The Grocer

Focus On: free from by Sonya Hook (sonyahook@gmail.com)

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The Story

- **Almost 60% of UK households now buy free-from products, despite a much lower proportion of consumers suffering from a food-related condition or intolerance, according to research for The Grocer. So why does this market continue to be one of the fastest growing grocery sectors, having grown a staggering £97m in the past year? Which sub sectors, brands and retailers are driving this growth and how? And how long can such growth continue, given that it appears to be partly driven by a consumer trend (or fad?) rather than medical need?**

Key themes:

Price and promotions: As prices fall in nearly all other grocery sectors, they're on the rise in free from. Why? This feature will explore how reliant brands are on promotions for growth in this sector, with particular attention being paid to the level of volume sold on deal in the past year, mechanics used and how this compares to increasingly promotion reliant categories elsewhere. As the market becomes more crowded, will deals become more important?

Own label v brands: Branded and own label growth in free from is pretty much neck and neck, according to our analysis. This feature will explore in detail which retailers are driving the growth in own label free from and how brands are looking to compete. How is the dynamic between own label and brands likely to change over the course of the coming year?

Merchandising: Increasingly, free from food is breaking out from the confines of specific, niche fixtures and finding a place alongside mainstream products. This feature will explore which retailers are most progressive in this regard and how great the rewards have been. How could retailers further improve the way free from products are merchandised?

Convenience: That some gluten free bread brands are now moving into convenience is proof of just how far the sector has come. This feature will explore how well such brands are doing in convenience and how great the channel's potential is. Will gluten-free bread have the rate of sale needed to justify a slice of convenience retailers' limited shelf space? Should gluten free bread brands increase their shelf life to lessen the risk involved?

Innovation: This will be key to this feature. We will be investigating how new product development has shaped the category over the past year and what is in store for shoppers in 2015. We will be profiling four of the most interesting launches in a separate innovation panel.

Advertising and marketing: This feature will also investigate how the marketing and advertising strategies of the category's biggest brands have evolved over the past year and how they will develop in the coming year to sustain growth or return brands to growth.

Box-outs:
4 x gluten/wheat-free innovations: Four new products or product ranges that have not appeared in The Grocer before, including launch date and RSP, and a hi-res picture of each.

4 x lactose/dairy-free innovations: Four new products or product ranges that have not appeared in The Grocer before, including launch date and RSP, and a hi-res picture of each.

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?