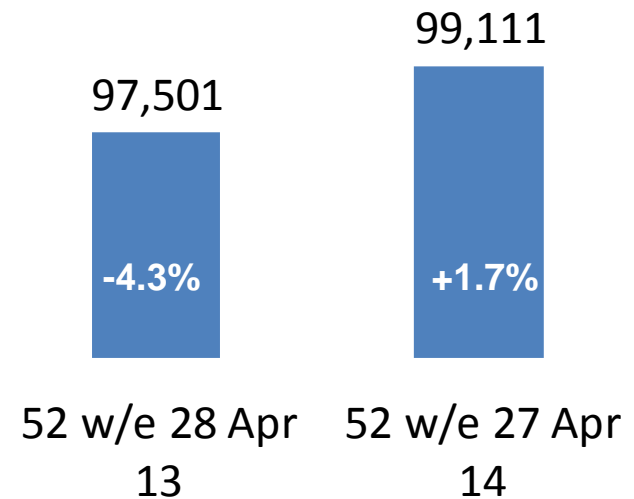


## Organic Food

Data to May 2014

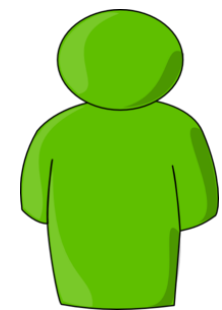


The Organic Market is in growth of just under 2% recovering from previous periods of decline



Value sales €000's and YOY Growth

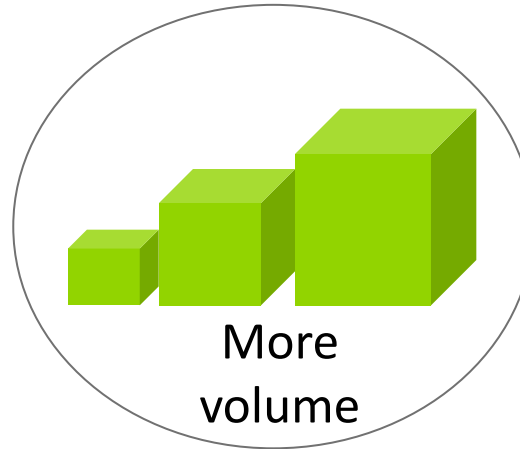
Growth is driven through an increase in the number of packs bought per trip



More  
shoppers



More  
baskets

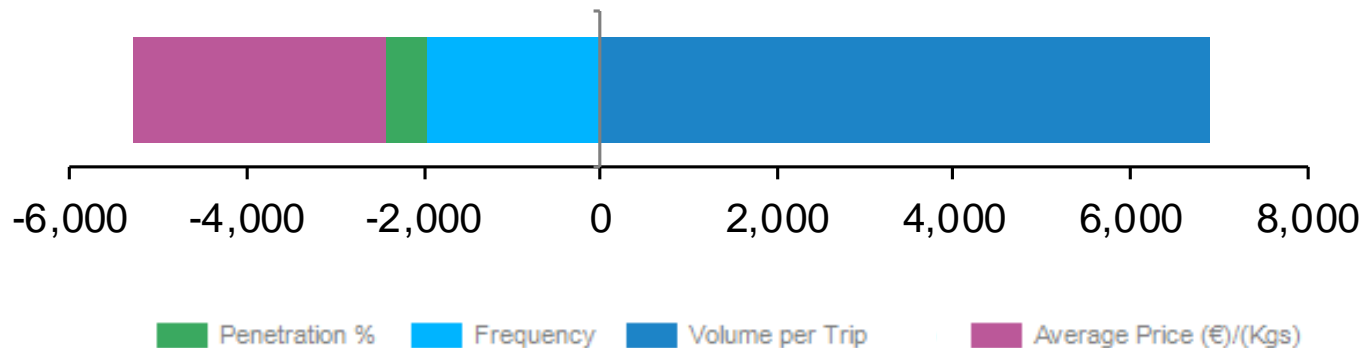


More  
volume



Higher  
price

**Value up 1.7% worth €1,609k**

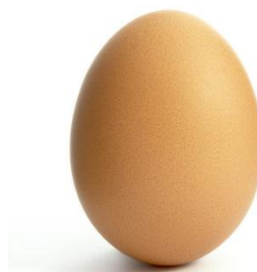




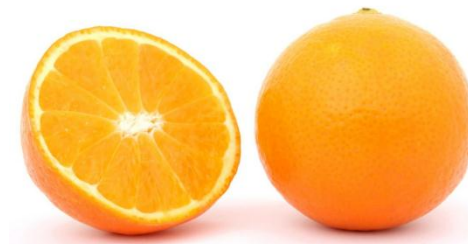
Savoury Cooking +36.6%



Milk +27%



Eggs +19.4%



Fruit +12.7%

Gaining share



Biscuits +3.6%



Fresh Meat +2.3%



Yoghurt +0.3%



Cereal -0.2%



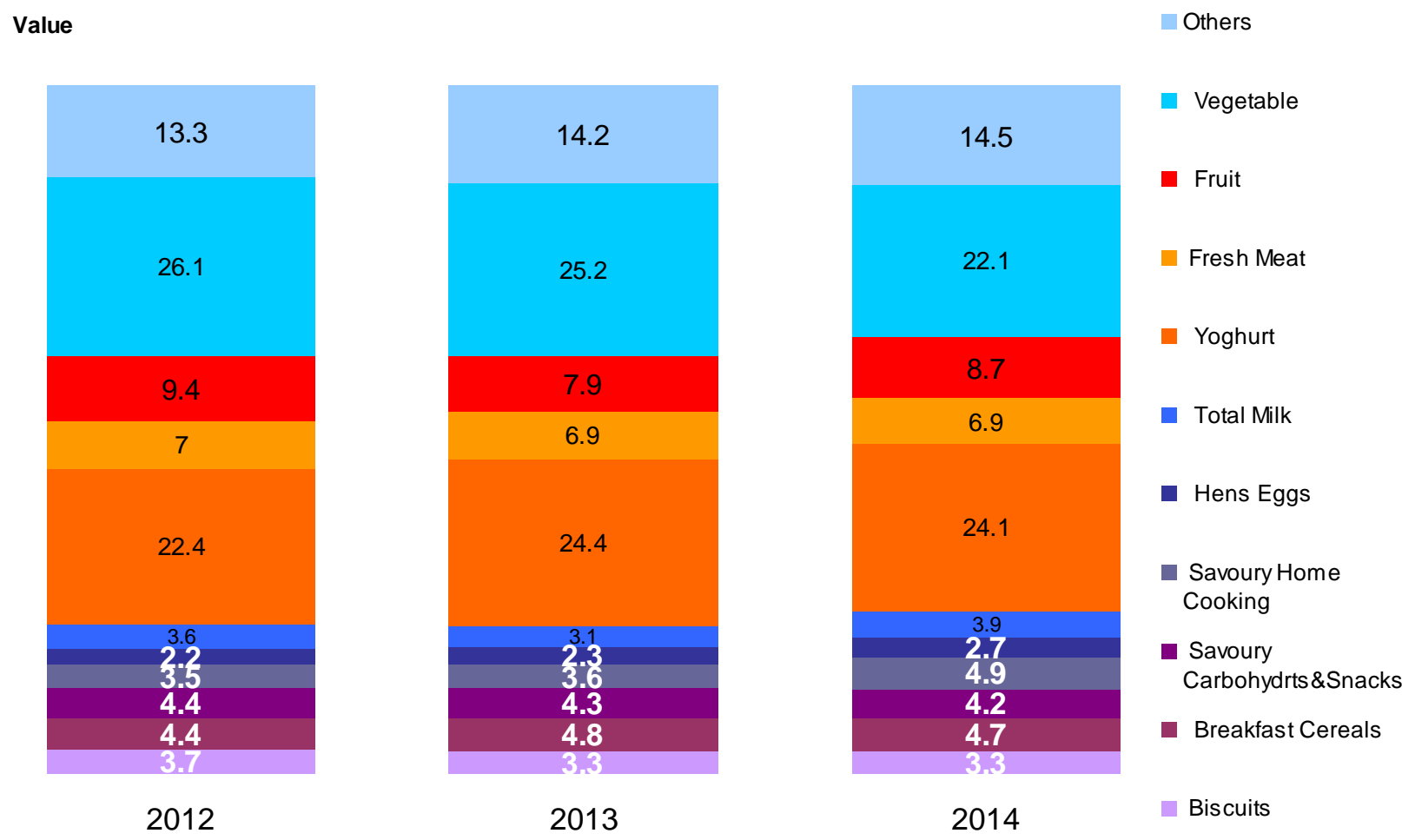
Savoury Carbs -0.1%



Vegetable -10.9%

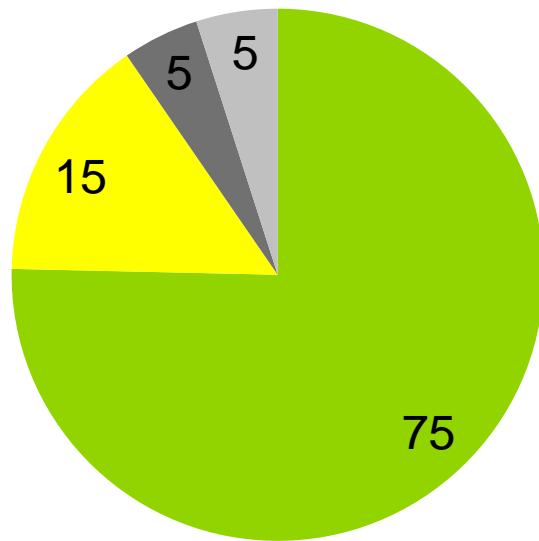
Losing share

# Organic Veg and Yoghurt are the two largest sectors and vital for Organic performance

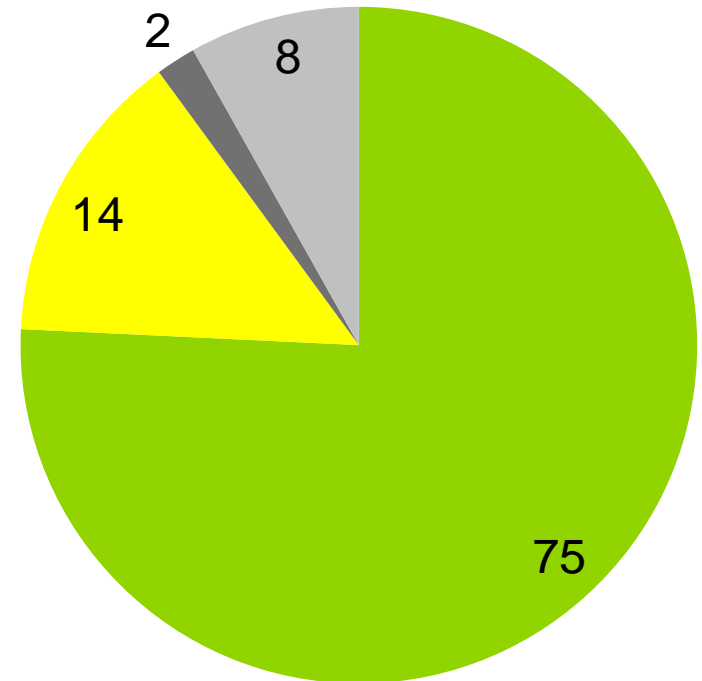


More Organic food goes through smaller outlets than average grocery however sales in the Main Mults make up 75% or €74m of the €99 million Organic food Market

**Total Grocery**

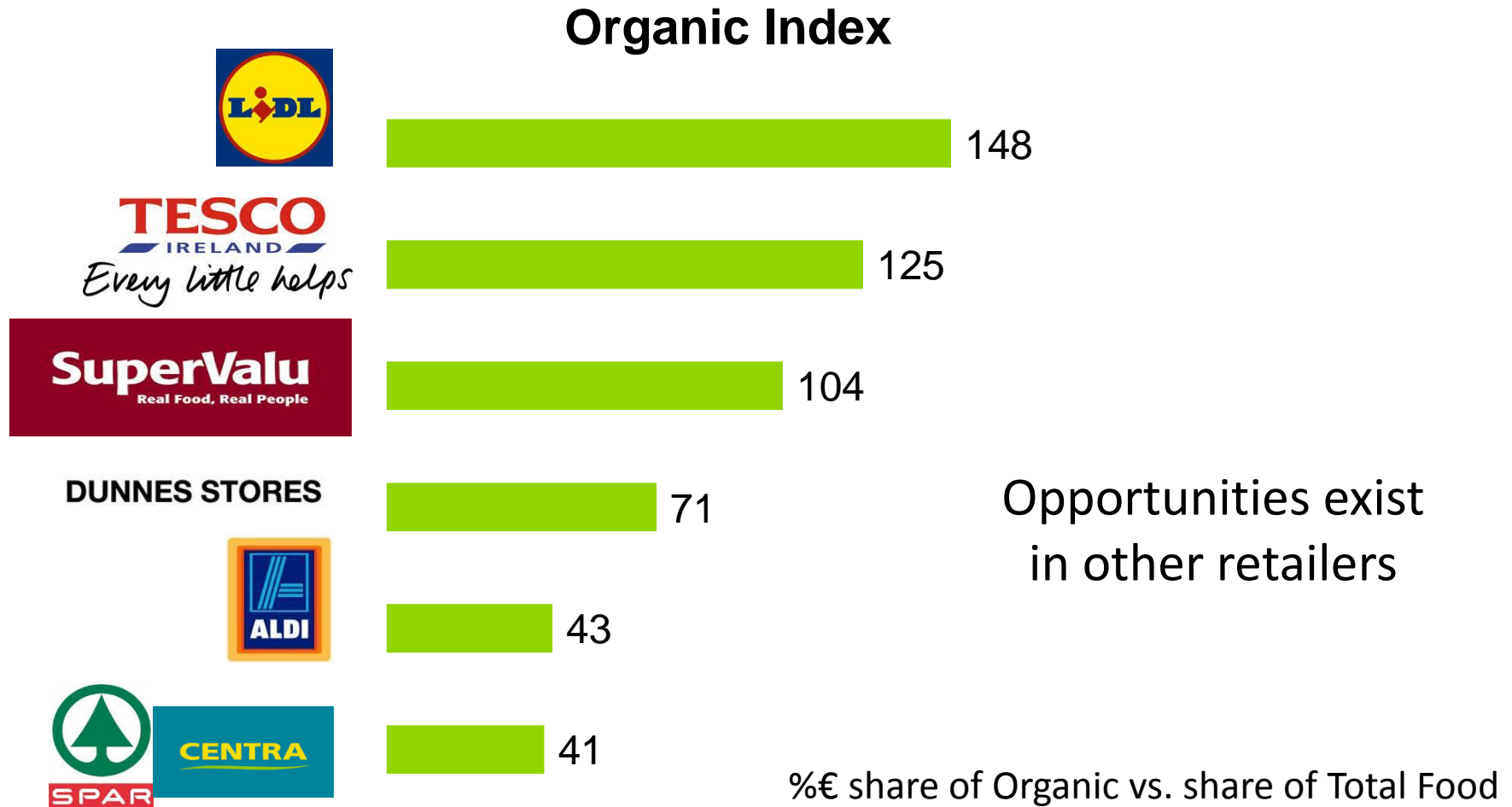


**Organic**



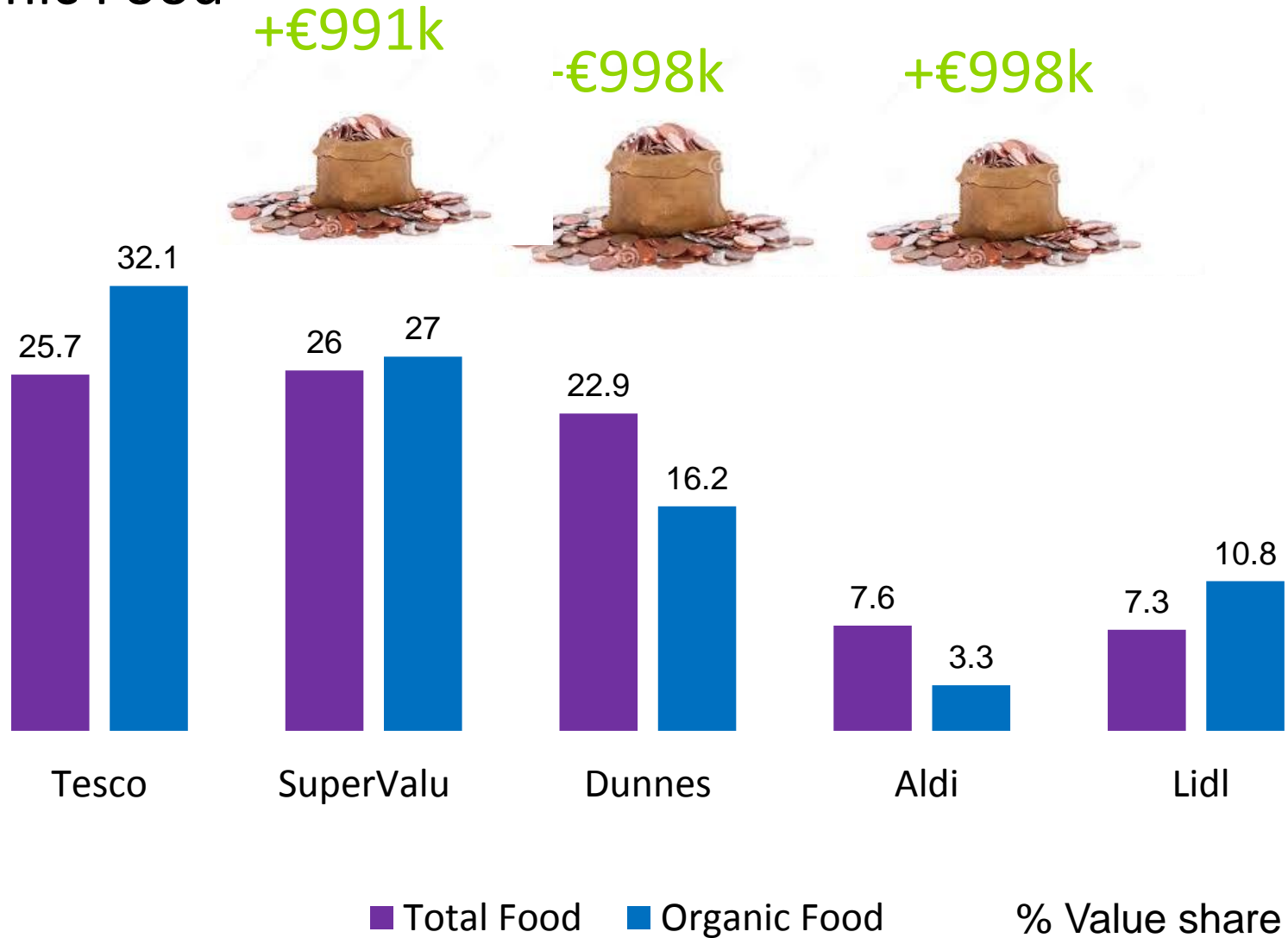
% Value share

# Lidl and Tesco and key for Organic food



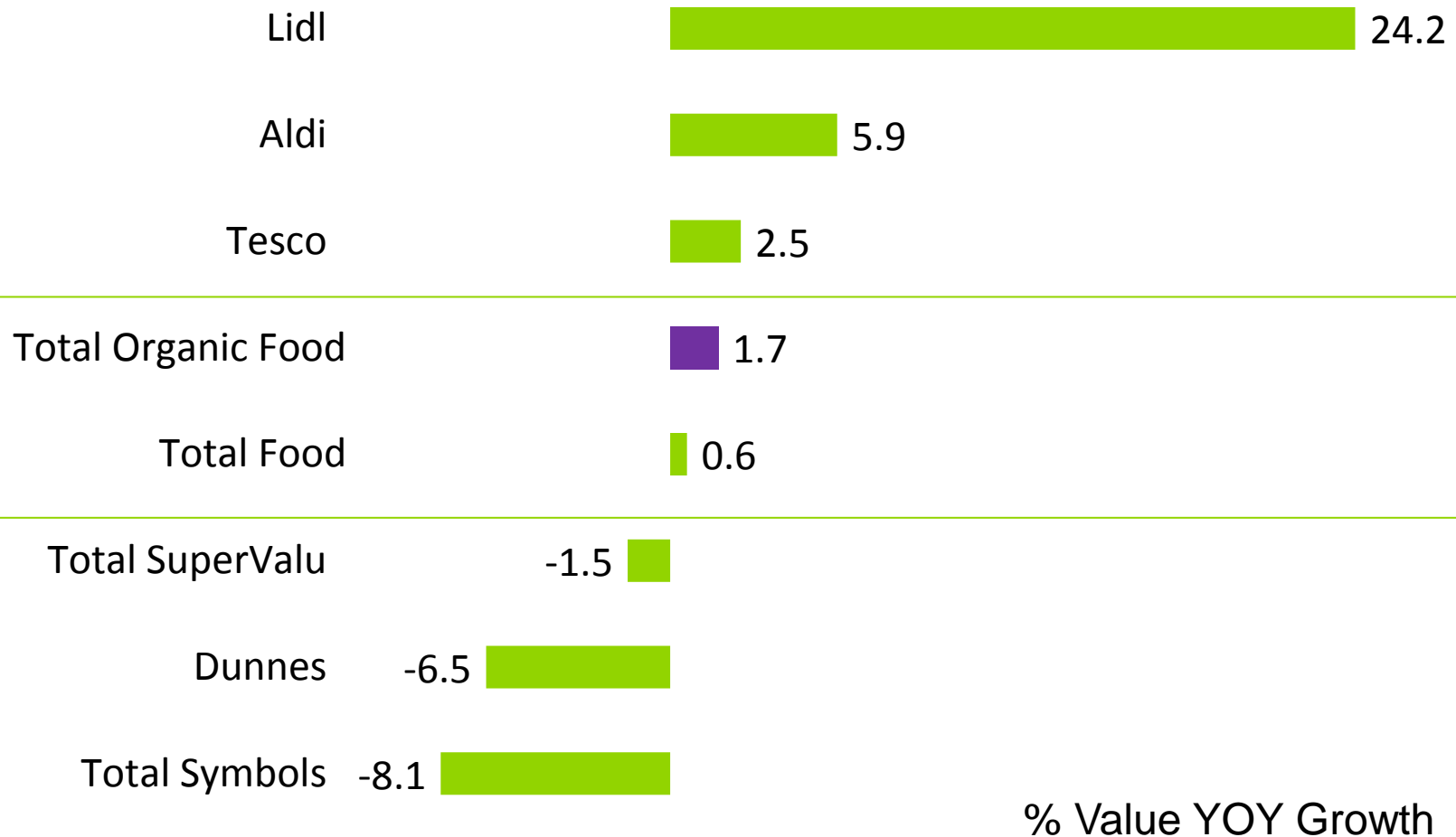


# Opportunities with retailers to expand their share of Organic Food

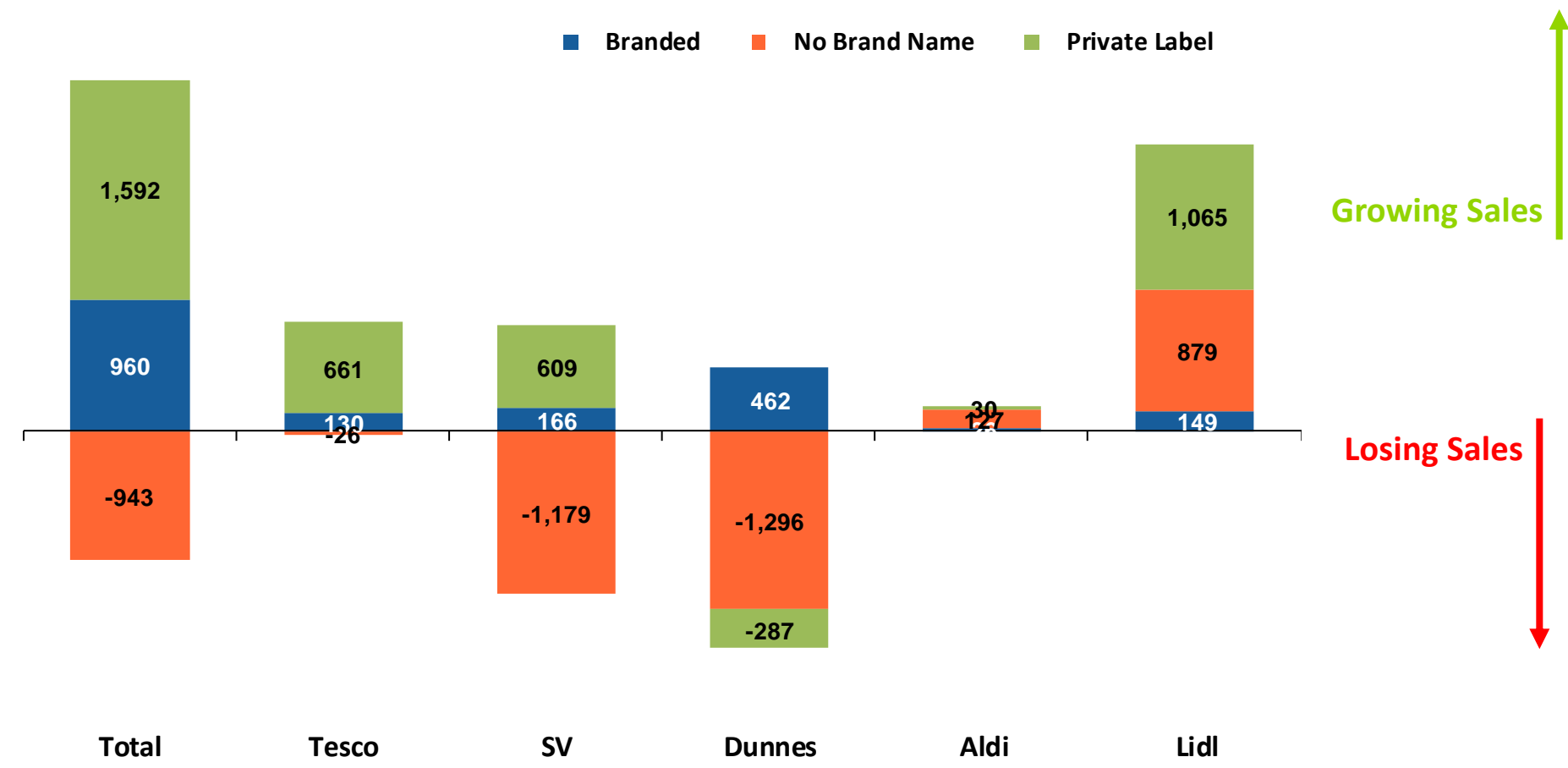




Organic food is growing ahead of the general market and posts a positive performance for Tesco

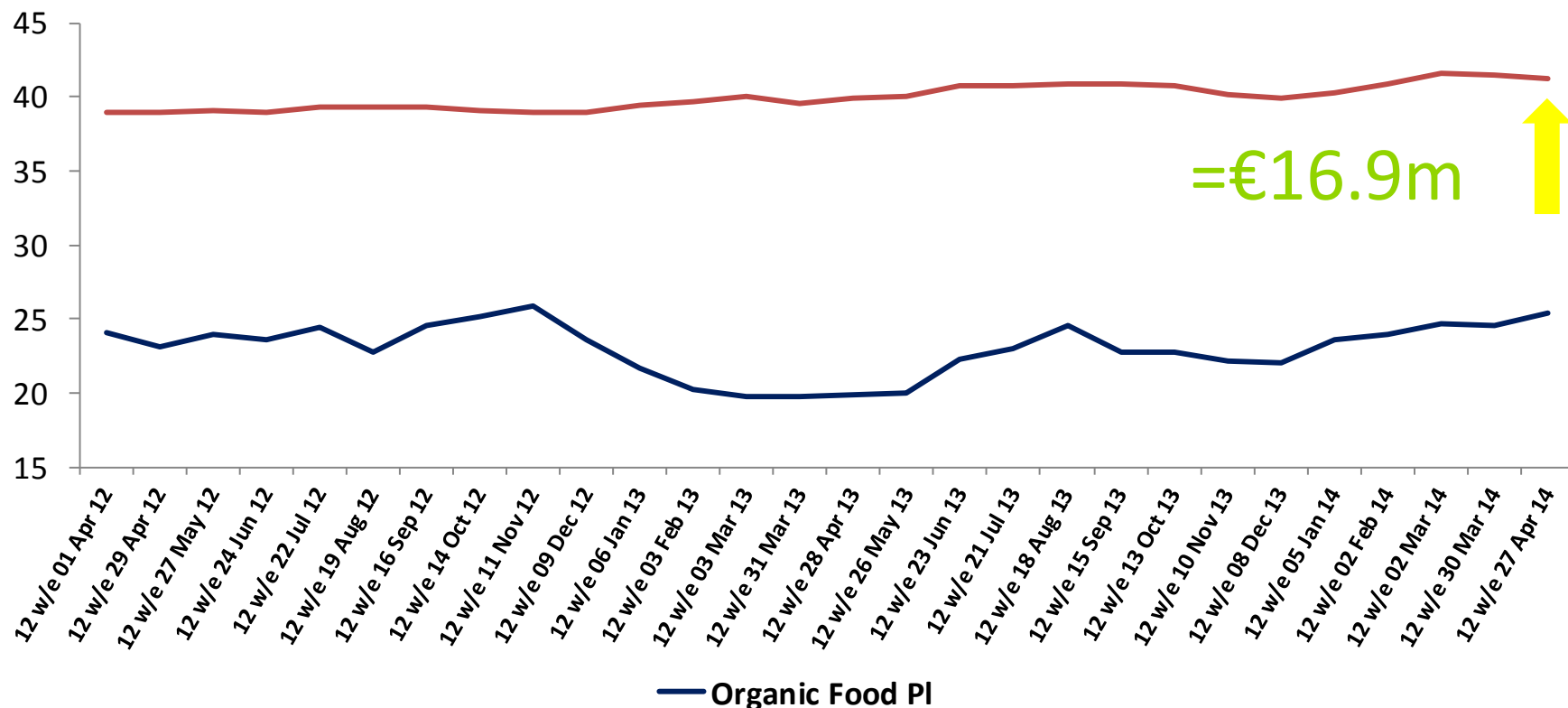


# Private label products drive sales in Tesco and Lidl, the two strongest retailers in Organic



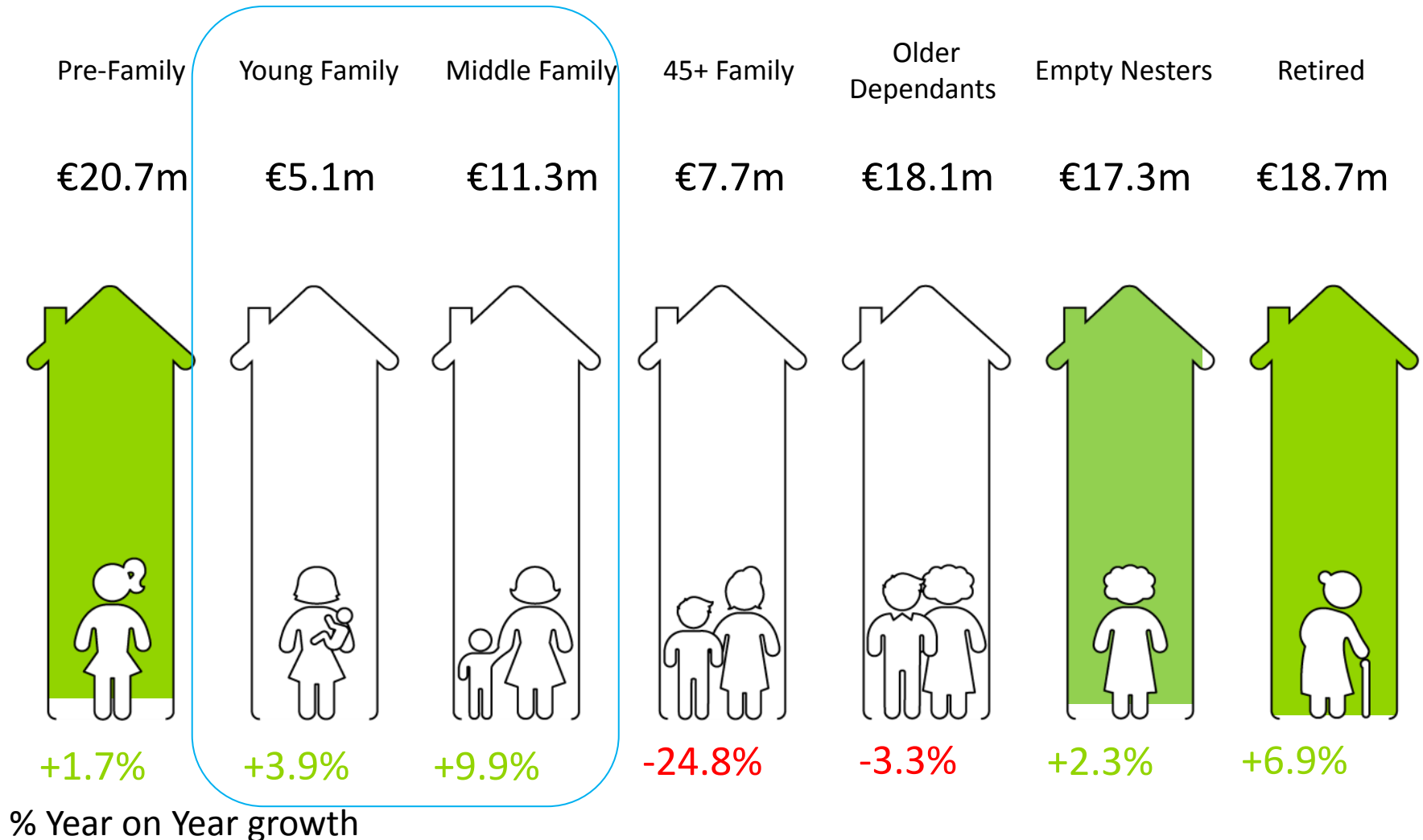
52w/e Organic Food branded vs PL value sales change YoY €000s

# Organic Food PL is still behind the average Grocery PL share of 38% leaving room for growth through PL

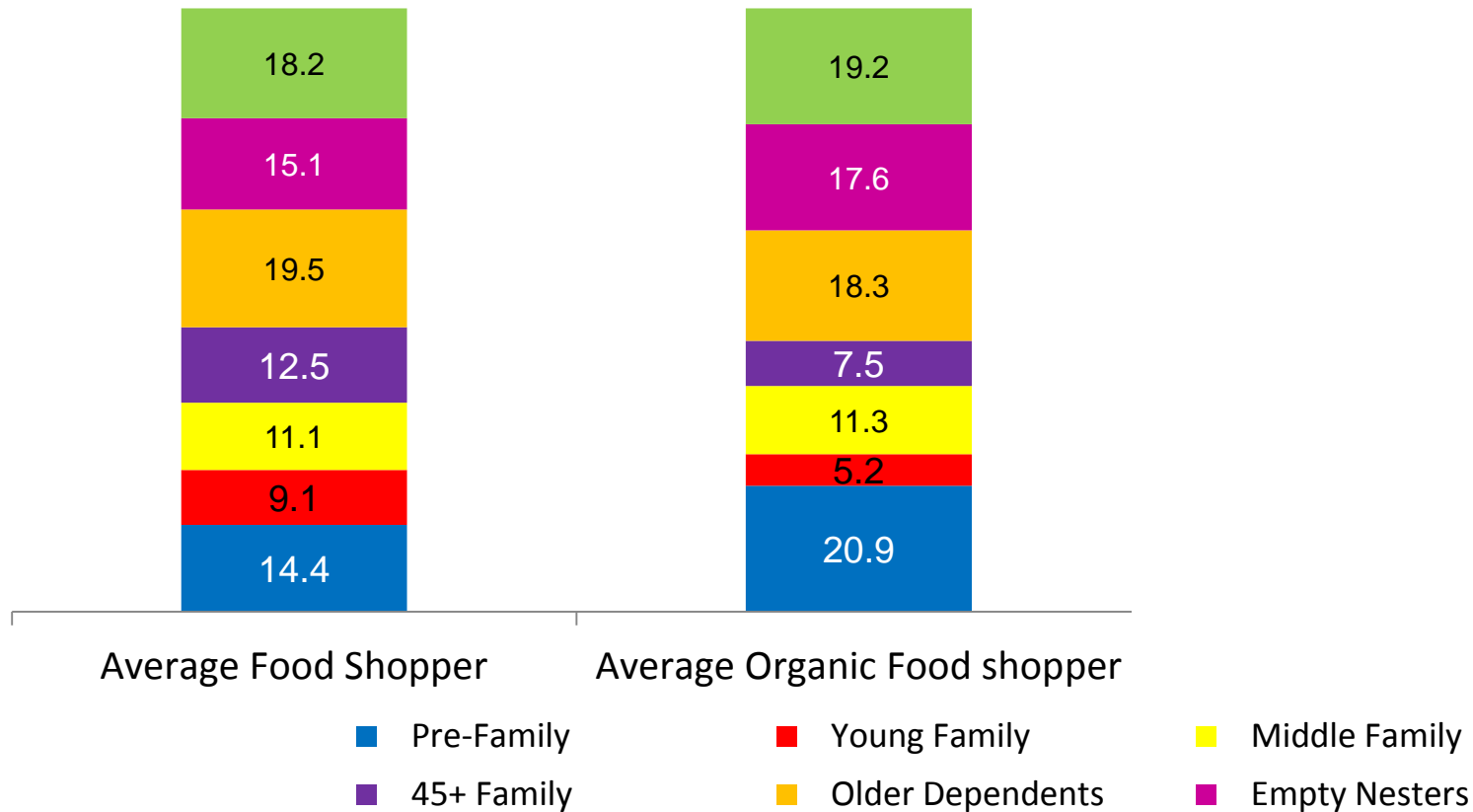


12w Organic Food– PL value%

# Who Buys Organic? ( spend)

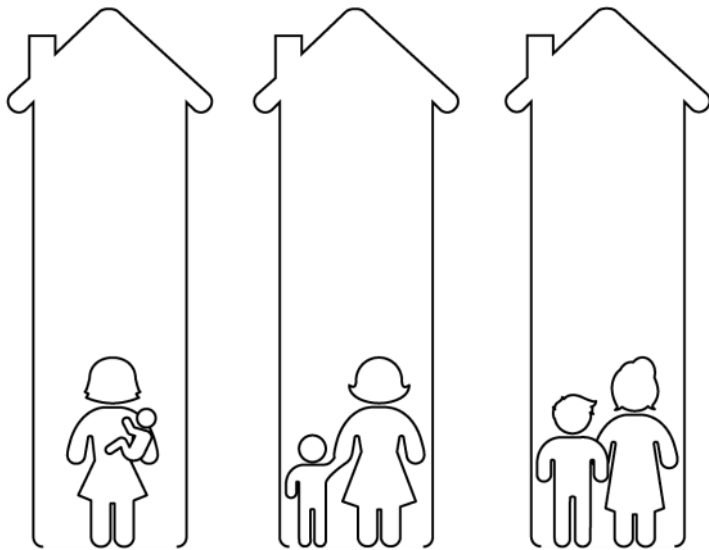


However almost 30% of spend from shoppers new to organic this year are also from a younger family group, a positive for growth of Organic food



% Spend

# Tapping into opportunities in families

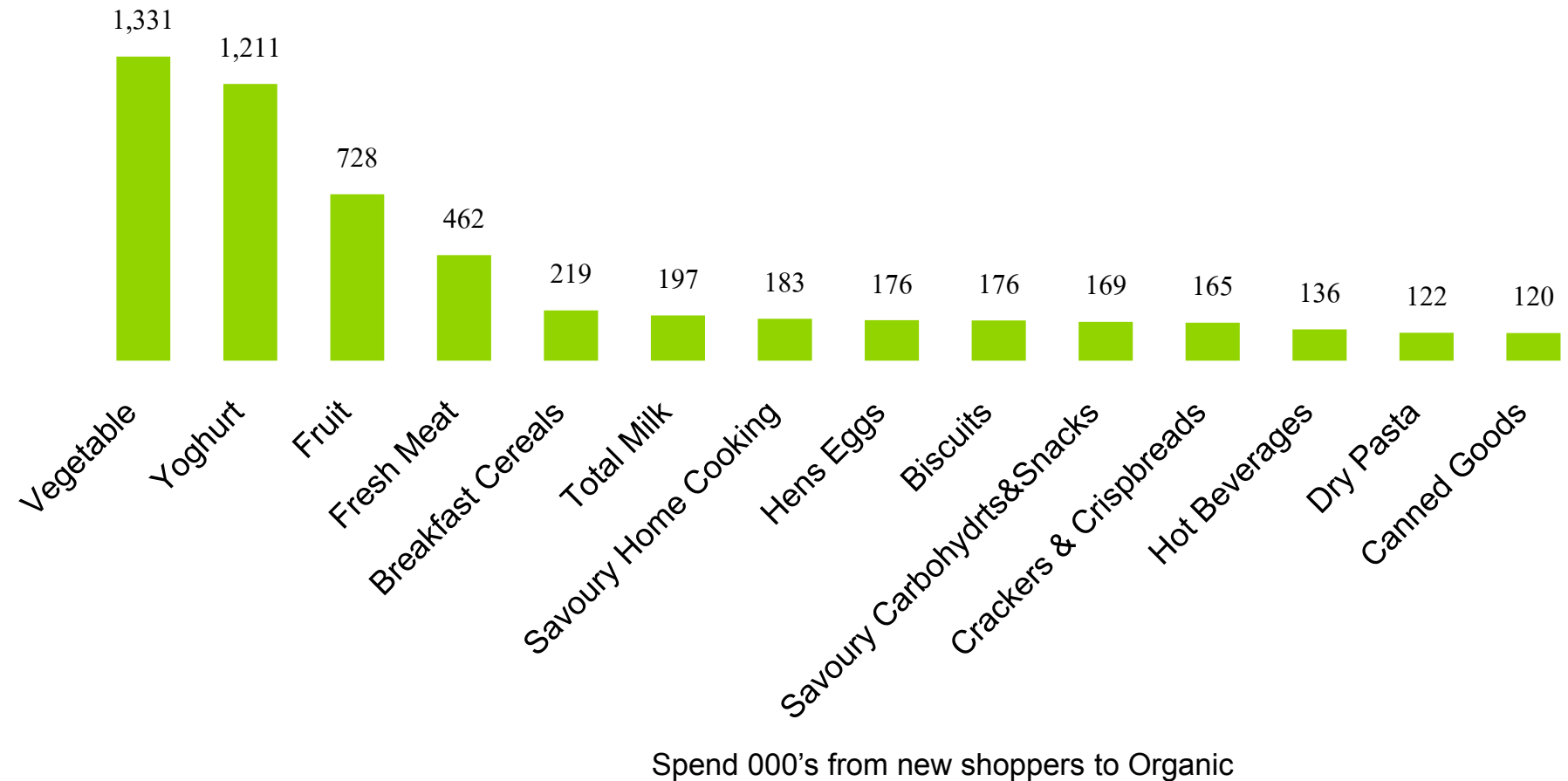


€1m



Growing 'Family'  
Organic Food by  
1ppt

Spend from new shoppers this year is mainly from Vegetable and Yoghurt so these are core products to have on shelf to attract shoppers to Organic









Think about Organic  
touch points on shelf  
& Highlight the benefits



# Organic occasions can drive up the overall value of the grocery trips for retailers

€22.50



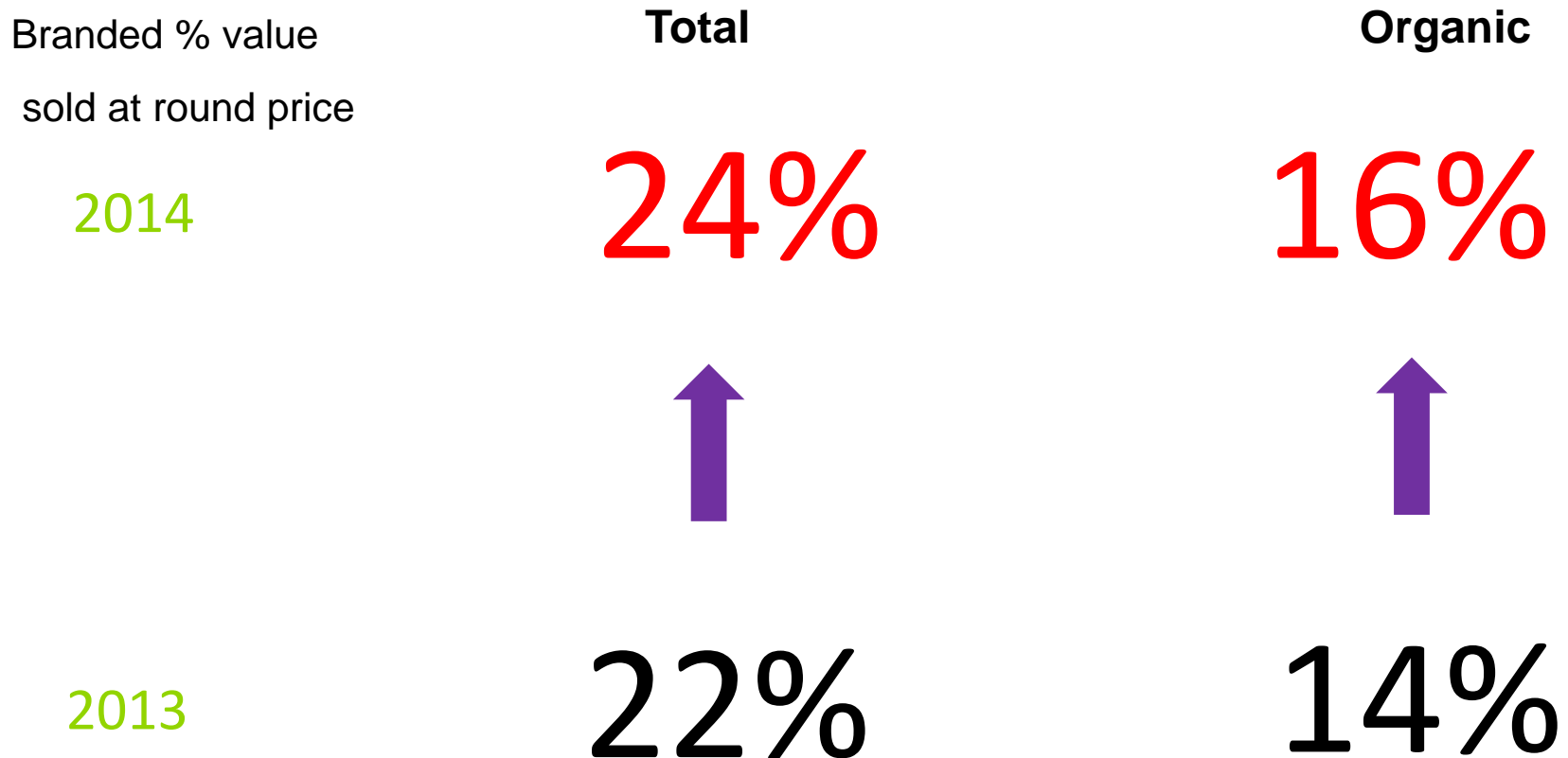
Average Spend per Grocery Occasion

€42.50

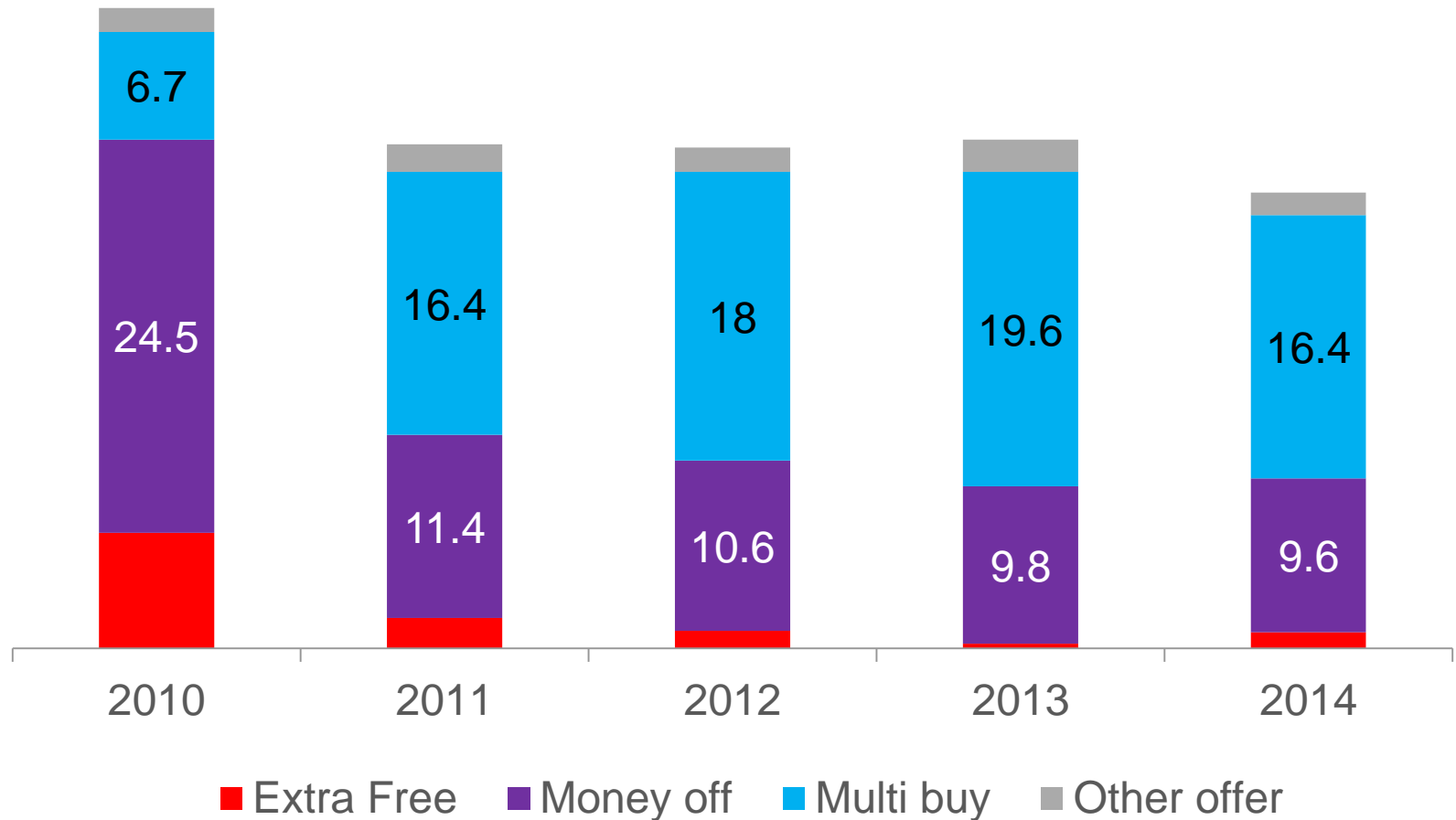


Average Spend when Organic products are included in the shopping trip

# Shoppers reacting to round prices, helping them to budget

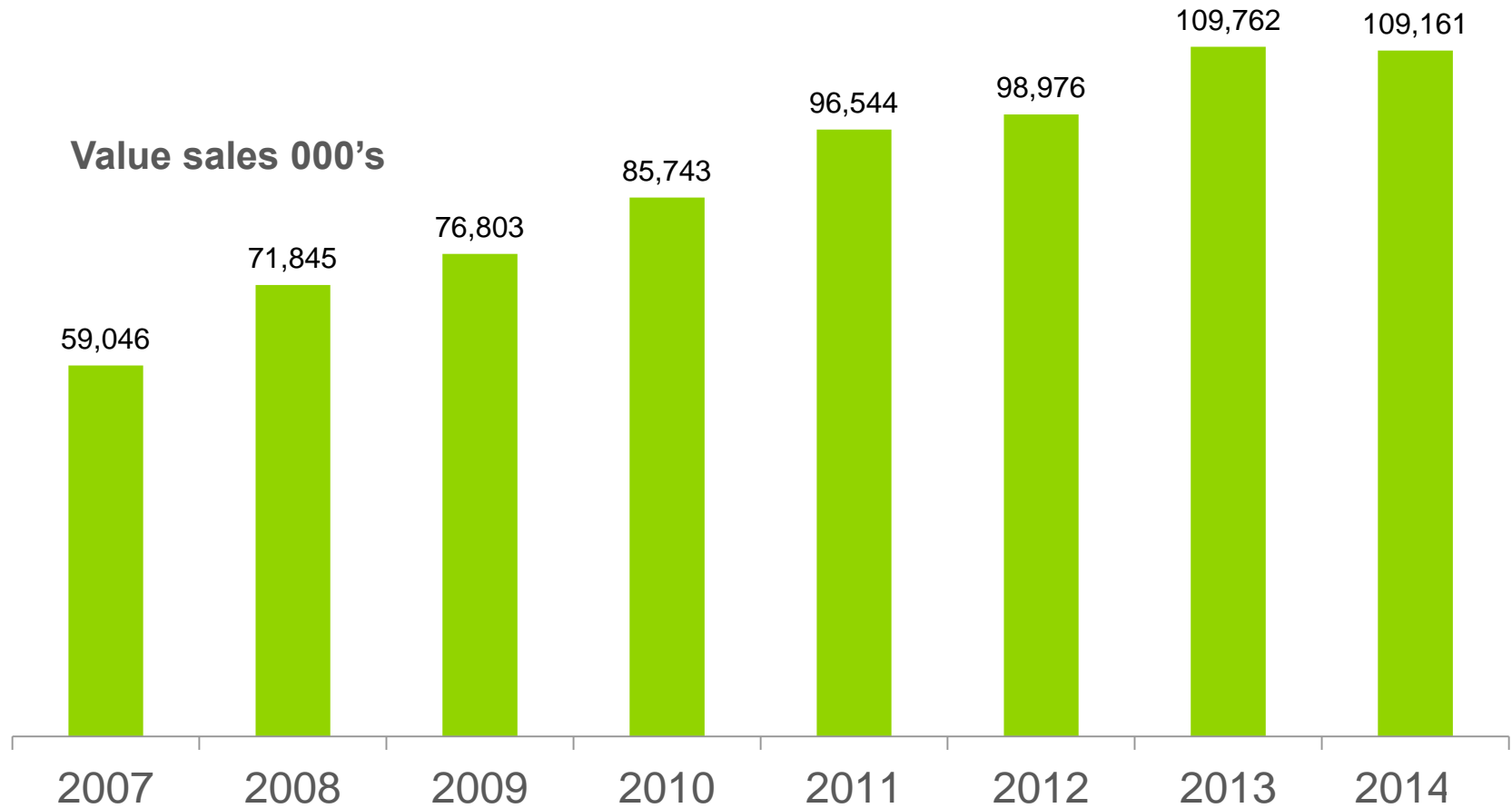


# Multi buy Promotions have helped encourage consumption in berries

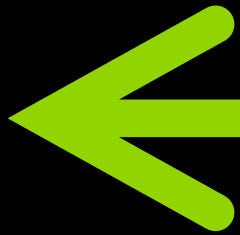


% Volume sold on deal - Berries

## Berries - Strong yearly growth for a consistent number of years







**Families are  
growing**

Are there ways we  
can expand our range  
to provide Organic  
Varieties catering to  
more shoppers  
needs?

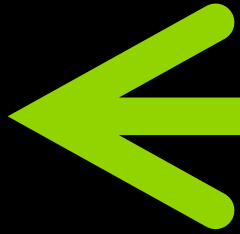
**Brands are  
strong but  
Private label  
provides  
another  
opportunity**

PL under trades in  
Organic, is it  
possible for us to  
link with Retailers  
in providing PL?

**Organics is  
growing but still  
small**

Need to encourage  
more shoppers to  
buy Organic through  
more in store activity





## **The Main Multiples are Key**

While we don't always associate Organic with the larger retailers, 75% of Organic spend goes through these channels

## **Organic shoppers are valuable shoppers**

Don't forget to remind retailers of how valuable these shoppers are, happy to pay a higher price leading to a higher overall grocery spend for retailers