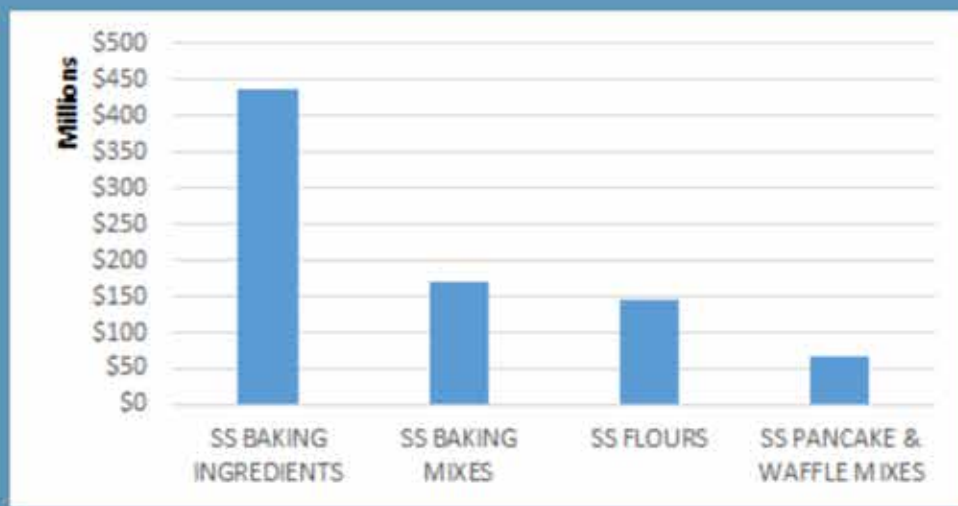


TREND WATCH

NOVEMBER 2019

**CATEGORY
BAKING
SUPPLIES**
WESTERN US MARKET
GROWTH: 2.3%
TOTAL: \$816M

The demand of the Baking Supplies category is thriving across all subcategories on the West Coast. Natural & Specialty are carrying more than double the growth of Conventional brands with \$13M vs. \$5.5M YOY. Consumers are looking for cleaner ingredients. Health focused products like almond flour, whole wheat, corn, xanthum gum, arrowroot and plant-based options like egg replacers are growing across the sub-categories. **Flours and baking ingredients grew the most at \$6M each, while baking and pancake mixes grew almost \$3M each.** Trending diets like paleo, keto, low-carb, gluten-free and dairy-free are without a doubt contributing to the success of many items within baking, as shoppers revamp recipes to fit their needs.



MARKET GROWTH

Conventional

+0.9% | \$5.5M

Natural & Specialty

+11.6% | \$13M

TREND BREAKDOWN - WHAT'S HOT?

INGREDIENTS: Baking Chips, frosting/icing, evap/cond milk, shortening and coconut milk remain the top for demand. Double digit growth is coming from ingredients like xanthum gum, arrowroot (which are both gluten-free alternatives) and egg replacements (plant-based/dairy-free). Other popular ingredients like Cacao and Yeast have increased sales dollars - showing consumers are busy baking their own breads and chocolate treats. New types of baking fats like duck fat from EPIC are also seeing growth.

FLOUR: Wheat and corn flour dominate this sub-category in sales, followed by corn meal and almond flour. Coconut flour still remains in the top 10, but is being overshadowed in growth by rice, oat, spelt and cassava. Although not listed here – keep an eye on both tiger nut (ground from root vegetables and paleo-friendly), and fruit and vegetable flours like banana and cauliflower. In addition to seeing these growing flours in baking, you'll begin to see them used in snack foods as consumers look for additional protein in their baked goods.

BAKING & PANCAKE MIXES: Traditional baking mixes in order by demand like cake, brownie, corn bread, cookies and muffins are still top treats, but baking enthusiasts are reaching for mixes in breakfast areas. Mixes for items like scones, cinnamon rolls and coffee cakes are making their way to shopping carts. Pancake mixes are all about high-protein, gluten-free, paleo-friendly recipes. Brands like Birch Benders, which uses tiger nut in its blend, and Lodi Unbaked that serves up a gluten-free option with lupin and rice flour.

(Growing Brands on Page 2)

SOURCE: SPINScan Conventional Markets/Regions; SC - MKT; Census Regions; WESTERN - US CENSUS REGION - FOOD, Baking Supplies, 52 Weeks ending Sept 8



TRENDING

BAKING SUPPLIES

November 2019



West Coast NOS TOP BRANDS!

BRANDS	SUB-CATEGORY	52 WEEKS \$	CHG YOY %
GHIRARDELLI	SS BAKING INGREDIENTS	\$26,891,457.55	1.3%
BOBS RED MILL	SS FLOURS	\$21,858,477.18	5.6%
MASECA	SS FLOURS	\$19,989,157.23	9.2%
GHIRARDELLI	SS BAKING MIXES	\$10,670,451.22	11.6%
KODIAK CAKES	SS PANCAKE & WAFFLE MIXES	\$9,963,694.65	22.0%
GUITTARD	SS BAKING INGREDIENTS	\$9,262,663.40	3.4%
THAI KITCHEN	SS BAKING INGREDIENTS	\$7,094,393.96	0.2%
BOBS RED MILL	SS BAKING INGREDIENTS	\$4,406,494.07	9.6%
ENJOY LIFE	SS BAKING INGREDIENTS	\$3,806,991.23	18.1%
BIRCH BENDERS	SS PANCAKE & WAFFLE MIXES	\$2,766,459.64	131.3%
BOBS RED MILL	SS BAKING MIXES	\$2,027,327.99	2.8%
BOBS RED MILL	SS PANCAKE & WAFFLE MIXES	\$1,884,425.79	-0.9%
KODIAK CAKES	SS BAKING MIXES	\$1,518,032.37	53.0%
CROSSE & BLACKWELL	SS BAKING INGREDIENTS	\$650,761.92	-9.8%
ARROWHEAD MILLS	SS PANCAKE & WAFFLE MIXES	\$606,172.28	-14.0%



West Coast NOS TOP GROWING BRANDS by \$ growth YOY



























BRANDS	SUB-CATEGORY	52 WEEKS \$	CHG YOY %
KODIAK CAKES	SS PANCAKE & WAFFLE MIXES	\$9,963,694.65	22.0%
MASECA	SS FLOURS	\$19,989,157.23	9.2%
BIRCH BENDERS	SS PANCAKE & WAFFLE MIXES	\$2,766,459.64	131.3%
BOBS RED MILL	SS FLOURS	\$21,858,477.18	5.6%
GHIRARDELLI	SS BAKING MIXES	\$10,670,451.22	11.6%
ENJOY LIFE	SS BAKING INGREDIENTS	\$3,806,991.23	18.1%
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BOBS RED MILL	SS BAKING INGREDIENTS	\$4,406,494.07	9.6%
GHIRARDELLI	SS BAKING INGREDIENTS	\$26,891,457.55	1.3%
GUITTARD	SS BAKING INGREDIENTS	\$9,262,663.40	3.4%
SWERVE	SS BAKING MIXES	\$306,010.53	3,950.9%
EPIC	SS BAKING INGREDIENTS	\$125,081.74	1,554.2%
SWERVE	SS PANCAKE & WAFFLE MIXES	\$63,510.32	4,743.1%
BOBS RED MILL	SS BAKING MIXES	\$2,027,327.99	2.8%
D GARI	SS BAKING INGREDIENTS	\$482,102.95	11.4%
THAI KITCHEN	SS BAKING INGREDIENTS	\$7,094,393.96	0.2%
ARROWHEAD MILLS	SS BAKING INGREDIENTS	\$13,133.84	620.8%
NAMASTE	SS BAKING MIXES	\$387,537.37	2.5%
ENJOY LIFE	SS PANCAKE & WAFFLE MIXES	\$69,469.17	14.3%
SISTERS GOURMET	SS BAKING MIXES	\$15,044.44	55.7%
NAMASTE	SS BAKING INGREDIENTS	\$17,871.55	27.9%































CALL YOUR SALES REP FOR FULL BRAND ASSORTMENTS


BAKING SUPPLIES































NOS Baking Ingredients, Flours & Mixes























SCAN CODE TO SEE IF ITEMS HAVE CURRENT DEALS OR PROMOTIONS

CUST CODE	SCAN CODE	DESCRIPTION	UPC	PACK	SIZE	
80975-6		ANDRE PROST CNDS COC MLK	0-70650-06040	12	16.6 OZ	
67161-0		ANDRE PROST COCO MLK UNSWT	0-70650-06025	12	13.5 OZ	
19242-7		ANNIES MIX BROWNIE BAR	0-13562-47406	8	18.4 OZ	
18820-1		ANNIES ORG BKNG MX DBL CHOC	0-13562-47407	8	18.3 OZ	
18752-6		ANNIES ORG CKI MX CHOC CHIP	0-13562-47409	8	15.4 OZ	
34269-1		ARRWHD BRWNI MX WHT FREE	0-74333-37193	6	17.5 OZ	
25997-8		BANH TRANG SPRING ROLL SKIN	7-38055-51641	1	12 OZ	
80092-0		BOB RD ML BKNG PWDR	0-39978-03392	6	14 OZ	
80094-6		BOB RD ML BKNG SODA	0-39978-03391	6	16 OZ	
38108-7		BOB RD ML BRD MX 10 GRAIN	0-39978-00672	4	19 OZ	
49867-5		BOB RD ML BTRMLK PWR SWT CRM	0-39978-00521	4	24 OZ	
80095-3		BOB RD ML COCO FLK UNSWT	0-39978-03581	4	10 OZ	
80096-1		BOB RD ML COCO SHRD UNSWT	0-39978-02578	4	12 OZ	
69860-5		BOB RD ML CRNBRD MX	0-39978-00222	4	24 OZ	
19818-4		BOB RD ML EGG REPLACER	0-39978-00545	4	16 OZ	
65847-6		BOB RD ML GF BKNG MX WHEAT FR	0-39978-00205	4	24 OZ	
61451-1		BOB RD ML GF BRD MX CIN RAISN	0-39978-00456	4	22 OZ	
12128-5		BOB RD ML GF BRD MX CORN	0-39978-00461	4	20 OZ	
61435-4		BOB RD ML GF BRD MX HOMEMADE	0-39978-00454	4	16 OZ	
34424-2		BOB RD ML GF BRD MX HRTY WHL	0-39978-00455	4	20 OZ	
72133-2		BOB RD ML GF BRWNI MX	0-39978-00464	4	21 OZ	
71411-3		BOB RD ML GF CKE MX CHOC	0-39978-00468	4	16 OZ	
11406-6		BOB RD ML GF CKE MX VAN	0-39978-00466	4	19 OZ	
71409-7		BOB RD ML GF CKI MX CHOC CHIP	0-39978-00467	4	22 OZ	
80097-9		BOB RD ML GF POTATO STARCH	0-39978-02525	4	22 OZ	
72137-3		BOB RD ML GF PZA CRUST MX	0-39978-00394	4	16 OZ	

24497-0		BOB RD ML GF TVP HI PROTN	0-39978-02542	4	10 OZ
80102-7		BOB RD ML GF XANTHAN GUM	0-39978-03555	6	8 OZ
41428-4		BOB RD ML MLK PWDR FF	0-39978-02520	4	22 OZ
80091-2		BOB RD ML ORG FLR ARRWROOT	0-39978-02505	4	16 OZ
29842-2		BOB RD ML PWDR TOSTD	0-39978-02509	4	18 OZ
29801-8		BOB RD ML WHEAT GERM NTRL RW	0-39978-01150	4	12 OZ
11435-5		BOB RD ML WHET BRAN	0-39978-01321	4	8 OZ
18106-5		CHAOKAN CCNT MLK	0-44738-01843	24	13.5 OZ
77669-0		CRSS& BLKWL MINCEMEAT PLAIN	0-51500-28684	12	29 OZ
44726-8		CRSS& BLKWL MINCEMEAT R&B	0-51500-28682	12	29 OZ
62396-7		D'GARI GLTN DSSRT CNDS MLK	7-35257-01349	24	4.2 OZ
01692-3		D'GARI GLTN DSSRT UNFLAVORED	7-35257-90233	24	1 OZ
57099-4		ENJY LF GF CHIPS MINI SEMI SWT	8-53522-00030	12	10 OZ
04349-7		ENJY LF MEGA CHNK SEMI SWT	8-53522-00031	12	10 OZ
57100-0		ENJY LF MORSELS DK CHOC	8-19597-01021	12	9 OZ
83101-6		EPIC BEEF TALLOW GRASS FED	7-32153-02473	6	11 OZ
39433-8		EPIC OILS TRAD PORK FAT	7-32153-02481	6	11 OZ
12894-2		EPIC OILSTRAD DUCK FAT	7-32153-02475	6	11 OZ
18745-0		FRONTIER VAN FLVR ORG	0-89836-23190	1	2 OZ
24948-2		FRONTIER VAN FLVR ORG	0-89836-23191	1	4 OZ
25176-9		FRONTIER VANILLA EXTRACT	0-89836-23187	1	2 OZ
11736-6		GLTNO GF PNTRY BRWNI MX DBLCHC	7-37880-06130	6	16 OZ
15711-5		GLTNO GF PNTRY PIE CRUST MX	7-37880-96055	6	16 OZ
45129-4		HDGSN ML BRD MX WHT	0-71518-00806	1	16 OZ
45124-5		HDGSN ML GBRD MX	0-71518-00005	6	15 OZ
16108-3		HDGSN ML GF BRWNI MX	0-71518-02140	6	15 OZ
16105-9		HDGSN ML GF CHOC CKE MX	0-71518-02135	6	15 OZ
59804-5		HDGSN ML GF SWT CRNBRD MX	0-71518-02103	6	12 OZ
16102-6		HDGSN ML GF YLW CKE MX	0-71518-02130	6	15 OZ
43889-5		HDGSN ML NINE GRNBRD MX	0-71518-00805	6	16 OZ

19156-9		HDGSN ML NON-GMO CORN STARCH	0-71518-02101	6	8 OZ
45119-5		HDGSN ML PURE CRN STRCH	0-71518-09001	12	16 OZ
45138-5		HDGSN ML WHET BRAN	0-71518-01018	1	12 OZ
44589-0		HDGSN ML WHLWHET INSTA-BK	0-71518-02020	6	32 OZ
45132-8		HDGSN ML YEAST ACTV DRY	0-71518-00001	1	.75 OZ
49203-3		HDGSN ML YEAST FAST RISING	0-71518-50004	1	.5 OZ
22988-0		J BASKET COCONUT MILK	0-11152-45343	8	13.5 OZ
55059-0		JANS SWTCOW CNDSO CRM	8-38452-00353	24	13.23 OZ
69461-2		JANS SWTCOW EVPRDMLK FILD MLK	8-38452-00495	24	12 FO
90948-1		KNRR MZNA DRNK MIX UNFLAVORED	0-48001-71127	24	14.1 OZ
06371-9		KODIAK CAK BG BEAR BRWNI	7-05599-01118	6	17.72 OZ
81222-2		KODIAK CAKE BLUEBERRY MFN	7-05599-01314	6	14 OZ
812223		KODIAK CK DBCHC MFMX14Z	7-05599-01234	6	14 OZ
80911-1		KODIAK MINUT DBL DRK CHOC MFN	7-05599-01155	12	2.29 OZ
80910-3		KODIAK MINUTE BLUBRY MFN MNTN	7-05599-01151	12	2.29 OZ
34332-7		LA FF COBBLER MX	0-39156-00201	12	10.5 OZ
95109-5		LA LECHERA MLK CNDSO SWTND	0-28000-51780	24	14 OZ
42797-1		LA LECHERA SWTND CNDSO MLK FF	0-19665-00248	24	14 OZ
20255-6		LA LECHERITA CNDSO MLK 6 PK	0-28000-51790	36	3.5 OZ
80706-5		M&B ARROWROOT	0-16291-22702	3	1.4 OZ
16087-9		M&B ORG VAN XTRACT	0-16291-44280	3	4 OZ
10231-9		M&B PURE ALM XTRACT	0-16291-44181	3	4 OZ
78902-4		M&B PURE ALM XTRACT	0-16291-44581	3	2 OZ
30082-2		M&B PURE VAN XTRACE	0-16291-44180	3	4 OZ
78367-0		M&B PURE VAN XTRACT	0-16291-44580	3	2 OZ
19740-0		MANISCH FRT SLCS GIFT PK TRAY	0-72700-00773	12	8 OZ
27228-6		MANISCH POT STRCH	0-72700-05608	12	16 OZ
54739-8		MANISCH TEND COCO PATTI	0-72700-10296	12	5 OZ
31600-0		MOLINA VAN EXTRACT MEXCN BLND	0-40811-07050	12	8.3 OZ
89579-7		MOLINA VANILLA	0-40811-07020	12	4 OZ

89587-0		MOLINA VANILLA	0-40811-07070	12	33.7 OZ
92087-6		NIDO FULL CRM MLK PWDR FORTIFT	0-28000-14484	6	12.7 OZ
92172-6		NIDO FULLCRM MLKPWDRFORTIFIED	0-28000-71329	12	28.1 GR
34480-4		NIDO MLK DRY FORTIFICADA	0-28000-71328	6	3.52 LB
14645-6		NMSTE GF BLONDIE MX	8-50403-00002	6	30 OZ
16591-0		NMSTE GF BRWNI MX	8-50403-00001	6	30 OZ
17455-7		NMSTE GF CKE MX CHOC	8-50403-00007	6	26 OZ
65286-7		NMSTE GF CKE MX SPC CRT	8-50403-00006	6	26 OZ
15875-8		NMSTE GF MFN MX	8-50403-00004	6	16 OZ
14651-4		NMSTE GF NO SGR ADD MFN MX	8-50403-00009	6	14 OZ
15803-0		NMSTE GF PZA CRUST MX	8-50403-00003	6	16 OZ
35350-8		NO PUDG FF BRWNI MX ORIG	7-08758-00101	6	13.7 OZ
48949-2		NONSCH MINCEMEAT CONSDSD	0-51500-20476	12	9 OZ
51693-0		NONSCH MINCEMEAT I/O	0-51500-20472	12	27 OZ
51719-3		NONSCH MINCEMEAT R&B	0-51500-20474	12	27 OZ
32813-8		NSTL MEDIA CREMA TABLE CRM	0-28000-51720	24	8 OZ
66423-5		ODENSE ALM PSTE	0-70650-00006	12	7 OZ
87947-8		ODENSE MARZIPAN	0-70650-00005	12	7 OZ
92131-2		PARROT SWTENED COND CCNT MLK	0-22652-16088	12	11.6 OZ
38759-7		REESE LG PEARL TAPIOCA	0-70670-00401	6	7 OZ
83097-6		REESE TAPIOCA INSTNT GRANLTD	0-70670-00955	6	8 OZ
48894-0		REESE TAPIOCA-SM PEARL	0-70670-00400	6	8 OZ
44615-3		RLND CCNT MLK	0-41224-86002	24	15 OZ
07148-0		RLND CRM OF CCNT	0-41224-71240	1	15 OZ
88306-6		RLND LITE CCNT MLK	0-41224-86012	24	14 OZ
13565-7		SPC ISL VAN XTRA PURE	0-40100-00391	3	2 OZ
15794-1		SPCTRM ORG SHRTNG ALL VEG	0-22506-10260	12	24 OZ
81320-4		SWERVE GF CAKE GRNFR KETO CHO	8-52700-30002	6	10.6 OZ
81319-6		SWERVE GF CAKE GRNFR KETO VAN	8-52700-30001	6	11.4 OZ
81322-0		SWERVE GF CKI GRN FR CHOC CHI	8-52700-30003	6	9.3 OZ

89170-5		TAMPICO COCONT SHRDDDED	0-76549-30045	12	2.5 OZ
33899-6		TAMPICO CORN HUSK HOJA ENCHOCH	0-76549-30075	12	16 OZ
26952-2		TAMPICO CORN HUSK HOJA ENCHOCH	0-76549-30022	12	8 OZ
40830-2		THI KIT CCNT CRM	7-37628-01092	6	13.66 OZ
33947-3		THI KIT CCNT MLK	7-37628-01150	12	14 OZ
33948-1		THI KIT CCNT MLK - LI	7-37628-01160	12	14 OZ
12657-3		THI KIT ORG COCO MLK LITE	7-37628-08250	12	13.66 OZ
12636-7		THI KIT ORG PREM CCNT MLK	7-37628-07950	12	13.66 OZ
48289-3		TONES FD COLOR KTCHNS	0-41351-52044	1	1.2 OZ
25147-0		TONES VAN IMITATION	0-41351-52023	1	8 OZ
17865-7		TORANI SYRP SGR FR HZLNUT CLSC	0-89036-43144	4	12.7 OZ
13233-2		TORANI SYRP SGR FR RSPBRY 12.7	0-89036-43150	4	12.7 FO
15954-1		TORANI SYRP SGR FR VAN 12.7 Z	0-89036-43130	4	12.7 OZ
18412-7		TRES ESTRELLAS CHURROS MIX	6-13522-02101	12	16.7 OZ
66477-1		TSTE O THI CCNT MLK	0-70650-80012	12	13.5 OZ
66478-9		TSTE O THI CCNT MLK LT	0-70650-80013	12	13.5 OZ
63839-5		TYLR&CLDG ALM XTRACT PSTE	8-58944-00500	8	1.4 OZ
14619-1		TYLR&CLDG CCNT XTRACT PSTE	8-58944-00501	8	1.4 OZ
13818-0		TYLR&CLDG LEMON EXTRACT PASTE	8-58944-00503	8	1.4 OZ
34864-9		TYLR&CLDG LVNDR EXTRACT PASTE	8-58944-00502	8	1.4 OZ
16067-1		TYLR&CLDG ORG VANILLA PASTE	8-58944-00505	8	1.7 OZ
23816-2		TYLR&CLDG PPRMNT EXTRACT PASTE	8-58944-00504	8	1.4 OZ