

Report Price: £2195 | \$2995 | €2600

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

This report looks at the following areas:

- Companies must continue to promote usage occasions beyond bread
- Further NPD needed in reduced- and no added sugar products
- Ethical attributes are an underexplored opportunity



"Further innovation in no added and reduced-sugar products is essential in view of government reformulation targets and widespread consumer concerns over sugar. Where a lower sugar content results in a less sweet taste and more sophisticated flavour profile, this could also help companies retain users in the category for longer."

– Alice Baker, Research Analyst

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	s +1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

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



Table of Contents

OVERVIEW

- What you need to know
- Products covered in this Report

EXECUTIVE SUMMARY

- The market
- Sweet spreads volume sales remain resilient over 2014-19
- Rising value sales and falling volumes projected for 2019-24
 Figure 1: UK retail value sales of sweet and nut spreads, 2014-24
- Peanut butter leads on value sales but jam/conserve leads on volumes
- War on sugar continues
- Companies and brands
- Own-label continues to lead the market but sales fall in 2019

Figure 2: Leading brands' shares in the UK sweet and nut spreads market, by value, 2018/19*

- Rise in no added sugar, high protein and vegan claims in 2018
- More crossover brands enter the sweet spreads market
- Advertising spend falls in 2018
- · Hartley's leads on value and Rowse on ethical perceptions
- The consumer
- Over eight in ten adults eat sweet or nut spreads
 Figure 3: Usage of sweet and nut spreads, by type, May 2019
- On bread/toast is the leading usage occasion for sweet spreads

Figure 4: Usage occasions for selected types of sweet and nut spreads, May 2019

Dessert-inspired flavours and superfood ingredients attract interest

Figure 5: Interest in innovation in sweet and nut spreads, May 2019

 All-natural ingredients are most widely seen as worth paying more for

Figure 6: Attributes seen as worth paying more for in sweet and nut spreads, May 2019

Sugar concerns surround the category

Figure 7: Behaviours relating to sweet and nut spreads, May 2019

Palm oil is a deterrent to many

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

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



Figure 8: Attitudes towards sweet and nut spreads, May 2019

What we think

ISSUES AND INSIGHTS

- Companies must continue to promote usage occasions beyond bread
- The facts
- The implications
- Further NPD needed in reduced- and no added sugar products
- The facts
- The implications
- Ethical attributes are an underexplored opportunity
- The facts
- The implications

THE MARKET - WHAT YOU NEED TO KNOW

- Sweet spreads volume sales remain resilient over 2014-19
- Rising value sales and falling volumes projected for 2019-24
- Peanut butter leads on value sales but jam/conserve leads on volumes
- War on sugar continues

MARKET SIZE AND FORECAST

- Sweet spreads volume sales remain resilient over 2014-19 despite demonisation of sugar
- ...but sugar concerns and changing eating habits limit growth

Figure 9: UK retail value and volume sales of sweet and nut spreads, 2014-24

- Volume and value sales fall in 2019
- Rising value sales and falling volume sales projected for 2019-24
- Retailer price competition to curb the effects of inflation
- Ageing population to hinder volume sales

Figure 10: UK retail value sales of sweet and nut spreads, 2014-24

Figure 11: UK retail value and volume sales of sweet and nut spreads, 2014-24

Forecast methodology

MARKET SEGMENTATION

Honey leads on value sales but jam/conserve leads on volumes

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	EMEA	+44 (0) 20 7606 4533
	Brazil	0800 095 9094
	Americas	+1 (312) 943 5250
	China	+86 (21) 6032 7300
	APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

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



Figure 12: Value and volume sales of sweet and nut spreads, by segment, 2017-19

- Sweet spreads see falling or flat volume sales over 2018-19 due to decline in carrier products
- · Honey's sales slip after years of growth
- Nut butter trend runs out of steam

MARKET DRIVERS

- War on sugar continues
- Sweet spreads sector makes progress on sugar reduction...
- ...but no added sugar and low/reduced sugar claims remain niche
- Natural sugar of fruit drives up sugar levels
- Grey area around whether no added sugar claims can be made on products with sweeteners
- · Various factors affect sweet spreads prices
- Sweet spreads' high import reliance makes future trade relations crucial
- · Seasonal workers are important for fruit harvests
- Weather extremes of 2018 and 2019 affect fruit production
- · Volatility in cocoa prices affects chocolate products
- Demographic changes in the UK to hinder the category
- · Ageing population offers little support for sweet spreads...
- · ...with the exception of marmalade
- · Slowing growth in the child population to limit sales growth
- Weakness of carrier products impedes the category
- Ongoing decline of pre-packed bread pushes down sweet spreads volume sales
- ...as does the fall in home baking

COMPANIES AND BRANDS - WHAT YOU NEED TO KNOW

- Own-label continues to lead the market but sales fall in 2019
- Rise in no added sugar, high protein and vegan claims in 2018
- More crossover brands enter the sweet spreads market
- Advertising spend falls in 2018
- · Hartley's leads on value and Rowse on ethical perceptions

MARKET SHARE

Own-label loses out to overall decline in the market
Figure 13: Leading brands' sales and shares in the UK sweet
and nut spreads market, by value and volume, 2016-17-2018/
19

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	EMEA	+44 (0) 20 7606 4533
	Brazil	0800 095 9094
	Americas	+1 (312) 943 5250
	China	+86 (21) 6032 7300
	APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

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



Figure 14: Leading brand owners' sales and shares in the UK sweet and nut spreads market, by value and volume, 2016-17-2018/19

Nutella shifts away from promotions on larger formats

LAUNCH ACTIVITY AND INNOVATION

 Aldi, Sainsbury's and Tesco take the top spots on launch activity

Figure 15: New product launches in the UK sweet and nut spreads market, by top 10 companies, 2015–19 (sorted by 2018)

- · Tesco draws on its history with new tertiary brand
- Lidl looks to rival Lotus with new biscuit spreads
- M&S experiments with botanical and seasonal flavours
 Figure 16: Examples of own-label sweet spreads launches,
 2018
- Confiture and fruit spreads lead on launch activity in 2018
- Honey shows strongest rate of growth in launches over 2015-18

Figure 17: New product launches in the UK sweet and nut spreads market, by segment

- No added sugar claims grow but remain niche
- Brands and retailers take various approaches to cut sugar in their products

Figure 18: Examples of no added sugar and low/reduced sugar sweet spreads launches with sweeteners, 2018-19
Figure 19: Examples of no added sugar and low/reduced sweet spreads launches referencing 'naturally occurring fruit sugars only' or increased fruit content, 2018-19

- High/added protein claims grow, although from a low base
- Nut butter launches supplement high protein claims with additional health claims for all-round healthy positioning
 Figure 20: Examples of nut butter launches with high/added protein claims, 2018
- Grenade enters the category with high-protein chocolate spreads

Figure 21: Example of Grenade high protein chocolate spread range, 2018

- Sprouted wheat product is promoted as a healthier alternative to chocolate spread
- Leading and niche brands experiment with fortified products
- Rowse claims UK first with Vitamin C fortified honey

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	EMEA	+44 (0) 20 7606 4533
	Brazil	0800 095 9094
	Americas	+1 (312) 943 5250
	China	+86 (21) 6032 7300
	APAC	+61 (0) 2 8284 8100

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



Figure 22: Rowse launches Vitamin C fortified honey, 2018

 Cereal brand launches high-fibre syrup with digestive health claims

Figure 23: High-fibre syrup launch from Troo, 2018

- Smaller brands launch vegan honey alternatives
 Figure 24: Examples of vegan honey alternatives, 2018-19
- · Ethical claims are rare in sweet spreads
- Organic brands highlight their sustainable practices
 Figure 25: Examples of organic sweet spreads launches referencing sustainable farming methods, 2019
- New honey brand puts the focus on bee welfare
 Figure 26: Honey brand emphasises its high animal welfare,
 2019
- No/sustainable palm oil claims rise in 2018
- Organic brands lead on no/sustainable palm oil claims in 2018/19

Figure 27: Examples of organic chocolate spread launches with 'palm oil free' labels, 2018

 Nut butters supplement no/sustainable palm oil claims with health claims

Figure 28: Examples of nut butter launches combining no/sustainable palm oil claims with health claims, 2018

- More crossover brands enter the sweet spreads category
- Gü and Lindt bring a premium element to the chocolate spreads category

Figure 29: Chocolate spread products from Lindt and Gü,

Philadelphia with Milka offers potential chilled rival to chocolate spread

Figure 30: Philadelphia with Milka offers a potential chilled rival to chocolate spread

- Free-from brands explore chocolate and caramel spreads...
- ...including breadstick/biscuit-dip products

Figure 31: Examples of chocolate/caramel spread products from free-from brands, 2018-19

- Marmite extends into sweet spreads with peanut butter
 Figure 32: Marmite extends into sweet spreads with peanut butter
- Pinkster launches jam made with leftover raspberries from its gin-making process

Figure 33: Craft gin brand uses leftover raspberries to make jam, 2018

· Brands and retailers innovate with flavours

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

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



Cocktail-inspired flavours appeal especially to under-35s

Figure 34: Examples of sweet spreads launches with alcohol-infused/cocktail-inspired flavours, 2018

- Duerr's launches new flavours and links up with artists
- Niche brands experiment with trendy ingredients
 Figure 35: Examples of sweet spreads launches with on-trend ingredients, 2018–19
- Whole Earth draws inspiration from the coffee category
 Figure 36: Whole Earth draws inspiration from the coffee category, 2019

ADVERTISING AND MARKETING ACTIVITY

Advertising spend falls in 2018

Figure 37: Total above-the line, online display and direct mail advertising expenditure on sweet and nut spreads, 2015–19 (sorted by 2018)

- Rowse praises honey as a natural wonder...
- ...and urges people to help save the bees
- Ferrero promotes Nutella's suitability for various seasonal occasions
- Pancake Day campaign repeated over 2017-19
- Back-to-school campaign portrays Nutella as taking the stress out of school mornings
- Christmas social media campaign positions Nutella as central to family life
- · Meridian gives out free cookies in experiential campaign
- Palm oil controversy reignites
- Iceland Christmas advert portrays palm oil as destroying the rainforest

Figure 38: Index of Google searches in the UK with 'palm oil' as the subject, August 2018–July 2019

- Ferrero defends its palm oil sourcing via YouTube
- Nielsen Ad Intel coverage

BRAND RESEARCH

Brand map

Figure 39: Attitudes towards and usage of selected brands, July 2019

Key brand metrics

Figure 40: Key metrics for selected brands, July 2019

- Brand attitudes: Hartley's is most widely seen as good value
 Figure 41: Attitudes, by brand, July 2019
- Brand personality: Nutella scores highest on the fun factor

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

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



Figure 42: Brand personality - Macro image, July 2019

Hartley's has a traditional and family image
 Figure 43: Brand personality – Micro image, July 2019

- Brand analysis
- Nutella is the most recommended brand
 Figure 44: User profile of Nutella, July 2019
- Bonne Maman Conserves is seen as high quality and (somewhat) special

Figure 45: User profile of Bonne Maman Conserves, July 2019

- Rowse is most widely seen as natural and ethical
 Figure 46: User profile of Rowse, July 2019
- Hartley's Jam has a traditional and family image
 Figure 47: User profile of Hartley's Jam, July 2019
- Under-25s have the most favourable views of Sun-Pat's healthiness

Figure 48: User profile of Sun-Pat, July 2019

THE CONSUMER - WHAT YOU NEED TO KNOW

- · Over eight in ten adults eat sweet or nut spreads
- On bread/toast is the leading usage occasion for sweet spreads
- Dessert-inspired flavours and superfood ingredients attract interest
- All-natural ingredients are most widely seen as worth paying more for
- Sugar concerns surround the category
- Palm oil is a deterrent to many

USAGE OF SWEET AND NUT SPREADS

- · Over eight in ten adults eat sweet or nut spreads
- Jam/conserve has the highest usage

Figure 49: Usage of sweet and nut spreads, by type, May 2019

 Under-35s and parents are the core users of sweet and nut spreads

Figure 50: Usage frequency for sweet and nut spreads, May 2019

- Youth and family bias is especially pronounced for some sweet spreads
- Marmalade usage peaks among over-55s
- 45% of adults use only one or two types of sweet spreads
 Figure 51: Repertoire of sweet and nut spreads eaten/used,
 May 2019

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	EMEA	+44 (0) 20 7606 4533
	Brazil	0800 095 9094
	Americas	+1 (312) 943 5250
	China	+86 (21) 6032 7300
	APAC	+61 (0) 2 8284 8100

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



Parents and under-35s have the most varied repertoires

USAGE OCCASIONS FOR SELECTED TYPES OF SWEET AND NUT SPREADS

On bread/toast is the leading usage occasion for sweet spreads

Figure 52: Usage occasions for selected types of sweet and nut spreads, May 2019

 Jam/conserve brands look to encourage usage beyond bread

Figure 53: Examples of jam/conserves with on-pack serving suggestions, 2019

- · Honey benefits from the growth in hot cereals
- Honey also leads on usage in drinks
- Link-ups with supermarkets can help encourage use in cooking/baking

INTEREST IN INNOVATION IN SWEET AND NUT SPREADS

 Dessert-inspired flavours appeal especially to under-25s and parents...

Figure 54: Interest in innovation in sweet and nut spreads, May 2019

Niche brands explore dessert flavours

Figure 55: Selection of curds by The Cherry Tree*, 2019
Figure 56: International example of a sweet spread with a
dessert-inspired flavour

- Dessert brand Gü enters the sweet spreads category
- ...as does chocolate spread with additions

Figure 57: examples of chocolate spreads with additions, 2018–19

Opportunities for link-ups with biscuit brands

Figure 58: International examples of chocolate spreads with biscuit pieces, 2018

- Seasonal flavours are an underexplored opportunity
- Sweet spreads with superfood ingredients appeal to one in five
- High-fruit spreads are well-placed to tap into interest in superfoods

Figure 59: Niche brands launch fruit spreads with chia seeds, 2018-19

European brands experiment with turmeric and matcha tea

Figure 60: International examples of sweet spreads with superfood ingredients, 2018-19

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

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



 Companies must consider consumers' divided opinions on superfoods

ATTRIBUTES SEEN AS WORTH PAYING MORE FOR IN SWEET AND NUT SPREADS

- Multiple options for companies to encourage trading up
 Figure 61: Attributes seen as worth paying more for in sweet and nut spreads, May 2019
- All natural ingredients are the top attribute people would pay more for
- Ethical ingredients appeal to a quarter
- · Farmers' pay guarantees should appeal...
- · ...as should jams and marmalades made from surplus fruit
- European honey brands emphasise their care for bees
 Figure 62: International examples of honey launches
 highlighting their care for bee welfare and preserving the
 bee population, 2018-19
- Lemon curds made with free-range eggs could make this aspect more tangible
- High fruit/nut/cocoa content appeals to one in five
- Explain the purpose of other ingredients in sweet spreads

BEHAVIOURS RELATING TO SWEET AND NUT SPREADS

- Opportunities for sweet spreads brands to extend into sweet snacks
- Extending into snacks could help sweet spreads appeal during on-the-go occasions

Figure 63: Behaviours relating to sweet and nut spreads, May 2019

- Snacks could also help marmalade attract younger users
- Brand extensions from sweet spreads brands are rare
 Figure 64: Examples of sweet snack launches from sweet spreads brands, 2017-18
- Sugar concerns surround the category
- Higher concerns over sugar among over-65s helps to explain less frequent usage of sweet spreads
- Taste trumps healthiness for many people
- Need for companies making sugar reductions to reassure consumers on taste
- Allow consumers a say in the reformulation process
 Figure 65: German supermarket invites shoppers to vote on sugar reduction, 2018

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	EMEA	+44 (0) 20 7606 4533
	Brazil	0800 095 9094
	Americas	+1 (312) 943 5250
	China	+86 (21) 6032 7300
	APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

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



ATTITUDES TOWARDS SWEET AND NUT SPREADS

- Anti-plastic movement could see some brands losing sales
 Figure 66: Attitudes towards sweet and nut spreads, May 2019
- Environmentally-friendly packaging claims are widespread in sweet spreads, but little real innovation

Figure 67: Examples of sweet spreads launches promoting their sustainable packaging, 2018

- Manufacturers need to strike the right balance on convenience and the environment
- Palm oil is a deterrent for many
- Use of palm oil is widespread, but no/sustainable palm oil claims rise in 2018
- Tangible details of support for the environment should boost the appeal of spreads without palm oil...
- ...and of those using sustainable palm oil

Figure 68: International examples of chocolate spreads giving specific details on sustainable palm oil sourcing, 2018-19

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- Abbreviations
- Consumer research methodology

APPENDIX - MARKET SIZE AND FORECAST

Figure 69: Forecast of UK sales of sweet and nut spreads, by value, best- and worst-case, 2019-24

Figure 70: Forecast of UK sales of sweet and nut spreads, by volume, best- and worst-case, 2019-24

Forecast methodology

APPENDIX - MARKET SEGMENTATION

Figure 71: Value and volume sales of sweet and nut spreads, by segment, 2014-19

APPENDIX - LAUNCH ACTIVITY AND INNOVATION

Figure 72: New product launches in the UK sweet and nut spreads market, by top 20 claims, 2015-19 (sorted by 2018)

APPENDIX – USAGE OCCASIONS FOR SELECTED TYPES OF SWEET AND NUT SPREADS

Figure 73: Repertoire of usage occasions for selected types of sweet and nut spreads, May 2019

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit mintel.com.