The Grocer

Top Products 2016

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The Grocer's Top Products Report is a must-have reference tool for anyone in UK fmcg. In partnership with Nielsen, this year's report will crunch the numbers on 48 categories to reveal the winners and losers of the grocery price war.

As we anticipate what life will be like post-Brexit, this year's report will pay close attention to the likely impact of the weakening pound on production costs and retail prices. Packed with sales figures for more than 100 subcategories, a rundown of the most successful new launches and ad campaigns of the year and expert interviews with retailers and brand owners, this year's report will include a wealth of multimedia digital content, including films and members-only content.

For editorial enquiries please contact the writer for the relevant category report (see below). Editorial project manager is rob.brown@thegrocer.co.uk.

Categories - A to Z

1. **Alcoholic drinks: Beer & cider by Lisa Riley lisa.riley@thegrocer.co.uk**

Roll out the barrel! Beer has had a blinder of a year, with supermarket sales of ale, stout and lager all on the up. What's more, value is growing ahead of volume as drinkers are convinced to pay more for their brews by innovative craft brands and premium bottled ales. It's a different story in cider, however with value and volume in decline. So who have been the winners and losers of the past year in beer and cider? How are mainstream brands faring? Why?

2. **Alcoholic drinks: Spirits & RTDs by Lisa Riley lisa.riley@thegrocer.co.uk**

Growth in spirits is slowing. Value sales are still up, but at less than half the rate of a year ago. Crucially, volumes are up ahead of value, suggesting that lower prices are becoming a key way of keeping drinkers on the hard stuff. Does this mean the craft spirits trend is coming to an end? Or is this sign of a polarisation between standard and premium spirits? Who have been the winners and losers of the past year? And what's behind the mixed performances in RTDs?

3. **Alcoholic drinks: Wine by Lisa Riley lisa.riley@thegrocer.co.uk**

Crack open the bubbly! Sparkling wine continue to grow at an astonishing rate. Now there's evidence that drinkers are trading up from Prosecco and Cava to the expensive stuff; the supermarkets have sold an extra half a million bottle of champagne in the past year. What's driving this growth? Why have sales of still wine fallen flat? Who have been the winners and losers in wine in the past year? What factors are at play? How are prices changing? And, given that own label is driving most growth in wine, why are brands weak in this category?

4. **Baby & Infant care by James Halliwell james.halliwell@thegrocer.co.uk**

There's a boom going on in baby snacking right now. Why? Which products and retailers are driving this growth? And why has the baby milk formula market gone from being in strong growth a year ago to steep decline now? Which players have been hit hardest and who's weathering the storm? And who are the winners and losers in the generally flat baby food market? Can anything be done to resurrect the baby juice sector?

5. **Bagged snacks by Beth Gault Beth.Gault@thegrocer.co.uk**

Volumes are flat and value is down in bagged snacks. But scratch the surface and you'll find pockets of rapid growth and crumbling decline. So which brands and sub sectors are up, and which are down? The data shows steep falls in average price for many of the market's fastest growers; are players sacrificing value to maintain volume growth? How are promotions and formats evolving? Is the sharing trend still in full swing?

6. **Batteries by Ellis Hawthorne Ellis.hawthorne@thegrocer.co.uk**

Volumes are fading faster than value in batteries, suggesting sales in the supermarkets are suffering as a result of growing competition from the discount channel. Who have been the winners and losers in the past year? With only one of the top five brands in growth – and with value up ahead of volume for that player – what's the recipe for success in this market?

7. **Biscuits by Amy North amy.north@thegrocer.co.uk**

There are two competing key trends shaping the biscuits category right now: health and indulgence. While the growth of savoury biscuits, driven to some extent by brands positioning themselves as a healthier alternative crisps, has faltered in the past year, cereal bars are booming as wholefood brands leap up the bestsellers lists. In sweet biscuits, the established giants are seeing their share crumble as a certain US brand flexes its muscles. So who are the winners and losers of this dynamic market? To what extent is growth and decline being driven by lower prices, NPD, marketing investment and range rationalisation?

8. **Bread by Daniel Selwood daniel.selwood@thegrocer.co.uk**

As the retailers have continued to pile bread high and sell it cheap, just two of the top 10 brands are in growth. How have they managed this? Who have suffered the most in the past year? Why? What are the biggest players doing to turn things around?

9. **Cake by Emma Weinbren emma.weinbren@thegrocer.co.uk**

The solid growth in cakes that we reported a year ago has stalled, with volumes falling by more than 3% as value's dipped at a lower rate. Delve a little deeper and there are areas of strong growth – own label, for example, is out performing branded players. A number of brands are enjoying strong growth, with value up ahead of value. What's driving this? How important are on the go formats to the sector's movers and shakers? Who's won? Who's lost? Why?

10. **Canned food by Kevin White kevin.white@thegrocer.co.uk**

Canned food continues to go through the wringer, with all the major categories in decline. Yet, there are pockets of growth. What are these? And what's driving growth? Who have been the biggest losers of the past year? What are they doing to turn things around?

11. **Cereals by Daniel Selwood daniel.selwood@thegrocer.co.uk**

Cereals continue to go through the mill as breakfast consumption habits change and the retailers pile increasingly higher and sell even more cheaply. What are brands doing to resurrect growth? And what's the secret to the success of the handful of players that are in growth?

12. **Confectionery: Chocolate by Beth Gault Beth.Gault@thegrocer.co.uk**

Value is flat for chocolate; volumes have dipped. But beneath the headline figures there's monumental changes taking place as the way Brits consume chocolate evolves and the war on sugar rumbles on. So who have been the winners and losers of the past year in chocolate? What factors – pricing, format changes, NPD, range rationalisation and so on – are affecting the market?

13. **Confectionery: Sugar by Beth Gault Beth.Gault@thegrocer.co.uk**

Sugar confectionery isn't looking too sweet right now and gum has come unstuck. Why? Who have been the winners and losers of the market in the past year and what factors have impacted their performances?

14. **Cosmetics by Beth Gault Beth.Gault@thegrocer.co.uk**

Supermarket sales of cosmetics are in fine fettle, with value having surged by more than £64m in the past year. What's more, this is being driven by rising prices. So which retailers are driving this growth? And who have been the winners of the growing attention the supermarkets are paying the sector? Is anyone losing out?

15. **Dairy: Butters & spreads by Kevin White kevin.white@thegrocer.co.uk**

Butter and spreads' sales slide has accelerated in the past year. A year ago, brands were losing share to own label; this time around brands' rate of decline is slower than own label. Why? This doesn't mean brands are out of the woods, of course with only three of the top 10 brands in growth. Is growth all down to price cuts or is something else at play?

16. **Dairy: Cheese by Nick Hughes nickjhughes@hotmail.co.uk**

Own label cheese has lost share to brands in the past year with the rate of value loss more than twice that of brands. What's going on? How have brands managed to drive a 0.5% hike in volumes? Is it all down to price or are other factors at play? Who have been the biggest winners and losers?

17. **Dairy: Drinks by Daniel Selwood Daniel.selwood@thegrocer.co.uk**

Half of milk's top 10 brands are in growth (last year, just one was) and brands are stealing share from own label. What's going on? Is it all down to free-from variants or are certain consumers finally being convinced that the right sort of milk is worth paying more for? What's driving the solid growth in flavoured milk and drinking yoghurt and who's cashing in?

18. **Dairy: Yoghurts & desserts by Kevin White kevin.white@thegrocer.co.uk**

The yoghurt category has continued to struggled in the past year, but there are solid performances to be found. What's driven the growth and losses of the category's biggest players? How are trends such as convenience, luxury and the backlash against sugar playing out?

19. **Free from by Beth Gault beth.gault@thegrocer.co.uk**

The Free from category's growth has passed the £100m mark in the past year. Who have been the biggest winners in the past year? How has the way the category is merchandised, promoted and managed by retailers changed in the past year? How much growth is left in the market? And where will it come from?

20. **Fresh: Fruit & veg by Carina Perkins carina.perkins@thegrocer.co.uk**

Fresh fruit & veg remains a key battleground in the price war. The average price of veg has continued to plummet, as the multiples have used the promise of cheaper spuds, mushrooms, peppers and so on to lure shoppers back from the discounters. In fruit things aren't so cut and dried: average prices have risen, partly as a result of growth in more expensive exotic fruits, while the price of staples such as grapes and bananas have continued to fall. So what's going on? Are suppliers getting squeezed? How are falling prices being funded?

21. **Fresh: Meat, fish & poultry by Carina Perkins carina.perkins@thegrocer.co.uk**

This is an age of cheap meat. And it's getting cheaper. Why? Can suppliers continue to support the falling price of meat products in the supermarkets? And what's going on with fish?

22. **Frozen food by Amy North amy.north@thegrocer.co.uk**

Prices are up in all but one of the five frozen food categories we're covering in this year's Top Products. How has the frozen food sector managed to defy the deflation we've seen elsewhere? And which players have driven this? How is own label faring in the five sectors? Why?

23. Hot beverages by Amy North amy.north@thegrocer.co.uk

Roast & ground coffee is steaming ahead. Who have been the winners and losers of the hot beverages market in the past year? Is anyone bucking the general pattern? How are they doing this? And how is the weakness of the pound impacting the hot beverages market's prospects?

24. Household goods by Alec Mattinson alec.mattinson@thegrocer.co.uk

Value is leaking from the household category as average prices fall from four of the five cleaning sectors we're covering in this year's report. What's driving overall prices down? What role is the growth of bargains stores and discounters having in all this? Why are prices (and value and volume sales) rising in aircare?

25. Ice cream by Megan Tatum megan.tatum@thegrocer.co.uk

Brits have been convinced that ice cream is worth paying more for in the past year. How? Why is tubbed ice cream outgrowing handheld? And who have been the winners and losers in this category over the past year?

26. Jams & spreads by Megan Tatum megan.tatum@thegrocer.co.uk

Is it time to rethink the term 'spread'? We ask because it's becoming clear that products that began life as something intended to be on bread are now being consumed in different ways (sales of bread are in steep decline, yet spreads are in solid growth). So who's driving this growth and who's being left behind? And why is jams & spreads in decline?

27. **Laundry by Carolyn Robertson Carolyn.robertson@thegrocer.co.uk**

Are the multiples being forced to lower prices to compete with the bargain stores and discounters? Who have been the winners and losers of the past year and what's driven success; NPD, marketing or just lower prices?

28. **Oils by Edward Devlin edward.devlin@thegrocer.co.uk**

The slide in sales of cooking oils has come to a halt in the past year, with value and volume up, partly thanks to a rise in average prices. What's driven this? Who have been the biggest beneficiaries and has any one lost ground? With the pound weakened by the Brexit vote, what does the coming year hold for cooking oils?

29. **Over the counter by Carolyn Robertson Carolyn.robertson@thegrocer.co.uk**

Over the counter remedies appear to be in rude health, despite a disappointing year for cold & flu remedies. Why is this? Who have been the winners and losers of the past year and which sub sectors are growing the strongest?

30. **Paper products by Emma Weinbren emma.weinbren@thegrocer.co.uk**

Value is being eroded in all four of the paper products categories – toilet paper, nappies, facial and kitchen tissues – as lower prices are used to drive volume growth. Who's driven the most growth? How? Is it all down to lower prices or are NPD, marketing and so on paying off? Who's been wiped out? How has the dynamic between own label and brands evolved in the past year?

31. **Personal care: grooming by Alec Mattinson alec.mattinson@thegrocer.co.uk**

How important have low prices become in the category? Is this proof of growing competition between the supermarkets, the high street pharmacists, the pound stores and discounters? Who have been the winners and losers?

32. **Personal care: haircare by Alec Mattinson alec.mattinson@thegrocer.co.uk**

Value and volume is down in styling, shampoo and conditioners. Why? Who has been hardest hit by the downturn? Has anyone emerged unruffled? To what extent is the decline being driven by growing competition between the supermarkets, the high street pharmacists, the pound stores and discounters?

33. **Personal care: male grooming by Alec Mattinson alec.mattinson@thegrocer.co.uk**

Who have been the winners and losers of the past year in male grooming? With value and volume down in razors and men's toiletries and volumes being driven by lower prices in skincare, what does the coming year hold for the sector?

34. **Personal care: oral care by Alec Mattinson alec.mattinson@thegrocer.co.uk**

Players in oral care have had plenty to smile about in the past year. All three of the category's sectors are in value growth, driven primarily by higher prices? Who and what is driving this? And is anyone being left behind?

35. **Petcare by Ellis Hawthorne ellis.hawthorne@thegrocer.co.uk**

Volumes are falling faster than value in pet care as shoppers plump for posher foods for their beloved pets. Which brands and retailers are driving this? And who's being left behind?

36. **Ready meals by Ellis Hawthorne ellis.hawthorne@thegrocer.co.uk**

Chilled ready meals are in solid value and volume growth, while rising prices in frozen appear to have contributed to a sharp fall in volumes. Ambient, meanwhile is in value and volume decline, though it's worth noting that volume is falling and a far more rapid rate than value. What's going on? Is this proof that ready meals are becoming more premium? Who are the winners and losers?

37. **Rice, noodles & pasta by Edward Devlin edward.devlin@thegrocer.co.uk**

Volumes are up in rice, noodles and pasta. To what extent has this been driven by lower average prices? And who have been the winners and losers of this category?

38. **Sauces: Cooking by James Halliwell james.halliwell@thegrocer.co.uk**

Value and volume decline for cooking sauces in the past year. To what extent has this been driven by the advice that we shouldn't consume certain brands' products more than once a week? Who's lost the most? And is anyone in growth?

39. **Sauces: Table by Megan Tatum megan.tatum@thegrocer.co.uk**

To what extent are the tables sauces and condiments categories being altered by changes in the types of food & drink Britain is buying? How are the old classics such as ketchup and mayonnaise faring? Who have been the winners and losers of the past year?

40. **Savoury pastries & meat snacks by Natalie Brown natalie_brown@live.co.uk**

Biltong and jerky are booming and savoury pastries aren't in bad shape either. What's driving this? Who's fuelling the growth and is anyone being left behind? Why?

41. **Sexcare by Daniel Selwood by Daniel.selwood@thegrocer.co.uk**

All three of the sexcare sub sectors are in growth. Why? Who's winning and losing? And to what extent is market performance being driven by changes in price?

42. **Soft drinks: Bottled water, squashes, cordials by Natalie Brown natalie_brown@live.co.uk**

Bottled water continues to boom as the decline of squashes and cordials' decline carries on. Why? Who have been the winners and loser of the past year? And with four of the world's biggest food and drinks companies fighting over bottled water, who have had the biggest gains and losses in market share?

43. **Soft drinks: Carbonates by Natalie Brown natalie_brown@live.co.uk**

As carbonates lose their fizz, sports and energy drinks continue to grow. Why? Who's winning and losing in these categories? And what role are low and no sugar products playing?

44. **Soft drinks: Juices & smoothies by Natalie Brown** natalie_brown@live.co.uk

As juices and smoothies continue to decline at category level, certain players in the bestsellers list are in strong growth. How come? And who's lost the most? To what extent are brands managing to grow by playing the health card with lower sugar, vegetable and coconut products?

45. **Soup by by Amy North** amy.north@thegrocer.co.uk

Soup is struggling, with both ambient and chilled in value decline. Nevertheless, the past year has seen some strong performances from many of the sector's biggest players. Who? How are they bucking the downward trend? And who's struggling?

46. **Sports nutrition by Natalie Brown** natalie_brown@live.co.uk

Sports nutrition is in rude health. Which players, formats and retailers are driving this and how? Is anyone being left behind?

47. **Tobacco: Cigarettes, RYO & accessories by Ronan Hegarty** ronan.hegarty@thegrocer.co.uk

Rolling tobacco continues to steal share from tailormades. Why? What have tobacco's movers and shakers been doing as a last gasp to attract smokers to their brands before the imposition of plain packs? Who's been most successful and how? Who's lost the most ground? Why?

48. **Tobacco: E-cigs by Ronan Hegarty** ronan.hegarty@thegrocer.co.uk

Has the e-cigs market managed to make the most of the continuing difficulties the tobacco market faces? How? Who have been the biggest winners and losers of the past year? And what of the conventional nicotine replacement treatment market?