



# UK RETAIL SEMINAR

## Wednesday, 11<sup>th</sup> February 2015

Growing the success of Irish food & horticulture

***Bord Bia***  
Irish Food Board

# **UK RETAIL SEMINAR**

## **Wednesday, 11<sup>th</sup> February 2015**

**Michelle Butler**  
**Bord Bia**

*Welcome*

# Agenda

- ✓ **9.30am** - Welcome, Michelle Butler, Manager Bord Bia London Office.
- ✓ **9.45am** - UK retail market overview 2014, Ed Garner, **Kantar Worldpanel**.
- ✓ **10.15am** - UK Consumer insights & current trends, Grace Binchy, **Bord Bia**.
- ✓ **10.45am** - Managing Currency Opportunities & Risks - **AIB**
- ✓ **11.00am** - Refreshments
- ✓ **11.15am** - How to distribute to the UK , Dean Attwell, Managing Director **Oakland-International**,
- ✓ **11.45am** - Sainsbury's & how to supply successfully - Michael Hodgson, Head of Central Buying, **Sainsbury's Supermarkets Ltd**.
- ✓ **12.15pm** - How to position your business to take advantage of export opportunities – Joe Manning, Senior Buyer, **Tesco Ireland**
- ✓ **12.45pm** - Supplying the UK retail market - An Irish suppliers' perspective - **Clonakilty Black Pudding Co**.
- ✓ **13.15pm** - Questions & Answers
- ✓ **13.30pm** - Light lunch & networking opportunity.

Growing the success of Irish food & horticulture

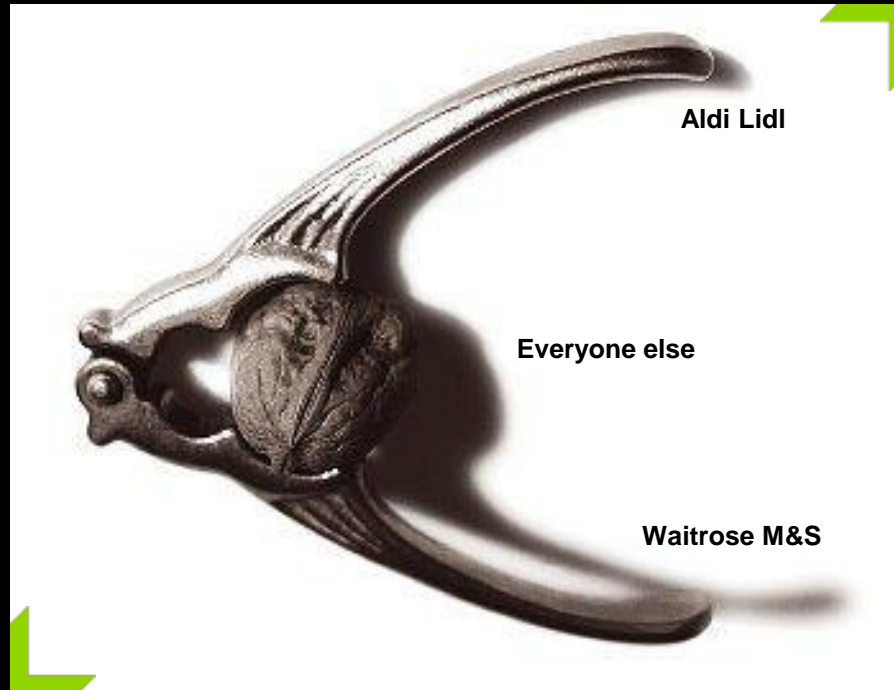
# KANTAR WORLDpanel High definition inspiration



UK Retail & Consumer Outlook  
Edward Garner - Communications Director



# KANTAR WORLD PANEL High definition inspiration



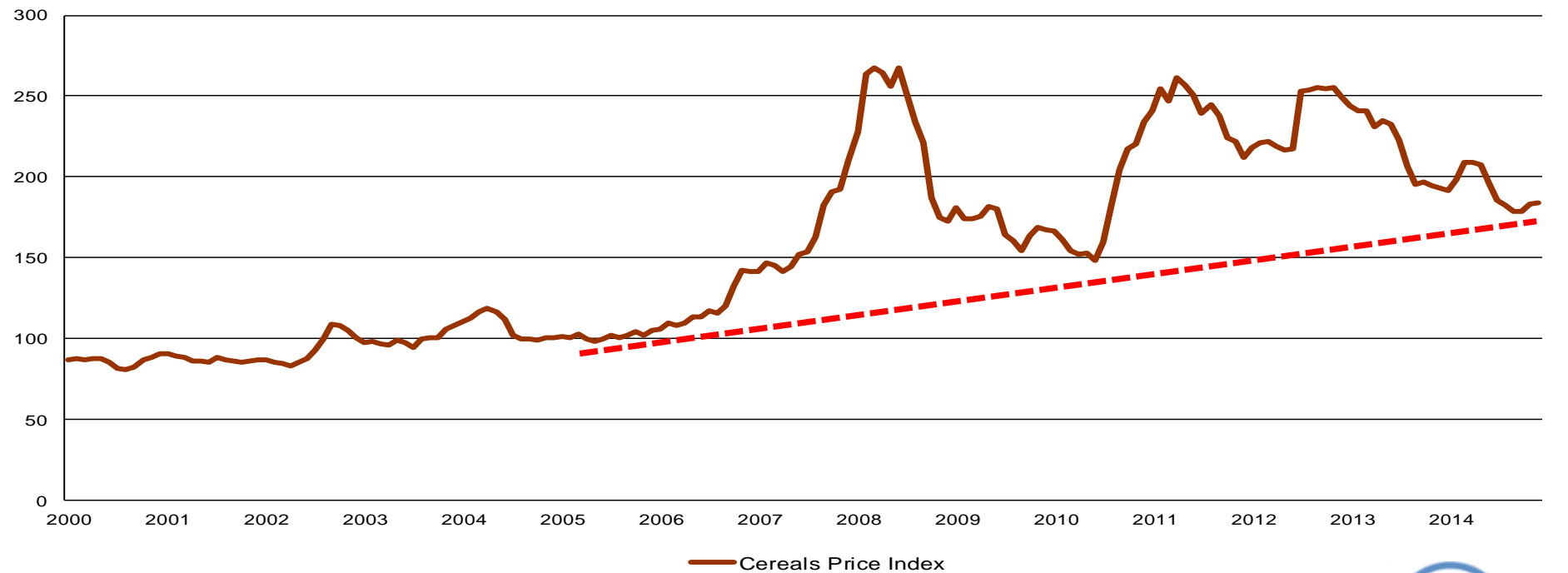
UK Retail & Consumer Outlook  
Edward Garner - Communications Director

# The Agenda

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



# Global Food Price Indices



Food Price Index, UN FAO



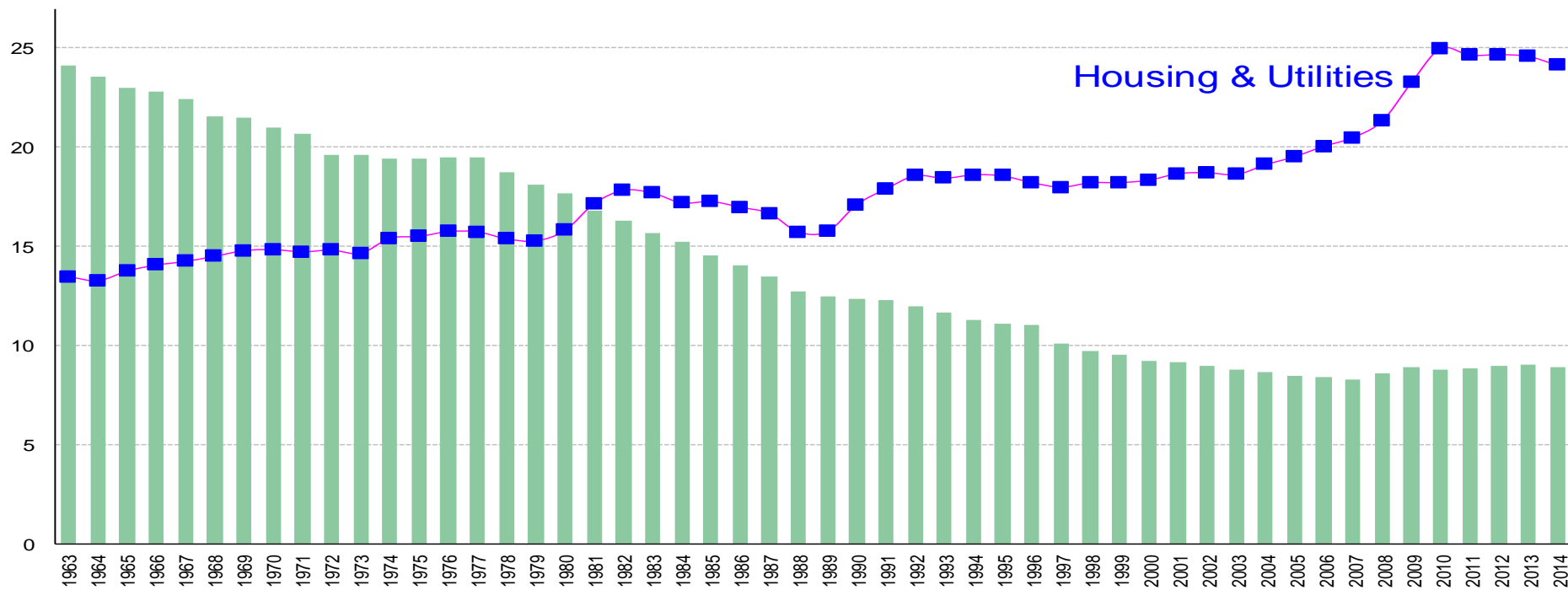
## Food and Drink as a Proportion of UK Household Expenditure %



Source: ONS Series ABQI / ABZV

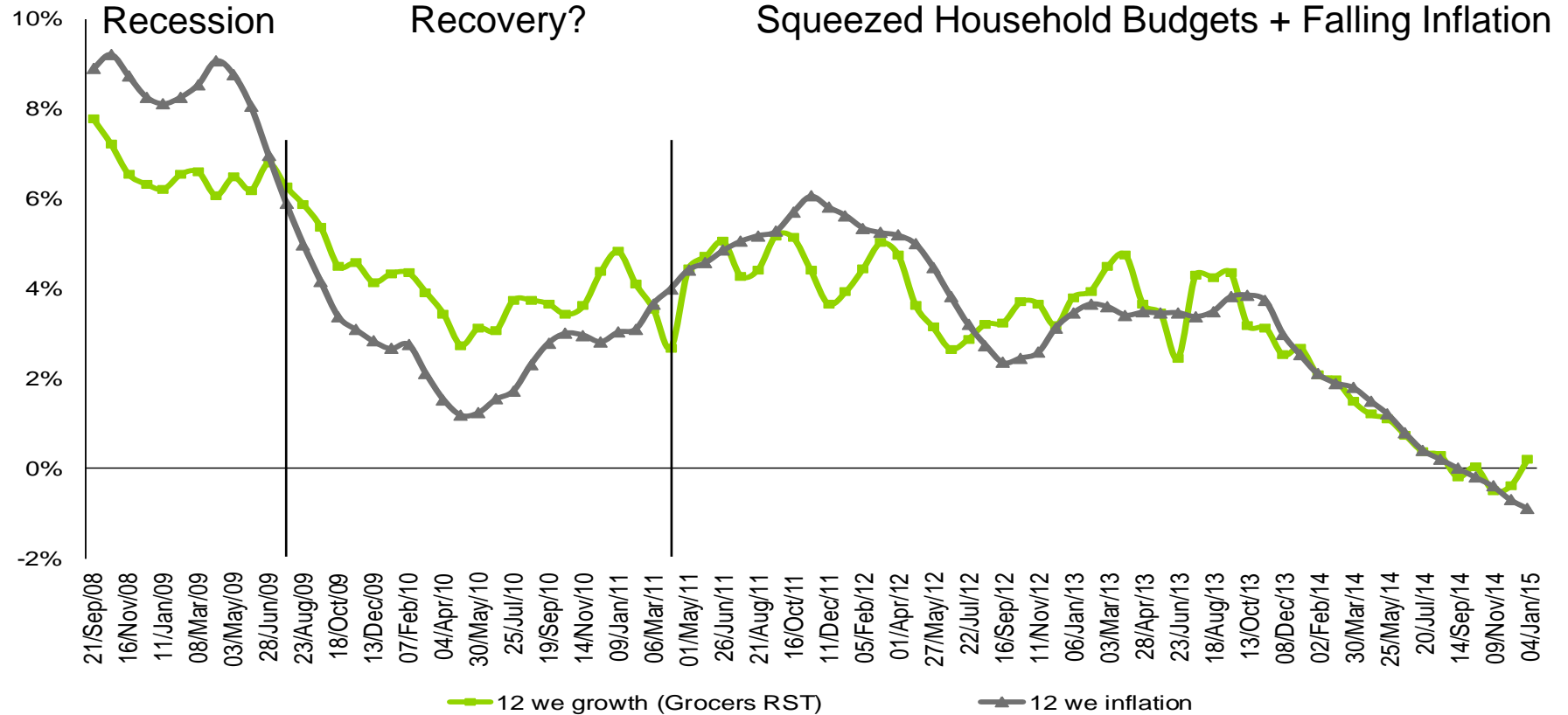


## Food and Drink as a Proportion of UK Household Expenditure %

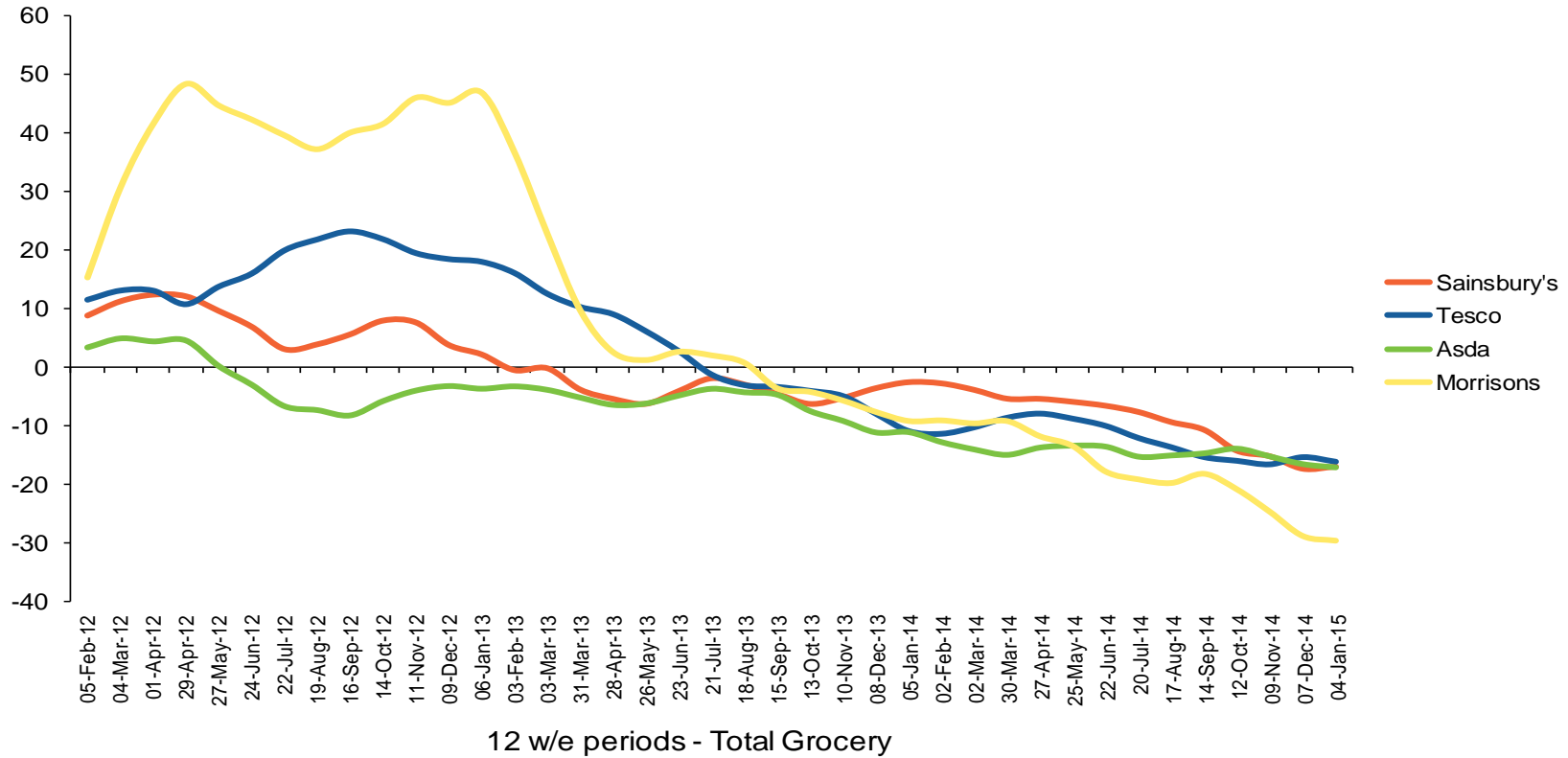


Source: ONS Series ABQI / ABZV

# Grocery Market Growth v. Inflation



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

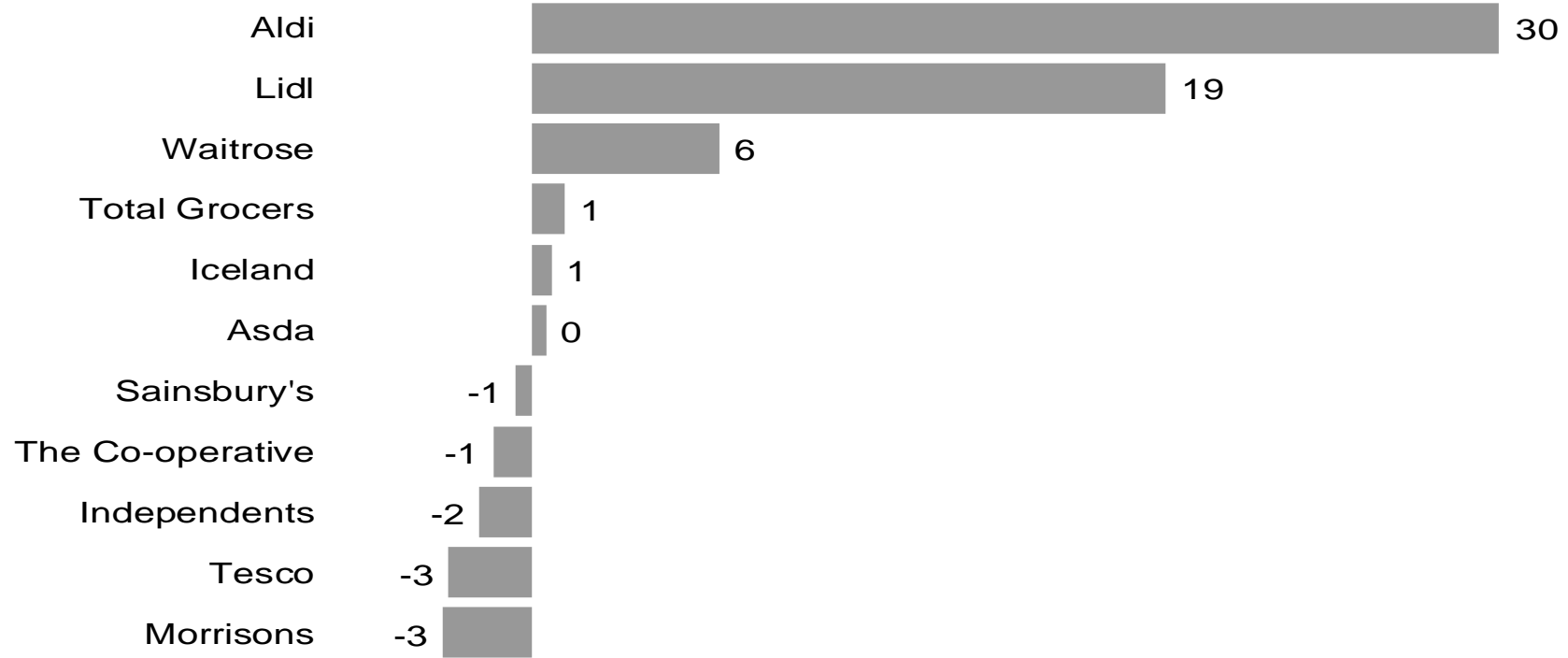


# The Agenda

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

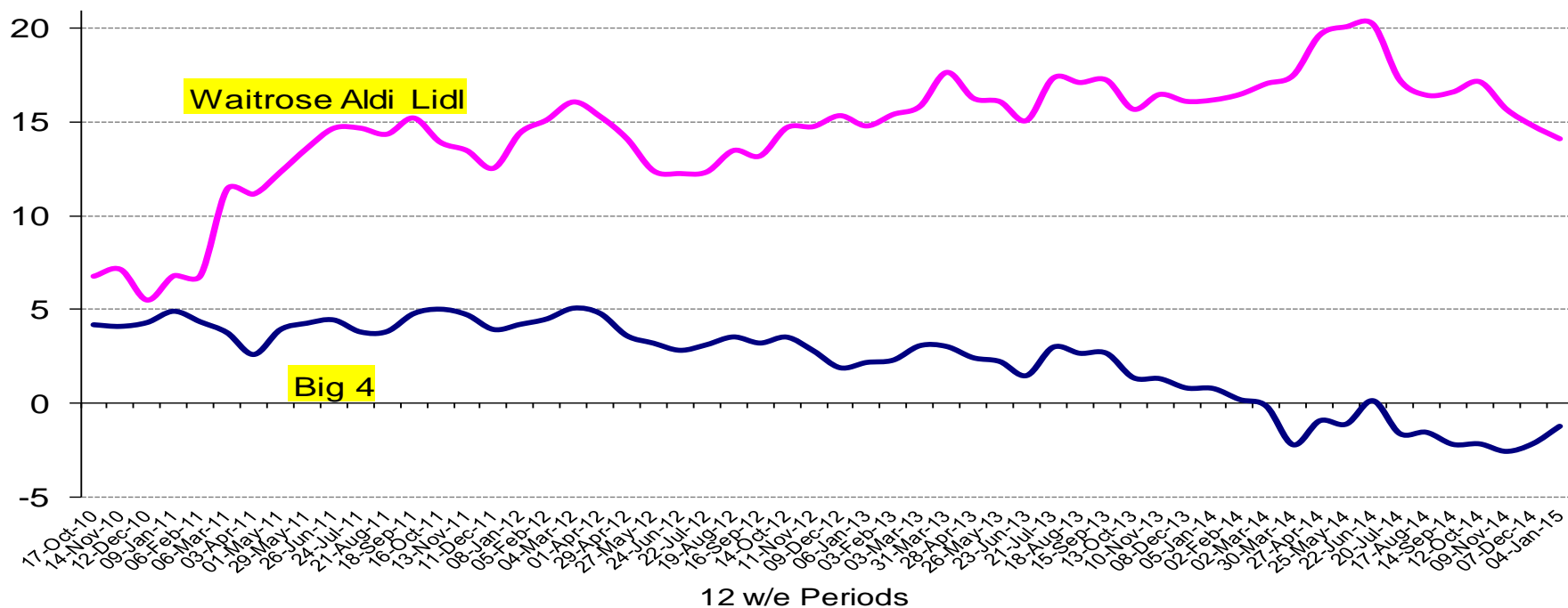


## Annual Till Roll Totals Expenditure Trends



52 w/e Jan 04 2015 y/y % Change

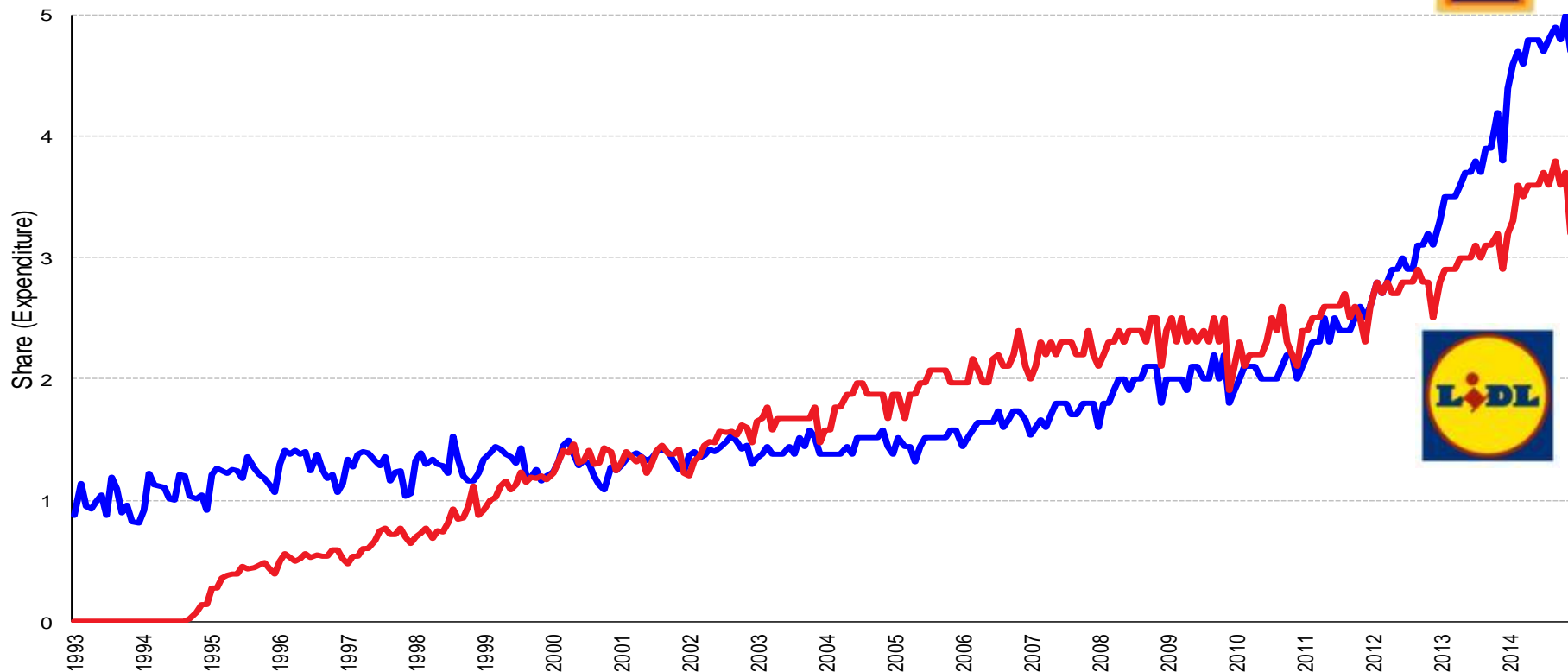
# Till Roll Annual Growth Rates



# 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

**£1.49**  
3 x 100g



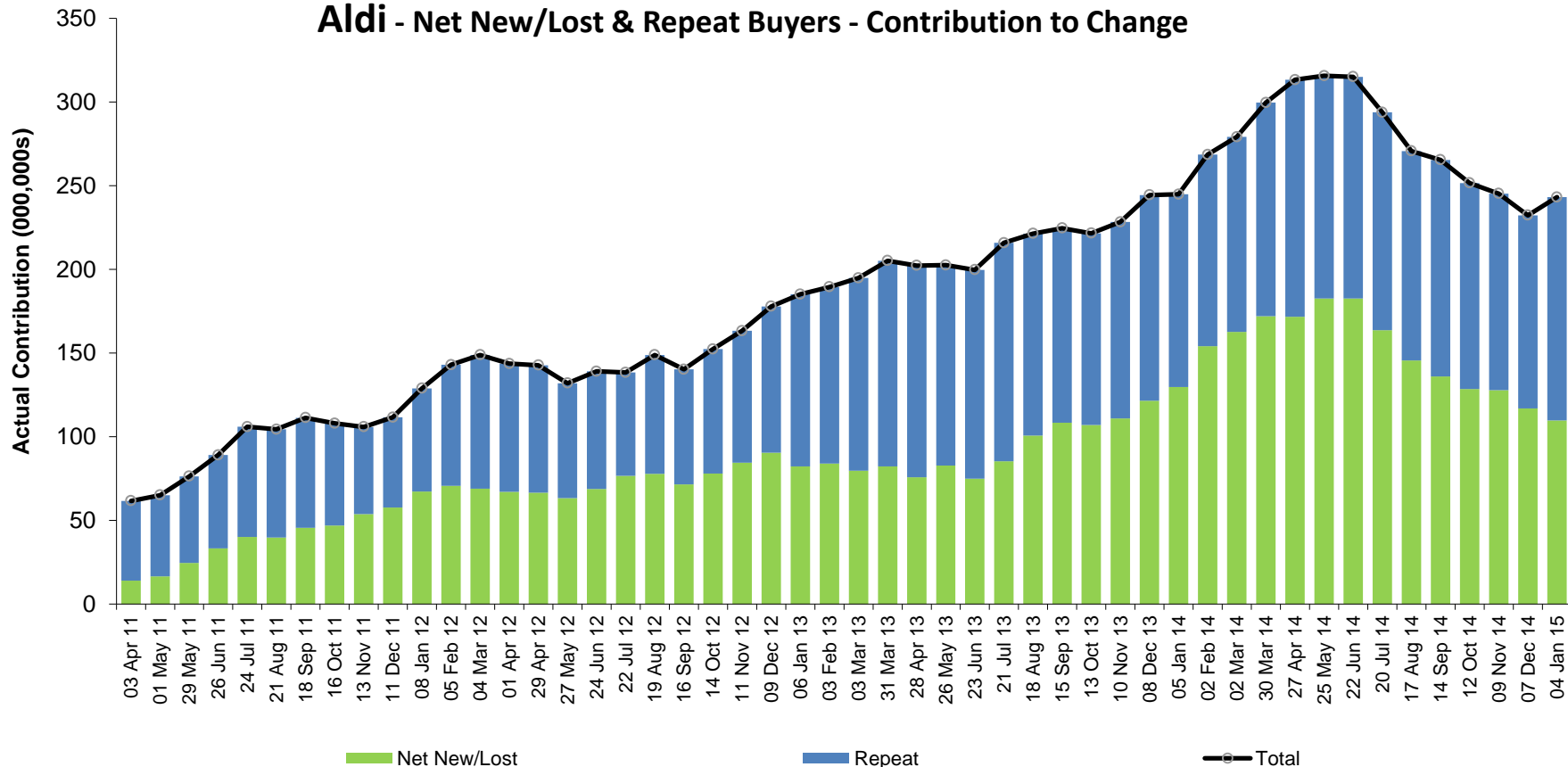
Get the latest Aldi Specialbuys on your phone with our free app

aldi.co.uk

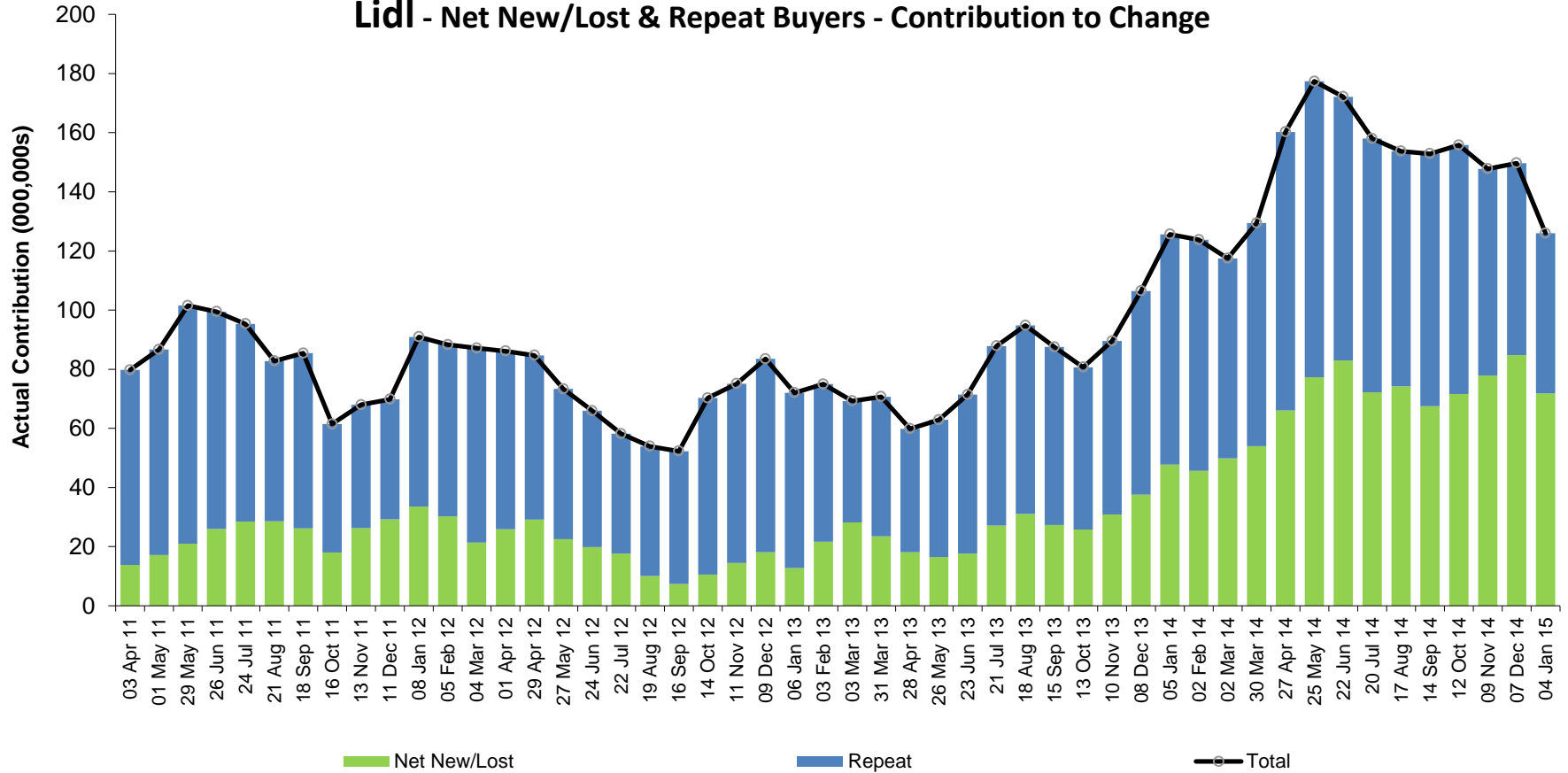


Products shown are only available pre-packaged in store.  
Deli counter not available in store. Subject to availability. Products may vary in N.I.

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

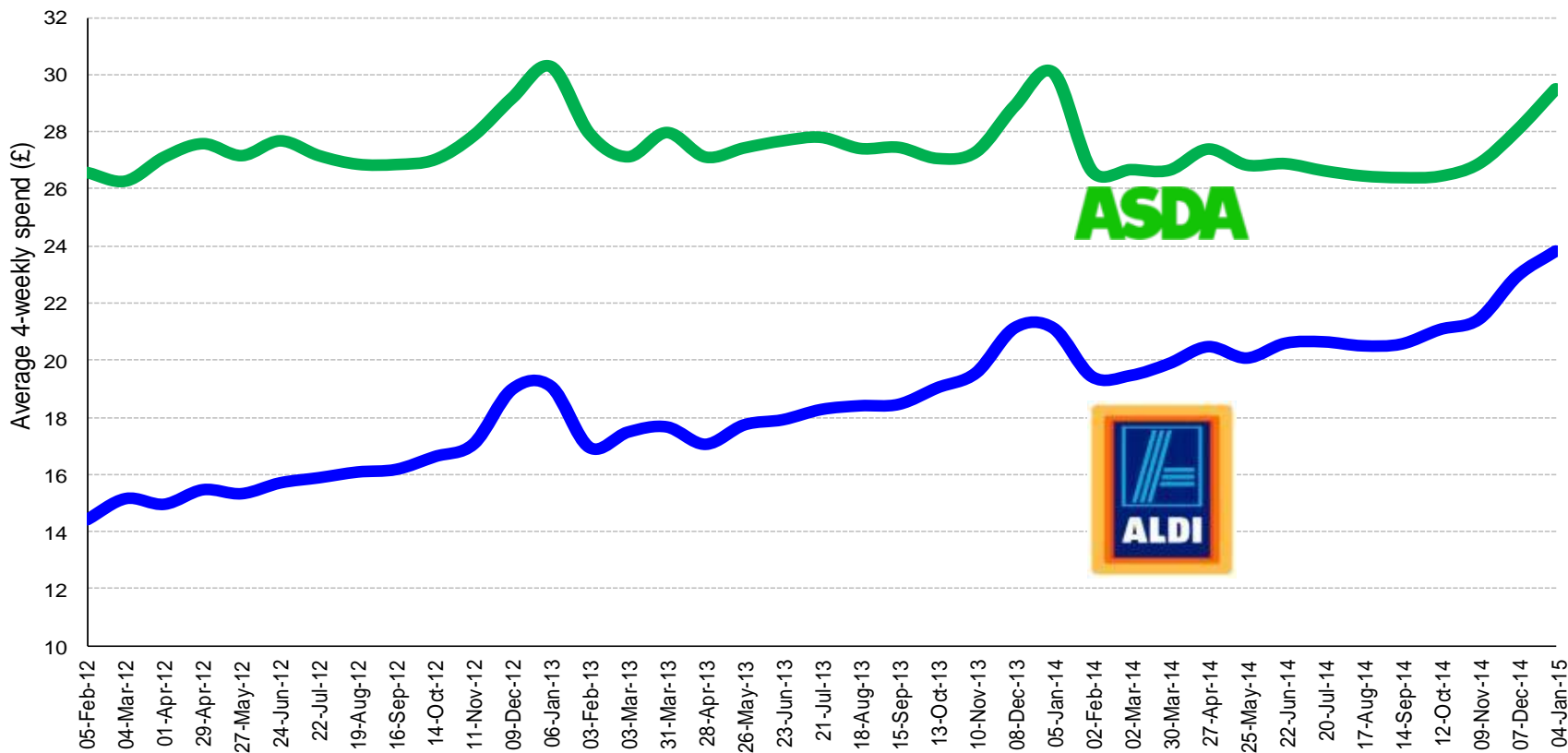


# Lidl - Net New/Lost & Repeat Buyers - Contribution to Change





# Spend per Visit (Basket Size) Trends



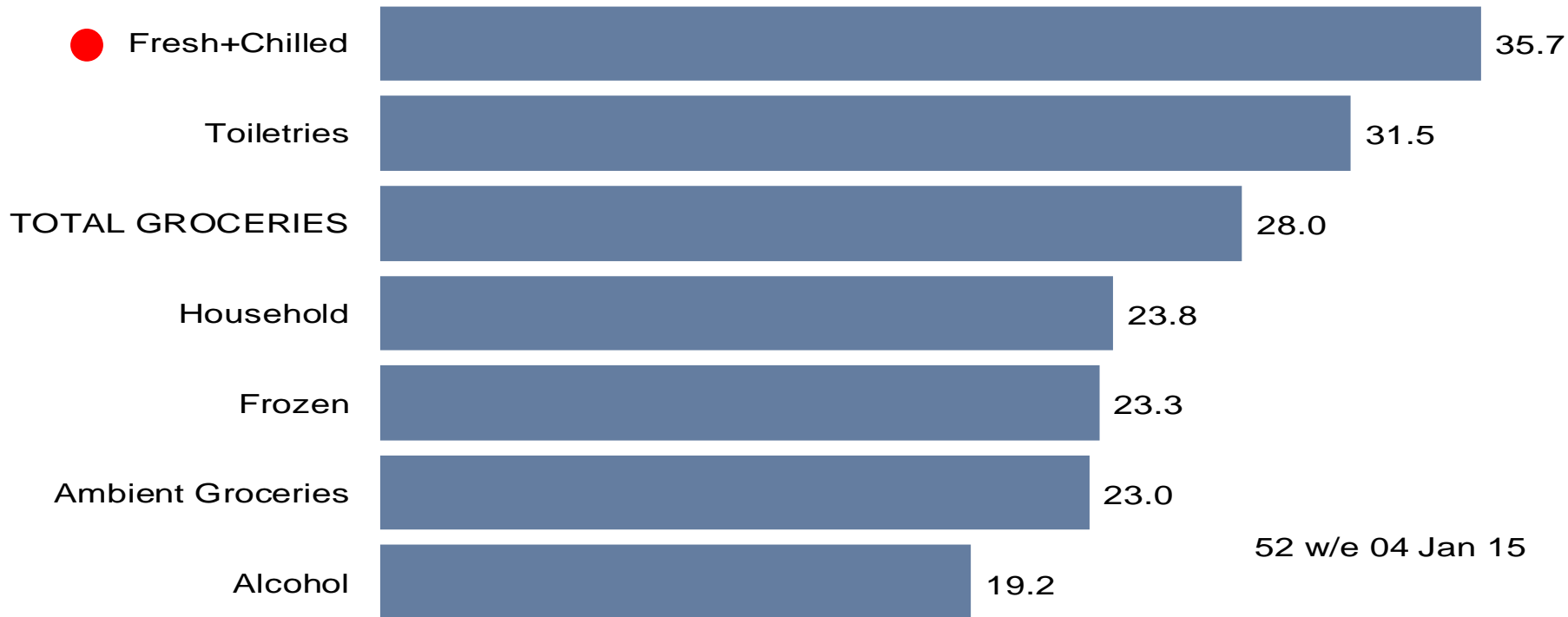
|                                |            |
|--------------------------------|------------|
| <b>Frozen Poultry+Game</b>     | <b>229</b> |
| <b>Frozen Fish</b>             | <b>152</b> |
| ● <b>Fruit+Veg+Salads</b>      | <b>129</b> |
| <b>Packet Breakfast</b>        | <b>128</b> |
| <b>Fresh Poultry+Game</b>      | <b>125</b> |
| <b>Biscuits</b>                | <b>120</b> |
| <b>Fresh Meat</b>              | <b>117</b> |
| <b>Canned Goods</b>            | <b>111</b> |
| <b>Sweet Home Cooking</b>      | <b>109</b> |
| <b>Ambient Bakery Products</b> | <b>107</b> |
| <b>Frozen Confectionery</b>    | <b>106</b> |
| <b>Take Home Savouries</b>     | <b>106</b> |



|   |                                 |            |
|---|---------------------------------|------------|
| ● | <b>Fruit+Veg+Salads</b>         | <b>144</b> |
| ● | <b>Fresh Poultry+Game</b>       | <b>137</b> |
| ● | <b>Fresh Meat</b>               | <b>134</b> |
|   | <b>Frozen Poultry+Game</b>      | <b>133</b> |
|   | <b>Sweet Home Cooking</b>       | <b>130</b> |
|   | <b>Frozen Fish</b>              | <b>123</b> |
|   | <b>Frozen Confectionery</b>     | <b>122</b> |
|   | <b>Pickle+Tbl Sce+Condiment</b> | <b>115</b> |
|   | <b>Canned Goods</b>             | <b>115</b> |
|   | <b>Frozen Meat</b>              | <b>112</b> |
|   | <b>Packet Breakfast</b>         | <b>111</b> |
|   | <b>Fresh Fish</b>               | <b>108</b> |

## Year-on-Year Expenditure Trends - % change

Aldi



52 w/e 04 Jan 15

# Year-on-Year Expenditure Trends - & change

Lidl



Fresh+Chilled

28.2

TOTAL GROCERIES

19.3

Alcohol

14.8

Frozen

14.4

Ambient Groceries

12.1

Toiletries

9.7

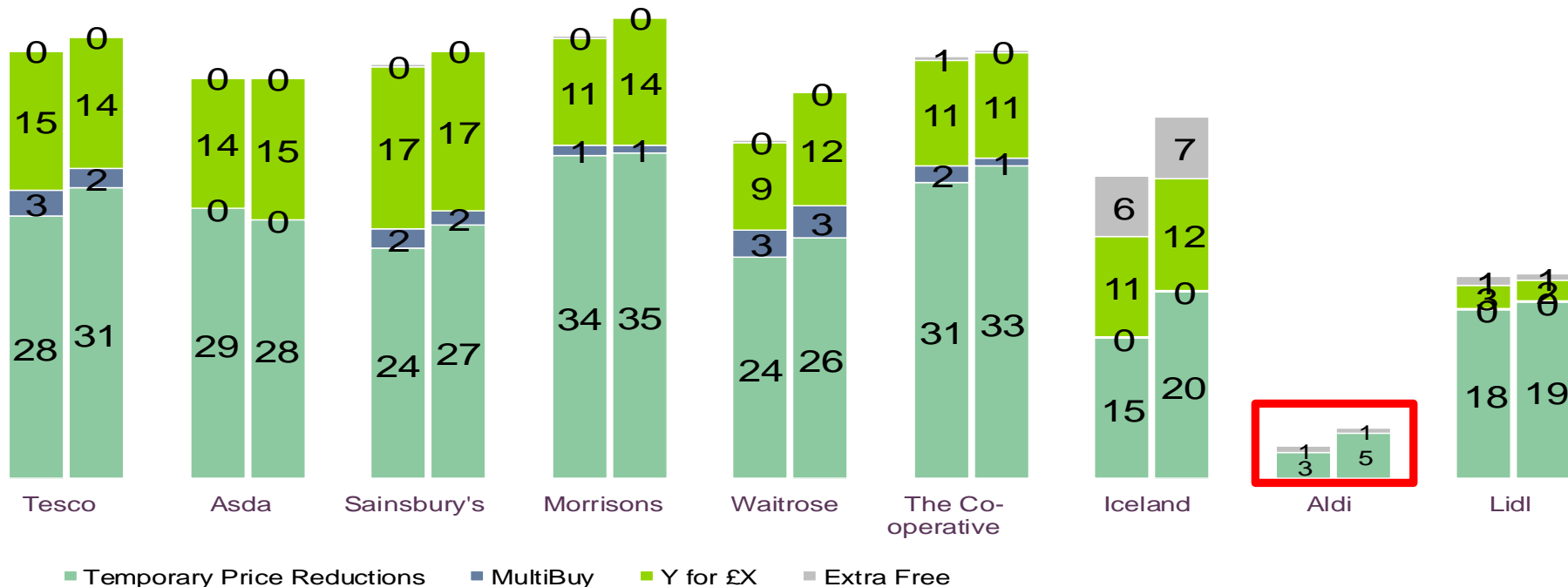
Household

8.6

52 w/e 04 Jan 15

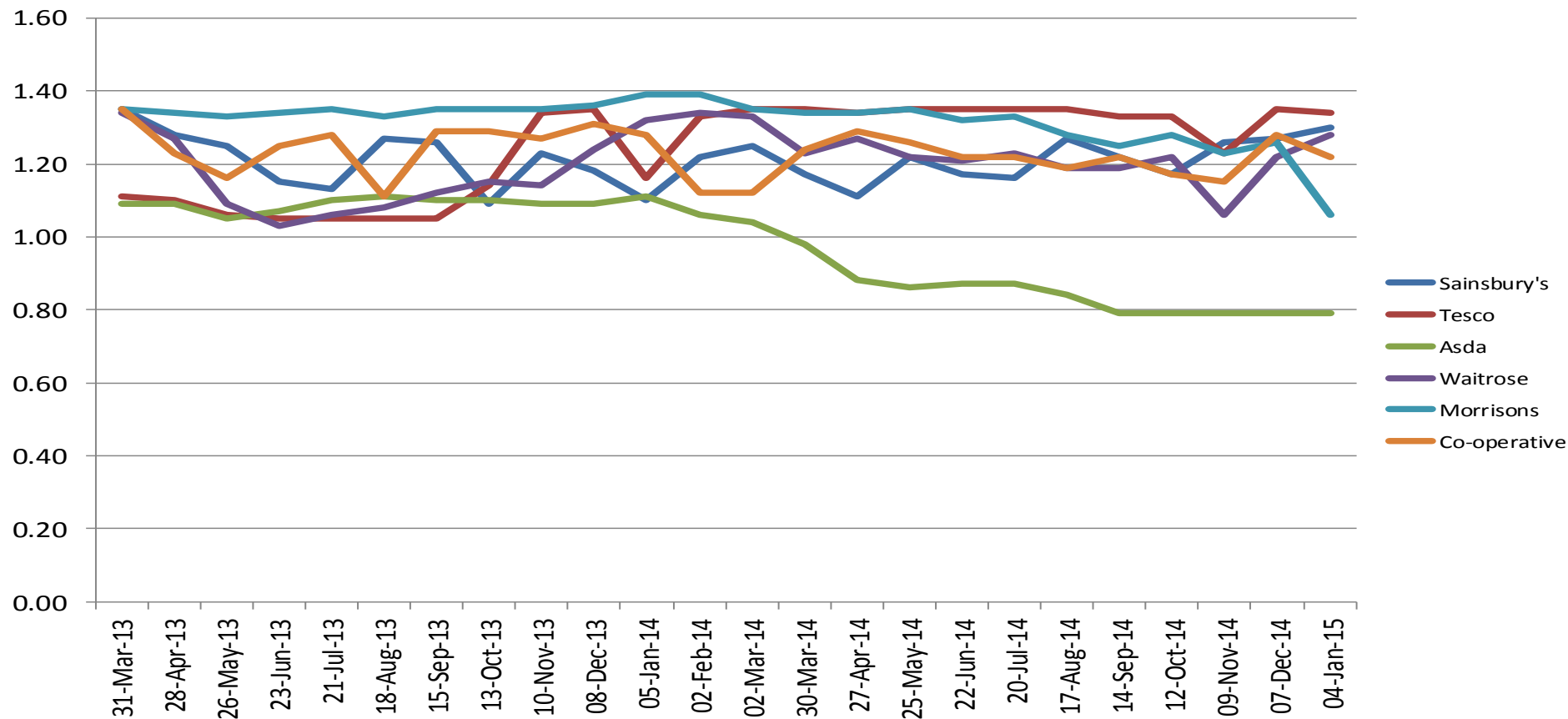
# The Importance of Promotions by Retailer

% Outlet Turnover by Promotional Type

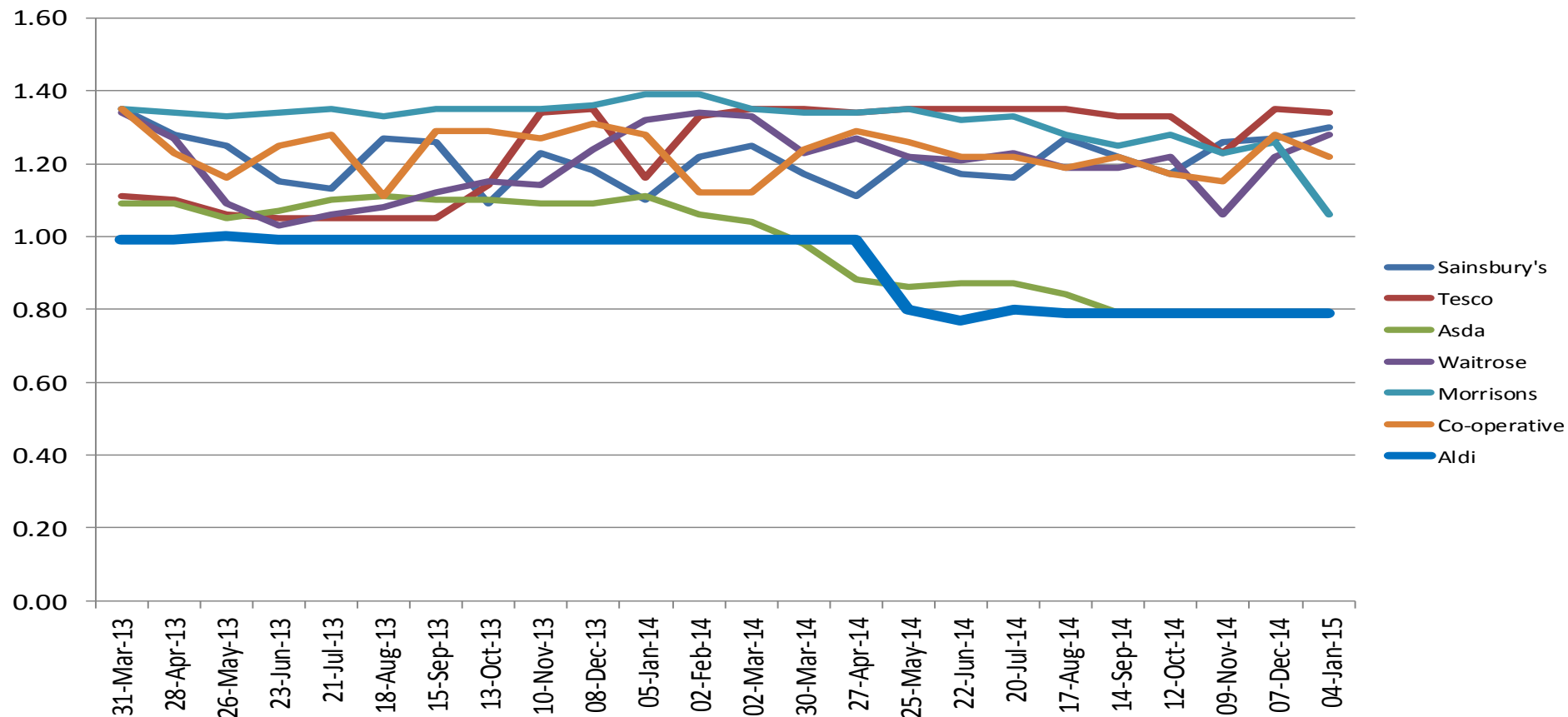


52 w/e Jan 05 2014 v. 52 w/e Jan 04 2015

# Kingsmill Great Everyday 800gm Price/pack



Kingsmill Great Everyday 800gm Price/pack

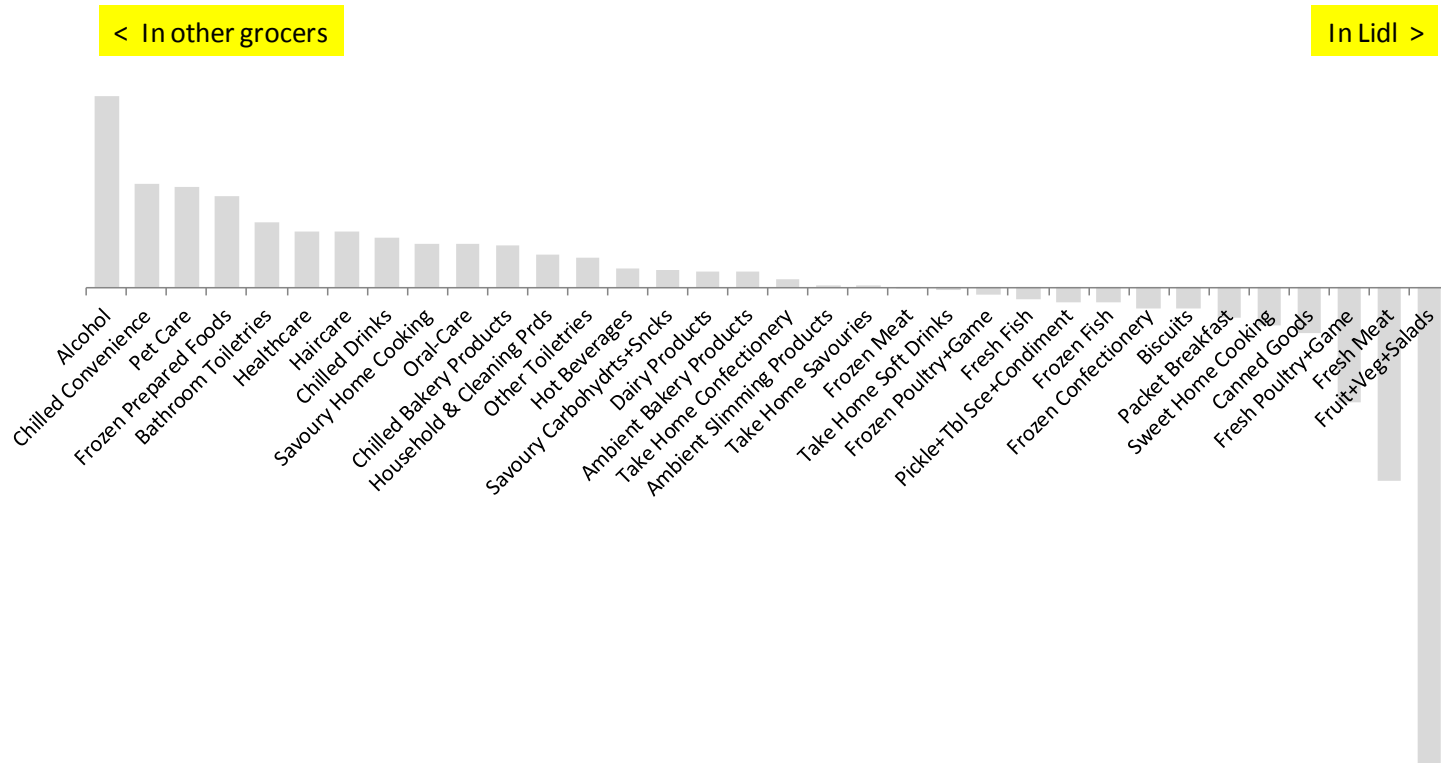


**We did #BlackFriday last week.  
We called it 'Friday'.**

#EverydayLowPrices



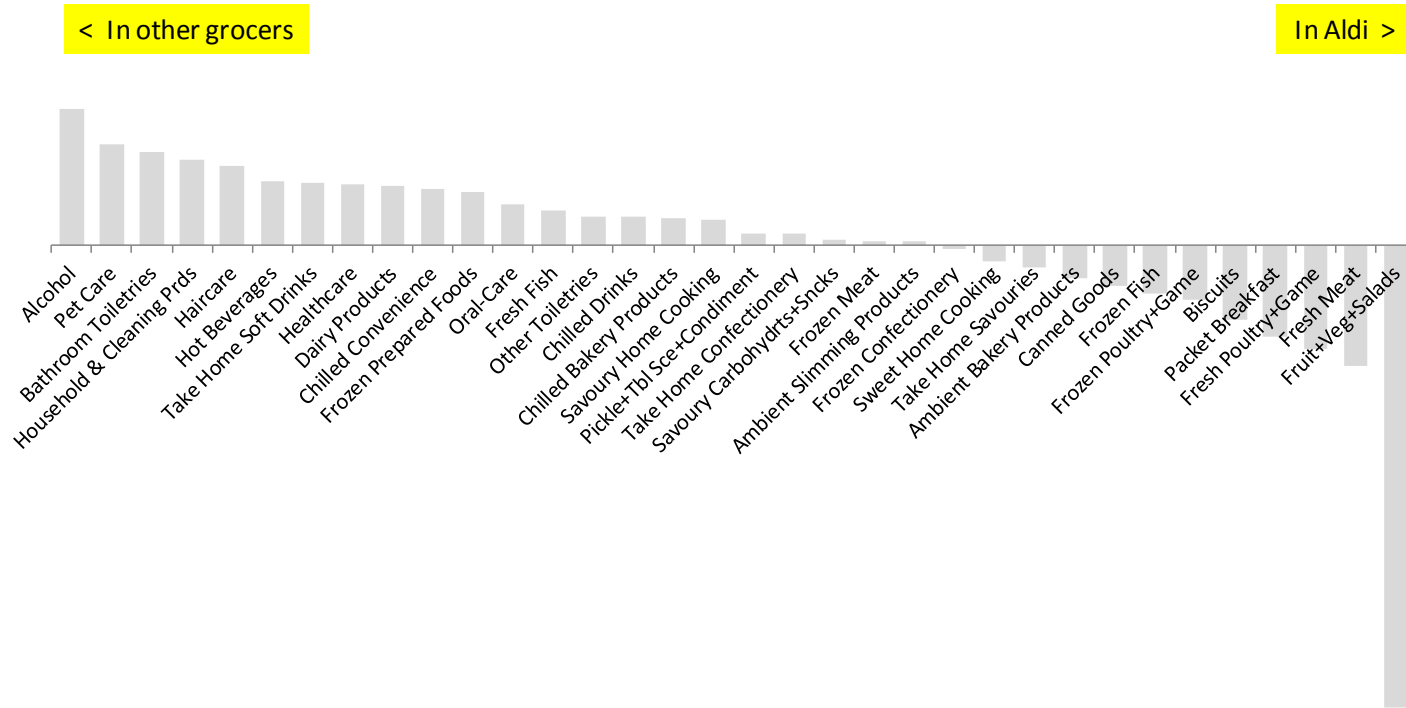
## Where Lidl shoppers prefer to shop



52 w/e Jan 04 2015



## Where Aldi shoppers prefer to shop



52 w/e Jan 04 2015

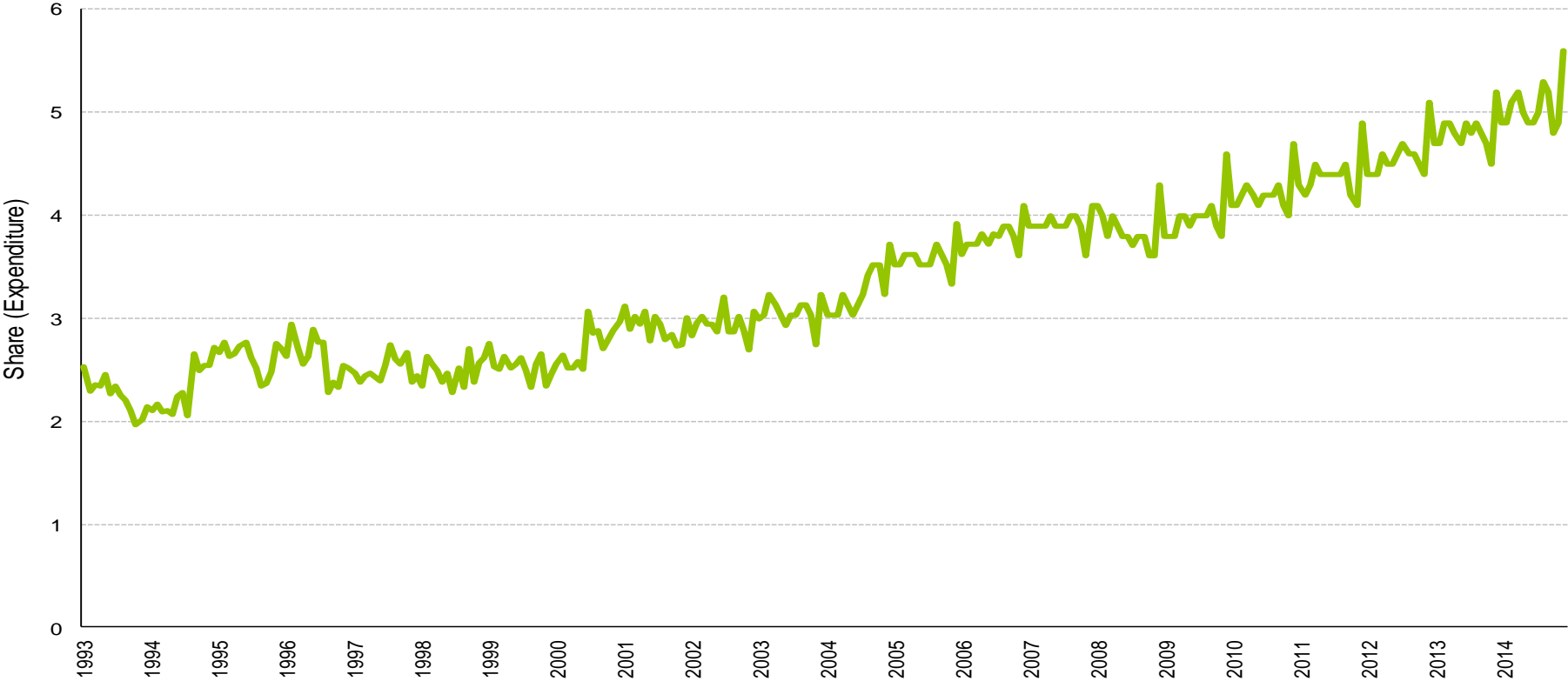
# Waitrose



KANTAR WORLDpanel High definition inspiration

# Long-Term Share of Till Roll Grocers

Waitrose



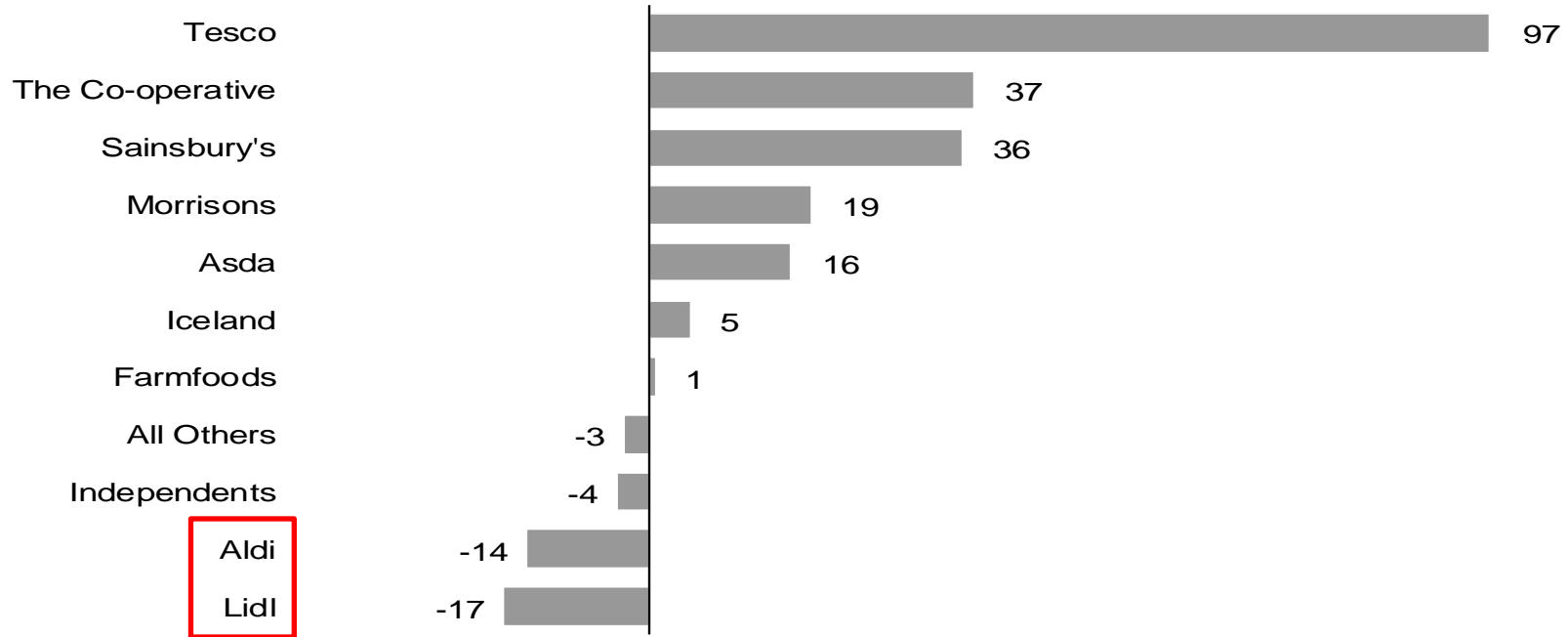
# Waitrose Share Index

|  |     |
|--|-----|
| 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

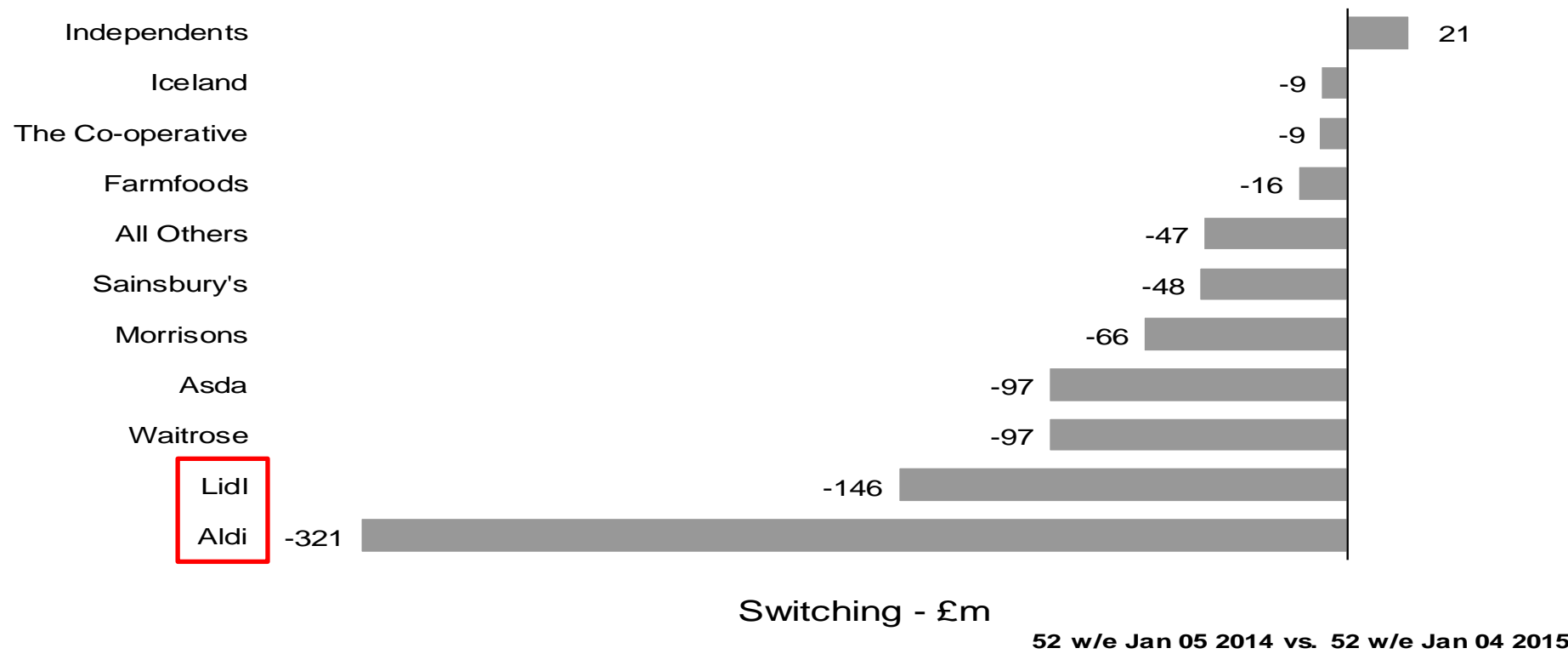
# Till Roll - Net Switching Volumes - Waitrose



Switching - £m

52 w/e Jan 05 2014 vs. 52 w/e Jan 04 2015

# Till Roll - Net Switching Volumes - Tesco

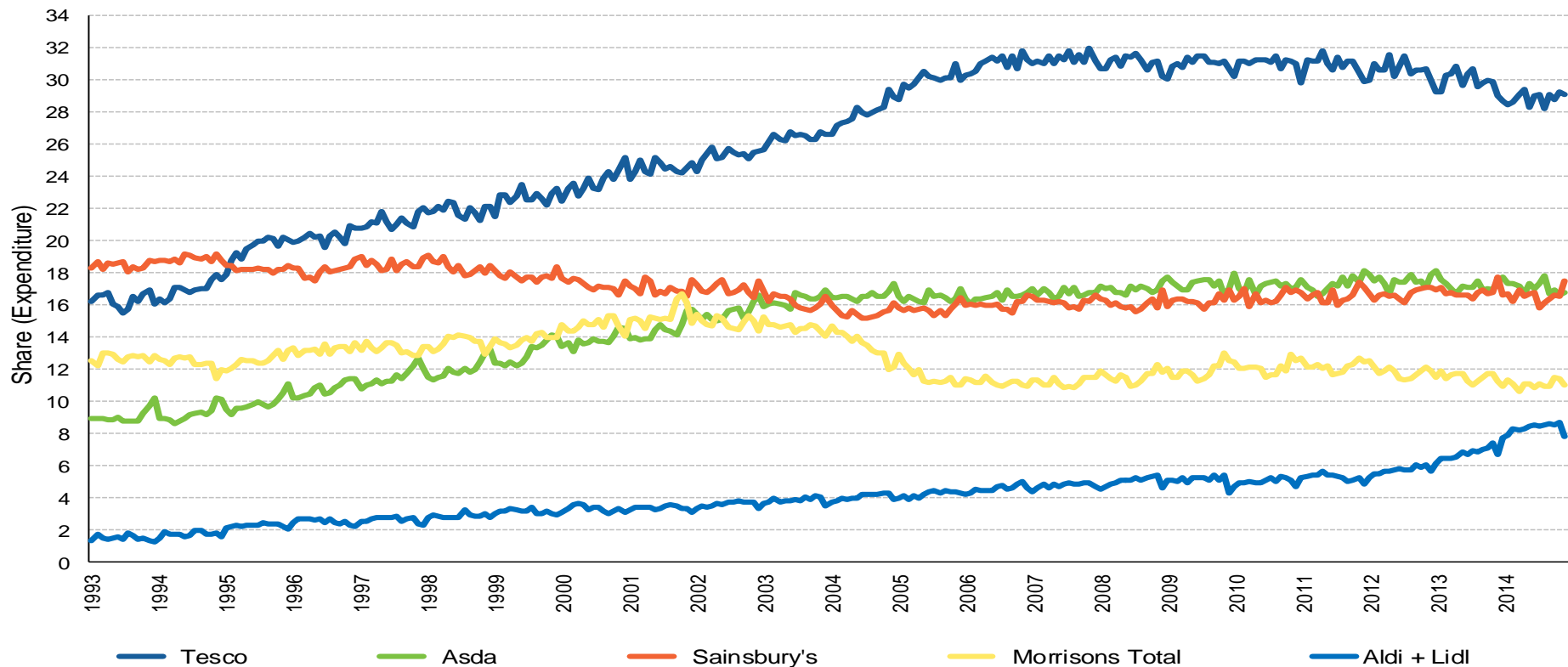


# The Agenda

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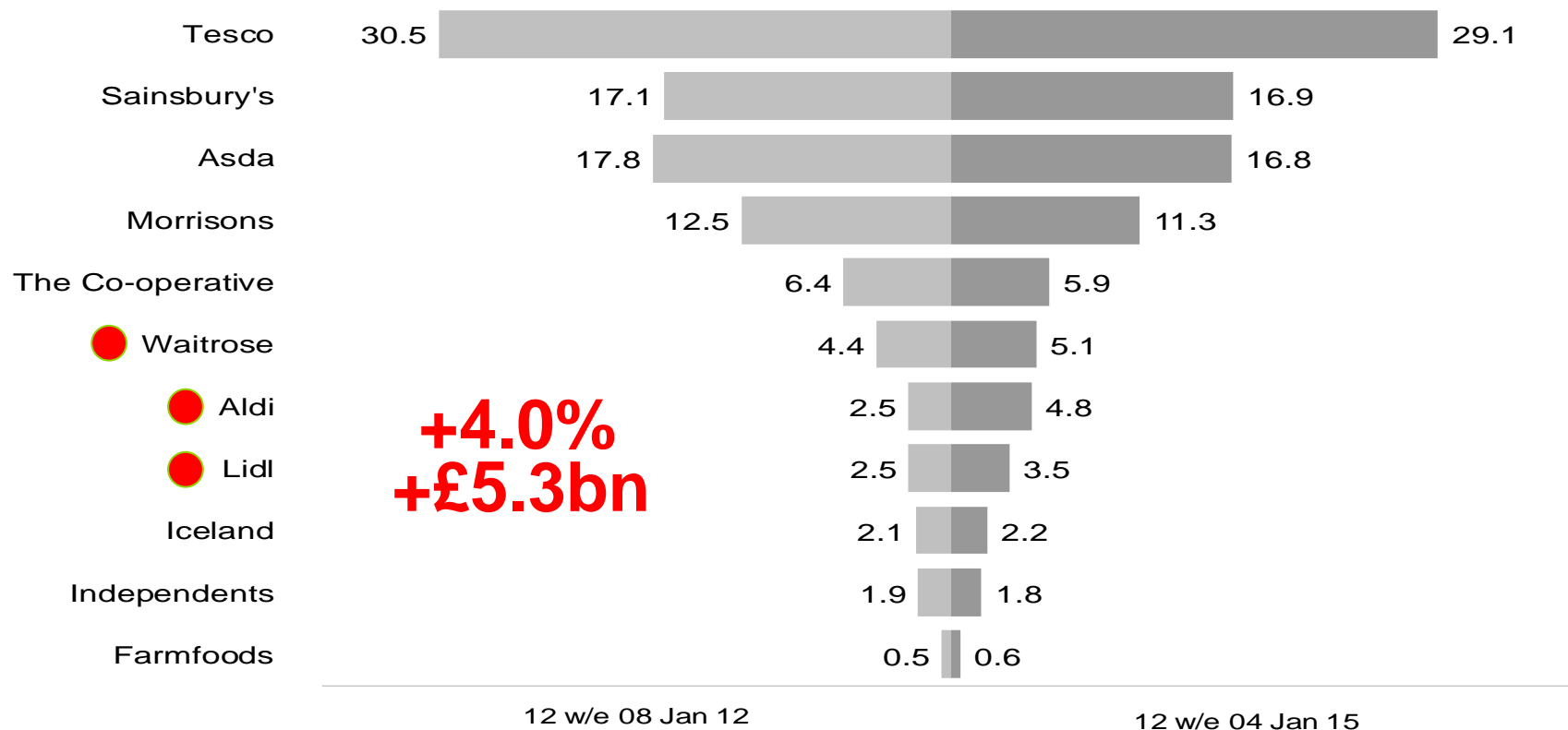


# Long-Term Share of Till Roll Grocers

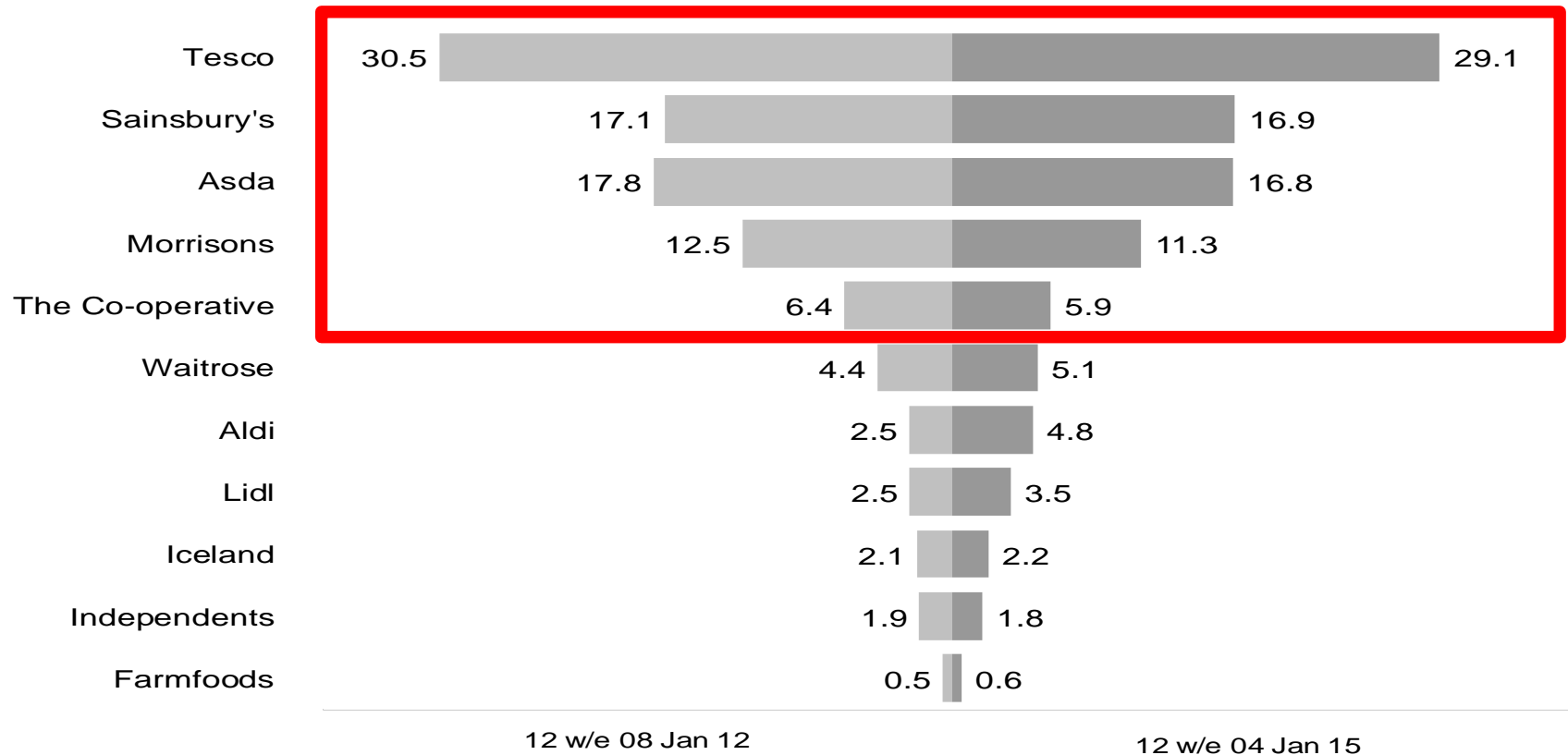




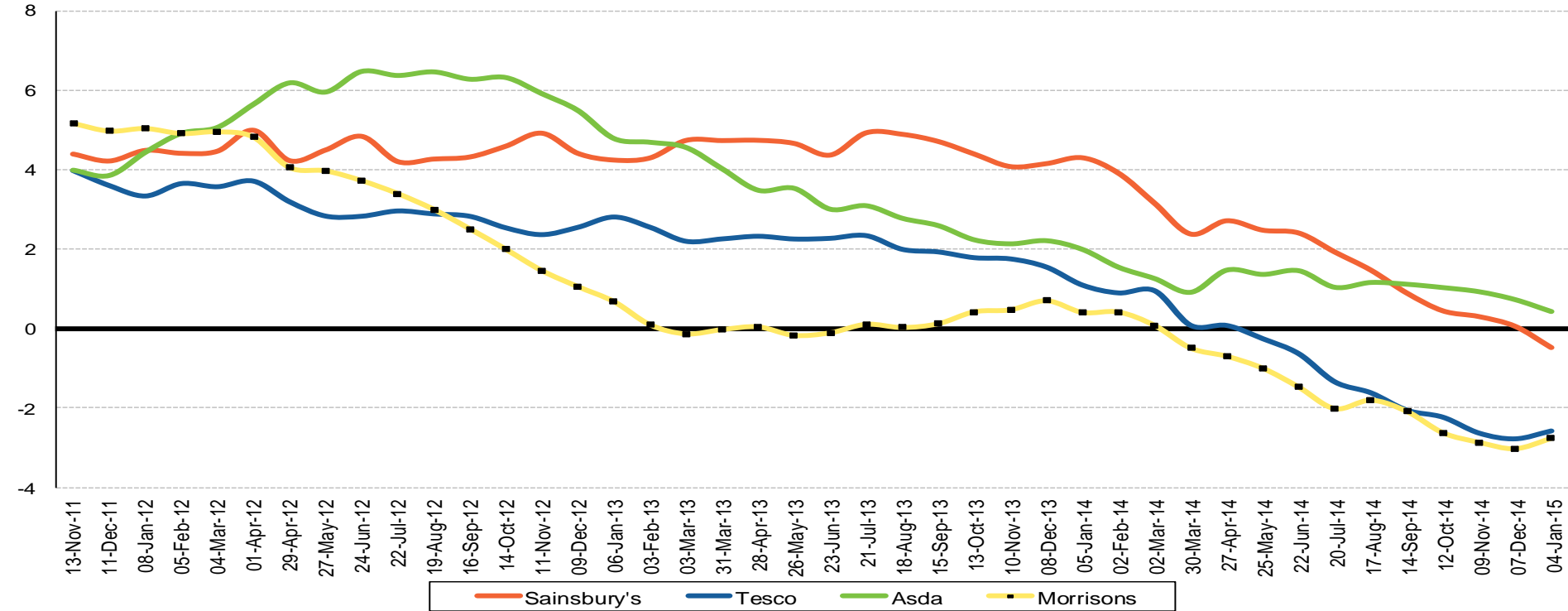
# Latest Period Till Roll Totals - Share of Total Grocers



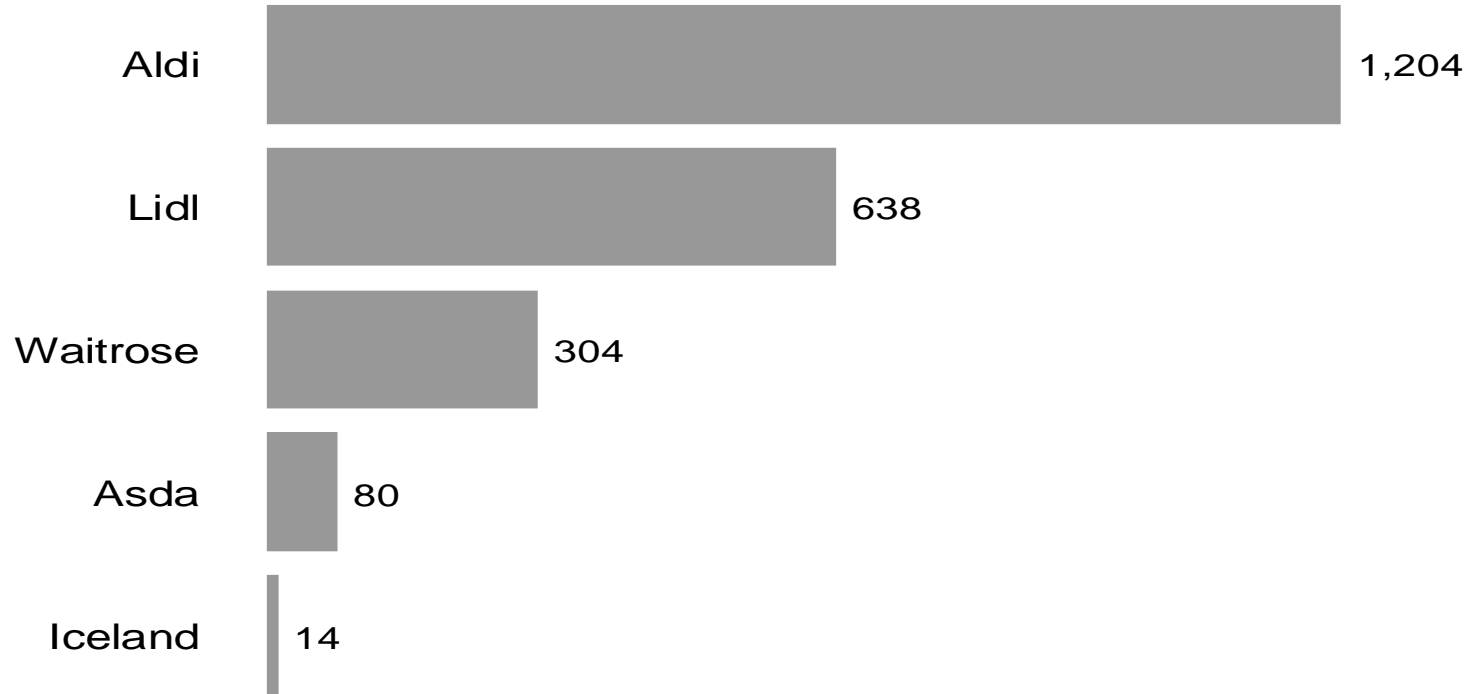
## Latest Period Till Roll Totals - Share of Total Grocers



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



## Annual Till Roll Totals Expenditure Changes £m



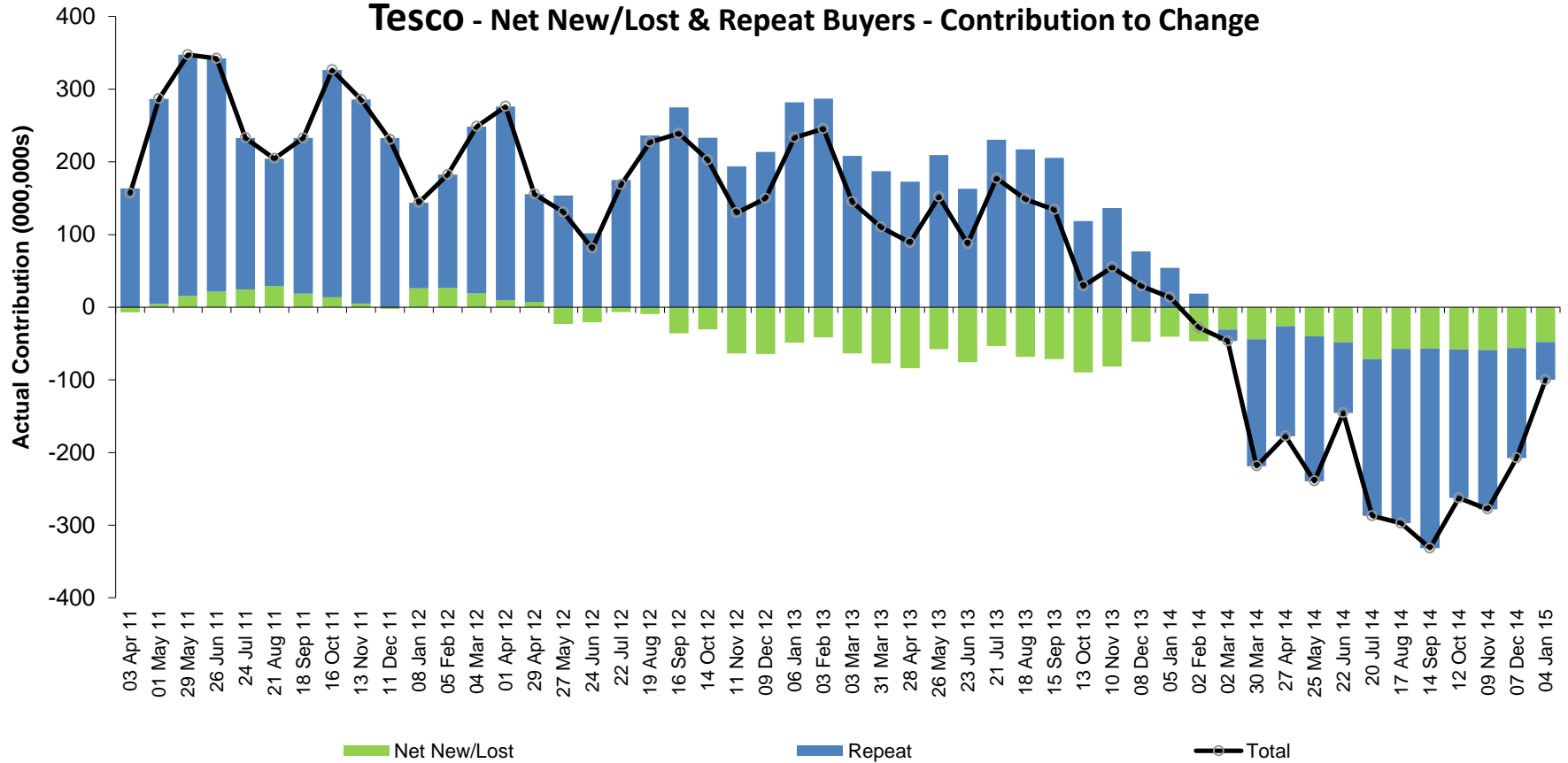
52 w/e Jan 04 2015 y/y £m Change



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





Every little helps

Sign in

Store locator

Contact us

Help

Rate this page

Search

Groceries

for

Keywords



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.

Back to school



Start shopping



My account



My current order



Delivery slots from £1



Favourites



Delivery saver from £3



Prices down



Lots of brands  
are now cheaper  
at **TESCO**

Terms and conditions apply\*

See more >

Real  
Food



Wine by  
the case



Discover  
blinkbox



Phone  
Shop



One Little  
Change



Fuel  
Save



Price  
Promise









# TESCO

HELLO

Welcome to  
Tesco Taplo  
EST. 2014

HERE  
TO HELP

THE  
PRICE  
PROMISE



T.K. maxx





**COSTA**

**Frankie & Benny's**  
NEW YORK ITALIAN RESTAURANT & BAR

THE HOME SWEET  
HOME OF  
irresistible  
COFFEE

THE HOME SWEET  
HOME OF  
irresistible  
COFFEE

THE HOME SWEET  
HOME OF  
irresistible  
COFFEE

COSTA

[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

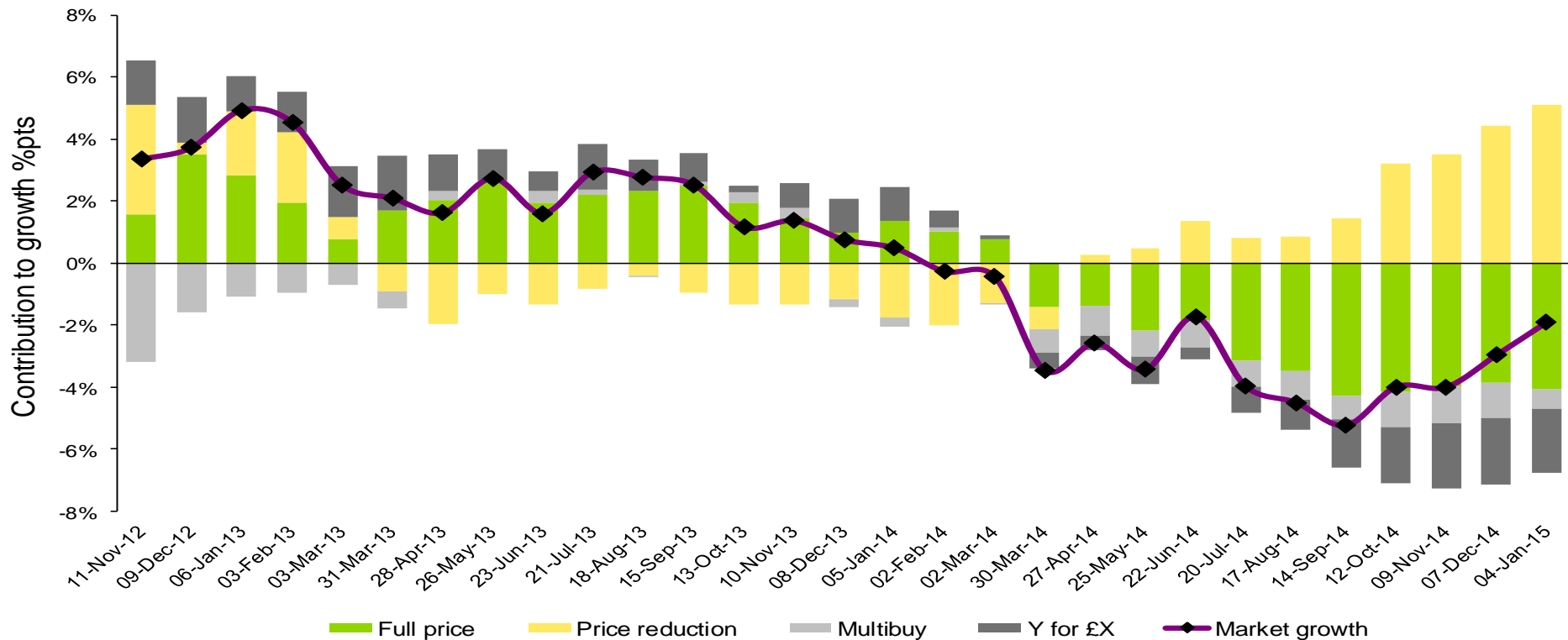
Only  
49p

Only  
49p

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

# PROMOTIONAL MECHANICS CONTRIBUTION TO GROWTH

Tesco - 12 w/e




# 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



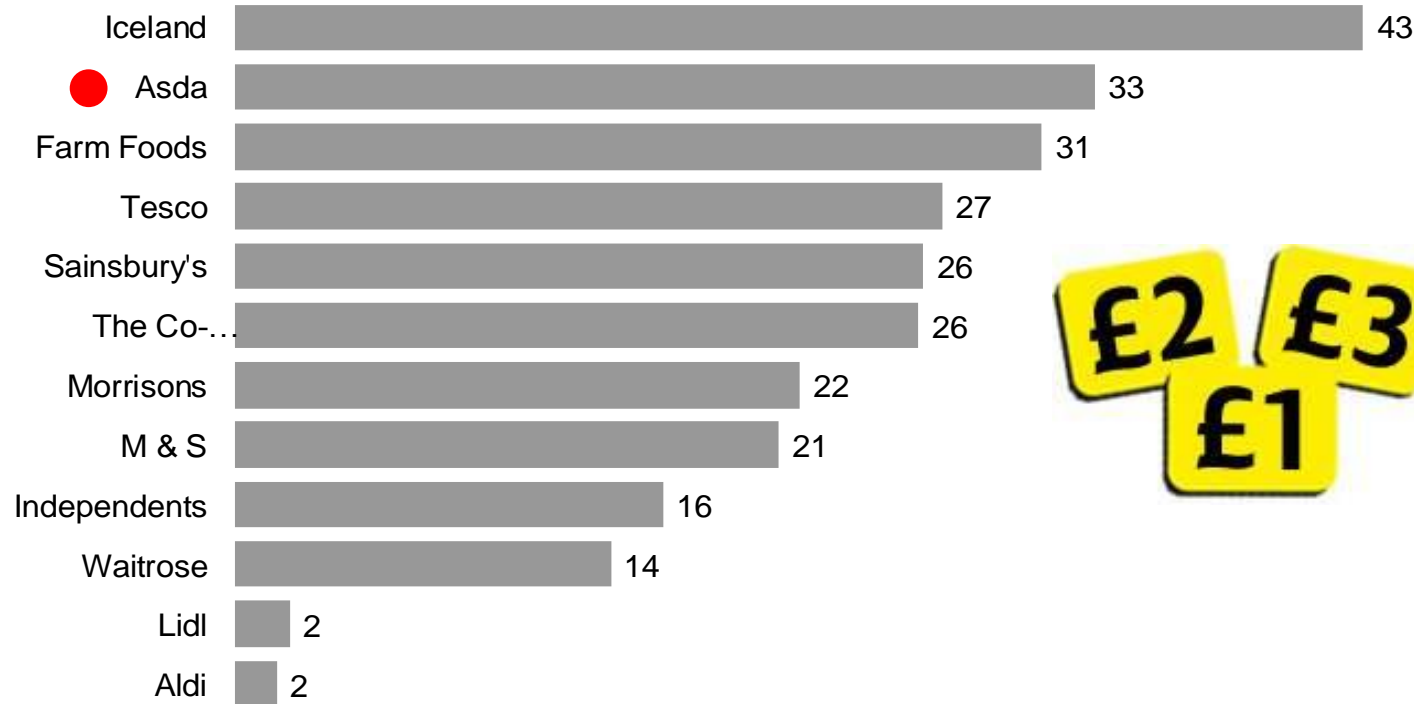


## Lots of love for our £1 products

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.

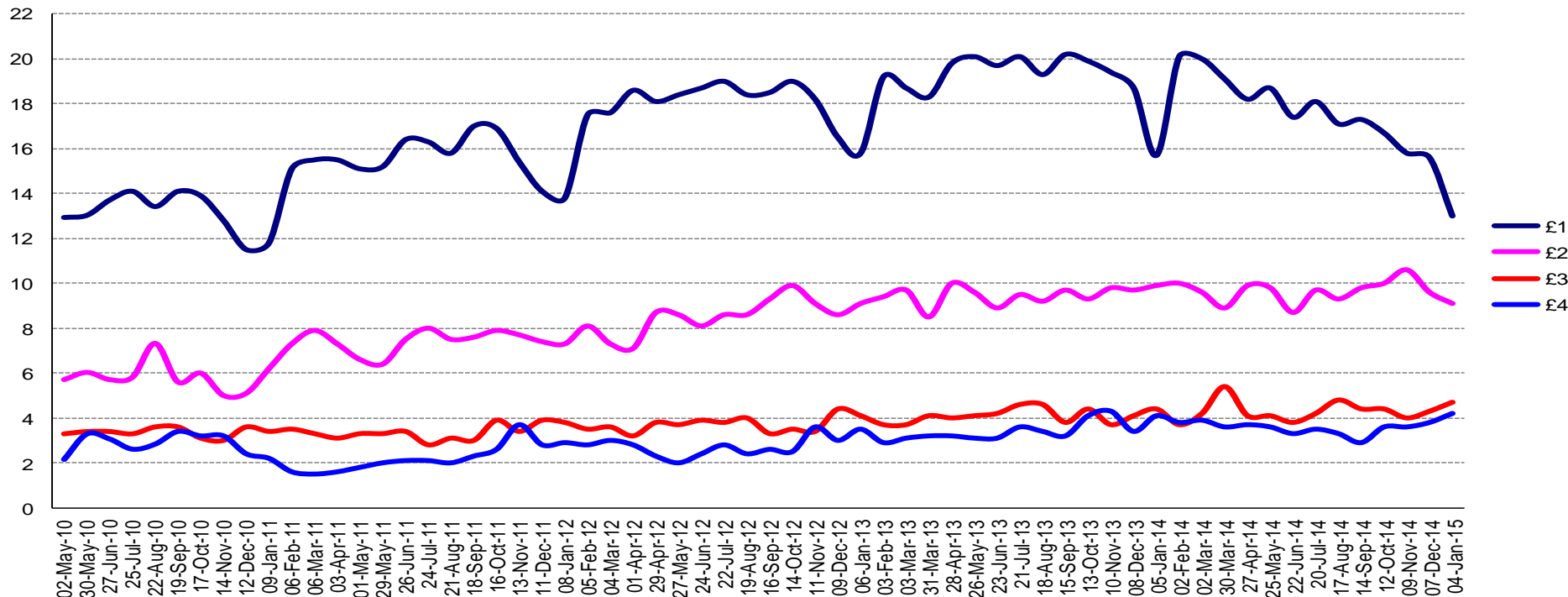


## Grocery Share at Round Pound Prices £1/2/3/4 - £%



12 w/e 04 Jan 2015

# Grocery Share at Round Pound Prices - £% - Asda



# 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

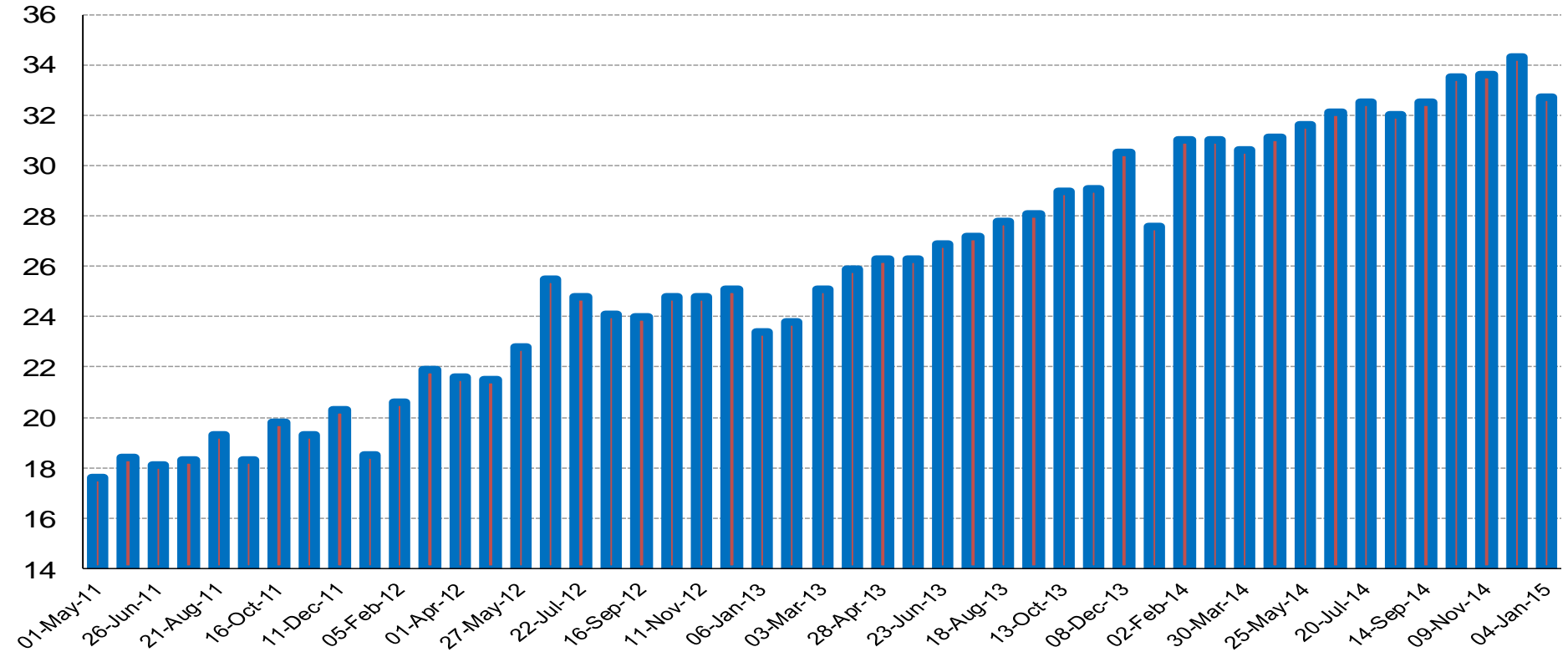


£1  
each

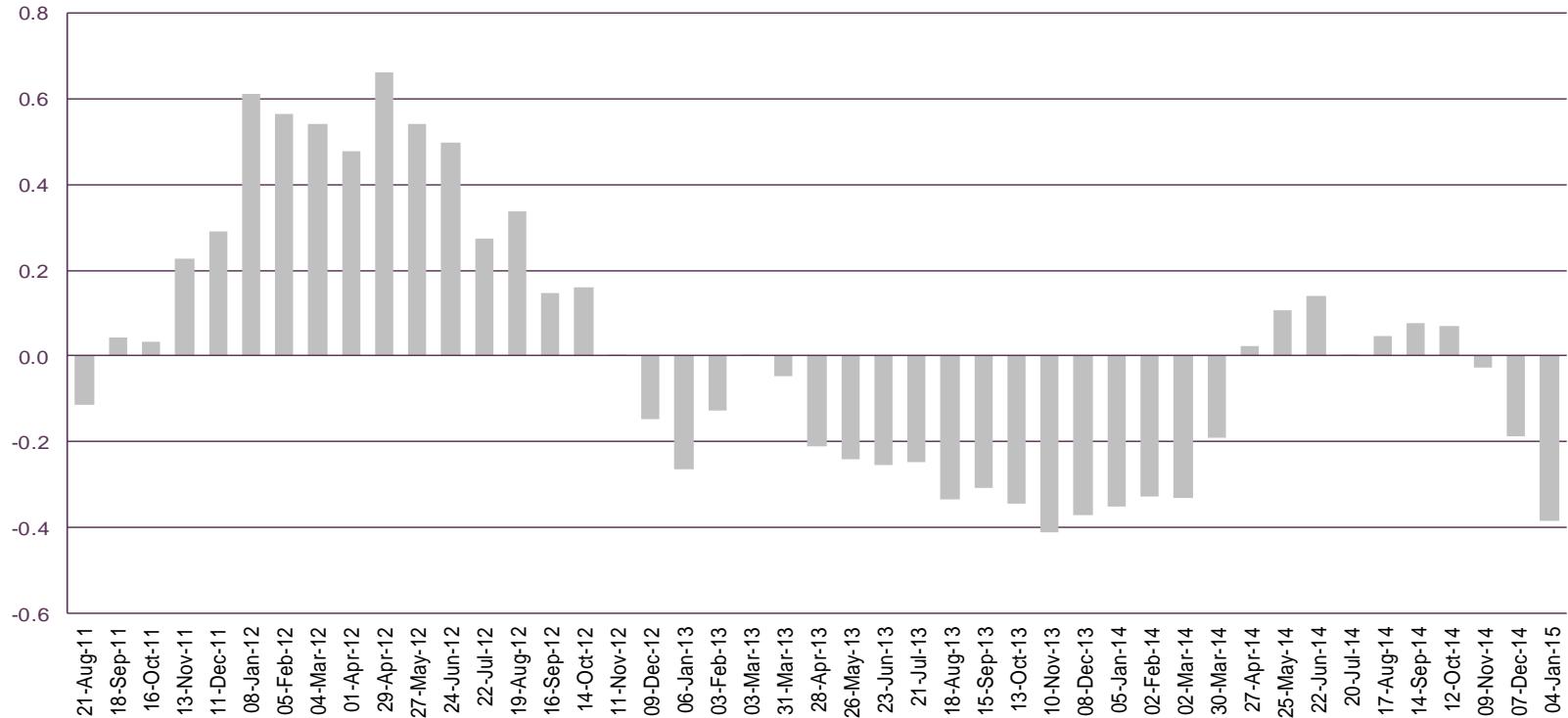


£2  
each

## Aldi share amongst Asda/Aldi Shoppers - £%

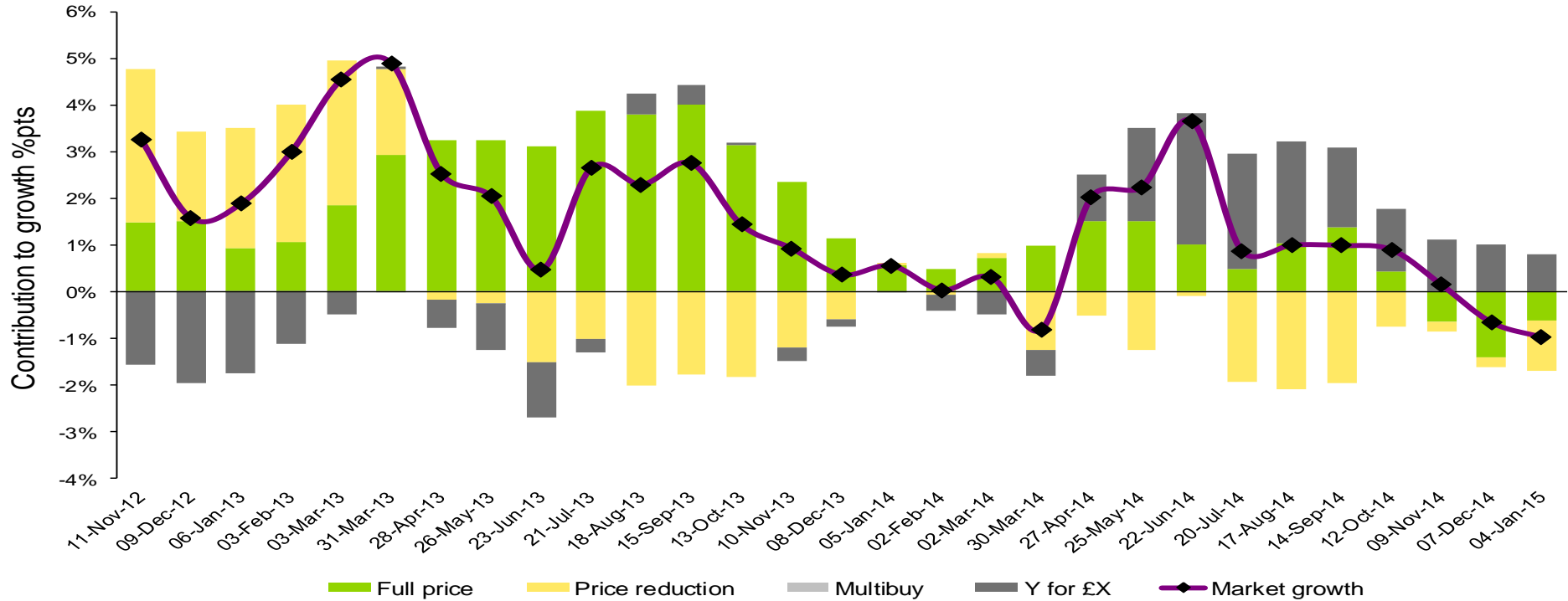


## Asda Share Change - 12 week share year-on-year change



# PROMOTIONAL MECHANICS CONTRIBUTION TO GROWTH

Asda - 12 w/e



Grocery (RST) 12w/e



# Sainsbury's



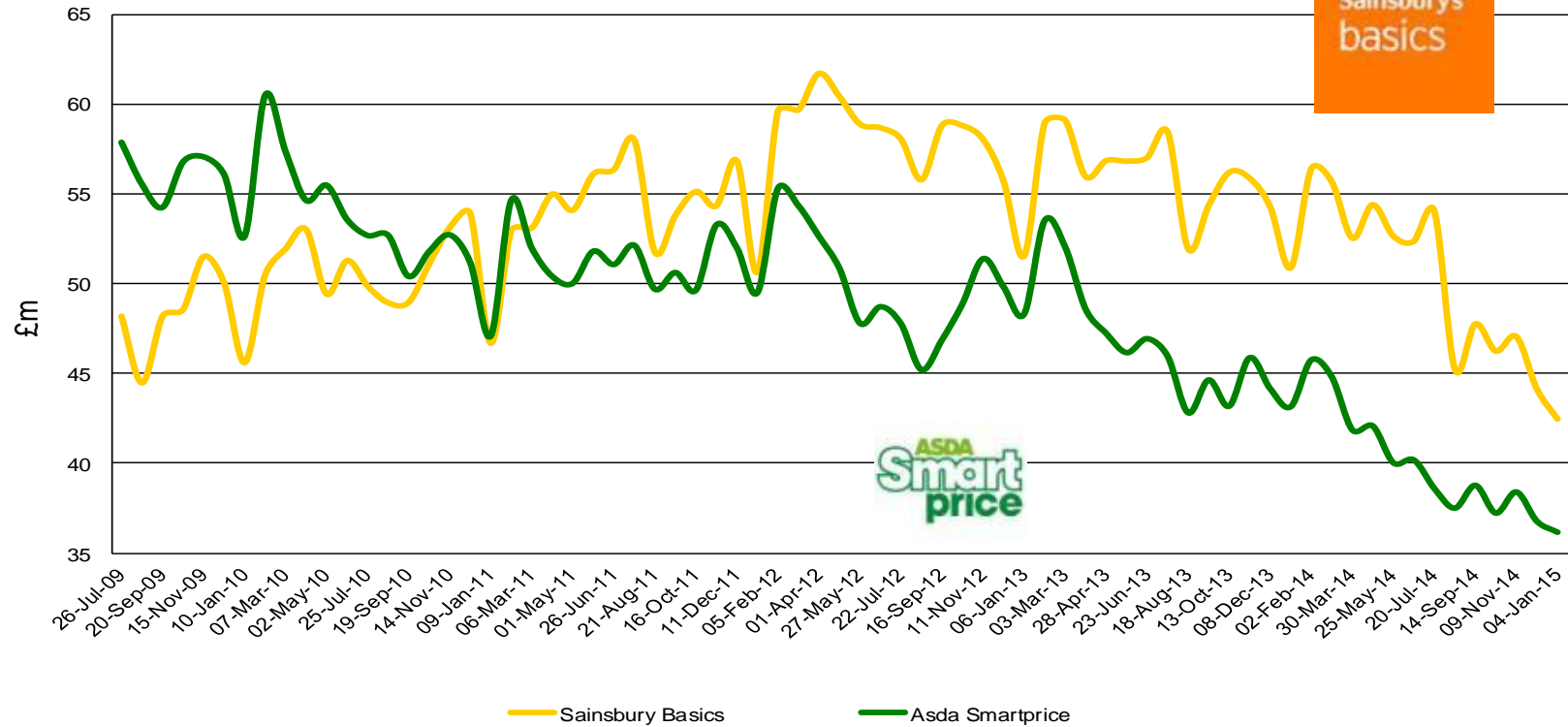
KANTAR WORLDpanel High definition inspiration



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 &amp; Ranges

Clothing

Kids &amp; 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 &amp; 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 &gt;

## 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 &gt;





MORRISONS

Shop  
onlineMatch  
& More

Contact Us



Store Finder

Offers

Christmas

Market Street

Recipes &amp; Ranges

Clothing

Kids &amp; 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 &amp; 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 &gt;

## 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

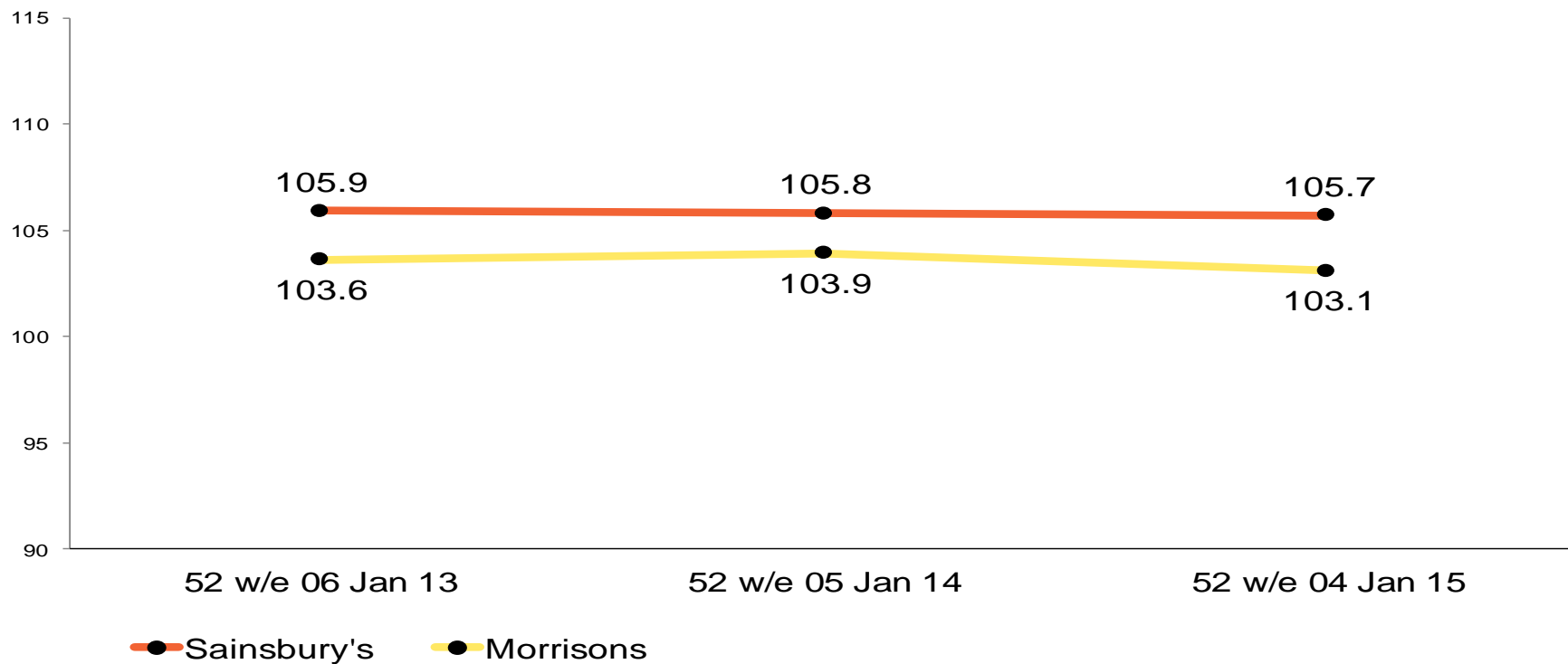


Find your local experts &gt;

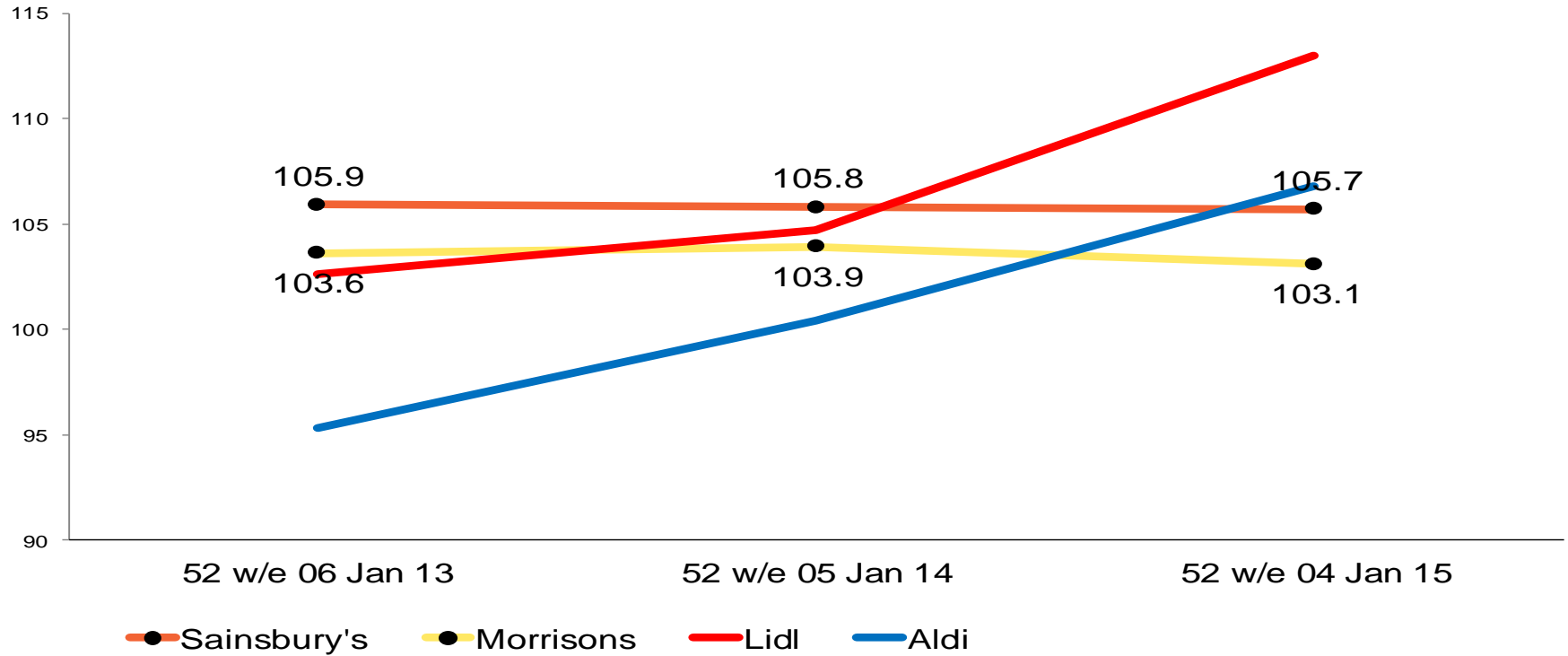
## Market Sectors indexed on Total Groceries

|   |                                |            |
|---|--------------------------------|------------|
| ● | <b>Fresh Fish</b>              | <b>130</b> |
| ● | <b>Fresh Meat</b>              | <b>118</b> |
| ● | <b>Chilled Bakery Products</b> | <b>113</b> |
|   | <b>Canned Goods</b>            | <b>111</b> |
| ● | <b>Chilled Convenience</b>     | <b>107</b> |
| ● | <b>Fresh Poultry+Game</b>      | <b>106</b> |
|   | <b>Hot Beverages</b>           | <b>105</b> |
|   | <b>Alcohol</b>                 | <b>104</b> |
|   | <b>Savoury Home Cooking</b>    | <b>103</b> |
| ● | <b>Ambient Bakery Products</b> | <b>103</b> |

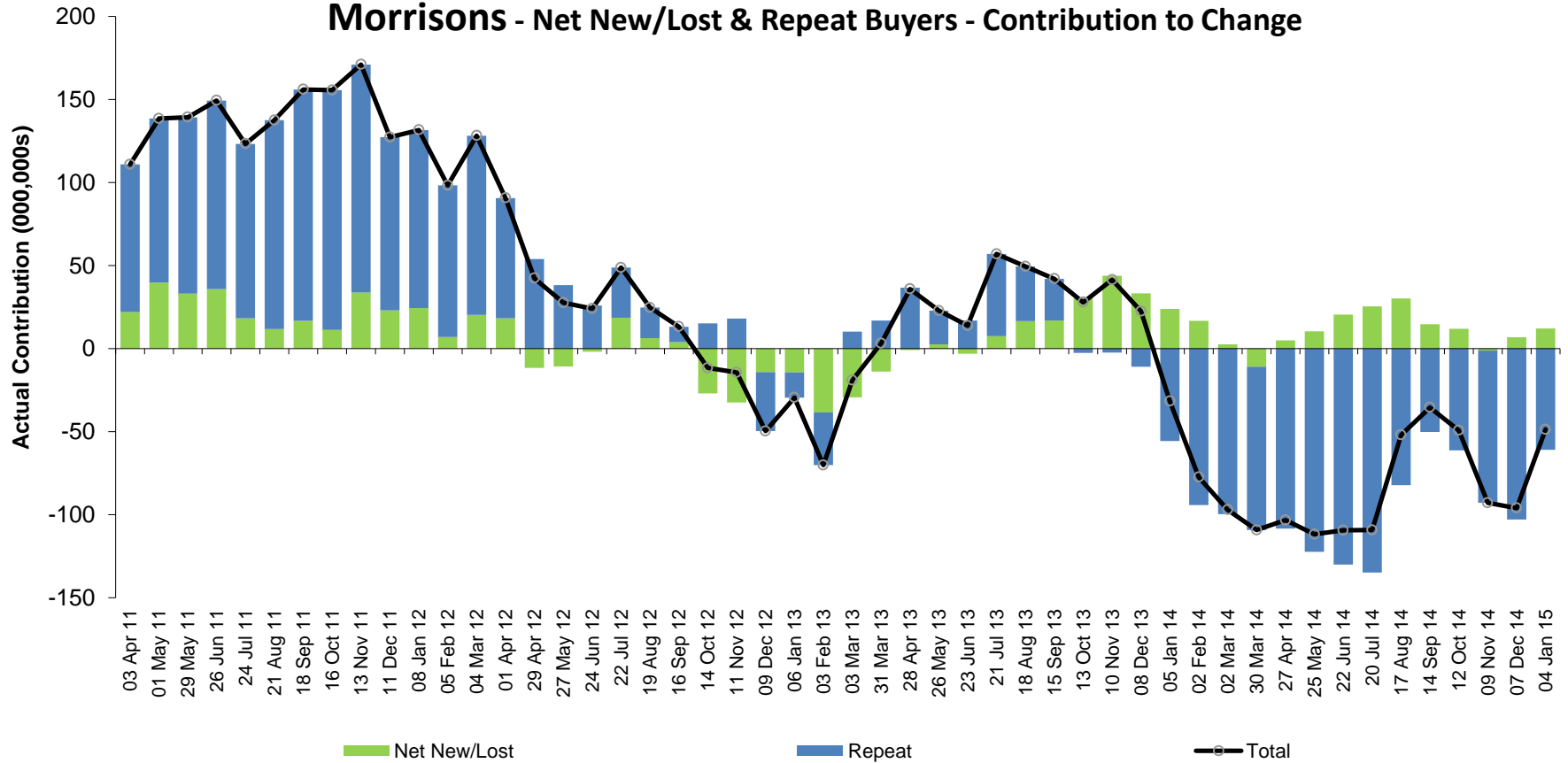
## Fresh & Chilled Trading Indices



# 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

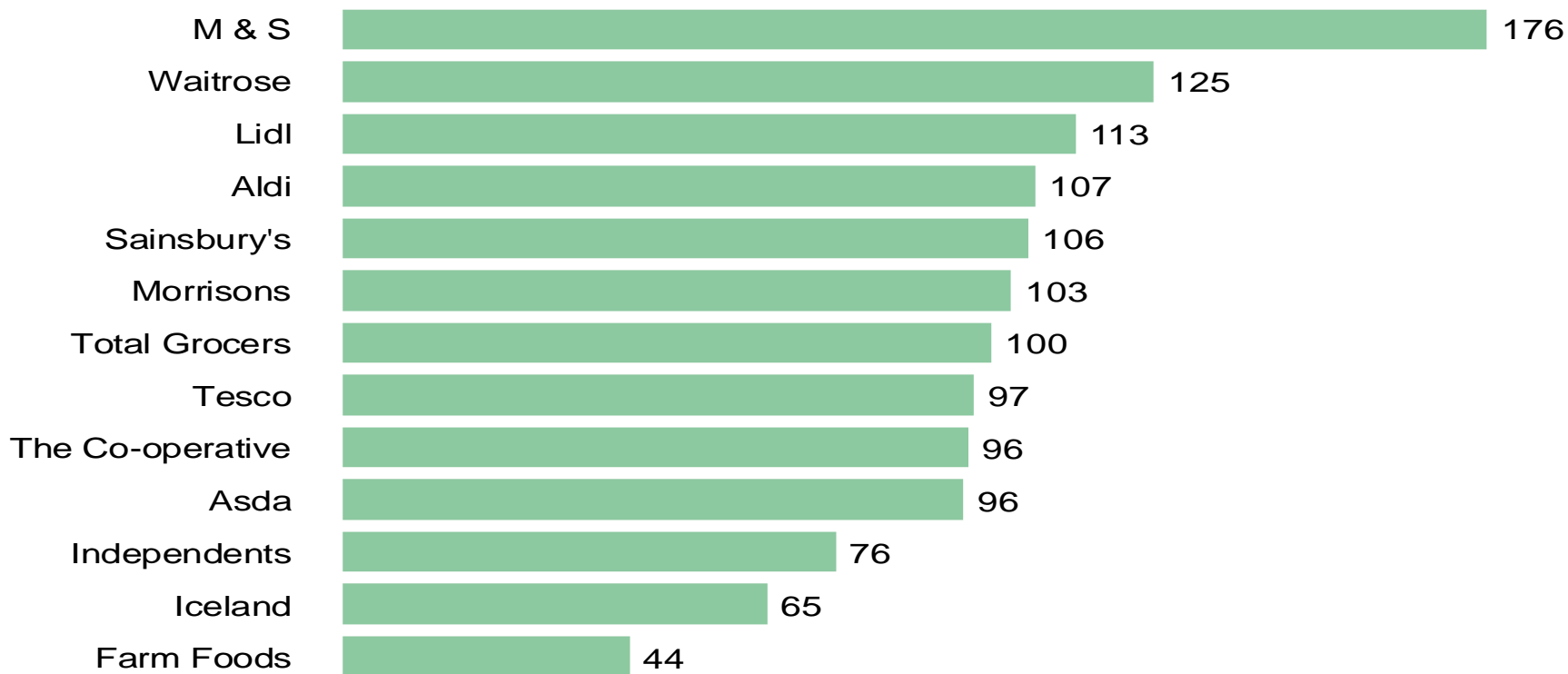
Or you could just go to



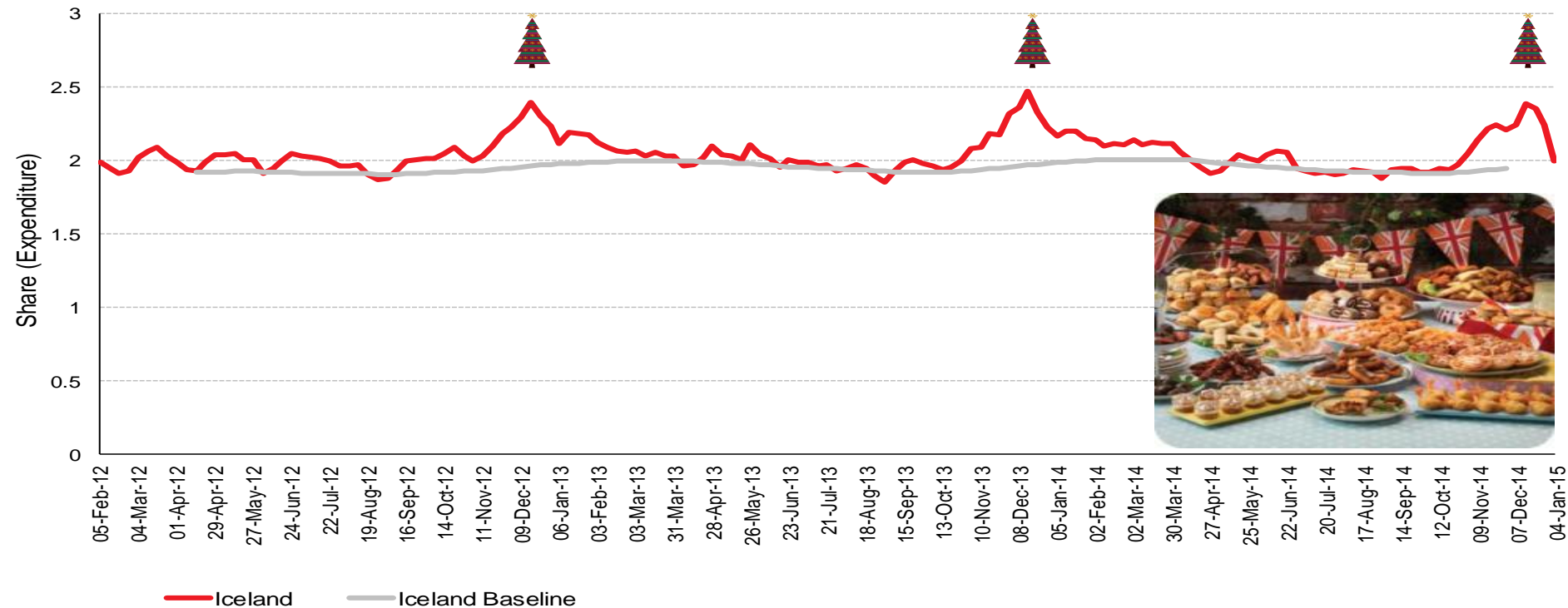
Frosty morning? Don't worry, we've found a use for that Morrisons card...



## Fresh + Chilled Trading Indices - 52 w/e Jan 04 2015



# Iceland Share of Till Roll Grocers

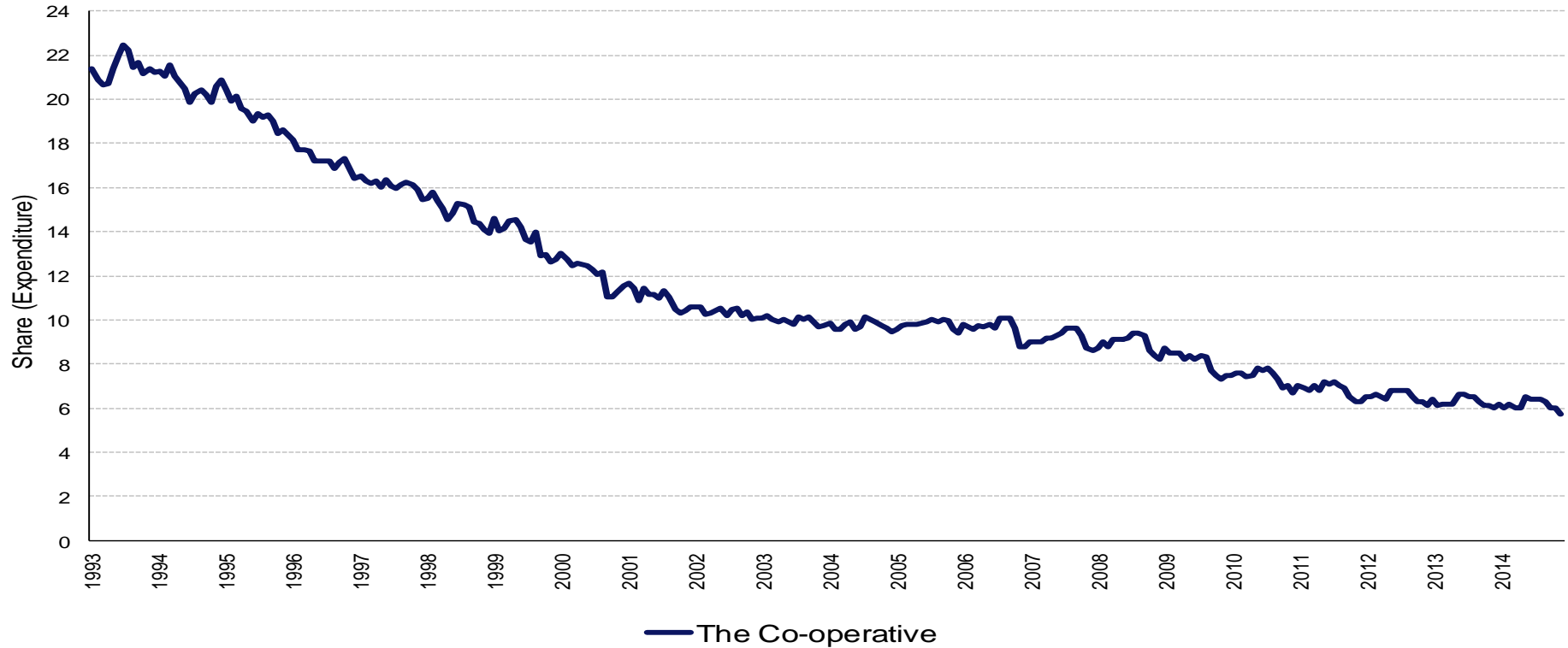


# Iceland

## Household Income Signatures

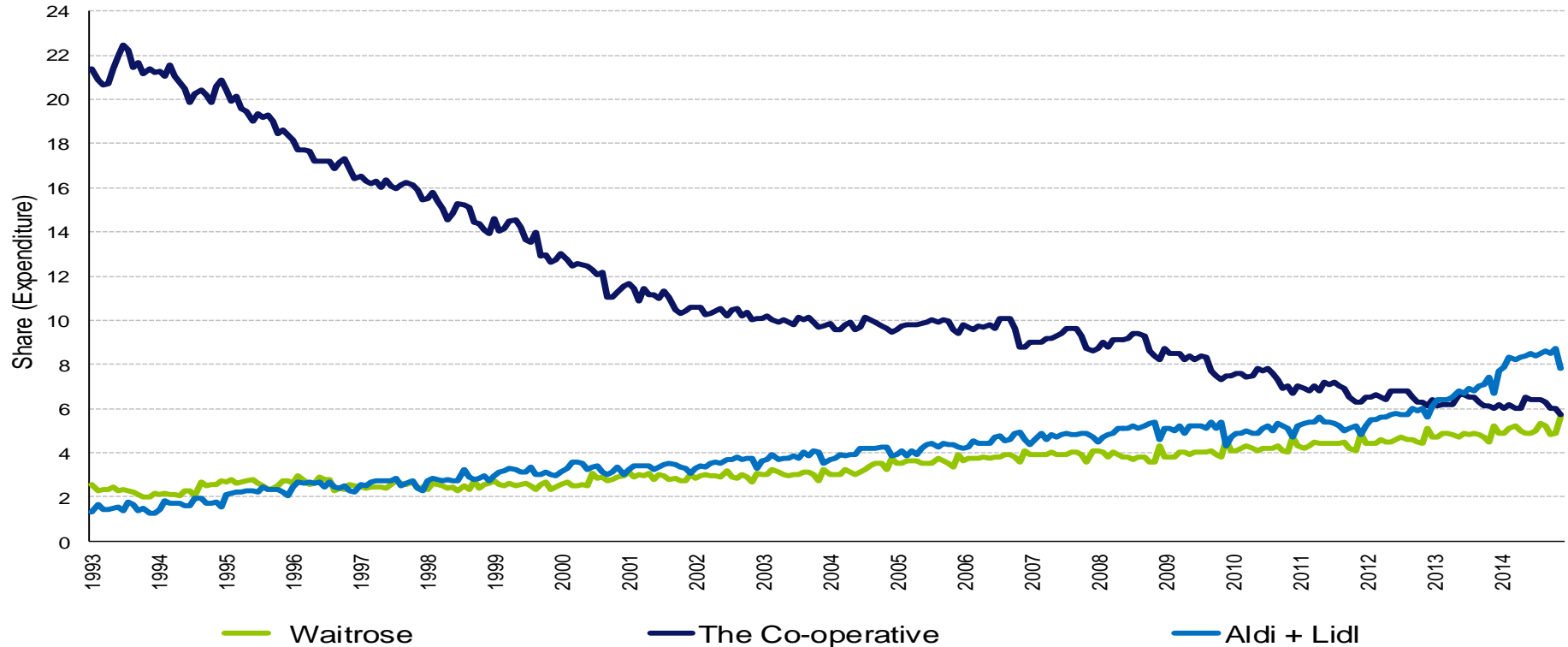


## Long-Term Share of Till Roll Grocers



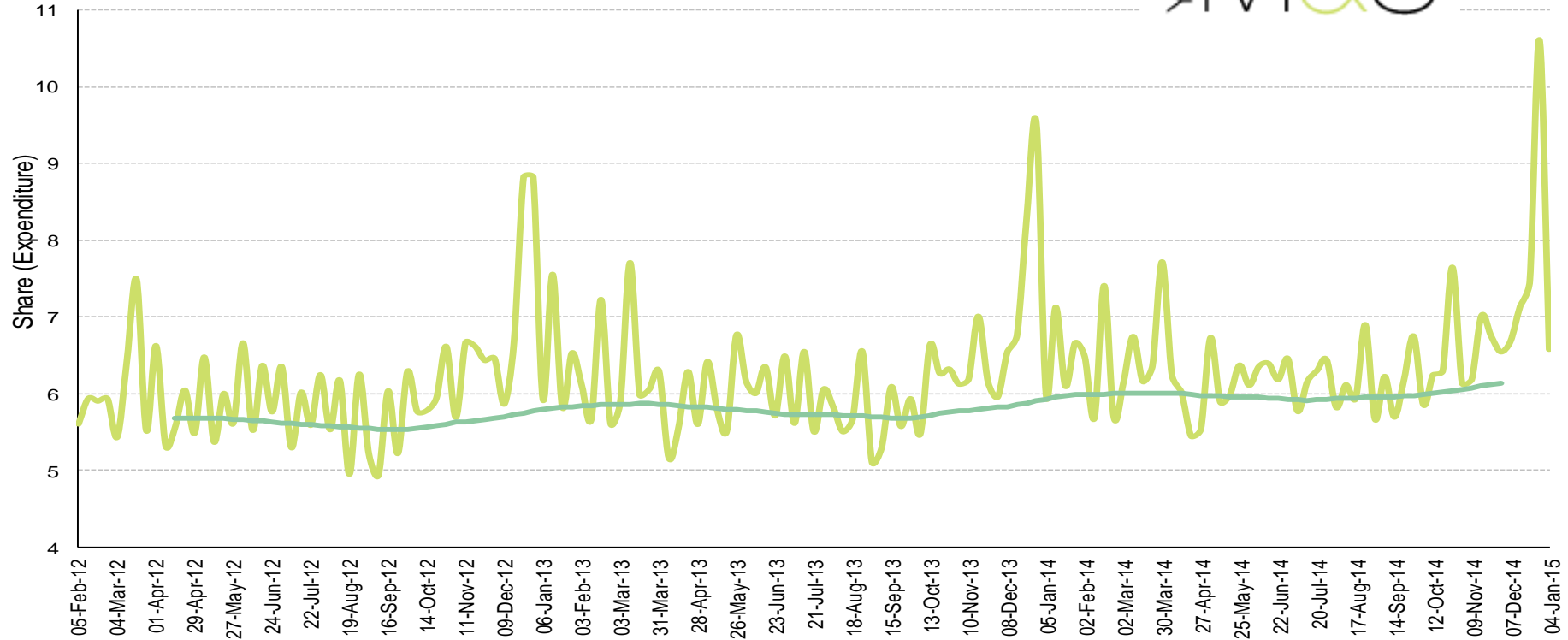


## Long-Term Share of Till Roll Grocers

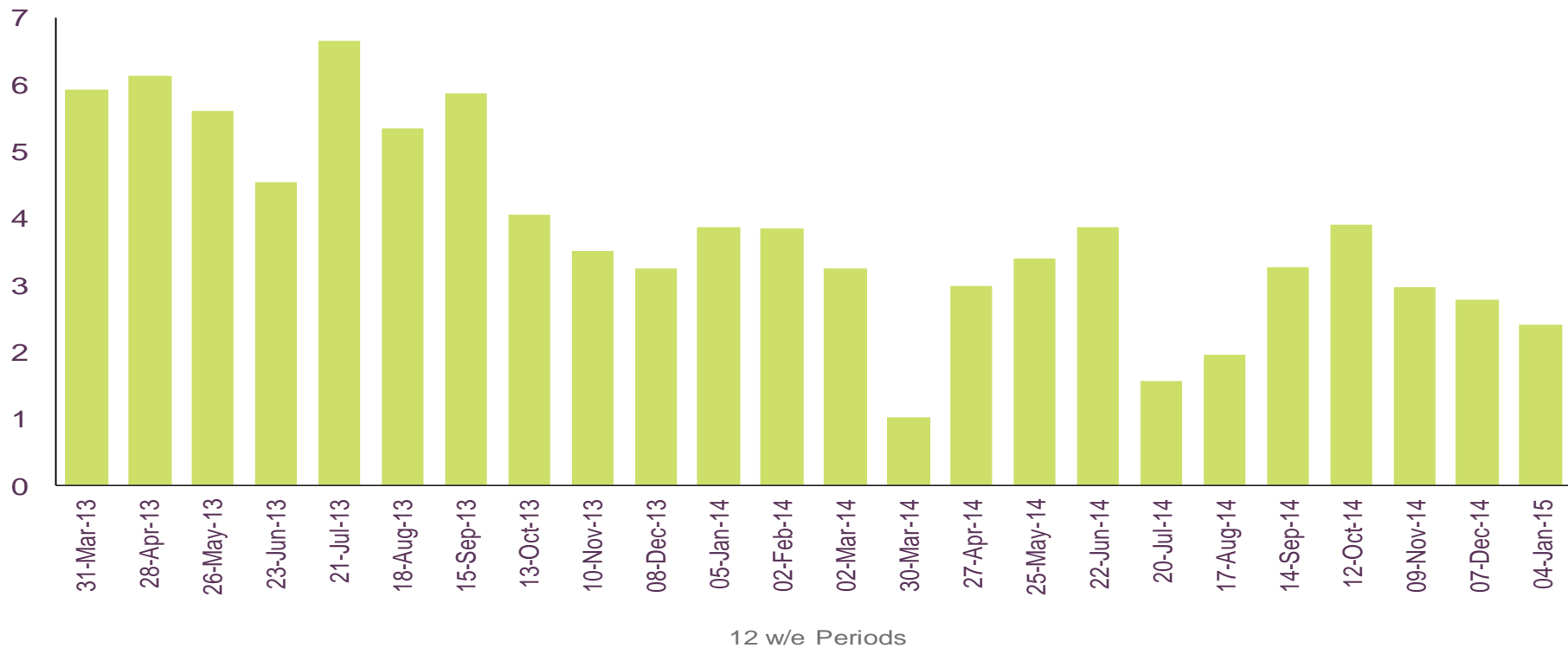


# M&S Share of Fresh & Chilled Groceries

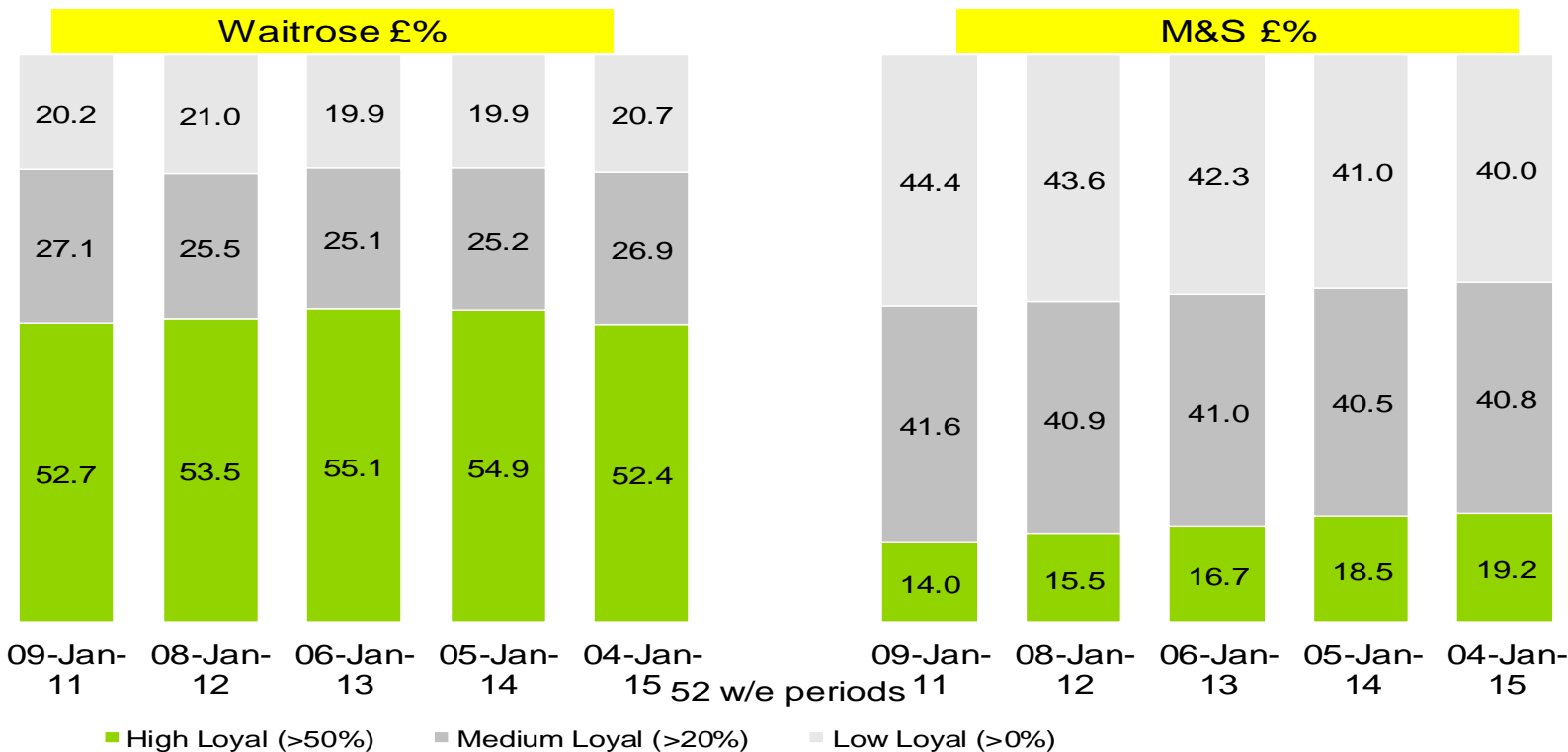
YOUR M&S



## M&S Year-on-Year Growth Trends - RST £%



# Trended Loyalty Breakdown



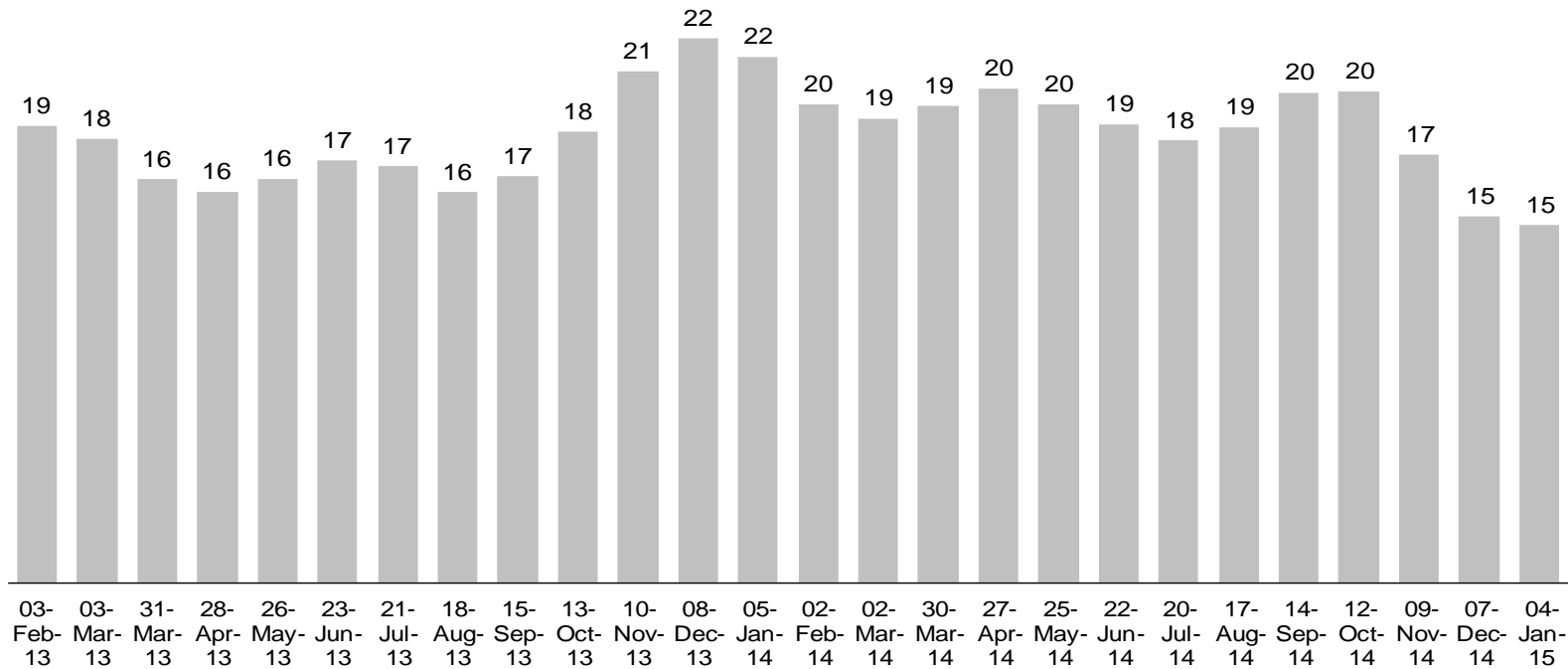
# The Agenda

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



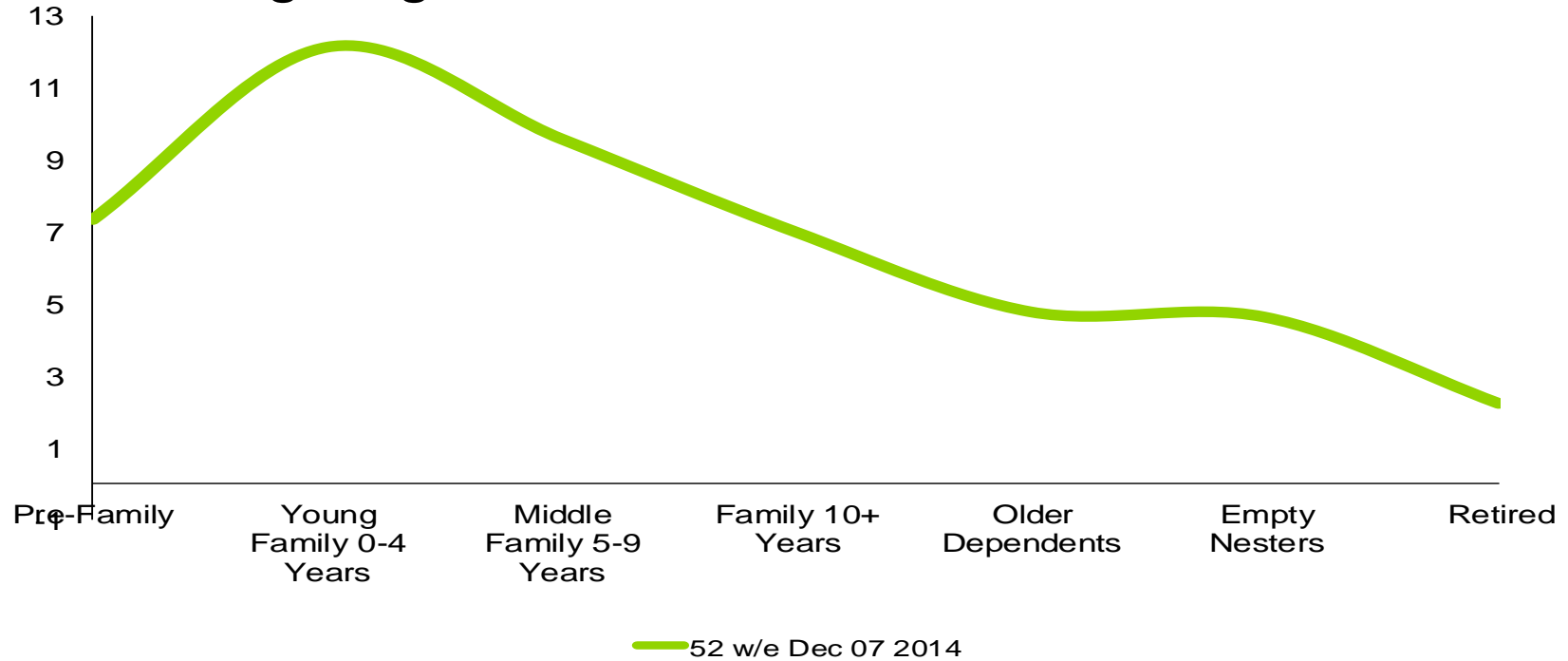


## Total Internet Grocery - Rolling 12 w/e growth

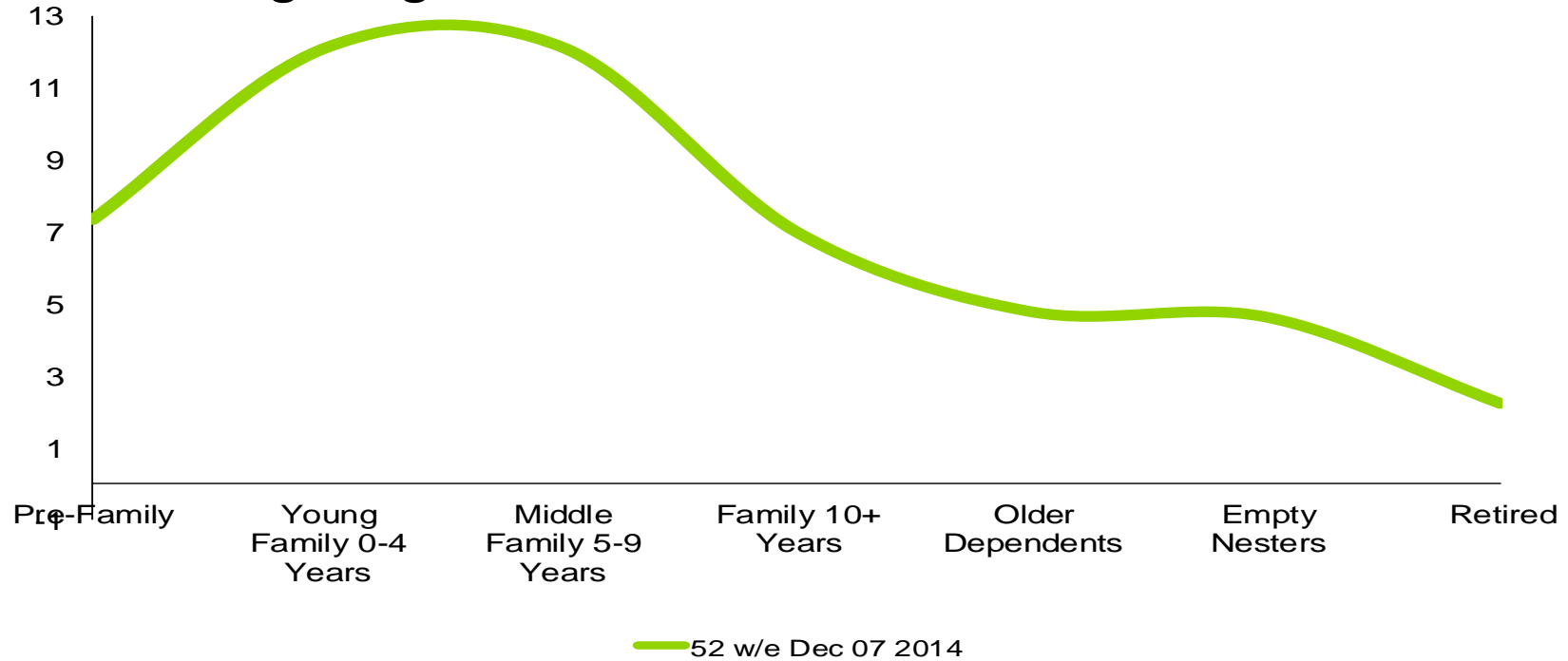




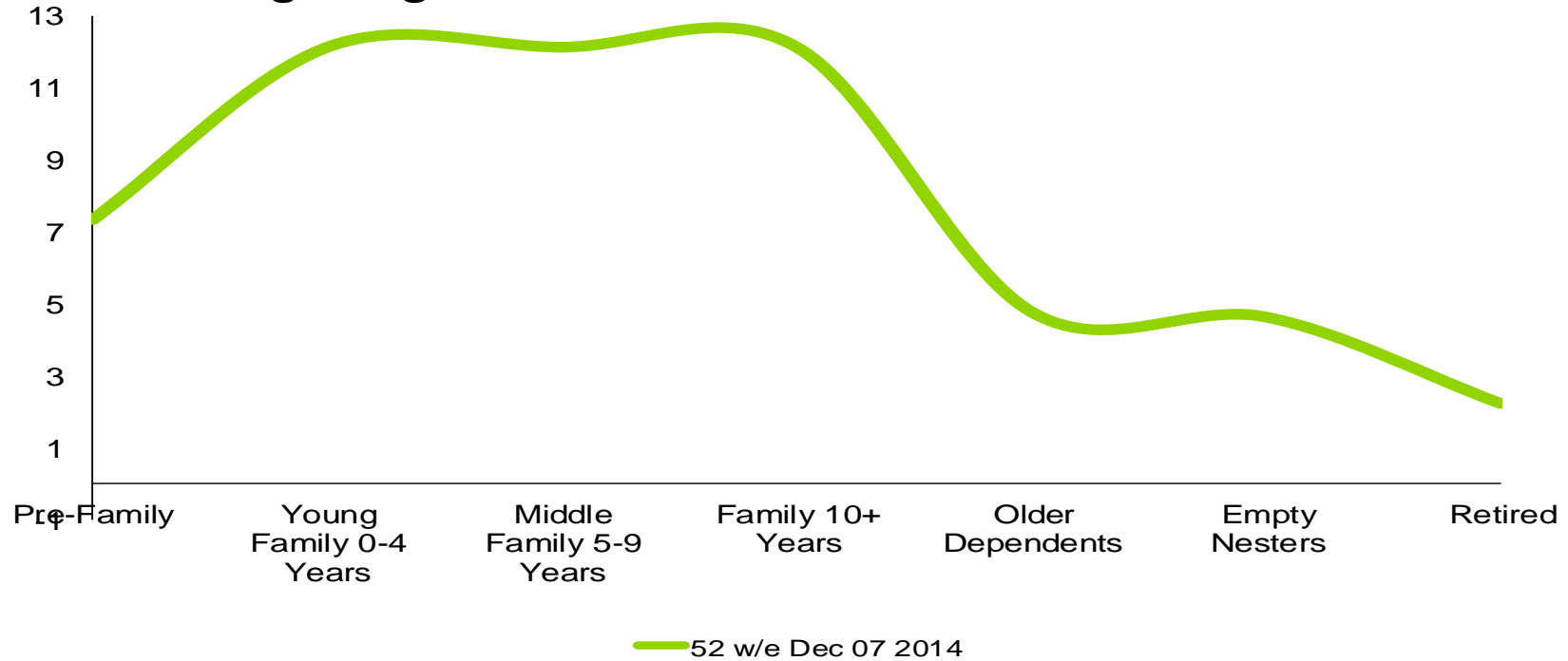
# Total Grocery Internet Lifestage Signatures



# Total Grocery Internet Lifestage Signatures



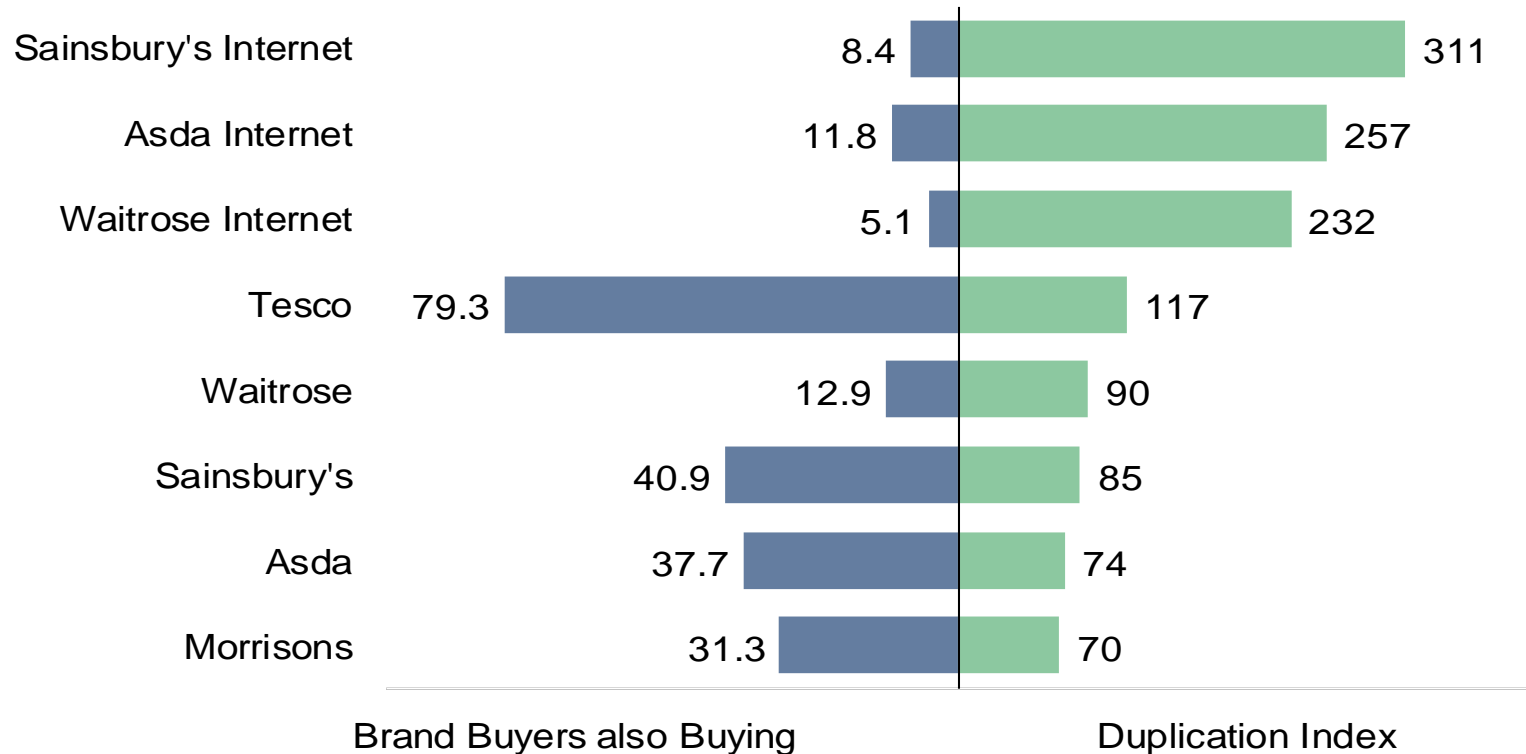
# Total Grocery Internet Lifestage Signatures



# Total Grocery Internet Household Income Signatures



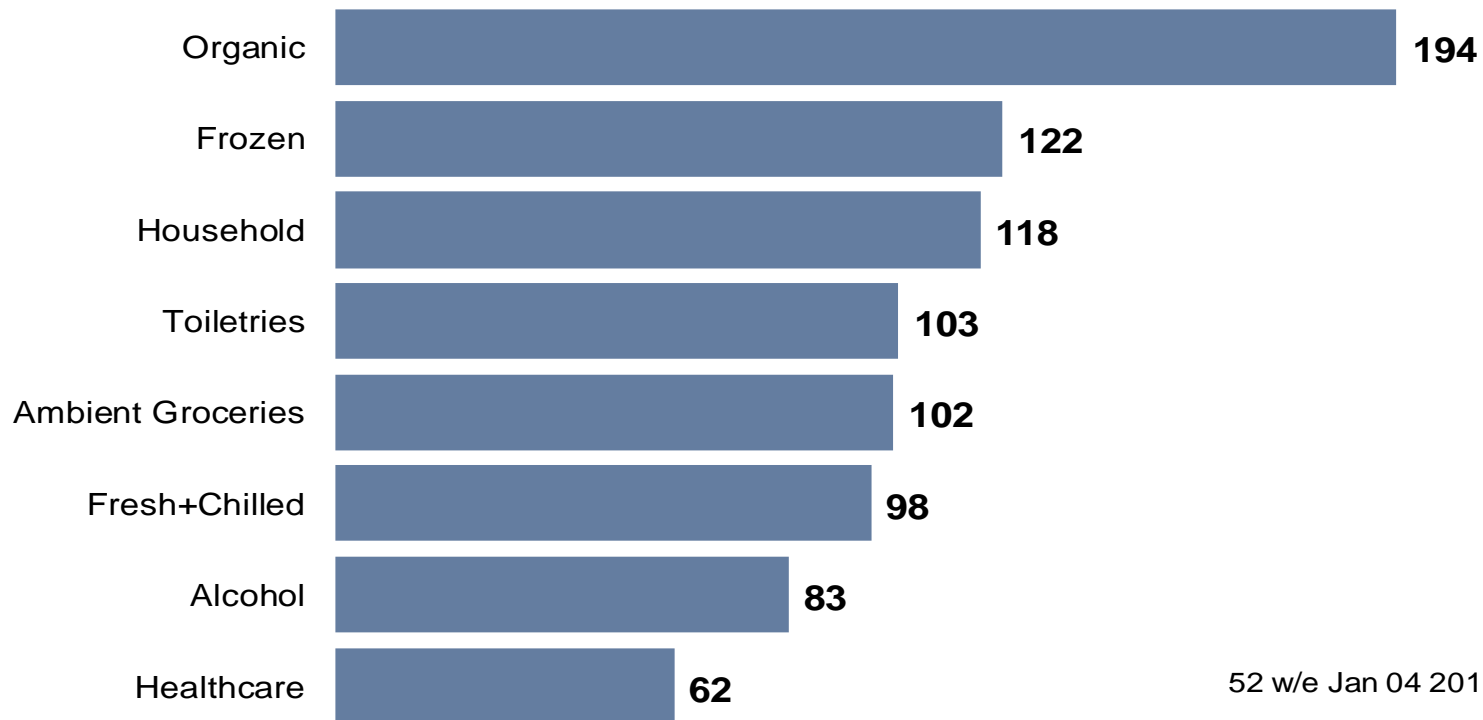
# Till Roll - Duplication by Tesco Internet Buyers



12 w/e Jan 04 2015

## Trading Index

### Internet Delivery



52 w/e Jan 04 2015

Chilled / Fresh





Frozen

BREAD & BAGELS

BREAKFAST

And Jumbo  
Waffles  
99¢



Chilled / Fresh



Frozen



## Trading Index Internet Delivery





Carrefour  
drive



carrefour.fr

bienvenue





# Drive Thru

ASDA.com

Click &  
Collect



# The Agenda

- External pressures
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## In-store theatre









Le chou broc  
ESPAGNE

La bête Paquet  
FRANCE

La bête pied la cardon d'Espagne  
ESPAGNE

La cardon d'Italie  
ITALIE

La cardon d'Italie  
ITALIE

La cardon d'Italie  
ITALIE



















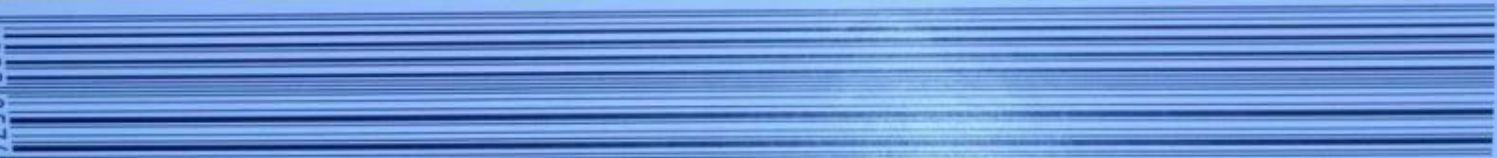






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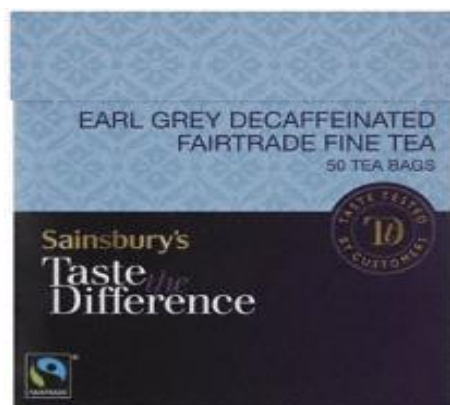


Own-label



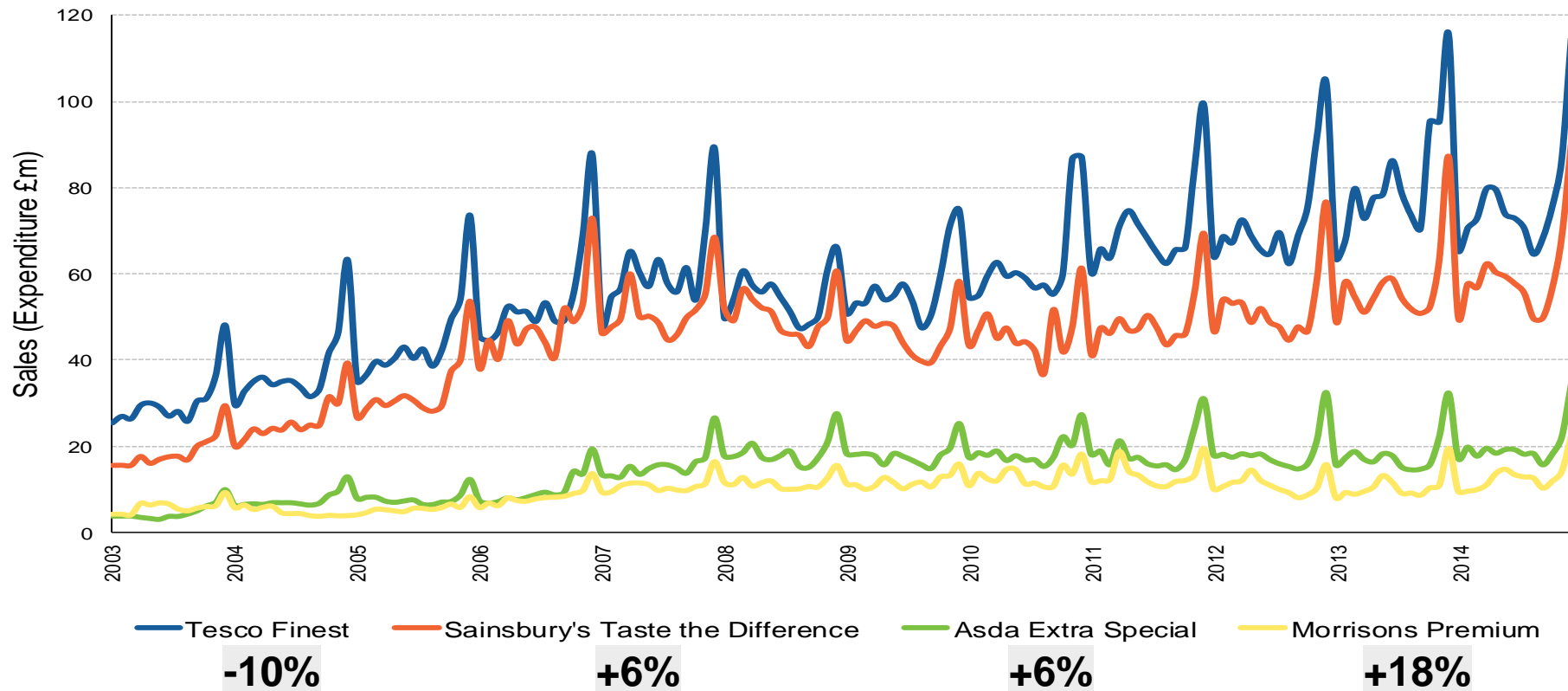






# Premium Own-Label Sales Trends

Latest 12-wk % Change

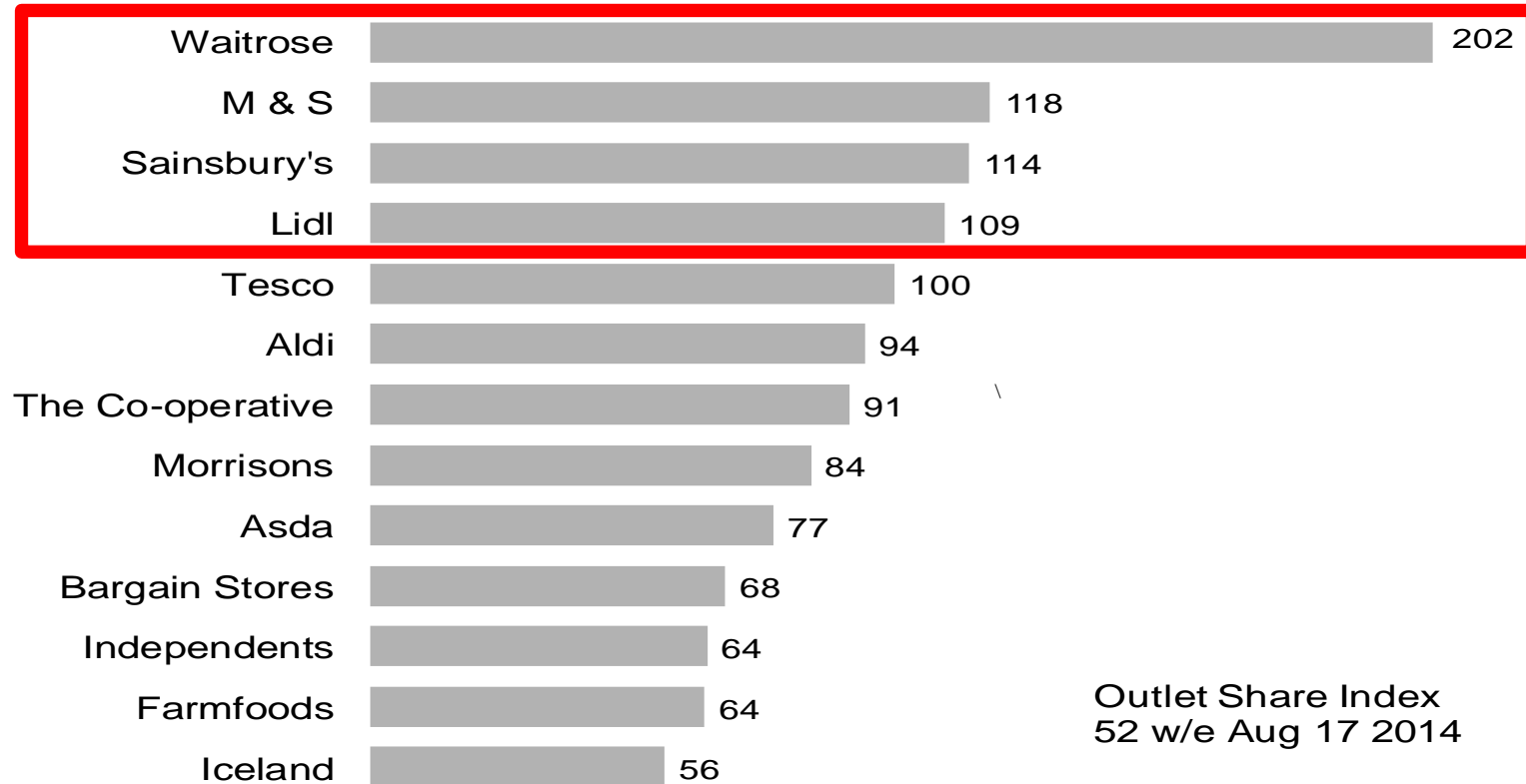


# The Agenda

- External pressures
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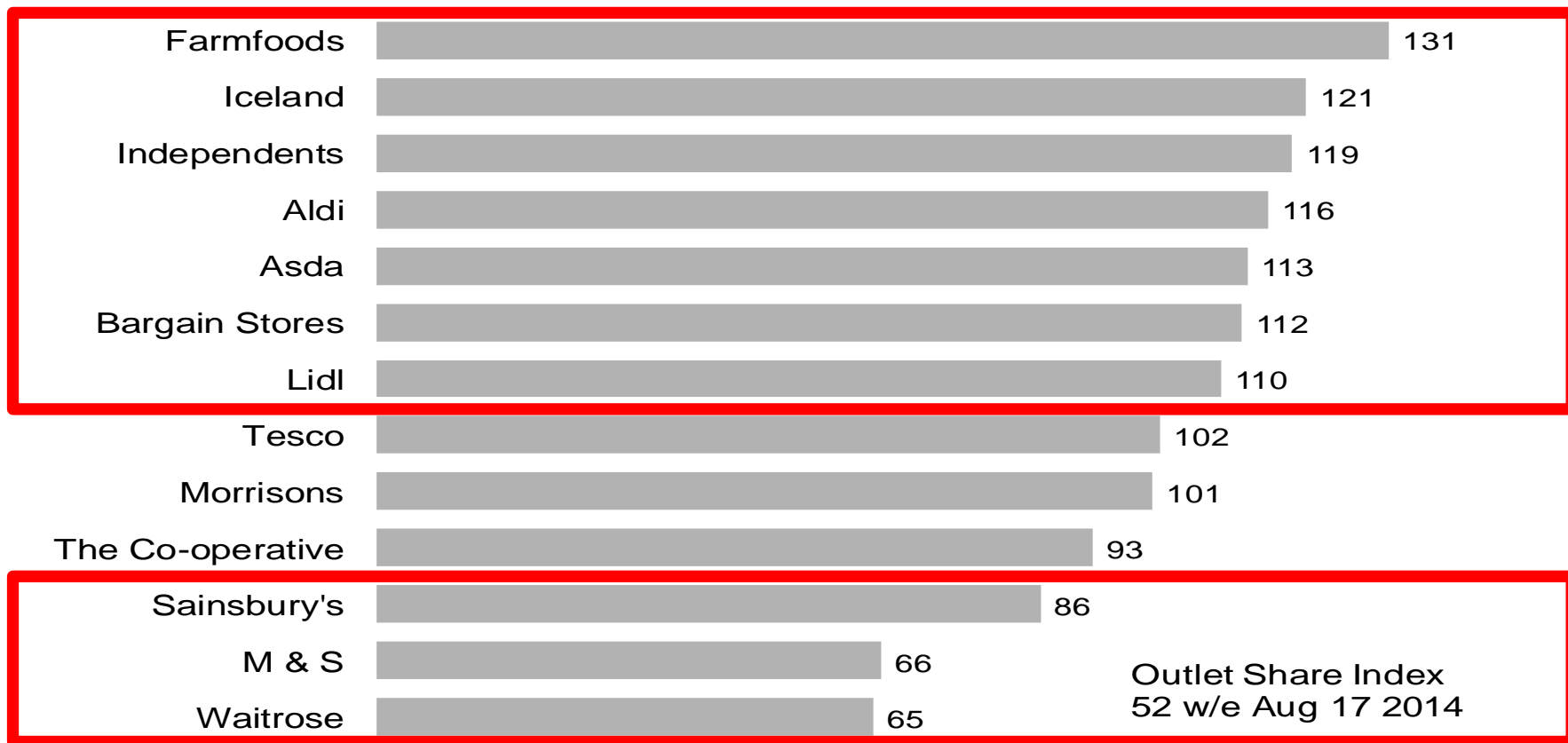


## I regard myself as a connoisseur of food and wine



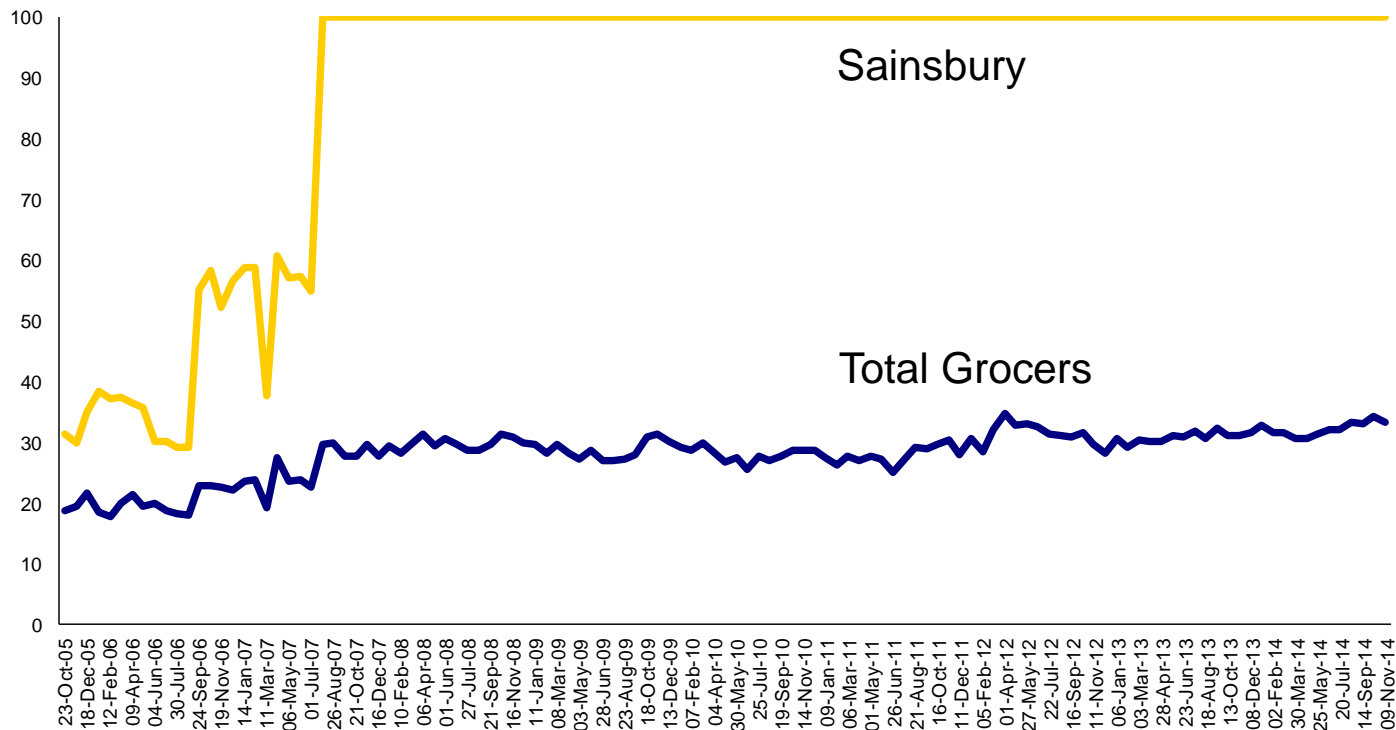
Outlet Share Index  
52 w/e Aug 17 2014

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





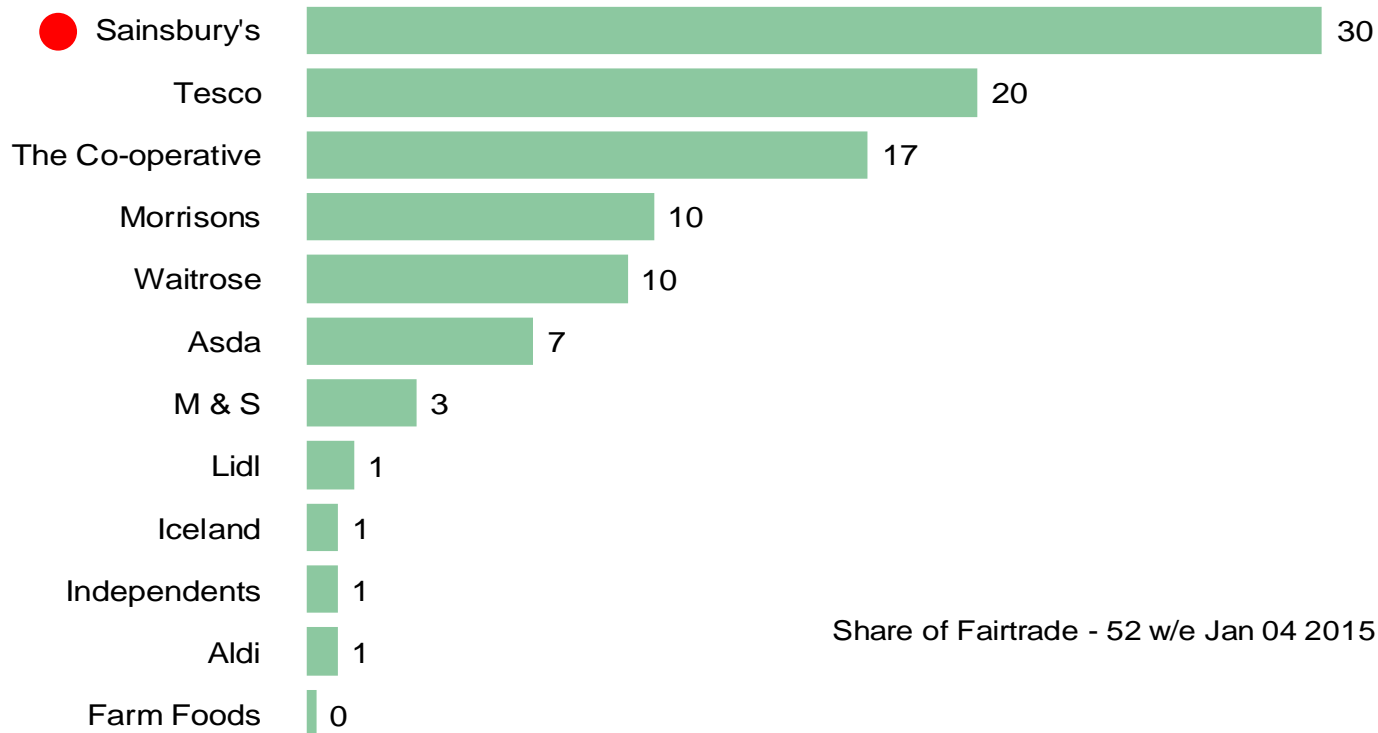
## Fairtrade Prepacked Bananas Market Share





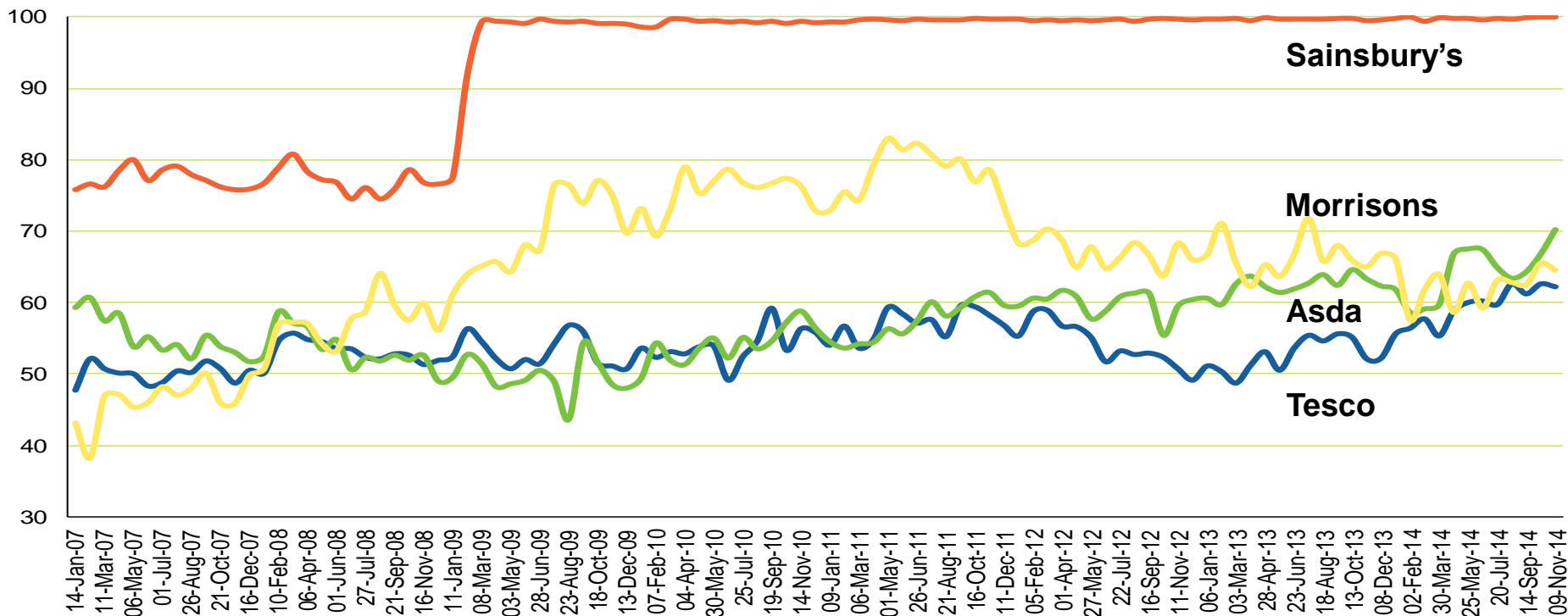


## Fairtrade Shares

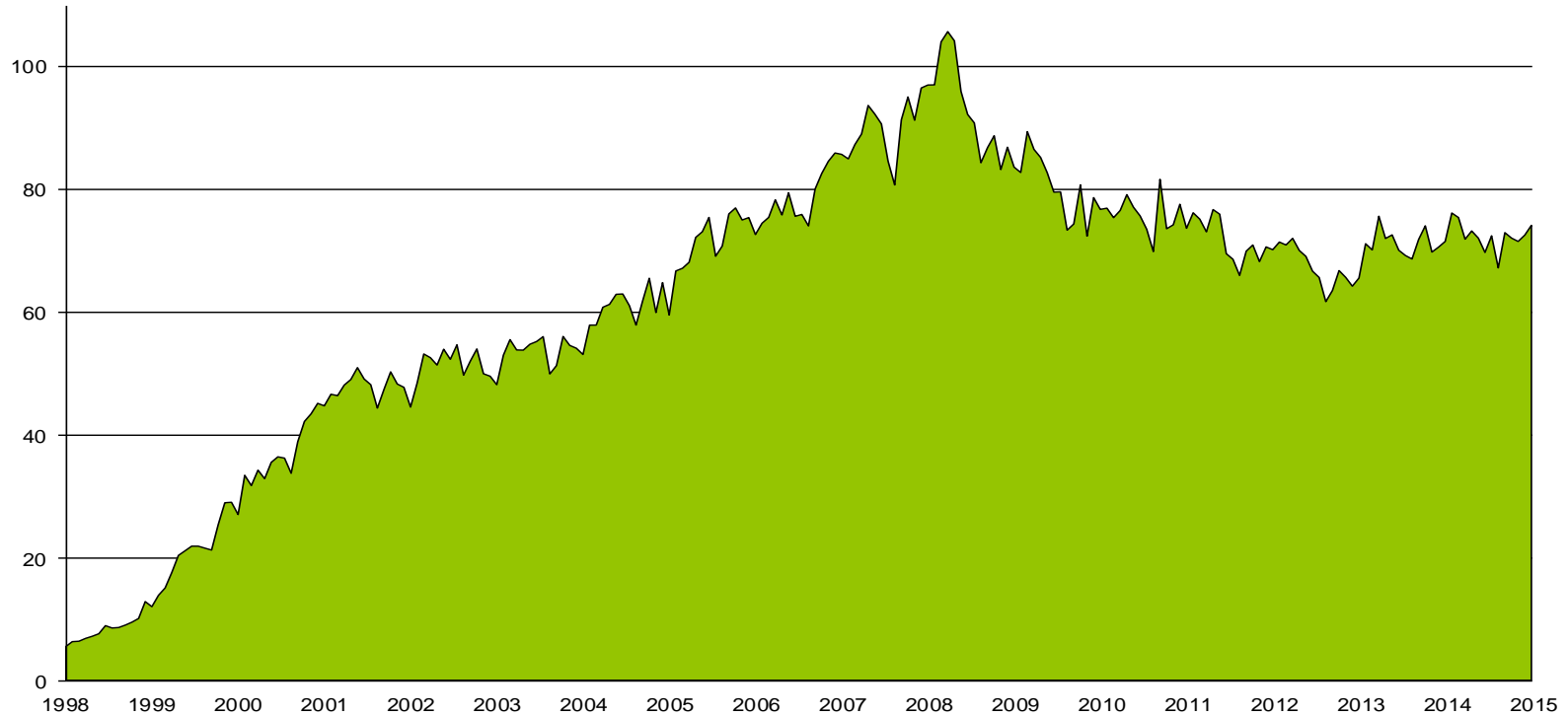


Share of Fairtrade - 52 w/e Jan 04 2015

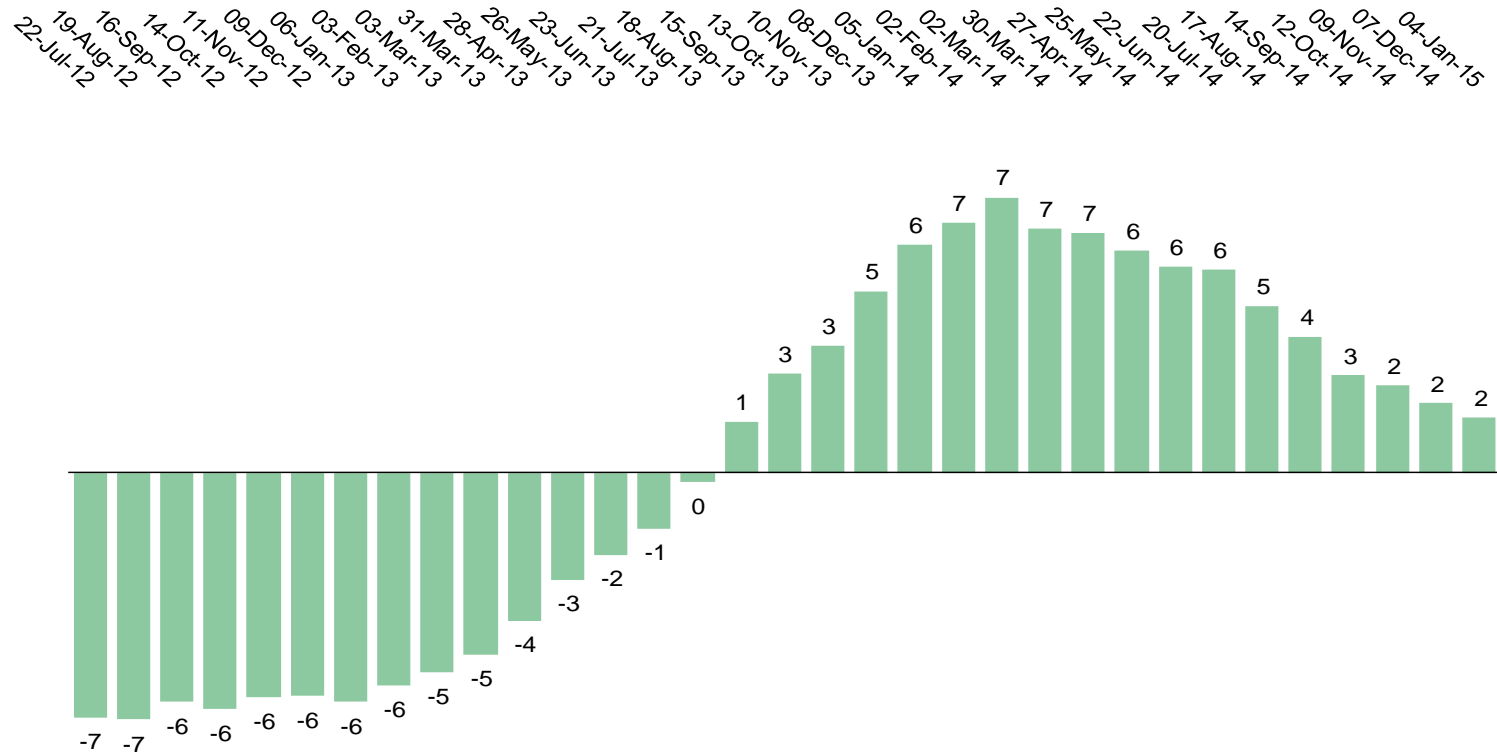
# Not-Caged Eggs Market Share



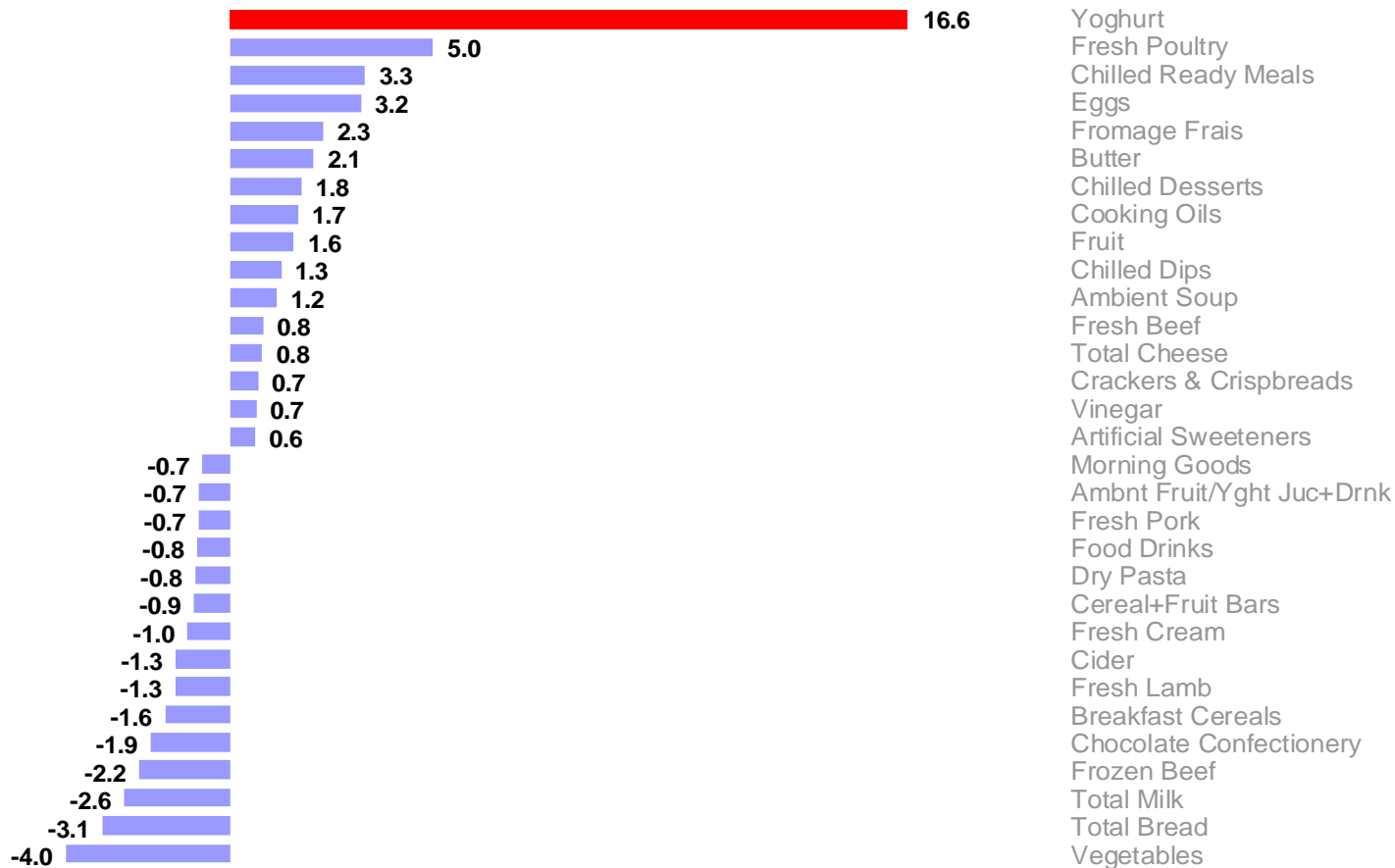
## Total Organic Grocery Products including Baby - 4 weekly £m



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



# Organic Growth - £m - 52 w/e Jan 04 2015

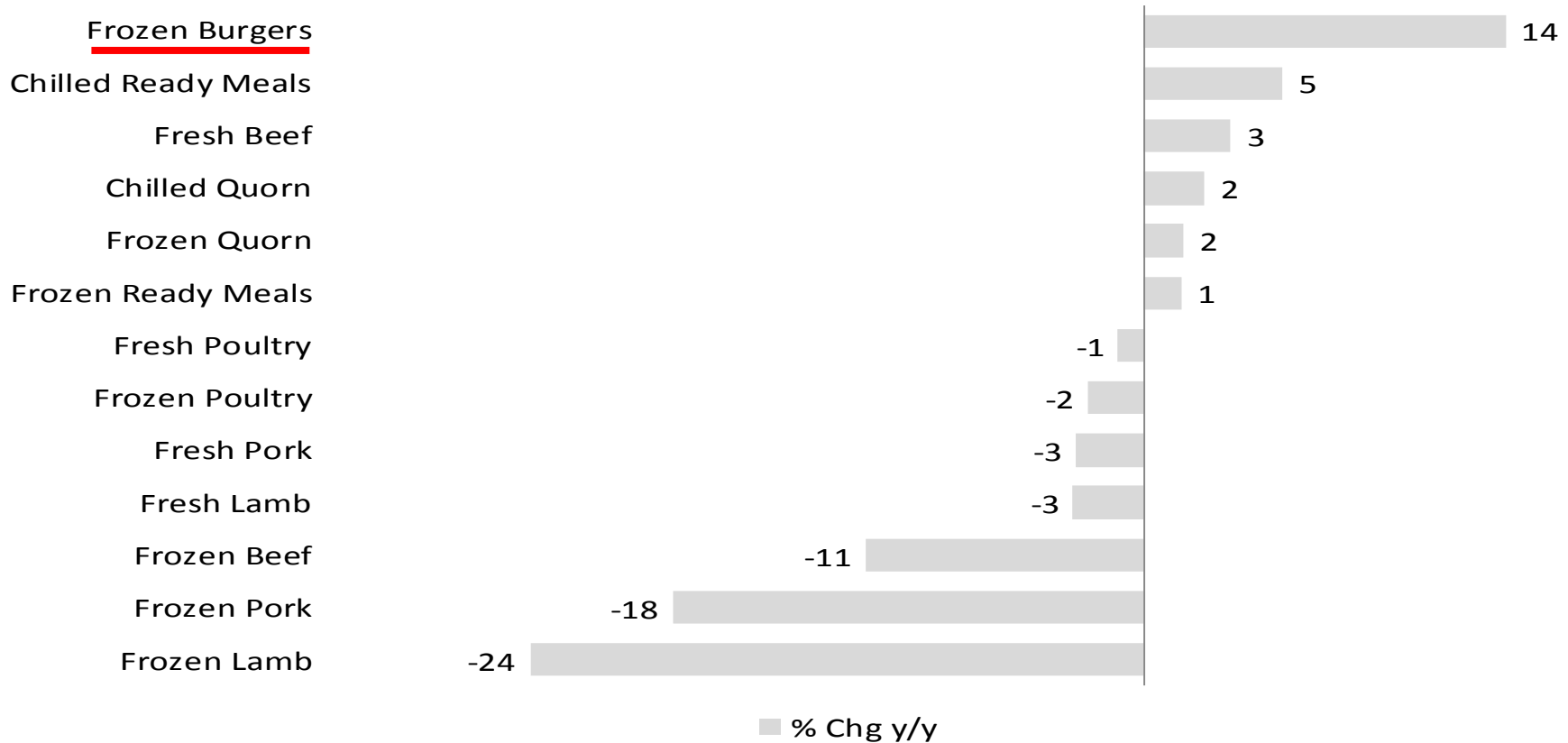


# What happens when low prices rule the supply chain

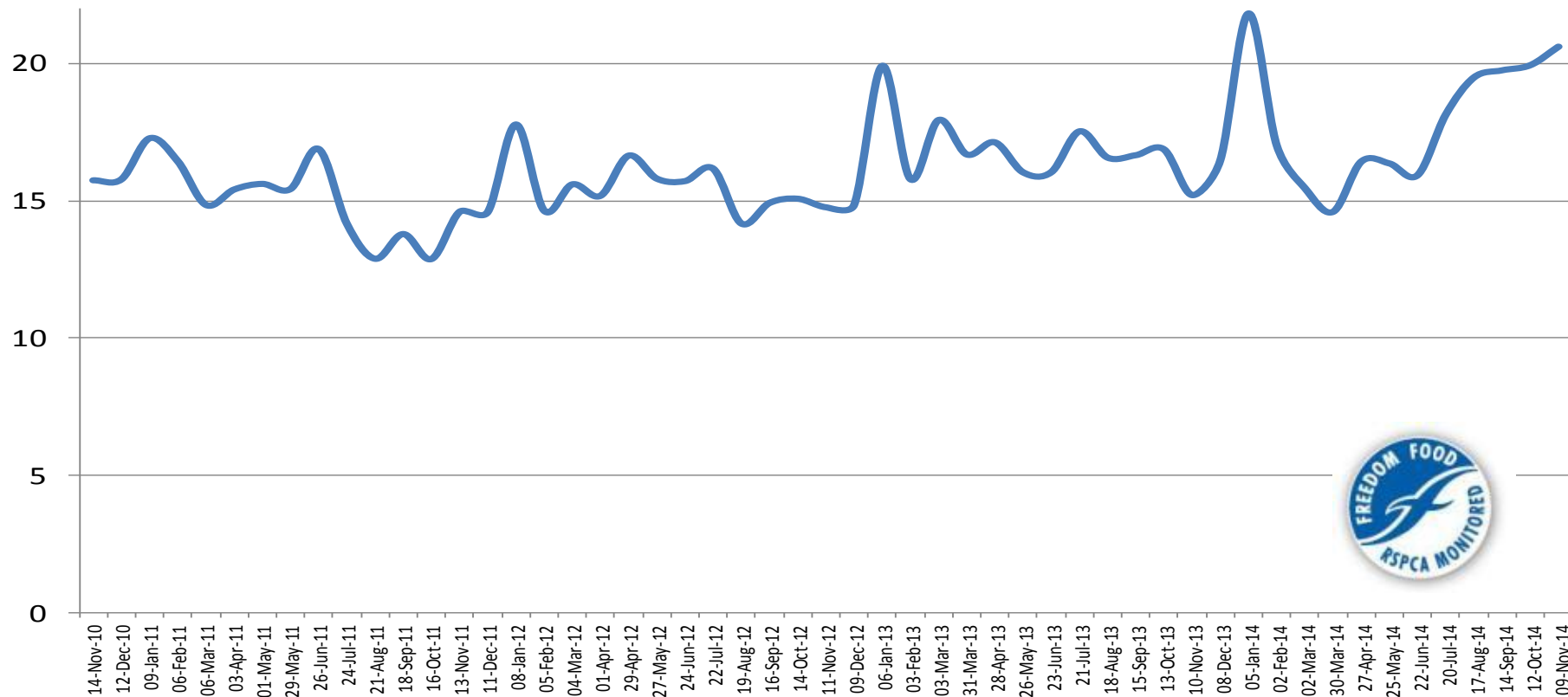




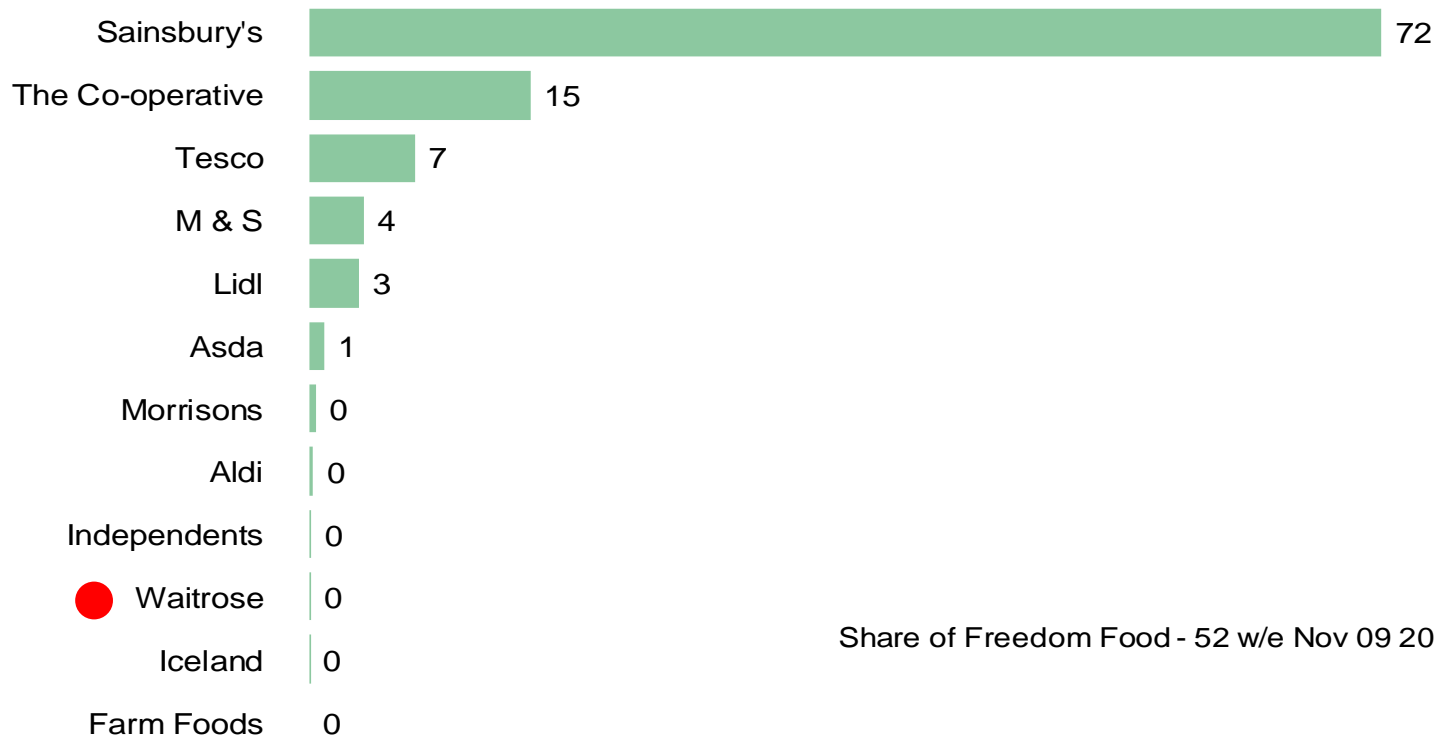
## Impact of the Horsemeat Scandal - 52 w/e Dec 07 2014



## 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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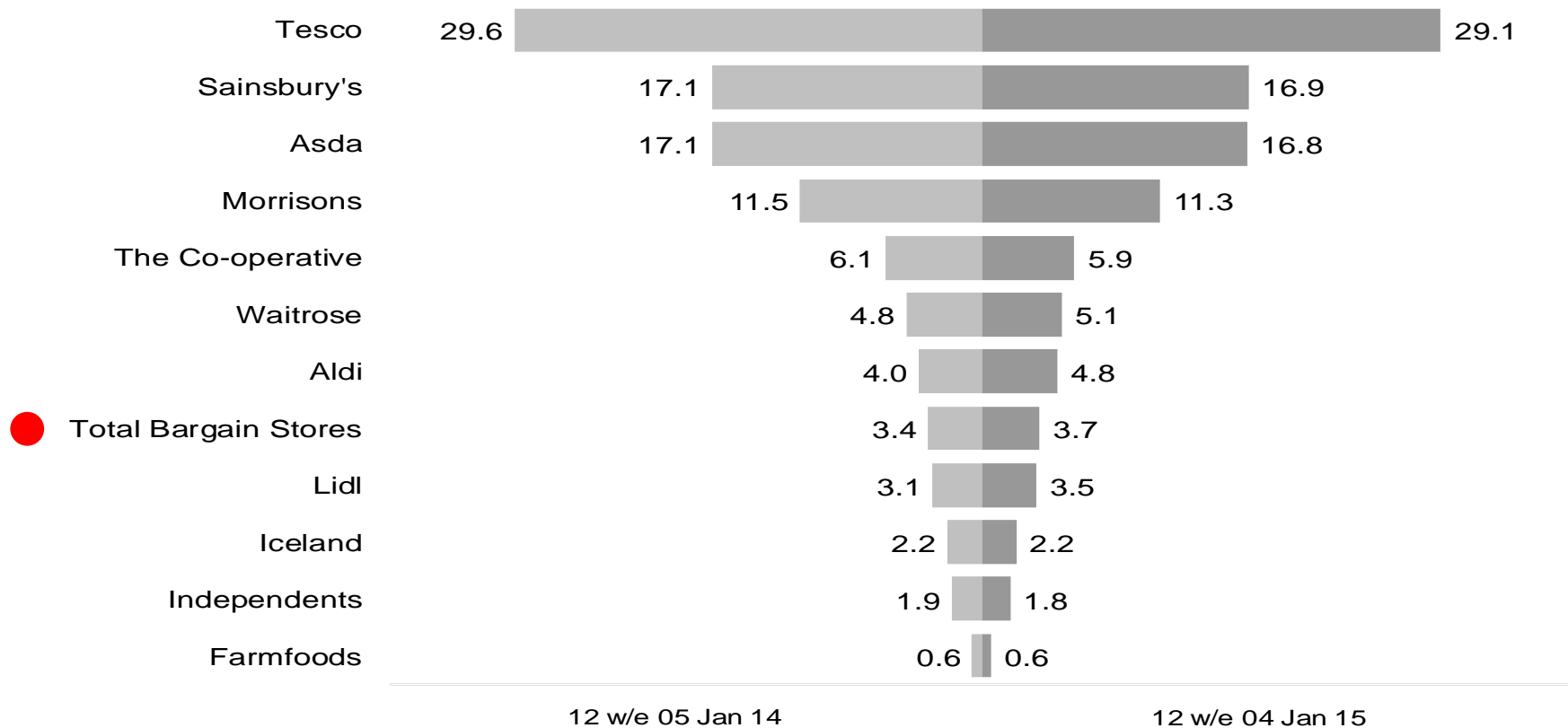


# Till Roll Totals Expenditure Trends



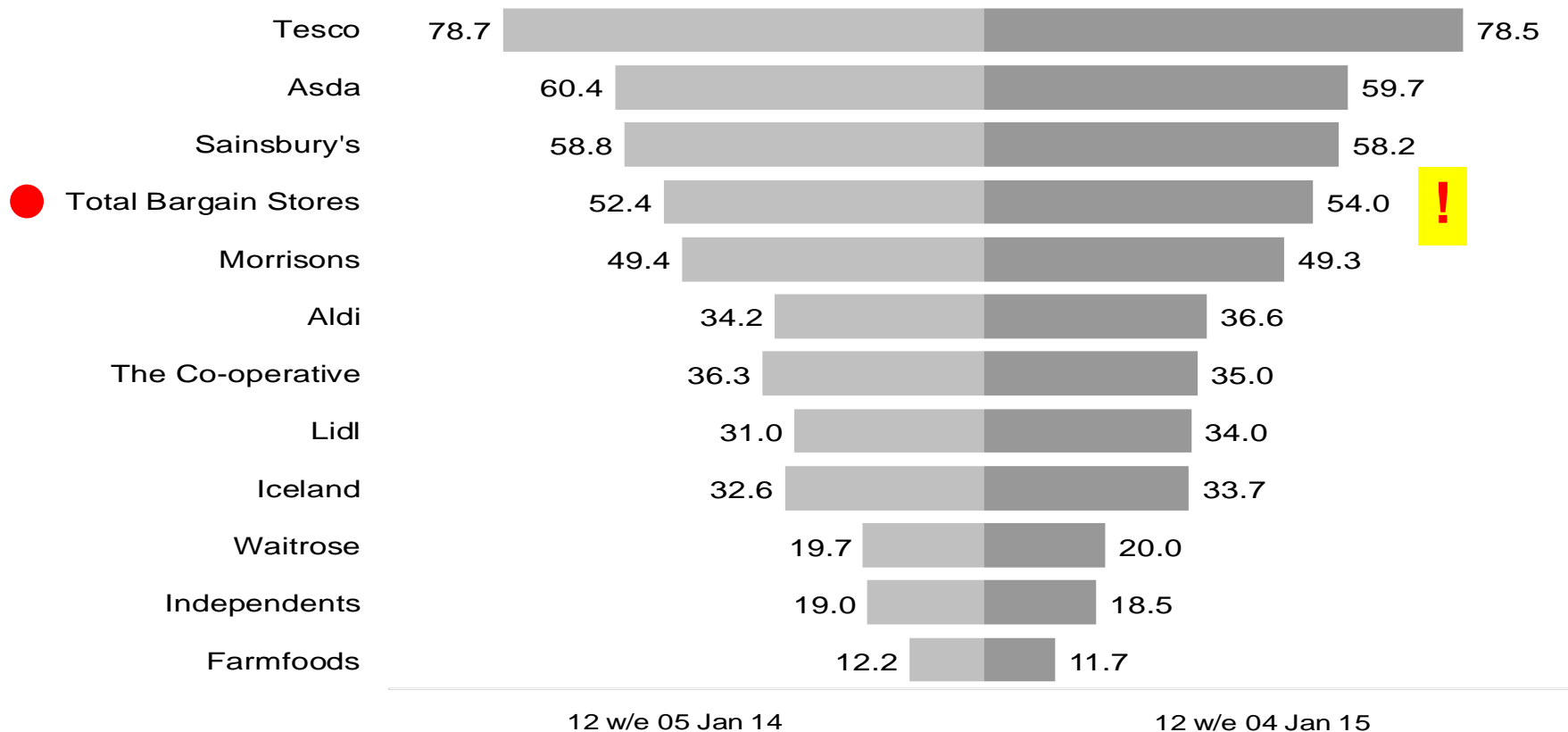
12 w/e 04 Jan 2015 y/y % Change

# Till Roll Totals - Share of Total Grocers

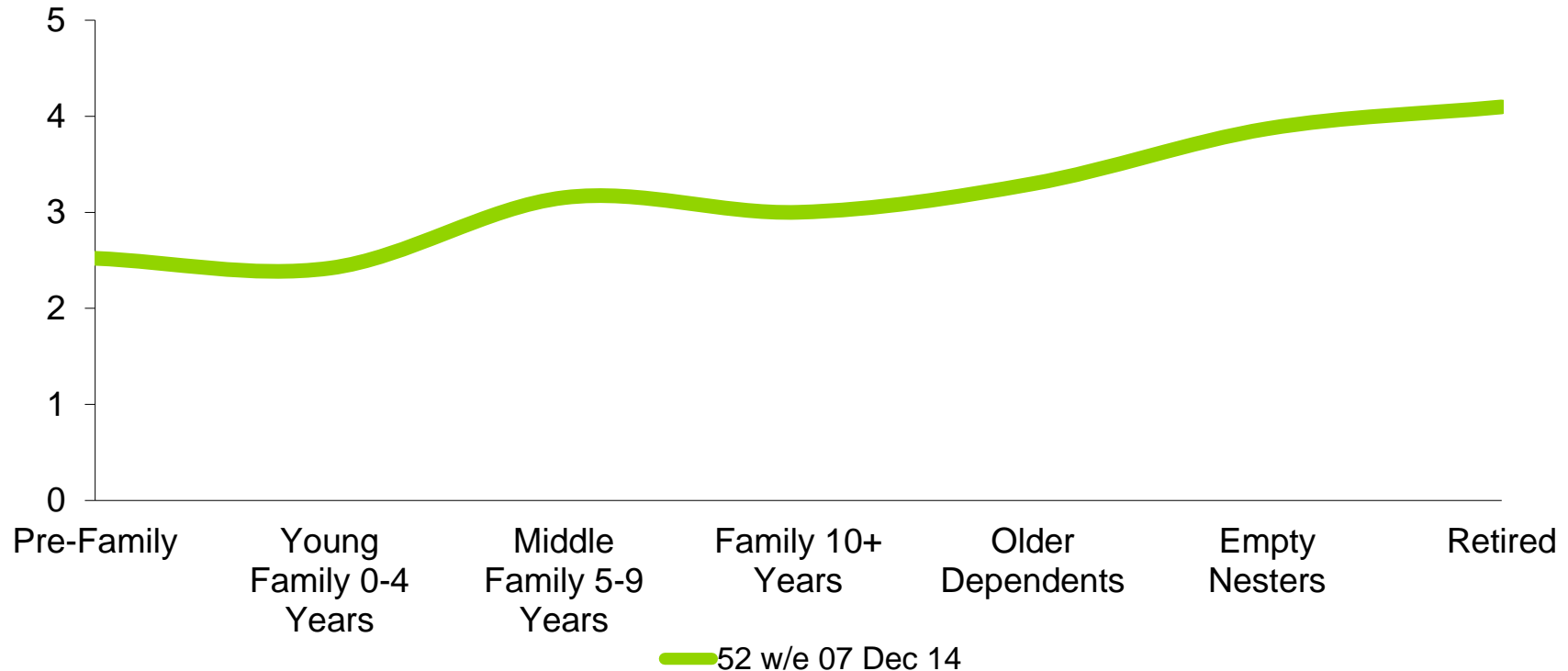




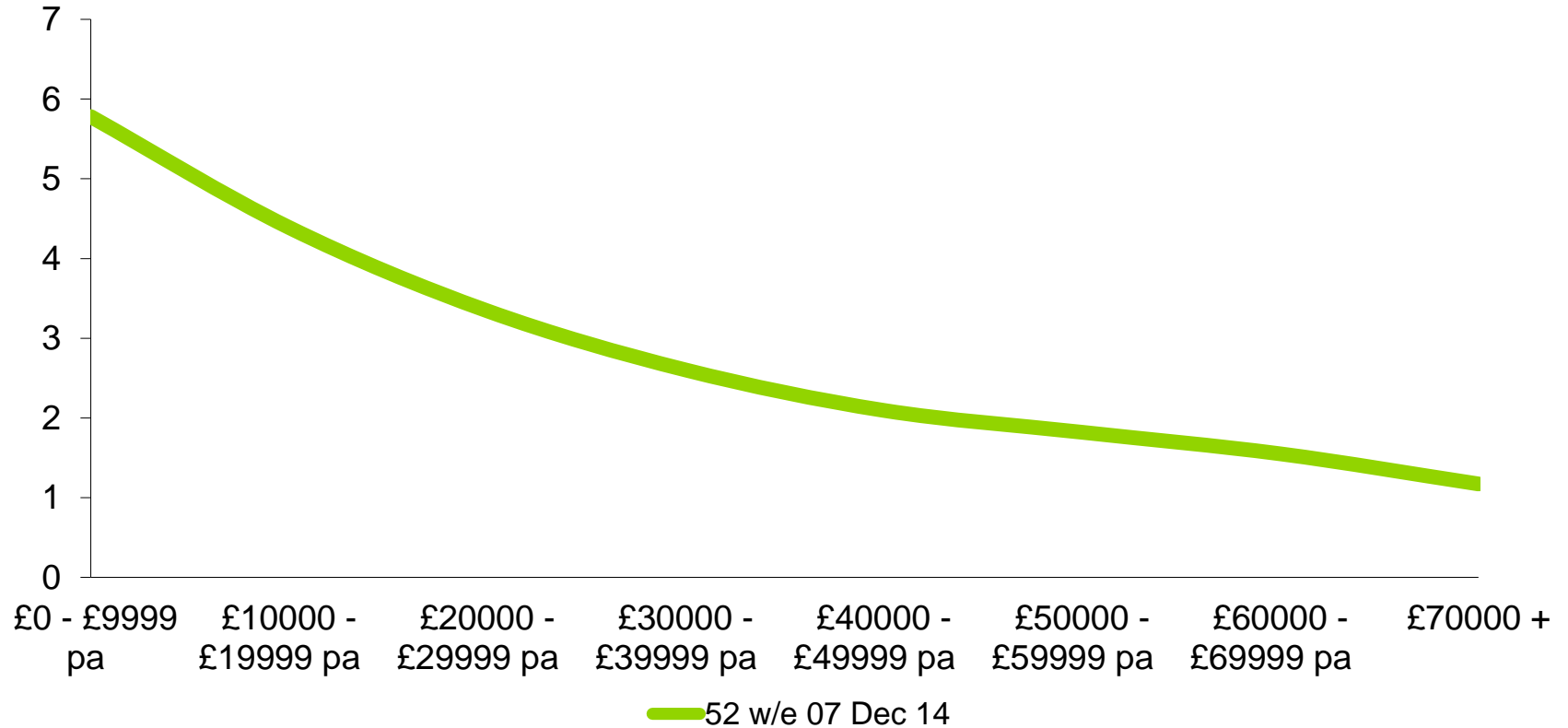
# Till Roll Totals - Penetrations



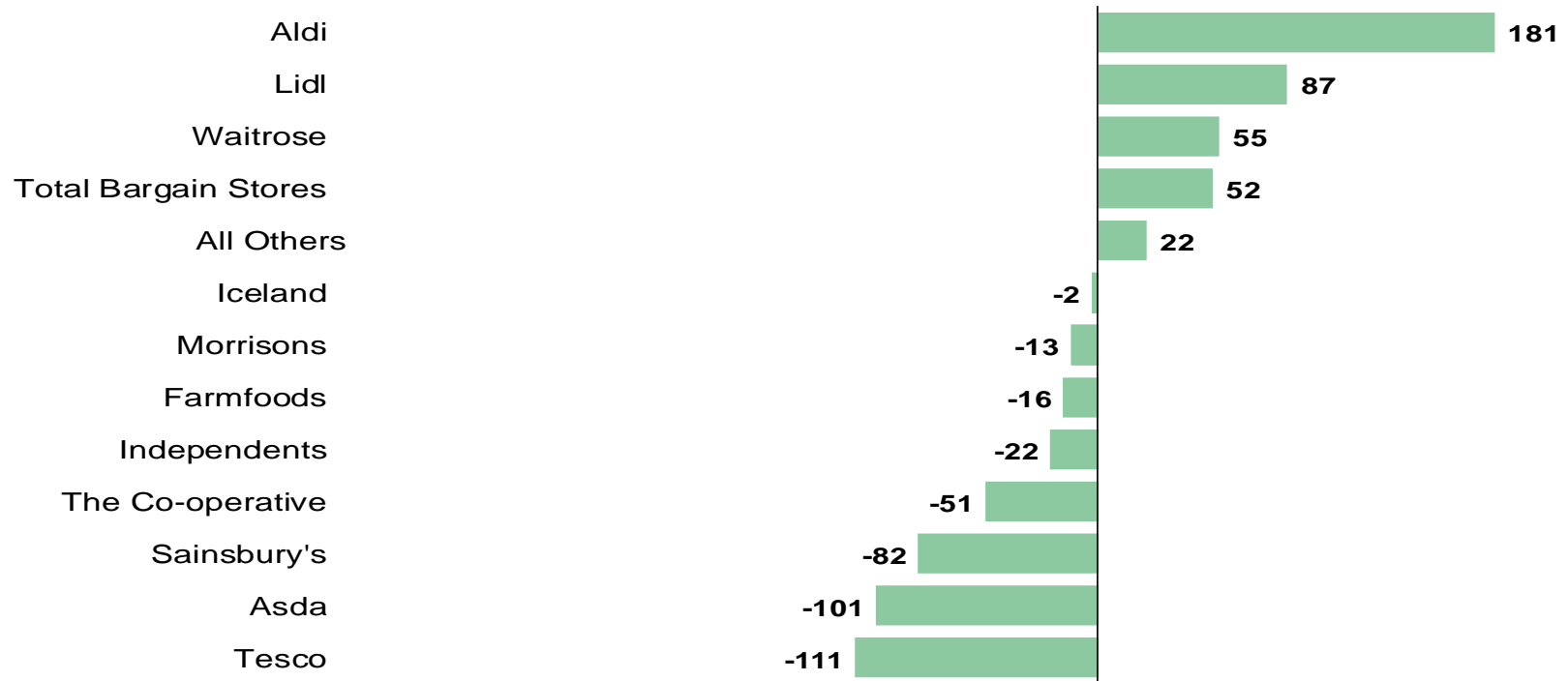
# TOTAL BARGAIN STORES – LIFESTAGE SIGNATURE



# TOTAL BARGAIN STORES – HOUSEHOLD INCOME SIGNATURE



## Till Roll - Total Net Switching Volumes - Summary



Switching - Spend (£m)

12 w/e Jan 05 2014 vs. 12 w/e Jan 04 2015

# GROWTH:

Aldi +30%

Lidl +19%

Waitrose +6%

Tesco Finest -10%

Sainsbury's TTD +6%

Branded Organic +8%

Bargain Stores +12%

Internet +15%



# Market Turmoil :



CEO sacked

43 supermarket closures - 49 developments abandoned

Head Office (Cheshunt) Closure

SFO Investigation

Up to 30% range reduction



1,360 management redundancies

Restructuring of senior team with 5 VPs leaving

2,500 new price cuts



500 Head Office redundancies

1,000 new price cuts



CEO sacked

10 supermarket closures



# KANTAR WORLD PANEL

[edward.garner@kantarworldpanel.com](mailto:edward.garner@kantarworldpanel.com)

twitter edgarner

# **UK RETAIL SEMINAR**

## **Wednesday, 11<sup>th</sup> February 2015**

**Grace Binchy,**  
**Insight & Innovation Specialist, Bord Bia**  
*‘UK Consumer insights & current trends’*