

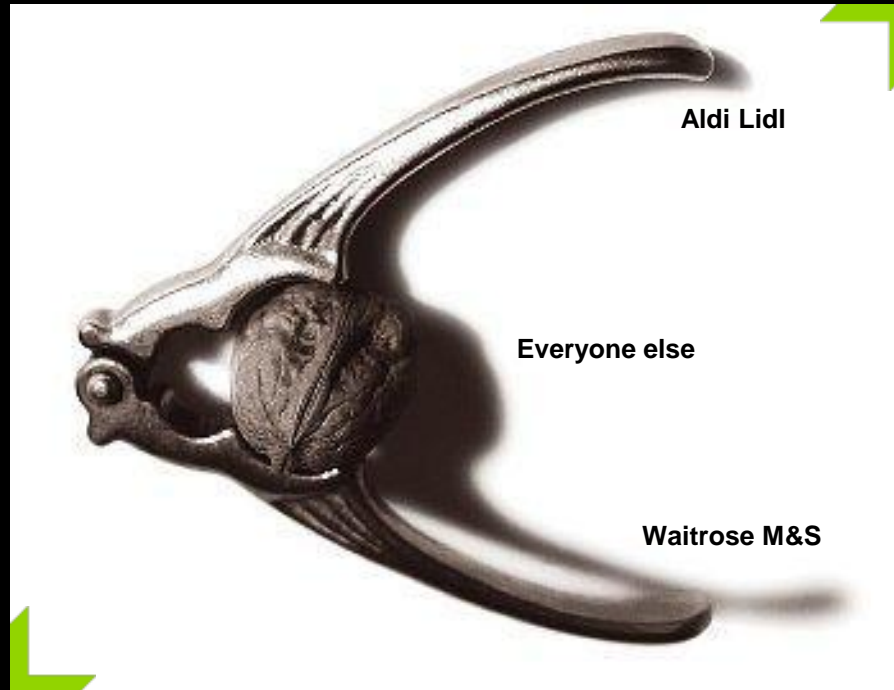
KANTAR WORLDpanel High definition inspiration



UK Retail & Consumer Outlook
Edward Garner - Communications Director



KANTAR WORLD PANEL High definition inspiration



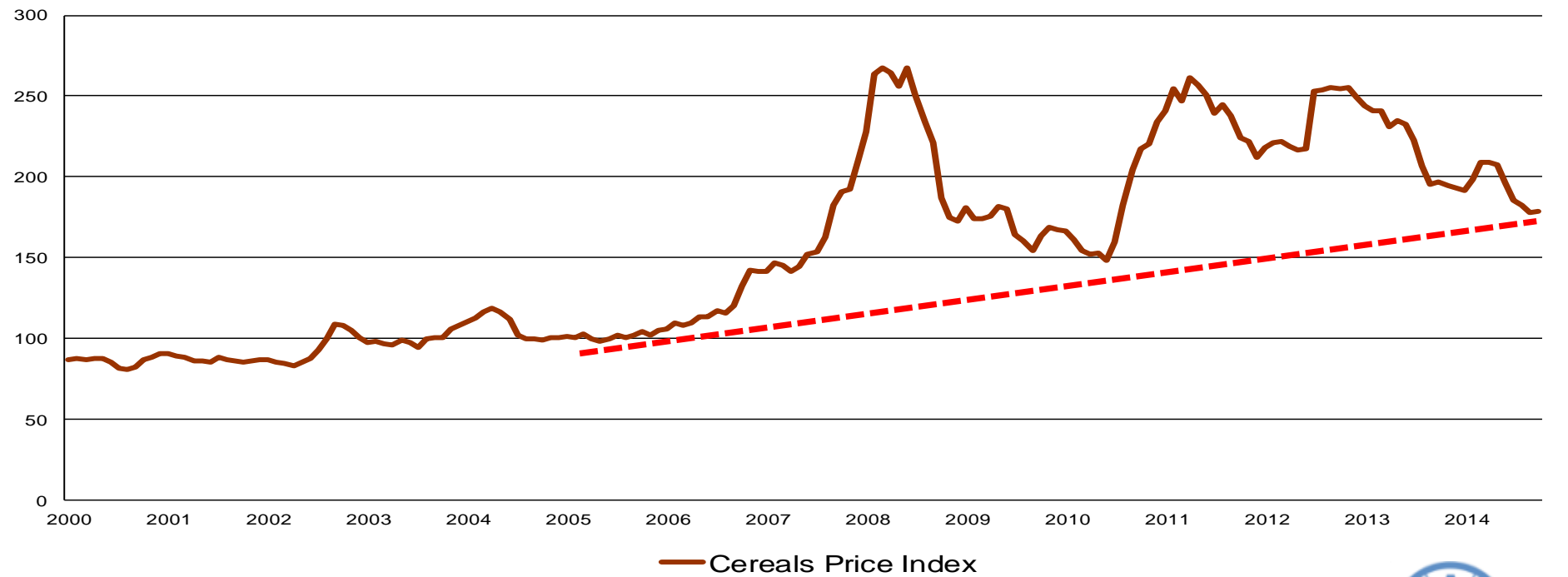
UK Retail & Consumer Outlook
Edward Garner - Communications Director

The Agenda

- – External pressures
 - The Squeeze
 - The Effect
 - Home Delivery
 - Seeking Differentiation
 - A role for Ethical Claims
 - Beef Insights



Global Food Price Indices



Food Price Index, UN FAO

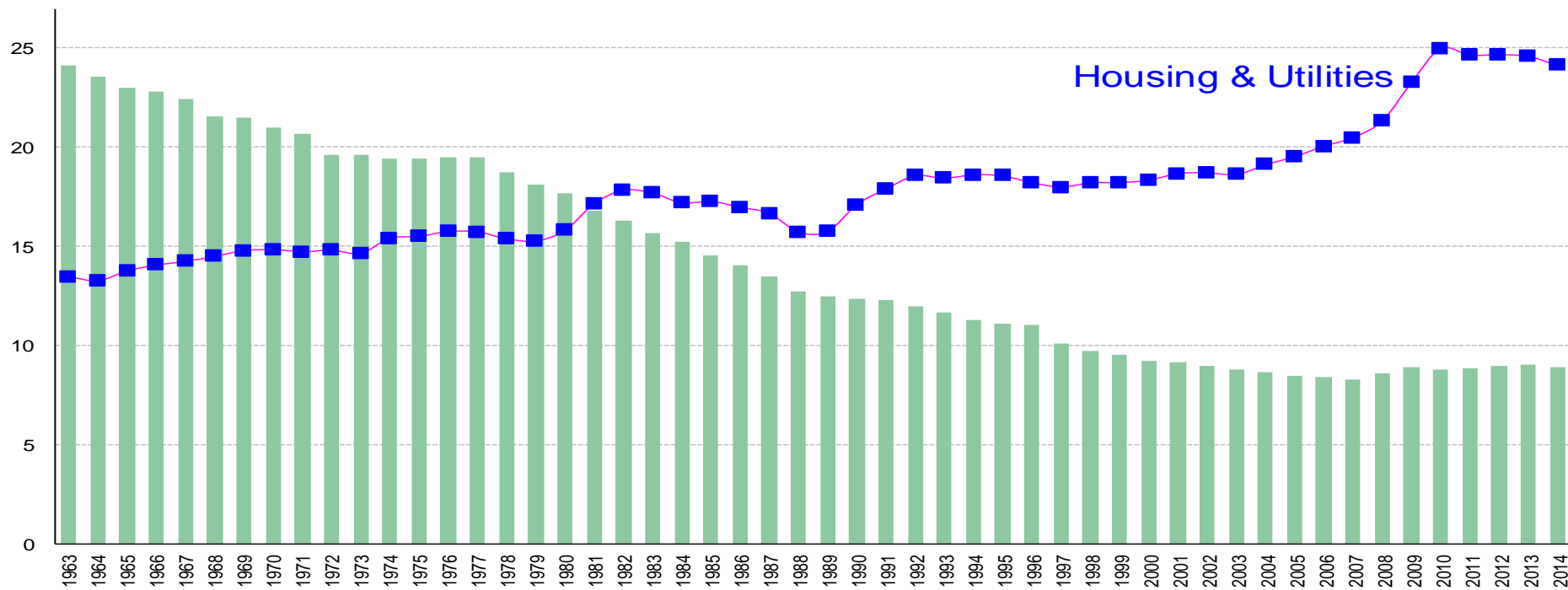


Food and Drink as a Proportion of UK Household Expenditure %



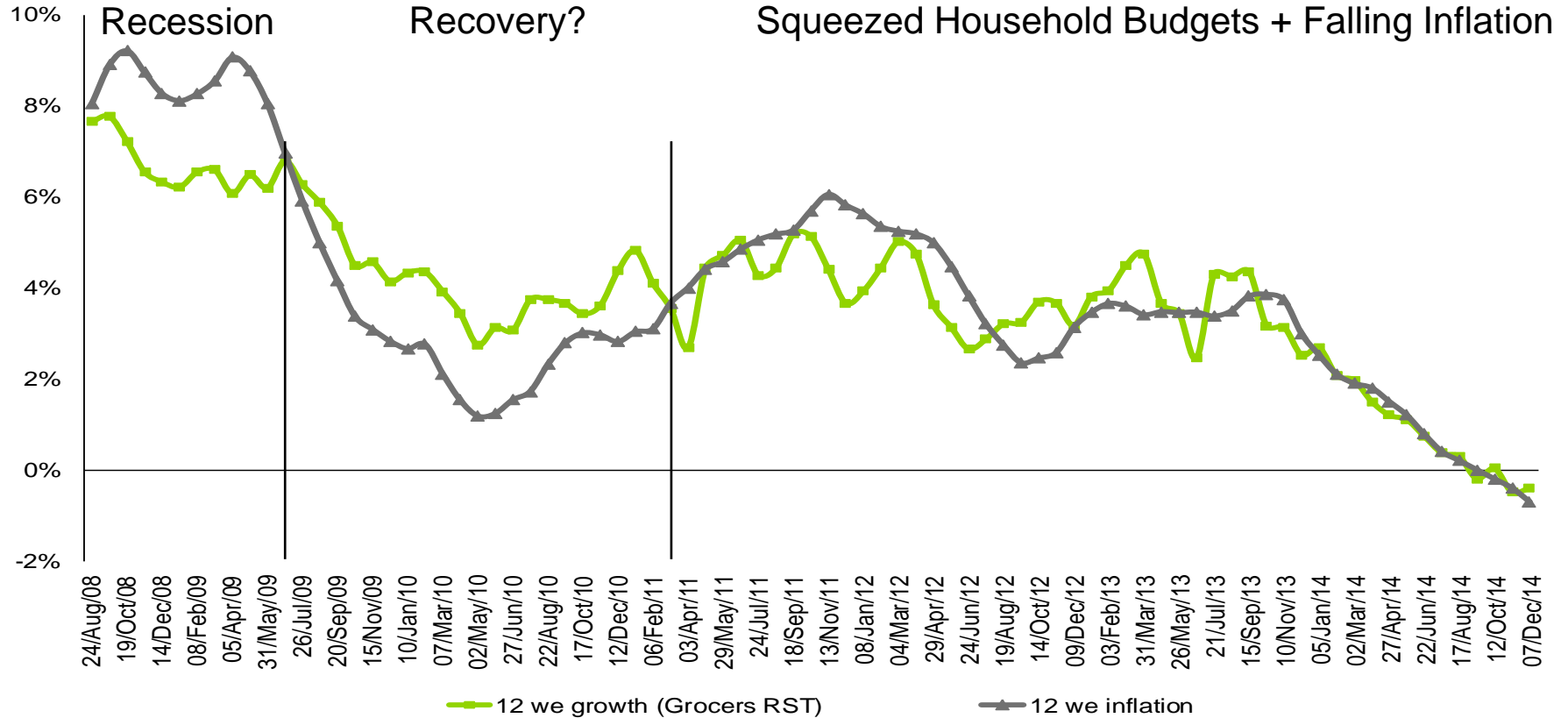
Source: ONS Series ABQI / ABZV

Food and Drink as a Proportion of UK Household Expenditure %

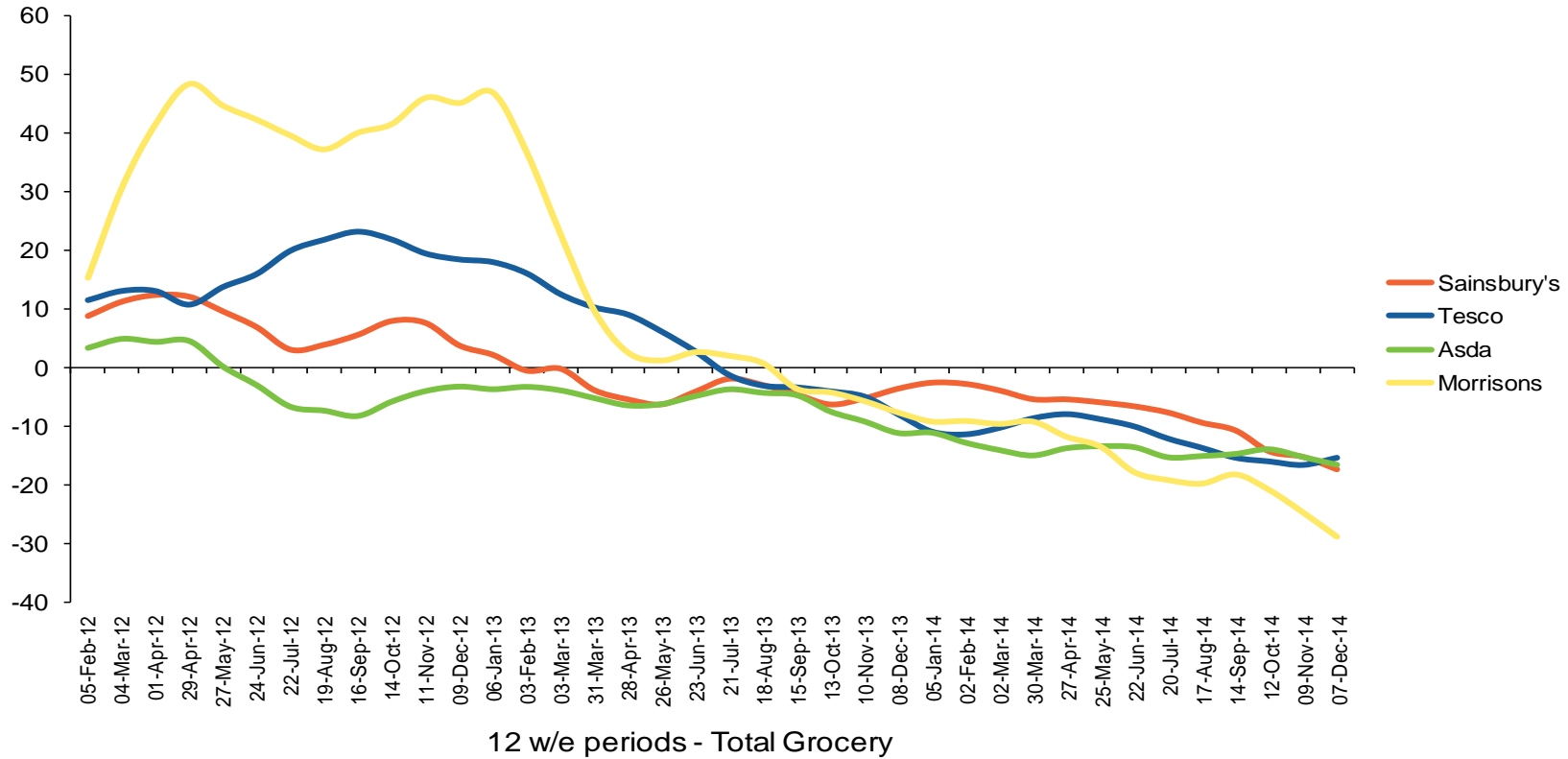


Source: ONS Series ABQI / ABZV

Grocery Market Growth v. Inflation



Value Own-Label Year-on-Year £% Changes - Big 4

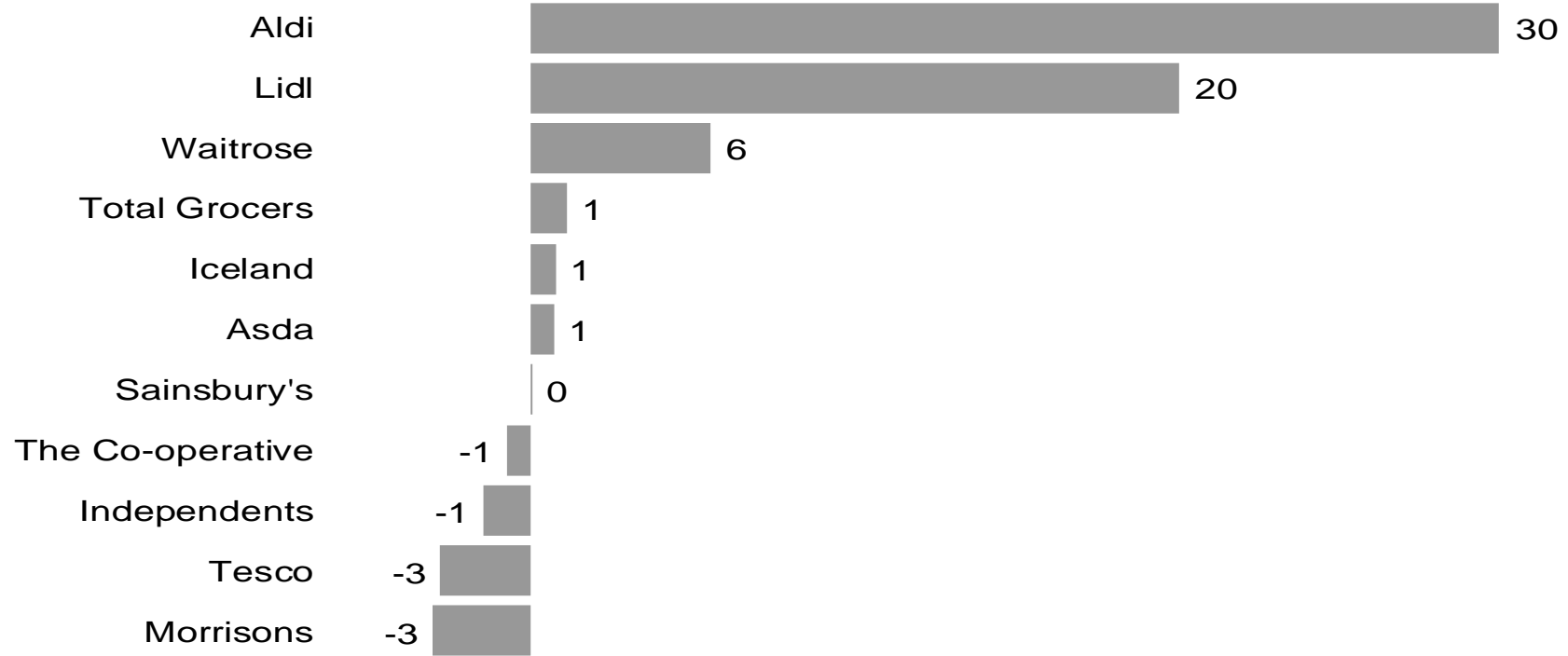


The Agenda

- External pressures
- > – The Squeeze
- The Effect
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- Beef Insights

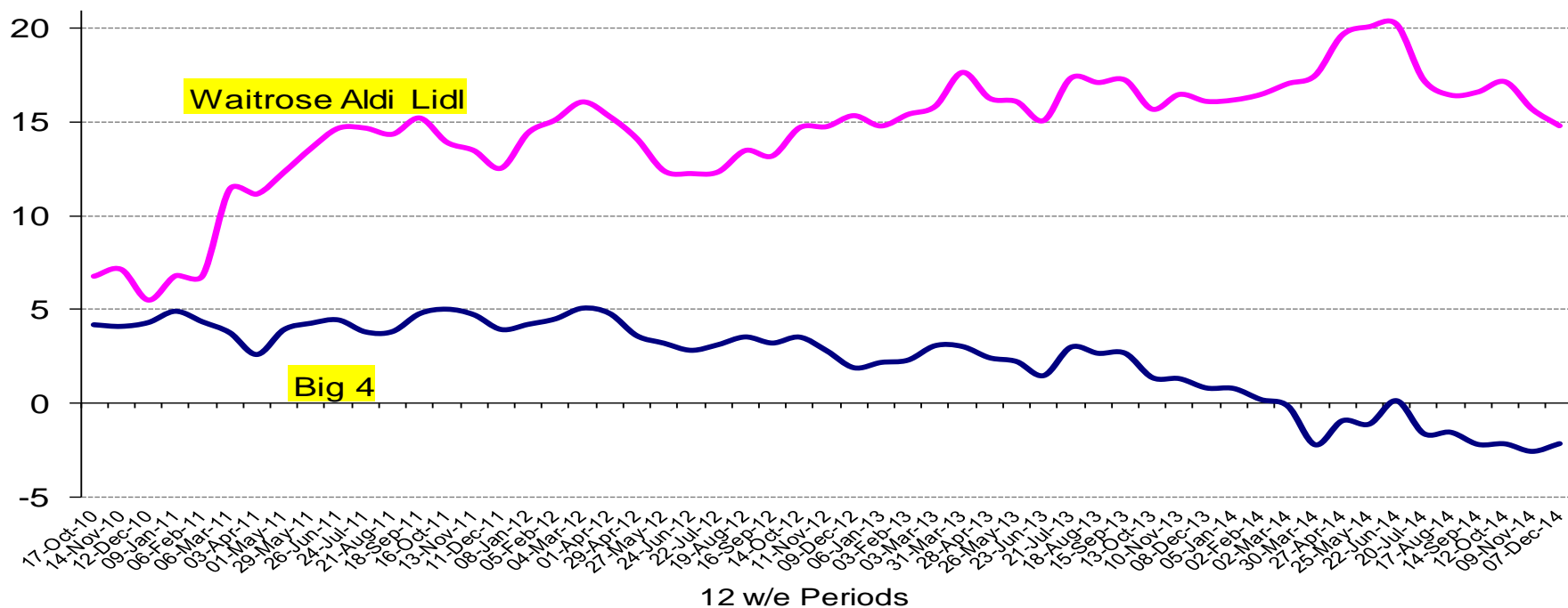


Annual Till Roll Totals Expenditure Trends



52 w/e Dec 07 2014 y/y % Change

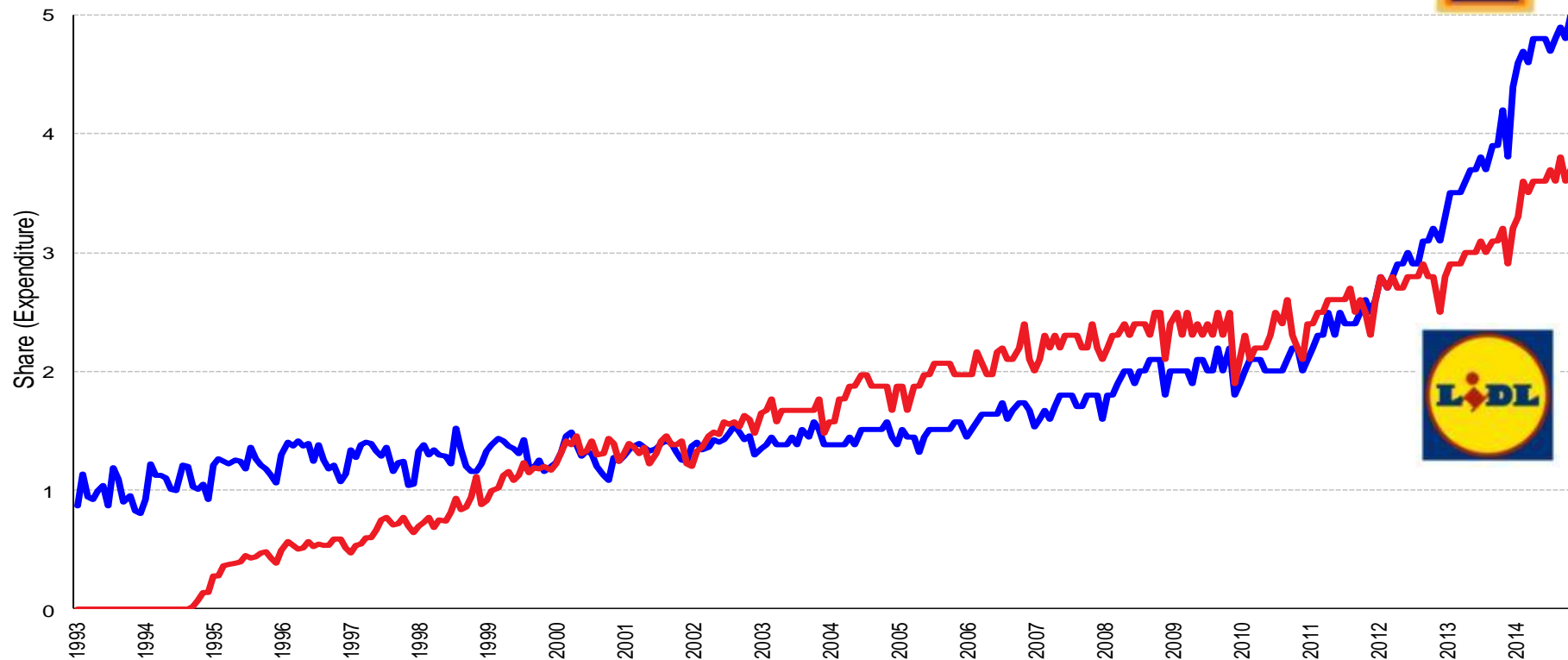
Till Roll Annual Growth Rates



Discounters



Long-Term Share of Till Roll Grocers





[Specialbuys](#) [Product Range](#) [Recipes](#) [Customer Service](#) [About Aldi](#)

You are here: [Homepage](#) → [About Aldi](#) → [TV Campaigns](#) → Aldi Challenge

[New Stores](#) [Aldi Hints & Tips](#) [Useful Information](#) [Social Centre](#) [Mobile Apps](#) [Photo Service](#) [Like Aldi](#) [TV Campaigns](#) [Games](#)

TV Adverts

Aldi Challenge



There's January. Dull, watching every penny after Christmas, not having fun January. And there's Aldi January! Doing more, tasting more, living more, (and having a bit more to enjoy it with) January. It's like having January in colour rather than Black and White. So swap your old January to an Aldi January. Take the challenge by clicking here now or using the hashtag #AldiChallenge to join the conversation.

Swap your old January to an Aldi January.



AWARDS & ENDORSEMENTS

Award winning Aldi quality

We're famous for the quality and value of our products - and from the number of awards we win, it seems the experts agree! We've scooped the prestigious Grocer of the Year 2013 Award, won a total of 15 gold award wins at the Grocer Own Label Awards, more than any other retailer and 15 awards at the International Wine and Spirit competition to name just a few. On top of all of this, we are the first ever retailer to win Which? Best Supermarket 2013 at the Which? Awards for two years running.

In fact, we've won awards for almost anything you can think of including frozen foods, cheese, yogurts and bread... Clearly, our insistence on quality and value is widely appreciated, not just by the experts but also by our customers.



Prima Baby Reader Awards 2014



Retailer of the Year 2014



Which? Supermarket Satisfaction Survey 2014



What Food, What Wine Awards 2013



Which? Best Supermarket 2013



The Grocer Supermarket Loyalty League 2012/13



Grocer of the Year 2013



Grocer Own Label 2013



International Wine Challenge 2013



International Wine & Spirits Competition 2012



Decanter Awards 2012



The Spirits Business Masters Awards 2013



International Spirits Challenge 2013



Loved by parents Awards 2013



Mother & Baby Awards 2013



British Frozen Food Federation 2013



Great Taste Awards 2012



Which? Best Buy Awards



Good Housekeeping Institute



Quality Food Awards 2013



Quality Drinks Awards 2013



World Cheese Awards 2013

ON SALE
SUN 30 NOV

Once they're gone, they're gone!

Made for Christmas morning...

Our cosy loungewear is perfect for relaxing in over the festive season or giving as gifts... it is Christmas after all.

Men's Pyjamas

Cosy up at bedtime and lounge in comfort in our great value pyjamas. Sizes M-XL.

£8.99
each



Men's Dressing Gown

Relax in comfort with this soft-touch fleece dressing gown with shawl collar, 2 front pockets and waist belt. Sizes S/M or L/XL.

£9.99
each

100% cotton



Men's Character Slippers

Choose from The Slig, Family Guy, The Simpsons or Superman. Sizes 7-12.

£5.99
per pair



Superhero slippers for your superheroes - perfect!

Adults' Character Socks

Socks that will make great stocking fillers. Choose from Family Guy, The Simpsons, Batman, Minnie Mouse, Betty Boop or Snoopy. Men's 6-11. Ladies' 4-7.

£2.59
2 pack



Radio Controlled Digital Alarm Clock

Wake up on time with this Radio Controlled Digital Alarm Clock.

• Automatic time set • Separate alarm for working days and weekend • Blue backlight • Available in White, Red, Blue or Black

£4.99
each



Speaker Pillow

Relax and listen to music without uncomfortable earphones while you sleep.

• Built-in speaker

• Detachable cable when not in use

• Quilted finish for comfort and support

• Soft touch microfibre cover



All devices with headphones port

Slumberdown

Specially Selected Honey Gift Pack

A gift pack of 3 single origin honeys, including Brazilian Eucalyptus, Thai Sunflower and Mexican Yucatan.

£1.24 per 100g



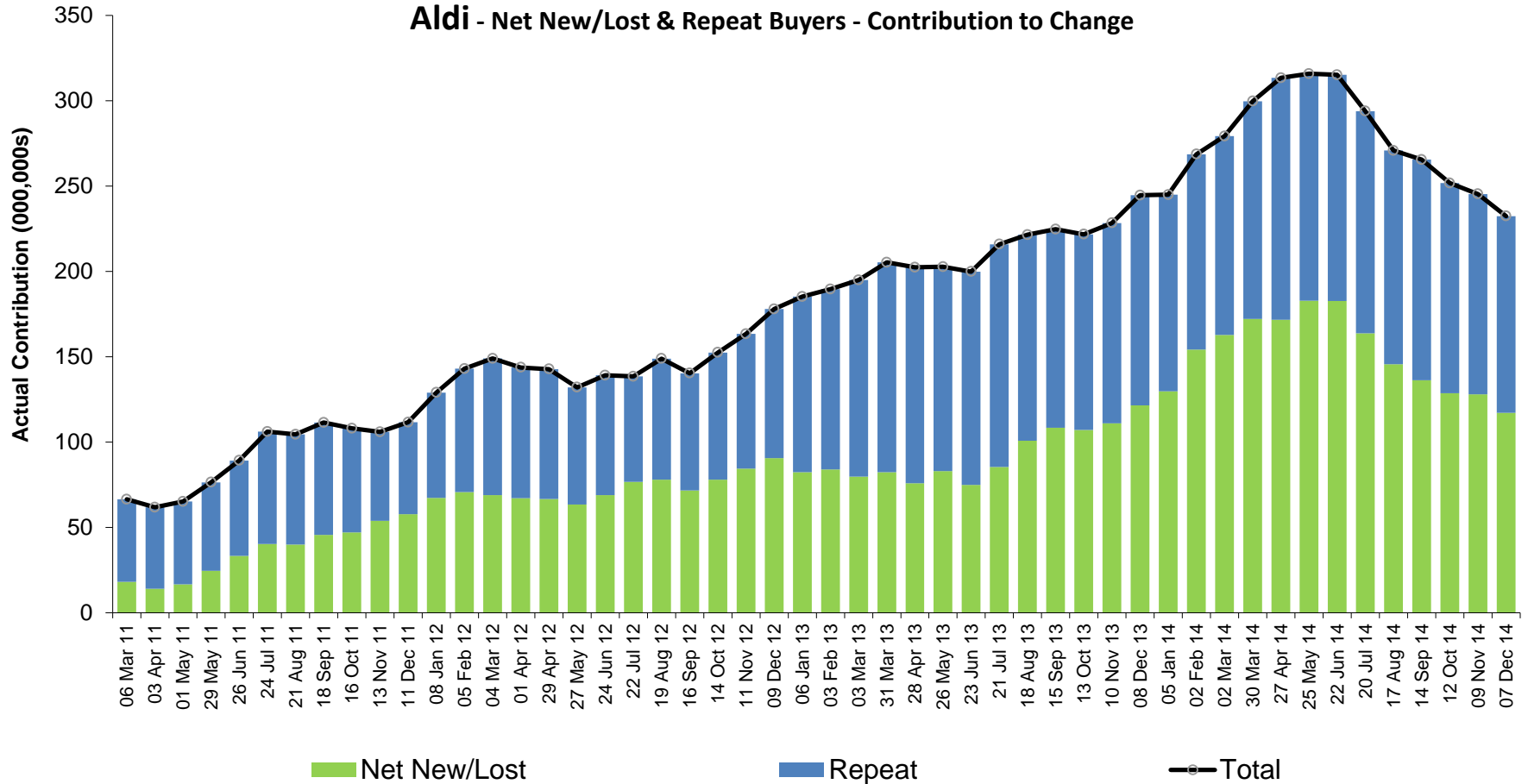
Get the latest Aldi Specialbuys on your phone with our free app

aldi.co.uk

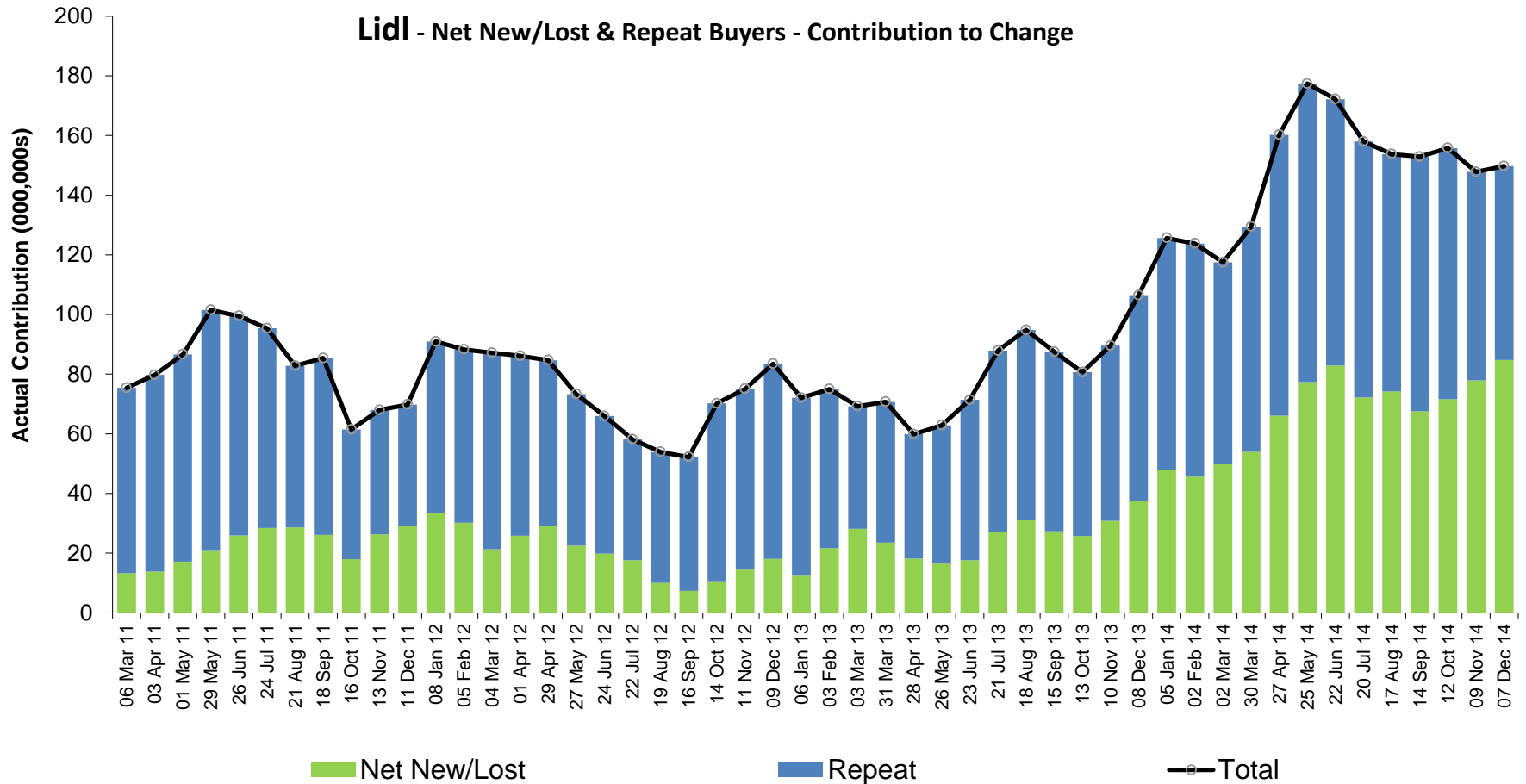


Products shown are only available pre-packaged in store.
Deli counter not available in store. Subject to availability. Products may vary in N.I.

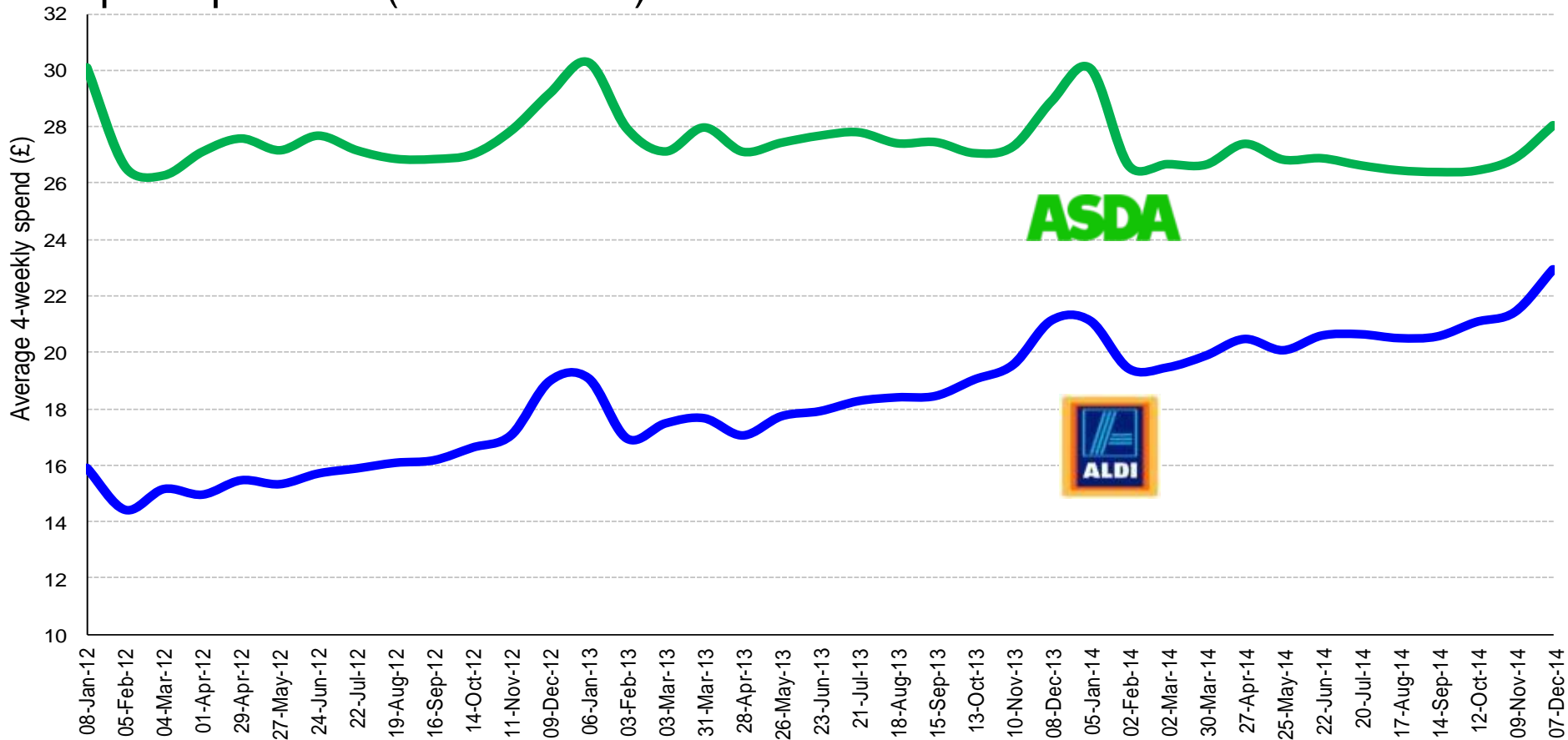
Aldi - Net New/Lost & Repeat Buyers - Contribution to Change



Lidl - Net New/Lost & Repeat Buyers - Contribution to Change



Spend per Visit (Basket Size) Trends

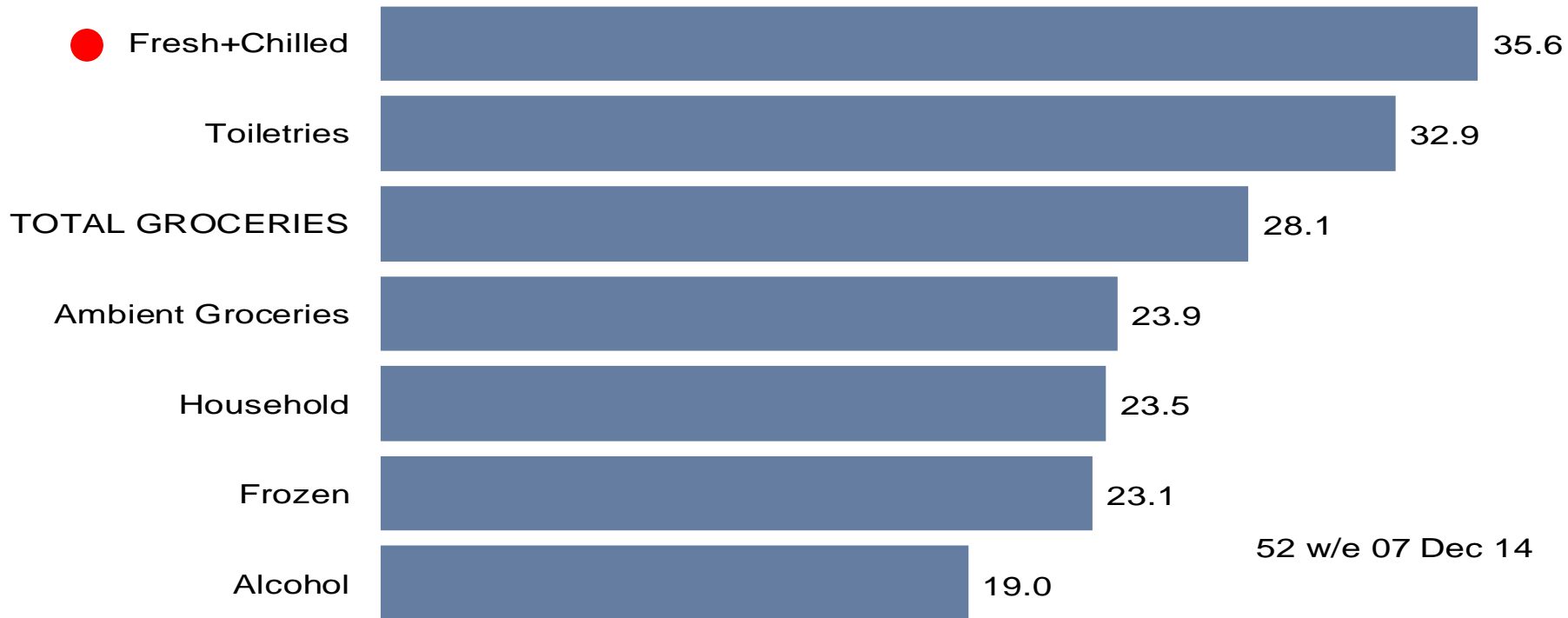


Frozen Poultry+Game	238
Frozen Fish	150
Packet Breakfast	128
● Fruit+Veg+Salads	127
Fresh Poultry+Game	124
Biscuits	121
Fresh Meat	117
Canned Goods	111
Sweet Home Cooking	109
Ambient Bakery Products	107
Take Home Savouries	107
Frozen Confectionery	105

● Fruit+Veg+Salads	143
● Fresh Poultry+Game	137
● Fresh Meat	133
Sweet Home Cooking	130
Frozen Fish	125
Frozen Confectionery	124
Frozen Poultry+Game	124
Canned Goods	116
Pickle+Tbl Sce+Condiment	114
Frozen Meat	113
Packet Breakfast	111
Fresh Fish	106

Year-on-Year Expenditure Trends - % change

Aldi



52 w/e 07 Dec 14

Year-on-Year Expenditure Trends - & change

Lidl



Fresh+Chilled

29.6

TOTAL GROCERIES

20.2

Alcohol

16.0

Frozen

14.7

Ambient Groceries

12.6

Household

9.7

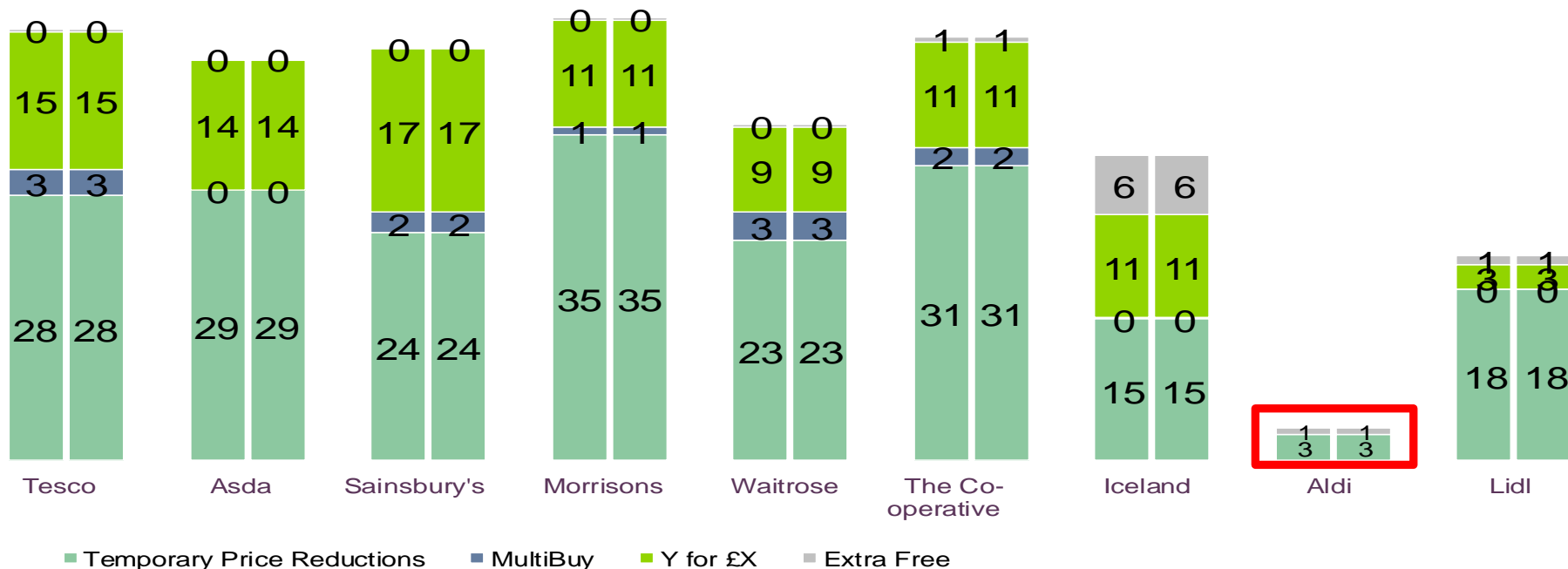
Toiletries

8.2

52 w/e 07 Dec 14

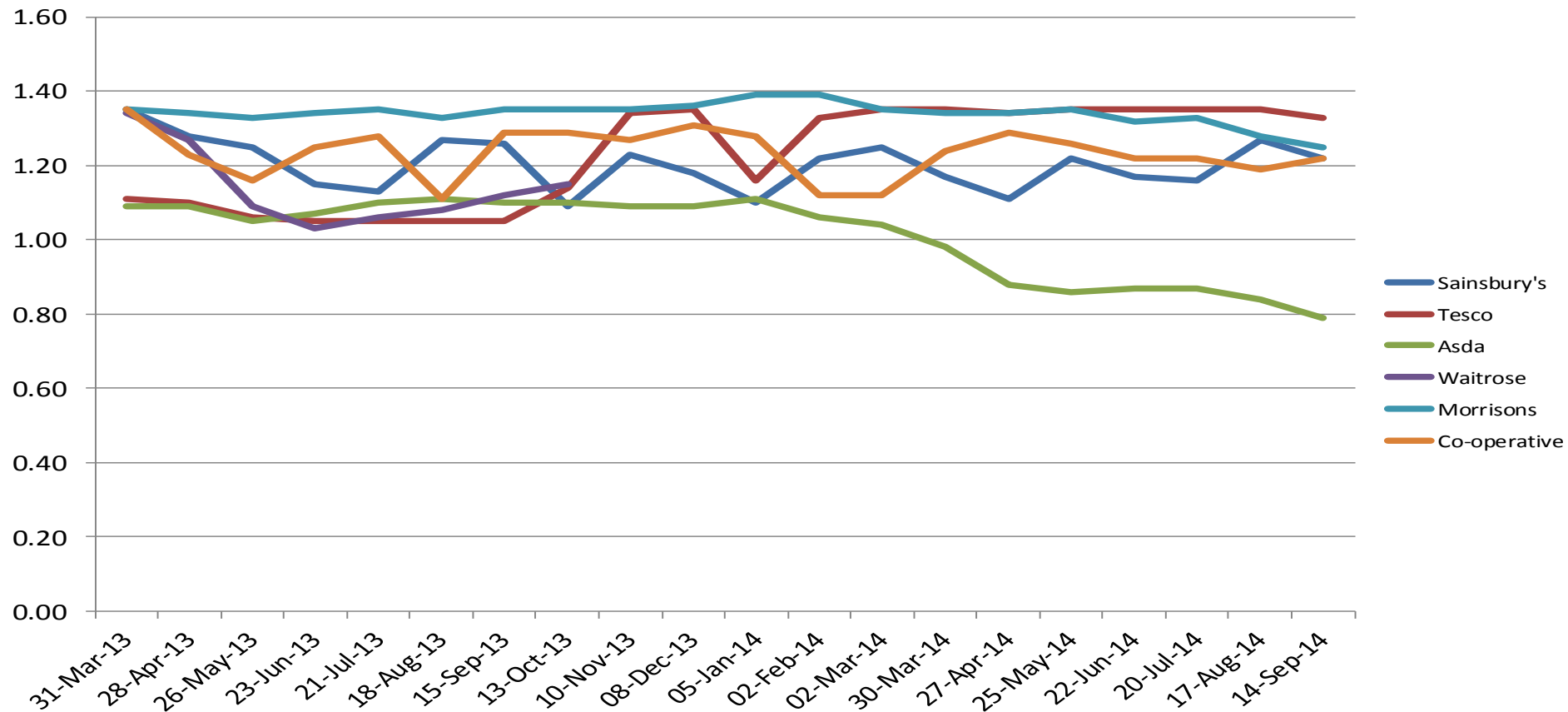
The Importance of Promotions by Retailer

% Outlet Turnover by Promotional Type

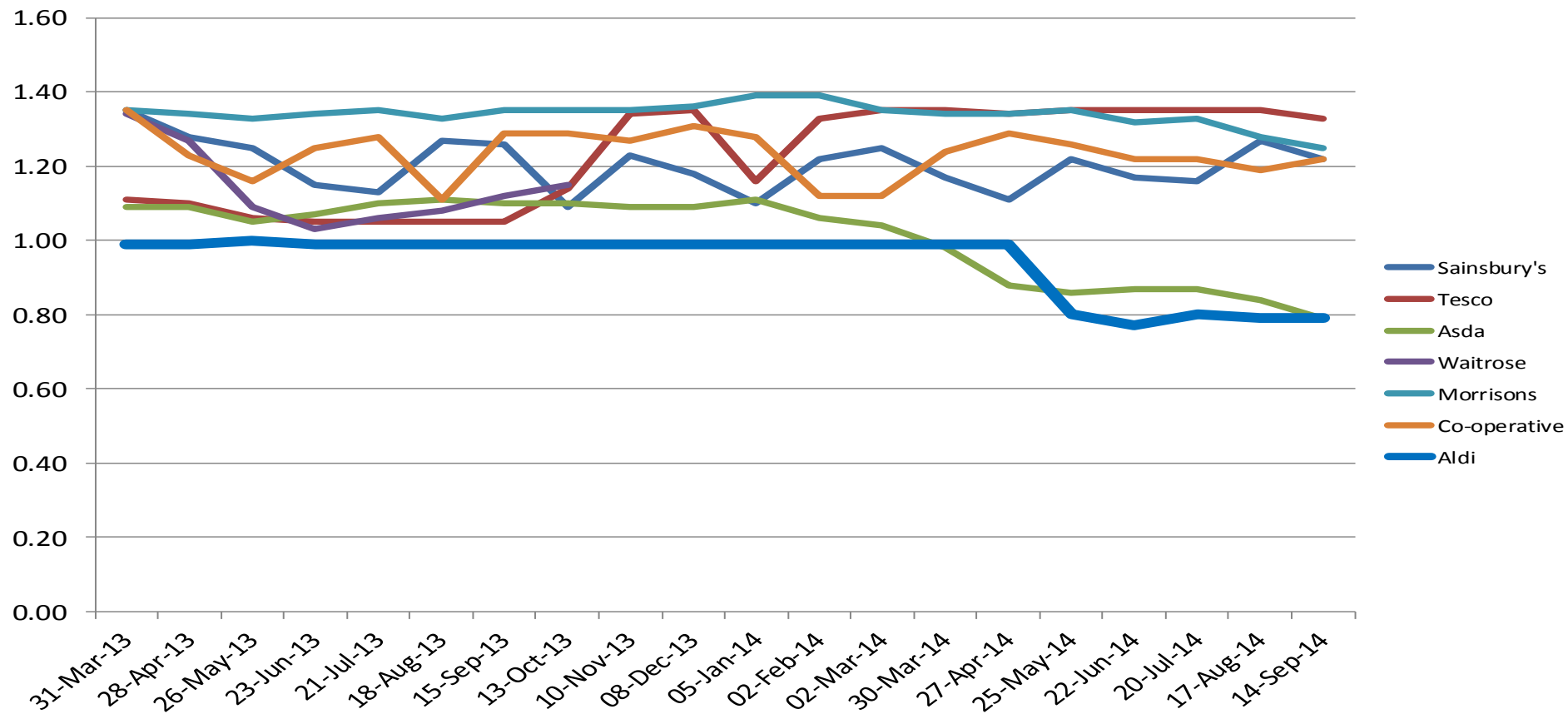


52 w/e Dec 08 2013 v. 52 w/e Dec 07 2014

Kingsmill Great Everyday 800gm Price/pack



Kingsmill Great Everyday 800gm Price/pack

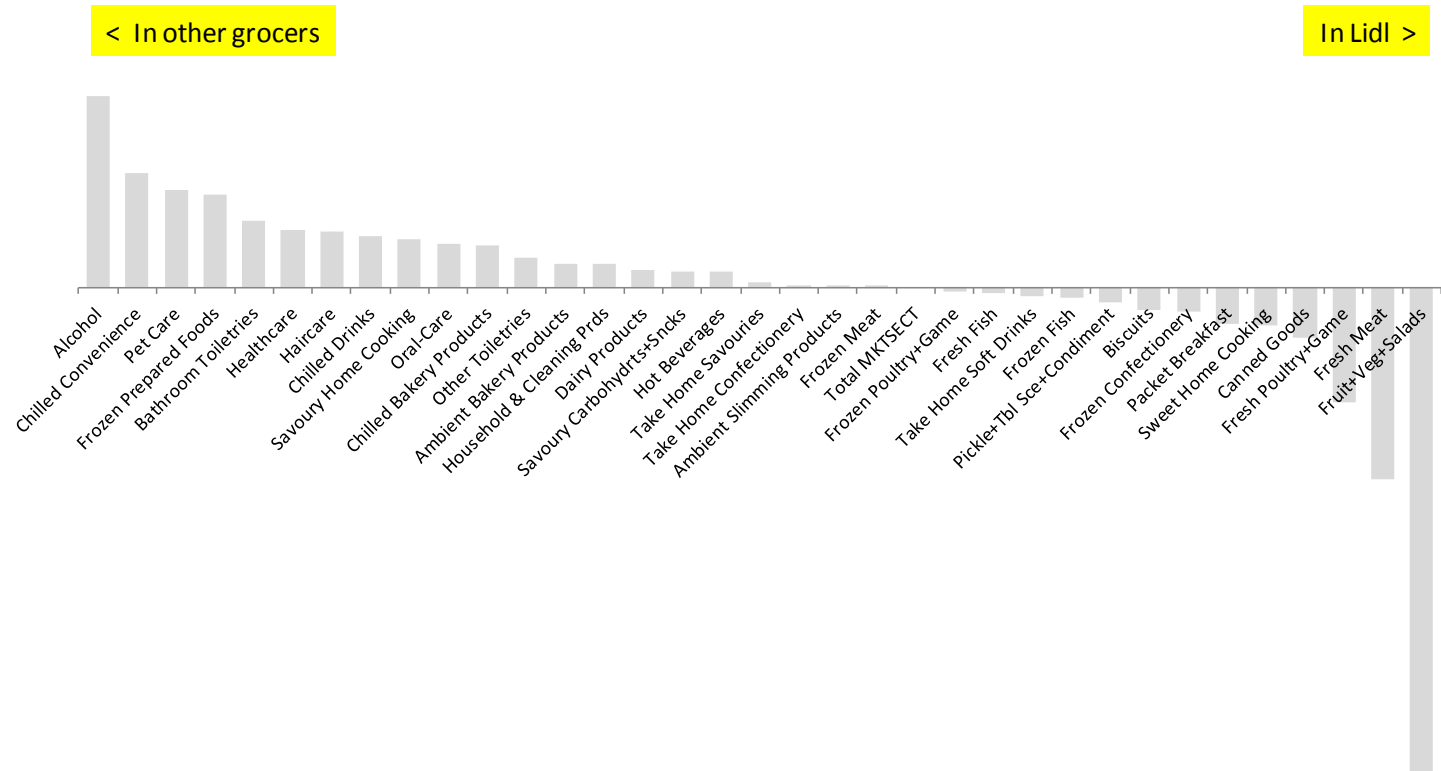


**We did #BlackFriday last week.
We called it 'Friday'.**

#EverydayLowPrices



Where Lidl shoppers prefer to shop

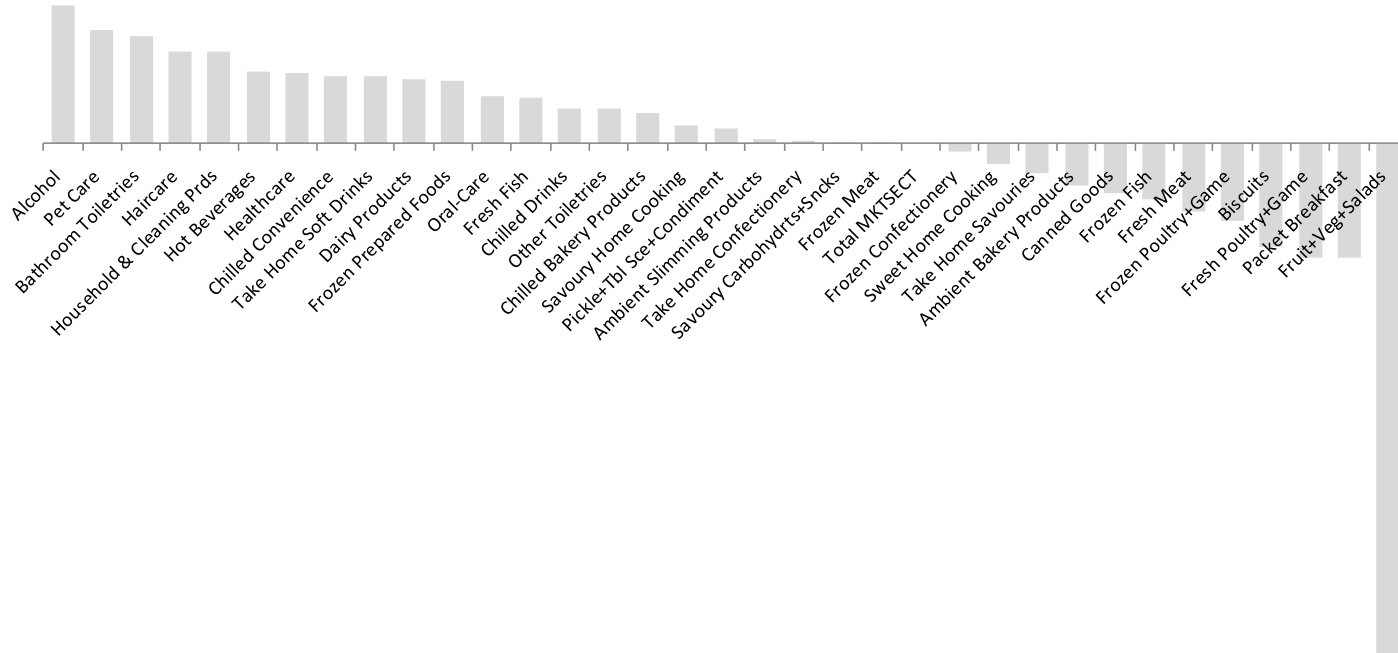


52 w/e Nov 09 2014

Where Aldi shoppers prefer to shop

< In other grocers

In Aldi >



52 w/e Nov 09 2014

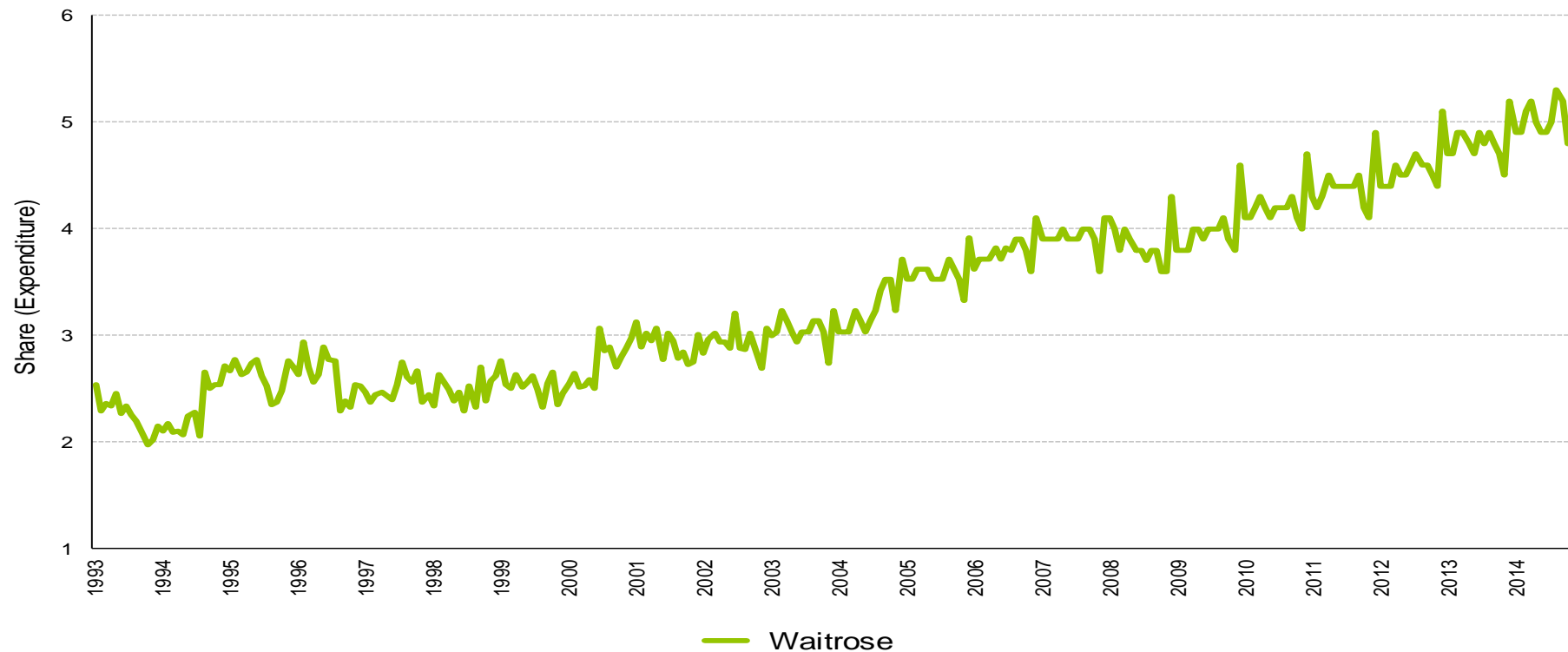
Waitrose



KANTAR W^{ORLD}PANEL High definition inspiration

Long-Term Share of Till Roll Grocers

Waitrose



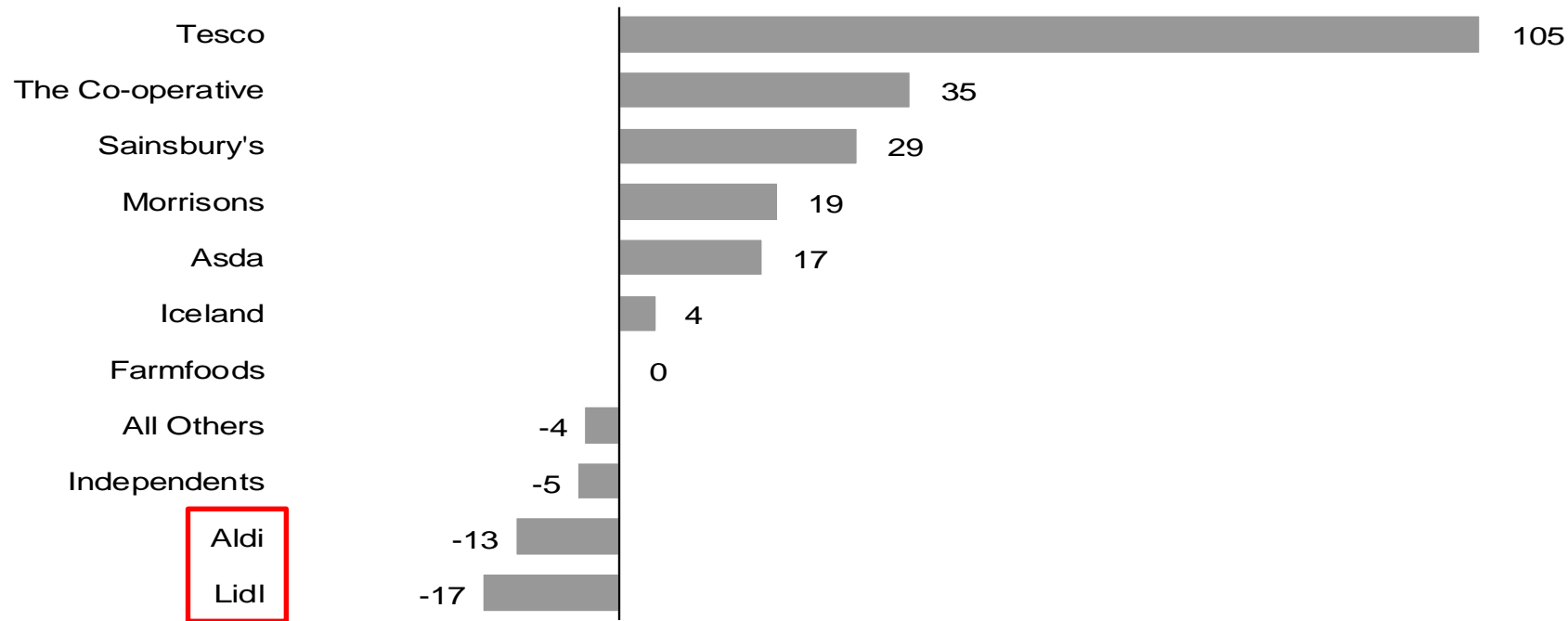
Waitrose Share Index

I am prepared to pay more for organic food	222
I actively seek out fair trade products	197
I try to buy environmentally friendly products	158
I try to buy local product whenever I can	136

Price is the most important Factor	63
------------------------------------	----

Till Roll Share indexed on All Shoppers – 52 w/e May 25 2014

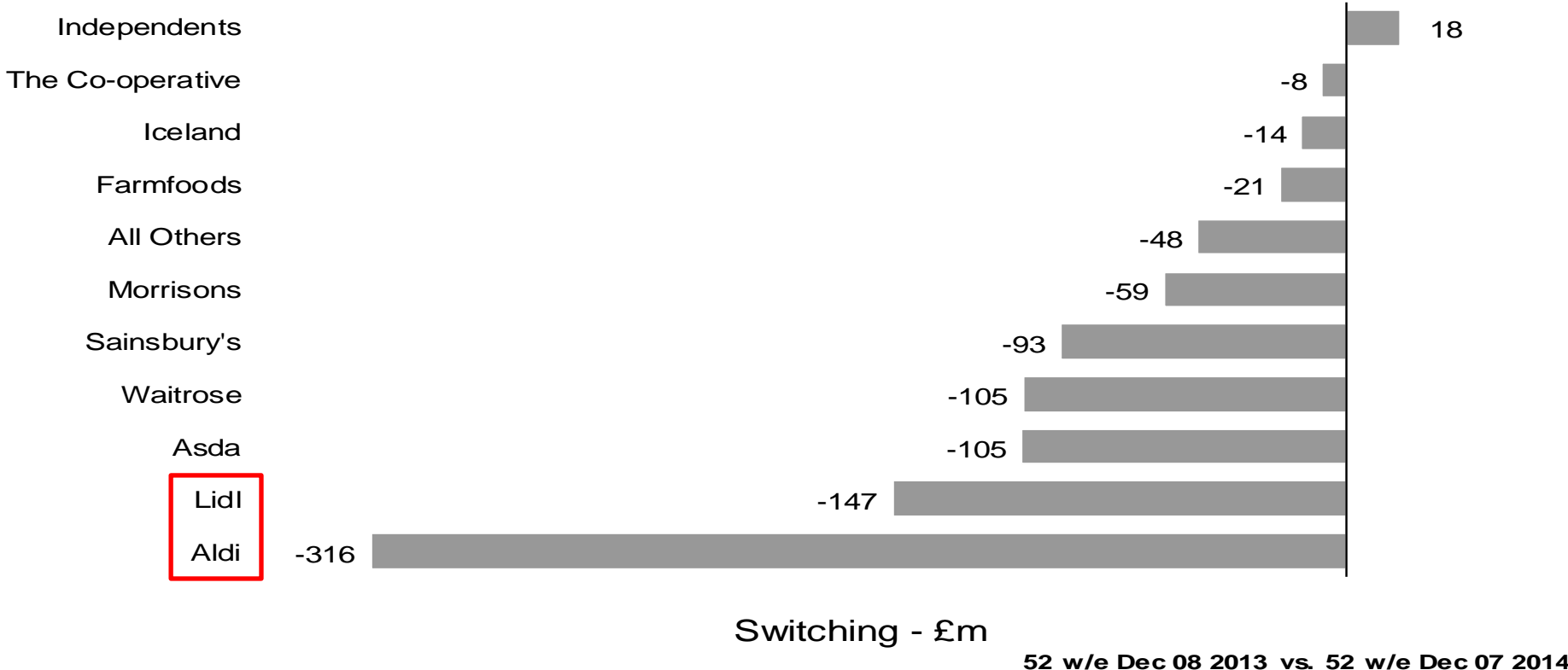
Till Roll - Net Switching Volumes - Waitrose



Switching - £m

52 w/e Dec 08 2013 vs. 52 w/e Dec 07 2014

Till Roll - Net Switching Volumes - Tesco

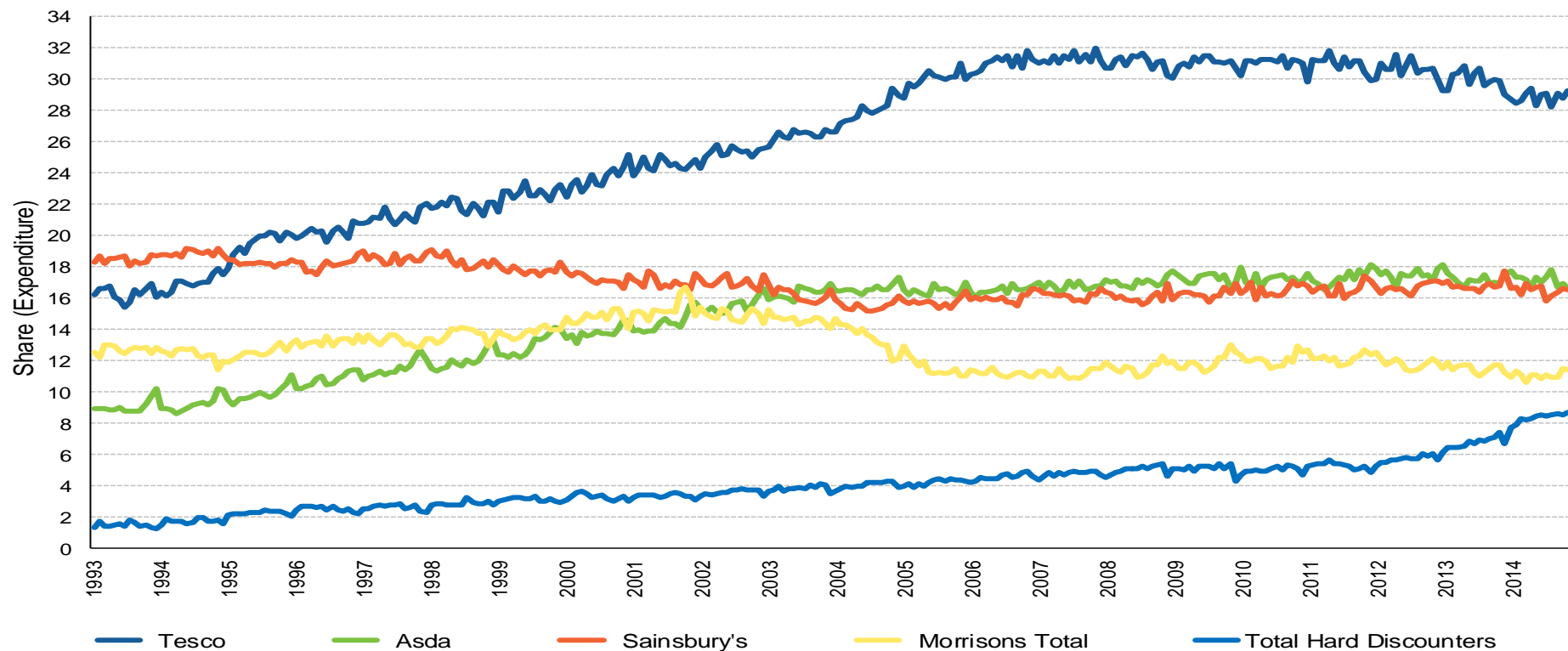


The Agenda

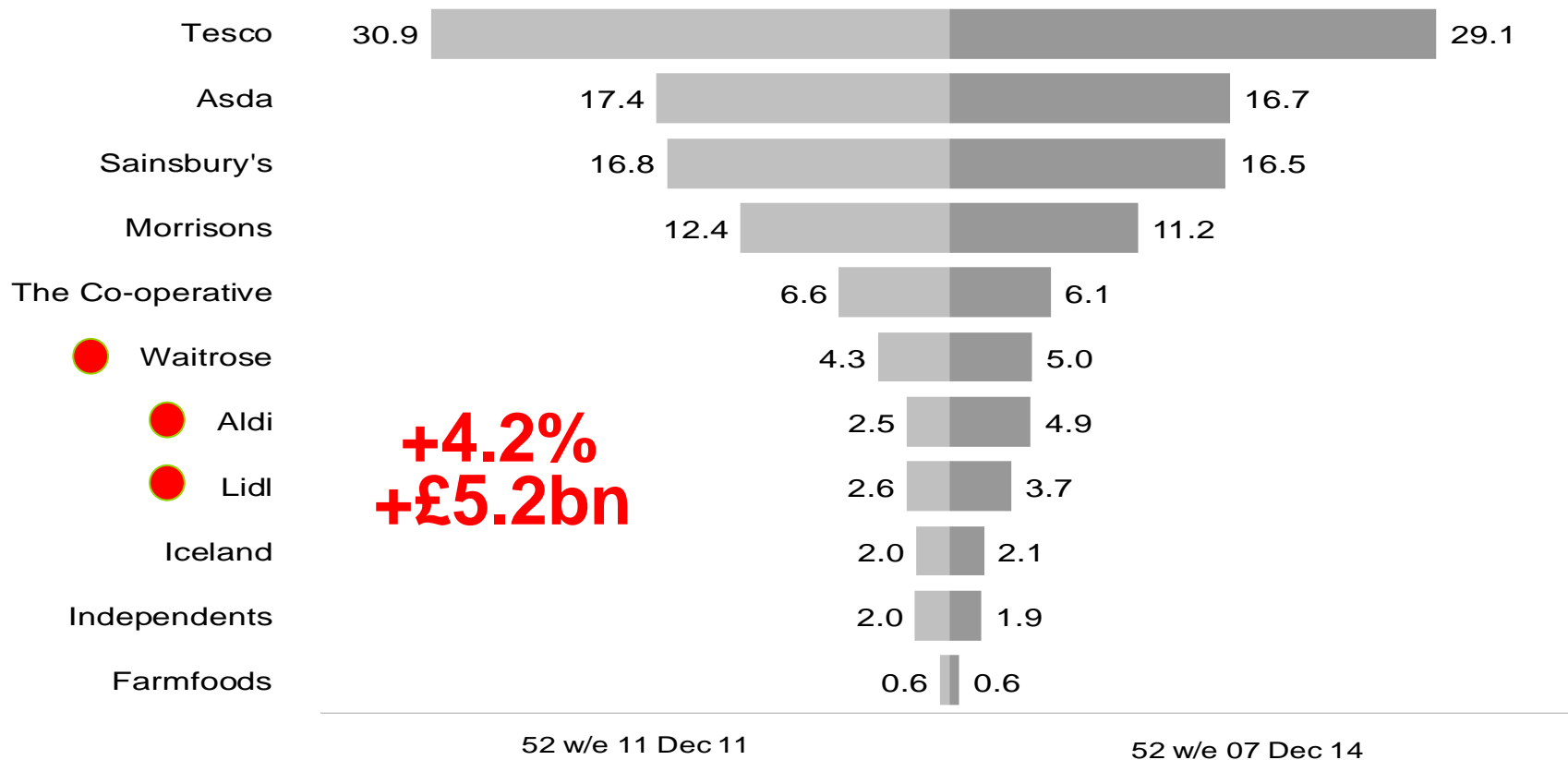
- External pressures
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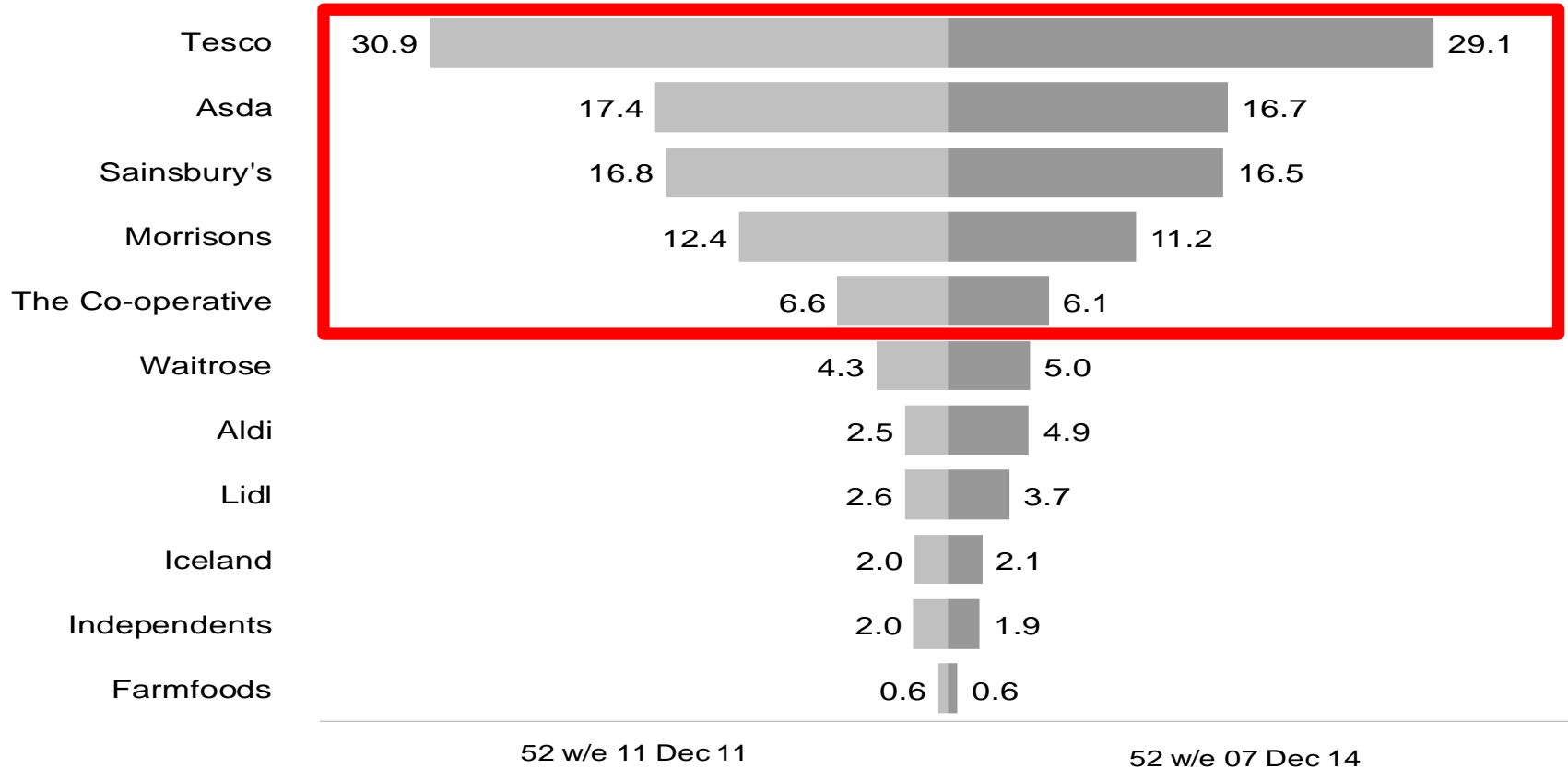
Long-Term Share of Till Roll Grocers



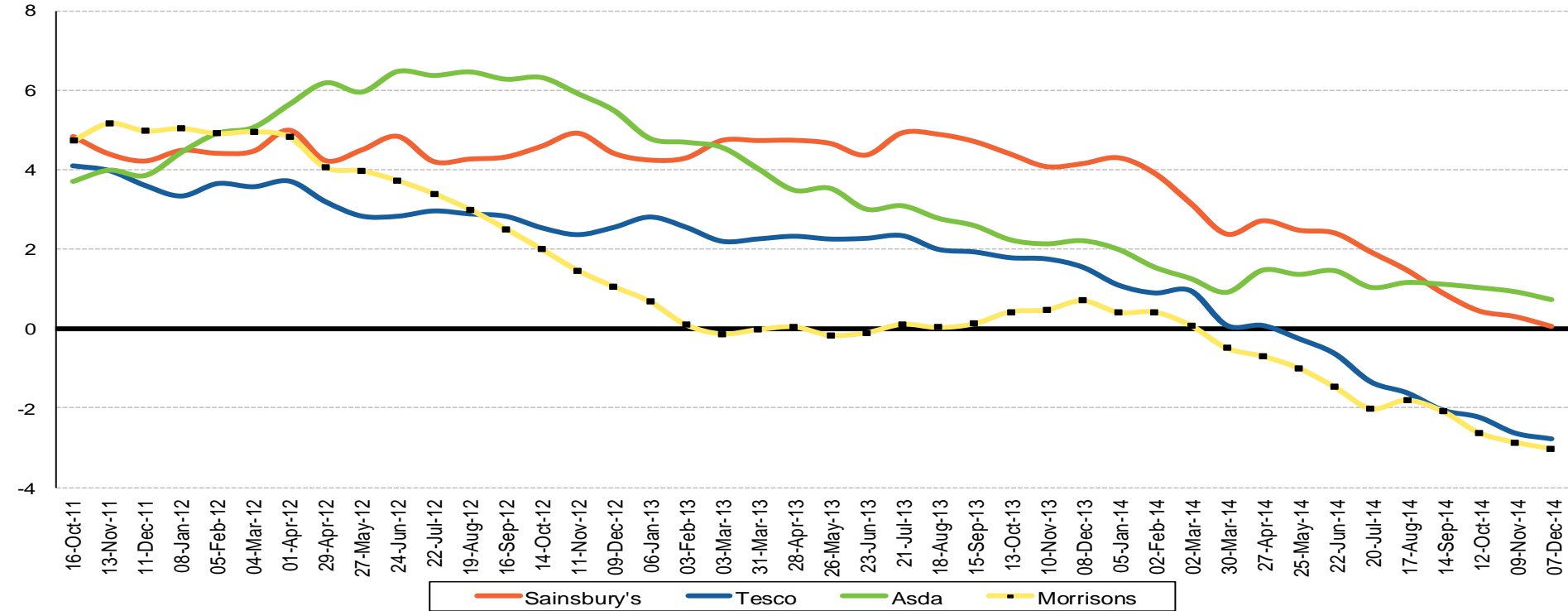
Latest Period Till Roll Totals - Share of Total Grocers



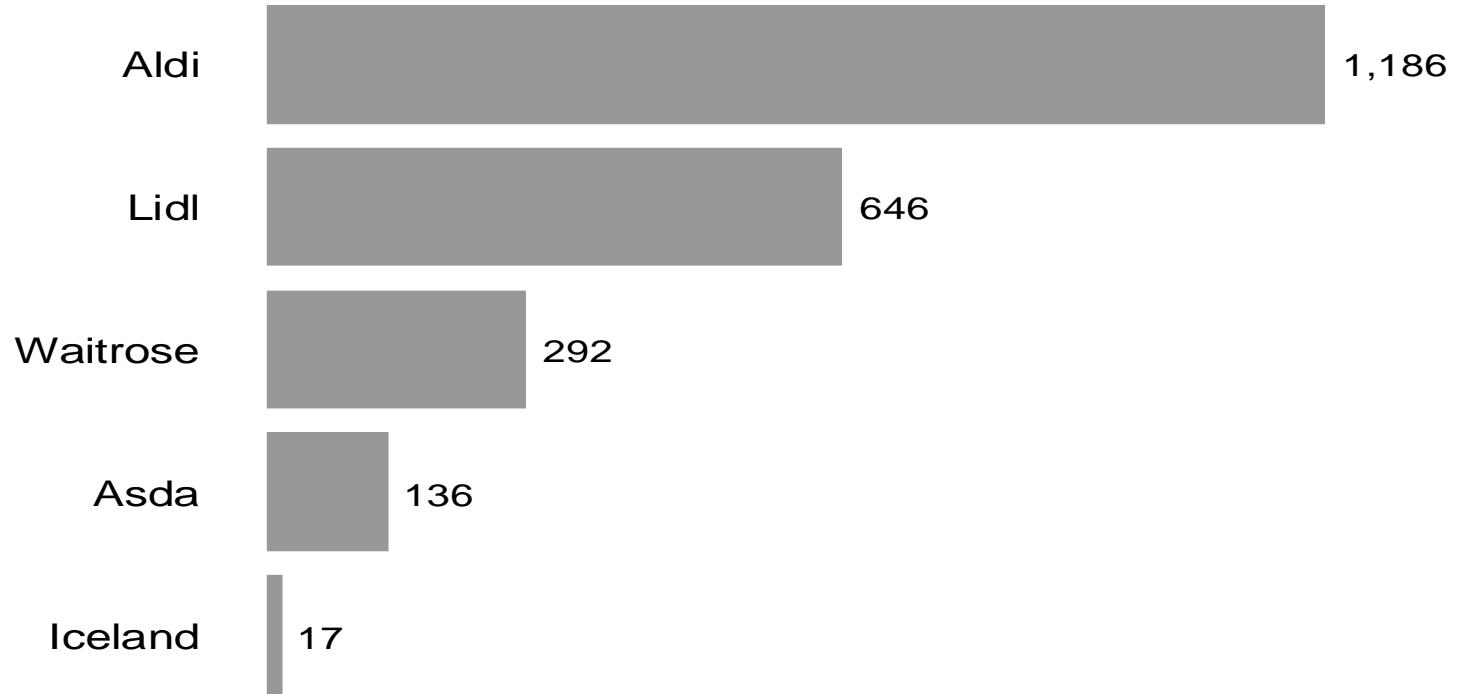
Latest Period Till Roll Totals - Share of Total Grocers



Till-Roll Trends - Annual £% Change - Rolling 52wk periods



Annual Till Roll Totals Expenditure Changes £m



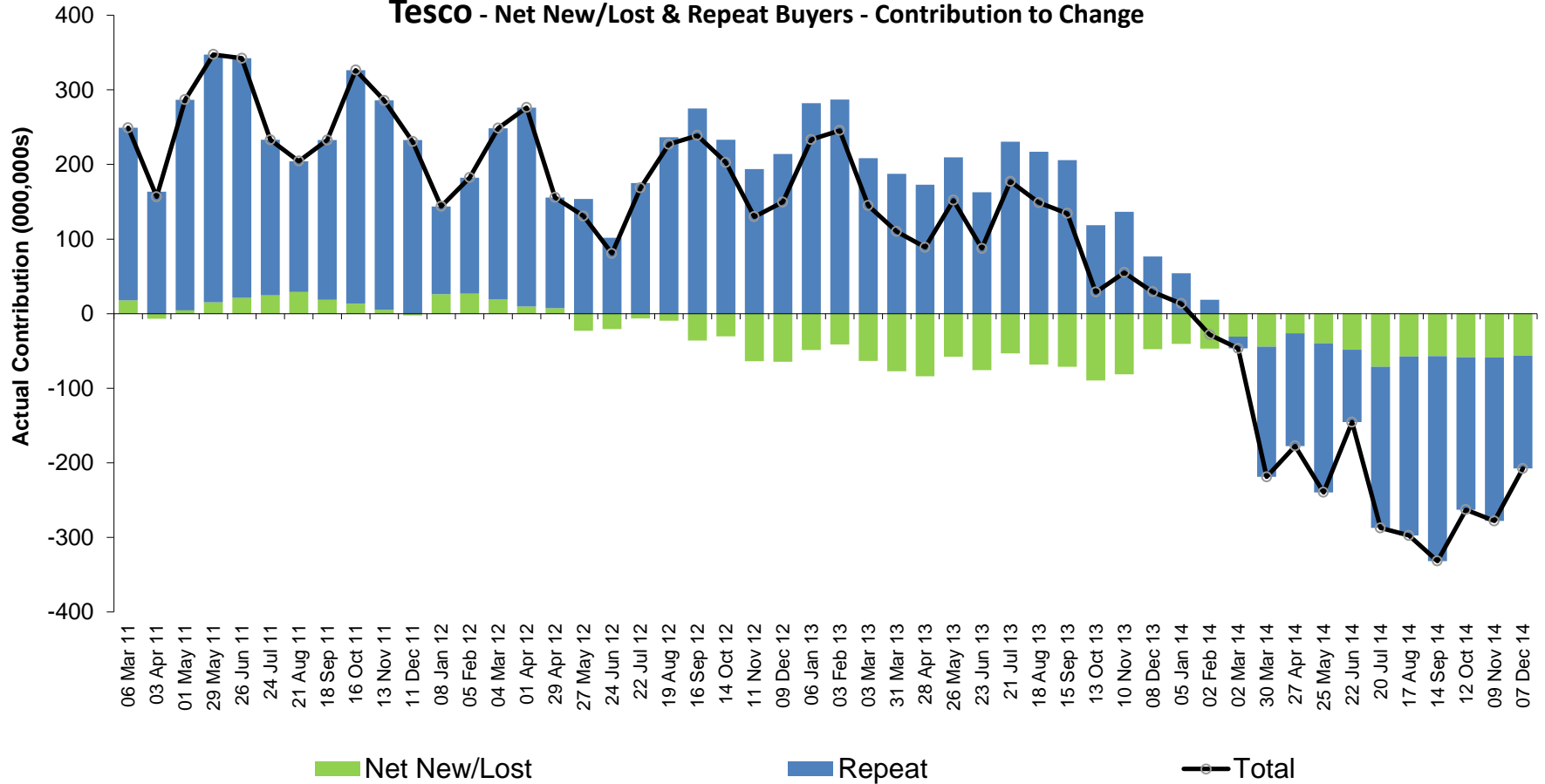
52 w/e Dec 07 2014 y/y £m Change



Hello

100%
British

Tesco - Net New/Lost & Repeat Buyers - Contribution to Change



Fresh food
& groceries



Tesco
direct



F&F
Clothing



Clubcard



Tesco
Bank



TESCO
**PRICE
PROMISE**

Our Price
Promise price
matches the
food you love,
so you don't
have to shop
around.



Real
Food



Wine by
the case



Discover
blinkbox



Phone
Shop



Christmas



Fuel
Save



Price
Promise



Christmas Q&A

Want to know our top turkey tips? Keen to find out how to make the most of your Brussels sprouts? Find answers to all of your Christmassy questions here

◀ ▶ 4/6



All things Christmas



Tasty roast dinners



SORTED food



Super soup



Edible gifts



Gingerbread is all around

Ways to shop



Look out for this basket to buy recipe ingredients.

[Learn more >](#)

or



[Click here to shop >](#)

Enjoy your favourite Starbucks® coffee at home



TESCO

HELLO

Welcome to
Tesco Taplo
EST. 2014

HERE
TO HELP

THE
PRICE
PROMISE





T.K. maxx



A photograph of the exterior of a Frankie & Benny's restaurant. The sign is illuminated and features the brand name in a stylized red font. Below the name, it reads "NEW YORK ITALIAN RESTAURANT & BAR" in a smaller, white, sans-serif font. The building facade is dark, and the sky is visible in the background.

NEW YORK ITALIAN RESTAURANT & BAR

THE HOME STREET
HOME OF
irresistible
COFFEE

THE HOME OF
HOME OF
Irresistible
COFFEE

THE NEW YORK
HOME OF
irresistible
COFFEE

[Groceries](#)[Favourites](#)[Recipes](#)[Special Offers](#)[Drinks offers](#)[Delivery Saver](#)[Fresh Food](#) | [Bakery](#) | [Food Cupboard](#) | [Frozen Food](#) | [Drinks](#) | [Baby](#) | [Health & Beauty](#) | [Pets](#) | [Household](#) | [Home & Ents](#)

Prices down and staying down

Iceberg lettuce each

Broccoli 335g

Whole cucumber each

Only
49p

Only
49p

Only
49p

[All Offers](#)[Salad](#)[Vegetables](#)[Milk](#)[Bread](#)[Eggs](#)[Butter](#)[Meat & poultry](#)[Sugar](#)[Baked beans](#)



Every little helps

Sign in

Store locator

Contact us

Help

Rate this page

Search in

Groceries

for

Keywords

Search

Fresh food
& groceries



Tesco
direct



F&F
Clothing



Clubcard



Tesco
Bank



TESCO groceries

Let us do the hard work for
you. Save time and money
when you shop online.

Christmas is here



Start shopping



My account



My current order



Delivery slots from £1



Favourites



Delivery saver from £3



Prices down



Louis Delaunay
Champagne 75cl
Better than half price



Only
£8

Shop now




ASDA

.....
SAVING YOU MONEY EVERY DAY
.....



If we're not 10% cheaper on your comparable grocery shopping we'll give you the difference. Guaranteed!

Where did you last shop?

 Like 1,235,777 people like this. [Sign Up](#) to see what your friends like.

My ASDA store

Please ensure that you've waited 3 hours after your shop to compare your receipt

ENTER RECEIPT



ASDA.com

Please ensure that you've waited 48 hrs after your shopping was delivered to compare prices

LOG IN TO ASDA.com



£1 can go a long way.

From our store, to your door.

Groceries delivered from £1

*Selected slots. Min £25 spend. Terms & Conditions apply



Book a slot

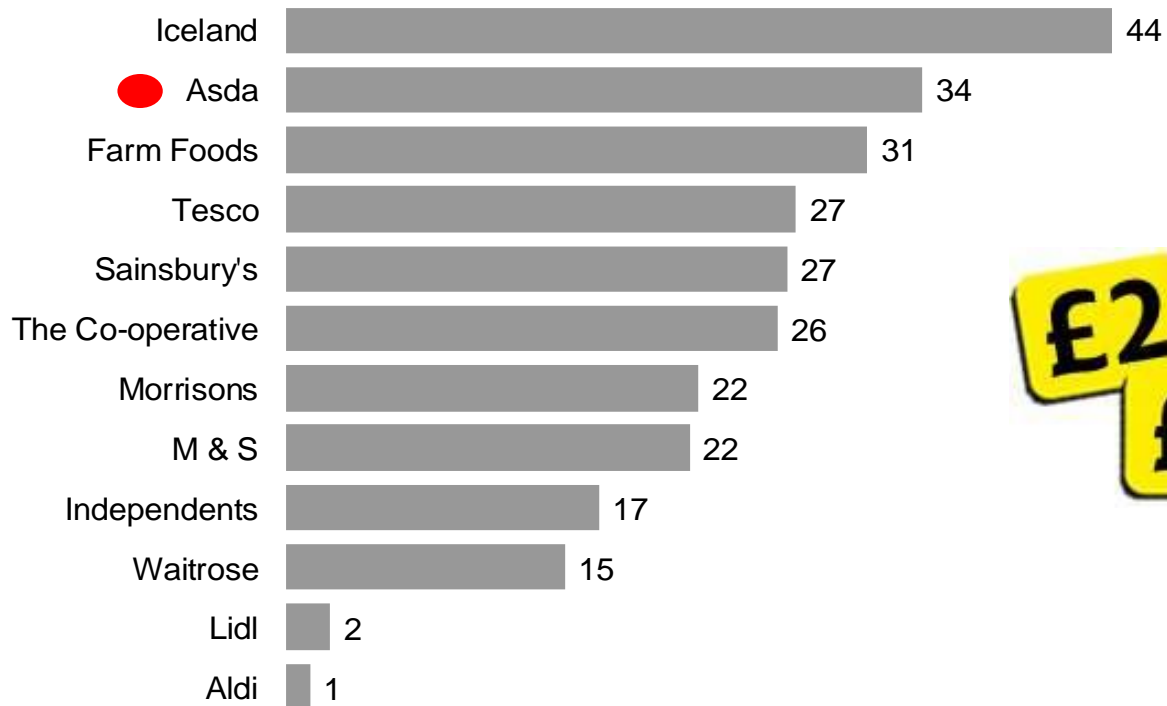


Lots of love for our £1 products

We've had a great response to our latest TV ad which showcases the thousands of fantastic products on sale at Asda for just £1 or less.



Grocery Share at Round Pound Prices £1/2/3/4 - £%



12 w/e 07 Dec 2014

Price LOCK

We have over 80 price locked essentials

They are not promotional,
they are everyday prices,
so you can be reassured
on your basket week in
week out.

Shop Price Lock >



50p
each

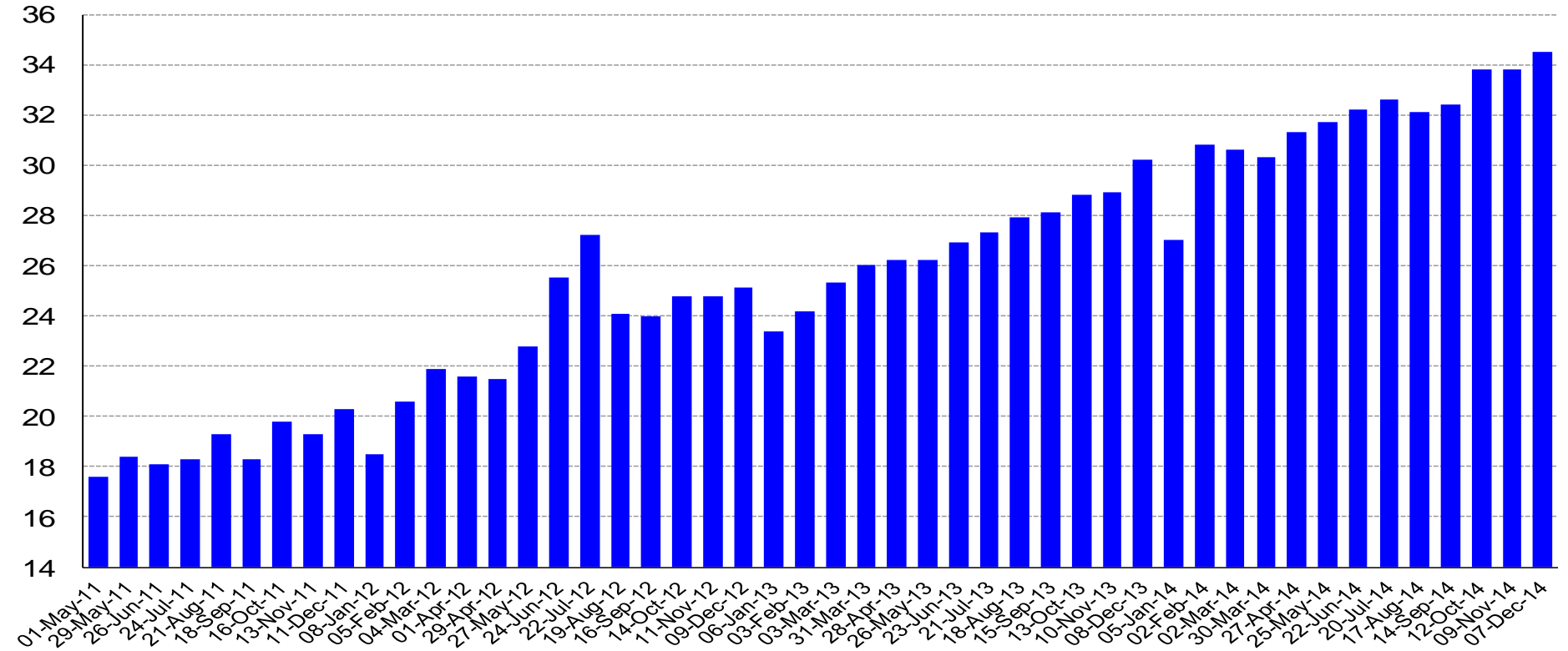


£1
each

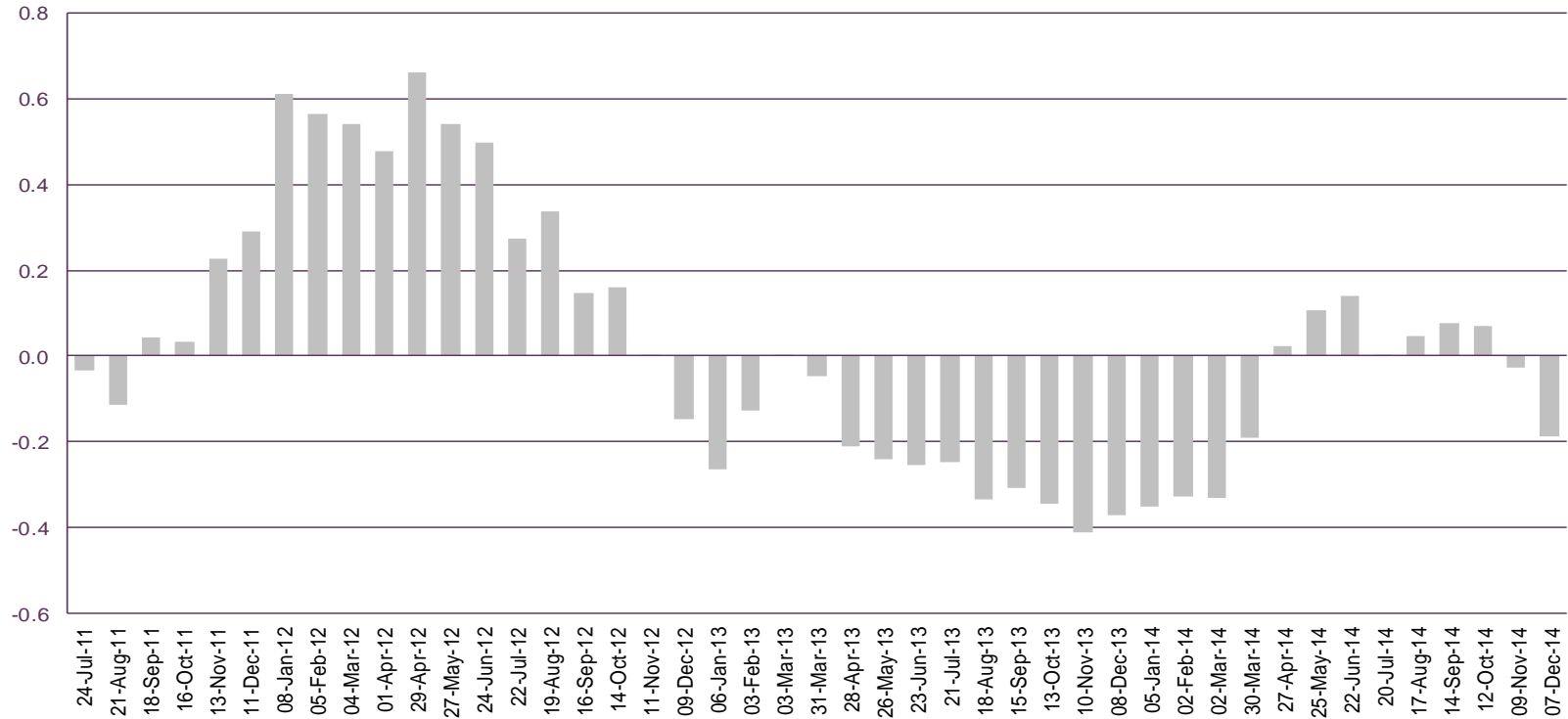


£2
each

Aldi share amongst Asda/Aldi Shoppers - £%



Asda Share Change - 12 week share year-on-year change



Sainsbury's

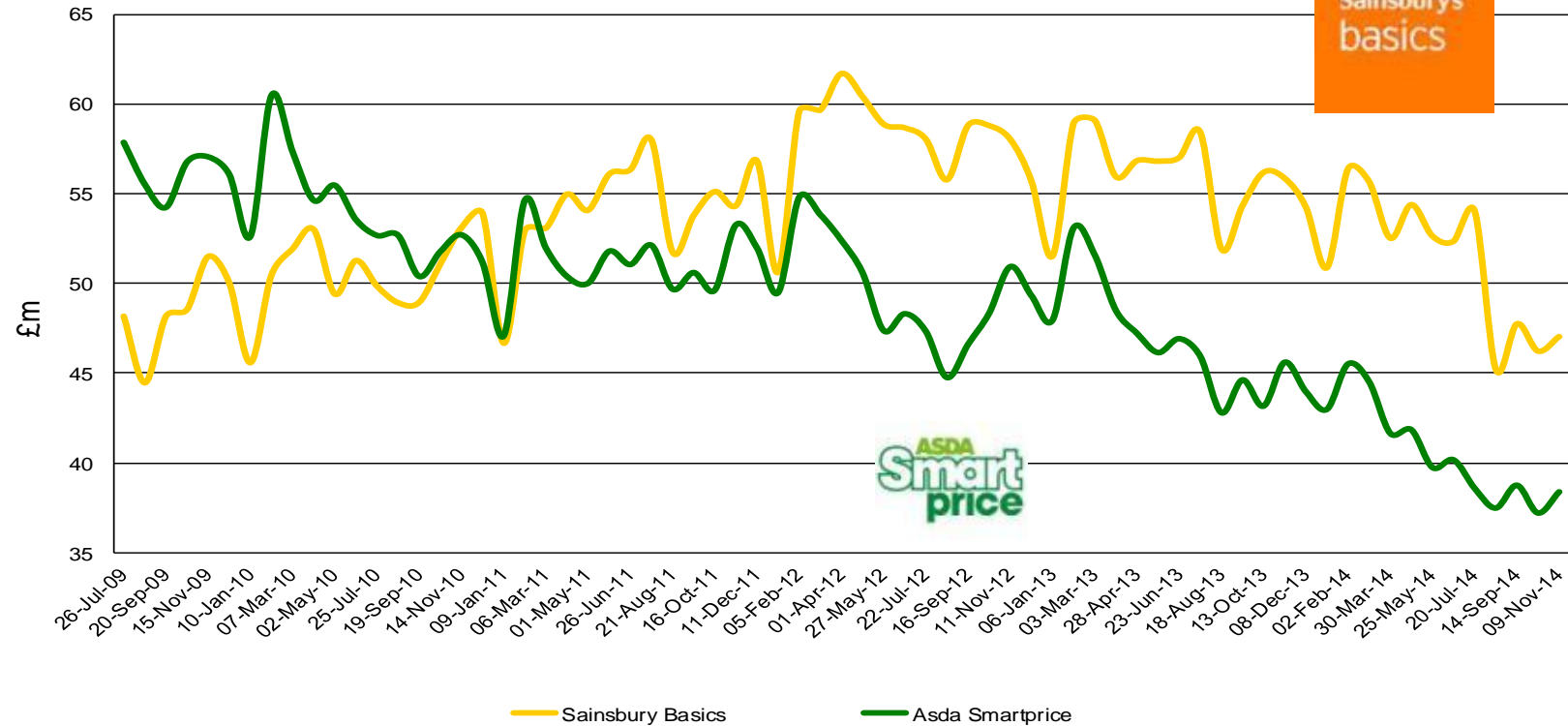


KANTAR WORLDpanel High definition inspiration

Value

Values

Basics v Smart Price - 4 weekly sales





Sainsbury's Brand Match

Sainsbury's Brand Match is another way to help you Live Well For Less than you thought at Sainsbury's.



We match Asda's deals and prices on brands

When you buy ten or more different products, we'll tot up the comparable brands in your basket. If you could have paid less at Asda – even because of the deal – we'll give you a coupon for the difference off your next shop.

Get practical help

- > [Terms, conditions and all exclusions](#)
- > [FAQs](#)

[Home](#)

See how we worked out Brand Match for you

Use this website to check the Brand Match calculations made on your recent shops. See why you got a coupon

or didn't. If you've shopped in the last 28 days, you can check Brand Match by using your shopping receipt or you can check by logging in with your Nectar card, to view all your shops from the past 8 weeks.

Value



Values

Sainsbury's Share Index

I actively seek out fair trade products	132
I am prepared to pay more for organic food	119
I regard myself as a connoisseur of food and wine	114
I try to buy environmentally friendly products	110
I consider that price is the most important factor	86

Till Roll Share indexed on All Shoppers – 52 w/e May 25 2014



Nectar is changing at Sainsbury's

From 11 April 2015, we're changing the way you earn Nectar points, so you'll earn 1 point for every £1* you spend in store and online at Sainsbury's. You'll also no longer receive 1 Nectar point for every bag you reuse in store.

The Changes at a glance

From 11 April



From 11 April



No change



While this means you'll earn fewer points on your shopping, you'll still earn 1 point per litre of fuel as before. Plus, we'll be bringing you lots of new opportunities to boost your balance faster.

More ways to collect points

These include a month-long 10 x bonus points on fuel events and after the change there will be more bonus points events across our stores.



What does this mean for you?

More Nectar products

- [> Register Your Nectar Card](#)
- [> Check Your Points balance](#)
- [> Nectar Frequently Asked Questions](#)
- [> Collecting Nectar Points](#)
- [> Get The Sainsbury's Smartphone App](#)

New to shopping for your groceries online?



Let us do the hard work. Order your groceries online and we'll deliver to you. You can enjoy handy 1 hour delivery slots and 100s of great deals. Plus, get £15 off your first online grocery shop of £60* or more, excluding delivery charge.

[> Get code](#)



MORRISONS





MORRISONS

Shop
onlineMatch
& More

Contact Us



Store Finder

Offers

Christmas

Market Street

Recipes & Ranges

Clothing

Kids & Baby

Lifestyle

Competitions

Fresh food, fantastic service

We're here to make your shopping stress-free

Do we deliver to you?

Enter your postcode below

FIND OUT

Market Street

Butcher

Shake & Season

Fishmonger

Bakery

Cake Shop

Greengrocer

Deli

Oven Fresh

Fresh To Go

Flowershop

Café

100% Satisfaction Guarantee

Check out our TV ad!

Quick recipe Search

Search for a recipe to plan your
perfect menu

e.g. Roast

Go

Advanced search >

Butcher



Our Academy trained butchers will prepare your 100% British meat just the way you like it. They can also offer advice on how to get the most out of your meat, and even suggest alternative cuts that you may not have tried. We're always happy to help, so take a look at what we can offer and be sure to visit your local Market Street butcher in store.

Behind our counters...

From sirloin steaks to pork chops we check over every cut to ensure you get quality fresh meat every time. We also prepare all our 100% British meat in store, all you have to do is tell us how you like it!



Find your local experts >



MORRISONS

Shop
onlineMatch
& More

Contact Us



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Christmas

Market Street

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Kids & Baby

Lifestyle

Competitions

Fresh food, fantastic service

We're here to make your shopping stress-free

Do we deliver to you?

Enter your postcode below

eg BD3 7DL

FIND OUT

Market Street

Butcher

Fishmonger

Bag & Bake Fish

Bakery

Cake Shop

Greengrocer

Deli

Oven Fresh

Fresh To Go

Flowershop

Café

100% Satisfaction Guarantee

Check out our TV ad!

Quick recipe Search

Search for a recipe to plan your
perfect menu.

e.g. Roast

Go

Advanced search >

Fishmonger



From mussels to mackerel, our Academy trained fishmongers have a fantastic range of fish to offer on Market Street. With our in store expertise you'll find everything you're looking for, from recommendations on the perfect fish for your meal to advice on how to prepare fuss-free fish. Remember to pop by our fish counter next time you're in store!



From Catch to Kitchen

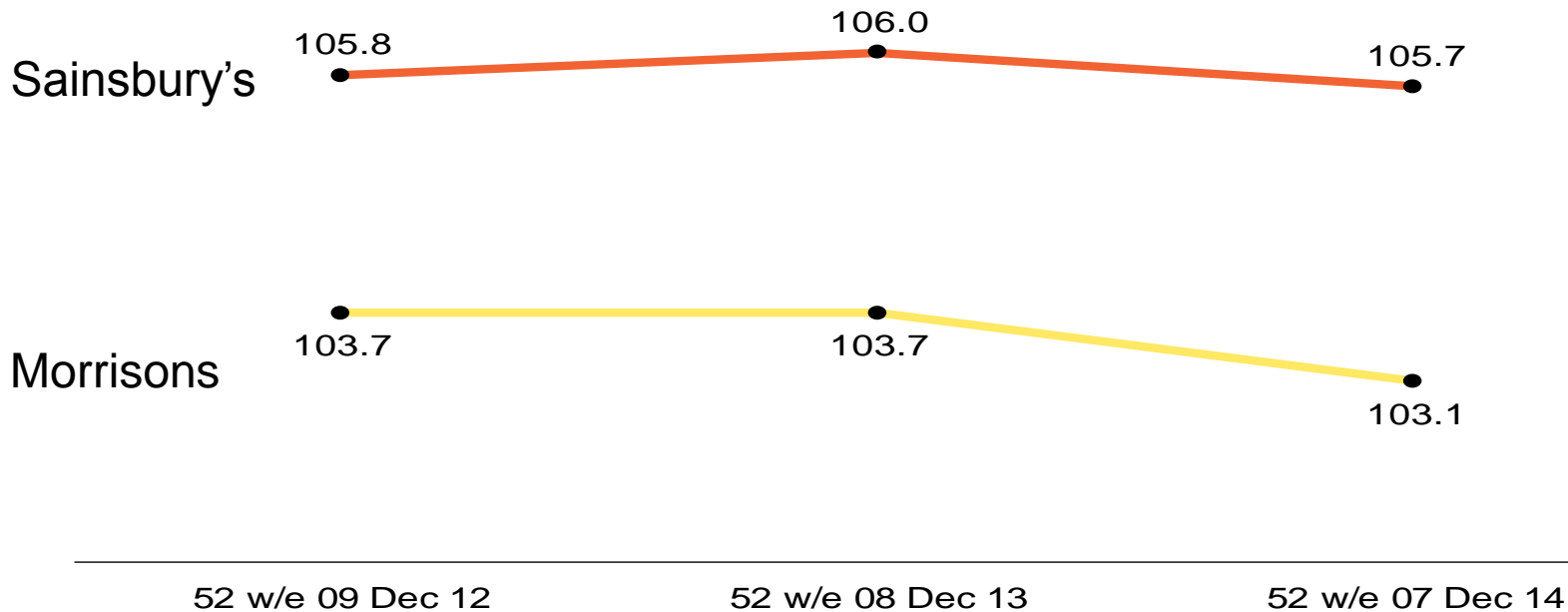


Find your local experts >

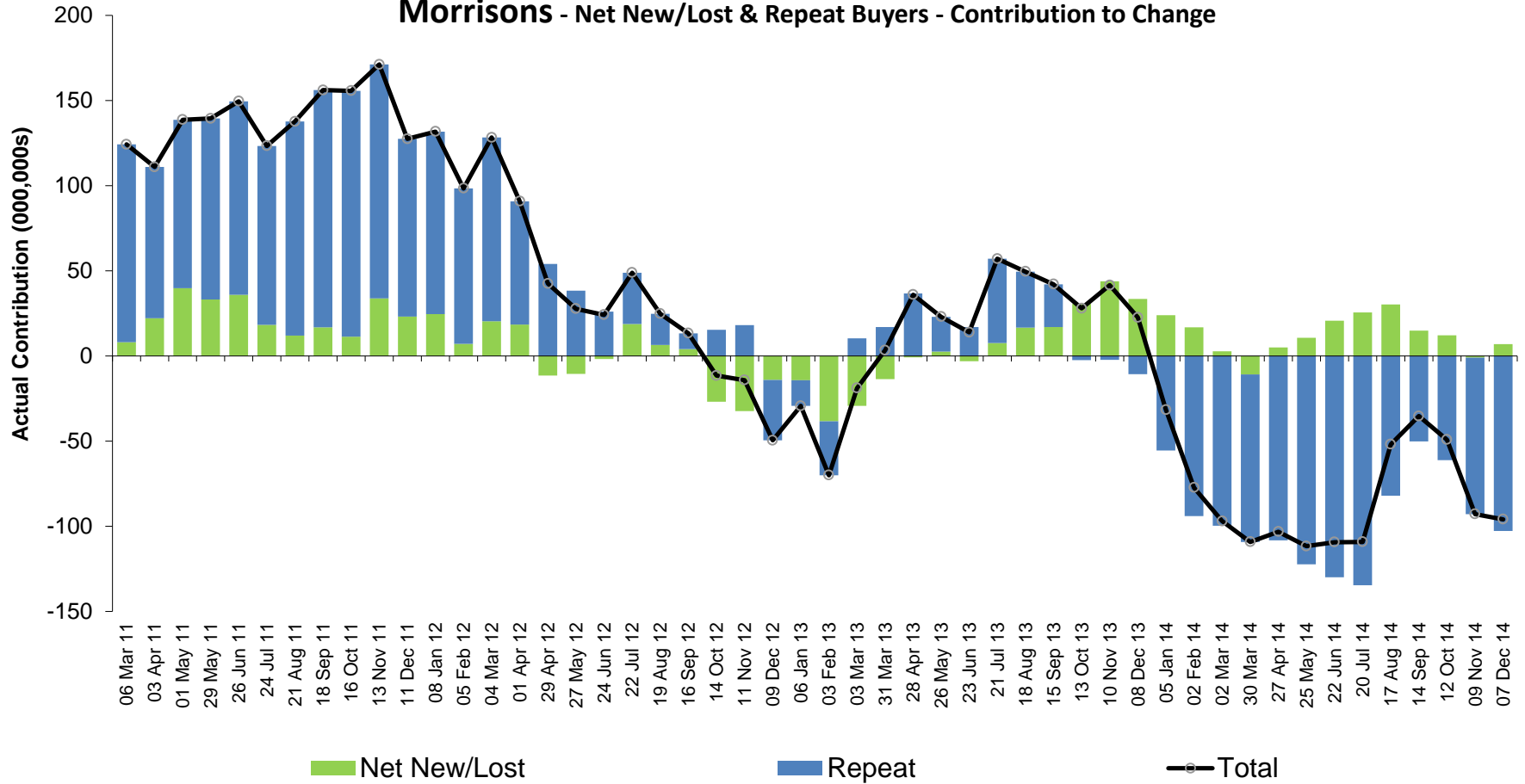
Market Sectors indexed on Total Groceries

●	Fresh Fish	130
●	Fresh Meat	118
●	Chilled Bakery Products	113
	Canned Goods	111
●	Chilled Convenience	107
●	Fresh Poultry+Game	105
	Hot Beverages	105
	Alcohol	103
	Biscuits	103
	Savoury Home Cooking	103

Fresh & Chilled Trading Indices



Morrisons - Net New/Lost & Repeat Buyers - Contribution to Change





6am-11pm
every day

Fresh fruit & veg
Fresh meat & fish
Fresh bread
Hot food

WELCOME TO
ILKLEY

M local ilkley







Match & More

We now price match Aldi and Lidl...
...as well as Tesco, Sainsbury's and Asda

JOIN NOW



**CHECK YOUR
POSTCODE**
See if we deliver to
your street



**REGISTER YOUR
DETAILS**
Complete your
delivery info



**IMPORT YOUR
FAVOURITES**
Quickly transfer your
shopping list from
other supermarkets

*Start shopping in
three simple steps*

GET SHOPPING

WHERE WE DELIVER

See where we deliver, and where's next



VIEW OUR MAP

1-HOUR DELIVERY FROM £1

Book a delivery slot for £1, £3 or £5



FIND OUT MORE

OUR FRESH FOOD GUARANTEE

If it's not fresh it's free



FIND OUT MORE

Morrisons have found a way to match Lidl's prices*

*

- Go to the Morrisons website
- Find the new 'loyalty card scheme' page
- Set up your online account
- Create memorable password
- Confirm memorable password
- Hand over some 'minor details' about yourself such as name, last name, email and post code
- Remember to un-tick the 'Would you like to receive spam?' box
- Hand over some more 'minor details' about yourself such as post code (again), DOB, mobile number and double check you're definitely the gender you think you are
- Tell them how many people live in your household and choose from an endless list of dietary requirements
- Request a card
- Wait around for the card to turn up
- Sign back into your account
- Try to remember your memorable password
- Enter your 19 digit card number onto the website
- Then enter the CORRECT 19 digit card number
- Realise the price match difference is given to you in points
- Learn that 1p = 10 points
- Then realise you can only start saving when you have your first 5,000 points
- Practise your mental arithmetic and work out that 5,000 points is £5
- Go into your M local store and discover you can't use your loyalty card here
- Head to a big Morrisons
- Find out your basket must include one product that is comparable to another supermarket's to make a saving
- Pick up some beans and realise they aren't part of the deal
- Try and find the beans that are part of the deal
- Wonder if that applies to beans with sausages?
- Search for other applicable items so your shop exceeds the £15 required spend
- Finally, receive your £5 voucher after you've paid for your stuff
- Get told you can only spend the £5 voucher on your next shop

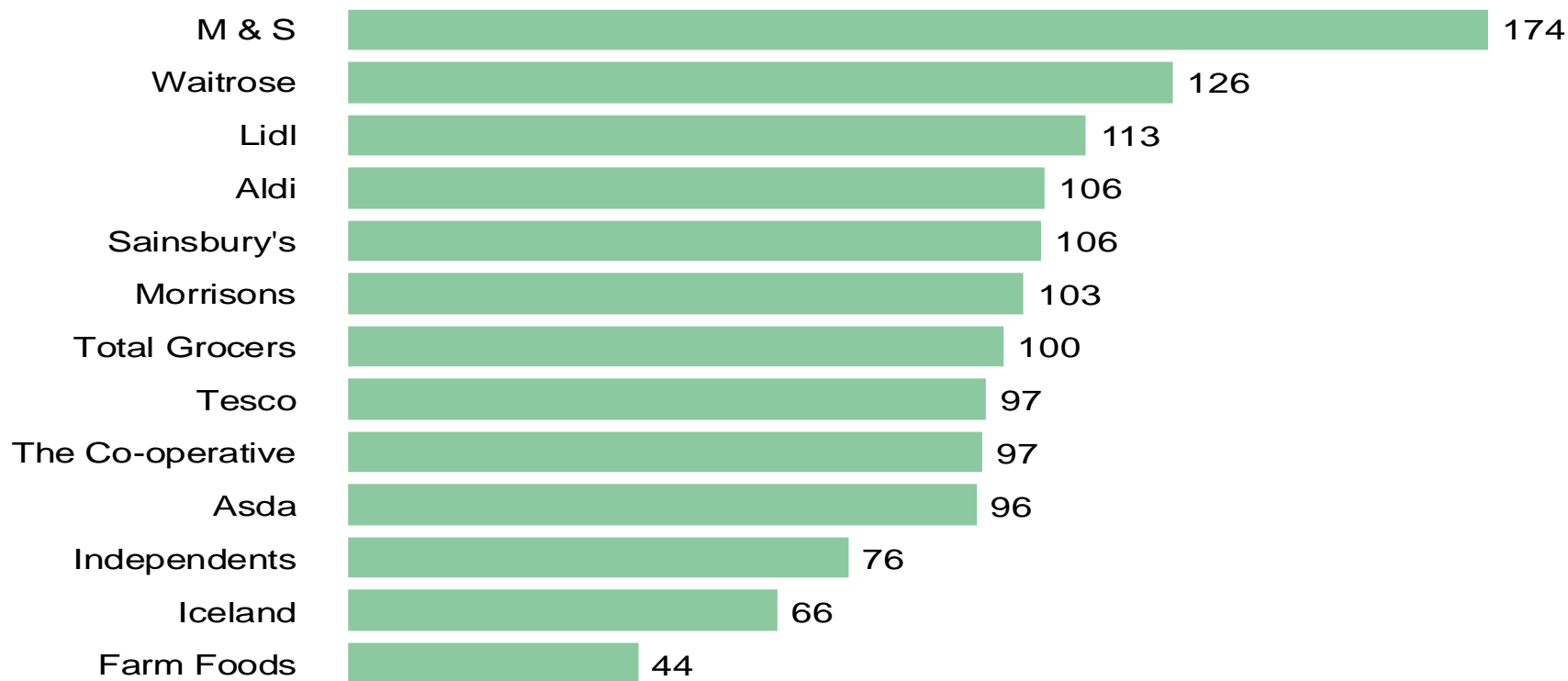
Or you could just go to



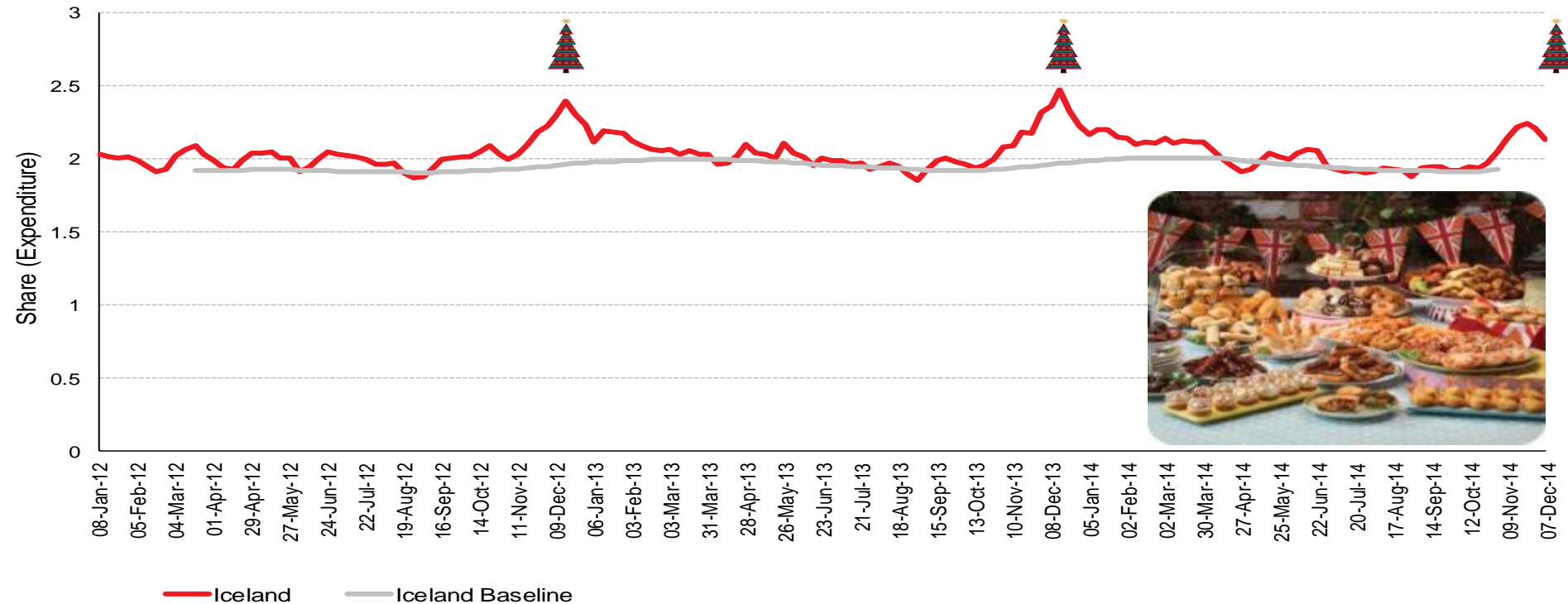
Frosty morning? Don't worry, we've found a use for that Morrisons card...



Fresh + Chilled Trading Indices - 52 w/e Dec 07 2014



Iceland Share of Till Roll Grocers



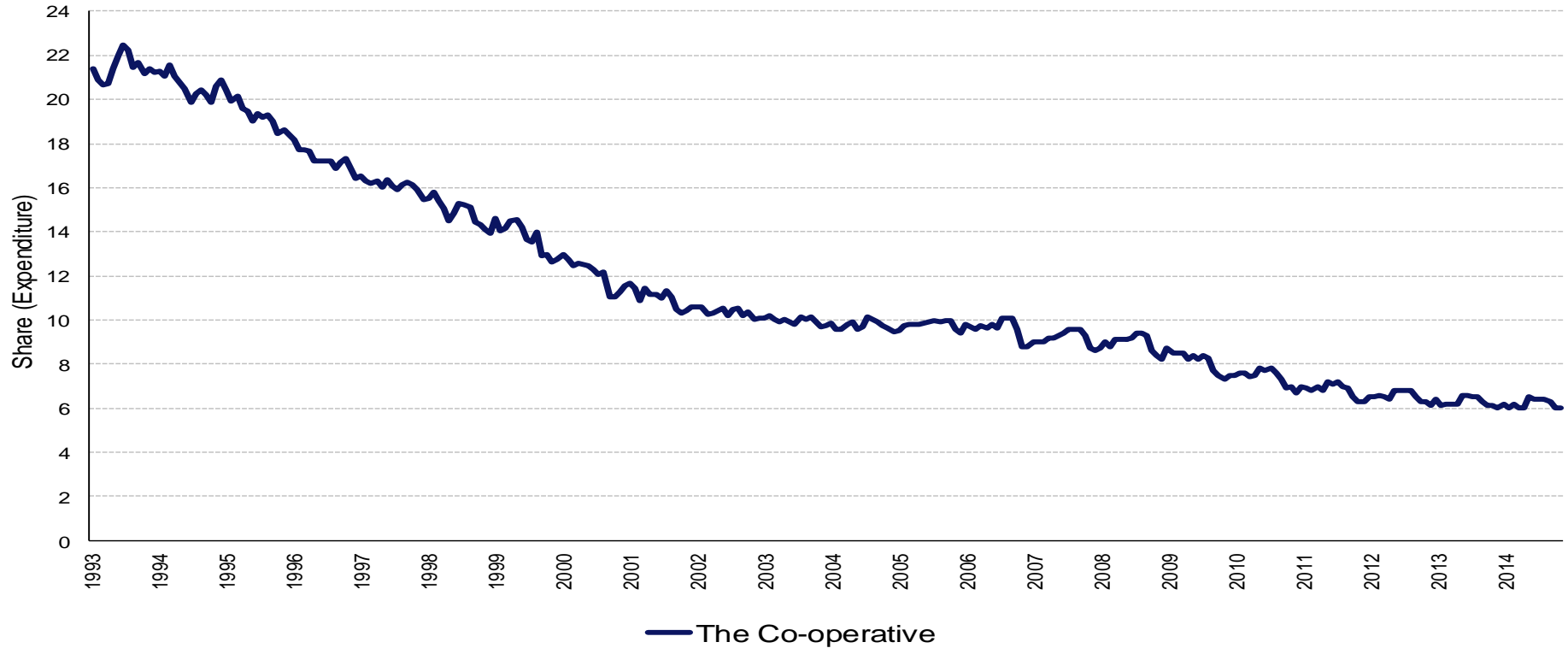
Weekly 3 Point Centred Moving Average

Iceland

Household Income Signatures

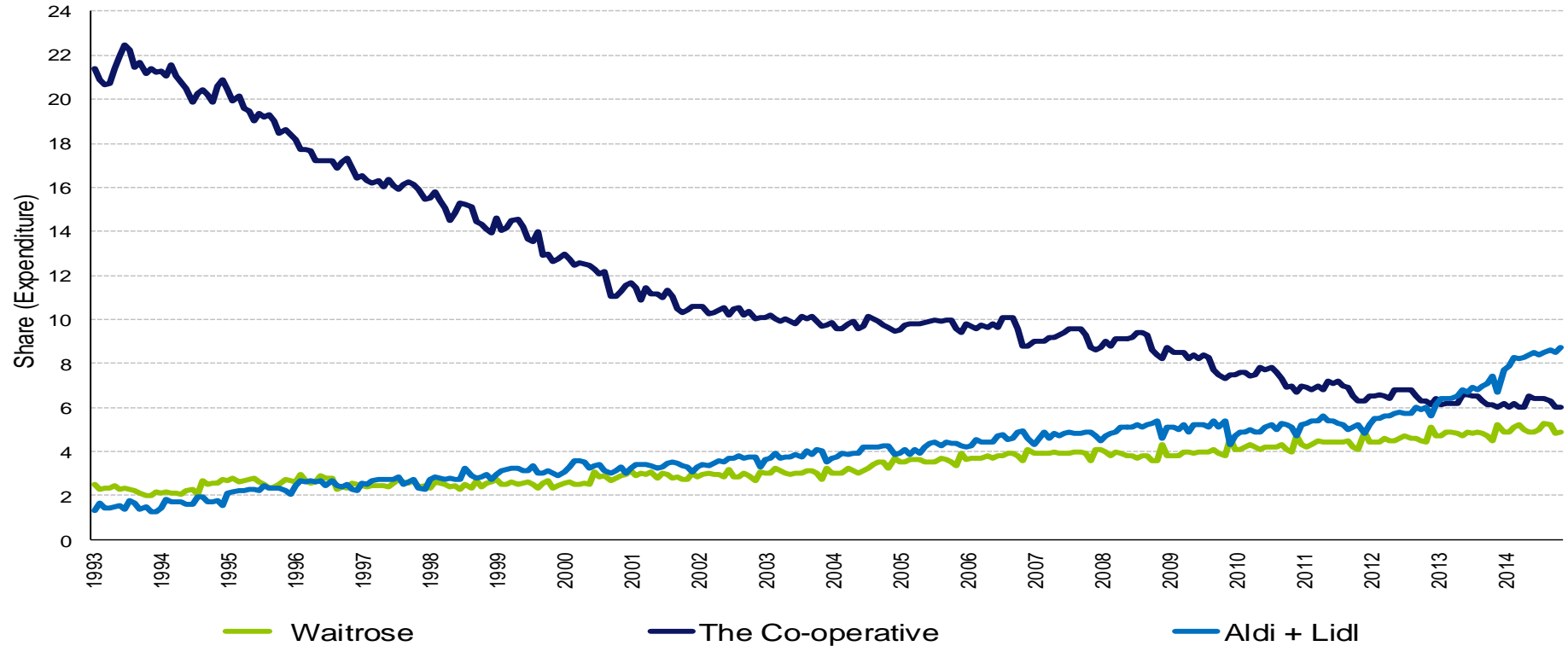


Long-Term Share of Till Roll Grocers

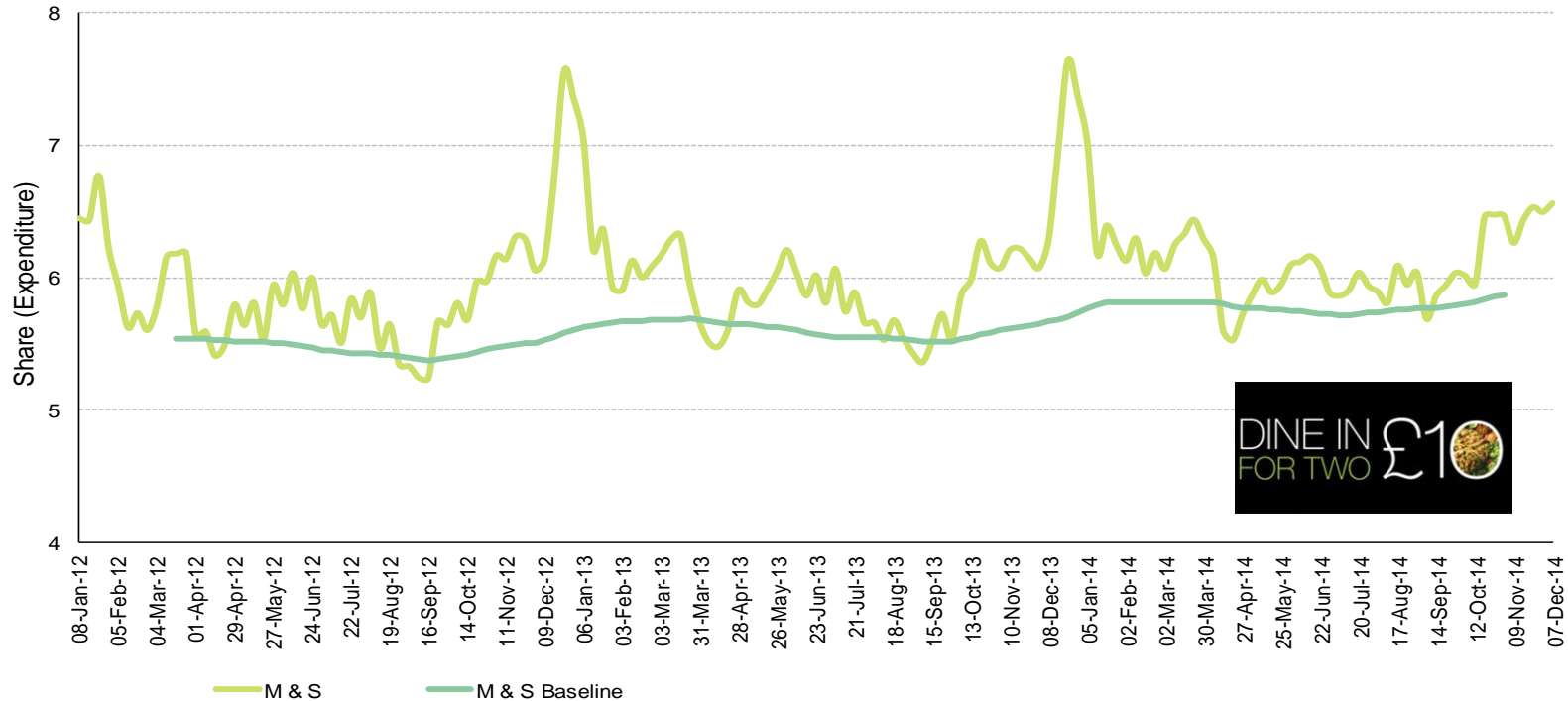


The co-operative

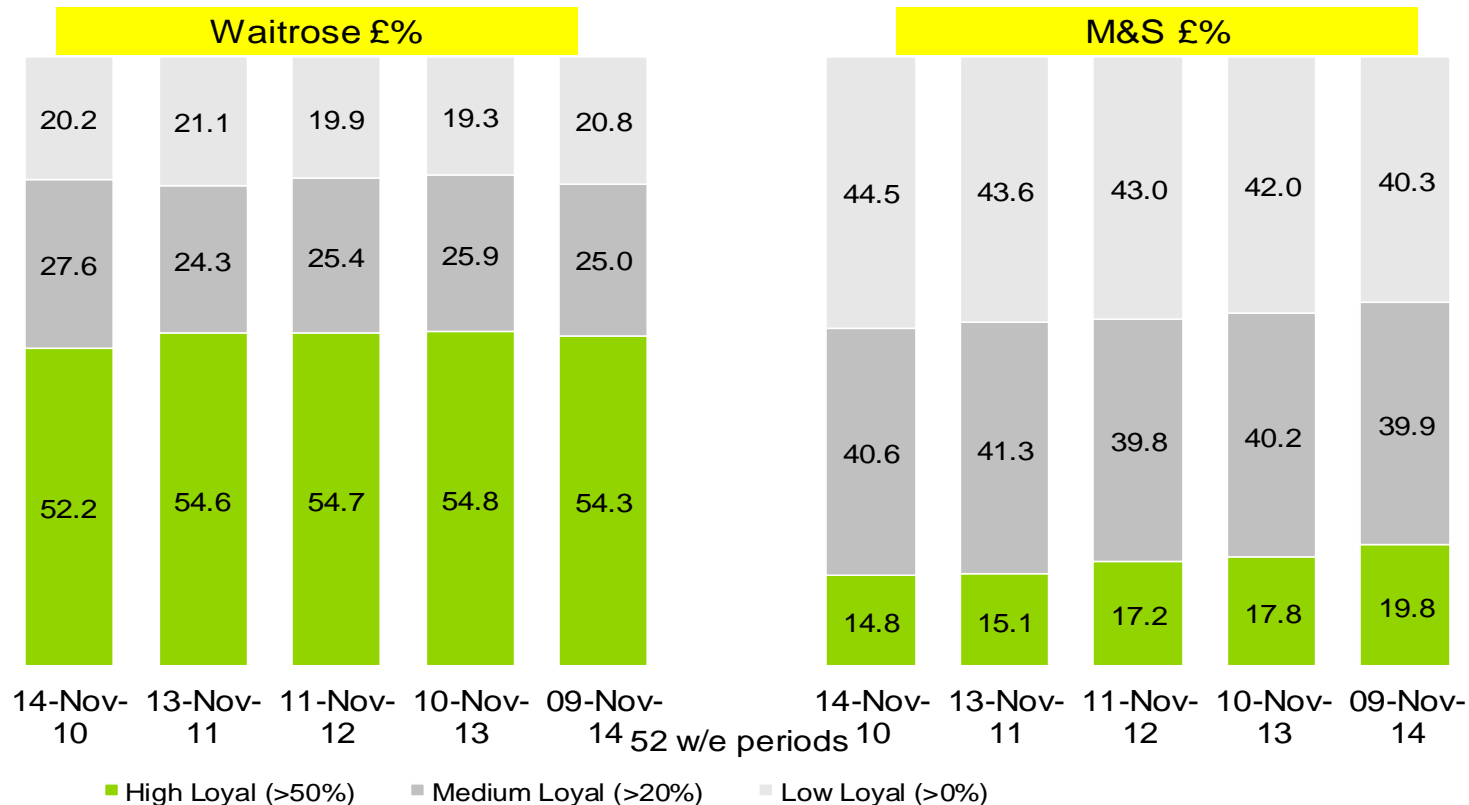
Long-Term Share of Till Roll Grocers



M&S Share of Fresh & Chilled Groceries



Trended Loyalty Breakdown



“FOR TONIGHT” – SHOPPER MISSIONS % WITHIN OUTLET

	2011	2012	2013
Marks & Spencer	40	40	● 41
Sainsbury's Local	21	21	21
Budgens	17	18	19
The Co-operative	19	19	19
Tesco Express	21	20	19
Tesco Metro	18	18	17
Independents	14	15	16

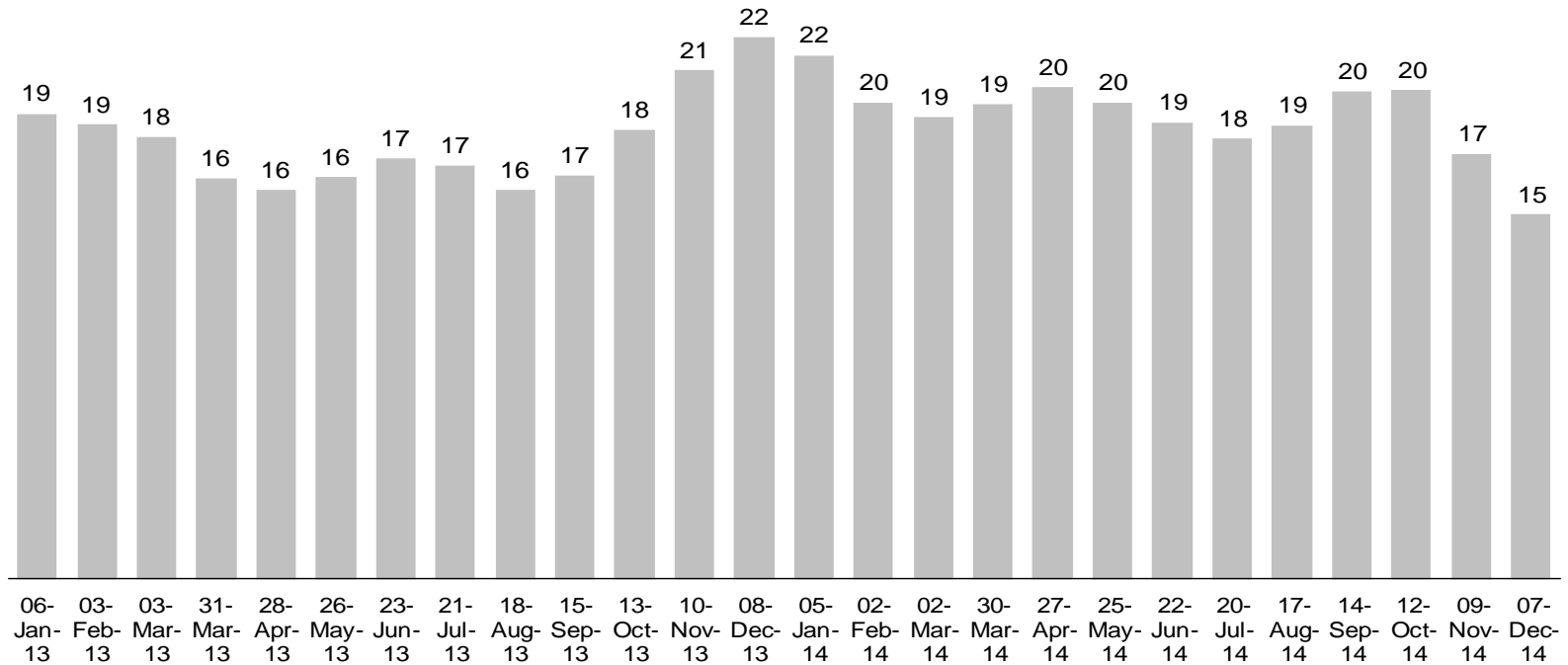
The Agenda

- External pressures
- The Squeeze
- The Effect
- > – Home Delivery
- Seeking Differentiation
- A role for Ethical Claims
- Beef Insights

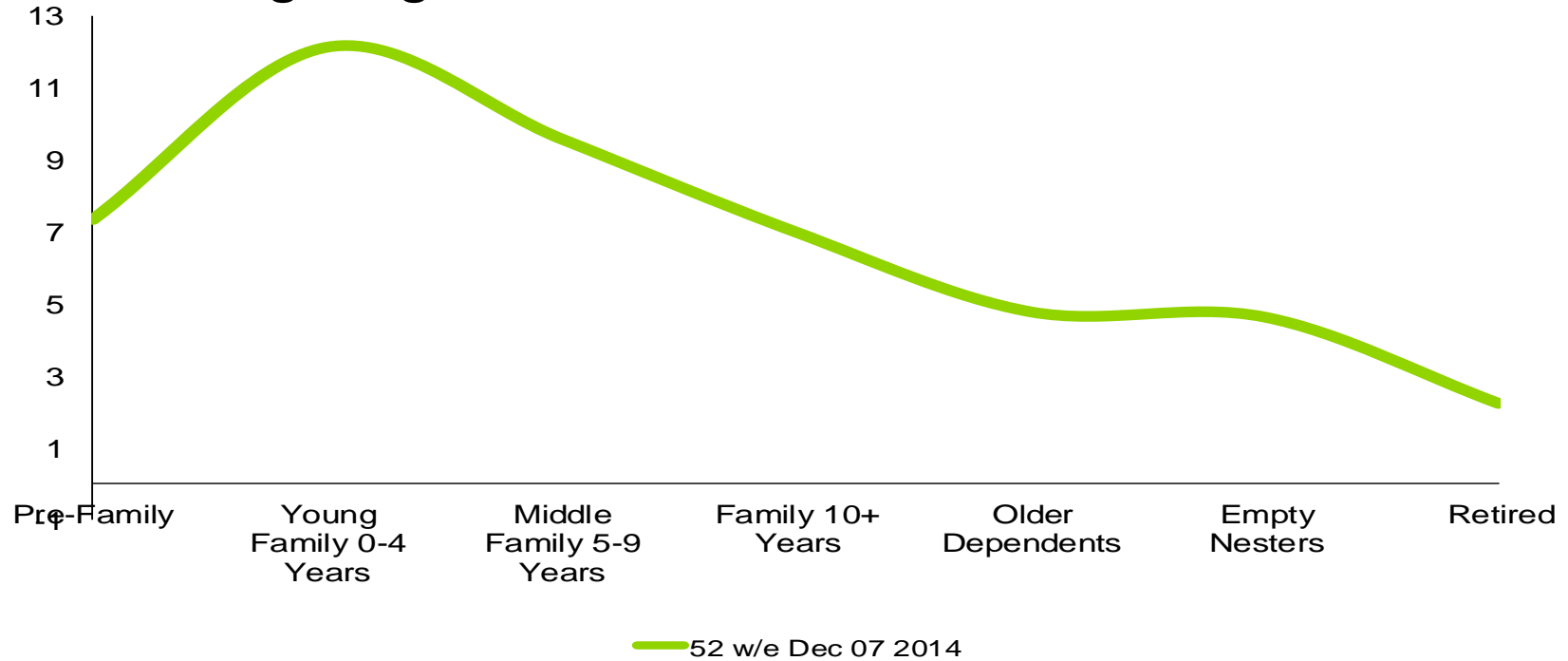




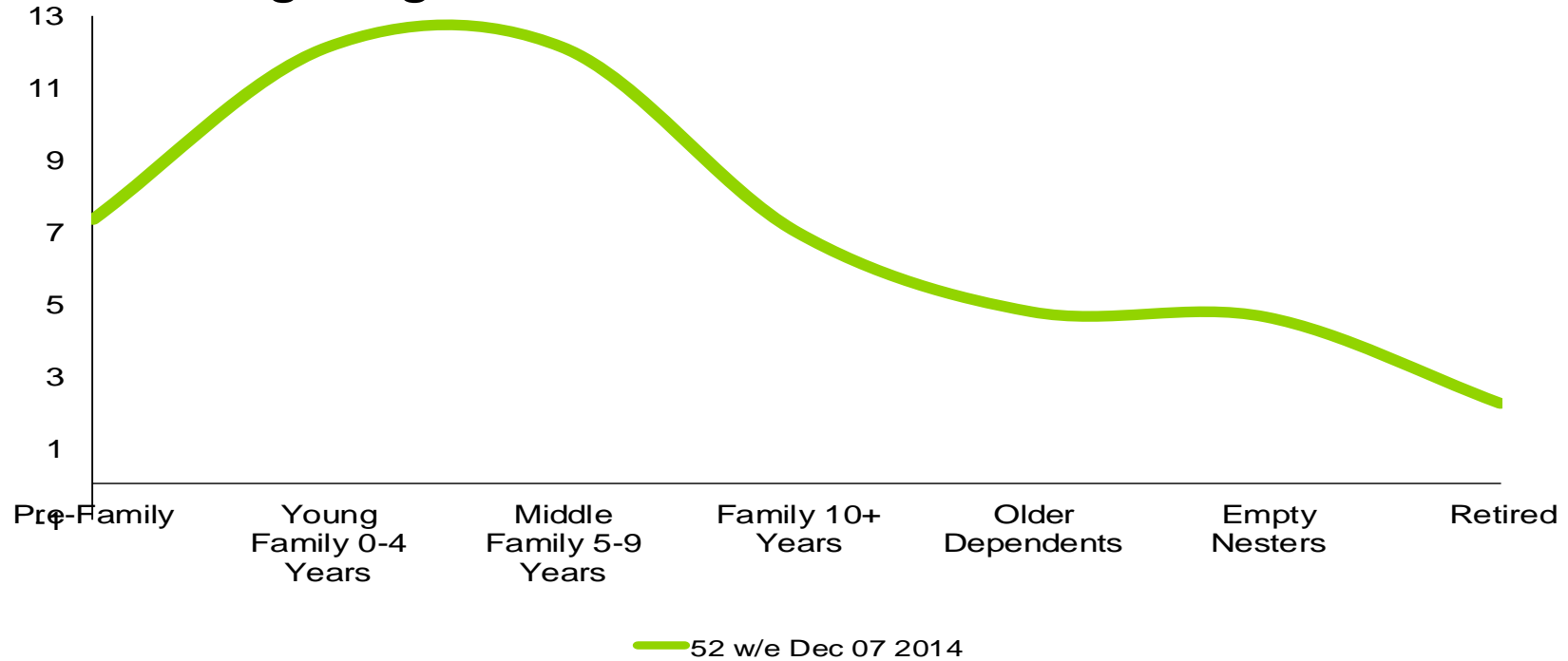
Total Internet Grocery - Rolling 12 w/e growth



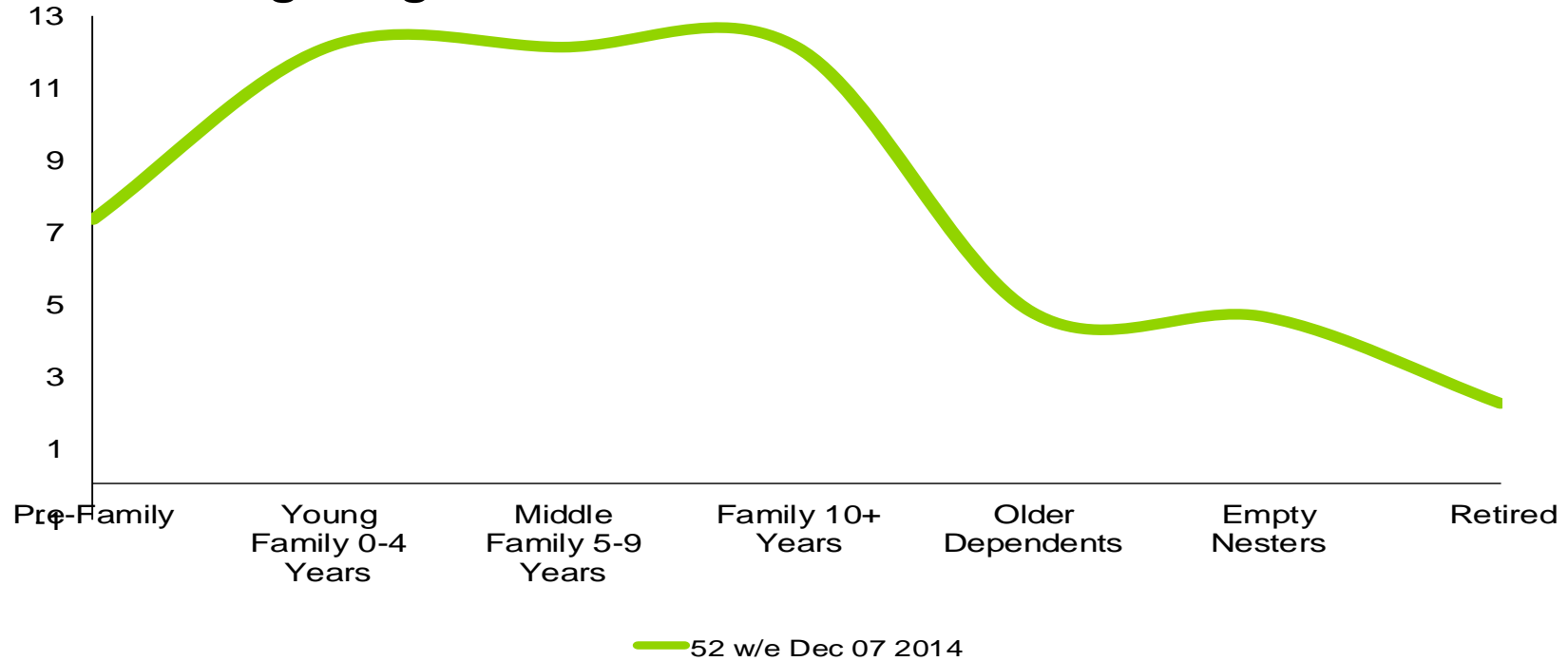
Total Grocery Internet Lifestage Signatures



Total Grocery Internet Lifestage Signatures



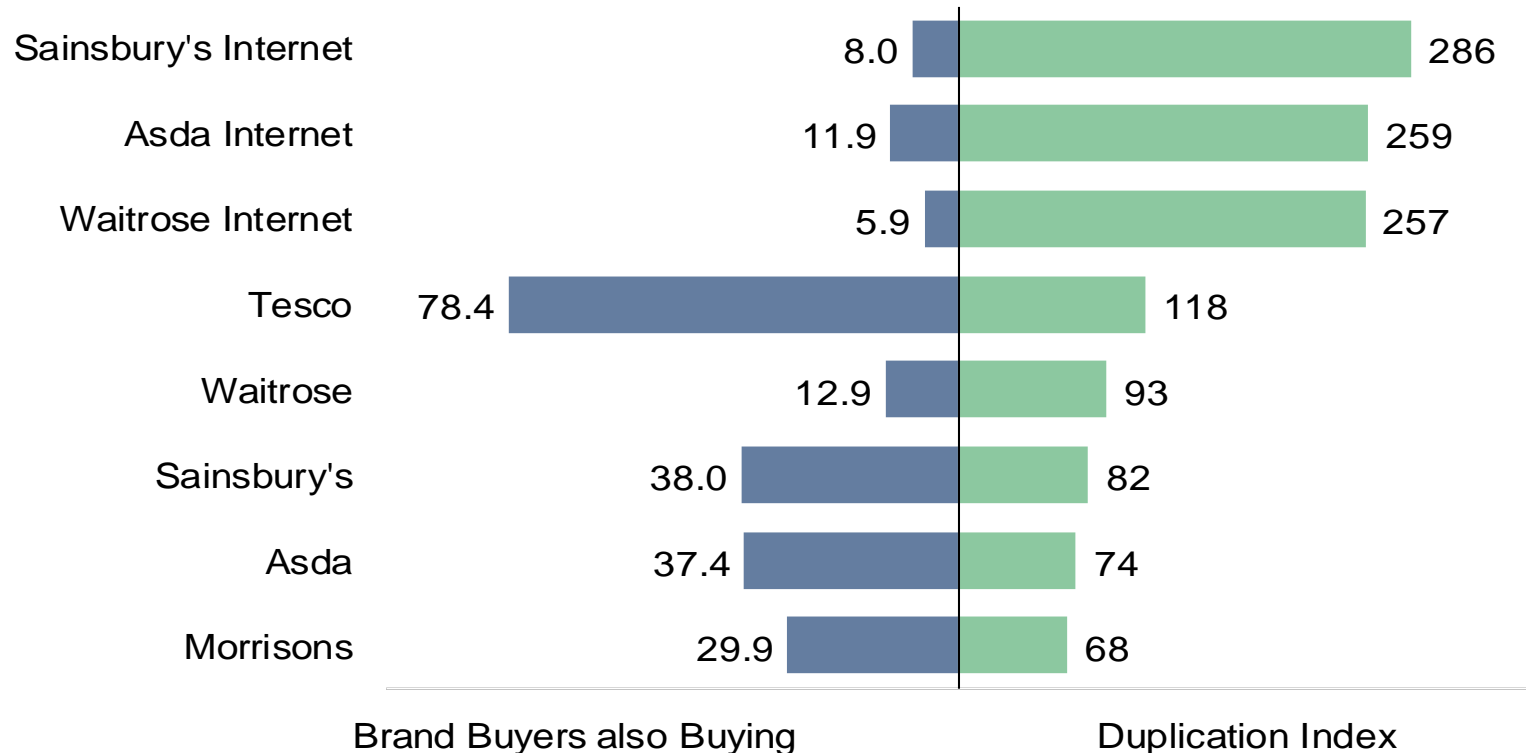
Total Grocery Internet Lifestage Signatures



Total Grocery Internet Household Income Signatures

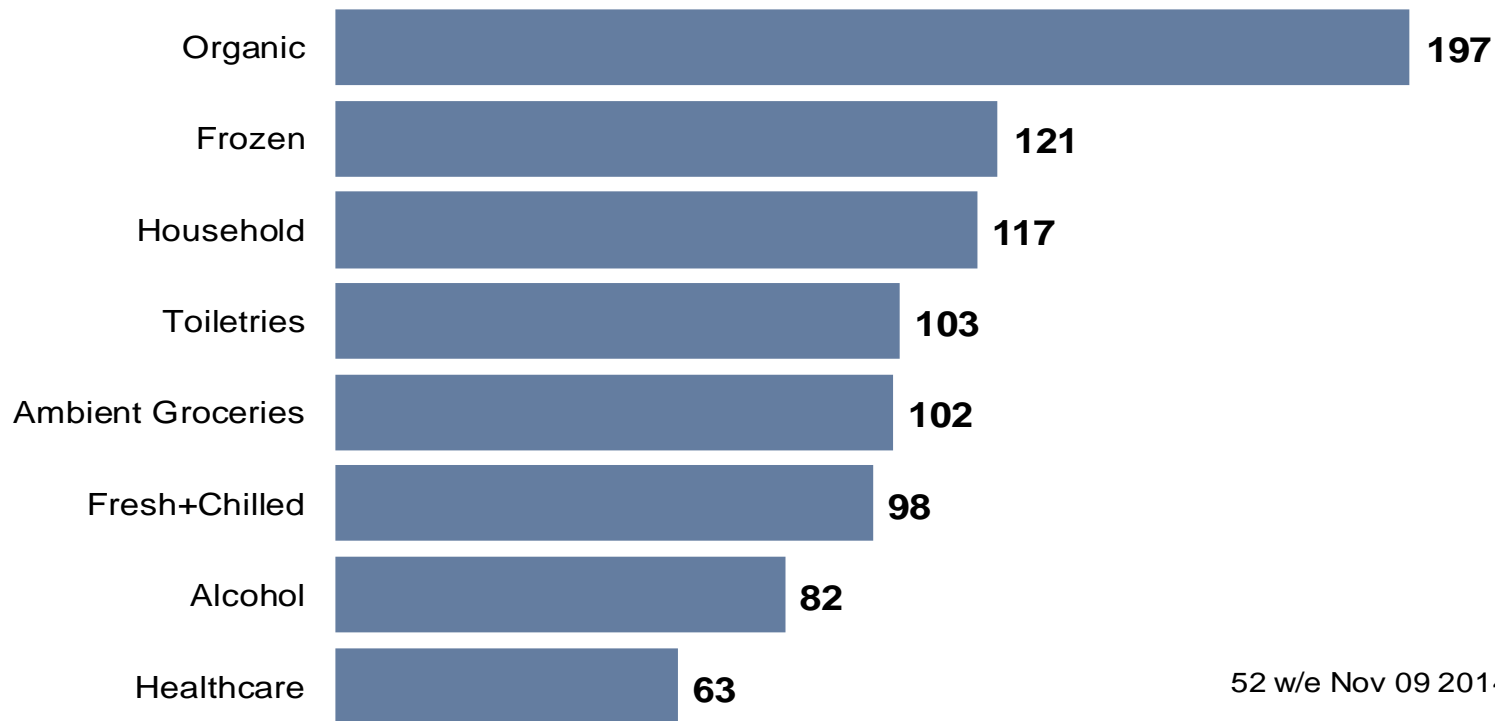


Till Roll - Duplication by Tesco Internet Buyers



12 w/e Dec 07 2014

Trading Index Internet Delivery



52 w/e Nov 09 2014

Chilled / Fresh



Frozen

BREAD & BAGELS

BREAKFAST

And Jumbo
Waffles
99¢



Chilled / Fresh



Frozen



Trading Index Internet Delivery



Carrefour
drive



carrefour.fr

bienvenue



Carrefour
drive



Drive Thru

ASDA.com

Click &
Collect



The Agenda

- External pressures
- The Squeeze
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- Beef Insights





In-store theatre

















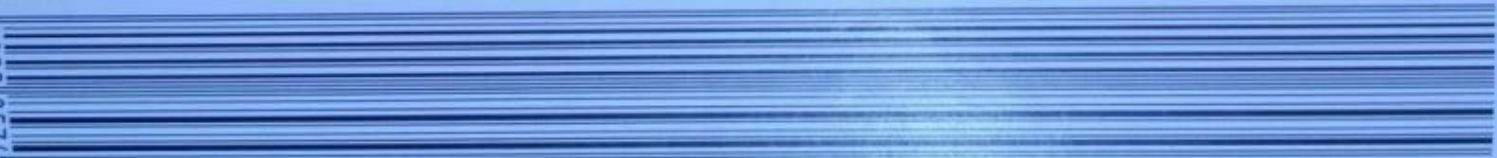






fal352-1412B

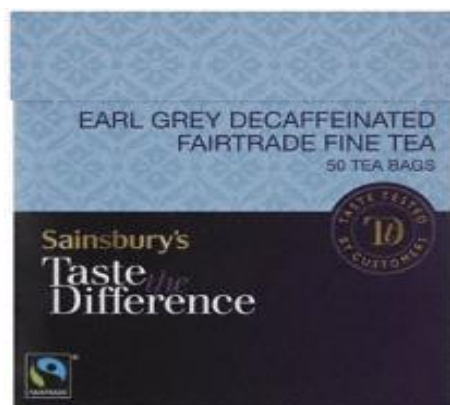
2000-8574



Own-label

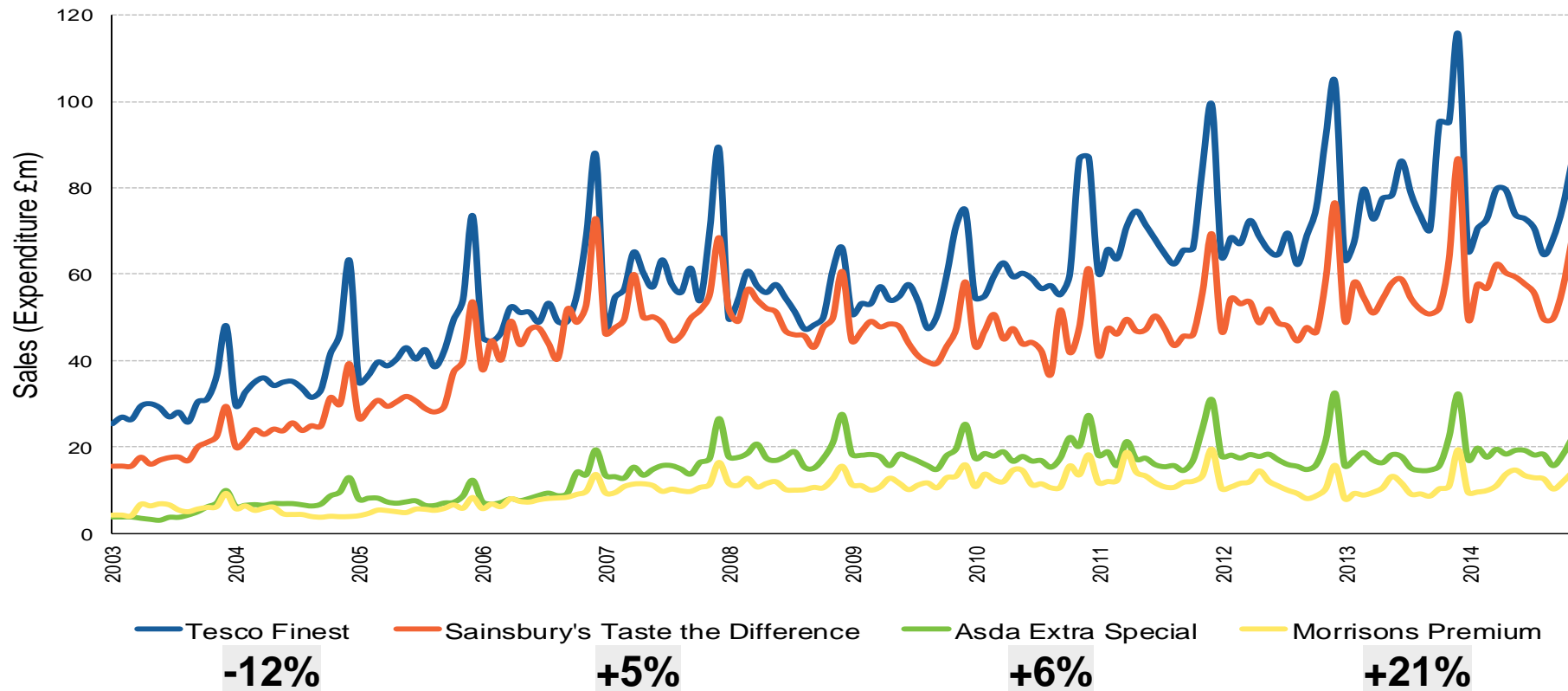






Premium Own-Label Sales Trends

Latest 12-wk % Change

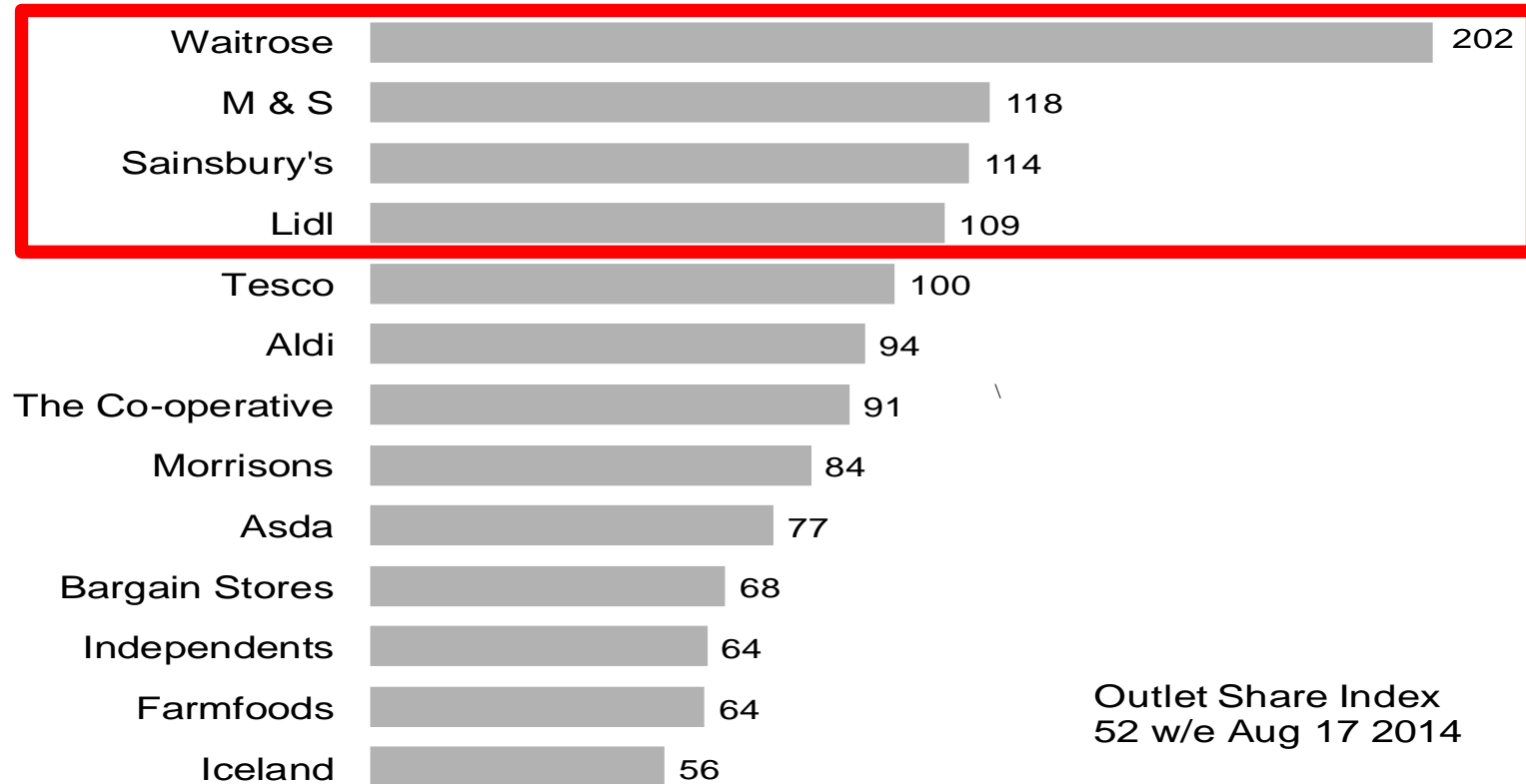


The Agenda

- External pressures
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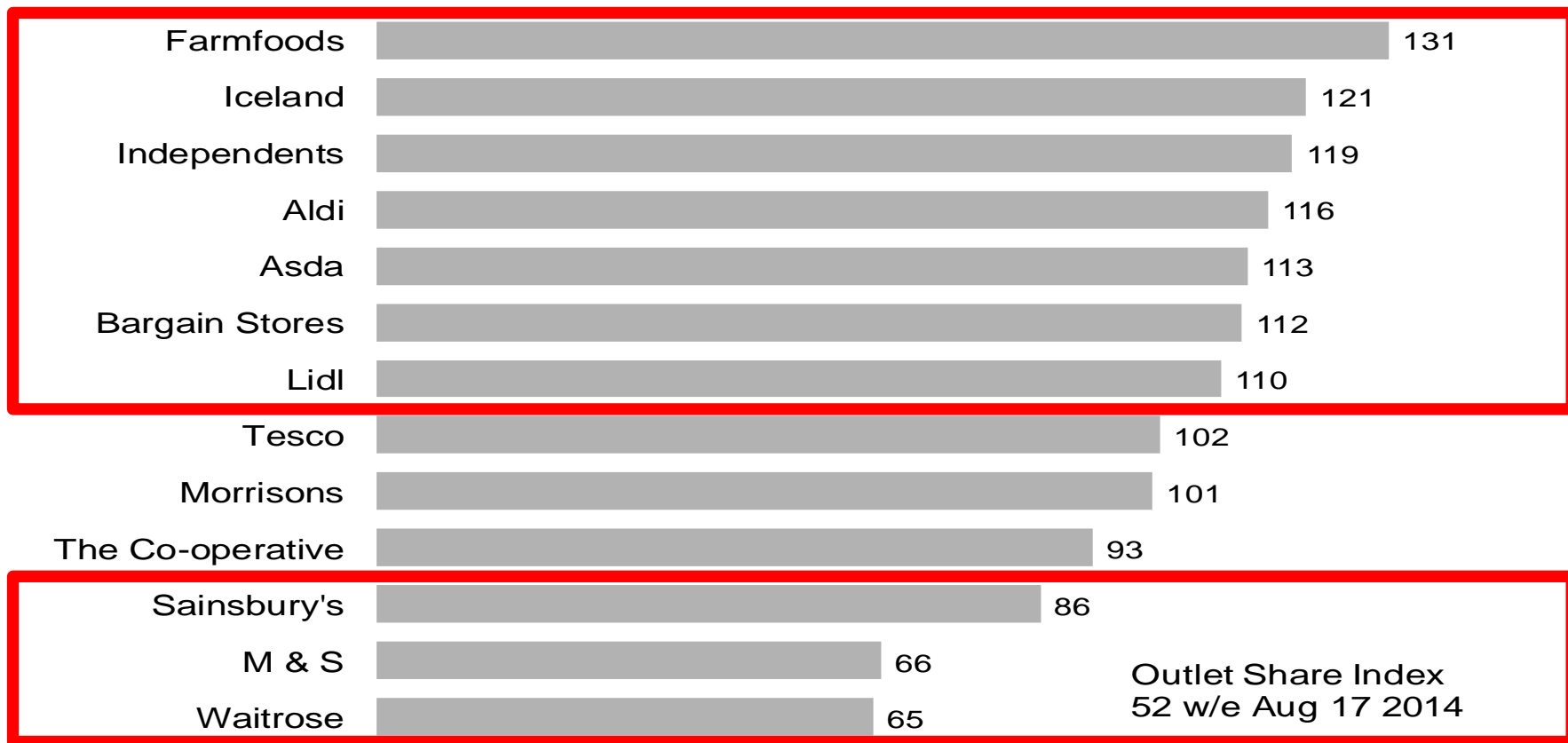


I regard myself as a connoisseur of food and wine



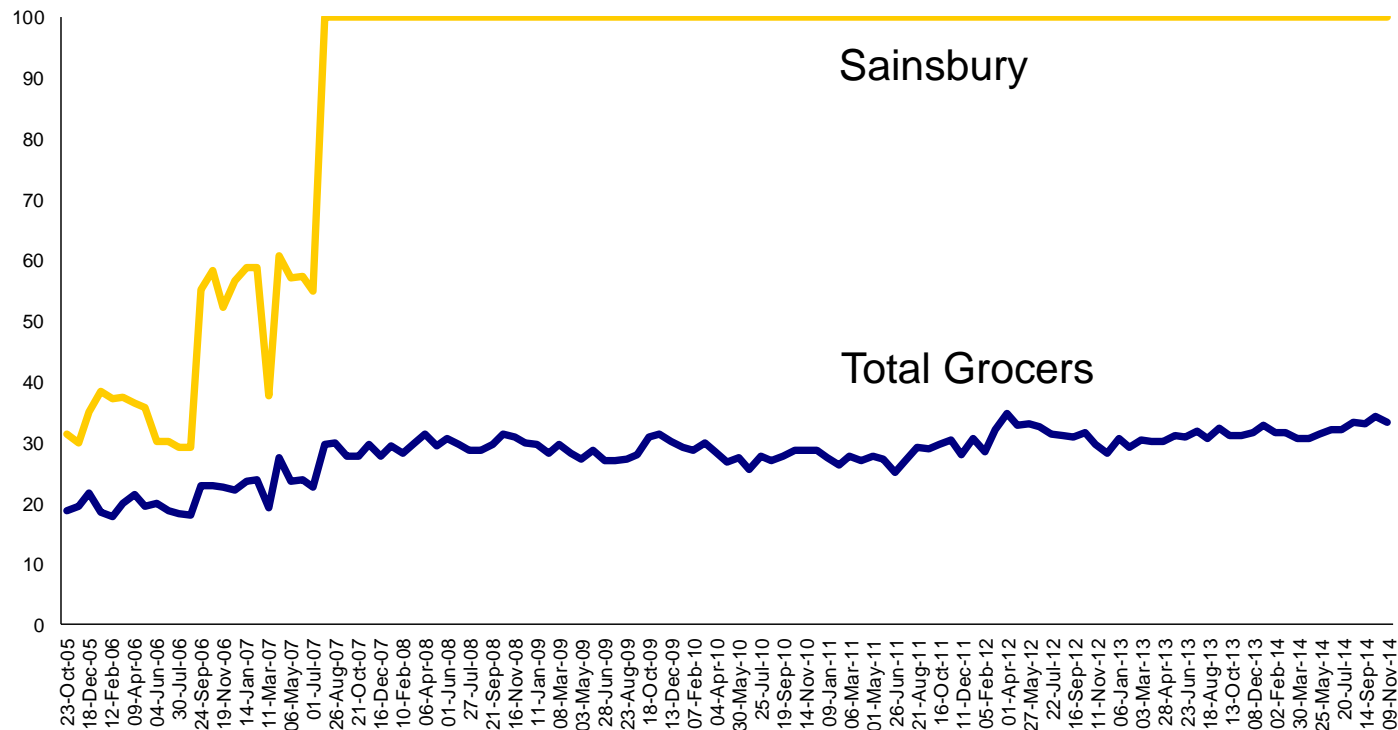
Outlet Share Index
52 w/e Aug 17 2014

I Consider That Price Is The Most Important Factor When Buying A Product



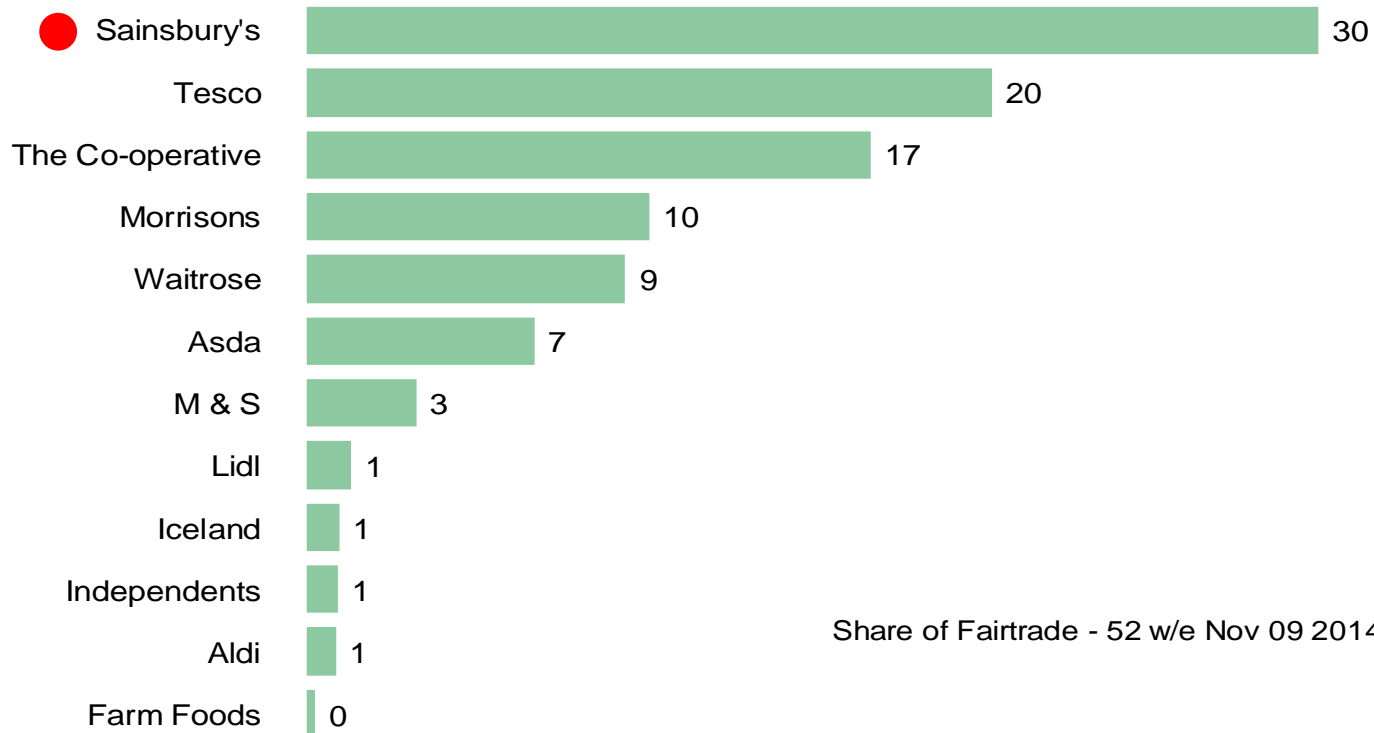


Fairtrade Prepacked Bananas Market Share



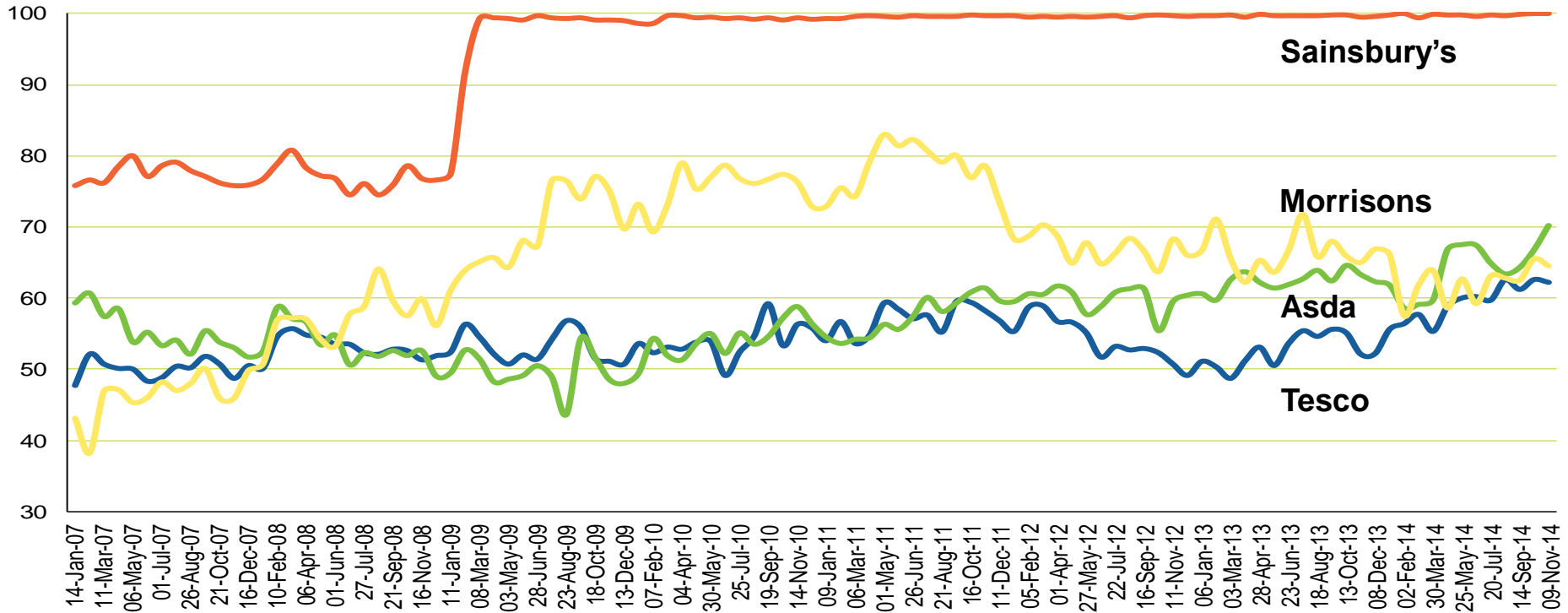


Fairtrade Shares

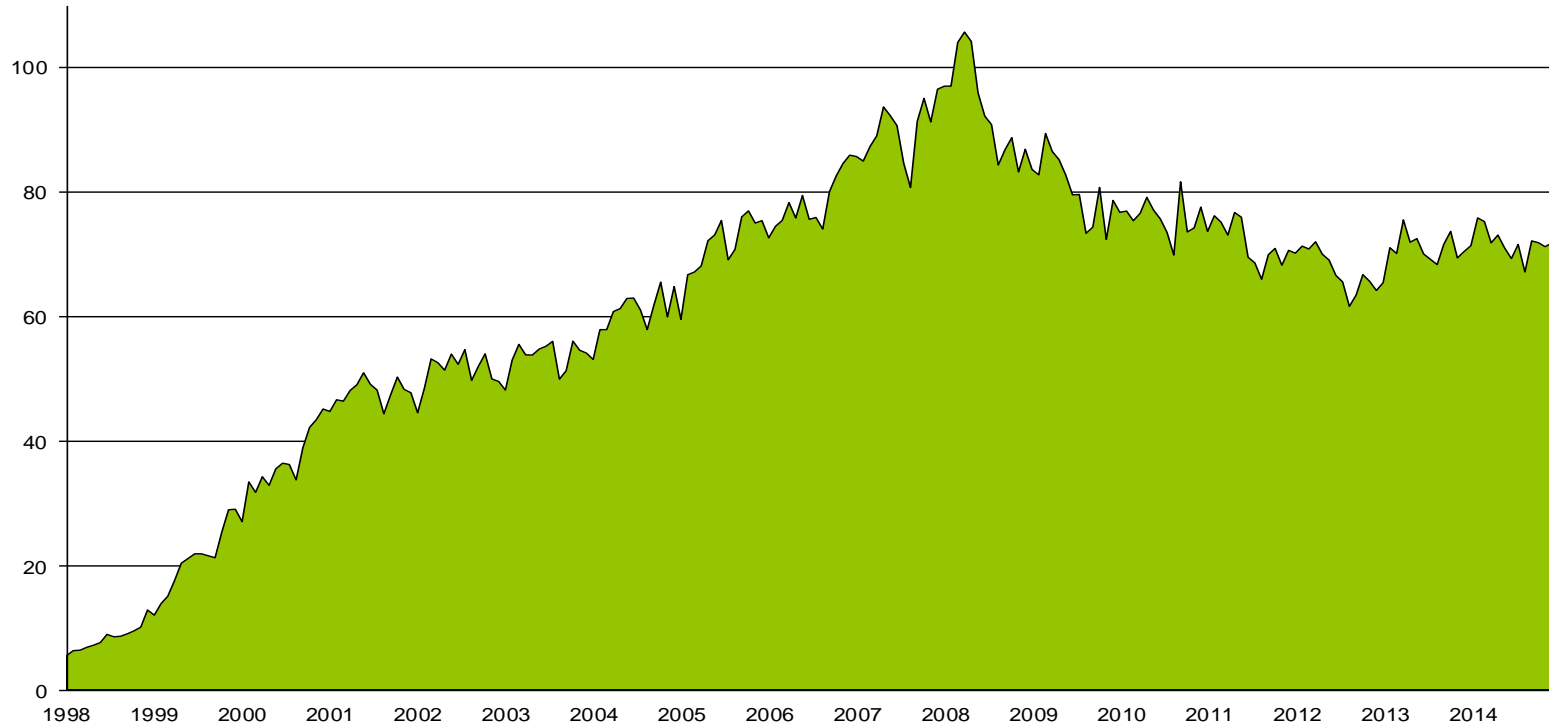


Share of Fairtrade - 52 w/e Nov 09 2014

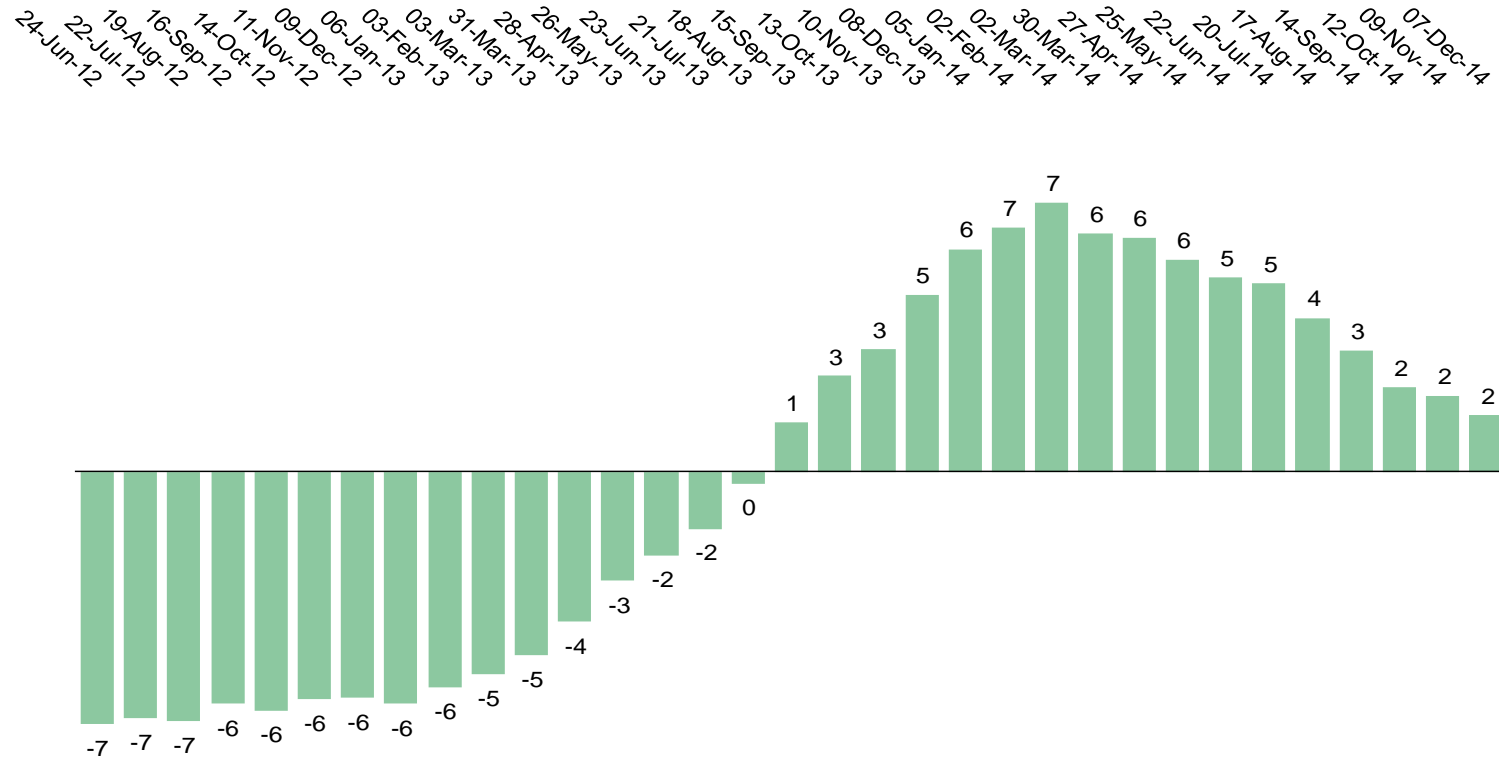
Not-Caged Eggs Market Share



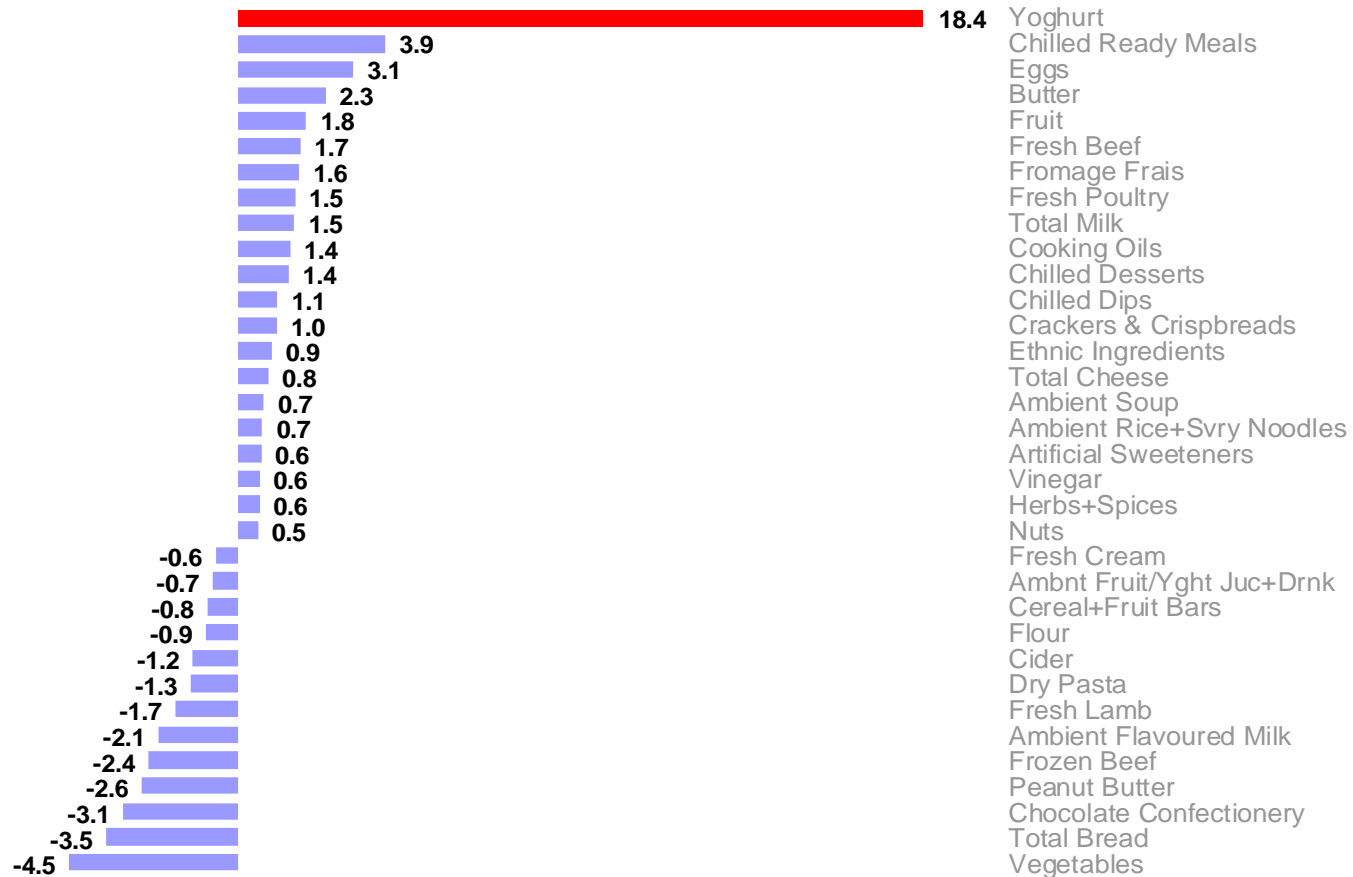
Total Organic Grocery Products including Baby - 4 weekly £m



Total Organic Market (inc. Baby) Rolling 52 week periods Y-on-Y Change %



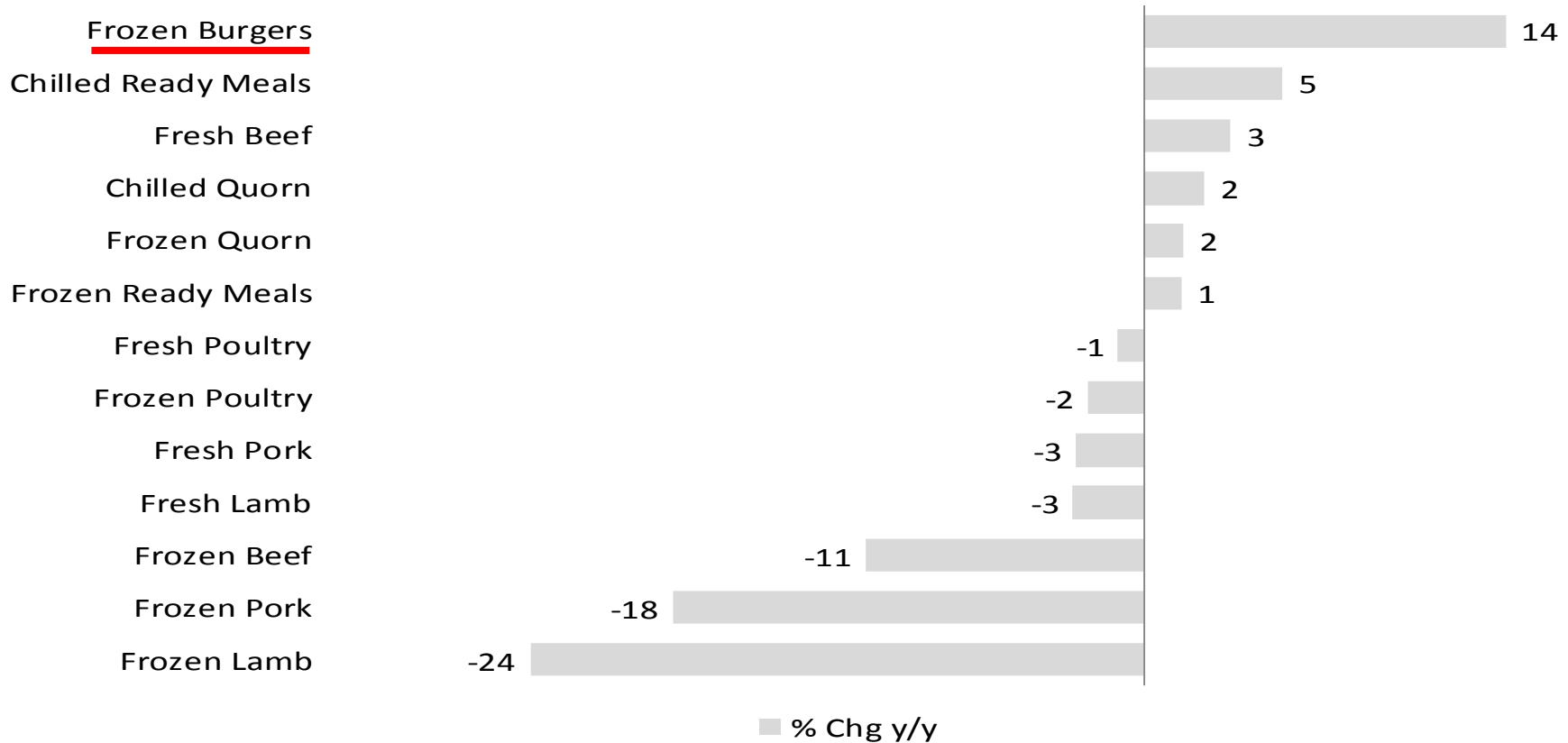
Organic Growth - £m - 52 w/e Nov 09 2014 v. year ago



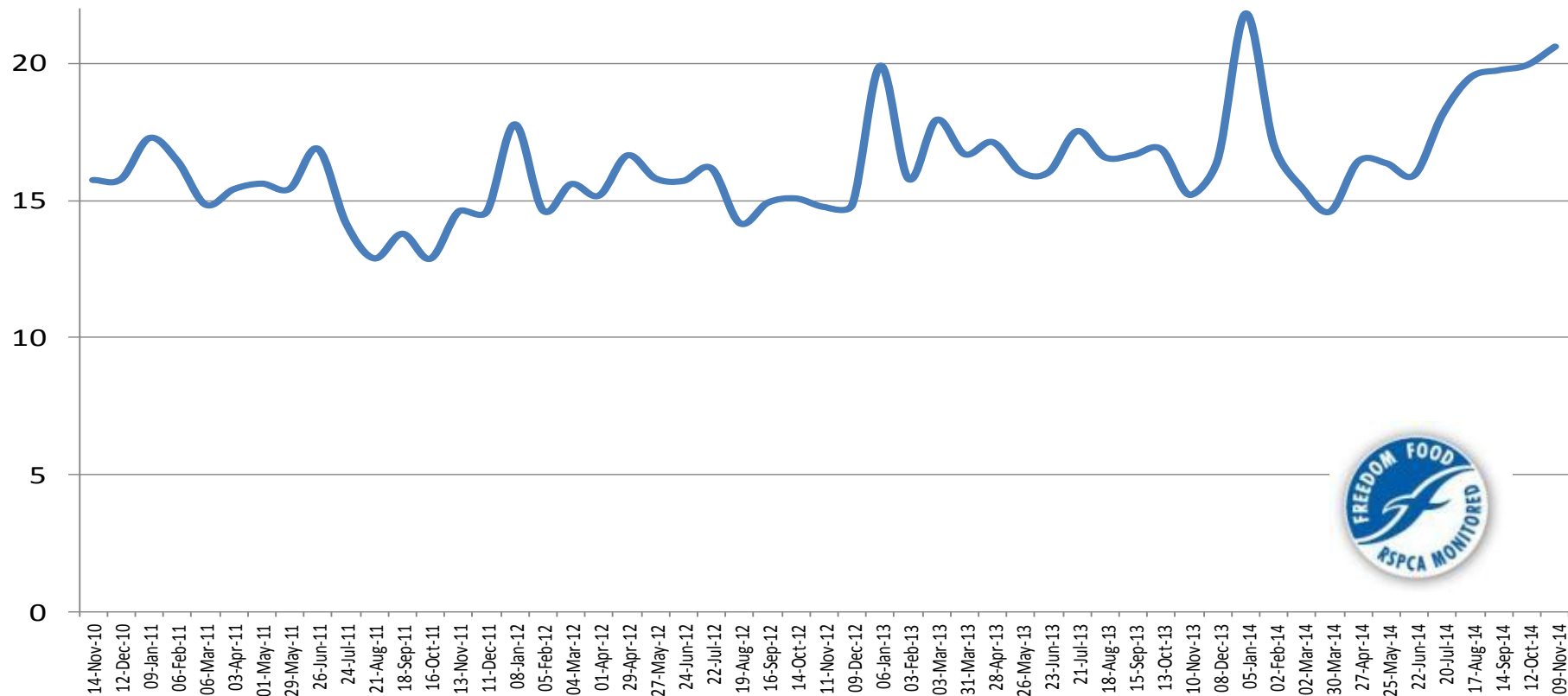
What happens when low prices rule the supply chain



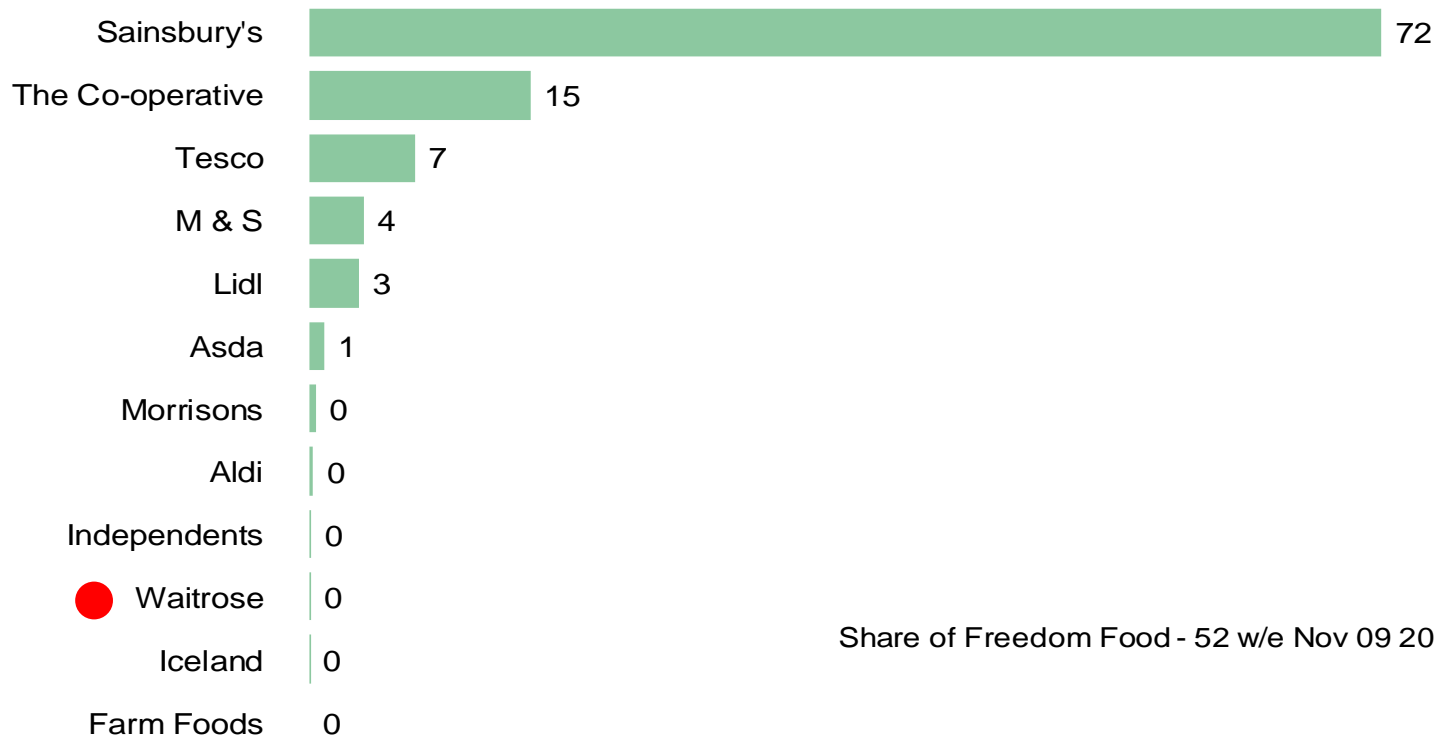
Impact of the Horsemeat Scandal - 52 w/e Dec 07 2014



Freedom Foods - 4 weekly sales - £m



Freedom Food Shares



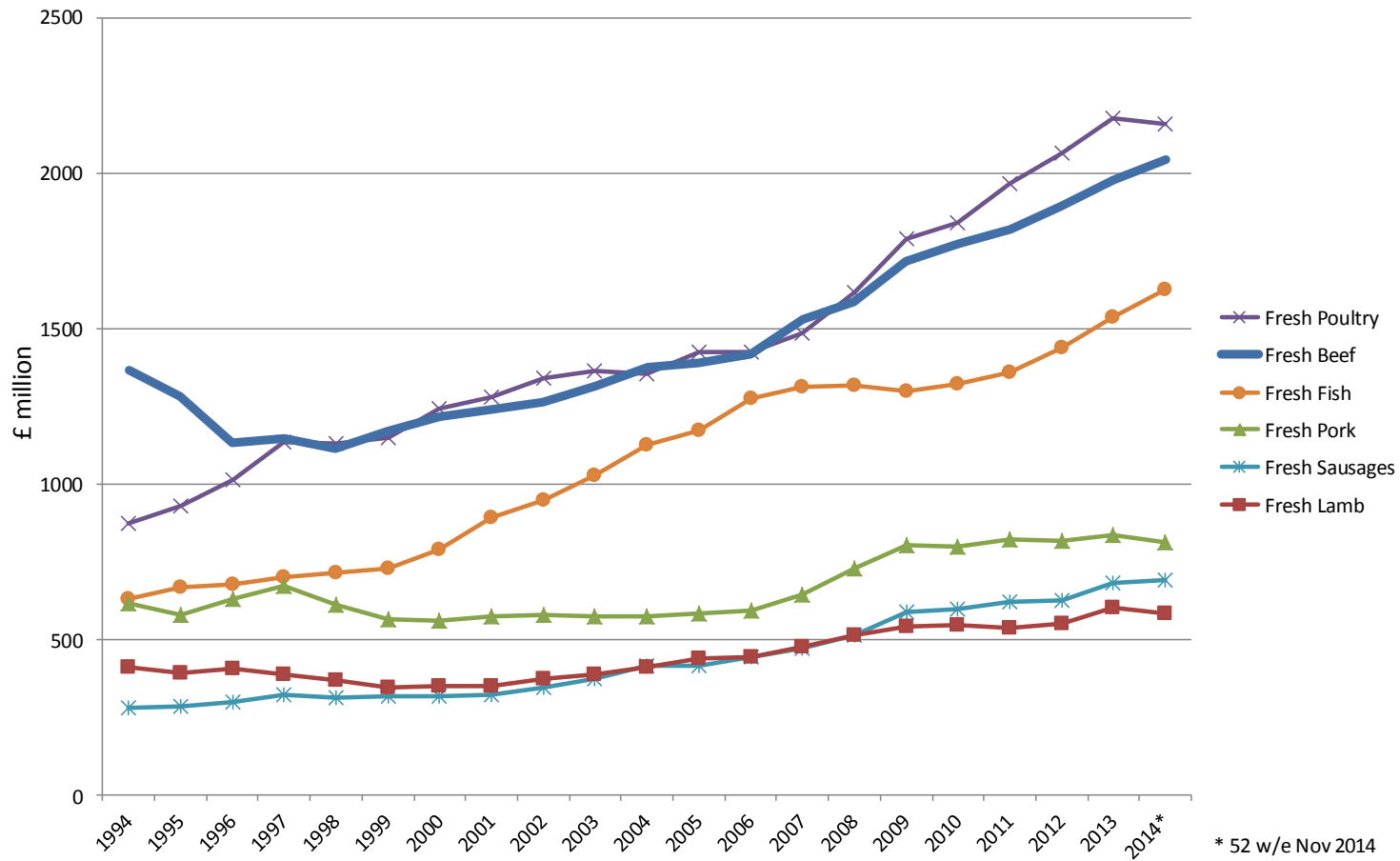
Share of Freedom Food - 52 w/e Nov 09 2014

The Agenda

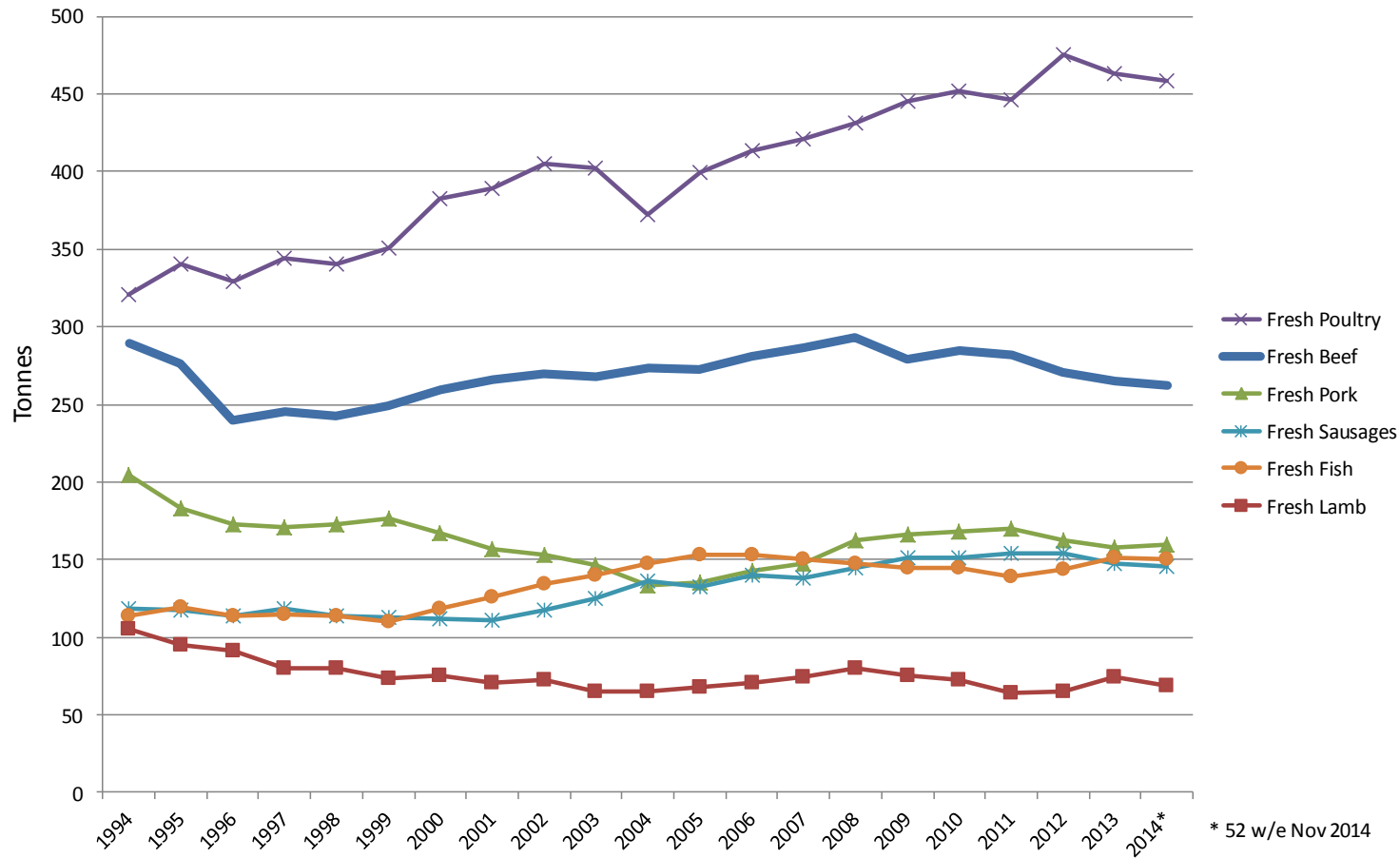
- External pressures
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Fresh Proteins - GB Value Sales

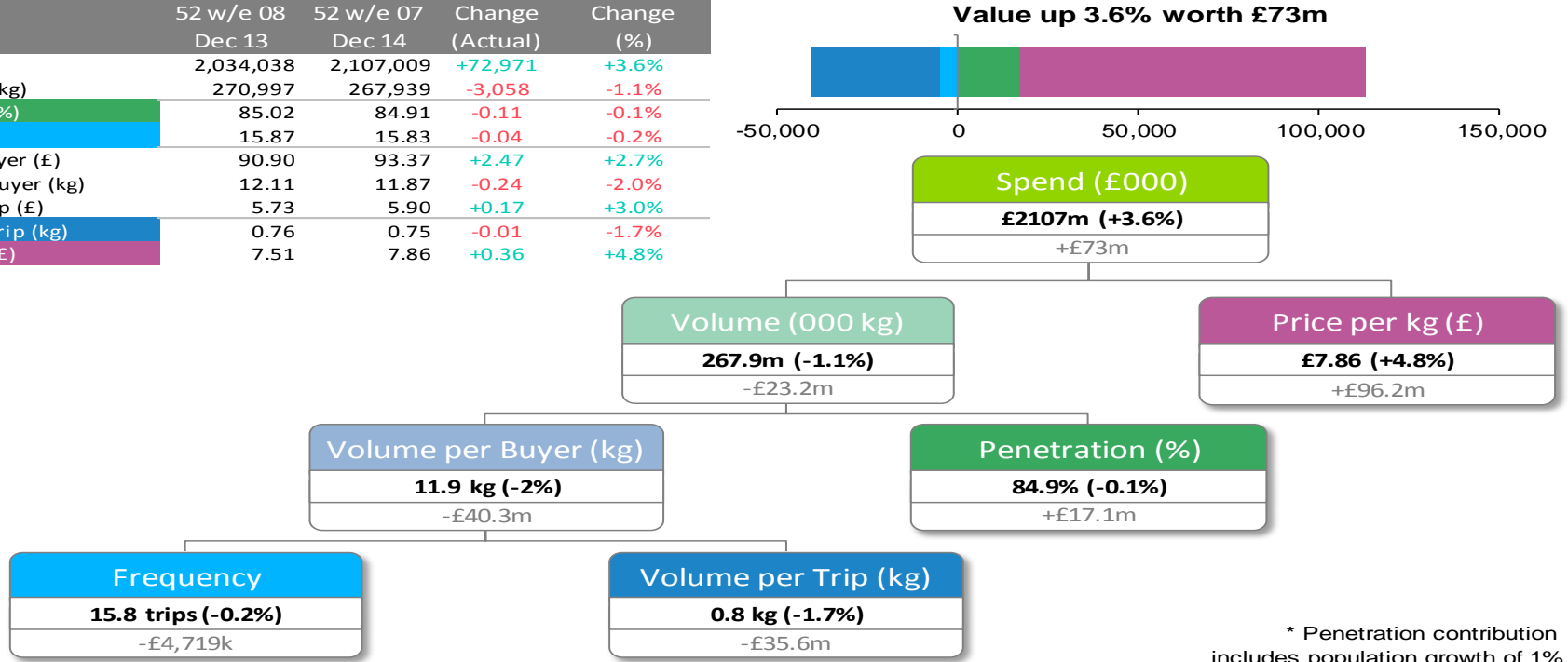


Fresh Proteins - GB Volume Sales



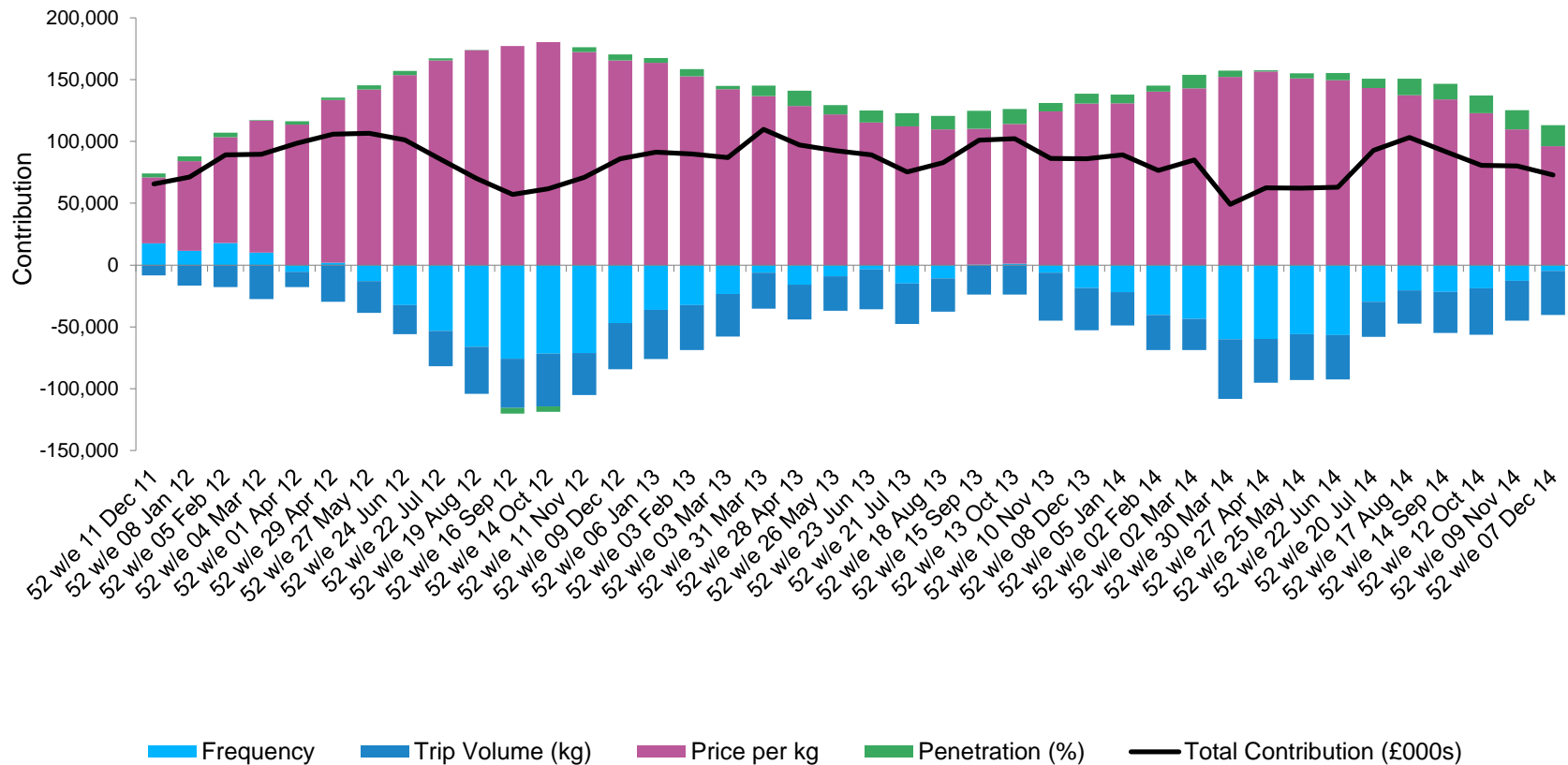
Total Fresh Beef Measure Tree

Measure	52 w/e 08 Dec 13	52 w/e 07 Dec 14	Change (Actual)	Change (%)
Spend (£000)	2,034,038	2,107,009	+72,971	+3.6%
Volume (000 kg)	270,997	267,939	-3,058	-1.1%
Penetration (%)	85.02	84.91	-0.11	-0.1%
Frequency	15.87	15.83	-0.04	-0.2%
Spend per Buyer (£)	90.90	93.37	+2.47	+2.7%
Volume per Buyer (kg)	12.11	11.87	-0.24	-2.0%
Spend per Trip (£)	5.73	5.90	+0.17	+3.0%
Volume per Trip (kg)	0.76	0.75	-0.01	-1.7%
Price per kg (£)	7.51	7.86	+0.36	+4.8%



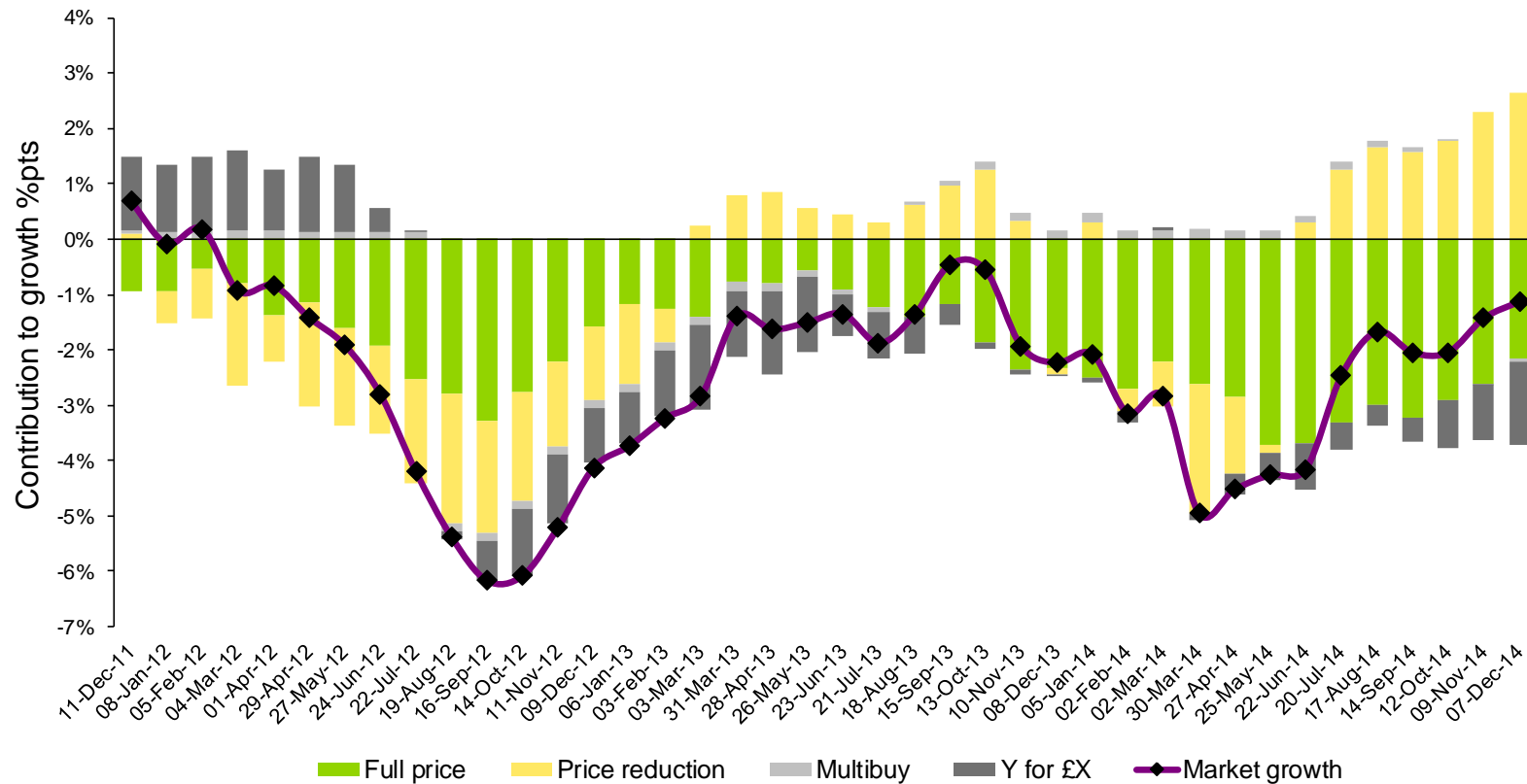
* Penetration contribution includes population growth of 1%

Fresh Beef - Rolling 52we Measure Tree



PROMOTIONAL MECHANICS CONTRIBUTION TO GROWTH

Total Fresh Beef - Volume



Beef -

Trading Indices

	52 w/e 12 Dec 10	52 w/e 11 Dec 11	52 w/e 09 Dec 12	52 w/e 08 Dec 13	52 w/e 07 Dec 14
--	---------------------	---------------------	---------------------	---------------------	---------------------

Total Grocers	100	100	100	100	100
● Tesco	99	99	97	94	90
Asda	94	92	86	88	92
Sainsbury's	122	119	120	119	117
Morrisons	138	136	139	141	142
Waitrose	122	115	124	120	121
● The Co-operative	80	85	75	72	66
Iceland	58	56	72	72	73
Farm Foods	4	2	2	15	23
● Aldi	45	72	94	104	117
● Lidl	78	99	97	110	120
M & S	51	57	59	61	54
Independents	13	11	18	19	27

Beef -

Outlet Shares £%

	52 w/e 12	52 w/e 11	52 w/e 09	52 w/e 08	52 w/e 07
	Dec 10	Dec 11	Dec 12	Dec 13	Dec 14
Total Grocers	100	100	100	100	100
● Tesco	30.9	30.7	29.8	28.2	25.9
Asda	16.1	15.7	15.1	15.1	15.8
Sainsbury's	20.1	19.6	20.0	19.9	19.4
Morrisons	16.7	16.6	16.5	16.3	15.7
● Waitrose	5.1	5.0	5.6	5.8	6.1
● The Co-operative	6.0	5.9	4.9	4.6	4.1
Iceland	1.1	1.1	1.5	1.5	1.5
Farmfoods	0.0	0.0	0.0	0.1	0.2
● Aldi	0.9	1.7	2.7	3.8	5.5
● Lidl	1.8	2.5	2.6	3.3	4.2
M & S	2.9	3.2	3.4	3.5	3.1
Independents	0.3	0.2	0.4	0.4	0.5
Costco	0.7	0.6	0.9	0.8	1.0

GROWTH:

Aldi +30%

Lidl +20%

Waitrose +6%

Tesco Finest -12%

Sainsbury's TTD +5%

Branded Organic +8%

Internet +15%



KANTAR WORLD PANEL

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