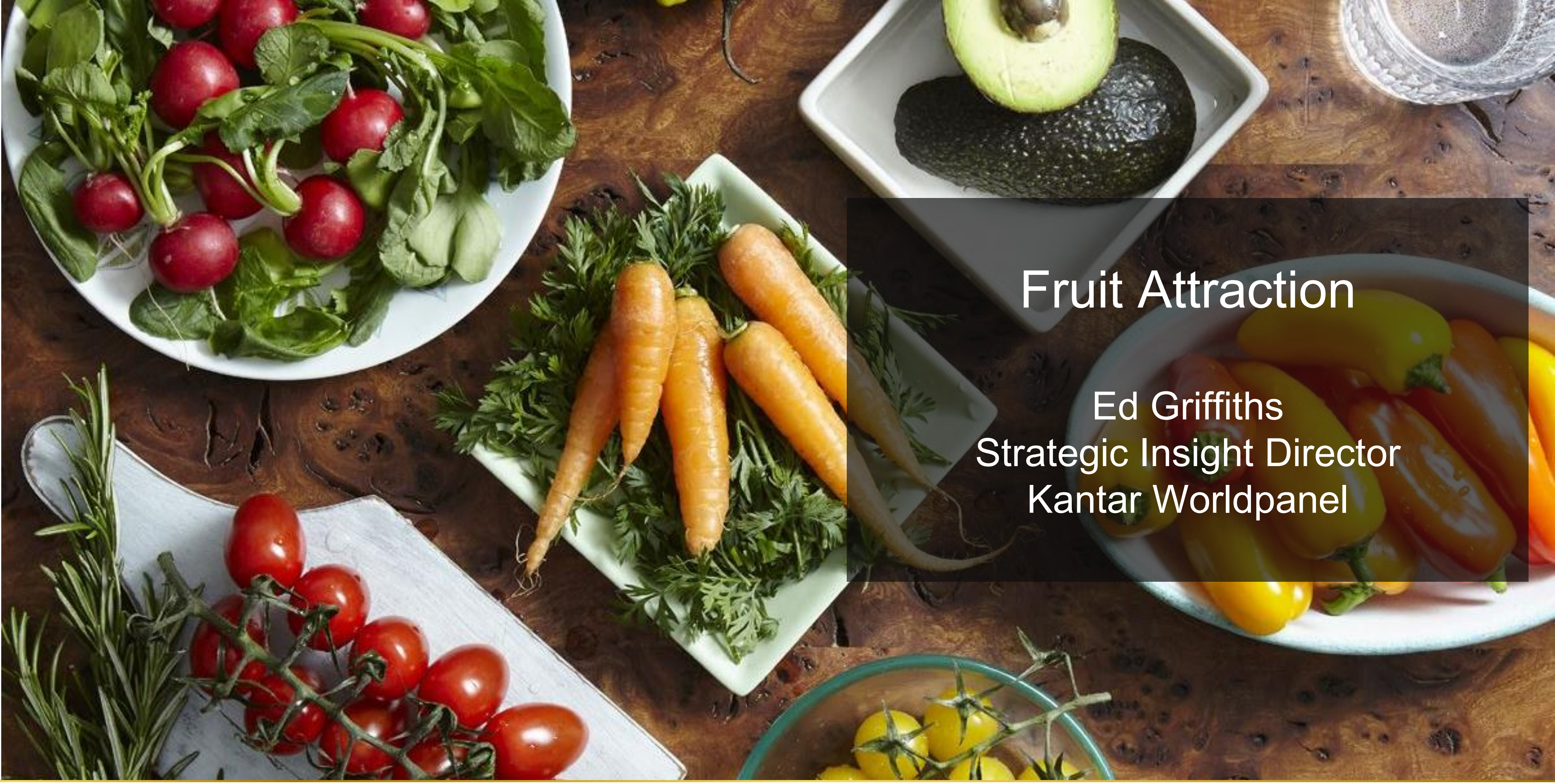


Fruit Attraction

Ed Griffiths
Strategic Insight Director
Kantar Worldpanel

The largest shopper panel in Great Britain

Geographically and demographically representative of the population of GB

30,000

Households in GB

How does Worldpanel work?

Take Home purchases scanned by palm pilot and clicker technology

Data retrieved and collated into databases on a
4 weekly cycle

Data converted into insight

Produce Engagement

General Retail

Organics in the UK

The UK is more engaged with Produce than ever before

Its not just about how often we go either; shoppers are buying across a broader repertoire

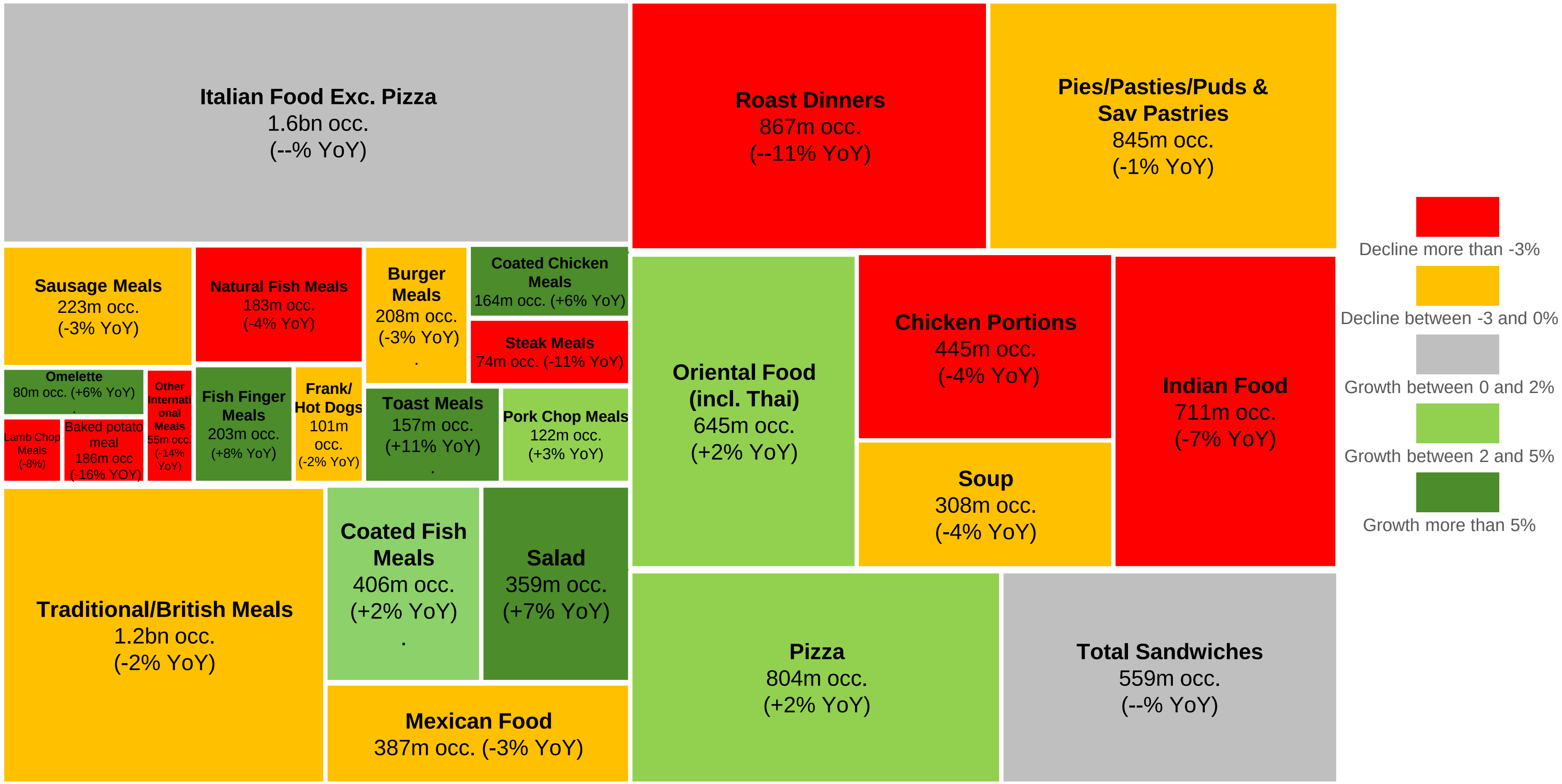
2014

46 different items in an average repertoire

2018

50 different items in an average repertoire

A more diverse dinner plate drives growth of repertoire but also highlights the challenges many markets face as host dishes decline.



Health is a growing factor amongst consumers in the UK, with 31% of all meal occasions being consumed for reasons relating to health

With Produce a poster child for many campaigns it's no surprise that Produce sees 71% of all consumption occasions flagged as for health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Health

Fruit and veg: For a longer life eat 10-a-day

By James Gallagher
Health and science reporter, BBC News

23 February 2017

Share

ISTOCK

Eating loads of fruit and vegetables - 10 portions a day - may give us longer

Top Stories

Rising numbers leaving UK

About 130,000 EU the UK in the year highest number sin

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'I was lucky to school'

2 hours ago

British Gas own jobs

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Katie's story: B Olympic debut


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Forget five a day, eat 10 portions of fruit and veg to cut risk of early death

Scientists say even just 2.5 portions daily can lower chance of heart disease, stroke, cancer and premature death

Advertisement

Expert advice on how to talk to your children about cance

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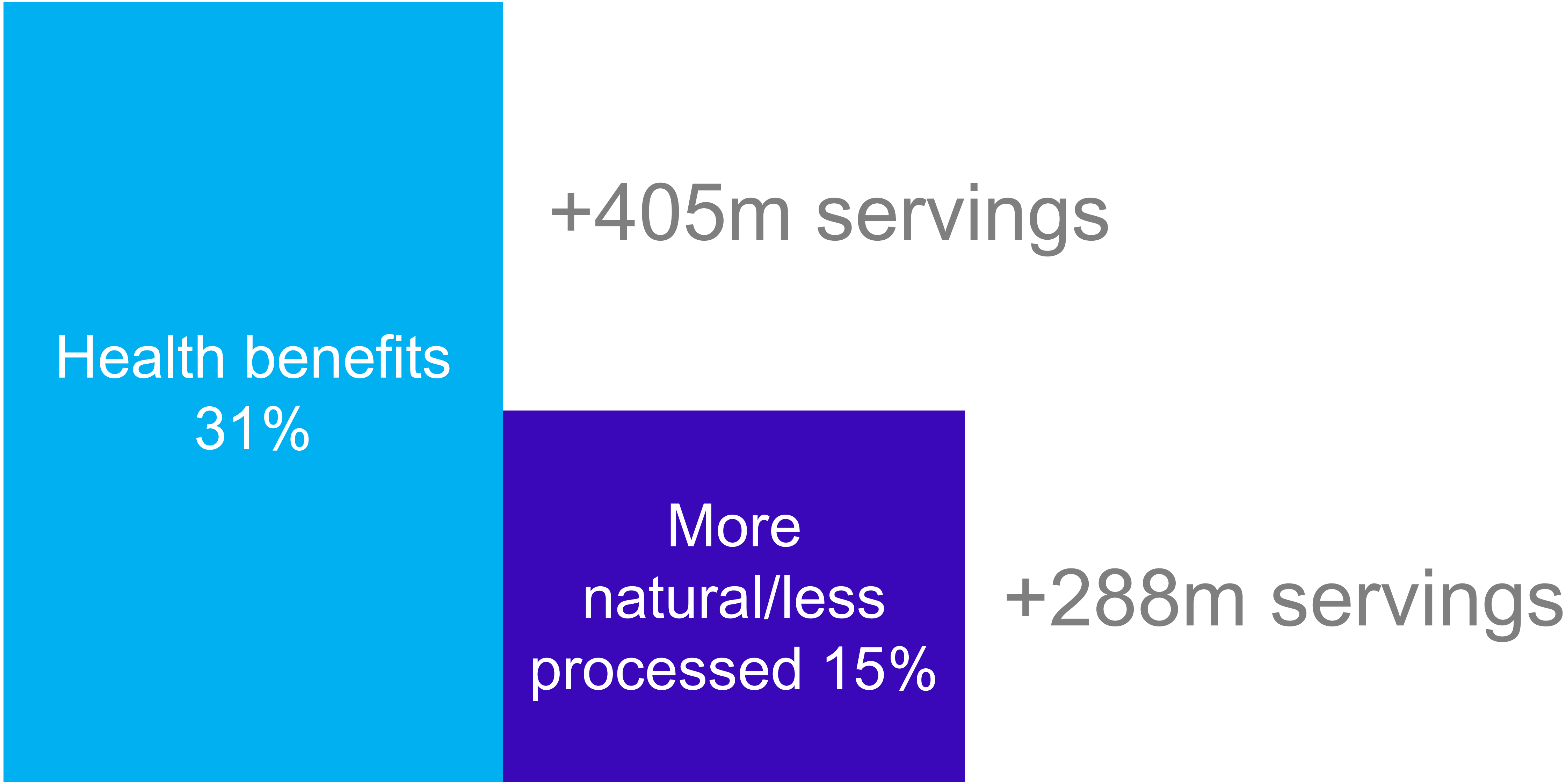

Health benefits
31%
+405m servings
More
natural/less
processed 15%
+288m servings

More demands means more opportunities to trade up consumers

Retail premium per serving based on number of reasons for choice

The premium paid for health has increased year on year

Health 2016

£

+5%

Health 2017

£

+7%

Health 2018

£

+9%

Produce Engagement

General Retail

Organics in the UK

Volume flat at -0.1%

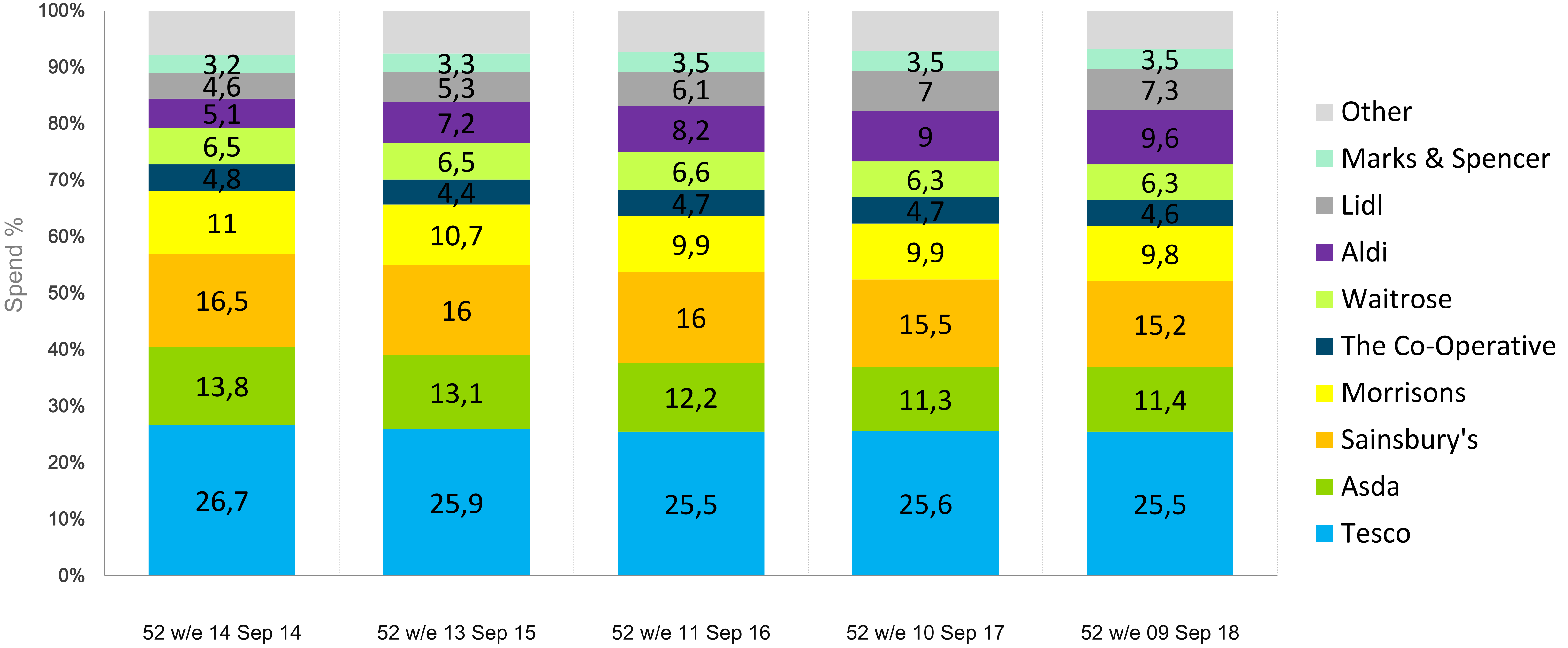
Value growth of +2.7%

Produce in the UK worth £11 Billion

£6.57 more per household

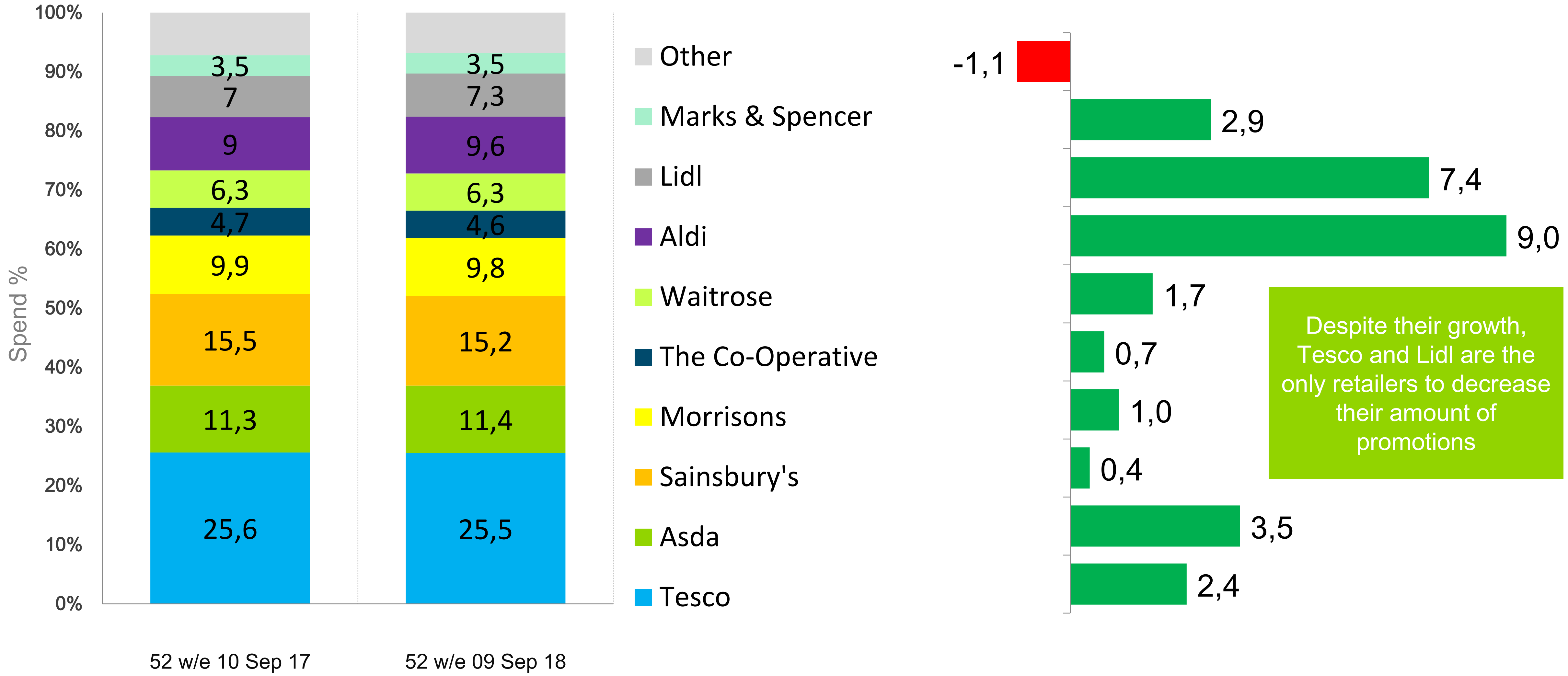
Much like the Grocery Market, the Big 4 have seen contraction over the last 5 years

Aldi and Lidl have gained 7.2% share between them



And in the latest year in a climate of price inflation, Lidl and Aldi reign supreme

Asda is the only Big 4 Retailer to experience an increase in share

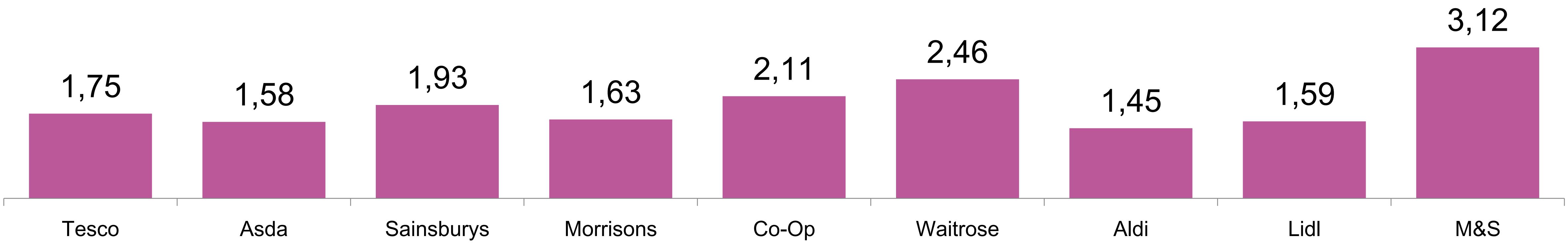


KANTAR WORLDPANEL

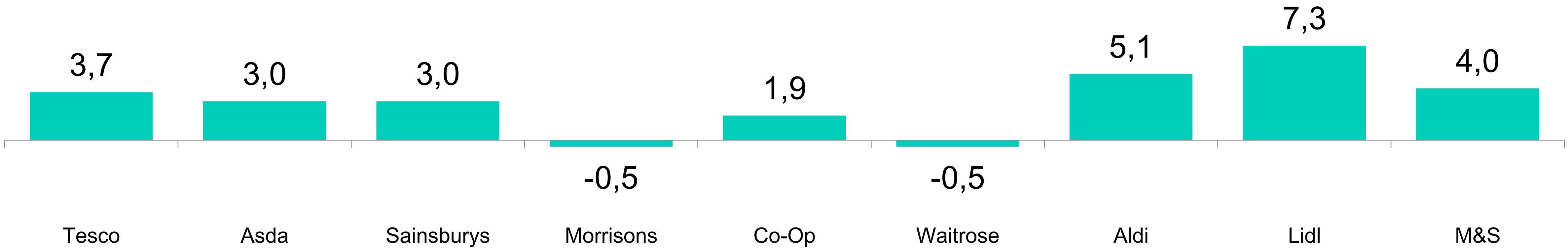
While the discounters inevitably win on price…

Their prices are inflating at the fastest rate

Price per KG



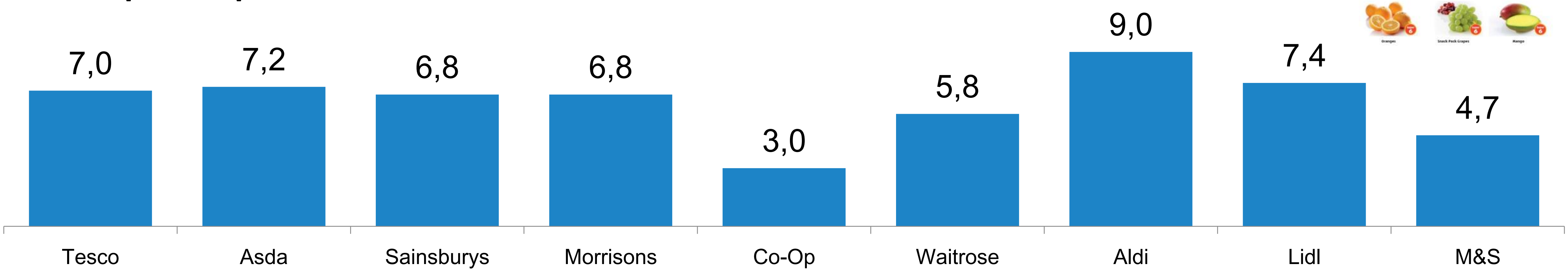
Price % Change



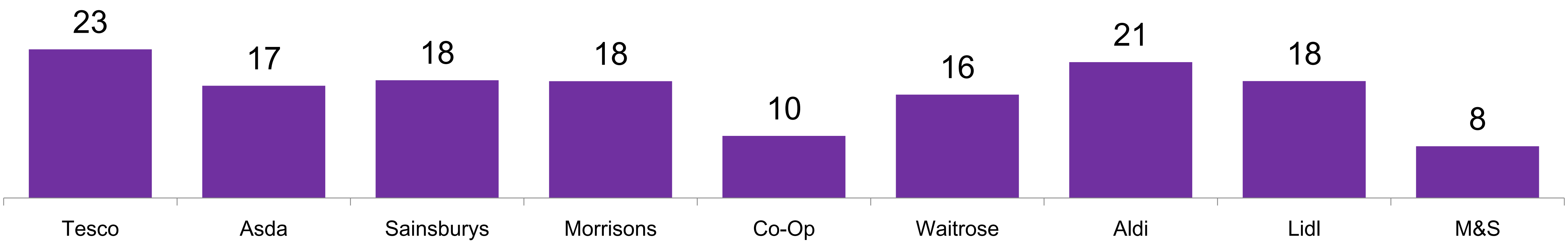
But prices creeping up doesn't deter shoppers – Lidl and Aldi ahead on key metrics

They drive category engagement above and beyond what we might expect

Items per Trip



Size of Repertoire



52 we 9 September 2018

A climate of price focus isn't going anywhere

Tesco Jacks launching with a key focus on fresh, locally sourced Fruit and Vegetables

Produce Engagement

General Retail

Organics in the UK

Organics over the last five years have seen considerable growth

£250 Million
Organics reached £250m in the latest year, up 40% over five years

£2.43 per Kilo
Organics being sold at 40% premium over standard Fruit and Veg

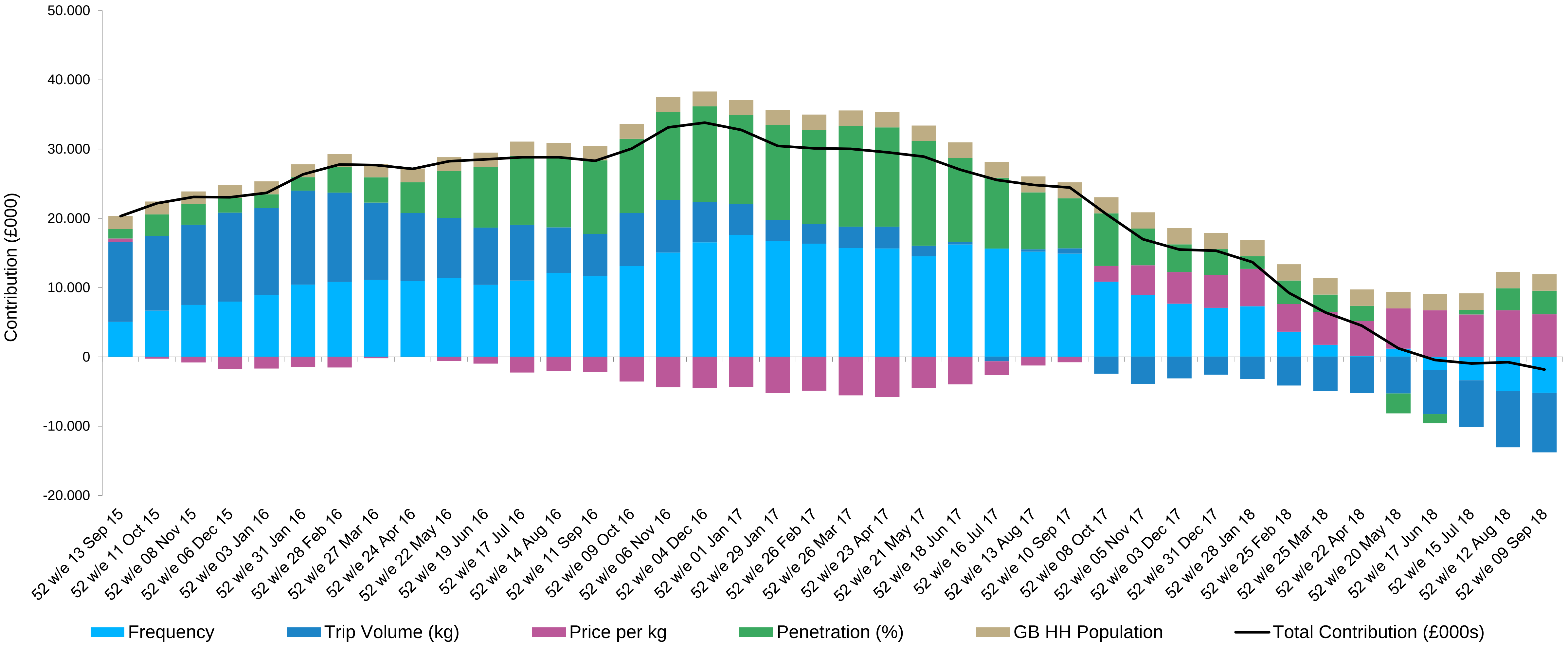
7 Trips
The average consumer only buys Organics 7 times in an average year (109 Trips at a Total Produce Level)

1 KG per Trip
Average trips see 2.2KG per basket; Organics 1.2KG behind this benchmark

63%
63% of the population bought Organic Fruit or Veg in the last year

Who?
Smaller, more affluent households without Children

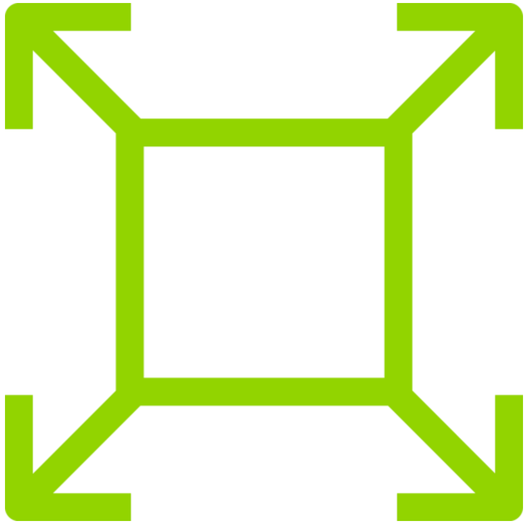
This growth has slowed dramatically however in the latest year with the market now in decline; Price a clear driver for this.



Where are the Organic Occasions going?

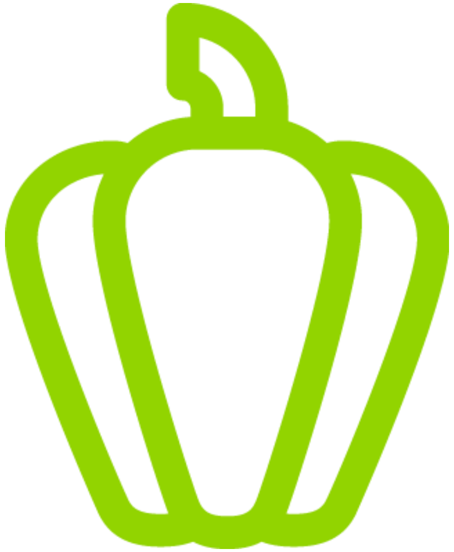
£1.4M switched from Organic to Standard

Existing Organic shoppers spent £2M less



£1.7M from produce shoppers continuing to expand their Organic Repertoire

The price war apparent even in the Organic market



Lidl is launching a new organic food range and it's all under £4

There are 28 products to choose from

Total Organic

-0.7% -£1.8M

Lidl Organic

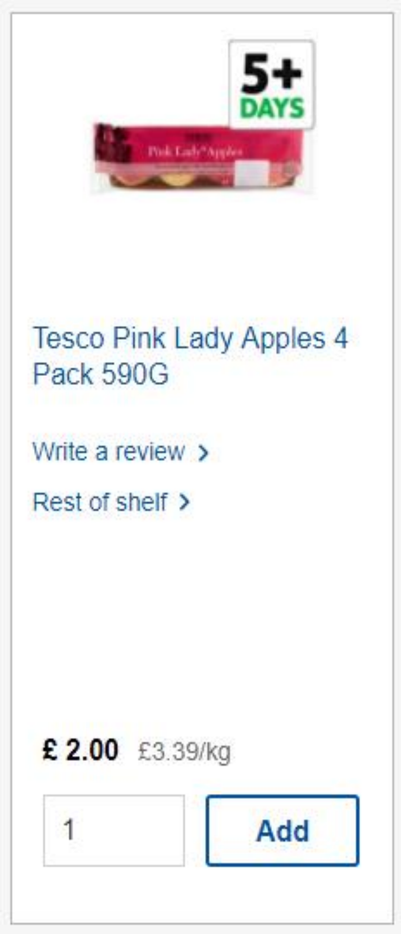
+50% +£6.3M

How can we drive Organic Growth?

Consumers will pay more for health

Organic consumed more for health compared to other Produce Benchmarks

Create a reason at the fixture to buy Organic that justifies the price



Produce Engagement

General Retail

Organics in the UK

Thank you

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