

The Grocer

Focus On: Savoury pastries & meat snacks by Emma Sturgess (emma-sturgess@hotmail.co.uk)

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The Story

Brits might not be eating more pies (volume sales are flat) but they are prepared to splash out for the ones they buy, with value added to the category over the past year. So, where has this growth come from? And, what can brands and retailers do to encourage Brits to eat more pies and drive volume growth? Can they learn anything from the booming meat snacks sector, which has seen continued value and volume growth? What's driving that growth anyway?

Key Themes

Pies: Chilled pies are up in value but volume remains flat (still that's an improvement on last year when volume was down. Both branded and own label players are in value growth but the latter is in decline on volume. Why? Within this category, there has been strong growth of lamb and other meat pies, while last year's success mixed meat pies are in sharp decline. What other meats are proving to be successful? Branded pork pie sales have fallen off a cliff. Why is this?

Meat snacks: The sector continues to go from strength to strength, with value and volume in growth, adding £8.5m to the category in the past year. Strong growth has been seen from chorizo, chicken and jerky – are there any new branded players/variants to note? What else has been happening here? Is the growth of meat snacks being driven by high protein diets?

Brands: How are the category's brands performing? Speak to the brands about their performance, what's changed and how they are hoping to improve on this over the next year.

Own label: Own label dominates in chilled pies securing further value growth (although volume is down). What's driving this growth? Are retailers rolling out more premium offerings? Promoting less? In meat snacks, on the other hand, branded players dominate. Are retailers looking to increase their own label offerings in this area? Which sub-sectors are they having particular success with?

On-the-go: How are meat snack and pie brands tapping into the on-the-go market? Are retailers dedicating more space to them in the on-the-go aisles/convenience stores?

Retailers: Within chilled pies, M&S and Waitrose have seen some of the strongest growth, while the likes of Morrisons, The Co-op and Asda are in decline. How come? How have the retailers' ranges changed over the past year? Iceland has also seen reasonable growth in the market. The discounters are also doing well in pies as well as meat snacks. What's their strategy in this category? The independents & symbols, however, are suffering. Will they be doing more to tap into lunchtime and snacking occasions?

Advertising and marketing: This feature will also investigate how the marketing and advertising strategies of the category's biggest players have evolved over the past year and how they will develop in the coming year to sustain growth or return brands to growth. Have meat snacking companies been investing heavily to drive growth in this sector? What about pie producers?

Innovation: Key to this feature will be a discussion of the latest NPD from the category's brands and own label players, large and small. The feature will explore the market trends that have inspired these innovations and weigh up which new launches are most likely to encourage new trends in the market. We will profile 8 of the most interesting new launches in a separate innovation panel.

Jerky: Value sales of jerky are up over 50% taking the sub-category to £6m. So, what's behind this growth? Is it driven by low-carb/high-protein diets? One brand claimed a first with pork jerky earlier this year. Are others taking different meats into the format? What new variants have hit the market?

Free from pies: Brands have entered the gluten free pies & pastries market. So, how are they performing? Is it difficult to make gluten free pastry? What potential is there in this market? Are retailers eyeing this up as a potential market for own label growth? M&S has a big range of free from pastries – are there savoury ones within this?

Key questions the feature is likely to address:

- What consumer trends have impacted the category over the past year?
- How have promotional strategies (both in terms of price and marketing) evolved?
- How have individual retailers' strategies impacted the market?
- How has merchandising changed in the market?
- What impact has own-label had on branded players?
- What's next for the category?
- We profile four new products or product ranges that have ideally not appeared in The Grocer before, including launch date and RSP.