The Grocer

Focus On: Cheese by Nick Hughes (nickjhughes@hotmail.co.uk)

Publishing: 26 November
Advertising deadline: 9 November
Submissions deadline: 31 October

The Story

Cheese prices continue to crumble as shoppers are lured to own label by ever keener prices. In the past year, the price differential between branded and own label cheese has widened. What's driving this? Which retailers are prioritising own label over brands? Have branded ranges been further rationalised? If so, who's been hit hardest? And how can brands fight back?

Key Themes

Retailers: This feature will pay close attention to how different retailers are approaching the category and how their strategies are affecting their sales performance. Which retailers have been most aggressive in rationalising their ranges? How have their own label ranges evolved? What are the key differences in terms of promotions, pricing, merchandising and so on?

Sub sectors: We'll be analysing different formats (eg, grated, sliced) and on-the-go products (mini portions are in strong growth). Within this feature we will explore which macro trends and other factors have affected the fortunes of cheese over the past year. How are players looking to sustain growth or turn things around? Which brands have driven mini portions' growth?

Price/promotions: This is a key theme of the feature. How much cheese is sold on promotion? Which retailers and brands are pushing the hardest on promotions? What tactics are they using? How has this changed from 12 months ago?

Own label vs brands: Own label is in growth while brands continue to suffer. Why is this? What are branded players doing to improve their fortunes? How are retailers adding value back into the category with own label?

Life beyond Cheddar: Are consumers exploring other cheeses? What are producers and retailers doing to encourage shoppers to buy outside of Cheddar? What about sales and innovation in Continental cheese? The feature will also look at activity within exotic cheeses (eg Halloumi, Feta and Paneer) and also sheep and goats cheese.

Advertising and marketing: This feature will also investigate how the marketing and advertising strategies of the category's biggest players have evolved over the past year and how they will develop in the coming year to sustain growth or return brands to growth. The top campaigns will be noted along with data.

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

Continental cheese: Continental cheese has seen the biggest growth in value terms over the past year, adding £16.8m to category value. This is coming from own label offerings, as branded falls. What are the drivers behind own label's growth in this arena? Which regions and cheeses are doing well and why? What can branded players do to fight back?

Adult snacking: Cheese snacks used to be aimed primarily at the kids market; in recent years that's begun to change as brands have focused on the development of smaller portions for adults. Who's winning in this area? How much growth is there left?

Blue cheese: In percentage terms, blue cheese has had the strongest growth of the year (though in absolute terms, continental is still king). Why is this? Which brands and retailers have driven this and what are they doing to sustain growth? Are they using deals around seasonal events such as Christmas more?

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?