Food Accelerators
GROWING MAINE'S FOOD ECONOMY

Retail Shelf Stable Baking Mixes, Ingredients & Flour Category & Subcategory Report

May 2024

MAINE CENTER FOR ENTREPRENEURS

Project Overview

Report Purpose
This report was created to assist businesses selling in the Shelf Stable Baking Mixes, Ingredients, and Flour category better understand the markets for their products and target new markets in the United States. Data presented in this report is intended to provide greater detail on consumer purchasing trends for products in this category.

Included in this report:
This report provides market dynamics for each product subcategory within the Shelf Stable Baking Mixes, Ingredients, and Flour category, delivering detailed insights into sales performance across diverse channels and US Census territories. Within this expanding category, the report covers four primary subcategories: Baking Ingredients, Baking Mixes, Flours, and Pancake & Waffle Mixes.

Despite most sales being attributed to the Multi-Outlet (MULO) channel, this report also includes a breakdown of sales in the Natural Channel, to address the prominence of emerging Maine food & beverage producers active in Natural and Specialty markets. Additionally, the report highlights the performance of leading brands within the Northeast Census region, a typical entry point for Maine producers.

Data
All data in this report is derived from the **SPINS Satori Database** and refers to the 52 weeks ending December 31, 2023 unless otherwise noted.

Project Team and Project Funding
This report was completed by the Maine Center for Entrepreneurs in partnership with Camoin Associates. Work was completed as a part of the larger body of work under the Domestic Trade Pilot Program, commissioned by the Maine Office of Business Development and funded in part by the Maine Jobs and Recovery Plan.

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How to Use This Report

Size of Market
These details and subcategory performance information are valuable for a sales or pitch deck. Generally, businesses and investors find it helpful to understand the overall size of the category and subcategories to **measure the health of a particular category and the scope of opportunities within it.** Details about market sizing can be found in Section III.

Growth of Market
Each section of this report shows how the category or subcategory is growing in the Multi-Outlet Channel and Natural Channel, and which geographic areas are growing faster than others. This information helps companies think strategically about **which retail channels offer the best opportunities** for growth in the category and subcategories and **which regions represent the best prospects**.

Top 10 Brands in the Northeast Region
Most Maine companies start their retail development locally and then build out regionally and nationally. Companies can leverage this information to **identify the top-performing brands, how they are performing in sales dollars and units sold, and how your brand is performing against them.**

Average All Commodity Volume (ACV)
This represents a weighted measure of product availability or distribution based on total store sales. High values indicate the brand is performing well, while low values indicate an opportunity for brand distribution growth or a more optimized market share. **This can help a company understand which brands are performing well or lack distribution.**

Average Retail Price in the Top 10 Brands
helps companies understand retail pricing trends. Note that most retail brands showed pricing growth due to inflation. This information **can be used in sales reports as a comparative analysis against performance in the subcategory**. This data reflects the point of sale and scanned price for the brand's products, including discounts at the register. It does not provide pricing for individual SKUs, which should be reviewed when making pricing and pack size decisions.

Other Uses
This data can direct a company's business development efforts. Suppose a certain channel and location have experienced strong growth. In that case, identifying best-fit retailers in those locations and connecting with relevant distributers and brokers can be worthwhile. **Again, indicating the growth of a channel or geography can be a useful reference point to include in a sales or pitch deck.**

Executive Summary

Shelf Stable (SS) Baking Mixes, Ingredients, and Flour is valued at $9 billion in retail sales in the United States

The product category grew 8.8% annually in 2023 and grew in all US Census regions. The South led in sales volume at $3.6 billion and demonstrated the highest growth rate at 9.7%.

All primary subcategories, including Baking Ingredients, Baking Mixes, Flours, and Pancake & Waffle Mixes, have shown positive sales growth in the US, with growth rates ranging from 5.5% to 13.8%. SS Baking Ingredients emerges as the most significant subcategory, accounting for $4.76 billion in sales, while SS Flours has recorded the highest percentage growth year over year, particularly in the West region - showing a remarkable 14.7% increase.

It is important to consider that the inflationary trends of 2023 have been a contributing factor to the reported sales growth, potentially affecting the true scale of market expansion.

SPINS Satori Data

52 Weeks Ending **December 31, 2023**

Shelf Stable (SS) Baking Mixes, Ingredients & Flour

- **Category**
- **Sub-Categories** *(Baking Ingredients, Baking Mixes, Flours, and Pancake & Waffle Mixes)*

Channels:

MULO "Multi Unit Location Outlet" - includes Food/Grocery, Drug, Mass Merchandisers, Walmart, Club Stores (BJs and Sam's), Dollar Stores (Dollar General, Family Dollar, Fred's Dollar), Military DECA (commissaries)

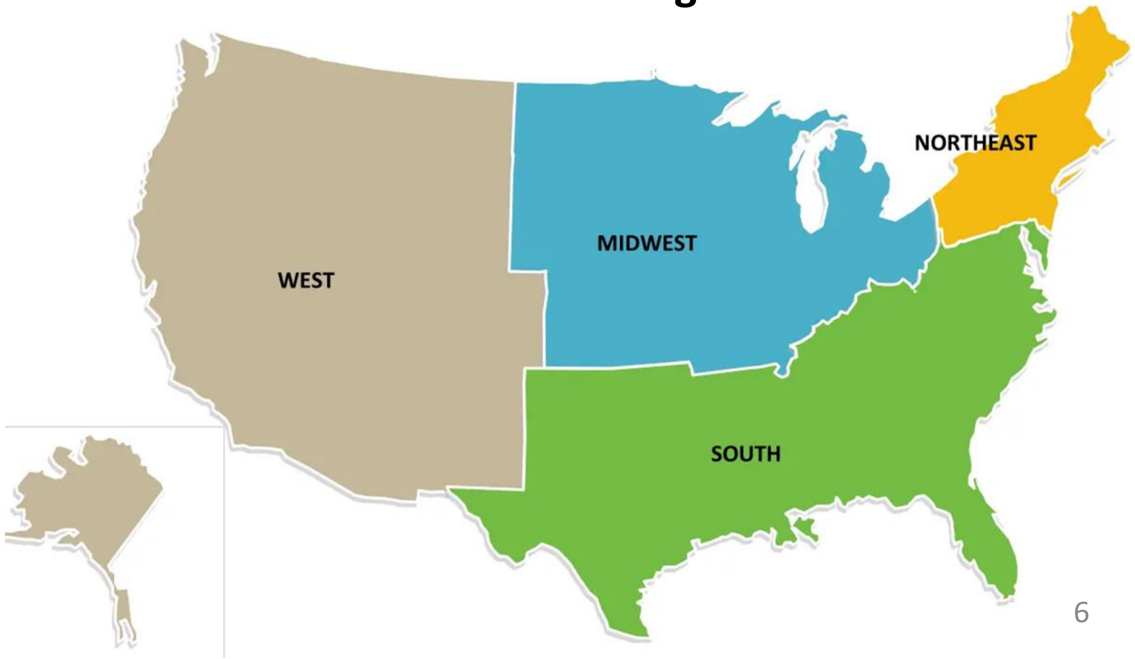
Natural - includes full-format stores with $2 million+ in annual sales and 40% or more of UPC coded sales from natural/organic/specialty products. Includes co-ops, associations, independents, large regional chains (excludes Whole Foods & Trader Joes).

SPINS®

SPINS Syndicated Retail Data

The data included in this report is from **SPINS Satori Database** and includes Retail Scan Data for the Natural sales channel and Multi Unit Location Outlets (MULO). SPINS is focused mainly on the health and wellness ecosystem and addresses the growing niche landscapes of natural, specialty, alternative, and gourmet product retailers. SPINS partners with IRI to provide MULO data.

US Census Regions



Additional Terms & Definitions

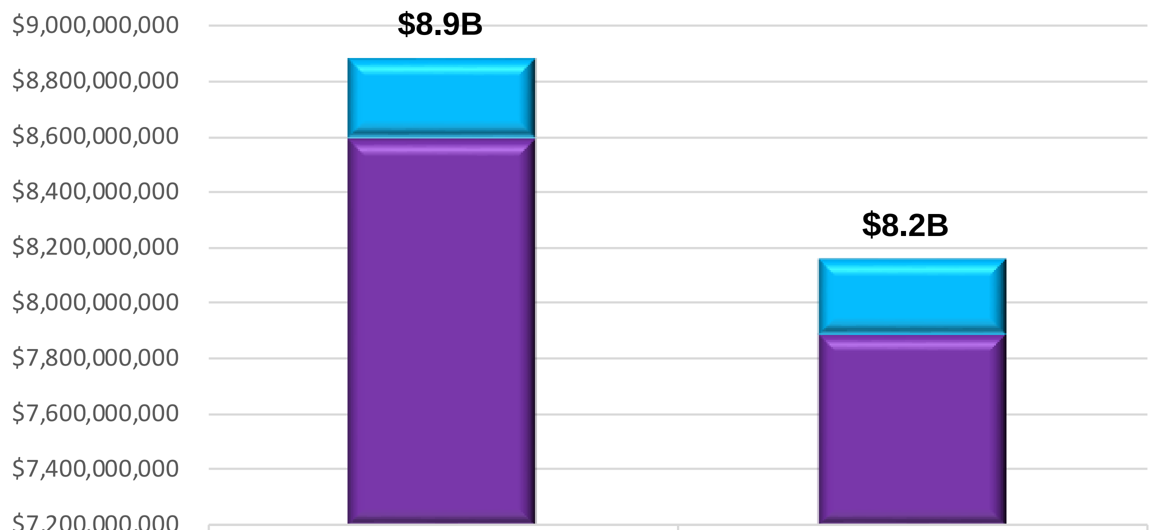
Term	Definition
Dollars	Total dollar sales of a product or group of products in the time frame indicated.
Dollars, Yago	Dollars sold over the same time period a year ago.
Dollars +/- Chg, Yago	The positive or negative dollar change for products sold in year reported, versus previous year.
Dollars % Chg, Yago	The positive or negative percent change of dollars sold in year reported, versus the previous year.
Units	Total unit sales of a product or group of products.
Units, Yago	Units sold over the same time period a year ago.
Units +/- Chg, Yago	The positive or negative units change for units sold in year reported, versus previous year.
Units % Chg, Yago	The positive or negative percent change of units sold in year reported, versus previous year.
AVG ACV	This Average All Commodity Volume measure is an average of a product's distribution weighted by the store size (ACV) across all weeks in a time period in which the product was distributed.
Average Items Selling	This is the number of items, on average, that a retailer carries of a category, segment or brand. e.g. if a brand is made of 7 different items (skus), the average store that carries the brand at all may have 4.
ARP	The Average Retail Price reports the average product unit price.
ARP, Yago	Average Retail Price over the same time period a year ago.
ARP +/- Chg, Yago	The positive or negative dollar change for average retail pricing in year reported, versus previous year.

Shelf Stable Baking Mixes, Ingredients & Flour **Category Performance**

SPINS Satori - 52 Weeks Ending December 31, 2023

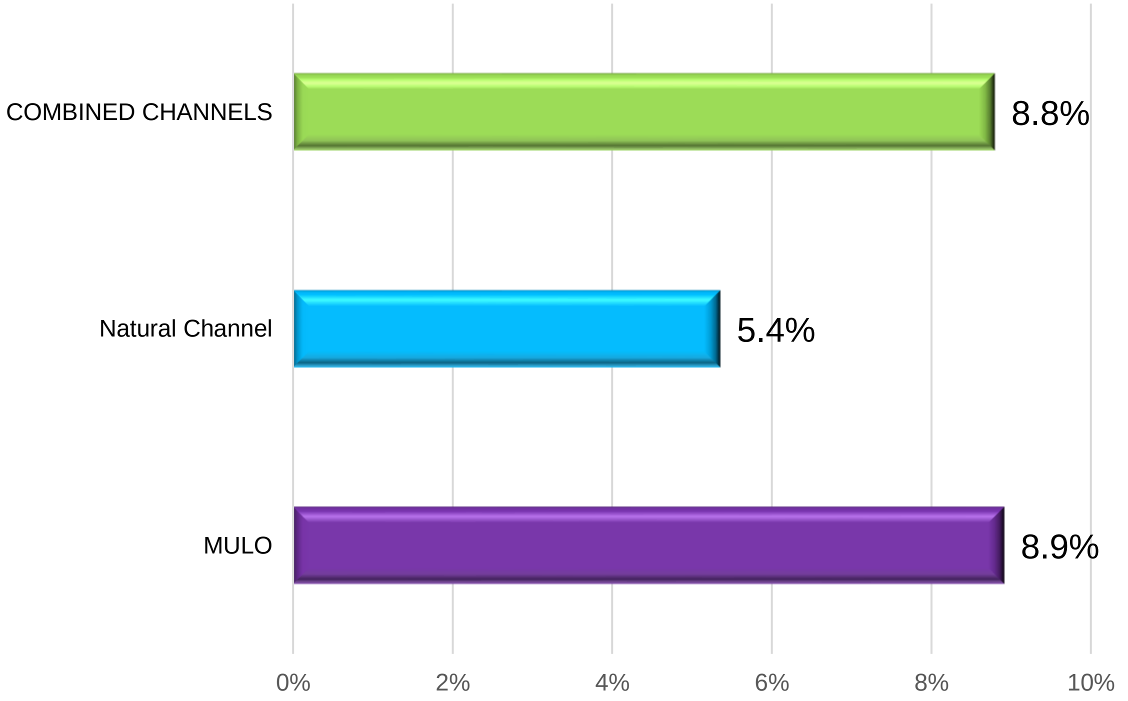
Total US Shelf Stable Baking Mixes, Ingredients & Flour Category

Total US Dollars



	2023	2022
Natural	$285,373,382	$270,864,697
MULO	$8,596,314,173	$7,892,648,931

% Dollar Change vs Year Ago

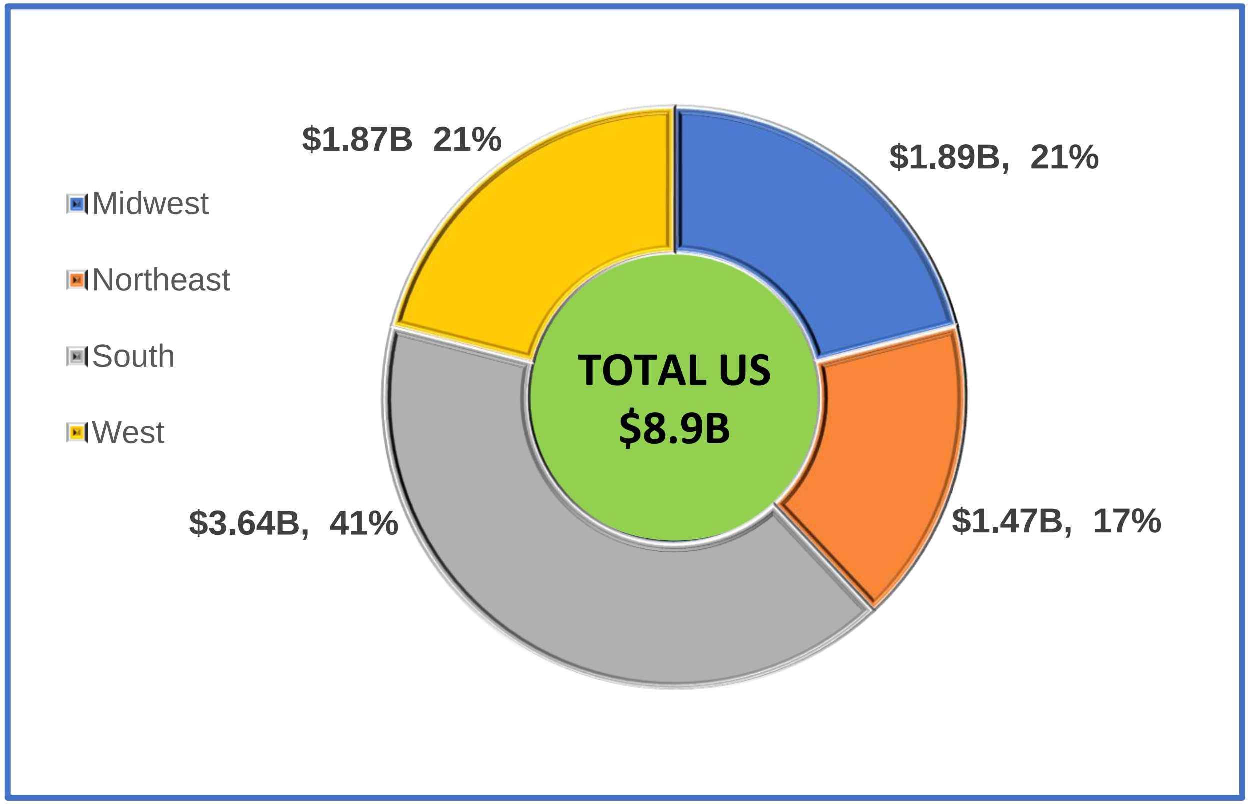


- The Total US Shelf Stable Baking Mix, Ingredients and Flour Category is an $8.9B category and is performing better than prior year by a healthy 8.8%.
- Sales dollars were up in both the Natural Channel (+5.4%) and MULO (+8.9%).
- As in most categories, MULO represents most category sales.

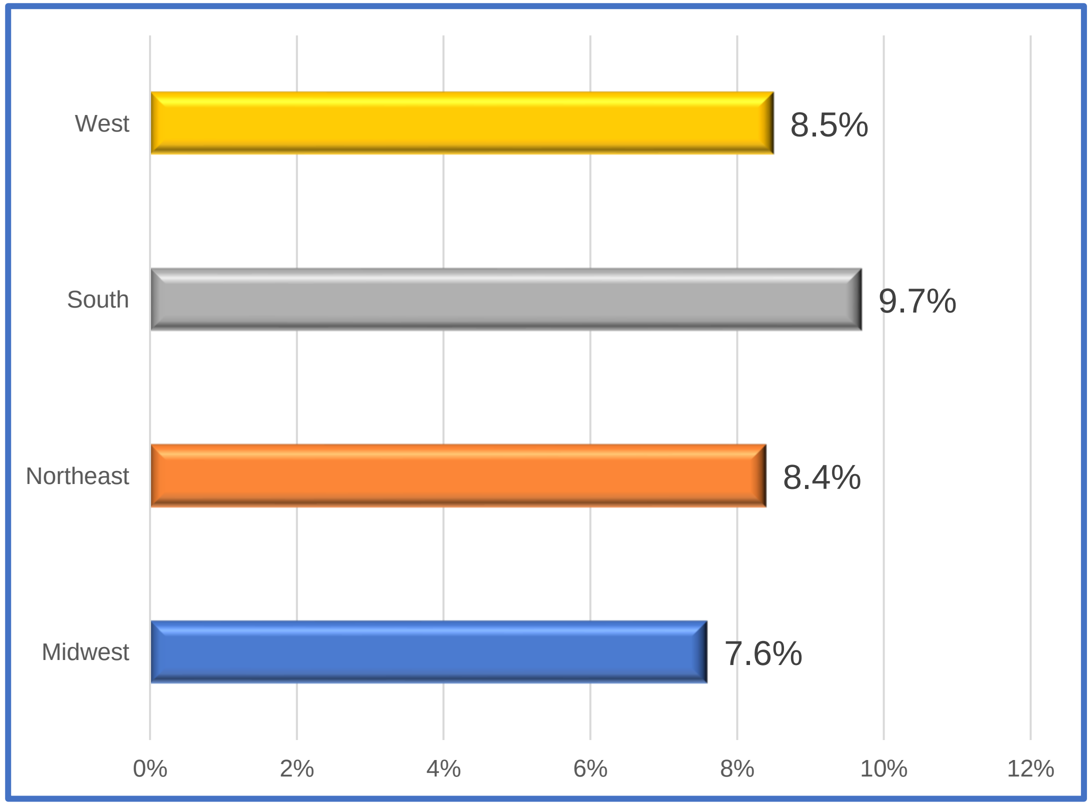
SPINS Satori – 52 weeks ending 12-31-23

Total US Shelf Stable Baking Mixes, Ingredients & Flour Category – By Region

Total Dollars and % Category Share by Region



% Dollars Change vs Year Ago

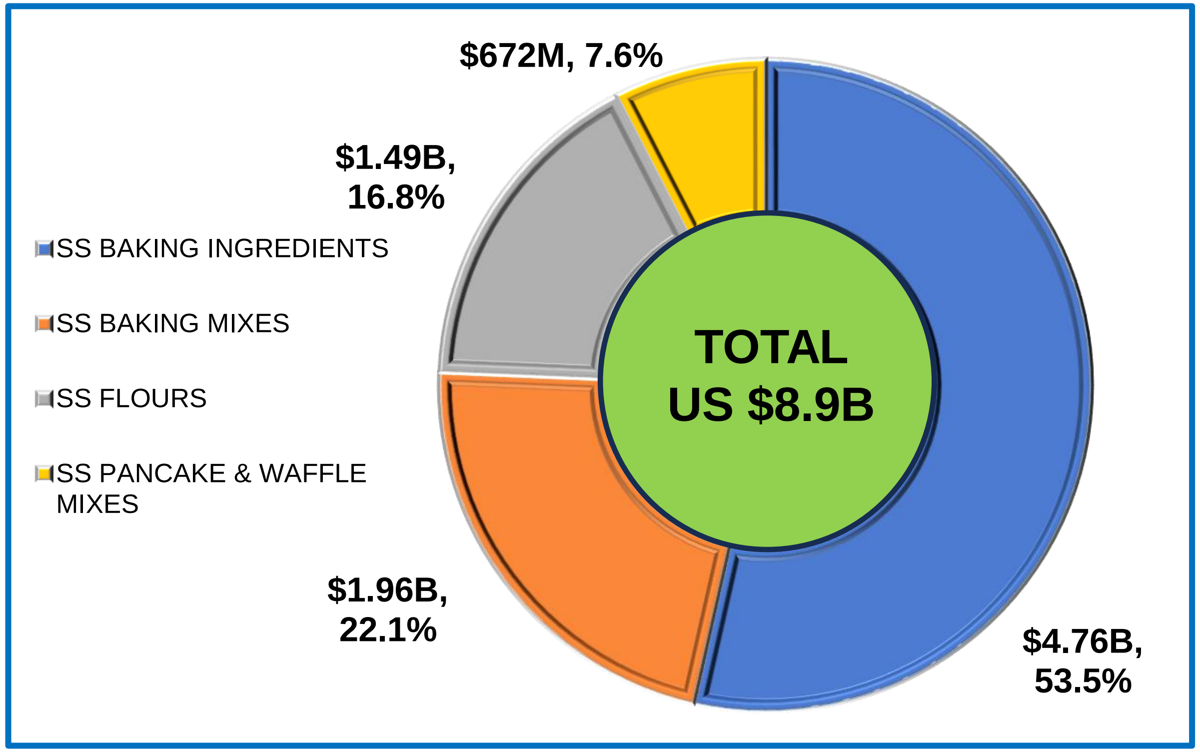


- The South represents 41% ($3.64B) of total category sales dollars, followed by Midwest (21%), West (21%) and the Northeast (17%).
- All 4 regions experienced growth over the prior year.

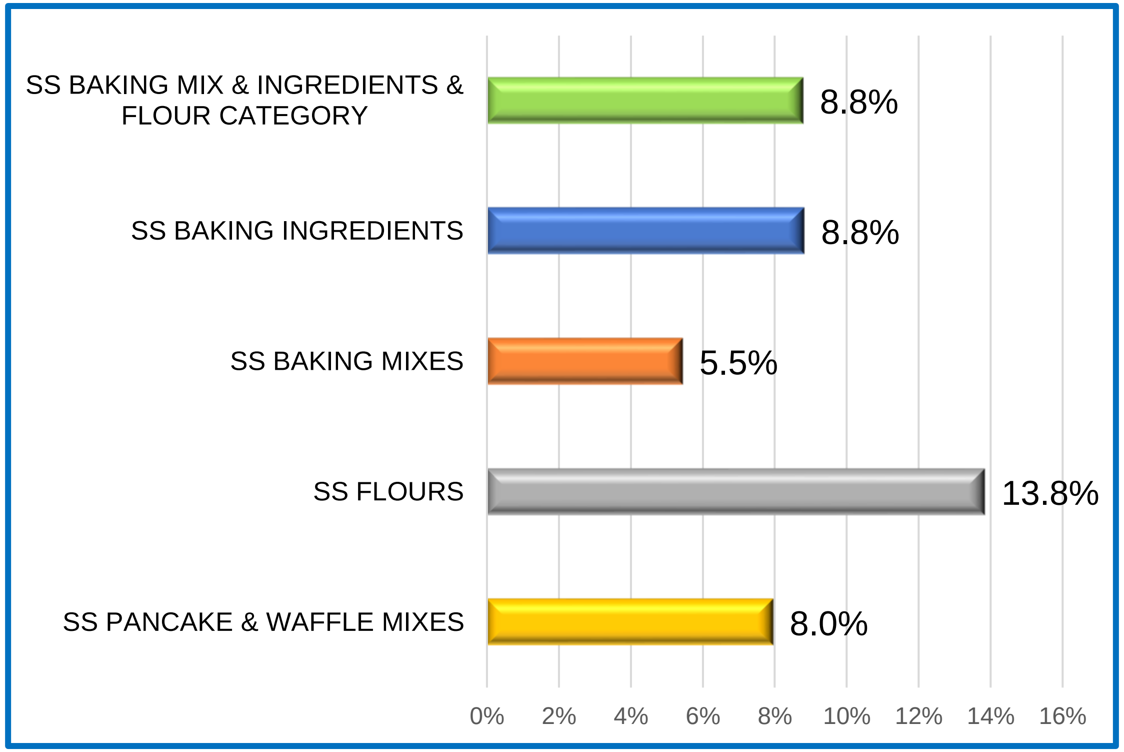
SPINS Satori – 52 weeks ending 12-31-23

Total US Shelf Stable Baking Mixes, Ingredients & Flour Category - By Subcategory

Total Subcategory $ and % Category Share



% Dollar Change vs Year Ago

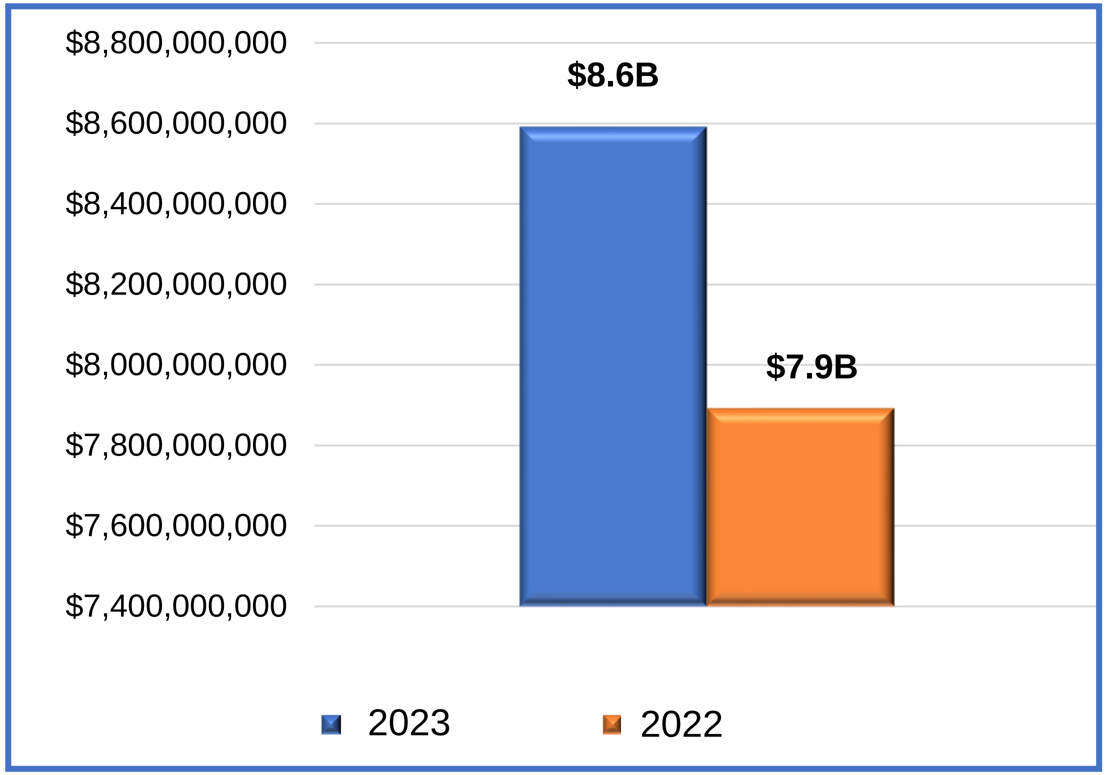


- The SS Baking Mixes, Ingredients & Flour Category is made up of 4 Subcategories: *Baking Ingredients, Baking Mixes, Flours, and Pancake & Waffle Mixes.*
- SS Baking Ingredients is the largest of the 4 subcategories representing $4.76B and 53.5% of total category sales. Baking Ingredients dollars grew 8.8% over prior year.
- The SS Flours subcategory experienced the largest % growth over prior year, up 13.8%.

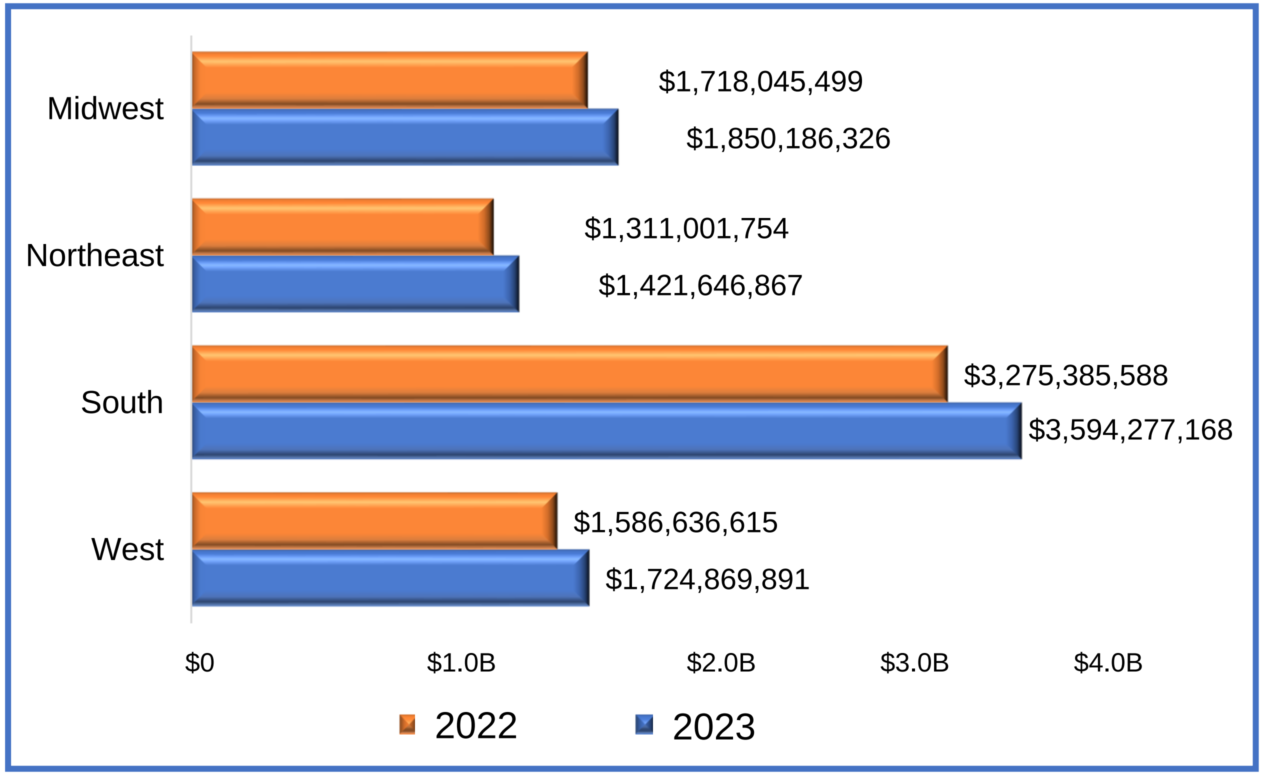
SPINS Satori – 52 weeks ending 12-31-23

MULO: Shelf Stable Baking Mixes, Ingredients & Flour Category

MULO Dollars



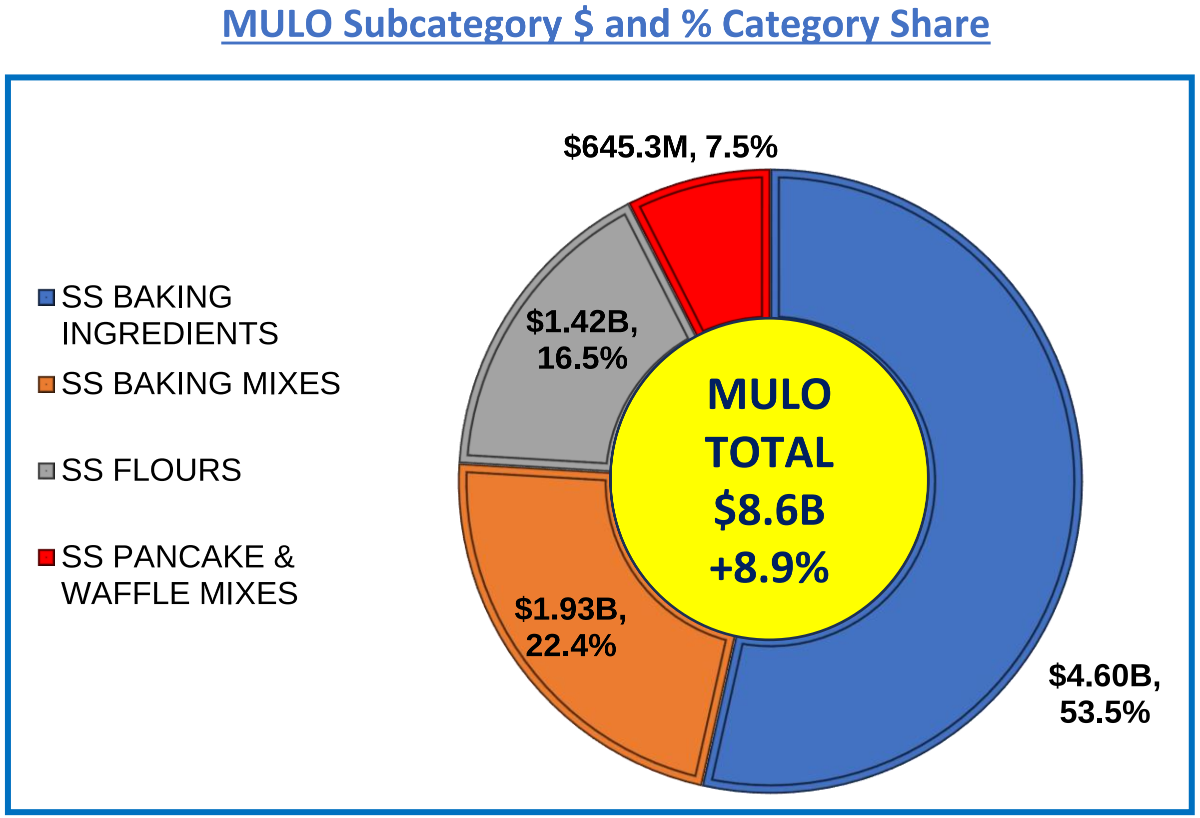
Dollar Change vs Year Ago by Region

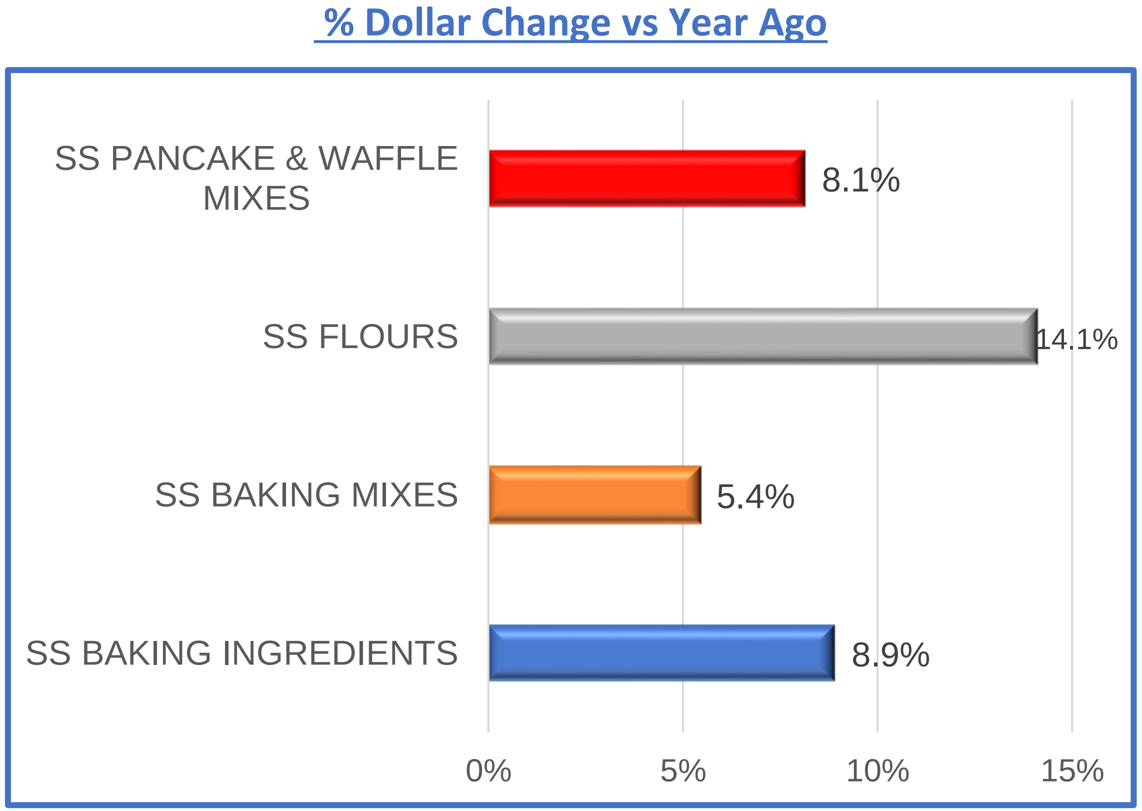


- Total US MULO dollar volume for the category is $8.6B and is performing better than prior year by a healthy 8.9%.
- The South region is the largest $ volume region, representing 41.9% of total MULO sales, followed by Midwest, West and Northeast, respectively.
- All 4 regions and Total US are posting sales that are greater than prior year.

SPINS Satori – 52 weeks ending 12-31-23

MULO: Shelf Stable Baking Mixes, Ingredients & Flour Category – By Subcategory



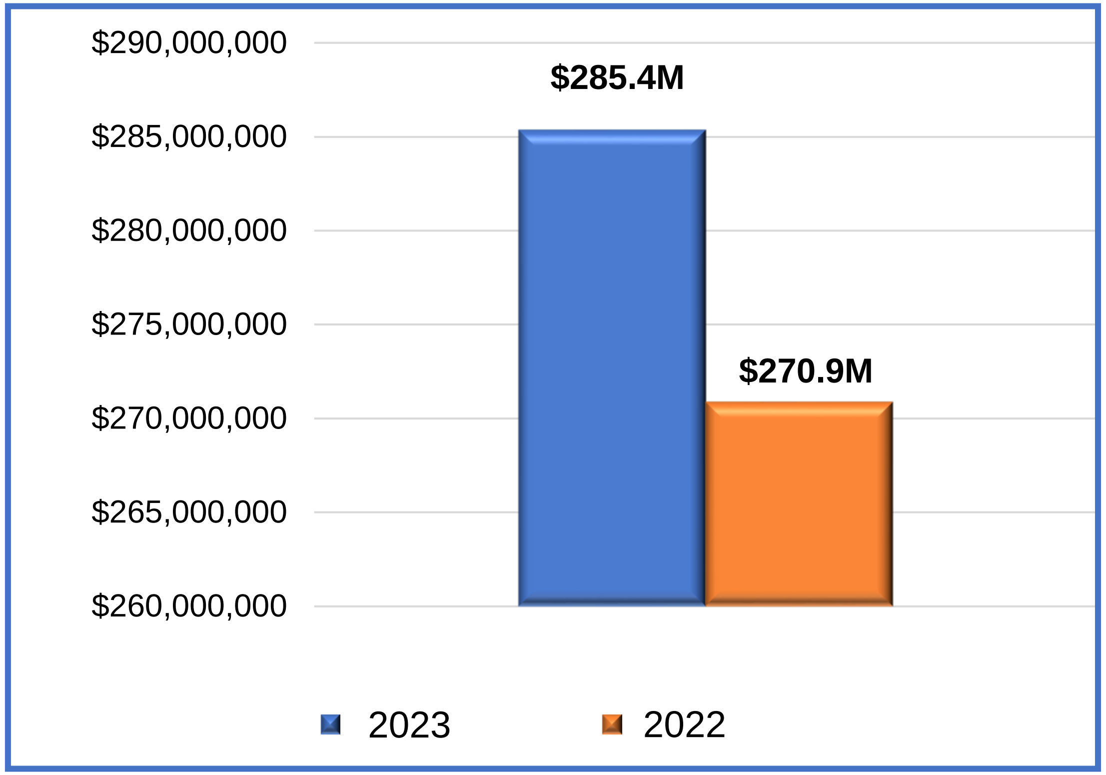


- SS Baking Ingredients is the largest subcategory, representing $4.6B, or 53.5% of total MULO $ volume, with growth of 8.9%.
- SS Baking Mixes, Flours & Pancake & Waffle Mixes represent the remainder of category volume and are all growing appreciably over prior year.
- SS Flours, 16.5% of the category, leads the category sub-segment in growth with 14.1% growth in $ volume, year over year in MULO.

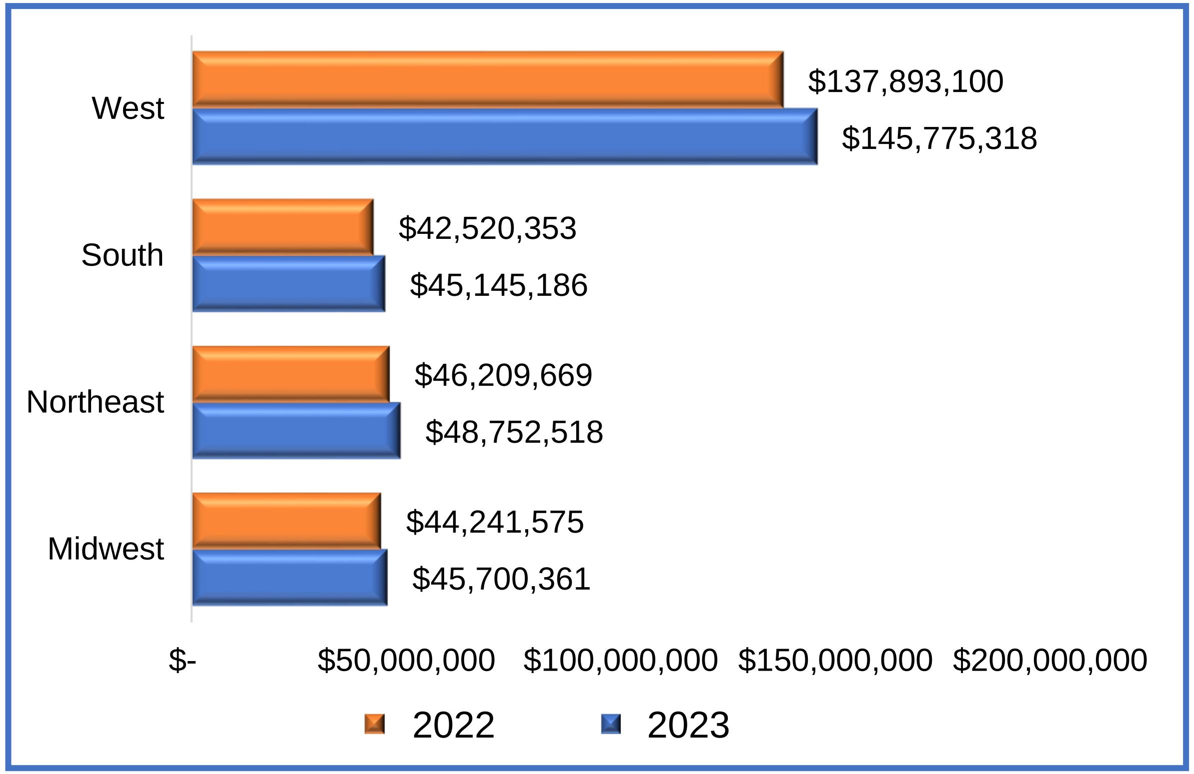
SPINS Satori – 52 weeks ending 12-31-23

Natural Channel: Shelf Stable Baking Mixes, Ingredients & Flour Category

Natural Channel Dollars



Dollar Change vs Year Ago by Region

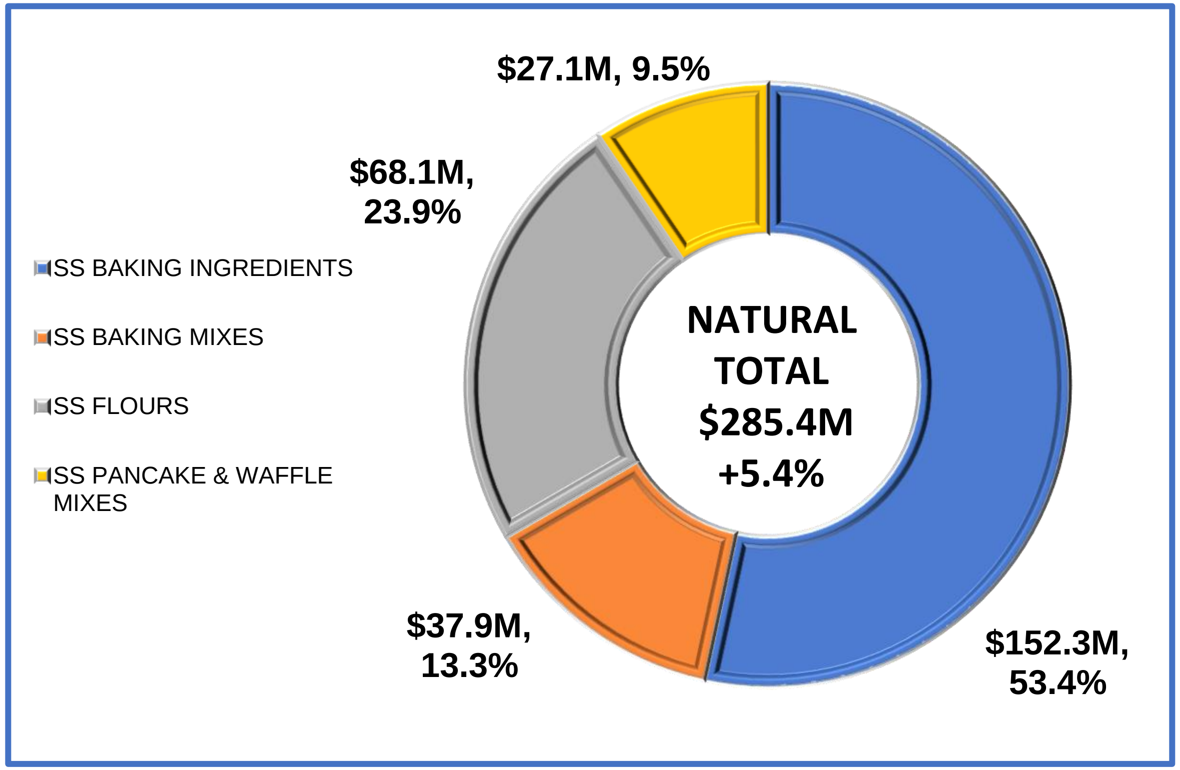


- Natural Channel $ volume for the category is $285.4M and has grown 5.4% over prior year.
- The West region is the largest $ volume region, representing 51% of total Natural Channel category sales, followed by Northeast, Midwest & South regions, respectively.
- All 4 regions and Total US are posting sales that are greater than prior year.

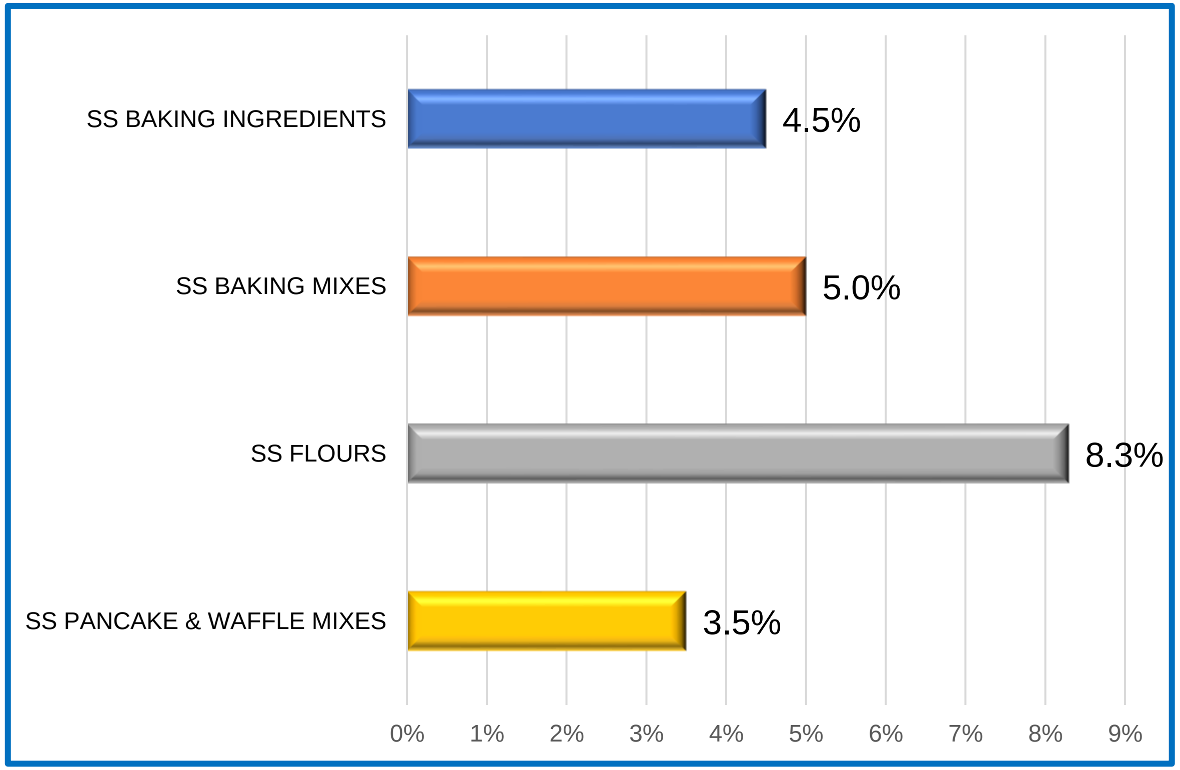
SPINS Satori – 52 weeks ending 12-31-23

Natural Channel: Shelf Stable Baking Mixes, Ingredients & Flour Category – By Subcategory

Natural Channel Subcategory $ and % Category Share



% Dollar Change vs Year Ago



- SS Baking Ingredients is the largest segment in the Natural Channel, representing 53.4% of sales $.
- SS Flours is the 2nd largest segment in the Natural Channel, at 23.9% of $ volume, with the highest growth of all 4 subcategories at 8.3%.

SPINS Satori – 52 weeks ending 12-31-23

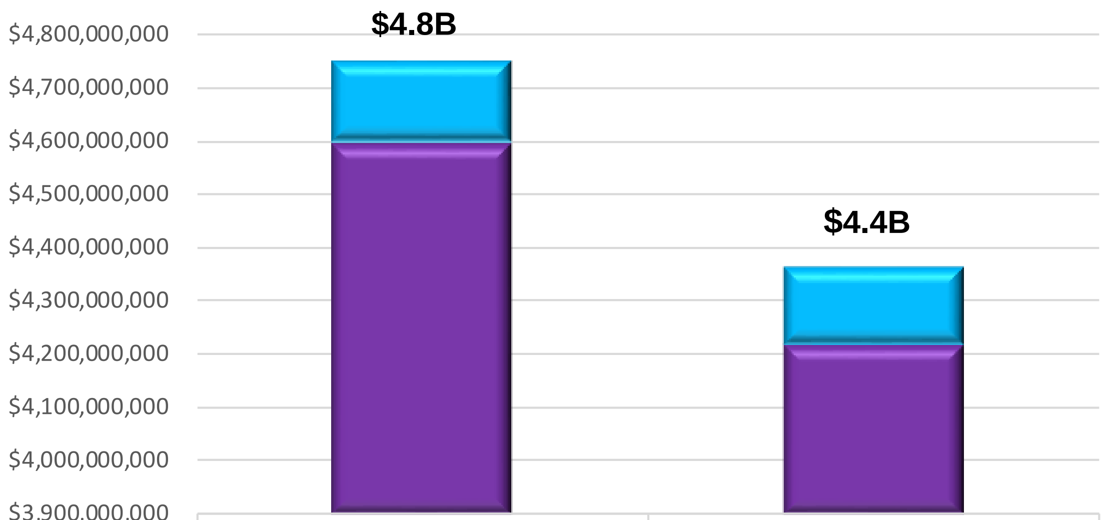
Subcategory Performance

Shelf Stable Baking Ingredients

SPINS Satori - 52 Weeks Ending 12-31-23

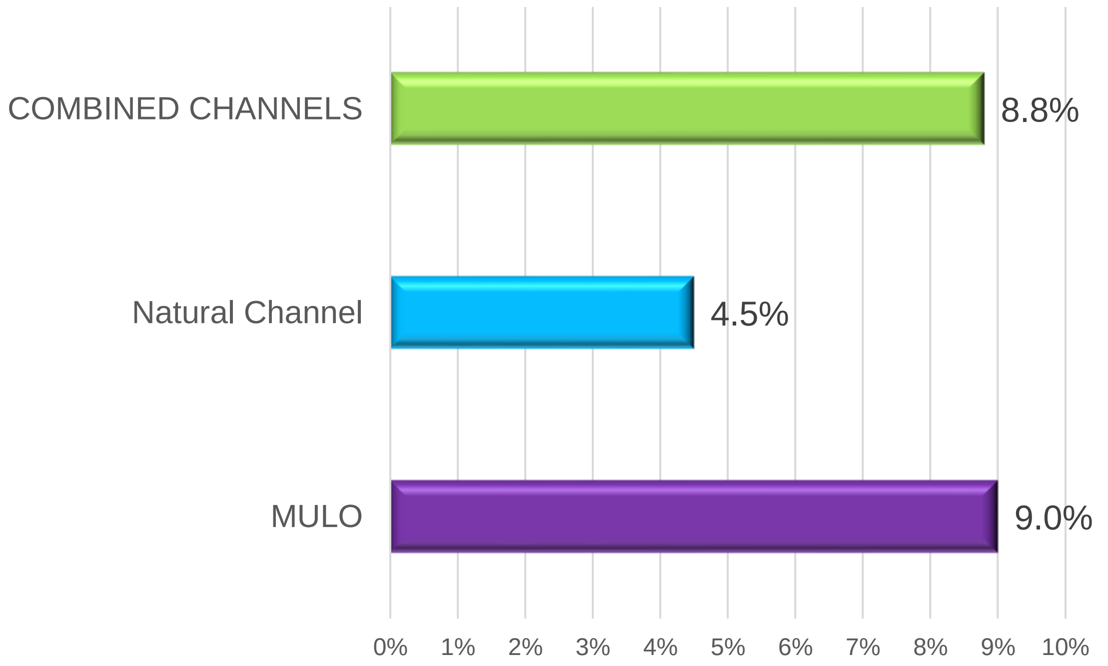
Total US Shelf Stable Baking Ingredients Subcategory

Total US Dollars



	2023	2022
Natural	$152,326,790	$145,752,950
MULO	$4,597,747,415	$4,221,727,889

% Dollar Change vs Year Ago

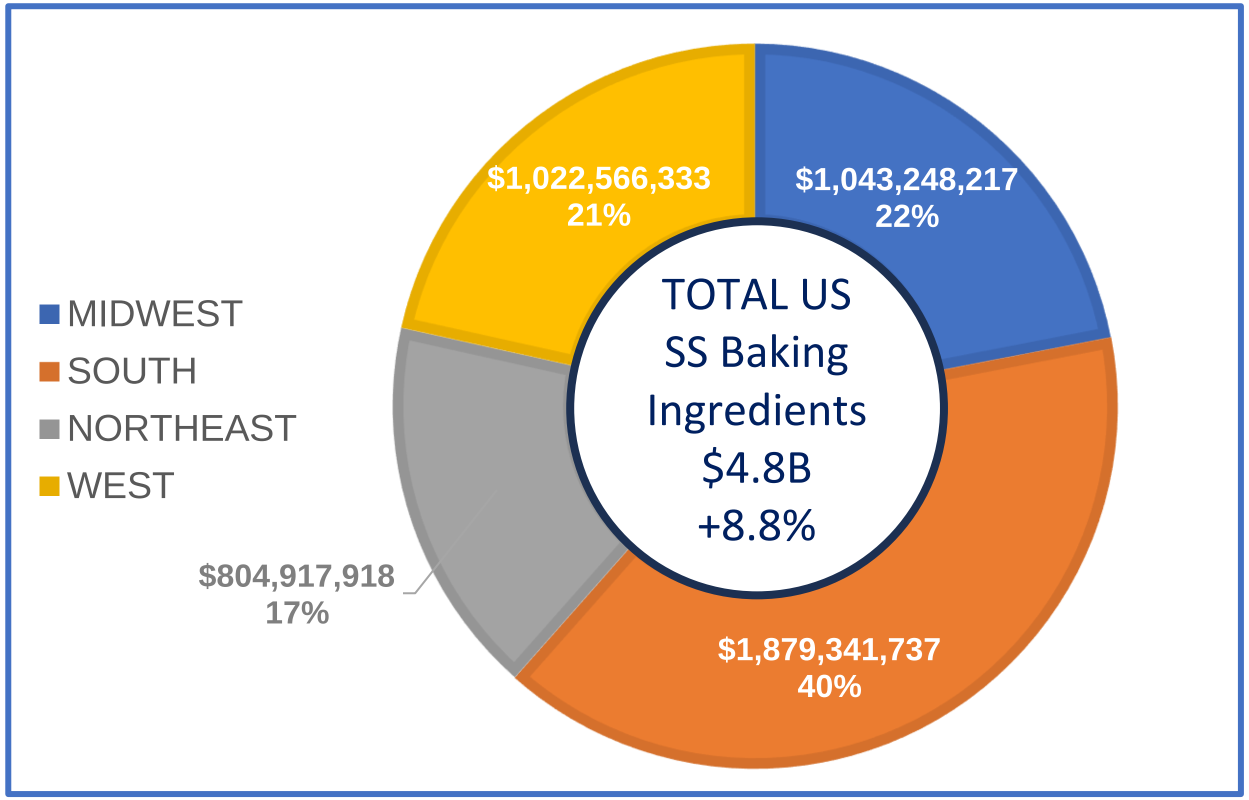


- Total US Shelf Stable Baking Ingredients is a $4.8B subcategory (the largest of the subcategories) and is performing better than prior year by 8.8%.
- Sales dollars were up in both the Natural Channel (+4.5%) and MULO (+9.0%).
- MULO represents the majority of subcategory sales and experienced higher growth than the Natural Channel over prior year.

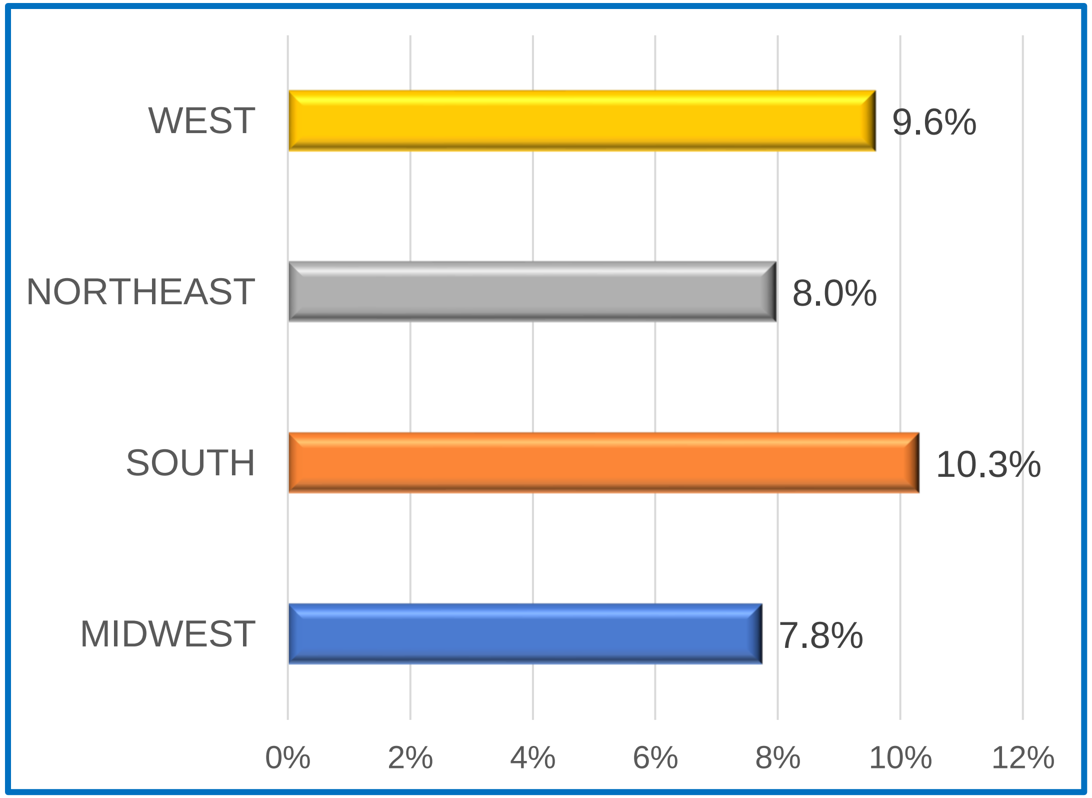
SPINS Satori – 52 weeks ending 12-31-23

Total US Shelf Stable Baking Ingredients Subcategory – By Region

Total Dollars and % Category Share by Region



% Dollar Change vs Year Ago

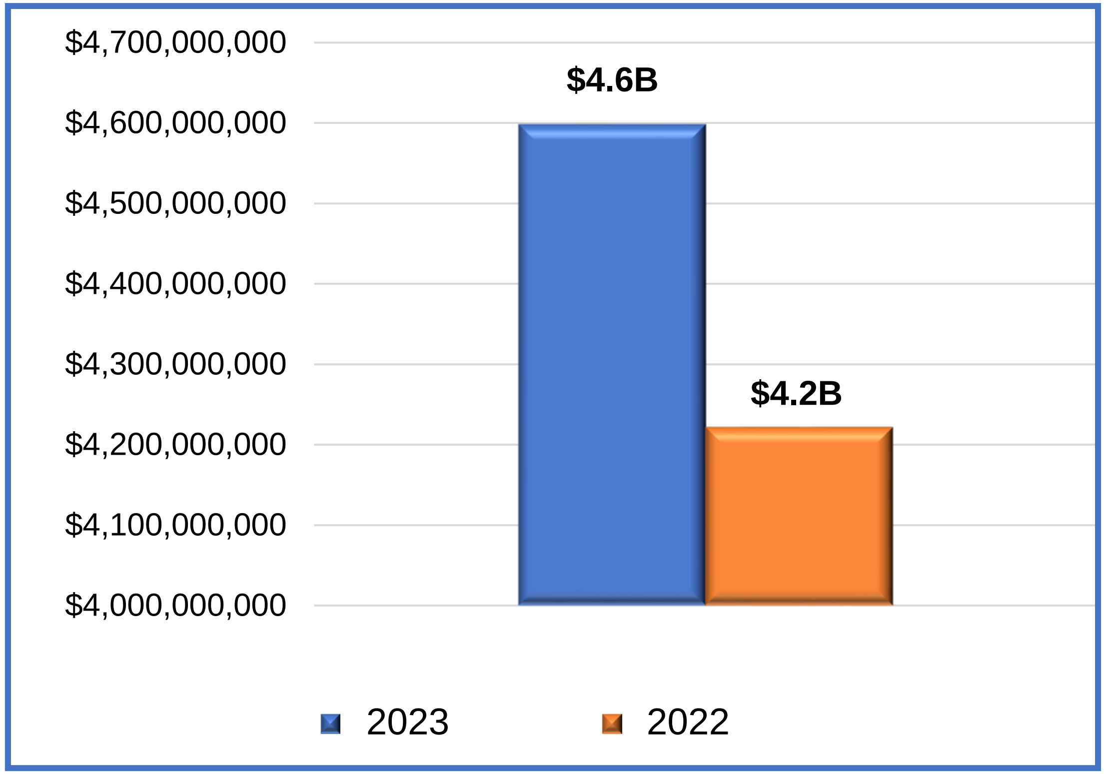


- The South region is the most highly developed region for this subcategory, responsible for 40% of $ volume with the highest growth, +10.3%.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining $ volume with respective growth of 9.6%, 8.0% and 7.8%.

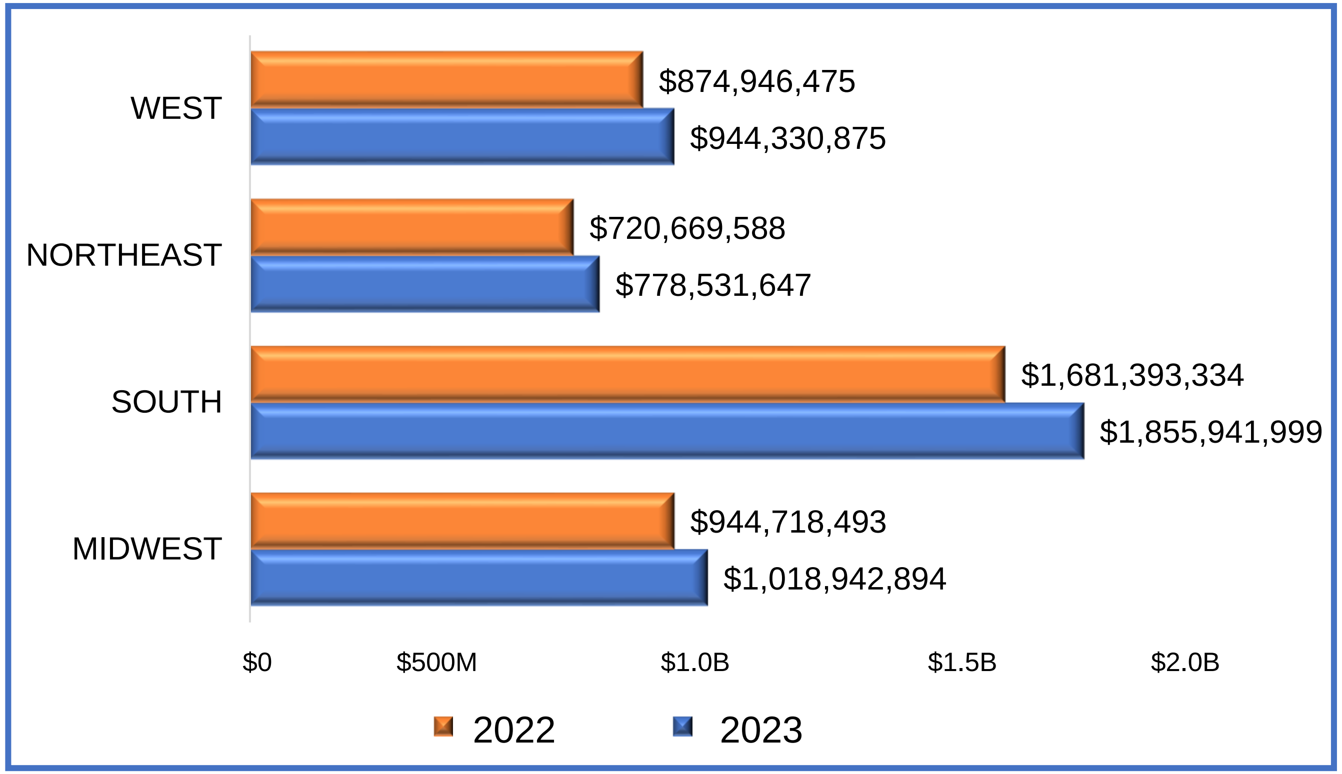
SPINS Satori – 52 weeks ending 12-31-23

MULO: Shelf Stable Baking Ingredients Subcategory

MULO Total US Dollars



Dollar Change vs Year Ago

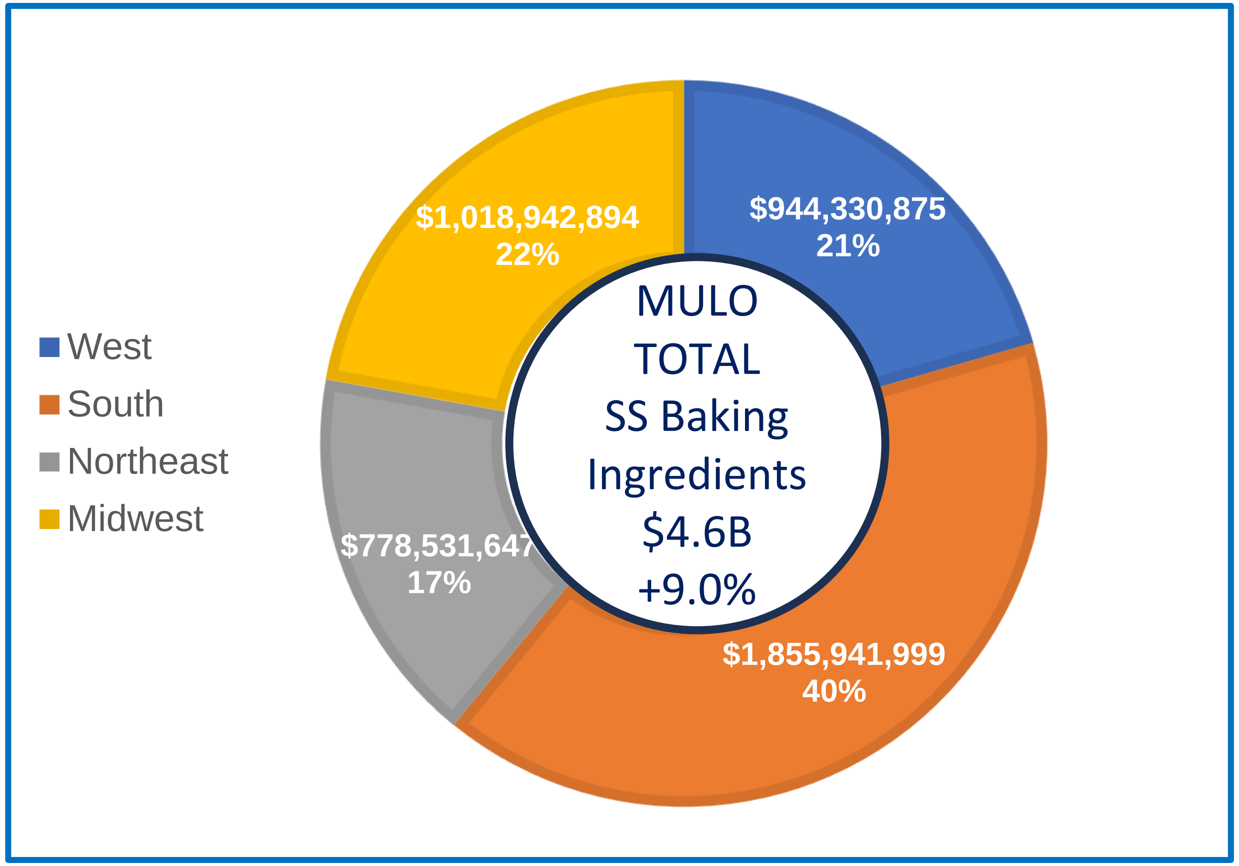


- Total US MULO $ volume for the SS Baking Ingredients subcategory is $4.6B and grew 9.0% over prior year.
- The South region is the largest $ volume region, followed by Midwest, West and Northeast, respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year.

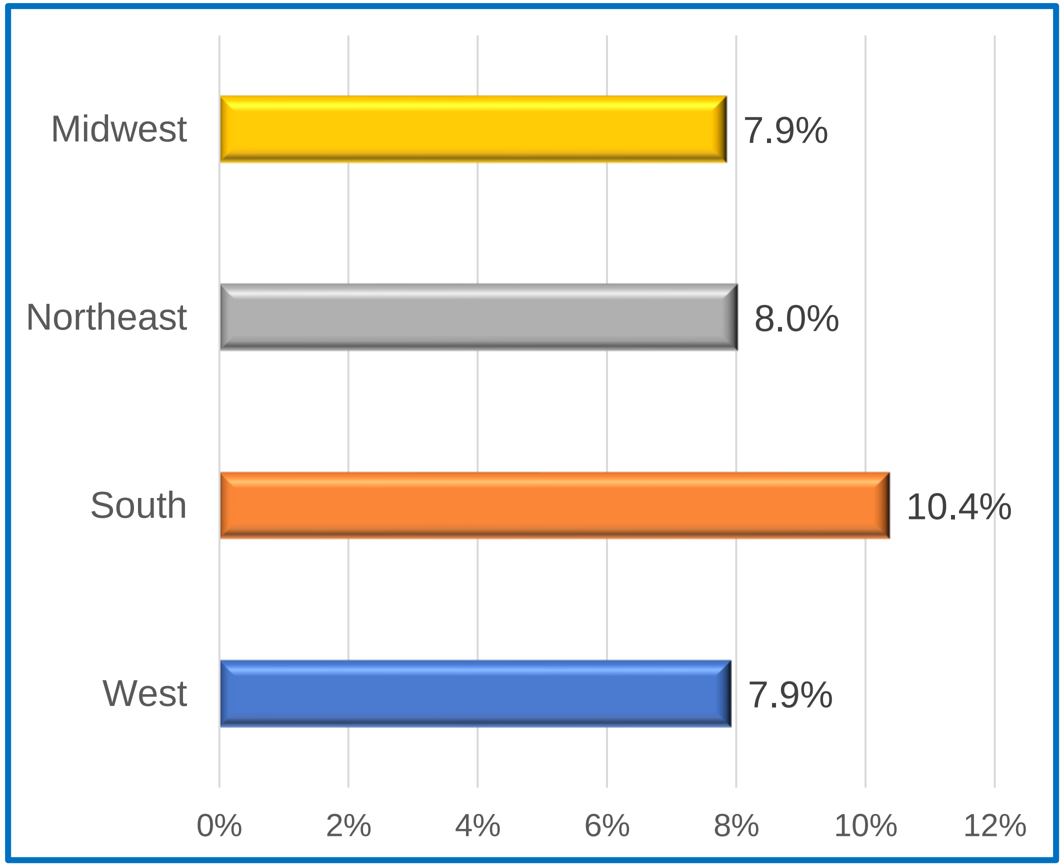
SPINS Satori – 52 weeks ending 12-31-23

MULO: Shelf Stable Baking Ingredients Subcategory – By Region

MULO Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The South region is the most highly developed region for this subcategory, responsible for 40% of $ volume with the highest growth, +10.4%.
- The 3 remaining regions, Northeast, West and Midwest, are responsible for the remaining 60% of $ volume with respective growth of 8.0%, 7.9%, and 7.9%.

SPINS Satori – 52 weeks ending 12-31-23

MULO: Shelf Stable Baking Ingredients – Top 10 Brands Northeast Census Region

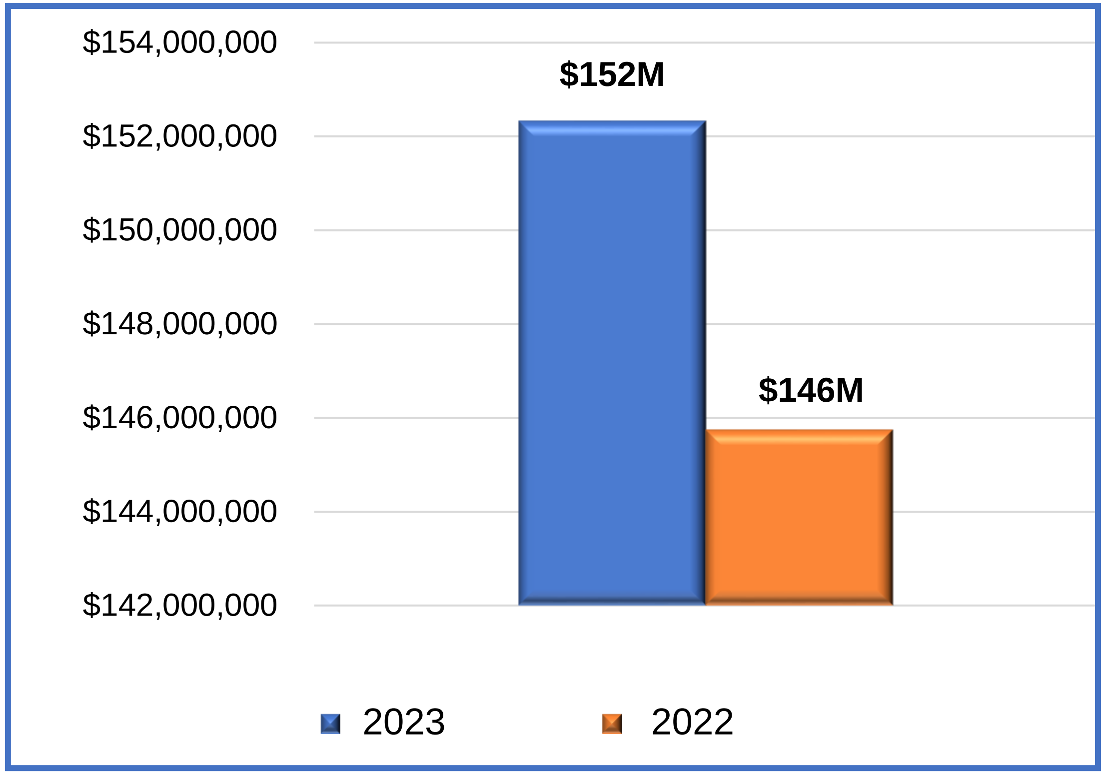
Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	Avg % ACV	Average Items Selling	ARP	ARP, Yago	ARP +/- Chg, Yago
NE SS BAKING INGREDIENTS - MULO TOTAL	**$778,531,647**	**$720,669,588**	**$57,862,059**	**8.0**	**260,626,254**	**258,789,990**	**1,836,264**	**0.7**			**$2.99**	**$2.78**	**$0.20**
PRIVATE LABEL	$177,938,177	$150,470,692	$27,467,485	18.3	80,459,219	74,229,845	6,229,374	8.4	93.4	28.2	$2.21	$2.03	$0.18
NESTLE TOLL HOUSE	$82,260,640	$78,049,843	$4,210,797	5.4	20,354,659	21,380,966	-1,026,307	-4.8	93.3	9.7	$4.04	$3.65	$0.39
CARNATION	$66,625,081	$63,248,320	$3,376,761	5.3	27,597,051	28,805,539	-1,208,488	-4.2	91.7	5	$2.41	$2.20	$0.22
GHIRARDELLI	$39,227,557	$35,247,824	$3,979,733	11.3	8,766,974	8,620,976	145,998	1.7	77.2	12.6	$4.47	$4.09	$0.39
BETTY CROCKER	$31,576,490	$31,273,649	$302,841	1.0	11,655,426	12,531,193	-875,767	-7	86.6	24	$2.71	$2.50	$0.21
CRISCO	$24,305,880	$22,806,418	$1,499,463	6.6	3,396,297	3,632,796	-236,499	-6.5	85.4	4	$7.16	$6.28	$0.88
GOYA	$20,650,819	$20,335,191	$315,628	1.6	8,107,465	8,247,189	-139,724	-1.7	78.1	3.4	$2.55	$2.47	$0.08
HERSHEYS	$20,618,047	$18,882,067	$1,735,979	9.2	5,160,221	5,055,195	105,026	2.1	83.4	5.8	$4.00	$3.74	$0.26
PILLSBURY	$19,053,953	$18,013,910	$1,040,043	5.8	9,260,127	9,302,336	-42,208	-0.5	80.2	16	$2.06	$1.94	$0.12
ARM & HAMMER	$17,656,832	$16,278,348	$1,378,483	8.5	9,266,738	9,111,298	155,441	1.7	93.2	2.8	$1.91	$1.79	$0.12
NE TOP 10 BRANDS SUBTOTAL	**$499,913,476**	**$454,606,263**	**$45,307,213**	**10.0%**	**184,024,178**	**180,917,332**	**3,106,845**	**1.7%**					

- MULO Northeast SS Baking Ingredients is showing 8.0% growth over prior year in $ volume in the Northeast but is relatively flat in unit sales at +0.7%.
- Private Label brands (Retailer brands produced by others) are the largest brand segment of this subcategory, responsible for 23% of overall subcategory $ sales and 36% of Top 10 brands $ sales.
- Specialty brand Ghirardelli is the 4th largest $ brand in the Northeast SS Baking Ingredients subcategory.
- Goya, another specialty brand is the 7th largest in dollars.

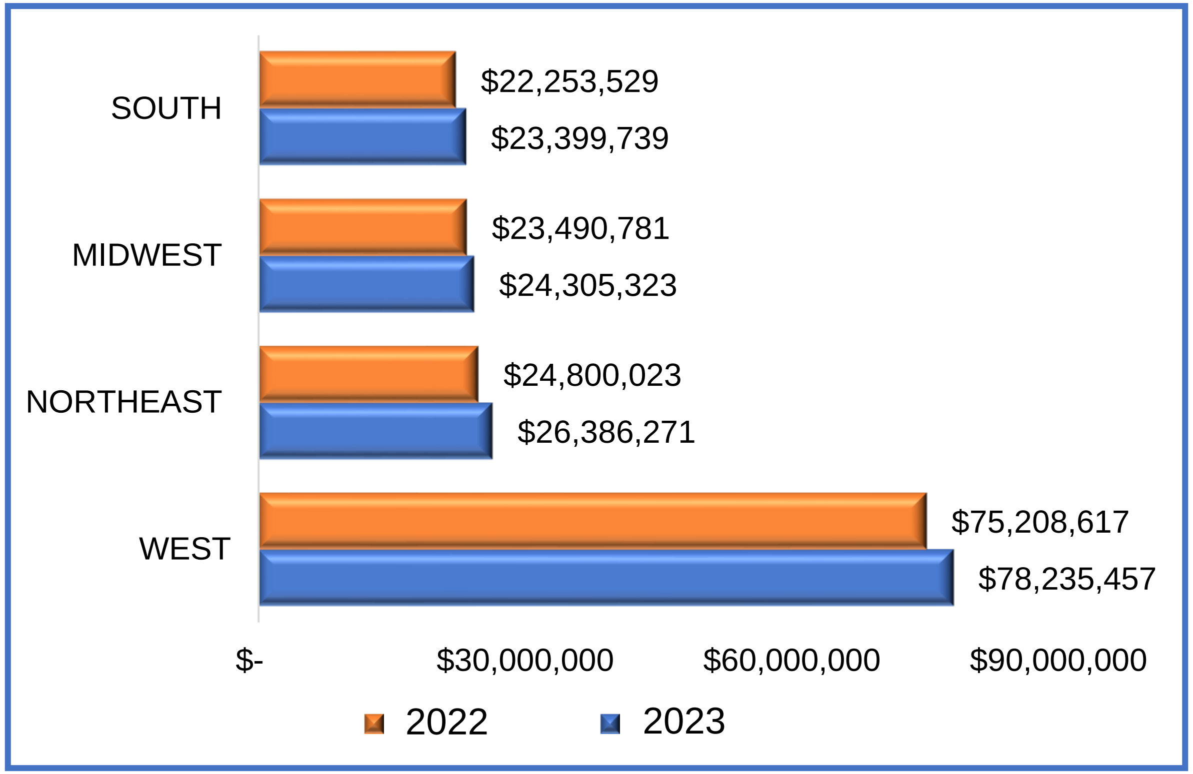
SPINS Satori – 52 weeks ending 12-31-23

Natural Channel: Shelf Stable Baking Ingredients Subcategory

Natural Channel Total US Dollars



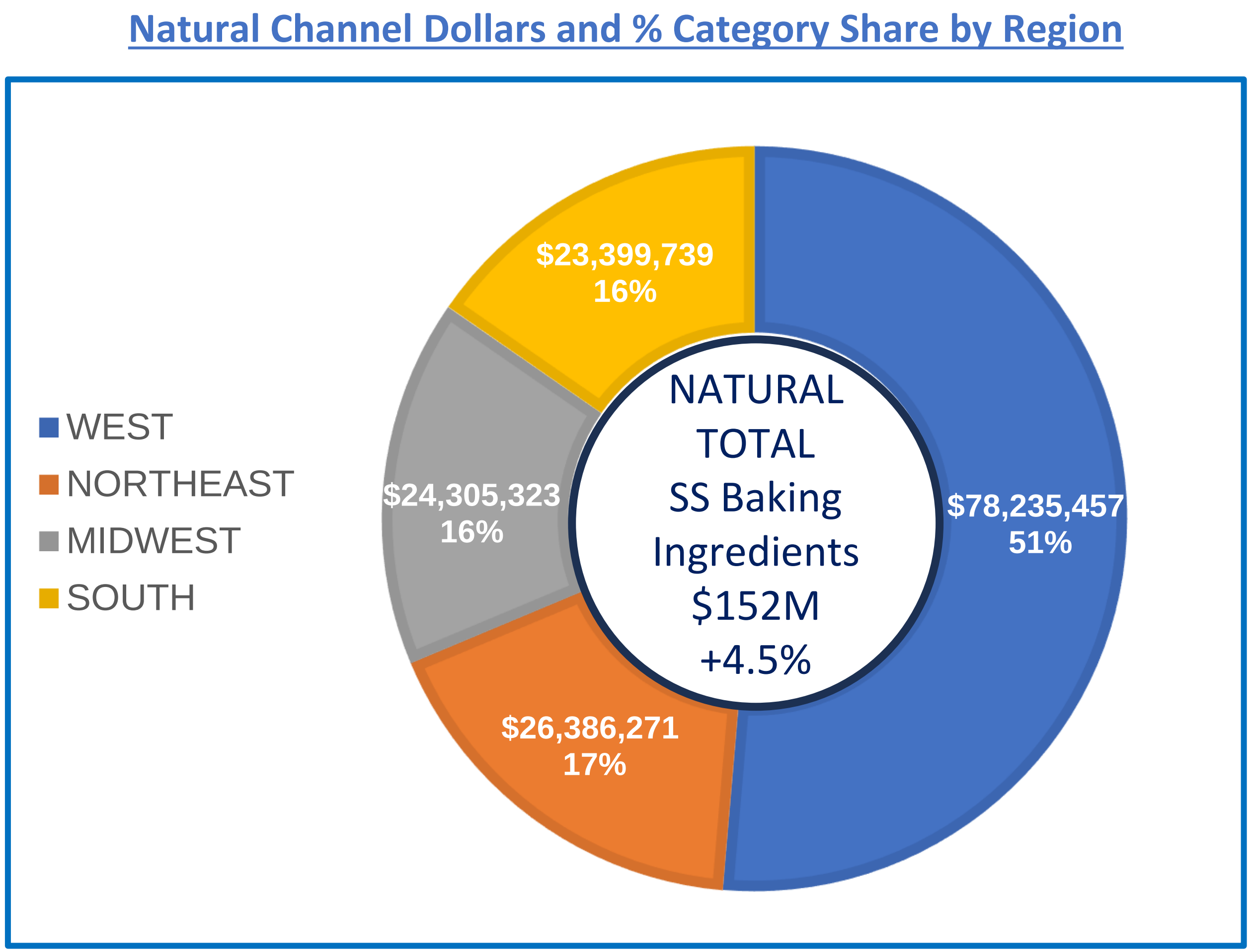
Dollar Change vs Year Ago

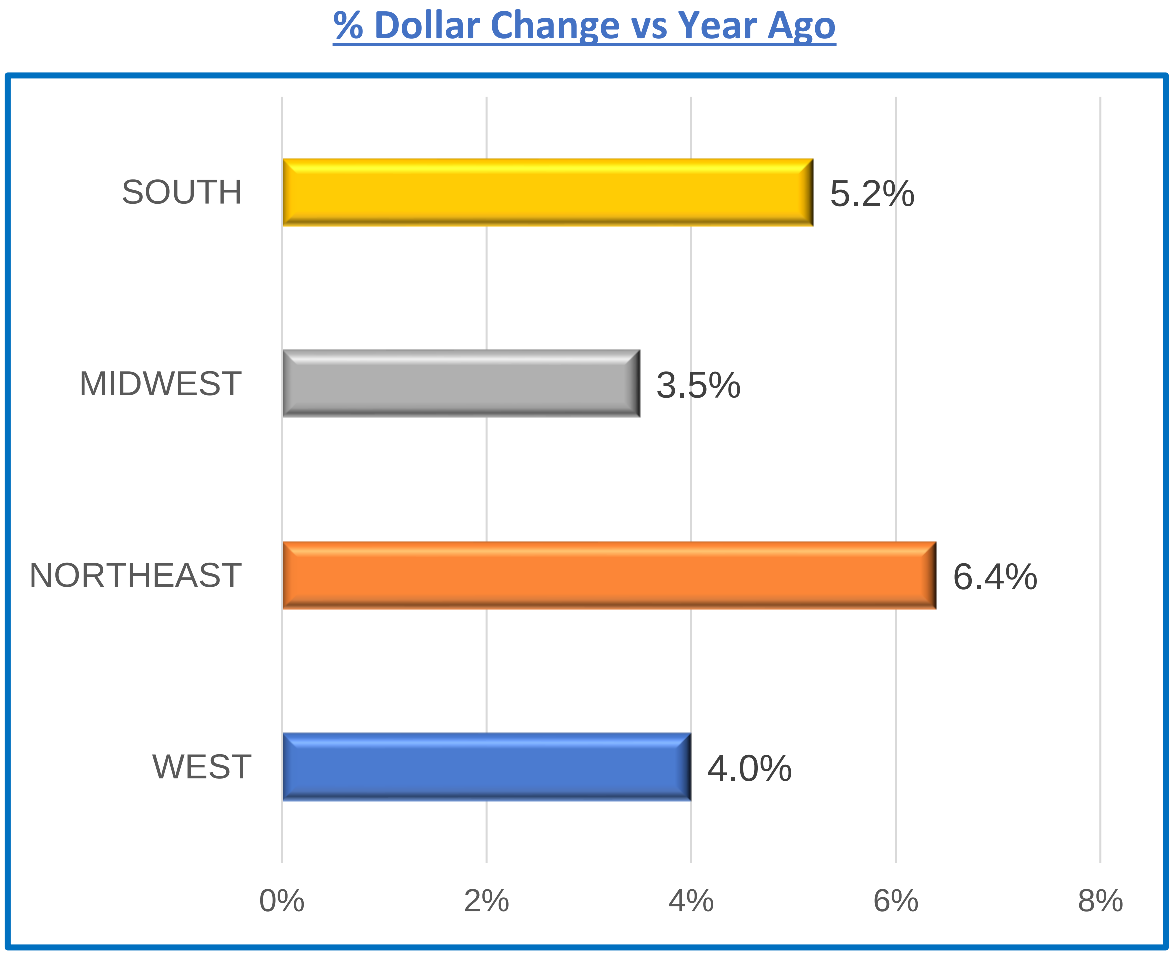


- Total Natural Channel $ volume for the SS Baking Ingredients subcategory is $152M and is up 4.5% over prior year.
- The West region is the largest $ volume region, followed by the Northeast, Midwest and South, respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year.

SPINS Satori – 52 weeks ending 12-31-23

Natural Channel: Shelf Stable Baking Ingredients Subcategory – By Region





- The West region is the most highly developed region for this subcategory, responsible for 51% of $ volume and is up 4% over prior year.
- The 3 remaining regions, Northeast, South and Midwest, are responsible for the remaining 49% of $ volume with respective growth of 6.4%, 5.2%, and 3.5%. The Northeast experienced the highest % growth among the regions.

SPINS Satori – 52 weeks ending 12-31-23

Natural Channel: Shelf Stable Baking Ingredients Subcategory – Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	Avg % ACV	Average Items Selling	ARP	ARP, Yago	ARP +/- Chg, Yago
NE SS BAKING INGREDIENTS - NATURAL TOTAL	**$26,386,271**	**$24,800,023**	**$1,586,248**	**6.4**	**6,295,394**	**6,352,413**	**(57,019)**	**-0.9**			**$ 4.19**	**$ 3.90**	**$ 0.29**
GHIRARDELLI	$ 2,247,655	$ 2,173,132	$ 74,523	3.4	453,816	473,825	(20,009)	-4.2	87.8	7.1	$ 4.95	$ 4.59	$ 0.36
NESTLE TOLL HOUSE	$ 1,896,043	$ 1,799,346	$ 96,698	5.4	438,338	423,785	14,552	3.4	69.2	6.1	$ 4.33	$ 4.25	$ 0.08
GUITTARD	$ 1,178,890	$ 1,003,932	$ 174,958	17.4	176,649	156,217	20,432	13.1	64.6	4.9	$ 6.67	$ 6.43	$ 0.24
ENJOY LIFE	$ 1,174,951	$ 1,129,668	$ 45,283	4	169,222	177,348	(8,126)	-4.6	81.5	2.7	$ 6.94	$ 6.37	$ 0.57
NATIVE FOREST	$ 1,139,336	$ 1,171,020	$ (31,684)	-2.7	354,231	376,206	(21,976)	-5.8	58.8	3.5	$ 3.22	$ 3.11	$ 0.11
CARNATION	$ 1,006,957	$ 957,135	$ 49,822	5.2	386,853	396,652	(9,799)	-2.5	64.6	3.5	$ 2.60	$ 2.41	$ 0.19
NAVITAS ORGANICS	$ 961,475	$ 920,842	$ 40,633	4.4	85,787	90,282	(4,495)	-5	59.8	3.2	$ 11.21	$ 10.20	$ 1.01
BOBS RED MILL	$ 932,613	$ 849,894	$ 82,719	9.7	186,190	174,661	11,529	6.6	87.1	7.2	$ 5.01	$ 4.87	$ 0.14
BETTY CROCKER	$ 930,615	$ 802,224	$ 128,391	16	260,744	243,874	16,871	6.9	58.7	25	$ 3.57	$ 3.29	$ 0.28
FIELD DAY	$ 911,518	$ 728,398	$ 183,121	25.1	351,008	327,274	23,734	7.3	28.7	5.2	$ 2.60	$ 2.23	$ 0.37
NE TOP 10 BRANDS SUBTOTAL	**$12,380,053**	**$11,535,590**	**$ 844,462**	**7.3%**	**2,862,837**	**2,840,123**	**22,715**	**0.8%**					

- Natural Channel Northeast SS Baking Ingredients is showing 6.4% growth over prior year in $ sales in the Northeast, but is in slight decline in unit sales at negative 0.9%
- Increase in price is driving $ sales increases.
- Specialty brand Ghirardelli represents 8.5% of Total Natural Channel sales $ and 18% of Top 10 brands sales $.
- Specialty brand Bob's Red Mill is the 7th largest $ volume brand of the Top 10 brands reviewed in the Baking Ingredients segment.
- Private Label in the Natural Channel is not represented in the Top 10 Brands.

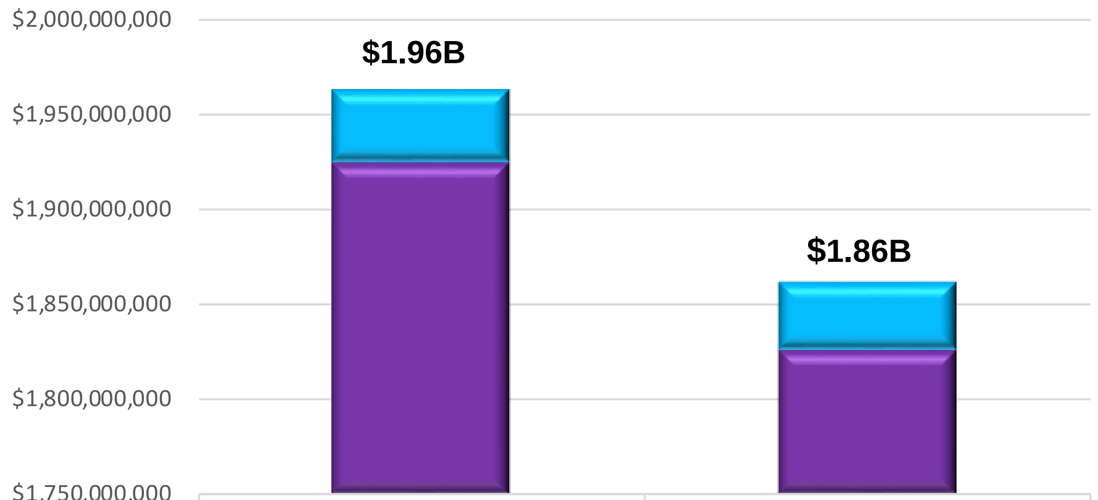
SPINS Satori – 52 weeks ending 12-31-23

Subcategory Performance
Shelf Stable Baking Mixes

SPINS Satori - 52 Weeks Ending 12-31-23

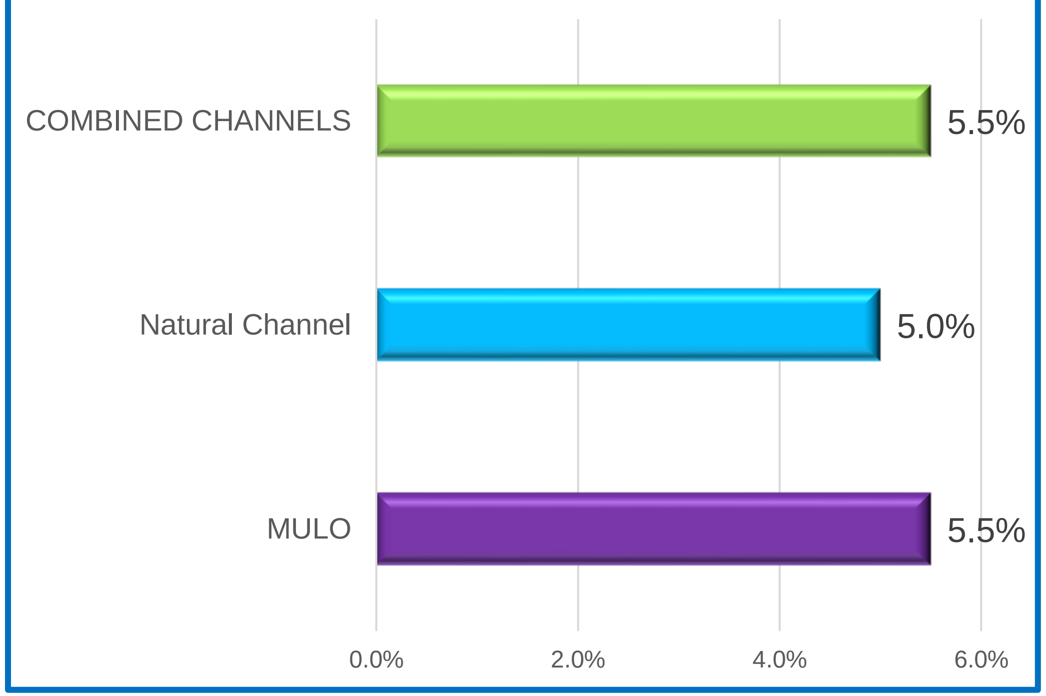
Total US Shelf Stable Baking Mixes Subcategory

Total US Dollars



	2023	2022
Natural	$37,875,281	$36,055,392
MULO	$1,925,628,373	$1,826,330,090

% Dollar Change vs Year Ago

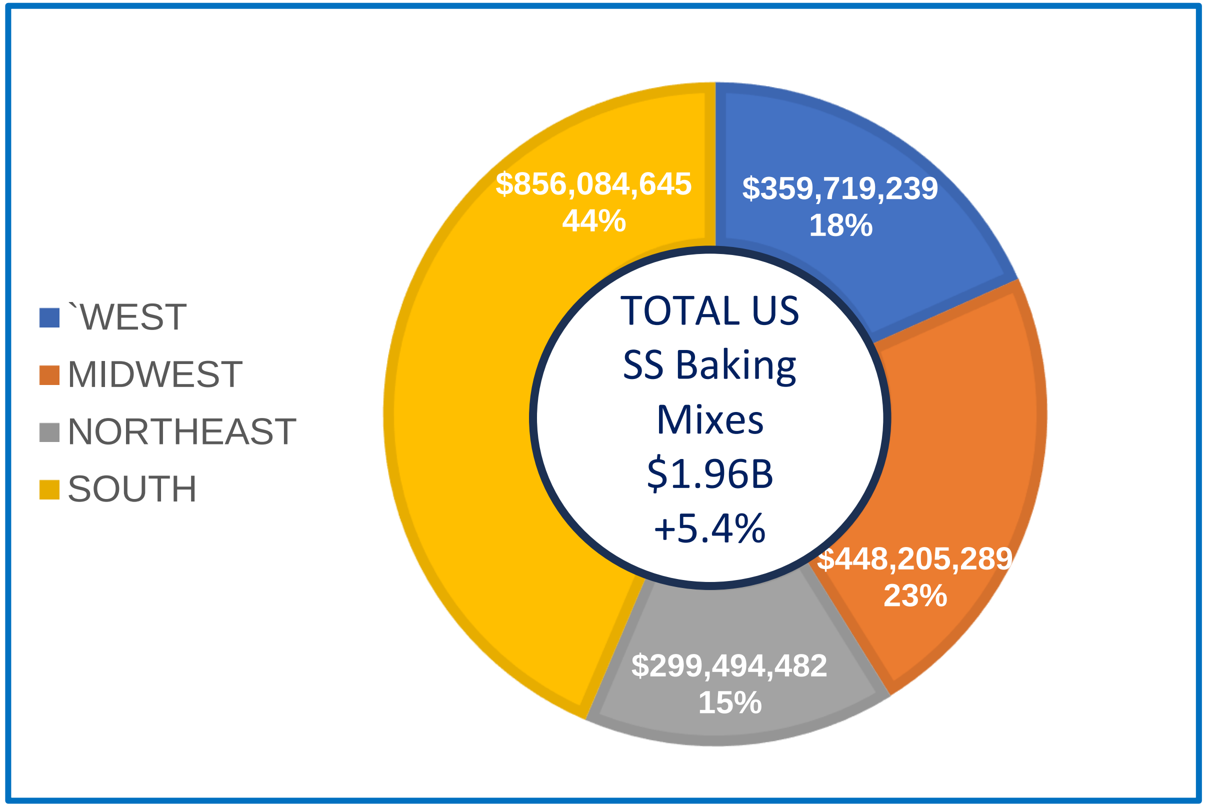


- Total US Shelf Stable Baking Mixes is a $1.96B Category and is performing better than the prior year by 5.5%.
- Sales dollars were up in both the Natural Channel (+5.0%) and MULO (+5.5%).

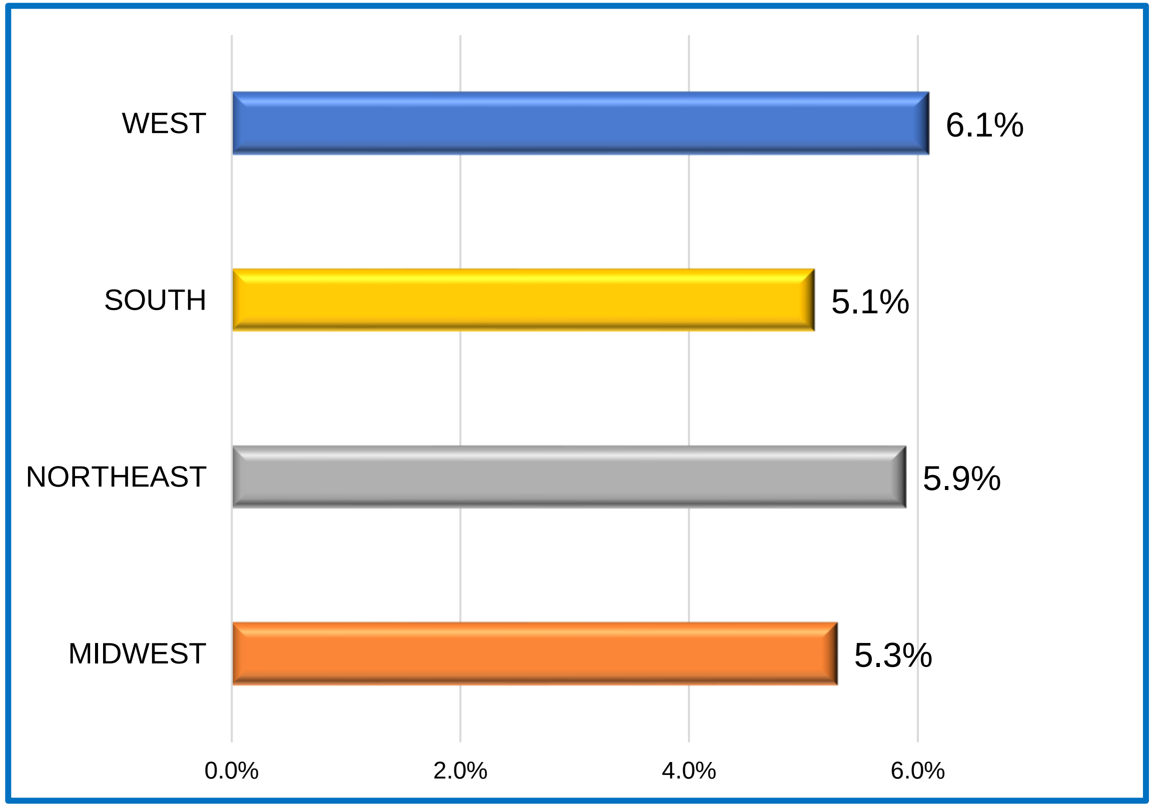
SPINS Satori – 52 weeks ending 12-31-23

Total US Shelf Stable Baking Mixes Subcategory – By Region

Total Dollars and % Category Share by Region



% Dollar Change vs Year Ago

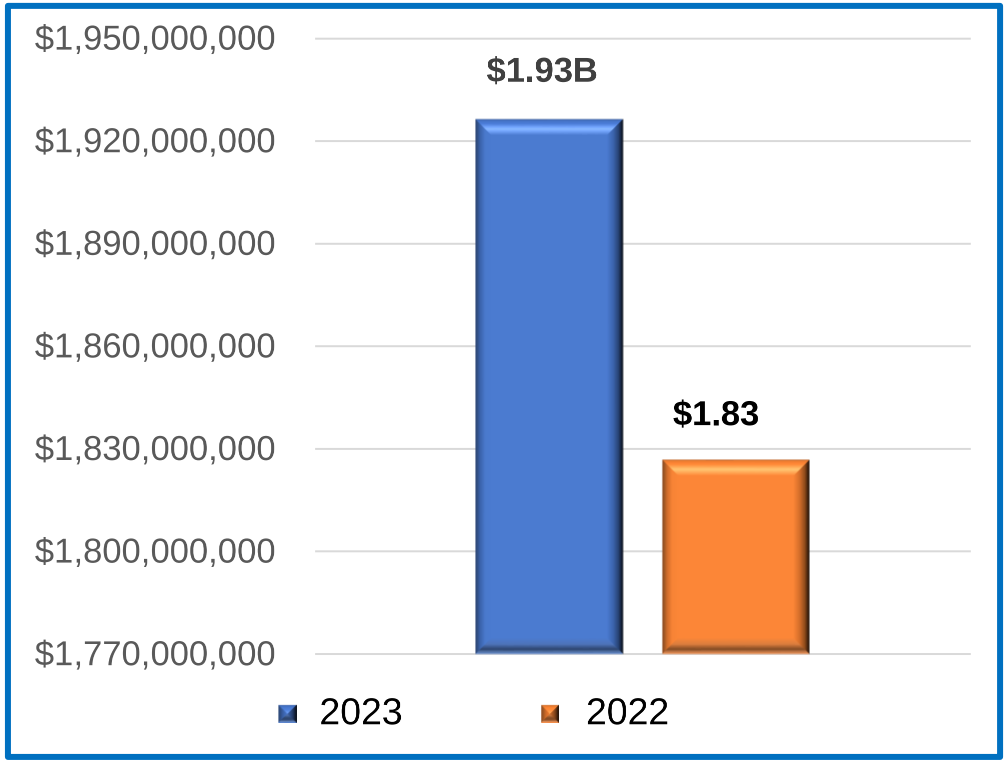


- The South region is the most highly developed region for this sub-category, responsible for 44% of $ volume but with the lowest growth, +5.1%.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining $ volume with respective growth of 6.1%, 5.9% and 5.3%.

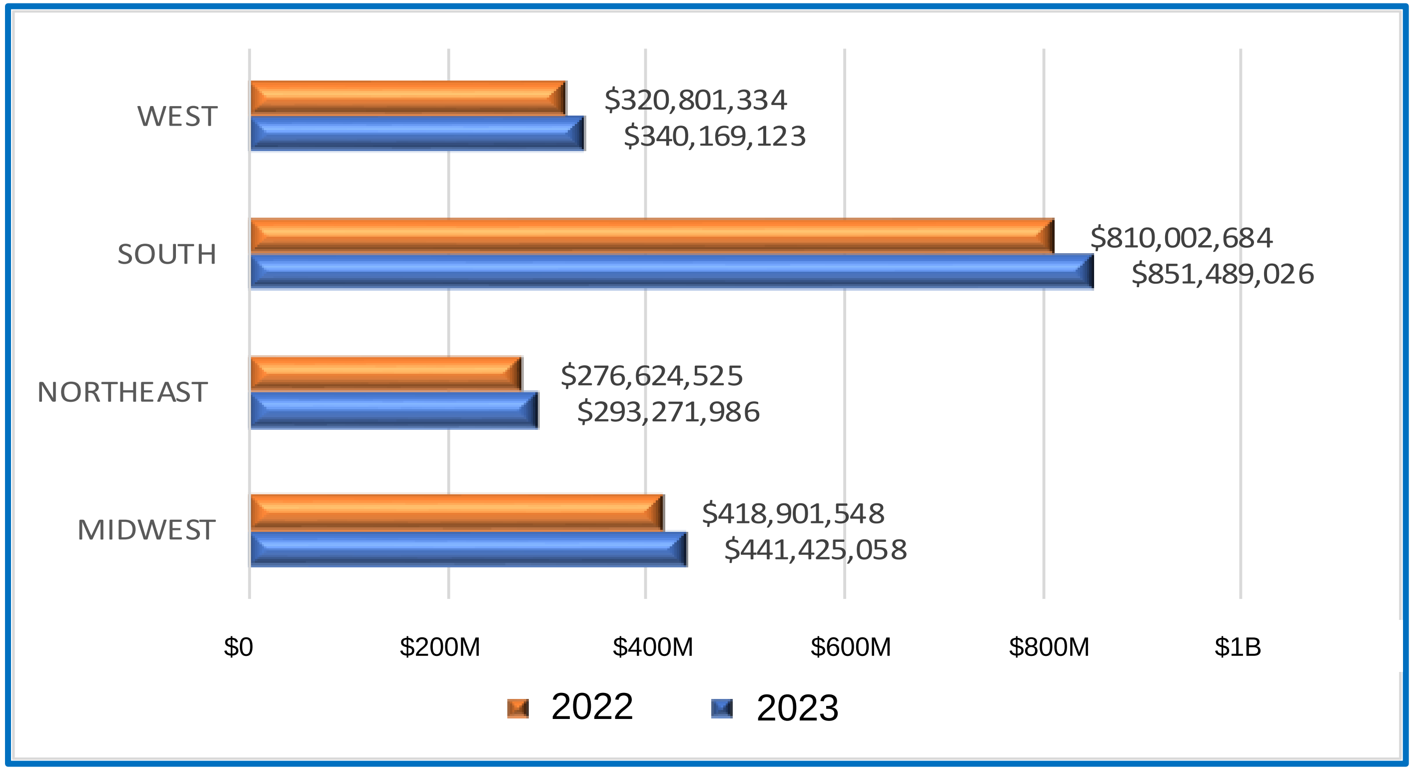
SPINS Satori – 52 weeks ending 12-31-23

MULO: Shelf Stable Baking Mixes Subcategory

MULO Total US Dollars



Dollar Change vs Year Ago

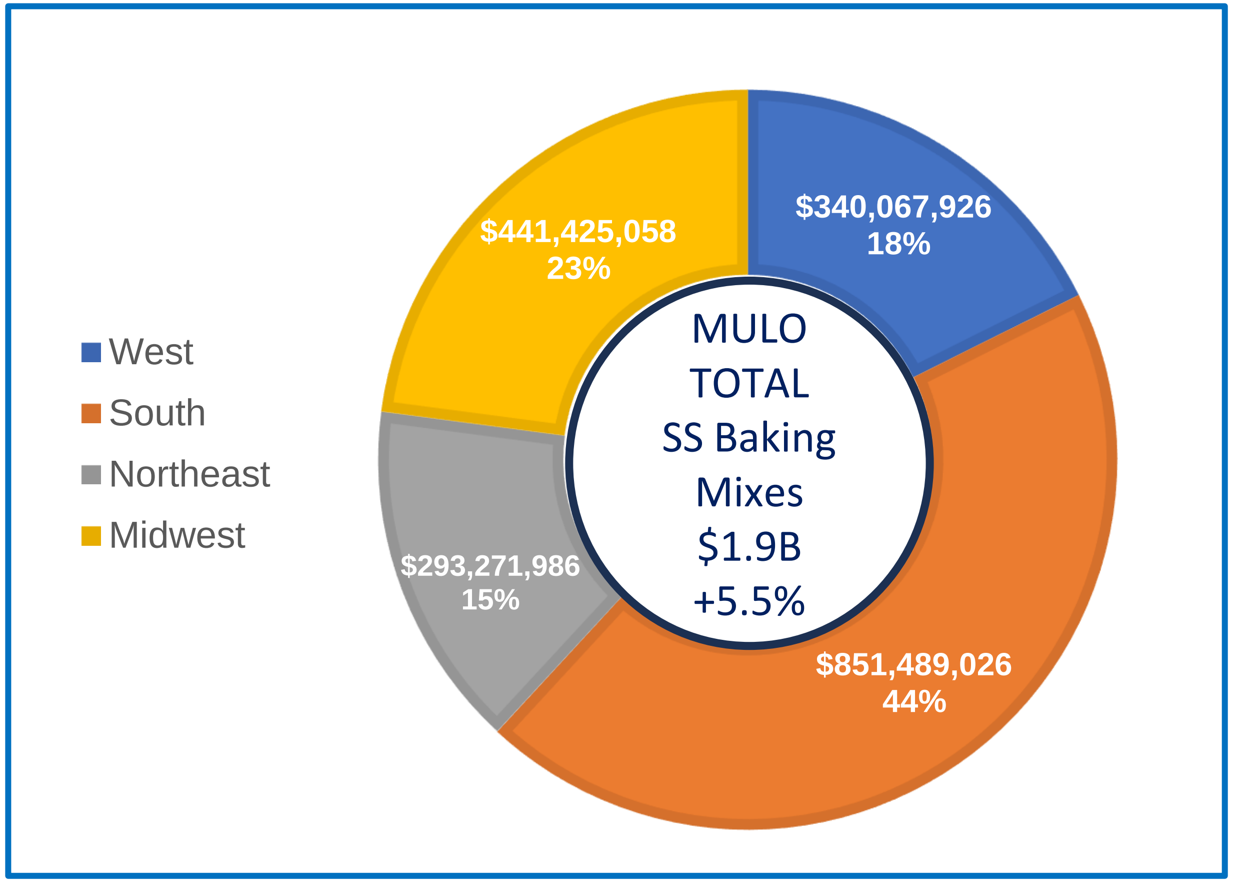


- Total US MULO $ volume for the SS Baking Mixes subcategory is $1.93B and grew 5.5% over prior year.
- The South region is the largest $ volume region, followed by Midwest, West and Northeast, respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year.

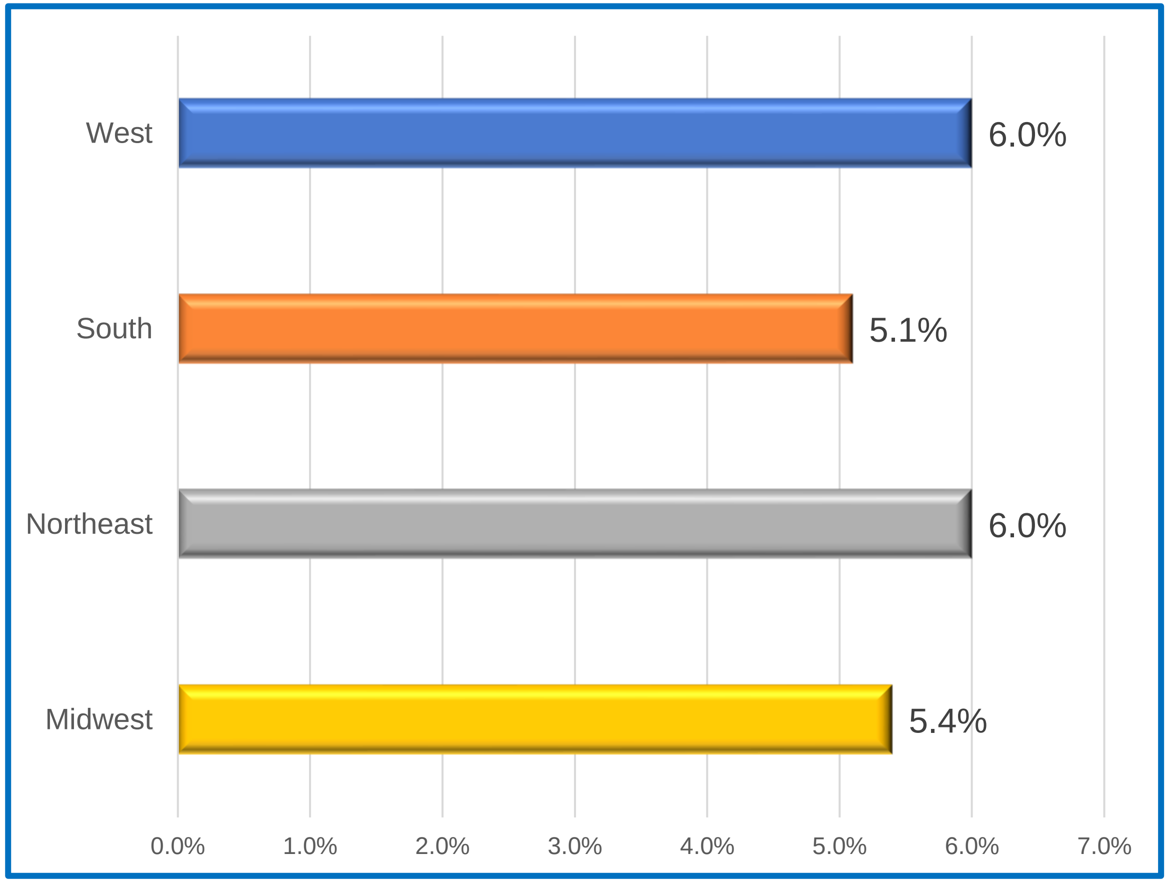
SPINS Satori – 52 weeks ending 12-31-23

MULO: Shelf Stable Baking Mixes Subcategory

MULO Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The South region is the most highly developed region for this subcategory, responsible for 44% of $ volume with growth of 5.1%.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining 54% of $ volume with respective growth of 6.0%, 6.0% and 5.4%.

SPINS Satori – 52 weeks ending 12-31-23

MULO: Shelf Stable Baking Mixes – Top 10 Brands Northeast Census Region

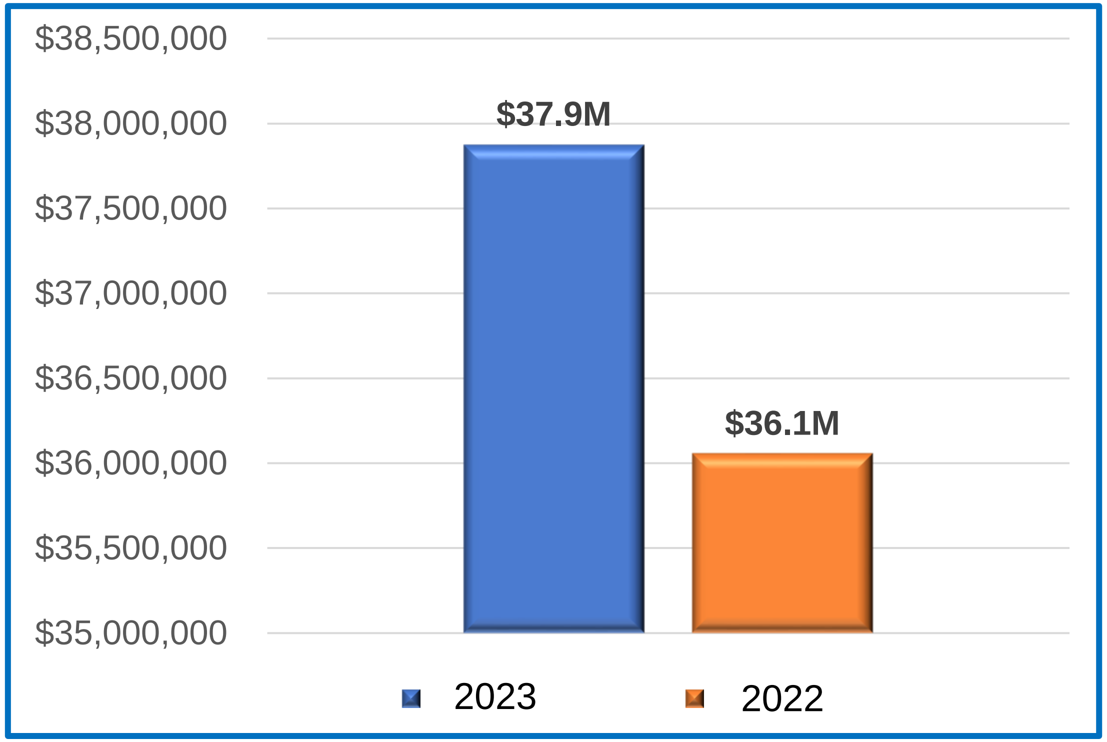
Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	Avg % ACV	Average Items Selling	ARP	ARP, Yago	ARP +/- Chg, Yago
NE SS BAKING MIXES - MULO TOTAL	**$293,130,759**	**$276,624,525**	**$16,506,234**	**6.0**	**125,898,372**	**126,101,077**	**-202,705**	**-0.2**			**$2.33**	**$2.19**	**$0.14**
BETTY CROCKER	$90,904,380	$88,250,212	$2,654,168	3.0	38,167,577	40,209,054	-2,041,477	-5.1	97.4	38.6	$2.38	$2.19	$0.19
DUNCAN HINES	$33,782,315	$32,286,077	$1,496,238	4.6	17,775,456	17,512,248	263,209	1.5	79.8	21.9	$1.90	$1.84	$0.06
PILLSBURY	$29,741,659	$28,913,915	$827,745	2.9	14,696,546	14,914,469	-217,922	-1.5	80	21.6	$2.02	$1.94	$0.08
KRUSTEAZ	$24,139,607	$22,385,405	$1,754,202	7.8	7,143,044	7,299,907	-156,862	-2.1	81.3	12.3	$3.38	$3.07	$0.31
PRIVATE LABEL	$17,955,003	$16,539,084	$1,415,919	8.6	10,510,532	10,010,318	500,213	5	61.1	11.4	$1.71	$1.65	$0.06
BISQUICK	$16,649,247	$16,630,639	$18,608	0.1	3,056,822	3,542,689	-485,867	-13.7	80.3	4	$5.45	$4.69	$0.76
JIFFY	$14,642,855	$13,392,933	$1,249,923	9.3	16,555,952	15,814,940	741,012	4.7	85.1	5.3	$0.88	$0.85	$0.03
GHIRARDELLI	$14,518,189	$13,065,533	$1,452,656	11.1	4,158,779	4,206,522	-47,743	-1.1	81.2	4.5	$3.49	$3.11	$0.38
KING ARTHUR	$6,430,632	$5,532,627	$898,005	16.2	1,201,405	1,091,221	110,184	10.1	61.8	5.5	$5.35	$5.07	$0.28
RED LOBSTER	$6,030,544	$5,330,662	$699,883	13.1	1,773,421	1,646,798	126,622	7.7	74.1	1.7	$3.40	$3.24	$0.16
NE TOP 10 BRANDS SUBTOTAL	**$254,794,432**	**$242,327,085**	**$12,467,346**	**5.1%**	**115,039,534**	**116,248,165**	**-1,208,631**	**-1.0%**					

- Baking Mixes, the 2nd largest subcategory in MULO, is growing 6% $ volume over prior year in the Northeast, but is in slight decline in unit volume, at -0.2%.
- Betty Crocker is the leading brand within this subcategory in the Northeast with $91M in $ volume, growing +3.0%, but in decline in unit volume, at -5.1%.
- Private Label in this subcategory is a less dominant player, ranking 5th in overall $ volume, registering 8.6% growth and showing a 5% increase in unit volume, year over year.
- Specialty Brand Krusteaz places 4th, with positive $ growth of 7.8% and Unit volume decline of -2.1%, and is averaging a $0.31 per unit price increase over the prior year.

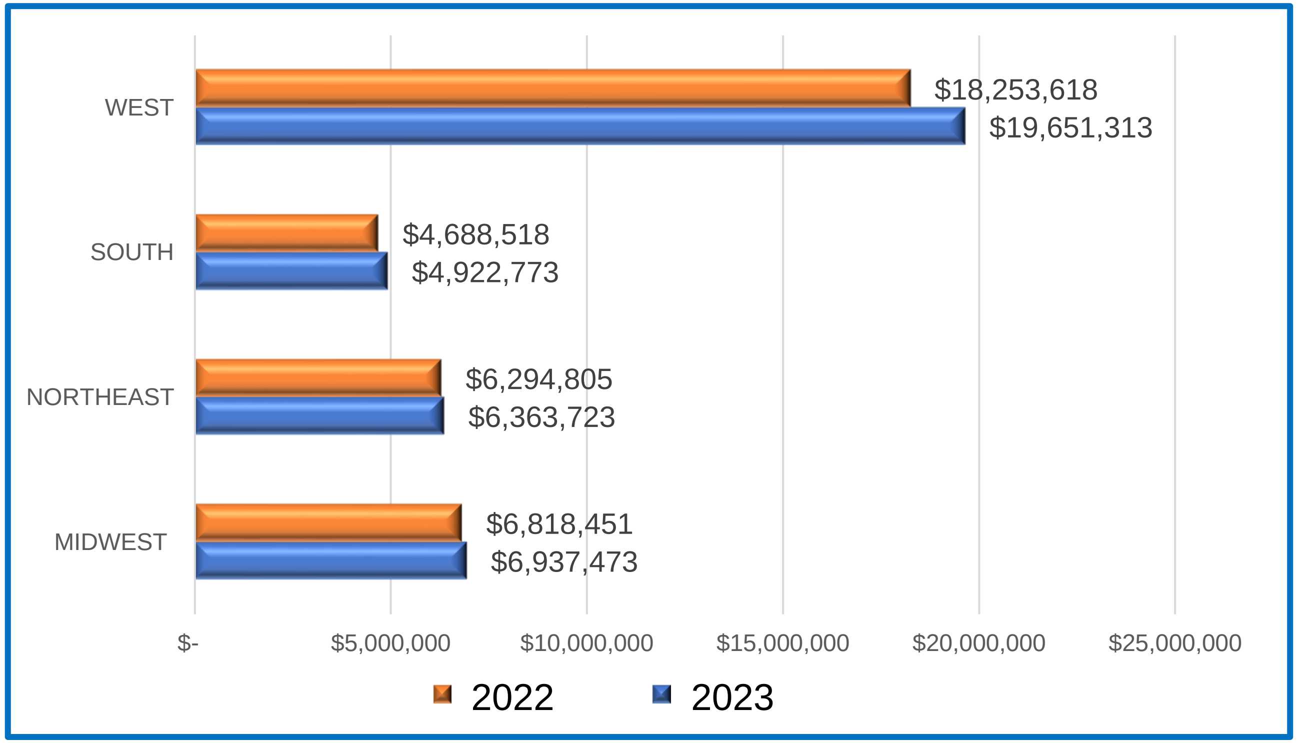
SPINS Satori – 52 weeks ending 12-31-23

Natural Channel: Shelf Stable Baking Mixes Subcategory

Natural Channel Total US Dollars



Dollar Change vs Year Ago

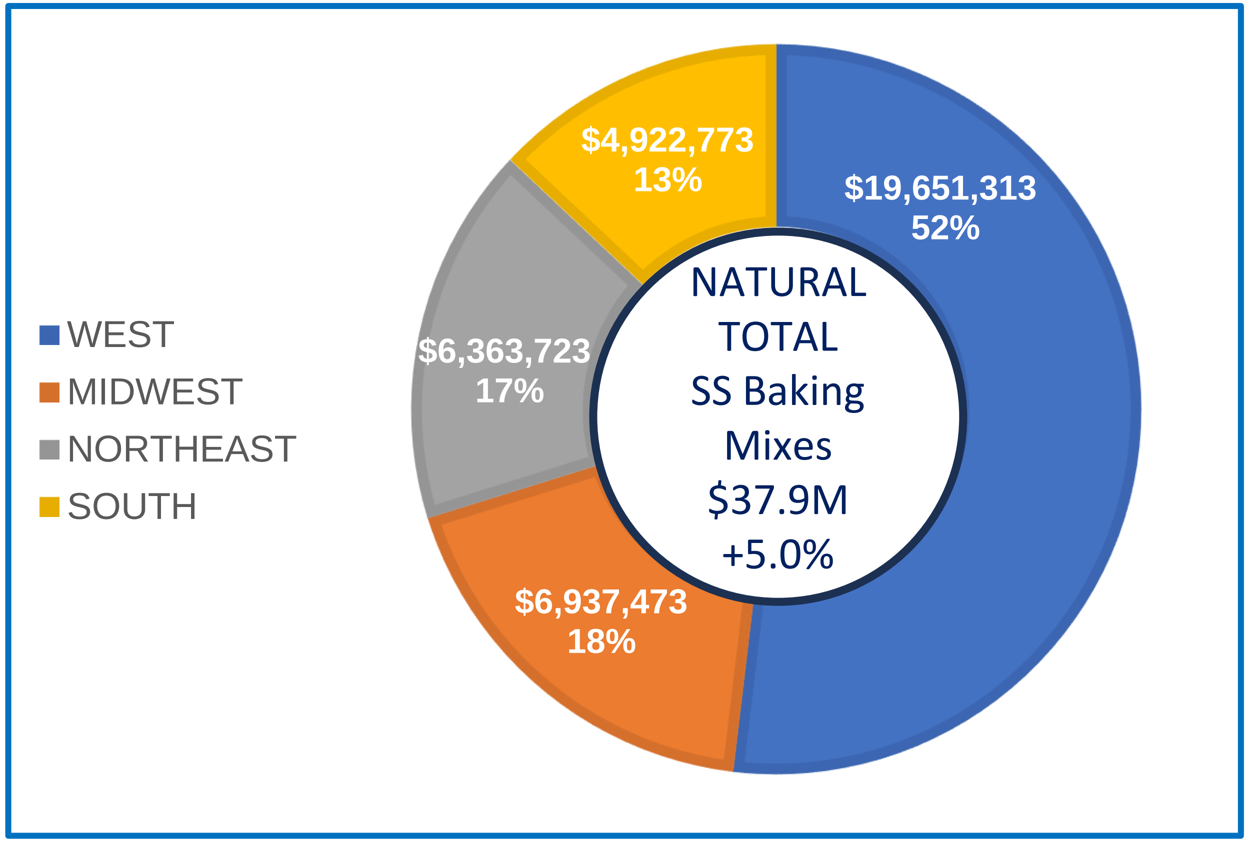


- Total Natural $ volume for the SS Baking Mixes subcategory is $37.9M and grew 5% over prior year.
- The West region is by far the largest $ Volume region, followed by the Midwest, Northeast, and South, respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year.

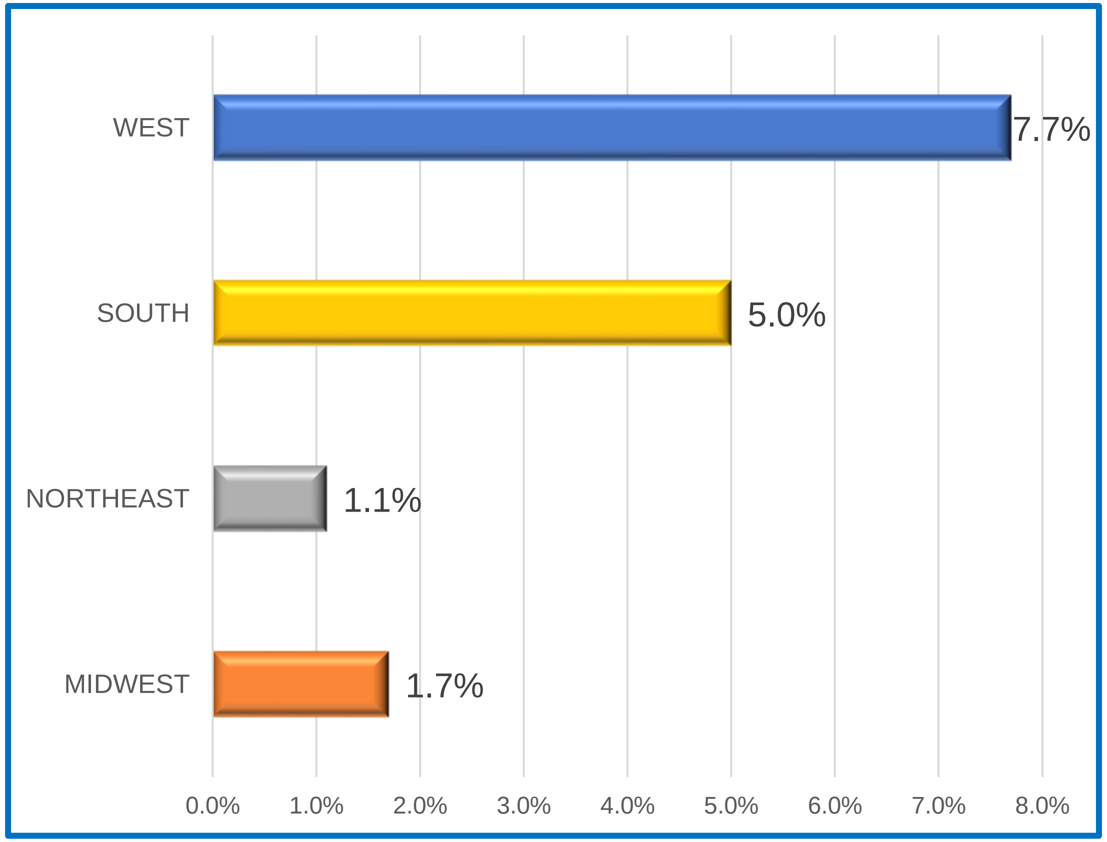
SPINS Satori – 52 weeks ending 12-31-23

Natural Channel: Shelf Stable Baking Mixes Subcategory – By Region

Natural Channel Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The West region is the most highly developed region for this subcategory, responsible for 52% of $ volume with the highest growth over prior year at 7.0%.
- The 3 remaining regions, South, Midwest, and Northeast, are responsible for the remaining 48% of $ volume with respective growth of 5.0%, 1.7% and 1.1%.

SPINS Satori – 52 weeks ending 12-31-23

Natural Channel: Shelf Stable Baking Mixes – Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	Avg % ACV	Average Items Selling	ARP	ARP, Yago	ARP +/- Chg, Yago
NE SS BAKING MIXES - NATURAL TOTAL	**$6,363,723**	**$6,294,805**	**$68,917**	**1.1**	**1,526,828**	**1,594,480**	**(67,653)**	**-4.2**			**$ 4.17**	**$ 3.95**	**$ 0.22**
SIMPLE MILLS	$895,426	$865,514	$29,912	3.5	108,187	108,759	(572)	-0.5	68.6	4.5	$ 8.28	$ 7.96	$ 0.32
BETTY CROCKER	$803,370	$814,084	-$10,713	-1.3	286,136	310,201	(24,065)	-7.8	61	19.2	$ 2.81	$ 2.62	$ 0.19
KING ARTHUR	$642,918	$543,788	$99,130	18.2	93,175	86,143	7,032	8.2	59.1	4.7	$ 6.90	$ 6.31	$ 0.59
DUNCAN HINES	$610,974	$606,008	$4,967	0.8	232,287	235,780	(3,494)	-1.5	60.8	11.4	$ 2.63	$ 2.57	$ 0.06
STONEWALL KITCHEN	$517,876	$553,778	-$35,902	-6.5	53,911	60,420	(6,510)	-10.8	40	13.6	$ 9.61	$ 9.17	$ 0.44
GHIRARDELLI	$480,876	$455,129	$25,747	5.7	117,328	116,560	768	0.7	66.3	2.7	$ 4.10	$ 3.90	$ 0.20
PILLSBURY	$342,069	$326,368	$15,701	4.8	121,826	119,493	2,333	2	57.4	7.5	$ 2.81	$ 2.73	$ 0.08
BISQUICK	$336,987	$357,134	-$20,147	-5.6	59,543	69,211	(9,668)	-14	62.6	2.7	$ 5.66	$ 5.16	$ 0.50
MISS JONES BAKING CO	$248,341	$174,242	$74,100	42.5	36,778	29,585	7,193	24.3	40	3.4	$ 6.75	$ 5.89	$ 0.86
BOBS RED MILL	$240,493	$245,207	-$4,714	-1.9	45,931	48,273	(2,342)	-4.9	59.6	3.2	$ 5.24	$ 5.08	$ 0.16
NE TOP 10 BRANDS SUBTOTAL	**$5,119,331**	**$4,941,251**	**$178,080**	**3.6%**	**1,155,101**	**1,184,424**	**-29,324**	**-2.5%**					

- Baking Mixes, the 3rd largest subcategory in the Natural Channel, is growing 1.1% in $ volume to prior year in the Northeast, but is in decline in unit volume, at -4.2%.
- Specialty brand, Simple Mills is the leading brand within this segment with $895K in Subcategory $ volume, growing +3.5%, but saw a slight decline in unit volume of -0.5%.
- Private Label is not listed in the Top 10 Brands in Baking Mixes
- King Arthur and Miss Jones Baking are the fastest growing brands in dollar volume of the Top 10 Northeast Brands, with respective $ growth of 18.2% and 42.5%. Both brands also experienced unit growth over prior year.

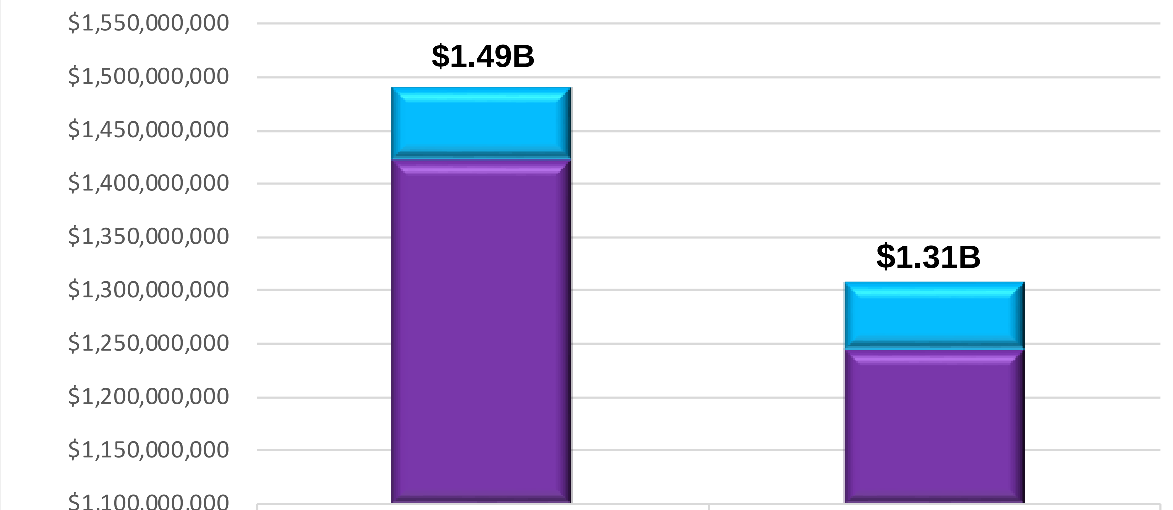
SPINS Satori – 52 weeks ending 12-31-23

Subcategory Performance
Shelf Stable Flours

SPINS Satori - 52 Weeks Ending 12-31-23

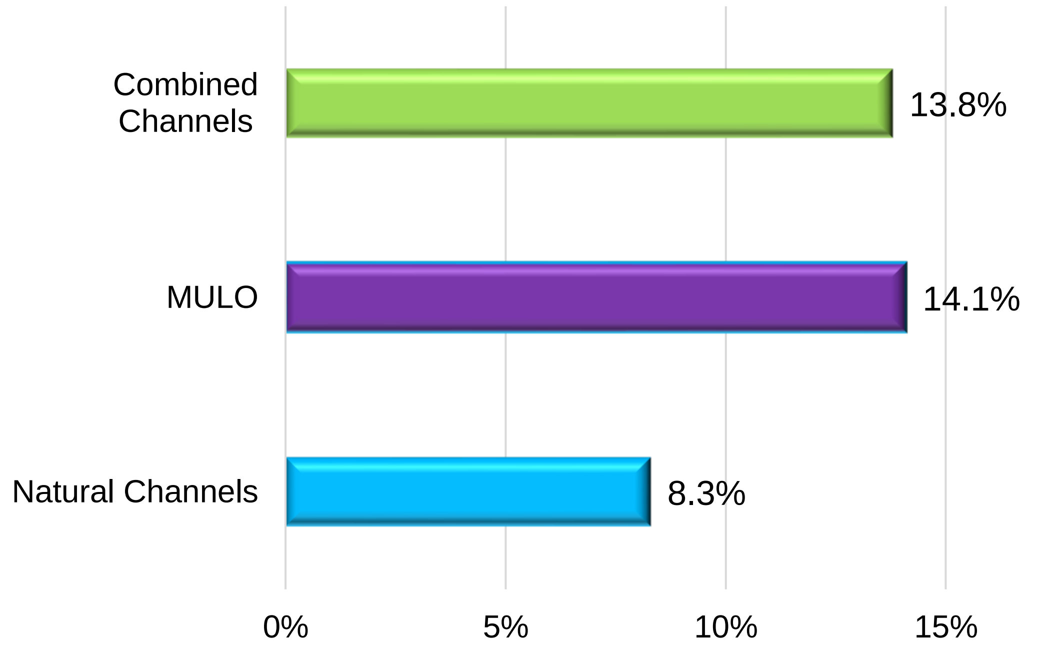
Total US Shelf Stable Flours Subcategory

Total US Dollars



	2023	2022
Natural	$68,082,579	$62,888,720
MULO	$1,422,634,941	$1,246,610,143

% Dollar Change vs Year Ago

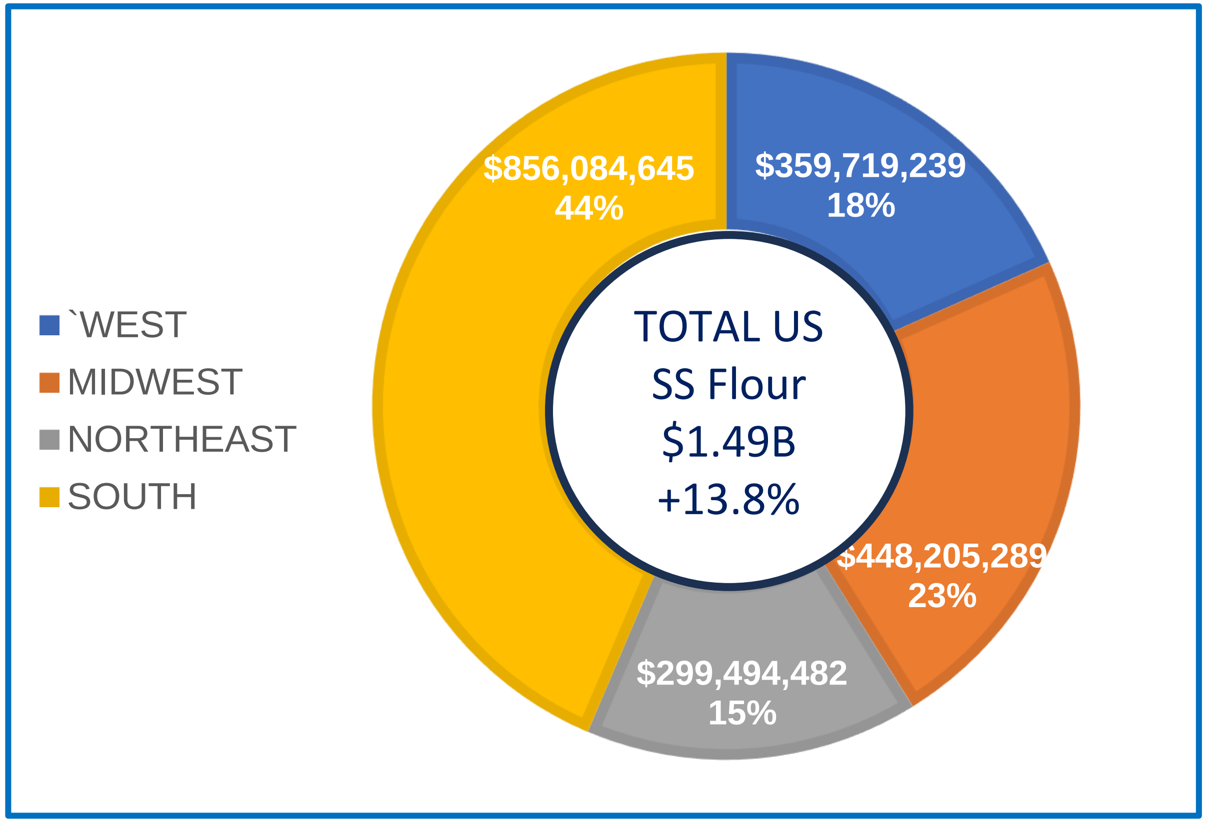


- Total US Shelf Stable Flours is a $1.49B subcategory and is performing better than prior year by 13.8%.
- Sales dollars were up in both the Natural Channel (+8.3%) and MULO (+14.1%).

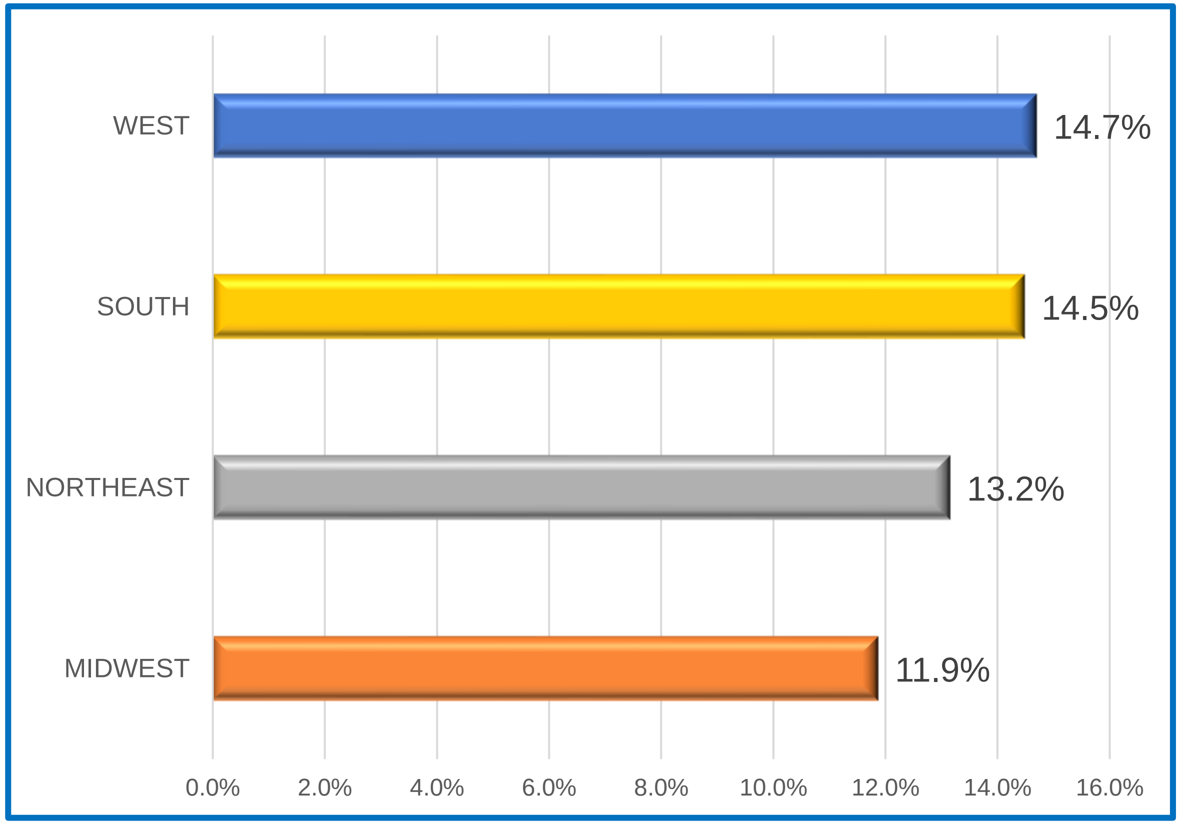
SPINS Satori – 52 weeks ending 12-31-23

Total US Shelf Stable Flours Subcategory – By Region

Total Dollars and % Category Share by Region



% Dollar Change vs Year Ago

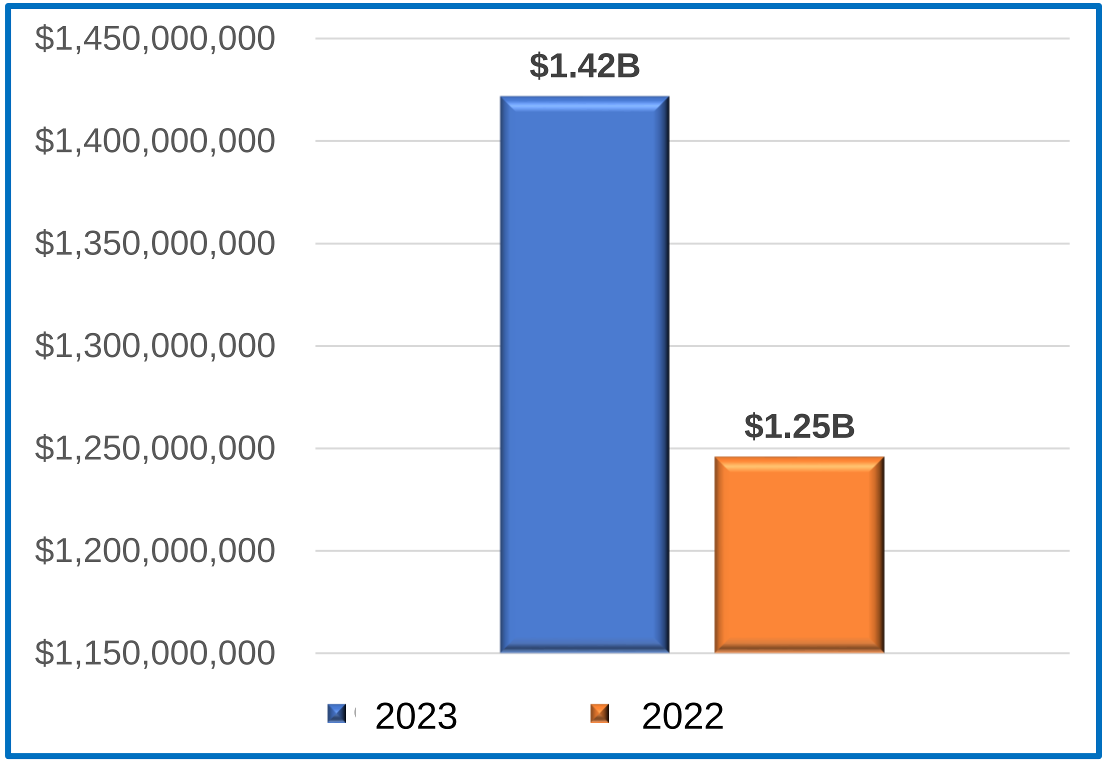


- The SS Flours subcategory has experienced the highest % growth over prior year of the 4 subcategories.
- The South region is the most highly developed region for this subcategory, responsible for 44% of $ volume with high growth, +14.5%.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining $ volume with respective growth of 14.7%, 13.2% and 11.9%.

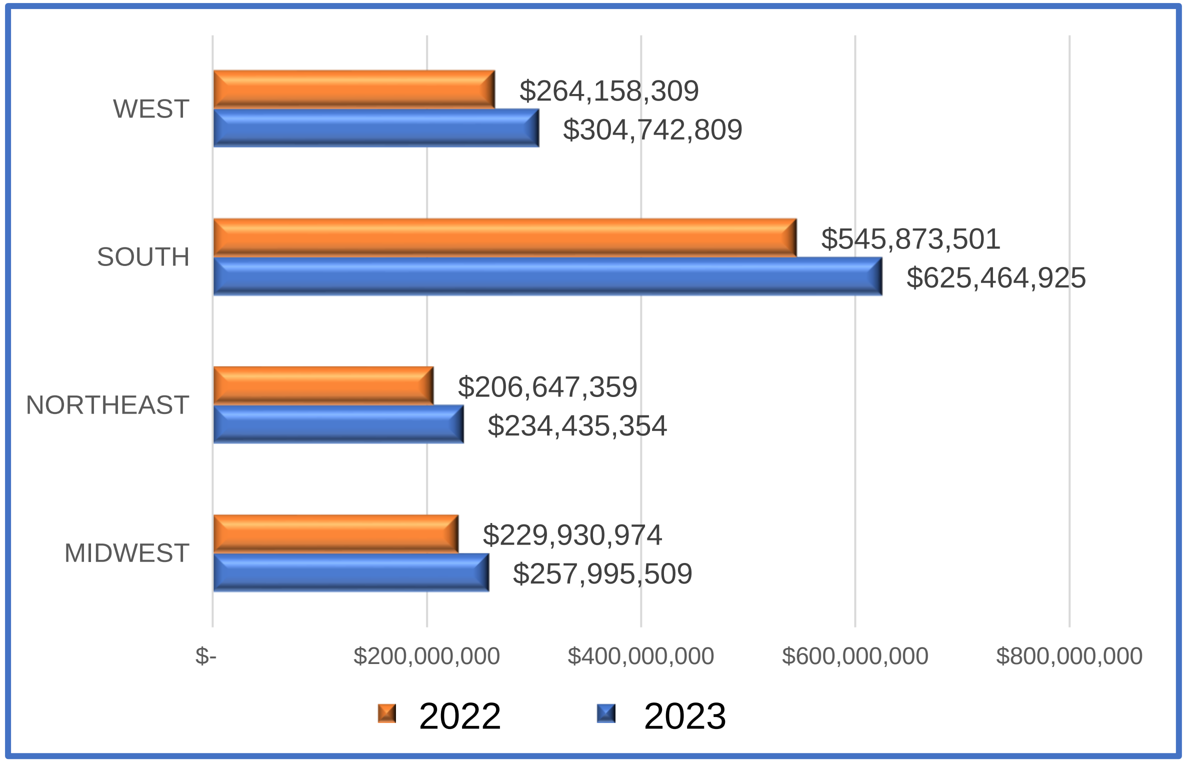
SPINS Satori – 52 weeks ending 12-31-23

MULO: Shelf Stable Flours Subcategory

MULO Total US Dollars



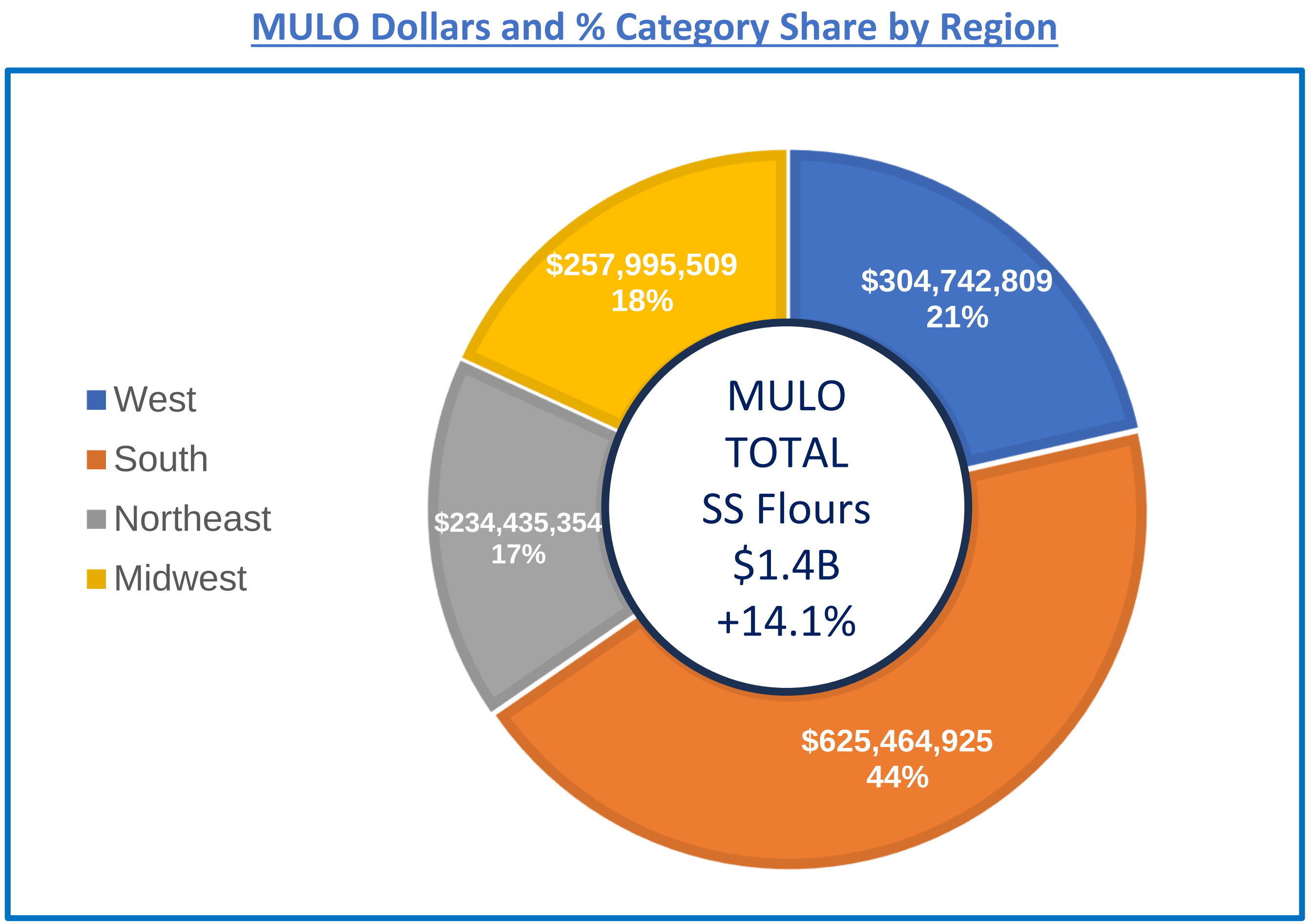
Dollar Change vs Year Ago

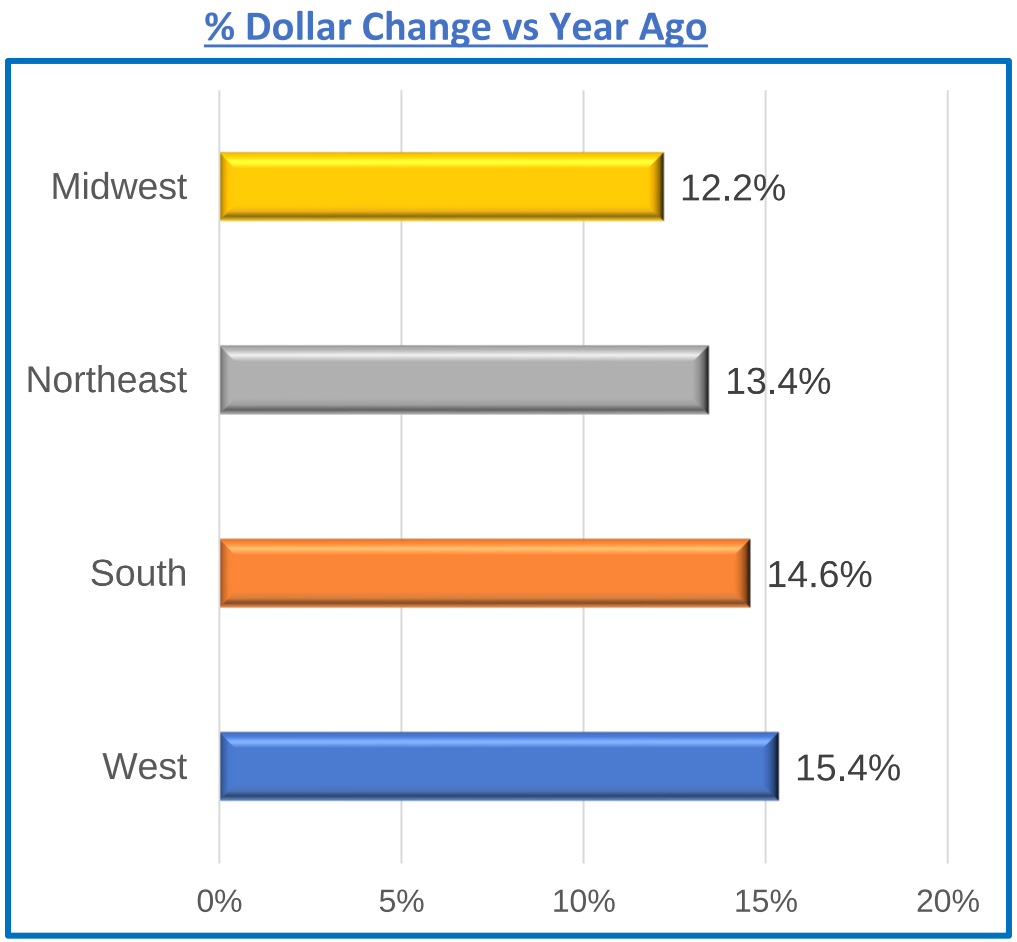


- Total US MULO $ volume for SS Flours subcategory is $1.42B and grew 14.1% over prior year.
- The South region is by far the largest $ volume region, followed by West, Midwest, and Northeast, respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year.

SPINS Satori – 52 weeks ending 12-31-23

MULO: Shelf Stable Flours Subcategory – By Region





- The South region is the most highly developed region for this sub-category, responsible for 44% of $ volume with growth of 14.6%
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining 56% of $ volume with respective growth of 15.4%, 13.4%, and 12.2%.

SPINS Satori – 52 weeks ending 12-31-23

MULO: Shelf Stable Flours – Top 10 Brands Northeast Census Region

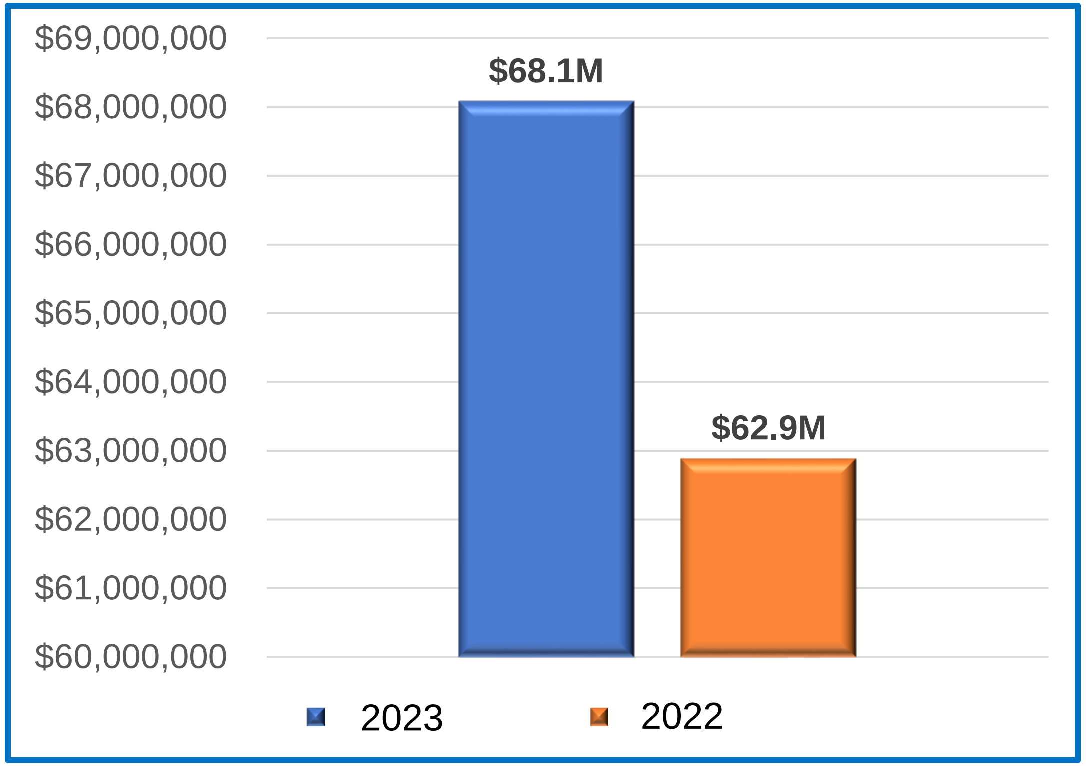
Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	Avg % ACV	Average Items Selling	ARP	ARP, Yago	ARP +/- Chg, Yago
NE SS FLOURS - MULO TOTAL	**$234,435,367**	**$206,647,359**	**$27,788,008**	**13.4**	**53,483,378**	**52,444,282**	**1,039,096**	**2**			**$4.38**	**$3.94**	**$0.44**
KING ARTHUR	$59,666,824	$50,359,742	$9,307,082	18.5	9,270,820	8,798,599	472,221	5.4	84.3	9.4	$6.44	$5.72	$0.71
PRIVATE LABEL	$47,651,219	$41,729,874	$5,921,345	14.2	16,439,403	15,754,326	685,077	4.3	89.5	2.3	$2.90	$2.65	$0.25
GOLD MEDAL	$38,597,798	$37,322,002	$1,275,797	3.4	8,305,354	9,429,276	-1,123,923	-11.9	90.7	4.1	$4.65	$3.96	$0.69
MASECA	$21,729,804	$15,660,016	$6,069,788	38.8	4,443,265	3,695,088	748,177	20.2	49.9	1.6	$4.89	$4.24	$0.65
BOBS RED MILL	$17,612,548	$17,115,798	$496,749	2.9	2,514,457	2,534,240	-19,783	-0.8	71.3	12.3	$7.00	$6.75	$0.25
PILLSBURY	$12,253,757	$11,328,986	$924,771	8.2	2,963,685	3,010,706	-47,021	-1.6	63	3	$4.13	$3.76	$0.37
GOYA	$6,215,371	$5,509,578	$705,794	12.8	2,123,071	2,051,039	72,032	3.5	53.6	5	$2.93	$2.69	$0.24
PAN	$4,525,834	$3,007,809	$1,518,026	50.5	892,159	628,656	263,504	41.9	28	2	$5.07	$4.78	$0.29
HECKERS	$2,480,932	$2,422,294	$58,638	2.4	625,396	638,865	-13,469	-2.1	18.8	2.1	$3.97	$3.79	$0.18
INDIAN HEAD	$2,226,826	$2,078,138	$148,688	7.2	1,139,876	1,151,766	-11,890	-1	60.1	1.6	$1.95	$1.80	$0.15
NE TOP 10 BRANDS SUBTOTAL	**$212,960,914**	**$186,534,236**	**$26,426,678**	**14.2%**	**48,717,485**	**47,692,562**	**1,024,923**	**2.1%**					

- The MULO SS Flours subcategory is fast growing in $ volume at 13.4% over prior year in the Northeast and is positive in Unit volume, +2%.
- Specialty Flour brand, King Arthur, is the #1 brand in the subcategory and is far exceeding the subcategory growth at 18.5% in $ volume and 5.4% in Unit volume.
- King Arthur, a brand that is premium priced compared with its competitive brand base, is solely responsible for 25% of total Flour subcategory $ volume.
- Bob's Red Mill, another specialty brand, ranks 5th among the Top 10 Northeast brands and is showing growth in $ volume, but a slight decline in Unit volume.
- Bob's Red Mill, like King Arthur, is priced significantly higher than mainstream competitor brands.

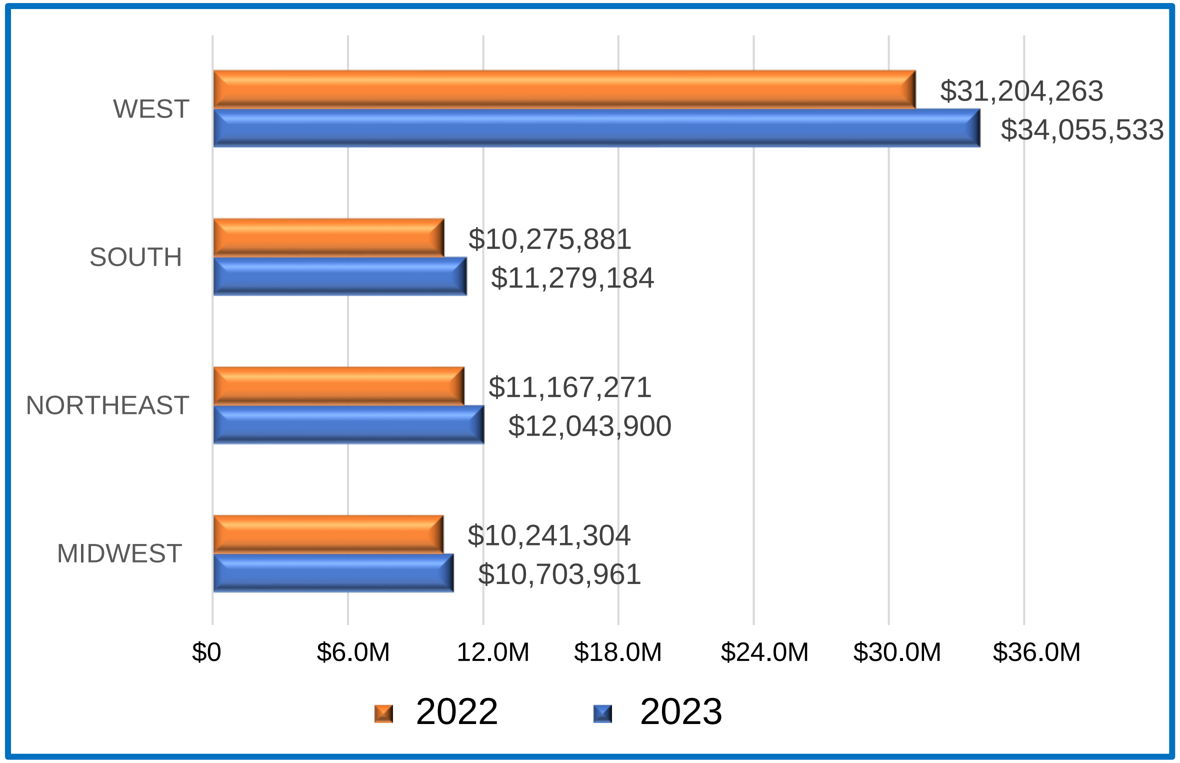
SPINS Satori – 52 weeks ending 12-31-23

Natural Channel: Shelf Stable Flours Subcategory

Natural Channel Total US Dollars



Dollar Change vs Year Ago

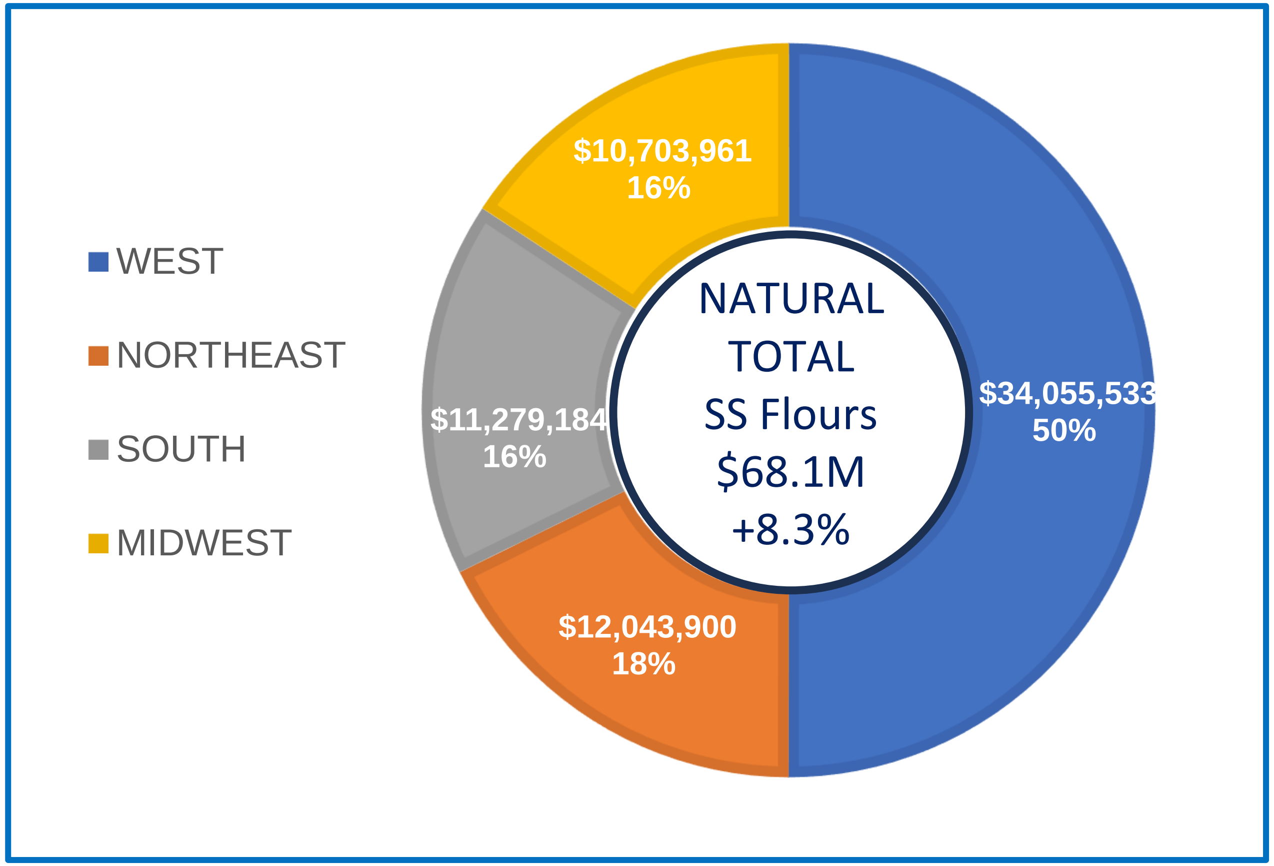


- Total Natural $ volume for the SS Flours subcategory is $68.1M and grew 8.3% over prior year.
- The West region is the largest $ volume region, followed by the Northeast, Midwest and South, respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year.

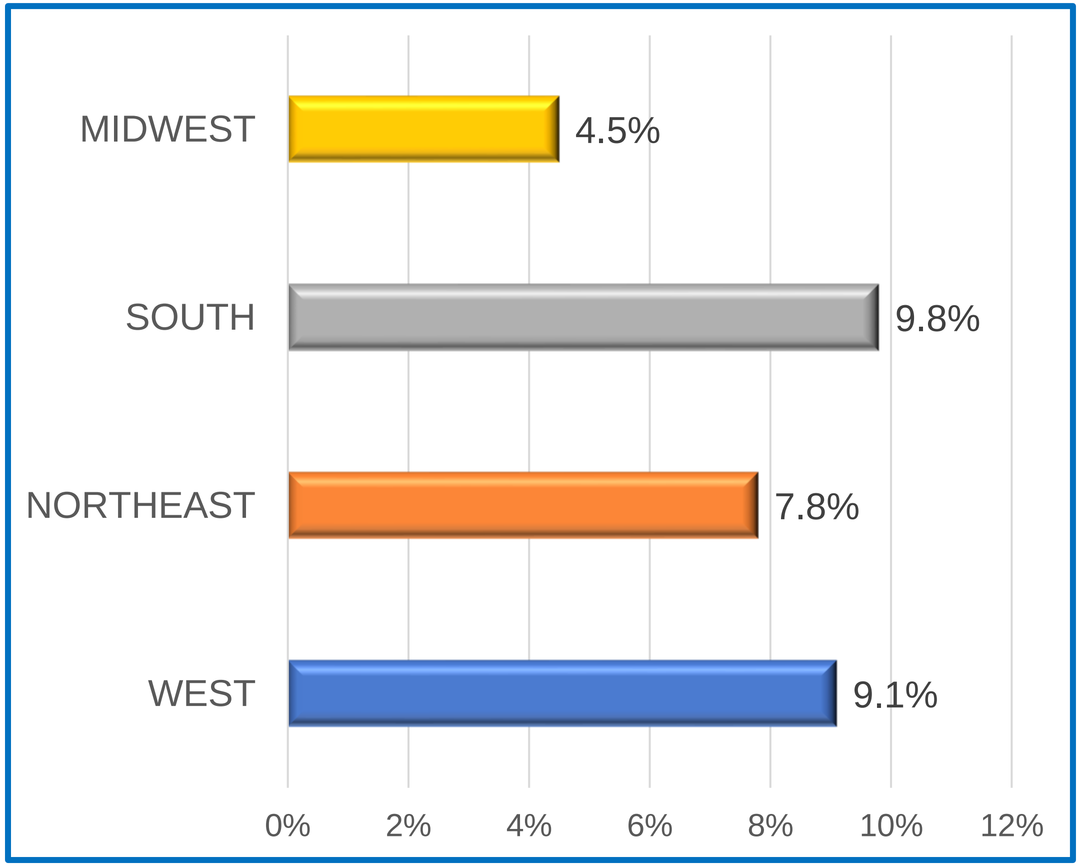
SPINS Satori – 52 weeks ending 12-31-23

Natural Channel: Shelf Stable Flours Subcategory – By Region

Natural Channel Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The West region is the most highly developed region for this subcategory, responsible for 50% of $ volume with growth of 9.1%.
- The 3 remaining regions, South, Northeast and Midwest are responsible for the remaining 50% of $ volume with respective growth of 9.8%, 7.8% and 4.5%.

SPINS Satori – 52 weeks ending 12-31-23

Natural Channel: Shelf Stable Flours – Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	Avg % ACV	Average Items Selling	ARP	ARP, Yago	ARP +/- Chg, Yago
NE SS FLOURS - NATURAL TOTAL	**$12,043,900**	**$11,167,271**	**$876,629**	**7.8**	**1,936,890**	**1,938,785**	**(1,896)**	**-0.1**			**6.22**	**5.76**	**$ 0.46**
BOBS RED MILL	$ 3,644,377	$ 3,539,008	$ 105,370	3.0	493,319	495,466	(2,147)	-0.4	96.8	18.9	7.39	7.14	$ 0.25
KING ARTHUR	$ 3,601,528	$ 3,301,336	$ 300,192	9.1	522,443	514,572	7,871	1.5	90.8	7.1	6.89	6.42	$ 0.47
GOLD MEDAL	$ 980,228	$ 893,818	$ 86,410	9.7	230,587	242,694	(12,107)	-5	63.9	4.1	4.25	3.68	$ 0.57
MASECA	$ 433,096	$ 371,053	$ 62,043	16.7	77,291	71,956	5,336	7.4	12.7	1.3	5.6	5.16	$ 0.44
PILLSBURY	$ 389,222	$ 343,517	$ 45,706	13.3	88,674	84,944	3,730	4.4	47.9	3	4.39	4.04	$ 0.35
ARROWHEAD MILLS	$ 321,632	$ 350,442	$ (28,809)	-8.2	54,190	65,394	(11,205)	-17.1	49.4	3.6	5.94	5.36	$ 0.58
FIELD DAY	$ 317,212	$ 205,314	$ 111,897	54.5	47,254	38,433	8,821	23	22.1	3.1	6.71	5.34	$ 1.37
JOVIAL	$ 287,603	$ 193,363	$ 94,239	48.7	33,613	27,063	6,550	24.2	37.3	1.6	8.56	7.14	$ 1.42
HECKERS	$ 260,540	$ 242,494	$ 18,046	7.4	64,175	62,633	1,542	2.5	38.5	2.1	4.06	3.87	$ 0.19
CUP4CUP	$ 177,444	$ 158,088	$ 19,356	12.2	10,585	10,739	(154)	-1.4	26	1.4	16.76	14.72	$ 2.04
NE TOP 10 BRANDS SUBTOTAL	**$10,412,882**	**$ 9,598,432**	**$814,450**	**8.5%**	**1,622,131**	**1,613,894**	**8,236**	**0.5%**					

- The Natural Channel SS Flours subcategory is growing in $ volume at 7.8% over prior year in the Northeast and is flat in Unit volume, -0.1%.
- Specialty flour brand, Bob's Red Mill, is the #1 brand in the subcategory with $3.6M in $ volume, up 3% over prior year, and is down -0.4% in Unit volume.
- King Arthur, the #2 specialty brand flour is directly behind Bob's Red Mill in $ Volume, growing 9.6% to prior year, but is also growing in Unit volume, +1.5% over prior year.
- Arrowhead Mills has the distinction of being the only Top 10 Northeast Brand that is in decline in $ volume over prior year, Unit volume is also the highest decline across the Top 10 Northeast Brands at -17.1%.

SPINS Satori – 52 weeks ending 12-31-23

Subcategory Performance

SS Pancake & Waffles Mixes

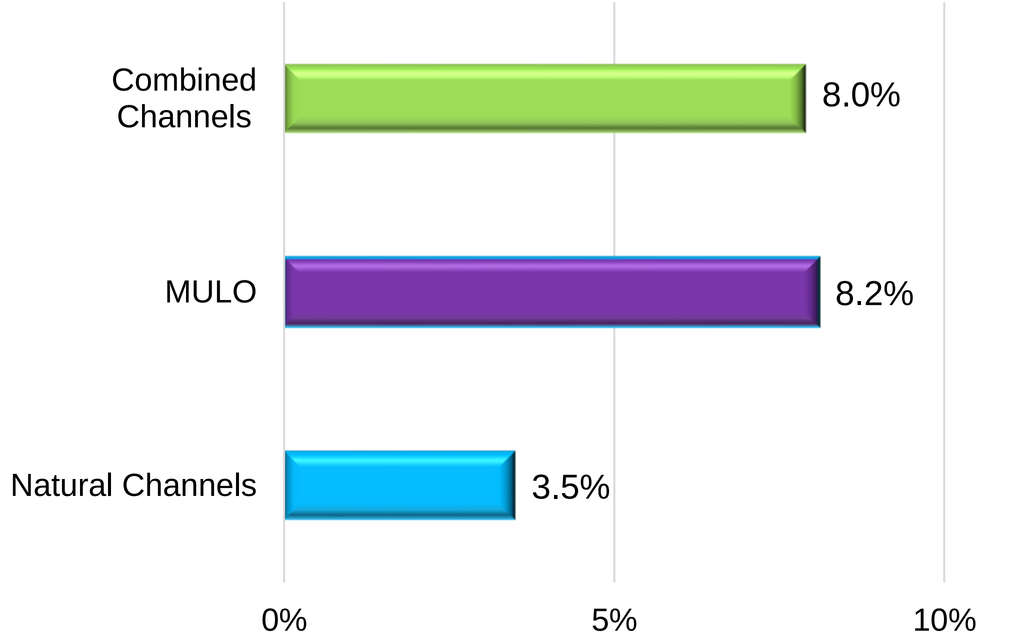
SPINS Satori - 52 Weeks Ending 12-31-23

Total US Shelf Stable Pancake & Waffle Mixes Subcategory

Total US Dollars

	2023	2022
Natural	$27,088,732	$26,167,636
MULO	$644,696,523	$596,401,333

% Dollar Change vs Year Ago

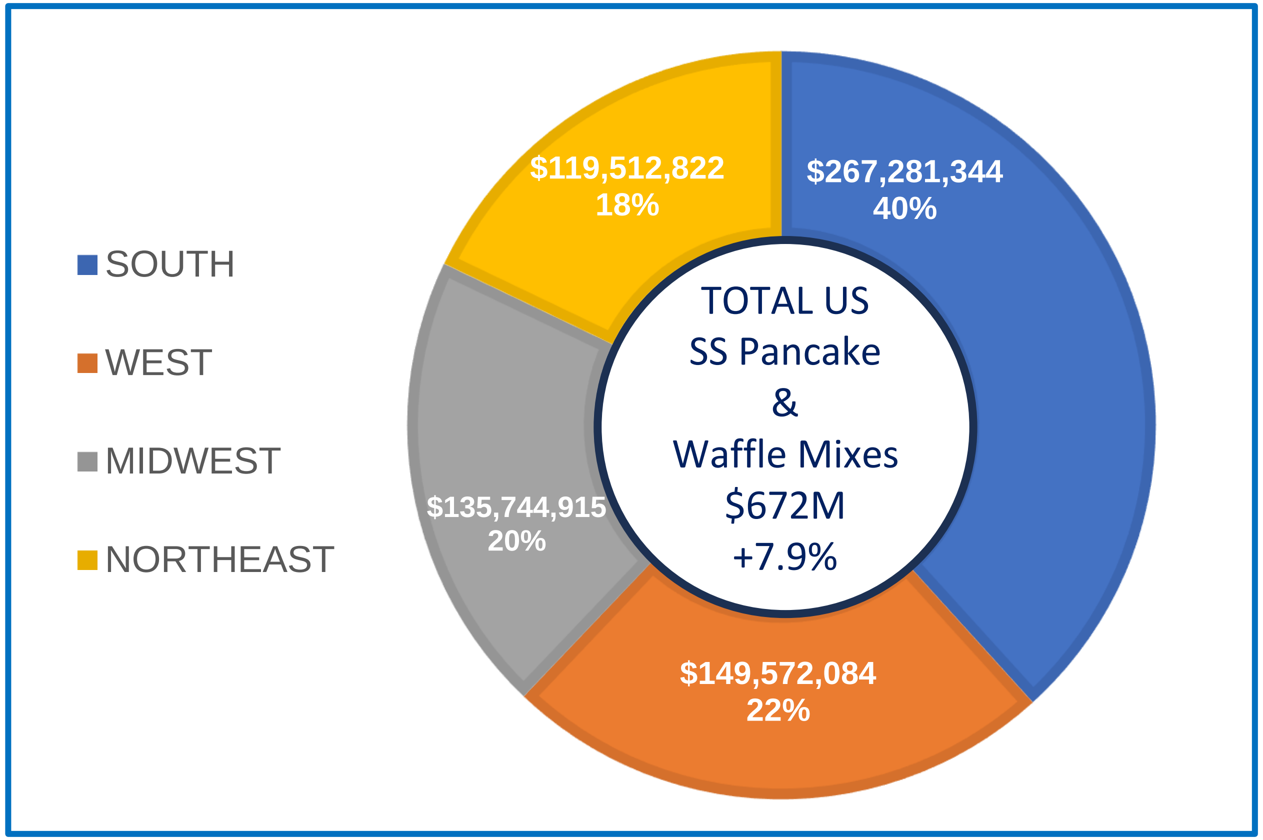


- The Total US Shelf Stable Pancake & Waffle Mixes is a $672M subcategory and is performing better than prior year by 7.9%.
- Sales dollars were up in both the Natural Channel (+3.5%) and MULO (+8.1%).
- As in most categories, MULO represents the majority of category sales.

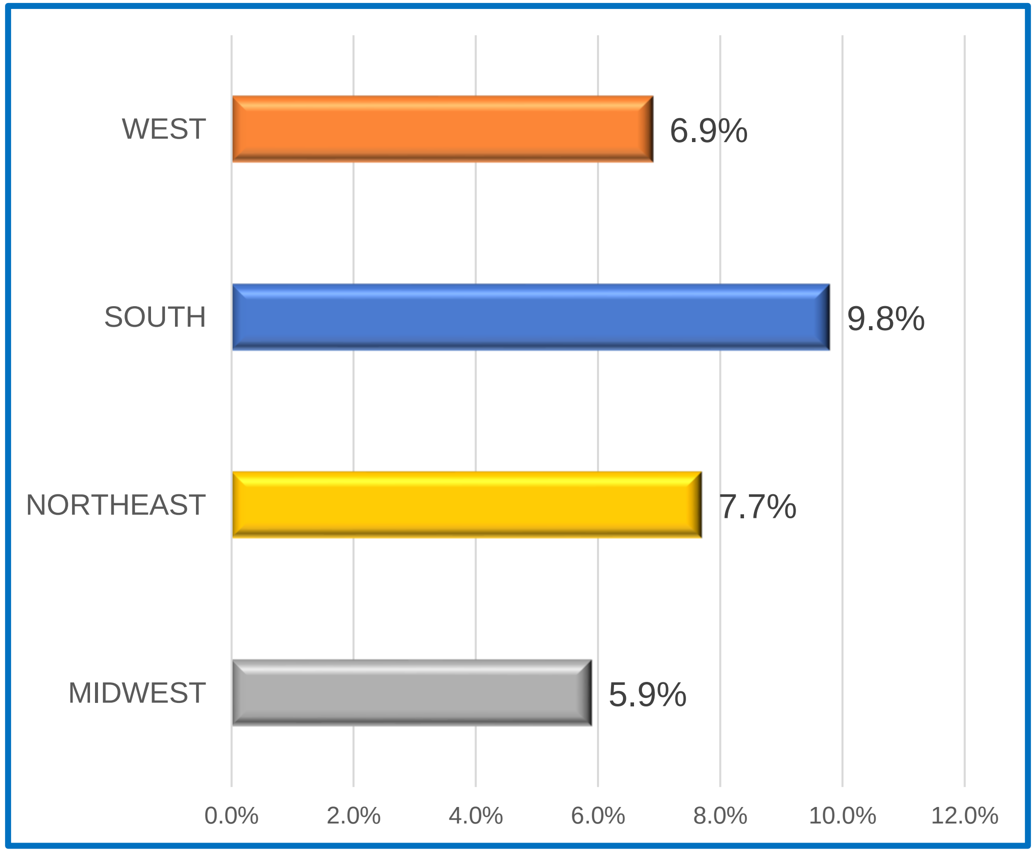
SPINS Satori – 52 weeks ending 12-31-23

Total US Shelf Stable Pancake & Waffle Mixes Subcategory – By Region

Total Dollars and % Category Share by Region



% Dollar Change vs Year Ago

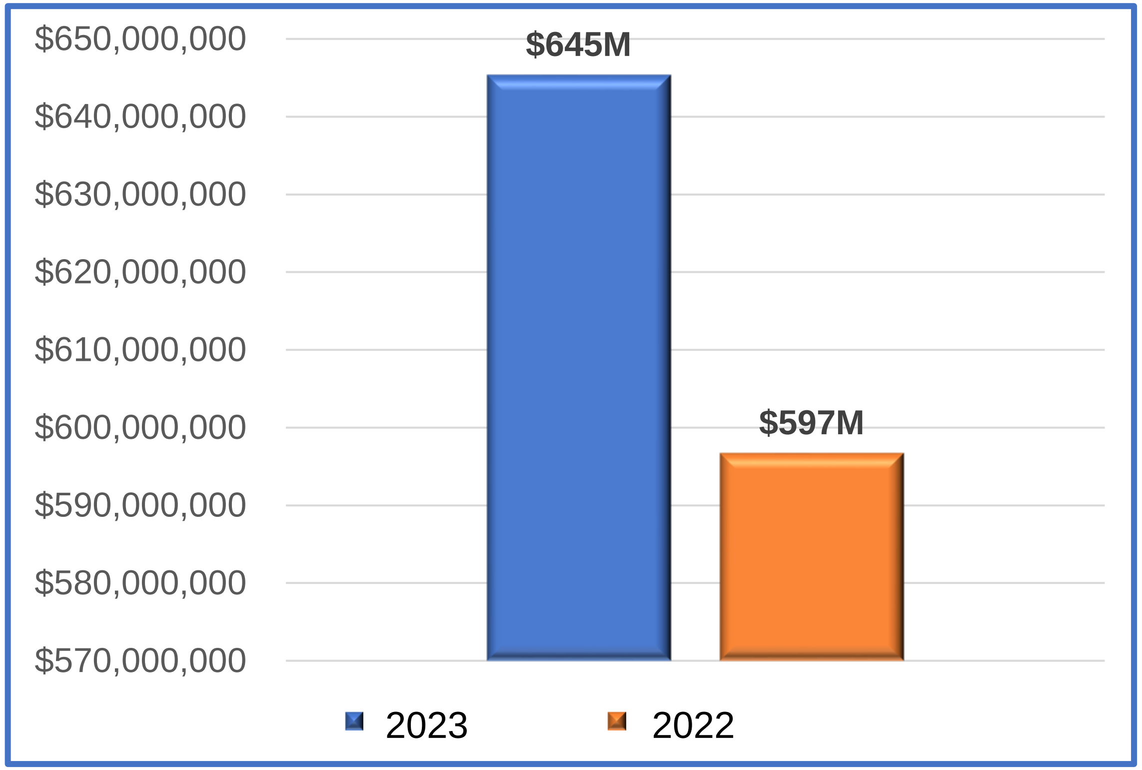


- The South region is the most highly developed region for this subcategory, responsible for 40% of $ volume with the highest growth, +9.8%
- The 3 remaining regions, Northeast, West and Midwest, are responsible for the remaining $ volume with respective growth of 7.7%, 6.9% and 5.9%.

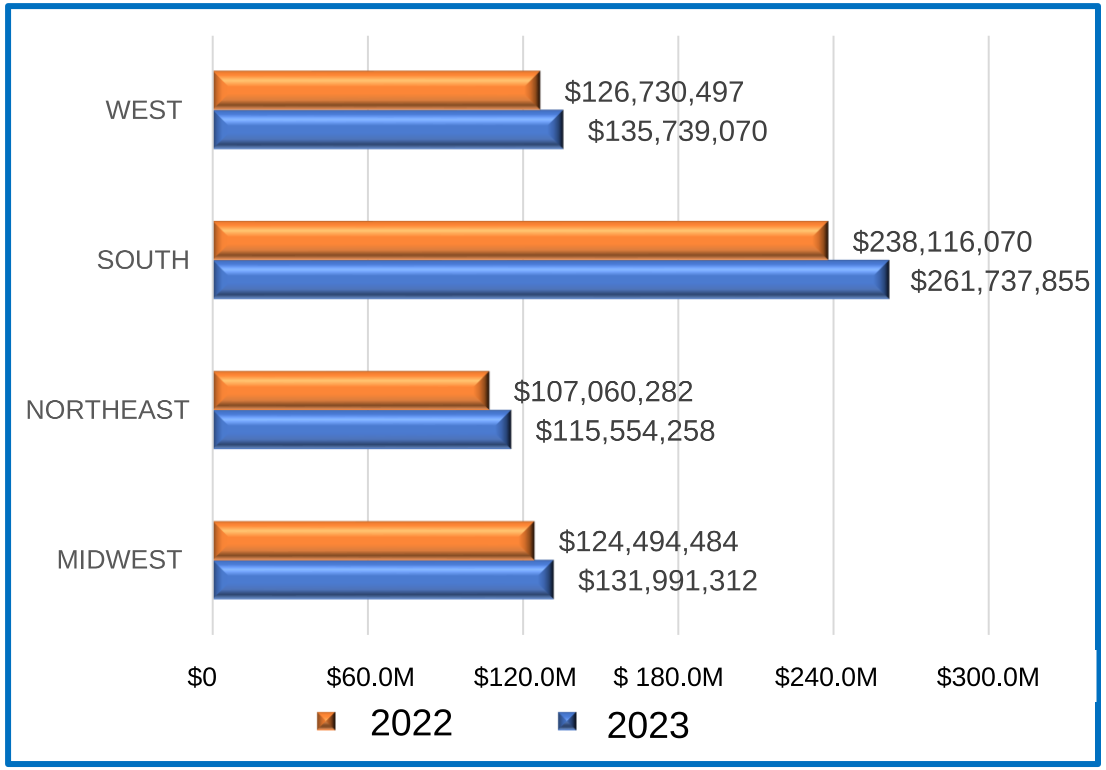
SPINS Satori – 52 weeks ending 12-31-23

MULO: Shelf Stable Pancake & Waffle Mixes Subcategory

MULO Total US Dollars



Dollar Change vs Year Ago

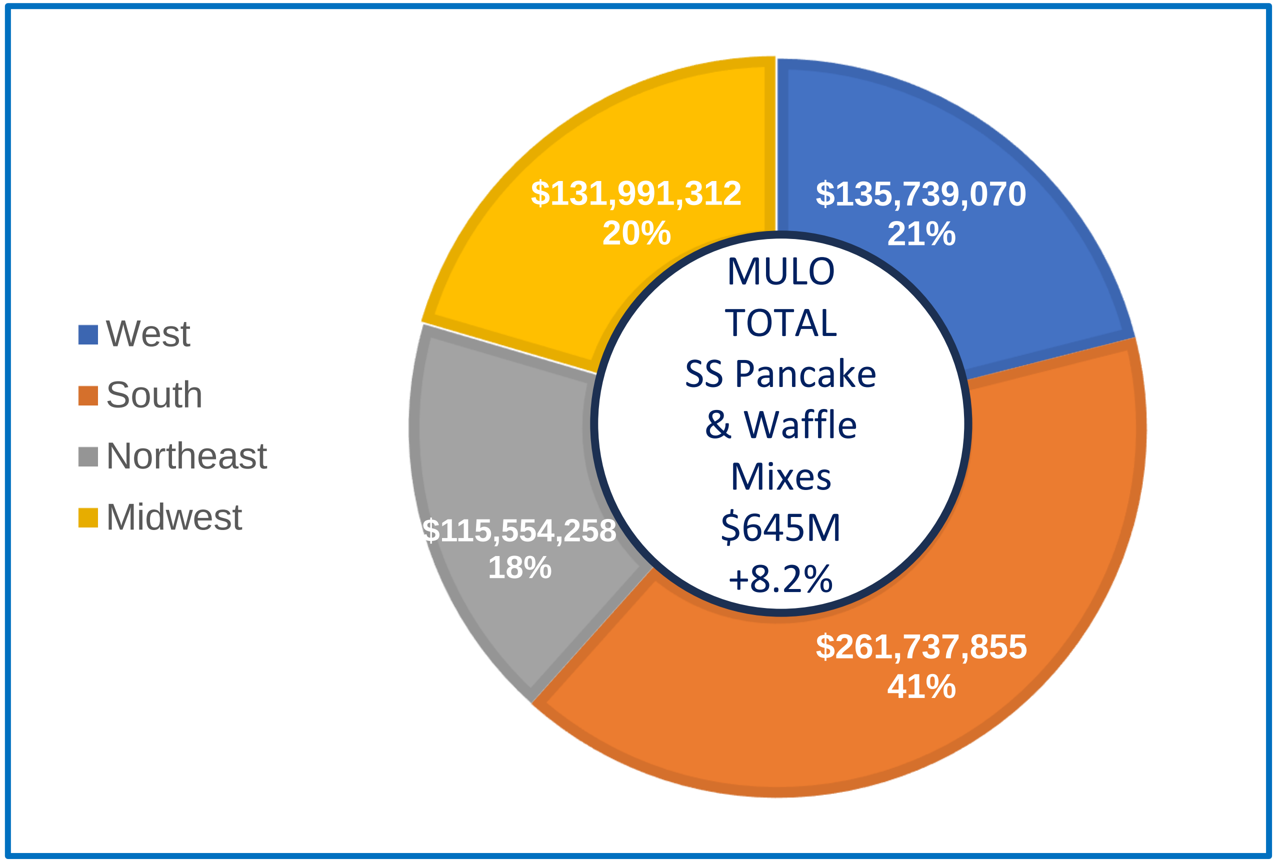


- Total US MULO $ volume for SS Pancake & Waffle Mixes subcategory is $645M and grew 8.2% over prior year.
- The South region is the largest $ volume region, followed by West, Midwest and Northeast, respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year.

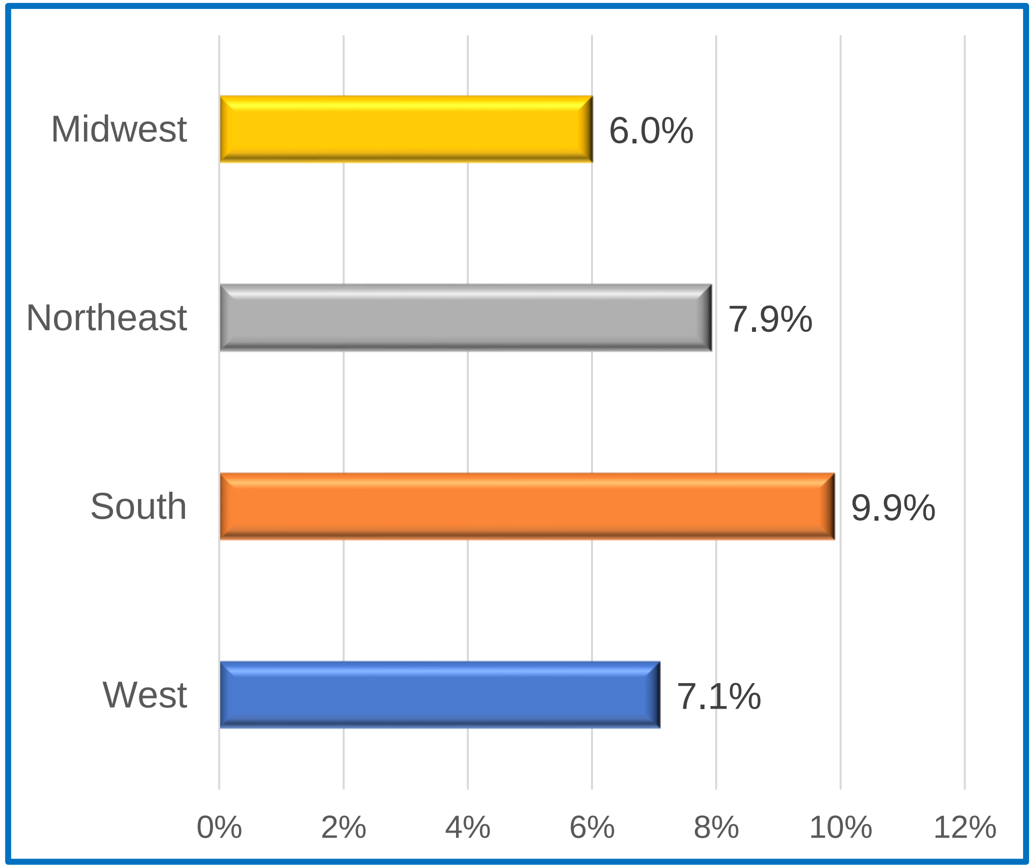
SPINS Satori – 52 weeks ending 12-31-23

MULO: Shelf Stable Pancake & Waffle Mixes Subcategory – By Region

MULO Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The South region is the most highly developed region for this subcategory, responsible for 41% of $ volume and is showing the highest $ volume growth of the 4 census regions at 9.9% to prior year.
- The 3 remaining regions, Northeast, West and Midwest, are responsible for the remaining 59% of $ volume with respective growth of 7.9%, 7.1% and 6.0%.

SPINS Satori – 52 weeks ending 12-31-23

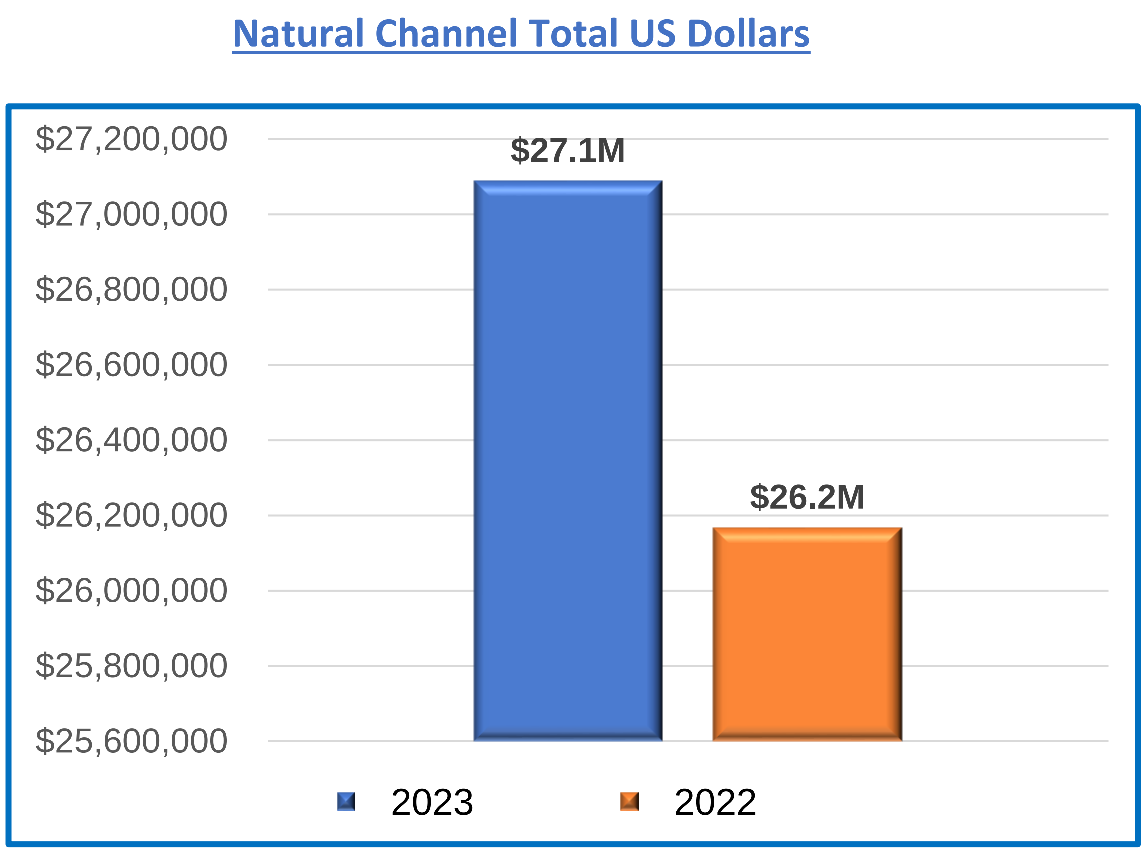
MULO: Shelf Stable Pancake & Waffle Mixes – Top 10 Brands Northeast Census Region

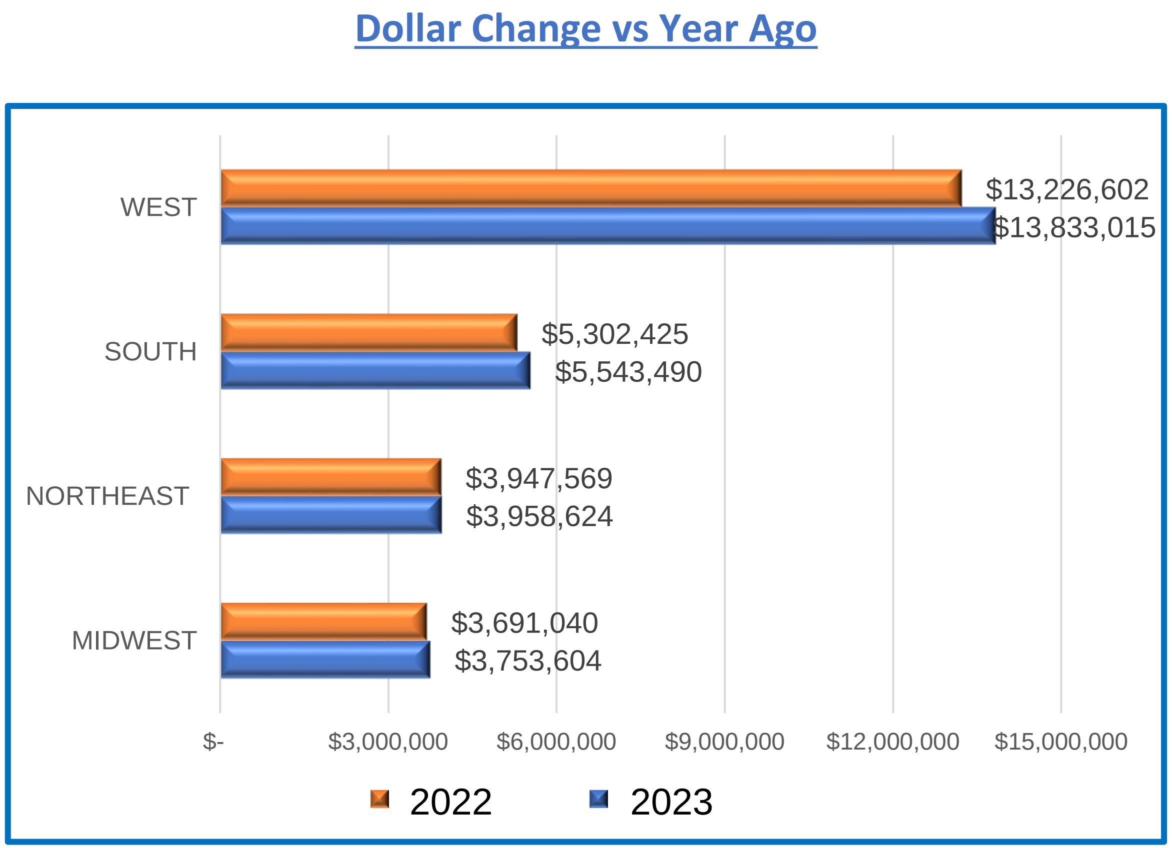
Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	Avg % ACV	Average Items Selling	ARP	ARP, Yago	ARP +/- Chg, Yago
NE SS PANCAKE & WAFFLE MIXES - MULO TOTAL	**$115,549,094**	**$107,060,282**	**$8,488,812**	**7.9**	**30,195,289**	**30,966,555**	**-771,266**	**-2.5**			**$3.83**	**$3.46**	**$0.37**
PEARL MILLING COMPANY	$36,730,056	$32,895,286	$3,834,770	11.7	9,572,572	9,901,951	-329,379	-3.3	88.1	5.6	$3.84	$3.32	$0.51
KODIAK CAKES	$19,515,668	$17,705,505	$1,810,163	10.2	4,225,125	4,042,896	182,229	4.5	80.9	6.5	$4.62	$4.38	$0.24
PRIVATE LABEL	$15,272,744	$11,942,338	$3,330,406	27.9	5,788,505	4,904,724	883,781	18	78.5	4.2	$2.64	$2.43	$0.20
KRUSTEAZ	$12,677,737	$11,057,762	$1,619,975	14.7	3,368,464	3,253,768	114,696	3.5	70.6	4.8	$3.76	$3.40	$0.37
BISQUICK	$6,228,115	$6,271,672	-$43,558	-0.7	1,780,549	2,136,221	-355,672	-16.6	71.2	1.7	$3.50	$2.94	$0.56
HUNGRY JACK	$5,307,578	$5,586,108	-$278,530	-5	1,843,776	2,148,101	-304,325	-14.2	60.5	2.2	$2.88	$2.60	$0.28
BIRCH BENDERS	$3,483,152	$3,628,529	-$145,377	-4	619,225	679,914	-60,689	-8.9	56.8	3.3	$5.63	$5.34	$0.29
BETTY CROCKER	$2,663,108	$2,813,914	-$150,806	-5.4	337,151	463,306	-126,155	-27.2	11	1	$7.90	$6.07	$1.83
KING ARTHUR	$2,146,381	$1,579,210	$567,171	35.9	416,728	312,228	104,500	33.5	45.6	1.7	$5.15	$5.06	$0.09
BOBS RED MILL	$1,464,295	$1,350,252	$114,042	8.4	268,604	266,425	2,178	0.8	32.5	2.3	$5.45	$5.07	$0.38
NE TOP 10 BRANDS SUBTOTAL	**$105,488,833**	**$94,830,576**	**$10,658,257**	**11.2%**	**28,220,697**	**28,109,532**	**111,164**	**0.4%**					

- Pancake & Waffle Mixes is the smallest subcategory $ volume, posting $ sales at $116M in the Northeast.
- Pearl Milling, formerly know as the Aunt Jemima brand, is the leading Northeast brand with $37M in volume, growing 11.7%, but in decline in Unit volume-3.3%.
- Kodiak Cakes, a Specialty brand in this segment, commands 2nd place for overall $ volume, growing 10.2% and in Unit volume, +4.5%.
- Birch Benders, another Specialty brand, ranks 7th in overall subcategory $ volume, with -4.0% decline in $ volume and -8,9% in unit volume.
- King Arthur, premium specialty, ranks 9th in subcategory $ volume but is posting high $ volume and unit volume growth, + 36% and +34% respectively.

SPINS Satori – 52 weeks ending 12-31-23

Natural Channel: Shelf Stable Pancake & Waffle Mixes Subcategory



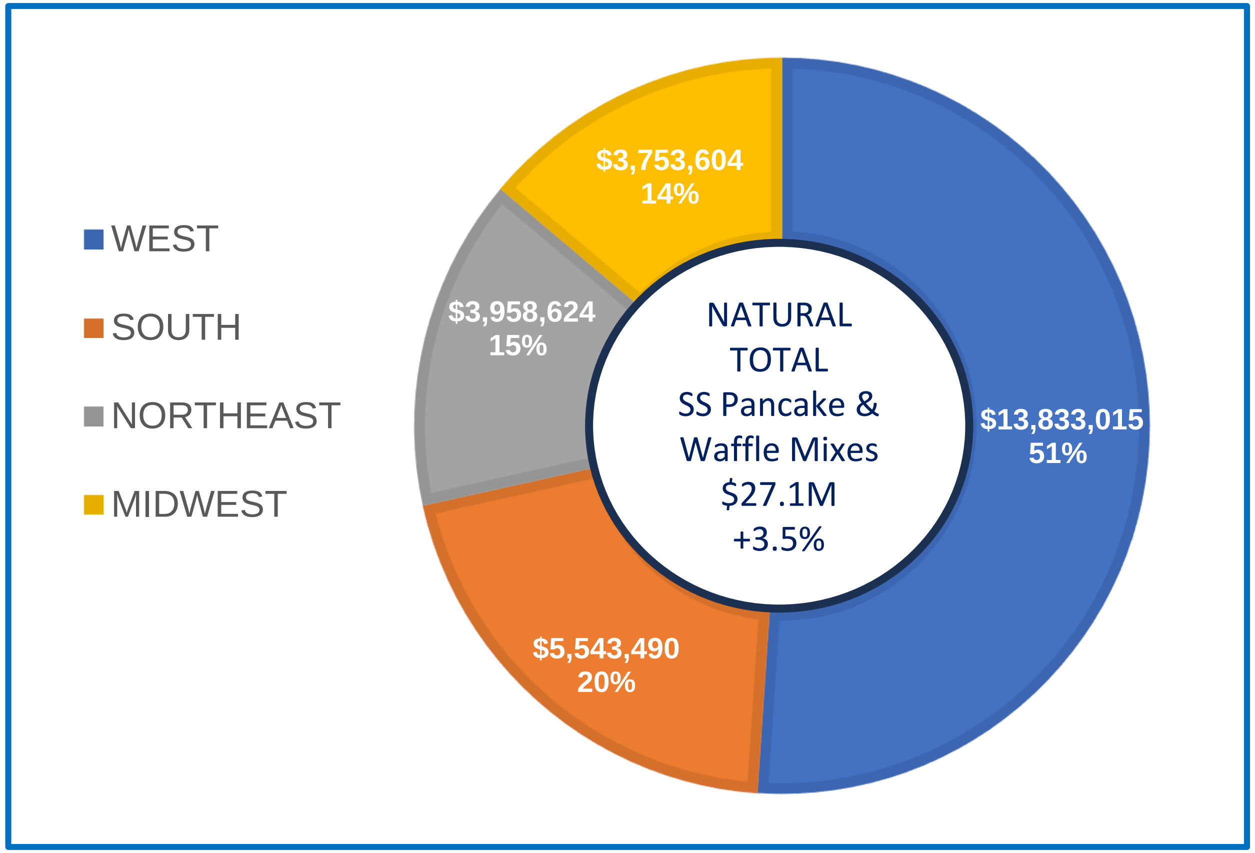


- Total Natural $ volume for the SS Pancake & Waffle Mix subcategory is $27.1M and grew 3.5% over prior year.
- The West region is the largest $ Volume Region, followed by the South, Northeast and Midwest respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year.

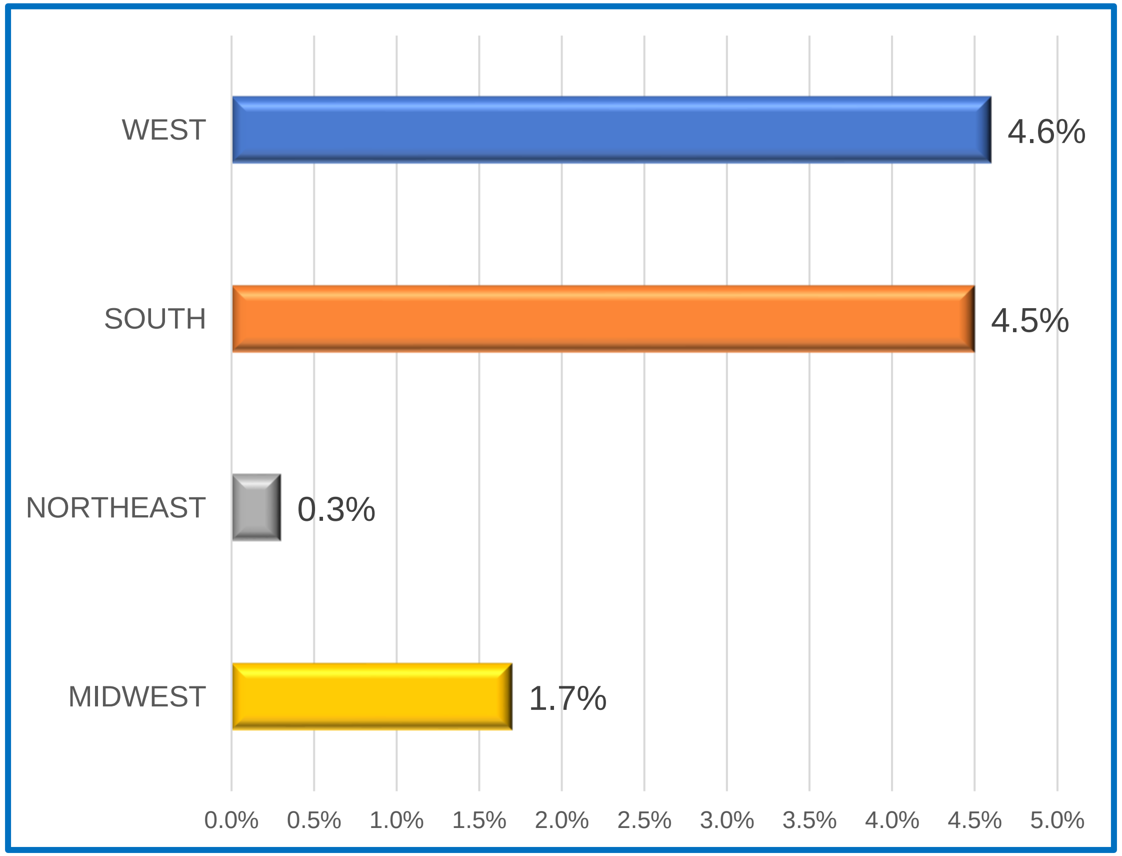
SPINS Satori – 52 weeks ending 12-31-23

Natural Channel: Shelf Stable Pancake & Waffle Mixes – By Region

Natural Channel Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The West region is the most highly developed region for this subcategory, responsible for 51% of $ volume and is showing the highest $ volume growth of the 4 census regions at 4.6% to prior year.
- The 3 remaining regions, South, Midwest and Northeast are responsible for the remaining 49% of $ volume with respective growth of 4.5%, 1.7% and 0.3%.

SPINS Satori – 52 weeks ending 12-31-23

Natural Channel: Shelf Stable Pancake & Waffle Mixes – Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	Avg % ACV	ARP	ARP, Yago	ARP +/- Chg, Yago
NE SS PANCAKE & WAFFLE MIXES - NATURAL TOTAL	**$3,958,624**	**$3,947,569**	**$ 11,055**	**0.3**	**648,677**	**701,969**	**(53,292)**	**-7.6**		**$ 6.10**	**$ 5.62**	**$ 0.48**
PEARL MILLING COMPANY	$ 649,566	$ 632,973	$ 16,593	2.6	140,638	160,570	(19,932)	-12.4	58.7	$ 4.62	$ 3.94	$ 0.68
BIRCH BENDERS	$ 582,168	$ 526,958	$ 55,210	10.5	100,076	97,807	2,269	2.3	65.1	$ 5.82	$ 5.39	$ 0.43
STONEWALL KITCHEN	$ 481,027	$ 571,505	$ (90,478)	-15.8	46,737	59,839	(13,102)	-21.9	46.6	$ 10.29	$ 9.55	$ 0.74
KODIAK CAKES	$ 406,152	$ 403,790	$ 2,362	0.6	72,071	74,869	(2,798)	-3.7	55	$ 5.64	$ 5.39	$ 0.25
BOBS RED MILL	$ 289,002	$ 273,169	$ 15,833	5.8	47,917	47,375	542	1.1	57.6	$ 6.03	$ 5.77	$ 0.26
PAMELAS	$ 273,567	$ 266,112	$ 7,454	2.8	18,595	21,124	(2,529)	-12	25.1	$ 14.71	$ 12.60	$ 2.11
SIMPLE MILLS	$ 253,632	$ 212,750	$ 40,882	19.2	30,880	26,797	4,083	15.2	41.4	$ 8.21	$ 7.94	$ 0.27
KING ARTHUR	$ 219,786	$ 184,259	$ 35,527	19.3	39,159	34,497	4,662	13.5	34.9	$ 5.61	$ 5.34	$ 0.27
ARROWHEAD MILLS	$ 191,812	$ 211,941	$ (20,129)	-9.5	30,645	35,120	(4,475)	-12.7	32.4	$ 6.26	$ 6.03	$ 0.23
MAPLE GROVE FARMS	$ 113,356	$ 134,402	$ (21,046)	-15.7	20,777	27,888	(7,111)	-25.5	43.4	$ 5.46	$ 4.82	$ 0.64
NE TOP 10 BRANDS SUBTOTAL	**$3,460,067**	**$3,417,859**	**$ 42,207**	**1.2%**	**547,495**	**585,885**	**(38,391)**	**-6.6%**				

- SS Pancake & Waffle Mixes is the smallest subcategory, posting $4M sales in the Northeast and is growing slightly, +0.3%.
- Pearl Milling, formerly know as the Aunt Jemima brand, is the leading Northeast brand in the subcategory with $649K in volume, growing 2.6%, but in decline in Unit volume, -12.4%.
- Birch Bender, a Specialty brand in this segment, commands 2nd place for overall $ volume, growing 10.5% and in Unit volume, +2.5%.
- King Arthur, premium specialty, ranks 8th in subcategory $ volume but is posting high $ volume and unit volume growth, +19.3% and +13.5% respectively.

SPINS Satori – 52 weeks ending 12-31-23

Retail Shelf Stable Baking Mixes, Ingredients & Flour Category & Subcategory Report

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