

KANTAR **WORLD**PANEL



Federation of Bakers Bakery Market Overview

Data Ending 30th December 2018

Kantar Worldpanel

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The Bread and Morning Goods market is worth £3.88bn and grows at +2.2%. However, it is experiencing small volume declines due to individual shoppers buying less often and in smaller quantities. Growth is instead driven through higher prices due to a shift towards the more premium tiers and more expensive sectors, with the higher priced 'Free From' also driving growth. As a highly traded commodity, inflation in wheat due to economic uncertainties and a poor harvest has also contributed to the price increase.

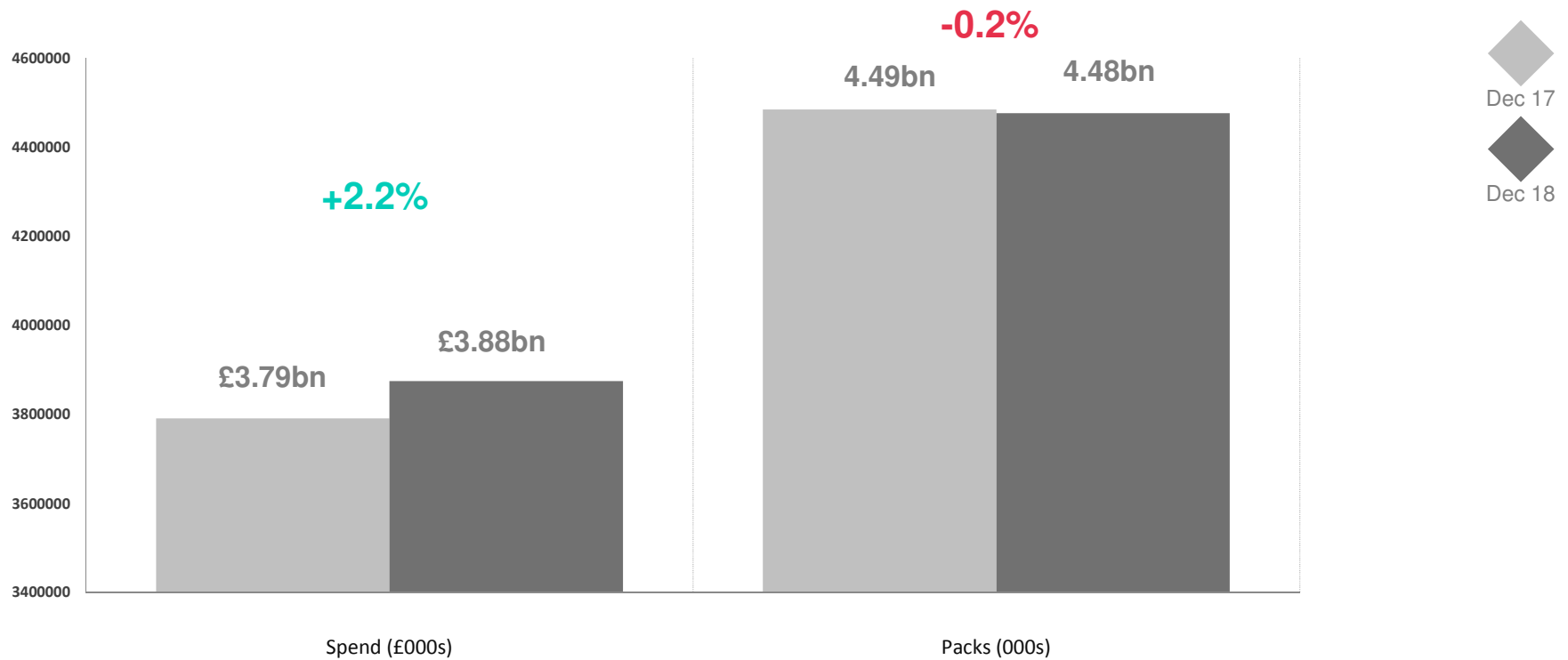
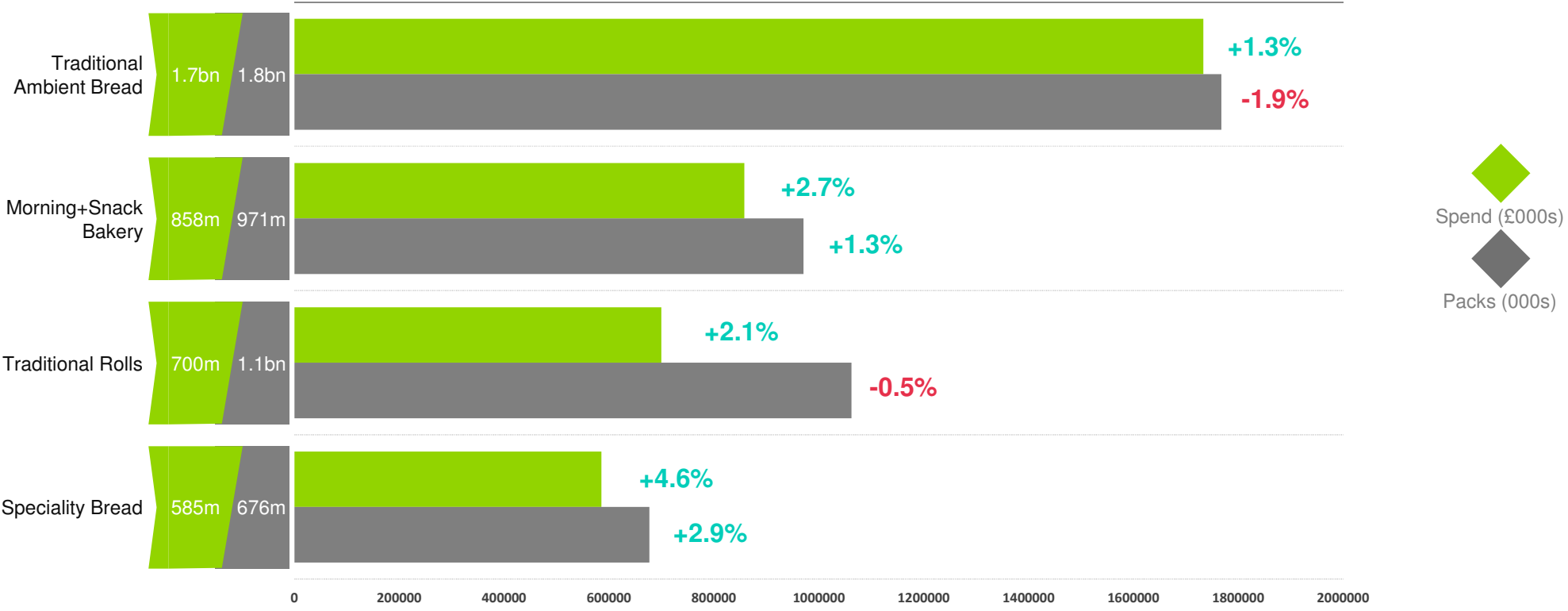
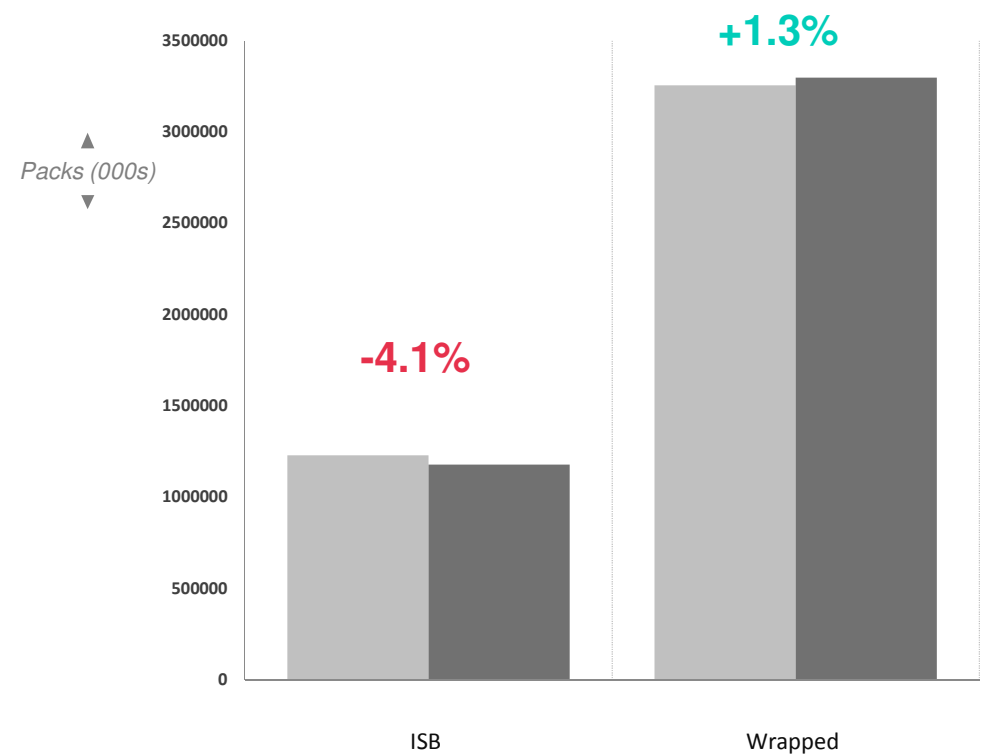
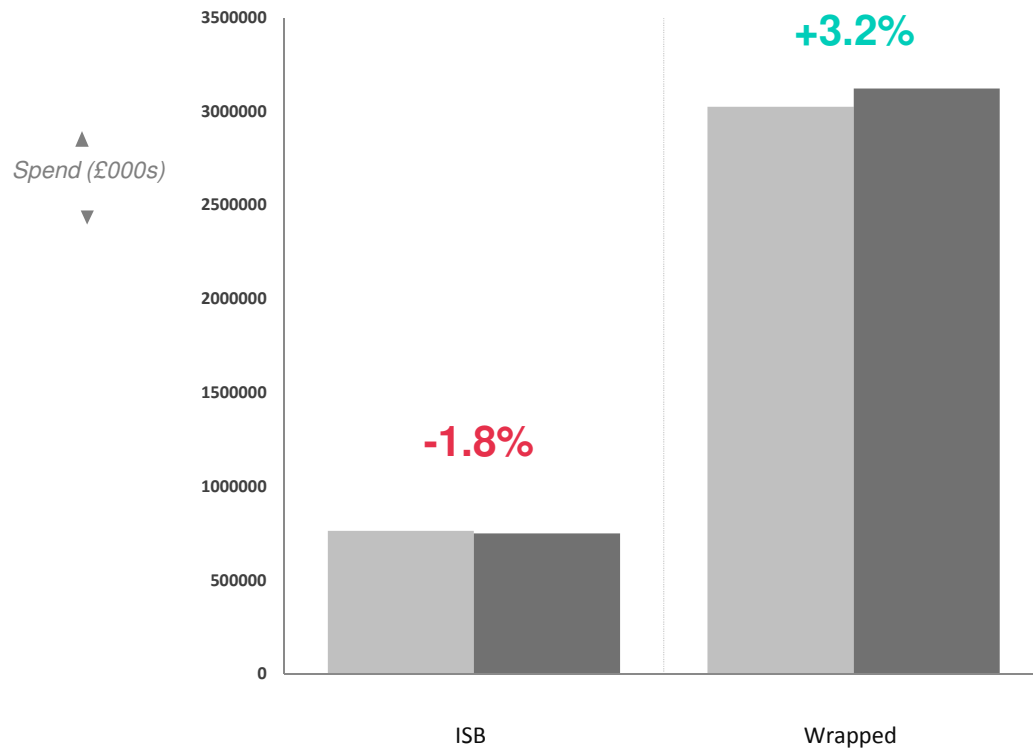


Chart Footnote

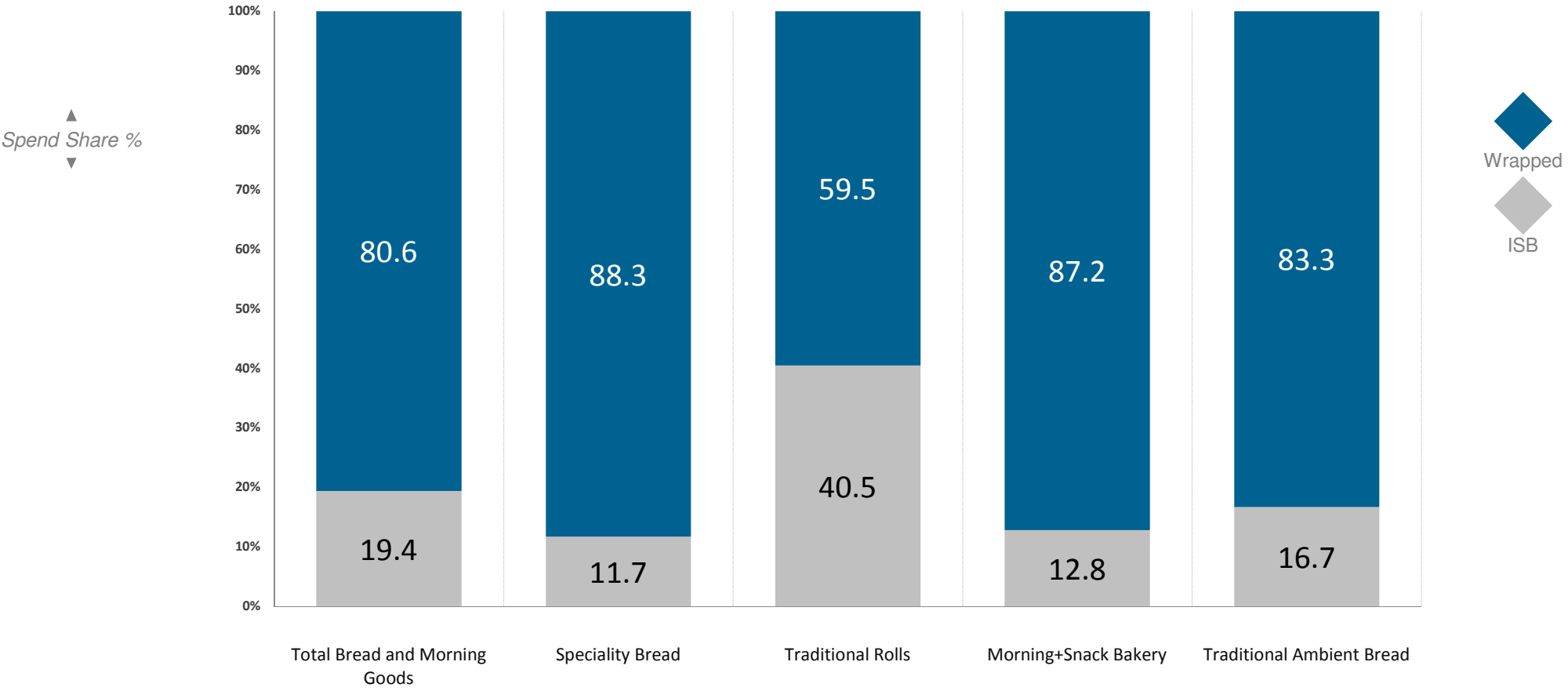
Growth is present across all the sectors, however, the largest sector, Traditional Ambient Bread grows the slowest due to volume declines of nearly -2%. Consumers are switching away from the Traditional Bread, towards more varied bakery in Speciality bread. Currently the smallest sector, Speciality Bread, grows the fastest in value and volume terms, particularly driven through Ciabatta.



Wrapped bakery makes up 80% of the market and continues to grow through value and volume. Consequently, wrapped steals spend and share from ISB, which has been in long term decline. While Traditional Ambient Bread declines at Total Market, it is the only sector to grow in ISB.



Traditional Rolls see the largest proportion of spend coming through ISB with 40.5% share, although this is down from 42.7% last year, due to a -3.1% decline. Speciality Bread and Morning Snack see the smallest % of sales through ISB, and both decline at a faster than the market.



Thank you

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