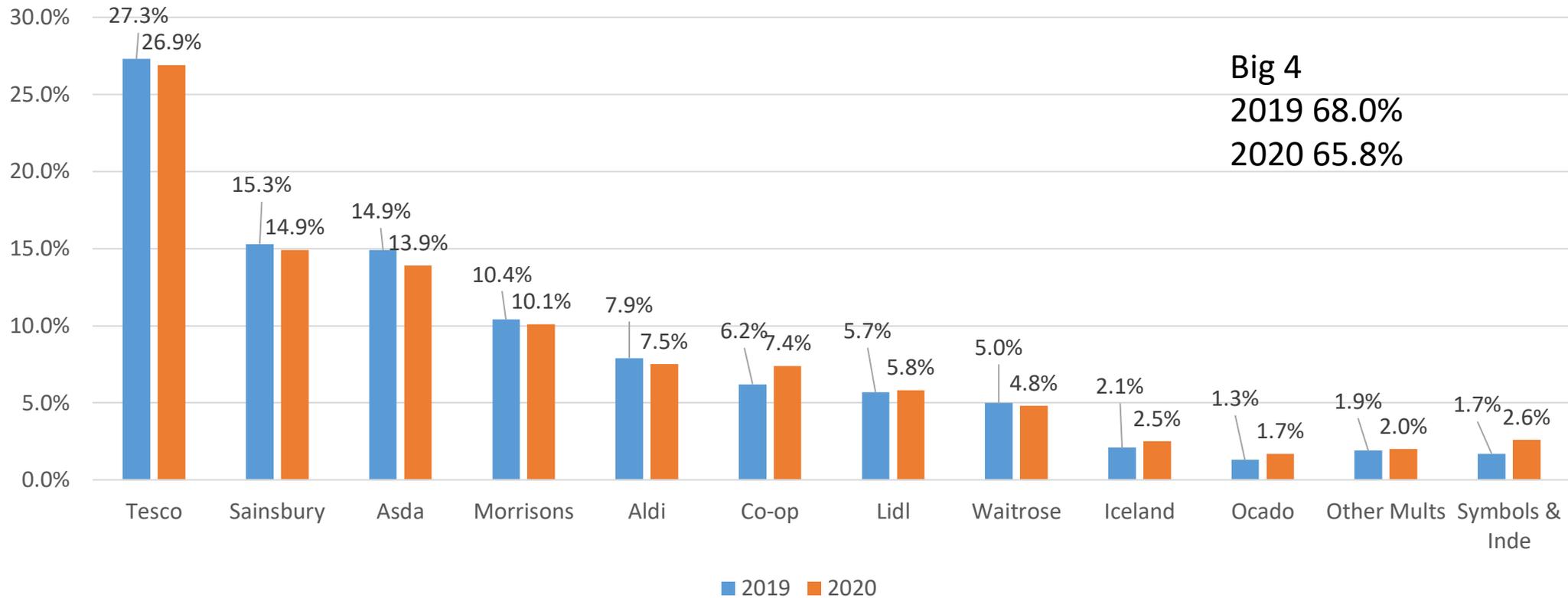




Kantar Data 14 June 2020

Retailer Shares

Grocery Share 12 weeks

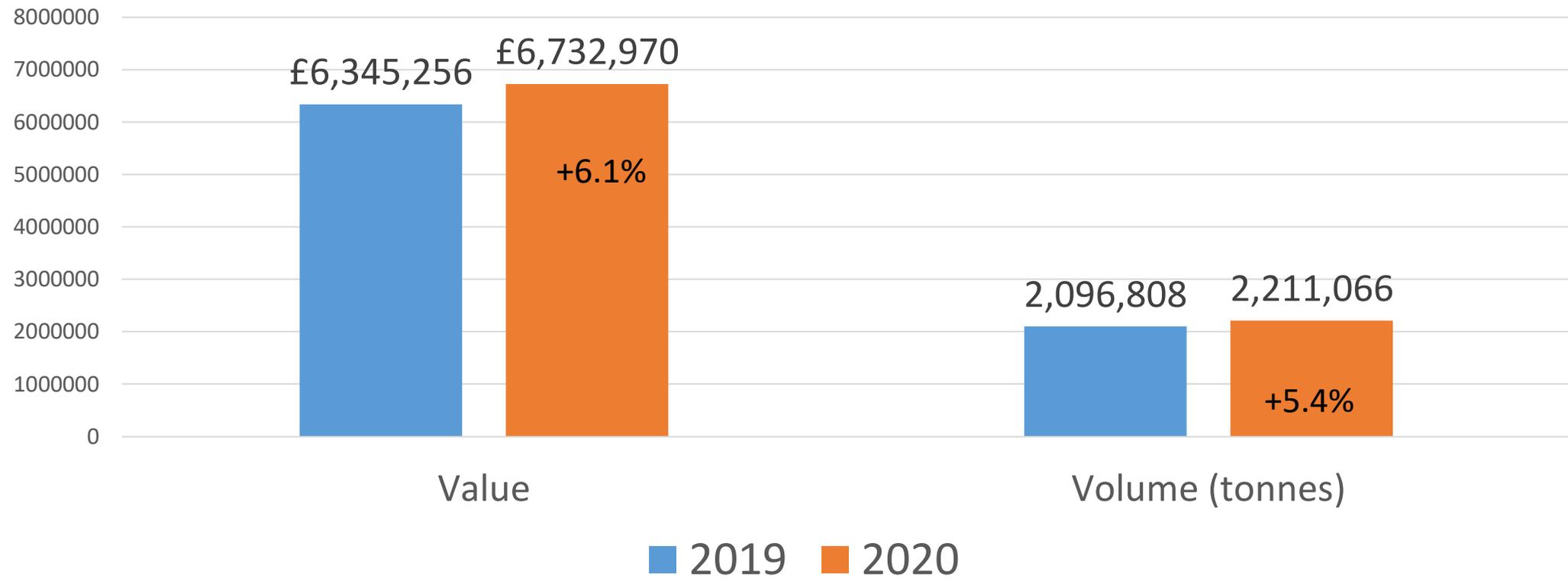


Grocery Market

- The 12-week data showed a market growth rate of +13.7% in value.
- Despite this the Big 4 still showed a loss of share down by -2.2%
- The combined share of Aldi & Lidl dropped to 13.3% down 0.3% yr. on yr. driven mainly by a 0.2% share decline for Aldi.
- Other Multiples / Symbols & Independents all saw massive growth 19.8% / 69.3%
- Ocado grew by +42 but possible capacity issues restricted their growth

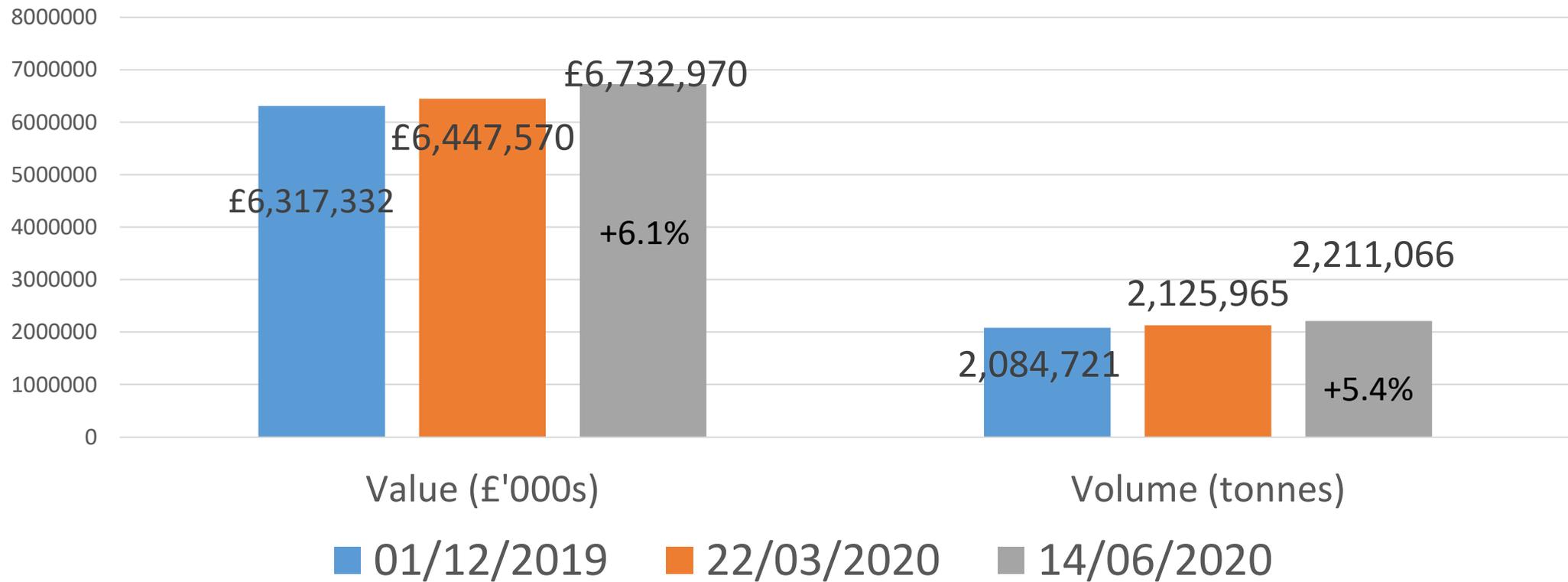
Frozen Market

Total Frozen 52 weeks



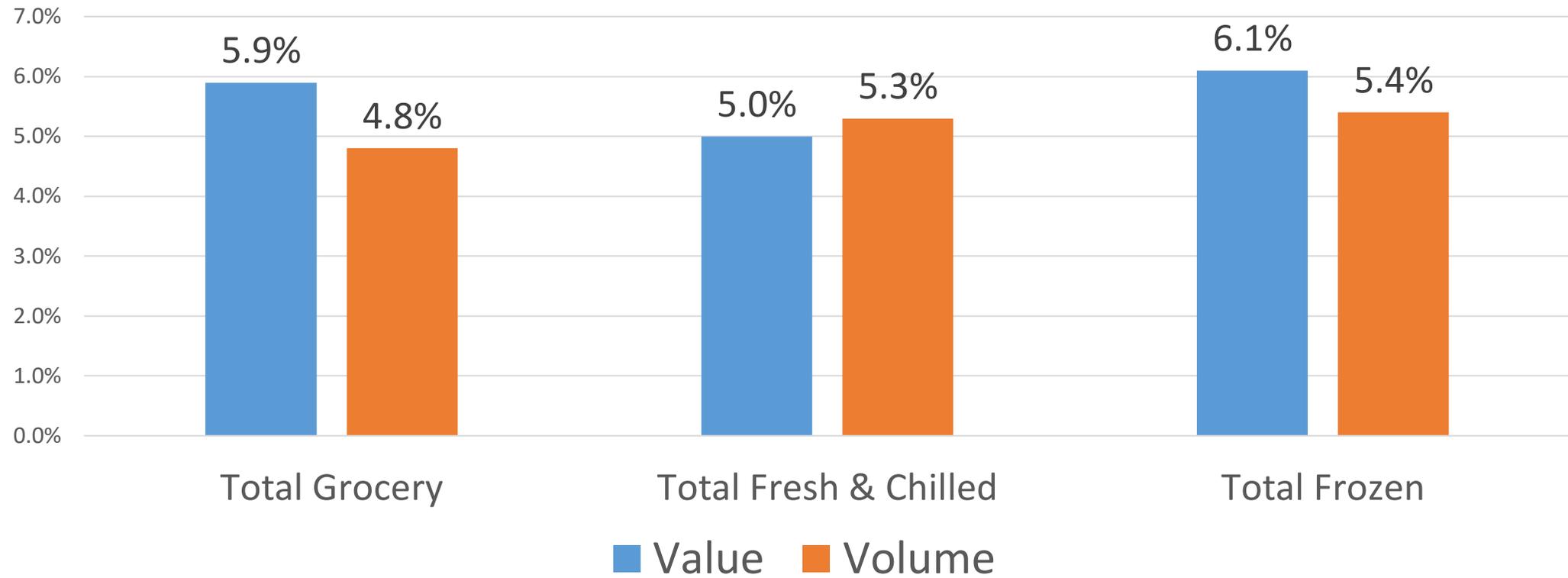
Frozen Market

Total Frozen 52 weeks



Total Market

Total Market Growth 52 weeks

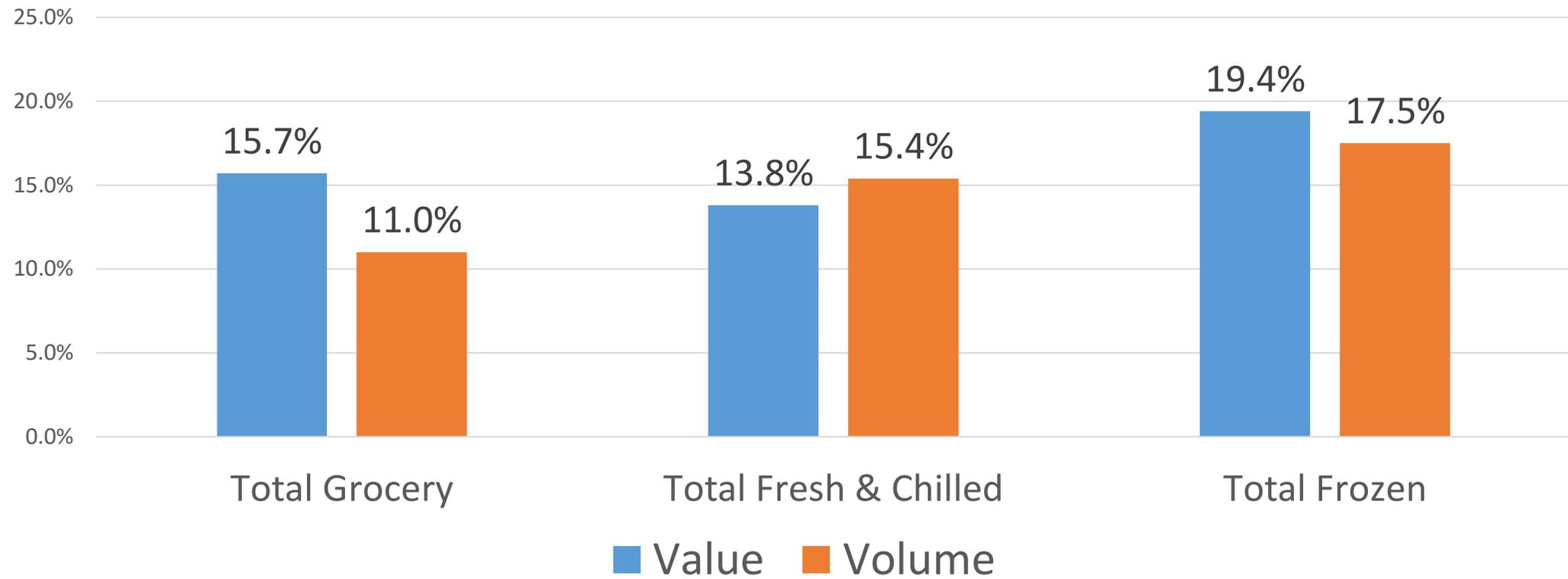


Frozen Market

- Year on year the frozen category added £387m growing at 6.1%
- Volume growth was 114k tonnes at 5.4%
- Average price increased by +0.6%
- Vs data 1/12/19 the total value of the frozen category has increased by £416m or 6.6%

Total Market

Total Market Growth 12 weeks

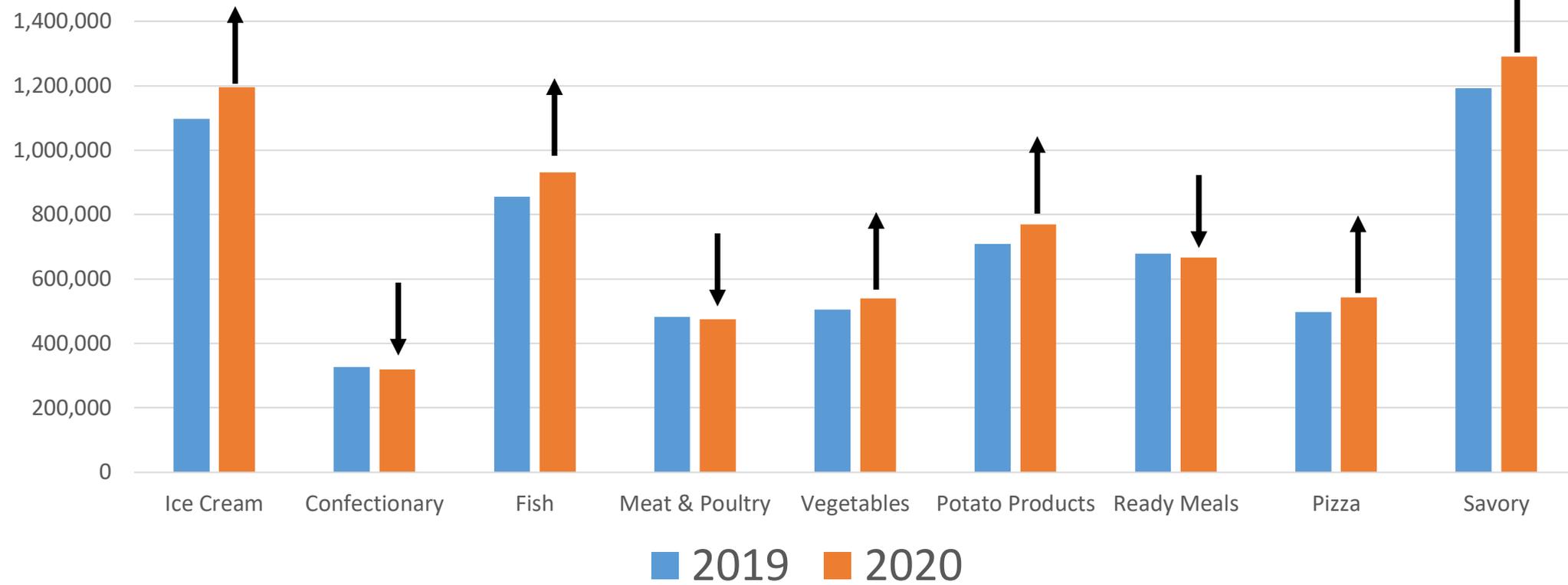


Frozen Market

- The 12-week data shows a year on year vale growth of just over £285m
- Frozen is out-performing Total Grocery and Fresh & Chilled in both value and volume.
- Average price per kilo has increased by 1.62% which is behind total grocery at +4.27%

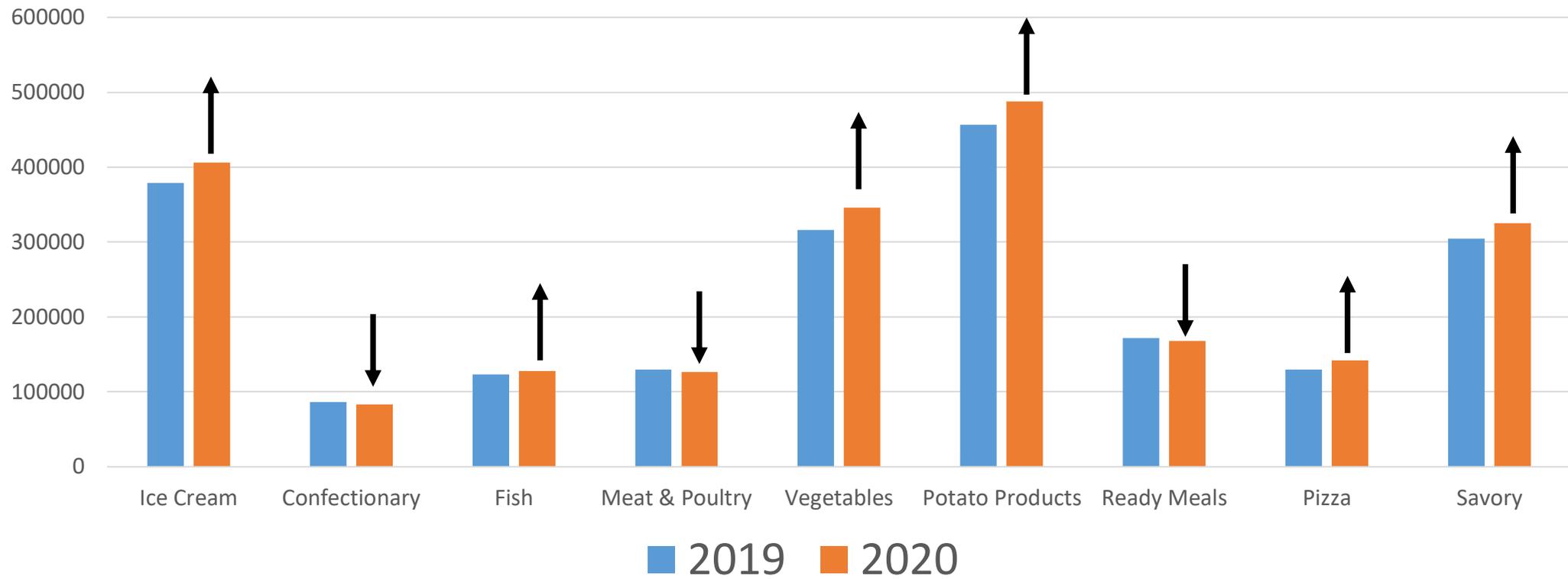
Frozen Categories

Value 52 weeks (£'000s)



Frozen Categories

Volume 52 weeks (tonnes)



Frozen Categories

➤ Categories driving the growth are

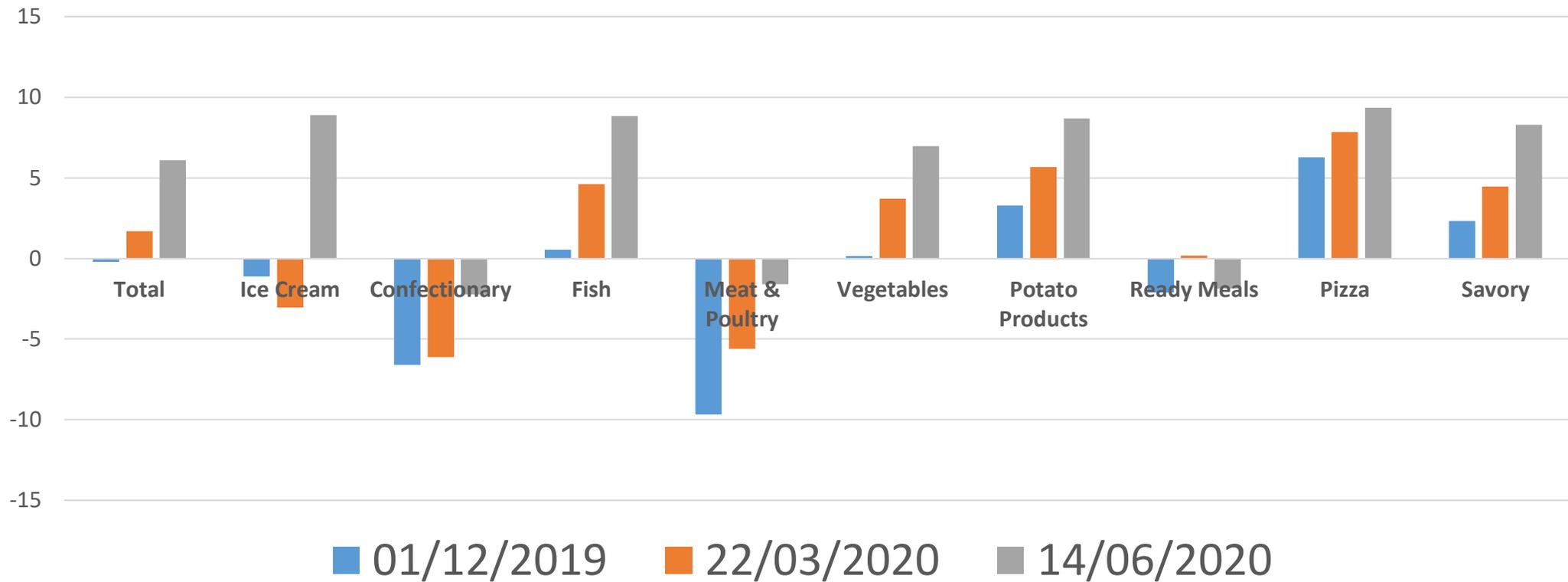
Category	Share of the Value growth	Share of Volume Growth
Savory	25.6%	18.0%
Ice Cream	25.2%	23.8%
Fish	19.5%	4.3%
Potato products	15.9%	27.1%
Pizza	12.0%	10.8%
Vegetables	9.1%	25.9%

Frozen Categories

- Over the 52-week period we have 3 categories that are showing a decline.
- However if we look at the last 3 periods data the rate of decline is slowing which would indicate growth in the short term.
- Ave RSP per Kilo has increased by 0.6% across all frozen.
- Fish is showing the largest price increase of 4.6% per Kilo.
- Pizza and Vegetables have seen a decline in average -0.2% and -2.2% respectively.

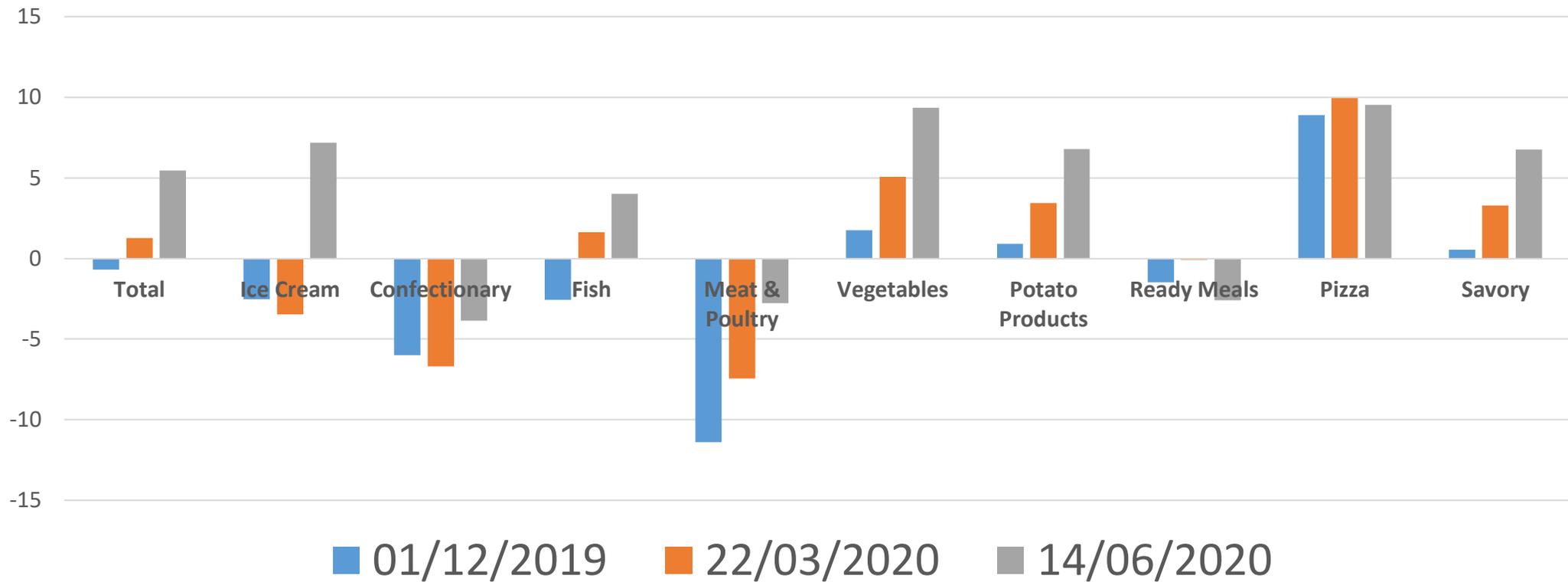
Frozen Categories

Value Growth Rates 52 week



Frozen Categories

Volume Growth Rates 52 week



Frozen Categories

Average Price Increase Per Kilo

