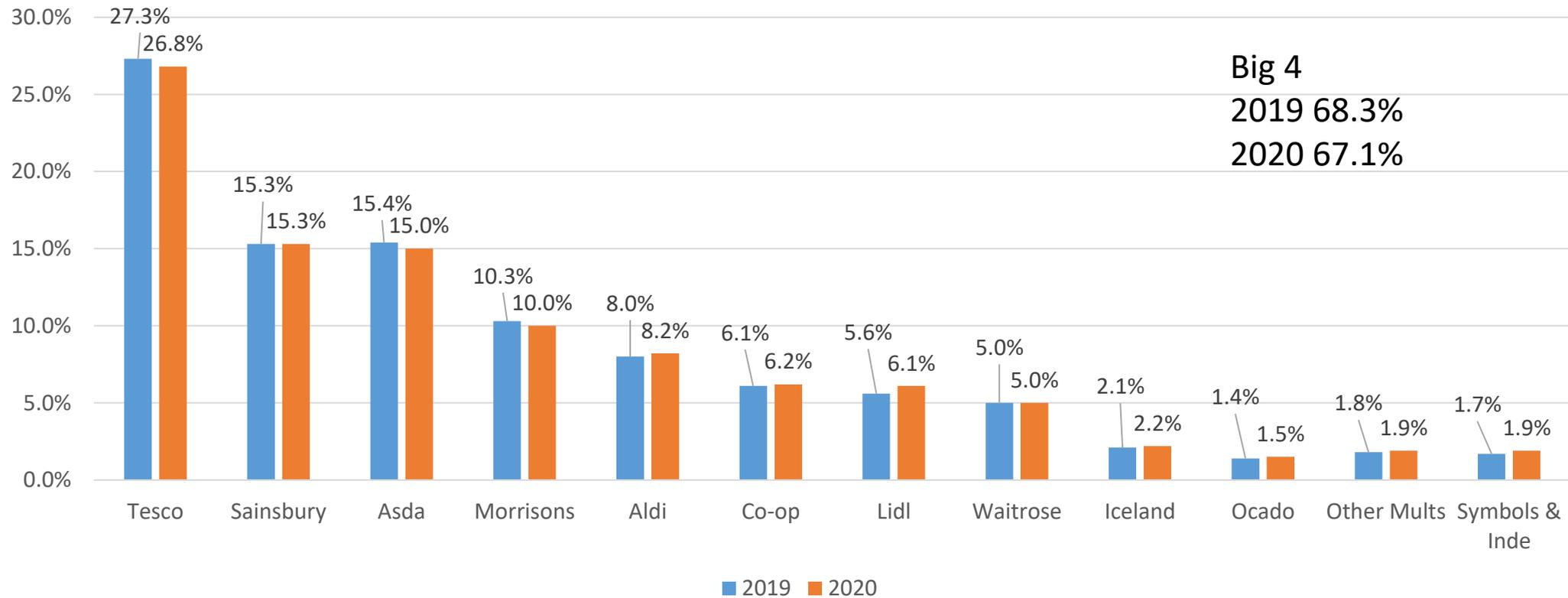




Kantar Data 22 March 2020

Retailer Shares

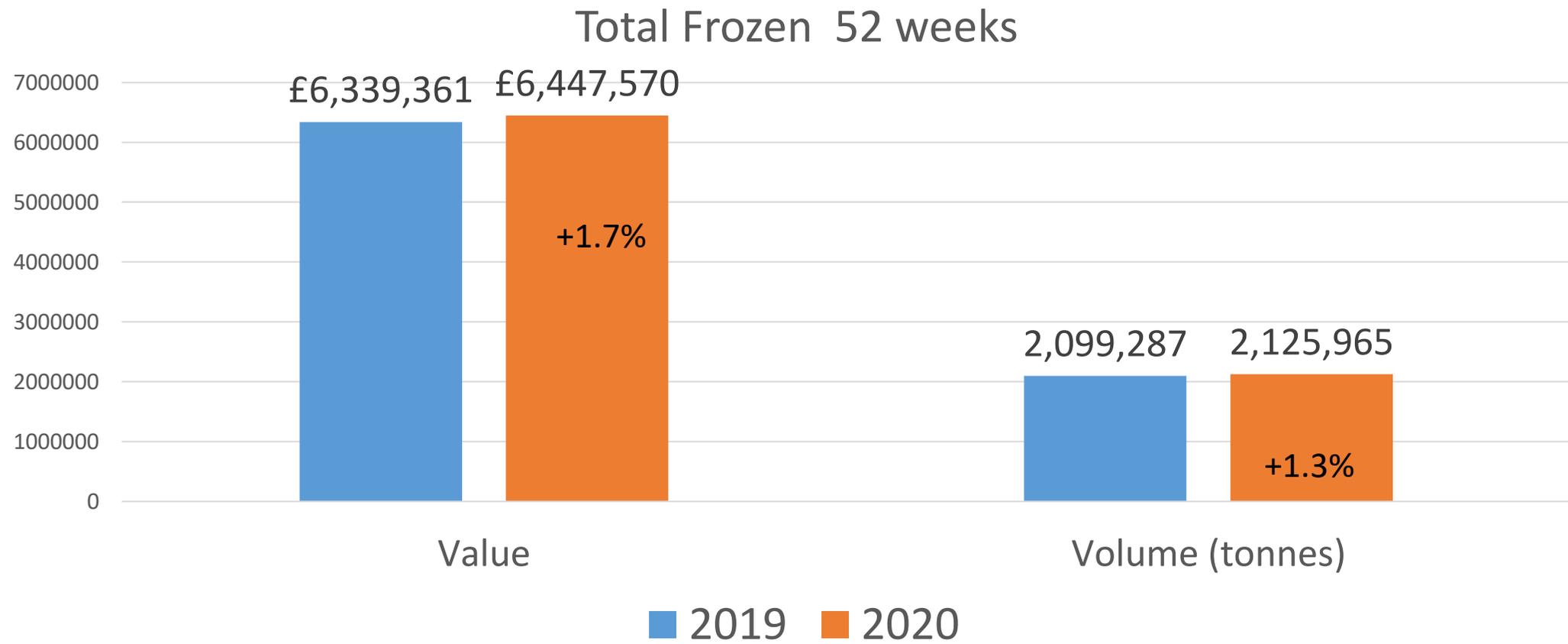
Grocery Share



Grocery Market

- The 12-week data showed a market growth rate of +7.6% in value.
- Despite this the Big 4 still showed a loss of share down by -1.2%
- Lidl saw the largest growth rate at +17.6%
- Other Multiples / Symbols & Independents all saw massive growth 13.7% / 16.1%
- Ocado grew by +12.5 but possible capacity issues restricted their growth

Frozen Market

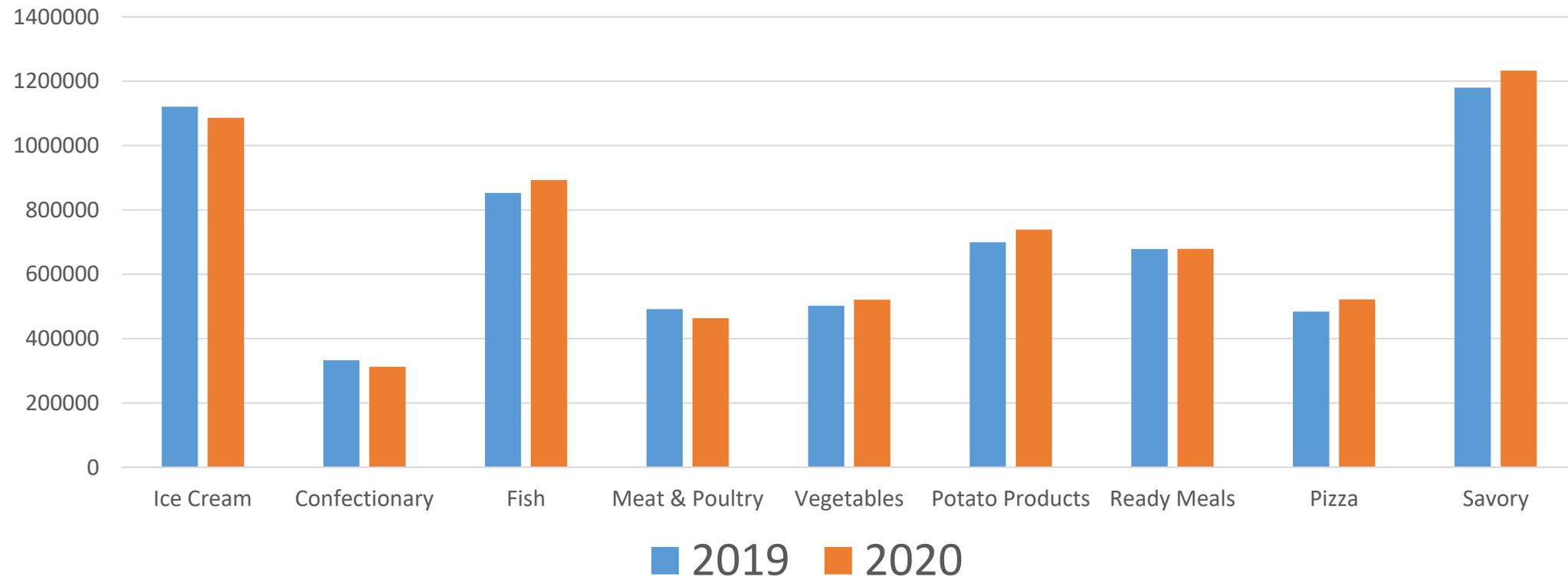


Frozen Market

- In the 12-week data frozen grew by 9.7% which was ahead of the Total Grocery market which grew at 7.6%.
- Kantar also noted that in the 4-week period Grocery grew at +20.6% vs frozen at 28.1%.
- So early indications from the data indicate that frozen is growing ahead of the total market.
- Contacts with retailers also show growth remaining anywhere between 25 to 30%

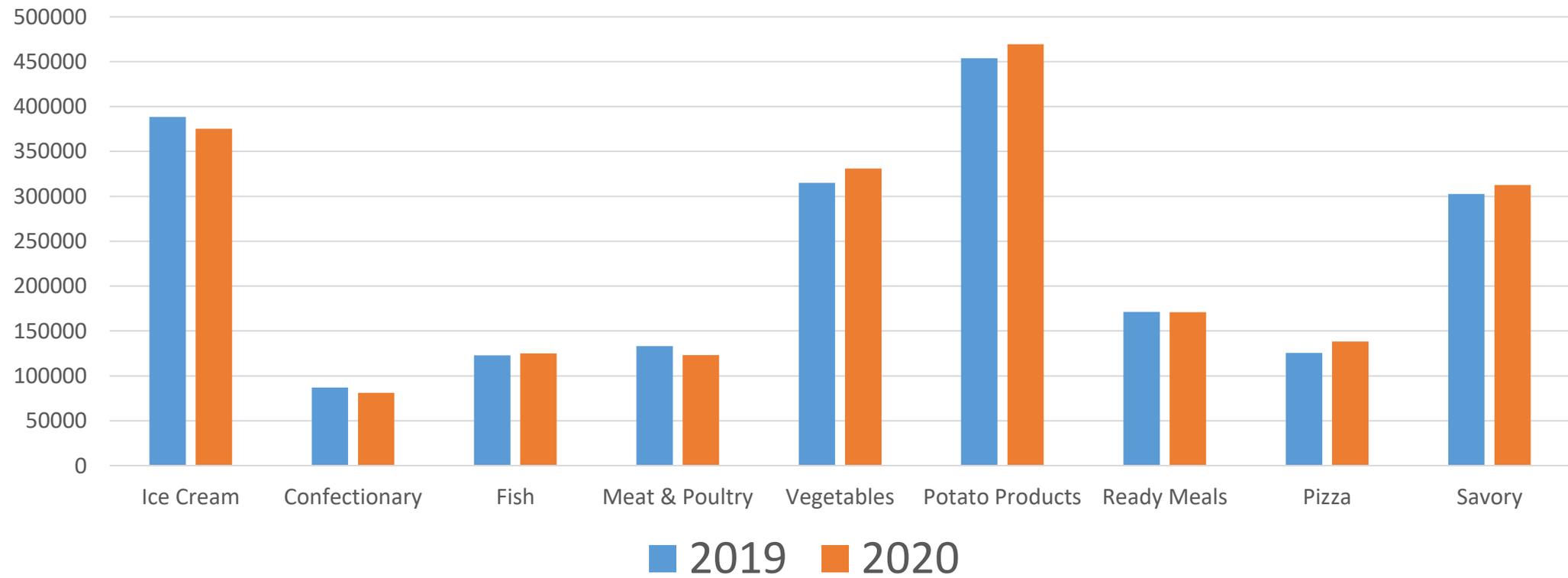
Frozen Categories

Value 52 weeks



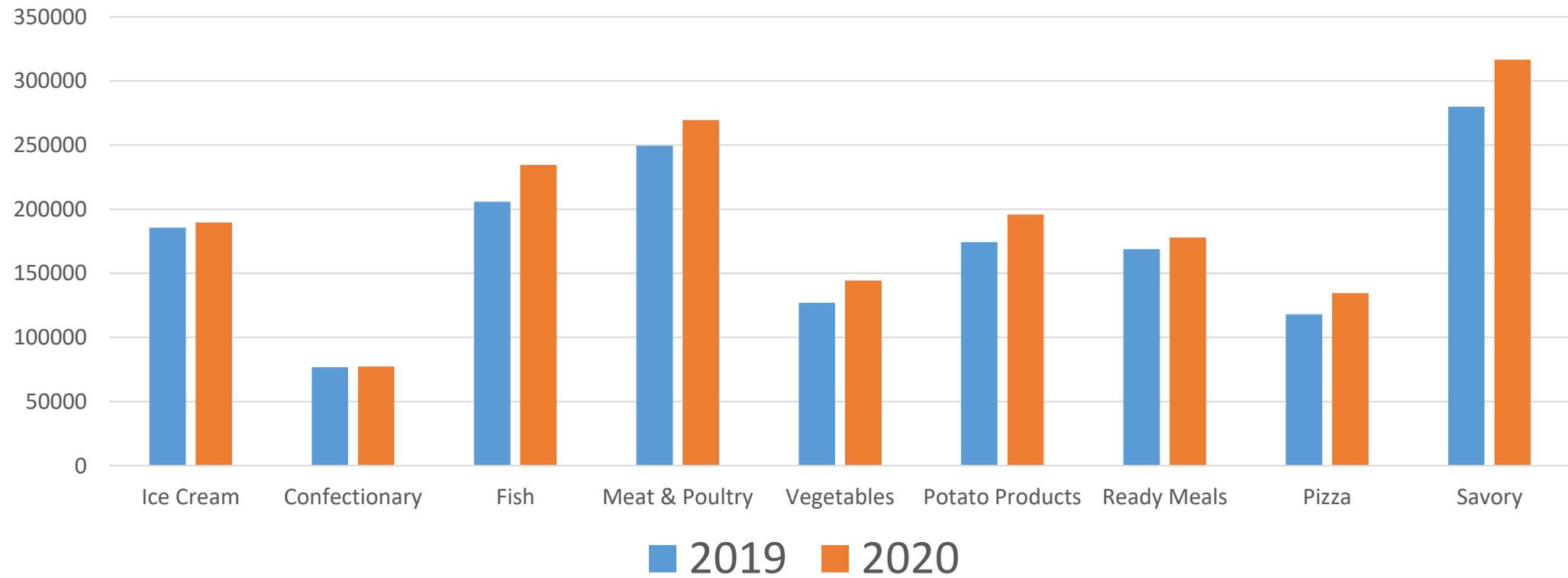
Frozen Categories

Volume 52 weeks



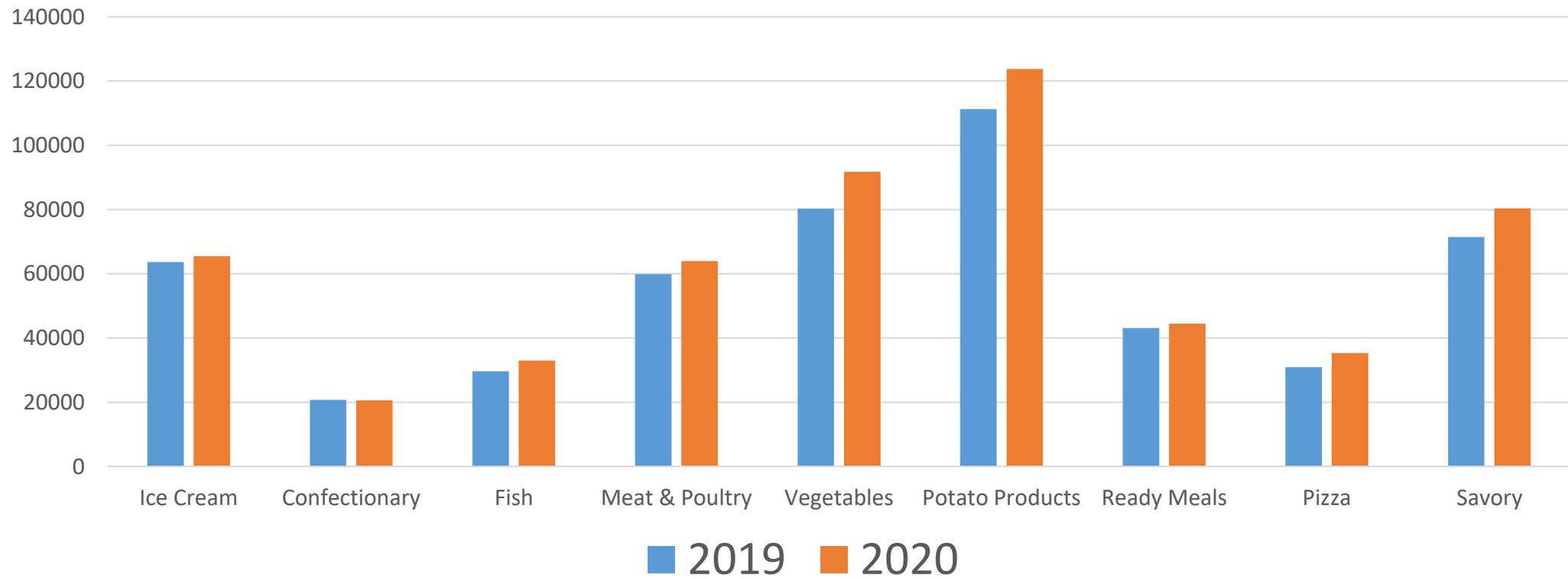
Frozen Categories

Value 12 weeks



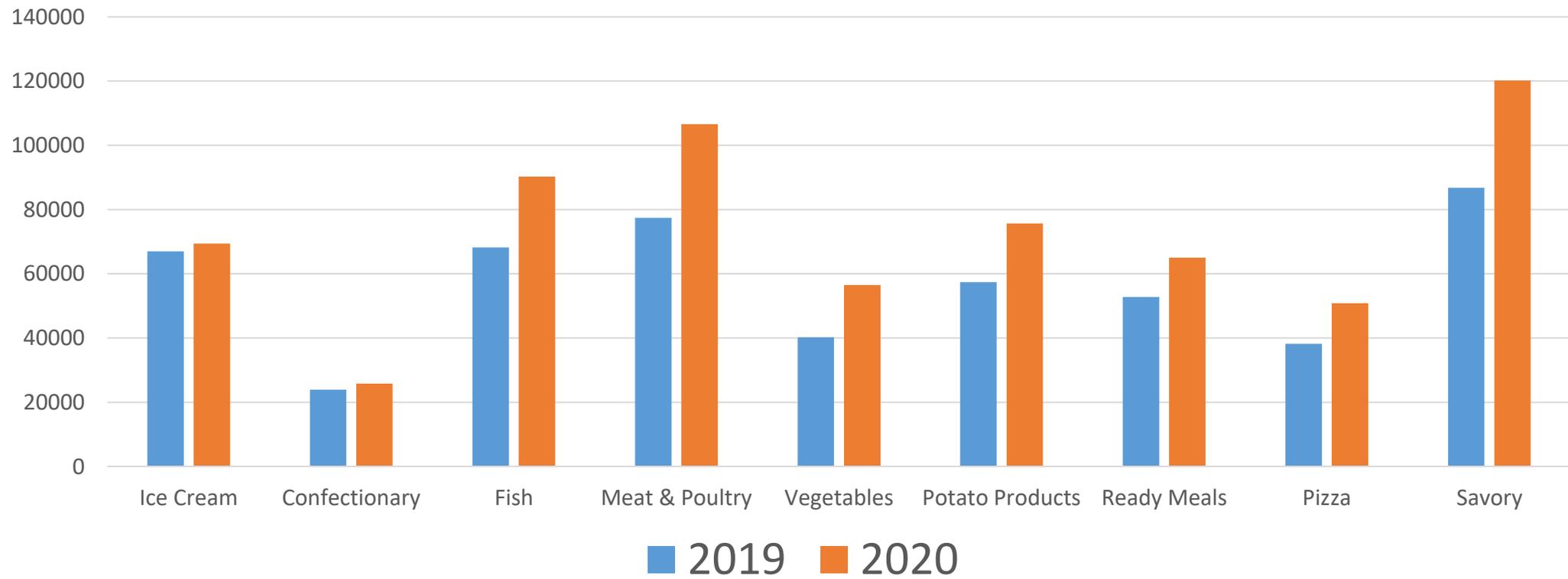
Frozen Categories

Volume 12 weeks



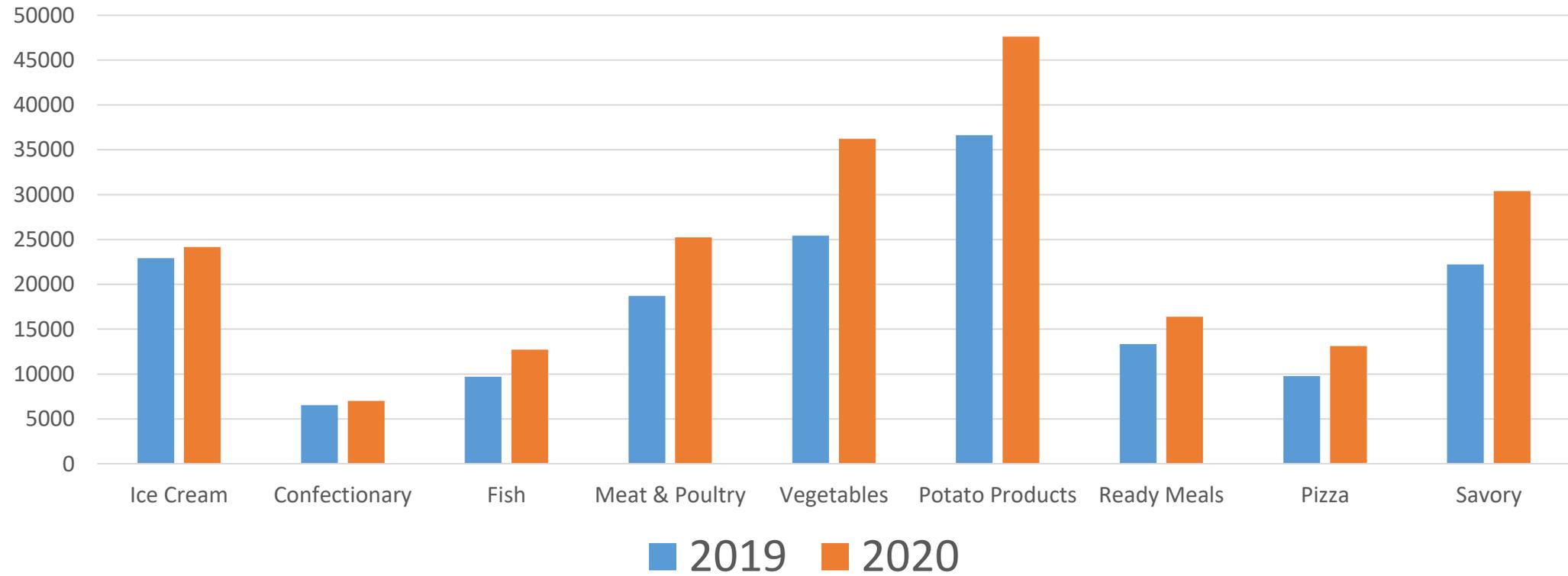
Frozen Categories

Value 4 weeks



Frozen Categories

Volume 4 weeks



Frozen Categories

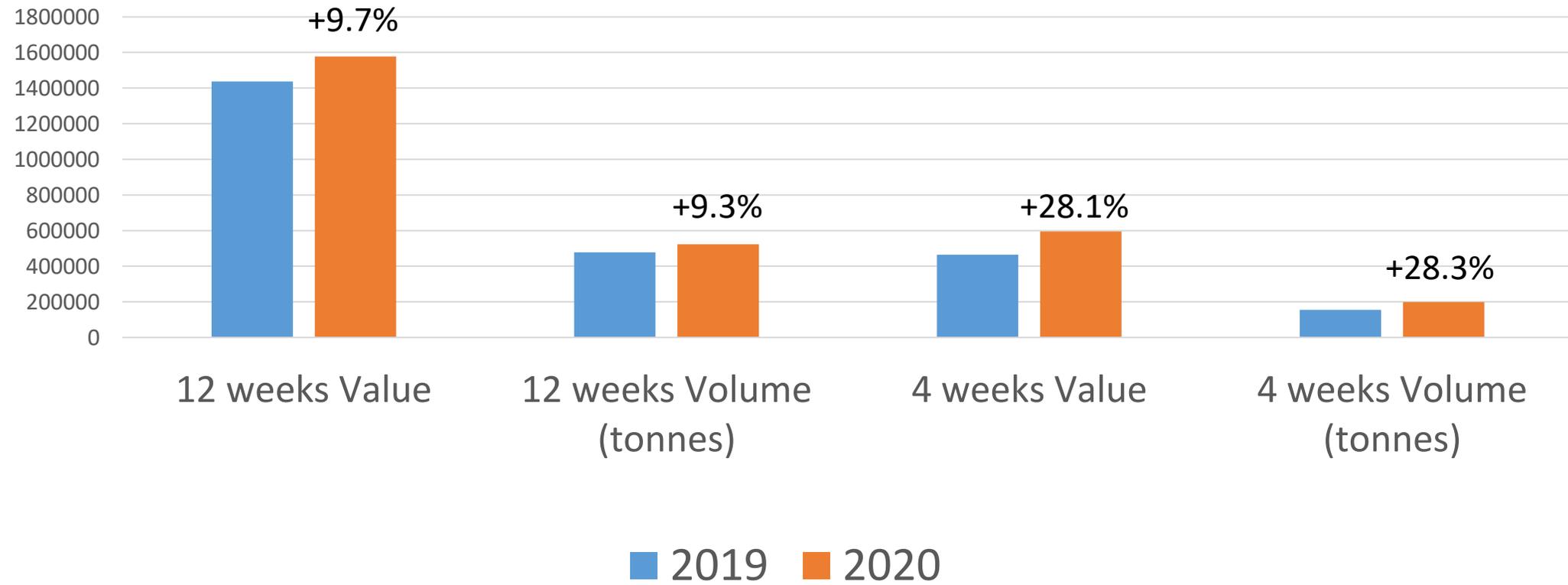
- There is evidence that the mix of sales has changed over the last few weeks.
- Categories that consumers can use in home cooking are showing strong growth.
- Vegetables are showing the highest value and volume growth.
- The savoury category is the second highest. Products in this category are Bread, Cooked poultry, Meat Products, Processed Poultry, Savoury Bakery, vegetarian products.

Frozen Categories

- Interestingly treat areas such as confectionary and Ice Cream have recorded the lowest growth rates.
- Consumers starting to show recessionary shopping habits such as a move into scratch cooking or is it because people have more time at home.
- Frozen also seen as way to buy and store with out waste.

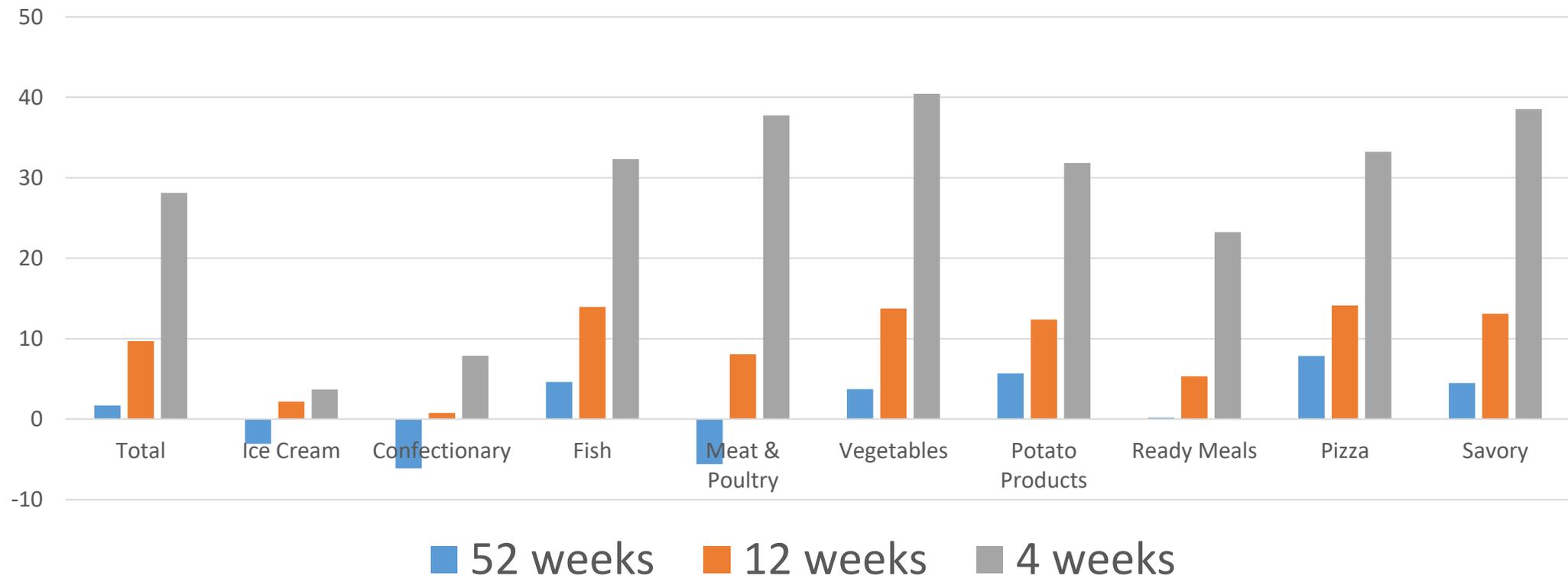
Frozen Market

Total Frozen 12 and 4 weeks



Frozen Categories

Value Growth Rates



Frozen Categories

Volume Growth Rates

