

Home Baking - UK - July 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“As consumer spending rises, it is likely to become increasingly important for home baking companies to remind people of the benefits of baking in order to maintain consumer interest. Brands can leverage the relaxation associated with baking in their advertising campaigns, which is likely to resonate given that stress affects many people’s lives.”

– Emma Clifford, Senior Food Analyst

This report looks at the following areas:

- It will become increasingly important for companies to keep baking front of mind for consumers as the economy rebounds
- Companies which support health-conscious bakers are likely to reap rewards
- Targeted marketing campaigns can help to enhance the appeal of home baking among the older generation

The home baking bubble has finally burst after several years of impressive growth kick-started by the recession. Value growth slowed year on year in 2013 (driven solely by inflation), and is expected to go into decline in 2014. This downturn is supported by Mintel's consumer data which indicate that the proportion of Britons who bake has fallen between June 2013 and March 2014.

That this fall happened as a significant rise in consumer confidence was evident, against a backdrop of economic recovery, is unlikely to be complete coincidence. People tend to bake for enjoyment rather than as a means of saving money. However, baking faces growing competition from out-of-home leisure activities as people start to spend more freely and release pent-up demand for going out and having fun.

Arguably it is health concerns that have had the biggest impact on consumer demand. These have been heightened by the great deal of negative press attention sugar has received in the last year, this a main ingredient in many baked goods.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

APAC
+61 (0) 2 8284 8100

EMAIL:
oxygen@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Home Baking - UK - July 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Introduction

Definition
Excluded
Abbreviations

Executive Summary

The market

Figure 1: Forecast of UK retail value sales of the home baking market, 2009-19

Market factors

Health concerns heightened by the high-profile sugar debate
An improvement in consumer spending and confidence
Demographic changes present challenges and opportunities
Companies, brands and innovation

Own-label has a strong position in home baking ingredients

Own-label stole the lead in NPD in 2013

A drop in adspend in 2013

The consumer

Britain remains a nation of bakers...but its popularity has fallen in the last year

Figure 2: Frequency of baking at home, March 2014

Baking has strong associations with relaxation

Figure 3: How consumers feel when baking, March 2014

Special offers hold a lot of sway

Figure 4: Choice factors for baking mixes, cake coverings or decorations, March 2014

Baking is seen as an important life skill

Figure 5: Attitudes towards home baking, March 2014

Strong demand for resealable packaging

Figure 6: Further attitudes towards home baking, March 2014

What we think

Trend Application

Trend: Slow It All Down

Trend: Retired for Hire

Trend: Hungry Planet

Issues and Insights

It will become increasingly important for companies to keep baking front of mind for consumers as the economy rebounds

The facts

The implications

Companies which support health-conscious bakers are likely to reap rewards

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: oxygen@mintel.com

Home Baking - UK - July 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The facts

The implications

Targeted marketing campaigns can help to enhance the appeal of home baking among the older generation

The facts

The implications

Market Drivers

Key points

Most Britons are keen to lose weight

The high-profile sugar debate threatens demand for baking

Potential for alternative sweeteners and savoury items

Consumer spending gathers momentum...

Figure 7: Consumer expenditure and savings, at current prices, 2009-19

...with home baking threatened by less frugal mindsets

The ageing population presents a challenge

Shift towards smaller households hinders the market

Strengths and Weaknesses

Strengths

Weaknesses

Who's Innovating?

Key points

Own-label takes command of home baking NPD

2013 was the turn of Sainsbury's and Waitrose to up the ante

Figure 8: New product activity in home baking ingredients, own-label vs branded, 2009-14

Figure 9: Top 10 companies, by share of launches in UK home baking market, 2009-14

Dr Oetker leads the brands

Yellow fats look to NPD to target bakers

Vegetarian is the most common claim

Figure 10: Top 10 product claims in new launches in the home baking market, 2009-14

A jump in Halloween launches in the home baking market in 2013

Limited products with convenient packaging

Market Size and Forecast

Key points

The home baking 'bubble' has burst

Figure 11: UK retail value sales of the home baking market, 2009-19

The future

Figure 12: UK retail value sales of the home baking market, 2009-19

Factors used in the forecast

Segment Performance

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Home Baking - UK - July 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Key points

Eggs take the lion's share of sales

Figure 13: Share of UK retail sales in the home baking market, by segment, 2014 (est)

Figure 14: UK retail value sales in the home baking market, by segment, 2009-19

Challenging times for the sugar market

Flour and baking mixes fall from favour

Figure 15: UK retail value sales in the baking mixes, pastry and suet segment, by sub-segment, 2011-14

Cake coverings and culinary aids are the only segment to defy the downturn

Figure 16: UK retail value sales in the cake decorating, cake coverings, culinary aids and cooking chocolate segment, by sub-segment, 2011-14

Market Share

Key points

Whitworths is the rising star in sugar

Figure 17: Brand shares in UK retail sales of sugar, by value and volume, 2012/13 and 2013/14

A strong performance from Canderel

Figure 18: Brand shares in UK retail sales of artificial sweetener, by value and volume, 2012/13 and 2013/14

A decline in flour and baking mixes

Figure 19: Brand shares in UK retail sales of flour and dry baking mixes, by value and volume, 2012/13 and 2013/14

Big gains for own-label in cake coverings, decorations and culinary aids

Figure 20: Brand shares in UK retail sales of cake coverings, decorations and culinary aids, by value and volume, 2012/13 and 2013/14

Companies and Products

Dr Oetker

Background

Product range

Product innovation

Marketing and promotion

General Mills

Background

Product range

Product innovation

Marketing and promotion

Kerry Foods

Background

Product range

Product innovation

Marketing and promotion

Premier Foods

Background

Product range

The Silver Spoon Company

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Home Baking - UK - July 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Background
 Product range
 Product innovation
 Marketing and promotion
 Symington's
 Background
 Product range
 Product innovation

Brand Communication and Promotion

Key points

A drop in adspend in 2013

Figure 21: Topline advertising expenditure in the UK home baking market, by sub-segment, 2010-14

Dr Oetker took the lead in 2013

Figure 22: Main monitored media advertising expenditure on home baking*, by top 10 advertisers, 2010-14

Waitrose and Sainsbury's are the top-spending supermarkets

Sugar brands cut back

New TV ad campaign for Happy Eggs

General Mills stepped up advertising in 2013

The Consumer – Home Baking Habits

Key points

Britain is a nation of bakers...

Figure 23: Frequency of baking at home, March 2014

...but there has been a decline in baking since summer 2013

Figure 24: Frequency of baking at home, June 2013 and March 2014

Baking enjoys strong family appeal

Figure 25: Consumers baking partly from scratch and totally from scratch at least once a week, by gender and age, March 2014

Cakes are the go-to baking creations

Figure 26: Items baked at home in the last 12 months, March 2014

Generational divide in baking habits

Figure 27: Consumers who have baked batters, sweet puddings, sweet pies and tarts and savoury pies/tarts/pastries from scratch in the last 12 months, by age, March 2014

Figure 28: Consumers who have baked biscuits/cookies, brownies, muffins or pizza bases in the last 12 months, by age, March 2014

Bakers have a narrow repertoire

Figure 29: Repertoire of items baked totally and partly from scratch at home in the last 12 months, March 2014

The Consumer – Feelings Associated with Home Baking

Key points

Baking has strong associations with relaxation

Figure 30: How consumers feel when baking, March 2014

Under-35s are most adventurous

BUY THIS
 REPORT NOW

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
 EMAIL: oxygen@mintel.com

Home Baking - UK - July 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 31: Consumers who feel proud, adventurous, confident and economical when baking, by age, March 2014

The Consumer – Choice Factors for Baking Mixes, Cake Coverings or Decorations

Key analysis

Special offers hold a lot of sway

Figure 32: Choice factors for baking mixes, cake coverings or decorations, March 2014

Bakers opt for tried and tested products

Notable interest in high-quality ingredients

A sizeable minority look for better-for-you options

The Consumer – Attitudes Towards Home Baking

Key points

Baking is seen as an important life skill

Figure 33: Attitudes towards home baking, March 2014

Opportunities to help bakers develop their skills

Experimentation is popular

Interest in single-serve cake mixes from one in four bakers

The Consumer – Further Attitudes Towards Home Baking

Key points

Strong demand for resealable packaging

Figure 34: Further attitudes towards home baking, March 2014

The health agenda limits baking for one in three

Interest in better-for-you ingredients

Are natural sweeteners an answer to sugar concerns in baking?

Baking with vegetables and high-protein recipes sparks interest

Appendix – Market Size and Forecast

Figure 35: Best- and worst-case forecasts for UK value sales within the home baking, 2014-19

Appendix – Segment Performance

Figure 36: Best- and worst-case forecasts for UK value sales of eggs, 2014-19

Figure 37: Best- and worst-case forecasts for UK value sales of sugar and sweeteners, 2014-19

Figure 38: Best- and worst-case forecasts for UK value sales of flour, yeast, baking mixes, pastry and suet, 2014-19

Figure 39: Best- and worst-case forecasts for UK value sales of cake coverings, decorations, culinary aids and cooking chocolate, 2014-19

Appendix – The Consumer – Home Baking Habits

Figure 40: Frequency of baking at home, March 2014

Figure 41: Items baked at home in the last 12 months, March 2014

Figure 42: Repertoire of items baked totally from scratch at home in the last 12 months, March 2014

Figure 43: Repertoire of items baked partly from scratch at home in the last 12 months, March 2014

Figure 44: Frequency of baking at home – Bake partly from scratch (using ready-prepared pastry, cake mix or bread mix), by demographics, March 2014

Figure 45: Frequency of baking at home – Bake totally from scratch (using individual raw ingredients), by demographics, March 2014

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Home Baking - UK - July 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 46: Most popular items baked totally from scratch at home in the last 12 months, by demographics, March 2014

Figure 47: Next most popular items baked totally from scratch at home in the last 12 months, by demographics, March 2014

Figure 48: Most popular items baked partly from scratch at home in the last 12 months, by demographics, March 2014

Figure 49: Next most popular items baked partly from scratch at home in the last 12 months, by demographics, March 2014

Figure 50: Repertoire of items baked totally from scratch at home in the last 12 months, by demographics, March 2014

Figure 51: Repertoire of items baked partly from scratch at home in the last 12 months, by demographics, March 2014

Appendix – The Consumer – Feelings Associated with Home Baking

Figure 52: Feelings associated with home baking, March 2014

Figure 53: Most popular feelings associated with home baking, by demographics, March 2014

Figure 54: Next most popular feelings associated with home baking, by demographics, March 2014

Figure 55: Other feelings associated with home baking, by demographics, March 2014

Appendix – The Consumer – Choice Factors for Baking Mixes, Cake Coverings or Decorations

Figure 56: Choice factors for baking mixes, cake coverings or decorations, March 2014

Figure 57: Most popular choice factors for baking mixes, cake coverings or decorations, by demographics, March 2014

Figure 58: Next most popular choice factors for baking mixes, cake coverings or decorations, by demographics, March 2014

Appendix – The Consumer – Attitudes Towards Home Baking

Figure 59: Attitudes towards home baking, March 2014

Figure 60: Most popular attitudes towards home baking, by demographics, March 2014

Figure 61: Next most popular attitudes towards home baking, by demographics, March 2014

Figure 62: Other attitudes towards home baking, by demographics, March 2014

Appendix – The Consumer – Further Attitudes Towards Home Baking

Figure 63: Further attitudes towards home baking, March 2014

Figure 64: Most popular further attitudes towards home baking, by demographics, March 2014

Figure 65: Next most popular further attitudes towards home baking, by demographics, March 2014

Figure 66: Other further attitudes towards home baking, by demographics, March 2014

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com