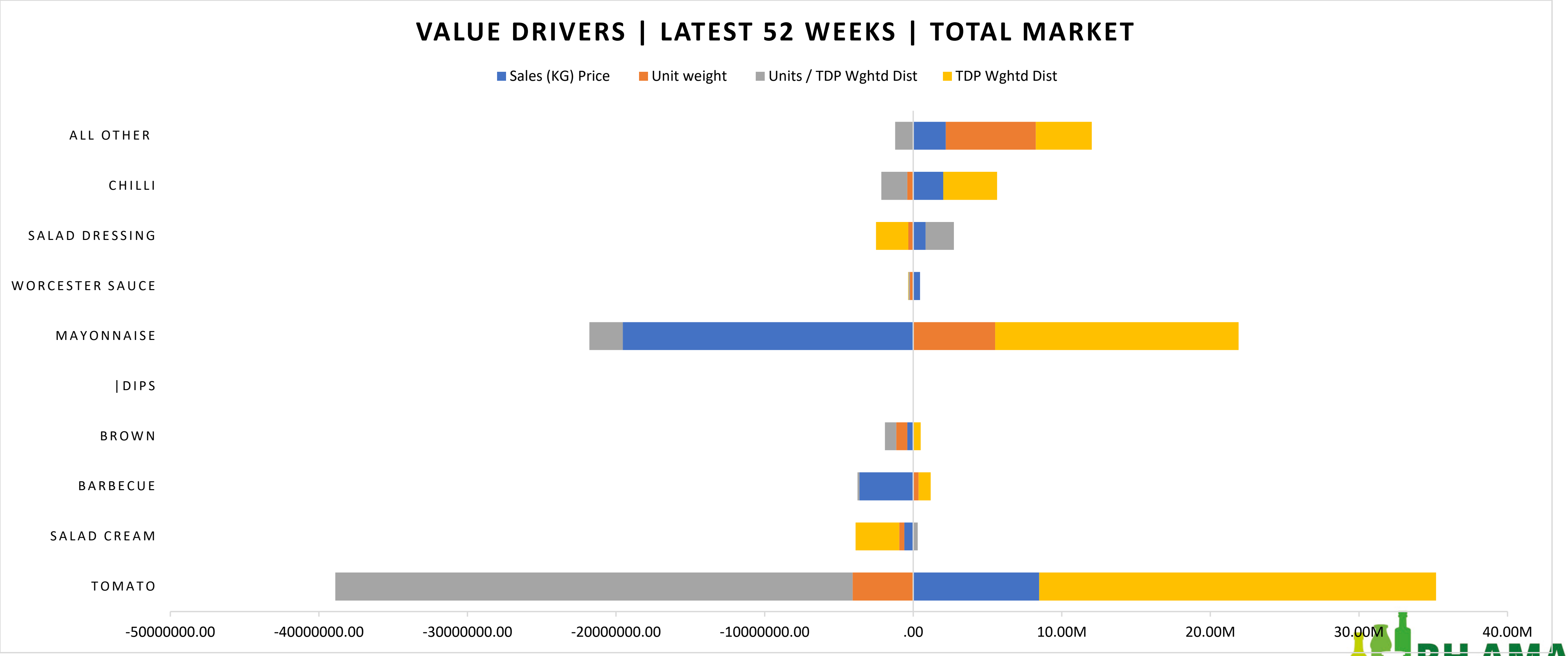
Source NielsenIQ w.e 25.01.25

Chilli and Sweet Chilli sauces were the best performers, while Ketchup declined due to price hikes. Mayonnaise gained distribution, though price cuts limited its growth.



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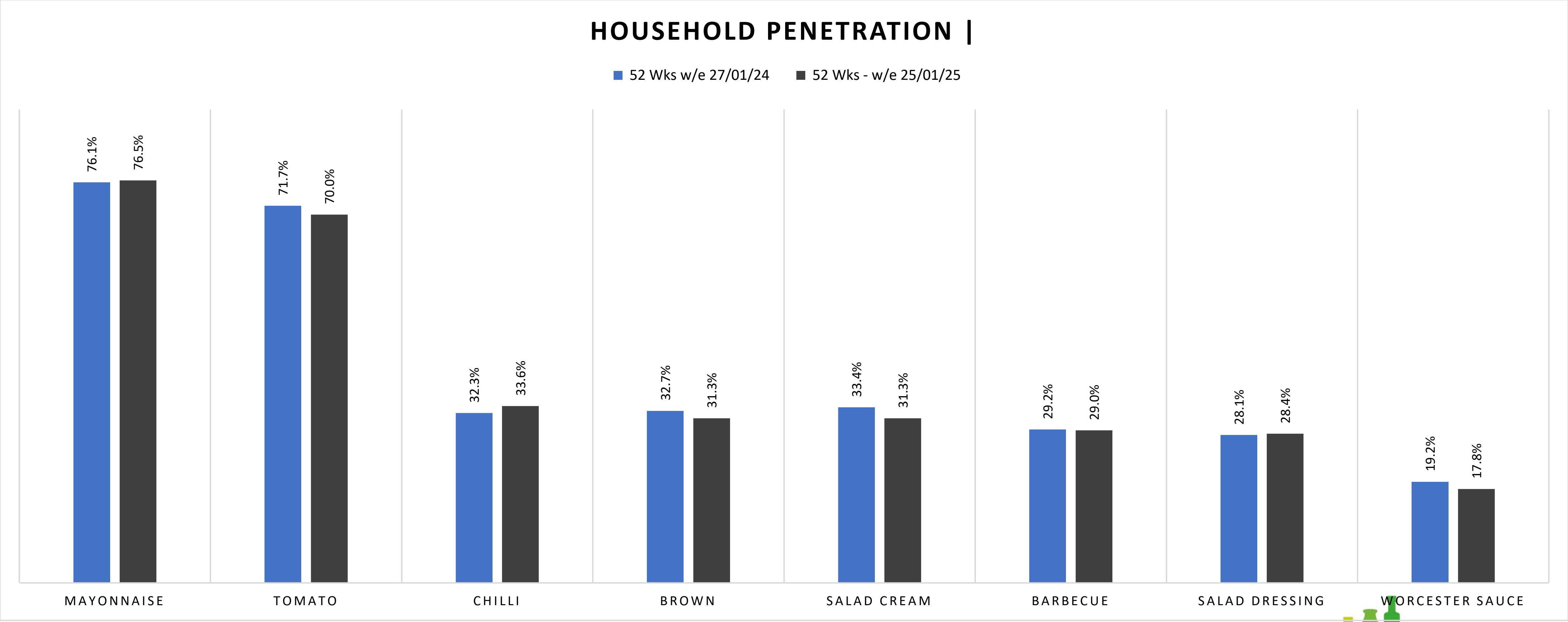
Source NielsenIQ w.e 25.01.25

Mayonnaise and Ketchup are the most widely purchased table sauces categories, Ketchup and Salad Cream saw the biggest drop in buyers YoY



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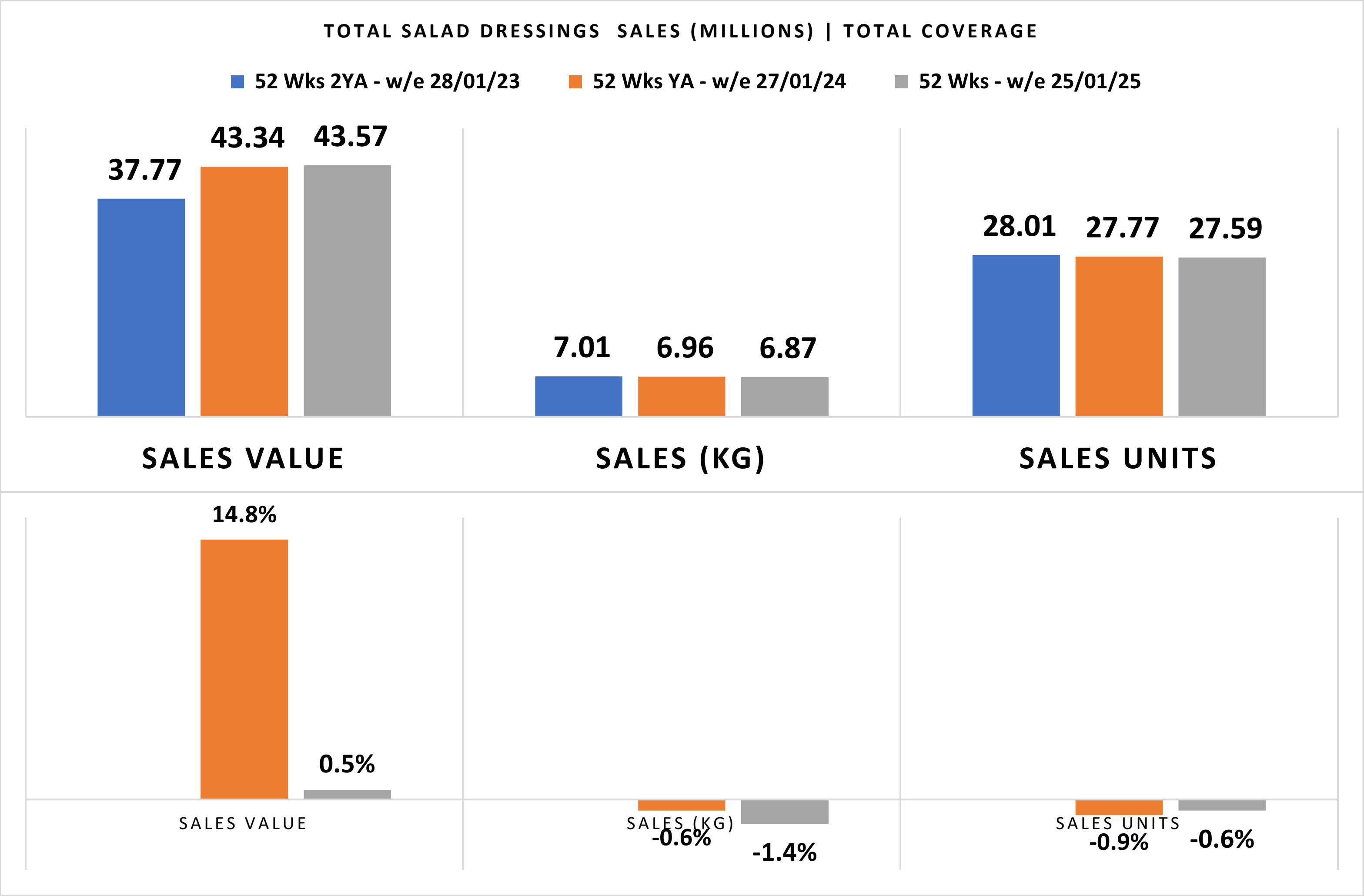
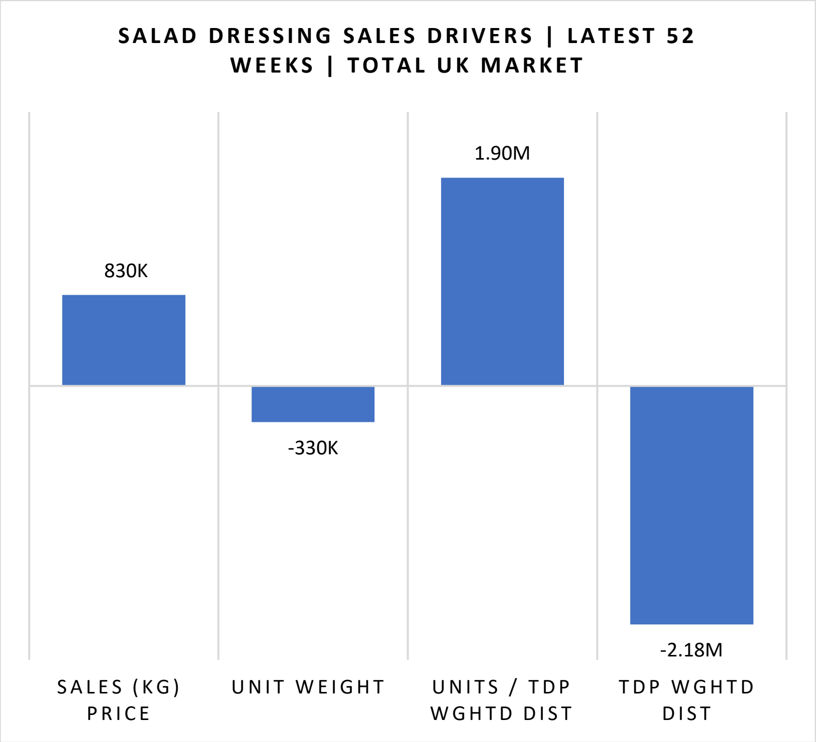
Source NielsenIQ w.e 25.01.25

SALAD DRESSINGS

Source NielsenIQ w.e 25.01.25

Growth from higher prices and increased spend was offset by reduced levels of distribution





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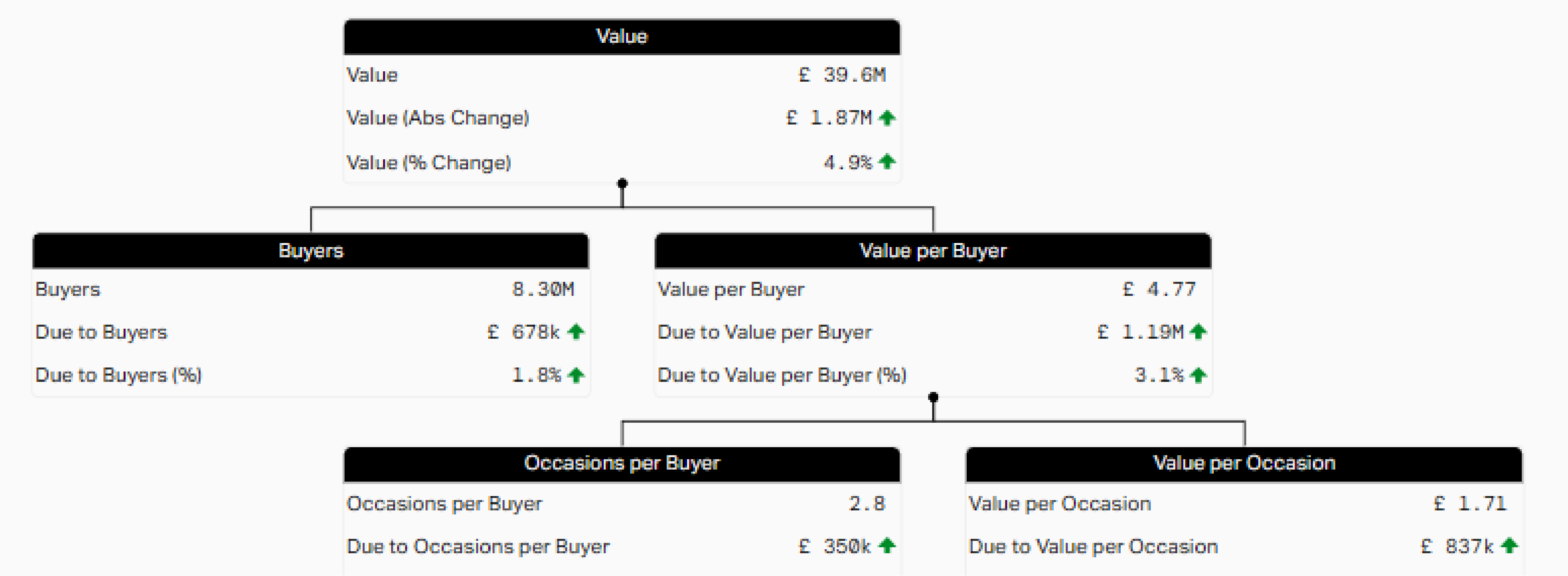
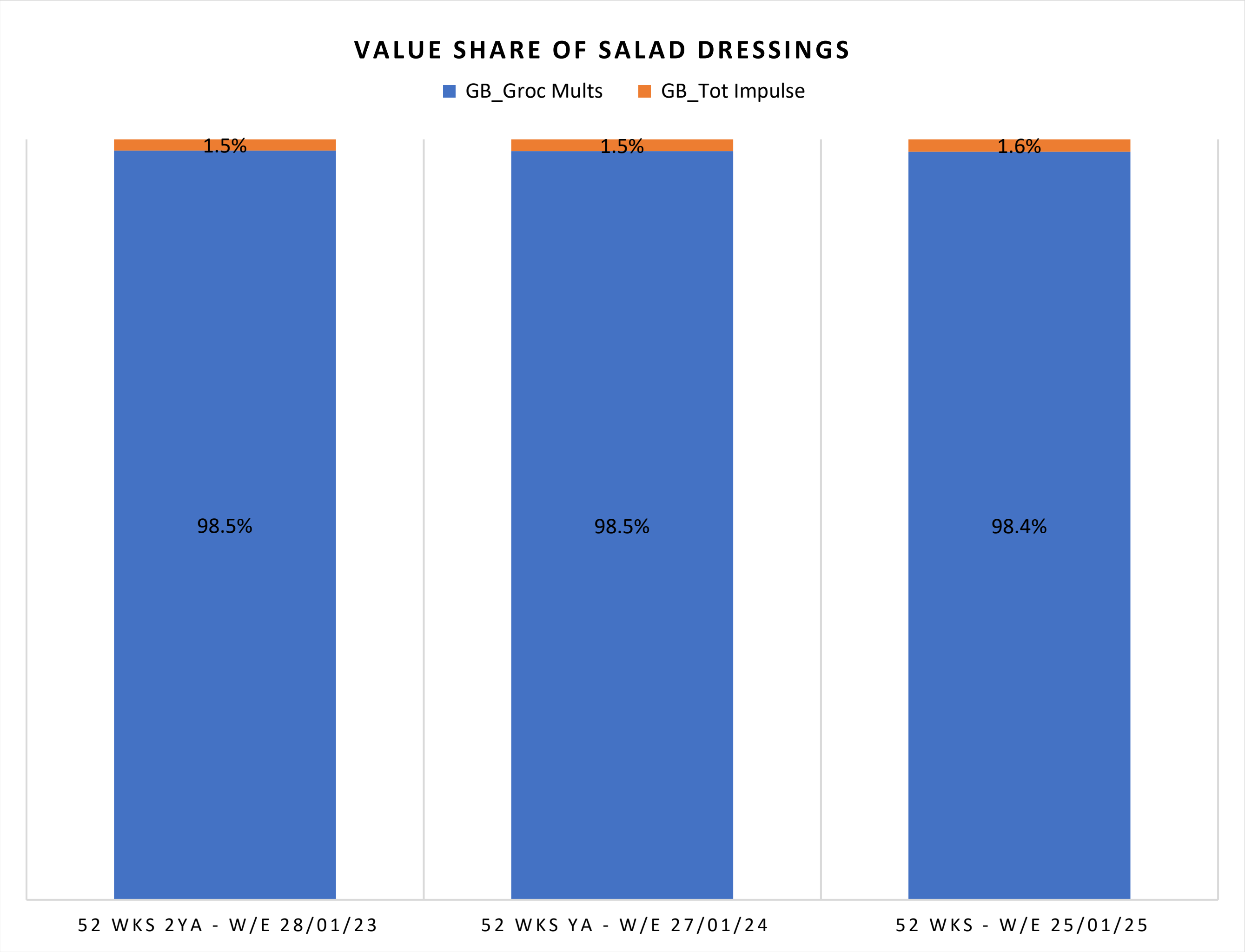
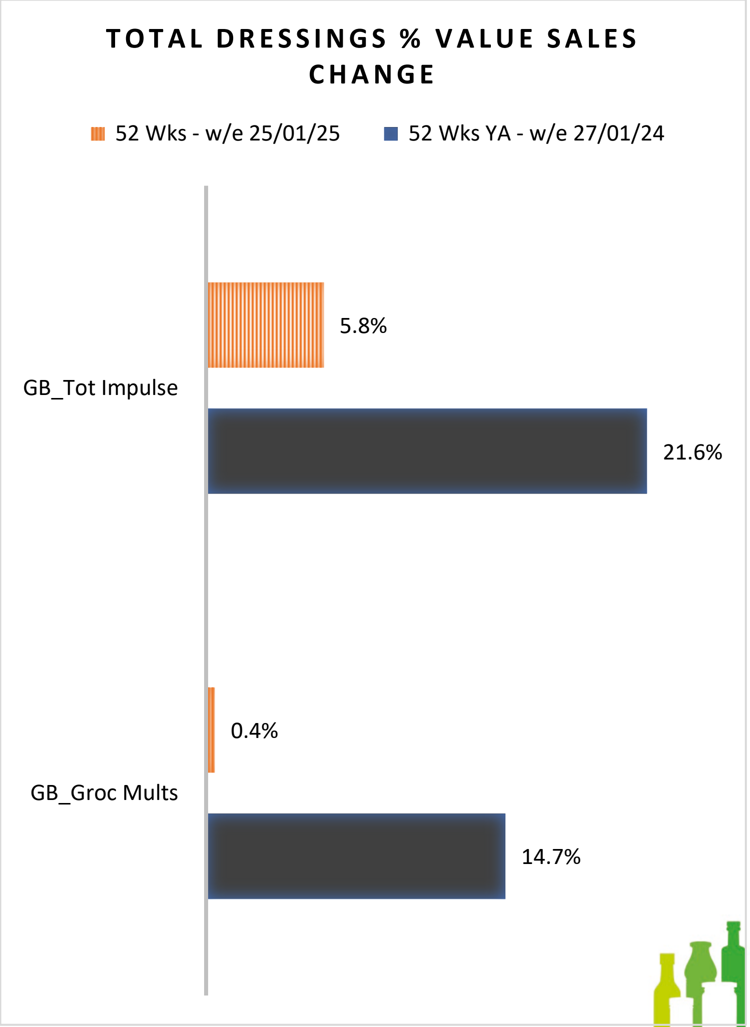
Source NielsenIQ w.e 25.01.25

Total Salad Dressings KPI tree | latest 52 weeks



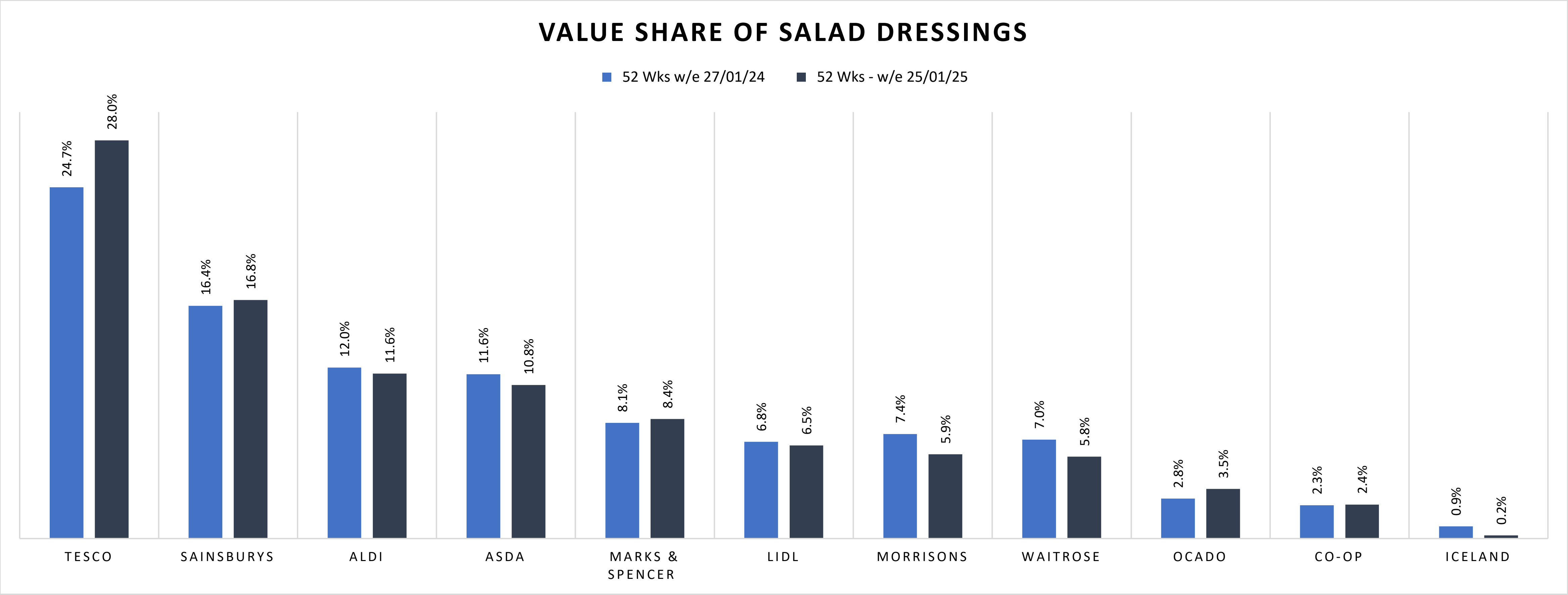
Major Multiples account for almost all Dressings sales | Growth in both channels slowed





Source NielsenIQ w.e 25.01.25

Tesco led the Salad Dressings market, with M&S also showing strong performance..



% Change	+16.9%	+5.7%	-0.5%	-3.7%	+6.5%	-0.8%	-17.0%	-14.6%	+28.4%	+5.3%	-73.8%

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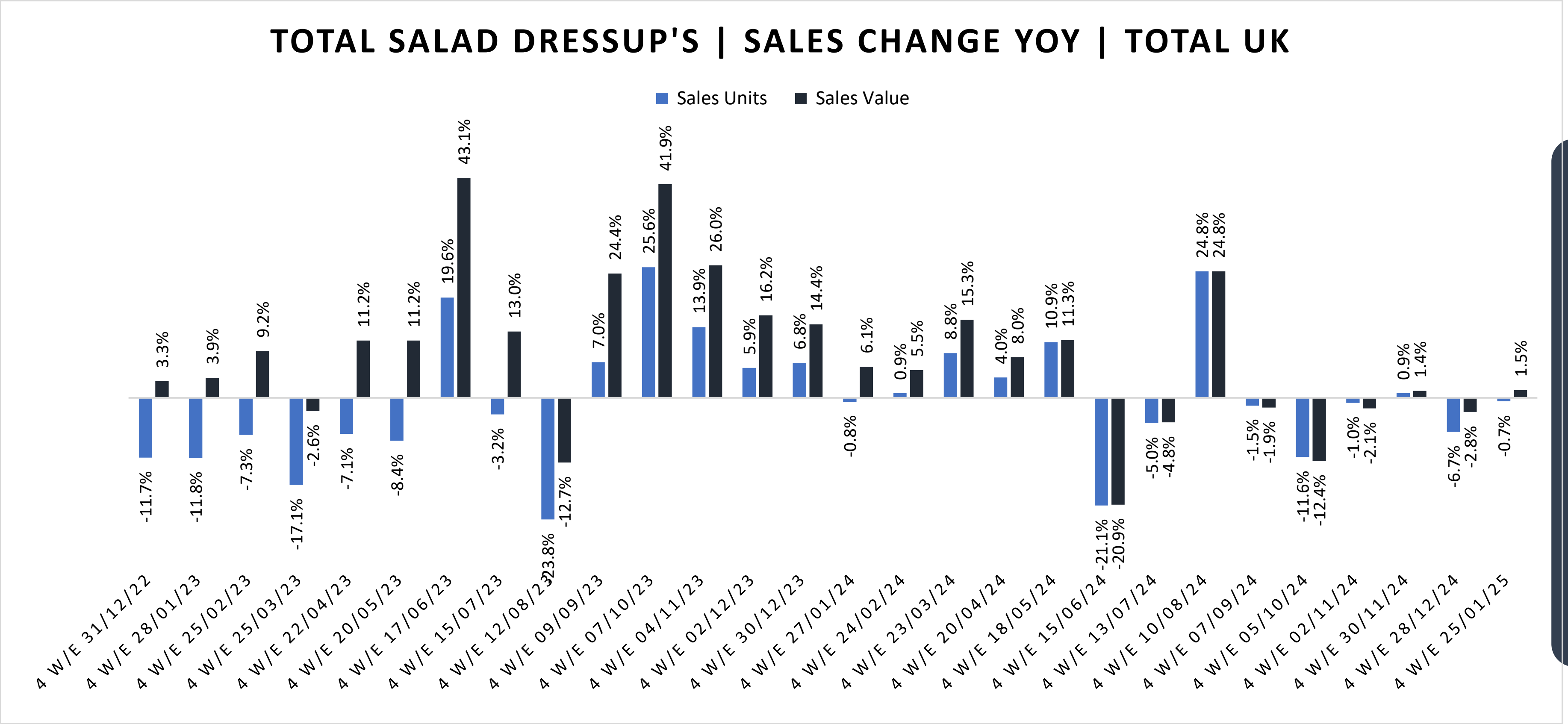
Source NielsenIQ w.e 25.01.25

Dressings sales impacted by cooler temperatures in June and July compared with 2023. The end of July / early August was characterized by warmer weather | The latest 12 weeks saw static sales vs the same period last year



12
week

Total Salad Dressings 12 w,e 02.11.24 vs SPLY

Value
-0.1%

Units
-2.1%

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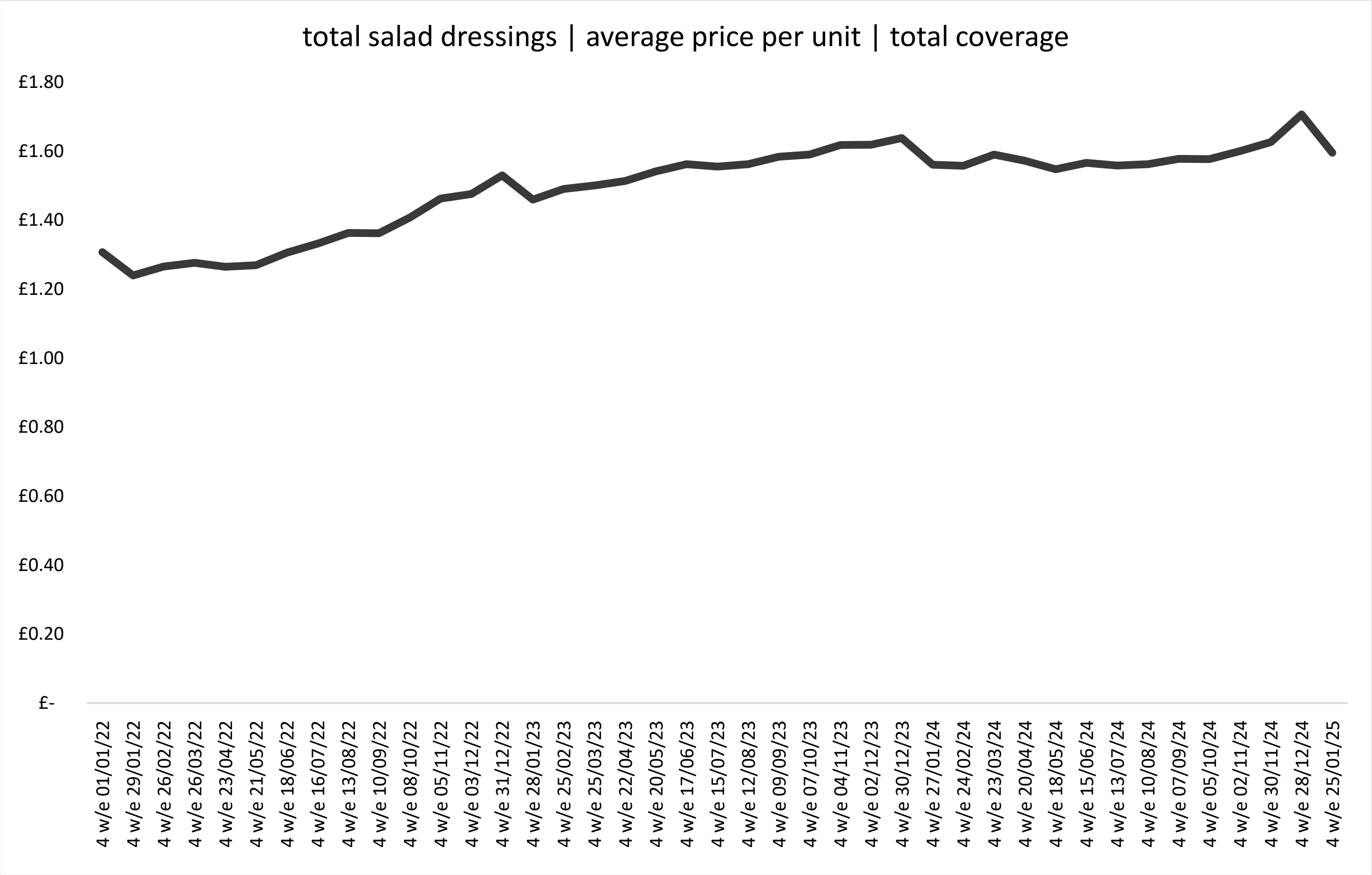
Price inflation in Salad Dressings has stabilized but did pick up again in the latest 2 periods



12 week

Total Salad Dressings average price per unit
12w.e

2022 £1.49
2023 £1.60 +7.9%
2024 £1.64 +2.2%

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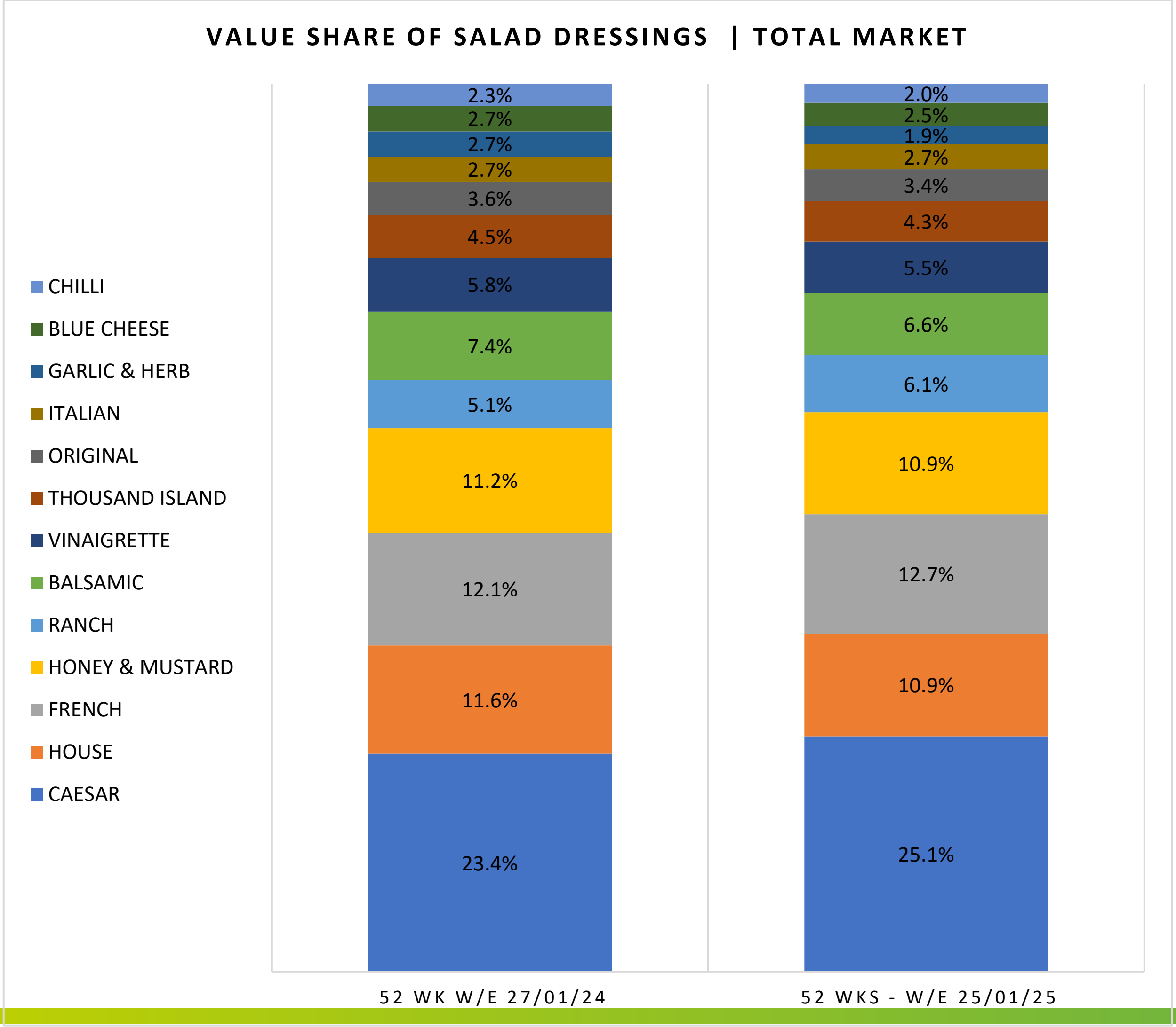
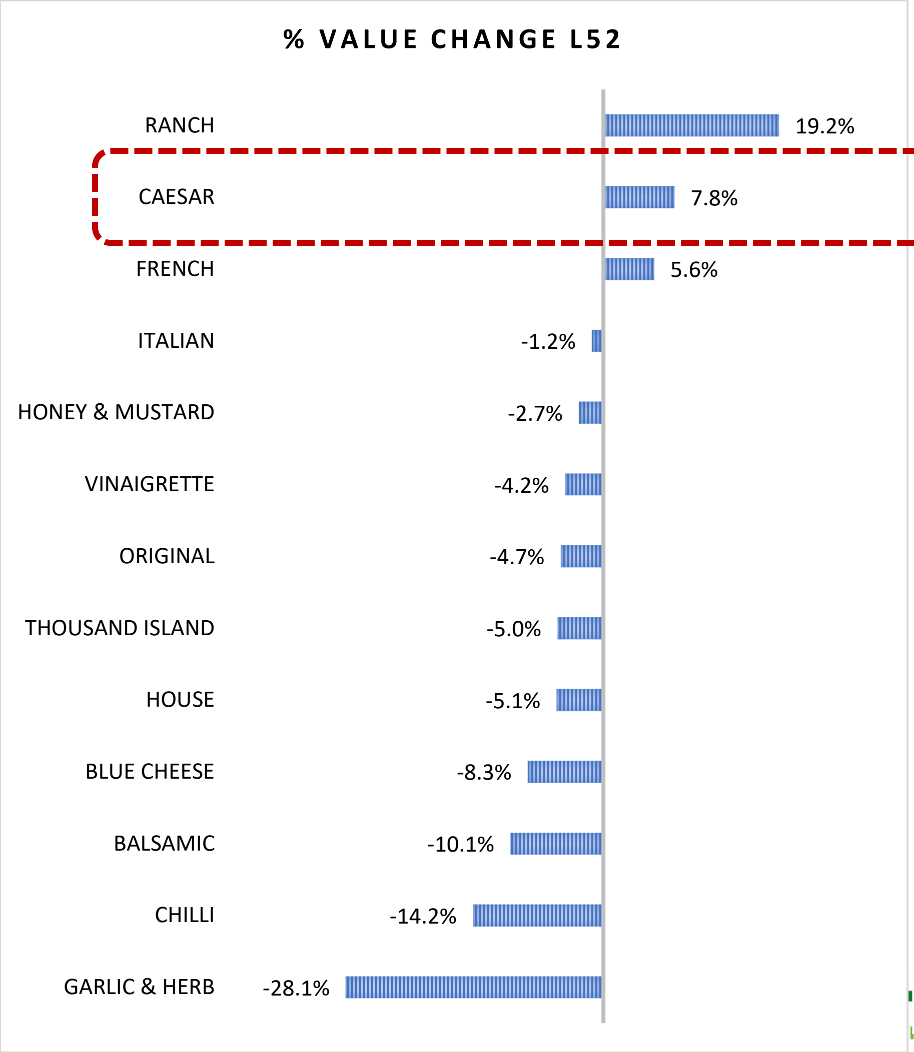
Source NielsenIQ w.e 25.01.25

Caesar maintains its role as consumer's favourite Salad Dressings flavour, accounting for a ¼ of sales and 34% of category growth. Ranch was the standout performer (NPD)





£ +/- 52w

+419,992
+773,761
+ 287,218
- 14,432
- 127,630
- 102,568
- 71,201
- 96,967
- 252,268
- 96,589
- 318,765
- 141,308
- 323,028

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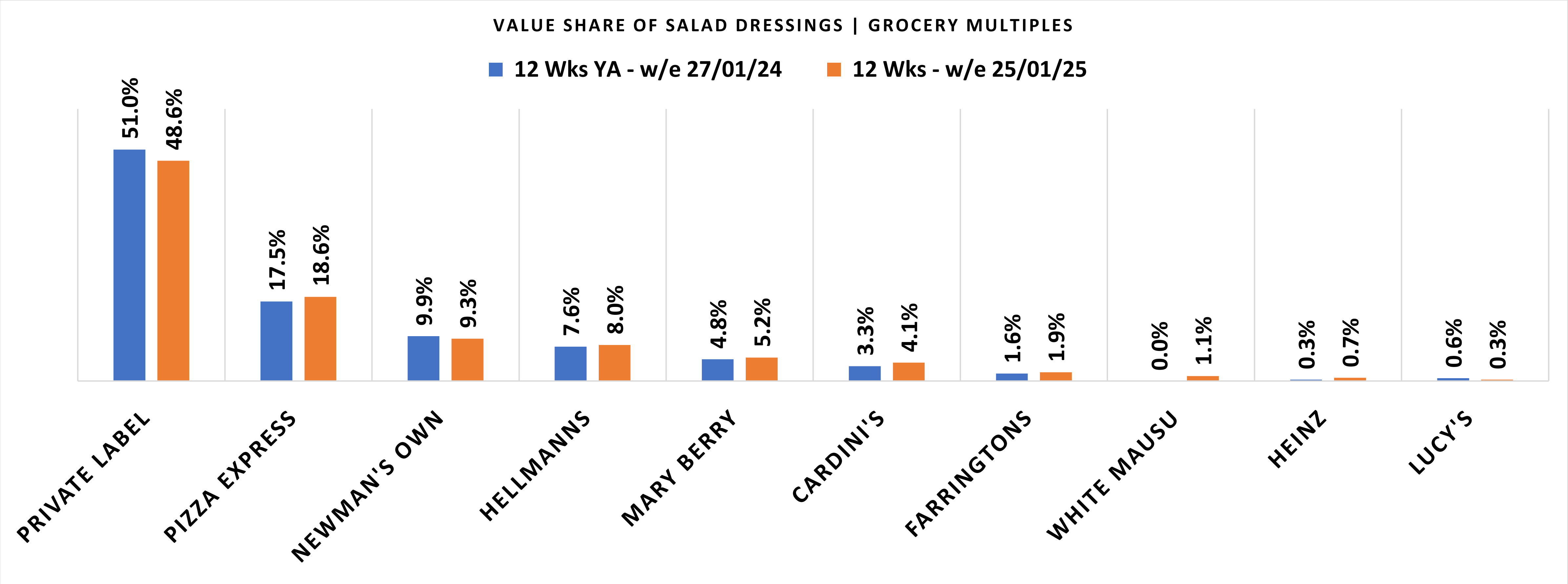
Shifting consumer preferences as brands outperform Private Label

Pizza Express, Mary Berry’s and Cardini’s the standout outperformers



L12 £ +/-	-166,207	+70,098	-35,554	+25,968	+24,433	+52,685	+19,436	+73,462	+ 29,681	-22,636
L12 % +/-	-4.9%	+6.0%	-5.4%	+5.1%	+7.6%	+24.0%	+17.9%	NEW	+153.5%	-53.2%

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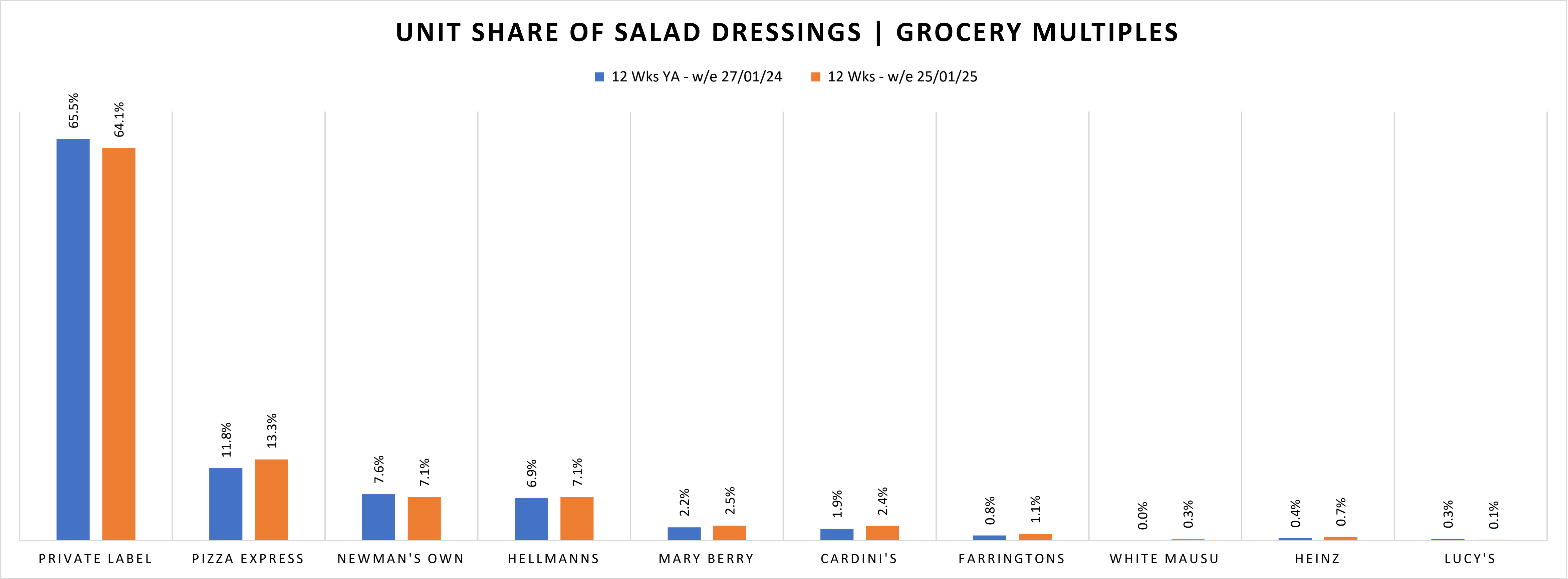
Source NielsenIQ w.e 25.01.25

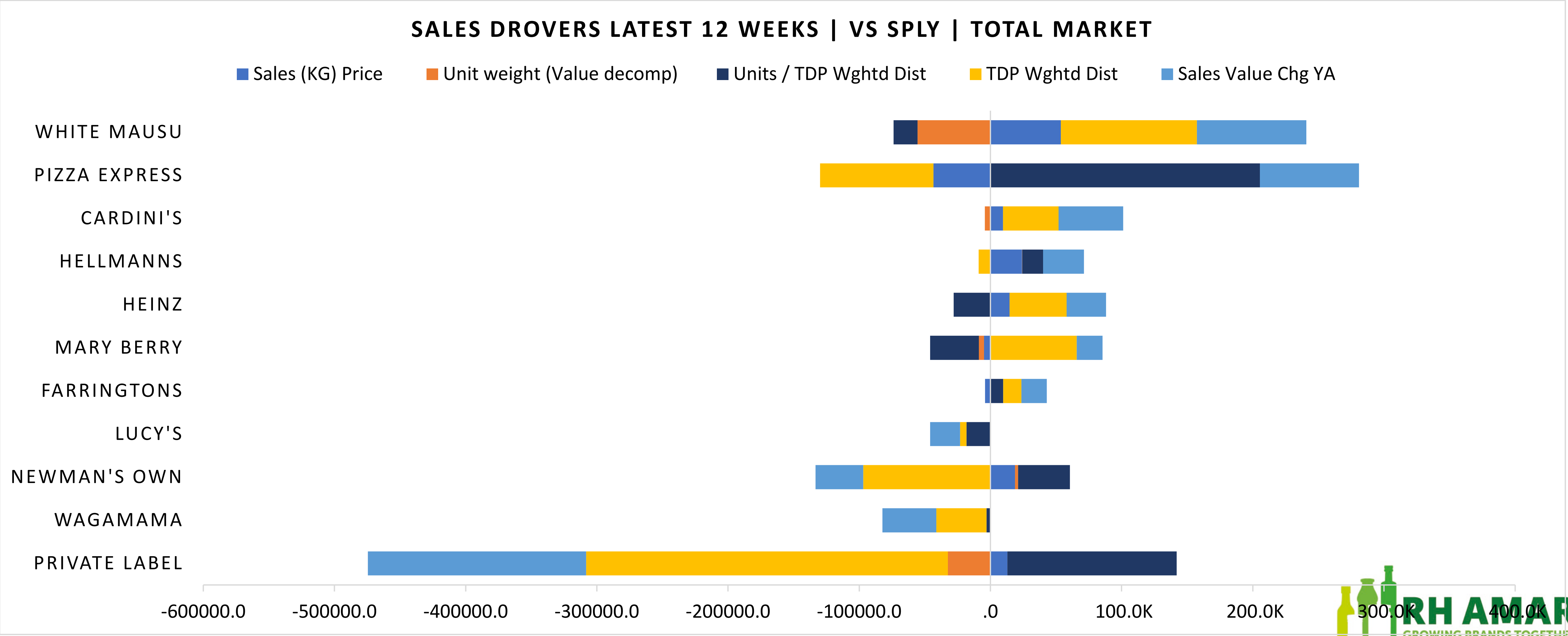
Private label is also losing to brands in Units sales terms



	Private Label	Pizza Express	Newman's Own	Hellmanns	Mary Berry	Cardini's	Farringtons	White Mausu	Heinz	Lucy's
L12 Un +/-	-118,475	+49,550	-26,496	+1,161	+9,555	+17,269	+7,805	+11,350	+10,051	-6,146
L12 % +/-	-4.3%	+10.0%	-8.3%	+0.4%	+10.4%	+21.4%	+22.0%	NEW	+60.2%	-53.7%

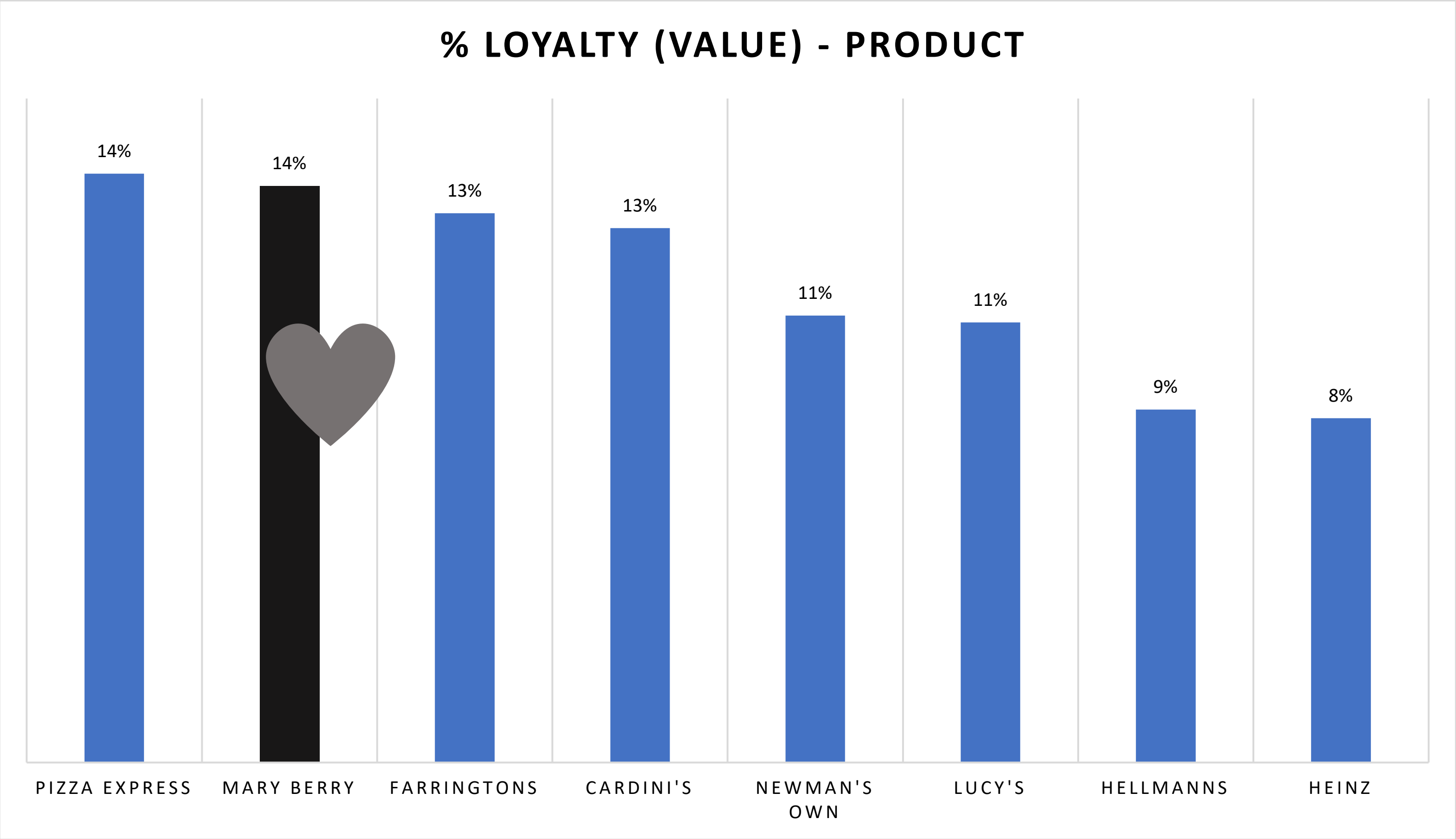
Source NielsenIQ w.e 25.01.25

Pizza Express saw a notable uptick in rate of sale, Cardini's was also one of the biggest drivers as distribution gains boost performance Mary Berry's was also bolstered by distribution gains



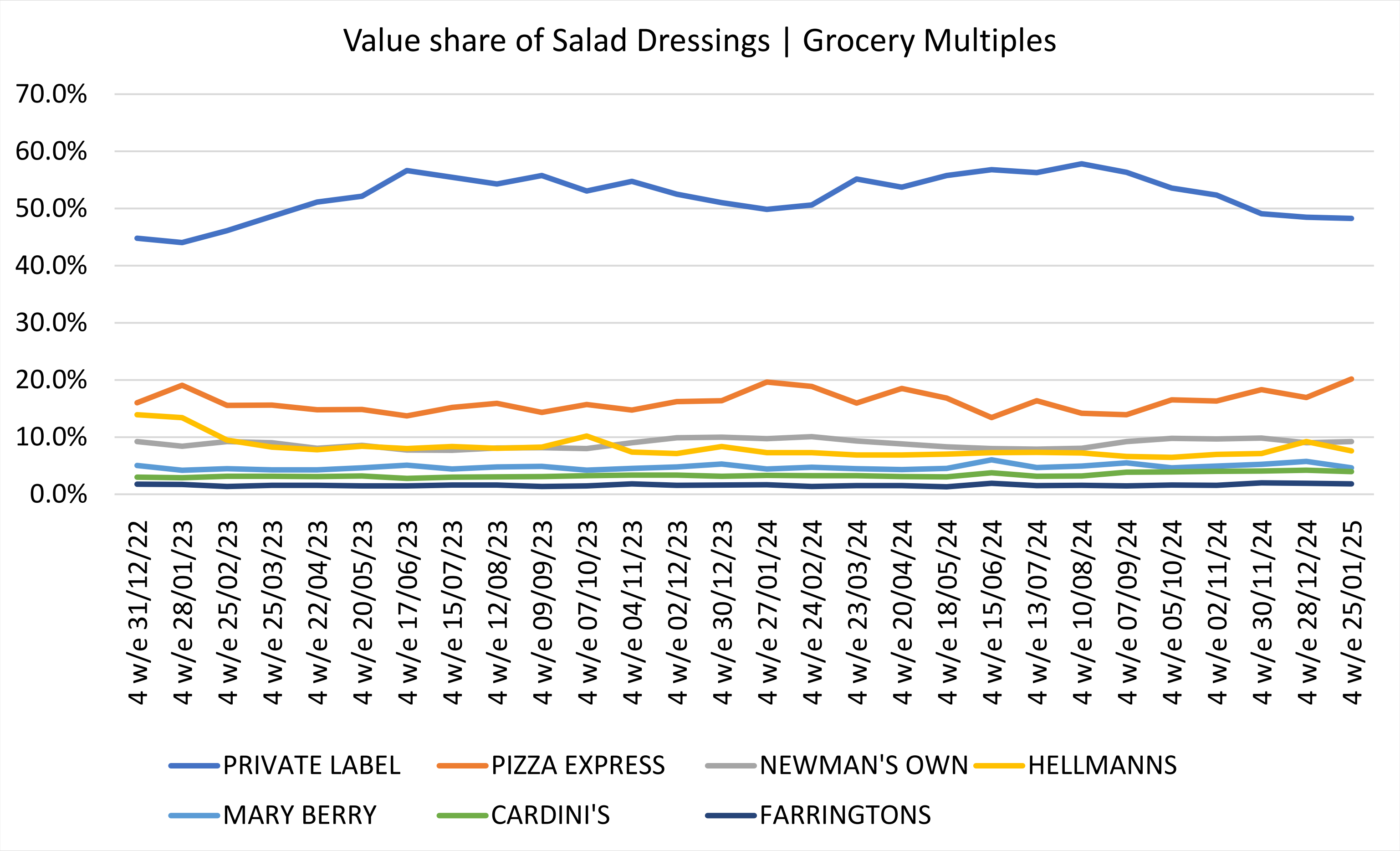
Source NielsenIQ w.e 25.01.25

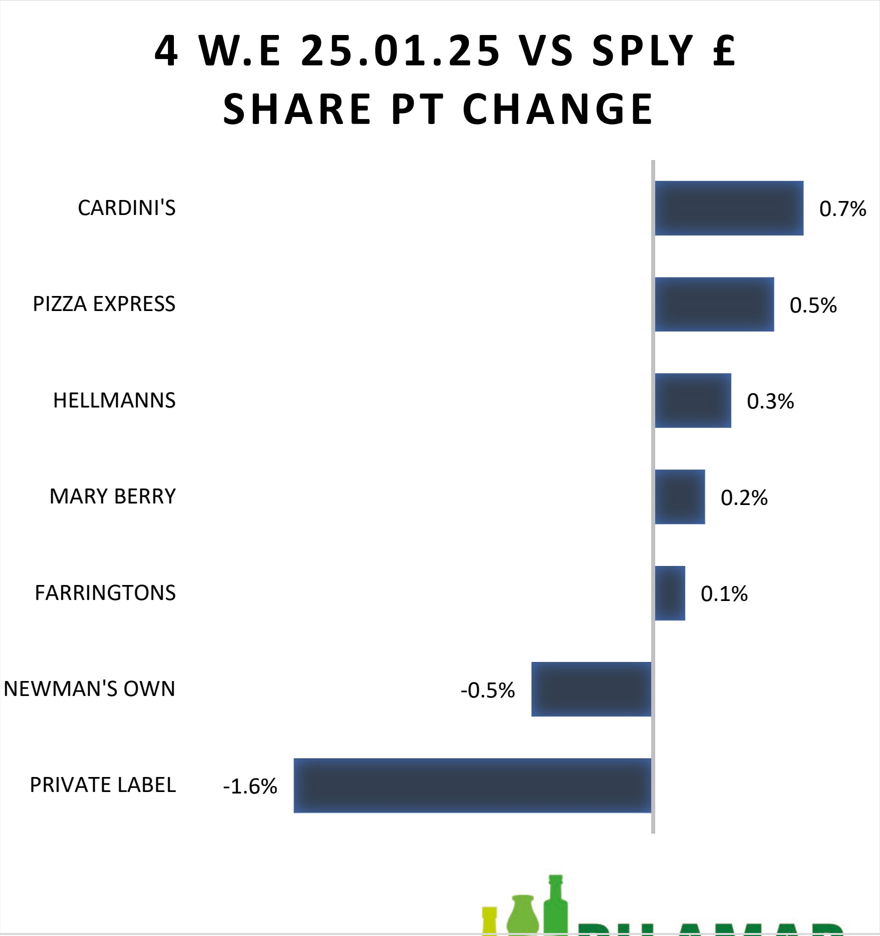
Mary Berry’s has the second most loyal shopper base, reinforcing its strong reputation for quality



Loyal shopper base means a high repeat purchase and resilience against changing market conditions

Private label share contracts over past 3 period as Cardini's and Pizza Express improve their share mix





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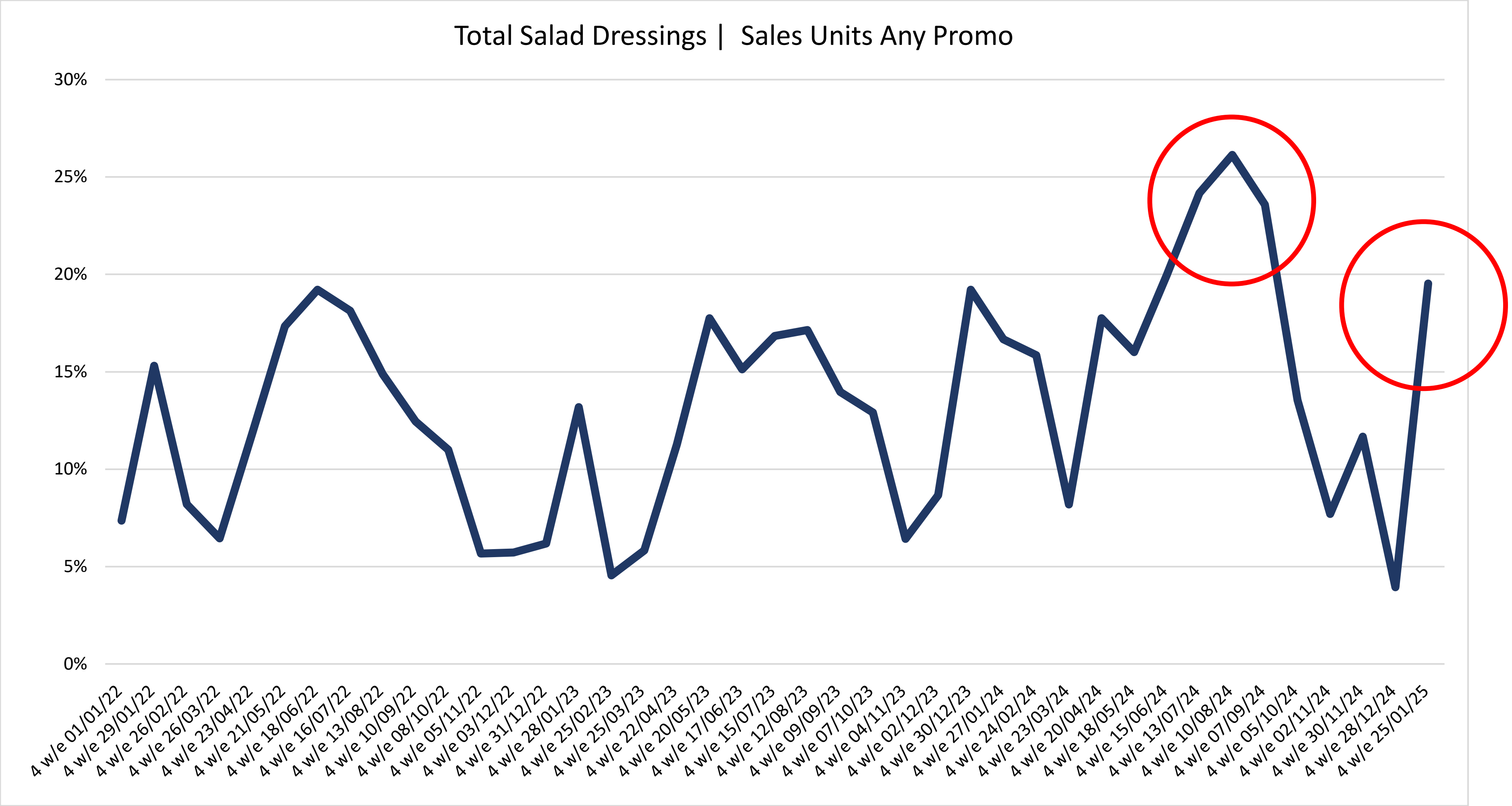
Source NielsenIQ w.e 25.01.25

Salad Dressings promotional activity is concentrated around the key summer season and the post Xmas healthy trend period



Promotional sales increased in the latest 52 weeks vs last year

18% (LY 14%)

57% of total Promotional sales for 2024 are made during June to Sep

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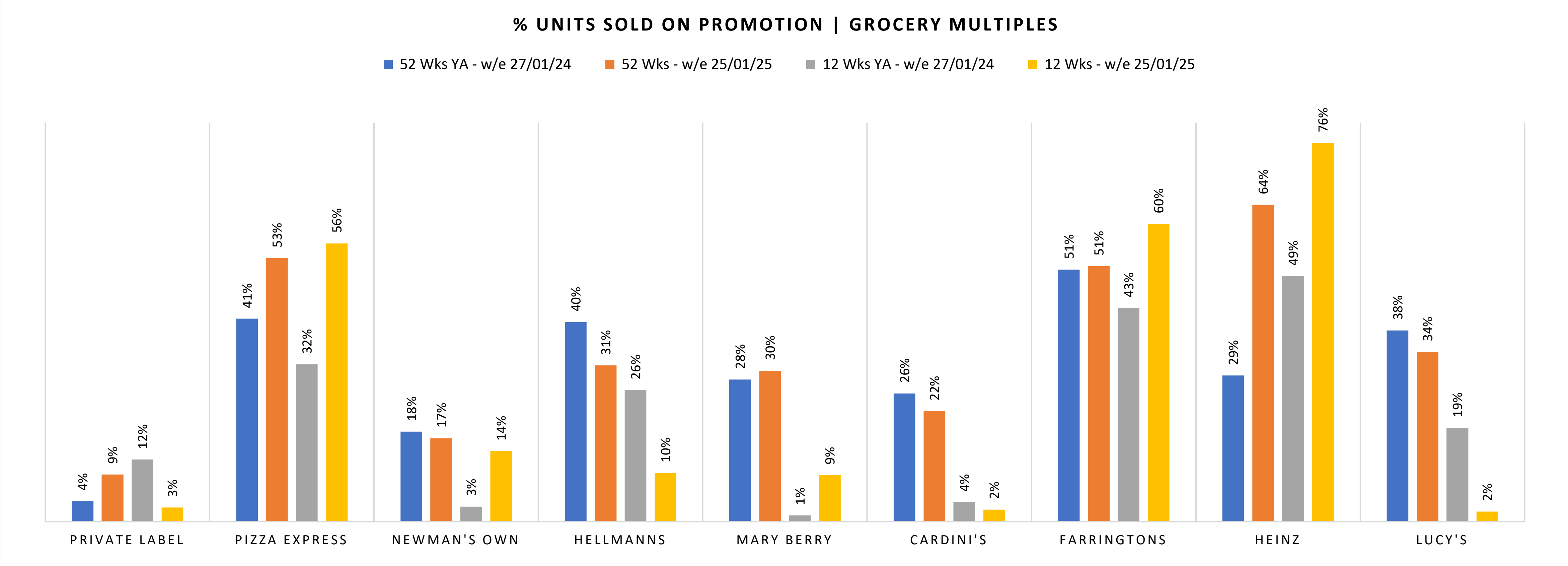
Source NielsenIQ w.e 25.01.25

Pizza Express, bolstered 12 week sales with increased promotional support. Cardini’s and Mary Berry’s 12 wk growth being achieved with minimal promotional support



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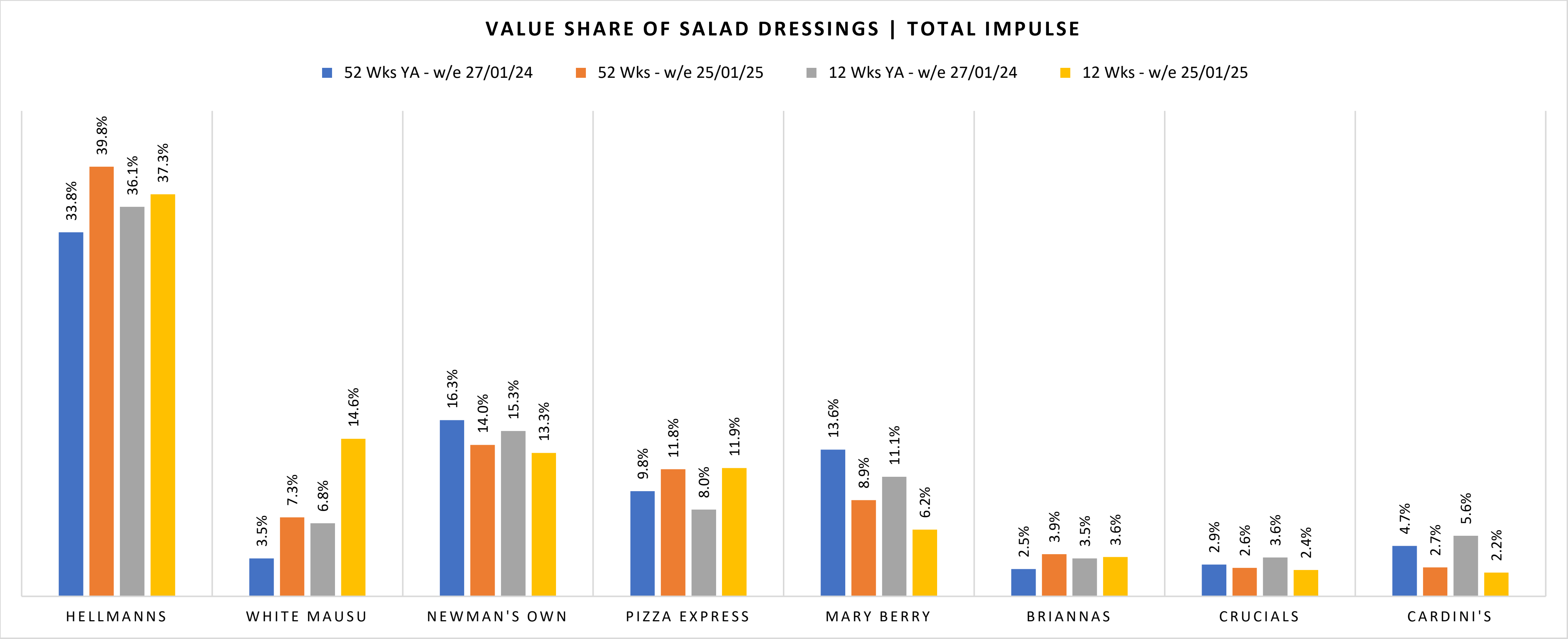
Source NielsenIQ w.e 25.01.25

Hellman's is the number one brand in the Impulse channel and increased its share



	HELLMANNS	WHITE MAUSU	NEWMAN'S OWN	PIZZA EXPRESS	MARY BERRY	BRIANNAS	CRUCIALS	CARDINI'S
52wk	24.8%	119.8%	-9.0%	27.6%	-30.7%	63.3%	-5.3%	-39.2%
12wk	13.1%	136.2%	-5.0%	62.2%	-38.8%	13.7%	-25.7%	-57.1%

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Top 30 Selling Salad Dressings SKUs | Grocery Multiples GB

	Rank	Value Sales L12	% Change	Unit Sales L12	% Change	APPU L12	% Change	WTD Unit RoS	WTD £ RoS	% Unit on Promo L12	Change
PIZZA EXPRESS LIGHT DRESSING HOUSE LIGHT 235 ML	1	499,555	-2.6%	217,071	1.3%	£ 2.30	-3.8%	1.90	£ 4.37	52%	23%
PRIVATE LABEL CAESAR 250 ML	2	414,557	-0.2%	457,936	-0.9%	£ 0.91	0.8%	3.64	£ 3.30	1%	-15%
PIZZA EXPRESS DRESSING CAESAR 235 ML	3	382,479	26.6%	167,839	32.5%	£ 2.28	-4.5%	1.58	£ 3.60	61%	29%
NEWMAN'S OWN DRESSING RANCH 250 ML	4	344,495	0.6%	157,948	-5.3%	£ 2.18	6.2%	1.71	£ 3.73	7%	5%
PRIVATE LABEL HONEY & MUSTARD 250 ML	5	295,480	-2.2%	313,557	-2.5%	£ 0.94	0.4%	2.58	£ 2.43	5%	-6%
PRIVATE LABEL FRENCH 250 ML	6	219,737	-3.9%	223,987	-4.4%	£ 0.98	0.5%	2.11	£ 2.07	2%	-11%
HELLMANNS REAL DRESSING & DIP THOUSAND ISLAND 250 MI	7	205,277	0.8%	119,538	1.4%	£ 1.72	-0.6%	1.30	£ 2.24	12%	-12%
PRIVATE LABEL BALSAMIC 255 ML	8	197,483	22.4%	103,599	19.5%	£ 1.91	2.4%	1.07	£ 2.03	3%	-8%
PIZZA EXPRESS DRESSING HOUSE 235 ML	9	195,687	3.4%	86,593	7.5%	£ 2.26	-3.8%	1.10	£ 2.49	54%	20%
PRIVATE LABEL VINAIGRETTE 250 ML	10	194,191	-3.3%	237,231	-2.1%	£ 0.82	-1.1%	2.54	£ 2.08	2%	-24%
PRIVATE LABEL HONEY & MUSTARD 235 ML	11	172,717	3.5%	77,900	8.4%	£ 2.22	-4.5%	5.14	£ 11.39	1%	-4%
CARDINI'S DRESSING CAESAR 350 ML	12	160,972	15.3%	56,353	10.2%	£ 2.86	4.6%	1.02	£ 2.92	3%	-1%
NEWMAN'S OWN DRESSING ITALIAN 250 ML	13	157,225	-7.2%	73,487	-10.7%	£ 2.14	3.9%	0.81	£ 1.73	12%	10%
PRIVATE LABEL THOUSAND ISLAND 250 ML	14	154,438	-8.3%	171,926	5.6%	£ 0.90	-13.2%	1.92	£ 1.72	1%	0%
PRIVATE LABEL FRENCH 235 ML	15	150,725	24.5%	65,486	24.9%	£ 2.30	-0.3%	4.76	£ 10.95	1%	-5%
HELLMANNS REAL DRESSING & DIP CAESAR 250 ML	16	138,623	18.0%	68,849	3.5%	£ 2.01	14.1%	1.88	£ 3.79	2%	-31%
PIZZA EXPRESS DRESSING HONEY & MUSTARD 235 ML	17	133,160	7.6%	59,730	8.9%	£ 2.23	-1.2%	0.89	£ 1.98	61%	24%
HELLMANNS FAT FREE VINAIGRETTE VINAIGRETTE 250 ML	18	128,307	0.2%	73,037	-0.9%	£ 1.76	1.1%	0.83	£ 1.46	15%	-3%
MARY BERRY LIGHT DRESSING ORIGINAL 235 ML	19	127,940	-4.1%	36,522	-4.1%	£ 3.50	0.0%	0.59	£ 2.06	4%	2%
PRIVATE LABEL CREAMY CAESAR 235 ML	20	125,029	13.7%	56,126	18.4%	£ 2.23	-4.0%	7.01	£ 15.61	1%	-7%
PRIVATE LABEL CAESAR 235 ML	21	107,979	24.1%	48,992	32.0%	£ 2.20	-6.0%	3.35	£ 7.38	1%	-5%
PRIVATE LABEL GARLIC & HERB 250 ML	22	107,300	-5.1%	106,396	-5.3%	£ 1.01	0.2%	1.64	£ 1.66	1%	1%
PRIVATE LABEL FRENCH 225 ML	23	104,656	14.5%	50,356	15.8%	£ 2.08	-1.2%	1.12	£ 2.32	2%	1%
CARDINI'S DRESSING CAESAR 250 ML	24	103,288	42.8%	39,637	44.6%	£ 2.61	-1.3%	1.09	£ 2.83	2%	-2%
PRIVATE LABEL FRENCH 255 ML	25	96,155	-16.5%	54,009	-15.3%	£ 1.78	-1.4%	1.86	£ 3.30	9%	-1%
MARY BERRY DRESSING BLUE CHEESE 235 ML	26	92,711	10.8%	26,811	11.5%	£ 3.46	-0.7%	0.60	£ 2.06	3%	3%
PRIVATE LABEL CAESAR 255 ML	27	88,643	4.3%	48,404	-1.7%	£ 1.83	6.1%	1.63	£ 2.99	4%	-16%
MARY BERRY DRESSING ORIGINAL 235 ML	28	87,017	5.6%	24,749	5.6%	£ 3.52	0.0%	0.47	£ 1.66	4%	2%
PRIVATE LABEL HOUSE 250 ML	29	82,817	0.1%	107,848	-0.9%	£ 0.77	1.0%	5.84	£ 4.48	2%	-31%
PRIVATE LABEL RICH BALSAMIC 235 ML	30	70,733	8.4%	32,044	13.2%	£ 2.21	-4.2%	4.26	£ 9.41	1%	-7%

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Source NielsenIQ w.e 25.01.25