

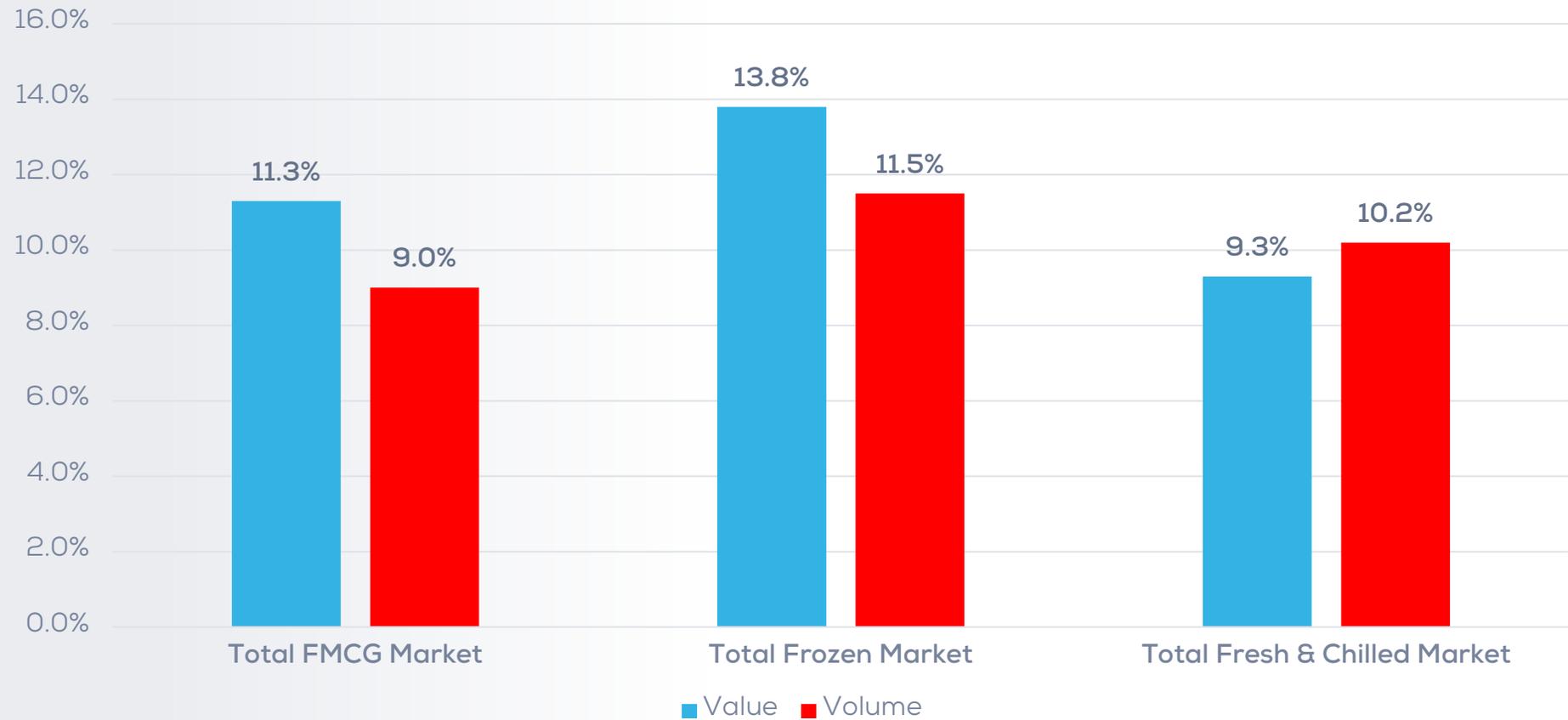
Kantar Data 29th November 2020



KANTAR



Total Market Growth (YOY)



Kantar Data 52 week data – 29th November 2020



Total Market

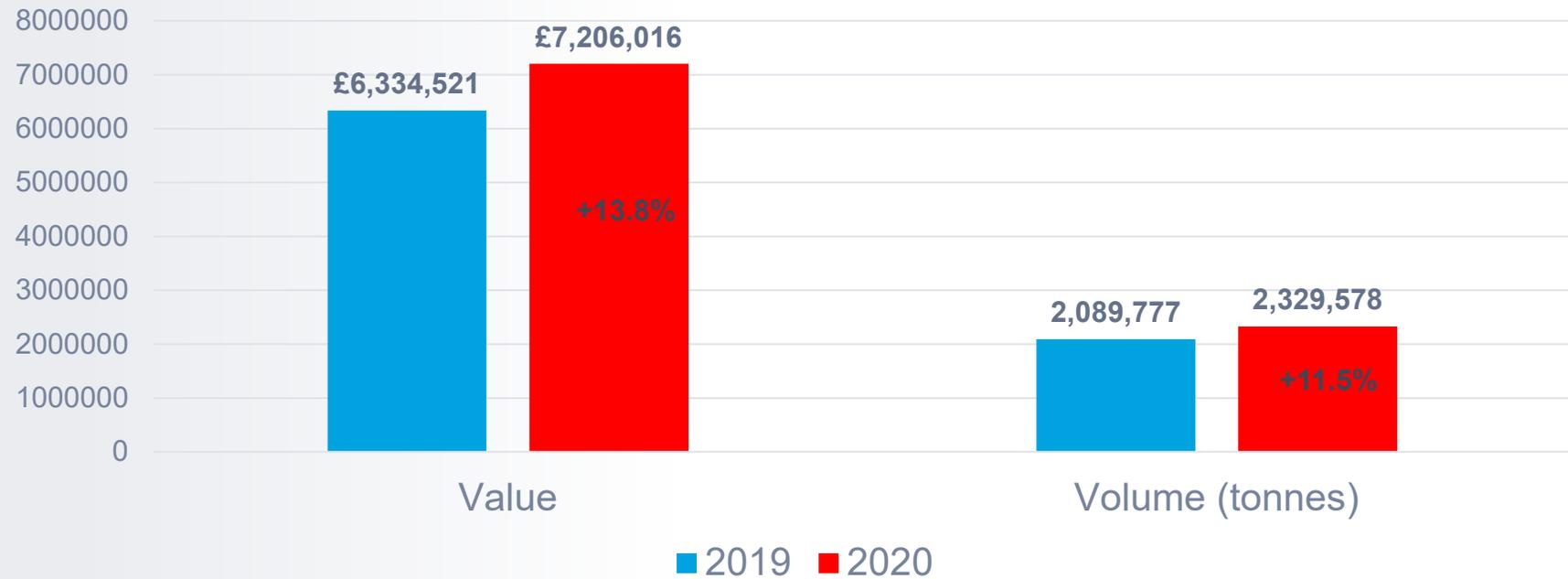
- ▶ The overall grocery market has grown 11.3% in value and 9.0% in volume over the 52 week period.
- ▶ Frozen has out performed total grocery growth in both value +13.8% and volume +11.5%.
- ▶ Over the 52 week period the frozen category has added £871m in sales value and 240 tonnes in volume.
- ▶ The frozen category has also out performed the Fresh and Chilled category in percentage growth terms both value and volume.

Kantar Data 52 week data - 29th November 2020



Frozen Category

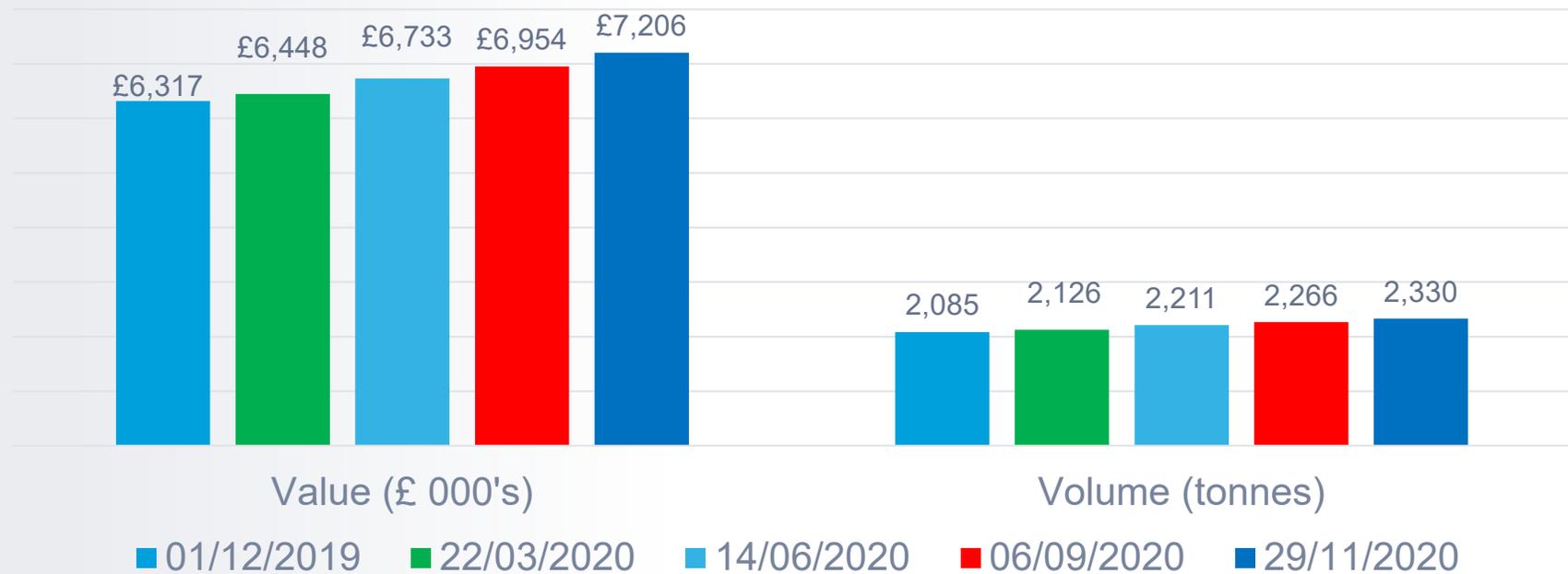
Total Frozen 52 weeks



Kantar Data 52 week data – 29th November 2020

Frozen Category

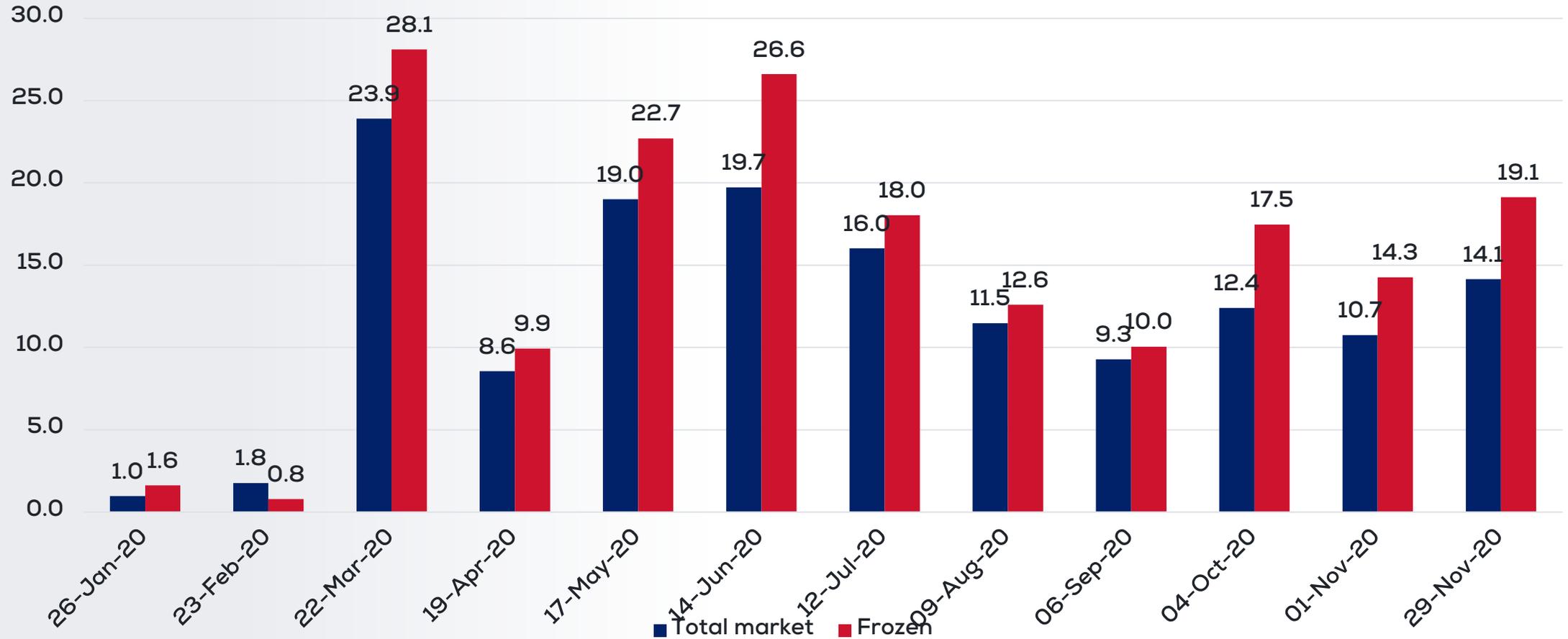
Total Frozen 52 weeks



Kantar Data 52 week data – 29th November 2020



Grocery Market vs Frozen Value Sales 4 week growth rates



Kantar Data 4 week data



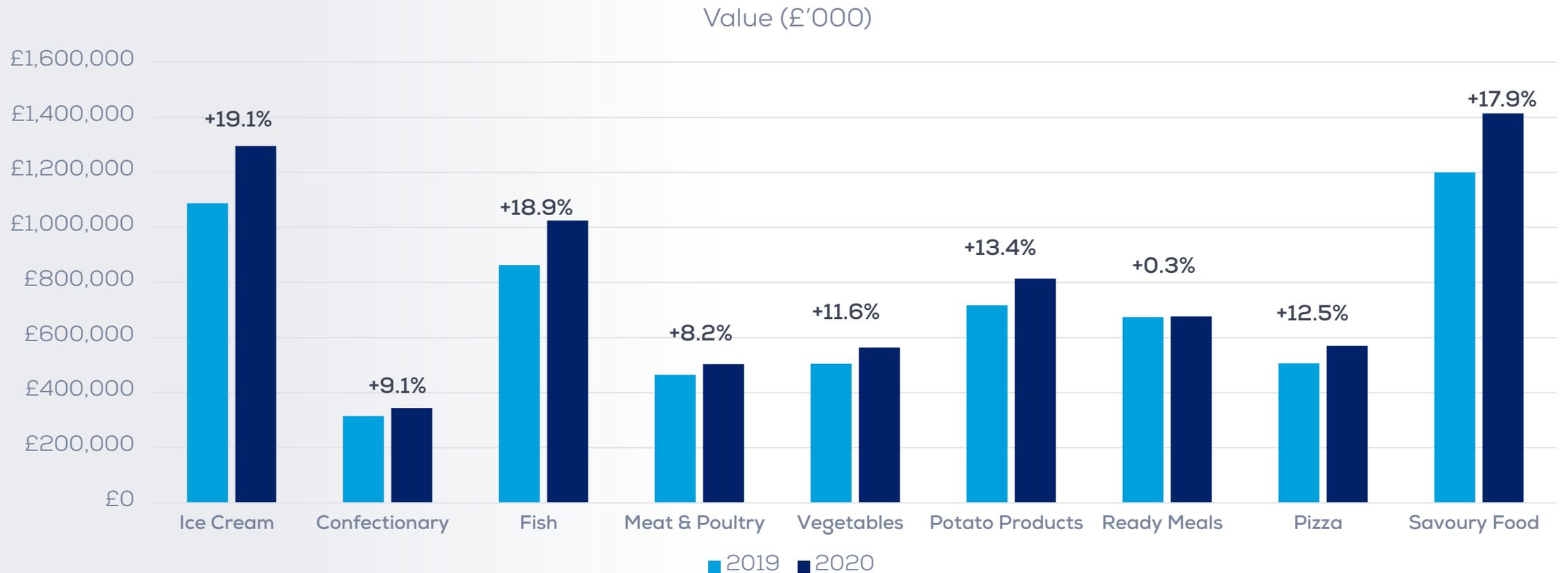
Frozen Category

- ▶ The performance of the Frozen category remains very positive and has seen continued growth ahead of total grocery.
- ▶ Since the last data set in Sept the frozen market has added another £252m in value sales.
- ▶ Based upon the 5 data sets value sales have grown by £889m, since 1/12/19.
- ▶ Data shows that the frozen category has out performed the overall Grocery Market growth rates since the pandemic began

Kantar Data 52 week data – 29th November 2020



Frozen Categories

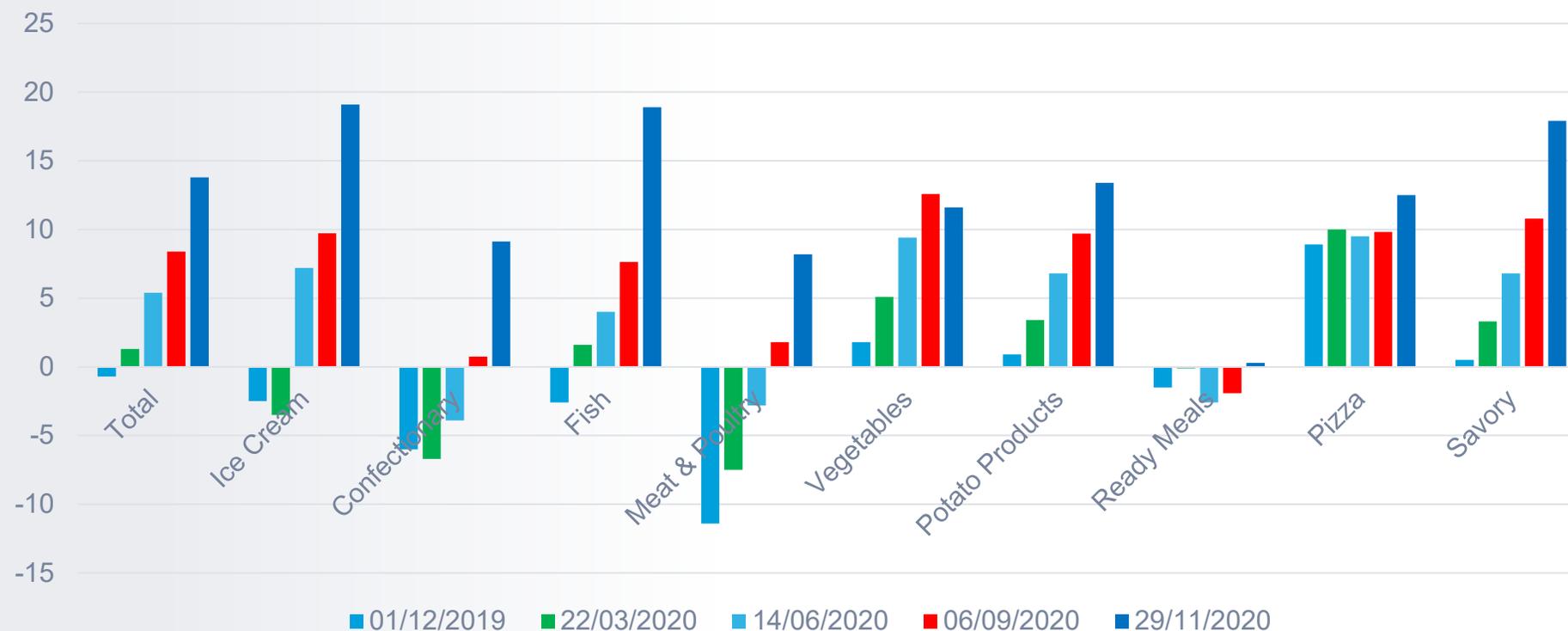


Kantar Data 52 week data - 29th November 2020



Frozen Categories

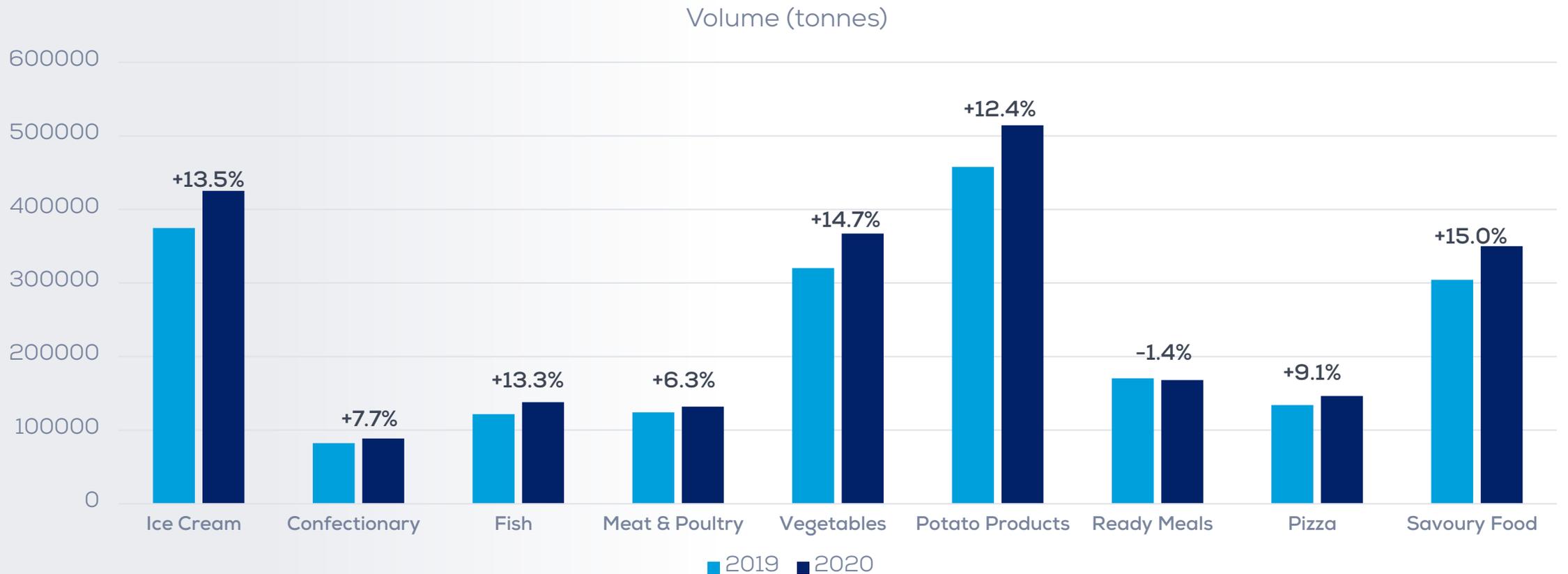
Value Growth Rates 52 weeks data



Kantar Data 52 week data – 29th November 2020



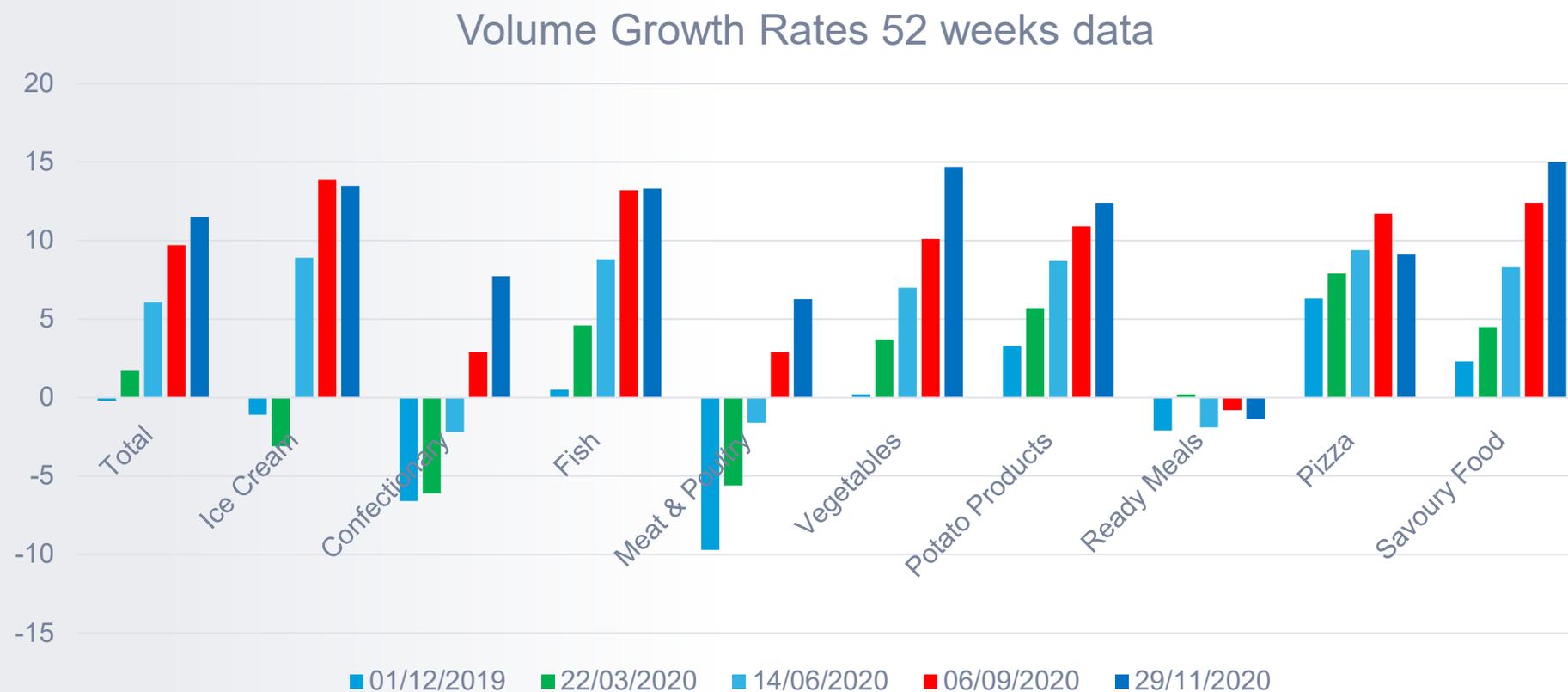
Frozen Categories



Kantar Data 52 week data - 29th November 2020

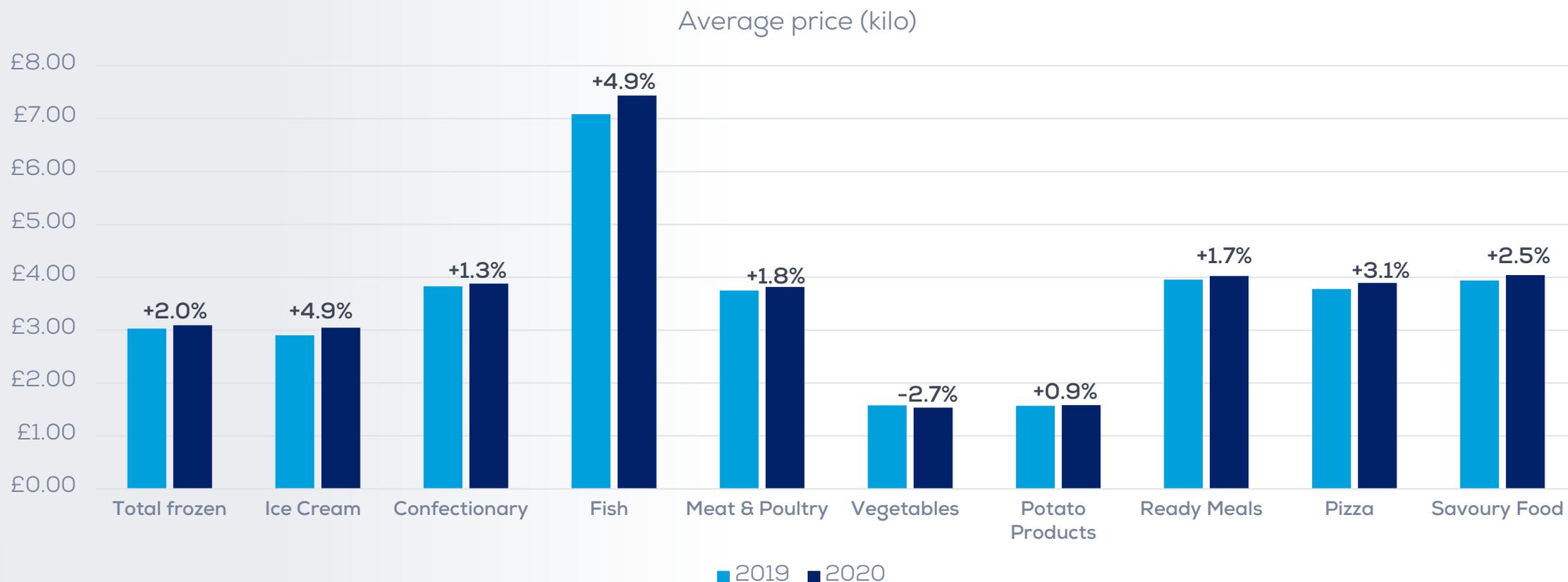


Frozen Categories



Kantar Data 52 week data – 29th November 2020

Frozen Categories



Kantar Data 52 week data - 29th November 2020



Frozen Categories

- ▶ Of the 9 categories reported by Kantar all are in value growth, with 6 in double digit growth.
- ▶ It is a similar picture in volume with 8 categories in growth, with 5 in double digit growth
- ▶ Average price has increased by 2.0% Vs. +2.1% for total grocery and -0.8% for Fresh & Chilled.
- ▶ The average price per kilo in the Sept data was £3.069 Vs. £3.093 now +0.8%

Frozen Category

- As we reported in the last update whilst retail has seen strong growth Out of Home has been decimated by the pandemic.
- Peter Backman has lowered his forecast for frozen sales down from £1.6bn to £1.4bn.
- This means the total frozen food market has declined by £187m, or a 2.1% decline a slight improvement from the Sept position.
- However part of the retail data from Kantar includes sales from 29 Nov 2019 to early March 2020 before Covid-19 arrived. The forecast from Peter Backman is only for 2020, so we could see this gap narrow.

Frozen Sales value September 2020



■ Retail ■ Out of Home

Retail is Kantar Data 52 week data – 29th November 2020 / Out of Home Peter Backman est 2020