



Happiness is Whitworths

Industry Sector
Food Producers

Client Company
Napier Brown Sugar Ltd.

Design Consultancy
Brandpoint

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EXECUTIVE SUMMARY

Three years ago, sugar was a rather sad place for many. For the shopper, the packs split in-store and the two big brands Tate & Lyle and Silver Spoon weren't helping us to enjoy and do more with sugar in our kitchens. We had just rediscovered home baking because, during the recession, we learned to enjoy the simple things in life and spend time with those we love. The UK retailers were restless and concerned about the value decline of a significant category.

Napier Brown (an independent sugar distributor with a passion for sourcing sugar from around the world) saw an opportunity to help us do more with sugar and the possibility of turning a commodity product into a valuable ingredient.

They also owned a brand. Whitworths sugar had been neglected for many years, had low awareness and by 2012, UK sugar buyers and consumers saw little attraction to buy other than low pricing.

Napier Brown wanted to sell more retail sugar volume through both the Whitworths brand and retailer brand; a lot more in fact at nearly 3 times as much by 2017.

Brandpoint's recipe of insight, clear brand strategy, rebranding, packaging design and great teamwork to deliver a defensible brand and range that grew from £8m to a phenomenal £48m in 3 years, in a declining market.

The increase was welcome in a deprived area of West Yorkshire - enabling new investments in the operation and hiring an additional labour force of 80.

The rebranding was essential in persuading 3 out of the 4 top retailers to stock Whitworths and played a role in Napier Brown gaining retailer brand business. The recipe for success: inspiring and re-engaging consumers with the simple pleasures of homemade happiness with great little ideas.

Words: 289

SINCE THE REBRAND...

SALES HAVE
INCREASED
FROM



WHITWORTHS
HAS BEEN THE
**FASTEST
GROWING**
SUGAR BRAND FOR THE
PAST 3 YEARS



**VALUE
SALES**
HAVE INCREASED BY
489%
SINCE 2012

PROJECT OVERVIEW

PROJECT BRIEF

Business Objectives

- ★ Grow sales volumes of retail sugar by a challenging 185% by 2017
- ★ Revive the Whitworths brand with a range of added value sugars
- ★ Significantly increase the customer base beyond two discounters

Scope

This project needed a blend of strategy and design execution because the open brief invited a big idea.

Our client shared the business objectives and three brand deliverables: reposition and revive the Whitworths brand, focus on home baking and review packaging structure. For strategy, we carefully positioned and built a competitive, engaging brand proposition. For design creation we rebranded, creating a brand book and anthem, new packaging design structures and graphics for ranges of baking and everyday sugars as well as a consumer website.

About Napier Brown

An independent distributor of sugar, meaning that they do not refine sugar. Instead, they source different sugars, cane and beet from all around the world. They select, sieve, prepare and pack the different sugars for the UK food industry and, to a lesser extent back in 2012, for consumers through UK retailers. Napier Brown was then part of a mid-sized AIM-listed food group Real Good Food plc. This independence and freedom from refining would allow Napier Brown to become a challenger to the two dominant refining players in the UK (AB Sugar / Silver

Spoon Company and Tate & Lyle). Whitworths Sugar (the retail part of Napier Brown) would only succeed if they could add value and a real point of difference in better service, sourcing and branding.

MARKET OVERVIEW

The UK sugar market was mature and declining. It was defined by white granulated for use in a cup of tea, coffee or sprinkled over cereal; occasions when we were using less sugar because of concerns over calories. The main brands in the market had not innovated for decades or explained the difference and benefits of each sugar type (of which there are at least 10 -15 sold in every store). However, we saw two opportunities. Firstly, a new generation of home-bakers were emerging, many keen to learn and enjoy a deeply satisfying skill. The less-able home bakers needed more help and simple inspiration in the kitchen and the current brands were not providing this. As they grew in confidence, they would buy more sugar – the vital ingredient in home baking! Secondly, the moments over a hot drink sweetened by sugar are emotionally charged and our products could add a little boost of energy and a lift to those occasions – 'Do you take sugar, one spoon or two? ...' Could Whitworths tap into this emotion in some way?

There was one other barrier: the competitors decided to defend their retail distribution aggressively in order to prevent the newcomer Napier Brown establishing any brand presence in retail. The Whitworths Sugar brand had to work even harder to support the sales and marketing team to secure distribution to even begin to survive.

WHITWORTHS FOR BAKING WAS INTRODUCED WITH A SOFT LAUNCH IN APRIL 2012 AND THE EVERYDAY RANGE FOLLOWED IN 2013.



THE DESIGN BUDGET WAS APPROXIMATELY £200K INCLUDING STRATEGY, DESIGN TO ARTWORK AND PHOTOGRAPHY.

Words: 514

DESIGN SOLUTION

OVERVIEW

Looking tired and unfit for purpose, the Whitworths brand was crying out for a big hit of happiness that would engage consumers, inspire them to pick up a pack and get creative back at home. From a comforting cup of tea to a masterful Victoria Sponge, we wanted to make things simple, take the fear out of home baking and help them with good little ideas to make life easy.

At the point where strategy met design, we created a Whitworths poem that formed the basis for an inspirational brand book. This book brought our "sharing happiness" positioning to life, captured the conversational tone of voice and reflected the brand values. It played a key role internally, exciting Whitworths staff members about their workplace and was successfully used by the sales team to explain the Whitworths point of difference to new customers. In fact, it laid the foundation for all future activity.



WHITWORTHS FOR BAKING

Whitworths for Baking introduced an entirely new concept to the sugar category. Based on a nugget of insight that bakers lacking in confidence were put off by the large size of regular sugar packs, we created a range of smaller pouches with delicious recipe suggestions that would make use of the whole bag. No leftovers!

By adding an easy reseal, we helped consumers protect their sugar in storage and reduce mess in their kitchen cupboards.

On the front, our visually striking sugar icons capture the fun side of sugar; getting creative with fingers in the mixing bowl and the smell of homemade cakes. They add interest on shelf and encourage interaction. Confident colour coding across the range points out the different types of sugar and brightens up the fixture. Further touches include a playful wooden spoon shaped window and flavour notes, giving consumers a taste for the sugar in the bag.



Whitworths Poem

WHITWORTHS EVERYDAY

Our everyday Whitworths sugar range is built on the values of sharing, inspiration and happiness to introduce much-needed personality to the sugar fixture. Maintaining traditional packaging formats, we used all six sides of each bag to have a one-on-one conversation with our consumers, inviting them in through simple, two-dimensional illustration. This hand-crafted approach continued around every pack in a "happiness saying", a helpful sugar tip ("have you tried?") and an unbelievable but true sugar fact ("did you know!"), painting an image in consumers' minds that this is more than a mere commodity product. Colour coding directly related to the Whitworths for Baking range, creating a very positive Whitworths presence in store that was difficult to miss.



FANCY A BICKIE?



FINAL THOUGHT

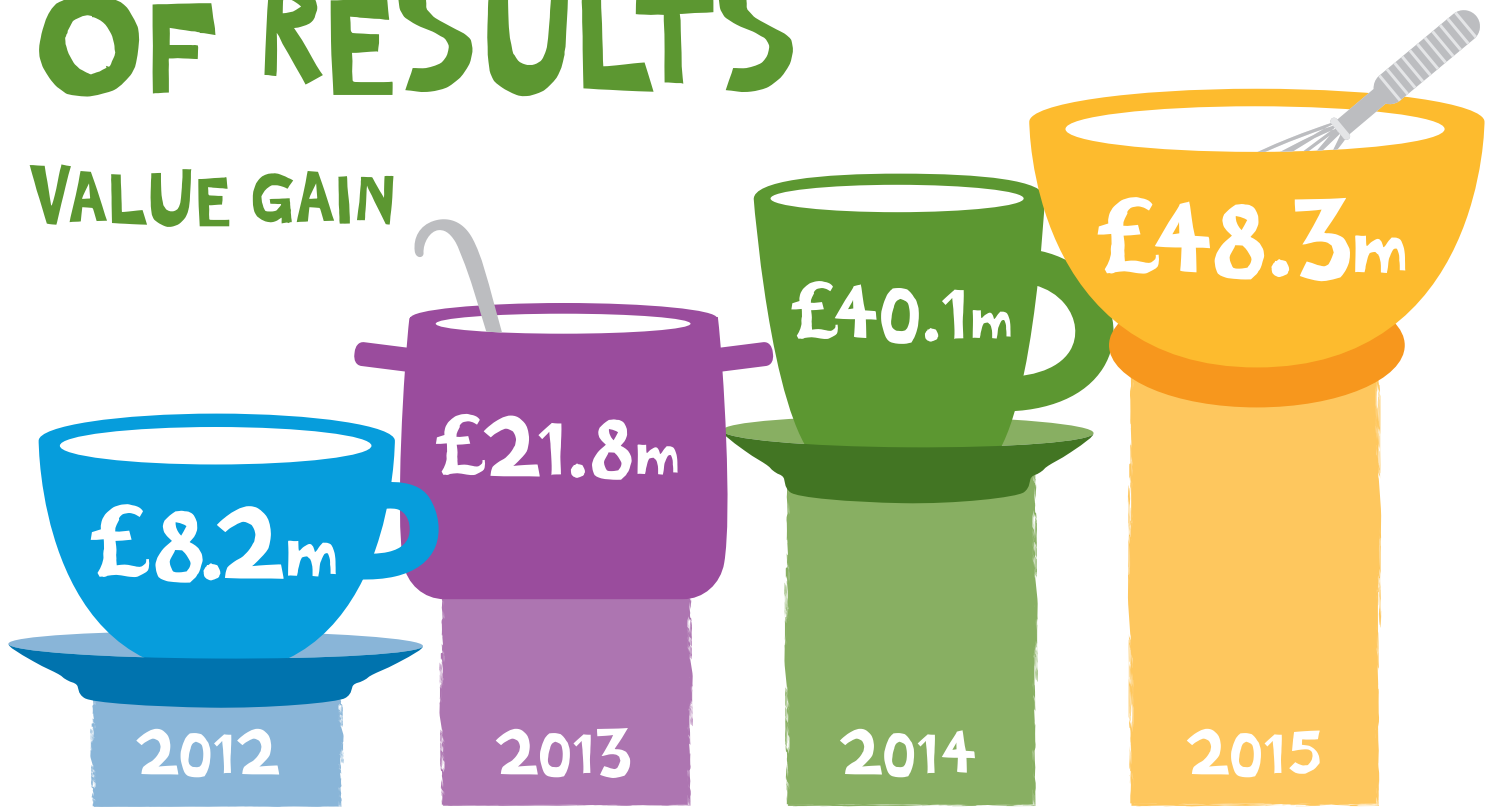
The extremely effective graphic structure of each range has been effectively rolled across subsequent range extensions, onto innovative pack structures such as Twist and Sprinkle and even in to food service with great success. This simple approach is what resonates with retailers and consumers alike and has helped Whitworths gain its huge increases in distribution and market share since relaunch.

Words: 487



SUMMARY OF RESULTS

VALUE GAIN



SINCE THE REBRAND, SALES HAVE INCREASED FROM £8.2 MILLION IN 2012 TO £48.3 MILLION IN 2015 IN A DECLINING CATEGORY.

Source: Kantar Worldpanel 52 w/e March

VOLUME GAIN VERSUS TARGET

By 2015, ex factory volumes have almost reached target (10% below), two years ahead of schedule and have grown by 157%.

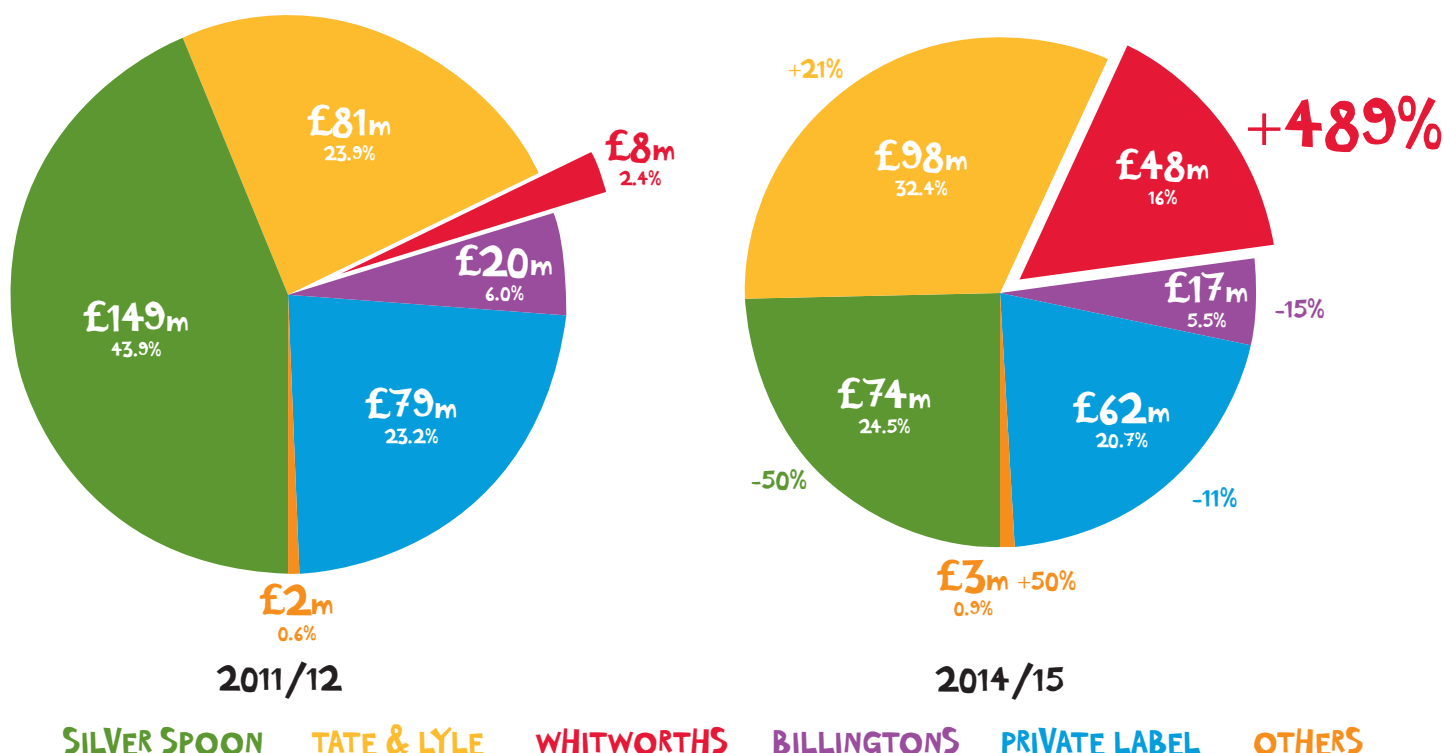
Whitworths sales volume grew by 93% and accounts for almost 75% of all Napier Brown's retail sugar sales.

INCREASED DISTRIBUTION

Distribution of the Whitworths brand has increased dramatically in recent years from a small selection of discount retailers in 2012 to a presence in three of the "big four" supermarkets in 2015. The great news is that not only did distribution increase, but the breadth of products listed by these retailers also increased.

INCREASED SLICE OF THE PIE

Whitworths has been the UK's fastest growing sugar brand for the past three years. Between the year ending 30 March 2012 and 29 March 2015, Whitworths' value sales increased by 489% in a market that had declined 11% in the same period. Whitworths also gained 13.6% more market share points, from 2.4% to 16% share.

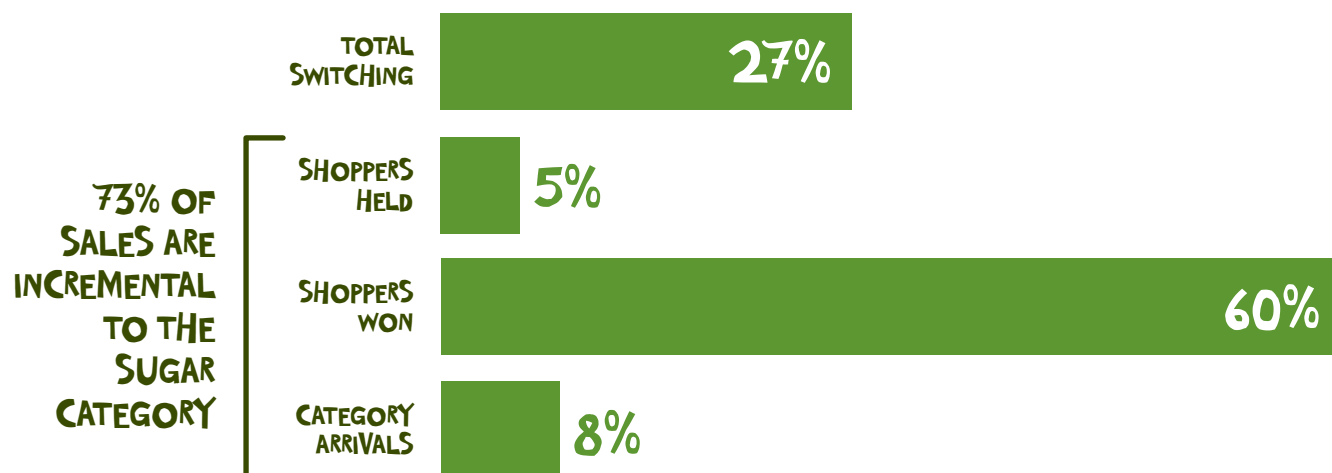


Source: Kantar Worldpanel March.

CHANGES IN SPENDING PATTERNS

Whitworths for Baking continues to grow incremental sales for the sugar category, particularly through shoppers adding the brand to their repertoire.

WHITWORTHS FOR BAKING - GAINS/LOSS ANALYSIS



Source: Kantar Worldpanel 52 w/e 25th May 2014.

HAPPIER STAFF

HEAD COUNT INCREASED BY

80



- ★ In Summer 2011, the Retail Commercial Team consisted of a lone National Account Manager. Owing to the success of the Whitworths brand, she's now been joined by a Marketing Manager, Marketing Assistant, Category Manager and National Account Executive with plans to take on more people in the near future. Happy team!
- ★ To meet the increase in demand, Napier Brown invested £3.5m in the construction of a new 'Sugar Hub' in Stallingborough that enables the processing, storage and efficient onward distribution of sugar imported from all over the world. This became fully operational in 2014.



WORTH PAYING MORE FOR



**WHITWORTHS FOR
BAKING RANGE
ACHIEVES AN AVERAGE
73% PREMIUM PER KG
OVER EVERYDAY
PACKET SUGAR.**

SALE TO TEREOS

“TEREOS BOUGHT NAPIER BROWN BECAUSE OF IT'S UK STRENGTH IN BOTH B2B INDUSTRIAL SALES AND THE STRONG PRESENCE IN THE RETAIL MARKET. UNDOUBTEDLY, NAPIER BROWN IS PERCEIVED AS A PROACTIVE AND INNOVATIVE SUPPLIER, DRIVEN BY THE WHITWORTH'S BRAND AND RANGE REDESIGN.”

Quote: Louise Attack, Commercial Director Napier Brown



RESEARCH DEBRIEF

BEFORE THE REBRAND...

"Whitworths packaging looks cheap, functional and uninvolving... Often felt to have the lowest profile and distribution of all the brands."

Source: Axis Consulting 2009 Qual. Research



AFTER THE REBRAND...

WHITWORTHS FOR BAKING

"The brand presentation researched was very positively received; key reasons for appeal being: the concept itself (a colour-coded range of different sugars for baking), the pouch format (perceived as neat, re-sealable, & easy to pour from), the pack colours, graphics and visuals (eye-catching, modern, classy)."

Source: Axis Consulting 2011 Pre-launch Qual. Research



WHITWORTHS EVERYDAY RANGE

"More modern"
"More forward-looking; even 'trend-setting'"
"More attractive, impactful and attention grabbing"
"More lively and dynamic"
"More emotive and fun; richer imagery and associations; more of a relationship with the consumer"

Source: Axis Consulting 2011 Post-launch Qual. Research



OTHER INFLUENCING FACTORS

Home baking penetration and frequency has grown markedly, lifting us for a time from the gloom of the recession and driven by plenty of TV exposure, the Great British Bake Off leading the way with 6 million of us watching at its peak. In 2011 this influenced the brief, positioning and design execution. While Whitworths sales benefitted especially on brown and icing sugars, we should put the trend into context. Home baking still only accounts for a small proportion of sugar consumption, the majority is in hot drinks. Sugar consumption continues to steadily decline.

Whitworths deployed carefully targeted support (Point of Sale and press ads) in or close to the new stores and during the peak home baking seasons.

The impact of the Whitworths packaging in-store should not be underestimated. The sugar brands (including Tate & Lyle, Silver Spoon and Billingtons) spent on average a total of £2.1m per annum on advertising between them from 2012 to 2014, a total of £6.34m during this period. Whitworths share of this expenditure is recorded at just 2% by Nielsen Ad Dynamix for the years to December 31st.

"BRANDPOINT HAVE BEEN AN INTEGRAL PART OF OUR MARKETING TEAM, NOT JUST PRODUCING GREAT DESIGNS BUT WORKING WITH US ON DEVELOPING THE BRAND VISION...THEY HAVE BEEN A BRAND PARTNER MORE THAN JUST A DESIGN AGENCY."

Andrew Brown, Group Brand & Marketing Director
Real Good Food plc