

Nadolig 2017

Roedd Cyfanswm Twf y Farchnad i fyny i +5.4% ym mis Rhagfyr – £511.6M ychwanegol. Daeth hyn trwy gynnydd mewn prisiau ynghyd â thwf mewn cyfaint o +2.6%. Yng **Nghymru**, mae cynnyrch Groser i fyny +7.5%, gan dyfu'n gynt na Chyfanswm Prydain. Mae hyn yn bennaf yn sgil amllder uwch, gyda siopwyr Cymru yn gwneud 19.7 ymweliad ym mis Rhagfyr



Mae **Chwyddiant** wedi chwarae rôl fawr yn y twf, gyda phrisiau i fyny +2.7%. Mae hyn hefyd yn wir yng **Nghymru**, gyda chyfartaledd prisiau i fyny +3.8%.



Gamon oedd cig rhostio mwyaf poblogaidd Prydain dros y Nadolig, gan gyrraedd 26% o Aelwydydd Prydain. **Twrci Ffres** (+6.0%) ac wedi Rhewi (+9.6%) welodd y cynnydd mwyaf mewn gwariant. Yng **Nghymru** tyfodd Twrci +11.2%, a chyrraeddodd Gamon 27.6% o Aelwydydd Cymru.



Gwelodd Nadolig 2017 y treiddiad cyfun uchaf ymhlith yr adwerthwyr **Disgownt** (49.5%) ar lefel Prydain. **Aldi** (+22.4%) a **Lidl** (+19.5%) yw'r adwerthwyr sy'n tyfu gyflymaf ym Mhrydain, ac yng **Nghymru** gydag Aldi +23.8%, a Lidl +17.9% yn uwch.



Tyfodd **Brand yr Adwerthwr** yn gryf ar bob haen, yn cael ei arwain gan Frand Premiwm yr Adwerthwr (+12.4%) a Brand Gwerth am Arian yr Awdwethwr (+8.2%). Tyfodd brandiau +7.3%. Yng **Nghymru** gwelodd y cynnyrch Premiwm dwf o +18.9%, wrth i siopwyr ddewis cynnyrch drytach at y Nadolig.



Cynnyrch **Ffres ac Oer** oedd y cyfrannwr mwyaf at dwf cynnyrch **Groser** ym mis Rhagfyr (+6.8%). Yng **Nghymru Alcohol** oedd y categori oedd yn tyfu gyflymaf (+11.5%) – £10.4M ychwanegol.



Gwelodd siopa **Ar-lein** dwf uwch na'r Prif Siopau ym Mhrydain, gan dyfu +6.2%. Yng **Nghymru**, roedd gan y Prif Siopau bresenoldeb amlycach na'r ar-lein, gan dyfu +6.4% o'i gymharu â thwf ar-lein o +2.1%.



Asda gafodd yr hwb mwyaf ym mis Rhagfyr (+5.5%). Dyma dwf 4 w mwyaf Asda ers Rhagfyr 2011. Yng **Nghymru**, Morrisons sy'n arwain y 4 Mawr, gyda thwf o +10.1%.



Cafwyd y lefelau gwerthiant **cynigion arbennig** isaf erioed dros y **Nadolig** ar 36% o bryniannau. Yng **Nghymru**, roedd lefel y cynigion arbennig yn 35.4%.

Christmas 2017

Total Market Growth was up to +5.4% in December – an extra £511.6M. This came through price increases as well as volume growth of +2.6%. In **Wales** Grocery is up by +7.5%, growing ahead of Total GB. This is largely due to higher frequency, with Welsh shoppers making 19.7 trips in December



Inflation has played a large role in growth, with prices up +2.7%. This is also the case in **Wales**, with average prices up by +3.8%.



Gammon was Britain's most popular roasting joint this Christmas, reaching 26% of GB Households. Fresh (+6.0%) & Frozen (+9.6%) **Turkey** saw the largest increases in spend. In **Wales** Turkey grew at +11.2%, whilst Gammon reached 27.6% of Welsh HHs.



Christmas 2017 saw the highest combined **Discounter** penetration (49.5%) at Total GB level. **Aldi** (+22.4%) and **Lidl** (+19.5%) are the fastest growing retailers at Total GB level, as well as in **Wales** with at Aldi +23.8%, Lidl +17.9% growth.



Own Label was in strong growth across all tiers, led by Premium own label (OL) (+12.4%) and Value OL (+8.2%). Brands grew at +7.3%. In **Wales** Premium tiered OL saw growth of +18.9%, as shoppers traded up at Christmas.



Fresh & Chilled was the largest contributor to Grocery growth in the month of December (+6.8%). In **Wales Alcohol** was the fastest growing category (+11.5%) – an extra £10.4M.



Online shopping saw higher growth vs. **Main Store** in Total GB, grew at +6.2%. In **Wales**, Main Store shops had a higher presence vs. online, growing at +6.4% compared to online growth of +2.1%.



Asda had the largest uplift in December (+5.5%). This is Asda's highest 4 w/e growth since December mas 2011. In **Wales**, Morrisons leads the Big 4, with growth at +10.1%.



Lowest Christmas promotional levels ever at 36% of purchases. For **Wales**, Christmas promotion levels were at 35.4%.