



Category Insight – Cooking Sauces



COOKING SAUCES, KITS & ACCOMPS...

COOKING SAUCES CATEGORY IS WORTH OVER £1.3BN AND IS IN +2.2% GROWTH YOY!



Indian remains the **#1** cuisine, driven through high frequency however Oriental has seen the largest growth in the market.

30% of consumers want intense flavours

Consumers want to cook more from scratch, but need guidance or want quick time fixes

Ambient pasta sauces accounts for **34%** of the Cooking sauces category.

25% of people use ambient cooking sauces at least once a week

66% of people say new products in the cooking sauce aisle often catch their attention

PREMIER FOODS ARE **#1** SUPPLIER IN COOKING SAUCES, WITH 53% PENETRATION.

Homepride®



#1 Pasta Bake Brand



Leading Italian Sauce Brand. Over £56M



#1 Indian Brand in SYMBOLS AND INDEPENDENTS



#1 in Indian KITS - Over £17M

Sharwood's Quality Campaign 2024

NO.1*
TIKKA MASALA
BRAND IN THE UK

**DOUBLE
CREAM**
AUTHENTIC
SPICE BLEND



**SHARWOOD'S
GREAT
TASTE**

QUALITY YOU CAN TRUST SINCE 1889

*Source: Circana All Outlets UK, Cooking Sauces & Accomps (Category defined by Premier Foods), Indian Sauces Standard, Sub-brand value and unit sales for 52 wks 22nd June 2024

NO.1*
MANGO CHUTNEY
BRAND IN THE UK

**INDIAN
MANGOES**
SIGNATURE
SPICE BLEND

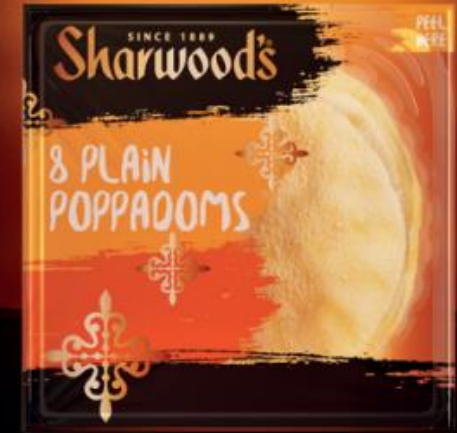


**SHARWOOD'S
GREAT
TASTE**

QUALITY YOU CAN TRUST SINCE 1889

*Source: Circana All Outlets UK, Cooking Sauces & Accomps (Category defined by Premier Foods), Indian Accompaniments Chutneys, Sub-brand value and unit sales for 52 wks 22nd June 2024

NO.1*
POPPADOM
BRAND IN THE UK



**HAND ROLLED
IN INDIA** | **SUN-DRIED
IN INDIA** | **SHARWOOD'S
GREAT TASTE**

QUALITY YOU CAN TRUST SINCE 1889

*Source: Circana All Outlets UK, Cooking Sauces & Accomps (Category defined by Premier Foods), Indian Sauces Standard, Sub-brand value and unit sales for 52 wks 22nd June 2024

The No1 Dry Noodle Brand



**NO.1 Medium Egg Noodle in Market
based on UROS & VROS**



**NO.1 Fine Egg Noodle in Market based
on UROS & VROS**

Pasta Bakes are Homepride's heartland, and it's a huge subsector within Italian

3rd most Popular Italian Dish

1

Bolognese



2

Lasagne



3

Pasta Bake



4

Mac N Cheese



5

Carbonara



185 Million Occasions Every Year

185 million occasions in L52W
+ 13% vs YA

Pasta Bakes has the largest % of consumers using a cooking sauce to make the dish vs other Italian pasta dishes

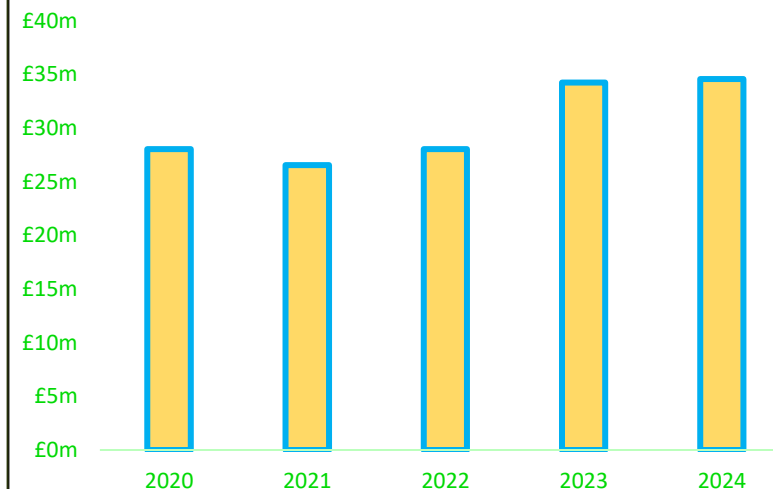
	Scratch	Assisted	Convenience
Bolognese	44%	44%	11%
Lasagne	19%	34%	47%
Pasta Bake	22%	58%	20%
Mac N Cheese	41%	11%	20%
Carbonara	37%	39%	23%

KWP: CSKA, Individual meal occasions (millions), 52 w/e 17 Mar 24

Worth £34m RSV

Pasta Bake subsegment has grown +23% since 2020 in RSV

Total Pasta Bakes Value Sales



Circana, Total Pasta Bake (exc Lasagne) Value Sales, 52 w/e 14 Sept 24

Homepride has a range of Pasta Bakes that offer versatile convenient meals.



Branded Market Leader

No.1 Pasta Bake Brand in the UK

Quality & Taste

High quality ingredients, recipes consumers love!

Convenient & Versatile

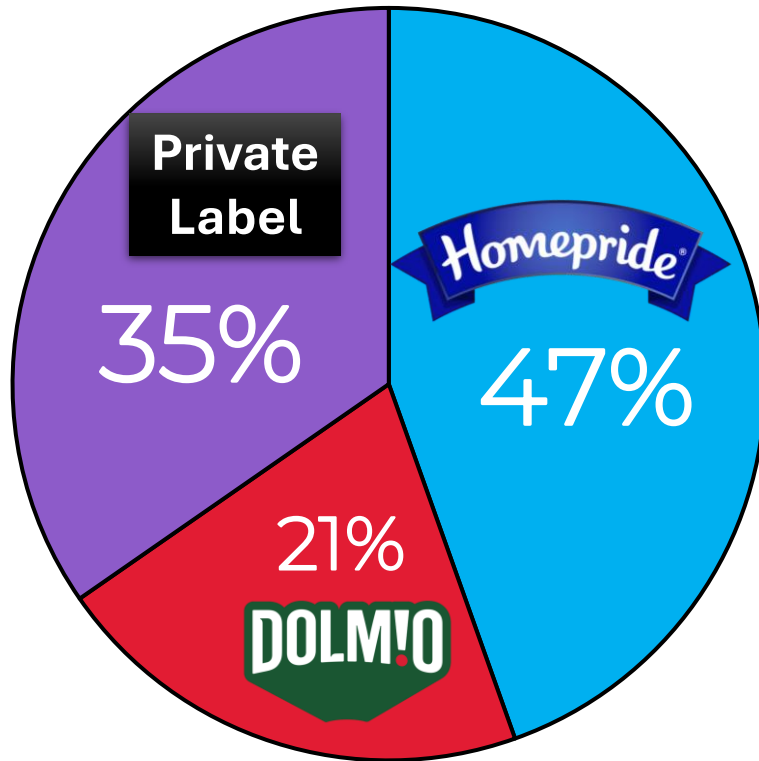
Perfect for hiding veggies!

.... And, Homepride are the No.1 Pasta Bake Brand



Homepride have a huge 47% market share

Pasta Bake Market Share



Circana, Homepride, Dolmio, Private Label, Value Share, 52 w/e 14 Sept 24

And we updated our packs to communicate this to consumers



No.1
Pasta Bake
Range in the UK

Old

New



**LOYD
GROSSMAN**

Is a leading brand in Italian Cuisine



£56.5m

brand

+5.1%

**CAGR last 5
Years**

65%

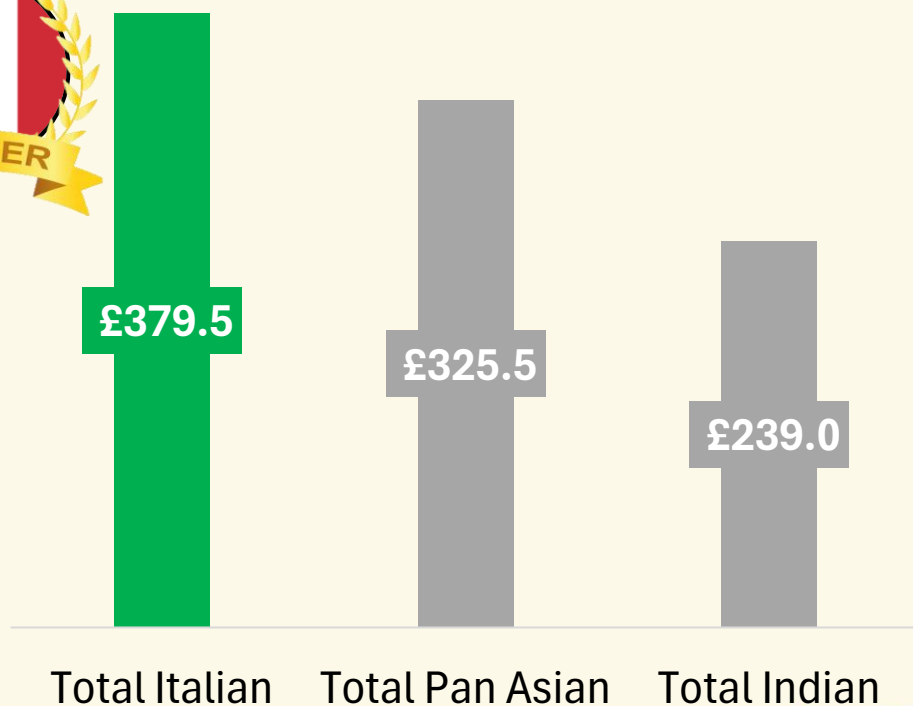
Awareness

3.6m

loyal shoppers

ITALIAN IS THE MOST POPULAR CUISINE IN THE UK

Cooking sauces RSV by cuisine



852M ITALIAN COOKING SAUCES OCCASIONS



72% PENETRATION FOR ITALIAN COOKING SAUCES

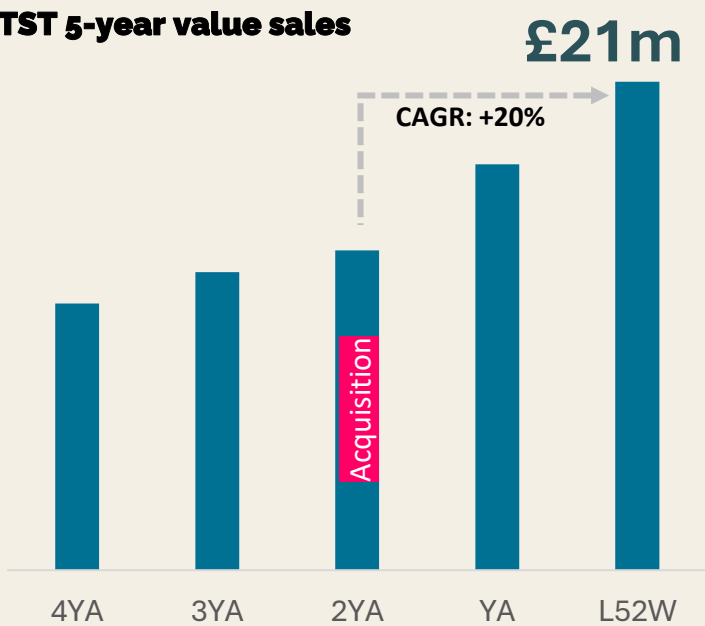


MORE THAN 12,000 ITALIAN RESTAURANTS IN THE UK

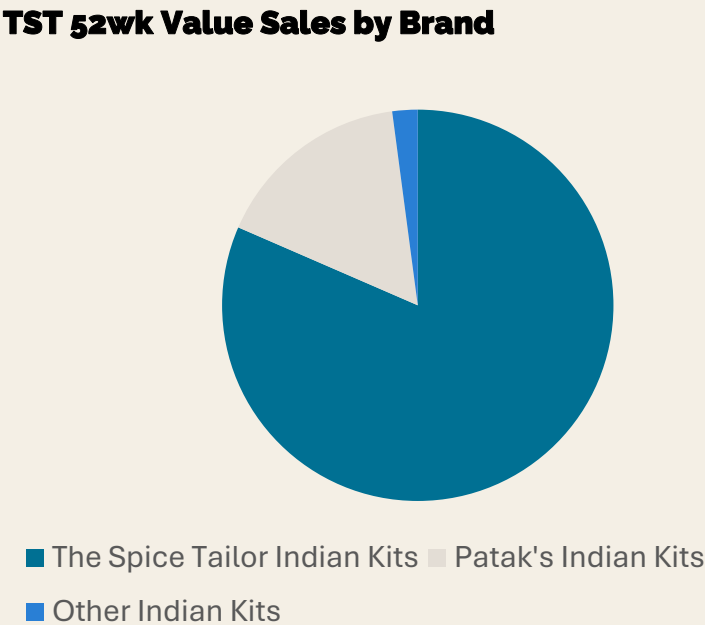
The Spice Tailor is a strong performing brand in the UK



The Spice Tailor has been delivering solid growth, +45% since the acquisition and is the biggest Indian kit brand and it also over indexes with affluent shoppers



Source: Circana 5yr Value Sales 52 w/e 9th Nov'24



Source: Circana Value Sales 52 w/e 9th Nov'24



Source: Kantar WPO 52 w/e 3rd Nov '24

Leverage portfolio strength in Indian:

by filling key flavour gaps whilst adding excitement with regional flavours



Filling key flavour gaps

Top market flavour values



Flavour	52wk RSV
Tikka Masala	£29,228,515
Korma	£17,731,343
Butter Chicken	£11,766,350
Balti	£6,886,562
Jalfrezi	£5,534,078
Madras	£5,107,001
Rogan Josh	£3,816,080
Keralan	£3,368,933
Goan	£2,932,765
Bhuna	£2,110,873
Makhani	£1,411,366
Vindaloo	£459,676

Source: Circana 52w/k Flavour Grouping RSV w/e 31st Aug'24

Exciting regional flavours

Indian flavour map



CSKA – Minimum credible range

BRAND	PRODUCT DESCRIPTION	4 Shelf	3 Shelf	2 Shelf	1 Shelf
Loyd Grossman	Loyd Grossman Tomato & Basil Sauce 350g	Y	Y	Y	Y
Dolmio	Dolmio Bolognese Original Sauce 500g	Y	Y	Y	Y
Sharwood's	Sharwood's Tikka Masala Cooking Sauce Mild 420g	Y	Y	Y	Y
Sharwood's	Sharwood's Poppadum's Plain 8 pack	Y	Y	Y	Y
Sharwood's	Sharwood's Medium Egg Noodles 340g	Y	Y	Y	Y
Ben's	Ben's Cooking Sauce Sweet & Sour 450g	Y	Y	Y	Y
Sharwood's	Sharwood's Cooking Sauce Korma 420g	Y	Y	Y	
Amoy	Amoy Dark Soy Sauce 150ml	Y	Y	Y	
Sharwood's	Sharwood's Prawn Crackers 60g	Y	Y	Y	
Blue Dragon	Blue Dragon Coconut Milk 400ml	Y	Y	Y	
Sacla	Sacla Classic Basil Pesto 190g	Y	Y	Y	
Dolmio	Dolmio Lasagne Creamy Sauce 470G	Y	Y	Y	
Dolmio	Dolmio Bolognese Smooth Sauce 500g	Y	Y		
Loyd Grossman	LG Tomato & Chilli Sauce 350g	Y	Y		
Sharwood's	Sharwood's Mango Chutney 360g	Y	Y		
Sharwood's	Sharwood's Mini Naan Bread Garlic & Coriander 4 pack	Y	Y		
Patak's	Patak's Curry Paste Tikka Masala 283gg	Y	Y		
Blue Dragon	Blue Dragon Sweet Chilli Dipping Sauce 190ml	Y	Y		
Blue Dragon	Blue Dragon Svt Chilli&Garlic StirFry Sce 120g	Y	Y		
Amoy	Amoy Light Soy Sauce 150ml	Y			
Homepride	Homepride Chilli Sauce Jar 485g	Y			
Blue Dragon	Blue Dragon Chow Mein SF Sauce 120g	Y			
Kingfisher	Kingfisher Water Chestnuts Sliced in Water 225g	Y			
Blue Dragon	Blue Dragon Thai Green Curry Paste Hot 285g	Y			
Homepride	Homepride Pasta Bake Creamy Tomato & Herb 500g	Y			
The Spice Tailor	The Spice Tailor Keralan Coconut Curry Mild 300g	Y			
Sharwood's	Sharwood's Balti Cooking Sauce 420g	Y			



Chinese New Year...

 Cooking sauce purchases at Chinese New Year 2024 were up +10% vs YA



- The main categories that shoppers bought into were
- Dry Rice & Noodles 49% **+12%** YOY
 - Cooking Sauces & Meal kits 47% **+10%** YOY

Top brands picked by shoppers


62% -


50%


35%

Chinese New Year is the 29th January 2025
- The year of the snake - are you stocking the best selling Chinese SKU's?

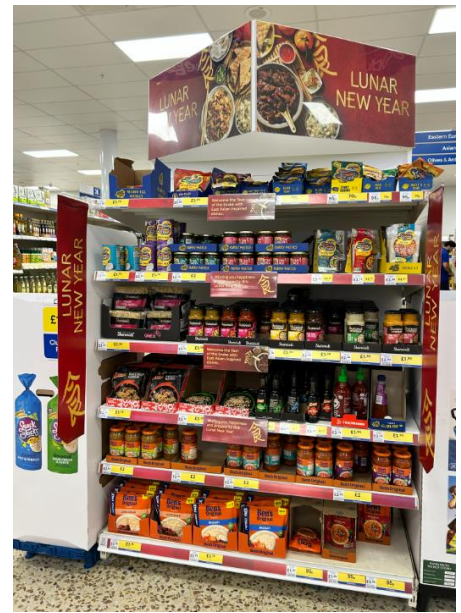
Chinese accomps were up +10.4% in the market in the 4 weeks up to CNY (2024 vs 2023)



29% of shoppers may be able to be influenced to celebrate as they said they just 'forgot' what date it was on.



82% of people celebrated at home, +3% YOY



curry week...

Indian accompaniments were up **+5.8%** in Curry week 2024 vs previous year.

The Indian sub category was up **+2.7%** in Curry Week 2024 vs the previous year.

*Indian Kits saw **+8.7%** growth in curry week 2024 vs the previous year.*

The Indian sub cat saw **2%** value sales growth in the total market in Curry week.

Sharwood's Poppadums are **#1** in the market

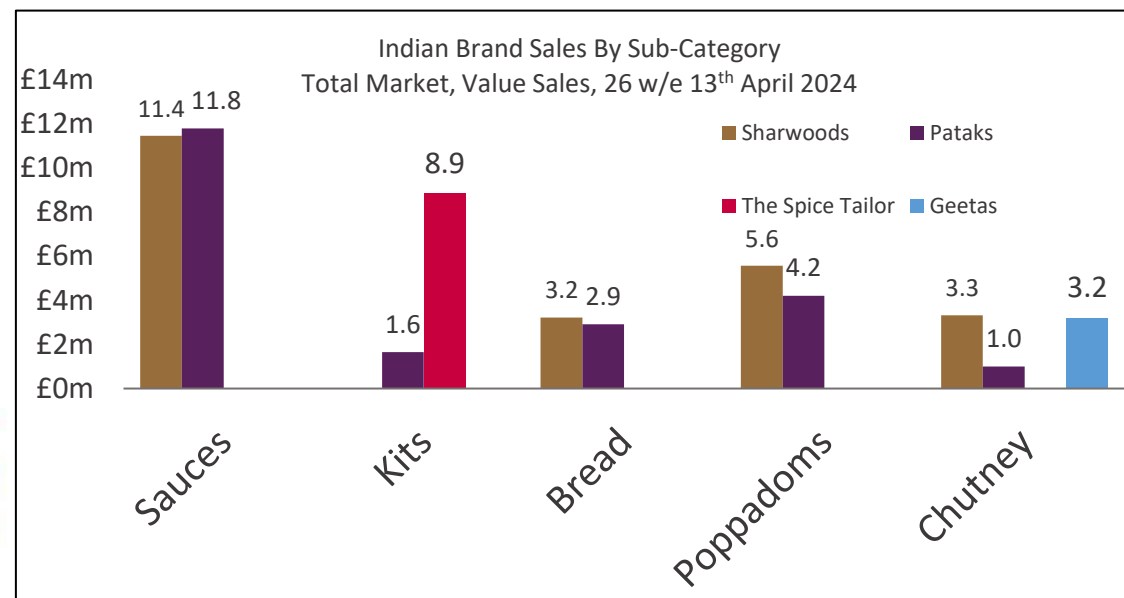
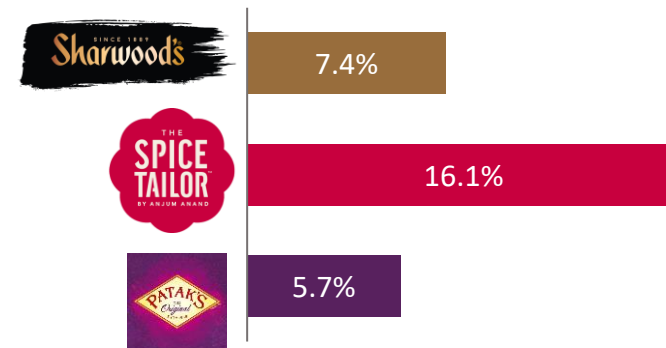
Sharwood's is the **#1** brand in Indian cooking sauces in Independent retailers

*Indian kits grew **+4%** in the 4 weeks up to Curry Week in the total market.*

9TH - 15TH OCTOBER 2025
ARE YOU STOCKING THE BEST
SELLING INDIAN SKU'S?



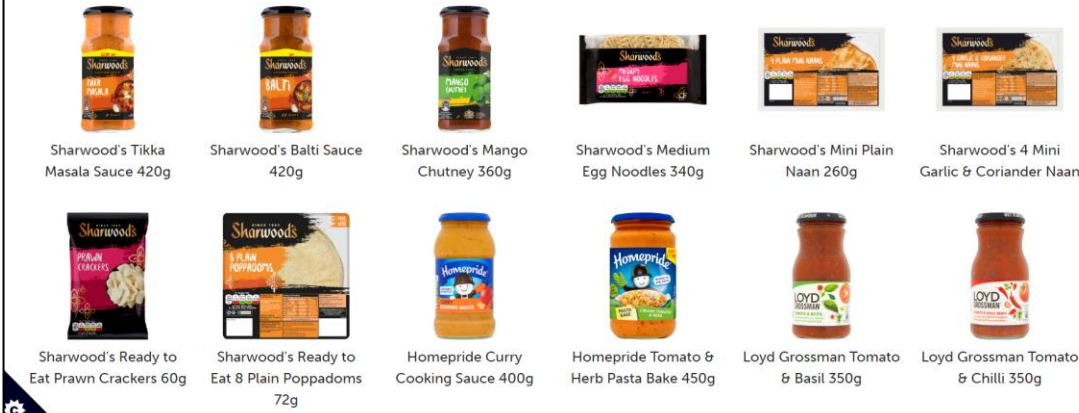
Indian Brands YoY% Growth
Total Market, Value Sales, 52 w/e 13th April 2024



SO HOW can we SUPPORT?



GET YOUR CORE RANGE RIGHT



- Strong portfolio of insights and data, including our own internal AAA surveys.
- Internal planogram support
- MCR & Core range leaflets and documents

GROW YOUR SALES

✓ *Stock the best-selling range*

48% of shoppers are on a 'top up' mission when visiting a convenience store, so make sure you've got brands that shoppers will recognise.

✓ *Offer the complete solution*

With 1 in 5 shoppers looking for a meal this evening, provide meal ideas by ranging Cooking Sauces alongside pasta, rice or noodles.

✓ *Create disruptive displays*

Use eye-catching point of sale material to capture shopper attention. Freestanding display units are a great way to disrupt the shopper and drive incremental sales.

✓ *Maximise your offering*

Target key calendar events - such as Chinese New Year, National Curry Week and Diwali - with our range of sauces to drive additional sales