The Insight Programme

Research resources for the Food and Drink Industry in Wales

Brookdale CONSULTING

Category Insight

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Food & Drink Wales

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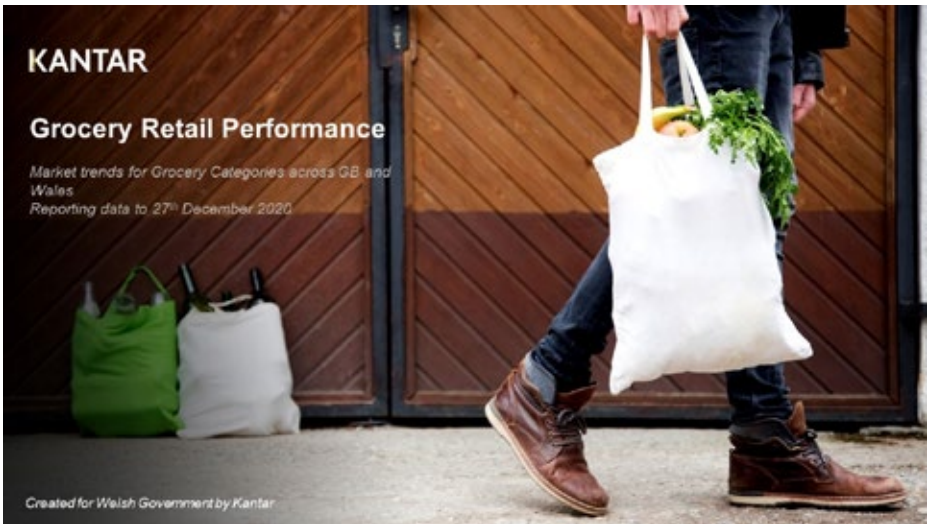
KANTAR REPORT: 2021

2021 Grocery Retail Performance

An overview of the total market in GB and Wales and across key subsectors in 2020.



Key Points of Interest:

- Unusual year due to COVID-19 – GB Grocery market saw its strongest growth and shoppers changed their behaviour to bigger, less frequent trips
- Online performance vs total market – by retailer and sector (GB vs Wales)
- Tesco dominates online groceries, holding over a third of sales

- Total Grocery
- Total Meat and Meat Products
- Total Dairy and Dairy Products
- Total Bakery
- Total Beverages
- Total Fish and Seafood
- Total Cereal, Grains and Pulses
- Total Fruit and Vegetables
- Total Oils and Fats
- Animal Food

Each of the above sub sectors are broken down into the following analysis:

- GB and Welsh Key market overview including penetration, volume, frequency, value
- GB and Welsh Retailer performance
- GB and Welsh shopper profile overview

Links to other relevant reports:

Kantar Report: The Shopper of the Future (2020)

Kantar Report: Grocery Retail Performance (2020)

Kantar Report: Out of Home Review (2020)

Insight Programme Report: Value of Welshness (2020)

Kantar Report: Sustainability Report – Who Cares, Who Does (2020)

businesswales.gov.wales/foodanddrink

KANTAR REPORT: 2021

Our Nation Out of Home

Out of Home performance overview for 2020, including a focus on the ongoing impact of the COVID-19 pandemic

Key Points of Interest:

- Overview of 2020 and quantifying the decline in OOH for Wales and GB
- Grocery benefited from the OOH decline – but this was not enough to offset the losses seen in OOH
- OOH spend dropped by 73% at its lowest (compared to 2019)
- Detailed charts on the change in number of trips and shoppers
- Declines driven by frequency and penetration dependent on the channel
- Quick Service Restaurants (QSR) was the only channel to see value as well as share growth – detailed charts on this
- Lockdown restrictions changing work routines and footfall in transport hubs
- The different profile of the work from home consumer – more likely to have higher affluence
- There is still a substantial number of trips to be won from current lockdown commuters – size of the opportunity is laid out
- Shift in the purpose of food to go – it becomes more treat-driven than about functionality
- Quantifying the growth in takeaway home deliveries – in Wales and GB
- Lunch has seen a steady growth in share of at-home delivery occasions
- Takeaway delivery is seen to be a long-term shift in behaviour

Note – This presentation was given as part of the Welsh Government's Insight Conference 2021. A recording of this presentation is available on the Food & Drink Wales Members Area

Links to other relevant reports:

Kantar Report: The Shopper of the Future (2020)

Kantar Report: Grocery Retail Performance (2020)

CGA Report: 2021 On-Trade Drinks Performance and Trends

The Food People: 2021-2022 Top Ten Food and Drink Trends

businesswales.gov.wales/foodanddrink

SUSTAINABILITY TRANSFORMATION 2021

Summary of Kantar Sustainability Webinars

A report from the Insight Programme pulling together recent Kantar presentations on sustainability

Key Points of Interest:

- Changing priorities for consumers – survey chart
- The importance of the power of brand purpose
- 'Shield and Sword' technique for building sustainability strategies
- What influence can your brand have within your industry?
- Investigating brand equity
- Reputation as a halo effect – are you authentic, effective, and committed?
- Issues which directly impact your industry impact your brand reputation
- Shifting attitudes in the purpose of business – shareholders, corporate social responsibility and forming a part of society
- Responsibility and leadership are key in building brand equity
- Responsibility is now 3x more important to corporate reputation than 10 years ago
- Consumer poll – what are the key issues that companies and brands should worry about?
- If brands want to matter, they need to understand their audiences, what matters to them, and their own role in this
- Brands need purpose – graph showing that this is important to consumers from all age groups
- The value of consumer diversity
- New consumer profiles: Eco Actives, Eco Believers, Eco Considerers and Eco Dismissers.
- Nearly 1 in 3 shoppers in Wales are Eco Actives
- Brands can enable people to close the value action gap through their choices & provide a vehicle of scale
- Eco-Actives act on their beliefs and help brands to achieve strong growth – examples of brands who have achieved this
- Being an eco-active brand does not necessarily limit your consumer base
- Summary – choose your sustainability concern, build a path to show actions, commit to the cause and truly connect with your customer base

Links to other relevant reports:

Kantar Report: The Shopper of the Future (2020)

Kantar Report: Grocery Retail Performance (2020)

Kantar Report: Sustainability Report – Who Cares, Who Does (2020)

businesswales.gov.wales/foodanddrink

CGA REPORT: 2021

On-Trade Drinks Performance and Trend

GB and Wales market overview for On-Trade drinks in 2020, and prediction of upcoming trends in 2021

Key Points of Interest:

- Quantifying the impact of lockdowns in the past year – an annual loss of over £70 billion
- Summary of the structure of Welsh On-Trade
- Macro consumer challenges in 2020
- Consumers would feel most comfortable going out for catch ups, to celebrate or as a couple rather than to watch sport or go to concerts
- An overview of the challenges of lockdown 3.0
- Restaurants are the number 1 venue GB consumers are most looking forward to visiting post-lockdown
- Trading restrictions increased the importance of with food occasions – therefore driving relevance here will be key for all drinks categories
- Cocktails can play an important role in the 'with food' category
- Over half of GB consumers who have been sitting outside would continue to do so
- Consumers are staying closer to home to avoid long journeys and support local business – how can we prepare for and utilize this?
- There is a desire to 'shop local' – many brands have grown share within their regional heartlands
- Detailed charts on the performance of different drinks categories in Wales and GB in 2020
- Looking ahead to 2021 – consumer confidence statistics
- 1/3 consumers intend to 'go out as much as possible' once restrictions are lifted
- Split attitudes to spending – 17% of consumers will plan to be more careful with their spending while 21% plan to 'treat themselves' when they go out to eat and drink again
- Lessons from 2020 and opportunities for 2021

Note: This presentation was given as part of the Welsh Government's Insight Conference 2021. A recording of this presentation is available on the Food & Drink Wales Members Area

Links to other relevant reports:

Kantar Report: The Shopper of the Future (2020)

The Food People: 2021-2022 Top Ten Food and Drink Trends

Drinks Cluster Presentation: 2021 Using Insight in the On-Trade to Trade Better

Kantar Report: 2021 Our Nation Out of Home

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EUROMONITOR PRESENTATION: 2021

Markets that will renew quicker and emerging GB categories that could be ripe for export

Outlines the current state of UK food & drink exports and investigates the post COVID-19 economic outlook as well as future export trends to look out for.

Key Points of Interest:

- Why should businesses export? The key benefits of export
- Global export overview – value changes, trade tensions and an overview of the countries which are the largest exporters
- Top 10 exporting countries and top 10 fastest growing exporters (pre pandemic)
- Top exporting and importing countries within food, beverages and tobacco
- A detailed breakdown of the UK's exporting profile – 4.3% of UK exports are foodstuffs
- Top 10 UK export destinations for 2020 – charts showing the impact of COVID-19 on UK exports
- Top trends impacting economies, businesses, and consumers
- Global economic outlook – details of the forecasted global economic recovery
- Key risks are diminishing in probability – positive trend to continue
- Maps to show the predicted varied global economic recovery in Q4 2021
- UK annual real GDP growth has positive outlook due to restriction easing and vaccine progress
- Summary of trends which were accelerated/decelerated due to COVID-19
- Key trends and the future UK food and drink market – predicted UK retail volume
- In depth analysis of key current and future food and drinks trends in the UK and the priority export markets for each category
- Key trends discussed in more detail are: Health and Wellness, Fortified/ Functional, Free-From, In-home eating, Permissible Indulgence, Bottled Water, health/wellbeing/mindfulness across drinks, Non-alcoholic beer
- Conclusions – key signs of global recovery, which countries will recover first and the UK predicted recovery map, key trends and recommended markets

Note: This presentation was given as part of the Welsh Government's Insight Conference 2021. A recording of this presentation is available on the Food & Drink Wales Members Area

Links to other relevant reports:

BIC Innovation Presentation: Getting into Exports Presentation: 2021 Getting into Export and New Markets in Export

Kantar Report: 2021 Grocery Retail Performance

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THE FOOD PEOPLE

2021-2022 Top Ten Food and Drink Trends

A summary of key future food and drink trends and identifying trends that consumers will engage with.

Key Points of Interest:

- 2021/2022 trends wheel showing global drivers, 4 social and cultural forces, 11 food and beverage mega trends and 60 ways in which these trends will manifest. This shows an overview of the origin of the 10 top food and drink trends
- Mini Splurge and Thrift – thrifty consumer habits for cost and environmental reasons, but the lipstick effect and touches of luxury also come into effect
- Comfort – baking, 'carb comeback', leisurely breakfasts
- Home Delivery – food delivery has been accelerated due to pandemic. New opportunities for partnerships and collaborations
- Fired Up – grills and international cuisine, expression of craft and experimentation
- Healthy Gut – gaining even more traction as we learn about the link between our guts, immune function, and mental health. Kombucha, kefir and fiber are all linked to helping immunity
- Better Mind – the rise of CBD (product examples)
- Alfresco Cooking and Dining – outdoor cooking
- Frozen – cuts across all ages, convenient, budget-friendly and the revival of the food pantry
- Love your veg – many benefits were already driving growth in this trend area, but now veg is also linked to hygiene. Meat alternatives are shifting to shorter, more natural ingredients list

Note – This presentation was given as part of the Welsh Government's Insight Conference 2021. A recording of this presentation is available on the Food & Drink Wales Members Area, as well as the 2021/2022 Food & Drink trends infographic.

Links to other relevant reports:

Kantar Report: 2021 The Latest Retail Performance and Trends

Kantar Report: 2021 Our Nation Out of Home

Kantar Report: 2021 Grocery Retail Performance

businesswales.gov.wales/foodanddrink

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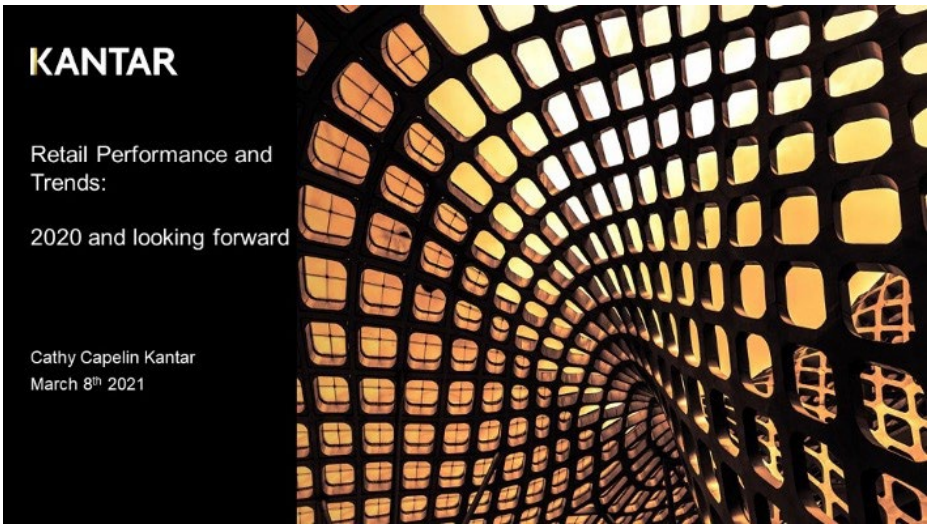
KANTAR REPORT: 2021

The Latest Retail Performance and Trends

An overview of the retail trends in the past year, including the impact of COVID-19 on category performance and shopper habits.



Key Points of Interest:

- Take home grocery performance – a record year
- Out of Home suffers big losses, which means that Food and Drink overall shrinks despite good Take Home performance
- Which categories have seen growth?
- 10 key trends which have altered consumer behaviour
- The fastest growing categories have changed – category performance breakdown
- Headline analysis on Food and Drink performance and trends in Wales
- The growth of online – but still only £1 of every £9 is spent online
- Retailer performance breakdown chart
- Information on upcoming Government policy on health and high fat salt and sugar (HFSS) restrictions in 2022
- Mapping the financial pressure of COVID-19 on shoppers – some consumers will have pent up demand while others will be cautionary and considered shoppers
- Conclusions and upcoming challenges

Note – This presentation was given as part of the Welsh Government's Insight Conference 2021. A recording of this presentation is available on the Food & Drink Wales Members Area.

Links to other relevant reports:

Kantar Report: The Shopper of the Future (2020)

Kantar Report: Grocery Retail Performance (2021)

Insight Programme Report: Value of Welshness (2020)

Trade Development Programme Presentation: 2021 Trading in Retail and Performing Better

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TRADE DEVELOPMENT PROGRAMME PRESENTATION

2021 Trading in Retail and Performing Better

Best practice and advice to achieve success through trading in retail.

Key Points of Interest:

- What are major retailer buyers looking for?
- How to prepare to pitch to buyers
- Regional and National listings with strong Welsh presence
- How to perform better with major retailers
- The importance of planning short and medium-term objectives and how to achieve them
- What does quality account management look like?
- How to create a joint business plan that meets the objectives of both retailer and supplier
- How to delight with product, packaging and branding
- The importance of engaging with and understanding the consumer
- Identifying opportunities by using insight
- Growing through online
- Summary of key points for success through trading in retail

Note – This presentation was given as part of the Welsh Government's Insight Conference 2021. A recording of this presentation is available on the Food & Drink Wales Members Area.

Links to other relevant reports:

Kantar Report: 2021 Grocery Retail Performance

Kantar Report: 2021 The Latest Retail Performance and Trends

Insight Programme Presentation: 2020 Value of Welshness

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DYLAN'S PRESENTATION: 2021

Pivoting in the Pandemic

A case study of the diversification of Dylan's restaurant during 2020, and longer-term changes to the business

Key Points of Interest:

- Immediate financial impact of the first lockdown in 2020
- Supporting community through quick collaboration with other businesses to send hot meals to local hospitals.
- Formed a group called Neges with collaborators to provide food and support to those struggling
- Quick mobilization and distribution infrastructure set up - 30,000 meals delivered to hospitals over 2 months
- Business diversification: May 2020 set up a bakery with fresh bread and converted bars in restaurants into fresh produce markets.
- Re-opened restaurants for local takeaway and home delivery. Created a new menu which was suited to delivery
- Summer 2020 allowed for re-opening outdoors. Upgraded outdoor spaces with seating, heating and covers
- Ready to bake pizza range launched – opened accounts with other retailers and eventually were making 1000 per week. Have just secured an account with Co-op
- Lockdown 2.0 – soup range launched using same recipe as used in restaurant, branded packaging
- Savoury pies, pastries and deserts baked for the fresh produce market shop. Supported other Welsh brands by stocking them in the shop
- Signed a lease for the first Dylan's baked goods and general store, aiming to open more
- New ready meal range – converted best selling dishes on menu to a ready-made range with branded packaging
- Support from Food Tech center in Llangefni – food new product testing and consultancy. Funding from Smart Cymru and others to help upgrade prep kitchens

Note – This presentation was given as part of the Welsh Government's Insight Conference 2021. A recording of this presentation is available on the Food & Drink Wales Members Area.

Links to other relevant reports:

Kantar Report: 2021 Our Nation Out of Home

Kantar Report: 2020 The Shopper of the Future

The Food People: 2021-2022 Top Ten Food and Drink Trends

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DRINKS CLUSTER PRESENTATION: 2021

Using Insight in the On-Trade to Trade Better

A presentation outlining the importance of insight for successful Welsh on-trade performance in the Drinks Cluster- case study used to illustrate this

Key Points of Interest:

- Aim of the project was to increase availability of Welsh beers throughout hospitality venues in Wales
- Information on the value and growth of UK beverage industry
- Overview of the number of breweries in Wales and where they are located
- Analysis of the performance of Welsh alcohol in the on-trade market
- The barriers to increasing sales to Welsh on-trade
- Analysis of Welsh beer/cider availability in the off-trade vs on-trade
- Breakdown of English vs Welsh brands available in Welsh pubs
- Areas of potential growth identified

Note – This presentation was given as part of the Welsh Government's Insight Conference 2021. A recording of this presentation is available on the Food & Drink Wales Members Area

Links to other relevant reports:

CGA Report: 2021 On-Trade Drinks Performance and Trends

Kantar Report: 2021 Out of Home Review

businesswales.gov.wales/foodanddrink

BIC INNOVATION PRESENTATION

Getting into Export and New Markets in Export

A step-by-step guide to the key foundations of setting up successful export relationships. Includes a case study with 9Brand

Key Points of Interest:

- Tips for identifying your market and customer
- How to find markets and partners
- Ensuring that you understand your target customers in a market
- How to map out your route to market
- Considering price in your target export markets – example product pricing structure and costs
- Outlining your criteria for customer and partner relationships
- Identifying potential partners through screening questions
- How to develop successful relationships with customers – share vision for the future, ensure smooth market management and recognize the success of your partner

Note – This presentation was given as part of the Welsh Government's Insight Conference 2021. A recording of this presentation is available on the Food & Drink Wales Members Area

Links to other relevant reports:

Euromonitor Presentation: 2021 Markets that will renew quicker and emerging GB categories that could be ripe for export

businesswales.gov.wales/foodanddrink

FOOD INNOVATION WALES PRESENTATION: 2021

Taking Insight into New Products

Illustrating how Food Innovation Wales can support NPD creation and business innovation and includes case studies with three businesses: VIT protein, Joe's Ice Cream and the Pudding Compartment

Key Points of Interest:

- The structure and mission of Food Innovation Wales
- An overview of the facilities that Food Innovation Wales has on offer including laboratory facilities, colour and texture assessment as well as sensory evaluation booths
- Project Helix Case Study – aims to help micro and SME businesses with food innovation, efficiency, and strategy
- Food Innovation support covers NPD, product reformulation, technical information, new business start up, food legislation, added value propositions
- Food Strategy support covers: mentoring, public engagement, 3rd party accreditation, food business development
- Food Efficiency support covers: packaging, site design, product efficiency, process controls, validation of systems, system development, process controls
- Knowledge is shared by various resources: conferences, affiliates, technologists, mentorship, seminars, CPD
- Project Helix has supported the creation of 1000 new products for 200 start ups and 400 food and drink businesses
- An overview of the NPD process from research to launch
- A taster of the events, workshops and information available to businesses
- Summary of the Cadwyn Clwyd Programme – insight data to create new concept products
- Examples of Welsh food and drink businesses who have benefitted from support
- Key contacts and helplines available to Welsh food and drink businesses

Links to other relevant reports:

Dylan's Presentation: 2021 Pivoting in the Pandemic

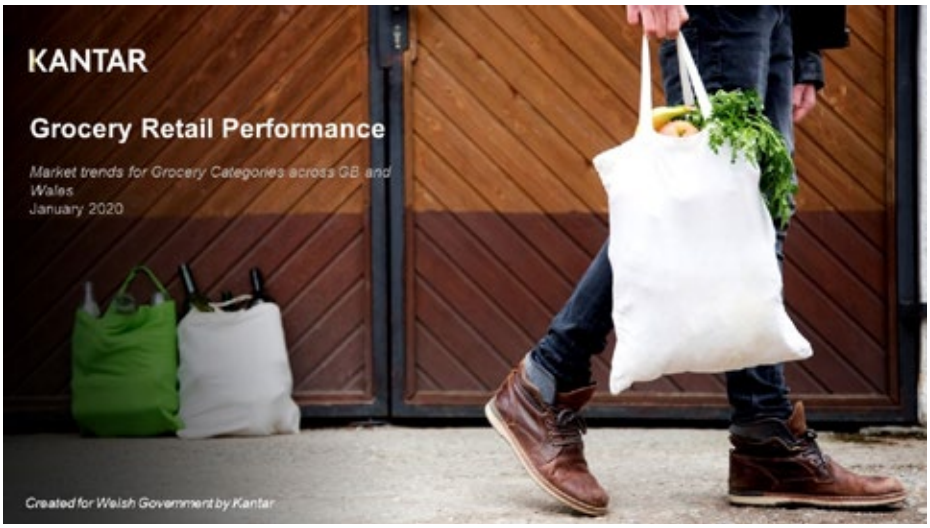
Trade Development Programme Presentation: 2021 Trading in Retail and Performing Better

businesswales.gov.wales/foodanddrink

KANTAR REPORT

2020 Grocery Retail Performance

An overview of the total market in GB and Wales and across key subsectors in 2019.



Key Points of Interest:

- Total Grocery
- Total Meat and Meat Products
- Total Dairy and Dairy Products
- Total Bakery
- Total Beverages
- Total Fish and Seafood
- Total Cereal, Grains and Pulses
- Total Fruit and Vegetables
- Total Oils and Fats
- Animal Food

Each of the above sub sectors are broken down into the following analysis:

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- GB and Welsh Retailer performance
- GB and Welsh shopper profile overview

Links to other relevant reports:

Kantar Report Grocery Retail Performance, 2019

Kantar Report Grocery Retail Performance, 2018

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KANTAR REPORT 2020

The Shopper of the Future

Report detailing the key forces of change that will shape and frame the consumer landscape in Wales over the next 3-5 years.

Key Points of Interest:

- Identifies 9 key drivers of change which will shape the consumer landscape over the next 5 years
- Bespoke research commissioned by Welsh Government Food Division to support future strategy
- Macro drivers of change condensed into 6 key consumer trends that will define the landscape consumers will live in and which will shape their choices in food and drink
- Includes the impact of COVID-19 in terms of long-term hangovers and behaviour changes and those which might be short term
- Implications of these trends for 'Welsh in Wales' and 'Wales in the World'
- Detailed breakdown of the 6 key consumer trends which are:
  - Fluid Lives
  - Sustainable Responsibility
  - Digital Expansion
  - Elevated Experiences
  - Trust and Identity
  - Living Well
- Convenience is key, as well as making an impact in the new retail channels
- Importance of considering your whole supply chain and the efficiency of resource use
- Importance of utilising the perception of Wales as 'natural'
- Maximising the usage of data and technology to reach consumers and to provide the best product and service to customers
- Importance of providing memorable experiences through your product
- Tapping into the 'healthy mindset' of consumers
- Overview of how 'Welshness' can aid performance in these 6 key consumer trend areas

Links to other relevant reports:

Kantar Report: Sustainability Report - Who Cares, Who Does (2020)

Kantar Report: Out of Home (2020)

Insight Programme Report: Value of Welshness (2020)

Kantar Report: Consumer Usage (2019)

businesswales.gov.wales/foodanddrink

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KANTAR REPORT: 2020 SUSTAINABILITY REPORT

Who Cares Who Does Sustainability

An in-depth review of research into the environmental attitudes and actions of consumers around the world including GB and Wales. It also describes different consumer groups based on how concerned they are about the environment and the actions they take around sustainability.

Key Points of Interest:

- Consumer perspective on the ranking of environmental concerns
- Detail about differing levels of plastic waste concern across countries
- What actions are consumers making to reduce plastic waste – the harder the action to do, the less people do it
- How concerns about product packaging measure up against other shopper concerns such as whether the product is low sugar, local etc
- Are consumers willing to pay more for environmentally friendly packaging?
- Identifying Eco-Active shoppers (who are partially engaged or regularly active) through shopper segmentation profiling
- More than 50% of consumers are environmentally engaged and taking some small actions, but very few are regularly active
- What are the actions that consumers are taking?
- Plastic waste is not a universal concern
- Eco-Actives' consumer profile – age, social class and household size
- The Halo effect where 'Natural' and 'Organic' products are assumed to be linked to environmental action
- GB and Wales detailed breakdown of eco-active and eco-dismisser consumers and their concerns and what they look out for when buying products
- Where eco-active consumers shop by retailer

Links to other relevant reports:

Kantar Report: 2020 Protein and Plant-based; Purchase and Consumer Perspectives

Kantar Report: Understanding the growth of vegetarianism and meat avoidance (2017)

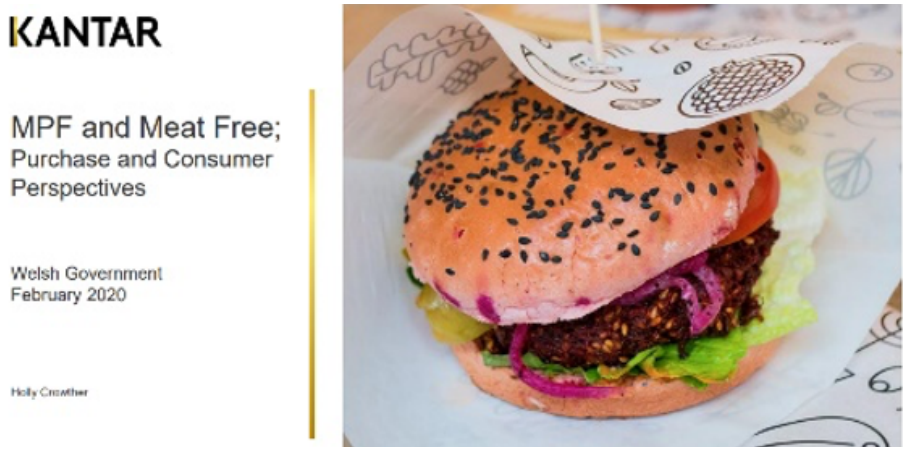
Kantar Report: 2020 Grocery Retail Performance

businesswales.gov.wales/foodanddrink

KANTAR REPORT

2020 Protein and Plant-based; Purchase and Consumer Perspectives

This report contains valuable information about the sizing of the vegetarian, flexitarian, and meat reducer market. It also provides in-depth detail about the meat market as well as unpacking consumer behaviour towards meat consumption split by consumer groups and occasion type.



Key Points of Interest:

The following information is included for Total Meat and Total Fish and Seafood categories

- Total Market Overview
- Wales and GB Meat market comparisons
- Retailer performance in the meat market
- Detailed split by category within the meat market showing growth and decline
- GB and Wales shopper profile comparison
- Organic within Fresh Meat, Fish and Poultry Overview
- Free Range within Fresh Poultry Overview
- Meat Free Overview
- Branded in MFP and Meat Free Overview
- Interaction between MFP and Meat Overview
- The significance of meat switching (e.g. switching from Pork to Chicken)
- Detailed breakdown about the growth of vegetarianism and meat avoidance
- Introduction of new consumer groups adapted to show vegetarianism / meat avoidance
- Clear statistics about the number of vegetarians, meat reducers and flexitarians in the UK population
- Understanding meat free occasions – the size of the meat free occasion, meat substitute growth, fish consumption
- Where eco-active consumers shop by retailer

Links to other relevant reports:

Kantar Report: Sustainability Report – Who Cares, Who Does (2020)

Kantar Report: The Free-From Market in Great Britain and Wales (2019)

Kantar Report: Understanding the growth of vegetarianism and meat avoidance (2017)

businesswales.gov.wales/foodanddrink

KANTAR REPORT

Total Cheese Review – Comparing Wales to the GB Market

This report takes a detailed deep dive into the current cheese market and trends within it for GB and Wales.

Key Points of Interest:

- Covid-19 slides which include:
  - Growth and frequency in March
  - Total Cheese growth in 12 weeks lock down – which could result in 3 outcome scenarios for the remainder of 2020
  - Category growth by consumer group, regionality, sector, retailer, product size
- Wales vs GB Cheese Detailed Market Overview
- Retailer Performance (Wales and GB) including information about Lidl, Aldi, Co-op
- Cheese Sectors and Types breakdown
- Plain Label and Brands Performance
- Product NPD performance overview
- Blocks and Cheddar Blocks performance in Wales and GB

Links to other relevant reports:

The Insight Programme Bite-sized summary: Cheese Analysis (2019)

businesswales.gov.wales/foodanddrink

KANTAR REPORT

2020 Out of Home Kantar Review

An evaluation of the trends of consumer OOH spending in Great Britain compared with Wales in 2019.

KANTAR

Kantar Out of Home
Our Nation

2019

Catriona Stewart
18th March 2020

Key Points of Interest:

- **OOH Market** sees growth – but the growth is competitive due to the market splits
- Wales vs GB OOH spend and trips overview
- OOH consumer behaviour in Wales (Spend, number of trips, items per trip, spend per item)
- Wales OOH spend by age group and economic group
- Analysing where Welsh OOH consumers spend (Pubs and bars, full service restaurant) vs GB
- The top 5 OOH retailers for Wales and GB
- Wales vs GB performance in OOH sectors
- Wales vs GB performance in OOH occasion
- Total channel share of OOH – highly competitive
- UK Consumer confidence and budgeting has had an impact on high street footfall
- Recessionary Behaviours – OOH is at most risk from people cutting back on spending
- Trading up and down patterns OOH
- Shopper switching behaviours and value lots from different channels
- Delivery trips vs OOH trips
- **OOH meal occasion analysis**
- Breakfast - deep dive into breakfast occasion consumer spending
- Snacking occasion deep dive – Wales vs total market data, ice cream as a pocket of growth
- **Conscious Consumer**
- Consumers becoming increasingly conscious: moderating alcohol consumption and the growing low/ no alcohol market, meat-free meals, plastic avoidance
- Retailer and brand actions in a similar 'conscious' vein
- Health OOH – where is the growth coming from? (occasion, age group, meat reducer behaviour)
- Reusable cups and waste reduction behaviour overview
- Summary points

Links to other relevant reports:

Kantar Report: Sustainability Report – Who Cares, Who Does (2020)

Kantar Report: 2018 The Free-From Market in GB and Wales

Kantar Report: 2019 Consumer Usage Kantar Review

businesswales.gov.wales/foodanddrink

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THE INSIGHT PROGRAMME REPORT: 2020

Value of Welshness

Consumer research on attitudes towards Welshness in relation to Welsh food & drink.

Key Points of Interest:

- Key aim: ascertain what GB consumers think of Welsh food and drink products in order to capitalise on this
- Would Welsh shoppers prefer to buy Welsh products?
- What are the sustainable brand values (SBVs) / consumer pulls to Welsh products? This information is split by category
- Will consumers pay more for key product aspects such as recyclability, animal welfare, healthy…
- English shopper perceptions of Welshness
- Welsh landscape, core associations with Wales
- How Welsh brand cues influence shopper perceptions
- How effective is the Welsh flag and 'official dragon' in signifying Welshness on pack?
- The best practices for using Welsh language on products
- How should Welsh specific locality be used in brands to appeal to English shoppers?
- How to build a brand on Welshness with layers of emotional levers
- The way that Welshness is displayed on products reflects their positioning
- Using language and wording to convey Welsh credentials
- Which phrases highlighting product 'Welshness' are the most appealing to shoppers
- Mid-priced and premium tier Welsh products examples of using 'Welshness' as a product pull
- Welshness is a motivator for Welsh and English shoppers
- Breakdown detailing how Welshness adds value to products
- How do shoppers think Welsh retailers support Welsh products?
- Which retailers have the biggest shares in Wales, and what is the consumer perception of which retailers sell the most Welsh products?
- The power of in-store signage to make Welsh visible and to be disruptive to shopper journeys
- How COVID-19 has impacted shopper attitudes
- Executive summary slide at the end of presentation

Links to other relevant reports:

Kantar Report: Grocery Retail Performance (2020)

Kantar Report: The Shopper of the Future (2020)

Kantar Report: Sustainability Report - Who Cares, Who Does (2020)

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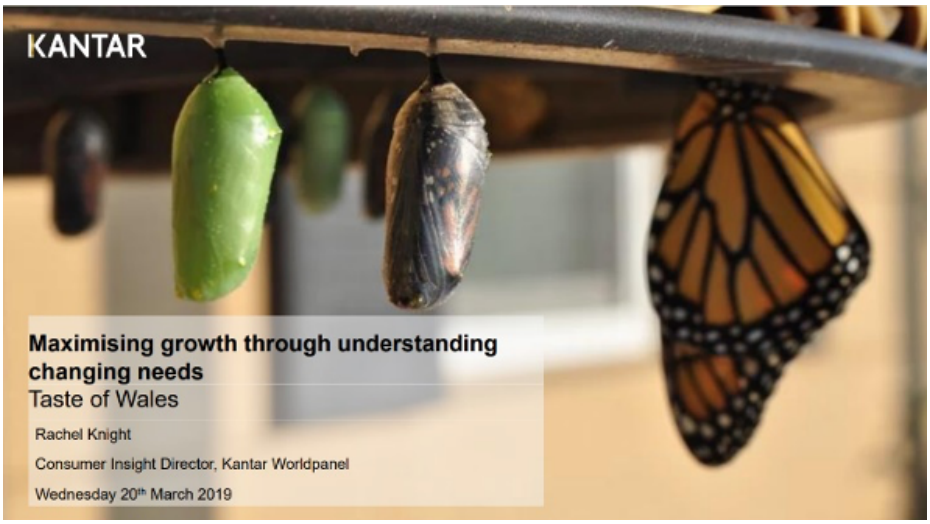
KANTAR REPORT: 2019

Consumer Usage

Also named as 'Maximising Growth Through Understanding Changing Needs'. This report was presented at Taste Wales in 2019 and investigates consumer food habits



Key Points of Interest:

- How consumption patterns change with age
- Cannot simplify millennials through age-grouping, need to look at lifestyles
- Which stereotypes are true about millennials? Interesting findings regarding healthy and ethical choices
- The importance of enjoying food and drink overrides all other reasons to consume. Consumers seek out food for enjoyment particularly at the weekend
- Top 10 meals
- The importance of health to the consumer
- Analysing take home shopping baskets and increase in health-conscious buying
- Timeline of government health guidelines policy
- Life stage and income have a clear impact on shopping baskets and how healthy they are
- Times and occasions when health is not front of mind
- The healthiest food and drinks
- Free from NPDs
- Vegans only account for a small percentage of the plant based meals bought per year, flexitarians drive plant based growth
- A detailed analysis of breakfast consumer habits
- Possible Brexit Implications on consumer usage
- Pre-recessionary behaviour analysis (including snacking, OOH, own label, staple foods)

Links to other relevant reports:

2018 The Importance of Health to the GB Consumer Kantar Review

2018 The Free-From Market in Great Britain and Wales

2020 Who Cares, Who Does Sustainability Report

2019 Out of Home Kantar Review

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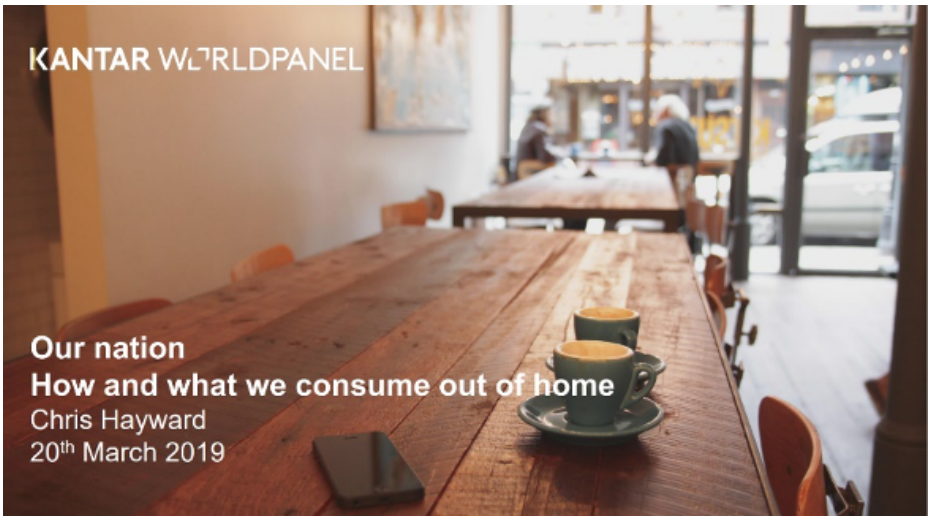
KANTAR REPORT: 2019

Out of Home Kantar Review

An evaluation of the trends of consumer OOH spending in Great Britain compared with Wales



Key Points of Interest:

- OOH market headlines – market is in growth for all major channels
- Wales OOH major channels performance
- Retailer investment in OOH
- Examples of immersive experiences
- Restaurant menus evolving – health, value and vegetarian options as key drivers for change
- Technology impact on meals at home and consumer restaurant behaviour
- Value decisions for consumers – takeaway is more robust that FSR
- Spending habits changing as consumers trade up and down
- OOH vouchers and changing YOY growth by OOH occasions
- YOY change in OOH occasion consumption for Wales
- 3 key need states and how they differ between Wales and GB
- Need states by occasion
- OOH share of value by category: Hot Beverages, Soft Drinks, Ice Cream, Cakes & Biscuits, Confectionary, Crisps & snacks
- Fastest growing OOH categories (Ice Cream and Yoghurt show impressive growth)
- OOH spend per occasion vs In Home
- 2019 shows a return to recessionary behaviours – these are summarised

Links to other relevant reports:

2020 Out of Home Kantar Review

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KANTAR REPORT: 2019

Winning in Retail Kantar Review

Data on the performance of food and drink in the retail sector

Key Points of Interest:

- Retailer Performance trends and growth (12 week till roll data February 2019)
- Aldi and Lidl market share growth
- Switching movement to discounters and online
- 4 key factors for retail market 2019: Inflation, Promotions, Expansion, Responsibility
- Retailer share Wales vs England & Scotland – which retailers are relatively more important for Welsh shoppers
- Welsh shopper spending and frequency profile
- The importance of innovation for retailers
- Three categories with the highest level of innovation
- Top 10 NPDs by sales
- Premiumisation, clear target or an unmet need are the key drivers for NPD success
- Summary of changing behaviours prior to Brexit

Links to other relevant reports:

2019 Craveable Health by Thefoodpeople

2019 Consumer Usage Kantar Review

2019 Grocery Retail Performance

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THEFOODPEOPLE REPORT: 2019

Craveable Health

A visual presentation covering consumer interest in health, innovative NPDs and the importance of brand storytelling.

Key Points of Interest:

- Key drivers of consumer interest in health
- Innovative health NPDs
- Community Spirit – examples of companies e.g. Toast Ale UK, Loop
- The importance of a compelling story for your brand which can be told visually through the product and social media. Examples of brands and products which achieve this.

Links to other relevant reports:

2018 The Importance of Health to the GB Consumer Kantar Review

2017 Understanding the growth of vegetarianism and meat avoidance

2018 The Free-From Market in Great Britain and Wales

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THE INSIGHT PROGRAMME: 2019

Bite-sized report: Cocktails

An overview of cocktail consumer profiles in the UK profile and the trends in the industr.

Key Points of Interest:

- UK Value and Volume of the Spirits sector
- Consumer Demographics (Spirits) – gender, age group and education level splits
- Industry Trends – increasing cocktail popularity driving spirits growth
- Survey showing that a fifth of drinkers are now opting for cocktails over beer and wine.

Links to other relevant reports:

Kantar Report: 2019 Grocery Retail Performance

Kantar Report 2020 Grocery Retail Performance

Kantar Report 2018 Our Nation Out of Home – Wales

businesswales.gov.wales/foodanddrink

BROOKDALE BITE-SIZED REPORT USING KANTAR DATA : 2019

Kids meals

This report uses category data to provide an insight overview on kids' meals. This includes baby food, toddler meals and older children's' ready meals

Key Points of Interest:

- Information about which products sit within the category and segmentation
- Overall market values and forecasts including household penetration, frequency and spend
- Trends in family meal habits and health conscious parents
- Competitor analysis – NPD launches, Ella's Kitchen, brand price positioning
- Includes information about frozen ready meals

Links to other relevant reports:

Kantar Report: 2019 Grocery Retail Performance

Kantar Report 2020 Grocery Retail Performance

Kantar Report 2018 Our Nation Out of Home – Wales

businesswales.gov.wales/foodanddrink

THE INSIGHT PROGRAMME BITE-SIZED REPORT: 2019

Switzerland Export Market Analysis

This report investigates which markets the WG should be visiting in 2020/21 under the Trade Development Visit programme, with a particular focus on Switzerland as a potential market.

Key Points of Interest:

- Overview of Switzerland's attributes as a trading partner
- Predictions for growth in demand within the beverages sector in Switzerland
- Profile of food and drink production and imports in Switzerland
- Swiss Agricultural Industry Facts
- Key export markets for Wales identified using previous research
- Indonesia and meat imports
- Trends in Global Meat Sector and high-potential countries
- Trends in Global Dairy & Soy Food Sector and high-potential countries
- Trends in Global Bakery and Cereals Sector and high-potential countries
- Trends in Global Prepared Meals Sector and high-potential countries

Links to other relevant reports:

Kantar Report 2020 Grocery Retail Performance

businesswales.gov.wales/foodanddrink

THE INSIGHT PROGRAMME BITE-SIZED REPORT: 2019

Cheese Analysis

A brief summary of the cheese market, specifically focusing on foodservice in the UK and export markets. .

Key Points of Interest:

- Foodservice volumes
- UK Value and Volume – distribution, penetration, frequency and spend per buyer
- Overview of own label and branded as well as territorial cheese value
- Global Value and Volume
- UK Exports, key export markets and growing markets
- Industry issues – negative trade balances, imports, cheddar progress, Brexit
- Trends summary looking at plant-based, full-fat products, organic, locality and product transparency

Links to other relevant reports:

Total Cheese Review – Comparing Wales to the GB market, 2020

The Cheese Market in Great Britain and Wales, 2019

businesswales.gov.wales/foodanddrink

KANTAR REPORT 2018

Food and Drink Update – Total GB and Wales

Kantar analysis of grocery update - GB vs Wales 2018. .

Key Points of Interest:

- Information about the average price paid per item across retailers
- Asda and Sainsbury's aborted merger analysis including geographical strengths of each retailer
- Food and Drink growth analysis
- Wales Food and Drink market headlines vs GB
- Welsh shopper trends
- Premium retailers and the potential opportunity Wales provides
- Top Consumer Trends
- Growing health concerns
- Emerging Free-from
- Sugar reduction analysis
- Retailer share and growth
- Aldi and Lidl growth analysis
- Online grocery and e-commerce global picture statistics
- Branded vs own label breakdown
- Out of Home Overview
- A return to 'recessionary' eating habits'

Links to other relevant reports:

Our Nation Out of Home, 2018

2019 Grocery Retail Performance

Kantar Report 2018 The Free-From Market in GB & Wales

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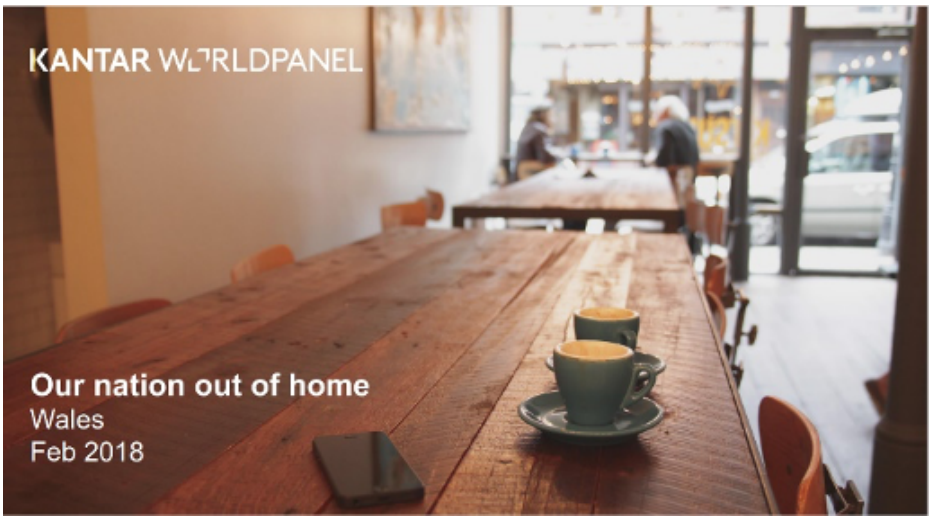
KANTAR REPORT 2018

Our Nation Out of Home, Wales

This is a statistical evaluation by Kantar of the trends of people's spending in Great Britain compared with Wales



Key Points of Interest:

- GB Out of home (OOH) fundamentals – sizing, worth, population penetration, frequency
- Welsh vs GB
- Wales OOH outperforming rest of GB, growth is driven by frequency
- Analysis of categories which are performing well and breakdown into smaller categories (GB and Wales)
- Analysis of foodservice channels which are performing well (GB and Wales)
- Inter-channel competition
- Summary of consumer groups OOH spending trends GB and Wales
- OOH Market Trends – are consumers more considered with their purchase decisions?
- Market growth and decline trends
- Markets are split into total hot drinks, total cold drinks, total savoury snacks, total sweet snacks, total quick meals, formal meals
- OOH Cuisine popularity shown
- Evening meal occasion breakdown
- What is driving growth?
- Spend in pubs/bars split by meal type and occasion
- How to win in OOH: diversify and targeting the occasion
- How to succeed in OOH Hot Drinks
- How OOH plays into popular consumer need states

Links to other relevant reports:

Kantar Report 2017 Our Nation Out of Home – Wales

Kantar Report 2018 Grocery Retail Performance

Kantar Report: 2019 Grocery Retail Performance

Kantar Report 2018 Food and Drink Update – Total GB and Wales

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KANTAR REPORT 2018

The Cheese Market in Great Britain and Wales

An in-depth look into the cheese market in Great Britain and Wales. Cheese is broken down into seven different categories; cheddar, continental, processed, mini portions, territorials, blue and soft white.

Key Points of Interest:

- Research based on Kantar's take-home purchases for 30,000 households
- Cheese split into categories through a 'market hierarchy' – 7 categories and 7 sub-categories
- Detailed insight for: Brie, Goats Cheese, Stilton, Feta, Mozzarella, Edam, Gouda, Camembert, Halloumi, Gruyere
- Summary of trends within cheese
- Market Performance – split into GB and Wales, including private label and retailer performance
- Welsh Origin Cheese breakdown
- Sub sectors (split into branded and private label)
- Types of Cuts and Promotions
- Overall Cheese market detailed information (spend, penetration, frequency vol per trip) for GB and Wales
- Retailer Spend Share
- Overview of the KPIs driving growth per subtype
- Promotional Spend summary

Links to other relevant reports:

Cheese Analysis, 2019

Total Cheese Review – Comparing Wales to the GB market, 2020

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KANTAR REPORT 2018

The Free-From Market in GB and Wales

An in-depth look into the cheese market in Great Britain and Wales. Cheese is broken down into An examination of the trends in free-from products in Great Britain and Wales. Analysis of the trends in allergies and how it effects purchases and trends in free-from products.

Key Points of Interest:

- Report includes data from Kantar's take home purchases for 30,000 households (retailer, spend, shop address, price details, promotions, product information)
- Overview of Free-From Summary
- Household conditions – shows which intolerances and allergies are most and least prominent in shoppers
- Free-From Share of Market (GB and Wales)
- Free-From Market Overview: shares, NPDs, brands, by retailer, awareness of the market and growth, Wales within the overall picture
- Free-From Market Headroom -size of the opportunity for Wales, which categories could provide an opportunity for Wales

Links to other relevant reports:

Kantar Report: Healthy Desserts Great Britain (2018)

Kantar Report 2018 Food and Drink Update – Total GB and Wales

Kantar Report 2018 Grocery Retail Performance

Kantar Report: 2019 Grocery Retail Performance

Kantar Report 2020 Protein and Plant-based: Purchase and Consumer Perspectives

businesswales.gov.wales/foodanddrink

KANTAR REPORT 2018

Healthy Desserts

An analysis of the healthy dessert industry in Great Britain. The healthy desserts are divided into three main categories: yogurts, chilled desserts, and healthy ice cream.

Key Points of Interest:

- Trends summary
- Yoghurts – detailed overview, spend increase by type, volume changes, private vs branded, where the opportunity lies
- Chilled Desserts - detailed overview, spend increase by type, volume changes, private vs branded, where the opportunity lies
- Ice Cream - detailed overview, spend increase by type, volume changes, private vs branded, where the opportunity lies

Links to other relevant reports:

Kantar Report 2018 The Free-From Market in GB & Wales. 2018

Kantar Report 2018 Grocery Retail Performance

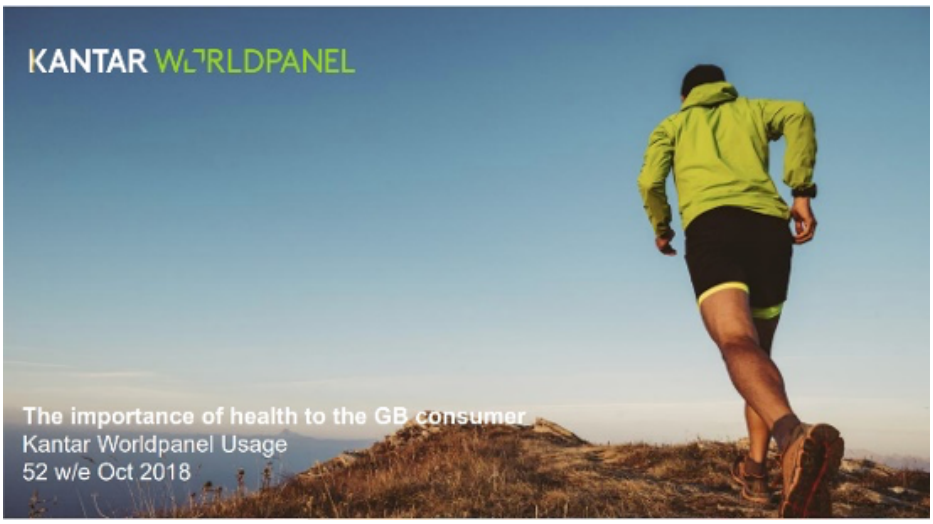
Kantar Report: 2019 Grocery Retail Performance

businesswales.gov.wales/foodanddrink

KANTAR REPORT 2018

Importance of Health to the GB Consumer

This report by Kantar shows in detail the trends in the growing health food market. There is an interesting analysis around the meat reducer consumer and the different elements of health foods.



Key Points of Interest:

- Health market headlines - which elements of health are growing, changing priorities dependent on consumer age and health meal occasions
- Growing areas of health – zero alcohol products, meat avoiders, alcohol reducers
- Long term health trends
- Breaking down the meaning of health (natural, low in sugar, fewer calories)
- Which categories speak to different health needs
- The price premium attached the health products
- Health needs for drinks and how they are growing
- Examples of health-oriented NPDs across a range of categories
- 'Meat avoidance' vs non meat reducer behaviours – shows how the population is split
- Flexitarians behind the move towards 'meat avoidance'
- Meat reduction impacting the number of occasions with meat or fish – shows long-term trends
- The growth of plant based savoury meals since 2016
- Mapping changes in health-conscious trends depending on age and gender
- Analysing differences in health-conscious food in the home versus OOH
- Mapping food health behaviours at different occasions during the day

Links to other relevant reports:

Kantar Report 2019 Consumer Usage Kantar Review

Kantar Report 2017 Understanding the growth of vegetarianism and meat avoidance

Kantar Report 2020 Protein and Plant-based: Purchase and Consumer Perspectives

Kantar Report 2018 Healthy Desserts Great Britain

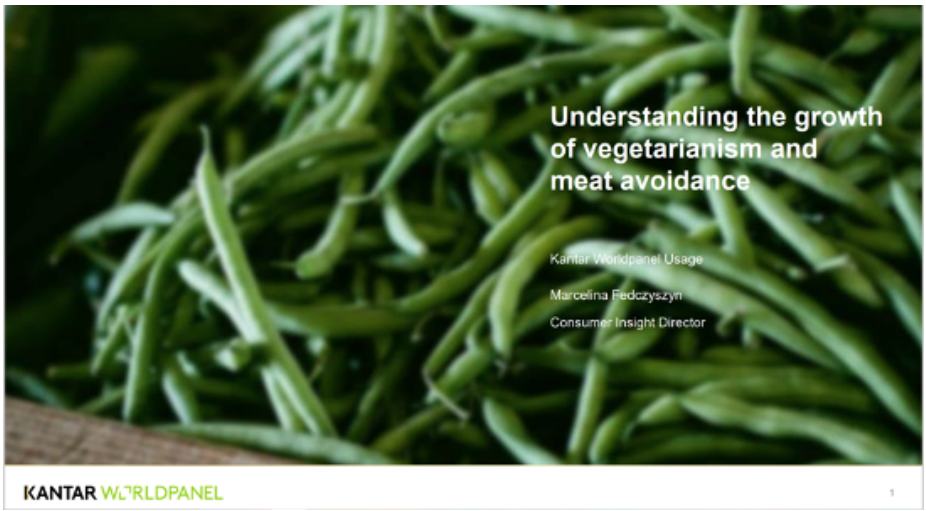
Kantar Report 2018 The Free-From Market in Great Britain and Wales

businesswales.gov.wales/foodanddrink

KANTAR REPORT 2017

Understanding the Growth of Vegetarianism and Meat Avoidance

This report has attempted to quantify the term vegetarianism and meat avoidance. The results are broken down into different categories and are measured using a range of indicators.



Key Points of Interest:

- Defining consumer groups around meat avoidance e.g. meat reducers, flexitarians
- Number of vegetarians, pescatarians, meat reducers, flexitarians in GB (Gender breakdown included)
- Meat reducer number has increased year on year, but non-meat reducers still dominate the population
- Understanding meat free occasions
- Sizing the market – 14.4bn meat occasions and 9.1bn non-meat occasions
- Meat free occasions are slowly gaining share of main meals
- Meat substitute consumer analysis
- Cost of different occasions to consumers
- Perceptions of meal occasion values (health, practicality, enjoyment)

Links to other relevant reports:

Kantar Report 2020 Protein and Plant-based: Purchase and Consumer Perspectives

Kantar Report 2020 Who Cares, Who Does Sustainability Report

businesswales.gov.wales/foodanddrink

KANTAR REPORT 2017

Our Nation Out of Home

Data on consumer purchasing of food and drink when out of home

Key Points of Interest:

- GB Out of home fundamentals – sizing, worth, population penetration, frequency
- Welsh vs GB
- Analysis of categories which are performing well and breakdown into smaller categories (GB and Wales split)
- Analysis of foodservice channels which are performing well (GB and Wales split)
- Summary of consumer groups OOH spending trends GB and Wales
- Channels competing outside of traditional sectors
- Coffee detailed breakdown - a key player driving new occasions and trip spend
- Lunchtime trade breakdown
- OOH overview and occasions and channels which are driving growth

Links to other relevant reports:

Out of Nation out of home – Wales (2018)

Winning in Retail (2017)

Consumer Behaviour (2017)

businesswales.gov.wales/foodanddrink

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KANTAR REPORT 2017

Consumption Behaviour

Winning for Wales and Winning in Wales: A consumption driven perspective

Key Points of Interest:

- GB and Wales eating habits by food type – showing a slightly more traditional consumer in Wales
- Direction of travel from protein and homemade towards ready-made and solution meals
- Meal planning is in decline
- How to inspire the shopper at the POS
- The carried-out market
- The lunchbox market
- Health is mainstream
- Price is always key – but even more important to the Welsh shopper
- Correlation between age and healthy choices
- Average preparation and cooking time for the evening meal has almost halved in a year to 33 minutes – speed and ease is important
- Scratch cooking overview – contrast between GB and Wales
- Welsh consumer profile – how they plan, what is important to them
- Independent eating and single person evening meal analysis
- Health is growing in Wales – breakdown of Health consumer considerations in Wales

Links to other relevant reports:

Winning in Retail (2017)

Grocery Retail Performance (2017)

Food and Drink Update – Total GB and Wales (2018)

Grocery Retail Performance (2019)

businesswales.gov.wales/foodanddrink

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KANTAR REPORT 2017

Winning in Retail

Insight into the performance of food and drink purchases in the retail sector

Key Points of Interest:

- Overall growth including Lidl and Aldi overview
- Overview regarding switching between channels e.g. to online
- The Welsh shopper in context
- Retailer shares across Britain vs Wales
- Economy overview and impact
- Grocery growth and inflation
- Altered consumer behaviour
- Own label vs Brands
- Consumer spend growth by tier, within supermarkets
- Identifies the growing categories within Wales

Links to other relevant reports:

Kantar Report: 2017 Consumption Behaviour, Kantar

Kantar Report 2017 Grocery Retail Performance

Kantar Report 2018 Food and Drink Update – Total GB and Wales (2018)

businesswales.gov.wales/foodanddrink