

# Bread - UK - 2021

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:

- The impact of COVID-19 on the bread market.
- Types of bread used and bought.
- Launch activity and future product development opportunities.
- Consumer behaviours and attitudes related to bread.

That 50% of bread eaters/buyers say health reasons have motivated them to cut down on the amount of bread they eat poses a continuing challenge to the market in terms of growing volume sales. This is especially relevant in the wake of the COVID-19 outbreak, which has reinforced the importance of getting the right nutrition to support overall health and comes despite steps from the bread industry to improve the health credentials of their products.

Bread enjoyed a boost to value and volume sales during 2020 due to lockdowns and stay-at-home edicts fuelling a shift from out-of-home meal and drink occasions to the home. However, this boost is expected to wane in 2021 and going forward as people slowly return to the workplace/places of study and foodservice venues, the successful vaccine rollout emboldening people. Sales in the market are anticipated to fall 1.9% by value and 3.2% by volume in 2021 to reach £3.6 billion and 1.7 billion kg.

The move to a new normality will see volume sales return to their long-term decline over the next five years, as bread faces competition from out-of-home venues and given the forecast decline in key user age groups such as younger people. The predicted enduring rise in working at home and the rise in over-55s, who show above-average usage of the dominant prepacked bread, will offer some limited support for sales.

Packaging is high on consumers' agendas, with plastic having become the number one foe in the fight against packaging waste. Encouragingly, 46% of bread eaters/buyers would be willing to pay more for bread in environmentally



“That 50% of bread eaters/buyers say health reasons have motivated them to cut down on the amount of bread they eat poses a continuing challenge to the market in terms of growing volume sales.”

– Amy Price, Senior Food and Drink Analyst

## Buy this report now

Visit [store.mintel.com](https://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.

friendly packaging, with the COVID-19 pandemic raising awareness around sustainability issues.

### 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.

### Buy this report now

Visit [store.mintel.com](https://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.

## Table of Contents

### OVERVIEW

- **Key issues covered in this Report**
- **COVID-19: market context**
- **Economic and other assumptions**
- **Products covered in this Report**

### EXECUTIVE SUMMARY

- **Impact of COVID-19 on bread**

Figure 1: Short, medium and long-term impact of COVID-19 on bread, 2021

- **The market**

- **Market size and forecast**

Figure 2: Value forecast for the UK retail bread market, 2016-26

- **Prepacked bread sees sales slow**

Figure 3: UK retail sales of bread, by segment, 2019-21

- **Companies and brands**

- **Warburtons continues to lead despite sales fall**

Figure 4: Leading brands shares' in the UK prepacked bread retail market, by value, 2020/21\*

- **Warburtons performs well in speciality bread and rolls**

Figure 5: Leading brands shares' in the UK speciality bread and rolls retail market, by value, 2020/21\*

- **Hovis goes upmarket with 1886 range**

- **Advertisers step up spend in 2021; Warburtons leads spend**

- **The consumer**

- **97% buy bread; packaged sliced loaves remain the most popular**

Figure 6: Types of bread and bread products bought in the last month, 2020 and 2021

- **Britishness stands out**

Figure 7: Interest in bread concepts, 2021

- **Health concerns prompt people to cut back on bread**

Figure 8: Behaviours related to bread, 2021

- **Opportunities to push the emotional benefits of bread**

Figure 9: Attitudes towards bread, 2021

### ISSUES AND INSIGHTS

- **Opportunities to push emotional benefits of bread**
- **Push carrier role of bread as a way to explore flavours**
- **Bread makers should capitalise on willingness to pay more for environmentally friendly packaging**

### 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.

### Buy this report now

Visit [store.mintel.com](https://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.

- **Brand extensions into ISB and bake-at-home bread provide routes to growth**

**THE MARKET – KEY TAKEAWAYS**

- **Bread benefits from COVID-19 boost in 2020**
- **2021 sales set to fall as COVID boost wanes**
- **Market largely set to return to pre-pandemic long-term decline**
- **Prepacked bread sees sales slow**

**MARKET SIZE AND PERFORMANCE**

- **Impact of COVID-19 on bread**  
Figure 10: Short, medium and long-term impact of COVID-19 on bread, 2021
- **Bread benefits from COVID-19 boost in 2020**  
Figure 11: Retail value and volume sales of the UK bread market, 2015-20

**MARKET FORECAST**

- **2021 sales set to fall as COVID boost wanes**  
Figure 12: Value forecast for the UK retail bread market, 2016-26  
Figure 13: Volume forecast for the UK retail bread market, 2016-26
- **Market largely set to return to long-term volume decline**  
Figure 14: Key drivers affecting Mintel’s market forecast, 2015-25
- **Forecast methodology**

**COVID-19 SCENARIO PERFORMANCE**

- **Mintel’s approach to predicting the impact of COVID-19**
- **Fundamental differences in how COVID-19 is affecting consumer markets**
- **The risk of vaccine-resistant strains of COVID-19 adds uncertainty**  
Figure 15: COVID-19 scenario forecasts for the UK retail bread market, by value, 2016-26  
Figure 16: COVID-19 scenario forecasts for the UK retail bread market, by volume, 2016-26
- **A small sales difference between Mintel’s rapid COVID recovery and extended COVID disruption scenarios in 2021**
- **A setback to the vaccination programme could extend social distancing into 2022**

**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.

**Buy this report now**

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.

- **Mintel's rapid recovery scenario indicates a return to pre-COVID sales by the end of 2022**
- **COVID-19 market disruption: risks and outcomes**

Figure 17: Summary of Mintel scenario expectations and the impact on the bread market, 2021

**MARKET SEGMENTATION**

- **Prepacked bread accounts for almost half of sales but sales are down**
- **In-store and craft bakeries see sales rise on the back of reopenings**

Figure 18: UK retail sales of bread, by segment, 2019-21

- **White remains most popular; bread with bits sees fastest growth**

Figure 19: UK retail value sales of prepacked bread, by type, 2019-21

- **Speciality bread and rolls' growth falters in 2021**

Figure 20: UK retail value sales of speciality bread and rolls, by type, 2019-21

**MARKET DRIVERS**

- **Government emphasis on health intensifies under COVID-19**
- **HFSS food promotion and store location restrictions to come into place in 2022**
- **Advertising for HFSS food and drink to face new rules from end of 2022**
- **PHE launches more salt reduction targets for 2024**
- **Garlic bread affected by calorie reduction targets**
- **Consumer confidence returning to pre-pandemic levels**
- **Drop in young could hit bread alternatives; ageing population should aid packaged sliced loaves**

Figure 21: Trends in UK population, by age, 2015-20 and 2020-25

**COMPANIES AND BRANDS – KEY TAKEAWAYS**

- **Warburtons continues to lead despite sales fall; Hovis sees sales rise**
- **Warburtons and New York Bakery perform well in speciality bread and rolls**
- **Hovis goes upmarket with 1886 range**
- **NPD looks to tap into interest in health**
- **Advertisers step up spend in 2021; Warburtons leads spend**

**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.

**Buy this report now**

Visit [store.mintel.com](https://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.

## MARKET SHARE

- **Warburtons continues to lead despite sales fall**
- **Hovis manages to grow sales**  
Figure 22: Leading brands in the UK prepacked bread retail market, by value and volume, 2018/19-2020/21
- **Warburtons performs well in speciality bread and rolls**  
Figure 23: Leading brands in the UK speciality bread and rolls retail market, by value, 2018/19-2021/21
- **Other brands benefit from consumers' desire for variety**

## LAUNCH ACTIVITY AND INNOVATION

- **Private labels dominate NPD**  
Figure 24: New product launches in the UK bread market, by brands vs private label, 2017-21
- **Asda takes the lead in 2021**  
Figure 25: NPD from Asda and Aldi in bread, 2021
- **Amazon enters the bread market with 'The Baker' range**  
Figure 26: NPD from Amazon in bread, 2021
- **Restaurant brand TGI Fridays expands into retail**  
Figure 27: TGI Fridays enters bread market, 2021
- **Hovis goes upmarket with 1886 range**  
Figure 28: Hovis launches its Bakers Since 1886 range, 2021
- **Warburtons and Old El Paso target convenience with pittas/tortillas**  
Figure 29: NPD from Warburtons and Old El Paso, 2020-21  
Figure 30: Warburtons revamps gluten-free packaging, 2021
- **NPD looks to tap into interest in health**
- **Immunity support is highlighted as a selling point**  
Figure 31: Bread brands look to harness interest in immunity support, 2020-21
- **Modern Baker taps into interest in immunity and seeds**
- **Other brands look to harness interest in seeded variants**
- **Roberts unveils low-calorie seeded bloomer**
- **Kingsmill launches two new 50/50 seeded loaves**  
Figure 32: Kingsmill unveils 50/50 No Bits Multi-Seed bread, 2021
- **Genius puts gut health front and centre**  
Figure 33: Genius unveils gut lovin' range, 2021
- **Bürgen looks to push plant associations**
- **Premier launches low-fat naan bread**  
Figure 34: Sharwood's unveils low-fat mini naans, 2020
- **Sourdough trend continues**

## 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.

## Buy this report now

Visit [store.mintel.com](https://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.

- **Geary's Bakery launches Breads of the Worlds' Jason's breads**  
Figure 35: NPD in sourdough from Geary's Bakery, 2021
- **New York Bakery branches into sourdough with Deli range**  
Figure 36: New York Bakery debuts Deli range, 2020
- **Environmental claims increase driven by increased consumer interest**
- **Tesco launches recycling points for bread bags**
- **Bertinet Bakery looks to challenge perceptions that sourdough doesn't last long**
- **M&S extends frozen bread initiative to tackle food waste**

#### ADVERTISING AND MARKETING ACTIVITY

- **Advertisers step up spend in 2021 after severe cutbacks in 2020**  
Figure 37: Total above-the-line, online display and direct mail advertising expenditure on bread, by media type, 2019-21
- **Warburtons continues to lead spend**  
Figure 38: Total above-the-line, online display and direct mail advertising expenditure on bread, by top advertisers, 2019-21 (sorted by 2021)
- **New York Bakery pushes authenticity with New York or Nothin' campaign**
- **Hovis supports 1886 sub-brand following cutbacks**
- **Allied continues support of Kingsmill 50/50...**
- **...and invests in supporting Allinson's**
- **Old El Paso advertises mess-free Mexican meals with Tortilla Pockets**
- **Nielsen Ad Intel coverage**

#### BRAND RESEARCH

- **Brand map**  
Figure 39: Attitudes towards and usage of selected brands, 2021
- **Key brand metrics**  
Figure 40: Key metrics for selected brands, 2021
- **Brand attitudes: Warburtons leads on trust; Hovis on caring for health/wellbeing**  
Figure 41: Attitudes, by brand, 2021
- **Brand personality: New York Bakery Co is seen to be the most fun**

#### 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.

#### Buy this report now

Visit [store.mintel.com](https://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, 2021

- **Hovis leads on tradition; New York Bakery Co for being special**

Figure 43: Brand personality – micro image, 2021

- **Brand analysis**
- **Warburtons is seen to be the most trustworthy brand, offering good value**

Figure 44: User profile of Warburtons, 2021

- **New York Bakery Co stands out for being special, indulgent and cool**

Figure 45: User profile of New York Bakery Co, 2021

- **Hovis is seen to be the most traditional**

Figure 46: User profile of Hovis, 2021

- **Roberts Bakery struggles to stand out**

Figure 47: User profile of Roberts Bakery, 2021

- **Kingsmill's position as a family brand driven by its 50/50 range**

Figure 48: User profile of Kingsmill, 2021

- **Reading word clouds**

#### THE CONSUMER – KEY TAKEAWAYS

- **COVID-19 marks a step-change in working habits**
- **Britishness stands out**
- **Bread makers should capitalise on willingness to pay more for environmentally friendly packaging**
- **Health concerns prompt people to cut back on bread**
- **Opportunities to push emotional benefits of bread**

#### IMPACT OF COVID-19 ON CONSUMER BEHAVIOUR

- **COVID-19 marks a step-change in working habits...**
- **...driving more food and drink occasions at home**
- **Online shopping boosted by COVID-19**
- **Consumers look to support local businesses**
- **Health becomes more of a priority in the wake of the pandemic**
- **Sustainability rises on consumers' radars**
- **One in four say environment is a higher priority**
- **Consumers look to crack down on waste**

#### PURCHASING AND USAGE OF BREAD

- **97% buy bread; packaged sliced loaves remain the most popular**

Figure 49: Types of bread and bread products bought in the last month, 2020 and 2021

#### 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.

#### Buy this report now

Visit [store.mintel.com](https://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.

- White loaves remain the most popular**

Figure 50: Types of packaged sliced loaves/unsliced bloomer/loaves bought in the last month, 2021

### FREQUENCY OF EATING BREAD

- 44% eat packaged sliced bread and 16% other types of bread daily**

Figure 51: Frequency of eating bread in the past month, 2021

### INTEREST IN BREAD CONCEPTS

- Britishness stands out**

Figure 52: Interest in bread concepts, 2021

Figure 53: Sainsbury's highlights its use of British wheat flour on front of pack, 2021

Figure 54: NPD from Hovis and Aldi with reference to Britishness/being baked in Britain, 2018 and 2021

- Offering a longer shelf life would speak to consumer concerns on waste**

Figure 55: Warburtons communicates suitability for home freezing on-pack, 2021

- Investing in sustainable ingredients appeals to 30%**

### BEHAVIOURS RELATED TO BREAD

- Health concerns prompt people to cut back on bread**

Figure 56: Behaviours related to bread, 2021

- Minority interest in added nutritional benefits**

- Calling out positive nutrition would appeal to those scrutinising ingredients**

- Push carrier role of bread as a way to explore flavours**

- Bread makers should capitalise on willingness to pay more for environmentally friendly packaging**

- A rating system could aid consumers in their choices**

### ATTITUDES TOWARDS BREAD

- Opportunities to push emotional benefits of bread**

Figure 57: Attitudes towards bread, 2021

- Brand extensions into ISB pose another route to growth...**

- ...as well as bake-at-home bread**

### APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- Abbreviations**

- Consumer research methodology**

### 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.

### Buy this report now

Visit [store.mintel.com](https://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.

### APPENDIX – CENTRAL FORECAST METHODOLOGY

- Market forecast and prediction intervals**

Figure 58: Market forecast and prediction intervals for UK value sales of bread, 2021-26

Figure 59: Market forecast and prediction intervals for UK volume sales of bread, 2021-26

- Market drivers and assumptions**

Figure 60: Key drivers affecting Mintel's market forecast, 2020-25

- Forecast methodology**

### APPENDIX – COVID SCENARIO PERFORMANCE METHODOLOGY AND ASSUMPTIONS

- Scenario performance**

Figure 61: Scenario performance for value retail sales of bread, 2016-26

Figure 62: Scenario performance for volume retail sales of bread, 2016-26

- Rapid COVID recovery, central and extended COVID disruption scenarios outline**

- Scenario methodology**

### APPENDIX – MARKET SHARE

Figure 63: Leading manufacturers in the UK prepacked bread retail market, by value and volume, 2018/19-2020/21

Figure 64: Leading manufacturers in the UK speciality bread and rolls retail market, by value, 2018/19-2020/21

### APPENDIX – LAUNCH ACTIVITY AND INNOVATION

Figure 65: New product launches in the UK bread market, by company, 2017-21 (sorted by 2020)

Figure 66: New product launches featuring the word sourdough, 2015-21

Figure 67: New product launches in the bread market, by claim, 2017-21

Figure 68: New product launches featuring seeds as an ingredient, 2015-21

Figure 69: New product launches in bread featuring the low/no/reduced calorie or fat claims, 2017-21

Figure 70: New product launches in the bread market, by claim category, 2017-21

### 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.

### Buy this report now

Visit [store.mintel.com](https://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.

## APPENDIX – ADVERTISING AND MARKETING ACTIVITY

Figure 71: Total above-the-line, online display and direct mail advertising expenditure on bread, by top brands, 2019-21 (sorted by 2021)

### 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.

### Buy this report now

Visit [store.mintel.com](https://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](https://www.mintel.com)**.