

# Cheese



- Proud to be the nation's favourite cheese brand
- Bought by 42% of UK households\*

Our Make  
it Better  
Cheddar



\*Kantar WorldPanel 52 w/e 24th December 2022

Saputo Dairy UK

# Momentous year for Saputo

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**Cathedral City**  
**Cheddar & Plant Based**  
**alternative to Cheddar**  
**Davidstow Cheddar**

Despite an increasingly challenging environment, Cathedral City proudly remains the UK's No.1 cheddar brand, valued at £285.7m<sup>1</sup>. Voted as the top chilled/frozen food brand in YouGov's BrandIndex<sup>2</sup>, the brand has had a momentous year: launching a new brand identity and packaging design; moving to side-open packaging on its block range; launching a new TV campaign; and introducing several new product innovations, including a Cathedral City plant-based range.

Richard Williams, vice president of the cheese business unit, comments: "This has been an historic year for Cathedral City. We've worked hard to continue to offer our consumers consistently great quality and value, while continuing to adapt our portfolio to their evolving needs.

"Our new campaign, 'Our Make it Better Cheddar', launched last summer and won The Grocer's top campaign for dairy cheese in 2022," he adds. "The campaign showcases the passion and commitment that goes into making every pack of our cheese and the delicious taste Cathedral City is known for. We have further brought this to life through our modernised brand identity and packaging design, which helps consumers better navigate our portfolio.

"Our new block side-open formats increase convenience, allowing consumers to cut their cheese straight from the pack, while retaining the resealability function for freshness."

**NPD launches**

It has also been a bumper year for new product launches, notes Williams. "We expanded our Lighter range with Our Lighter Extra Mature block and launched Our Plant Based range. Years in the making, the launch of Our Plant Based capitalises on the flexitarian demand for great-tasting plant-based alternatives and has been hailed as game-changing by consumers for its quality, texture and meltability<sup>3</sup>. As consumers continuously seek in-home indulgence, we also launched our flavoured blended wedges.



**"This has been an historic year for Cathedral City. We continue to offer our consumers consistently great quality and value, while adapting our portfolio to their evolving needs"**



"Our focus on sustainability has seen us collect over 1.1 million units through our 'Cheese Packaging Recycling Programme'. We've also introduced recyclable packaging for Our Grated 180g and Plant Based ranges."

**Marketing campaigns for 2023**

Saputo Dairy UK will continue to drive its proposition throughout 2023 with marketing activations that reinforce its consistent quality and taste, meeting consumers' varied needs, he adds.

"Our premium everyday Cornish cheddar brand, Davidstow, maintains its importance in our portfolio, as shoppers turn to versatile, high-quality ingredients to elevate in-home occasions," says Williams. "We will continue our hugely successful national sampling programme in 2023 and further develop our direct-to-consumer proposition, giving consumers access to unique formats, maturities and gifting options.

"As the UK's leading branded cheese manufacturer, we remain committed to driving category growth through our breadth of range, which addresses shopper needs for value, convenience, health and indulgence, all underpinned by taste," he concludes.

Source

<sup>1</sup> IRI S12G Outlet + Kantar Discounters & Bargain Stores, 52 w/e 24.12.22  
<sup>2</sup> YouGov BrandIndex, 02.11.22 to 01.02.23 vs 02.11.21 to 01.02.22  
<sup>3</sup> Feedback from Careline contacts and social media

\*Saputo Dairy UK is the trading name of Dairy Crest Limited

# Analysis



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## Analysis

# A cheese for all seasons

**While performance for the cheese category has been mixed, suppliers have their eyes on the key drivers of convenience and snacking as a way to ride out the current inflationary environment, creating NPD to suit these needs**



➔ An anonymous but quite astute observation that pops up regularly on Facebook reads: ‘You can’t make everyone happy. You’re not cheese’. Indeed, it is the sheer variety and breadth of cheese options that make the category so broadly popular; statistics reveal that 98% of UK households buys cheese, with the average Brit eating 30g a day<sup>1</sup>.

However, suppliers are agreed that continual NPD is vital to keep the category interesting and, importantly, evolve some cheeses beyond the traditional cheeseboard occasion. Now, with hybrid working, a challenging economic environment, and consumers more focused on at-home entertaining, the cheese category has a raft of opportunities to fulfil multiple consumer needs – and suppliers seem intent on catering to that demand.

Following the impact of the Covid pandemic, the market began to stabilise, but is now being hit by the economic situation, says Eurilait. “We are seeing the biggest inflation levels for decades. Food inflation continues to spiral and consumers are scaling back to save in all aspects of life. That said... consumers are looking for more at-home consumption opportunities.”

Rising costs and inflationary rates impacted cheese in 2022, making it a challenging year for the category, agrees Heloise Le Norcy-Trott, group marketing director for Lactalis UK & Ireland. “This, combined with consumers tightening their belts, resulted in a sluggish market, especially when compared with the two ‘lockdown years’, which saw sales of a variety of flavours and formats soar – largely down to consumers scratch-

cooking more during the pandemic.”

Branded cheese currently accounts for 42% of total cheese value sales, at £1.2bn per year<sup>2</sup>, she says. “Meanwhile, private label, which accounts for 58%, took £1.5bn in value sales in 2022<sup>3</sup>.”

Wyke Farms MD Rich Clothier says 2022 was a tough year for the cheese category post-pandemic. “Both value and volume for the total category were shown to be in decline as shoppers shifted back to emulate pre-Covid shopping habits, coupled with households feeling price pressure as FMCG inflation hit a record high of 12.4%.” He adds that, outside of the discounters, own-label has taken share from brands and, at a total market level, value own-label lines are growing faster in cash terms than the much larger premium own-label or brands.

Meanwhile, the cream cheese



**78%**

**of British consumers believe snacking should be part of a healthy diet<sup>9</sup>**

*YouGov, British Nutrition Foundation*

**£1.2bn**

**Branded cheese value sales, accounting for 42% of the total<sup>3</sup>**

*IRI*

**11.9%**

**Value growth of plant-based cheese in retail<sup>ii</sup>**

*IRI*

**7.9%**

**Growth in 'better for you' options over the last few months<sup>14</sup>**

*Nielsen, UK Scantrack data*

category, including cheese snacks, is continuing to grow by 2.3% year-on-year (YOY)<sup>4</sup>, suggesting that shoppers are still buying into the category despite the challenging economic circumstances of the past year, says Mondelez International trade communications manager Susan Nash. However, if shoppers are going to spend money on these products, they are looking for superior taste and quality – reflected in the fact that 67% of people would rather buy fewer amounts of their favourite snack brand than buy the less expensive generic alternative<sup>5</sup>.

In terms of general trends, total cheese is seeing a -5% volume decline in the market and, within that, blue cheese is tracking down further at -8%, says Long Clawson managing director Bill Mathieson. “Total cheese is seeing shoppers buying less volume,

less frequently, whereas total blue is losing shoppers overall.

“However, from a value position, Stilton is outperforming the total blue category, driving 6% value growth, which in turn is driving overall category growth up 2%<sup>7</sup>. This is partly driven by inflation... but can also be accredited to the launch of our 1912 brand into the category.”

Stilton is still under-represented on the fixture in British retailers and delis, adds Mathieson. “We identified an opportunity to create a distinctly branded, premium stilton to increase its visibility and encourage customers to take it off the cheeseboard and use it in different meal occasions.”

#### **On-the-go and convenience**

At Bel UK, the company has seen the demand for convenient grab-

and-go snacks continuing to rise, as a consistent return to office and school environments drives an on-the-go lifestyle. According to the company, 78% of British consumers believe snacking should be part of a healthy diet<sup>8</sup> and cheese benefits from its association as a great source of protein and calcium. “In fact, over the past five years, cheese has made the largest share gains in terms of consumers actively seeking to increase their protein consumption, despite a plethora of innovation within the protein category<sup>9</sup>,” it says. As such, its grab-and-go snacking formats – Babybel and The Laughing Cow – continue to perform well. Its Mini Babybel two-pack format, specifically designed for food-to-go has become Babybel’s second-fastest growing SKU, with 238% growth YOY<sup>10</sup>.

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“Consumers want easy, healthy snacking solutions, which support their macros and budget,” says Eatlean business unit director Barrie Saxby. “Our NPD team are certainly focused on convenience as a key development opportunity.”

Convenience is also a trend benefiting Lactalis, says Le Norcy-Trott, as consumers want quick and easy-to-use formats. “This is partly driven by consumers working in offices again, having more out-of-home lunches and having less spare time overall. Leerdammer, which joined the Lactalis Group portfolio in September 2021 is sold mainly in a sliced format.”

Nash at Mondelez says the company has certainly seen the on-the-go occasion recover since lockdowns were fully lifted, but notes that there are some pandemic trends which have stayed around longer-term too. “What’s important, therefore, is that retailers offer a full range of snacks in different formats to meet different shoppers’ needs – whether that’s at home or out and about,” she says. “Some shoppers are opting to make lunch at home to take with them on-the-go as a way of saving money.”

The company recently launched Dairylea Filled Crackers to its range, which she says scored the number one lunchbox concept<sup>11</sup> in testing among consumers, with 88% of respondents agreeing that this was a great brand fit to give families a tasty snack with their lunch or after school<sup>12</sup>.

Mathieson at Long Clawson says the company is in discussions with different retailers and foodservice partners to explore more on-the-go options to increase stilton into everyday on-the-go occasions. Last year, the company saw Sainsbury’s include its Long Clawson Stilton in its Taste the Difference Festive Ploughman’s and the success of this has made stilton a permanent feature in the retailer’s Ploughman’s sandwich.

### Snacking, portion control, health

When it comes to health, portion control is very much at the forefront of Bel UK’s focus to encourage responsible consumption and help consumers monitor their portion sizes, says the company. Each 20g serving of Babybel, contains 59 calories, it says, and it also offers lighter versions of its snacking



products. For The Laughing Cow, 65% of the total consumption comes from the Light range, which contains 25 calories per portion.

Snacking is a critical focus for Eatlean in 2023, reveals Saxby, with product reformating, a drive into retail listings and interesting NPD. “Our goal is to make healthy, easy, delicious alternatives as accessible as possible,” he says.

Meanwhile Eatlean MD George Heler says health is the cornerstone of the Eatlean brand. “Eatlean goes beyond being better for you nutritionally; we have spent years developing a product that also tastes great and is 100% natural. Consumers want simple convenient ways to ensure they secure their daily nutrition intake affordably. We want to be part of that solution through our ready meals and by working with food manufacturers using Eatlean as an ingredient”

Better for you options are seeing

a growth of 7.9% over the last few months<sup>13</sup> and, with many shoppers taking on health drives in the first few months of the year, these options are important for retailers to have on-shelf and ready, says Mondelez’s Nash. As well as offering Dairylea Light and Philadelphia Light options, all Philadelphia snack products are now under 100kcal per portion, she says. Pack formats can help consumers manage portion control, she notes, and Dairylea triangles are 33kcal, while many Dairylea snacking products, including the Dairylea Filled Crackers, have moved to under 100kcal. “This meant that, in 2021, Dairylea removed over 2 billion calories from its range.”

### Sustainability

Wyke Farms’ Clothier says that, other than price, sustainability and provenance are the biggest drivers of purchase in almost every market across the world now. The company produces

# Suppliers build hot eating opportunity

In February, Eatlean launched the new Eatlean Mac & Cheese in Asda. This contains 50% less fat than standard cheddar and is priced competitively against branded and own-label, reflecting the market trend for affordable nutrition, says business unit director Barrie Saxby. “Additionally, we are able to offer a healthier hot snacking solution with our Moments cheese bites.”

Eurilait reveals that on its hot eat cheese range, Alfresco, the company will be launching new Halloumi bites, which will be available in Sainsbury’s this April. “PR and social media activity will create

excitement around this new product, which can be eaten as part of a meal or shared with friends and family – perfect for cheese-lovers looking for quick and easy meal options, as well as vegetarians and flexitarians seeking inspiration for meat-free choices,” it says.

In January 2023, Lactalis announced an improved recipe and rebrand for its Seriously Cheesy Nuggets, now renamed Seriously Crispy Melts. The improved recipe is made with Scottish cheddar and mozzarella in a light, crispy rice coating, reveals Heloise Le Norcy-Trott, group marketing director for

Lactalis UK & Ireland. Cheese as a source of protein – with consumers seeking out cheese as a meat alternative – will continue to be a key trend across 2023, she says. “Innovations such as our Président Brie Bakes and Seriously Crispy Melts, designed to appeal to the flexitarian and vegetarian markets, represent a sub-category within the hot eating fixture, which was previously focused on indulgent products such as baking camembert and fondue.”

The company also plans to launch a number of consumer-driven new product developments this

year, which she says will “tap into trends impacting the category, including convenient formats, affordable luxuries, cheese being enjoyed as a cooking ingredient and cheese as a meat alternative”.

The Violife brand is thriving in the foodservice industry, says head of northern Europe Victoria Slater, with some of the UK’s most-loved chains, such as Pizza Hut Delivery, Burger King and Pret, recognising the need to feature plant-based offerings. “The breadth of our portfolio means we are able to offer consumers alternatives to all their favourite cheese products,” she says.

all of its own energy – both electricity and gas – from renewable sources and has footprinted all of its products from cradle to grave, including Scope 1, 2 and 3 emissions. In addition, he says, a good deal of its NPd has been focused around reducing environmental impact and articulating its quality offering. “Take for example our world’s first Ivy’s Reserve carbon-neutral cheddar. Producing more low-impact type cheeses will be a big focus of our NPd going forward.”

Last year, a commissioned life-cycle assessment study with Quantis highlighted that Violife’s 100% vegan alternatives to cheese have less than half of the climate impact and occupy two-thirds less land compared to the same amount of dairy cheese, says head of northern Europe Victoria Slater. “Sustainability is one key driver for people choosing to eat plant-based cheese,” she notes.

Recent sustainability moves at

Mondelez International include reducing the head space of its Dairylea Lunchables pack. “Although this may seem like a small change, by doing so, we’ve managed to reduce the number of trucks on the road, as we can fit more packs per lorry and use less cardboard to pack them. This move alone is saving 717 tonnes of CO<sub>2</sub> and 74 tonnes of cardboard a year,” says Nash.

Bel UK says it is ranked in the top 1% of dairy companies worldwide for sustainability by EcoVadis<sup>14</sup> and recently accelerated its carbon footprint reduction target to help limit to global warming to 1.5°C. “We believe responsibility and profitability are intrinsically linked and continue to work closely with food waste and food poverty charities, investing in causes that matter to our customers. With Boursin, the company recent evolved its partnership with 2018 Masterchef winner Kenny Tutt and UK charity FoodCycle for its ‘You create,

We Donate’ campaign, driving funding and awareness for the charity, which feeds the hungry and lonely in society using food which would otherwise go to waste, it notes.

Yet, with cutting costs being a top priority for consumers in 2023, Lactalis’ Le Norcy-Trott expects sustainability and provenance to take more of a back seat. “Lactalis continually looks to remove problematic plastics and reduce the amount of non-recyclable packaging it uses,” she says. Activity includes finding a solution to replace its current multi-layered barrier film with a recyclable mono film for both block and grated cheddar, providing the same high level of product protection and being fully recyclable through in-store collections, as well as adding post-consumer recycled content to its slices packaging.

Recently, a team at Lactalis’ Lubborn factory trialled and validated a solution to reduce plastic from 12 x 85g

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Capricorn goat's cheese. "This was done by removing the plastic tray and developing a shelf-ready solution to replace the plastic display and functionality without compromising on quality and cost," she says. "It is very challenging to develop a shelf-ready solution for soft mould cheese because the product needs to breathe and requires air holes in the outer case to allow air flow. At the same time, the box needs to be strong enough to hold the product on a pallet without crushing."

As a business, Long Clawson is proud of the fact that it knows the carbon footprint on its farms, says Mathieson. On average our farms produce 1.17kg of CO<sub>2</sub> for each kg of milk we produce. This is less than half the global average and we are under the UK average of 1.25kg<sup>15</sup>. We have mapped 100% of our farms' carbon footprint and have action plans for all on how we will continue to reduce our impact on the planet."

Eatlean brought in its first sustainability lead in-house last year, demonstrating its commitment in this area, says Heler. "Protecting the environment for the next generation is integral to our future success," he adds.

Cheese is reliant on retaining quality and freshness, notes Eatlean's Saxby. "Like everyone, we are striving to become more sustainable as a business, while ensuring we deliver the best possible product to the consumer." The company has reduced plastic packaging by 35% on some of its most popular products and, long-term, continues to work on moving to fully recyclable packaging at the earliest opportunity.

### Looking ahead

2023 is about redefining value, says Eatlean's Heler. "Yes, people want outright value for money, but they are also looking for brands that resonate with their personal values.

"Affordable nutrition is an absolute priority as people seek out added value and consider on-pack claims more closely. This is why we have developed a healthy Mac & Cheese, which competes with branded and own-label rivals. We want to see more fresh, locally produced and functional ingredients which boost physical health."

Due to economic challenges, Wyke Farms' Clothier points to a polarisation of wealth in the consumer base.



"Shoppers who are not subjected to higher mortgage rates or higher energy costs may actually have a larger disposable income. However, a big percentage of shoppers will be challenged by inflationary costs. So, the challenge for most manufacturers and retailers is how do you bridge the gap and evolve your offering to answer the needs to two distinctly different shopper bases." He notes that, in recession and lockdown times, consumers have also seen that dining at home can be an incredibly good value and enriching experience. "This home dining opportunity is an area that retailers and manufacturers can exploit to drive category growth," he says. "When offering category advice, we are always looking for parts of that Big Night In, as this could be a key battleground in winning consumers and adding value as we go forwards."

"In the face of the current economic circumstances, many consumers are

choosing to socialise more at home as a cost-efficient way of spending time together," says Mondelez's Nash. "Instead of going out to eat, they'll look for premium options that they can purchase to bring home and enjoy together."

In addition, following the pandemic, seven in 10 adults said they wanted to make more balanced choices<sup>16</sup> and we've seen this trend continue throughout the past year, she says.

Looking ahead, Eurilait believes there is an opportunity for its brands' performance to excel as customers continue to seek out unique and quality products. Meat-free meal options, the continued growth of flexitarian food habits and consumers seeking out attainable luxuries are all key trends that will drive growth, it says.

At Violife, Slater expects 2023 to see "the continued growth of the plant-based cheese category as more and more people opt to switch some



# Plant-based continues to grow

You know that a food sector has really arrived on the scene in the UK market when the BBC Good Food's online channel reviews the best-tasting brands in that sector for its readers. This is what happened with vegan cheese last year, as the media outlet offered a line-up of the 'best vegan cheese to buy at a glance'<sup>i</sup>.

Violife's Epic Mature Cheddar Flavour was one of the brands highlighted in the feature and head of northern Europe for Violife, Victoria Slater, points to strong value growth in retail for the plant-based cheese category over the past year, up 11.9%<sup>ii</sup>, she

says. "We expect this growth to continue into 2023, as more and more people make the decision to test and incorporate plant-based products into their daily life. Even though we are annualising the 'lockdown' years of 2020 and 2021, where retail footfall was unnaturally high, Violife continues on its growth trajectory with value up 4.4% in the latest four weeks<sup>iii</sup>."

Bel UK is pursuing its ambition to become 50% fruit and plant-based in the long-term, as the plant-based cheese alternatives category is now worth £174m<sup>iv</sup>, nearly a fifth of the dairy alternatives

category<sup>v</sup>, it says. The company points to the growing popularity of Veganuary 2023 driving the sector and, in particular, highlights an interview where Tesco tells the BBC that it has seen sales of vegan alternatives to cheese grow by nearly a third over the past year<sup>vi</sup>.

At the start of the year, the company launched Babybel Plant-Based, which it says already owns a 2.4% market share of the plant-based category with only a single SKU<sup>vii</sup> and the company claims the NPD has attracted 232,000 new shoppers<sup>viii</sup>.

At Mondelez International, trade

communications manager Susan Nash says plant-based alternatives have never been so important, with over 629,000 people participating in the Veganuary challenge last year<sup>ix</sup>. As such, the company responded by launching Philadelphia Plant-Based in 2022, which is now available across the market for the first time this year, following a strong performance throughout last year, she notes.

"The range has over-indexed versus the category, particularly for under-34s, pre-families and young families<sup>x</sup>," she reveals.

or all of their dairy cheese for plant-based alternatives because of the many benefits it offers". She notes that innovation and renovation are critical for Violife and 2023 will be no exception to this trend, with lots of "exciting news" in the coming months.

"We'd love to see consumers buying more British cheese and explore enjoying cheese outside of just the cheeseboard occasion," says Long Clawson's Mathieson. "Over 60% of consumers currently use cheese in cooking<sup>xvii</sup> and, by finding recipes that use stilton, they can make everyday meals that little bit more special."

Following record-breaking grocery and cheese retail sales in 2020 and 21, consumers have now returned to some of their old habits, says Lactalis' Le Norcy-Trott. "Therefore, understanding what drives shoppers to purchase is vital for brands and retailers to maximise key sales. Among key trends she identifies for the category

across 2023 are inflationary pressure, innovation, premiumisation and convenience. "When consumers face higher prices they tend to cope by switching down to cheaper products, switching retailers, buying more on promotion or simply buying fewer items," she says. "Innovation covering a wide range of needs – convenience, health, indulgence – is known to drive price premiums, which consumers are willing to pay."

As time-pressed consumers return to their places of work, they will be willing to pay a premium for products that save them time and effort, she adds. "This is evidenced by the rapid growth of sliced (+8%<sup>xviii</sup>) and grated (+11%<sup>xix</sup>) cheese, offering convenience and ease, well ahead of total prepacked (+1.5%<sup>xx</sup>) and block (+4.5%<sup>xxi</sup>) cheese.

"The recent months have proven to be uncertain and unpredictable," she concludes. "With 2023 looking commercially challenging, we expect

many brands to approach NPD with caution. Despite this, with cheese being a household staple, it's important the industry continues to adapt, expand and innovate their offering in the coming months to ensure they cater to changing consumer tastes."

## Sources

<sup>1</sup> <https://tinyurl.com/ythtffk5>

<sup>2a3</sup> Lactalis – check source

<sup>4</sup> Nielsen UK Scantrack Data, Total Coverage, Value Sales YTD period, w/e 03.12.22

<sup>5</sup> Global State of Snacking 2022 Report, <https://tinyurl.com/yky2zvez>

<sup>6a7</sup> Kantar Worldpanel, Cheese Purchase Data, 52 w/e 25.12.22

<sup>8</sup> YouGov, British Nutrition Foundation's Healthy Eating Week Research

<sup>9</sup> Kantar, 5 y/e 04.09.22

<sup>10</sup> IRI, Total Grocery, 52 w/e 10.09.22

<sup>11a12</sup> Nielsen, Idea Screener, March 2019 \*sample n=244 consumers

<sup>13</sup> Nielsen, UK Scantrack data, Total Coverage, Value Sales, Latest 12 w/e 03.12.22

<sup>14</sup> <https://tinyurl.com/yhdy7cyd>

<sup>15</sup> Map of Ag, annual base mapping of Long Clawson dairy

farms, 2021-22

<sup>16</sup> Gov.uk, <https://tinyurl.com/2s3mzhz8k>

<sup>17</sup> Mintel Cheese Report 2021

<sup>18-21</sup> IRI, Sliced, Grated, Processed and Everyday Block respectively, All Outlets, 52 w/e 31.12.22, Value Sales – % Change vs YA

## Plant-based performance

<sup>i</sup> <https://www.bbcgoodfood.com/review/best-vegan-cheese>

<sup>ii</sup> IRI, 4 w/e 31.12.22 YOY

<sup>iii</sup> Kantar, 52 w/e 04.09.22

<sup>vi</sup> <https://www.bbc.co.uk/news/business-63633479>

<sup>vii</sup> IRI, Major multiples, CYTD 10.09.22

<sup>viii</sup> IRI, Major multiples, CYTD 10.09.22

<sup>ix</sup> Veganuary 2023 | Home | The Go Vegan 31 Day Challenge

<sup>x</sup> Kantar, Total Market, 52 w/e 12.06.22

Bel UK

# Growing for good

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KEY BRANDS

**Babybel®**  
**Boursin®**  
**Port Salut®**  
**The Laughing Cow®**  
**Nurishh®**  
**GoGo squeezeZ®**

Bel UK, home to some of the category's most loved and trusted brands currently enjoyed in 41% of UK households<sup>1</sup>, continues to drive value by catering to consumers' evolving needs while championing healthier and responsible food for all, it says.

**Healthy snacking sales**

78% of British consumers believe snacking should be part of a healthy diet<sup>2</sup>, with cheese an important source of protein and calcium<sup>3</sup>, it notes. Over the past five years, cheese has made the largest share gains in terms of consumers actively seeking to increase their protein consumption<sup>4</sup>.

Bel UK encourages responsible consumption. Each 20g serving of Mini Babybel Original, the No.1 cheese snack format<sup>5</sup>, contains 59 calories. To help retailers maximise the on-the-go opportunity<sup>6</sup>, Babybel launched a two-pack format, which has delivered 238% YOY growth<sup>7</sup>, reveals Bel UK.

In addition, The Laughing Cow, the UK's No.1 cheese spread portion<sup>8</sup>, sees 65% of its total consumption come from the Light Range, at 25 calories per portion.

**Indulging appetites**

Despite rising living costs, consumers are more determined than ever to 'live a little', turning to micro-indulgences like food to deliver a visceral sense of pleasure<sup>9</sup>. To reflect this, Boursin, the UK's No.1 indulgence cheese brand<sup>10</sup>, continues to inspire creativity, says Bel UK. Impactful marketing to showcase how to 'upgraze' commonly wasted ingredients, with Boursin as the star ingredient, have spearheaded category



“Despite the rise in living costs, consumers are more determined than ever to ‘live a little’, turning to micro-indulgences like food to deliver a visceral sense of pleasure”

growth (+9% YOY<sup>11</sup>) and delivered 14.3% household penetration<sup>12</sup>.

**Planting seeds for success**

Bel UK delivers versatile plant-based alternatives, designed to meet varied consumer needs, it notes.

Nurishh, Bel's first 100% plant-based range, is loved by 81% of customers who try it<sup>13</sup>. Alongside its latest insight-driven NPD, Garlic & Herbs Spread and Gran Vegiano, there will be another exciting product launch in March. In addition, Babybel Plant-Based delivers a convenient vegan snacking option and, although a single SKU, it already accounts for 2.4% of the total market<sup>14</sup>. Meanwhile, Boursin Plant-Based Garlic & Herbs serves up unique indulgence for consumers seeking sophistication.

**Marketing that matters**

Bel UK continues to invest in causes that matter to customers, believing responsibility and profitability are intrinsically linked, it says. Boursin's 'You Create, We Donate' partnership with 2018 MasterChef winner Kenny Tutt and UK charity FoodCycle, raised awareness about food waste and over £20,000 for the charity, which feeds the hungry and lonely in society. This year, Babybel will also continue its 23-year partnership with Comic Relief, with the brand donating over £1.5m to date. Why not stock up on the limited-edition packs to show support and drive sales?



Source

<sup>1</sup> Kantar WPO, Total Market, Total Cheese, Total UK, Bel Brands, 52 w/e 25.12.22  
<sup>2</sup> YouGov, British Nutrition Foundation's Healthy Eating Week Research  
<sup>3</sup> Cheese is an important source of protein and calcium, which is needed for the normal growth and development of bones in children, as part of a varied, balanced and healthy diet  
<sup>4</sup> Kantar, 5 y/e 04.09.22  
<sup>5</sup> IRI All Outlets + KWP Discounters CYTD, 31.12.22  
<sup>6</sup> Babybel Original contains a good source of protein and calcium, which is needed for the normal growth and development of bones in children, as part of a varied, balanced and healthy diet  
<sup>7</sup> IRI, Total Grocery, 52 w/e 10.09.22  
<sup>8</sup> IRI, Value sales, total market, MAT to 25.12.22  
<sup>9</sup> Mintel, 2023 Global Food and Drink Trends  
<sup>10+11</sup> Total UK, Value Sales, 52 w/e 31.12.22  
<sup>12</sup> Kantar WPO, Total UK, Penetration, 52 w/e 25.12.22  
<sup>13</sup> 2293 respondents during Try Me Free activation June-August 2022  
<sup>14</sup> IRI, Major Multiples, CYTD, 31.12.22



# GROW YOUR SALES



**No.1**  
indulgence  
cheese brand<sup>1</sup>



**No.1**  
cheese snack  
brand<sup>1</sup>



**No.1**  
cheese spread  
triangle brand<sup>1</sup>



**WELL  
LOVED,**  
and available  
in slices!

...and introducing



Nourish your sales with  
our **NEW** brand.  
100% plant-based  
alternatives to cheese.

1. IRI, Total Market, Value sales, 52 w/e 25.12.2023



For more information visit  
[www.bel-uk.co.uk](http://www.bel-uk.co.uk)

## Blacksticks

# A cheese without boundaries

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### KEY CONTACTS

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4th Generation Owner

### KEY BRANDS

**Blacksticks**  
**Button Mill**  
**Sunday Best**  
**Kidderton Ash**

When standing at the fixture you'll see speciality cheese in one place, continental cheese in another, and 'territorial' cheese generally somewhere in the middle; the growing array of alternative cheeses are also making their way in from the peripheries, says Matthew Hall, fourth generation founder at Butlers Farmhouse Cheeses. "For Blacksticks, we believe cheese knows no boundaries and, over the past decade, have fought to open the door to speciality cheese, unshackling the shopper from a blinkered view of what's truly out there to tantalise their taste buds," he says.

"In recent years, British speciality cheese has seen steady growth as the way we eat becomes more adventurous; there is, however, room for so much more; 'speciality' can appear somewhat elitist or difficult to shop, with the cheeses coming across as old-fashioned or 'only for special occasions'," he notes. "As the original flag-bearer for



“Over the past decade, we have fought to open the door to speciality cheese”

speciality cheese, Blacksticks provides the bridge consumers need when stepping into more adventurous styles. The perfect mixture of eye-catching, recyclable pack design and mind-blowing great taste keeps customers coming back for more and opens doors to endless occasion opportunities.

“Get Blacksticks on board and open up the full potential of your cheese fixture.”



**UNLOCK**  
**CHEESE**  
**SALES**

**CHOOSE**

**BLACKSTICKS®**

**100%  
RECYCLABLE**

DELICIOUSLY CREAMY

**BLACKSTICKS®  
BLUE**



**BUTLERSCHEESES.CO.UK**

Eatlean

# Ready to take on ready meals

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 Founder  
**Barrie Saxby**  
 Business Unit Director

KEY BRANDS

Eatlean

↘ This month, leading low-fat cheese brand Eatlean launched its first ready meal with a healthier macaroni cheese. Now available across Asda stores within the fresh food aisle, the Eatlean Mac & Cheese contains 50% less fat<sup>1</sup>, two hidden vegetables and has an RRP in line with existing offerings, reflecting the growing trend for affordable nutrition, says business unit director Barrie Saxby.

While Eatlean has continued to grow its retail footing across the UK and key international markets over the last year, significant progress has been in the ingredients sector, as seen in Iceland's Myprotein ready meals, with six options containing Eatlean to meet the range's high-protein, low-fat credentials.

Tesco has also added Eatlean Grated Cheese alongside original block, supporting consumer trends to combine health and convenience, with 174% year-on-year growth for this SKU across UK retail<sup>2</sup>.

"However, shoppers enjoy cheese, we



“Consumers do not have to compromise to enjoy delicious cheese”

want to ensure a healthier alternative is available to them – whether via home delivery, ready meals, on-the-go and in retail,” says Saxby.

To build brand awareness in 2023, Eatlean plans increased sampling to showcase its range in application. “Eatlean is about making healthier easier; consumers do not have to compromise to enjoy delicious cheese.”

Source

<sup>1</sup> Than standard macaroni cheese  
<sup>2</sup> Internal company data

CONVENIENTLY  
 HEALTHIER



EATLEAN.COM

Grated 180g sales-in data, July - Dec 22 vs 21, UK Retail

Eurilait

# Unrivalled fresh and natural flavour

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Managing Director

KEY BRANDS

**Paysan Breton**  
Alfresco

↙ Eurilait, one of the UK's major suppliers of authentic and innovative speciality cheese and dairy products, supplies the UK retail, industrial and foodservice markets. As a subsidiary of two leading and highly experienced French dairy cooperatives (Laita and Eurial), the company's products are unrivalled in their quality and heritage as they come from a network of 20 certified creameries throughout western France, it says.

"Eurilait's delicious cream cheeses are delicately whipped giving a light and airy texture," says the company. "Our Paysan Breton cream cheese has an unrivalled fresh and natural taste that is a must in any fridge. The love and effort put into sourcing the ingredients to every pot of our cream cheese sets us apart on-shelf from other cream cheeses. We offer two flavours – French Sea Salt and Garlic & Herb – both with a beautiful texture and endless possibilities in recipes, which is



“Eurilait’s cream cheeses are delicately whipped, giving them a light and airy texture”

what makes consumers come back for more once they've tasted them.”

Paysan Breton, which is supplied to leading UK retailers, such as Waitrose, M&S, Sainsbury's and Ocado, brings authentic flavours to its customers' everyday lives, says Eurilait. "Our products are healthy, tasty and help protect the welfare of our farmers, their cows and the environment."



LUXURIOUS WHIPPED CREAM CHEESE

## Everyday Indulgence

The natural great taste in every pot of Paysan Breton cream cheese is testament to the love and care we put into sourcing our ingredients.

And we deliver that flavour with a delicately whipped, light and airy texture that provides that little taste of luxury every day.

- ⦿ No preservatives
- ⦿ No artificial colouring
- ⦿ No artificial flavours
- ⦿ Finest French ingredients.



## Long Clawson Dairy

# Inspiring foodies with Stilton

### DETAILS

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### KEY CONTACTS

**Bill Mathieson**  
Managing Director

### KEY BRANDS

**1912 Artisan Stilton®**

↙ The Stilton market is worth £45m, and holds a 41% share of the total blue cheese market by value<sup>1</sup>, says Long Clawson MD Bill Mathieson. It is now growing by 6% YoY, gaining value share in the total blue sector<sup>1</sup>.

“However, there is an opportunity to move Stilton off the traditional cheese board occasion, and into the more inspired everyday foodie category,” he says. “To this end, Long Clawson Dairy launched its first branded Stilton in its 110-year history in September 2022 – a new triple-graded Blue Stilton. Appropriately named 1912, after the year Long Clawson was established as a farming cooperative, the new cheese is made with milk from just over 30 local supplier farms, also owners of the business, allowing complete traceability back to individual herds.”

Stilton enjoys protected designation of origin (PDO) status and only six dairies are currently licensed to make Stilton in England. “Developed by



“Long Clawson has launched its first branded Stilton in its 110-year history”

Clawson’s Master Cheesemakers, who have over 200 years’ collective experience, 1912 is a creamy, well-balanced Stilton. Its recyclable packaging features a QR code linking to world-renowned Marco Pierre White, who is acting as an ambassador for the brand,” reveals Mathieson. “Launched in Tesco before Christmas, 1912 will be rolled out to other retailers across 2023.”

### Source

<sup>1</sup> Kantar Worldpanel, Cheese Purchase Data, 52 w/e 25.12.22

## STILTON® HAS A STORY: IT'S TIME TO TELL IT.

Find out more at [1912.co.uk](https://1912.co.uk)



# 1912

1912 Artisan Stilton® is here to tell the unique story of Stilton®, inspiring more consumers to purchase more often.

## GIVING CONSUMERS MORE

- ▲ Disruptive design
- ▲ Easy-open tear strip
- ▲ 100% recyclable
- ▲ Triple-graded for quality

For more info please call 01664 822332 or email [marketing@1912.co.uk](mailto:marketing@1912.co.uk)

Lactalis UK & Ireland

# Award-winning portfolio

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Group Marketing Director

KEY BRANDS

**Galbani**  
**Président**  
**Leerdammer**  
**Seriously**  
**Seriously Spreadable**  
**Galloway**  
**Orkney**

“As an innovative and forward-thinking dairy company, investing in our award-winning cheeses is the key to our success,” explains Heloise Le Norcy-Trott, group marketing director for Lactalis UK & Ireland. “So, keeping our market-leading brands – Président, Galbani, Seriously and Leerdammer – highly visible with impactful marketing campaigns and consumer-driven NPD, is a key priority for us in 2023 and beyond.

“Understanding what consumers want and how they live their daily lives is vital,” she says. “Throughout the year, we’ll tap into key consumer trends set to impact the category – including affordable luxuries, and cheese as a cooking ingredient or meat alternative.

“To respond to the consumer trend for convenience, in 2022 we launched Galbani Sliced Mozzarella. Galbani is the No.1 Italian cheese brand<sup>3</sup>, and No.1 mozzarella brand in the UK<sup>2</sup>, and currently accounts for £29m retail sales value<sup>3</sup>,” she reveals. “The new slices unlock a new segment of the chiller for Galbani, representing a key part of the brand’s over-arching vision to become the Italian cheese of choice in the UK.”

Meanwhile, as consumers seek out cheese as a meat alternative, the hot eating and baking cheese category is being driven by innovator Président Brie Bakes and a new and improved recipe and rebrand for our Seriously Cheese Nuggets, now named Seriously Crispy Melts, she reveals. “These are designed to appeal to vegetarian and flexitarian consumers alike, offering tasty and convenient meal-time solutions. This creates a new sub-category in the chilled hot eating fixture, which was previously focused on indulgent products, such as baking camembert and fondue.”



“Throughout the year, we’ll tap into key consumer trends set to impact the category – including affordable luxuries, and cheese as a cooking ingredient or meat alternative”

In March 2022, Lactalis also expanded its Seriously Spreadable range by introducing Seriously Spreadable Chili. The new variant, with its Great Taste Award and Highly Commended in The Grocer New Product Awards 2022, appeals to shoppers looking for new and exciting flavours, she notes.

“Also in 2022, a series of successful media campaigns for Galbani and the No.1 French continental cheese brand<sup>4</sup>, Président, saw Galbani back on air, promoting some of the range’s hero SKUs, including Galbani Mozzarella (125g and Maxi 250g) and Galbani Dolcelatte,” she says. “And the latest stage of our Président media campaign targeted ABC1 foodies aged 40-65, encouraging them to take things slower and enjoy the ‘Good Life’ with Président.

“With our portfolio of household favourites, we are committed to working collaboratively with our retail partners to develop the category and drive continued growth.”

Source  
<sup>1,3</sup> IRI All Outlets, Galbani Fixed Weight Cheese, Value Sales 52 w/e 31.12.22,  
<sup>4</sup> IRI data, 52 w/e 31.12.22



# PRÉSIDENT



No1 Brie brand, selling 3 times more than its closest competitor\*.

No1 Hot Eating SKU, in the cheese category\*.



Highest purchase frequency of any block butter\*\*.



\*IRI data 52 w/e to 31st December 2022

\*\* Kantar 52 w/e data to 25th December 2022

Mondelēz International

# Taking lunch to the next level

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 Trade Communications  
 Manager

KEY BRANDS

**Dairylea**  
**Philadelphia**

Philadelphia, the UK's No.1 cream cheese brand<sup>1</sup> and Dairylea, the UK's No.1 processed cheese<sup>2</sup>, offer shoppers the taste they know and love with the quality they can rely on, says Mondelez International trade communications manager Susan Nash.

### Upgrading lunch

The lunch occasion lies at the heart of the Philadelphia and Dairylea brands, she explains. "In recent times, some shoppers are making their on-the-go lunches at home to save money," she says. "Philadelphia's iconic, creamy taste can upgrade these, making them as delicious and exciting as ones bought while out and about. Also, Dairylea's extensive range of Snackers and Lunchables are trusted by families to provide tasty and convenient on-the-go lunchtime snacks."

### Offering even more choice

Many shoppers are reviewing their snacking choices lately: while some are selecting 'better for you' options, reflected in the category's 7.9% growth<sup>3</sup>, others are adopting more plant-based diets, notes Nash. "As part of our Snacking Made Right mission, we want to offer the right snack, for the right moment by providing a wide range of options for all consumers – and our cheese ranges do just that," she says. "For example, Dairylea Filled Crackers contain convenient and individually-wrapped portion packs of crunchy wholegrain crackers with a cheesy filling. A new campaign will soon roll out across the nation to promote the product to shoppers. Dairylea Light and Philadelphia Light offer the same fresh and creamy taste



“Dairylea’s extensive range of Snackers and Lunchables are trusted by families to provide tasty and convenient on-the-go lunchtime snacks”

shoppers know and love but with reduced fat. For shoppers looking for more protein, they can consider the Dairylea Lunchables range, which includes chicken and ham options, as well as Philadelphia Lightest, which is packed with 11% protein. Philadelphia Plant-Based is perfect for those seeking a plant-based option, as it has a unique recipe that combines oats and almonds into a delicious and creamy spread. Alternatively, for those seeking a more premium gourmet snacking option, new Philadelphia Intense delivers an intense taste experience in two delicious flavours with natural ingredients and a creamy, aerated texture.”

### A heritage of high quality

The cream cheese category grew by 2.3% last year<sup>4</sup>, reveals Nash. "Importantly, shoppers are looking to buy from brands they know and trust. 67% of people are saying they'd rather buy fewer amounts of their favourite snack brand, than buy the less expensive generic alternative<sup>5</sup> – making brands such as Dairylea and Philadelphia key offerings to shoppers, with a heritage of investment and innovation that retailers can depend on.”



Source

<sup>1</sup> Nielsen, Total Coverage, Value Sales, MAT data to 31.12.22  
<sup>2</sup> Nielsen, Total Processed Cheese, Market Share, 52 w/e 08.10.22  
<sup>3</sup> Nielsen UK Scantrack Data, Total Coverage, Value Sales, Latest 12wk period to w/e 03.12.2022  
<sup>4</sup> Nielsen UK Scantrack Data, Total Coverage, Value Sales, YTD period to w/e 03.12.2022  
<sup>5</sup> Global State of Snacking 2022 Report – <https://tinyurl.com/yky2zvez>

# GET SET FOR LUNCH



## #1 CREAM CHEESE BRAND IN THE UK\*



a good source of calcium

# dairylea

## #1 PROCESSED CHEESE BRAND IN THE UK\*\*



\*Nielsen, Total Coverage, Value Sales, MAT Data to 31.12.22  
\*\*Nielsen, Total Processed Cheese, Market Share, 52w w/e 08.10.22

Violife Foods

# Plant-based partnerships

DETAILS

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 Head of Violife  
 Northern Europe

KEY BRANDS

**Epic Mature Cheddar Flavour Block**  
**Original Flavour Grated**  
**Original Flavour Slices**  
**Le Rond Camembert Flavour**  
**Smoky Cheddar Flavour Slices**

“More and more consumers are trialling flexitarian diets, with two of the reasons being a desire to do better by the planet, as well as a wish to improve their own health & wellbeing,” says Victoria Slater, head of Violife Northern Europe.

“Violife is prioritising being an accessible and introductory option for these consumers, whether they are looking for lunch on-the-go or cooking at home. By offering customers simple plant-based swaps through easily identifiable flavour options and convenient formats, switching to Violife allows them to have their favourite cheezy foods the way they like them.”

**Foodservice partnerships**

Violife has recently introduced a number of strategic key foodservice partnerships including Pret, Burger King and Pizza Hut Delivery to provide customers with easy and convenient solutions when adapting to a more plant-based diet either on-the-go or ordering in at home, reveals Slater.

“Giving customers the choice to order plant-based alternatives of their go-to meals from their favourite restaurants, allows them to experience how easy and satisfying these swaps are to make – all without having to compromise on taste,” she says.

This Veganuary, Violife partnered with industry-leading partners to re-imagine iconic restaurant classics. “One of our most recent launches has been the Vegan Royale Bakon King at Burger King,” she says. “The burger is a re-imagined plant-based version of Burger King’s much loved Bacon



“Dispelling the myth that plant-based or vegan food will not taste or perform as well as its dairy-based counterparts, Violife is working with foodservice chains to recreate the delicious menu classics”

King, and is of course packed full of melty vegan Cheeze and crispy vegan Bakon. It can now be enjoyed at Burger Kings nationwide.”

Violife also launched two new vegan sandwiches with Pret A Manger. The Spicy No’Duja Toasted Focaccia and Plant Ploughman’s Baguette both feature Violife’s Smoky Cheddar Slices and offer options to vegans, flexitarians or those looking to try new tastes and make a difference to the planet, as part of the restaurant’s new 2023 menu.

**No need for compromise**

Slater concludes: “Dispelling the myth that plant-based or vegan food will not taste or perform as well as its dairy-based counterparts, Violife is working with foodservice chains to recreate the delicious menu classics, demonstrating how making the switch to a vegan option doesn’t mean you have to compromise on your favourite out-of-home treats.”

A match made in heaven.

*Violife*  
100% Vegan

+



Vegan Royale Bacon King

**THE WAY YOU LIKE YOUR BURGER.**  
**NOW 100% PLANT-BASED**

Violife Now Available At Burger King Nationwide

## Wyke Farms

# Planet-friendly cheddar

## DETAILS

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## KEY BRANDS

**Wyke Farms**  
**Ivy's Reserve**

“Our grandmother Ivy used to say that if you look after nature, then nature will look after you,” says Richard Clothier, third generation cheese maker and managing director at Wyke Farms. “It’s fitting, therefore, that we would make our flagship Vintage cheddar, Ivy’s Reserve, to be the world’s first carbon-neutral cheddar. It doesn’t end there, though; we are reducing the impact of everything we make and do at Wyke Farms as we strive towards being a net-positive business.”

Shoppers across the world want to see the environmental impact of dairy being reduced, says Clothier. “This is why we have worked with the Carbon Trust to cradle-to-grave footprint our products to PAS 2050 and certify our Ivy’s Reserve Vintage cheddar as carbon neutral to PAS 2060.

“This work starts with our primary Scope 3 emissions, where we work with our milk producers on-farm to affect our ‘Environmental Pillar System’. This reduces GHG emissions on farms by bringing everyone up to the standard of the best. We now have farms in our low carbon group, including our own family farms, that produce milk at less than 25% of world average emissions. In addition, we are funding farm energy audits, soil sampling to measure carbon sequestration and ruminant feeding trials.

“At Wyke Farms we don’t just say ‘good cheddar needn’t cost the earth’, we live by it,” he adds. “We are investing more in producing our own self-generated renewable energy and green gas which, in addition to reducing environmental impact, also reduces costs. We are rebuilding our new cheese dairy to the highest environmental standards of water and



“At Wyke Farms, we don’t just say ‘good cheddar needn’t cost the earth’, we live by it”

energy usage, using the latest heat and water recovery techniques, and powering it using renewables. Built as a highly automated, efficient new dairy, it will double our capacity and allow us to make more cheese using milk from grass. We won’t be changing our over 100-year-old recipe and still culture our own starters, so that no other cheddar in the world can taste like Wyke Farms.”

Compared to other cheddar brands the Wyke Farms brand occupies a unique position in its appeal with older shoppers<sup>1</sup>, reveals Clothier. “These shoppers are more valuable than the average shopper and a larger proportion have shown they will remain loyal to the brand. Aside from provenance and quality, they are also concerned about the environment and are increasingly looking for products with solid green and environmental commitments. Our 100% green strategy really fits with this growing trend.”

Meanwhile, as the cost of eating out has increased and budgets are reduced, consumers have got used to fine dining at home with friends and enjoying the best food from where they originated in the world, he says. “It doesn’t get more authentic than our prize-winning Ivy’s Reserve Vintage cheddar produced to our grandmother Ivy’s 100-year-old family recipe in Somerset, close to the village of Cheddar. That’s why this first-of-its-kind carbon-neutral cheddar is winning fans on four continents.”



## Source

<sup>1</sup> Kantar Worldpanel, Wyke Farms report, 18.09.18

— THE —  
WORLD'S FIRST  
CARBON NEUTRAL  
CHEDDAR.

*KIND ON THE PLANET,  
DELICIOUS ON CRACKERS.*



We make Ivy's Reserve vintage Cheddar with 100% Green Energy from solar power and biogas generated on our Somerset farm. It's been winning awards for its taste for a century and now it's the first Cheddar in the world to be certified carbon neutral. Your customers will love it, and so will the planet.



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