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# DEFRA Categories' Performance 2019

## Welsh Government

January 2020

Kantar, Worldpanel Division

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# Total Grocery

## 52we 29 December 2019

## Welsh Government

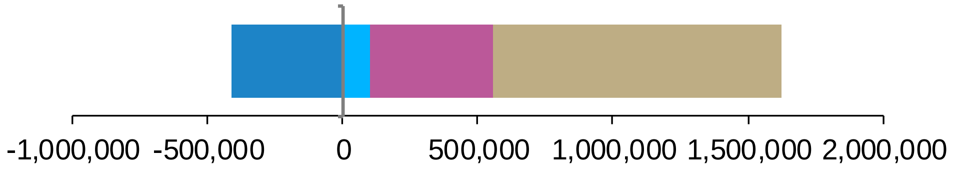
January 2020

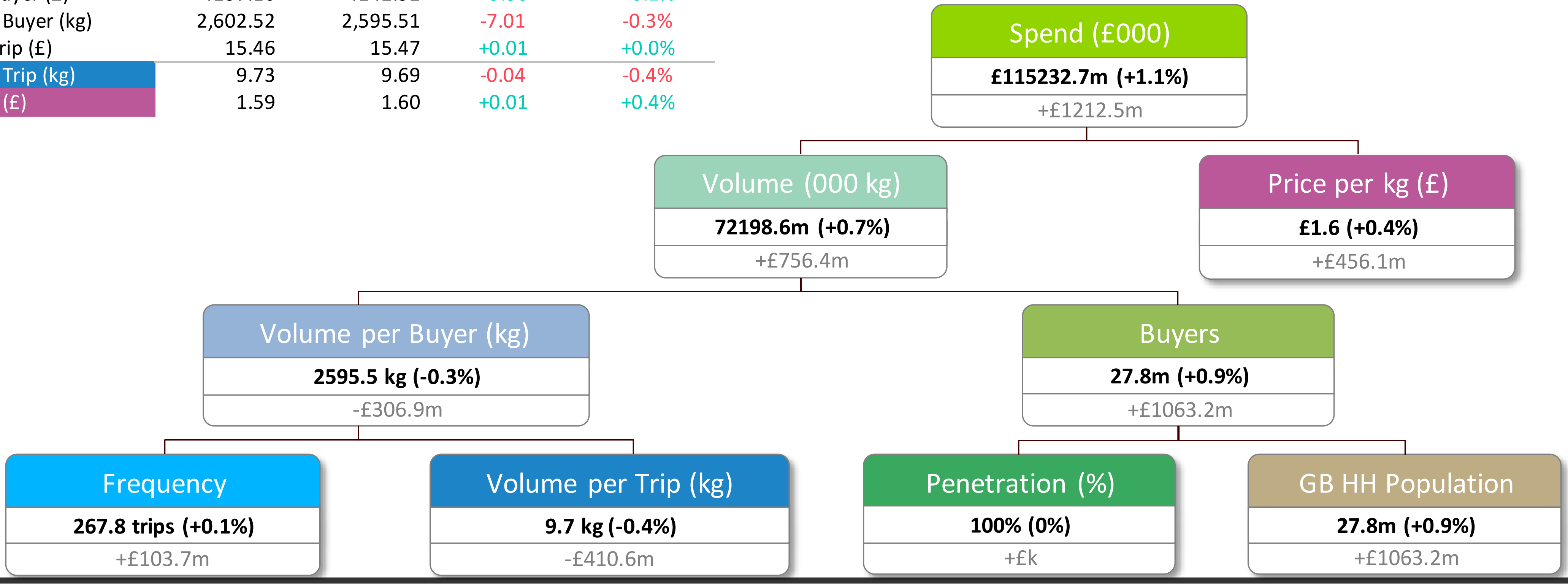
Kantar, Worldpanel Division

# The Total GB Grocery Market saw growth of 1.1%, driven primarily by population growth. Shoppers purchasing less at each trip brings down the volume per buyer over the year.

| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 114,020,200 | 115,232,700 | +1,212,500 | +1.1% |
| Volume (000 kg) | 71,725,010 | 72,198,580 | +473,570 | +0.7% |
| Penetration (%) | 100.00 | 100.00 | +0.00 | +0.0% |
| Frequency | 267.61 | 267.85 | +0.24 | +0.1% |
| Spend per Buyer (£) | 4137.16 | 4142.52 | +5.36 | +0.1% |
| Volume per Buyer (kg) | 2,602.52 | 2,595.51 | -7.01 | -0.3% |
| Spend per Trip (£) | 15.46 | 15.47 | +0.01 | +0.0% |
| Volume per Trip (kg) | 9.73 | 9.69 | -0.04 | -0.4% |
| Price per kg (£) | 1.59 | 1.60 | +0.01 | +0.4% |

**Value up 1.1% worth £1212.5m**

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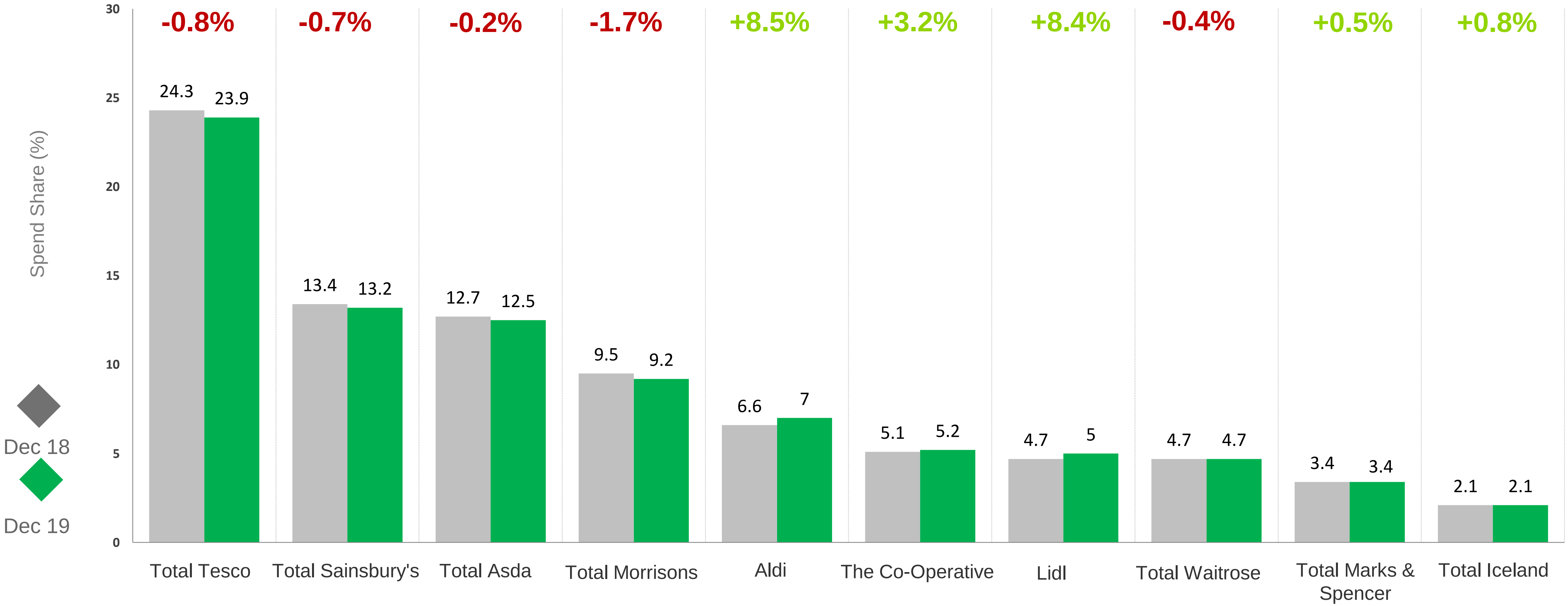
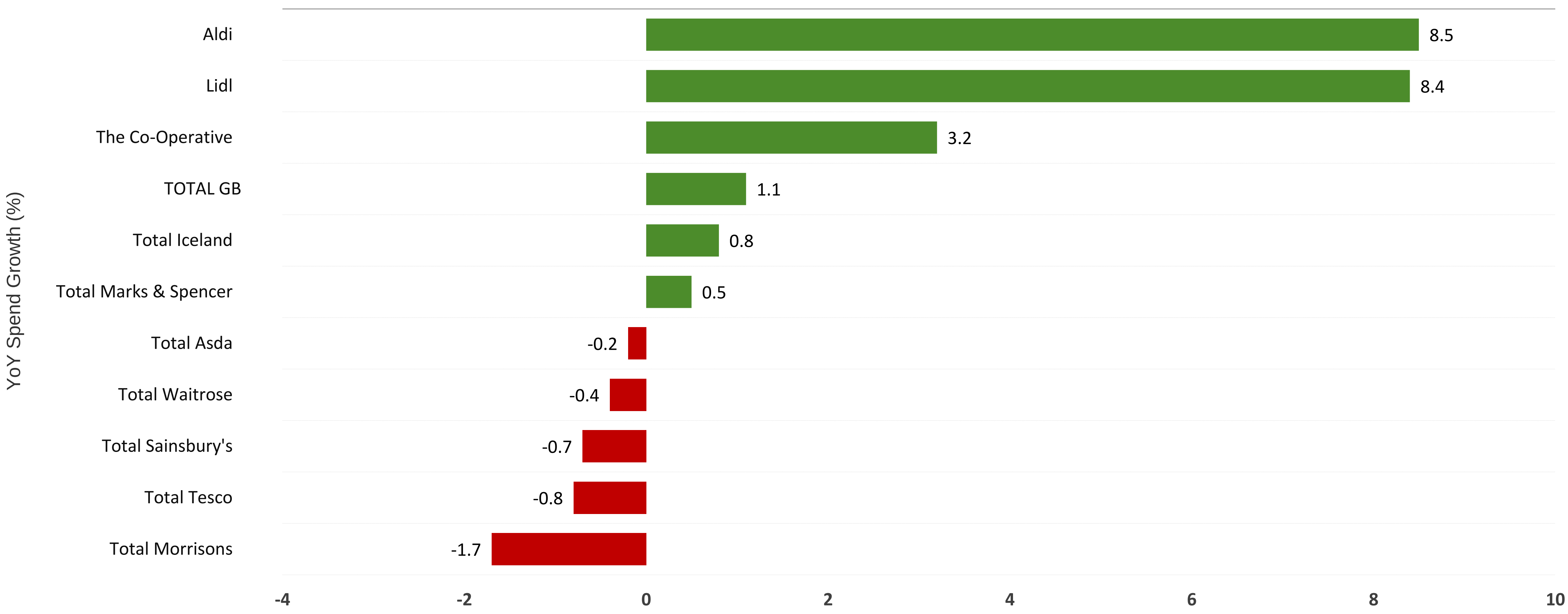
# The discounters are the fastest growing retailers, with Aldi growing slightly ahead of Lidl. The Big 4 and Waitrose are all in decline, with Morrisons seeing the greatest decline.



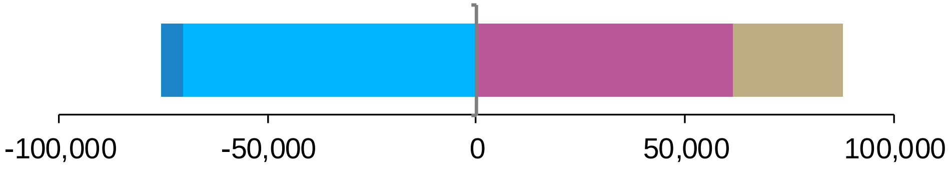
# Aldi and Lidl are driving growth for the grocery market and are the only supermarkets growing ahead GB Grocery average and hence both continue to gain share.



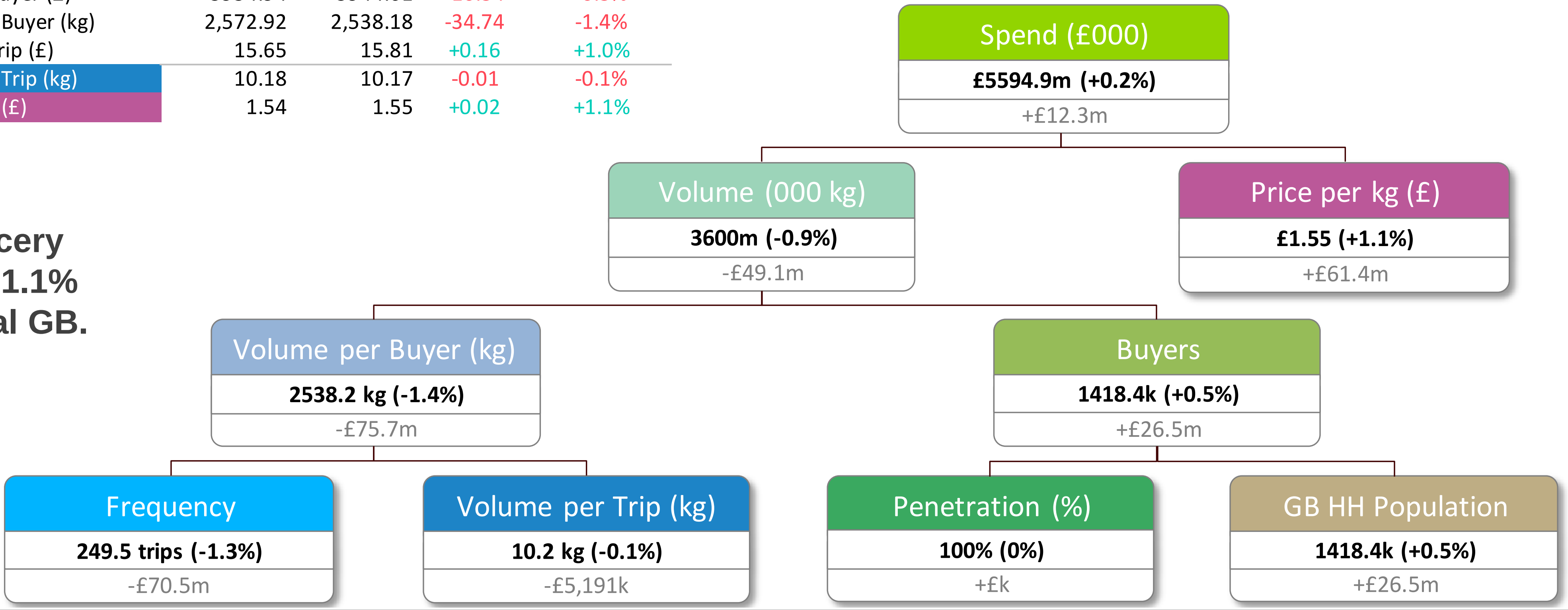
# The Welsh Grocery Market is growing behind the Total GB Market. The market is heavily reliant on price to drive growth, whilst volume measures in decline.

| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 5,582,530 | 5,594,851 | +12,321 | +0.2% |
| Volume (000 kg) | 3,631,764 | 3,600,029 | -31,735 | -0.9% |
| Penetration (%) | 100.00 | 100.00 | +0.00 | +0.0% |
| Frequency | 252.69 | 249.51 | -3.18 | -1.3% |
| Spend per Buyer (£) | 3954.94 | 3944.61 | -10.34 | -0.3% |
| Volume per Buyer (kg) | 2,572.92 | 2,538.18 | -34.74 | -1.4% |
| Spend per Trip (£) | 15.65 | 15.81 | +0.16 | +1.0% |
| Volume per Trip (kg) | 10.18 | 10.17 | -0.01 | -0.1% |
| Price per kg (£) | 1.54 | 1.55 | +0.02 | +1.1% |

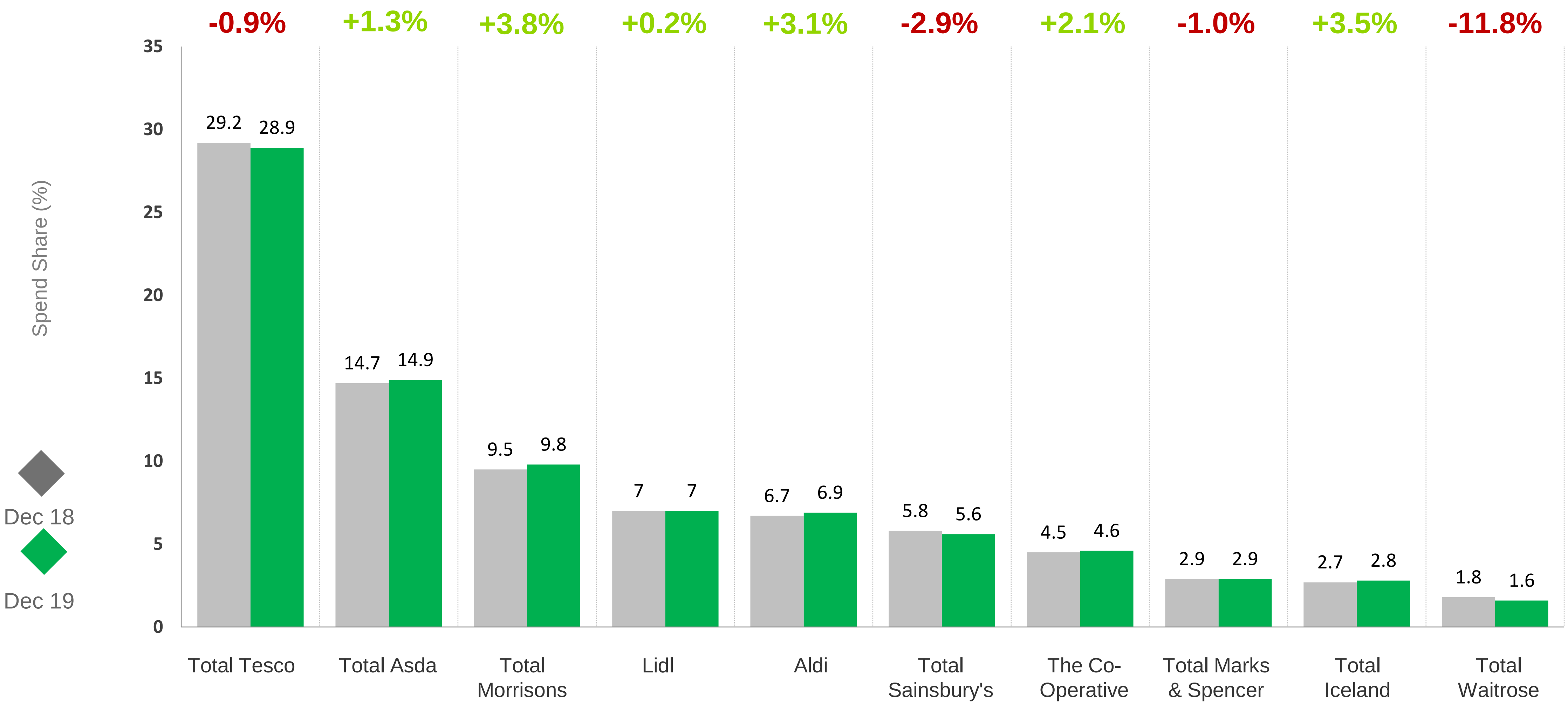
**Value up 0.2% worth £12.3m**



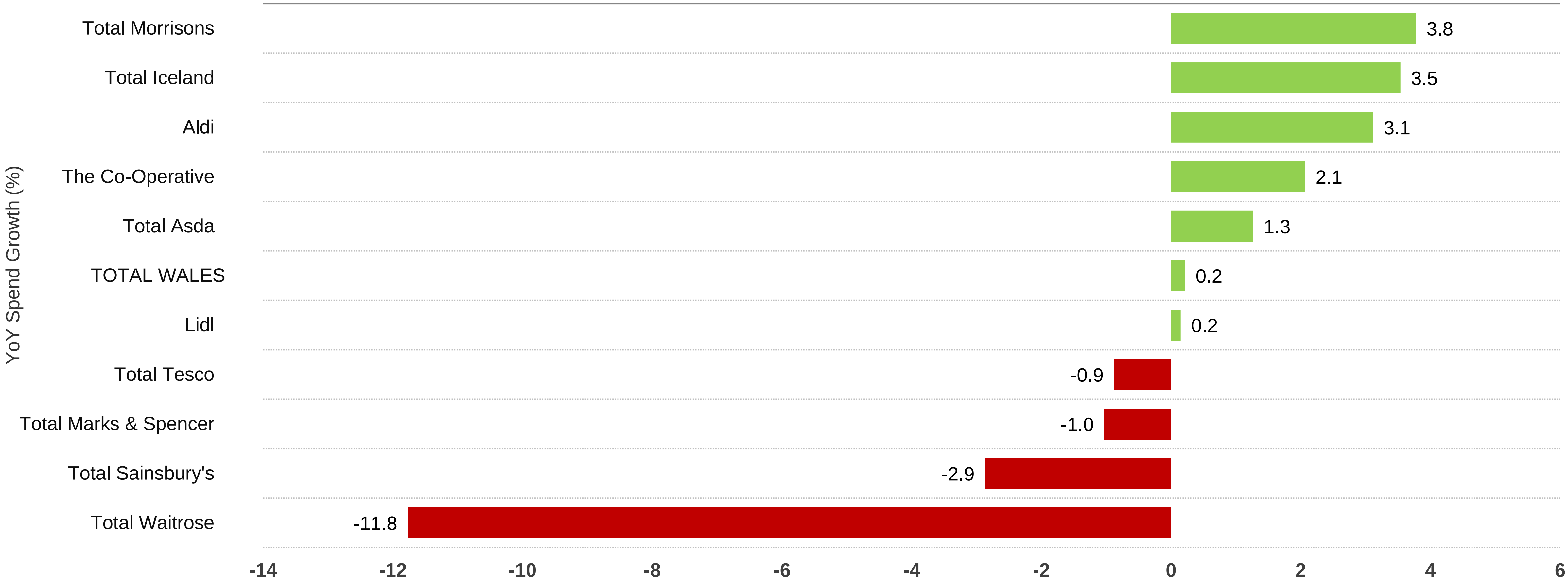

**Total Grocery grows at +1.1% across Total GB.**



# In Wales, retailer growth is very different to Total GB as the discounters are not the fastest growers. Morrisons sees the strongest growth at 3.8% from 2018.



# Asda, Coop, Aldi, Iceland and Morrisons all grow ahead of the Welsh market average. Waitrose is the worst performing retailer, declining 11.8%. It were the worst performing retailer in 2018 also, although their decline this year is not as significant.



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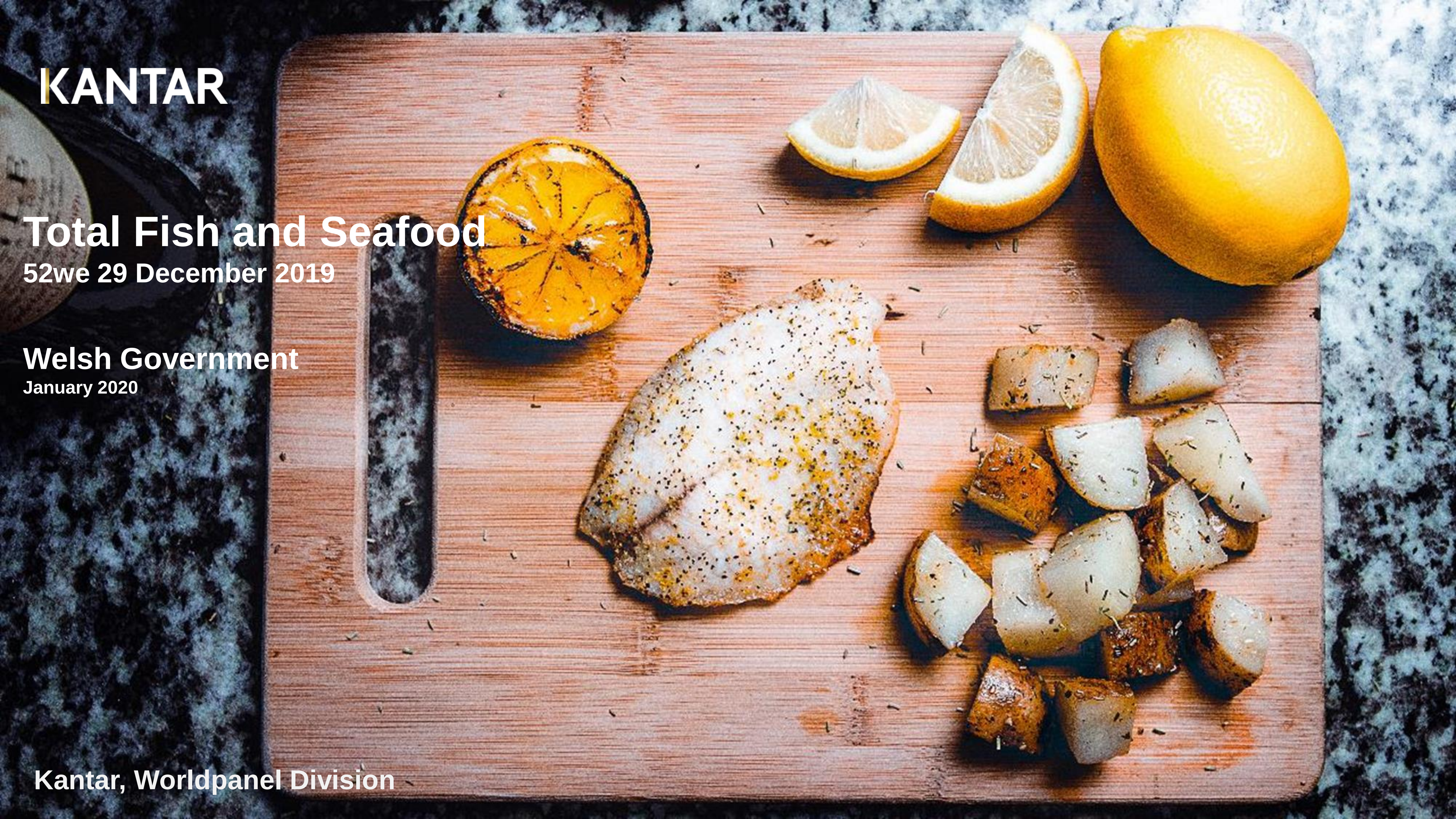
# Total Fish and Seafood

## 52we 29 December 2019



## Welsh Government

January 2020

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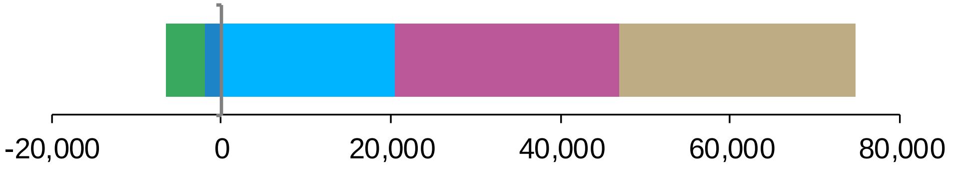
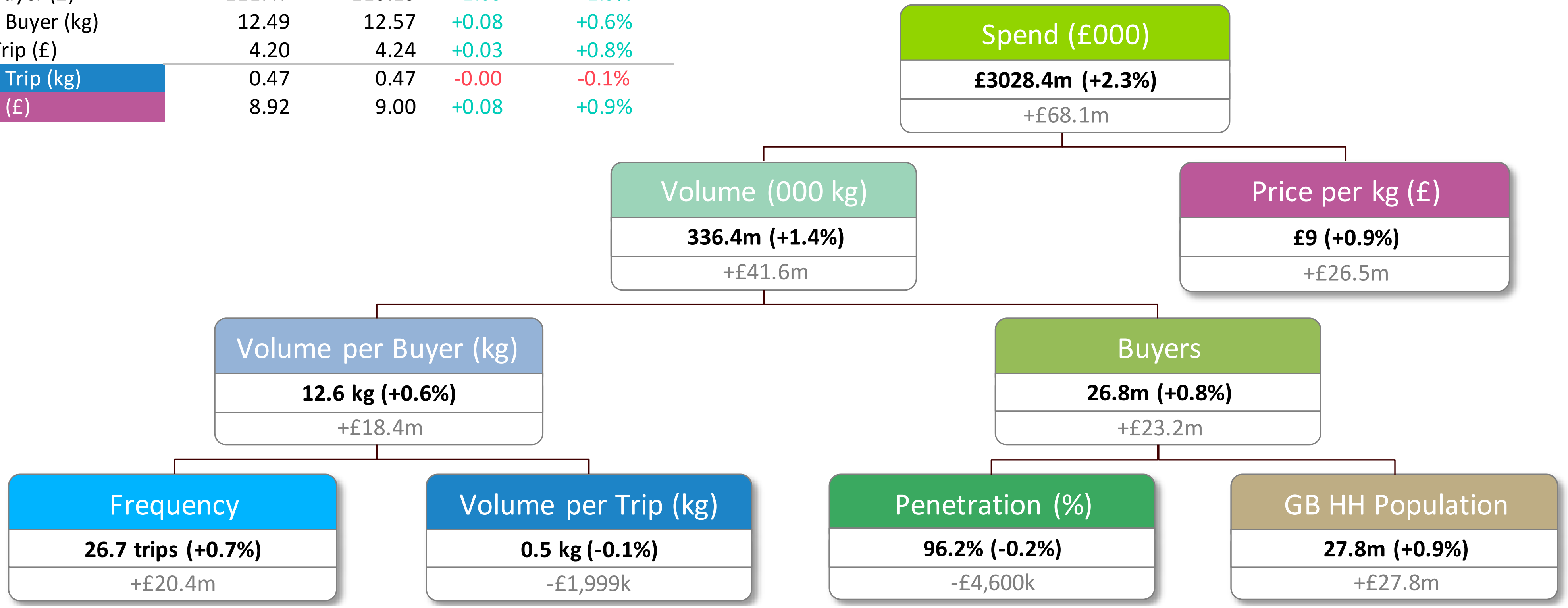
# The Total GB Fish and Seafood Market is growing at 2.3%, with frequency and increased average prices being the main contributors.

| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 2,960,368 | 3,028,431 | +68,063 | +2.3% |
| Volume (000 kg) | 331,796 | 336,436 | +4,640 | +1.4% |
| Penetration (%) | 96.37 | 96.22 | -0.15 | -0.2% |
| Frequency | 26.52 | 26.70 | +0.18 | +0.7% |
| Spend per Buyer (£) | 111.47 | 113.15 | +1.69 | +1.5% |
| Volume per Buyer (kg) | 12.49 | 12.57 | +0.08 | +0.6% |
| Spend per Trip (£) | 4.20 | 4.24 | +0.03 | +0.8% |
| Volume per Trip (kg) | 0.47 | 0.47 | -0.00 | -0.1% |
| Price per kg (£) | 8.92 | 9.00 | +0.08 | +0.9% |

**Value up 2.3% worth £68.1m**

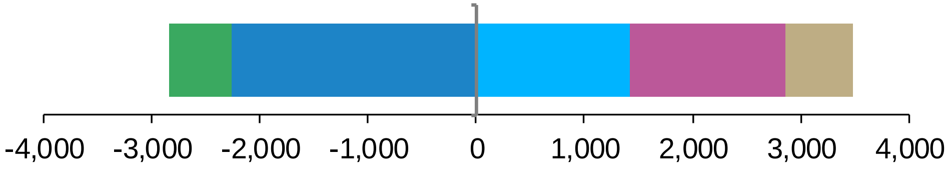


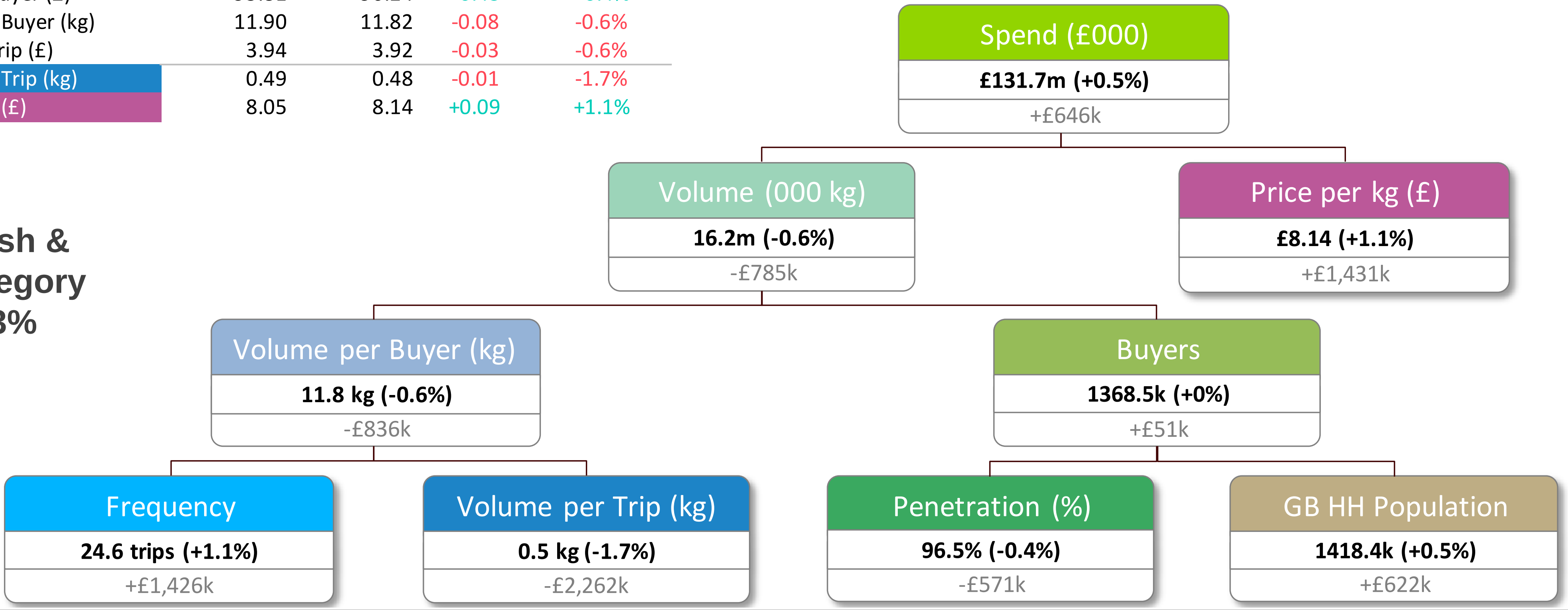
# The Welsh Fish and Seafood Market is growing below the Total GB Market, with significant reductions in volume per trip and penetration restricting growth.

| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 131,057 | 131,703 | +646 | +0.5% |
| Volume (000 kg) | 16,276 | 16,179 | -97 | -0.6% |
| Penetration (%) | 96.90 | 96.48 | -0.42 | -0.4% |
| Frequency | 24.30 | 24.56 | +0.27 | +1.1% |
| Spend per Buyer (£) | 95.81 | 96.24 | +0.43 | +0.4% |
| Volume per Buyer (kg) | 11.90 | 11.82 | -0.08 | -0.6% |
| Spend per Trip (£) | 3.94 | 3.92 | -0.03 | -0.6% |
| Volume per Trip (kg) | 0.49 | 0.48 | -0.01 | -1.7% |
| Price per kg (£) | 8.05 | 8.14 | +0.09 | +1.1% |

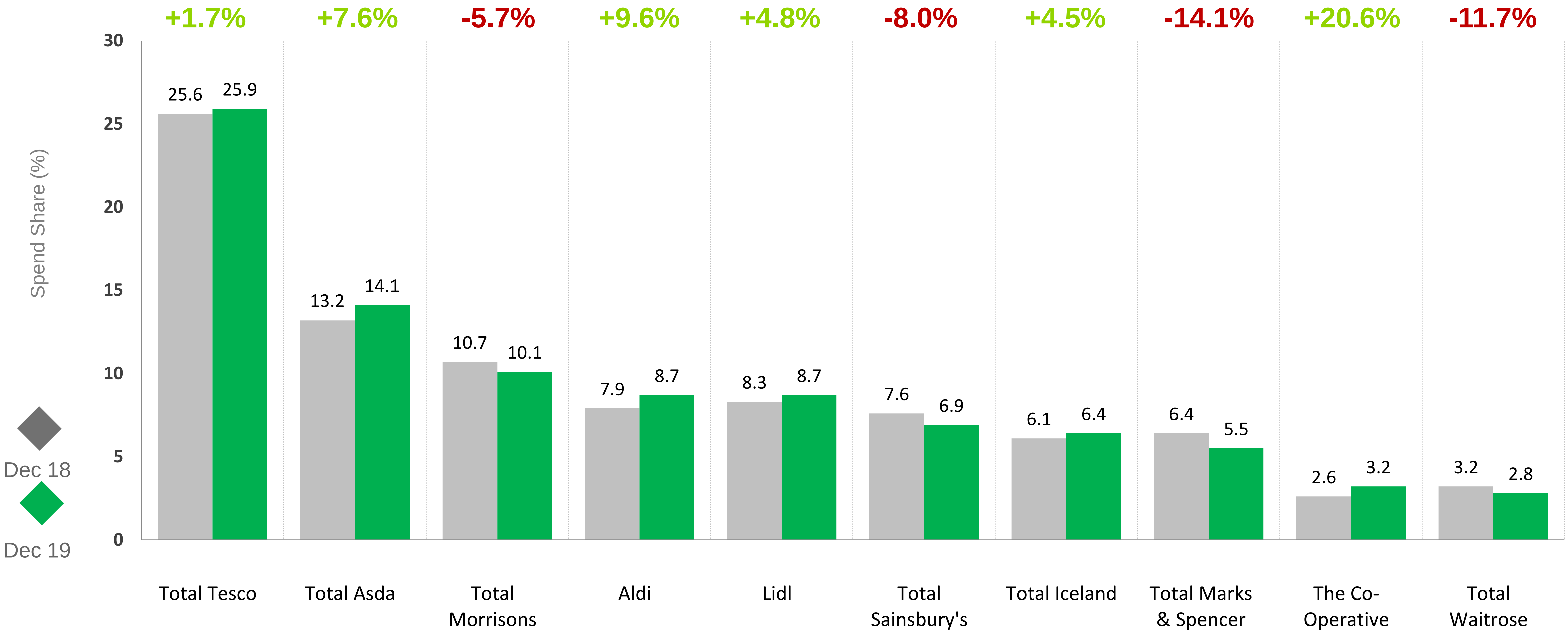
**Value up 0.5% worth £646k**



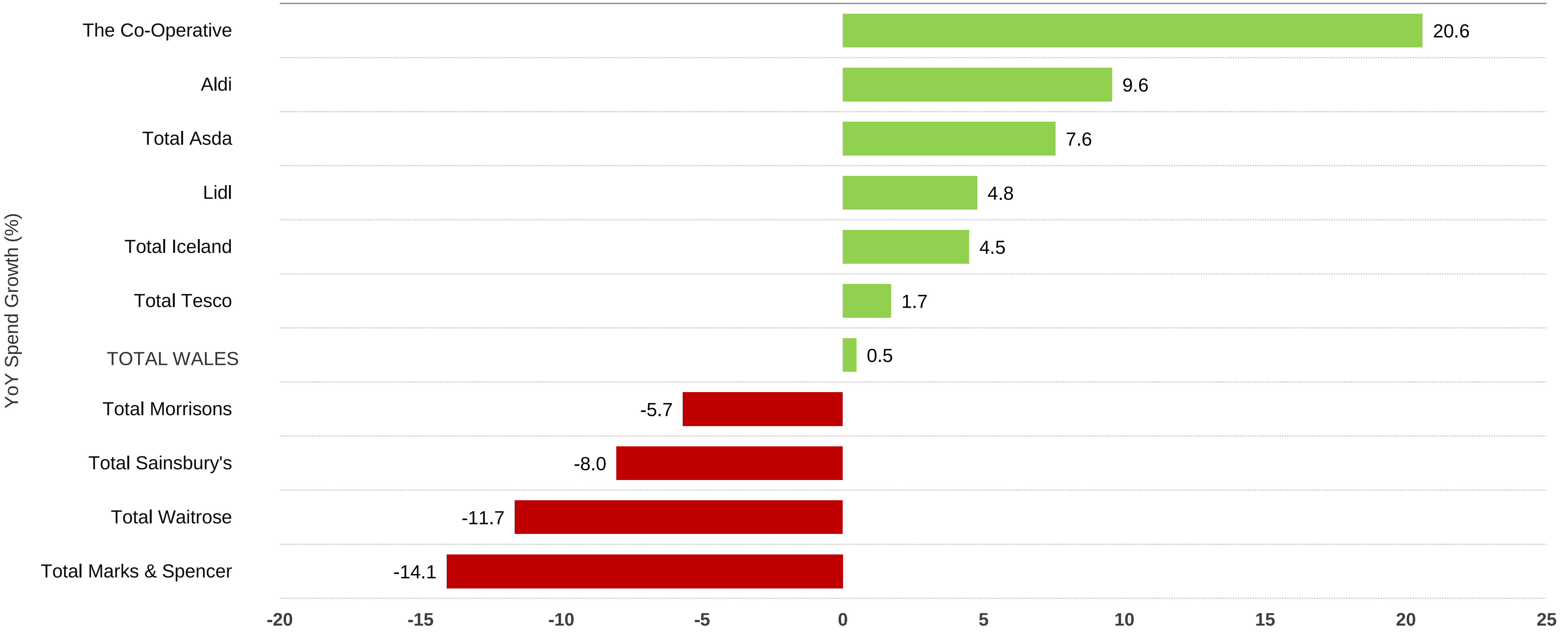

**Total GB Fish & Seafood category is up +2.3%**



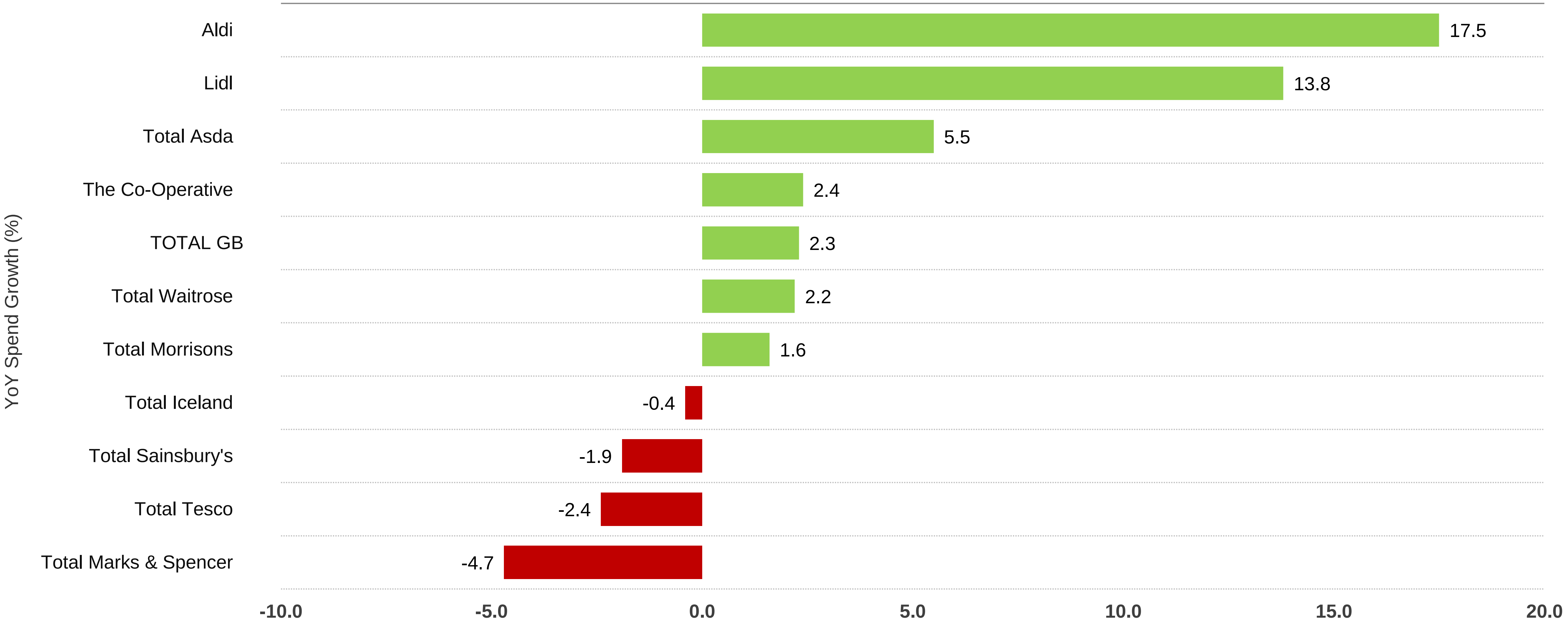
# The Co-Operative record the strongest growth in Wales at +20.6%, growing their share by 0.6ppts. Marks and Spencer see the greatest decline, losing 0.9ppts.



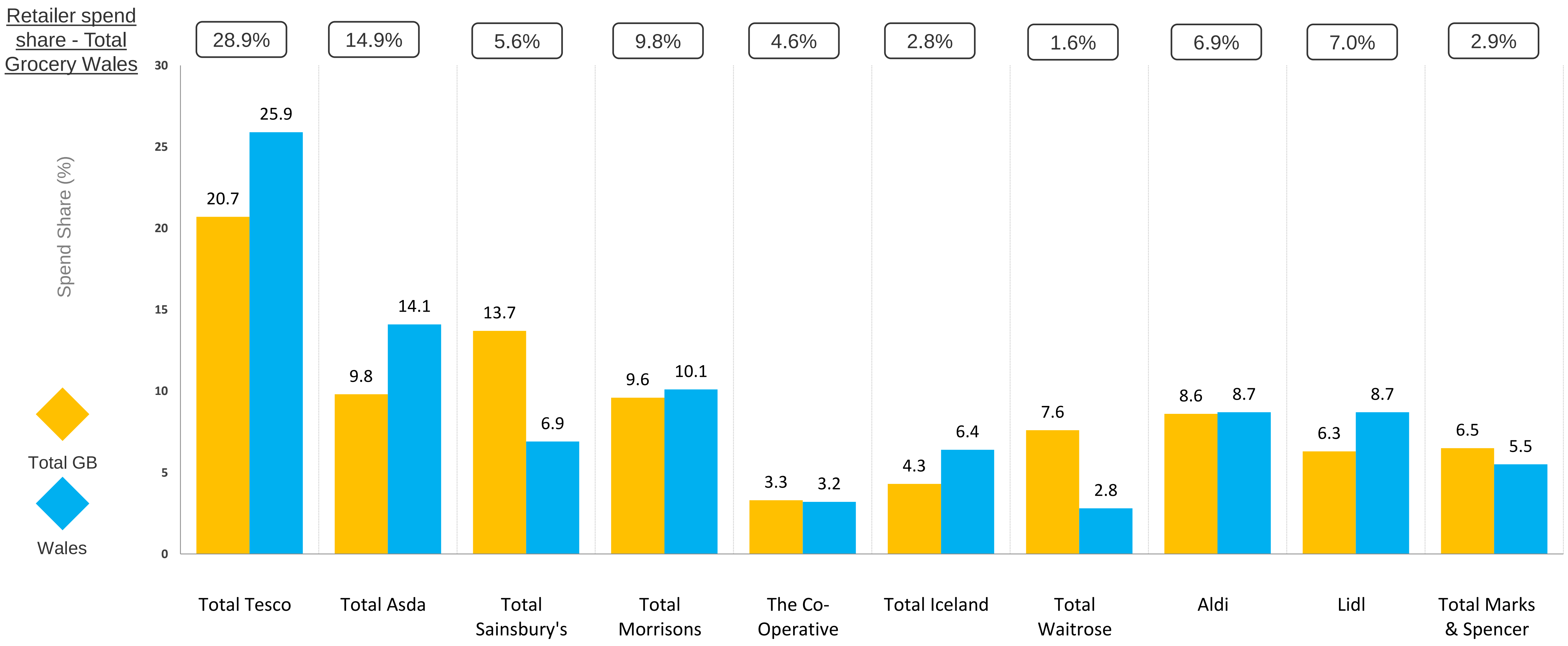
# Aldi, Asda, The Co-Operative, Iceland and Tesco experience strong growth in the Welsh Fish and Seafood market, ahead of their growth in Welsh Total Grocery and Total GB Grocery.



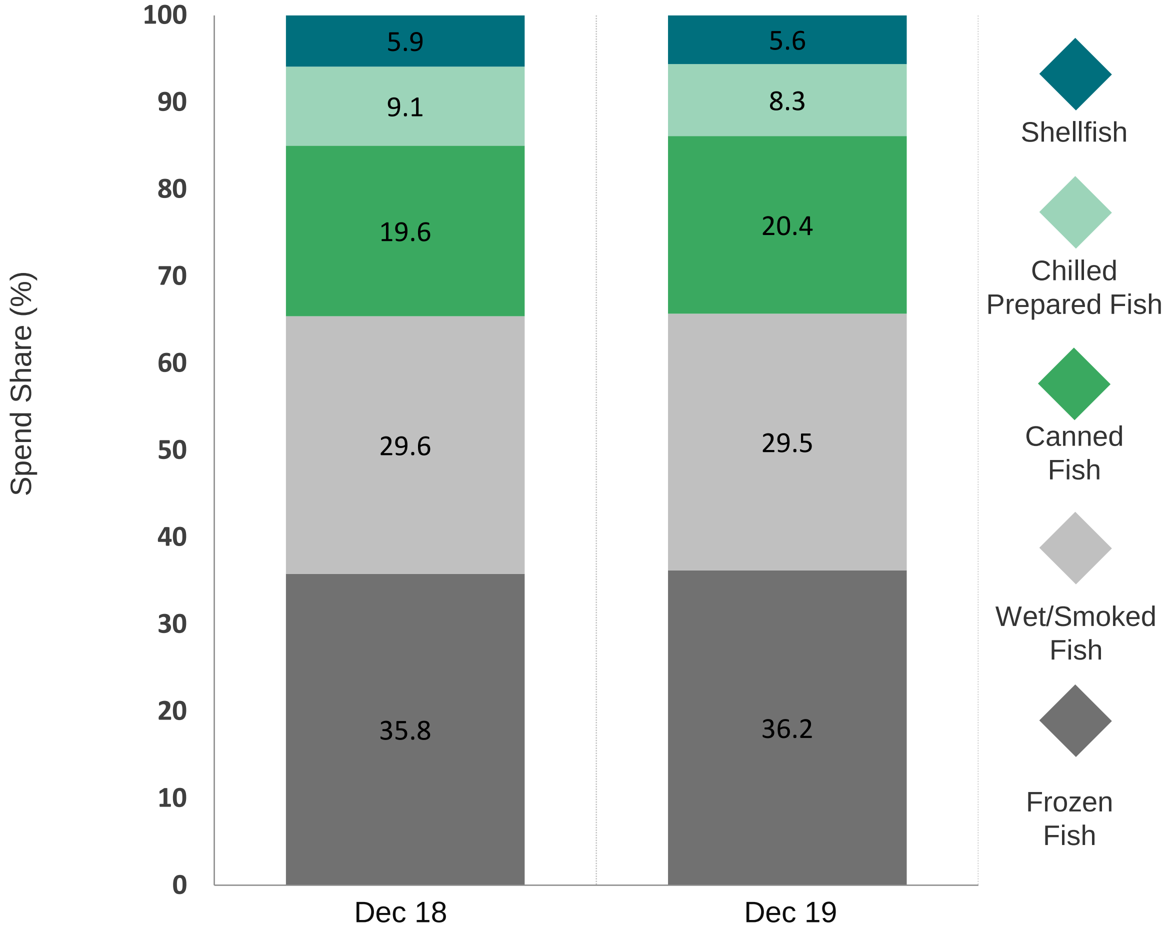
# Aldi and Lidl are seeing strong growth in Total GB Fish and Seafood, ahead of their growth in the Welsh Fish and Seafood Market.

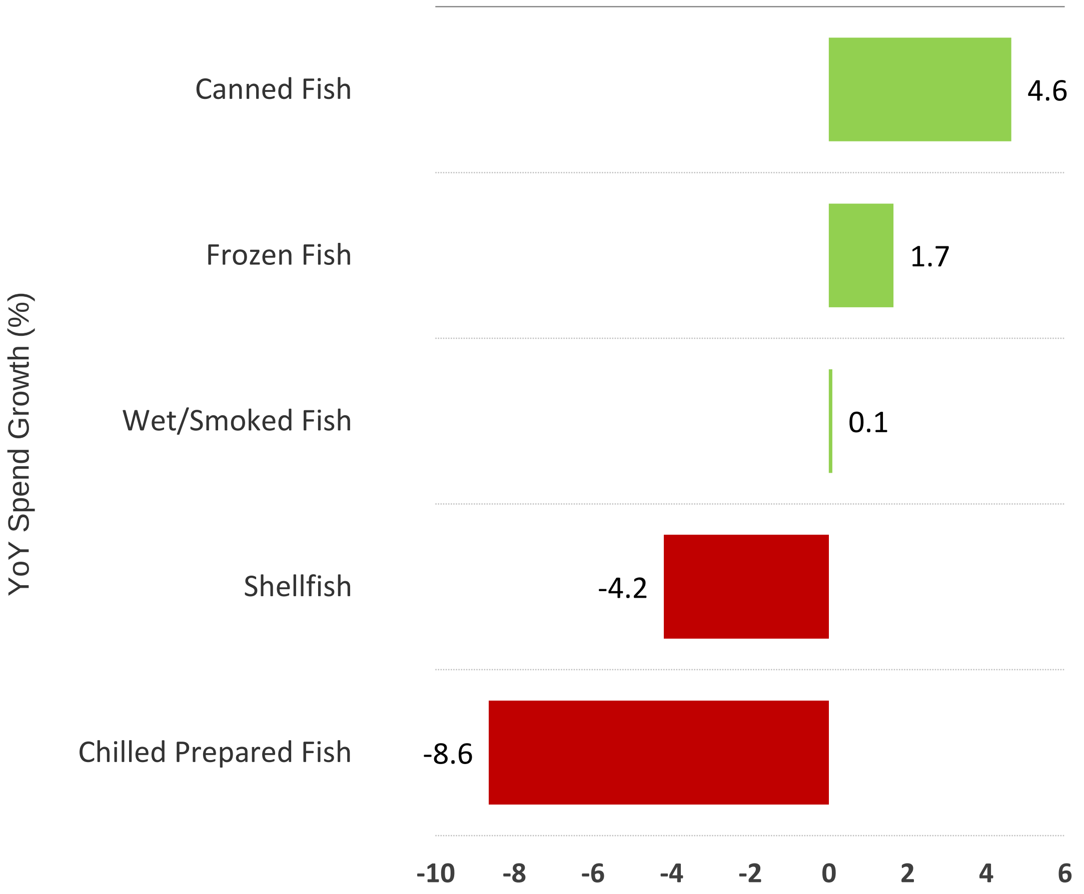


# Of the Big 4, Tesco, Asda and Morrisons overtrade in the Welsh Fish and Seafood Market compared to their share in the market across GB.

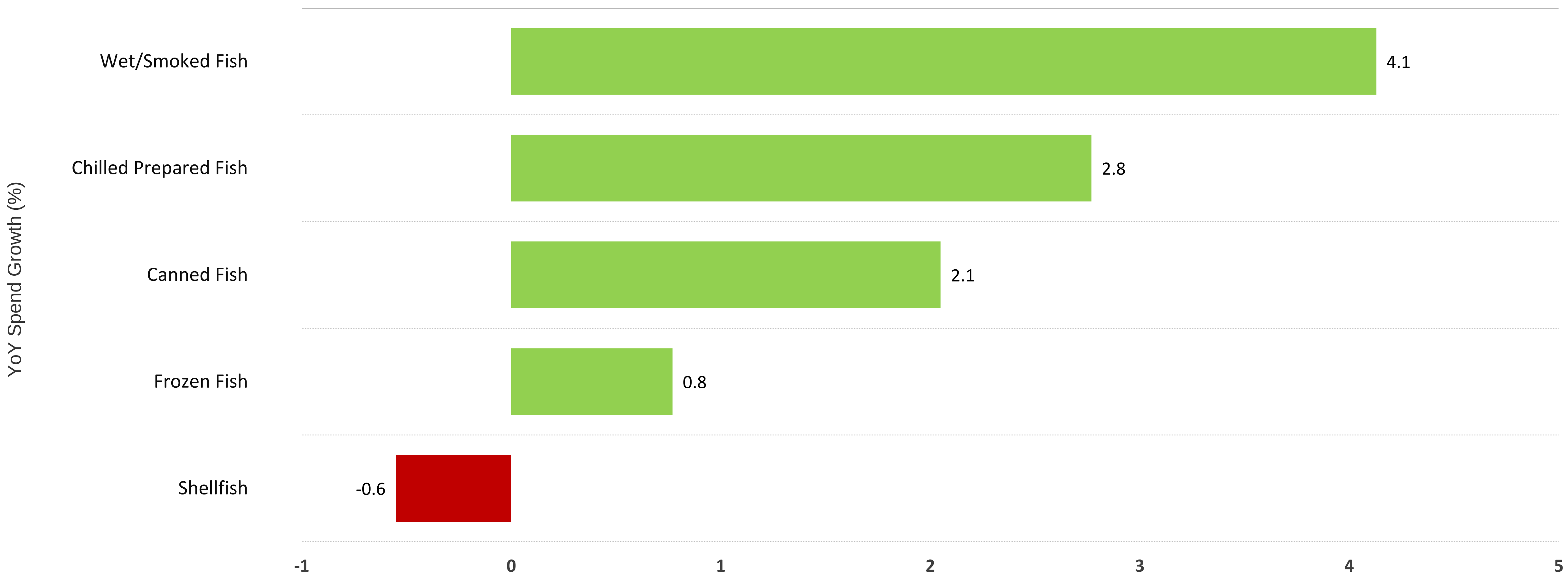


# Chilled Prepared Fish saw the greatest change in the Welsh Fish and Seafood Market, declining -8.6% and losing 0.8ppts in share. Canned fish saw the greatest growth, increasing it's share by 0.8ppts.



# At a total GB level only Shellfish saw a decline in growth, whereas Chilled Prepared Fish saw the second largest growth rate of +2.8% despite being the strongest decliner in Wales.



# The GB Fish Market attracts a more affluent shopper than GB Total Grocery and the Welsh Fish Market. The Fish Market, at both GB and Wales level, sees a greater proportion of spend from older shoppers in comparison to the Grocery market average.

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# Total Beverages

## 52we 29 December 2019

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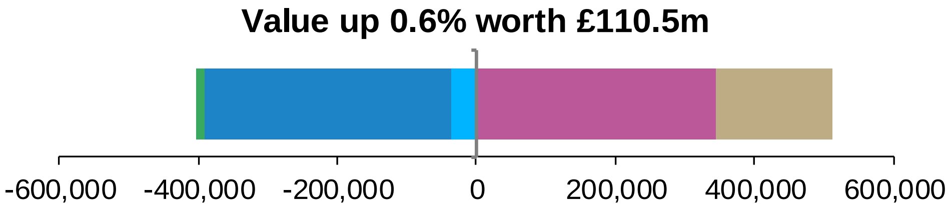
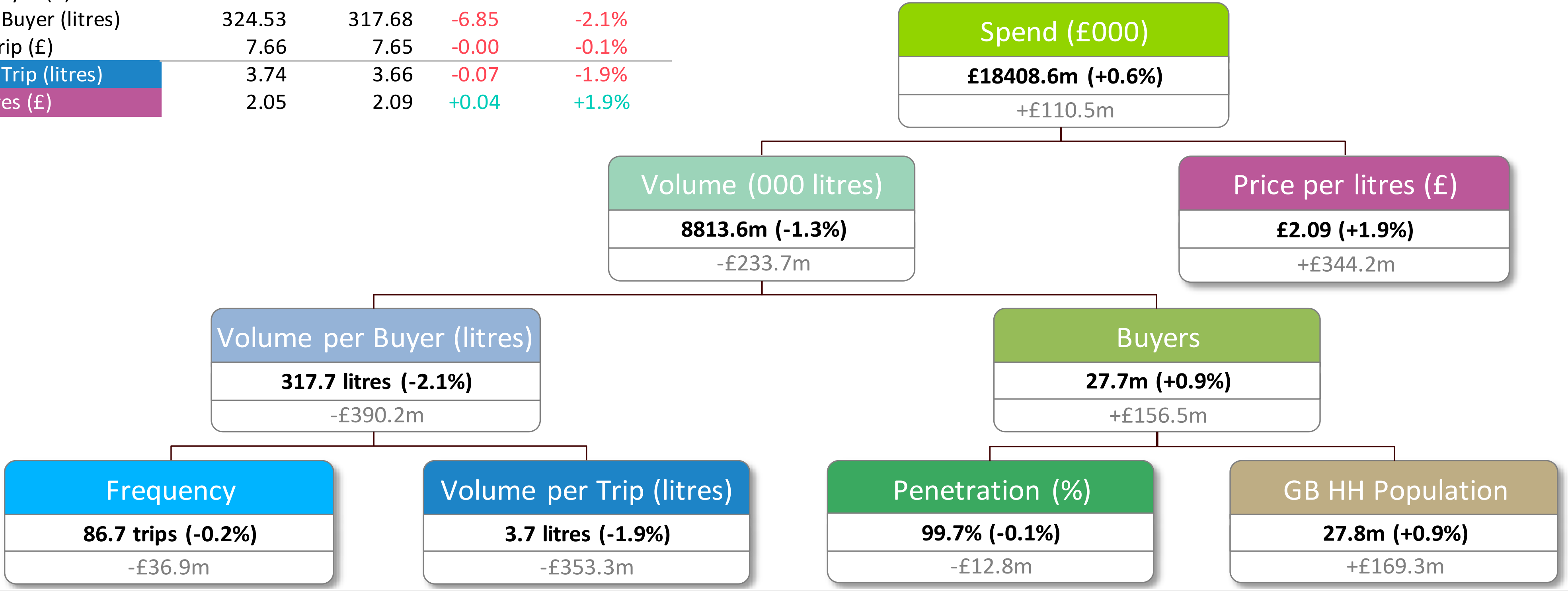
# The GB Beverages Market is reliant on price increases for growth and as volume decline nearly counters price growth completely, the market grows behind Grocery's average of +1.1%

| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 18,298,110 | 18,408,610 | +110,500 | +0.6% |
| Volume (000 litres) | 8,926,833 | 8,813,610 | -113,223 | -1.3% |
| Penetration (%) | 99.81 | 99.74 | -0.07 | -0.1% |
| Frequency | 86.87 | 86.69 | -0.17 | -0.2% |
| Spend per Buyer (£) | 665.22 | 663.52 | -1.70 | -0.3% |
| Volume per Buyer (litres) | 324.53 | 317.68 | -6.85 | -2.1% |
| Spend per Trip (£) | 7.66 | 7.65 | -0.00 | -0.1% |
| Volume per Trip (litres) | 3.74 | 3.66 | -0.07 | -1.9% |
| Price per litres (£) | 2.05 | 2.09 | +0.04 | +1.9% |

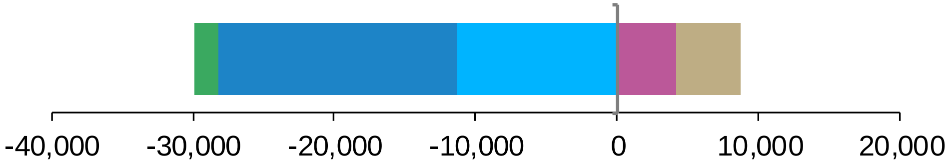


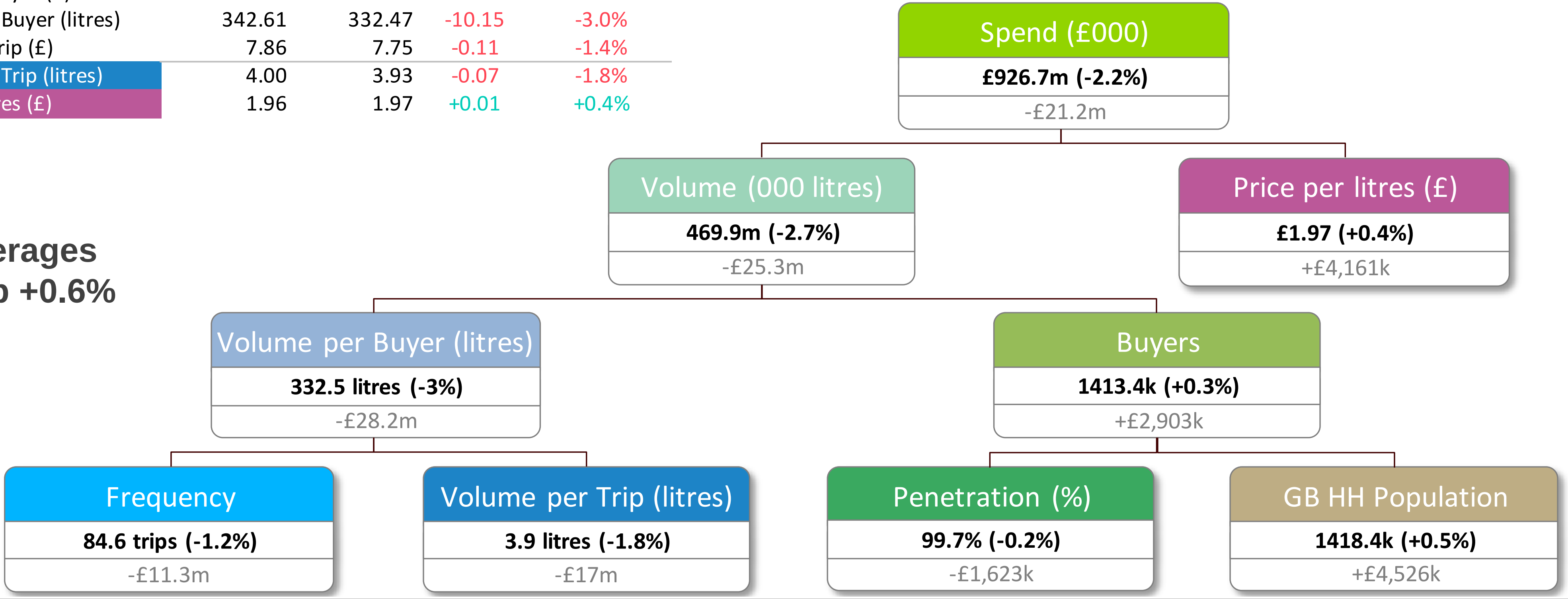
# Stronger frequency decline and lower price growth within Wales means the Welsh Beverages market is in decline.

| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 947,836 | 926,660 | -21,176 | -2.2% |
| Volume (000 litres) | 482,752 | 469,908 | -12,844 | -2.7% |
| Penetration (%) | 99.82 | 99.65 | -0.17 | -0.2% |
| Frequency | 85.63 | 84.61 | -1.02 | -1.2% |
| Spend per Buyer (£) | 672.69 | 655.62 | -17.07 | -2.5% |
| Volume per Buyer (litres) | 342.61 | 332.47 | -10.15 | -3.0% |
| Spend per Trip (£) | 7.86 | 7.75 | -0.11 | -1.4% |
| Volume per Trip (litres) | 4.00 | 3.93 | -0.07 | -1.8% |
| Price per litres (£) | 1.96 | 1.97 | +0.01 | +0.4% |

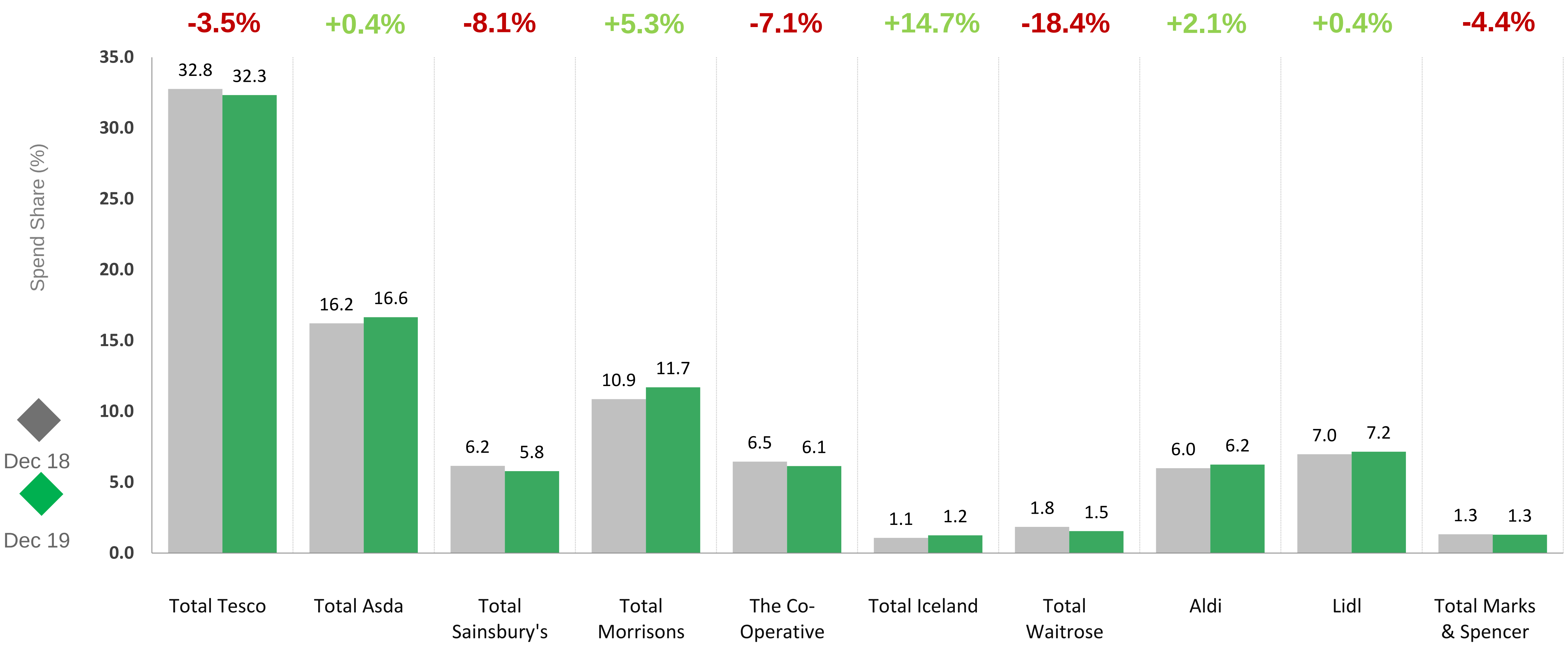
**Value down 2.2% worth £21.2m**



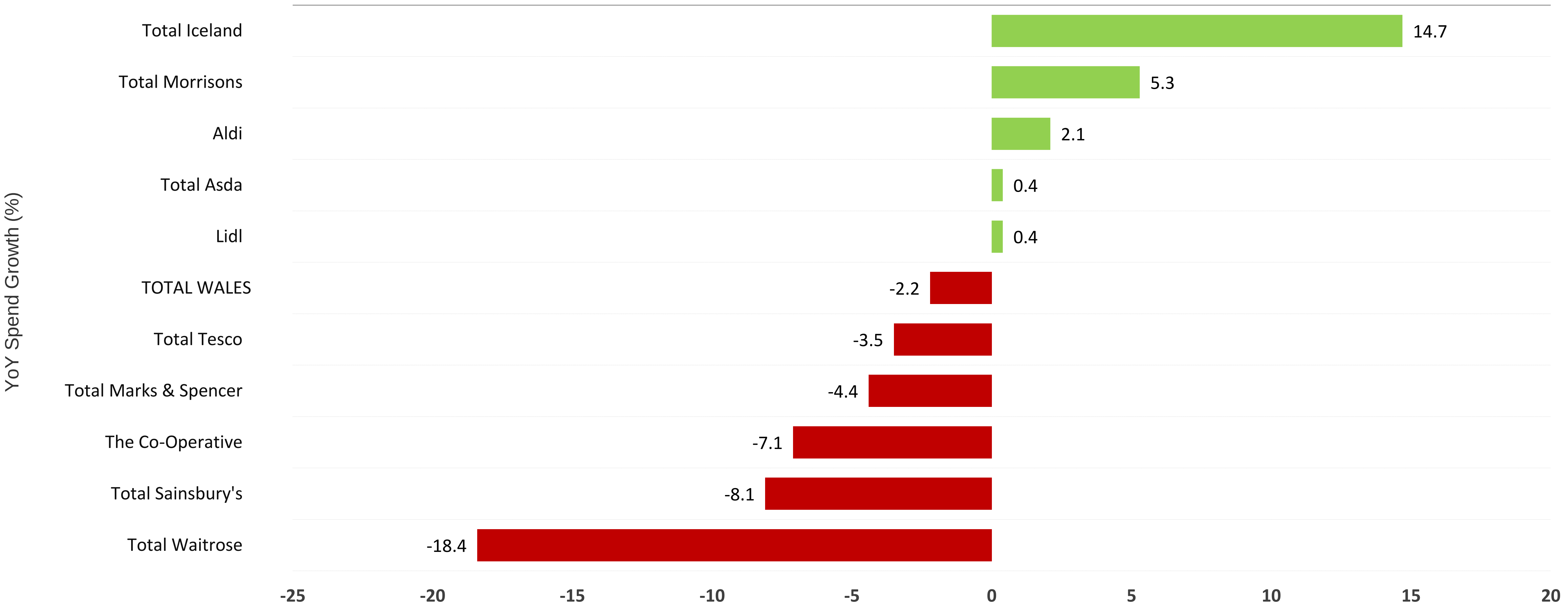

**The GB Beverages category is up +0.6%**



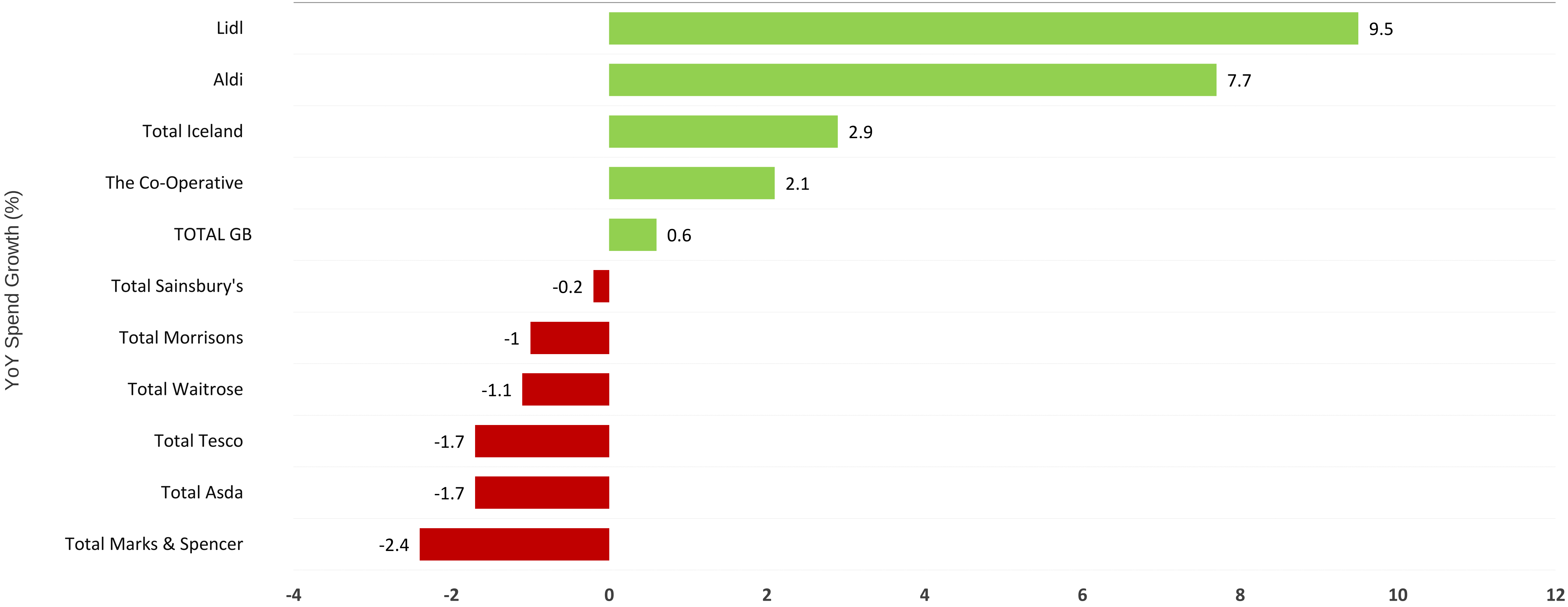
# Morrisons saw +5.3% growth in Welsh Beverages, gaining 0.8ppts in share, the largest gain across all the major retailers.  Premium retailers, M&S and Waitrose both saw decline.



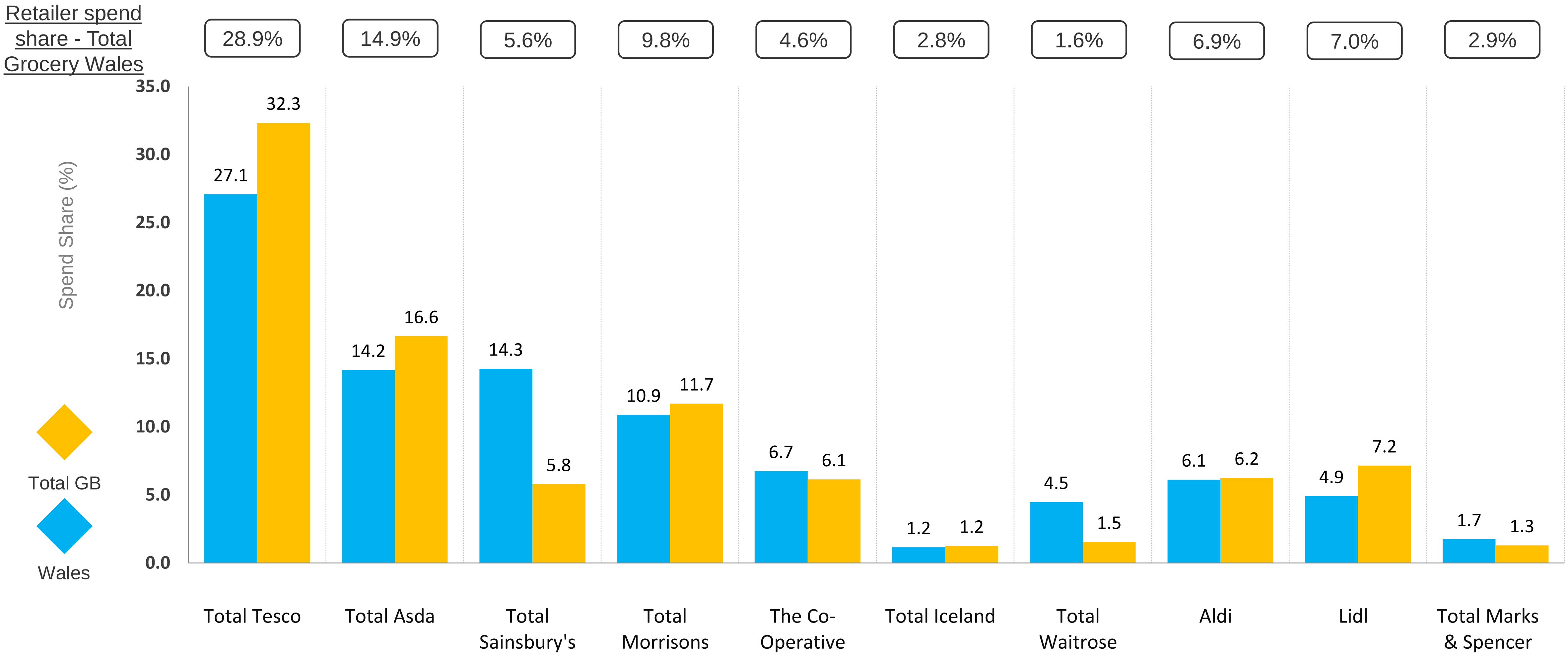
# In Wales, Waitrose declined the steepest within Beverages (-18.4%). Only 3 retailers boasted growth of more than 1%, although all those in growth gained share. .



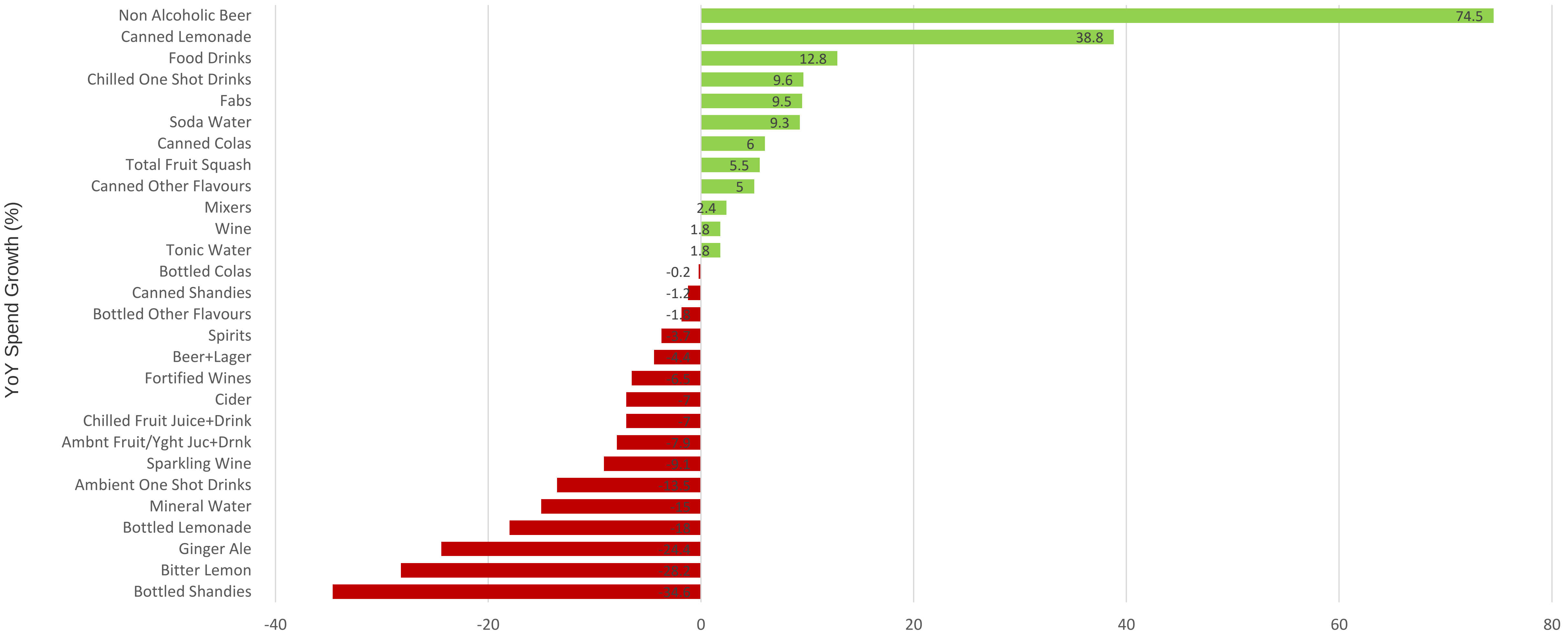
# At a GB level, it is the Discounters who have performed strongest this year. Asda and Morrison's growth in Wales was not reflected across GB as all of the Big 4 declined.



# In Wales, only Morrisons and Co-Op over trade vs their Wales Grocery share, whereas all other retailers have an opportunity to achieve their fair share.



# Non Alcoholic Beers are the fastest growing beverage sector in Wales at +74.5%, albeit off a small base. The sector is now worth £1.8m.  Beer & Lager saw the strongest decline of £5.8m.

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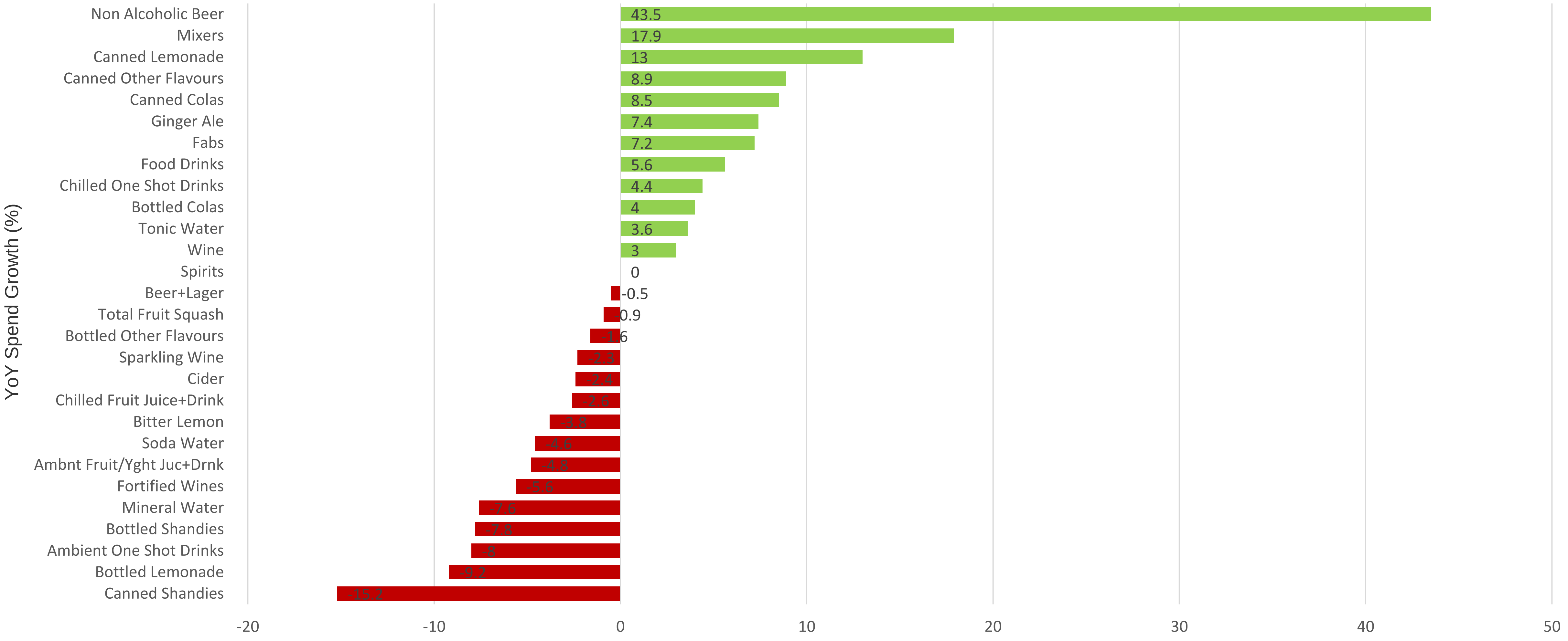
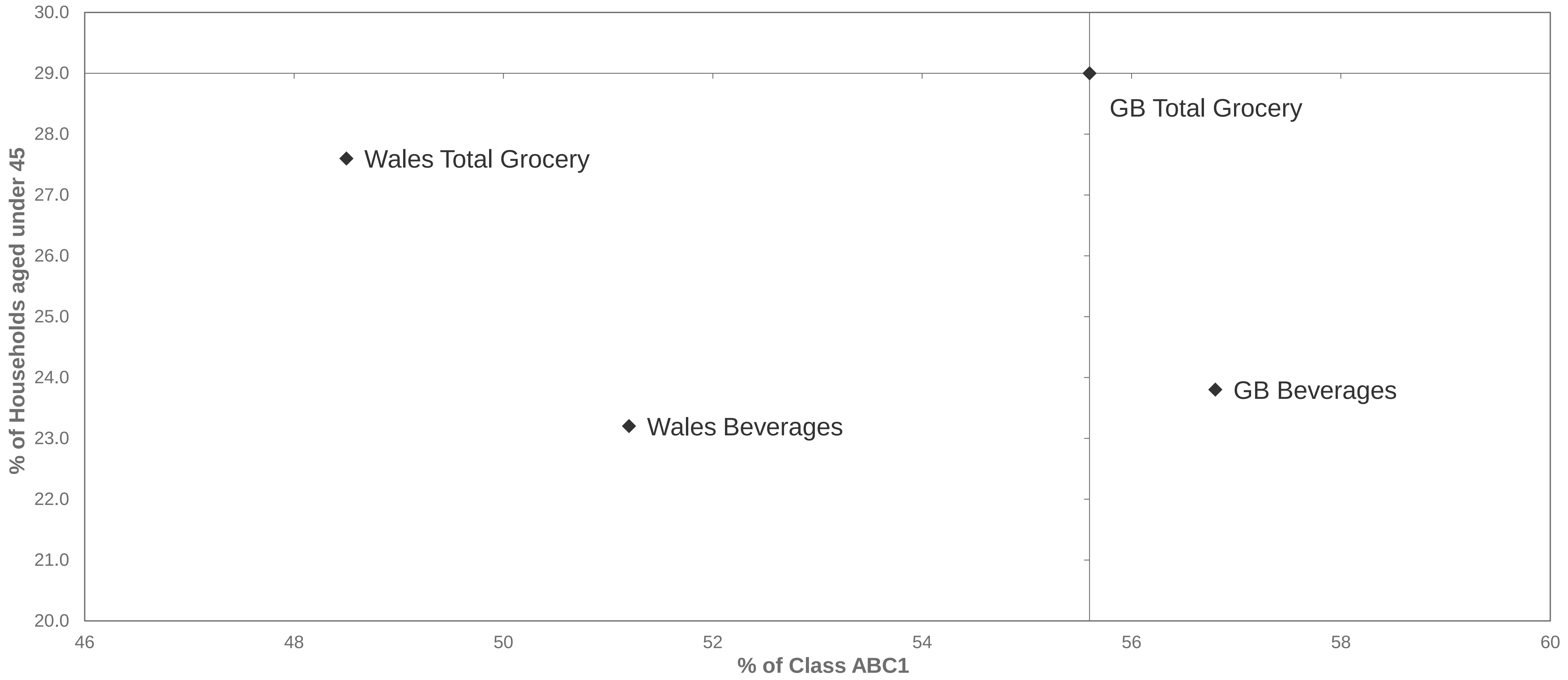
# Non Alcoholic Beer's phenomenal growth is seen across GB too (+43.5%). Canned Shandies (-15.2%) and Bottled Lemonade (-9.2%) saw the heaviest decline.



# Welsh Beverage shoppers to be older and less affluent than the Total GB Beverage shopper.



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# Total Bakery

## 52we 29 December 2019

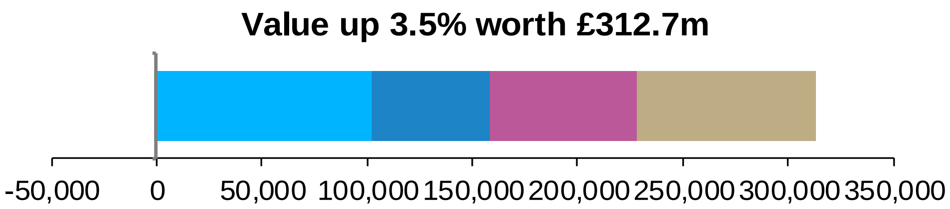
## Welsh Government

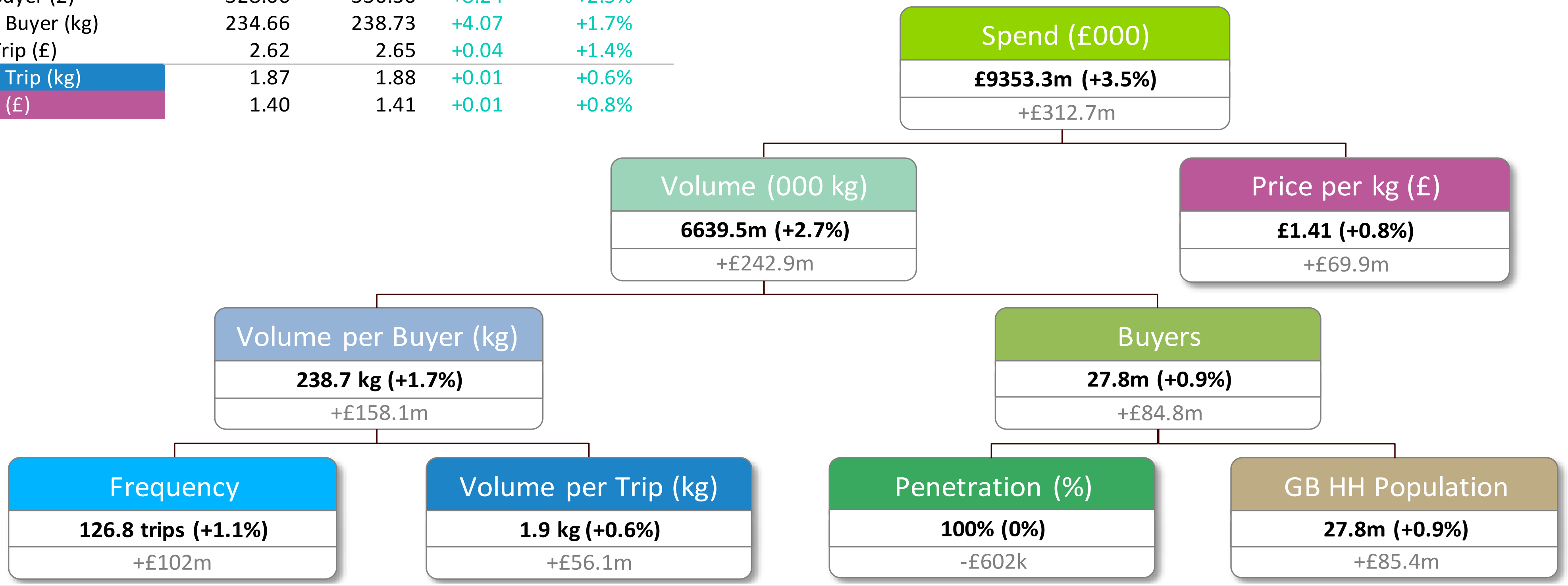
January 2020

Kantar, Worldpanel Division

# Total GB Bakery has seen strong growth as all measures grow, with shoppers purchasing bakery products more often than they were in 2018 being the strongest driver.

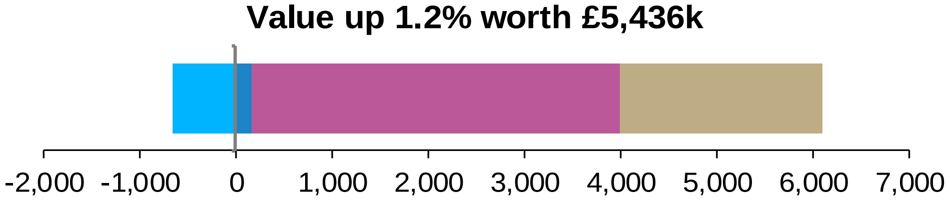
| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 9,040,592 | 9,353,326 | +312,734 | +3.5% |
| Volume (000 kg) | 6,466,537 | 6,639,536 | +172,999 | +2.7% |
| Penetration (%) | 99.99 | 99.98 | -0.01 | -0.0% |
| Frequency | 125.45 | 126.85 | +1.40 | +1.1% |
| Spend per Buyer (£) | 328.06 | 336.30 | +8.24 | +2.5% |
| Volume per Buyer (kg) | 234.66 | 238.73 | +4.07 | +1.7% |
| Spend per Trip (£) | 2.62 | 2.65 | +0.04 | +1.4% |
| Volume per Trip (kg) | 1.87 | 1.88 | +0.01 | +0.6% |
| Price per kg (£) | 1.40 | 1.41 | +0.01 | +0.8% |



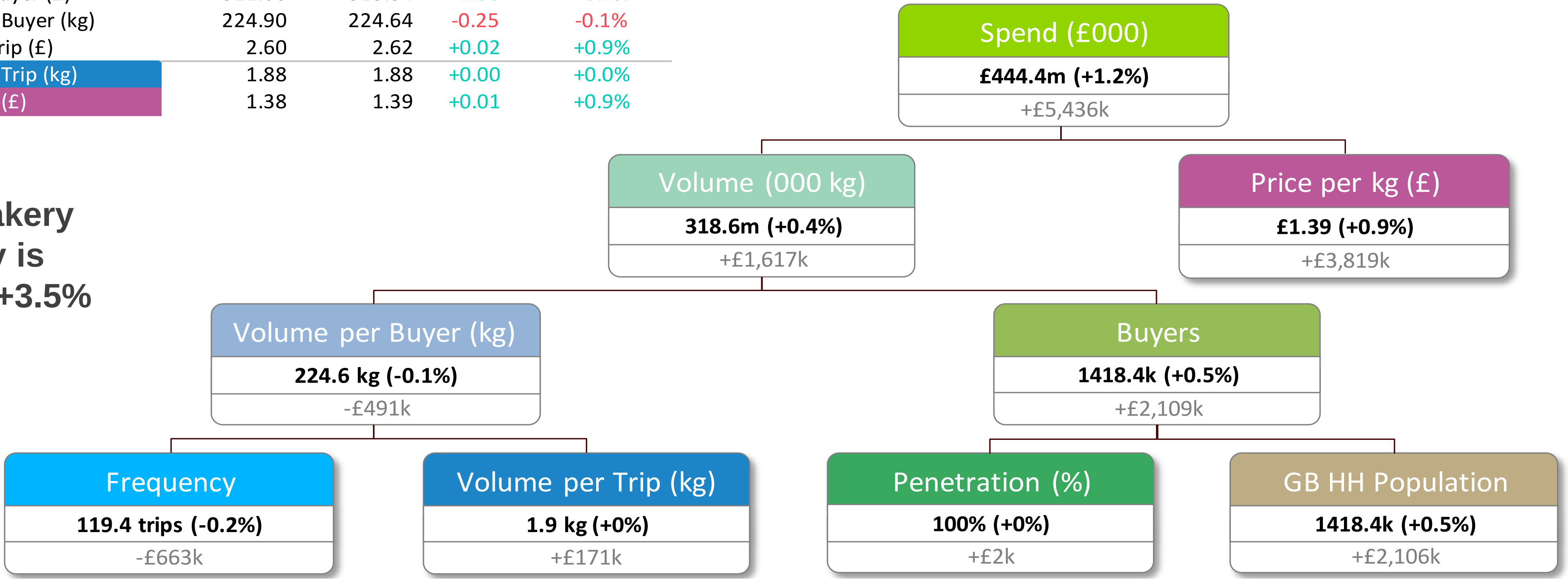



# The Welsh Bakery Market is seeing slightly lower growth than of GB Bakery, as frequency restricts performance, despite this being the strongest contributor at Total Market level.

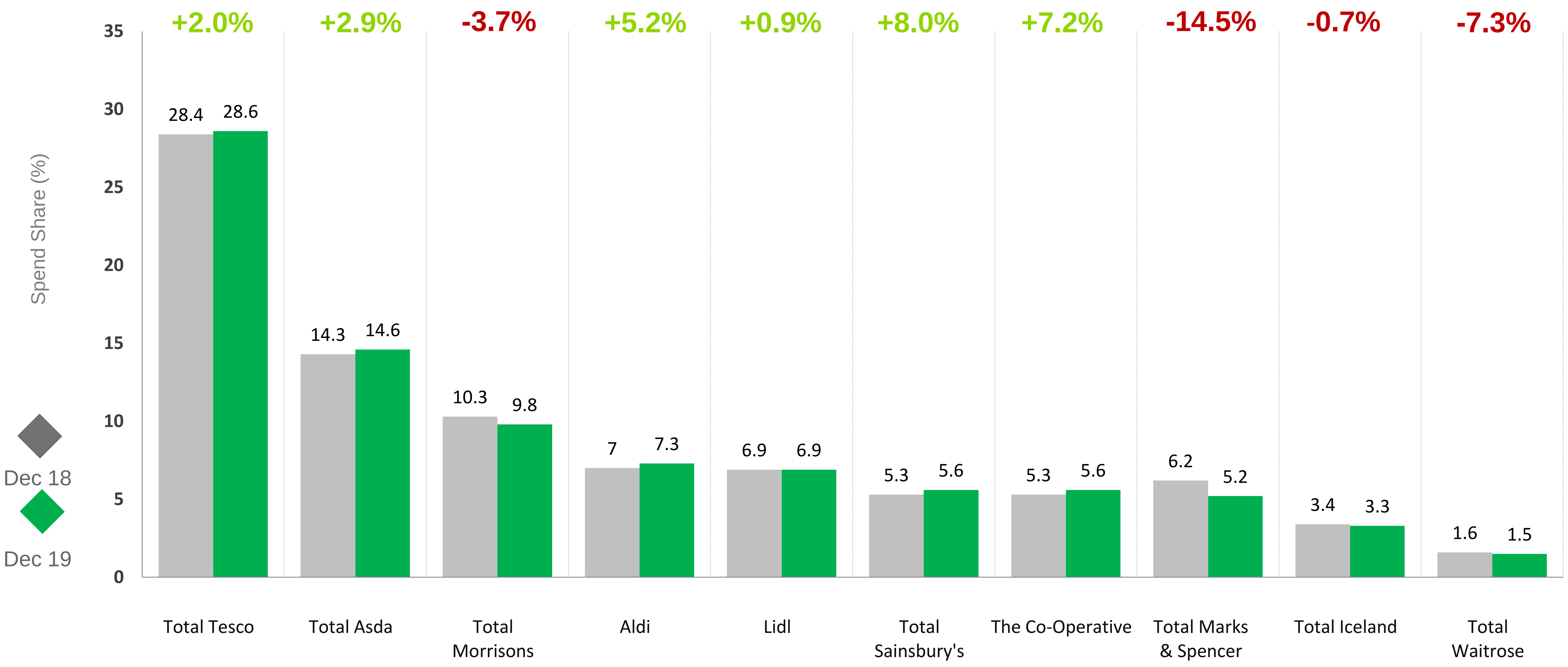
| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 438,984 | 444,420 | +5,436 | +1.2% |
| Volume (000 kg) | 317,447 | 318,621 | +1,174 | +0.4% |
| Penetration (%) | 100.00 | 100.00 | +0.00 | +0.0% |
| Frequency | 119.63 | 119.45 | -0.18 | -0.2% |
| Spend per Buyer (£) | 311.00 | 313.34 | +2.33 | +0.7% |
| Volume per Buyer (kg) | 224.90 | 224.64 | -0.25 | -0.1% |
| Spend per Trip (£) | 2.60 | 2.62 | +0.02 | +0.9% |
| Volume per Trip (kg) | 1.88 | 1.88 | +0.00 | +0.0% |
| Price per kg (£) | 1.38 | 1.39 | +0.01 | +0.9% |



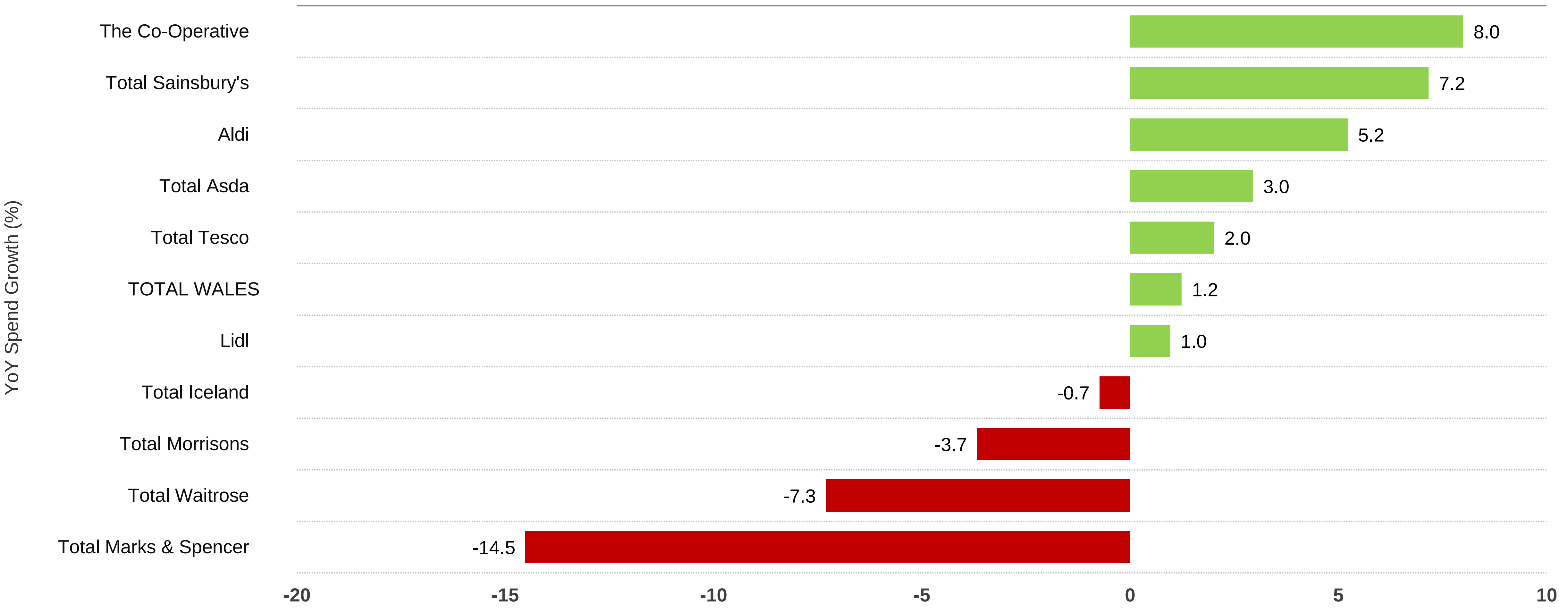

**The GB Bakery Category is growing at +3.5%**



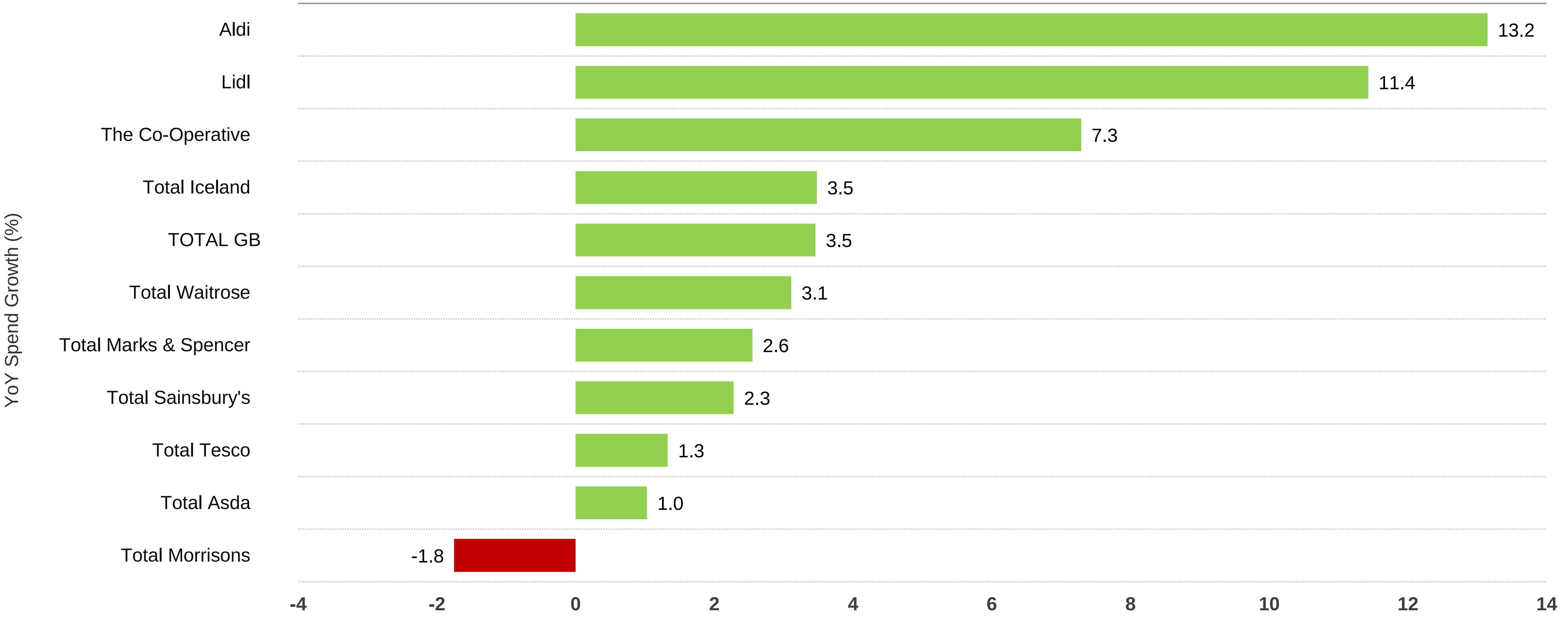
# Out of the Big 4, only Morrisons sees a decline, losing 0.5ppts of share. Sainsbury's see strong growth in the Welsh Bakery market, increasing their share by 0.3ppts.



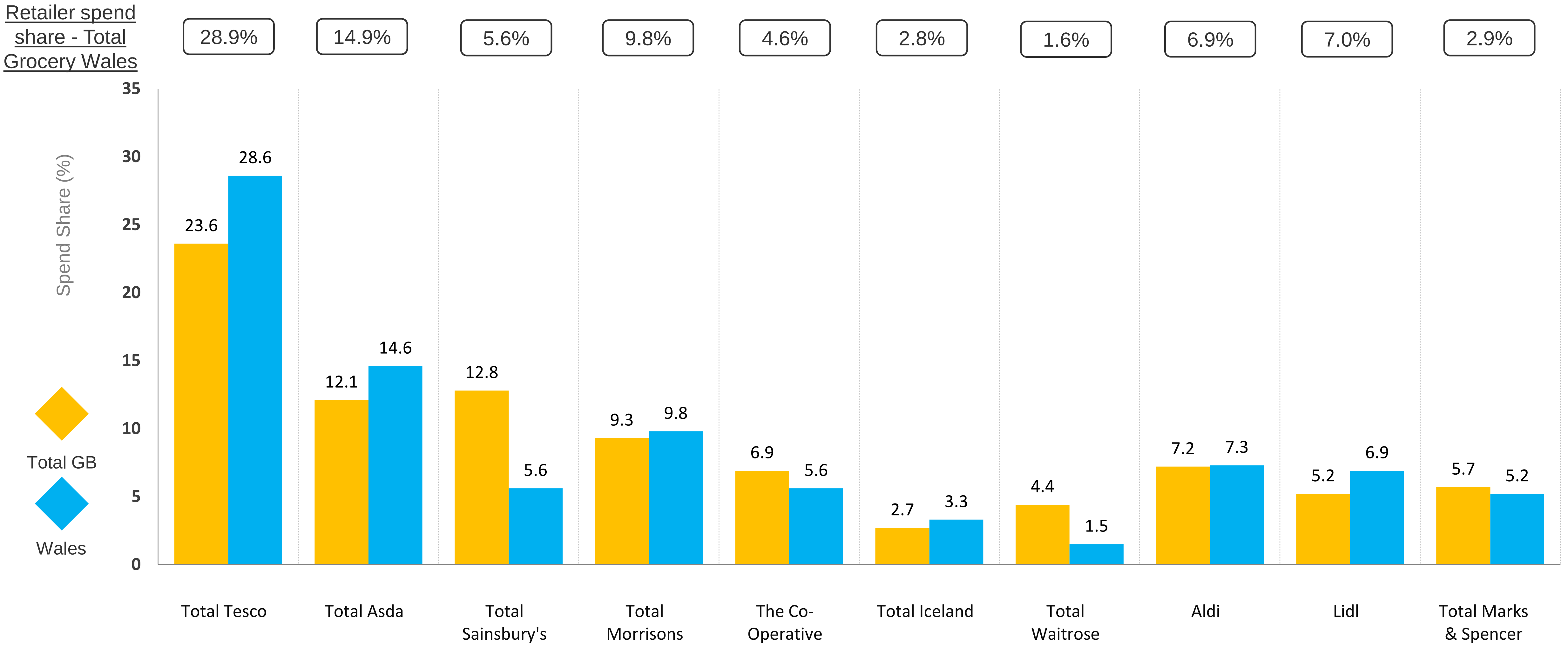
# The Co-Operative and Sainsbury's see the greatest growth, with Waitrose seeing decline, although their decline is not as significant as that of across Total Grocery in Wales.



# At a GB level, the picture is quite different as Morrisons are the only retailer to experience decline. Aldi and Lidl see the greatest growth and stronger than within Wales.



# Tesco has a greater share of Bakery in Wales than in GB, yet they are still under trading versus their total Welsh Grocery share by 0.3ppts.

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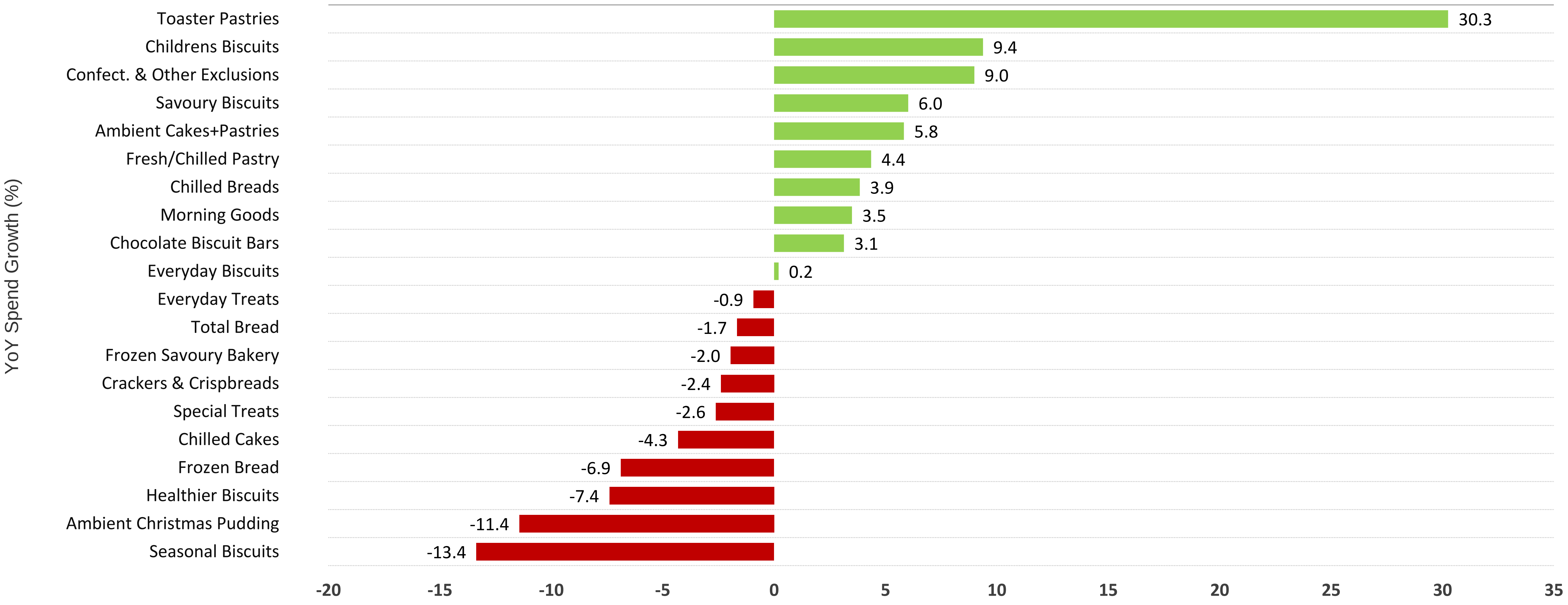
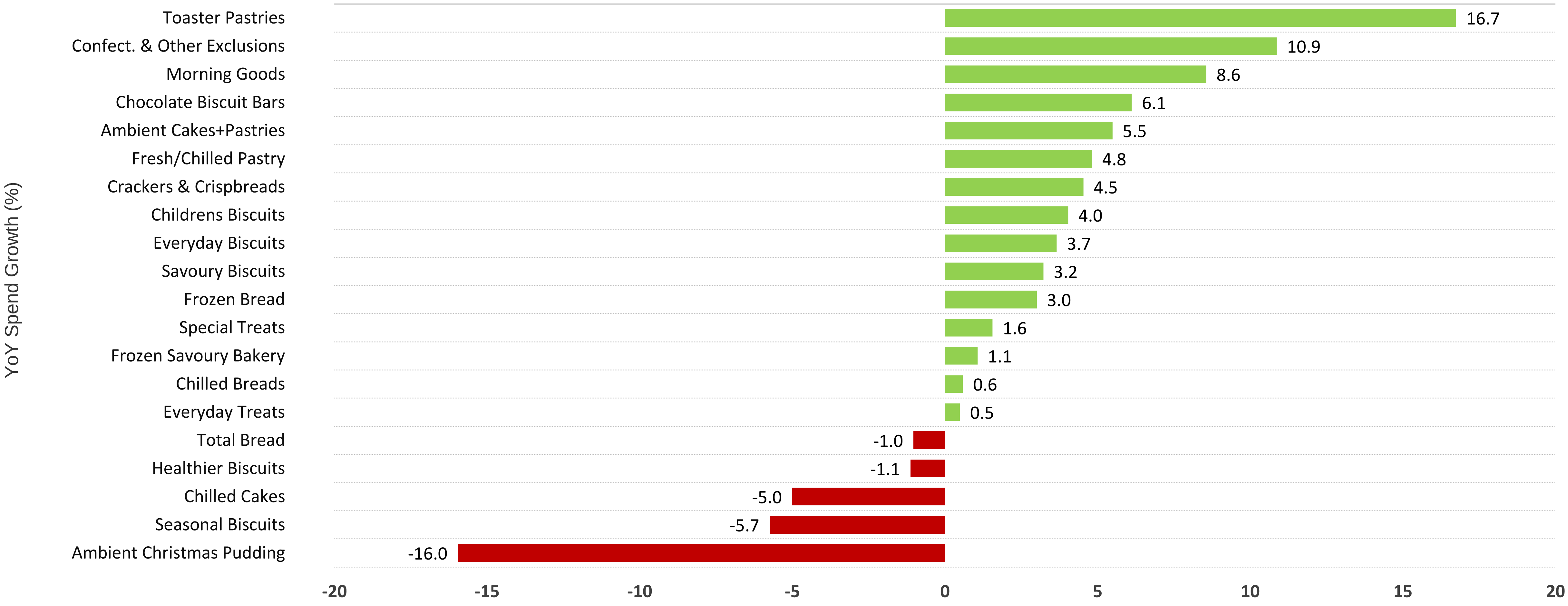
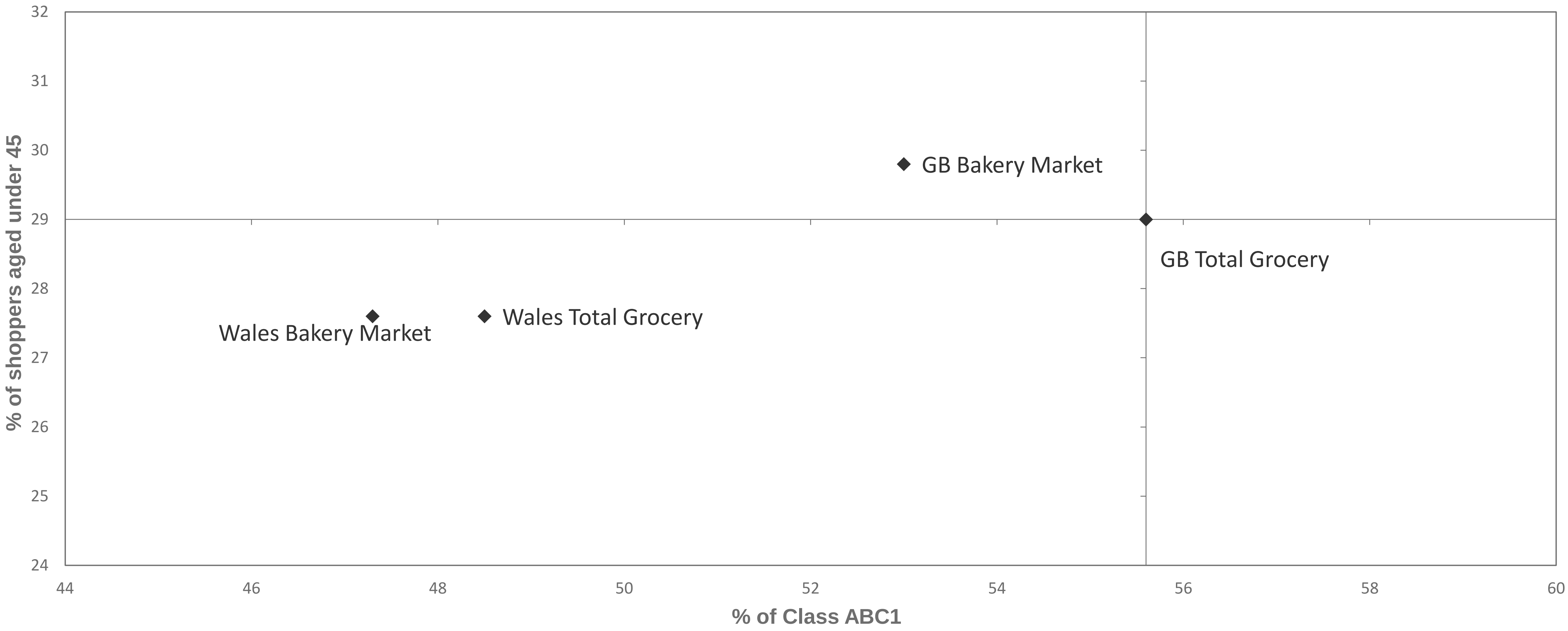
# Toaster Pastries is the fastest growing sector at 30.3%, growing significantly stronger than the Welsh Bakery market at 1.2% and the GB Bakery market at 3.5%. Seasonal biscuits and Ambient Christmas Pudding were the two worst performing sectors.



# Toaster Pastries are also the fastest growing sector at Total GB level, growing at 16.7%, although slightly slower than that of in Wales. The two strongest declining sectors are the same across GB as within Wales.



# Welsh Bakery shoppers are of a lower affluence than Welsh Grocery. This is a pattern seen at a GB level too.



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# Total Cereal, Grains and Pulses

## 52we 29 December 2019

Welsh Government

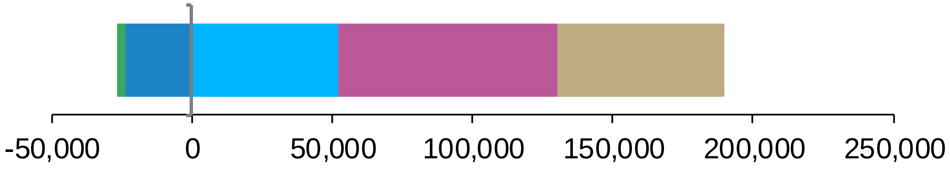
January 2020

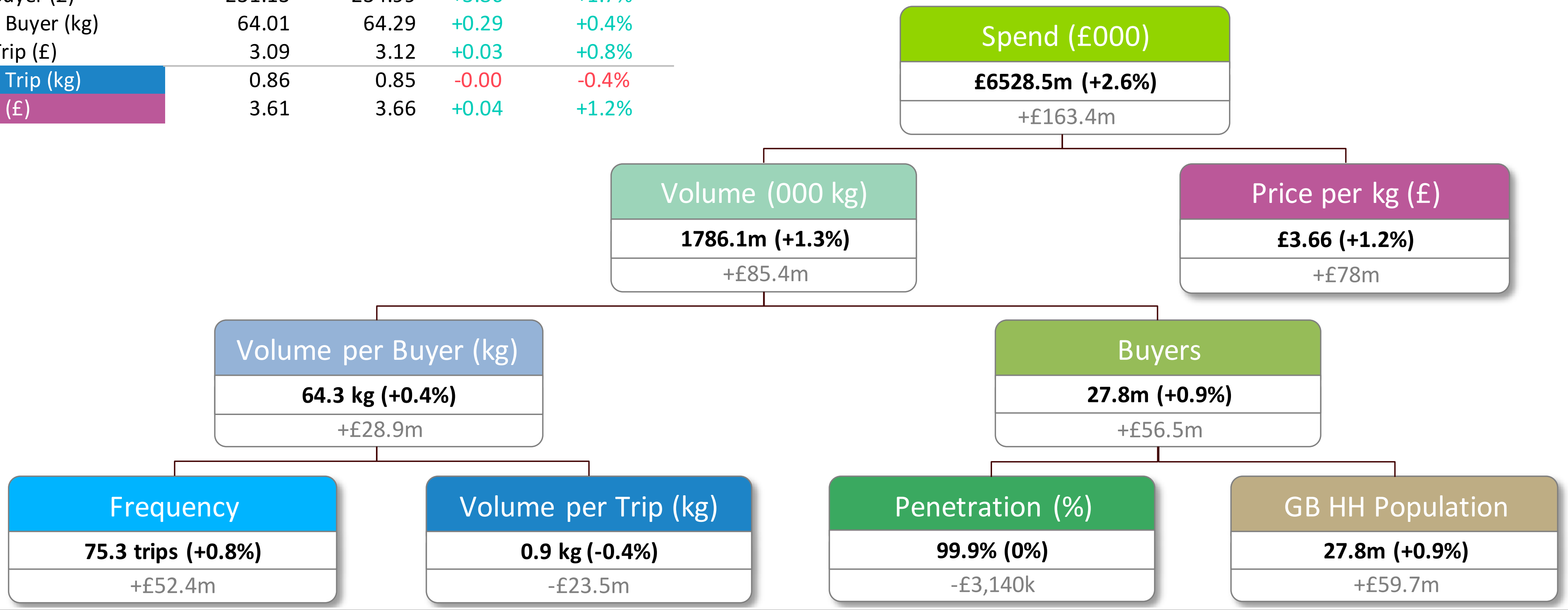
Kantar, Worldpanel Division

# The GB Cereals, Grains and Pulses Market is growing at 2.6%, despite shoppers purchasing less per trip. Growth is driven by shoppers more frequently purchasing and increases in price.

| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 6,365,094 | 6,528,475 | +163,381 | +2.6% |
| Volume (000 kg) | 1,762,620 | 1,786,098 | +23,478 | +1.3% |
| Penetration (%) | 99.92 | 99.87 | -0.05 | -0.0% |
| Frequency | 74.72 | 75.33 | +0.61 | +0.8% |
| Spend per Buyer (£) | 231.13 | 234.99 | +3.86 | +1.7% |
| Volume per Buyer (kg) | 64.01 | 64.29 | +0.29 | +0.4% |
| Spend per Trip (£) | 3.09 | 3.12 | +0.03 | +0.8% |
| Volume per Trip (kg) | 0.86 | 0.85 | -0.00 | -0.4% |
| Price per kg (£) | 3.61 | 3.66 | +0.04 | +1.2% |

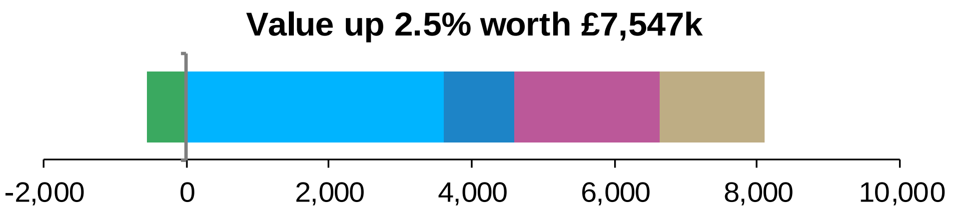
**Value up 2.6% worth £163.4m**



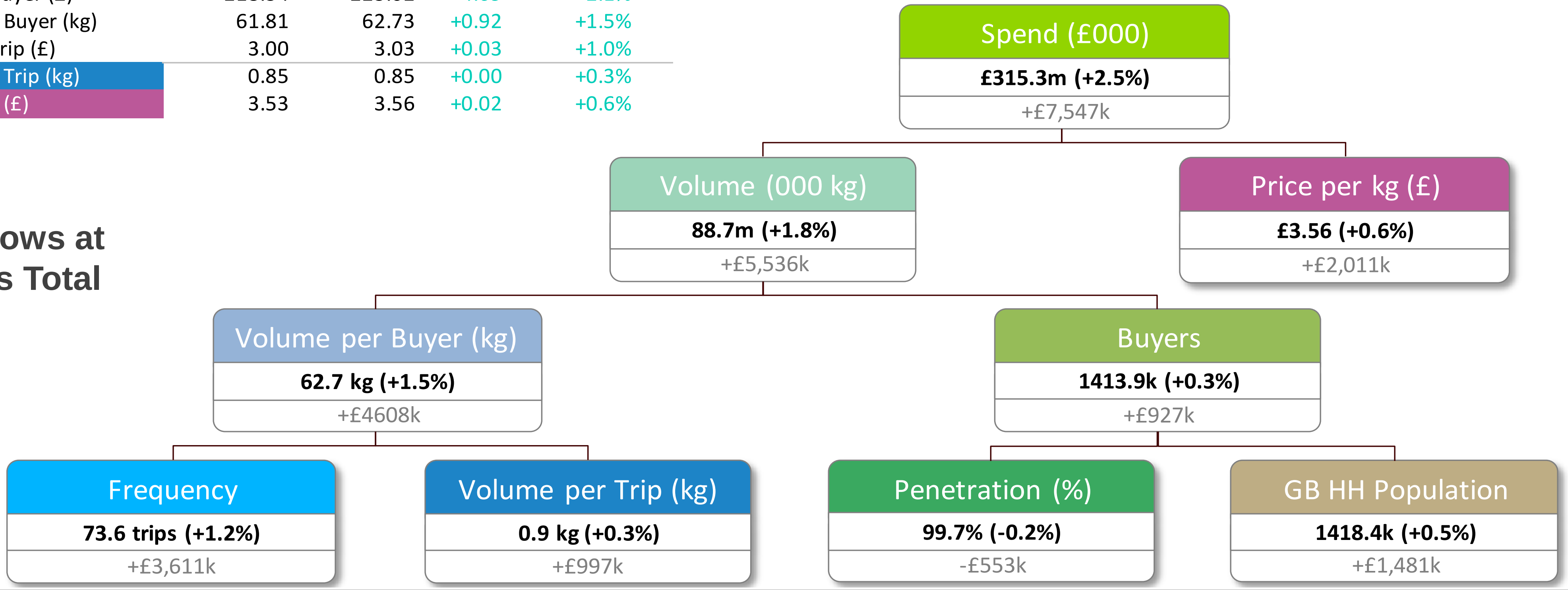



# The Welsh Market is growing at a similar rate to Total GB, with growth also being equated primarily to increases in frequency and price, although volume per trip is up in the region.

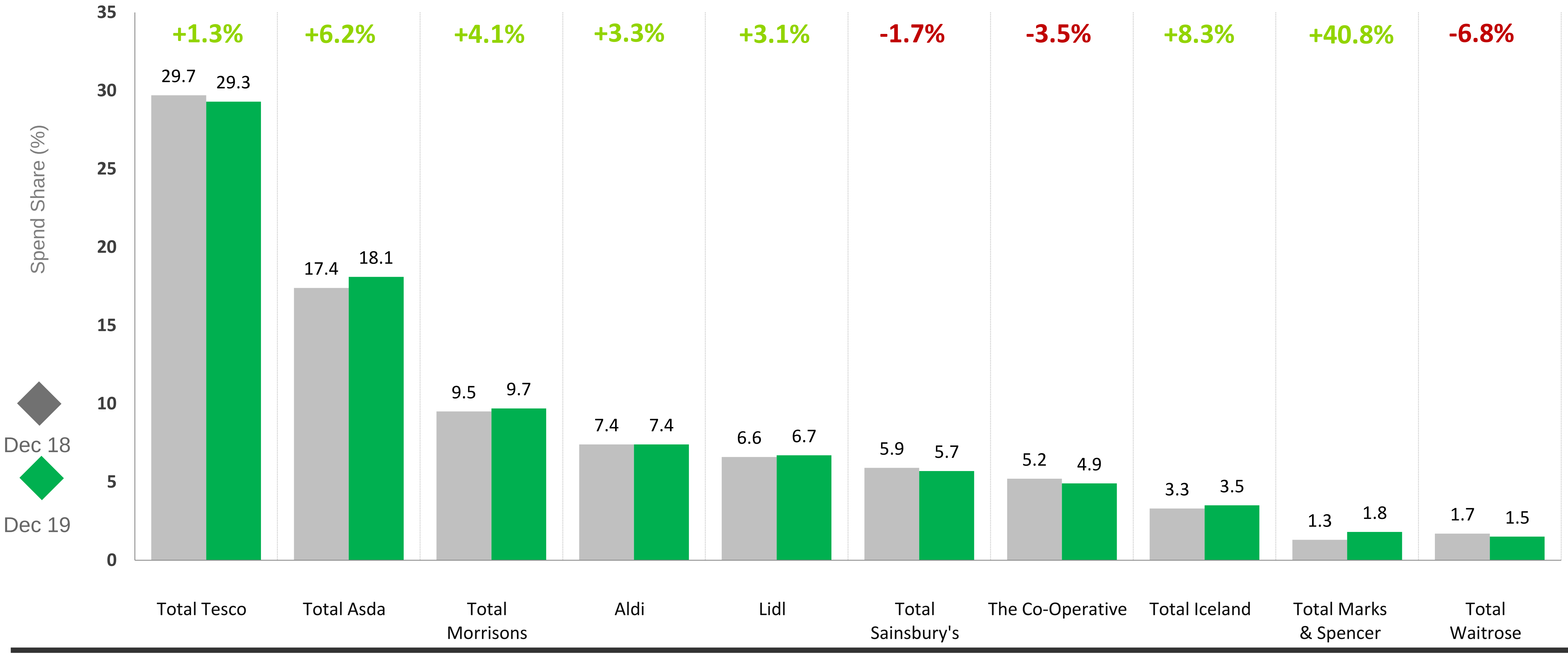
| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 307,791 | 315,338 | +7,547 | +2.5% |
| Volume (000 kg) | 87,135 | 88,697 | +1,562 | +1.8% |
| Penetration (%) | 99.87 | 99.69 | -0.18 | -0.2% |
| Frequency | 72.74 | 73.59 | +0.85 | +1.2% |
| Spend per Buyer (£) | 218.34 | 223.02 | +4.69 | +2.1% |
| Volume per Buyer (kg) | 61.81 | 62.73 | +0.92 | +1.5% |
| Spend per Trip (£) | 3.00 | 3.03 | +0.03 | +1.0% |
| Volume per Trip (kg) | 0.85 | 0.85 | +0.00 | +0.3% |
| Price per kg (£) | 3.53 | 3.56 | +0.02 | +0.6% |



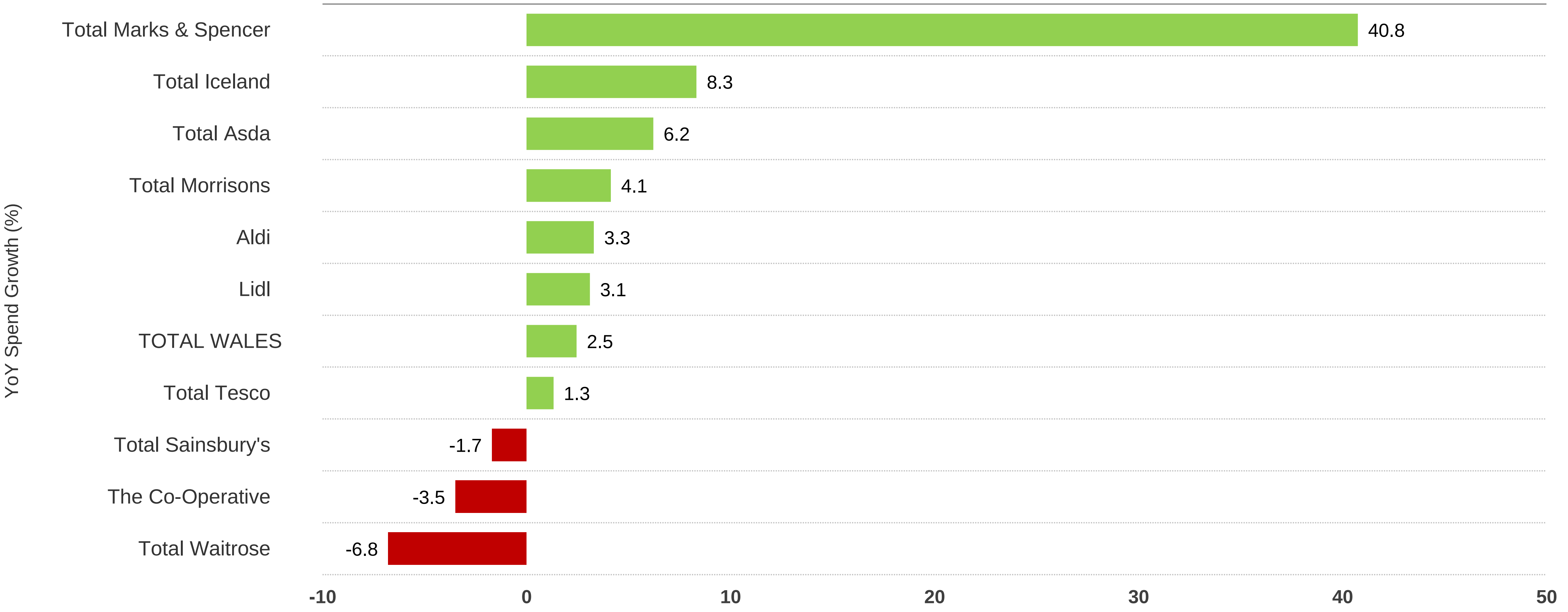

**Total CGS grows at +2.6% across Total GB.**



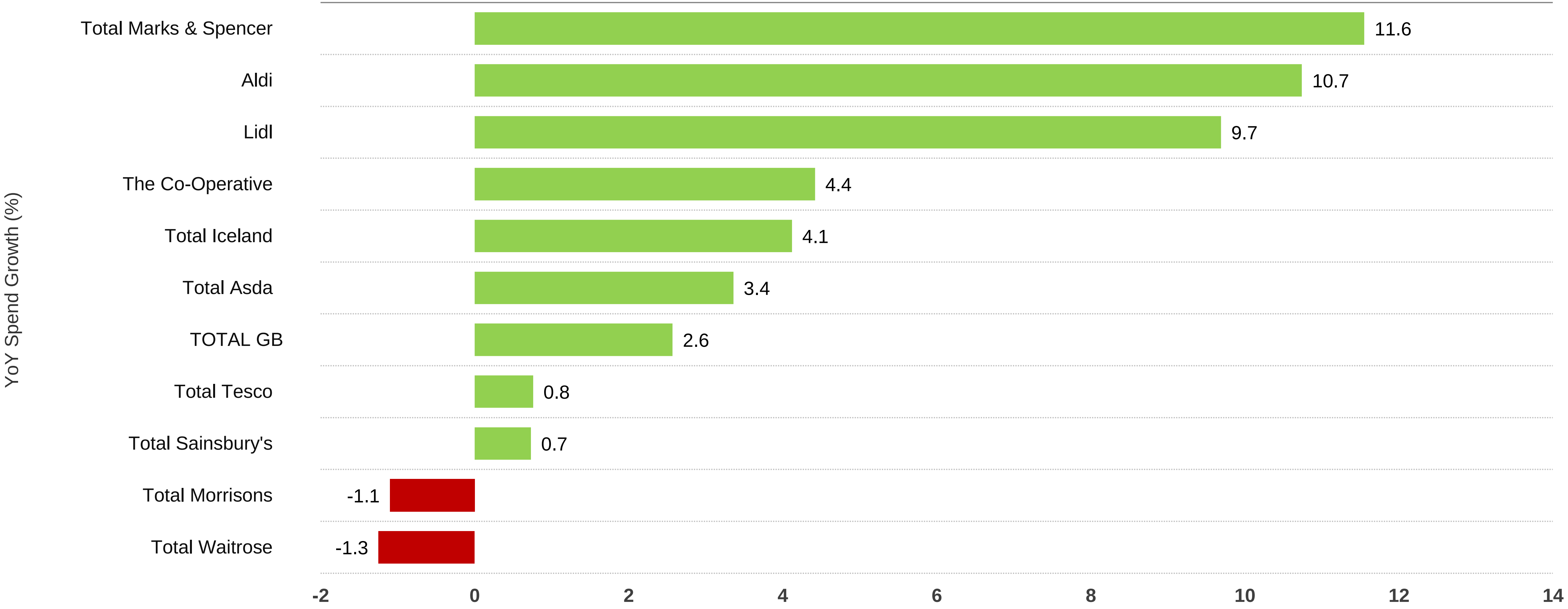
# M&S grew the most at +40.8%, increasing their share by 0.5ppts, albeit it off a small base but still notable.



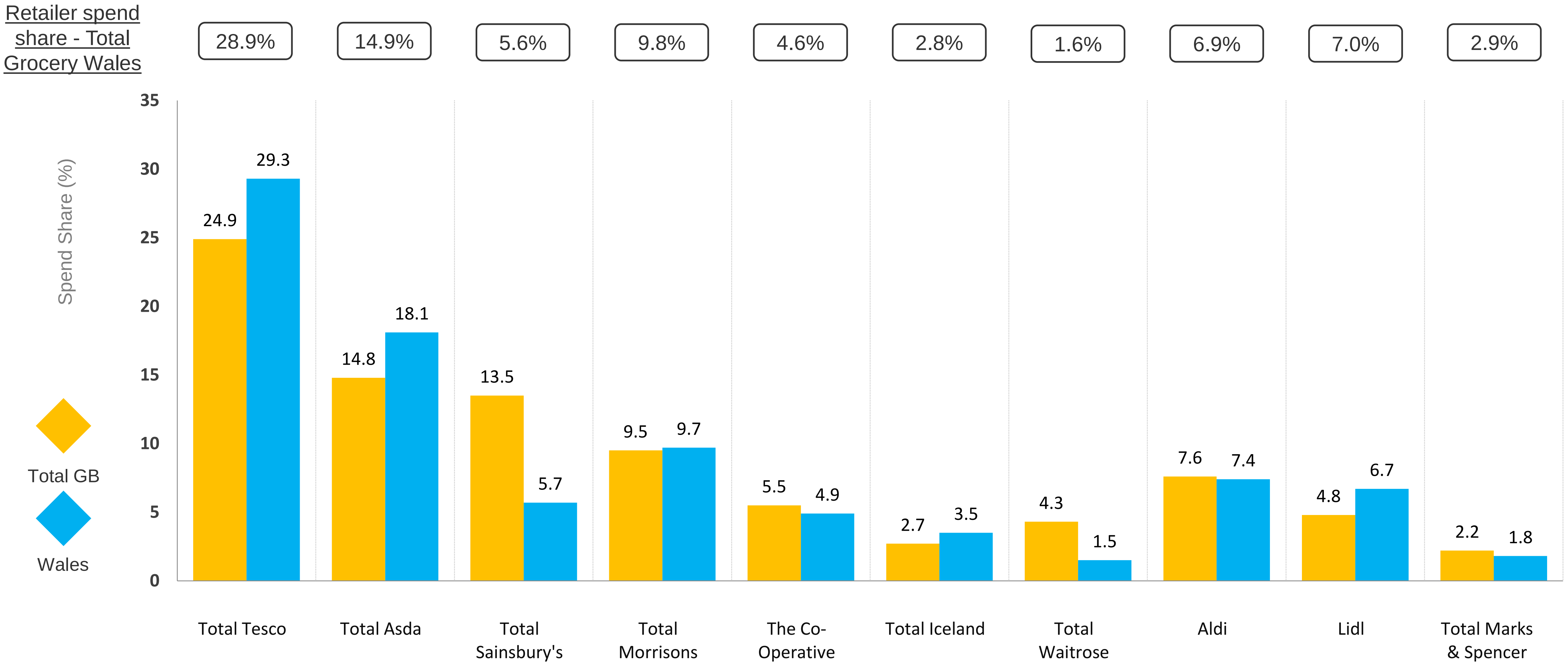
# Waitrose again saw decline, reflecting declines the retailer experiences at Grocery level across GB and Wales.



# At Total GB level, the picture differs to Wales as Sainsbury's and Coop experience growth but Morrison's declines.



# Despite the strong growth, M&S in Wales still undertrades versus both GB CGP and Wales Grocery – continued growth could help close this fair share gap. However, 6 of the 10 retailers do overtrade in CGP in Wales vs their share in Wales Grocery.

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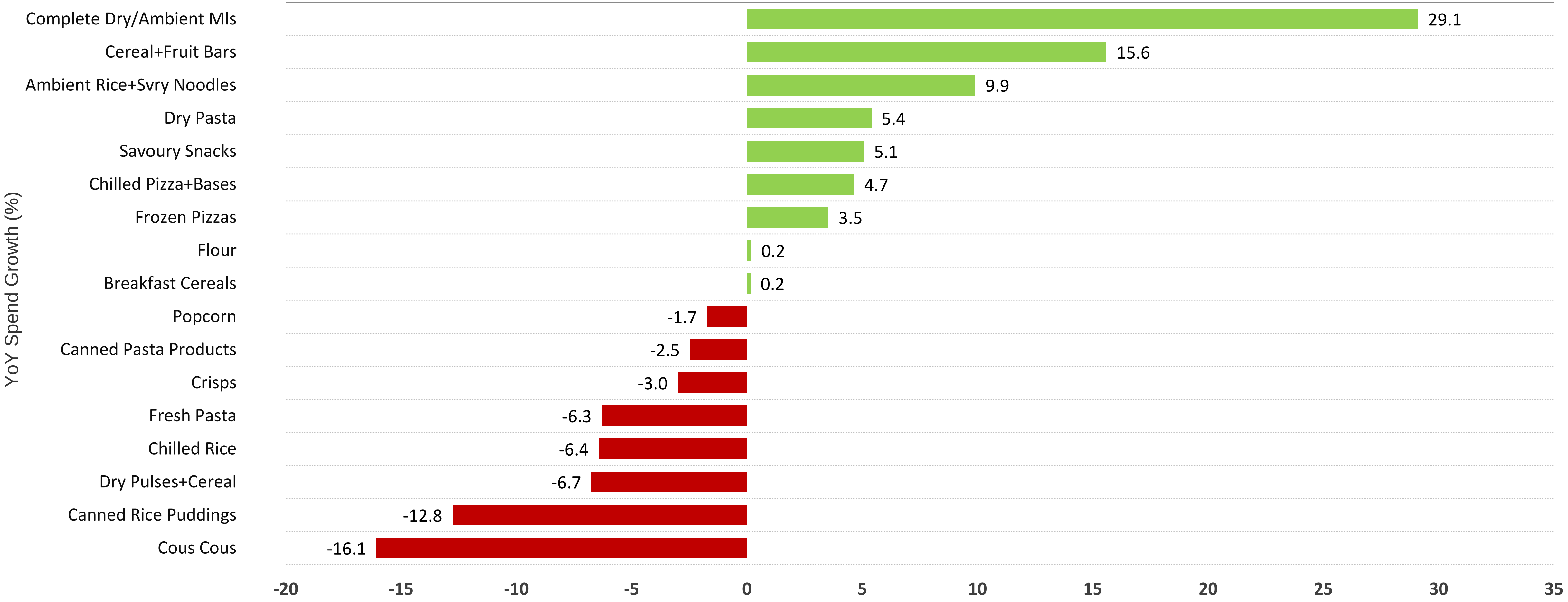
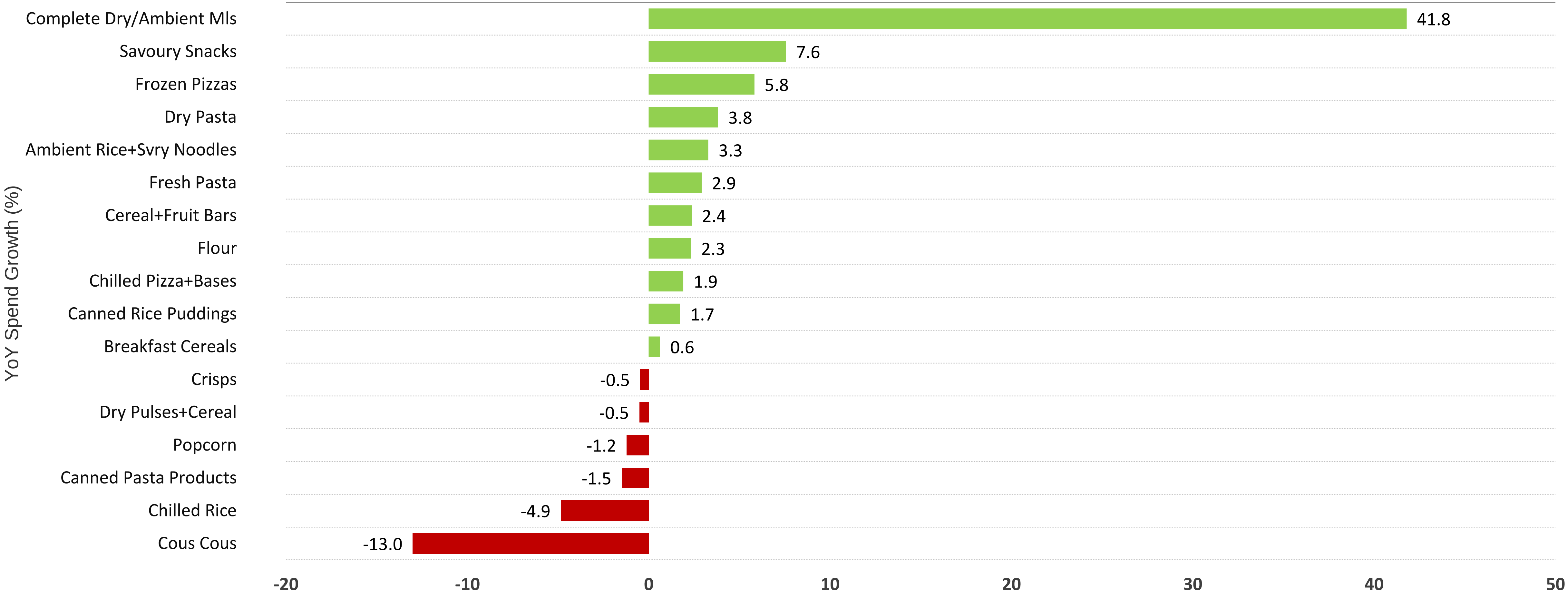
# Complete Dry/Ambient Meals saw the greatest growth at +29%, whilst Cous Cous was the worst performer declining 16.1%.



# There is stronger growth across Total GB with a greater amount of sectors seeing growth. Complete Dry/Ambient Meals again saw the greatest growth but more significantly so here than at Welsh level.

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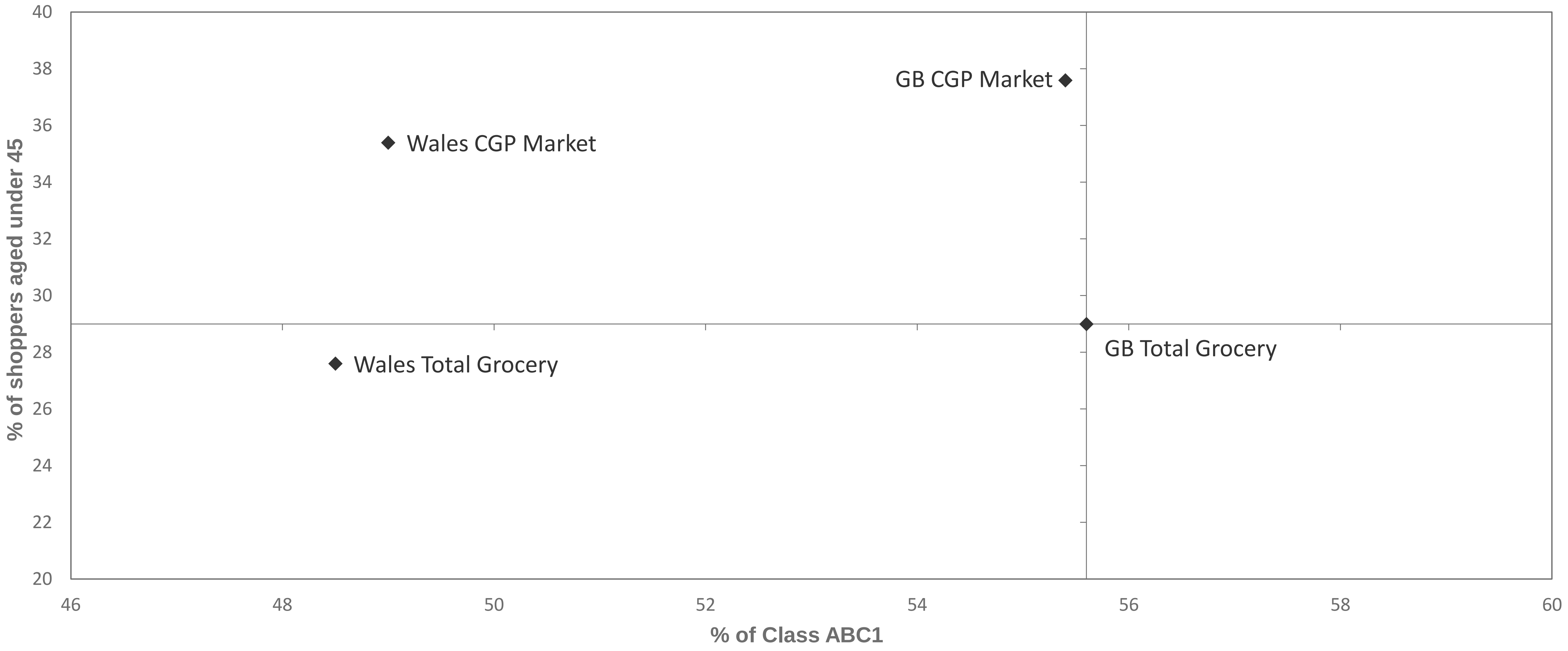
# Cereals, Grains and Pulses are bought by significantly younger shoppers than Total GB Grocery and Welsh Grocery.



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# Total Fruit and Vegetables

## 52we 29 December 2019

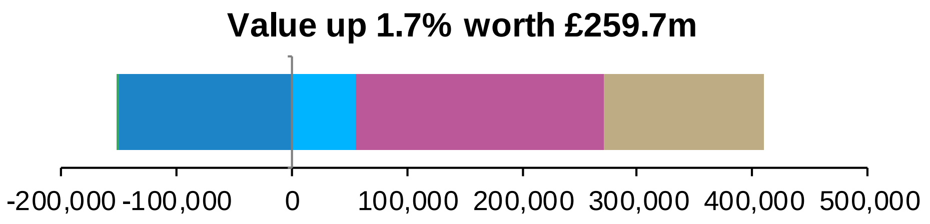
## Welsh Government

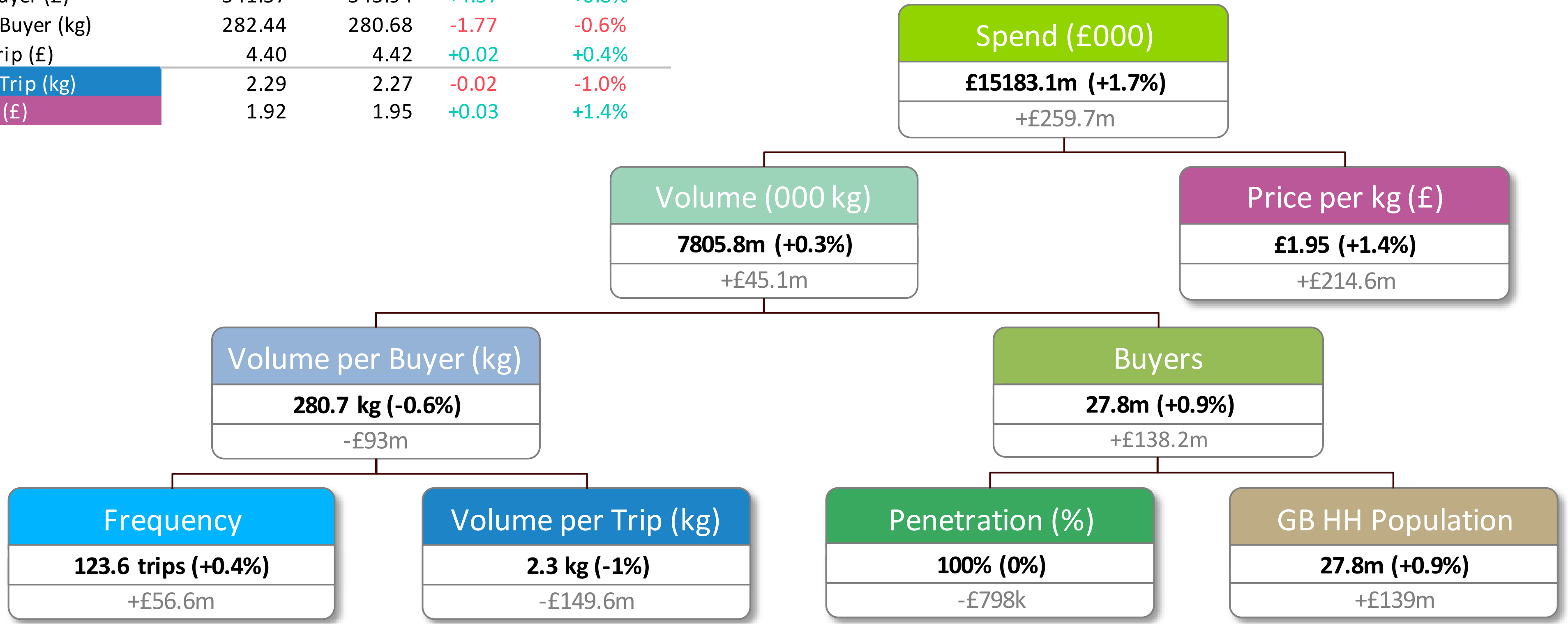
January 2020

Kantar, Worldpanel Division

# The GB Fruit and Vegetable market is growing at 1.7%, despite basket sizes decreasing. An increase in average pricing and population growth has driven overall growth.

| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 14,923,370 | 15,183,080 | +259,710 | +1.7% |
| Volume (000 kg) | 7,782,783 | 7,805,813 | +23,030 | +0.3% |
| Penetration (%) | 99.98 | 99.98 | -0.01 | -0.0% |
| Frequency | 123.11 | 123.58 | +0.47 | +0.4% |
| Spend per Buyer (£) | 541.57 | 545.94 | +4.37 | +0.8% |
| Volume per Buyer (kg) | 282.44 | 280.68 | -1.77 | -0.6% |
| Spend per Trip (£) | 4.40 | 4.42 | +0.02 | +0.4% |
| Volume per Trip (kg) | 2.29 | 2.27 | -0.02 | -1.0% |
| Price per kg (£) | 1.92 | 1.95 | +0.03 | +1.4% |

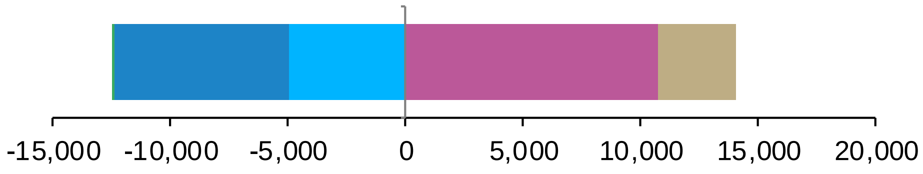


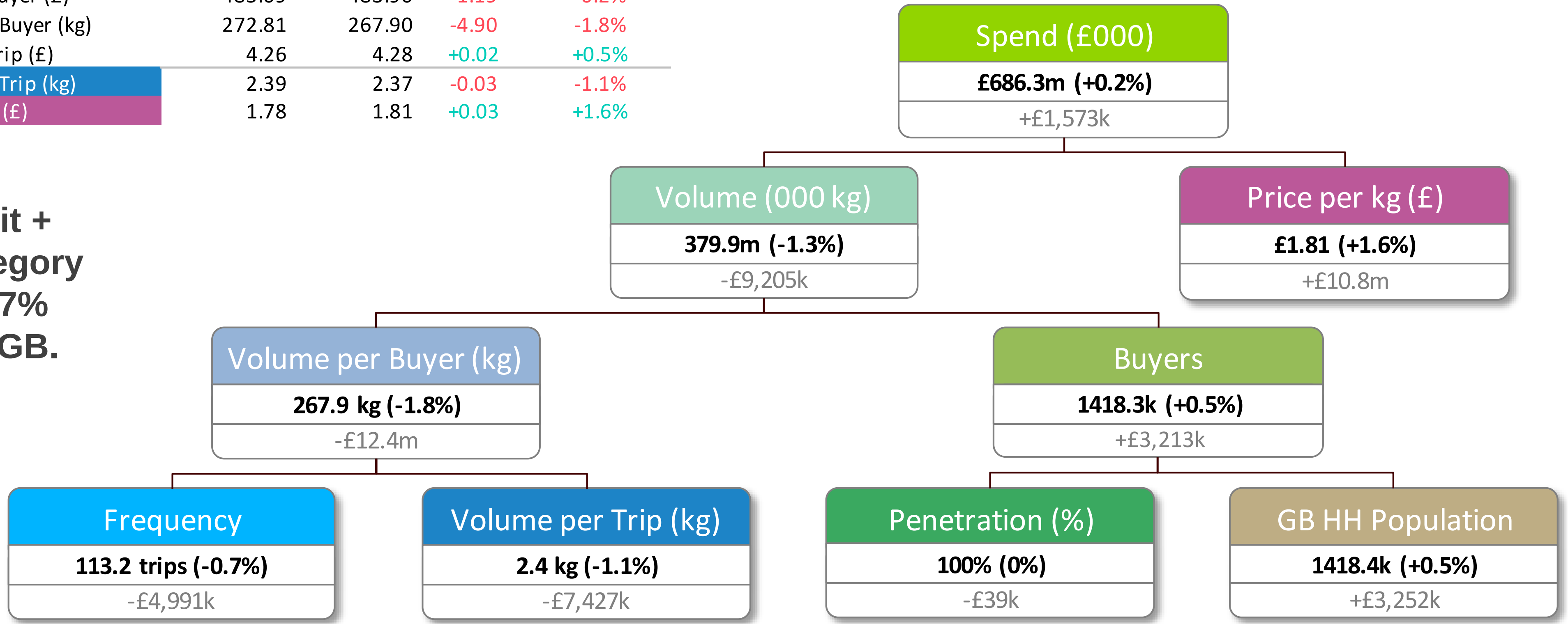
# Wales is growing slower than the Total GB market at 0.2% - the difference as a result of a decline in frequency that isn't seen across GB.

| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 684,709 | 686,282 | +1,573 | +0.2% |
| Volume (000 kg) | 385,066 | 379,944 | -5,122 | -1.3% |
| Penetration (%) | 100.00 | 99.99 | -0.01 | -0.0% |
| Frequency | 113.99 | 113.16 | -0.83 | -0.7% |
| Spend per Buyer (£) | 485.09 | 483.90 | -1.19 | -0.2% |
| Volume per Buyer (kg) | 272.81 | 267.90 | -4.90 | -1.8% |
| Spend per Trip (£) | 4.26 | 4.28 | +0.02 | +0.5% |
| Volume per Trip (kg) | 2.39 | 2.37 | -0.03 | -1.1% |
| Price per kg (£) | 1.78 | 1.81 | +0.03 | +1.6% |

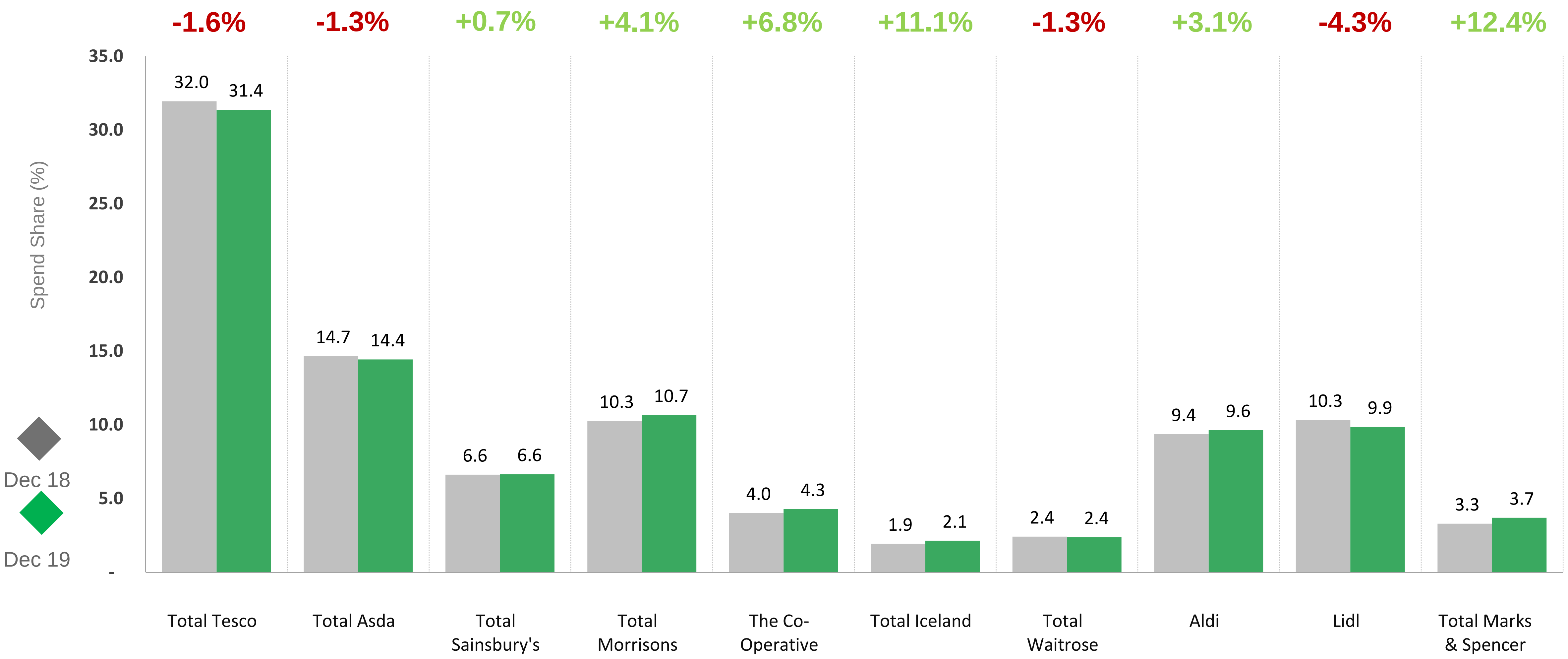
**Value up 0.2% worth £1,573k**




**Total GB Fruit + Vegetable Category grows at +1.7% across Total GB.**



# M&S and Morrisons have gained the most share, each up 0.4ppts. Iceland also shows double digit value growth taking their share up to 2.1%.

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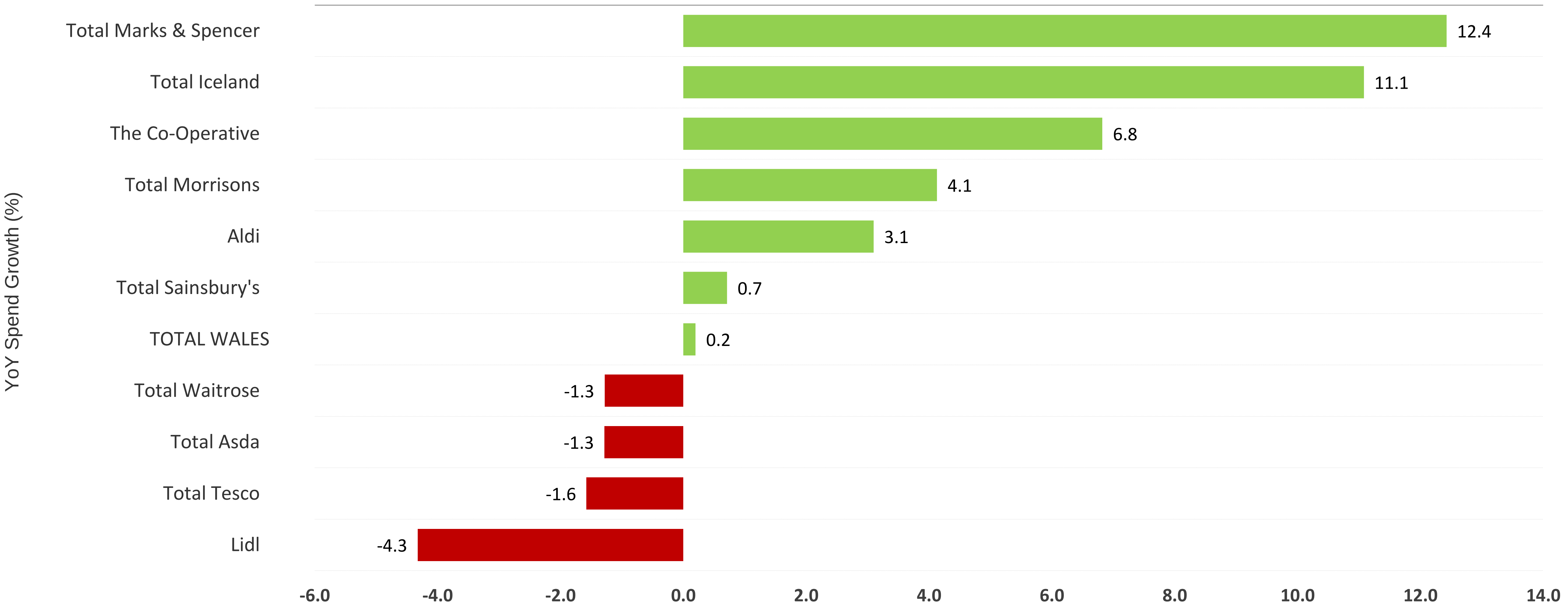
# For the second year running M&S is the strongest growing retailer in Wales (+12.4%), whereas Lidl has seen the strongest decline of -4.3%.

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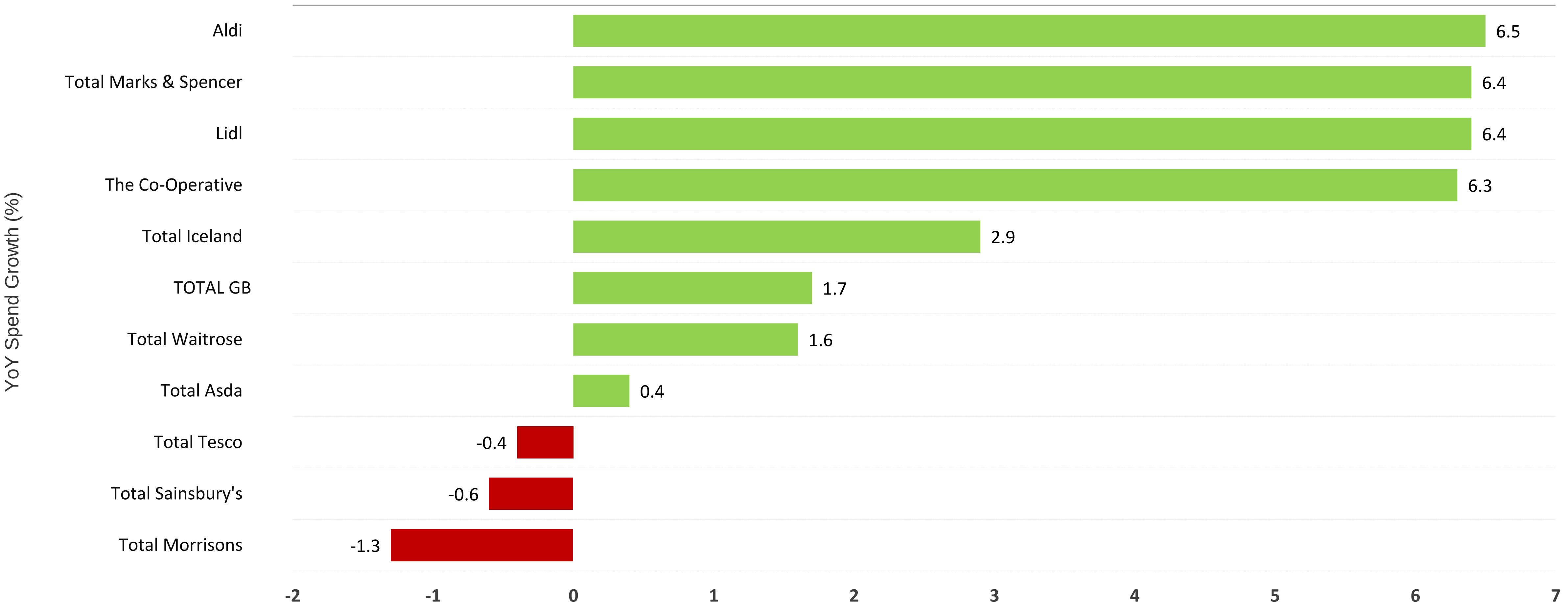
# At Total GB level M&S remains in good growth (+6.4%), both Aldi & Lidl have outperformed their respective performances in Wales and only Morrisons has seen a decline of over 1%.

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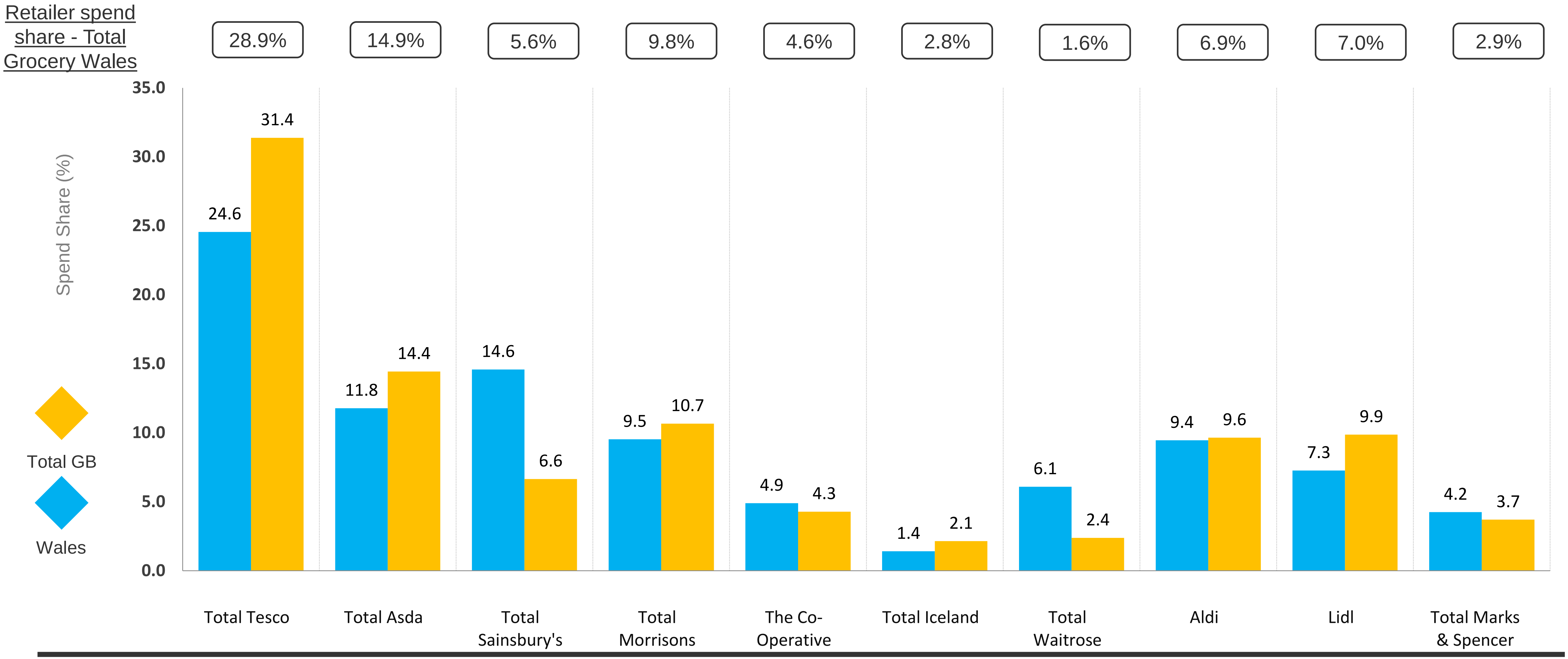
# Aldi & Lidl overtrade versus the shares they hold within GB F&V as well as Wales Grocery. M&S overtrades versus Wales Grocery but not against GB F&V, posing an opportunity.

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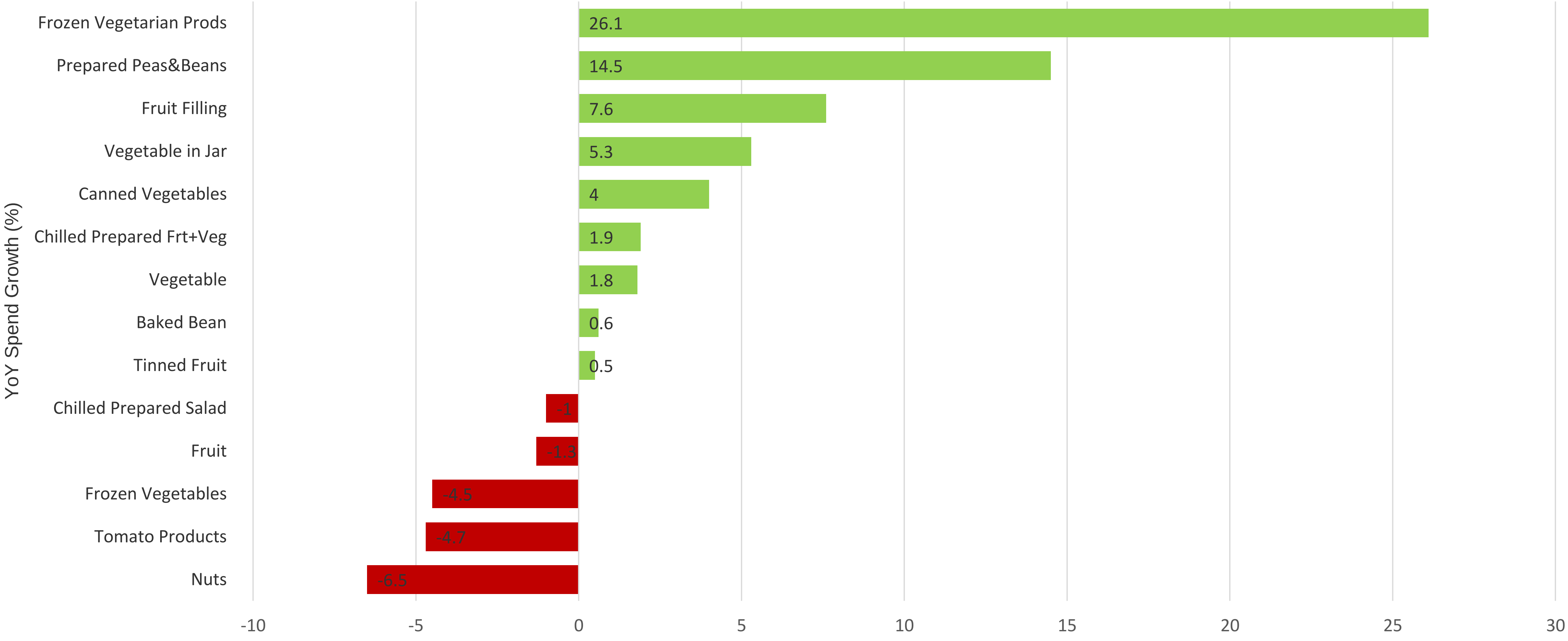
# Frozen Vegetarian products have continued to grow well for the second year running in Wales. Nuts however have fallen into a 6.5% decline having grown 3.2% the previous year

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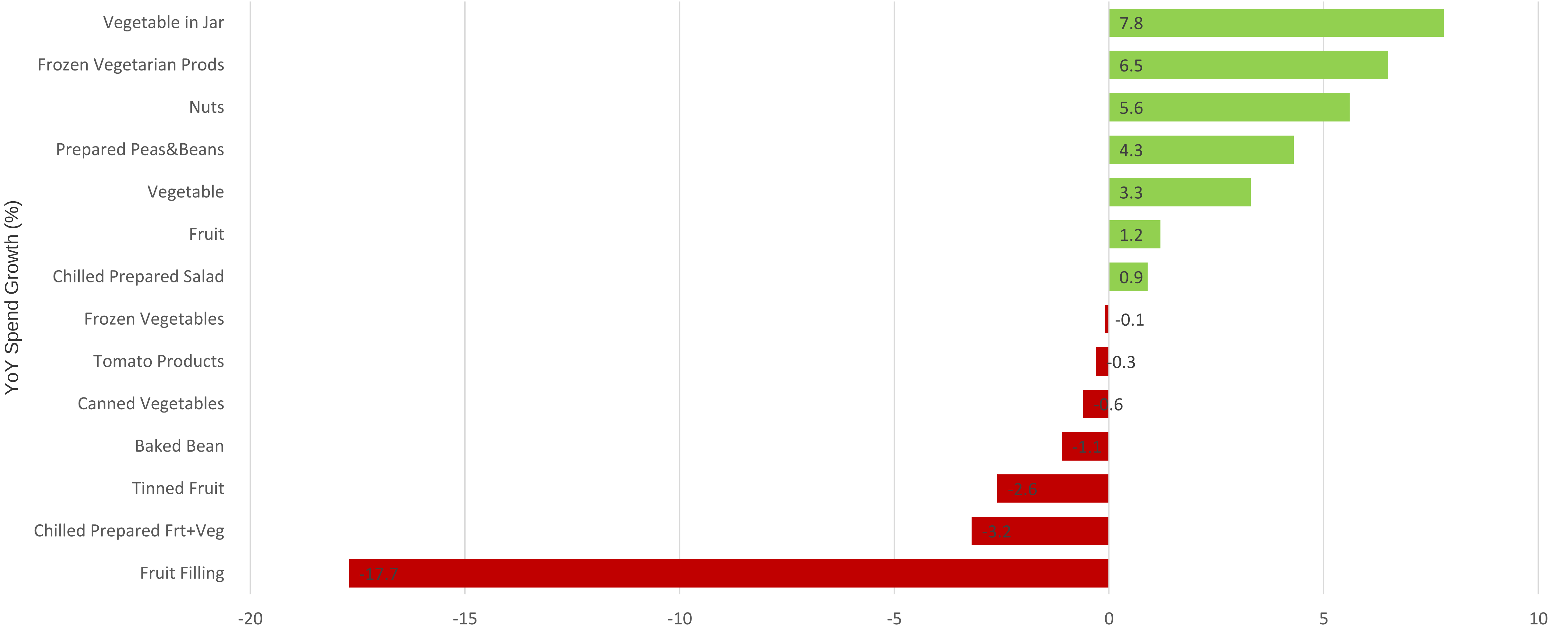
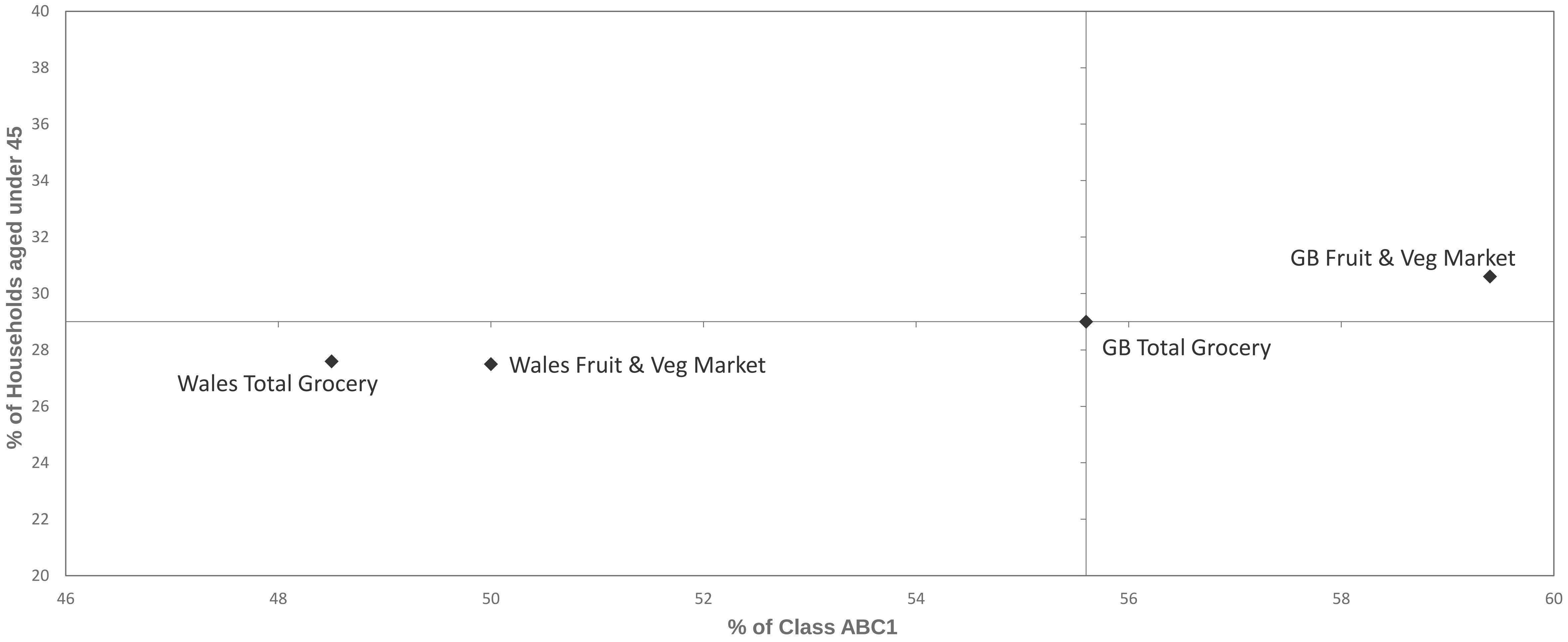
# At Total GB level, the biggest difference versus Wales is Fruit Fillings, having seen significant decline but remain the smallest sector. In addition, Nuts grow across GB, but are -6.5% decline in Wales.



# Shoppers buying Fruit and Vegetables tend to be more affluent than the Grocery shopper in both GB and Wales. In the case of GB, Fruit and Veg shoppers are also slightly younger.

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# Total Meat and Meat Products

## 52we 29 December 2019

**Welsh Government**

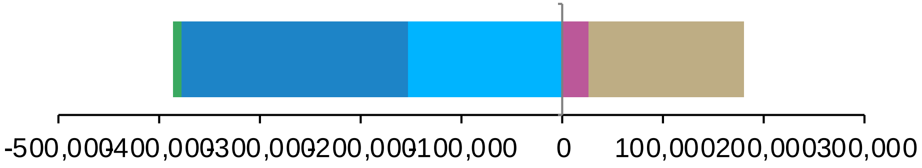
**January 2020**

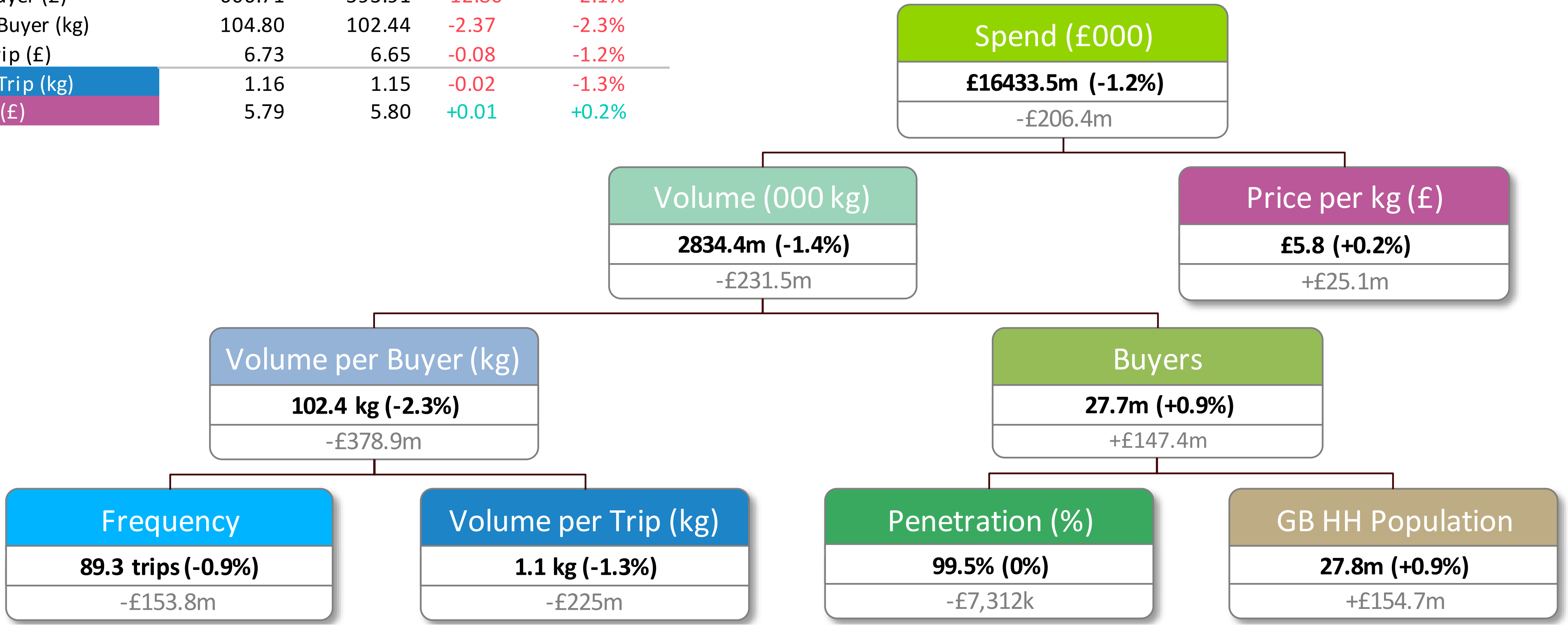
**Kantar, Worldpanel Division**

# The GB Meat market has declined, driven by shoppers buying less volume, less often.

| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 16,639,880 | 16,433,480 | -206,400 | -1.2% |
| Volume (000 kg) | 2,874,321 | 2,834,378 | -39,943 | -1.4% |
| Penetration (%) | 99.52 | 99.47 | -0.04 | -0.0% |
| Frequency | 90.16 | 89.33 | -0.83 | -0.9% |
| Spend per Buyer (£) | 606.71 | 593.91 | -12.80 | -2.1% |
| Volume per Buyer (kg) | 104.80 | 102.44 | -2.37 | -2.3% |
| Spend per Trip (£) | 6.73 | 6.65 | -0.08 | -1.2% |
| Volume per Trip (kg) | 1.16 | 1.15 | -0.02 | -1.3% |
| Price per kg (£) | 5.79 | 5.80 | +0.01 | +0.2% |

**Value down 1.2% worth £206.4m**

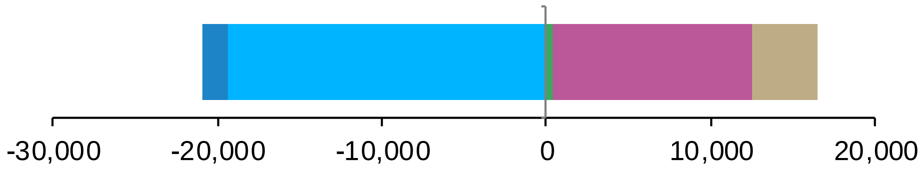


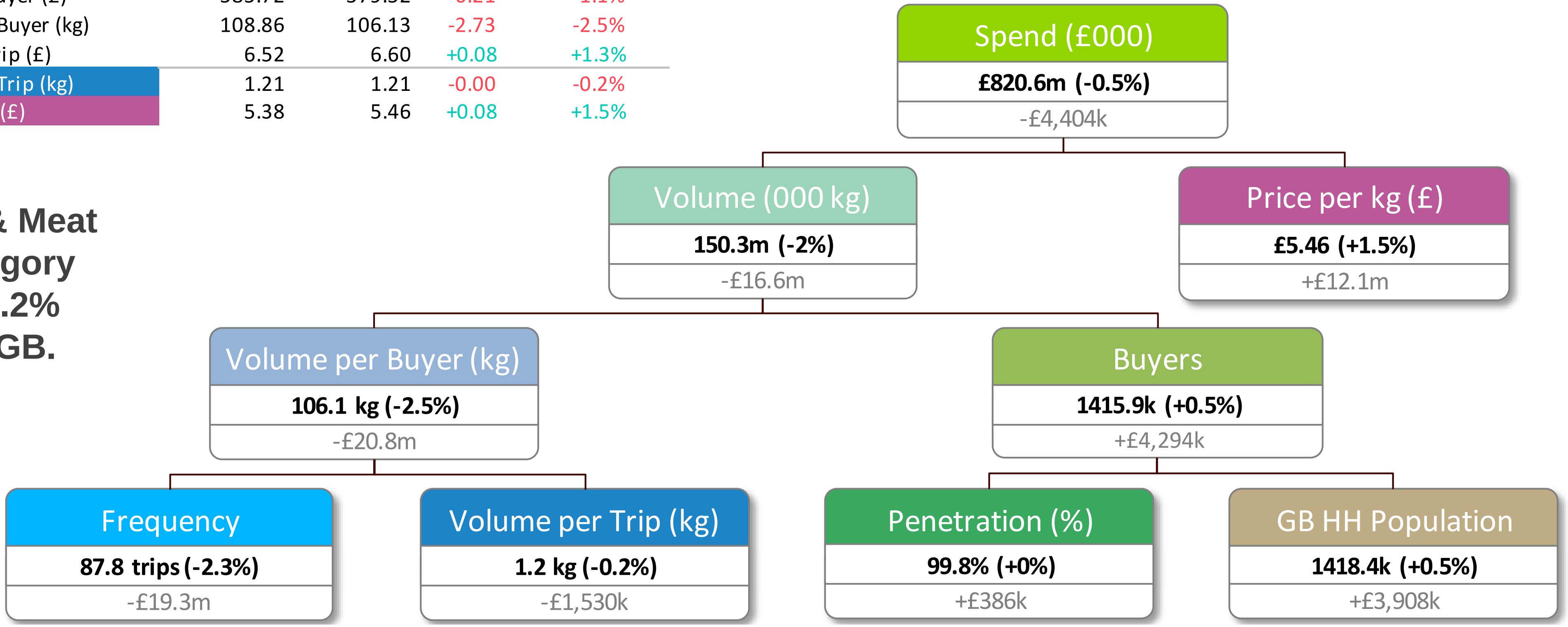
# Within Wales the Meat market is declining but at a slower rate than GB. However, the decline in frequency is stronger but higher price growth than GB boosts the marker in Wales.

| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 824,955 | 820,551 | -4,404 | -0.5% |
| Volume (000 kg) | 153,323 | 150,275 | -3,048 | -2.0% |
| Penetration (%) | 99.78 | 99.83 | +0.05 | +0.0% |
| Frequency | 89.90 | 87.81 | -2.09 | -2.3% |
| Spend per Buyer (£) | 585.72 | 579.52 | -6.21 | -1.1% |
| Volume per Buyer (kg) | 108.86 | 106.13 | -2.73 | -2.5% |
| Spend per Trip (£) | 6.52 | 6.60 | +0.08 | +1.3% |
| Volume per Trip (kg) | 1.21 | 1.21 | -0.00 | -0.2% |
| Price per kg (£) | 5.38 | 5.46 | +0.08 | +1.5% |

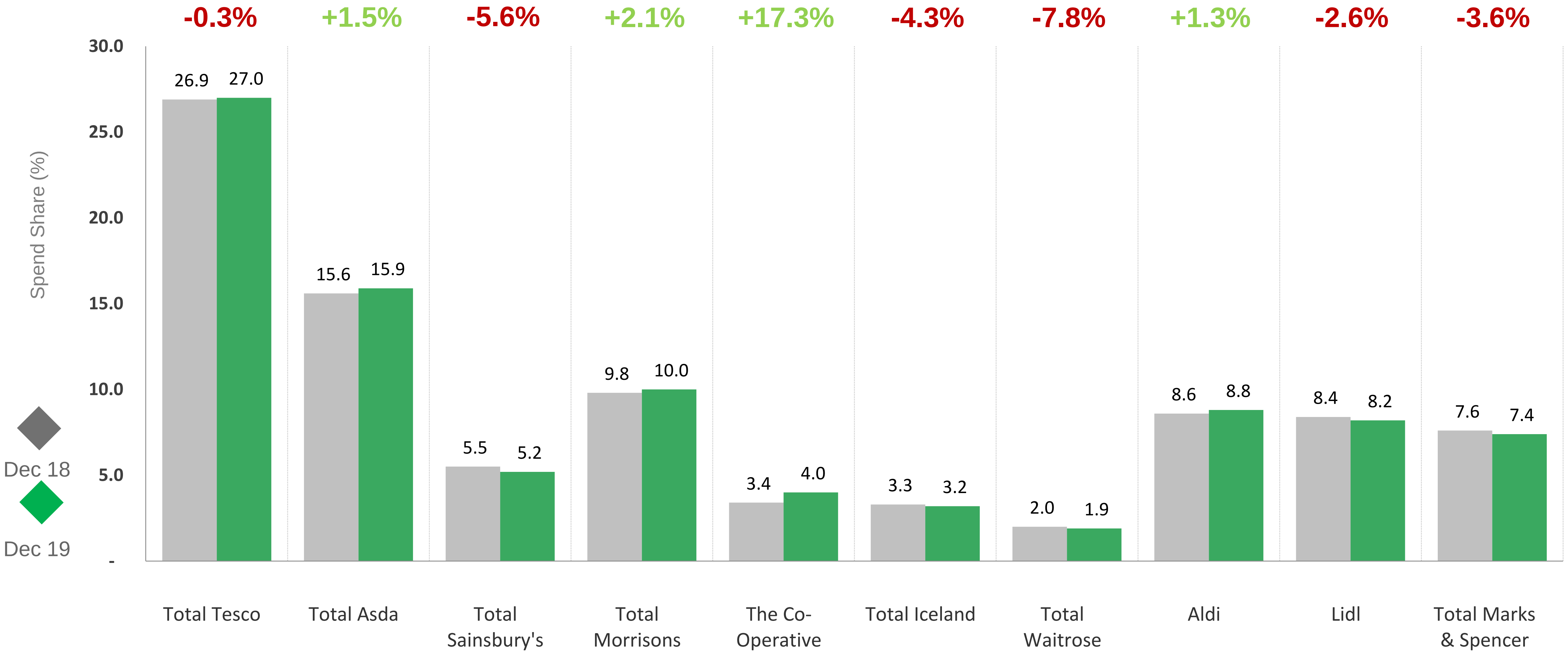
**Value down 0.5% worth £4,404k**



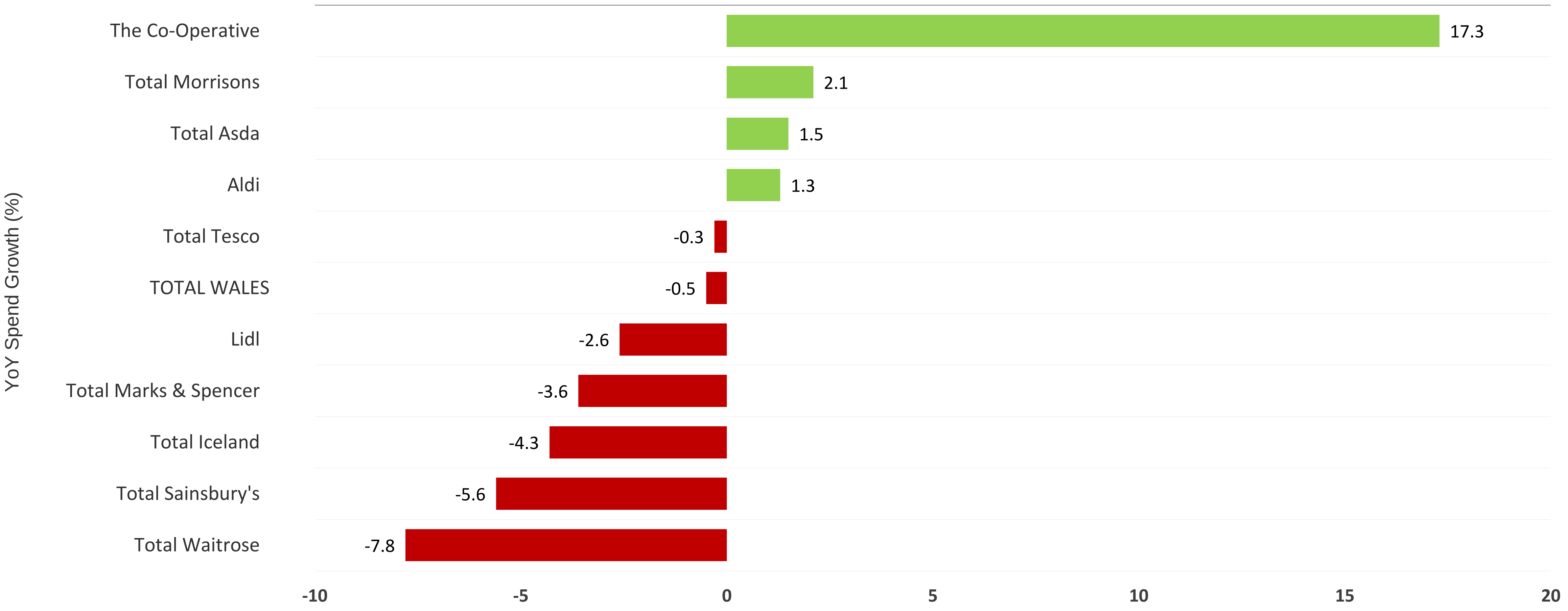

**Total GB Meat & Meat Products Category declines at -1.2% across Total GB.**



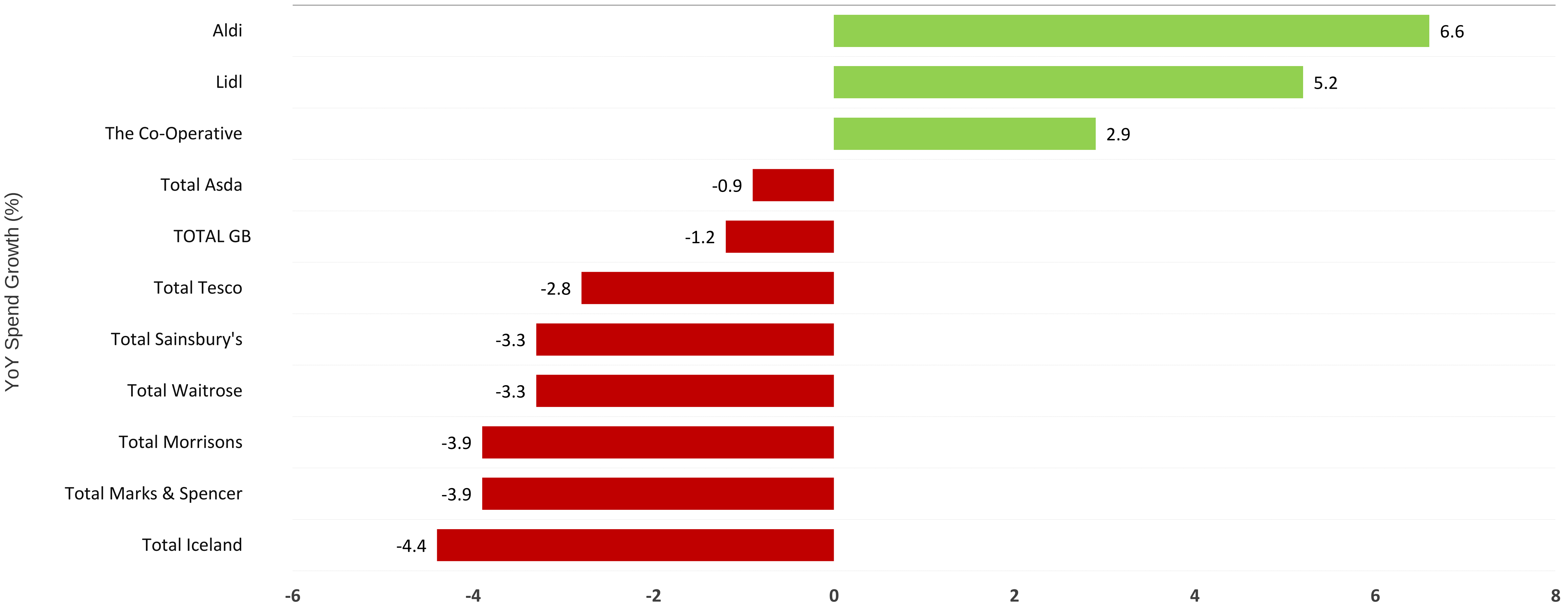
# The Co-Op are the only retailer to see double digit growth in Wales, gaining 0.6ppts in share. Sainsbury's have contributed to decline most significantly, dropping 0.3ppts in share.



# Sainsbury’s are the only Big 4 retailer to decline faster than both the Total GB and Wales Meat markets. Premium retailers, M&S and Waitrose are also in decline.



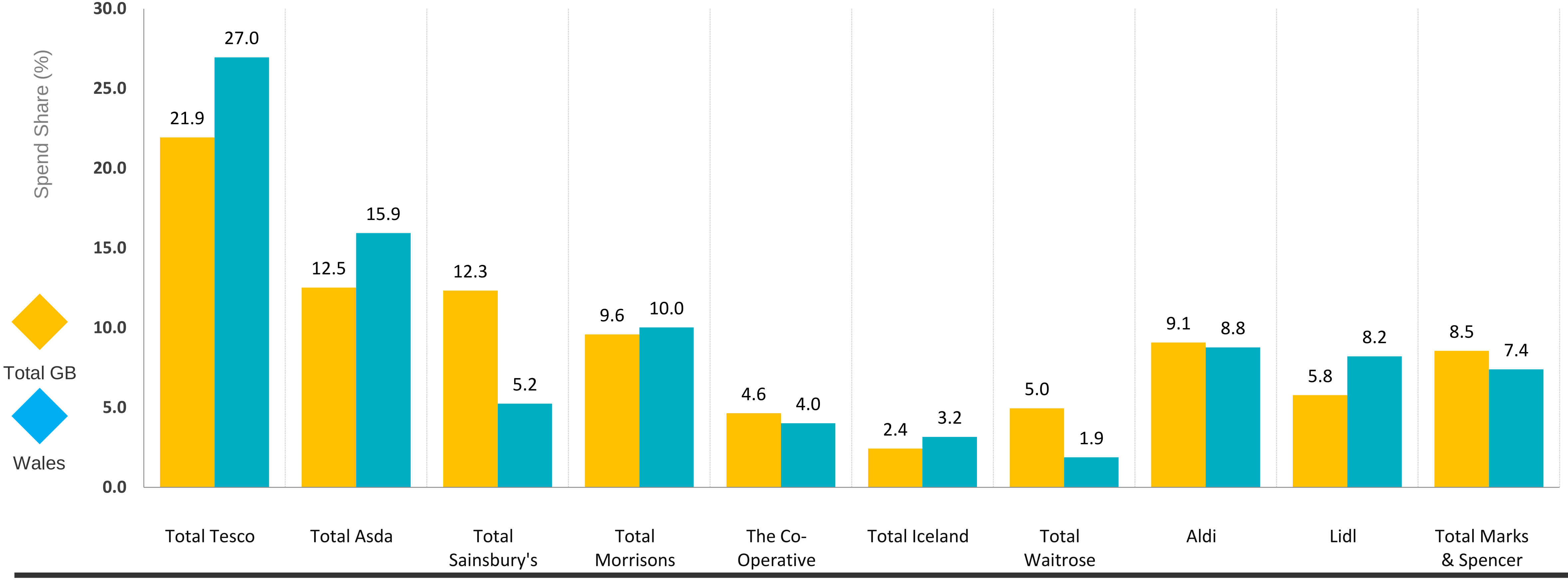
# This performance changes at a GB level as Aldi and Lidl are the strongest growing, the latter of which is in decline in Wales. Coop’s growth is not as strong across GB.



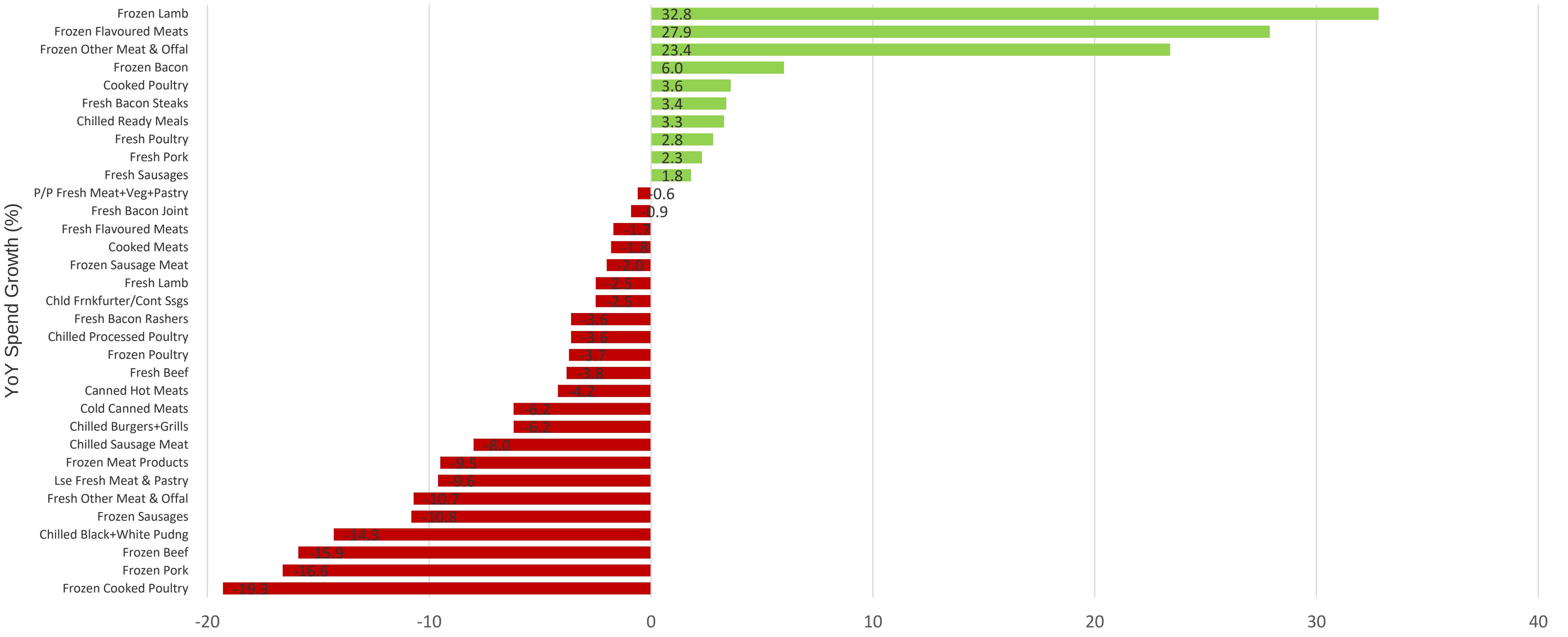
# …Coop should optimise this growth in Wales in order to achieve fair share vs both its share in GB Meat and Wales Grocery. Tesco is overtrading in Wales vs GB most significantly but still undertrades vs Wales Grocery share.

Retailer spend share - Total Grocery Wales

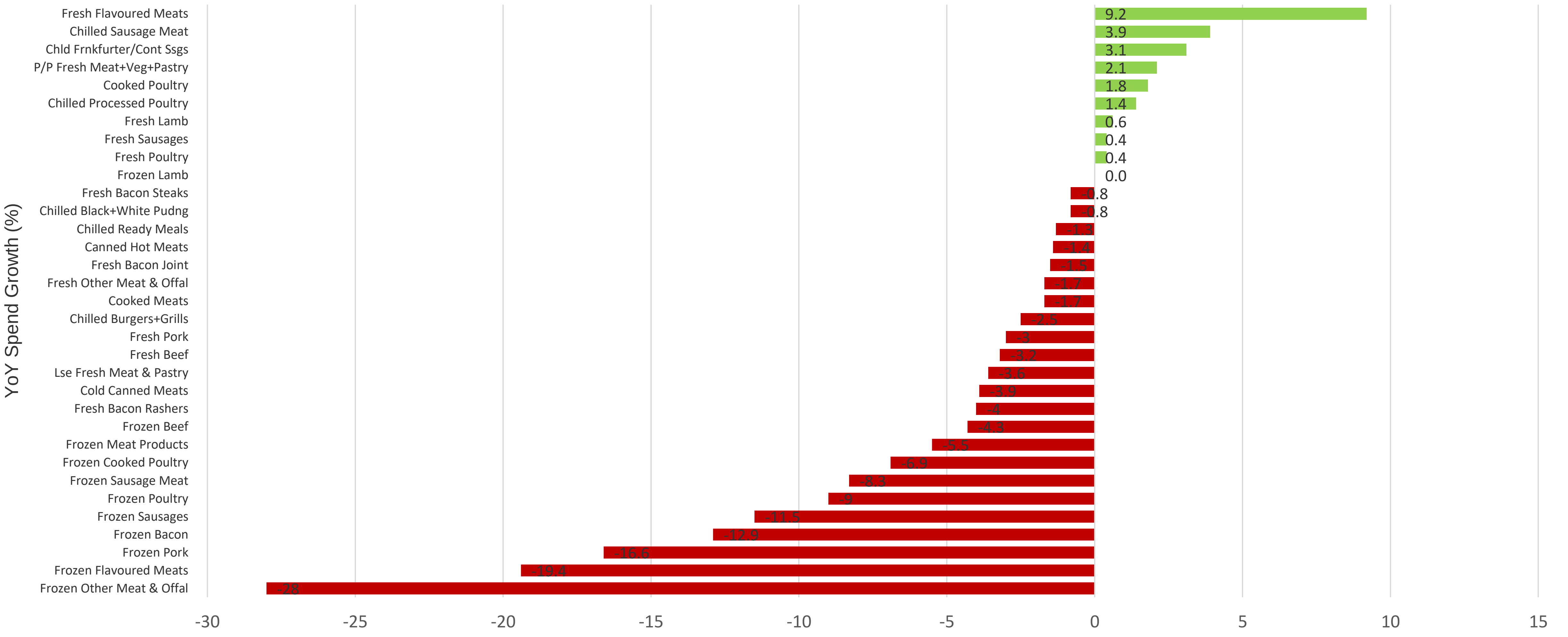
| Total Tesco | Total Asda | Total Sainsbury's | Total Morrisons | The Co-Operative | Total Iceland | Total Waitrose | Aldi | Lidl | Total Marks & Spencer |
|---|---|---|---|---|---|---|---|---|---|
| 28.9% | 14.9% | 5.6% | 9.8% | 4.6% | 2.8% | 1.6% | 6.9% | 7.0% | 2.9% |



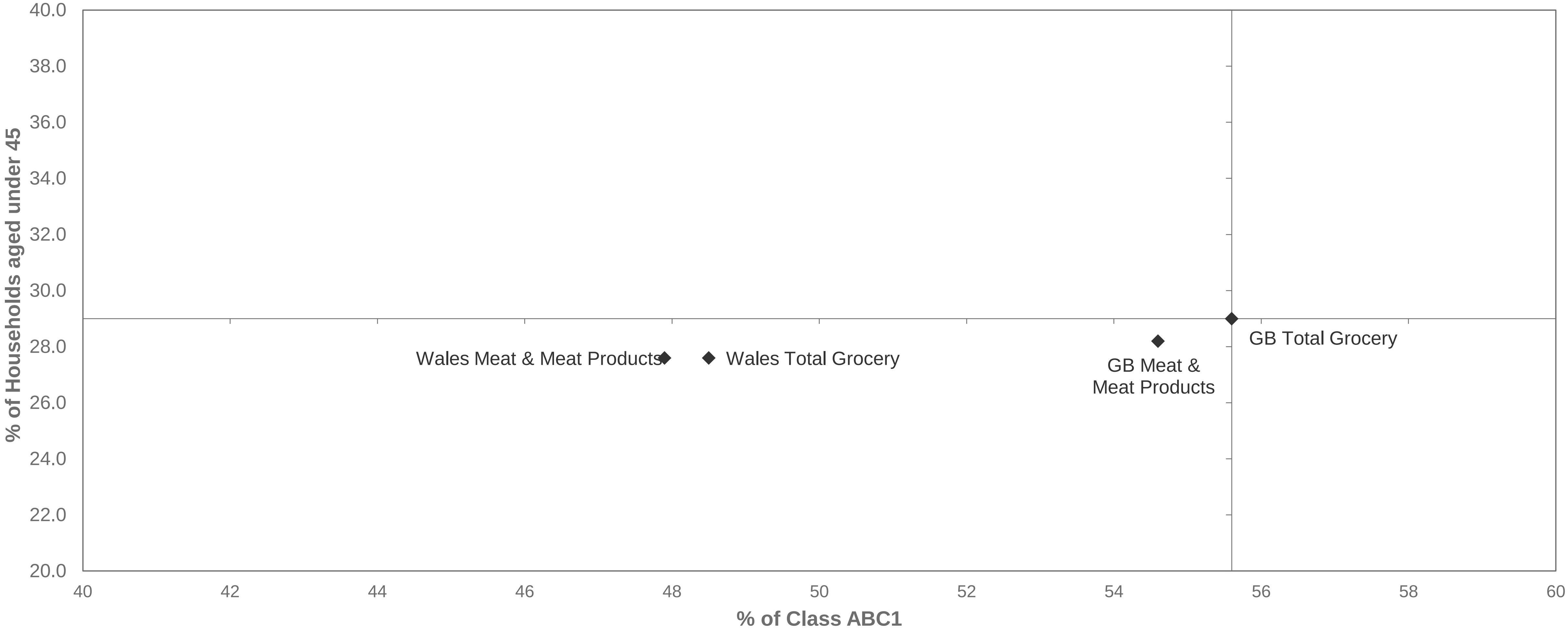
# Within Wales Frozen Lamb grew the strongest at 32.8%, in contrast Frozen Cooked Poultry saw the heaviest decline at -19.3%.



# At Total GB level Fresh Flavoured Meats grew the most at 9.2%, despite decline in Wales. Frozen Pork experienced a large drop of 16.6%, identical to the its decline in Wales.



# Both at GB and Wales views, the average Meat shopper is slightly less affluent than the typical Grocery shopper.  Age tends to stay very similar to that of grocery within each region.



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# Total Oils and Fats

## 52we 29 December 2019

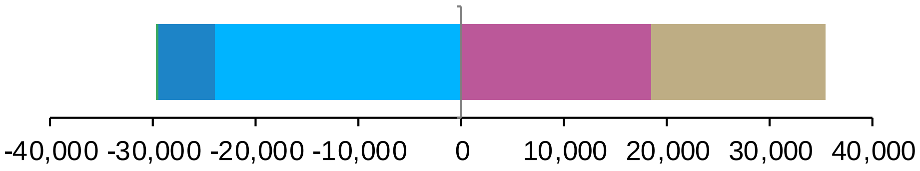
## Welsh Government

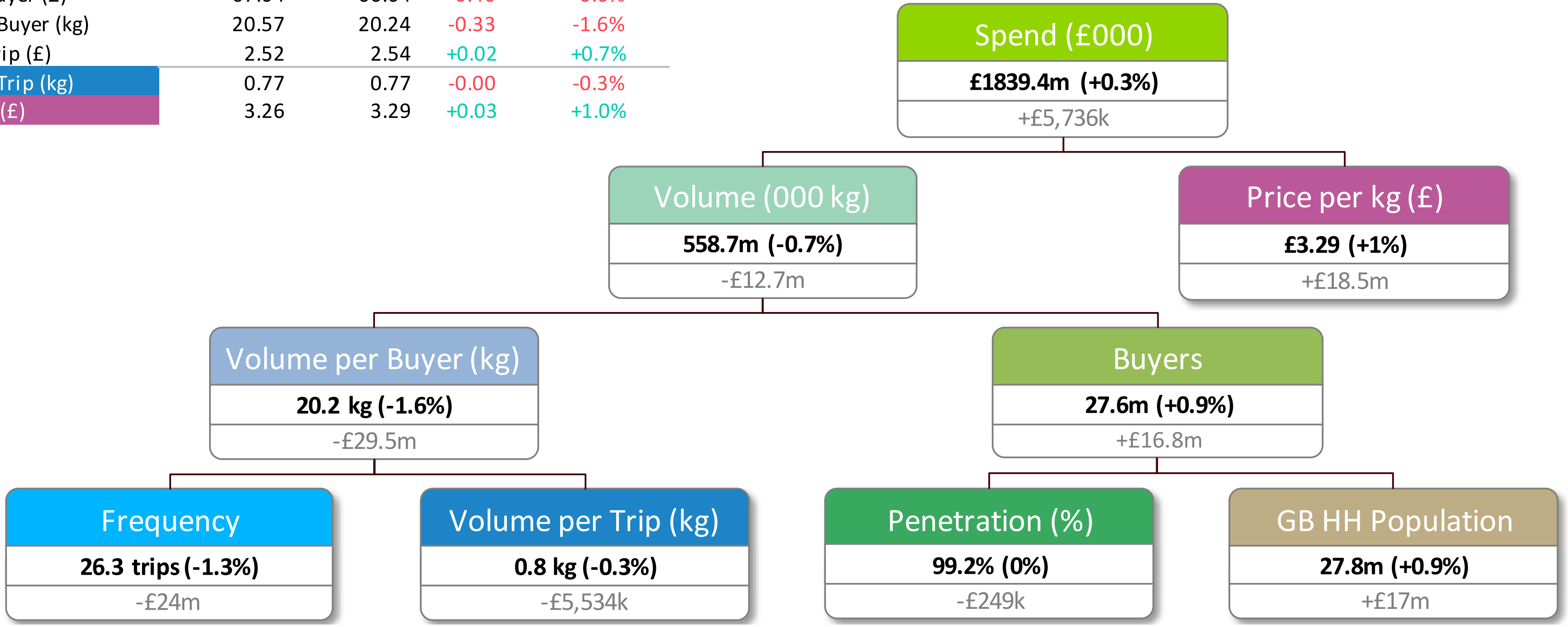
January 2020

Kantar, Worldpanel Division

# Although GB basket size and frequency of trips are in decline, the rise in average prices, plus increased shoppers due to population change has kept the value of Oils and Fats relatively flat.

| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 1,833,625 | 1,839,361 | +5,736 | +0.3% |
| Volume (000 kg) | 562,598 | 558,701 | -3,897 | -0.7% |
| Penetration (%) | 99.24 | 99.23 | -0.01 | -0.0% |
| Frequency | 26.62 | 26.27 | -0.35 | -1.3% |
| Spend per Buyer (£) | 67.04 | 66.64 | -0.40 | -0.6% |
| Volume per Buyer (kg) | 20.57 | 20.24 | -0.33 | -1.6% |
| Spend per Trip (£) | 2.52 | 2.54 | +0.02 | +0.7% |
| Volume per Trip (kg) | 0.77 | 0.77 | -0.00 | -0.3% |
| Price per kg (£) | 3.26 | 3.29 | +0.03 | +1.0% |

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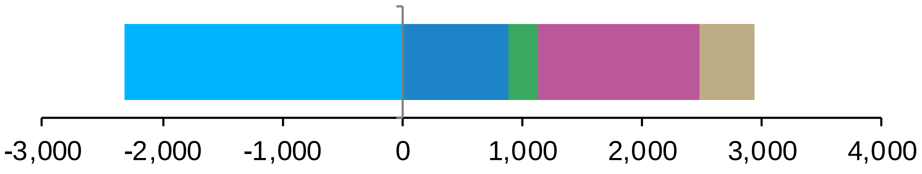
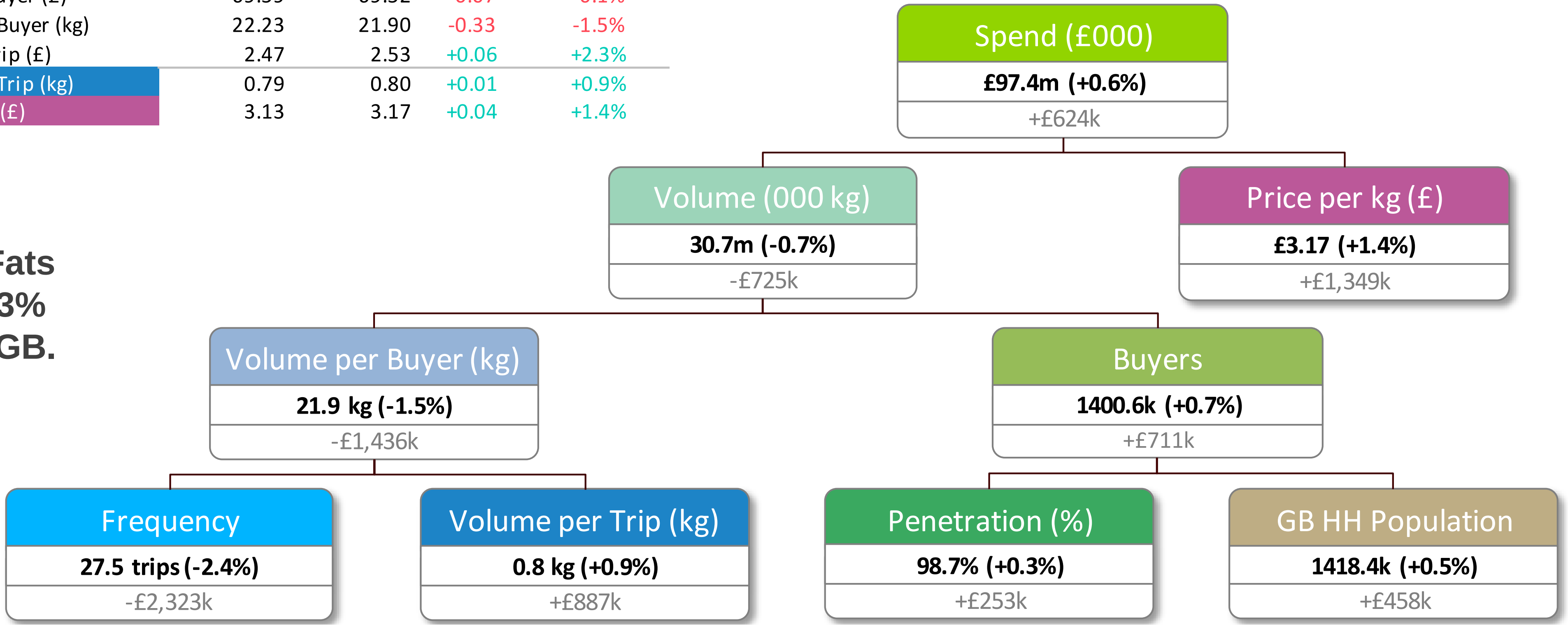
# Oils & Fats in Wales are also in slight growth, driven significantly by average prices. Despite basket size growth, a stronger decline in frequency keeps volume per buyer in decline.

| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 96,738 | 97,362 | +624 | +0.6% |
| Volume (000 kg) | 30,897 | 30,666 | -231 | -0.7% |
| Penetration (%) | 98.49 | 98.75 | +0.26 | +0.3% |
| Frequency | 28.17 | 27.50 | -0.67 | -2.4% |
| Spend per Buyer (£) | 69.59 | 69.52 | -0.07 | -0.1% |
| Volume per Buyer (kg) | 22.23 | 21.90 | -0.33 | -1.5% |
| Spend per Trip (£) | 2.47 | 2.53 | +0.06 | +2.3% |
| Volume per Trip (kg) | 0.79 | 0.80 | +0.01 | +0.9% |
| Price per kg (£) | 3.13 | 3.17 | +0.04 | +1.4% |

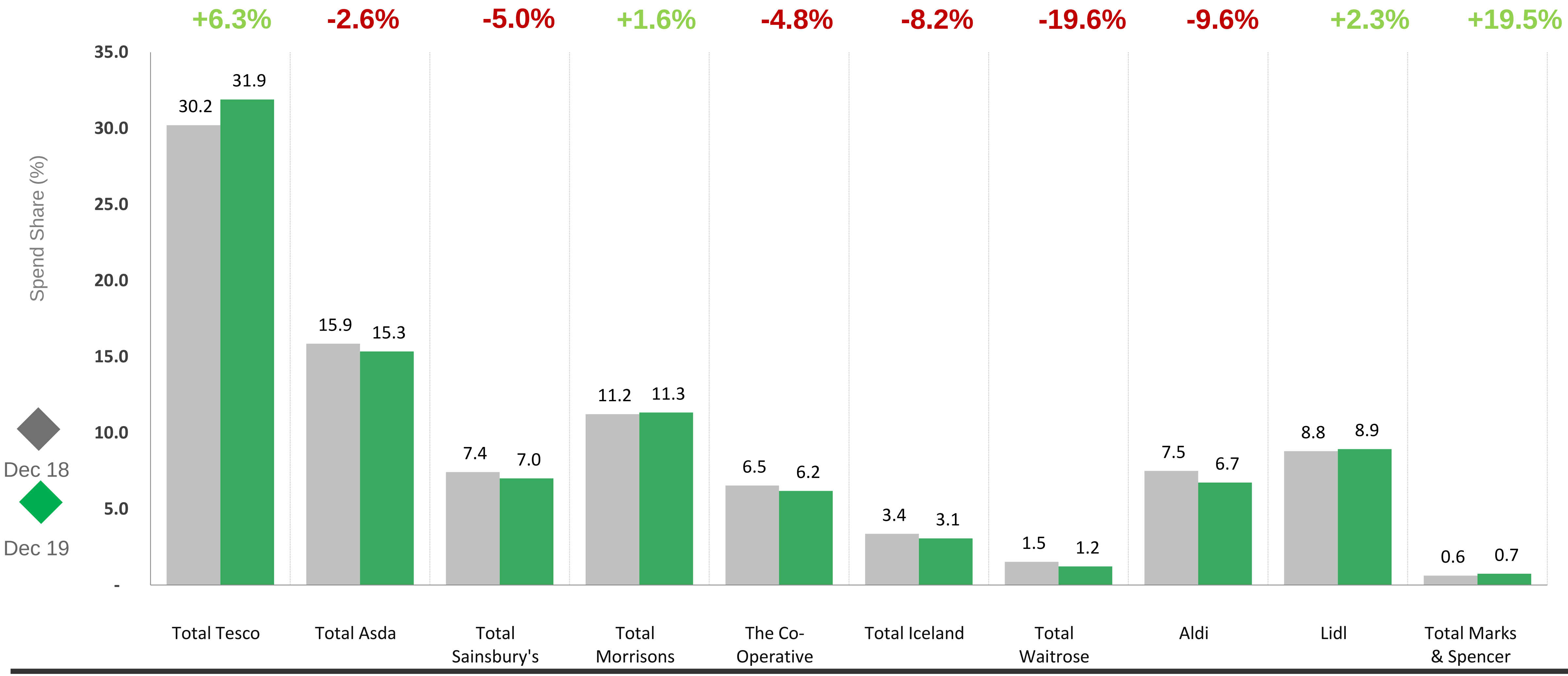
**Value up 0.6% worth £624k**



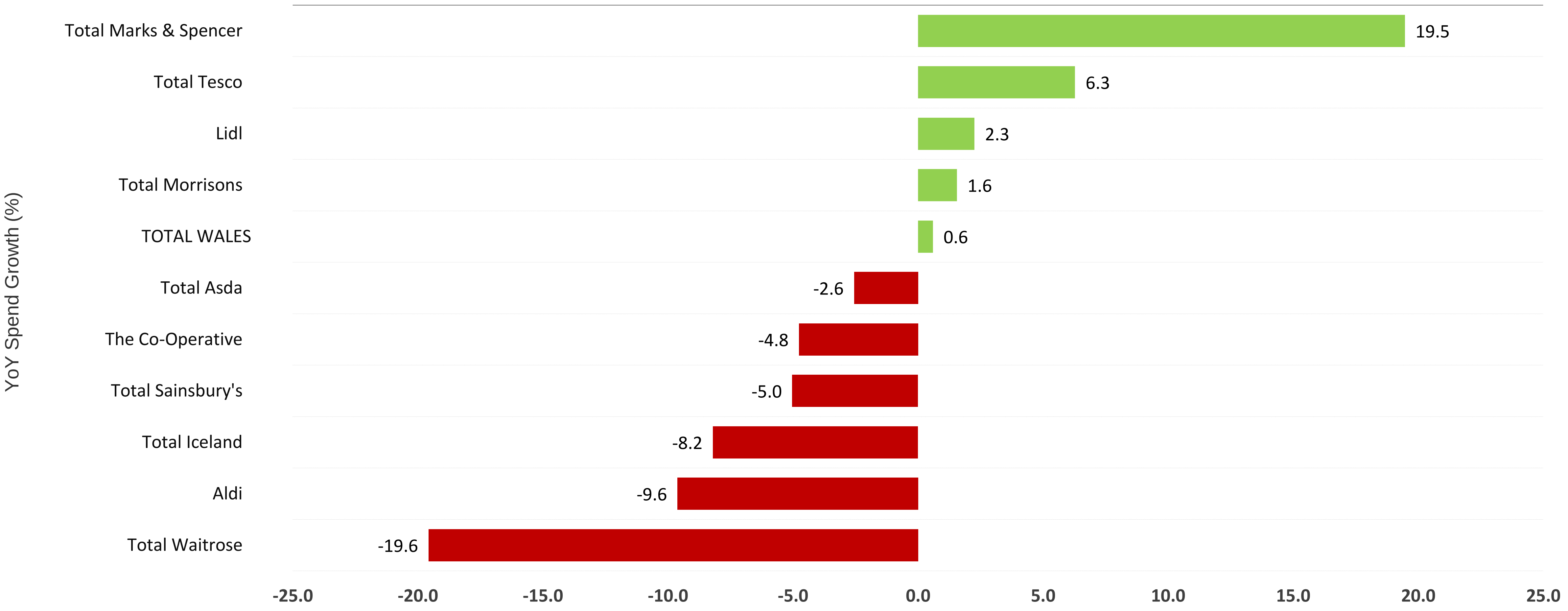

**Total Oils & Fats grows at +0.3% across Total GB.**



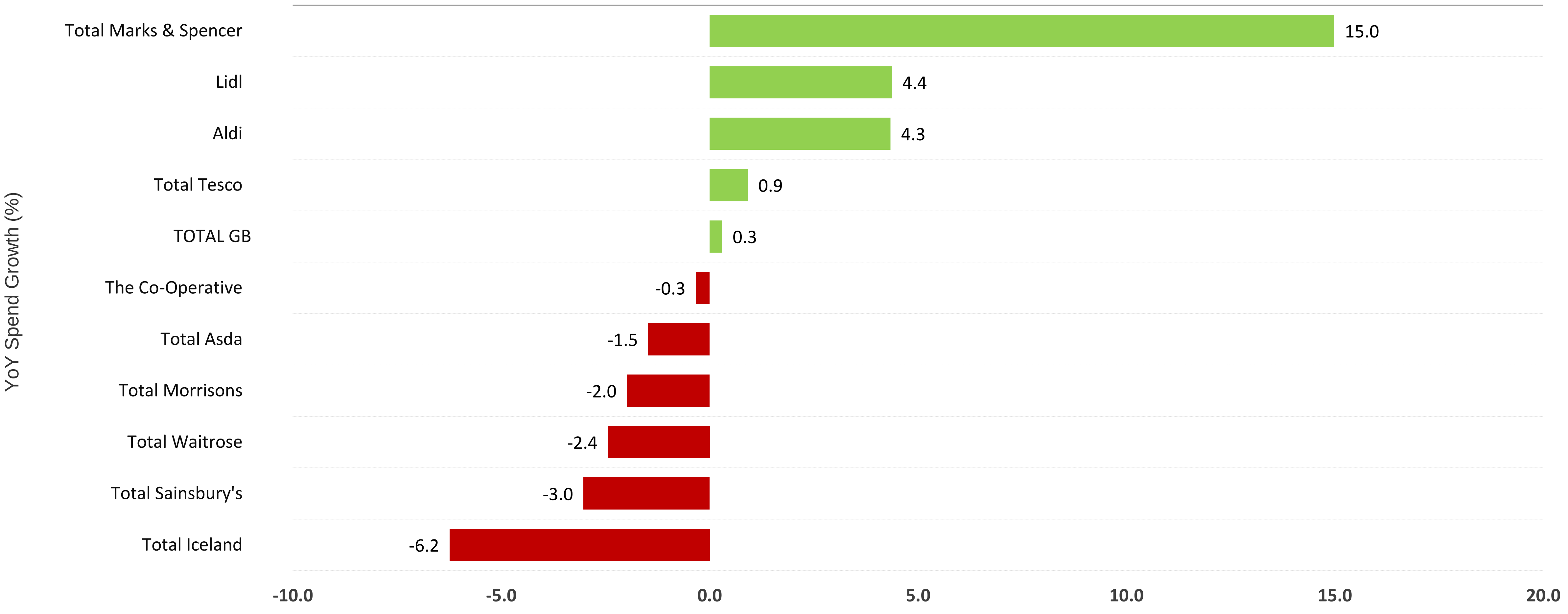
# Tesco have strengthened their position as leading retailer for Oil & Fats, gaining 1.7ppts in share in Wales. Aldi saw the most decline in share, losing 0.8ppts.



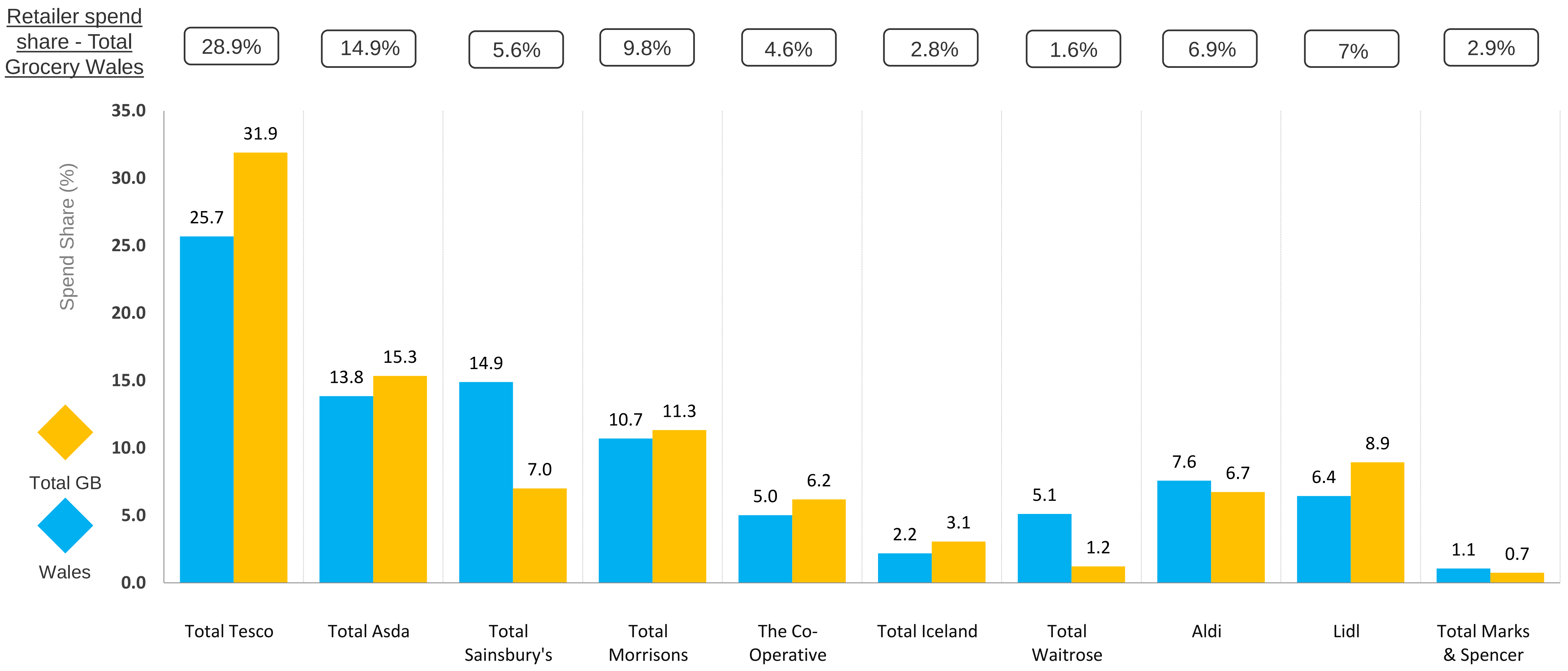
# M&S has outperformed all other retailers but as this is off a small base, Tesco has contributed more in positive value.  Waitrose have seen significant decline for the second year running.



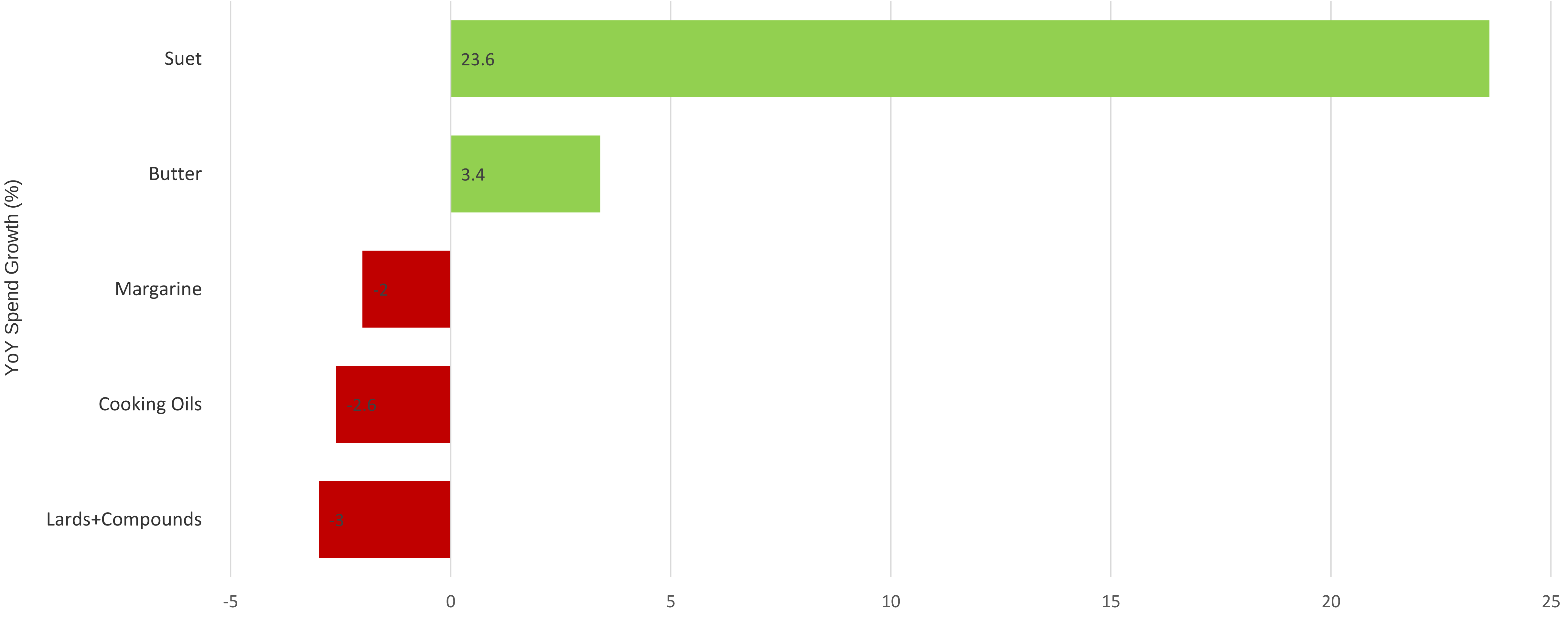
# Across GB, it is a similar story for M&S and Tesco outperforming the market, albeit slightly slower than in Wales.  Morrison's experiences decline across total GB though.



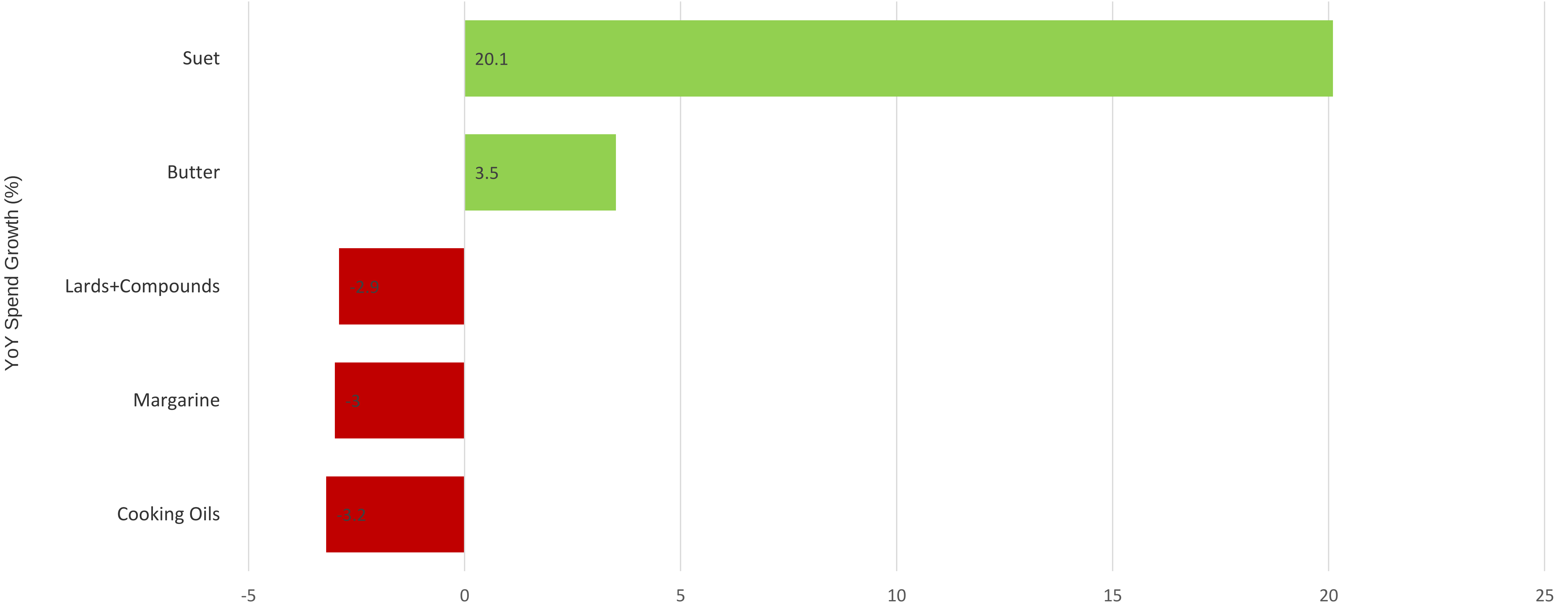
# Within Oils & Fats all retailers bar Waitrose, M&S and Aldi overtrade when compared to Welsh Grocery share.



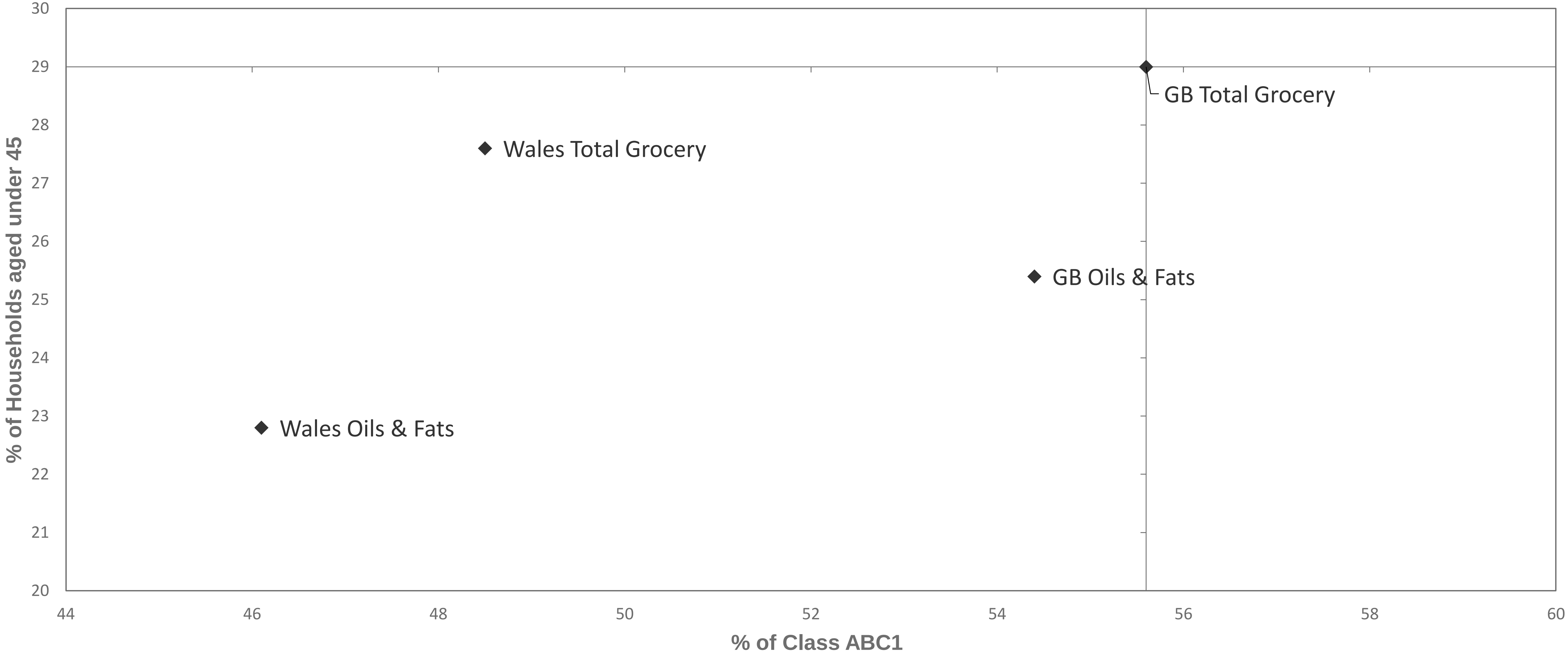
# Suet is in the strongest growth but only worth £375k in Wales, whereas the largest sector, Butter has grown 3.4% and is now worth £50.3m.



# At Total GB level the trends remain the same with Butter and Suet in growth and Cooking Oils leading the decline at -3.2%.



# Oils and Fats are more likely to be bought by older, less affluent shoppers than Total Grocery in both Total GB and Wales. The Welsh Oil shopper is even less affluent and elder than the GB Oil shopper.

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# Total Dairy and Dairy Products

**52we 29 December 2019**

**Welsh Government**

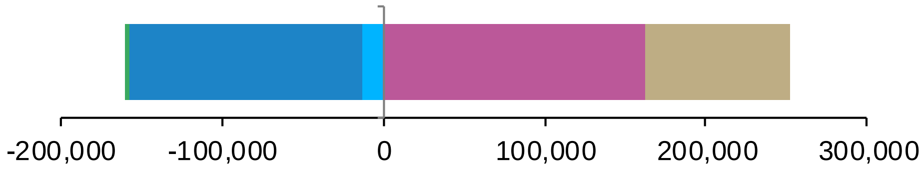
**January 2020**

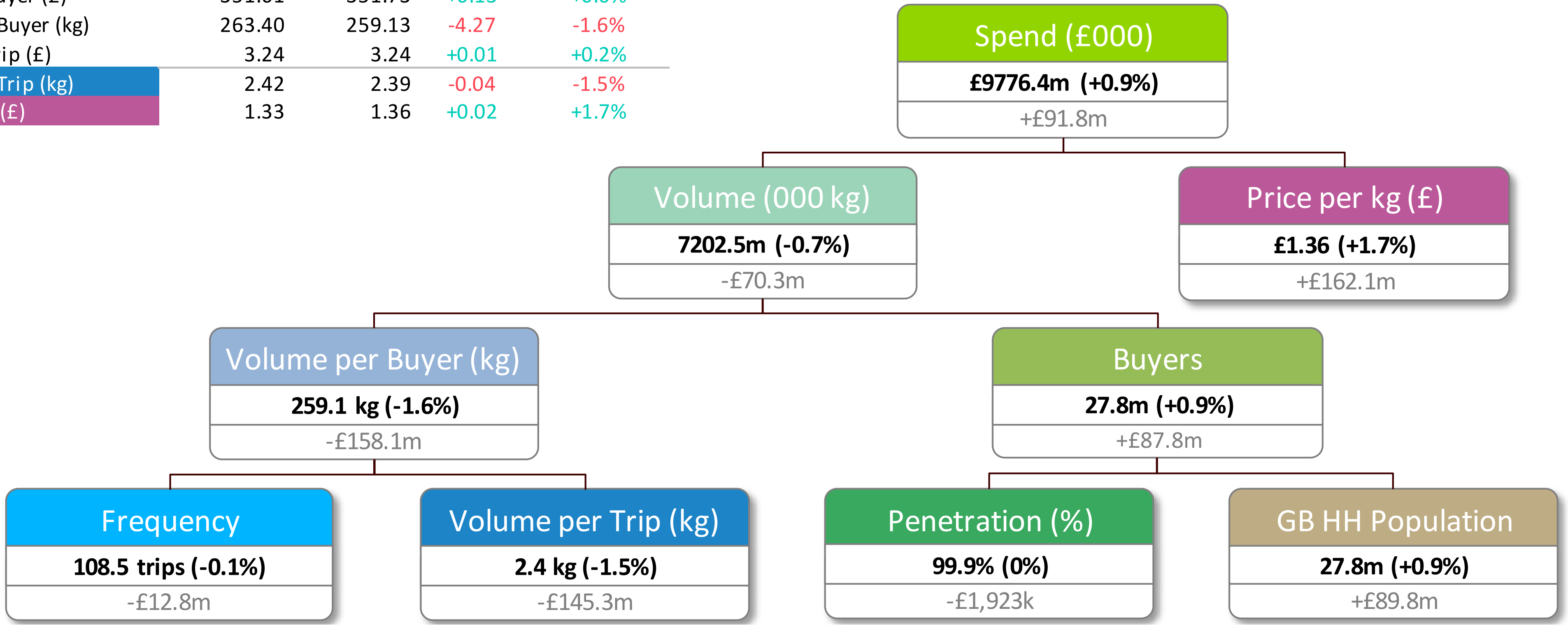
**Kantar, Worldpanel Division**

# The GB Dairy & Dairy Products market has seen 0.9% growth, driven by an increase in price but as with other categories it has seen a decline in basket size.

| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 9,684,574 | 9,776,409 | +91,835 | +0.9% |
| Volume (000 kg) | 7,255,035 | 7,202,536 | -52,499 | -0.7% |
| Penetration (%) | 99.94 | 99.92 | -0.02 | -0.0% |
| Frequency | 108.66 | 108.51 | -0.14 | -0.1% |
| Spend per Buyer (£) | 351.61 | 351.73 | +0.13 | +0.0% |
| Volume per Buyer (kg) | 263.40 | 259.13 | -4.27 | -1.6% |
| Spend per Trip (£) | 3.24 | 3.24 | +0.01 | +0.2% |
| Volume per Trip (kg) | 2.42 | 2.39 | -0.04 | -1.5% |
| Price per kg (£) | 1.33 | 1.36 | +0.02 | +1.7% |

**Value up 0.9% worth £91.8m**

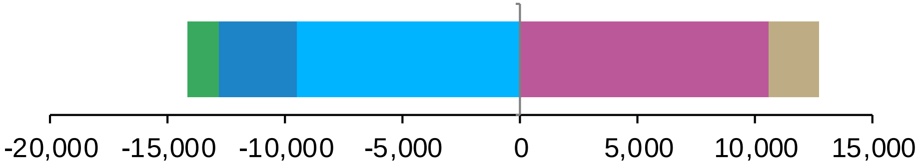


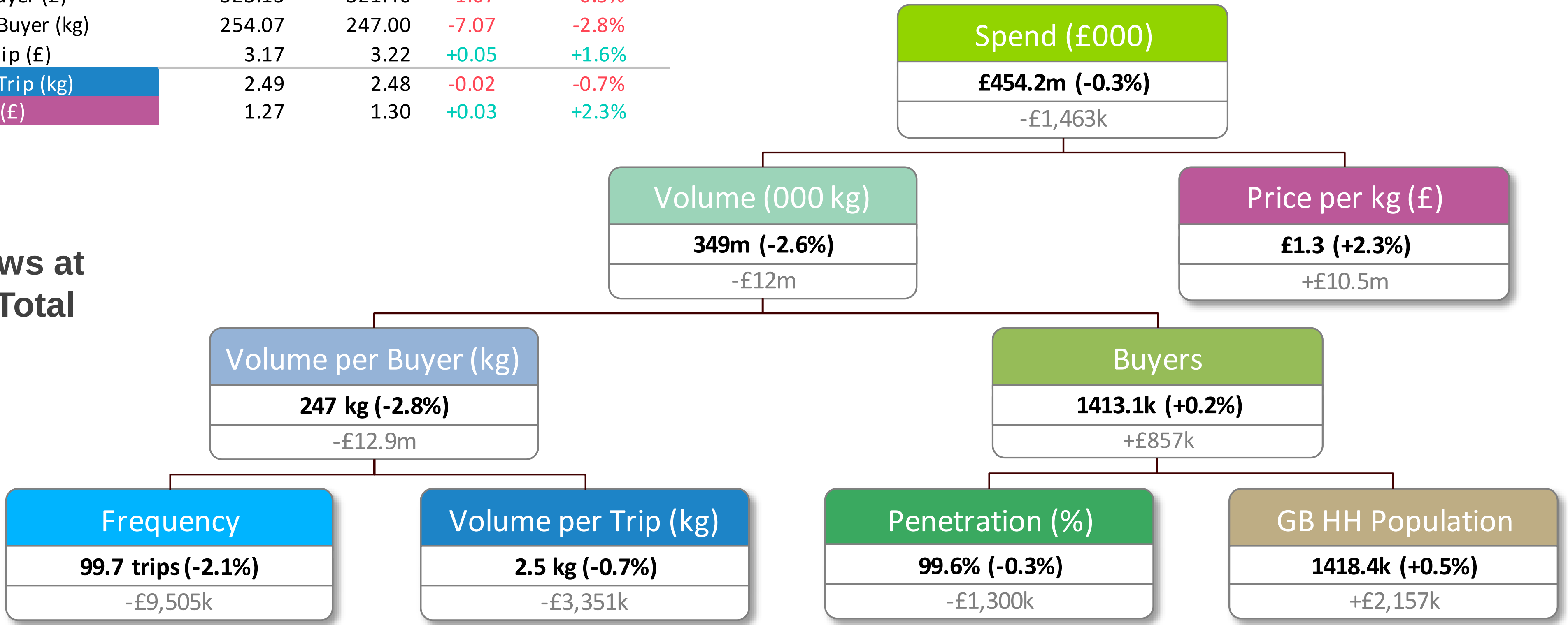
# Wales has seen slight decline however with the growth in prices more than offset by the decline in volume, with frequency driving this rather than volume per trip, as GB level.

| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 455,709 | 454,246 | -1,463 | -0.3% |
| Volume (000 kg) | 358,316 | 349,030 | -9,286 | -2.6% |
| Penetration (%) | 99.91 | 99.63 | -0.28 | -0.3% |
| Frequency | 101.85 | 99.74 | -2.11 | -2.1% |
| Spend per Buyer (£) | 323.13 | 321.46 | -1.67 | -0.5% |
| Volume per Buyer (kg) | 254.07 | 247.00 | -7.07 | -2.8% |
| Spend per Trip (£) | 3.17 | 3.22 | +0.05 | +1.6% |
| Volume per Trip (kg) | 2.49 | 2.48 | -0.02 | -0.7% |
| Price per kg (£) | 1.27 | 1.30 | +0.03 | +2.3% |

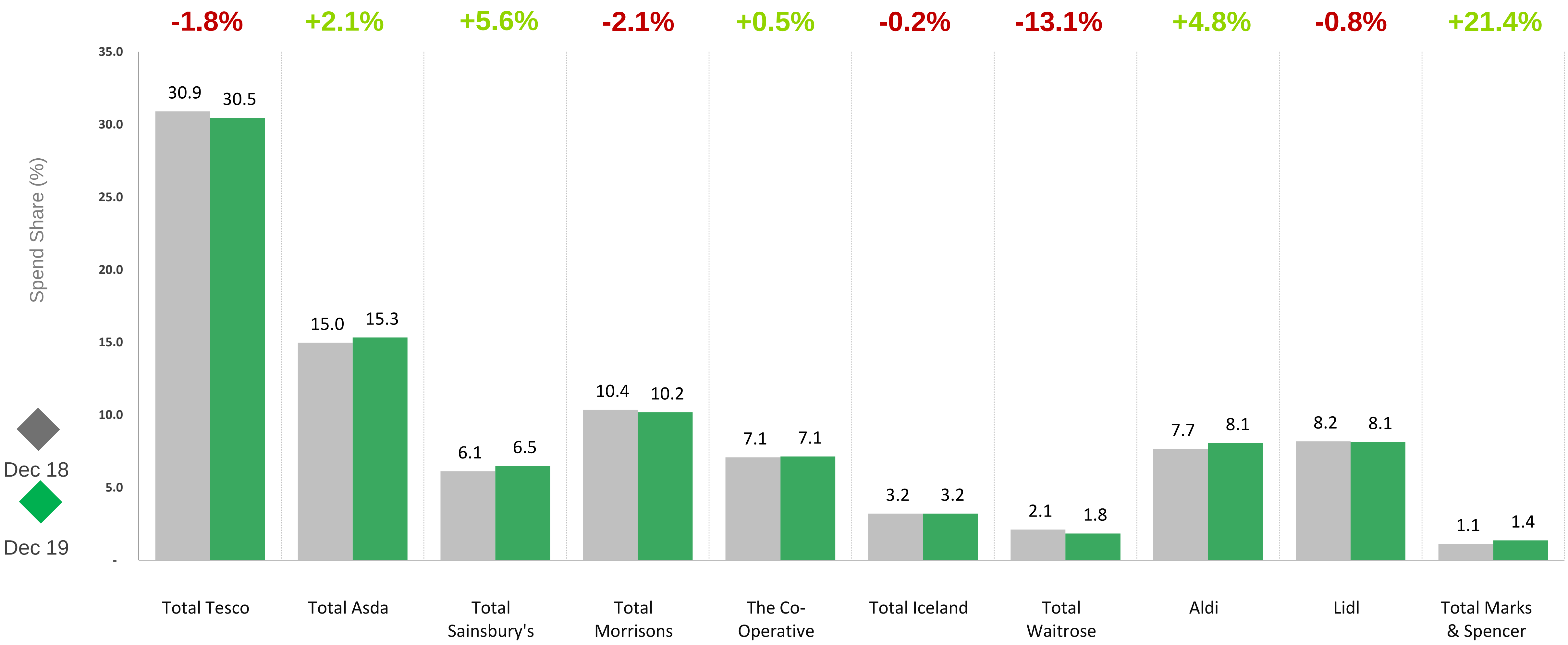
**Value down 0.3% worth £1,463k**



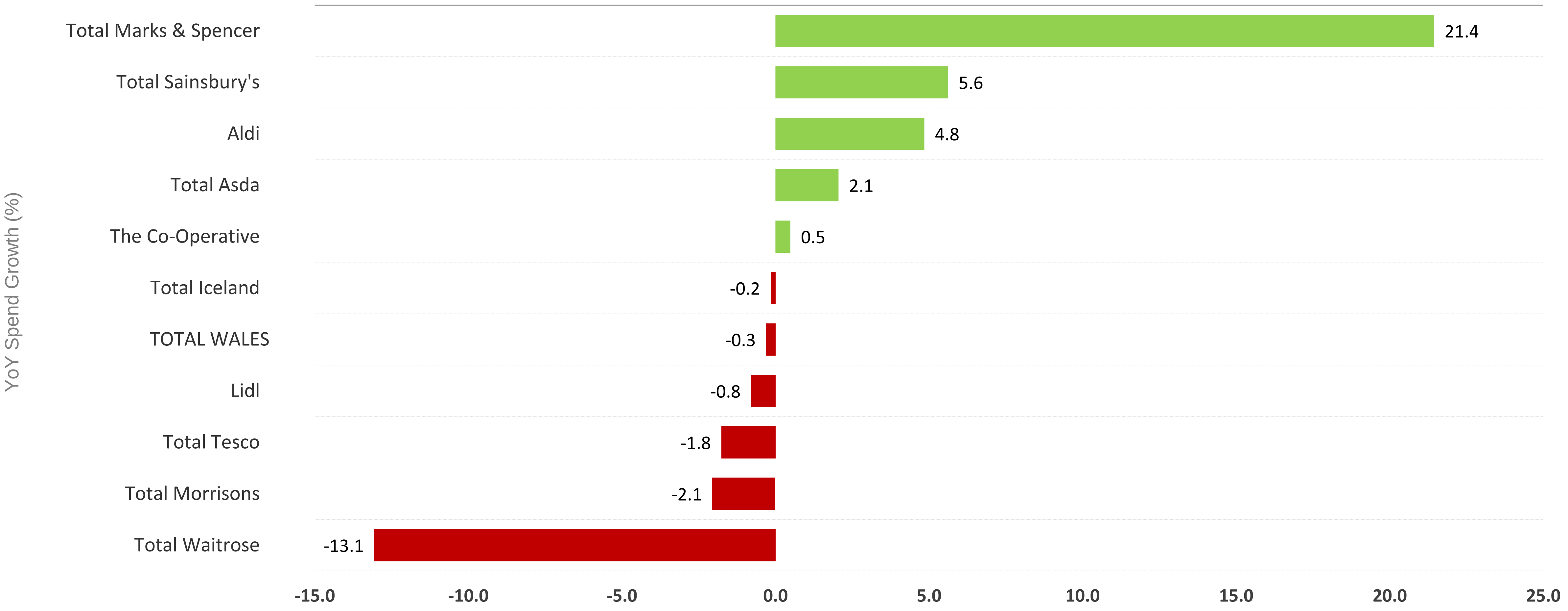

**Total Dairy grows at +0.9% across Total GB.**



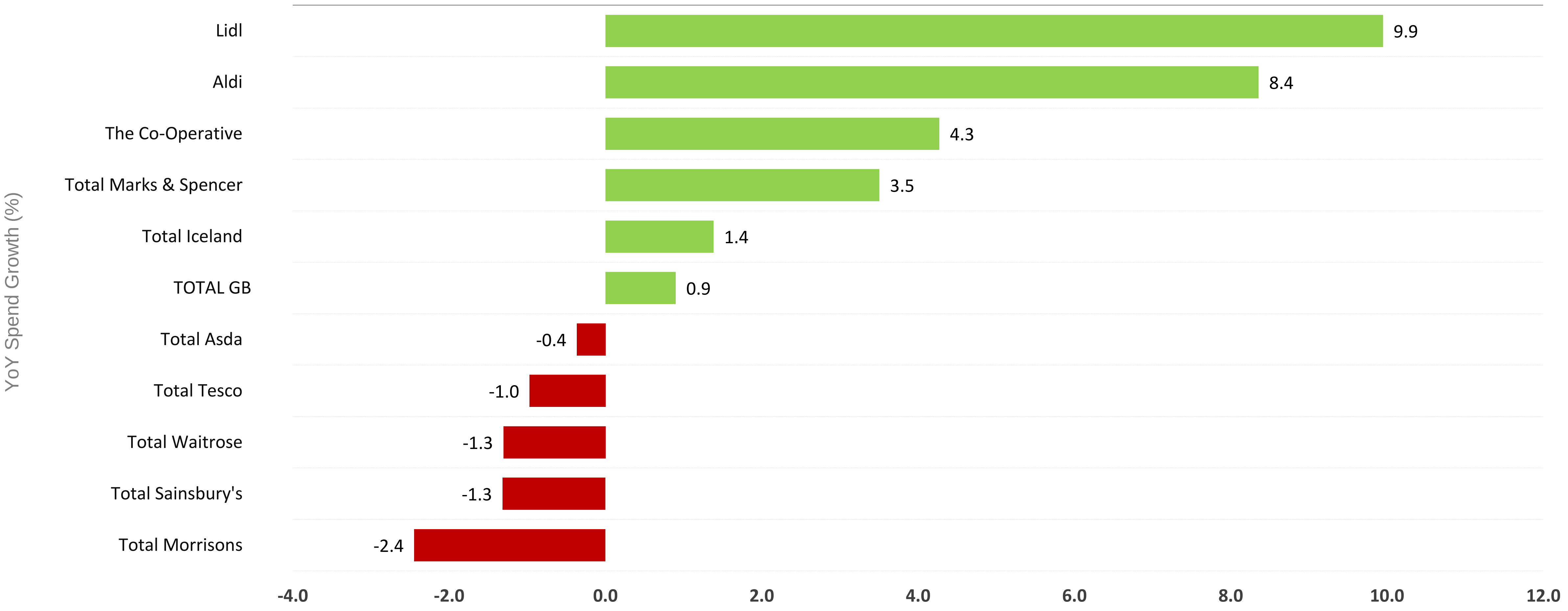
# M&S are the only retailer to deliver double digit growth but Sainsbury's gains the most share on last year. Waitrose was the only retailer to experience double digit decline.



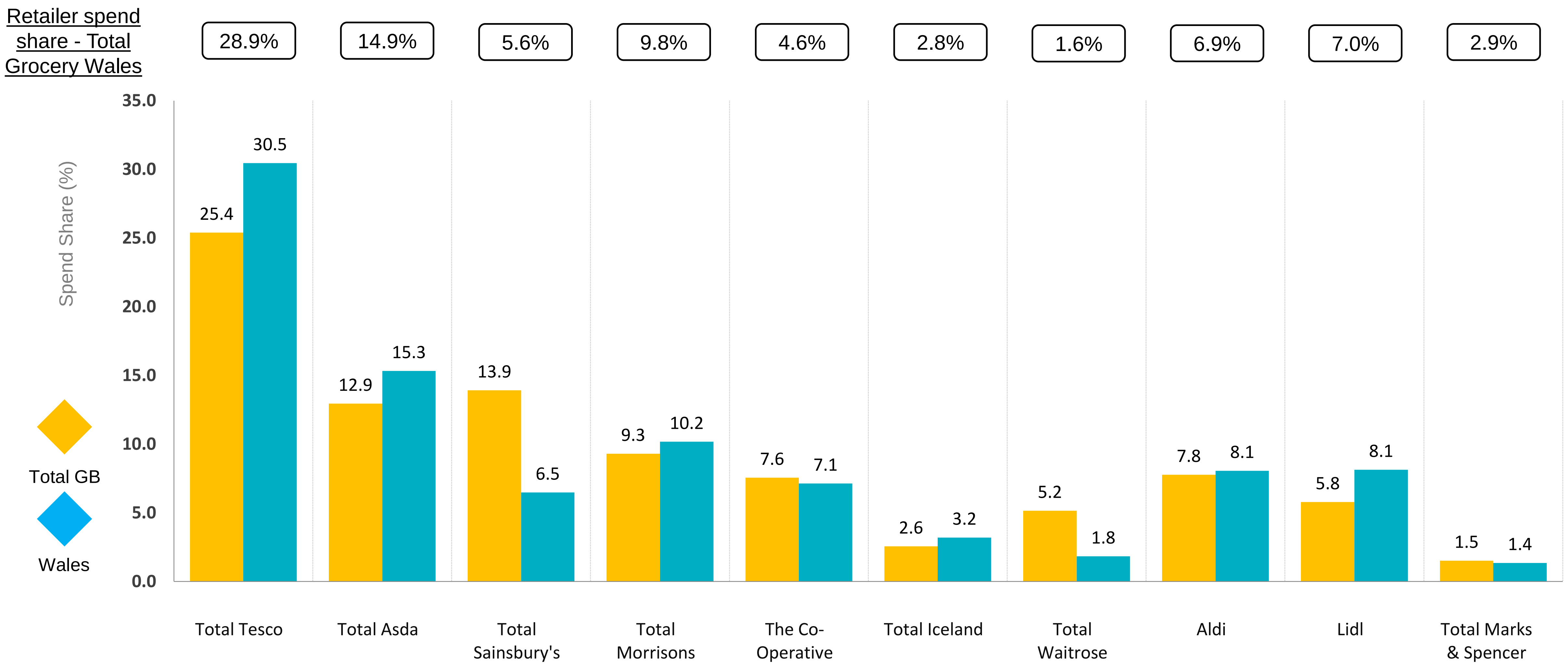
# M&S leads the way with 21.4% growth. Waitrose is not a big player in the market within Wales but saw significant decline. Tesco and Morrison's declines hit the market.



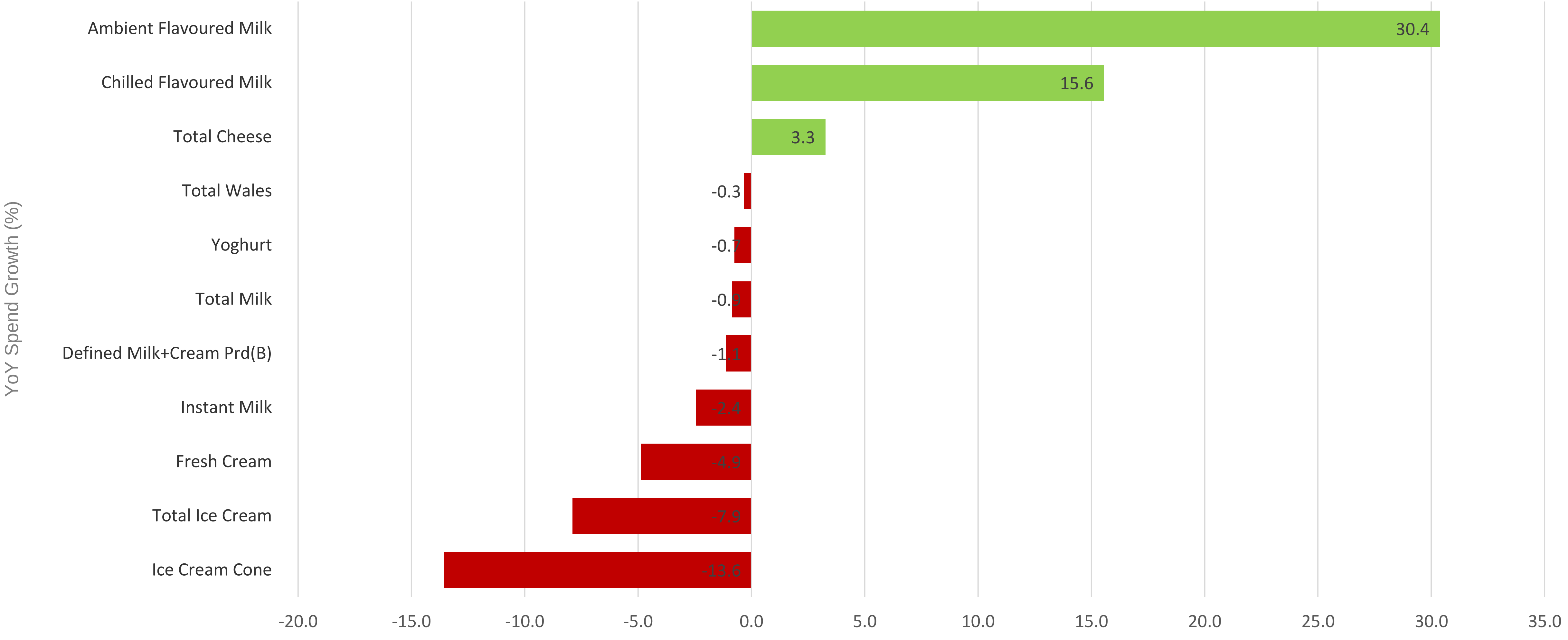
# However, across the GB market it is Aldi and Lidl performing best. Asda and Sainsbury's growth in Wales was not achieved across GB, joining Tesco and Morrison's in decline.



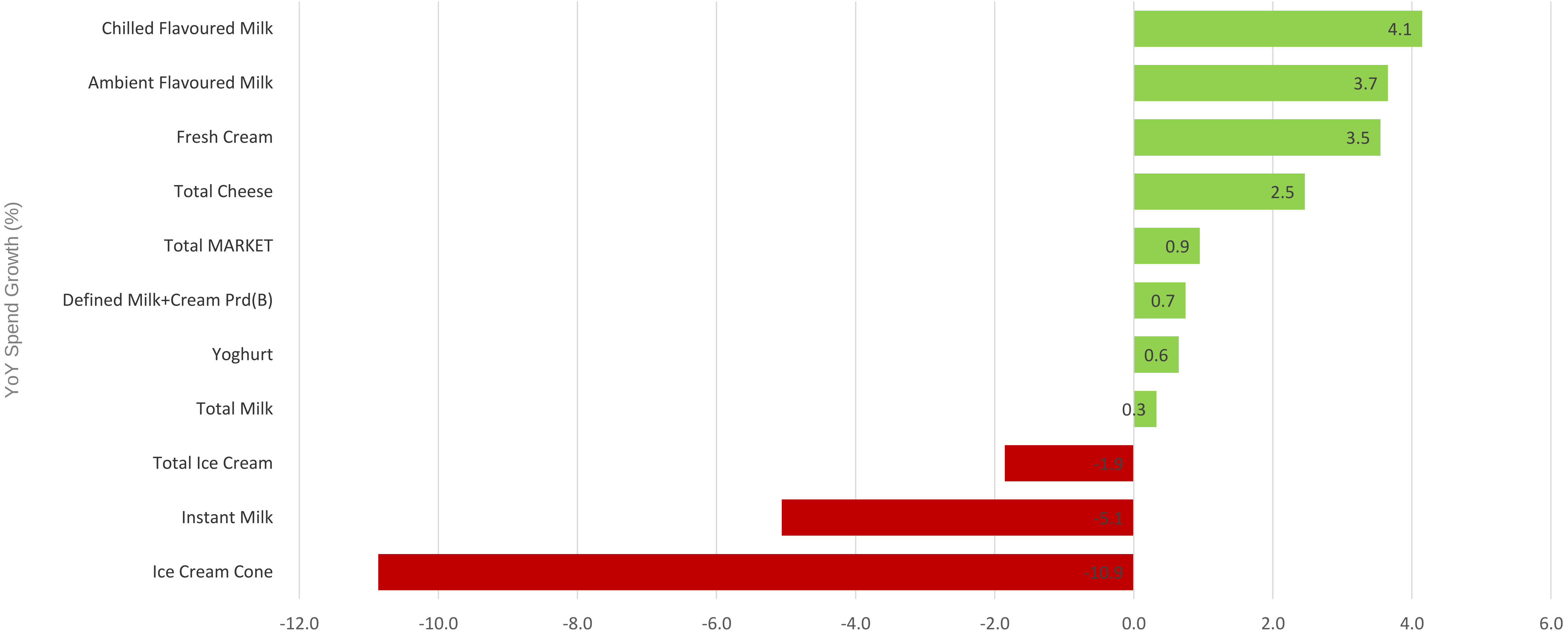
# All of the Big 4 and the Hard Discounters overtrade in Dairy & Dairy Products in Wales against their Wales Grocery share.



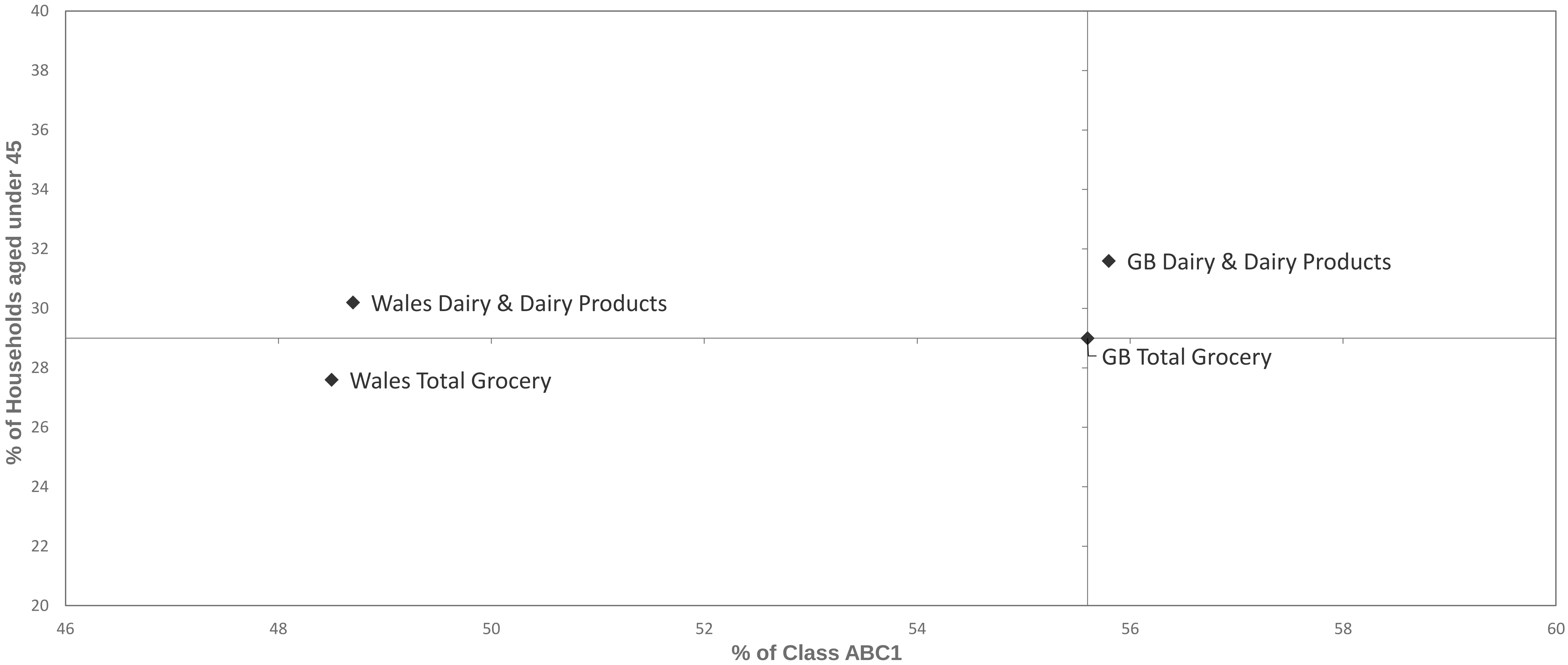
# Ice Cream Cones post the largest % decline but Ice Cream contributed more to the decline in actual spend terms. The second largest sector, Cheese saw 3.3% growth, adding over £4.3m to the Dairy market in Wales this year.



# At total GB level the same trends are evident with Ice Cream Cones and Ice Cream in strong decline, in part driven by the difference in Summer weather in 2019 versus the hot 2018.



# The average Welsh Dairy shopper is slightly younger than the average profile of the Wales Grocery shopper, but they are older and less affluent than Dairy shoppers across GB.

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# Total Animal Feed

## 52we 29 December 2019

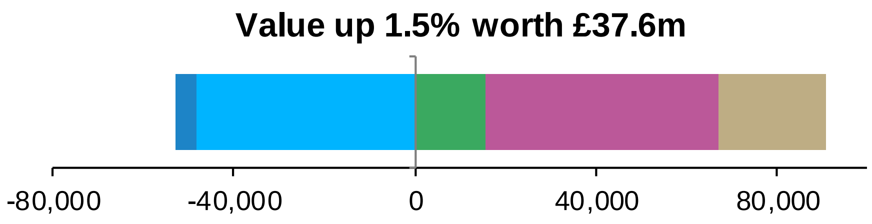
## Welsh Government

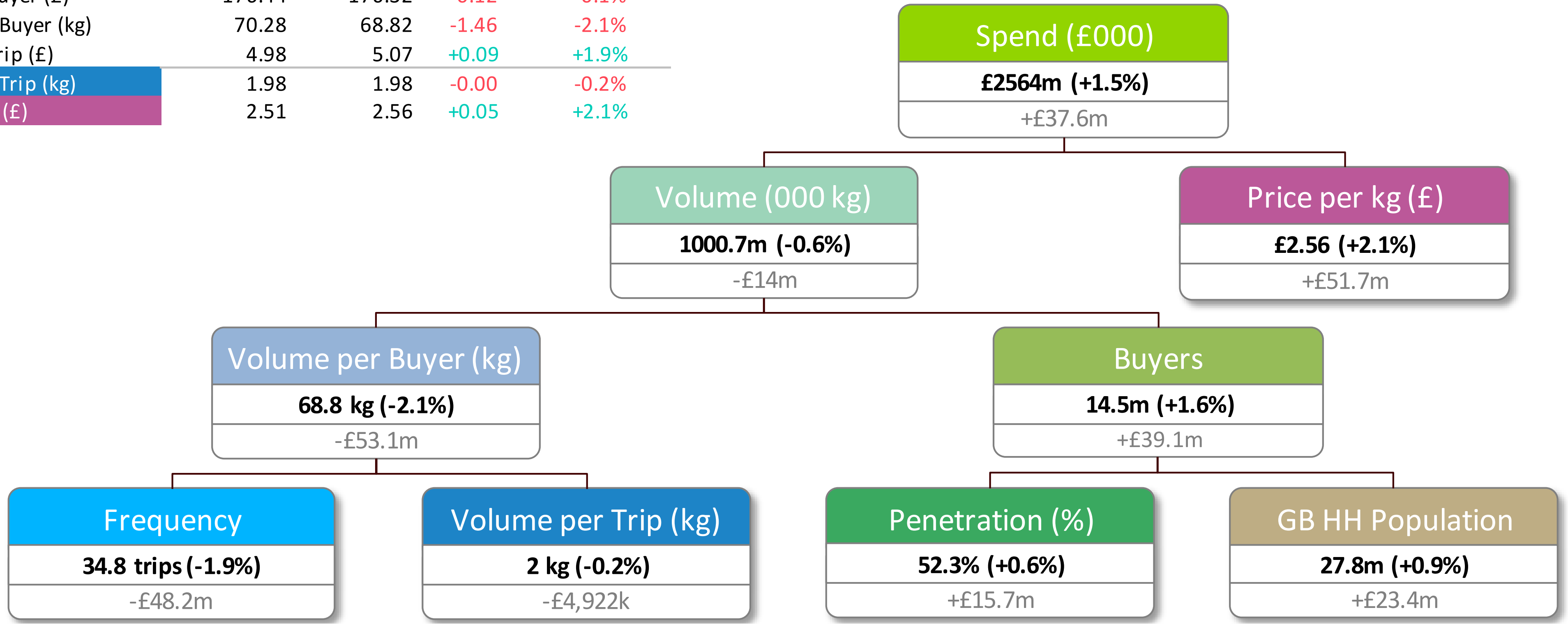
January 2020

Kantar, Worldpanel Division

# Animal Feed is in 1.5% growth across Total GB, the increased pricing and household penetration being key drivers despite shopping frequency being down.

| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 2,526,391 | 2,564,033 | +37,642 | +1.5% |
| Volume (000 kg) | 1,006,297 | 1,000,697 | -5,600 | -0.6% |
| Penetration (%) | 51.95 | 52.28 | +0.32 | +0.6% |
| Frequency | 35.43 | 34.76 | -0.67 | -1.9% |
| Spend per Buyer (£) | 176.44 | 176.32 | -0.12 | -0.1% |
| Volume per Buyer (kg) | 70.28 | 68.82 | -1.46 | -2.1% |
| Spend per Trip (£) | 4.98 | 5.07 | +0.09 | +1.9% |
| Volume per Trip (kg) | 1.98 | 1.98 | -0.00 | -0.2% |
| Price per kg (£) | 2.51 | 2.56 | +0.05 | +2.1% |

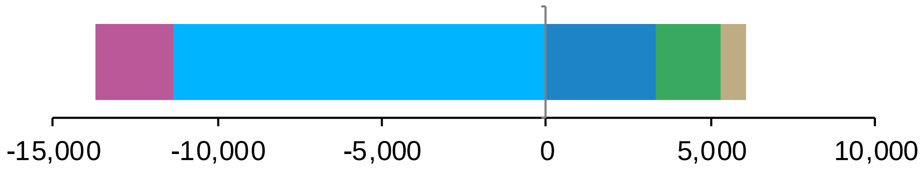


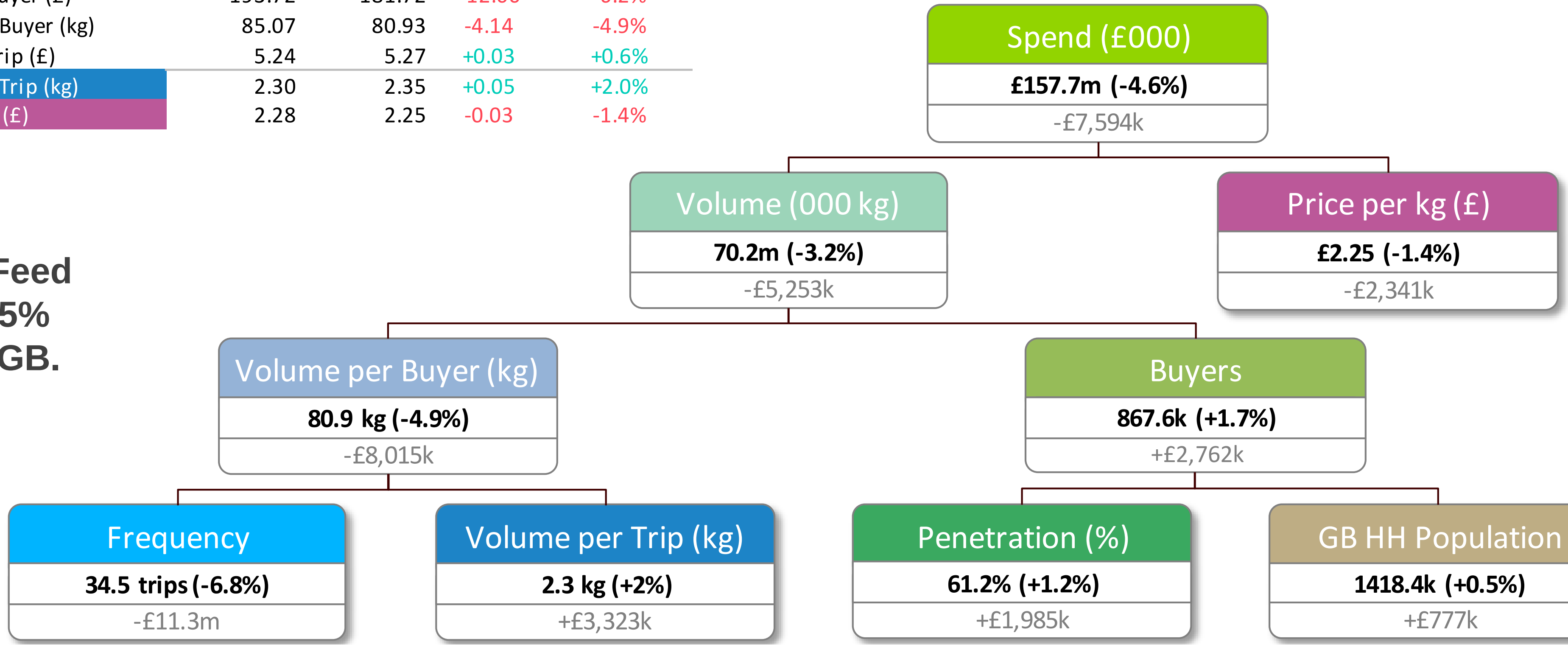
# Within Wales Animal Feed has seen significant decline, with the majority being driven by making 2 fewer trips and therefore buying less per person over the year.

| Measure | 52 w/e 30 Dec 18 | 52 w/e 29 Dec 19 | Change (Actual) | Change (%) |
|---|---|---|---|---|
| Spend (£000) | 165,246 | 157,652 | -7,594 | -4.6% |
| Volume (000 kg) | 72,563 | 70,210 | -2,353 | -3.2% |
| Penetration (%) | 60.43 | 61.17 | +0.74 | +1.2% |
| Frequency | 36.97 | 34.47 | -2.50 | -6.8% |
| Spend per Buyer (£) | 193.72 | 181.72 | -12.00 | -6.2% |
| Volume per Buyer (kg) | 85.07 | 80.93 | -4.14 | -4.9% |
| Spend per Trip (£) | 5.24 | 5.27 | +0.03 | +0.6% |
| Volume per Trip (kg) | 2.30 | 2.35 | +0.05 | +2.0% |
| Price per kg (£) | 2.28 | 2.25 | -0.03 | -1.4% |

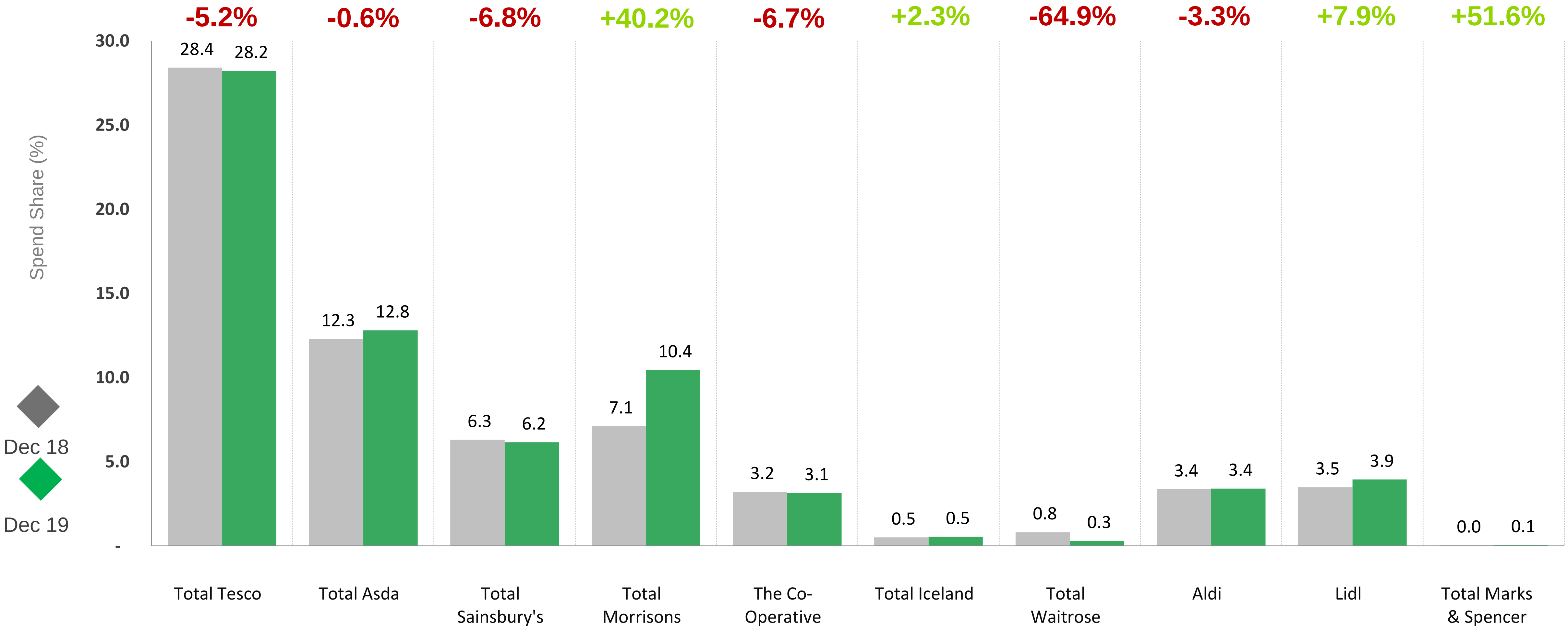
**Value down 4.6% worth £7,594k**



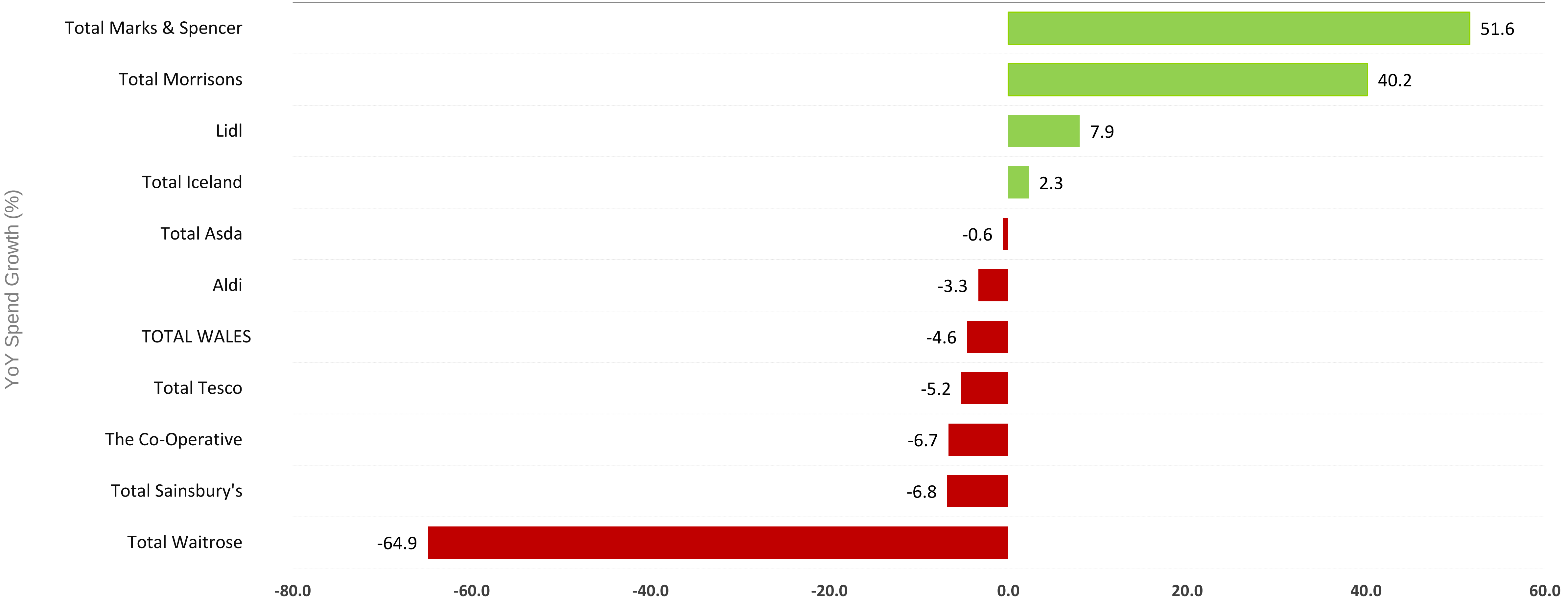

**Total Animal Feed grows at +1.5% across Total GB.**



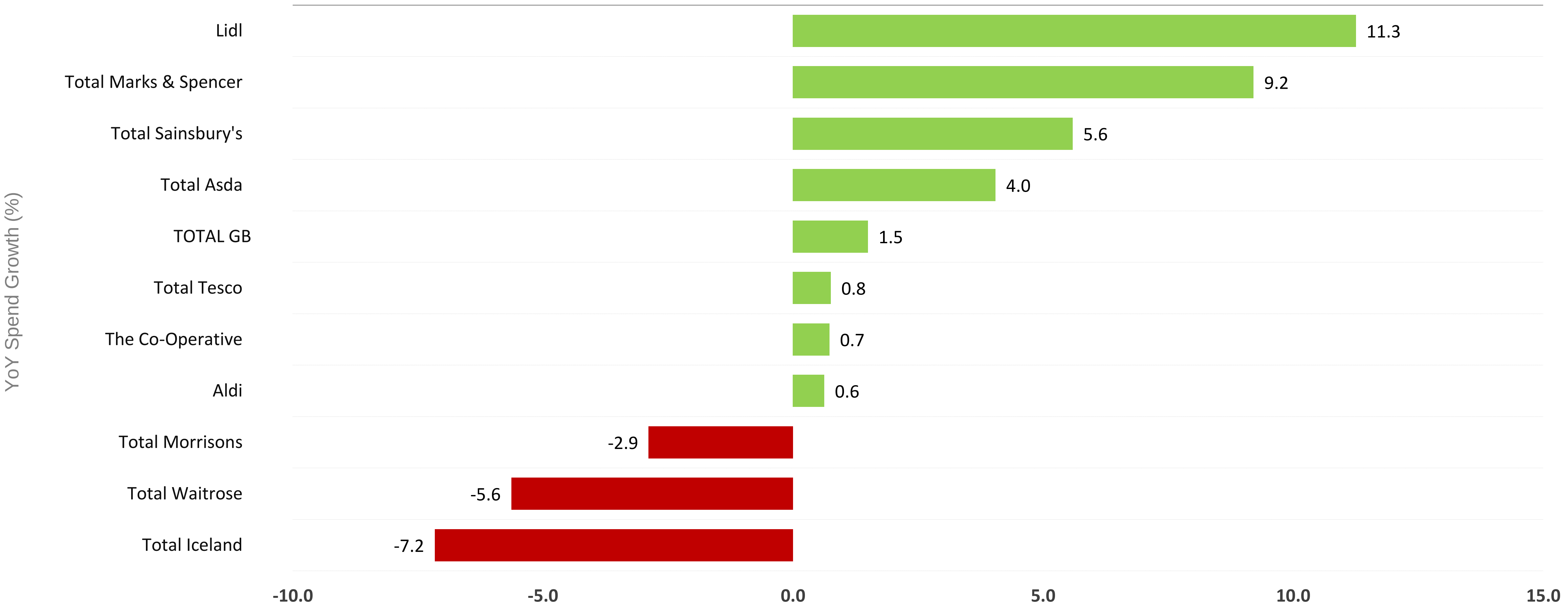
# Morrisons was the clear winner within Animal Feed in Wales, gaining +3.3ppts share. Lidl was the only other retailer with notable share growth, whereas the other Big 4 retailers all saw declining sales.



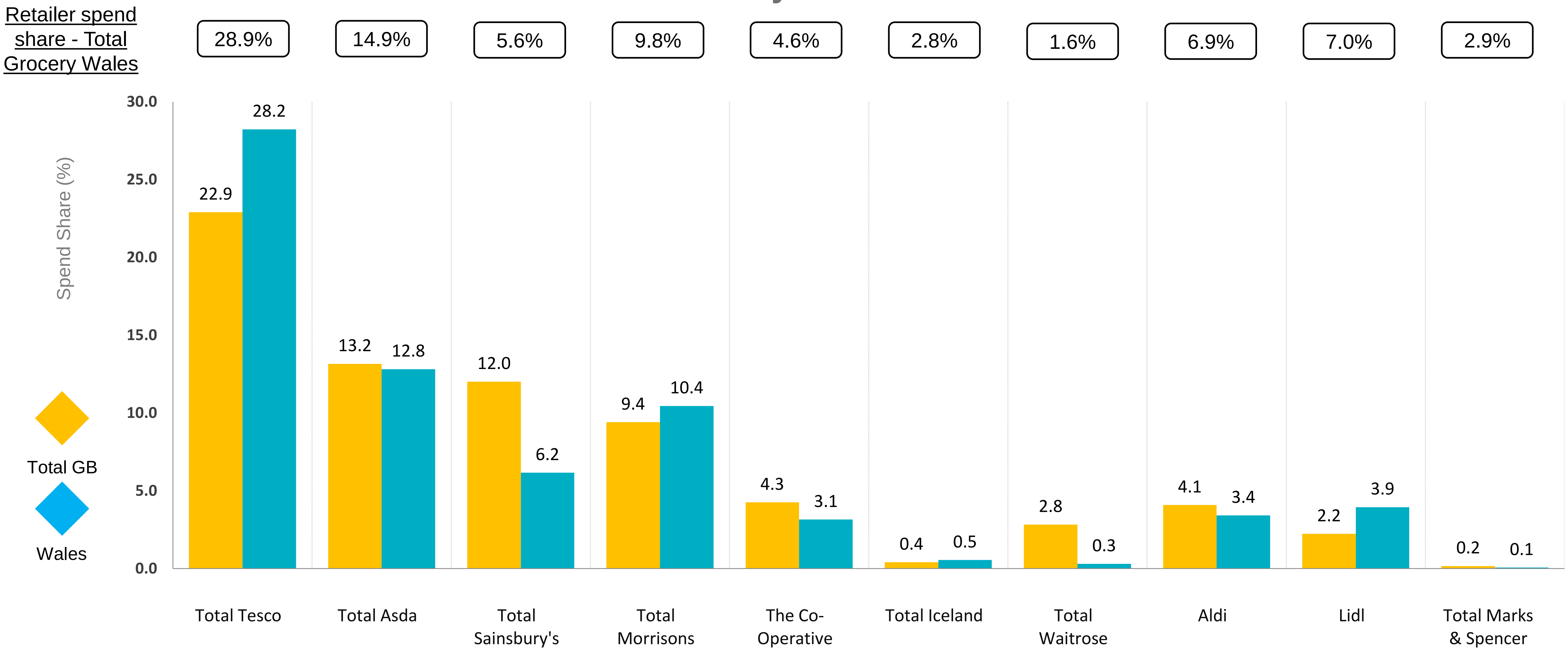
# Tesco, Co-Op, Sainsbury’s and Waitrose all underperformed against the declining market in Wales. M&S’ growth was the strongest, albeit off a small base, whereas Morrisons grew by 40.2%, boosting share to over 10% of the market.



# Despite the strong performance in Wales, Morrisons actually declined across Total GB. Lower growth rates across GB meant, Lidl is the only retailer to deliver double digit growth.



# Despite a significant overtrade vs GB Animal Feed, Tesco undertrades in compared to its Wales Grocery share. Morrison's strong performance has taken the retailer to achieve its fair share and overtrade versus its Wales Grocery and GB Animal Feed shares.

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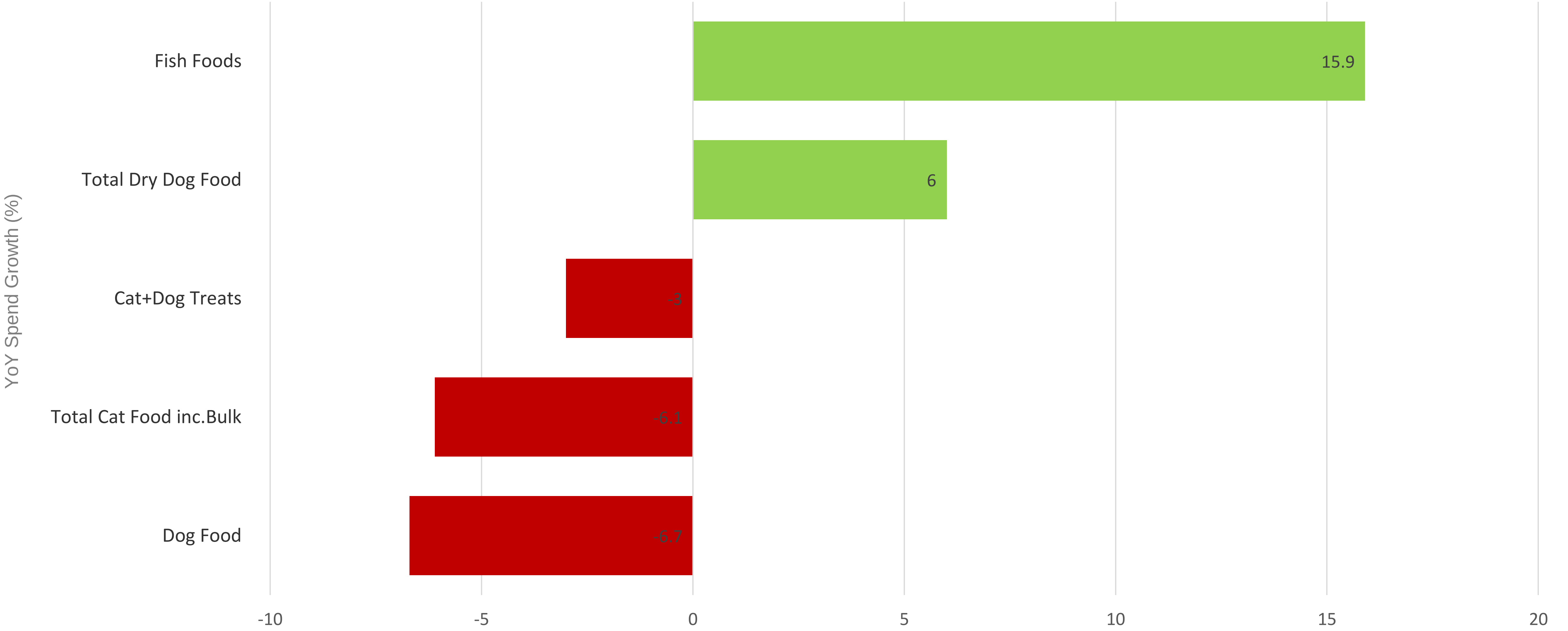
# Fish & Dry Dog foods delivered strong growth in Wales, although it is the smallest sector, only accounting for 0.4% of the market. Dog and Cat Food’s combined decline equated to a loss of £7.3m in sales.

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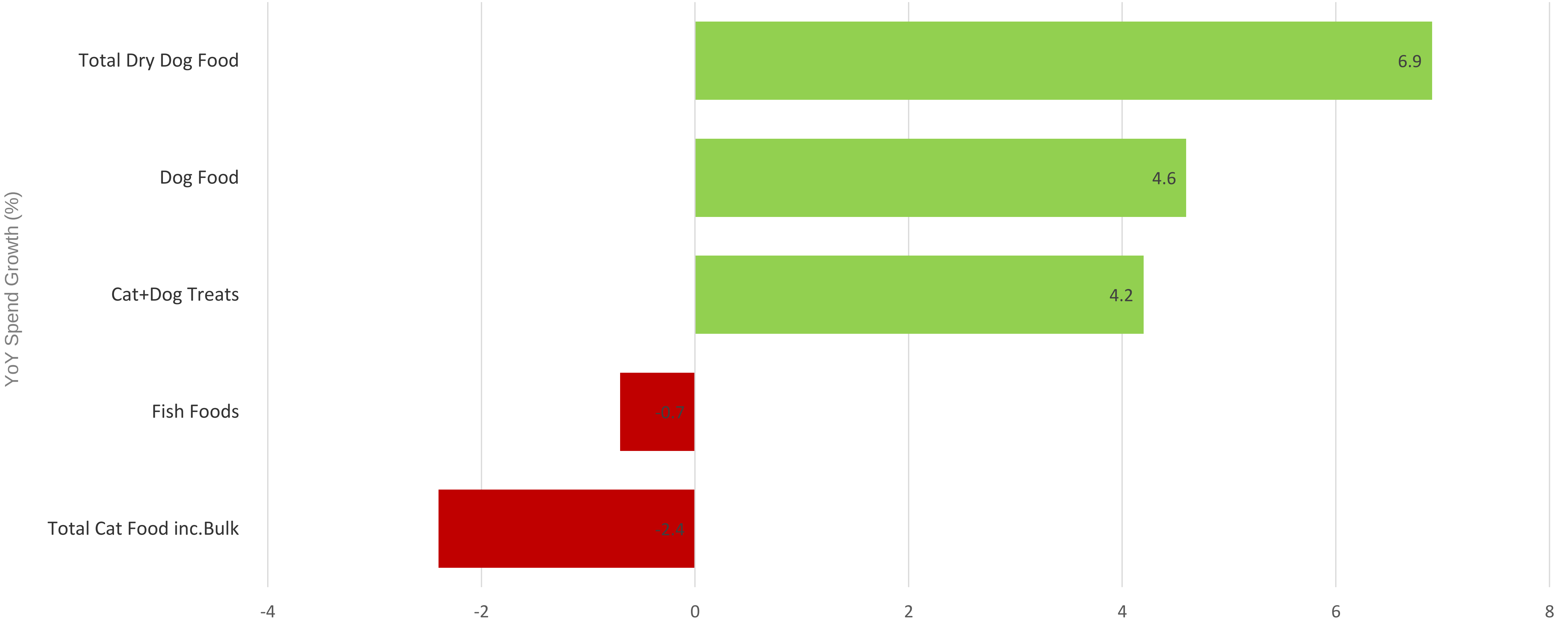
# However, across GB, the Dog Food sector has grown 4.6%, contributing £28m additional sales, although this is countered by the decline in Cat Food.



# Animal Feed across GB is bought by significantly older and less affluent shoppers when compared to GB Grocery.  The same trend applies within Wales, yet the difference in social class is smaller.

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# Appendix:
# Category Definitions

## Welsh Government

January 2020

Kantar, Worldpanel Division

## Appendix

- **Total Fish and Seafood =** Canned Fish, Fresh Fish and Frozen Fish
- **Total Beverages =** Alcohol; Hot Beverages; Take Home Soft Drinks (excluding Ambient Flavoured Milk); and Chilled Drinks (excluding Chilled Flavoured Milk)
- **Total Bakery =** Ambient Bakery Products; Biscuits (excluding Cereal & Fruit Bars); Toaster Pastries (in Packet Breakfast); Chilled Bakery Products; Fresh/Chilled Pastry; Frozen Bread and Frozen Savoury Bakery.
- **Cereals, Grains and Starch =** Cereal & Fruit Bars, Canned Pasta Products, Canned Rice Puddings, Breakfast Cereals, Ambient Rice & Savoury Noodles, Complete Dry/Ambient Meals, Cous-cous, Dry Pasta, Dry Pulses & Cereals, Ambient Pizza Bases, Flour, Take Home Savouries (excluding Nuts), Chilled Pizza & Bases, Chilled Rice, Fresh Pasta, Frozen Pizzas
- **Fruit and Vegetables =** Baked Bean, Canned Salads, Canned Vegetables, Fruit Filling, Prepared Peas & Beans, Tinned Fruit, Tomato Products, Vegetable In Jar (all Canned Goods), Nuts (Sweet Home Cooking), Nuts (Take Home Savouries), Chilled Prepared Salad (Chilled Convenience), Fruit & Veg & Salads, Frozen Vegetables and Frozen Vegetarian Prods.

## Appendix

- **Meat and Meat Products =** Canned Hot Meats, Cold Canned Meats (in Ambient Groceries); Chilled Processed Poultry, Chilled Ready Meals, Cooked Meats, Loose Fresh Meat & Pastry, P/P Fresh Meat+Veg+Pastry (in Chilled Convenience); Fresh Meat; Fresh Poultry+Game; Frozen Meat; Frozen Poultry+Game; Frozen Cooked Poultry and Frozen Meat Products (in Frozen Prepared).
- **Oils and Fats =** Cooking Oils and Suet (in Savoury Home Cooking); Butter, Lards+Compounds and Margarine (in Dairy).
- **Dairy and Dairy Products =** Defined Milk+Cream Products (B) and Instant Milk (in Sweet Home Cooking); Ice Cream Cone (in Take Home Confectionary); Ambient Flavoured Milk (in Take Home Soft Drinks); Chilled Flavoured Milk; Dairy Products; Total Ice Cream (in Frozen Confectionary).
- **Animal Feed =** Cat+Dog Treats, Dog Food, Fish Foods, Total Cat Food Inc. Bulk, Total Dry Dog Food