



Bringing bakery
excellence
to every meal.

finsburyfoods.co.uk

Our Vision

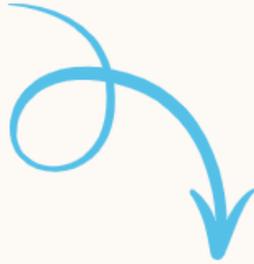
Finsbury Food Group's vision is to be a leading speciality bakery group in the UK, dedicated to delivering complete business excellence for the planet and our people. We will be responsible for elevating bakery standards that bring joy to everyday moments, through baked goods that delight consumers, inspire retailers and enhance operators - making every meal memorable.

Our Mission

We are passionate about baking excellence to create the highest quality bakery products. Through mass production capabilities that cater to the evolving tastes of the consumer and the out of home market, our approach embraces excellence, passion, innovation and creativity to elevate every meal, all whilst supporting our supply chain, people and partners in their growth journeys.



Why Us?



Unwavering Excellence

Dedicated to delivering bakery excellence from field to fork and upholding the highest standards across the industry. Excellence is not a goal for us; it is a continuous pursuit.



Progressively Agile

A culture built on dynamism and agility ensures market changes and bakery trends can be swiftly adopted. Innovation and leading infrastructure ensure we're built for the future.



Sustainable Supply

By implementing responsible sourcing, efficient processes, and eco-friendly initiatives, we strive to champion our planet and people through responsible business practices.



People First

Committed to our people and all people throughout our supply chain, we invest in constant development and foster inclusivity to maintain a thriving community of excellence.



Collective Pride

We take collective pride in our purpose, celebrating both output quality and process. This pride ensures our retail and foodservice customers receive the highest quality outcome.

About Finsbury

Finsbury Food Group Ltd is the bakery brand you never knew you'd tasted! For over four decades, we've been creating delicious baked goods that bring joy to millions across the UK and Europe. From celebration cakes to buns and rolls, our diverse range reflects our **commitment to quality, creativity, and customer satisfaction.**

As a leading speciality bakery manufacturer in the UK and Europe, we take pride in blending traditional methods with the latest technology. Our journey in building such a remarkable family of bakeries is testament to our dedication, adaptability, and unwavering pursuit of excellence.



UK Bakery Market Snapshot

Leading Market Positions

Cake

- **70% market share** in the whole cake category
- **40% market share** in the UK celebration cake category
- **85% market share** in the branded celebration cake category

Bread & Morning Goods

- **37% market share** in Artisan Bread category
- **29% market share** in Brioche Buns category
- **38% market share** in Hot Cross Buns category
- **Largest frozen bakery** supplier in Wholesale Foodservice channel.

Overview of **three** strategic pillars



Excellence

We invest in our people and bakery sites to create a strong foundation for our strategy.

Innovative, high-quality bakery products are at the core of what we do, ensuring we anticipate and respond to key market trends.

Customer and consumer needs sit at the heart of our decision-making.



Growth

We drive progress through a balanced approach of organic growth and targeted acquisitions.

Our ambition is to succeed across retail grocery and out-of-home channels, both in the UK and Europe.

We continue to develop a robust licensed brand portfolio to complement our key retailer relationships.



Responsibility

Our commitment to sustainability is built on a holistic framework that places people's development, engagement, and wellbeing front and centre.

We are continually reducing our impact on the planet by investing in innovative technology, expertise, and shared ownership with our growth partners.

Finsbury Sites



Meet the **family** of bakeries behind the products you love

We strategically unite independent bakeries into a dynamic group of exceptional manufacturing and distribution sites, each **bringing unique craftsmanship, innovation and expertise to our collective**. Our portfolio now includes ten manufacturing sites across the UK and Europe, employing 3000 people.

Acquisition Timeline



Brands we work with...

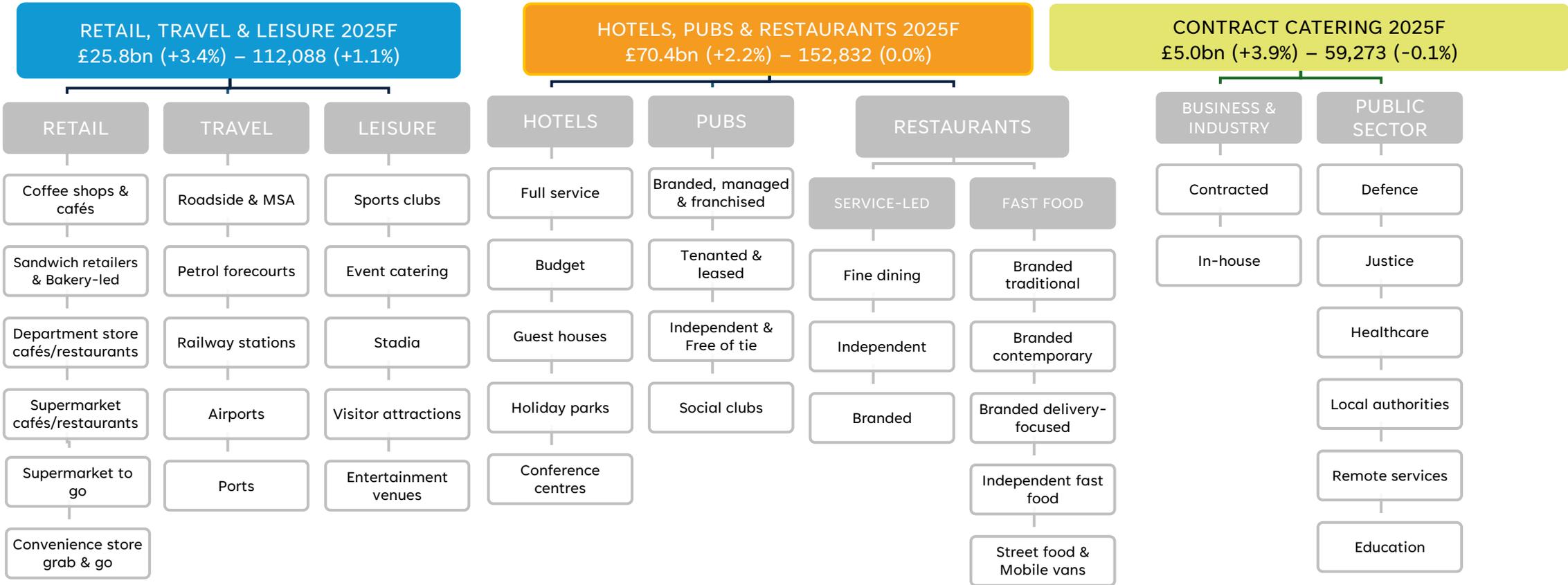




Foodservice Updates

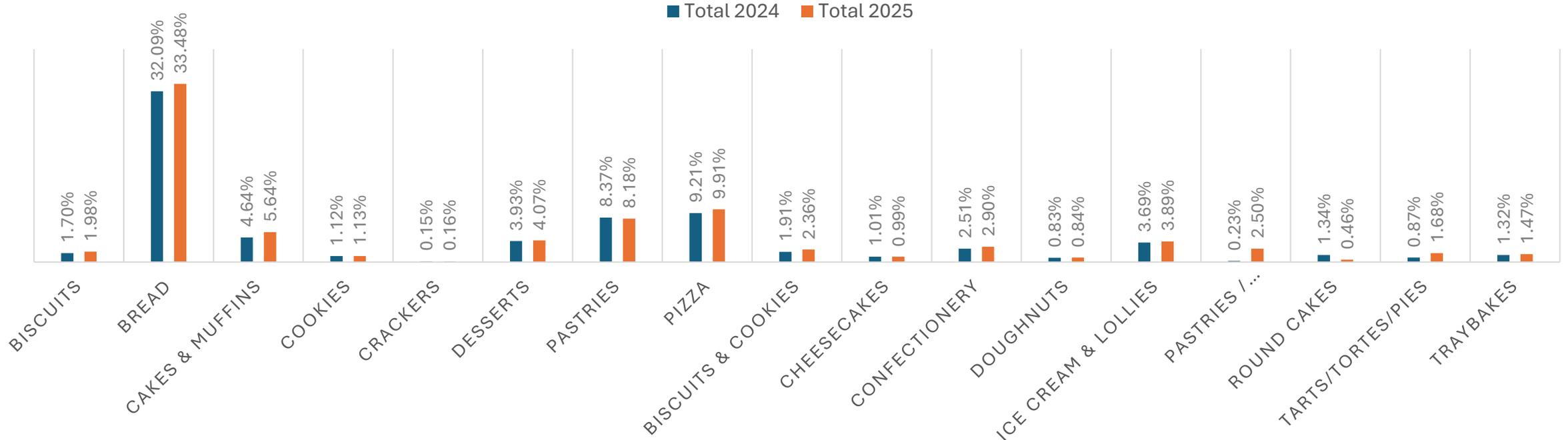
Total UK eating out market landscape 2025F

OUT OF HOME MARKET 2025: Value: £101.3bn (+2.6%) – Outlets: 324,193 (+0.4%)



Total Bakery Drill Down

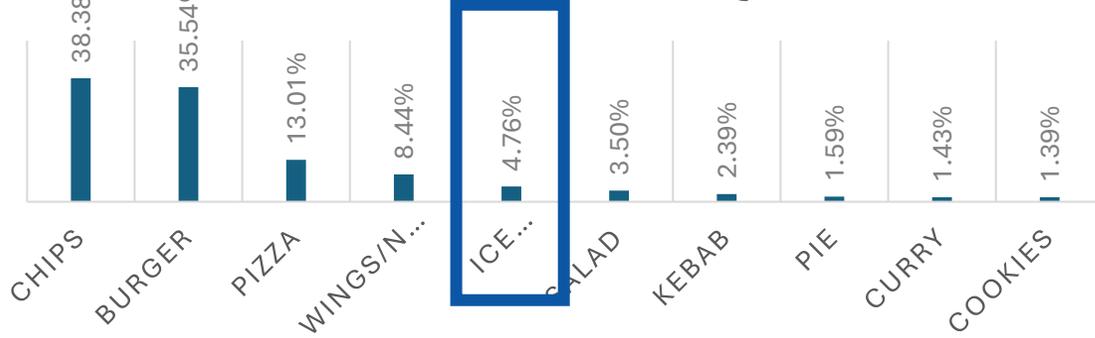
TOTAL BAKERY % OCCASSIONS FY24 VS FY25



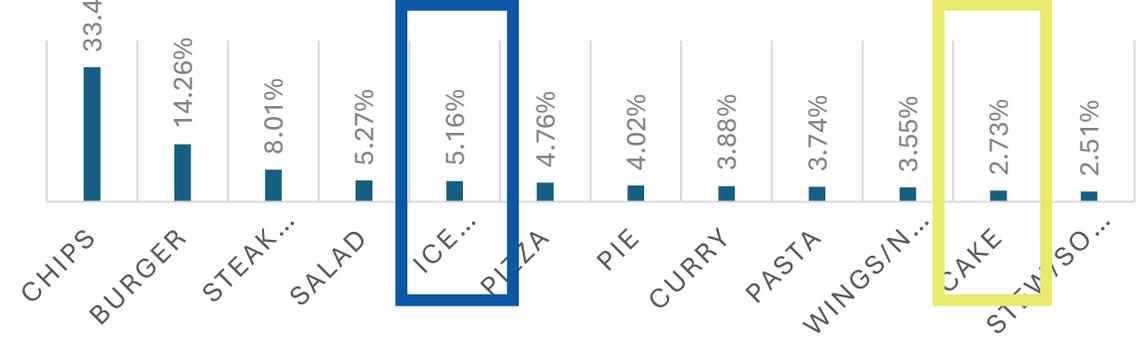
- Bread leads the way in total bakery with cakes and muffins on the increase due to the cost of living.
- Bread bakery items driven by the lipstick effect of consumer confidence declining but still wanting to have a sweet treat option.

Overall Total Top 10 Food Items across sectors last Q4

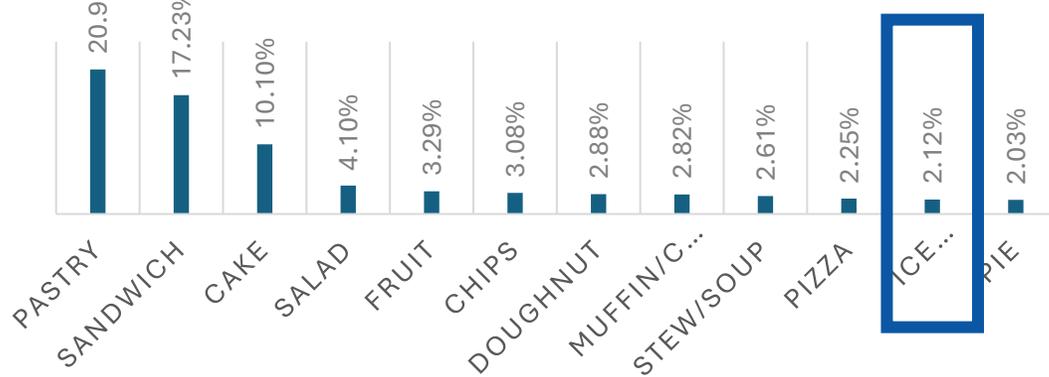
TOP FOODS IN QSR



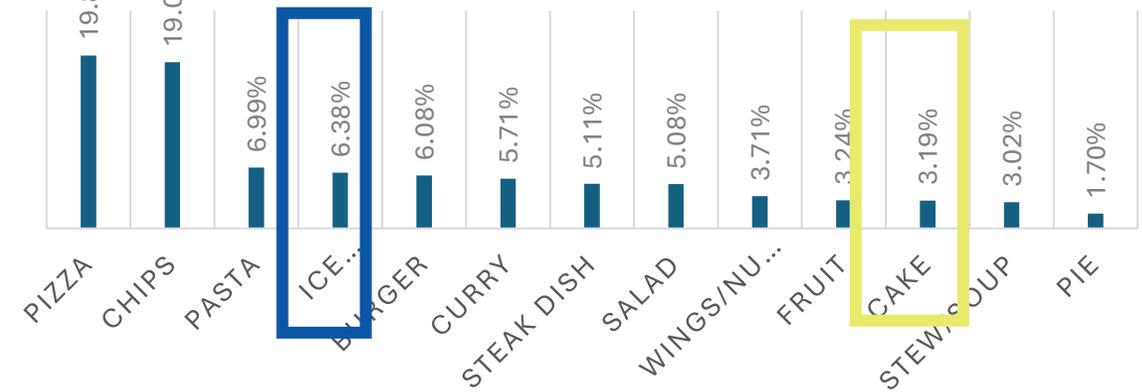
TOP FOODS IN PUBS



TOP FOODS IN COFFEE SHOPS



TOP FOODS IN RESTURANTS



Ice cream features in the top 10 foods for every sector. Operators would do well to add hot eat cake options to menus, which partner well, with & without ice cream.



OUT OF HOME PERFORMANCE Buns & Rolls

Burger's grow in share of dish growth within OOH market, up +0.6ppts to 16.9%

76% of diners describe themselves as value conscious

QSR's clocked in the biggest increase (+2.3ppts), driven by their convenience and affordability

25-34 being the age group driving growth in OOH

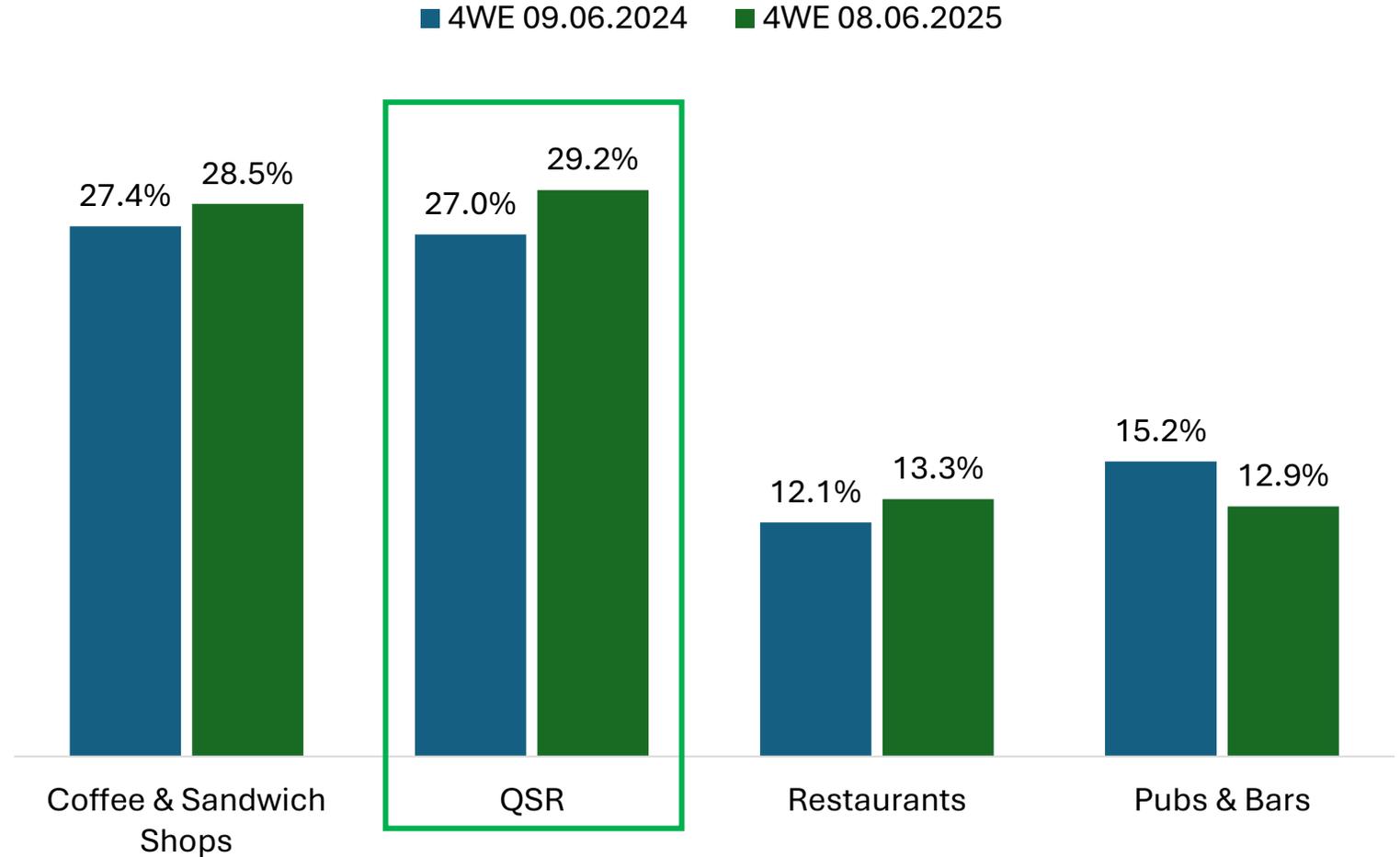


UK Eating Out Market – Growth of QSR's

UK Eating Out Market: Channel share of occasions

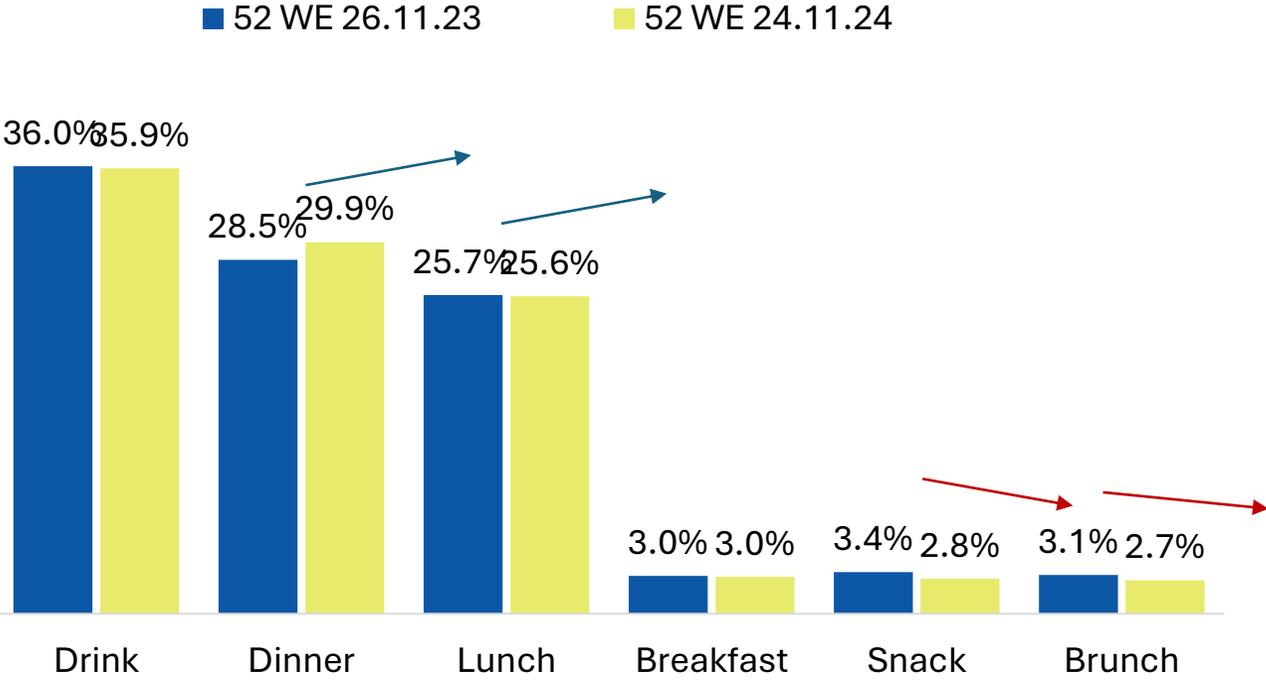
QSR's clocked in the biggest increase (+2.3ppts), driven by their convenience and affordability.

Coffee shops and restaurants gained +1.2ppts as consumers opted for high ticket experiences. Pubs and bars fell (-2.3ppts), missing the seasonal uplift from warmer weather and sports events.



Pubs & bars need to **grow incremental trips** through wider day-parts and missions

Pubs share of occasions by day-part, 52 WE 24.11.24



Afternoon tea	Bottomless brunch	Sunday roasts
<ul style="list-style-type: none"> Scones Cakes Varied sizes 	<ul style="list-style-type: none"> Breakfast breads Sweet bakery Sharing doughnuts 	<ul style="list-style-type: none"> Classic desserts Nostalgia trends

DOUGHNUTS

Bag of lemon bomboloni with salted caramel mascarpone and Nutella mascarpone (the iconic Italian hazelnut spread) /

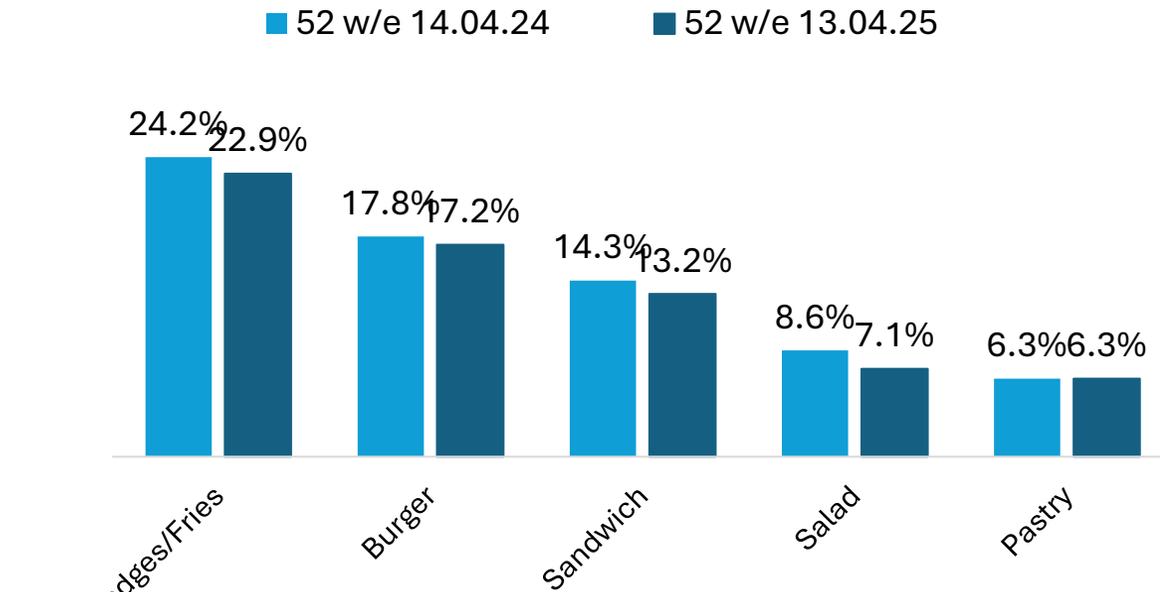
£7.5 / share £10 / table £12

Albion & East, bottomless brunch dessert offer

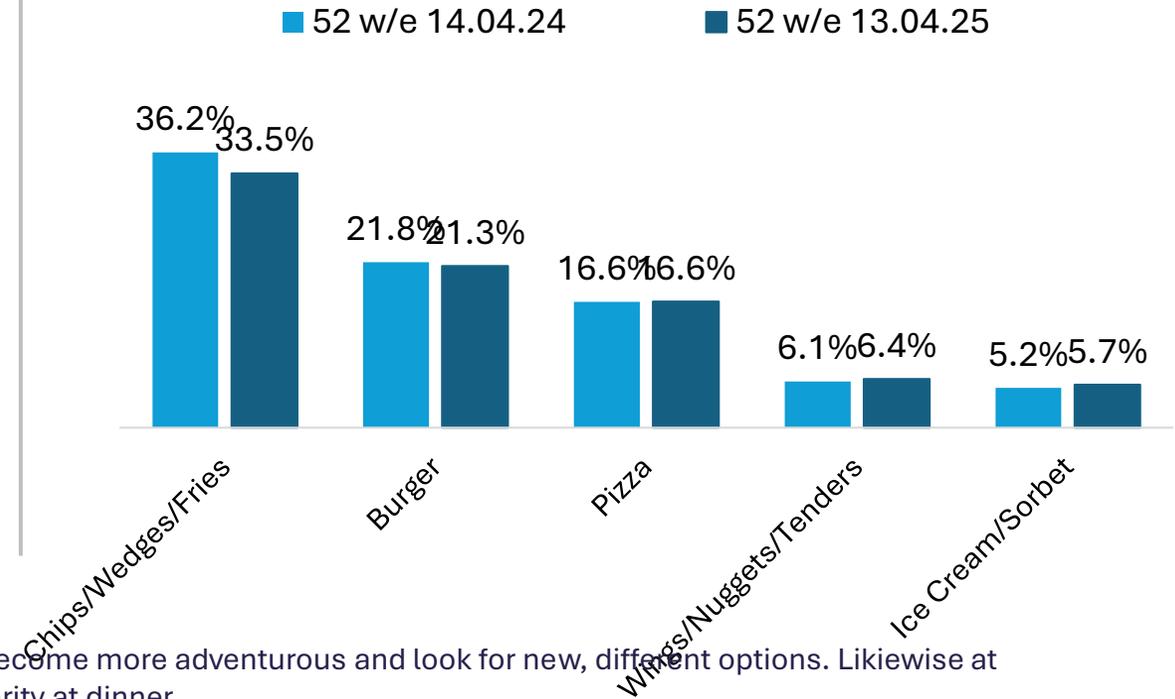
Source: Lumina Intelligence Eating and Drinking Out Panel, data collected 52 WE 24.11.24

Popular dishes lose share, **creating space** for innovative meals

Dishes - Lunch



Dishes - Dinner

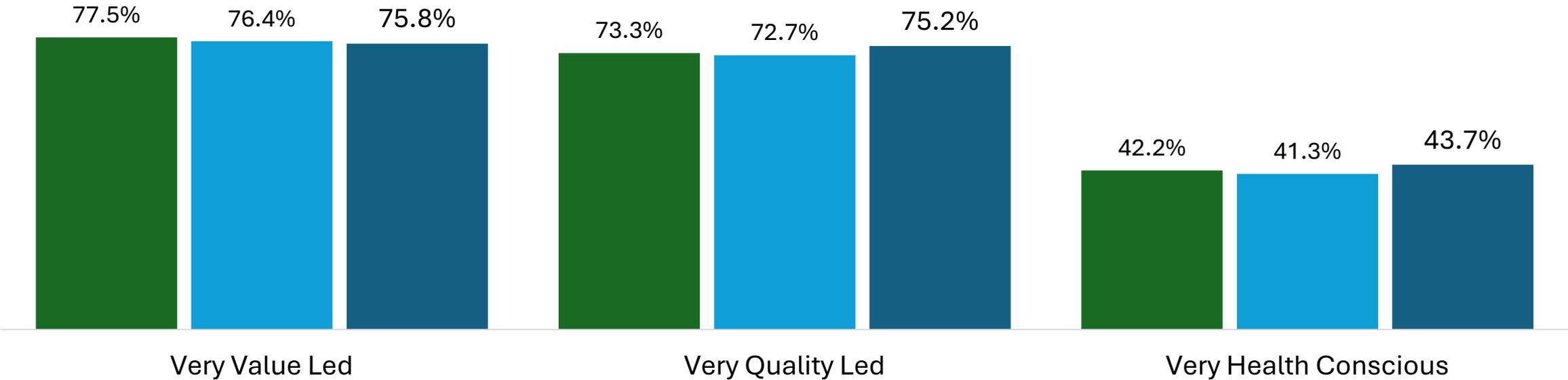


- We've seen a decline in some of the top dishes at lunch, as consumers are starting to become more adventurous and look for new, different options. Likewise at dinner, we have seen a decline in share of burgers, while pizza is flat maintaining popularity at dinner
- So there's a couple of things happening here
- 1) ops for interesting innovation away from the staple dishes to create a point of difference, something unique and to keep consumers coming back. Things like social media have been huge for introducing consumers to new and different dishes
- 2) within these staples, be it burgers, pizza, sandwiches and salads – we are seeing pockets of growth that is very much being driven from quality and indulgence or the elevation of classics

Innovation should focus on **quality and health**

Psychographics – Sample Size Share %

■ 52 w/e 16.04.23 ■ 52 w/e 14.04.24 ■ 52 w/e 13.04.25



➤ Looking at psychographics which are the behaviours and attitudes to understand what’s important to consumers, what we see is that innovation should focus on quality and health as these are the psychographics that have seen key growth over the last couple years. Price is important, just less so as value for money perceptions have shifted so consumers aren’t just looking for the cheapest options, they’re happy to spend more but have to get higher quality for this. For operators' innovation should focus on delivering quality, novel experiences, and giving compelling reasons to visit is important.

Quality, health and wanting to try something new are driving decisions in QSR

QSR growing drivers and missions, 52 WE
24.11.25

Quality of ingredients	Healthy food options	To try something new or different
13.4%	5.9%	2.7%
+0.8ppts	+2.5ppts	+0.6ppts

What does this mean?

- Communicate quality credentials
- Opportunities to innovate with flavours in core ranges
- Opportunities to diversify to different products



New Product Analysis- Trends

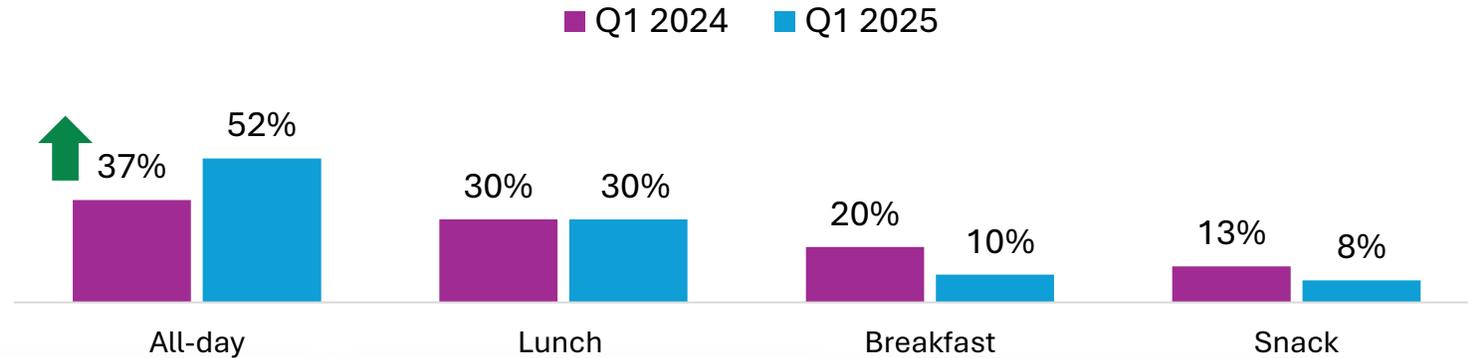
OOH

NPD focuses on catering to **all day** consumers

New products in the all-day day part have grown share by +15ppts. Busy consumers are seeking versatile options that are available to them throughout trading hours, also seen in the trend of made to order hot food.

- Made to order hot items including Gregg's Hot chicken burger (£4), Leon's Build your own Super Bowl (from £7.99) and Coco di Mama's Pinsa range (£5.95) are all freshly made at the point of order, boosting operator freshness credentials, aiding quality perceptions.

Share of New Products by Day Part, Q1 2024 vs Q1 2025



Fiery 'Nduja, Salami & Chilli Honey Pinsa, Coco di Mama (£5.95)



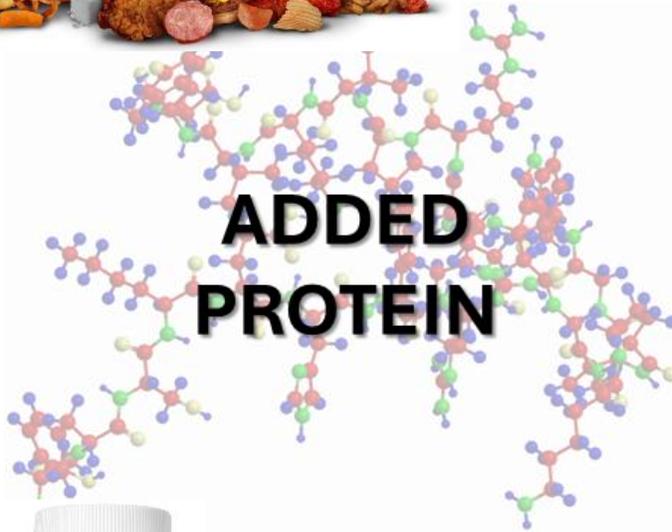
Leon



Hot Chicken Burger, Gregg's. (£4)



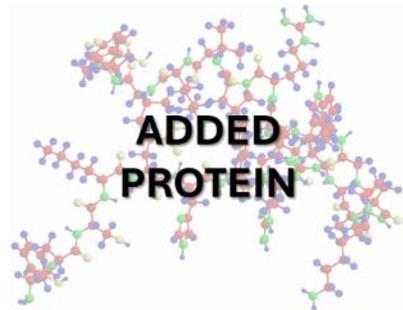
Health agenda in all categories



NPD across all categories continues to focus on functional nutrition with added protein

65% of shoppers would be likely to try a bread product with added protein

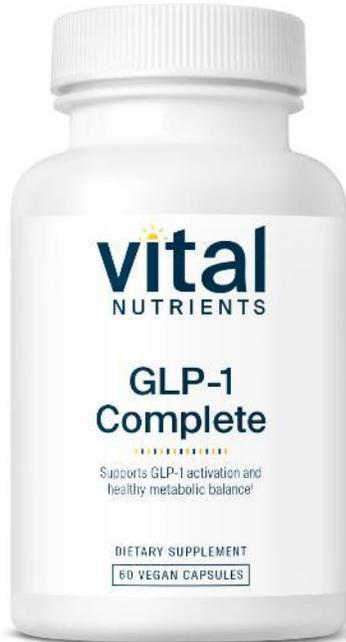
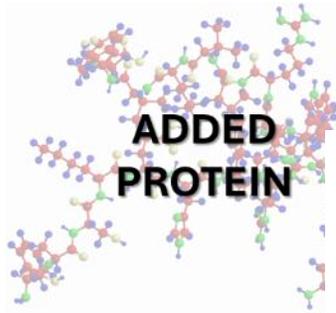
Health agenda in all categories



Ultra Processed Foods continues to create a lot of noise, with little to no clear definition for the consumer on what it really means

Consumers are seen avoiding *processed foods* and aiming to consume more whole foods with cleaner labels. We have seen an increase in sourdough bread, in line with the consumer need for natural bakery products. Menu's meet this trend with sourdough additions and regen flour.

Health agenda in all categories



Sponsored



My Juniper

<https://www.myjuniper.co.uk> · weight · medication

No GP Referral, Just Results | Discreet Next Day Delivery



Delivered to your door. Ongoing unlimited support from experienced dietitians.

Sponsored



SheMed

<https://www.shemed.co.uk> · medical · weight_loss

SheMed 1st Month- £25/week - Mimics GLP-1 ...

Join SheMed online today. Unlock 24/7 support and free next-day delivery to your doorstep. Begin your weight loss journey today and join the thousands already...



Sponsored



MedExpress

<https://www.medexpress.co.uk/weight-loss/treatment>

No Subscription Required - Now £119 - £30 Off 1st Order

Over 1.5 Million Customers. Discreet Packaging & Fast Delivery. Start Your Consultation. MedExpress Online Pharmacy. #1 For Weight Loss Medication. GPhC Regulated. Get...

GLP-1 medications place a threat on the nutrition of those who take the drug. GLP-1 suppresses appetite and can affect taste preferences, even reducing the desire for high fat and sugar foods.

New pizza items are premium and feature hot honey

Chain
restaurant

Pizza share of
main dishes
25.9%

+4.7ppts YOY



Ask Italian

NEW PRAWN PICCANTE

Juicy prawns marinated in **Calabrian chilli honey** with roasted peppers and balsamic onions on a ... [READ MORE](#)

901 kcal



Zizzi

Rustica Venison Pepperoni & **Hot Honey**

Rich venison pepperoni, candied jalapenos, mozzarella, and riserva cheese. Finished with a driz... [Read More](#)

1143 kcal

Special Guest

THE SPICY GOAT

Goats Cheese, roquito pearl slices, red onions, topped with **hot honey drizzle**

 Spicy



Pizza Hut

New innovation in the **pizza** space

- There's been some talk around New York style pizzas becoming more of the mainstream in recent months e.g Alley Cats - more independents than chains at the moment - pizza by the slice also making a comeback with Breadstall
- Zia Lucia: Charcoal is also known to aid digestion, so works well with health conscious consumers. And it has novelty of a different colour with the vegetable activated charcoal. They also have gluten free pizzas



Zia Lucia



It's all about the bun



Focaccia Mia



Shake Shack



Fat Hippo

- Social media and immersive experiences are key drivers behind the success of NPD and menu innovation, with theatrical menu items tied to major film releases gaining traction. These offerings blend dining with entertainment, leveraging cultural relevance and novelty to boost consumer engagement, amplify shareability, and foster brand collaboration.
- This trend reflects growing consumer demand for story-driven, memorable experiences that seamlessly merge popular culture with the eating-out market, creating both emotional connections and tangible sales growth.

Wellness add ons make functional ingredients accessible

Black Sheep Coffee has launched a range of functional lattes that feature marine collagen, pre-biotic fibres or lions mane mushroom to target a specific function.

The functional shots cost between £0.99 and £1.09 and can be added into any Black Sheep drink, including matcha, smoothies and any hot or cold offering meaning the operator can easily upsell to curious consumers.



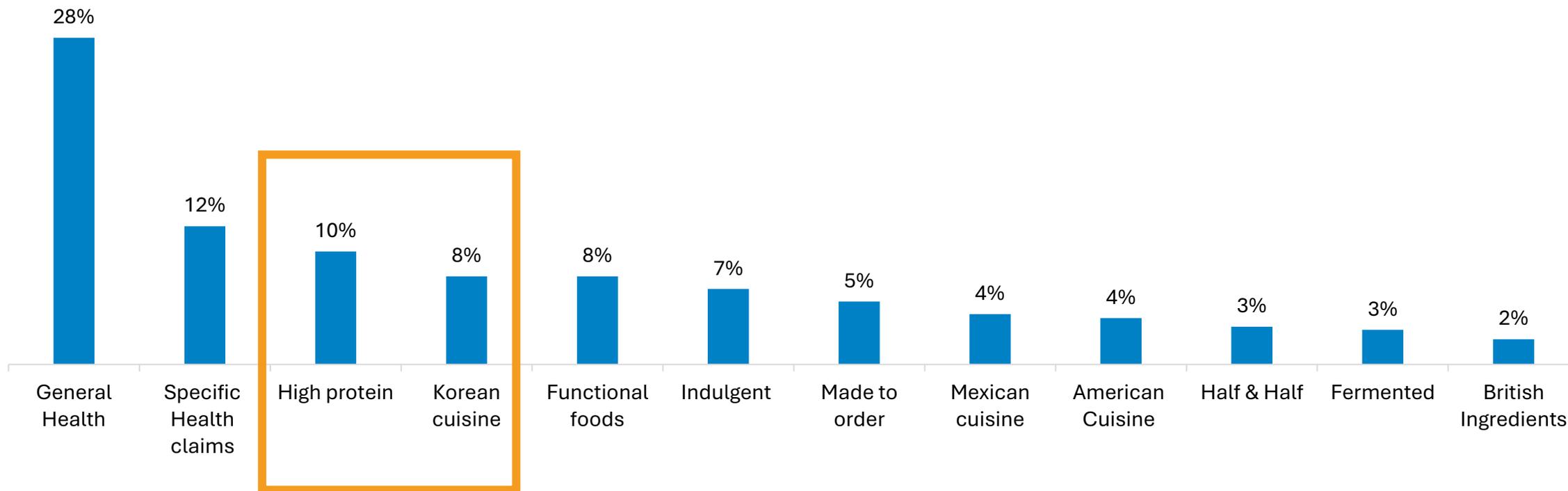
<p>LATTE</p> <p>Espresso topped with steamed milk and a thin layer of micro foam.</p> <p>Dietary info Ingredients Nutrition</p> <p>Energy 184 kcal / 770 kJ</p>	<p>Turmeric Syrup</p> <p>£1.39 58 kcal</p>	<p>Beauty Blend Shot</p> <p>Marine collagen</p> <p>£1.09 18 kcal</p>	<p>Gut Blend Shot</p> <p>Pre-biotic fibres</p> <p>£0.99 9 kcal</p>	<p>Brain Blend Shot</p> <p>Lion's mane mushroom</p> <p>£0.99 3 kcal</p>
--	---	---	---	--

Black Sheep Coffee



Health is the most popular NPD trend

2025 Trend Incidences



- Health leads 2025 trend incidences on NPD products, with a slightly smaller proportion of new products reporting specific or specialised health claims such as being beneficial to the brain, skin or boosting immunity. Increases in consumer interest and education around functional health mean they're seeking more recognisable benefits rather than vague 'better for you' claims.



FTG boosts Korean ranges to entice consumers

Wasabi's latest Korean BBQ range features 4 products infused with the flavours of classic Korean BBQ. The range spans both hot mains and snacks with snacks such as pork ribs with gochujang hot honey (£4.95) and varied mains like the Korean BBQ ramen bowl, which is filled fresh at the till (£6.95) and the BBQ sando which includes a dipping sauce (£5.95.) Non-Asia specific to go brands are also capitalising on the Korean BBQ trend, with Supermarkets such as Tesco releasing a Korean BBQ Style Chicken, Bacon and Cheese Wrap (£3.00) and Leon releasing a Korean BBQ Pork Bowl for the higher price of £7.99 for the hot item.



BBQ Pork Bowl, Leon (£7.99)



Korean BBQ Ramen Bowl, Wasabi (£6.95)



BBQ Sando, Wasabi (£5.95)



BBQ Style Chicken Bacon & Cheese Wrap, Tesco (£5.95)



Chicken wars are **spicing it** up

There is now a crowded battlefield in the 'chicken wars', with multiple brands pushing bold, spicy poultry offerings. 'Hot' dominates flavour trends, reflecting a race to outdo rivals through heat and 'swicy' aromas. While Dave's Hot Chicken isn't featured this period, its influence looms large shaping competitors' menu, intensifying the fight for spice-driven differentiation.



Chicken Cottage, Hot & Spicy Box



O'Neill's, Blazin' Blue Burger



GBK, Satay Chicken Salad

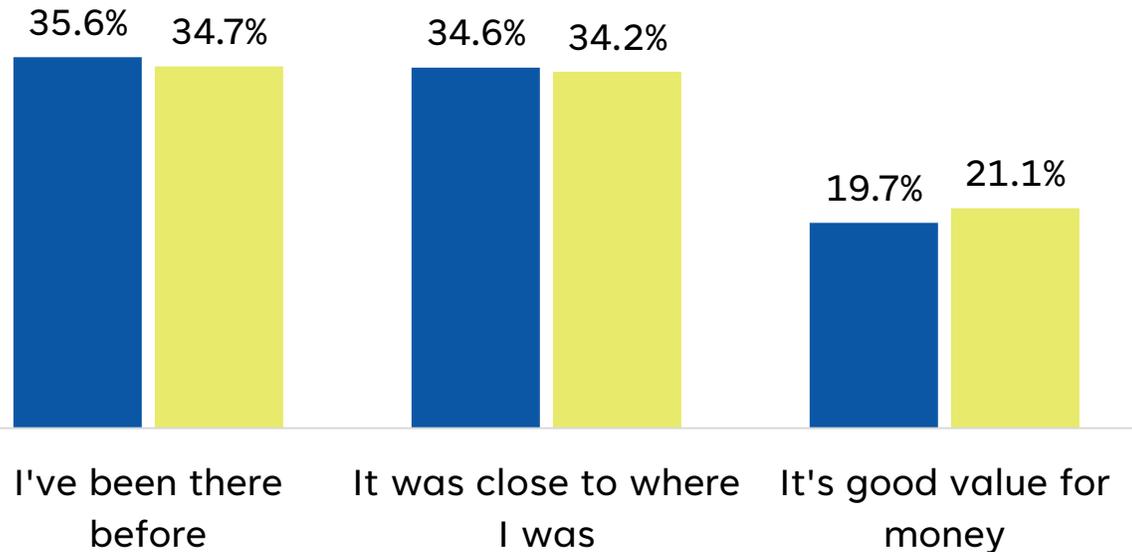


Popeye's, Hot Honey Chicken

Branded confectionary partnerships can deliver value for money credentials

Top Coffee & sandwich reasons for choosing a venue, 52 WE
24.11.24

■ 52 WE 26.11.23 ■ 52 WE 24.11.24



What does this mean?

- Branded confectionary partnerships can elevate quality credentials – burgeoning value for money perceptions

Restaurants launch **new desserts** featuring branded products

Operators are using branded components in new desserts to resonate with consumers. Utilising recognised brands on menus boosts quality credentials.



NEW

Loaded Cookie Dough made with ROLO® 

Serves 1 (623 kcal)

Chocolate Chip Cookie Dough with Little ROLO®, served with a scoop of vanilla ice cream & a drizzle of salted caramel sauce

+ £7.99

Pizza hut loaded cookie dough with Rolo



chocolate dough.chi™

215 kcal |  

Yo! Sushi chocolate dough.chi

PREZZO FAVOURITE



Lotus Biscoff Cheesecake with Banana

Our twist on the classic banoffee pie, light cheesecake topped with a biscoff biscuit crumb, served with fresh banana and drizzled with chocolate sauce

NUTRITION INFO +  

Prezzo Lotus Biscoff cheesecake with banana



6 dessert items on restaurant menus contain Lotus Biscoff, **+3** items year-on-year



The products you love,
the family we're proud of



finsburyfoods.co.uk

