

KANTAR



Federation of Bakers Bakery Market Overview

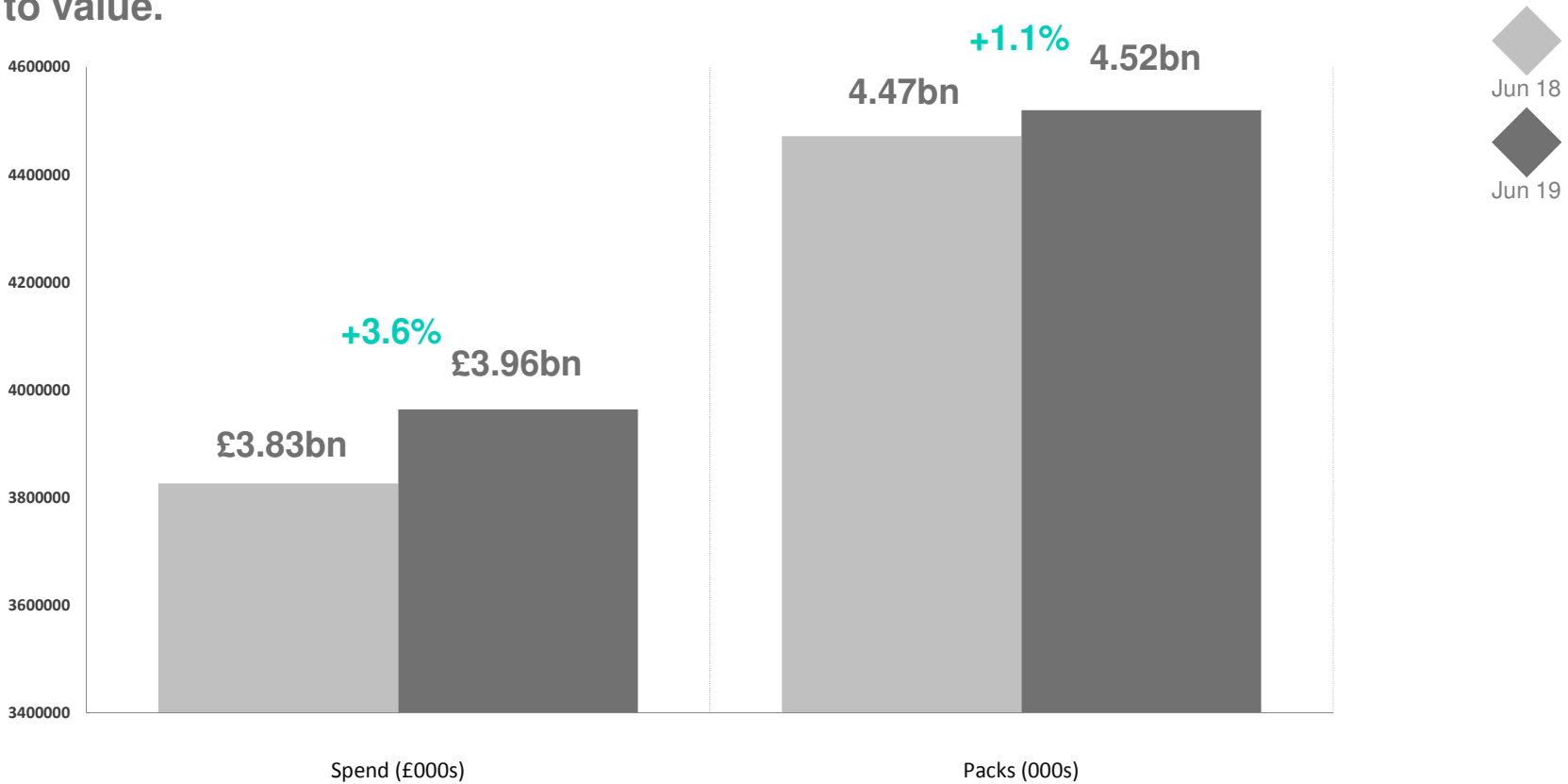
Data Ending 16th June 2019

Kantar – Worldpanel Division

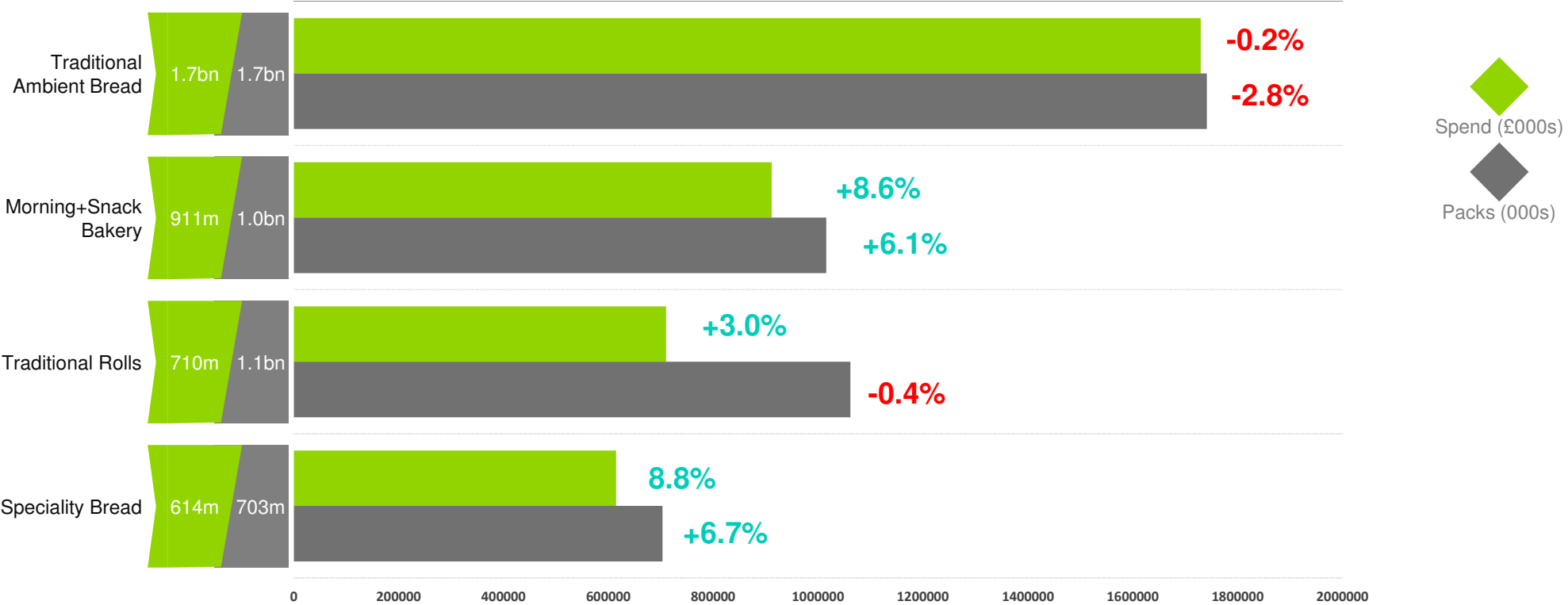
Flora Zwolinski

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Federation of Bakers Ltd

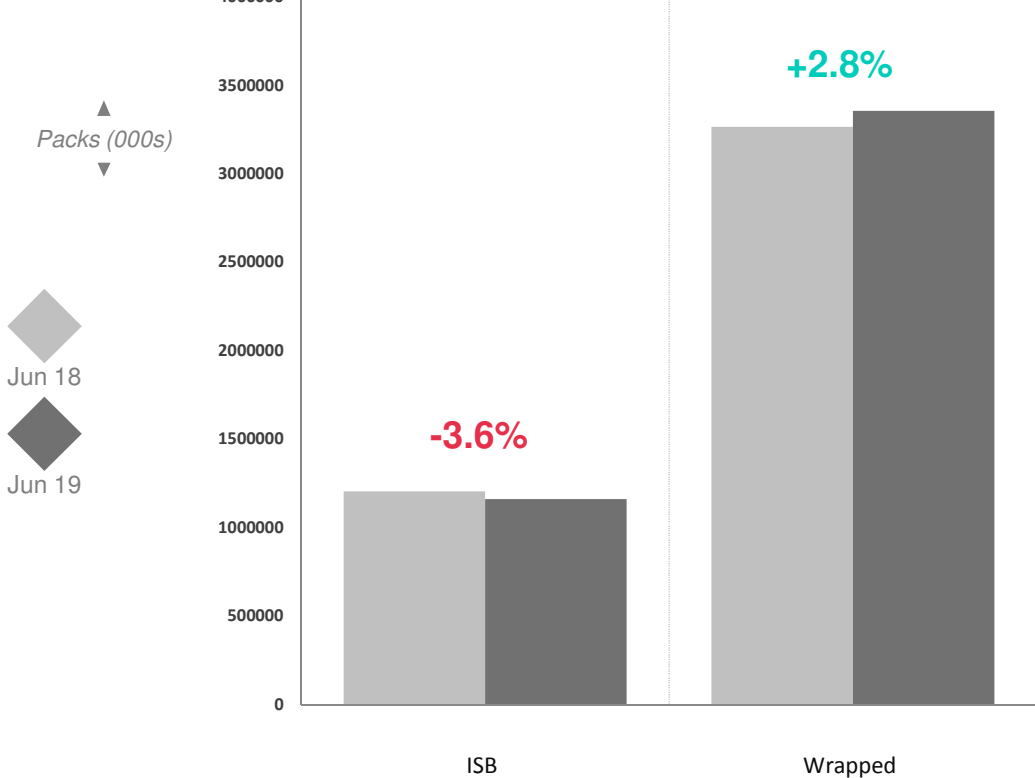
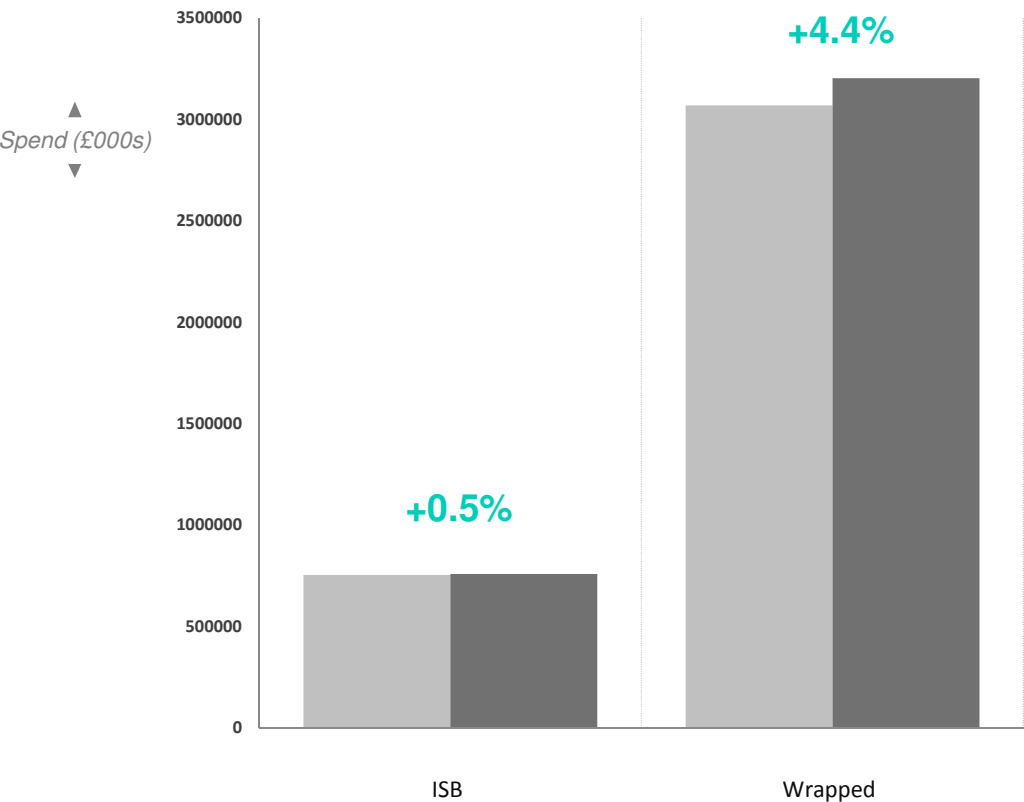
The Bread and Morning Goods market has performed well in the past year, growing at +3.6%, totalling its value to just under £4bn. Individual buying habits have not changed, instead, growth is mostly driven from higher prices. While we have seen a +1% increase in buyers, this is entirely driven by population growth, with penetration nearly at 100%. This alone drives the volume growth, which consequently grows at a slower rate to value.



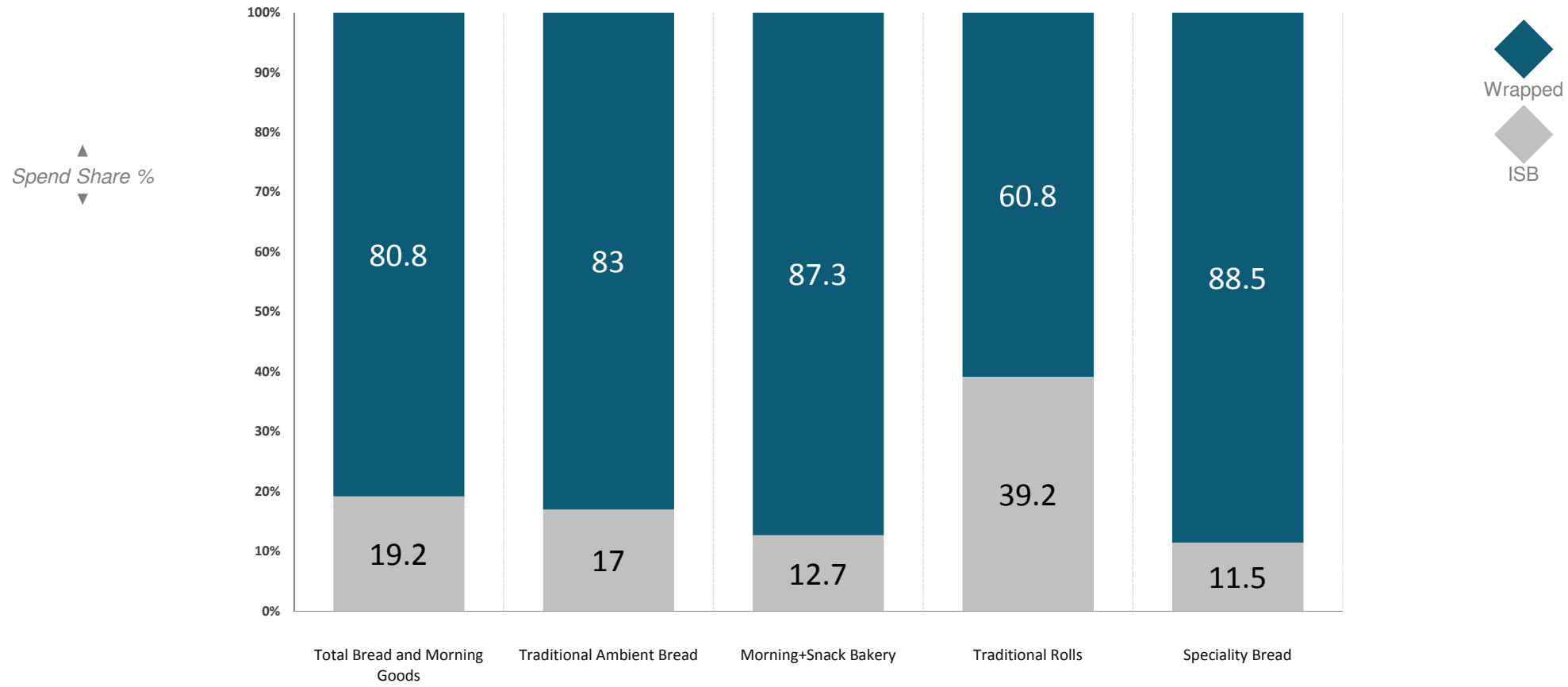
Traditional Ambient Bread remains the largest sector in Bread and Morning Goods although it is the only one to see value decline (-0.2%). This sector experiences more severe volume declines, with Rolls the only other sector to see any volume decline. While still the smallest sector, Speciality Bread is the star performer with Morning + Snack Bakery growing just behind as consumers continue to look for more variety in their bakery diet.



While ISB's growth is moderate, this is the first time growth has been posted in the last few years. A +4.2% increase in prices drive this, with volume continuing to decline due to penetration losses and individual buyers buying less. Total Market growth is instead driven by Wrapped, which benefits from individual buyers buying more at higher prices.



ISB makes up 19.2% of the market, one of the lowest shares it has had in five years. The only sector where ISB overtrades is Traditional Rolls, where it comprises over 39% of the market. Speciality Bread has the lowest share of ISB, followed by Morning + Snack Bakery, the two sectors which grow the fastest.



Thank you

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