Cake Decorations

Market Update

Data up to week ending 27.12.20

ESTD 1898
RENSHAW
THE PROFESSIONALS CHOICE

Rainbow Dust

Today’s Session

- Take Home Grocery
- Total Cake Decorations
- Icing
- Marzipan
- Frostings
- Colourings
- Edible Decorations
- Other Categories
- Conclusions

- **Take Home Grocery**
- Total Cake Decorations
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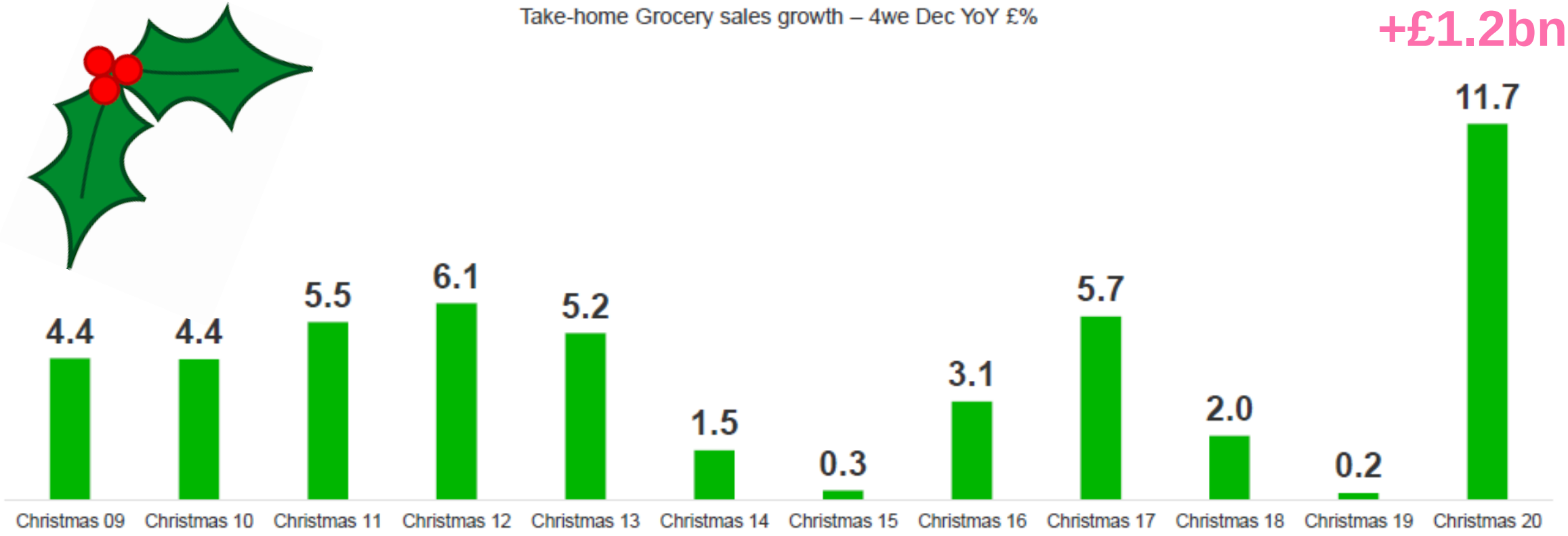
Strongest Christmas growth ever seen

£11.6bn
+£1.2bn



KANTAR

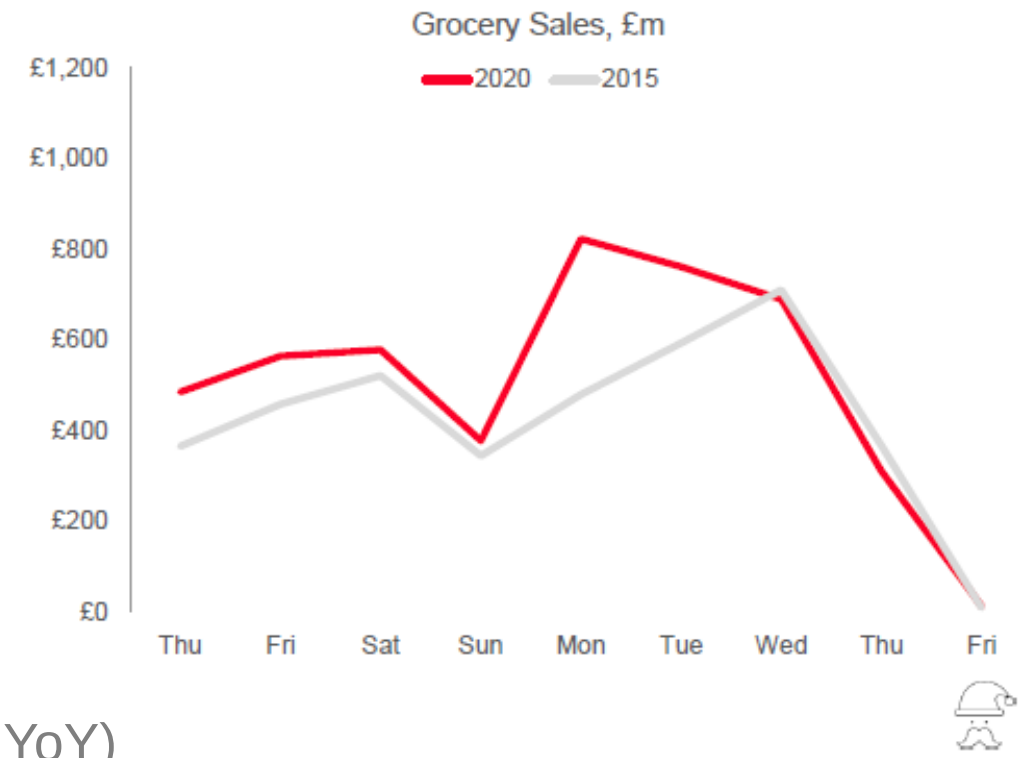
Kantar, FMCG panel, Grocery, 4we 27th December 2020

Some more Christmas headlines…

Record month for UK supermarkets as Covid brings dinner back home

£2.3bn

was spent on Groceries between Monday 21st and Wednesday 23rd December



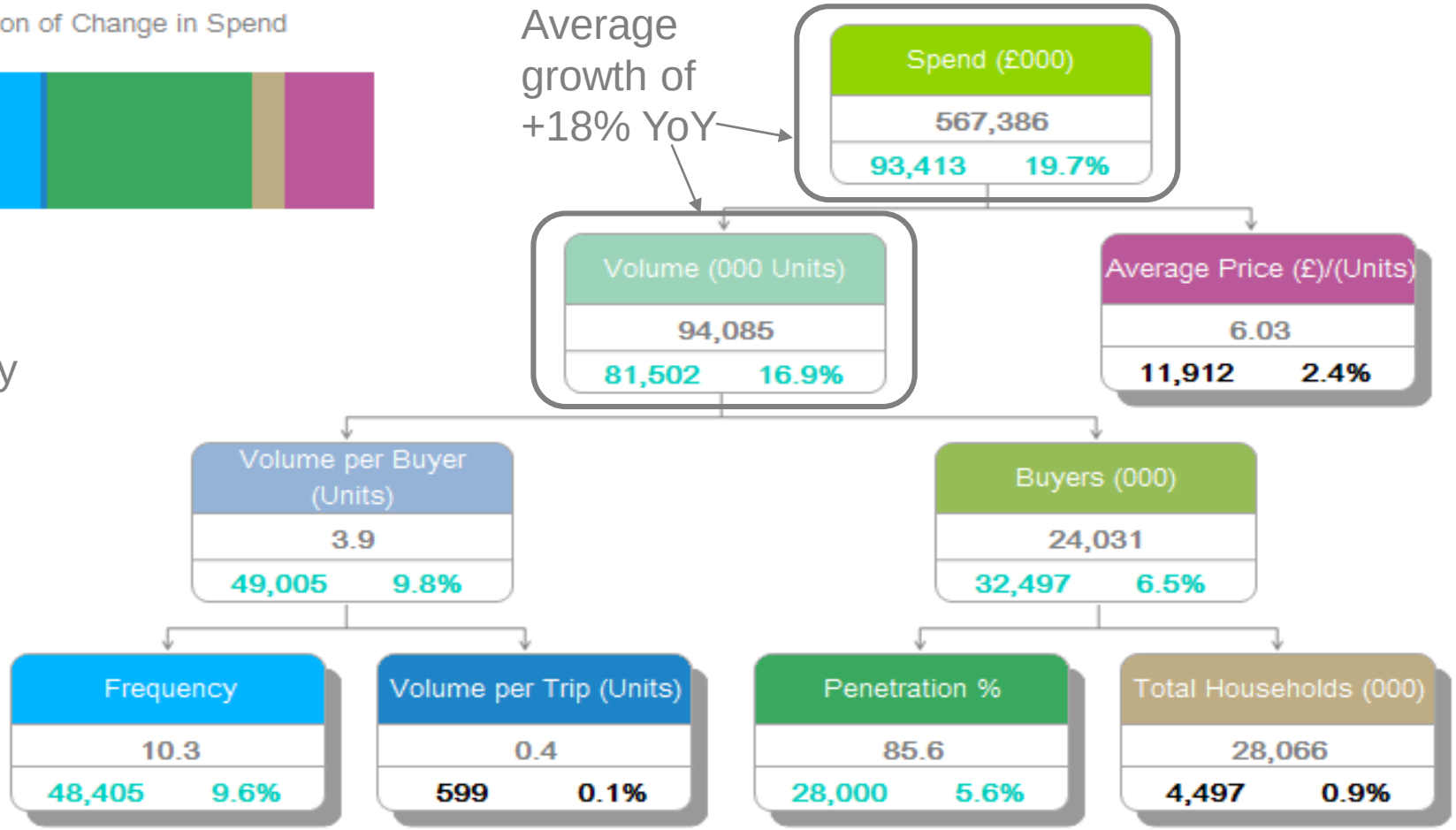
- Online Dec grocery spend: 12.6% (7.4% LY)
- Monthly record on premium own label: £584m (+£74m YoY)
- Ocado finished the year as it started – the UK's fastest growing retailer
- Tesco sales rose by 11% in Dec driven by success of *Tesco Finest*
- Chilled desserts +15% YoY

The home baking boom continues…

Attribution of Change in Spend

Driven by primarily by consumers shopping more frequently

Average growth of +18% YoY



KEY
= > 3% Change
= < -3% Change

27-Dec-20 vs. Previous Year

Home Baking | Total Retailers | 52 w/e | Previous Year

Whilst pre-packed cakes suffer…

TOP PRODUCTS

Cakes: Home baking trend costly for cakes

By Abbie Dawson, Daniel Woolfson | 18 December 2020

- Total volume change: -1.4%
- Own label: £20m decline
- Hardest hit brands: McVities, Thorntons & Mary Berry

This year's rank	Last year's rank	Brand	Manufacturer	£m	change (£m)	change (%)
1	1	Mr Kipling	Premier Foods	164.1	5.4	3.4
2	2	Cadbury	Premier Foods	78.9	2.1	2.8
3	4	Soreen	Samworth Brothers	40.9	2.9	7.8
4	3	McVitie's	Pladis	30.6	–9.4	–23.6
5	5	Thorntons	Finsbury Foods	18.4	–4.3	–18.9
6	6	Bonne Maman	Andros	11.5	0.3	3.0
7	10	Galaxy	Mars	10.0	3.8	61.0
8	7	Mrs Crimble's	Kallo Foods	9.1	–0.2	–1.7
9	9	Balconi Cakes	Balconi	8.5	1.6	23.0
10	8	Graze	Unilever	6.4	–0.7	–10.4

Top 20 Products: In Association with Nielsen (Grocer 18.12.20)

- Take Home Grocery
- **Total Cake Decorations**
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- Marzipan
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- Other Categories
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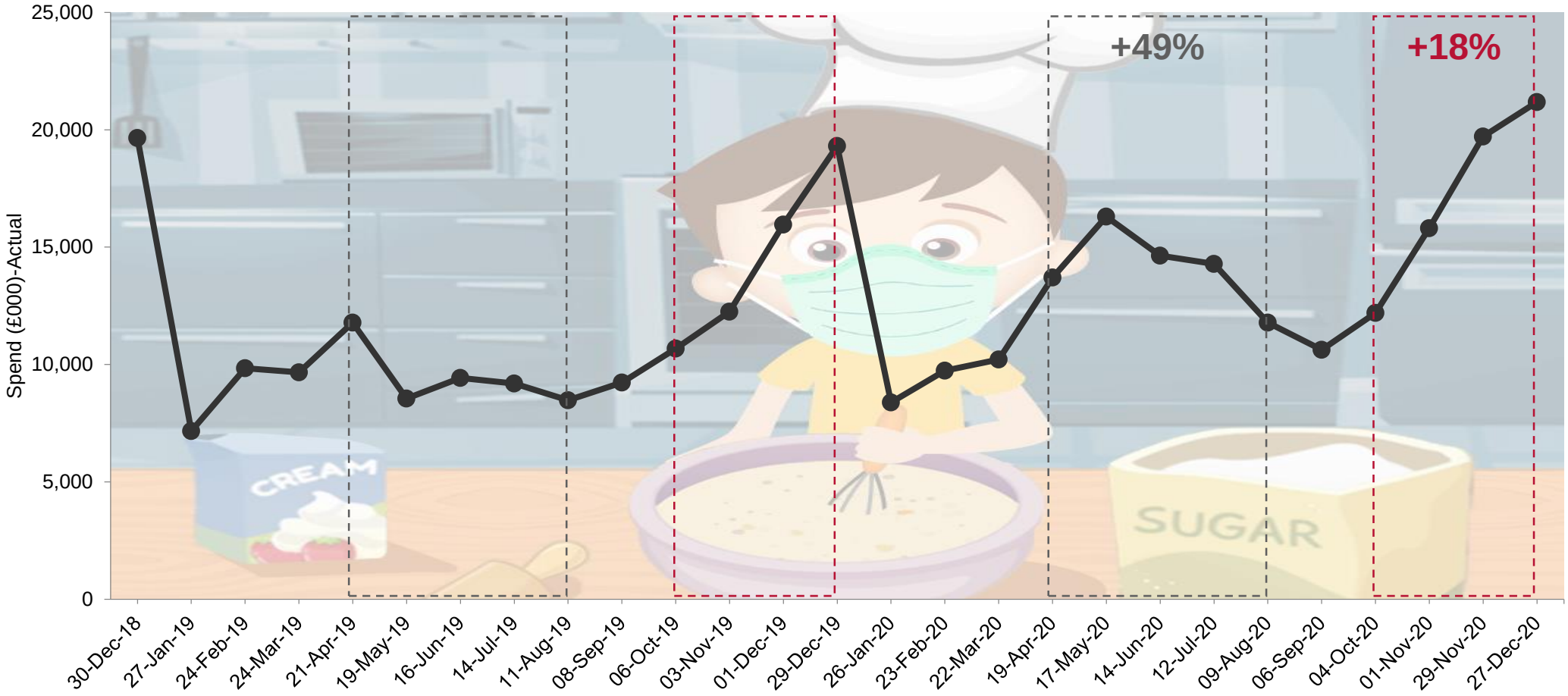
Growth continues at record level

LY	51.8% households	14.4m buyers	£142m 104m packs	4.1 trips per year
and now…	+17%	+18%	+27%	+11%
TY	60.8% households	18.4m buyers	£179m 133m packs	4.6 trips per year

52 w.e.29.12.19 vs 52 w.e.27.12.20 Total Cake Decorations KPI Report

Growth continues since our last review

Total Cake Decorations: Trended 4 week spend



Spend (£000) | Actual | Total Market | 4 w/e

Total Cake Decorations

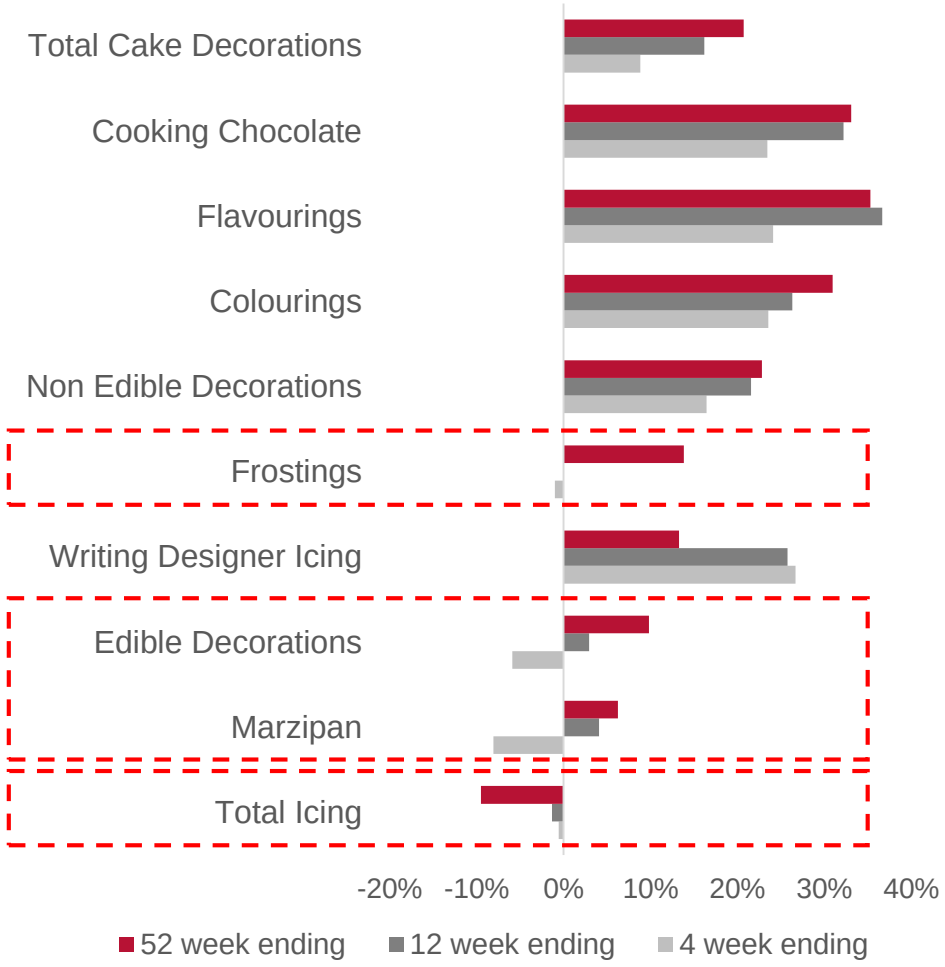
Taste & convenience continue to drive growth

Cooking Chocolate £43.7m 46.8m packs +33% YoY(ave.)		**Flavourings** £34.6m 20.3m packs +33% YoY(ave.)		**Frostings** £25.2m 12.2m packs +13% YoY(ave.)	
Edible Decorations £20.2m 16.1m packs +10% YoY(ave.)		**Icing** £18.2m 10.1m packs -10% YoY(ave.)		**Non Edible Decorations** £15.2m 13.3m packs +20% YoY(ave.)	
Marzipan £11.8m 6.3m packs +6% YoY(ave.)		**Colourings** £6.4m 6.1m packs +30% YoY(ave.)		**Writing Icing** £3.3m 1.8m packs +13% YoY(ave.)	

52 week ending 27.12.20

Most categories in double digit growth

YoY Growth: Value

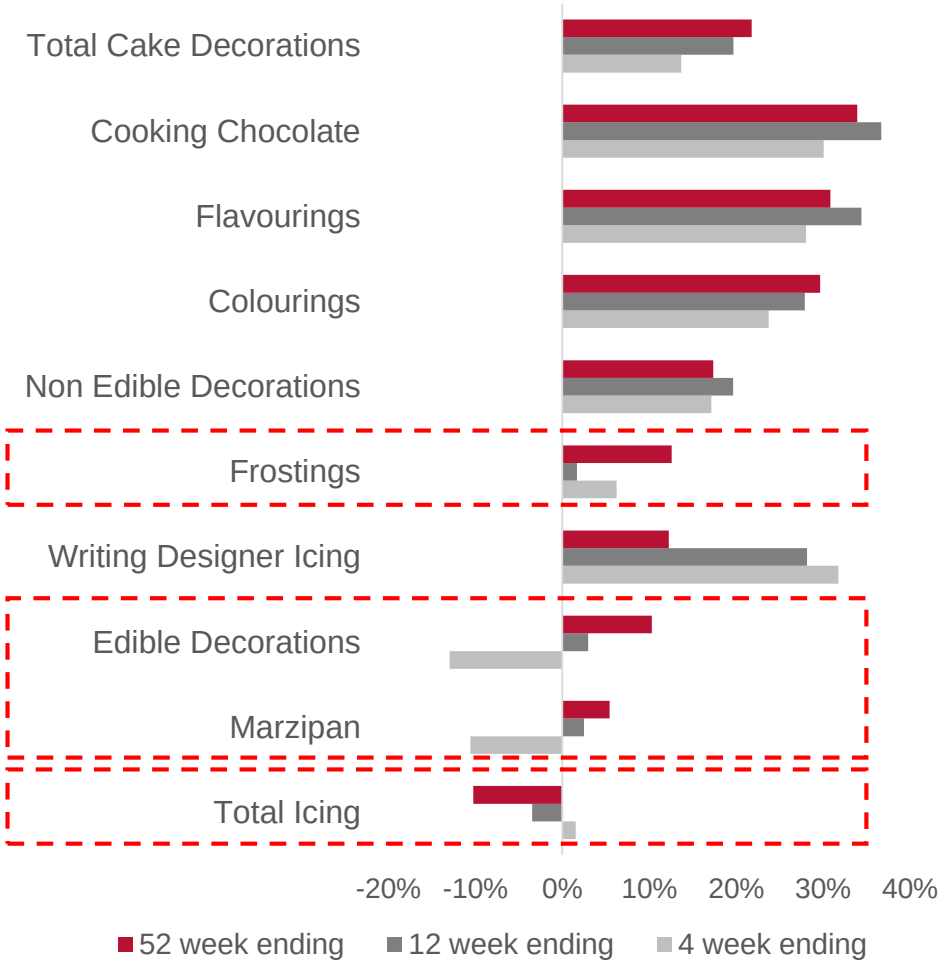


Icing has recorded some slight volume growth in the month of December

Marzipan & Edible Decorations have slipped into decline in December

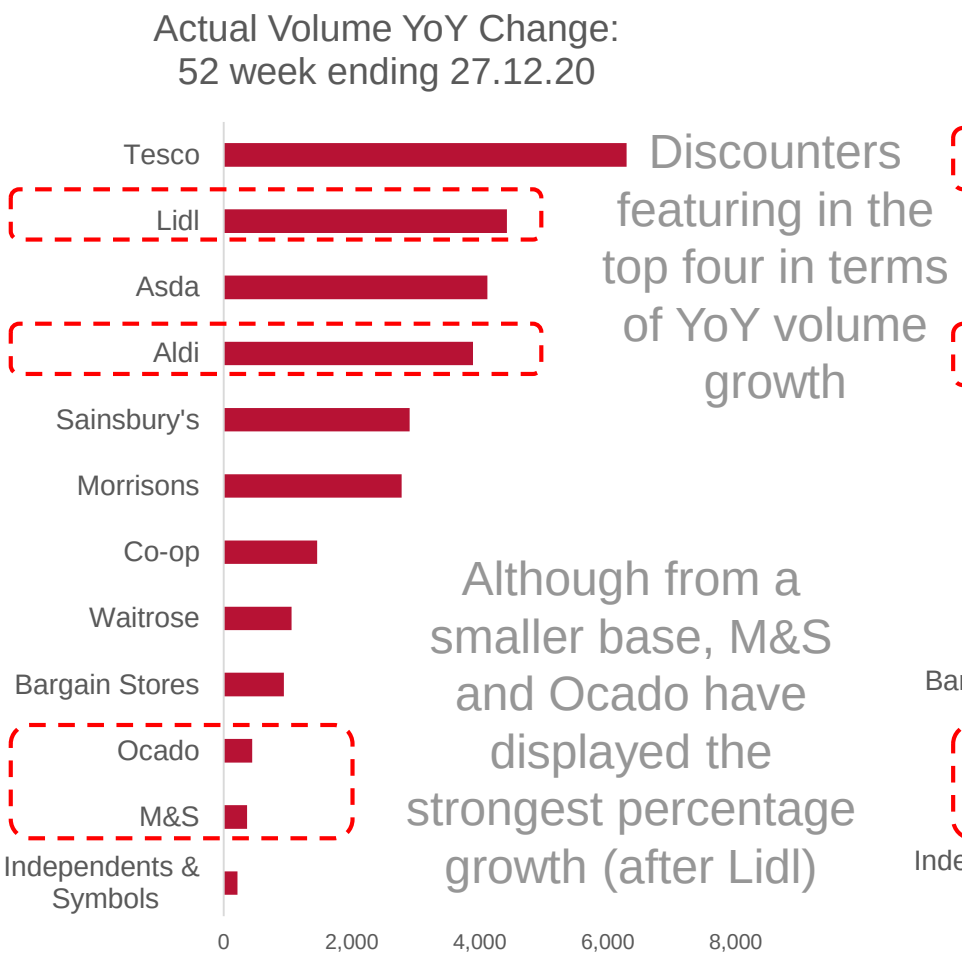
Frostings spend is behind last year in Q4 (calendar)

YoY Growth: Volume



Week ending 27.12.20

All retailers are growing YoY



Discounters featuring in the top four in terms of YoY volume growth

Although from a smaller base, M&S and Ocado have displayed the strongest percentage growth (after Lidl)

Shopping online for cake decorations has increased substantially

Online spend has doubled in the last year

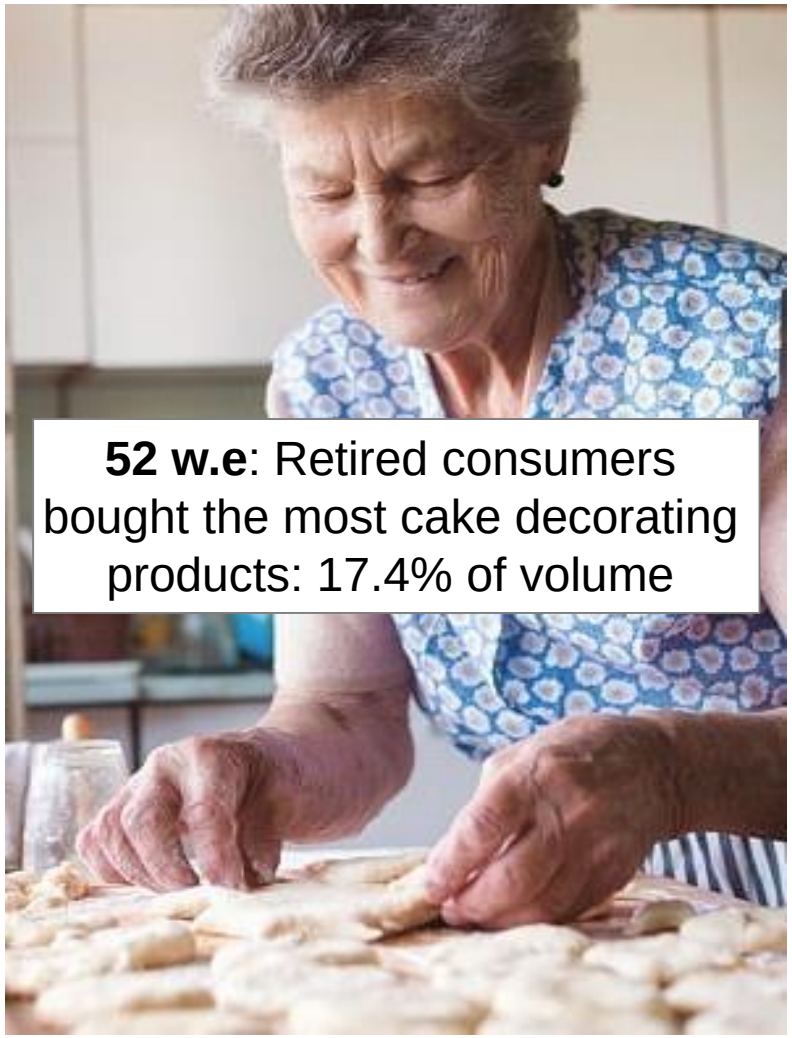
52 w.e quick facts:

- 12.3% value share
- 3.2m buyers
- 11.4% penetration
- Demographics with largest online spend:
  -shoppers aged 35-44
  -young families (0-4)

12 w.e. quick facts:

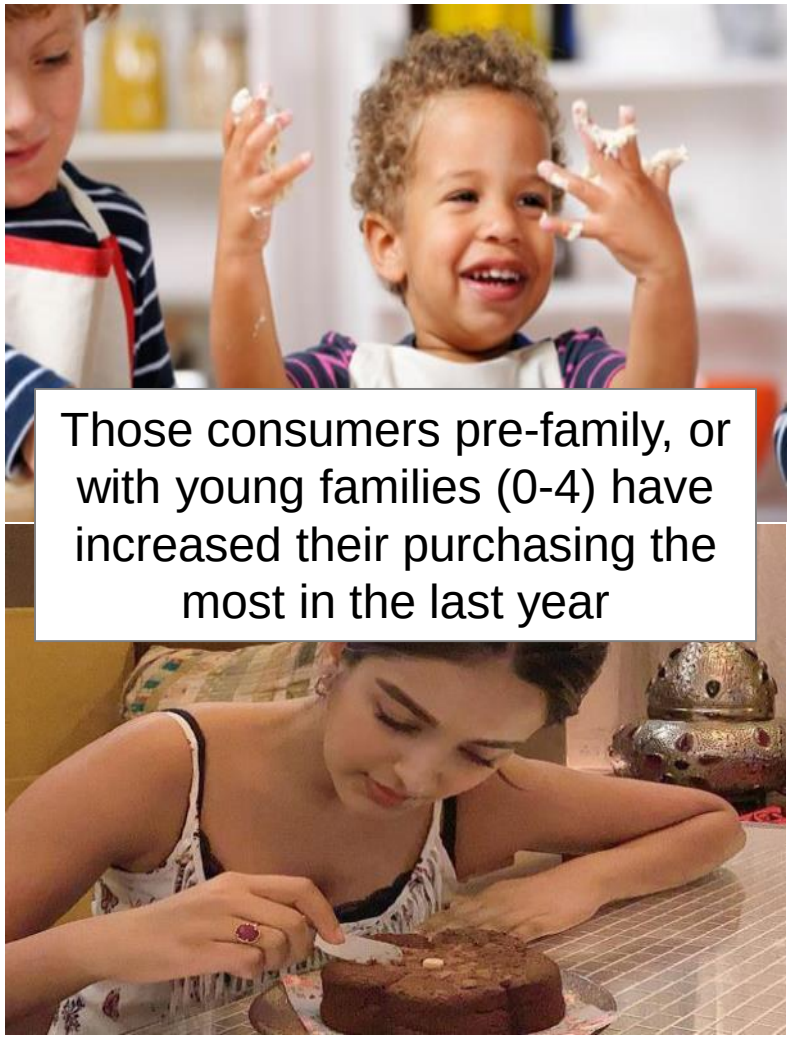
- +107% vol
- +108% val
- 13.8% value share

Older consumers have spent the most on cake decorations



52 w.e: Retired consumers bought the most cake decorating products: 17.4% of volume

12 w.e: Shoppers aged 65+ spent the most on cake decorations on the run up to Christmas (27% value)



Those consumers pre-family, or with young families (0-4) have increased their purchasing the most in the last year

- To view the latest Kantar data results in full, please get in touch:

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