Instant Hot Snacks

Category Report – June 2025

Summary

Beyond the Field

- Market in UK growing rapidly with 35% more servings of instant noodles
- Pot Noodle leveraging its category leadership with branded bays and off-fixture displays
- Opportunities exist for challenger brands to establish the category in other permanent and display locations around the store

Store Observations

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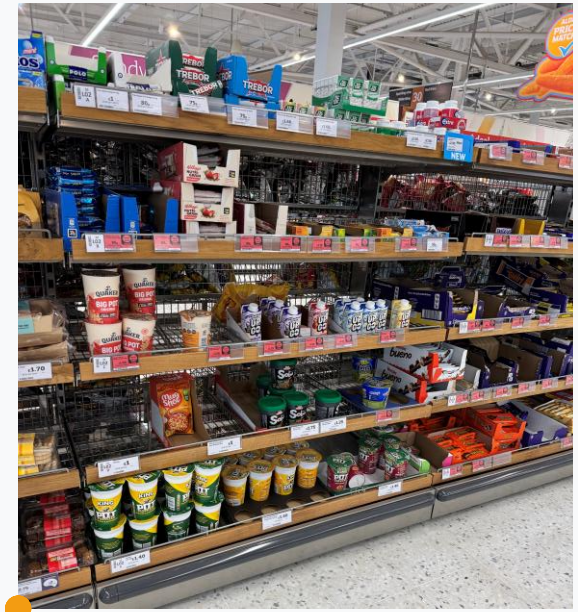
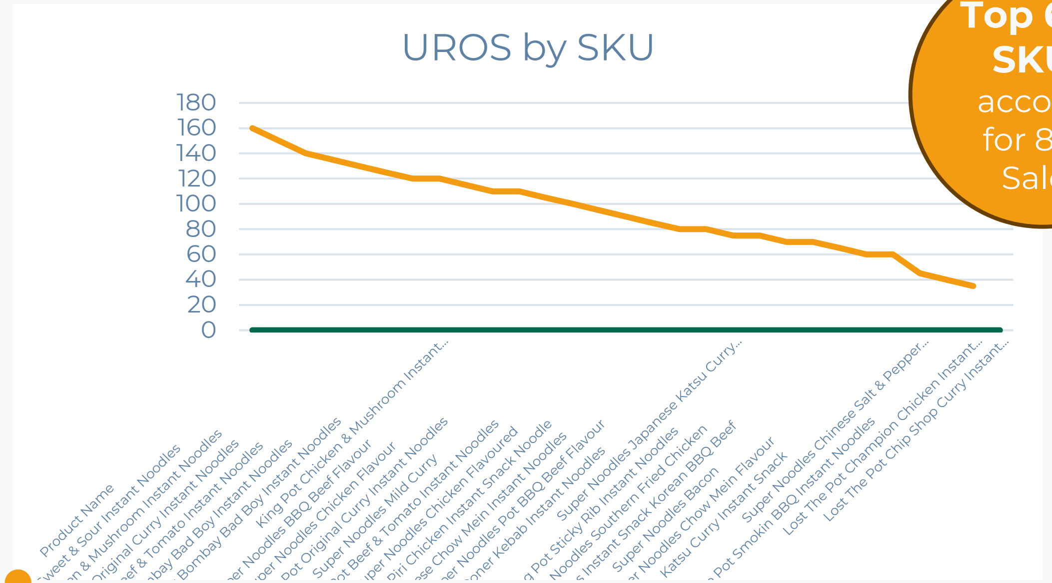
- Fixtures are generally consistent across retailers, with the category often located alongside other simple meal solutions, e.g. microwaveable rice
- Pot Noodle and Batchelor's brands dominate the fixture, with challenger brands merchandised together making it harder for them to achieve a strong shelf presence



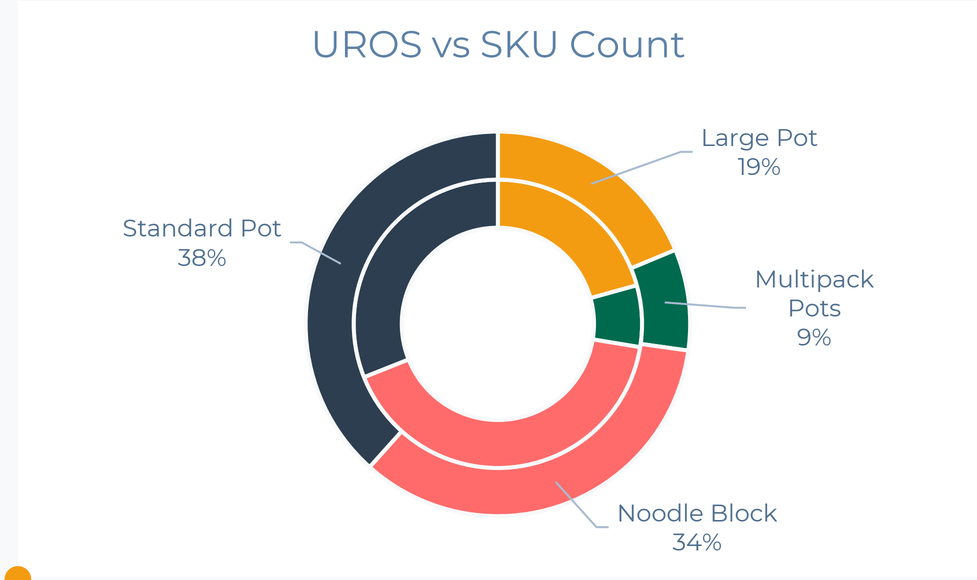
- Sainsbury's have created space within their Food to Go area for secondary placements of noodle pots

Brand & SKU Performance

Beyond the Field



Top 68% SKUs account for 80% Sales



- Incremental returns from adding range continue some way down the tail
- Some pack-size duplication noted which could be used to retain choice while reducing SKU count

- Standard Pots over-index and remain the most popular format in the category
- Noodle blocks showing signs of decline, presenting opportunities to scale back range
- Space could be prioritised to grow Multipacks which drive high cash ROS

NOTE: This data is synthesized by generative AI and should be seen as a genuine indication of the market

Promotional Activity

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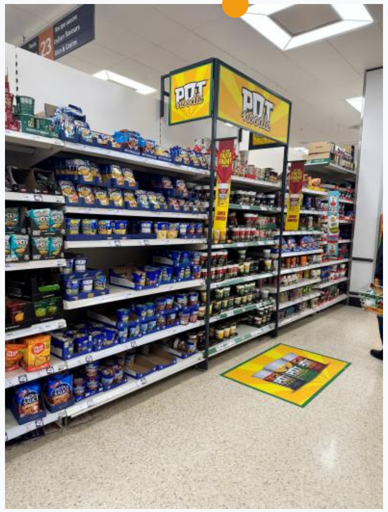
- With regular new flavours and formats, the category is regular seen using pre-filled displays as secondary locations

- In addition, stores supplement these displays with their own ones in discretionary space

- The strength of the Pot Noodle brand makes it ideal for gondola end activations, seen here using a Retail Media Network package for execution



- The brand is also using RMN features in aisle to act as beacon for the category and protect its space

Off-Fixture Displays

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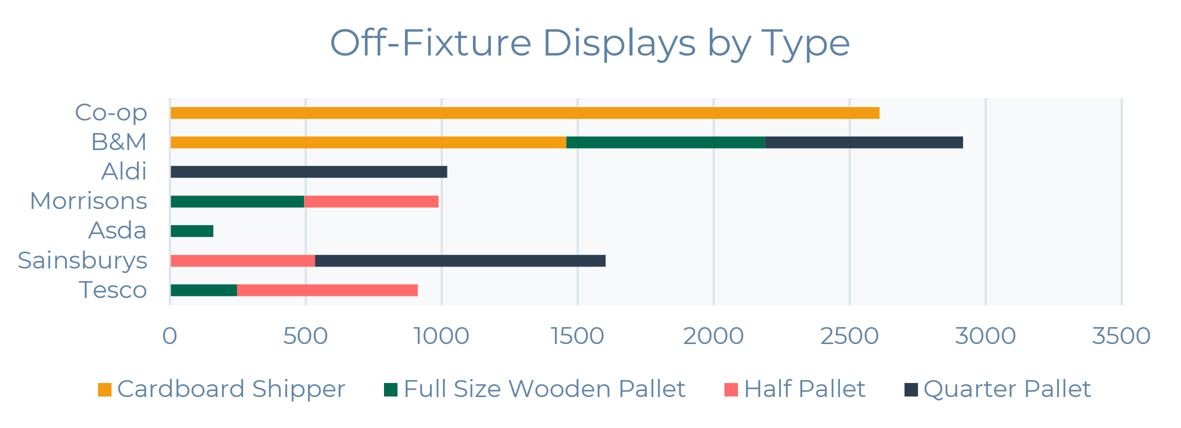

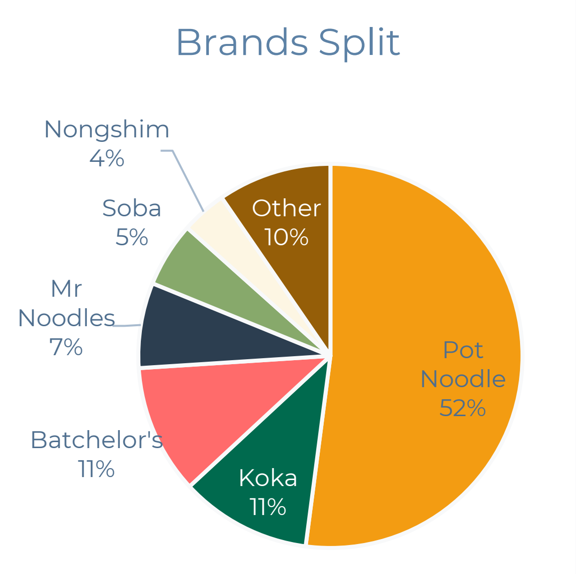

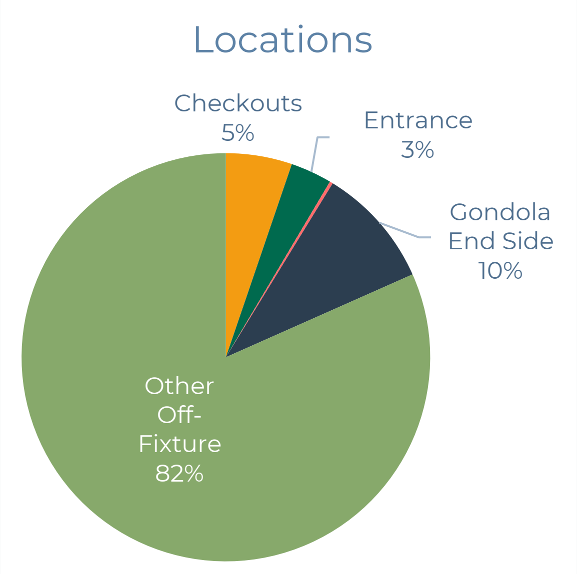

- As category leader, Pot Noodle have the most off-fixture displays and are some way ahead of their nearest competitors
- B&M use a lot of feature space for this category to encourage impulse purchases in their Grocery aisles – generally featuring tertiary brand, oriental style, noodle pots in Dump Bins
- In-aisle and other off-fixture displays are the most used locations – there is potential for Checkouts and Entrance sites to be used more for brands who are HFSS compliant and wishing to grow sales through impulse shoppers

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