

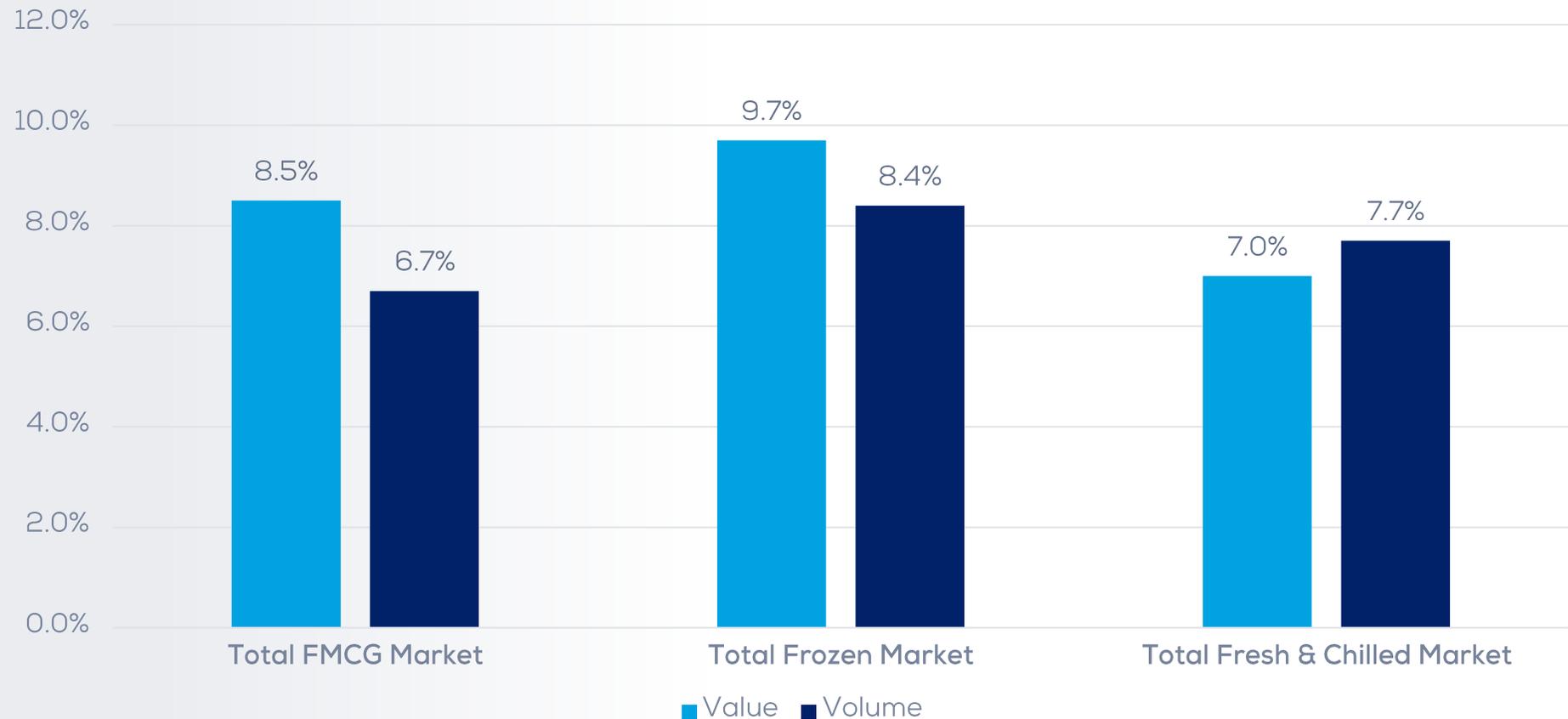
Kantar Data 6th September 2020



KANTAR



Total Market Growth (YOY)



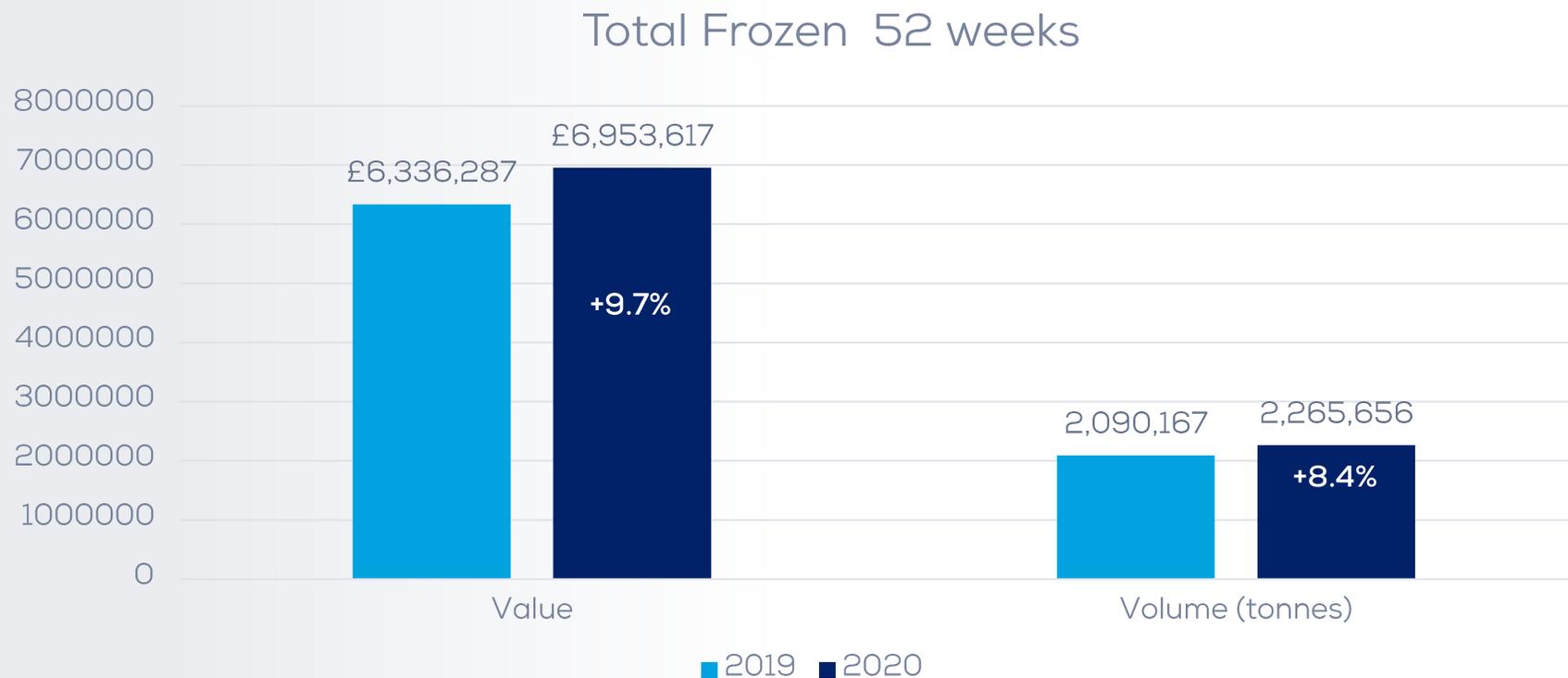
Kantar Data 52 week data – 6th September 2020



Total Market

- ▶ The overall grocery market has grown 8.5% in value and 6.7% in volume over the 52 week period.
- ▶ Frozen has out performed total grocery growth in both value +9.7% and volume +8.4%.
- ▶ Over the 52 week period the frozen category has added £617m in sales value and 175 tonnes in volume.
- ▶ The frozen category has also out performed the Fresh and Chilled category in percentage growth terms.

Frozen Category

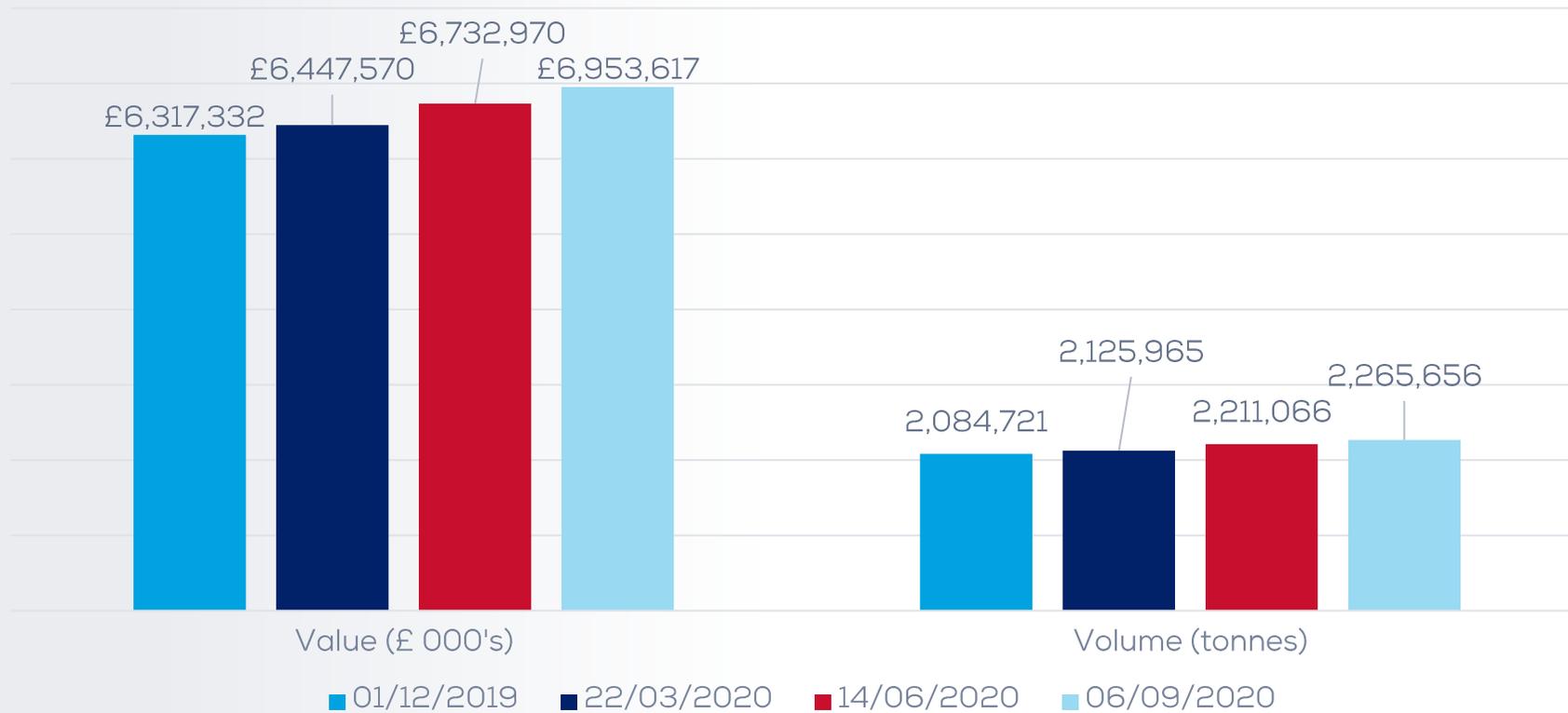


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Frozen Category

Total Frozen 52 weeks

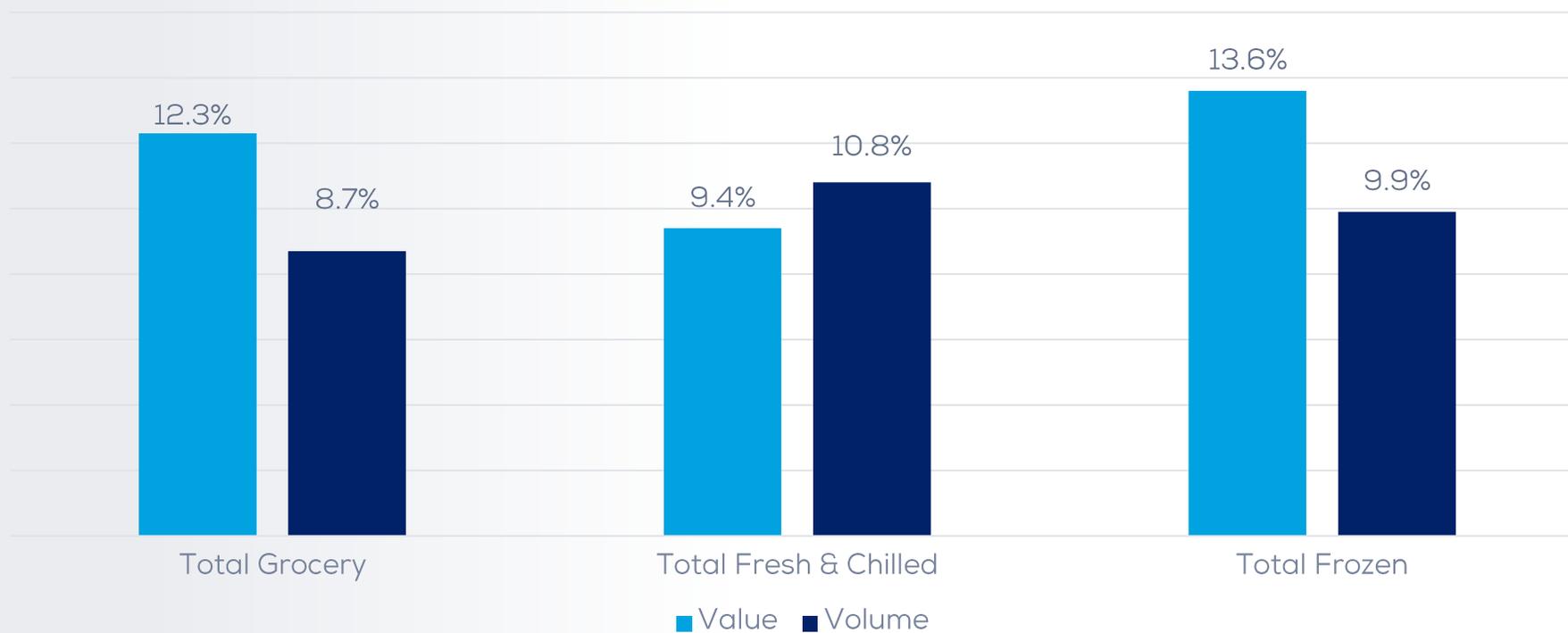


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Total Market

Total Market 12 week data

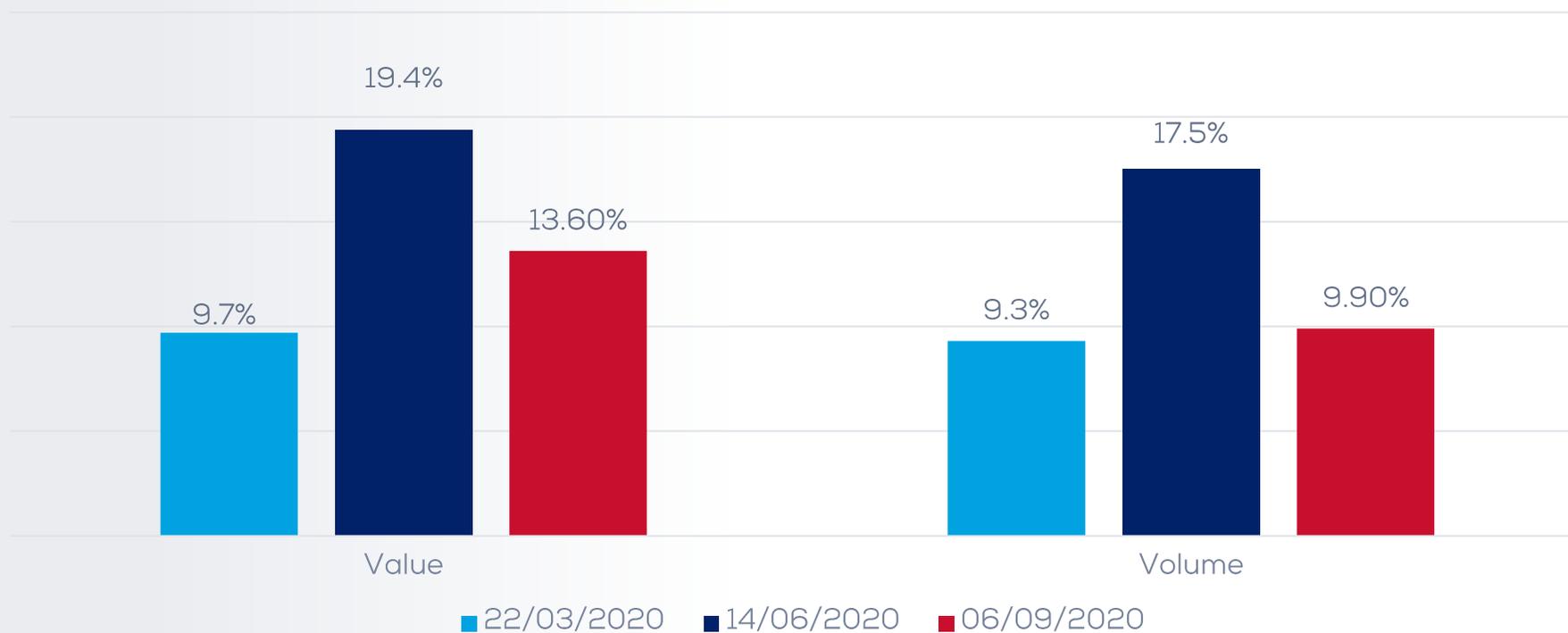


Kantar Data 12 week data – 6th September 2020



Total Market

Total Frozen 12 week data



Kantar Data 12 week data – 6th September 2020

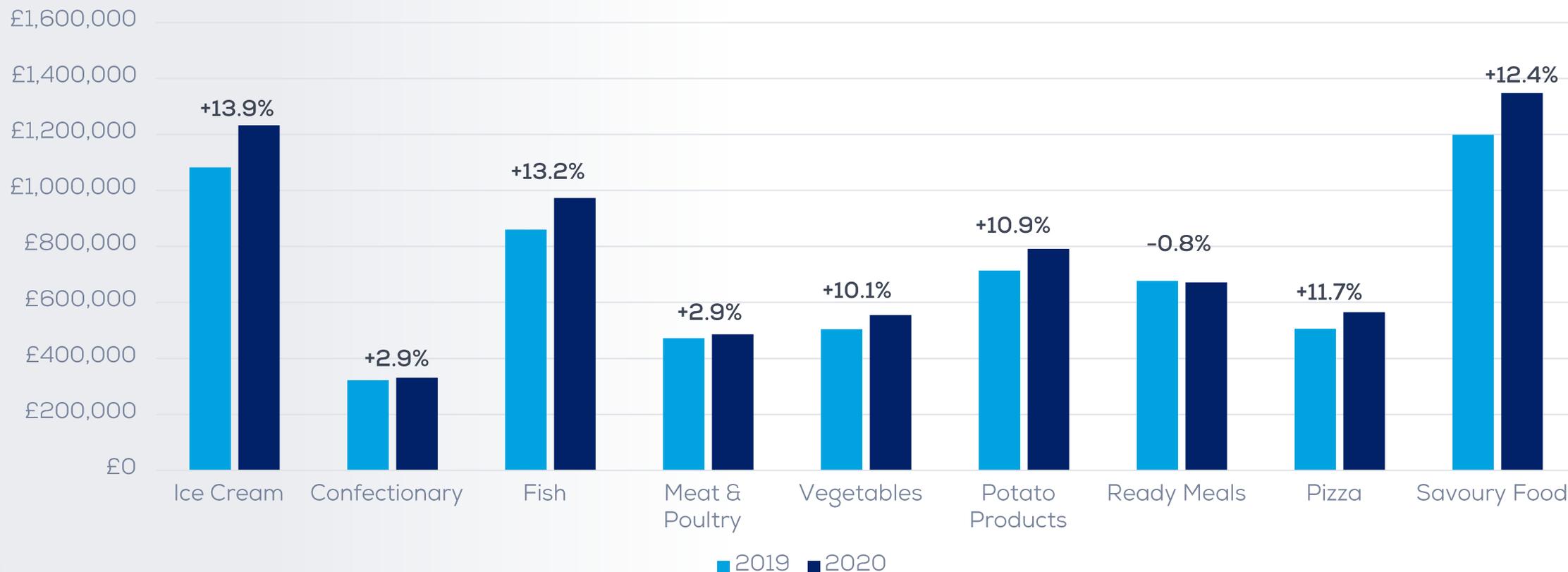


Frozen Category

- ▶ The performance of the Frozen category remains very positive and has seen continued growth ahead of total grocery.
- ▶ On the 3 sets of 12 week data supplied by Kantar Frozen value performance has been above both grocery and fresh & chilled in percentage terms across the three data sets.
- ▶ We have seen a slight decline in the sales growth both value and volume from that recorded in June of +19.4%.

Frozen Categories

Value (£'000)

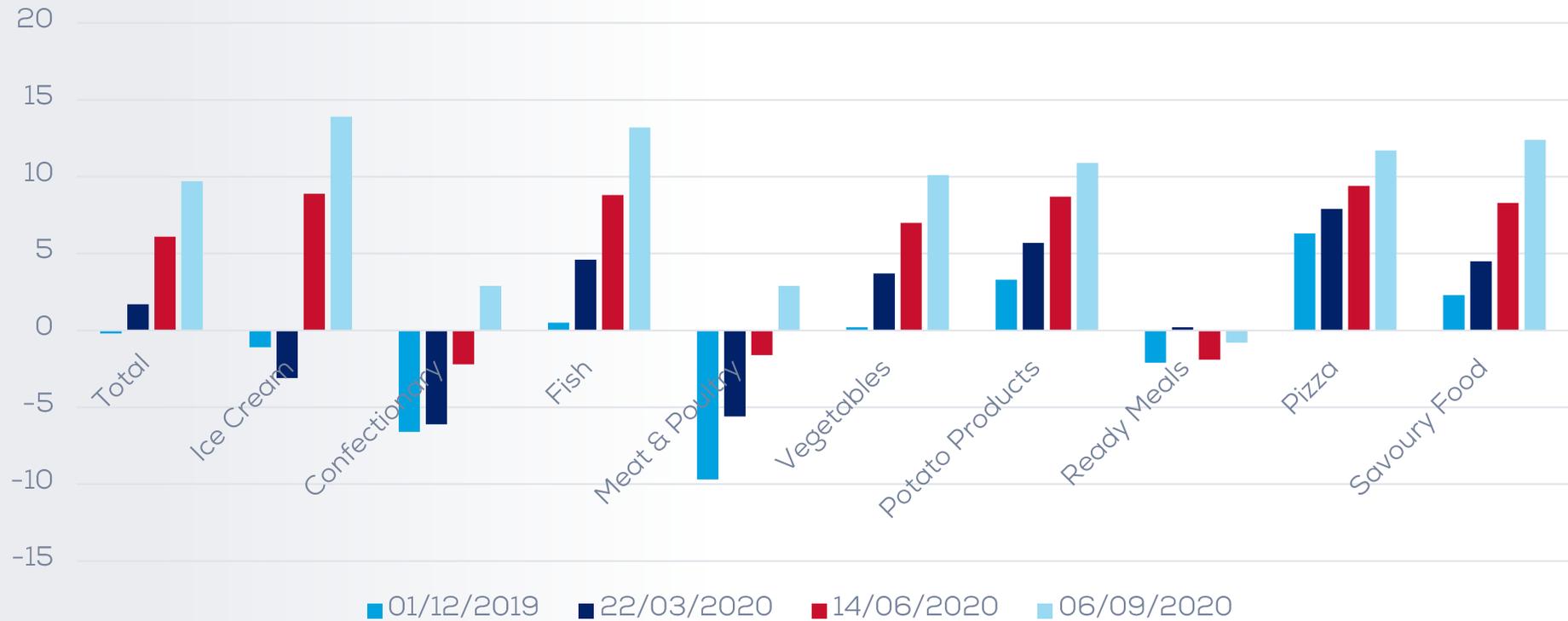


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Frozen Categories

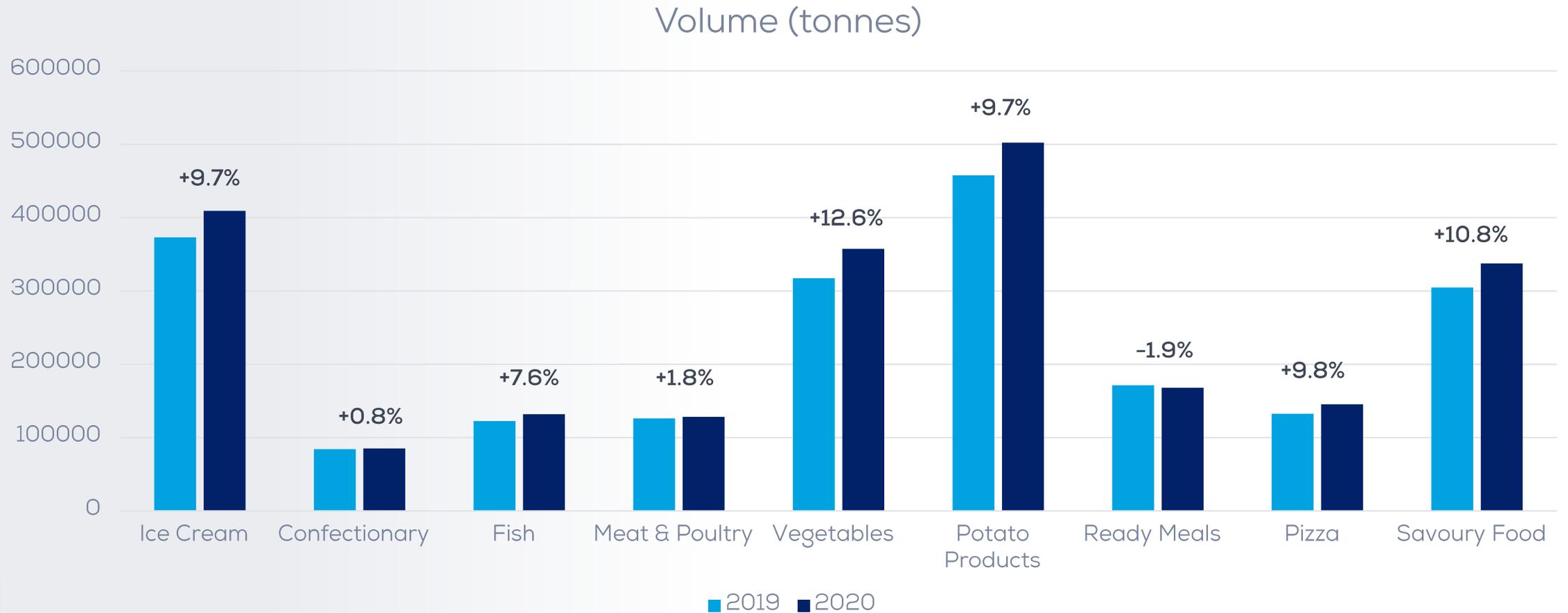
Value Growth Rates 52 weeks data



Kantar Data 52 week data - 6th September 2020



Frozen Categories

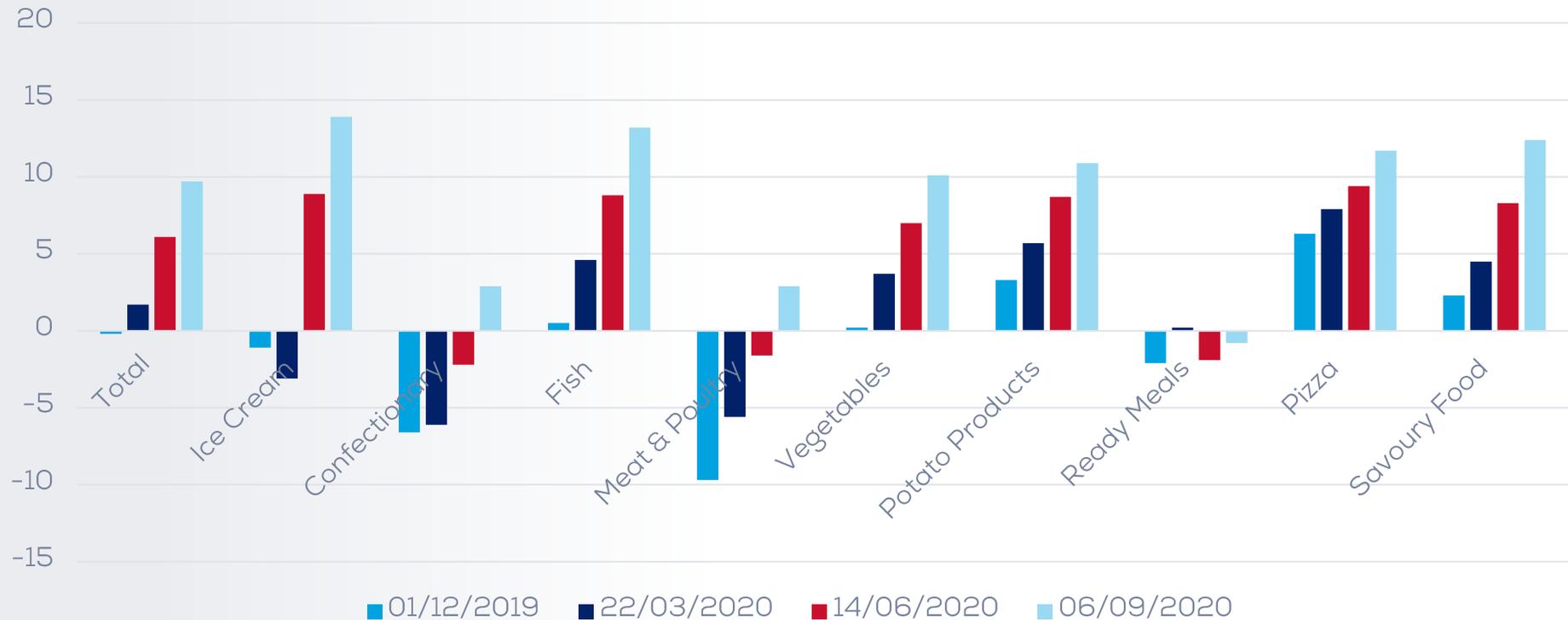


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Frozen Categories

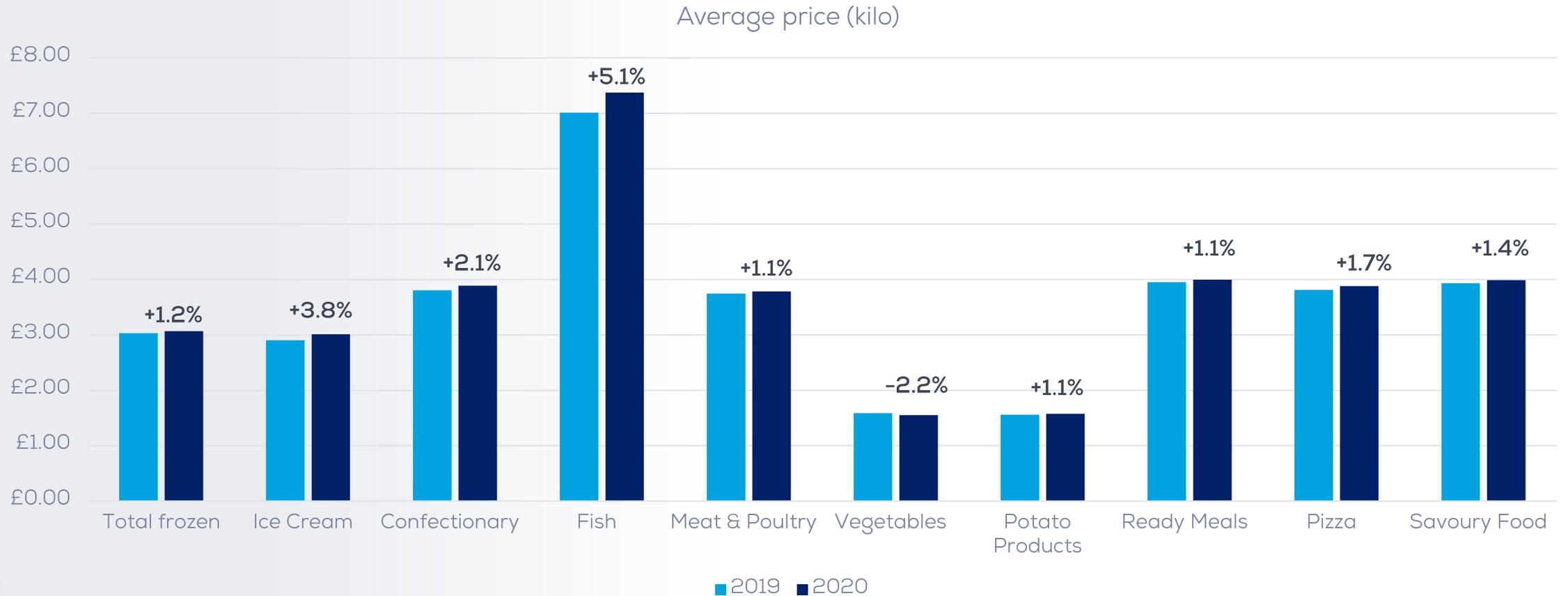
Volume Growth Rates 52 weeks data



Kantar Data 52 week data - 6th September 2020



Frozen Categories



Kantar Data 52 week data – 6th September 2020



Frozen Categories

Category	Share of the Value growth	Share of Volume Growth
Ice Cream	24.3%	20.7%
Savoury	24.1%	18.8%
Fish	18.3%	5.33%
Potato products	12.6%	25.3%
Pizza	9.6%	7.4%
Vegetables	8.2%	22.8%
Meat & Poultry	2.2%	1.3%
Confectionary	1.5%	0.36%

Kantar Data 52 week data – 6th September 2020



Frozen Categories

- ▶ Of the 9 categories reported by Kantar 8 are in value growth, with 6 in double digit value growth.
- ▶ It is a similar picture in volume with 8 categories in growth, although here only 2 are in double digit growth.
- ▶ Average price has increased by 1.2% Vs. +1.7% for total grocery and -0.6% for Fresh & Chilled.
- ▶ The average price per kilo in the June data was £3.026 Vs. £3.069 now +1.4%.

Frozen Category

- ▶ Whilst we have seen very strong growth in retail the Out of Home sector has been impacted in a very negative way.
- ▶ Peter Backman has estimated that annual sales for frozen in Out of Home in the last year stands at £1.6bn down from £2.4bn in 2019.
- ▶ The Out of Home has seen declines in most sectors but QSR and Pubs have been impacted the most.
- ▶ This means the combined value of retail and Out of Home has seen a decline of £200m a decline of 2.3%.

Frozen Sales value
September 2020

