

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:

- Offering a healthy, tasty and natural combination remains the big challenge for brands in spreads
- Wealth of attributes can be highlighted to tap into interest in sustainability in yellow fats and oils
- Flavoured oils and butters for cooking different recipes offer scope to add value to the market

Sustainability and health claims both offer scope for adding value to the market, but there is no room to compromise on taste given that it is more important than anything else for most consumers when it comes to butter/spreads. Naturalness is also important, given its association with being healthy. As such, the challenge remains for brands to bring together taste, health, naturalness and sustainability for a winning combination.



"Taste is more important than anything else in butter and spreads, and more than two thirds of buyers say they eat too little butter/spread to worry about it being healthy. However, this still leaves a sizeable minority of buyers for whom healthiness is an important selling point."

– Richard Caines, Senior

Buy this report now

Food & Drink 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
- Declining volumes but growing value sales in butter and spreads

Figure 1: Best- and worst-case forecast of UK retail value sales of butter and spreads, 2014-24

- Oil sales boosted by extra virgin olive and rapeseed oil
 Figure 2: Best- and worst-case forecast of UK retail value
 sales of edible oils, 2014-24
- Declining bread sales spell bad news for butter and spreads
- Scratch cooking and home baking important drivers of sales
- Population growth is a key growth driver for yellow fats and oils
- Companies and brands
- Lurpak retains formidable lead

Figure 3: Leading brands' shares in the UK retail yellow fats market (including butter, margarine and spreads, and cooking fats), by value, 2018/19*

Dip in value sales for most brands in cooking oils
 Figure 4: Leading brands' shares in the UK retail cooking oils
 market, by value, 2018/19*

Filippo Berio extends lead in olive oil segment
 Figure 5: Leading brands' shares in the UK retail olive oil market, by value, 2018/19*

- More plant-based butter alternatives
- New recipes in spreads put focus on naturalness and less fat
- New infusions add to variety in edible oils
- Extra virgin and cold-pressed oils emphasise quality and purity
- The consumer
- Nine in 10 people buy butter or spreads
 Figure 6: Types of butter and spreads bought in the last 3 months, July 2019
- Eight in 10 people buy edible oils

Figure 7: Types of edible liquid oils and solid oils/fats bought in the last 3 months, July 2019

Toast, bread and sandwiches are top uses for spreads

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: How different types of yellow fats and edible oils were used in the last 3 months, July 2019

- Low saturated fat top healthy factor for spreads
 Figure 9: Factors judged to make a spread healthy, July 2019
- Big focus on price presents challenge to oils
 Figure 10: Factors considered important when buying oil, by purpose, July 2019
- Need to communicate sustainability in spreads and oils
- Brands should tap into interest in more flavours for cooking
 Figure 11: Behaviours and attitudes towards yellow fats and oils, July 2019
- What we think

ISSUES AND INSIGHTS

- Offering a healthy, tasty and natural combination remains the big challenge for brands in spreads
- The facts
- The implications
- Wealth of attributes can be highlighted to tap into interest in sustainability in yellow fats and oils
- The facts
- The implications
- Flavoured oils and butters for cooking different recipes offer scope to add value to the market
- The facts
- The implications

THE MARKET - WHAT YOU NEED TO KNOW

- Declining volumes but growth in value sales in butter and spreads
- Strong value performance of butter driven by higher prices
- Growth in sales of edible oils seen in 2018
- Sales boosted by extra virgin olive and rapeseed oil in 2018
- Declining bread sales spell bad news for butter and spreads
- Scratch cooking and home baking important drivers of sales
- Commodity butter and oil prices impact on retail prices
- Population growth is a key driver for yellow fats and oils
- Brexit uncertainties make price trends difficult to predict

MARKET SIZE AND FORECAST

Rise in butter prices drives growth in total sales
 Figure 12: UK retail value sales of yellow fats and edible oils,
 2014-24*

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 13: Best- and worst-case forecast of UK retail value sales of yellow fats and edible oils, 2014-24*

Butter boosts value of butter and spreads market

Figure 14: UK retail value and volume sales of butter and spreads, 2014-24*

Figure 15: Best- and worst-case forecast of UK retail value sales of butter and spreads, 2014-24*

Value sales of edible oils boosted by olive and rapeseed oil

Figure 16: UK retail value and volume sales of edible oils, 2014-24

Figure 17: Best- and worst-case forecast of UK retail value sales of edible oils, 2014-24

Forecast methodology

MARKET SEGMENTATION

- Strong value performance of butter driven by higher prices
 Figure 18: UK retail value and volume sales of yellow fats, by seament, 2017-19
- Extra virgin and rapeseed boost 2018 sales of edible oils Figure 19: UK retail value and volume sales of edible oils, by type, 2017-19

MARKET DRIVERS

- Declining bread sales bad news for butter and spreads
- Changing breakfast and lunch patterns impacting on demand
- Scratch cooking and home baking important drivers of sales
- · Commodity butter and oil prices impact on retail prices
- Total population growth is important for yellow fats and oils which the vast majority buy

Figure 20: Trends in the age structure of the UK population, 2014-24

Brexit uncertainties make price trends difficult to predict

COMPANIES AND BRANDS - WHAT YOU NEED TO KNOW

- Lurpak retains its formidable lead
- Clover and Utterly Butterly benefit from rising butter prices
- · Dip in value sales for most brands in cooking oils
- Filippo Berio extends lead in olive oil segment
- More plant-based butter alternatives
- New recipes in spreads put focus on naturalness and less fat
- Arla launches 'Softest' versions for Lurpak and Anchor
- New infusions add to variety in edible oils

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
America	as +1 (312) 943 5250
America China	as +1 (312) 943 5250 +86 (21) 6032 7300

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



- Extra virgin and cold-pressed oils emphasise quality and purity
- Lurpak the most trusted brand

MARKET SHARE

- · Buttery spreads make biggest gains in yellow fats market
- · Lurpak retains its formidable lead
- KKR and Saputo move into the market
- Clover and Utterly Butterly benefit from rising butter prices
 Figure 21: Leading brands' sales and shares in the UK retail
 yellow fats market (including butter, margarine and spreads,
 and cooking fats), by value and volume, 2017/18 and 2018/19
- Dip in value sales for most brands in cooking oils
 Figure 22: Leading brands' sales and shares in the UK retail cooking oils market, by value and volume, 2017/18 and 2018/10
- Filippo Berio extends lead in olive oil segment
 Figure 23: Leading brands' sales and shares in the UK retail olive oil market, by value and volume, 2017/18 and 2018/19
- No dominant brands in fragmented speciality oils segment
 Figure 24: Leading brands' sales and shares in the UK retail
 speciality oils market, by value and volume, 2017/18 and 2018/
 19

LAUNCH ACTIVITY AND INNOVATION

- Oils account for nearly two thirds of new launches
 Figure 25: New product launches in the UK butter, spreads and edible oils market, by category, 2014-19
- More plant-based butter alternatives
- Recent launches explore unusual ingredients
 Figure 26: Examples of new launches of plant-based and dairy-free butter alternatives in butter and spreads, 2018/19
- · New recipes in spreads put focus on naturalness and less fat
- Upfield updates Flora
- Clover Light introduces new recipe
 Figure 27: Examples of new launches in spreads, 2018/19
- Arla launches 'Softest' versions for Lurpak and Anchor
- New launches in ghee and ghee alternatives
 Figure 28: Examples of new ghee and ghee alternative launches in butter and spreads, 2018/19
- New infusions add to variety in edible oils
 Figure 29: Examples of new launches of infused oils, 2018/19
- Blends of two different oils add differentiation

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 30: Examples of different blend combinations in new launches of oils, 2018/19

Extra virgin and cold-pressed oils emphasise quality and purity

Figure 31: Examples of cold-pressed and extra virgin new launches in oils, 2018/19

• Launches of more niche seed oils
Figure 32: Examples of new launches in seed oils, 2018/19

Rare examples of task-specific oils
 Figure 33: Examples of new launches in task-specific oils and sprays, 2018/19

ADVERTISING AND MARKETING ACTIVITY

Decline in spending on main media advertising continues
 Figure 34: Total above-the-line, online display and direct mail advertising expenditure on yellow fats and oils, 2015-19
 Figure 35: Total above-the-line, online display and direct mail advertising expenditure on yellow fats and oils, by category, 2015-19

Arla Foods biggest spender in 2018

Figure 36: Total above-the-line, online display and direct mail advertising expenditure on yellow fats and oils, by advertiser, 2015-19

- · Anchor plays up infinite uses of product
- Lurpak focuses on great-tasting food message
- Flora pushes plant-based nutrition message
- Return to TV advertising for Bertolli
- Country Life launches digital campaign
- Crisp 'n Dry biggest advertiser in oils
- Nielsen Ad Intel coverage

BRAND RESEARCH

Brand map

Figure 37: Attitudes towards and usage of selected brands, September 2019

Key brand metrics

Figure 38: Key metrics for selected brands, September 2019

- Brand attitudes: Lurpak most worth paying more for Figure 39: Attitudes, by brand, September 2019
- Brand personality: All brands seen as accessible by most people

Figure 40: Brand personality – macro image, September 2019

· Lurpak is seen as the most delicious and indulgent brand

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
Americas China	+1 (312) 943 5250 +86 (21) 6032 7300

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 41: Brand personality – micro image, September 2019

- Brand analysis
- Lurpak stands for consistently high quality
 Figure 42: User profile of Lurpak, September 2019
- Anchor is seen as the most traditional brand
 Figure 43: User profile of Anchor, September 2019
- Traditional and natural associations are key strengths for Country Life

Figure 44: User profile of Country Life, September 2019

- Flora seen the most widely as healthy
 Figure 45: User profile of Flora, September 2019
- Clover seen most widely as a family brand
 Figure 46: User profile of Clover, September 2019

THE CONSUMER - WHAT YOU NEED TO KNOW

- Nine in 10 people buy butter or spreads
- Eight in 10 people buy edible oils
- · Toast, bread and sandwiches are top uses for spreads
- · Olive oils used most for frying, roasting and on cold food
- Low saturated fat top healthy factor for spreads
- All-natural ingredients are associated with health by a third
- · Big focus on price when buying oils
- · Health considerations also matter in choice of oils
- · Need to communicate sustainability in spreads and oils
- · Brands should tap into interest in more flavours for cooking

BUYING OF YELLOW FATS

- Nine in 10 people buy butter or spreads
 Figure 47: Types of butter and spreads bought in the last 3 months, July 2019
- Nearly two in five rely on an all-round yellow fat
 Figure 48: Number of different types of butter and spreads bought in the last 3 months, July 2019
- · Younger people more likely to buy butter

BUYING OF EDIBLE OILS

- Eight in 10 buy edible oils
 Figure 49: Types of edible liquid of
 - Figure 49: Types of edible liquid oils and solid oils/fats bought in the last 3 months, July 2019
- Half of people buy more than one type of oil
 Figure 50: Number of different types of edible oils bought in last 3 months, July 2019
- Higher-income households more likely to buy most oils

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





HOW YELLOW FATS AND EDIBLE OILS ARE USED

- Toast, bread and sandwiches are top uses for spreads
 Figure 51: How different types of yellow fats and edible oils were used in the last 3 months, July 2019
- · Olive oil should focus on versatility and health messages
- Cooked food and home baking offer opportunities for butter and spread brands

FACTORS MAKING A SPREAD 'HEALTHY'

- · Low saturated fat top healthy factor for spreads
- Half of buyers limit saturated fat in their diet on medical advice

Figure 52: Factors judged to make a spread healthy, July 2019

- All-natural ingredients are associated with health by a third on health grounds
- Functional health benefits also worth highlighting

FACTORS CONSIDERED IMPORTANT WHEN BUYING OIL

- Big focus on price when buying oils
 Figure 53: Factors considered important when buying oil, by purpose, July 2019
- · Health considerations matter in choice of oils
- · Low saturated fat is top health consideration in oils
- · Minority interest in the nutrients of oils
- Reference to production methods and origins adds differentiation among a minority

CONSUMER BEHAVIOURS AND ATTITUDES

- Need to communicate sustainability in spreads and oils
 Figure 54: Behaviours and attitudes towards yellow fats and oils, July 2019
- Organic seen as better for the environment by three in five
- · Interest in butter with milk from grass-fed cows
- Brands should tap into interest in more flavours for cooking

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- Abbreviations
- Consumer research methodology

APPENDIX - MARKET SIZE AND FORECAST

Forecast methodology

Figure 55: UK retail value and volume sales of butter, 2014-19

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





Figure 56: UK retail value and volume sales of spreads, 2014-19

Figure 57: Best- and worst-case forecast of total UK retail value sales of butter and spreads, 2019-24

Figure 58: Best- and worst-case forecast of UK retail volume sales of butter and spreads, 2014-24

Figure 59: Best- and worst-case forecast of total UK retail volume sales of butter and spreads, 2019–24

Figure 60: Best- and worst-case forecast of total UK retail value sales of edible oils, 2019-24

Figure 61: Best- and worst-case forecast of UK retail volume sales of edible oils, 2014-24

Figure 62: Best- and worst-case forecast of total UK retail volume sales of edible oils, 2019-24

APPENDIX - MARKET SHARE

Figure 63: Leading manufacturers' sales and shares in the UK retail yellow fats market (including butter, margarine and spreads, and cooking fats), by value and volume, 2017/18 and 2018/19

Figure 64: Leading manufacturers' sales and shares in the UK retail cooking oil market, by value and volume, 2017/18 and 2018/19

Figure 65: Leading manufacturers' sales and shares in the UK retail olive oil market, by value and volume, 2017/18 and 2018/10

Figure 66: Leading manufacturers' sales and shares in the UK retail speciality oils market, by value and volume, 2017/18 and 2018/19

Figure 67: Leading brands' sales and shares in the UK retail butter market, by value and volume, 2017/18 and 2018/19
Figure 68: Leading manufacturers' sales and shares in the UK retail butter market, by value and volume, 2017/18 and 2018/10

Figure 69: Leading brands' sales and shares in the UK retail margarine and spreads market, by value and volume, 2017/18 and 2018/19

Figure 70: Leading manufacturers' sales and shares in the UK retail margarine and spreads market, by value and volume, 2017/18 and 2018/19

Figure 71: Leading brands' sales and shares in the UK retail cooking fats market, by value and volume, 2017/18 and 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 72: Leading manufacturers' sales and shares in the UK retail cooking fats market, by value and volume, 2017/18 and 2018/19

APPENDIX - LAUNCH ACTIVITY AND INNOVATION

Figure 73: New product launches in the UK butter, margarine and spreads market, by claim (sorted by 2018), 2014-19

Figure 74: New product launches in the UK edible oils market, by claim (sorted by 2018), 2014-19

Figure 75: New product launches in the UK butter market, by claim (sorted by 2018), 2014-19

Figure 76: New product launches in the UK margarine and spreads market, by claim (sorted by 2018), 2014-19

Figure 77: New product launches in the UK butter market, by launch type, 2014-19

Figure 78: New product launches in the UK margarine and spreads market, by launch type, 2014-19

Figure 79: New product launches in the UK oils market, by launch type, 2014-19

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



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.