Bwyd a Diod Cymru
Food & Drink Wales

The Insight Programme

World Class Insight for Welsh Food & Drink Business
Bite-sized Summary of Reports

Y Rhaglen Mewnwelediad
The Insight Programme

BROOKDALE CONSULTING

Economic Overview – March 2024

An economic overview from Food & Drink Wales Insight Programme, focusing on the good news and the uncertain news, with a look at the implications for food and drink businesses.

Key Points of Interest:

- A series of charts showing the good news in the UK economy: UK inflation has fallen from its peak of 9.6% in October 2023 to 4% in January 2024, the main driver of UK inflation is services inflation and UK unemployment is at a long-term low of 3.9%. Redundancies are still very low & UK vacancies have dropped, and there is slightly more optimism in the business sector.
- A series of charts showing the uncertain news on the UK economy: Economic inactivity is now starting to rise; UK GDP is flat lining and interest rates have risen substantially to control inflation. UK Natural Gas prices are too high still to have a sustainably productive production sector and consumer confidence is down from -19 to -21.
- According to The Bank of England's latest inflation forecast inflation is expected to return to the 2% target by Q2 2025. The forecasting track record has not been good however – there could be further shocks due to the Houthi rebel crisis for example.
- Consumers are feeling the pressure due to higher taxes which means less money to spend.
- The pressures are still the same for Welsh Food & Drink businesses as last year, with high energy costs, a shortage of labour availability, high commodity prices and low consumer confidence, now with the added implications of farmers protesting against The Sustainable Farming Scheme and higher interest rates (4%).
- Chart showing different inflation rates; deflation in milk, butter and cream.
- Chart showing how all social classes are affected by the cost-of-living crisis. Wales has 51.1% of share in C2DE consumers compared to 44.2% in GB.
- For Welsh food and drink businesses, understanding how consumers are responding in reduced pack sizes, price points and promotions/loyalty cards is vital.

Note: This presentation was given as part of the Welsh Government's Insight Conference 2024. A recording of this presentation is available on the Food & Drink Wales Members Area.

Links to other relevant reports:

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thefoodpeople Presentation: Top Ten Food & Drink Trends 2023/24 (2023)

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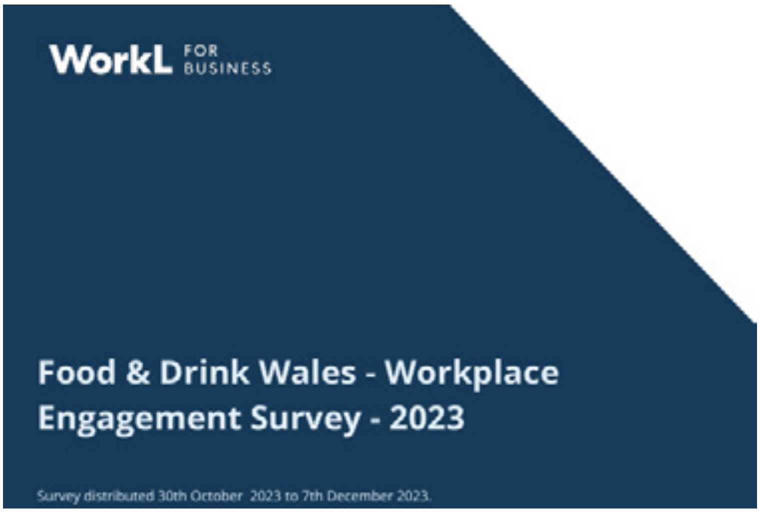
WORKL FOR BUSINESS

Food & Drink Wales Workplace Engagement Survey 2023

A detailed presentation of the Food & Drink Wales Workplace Engagement Survey conducted in 2023, and the services provided by WorkL to measure and improve employee engagement.



Key Points of Interest:

- Food & Drink Wales conducted a Workplace Engagement Survey in 2023 to measure, track, and improve employee engagement. WorkL, the organization conducting the survey, focuses on all aspects of employee experience and offers bespoke surveys, instant data, and tailored e-training. The survey methodology includes measuring reward and recognition, information sharing, wellbeing, instilling pride, empowerment, and job satisfaction.
- The survey had an overall response rate of 384 participants. The key engagement indicators measured were confidence in management, flight risk, wellbeing risk index, and diversity and inclusivity index. The survey also included bespoke questions on reward and recognition, information sharing, empowerment, wellbeing, instilling pride, and job satisfaction.
- The results of the survey showed that Welsh companies scored above the industry average in reward and recognition, empowerment, wellbeing, instilling pride, and job satisfaction.
- The survey also included thematic analysis, which identified main themes such as resources, communication, community, development, pay, and rewards. The overall six-step scores indicated areas for improvement and next steps were outlined to address the feedback from the survey.
- The document provides an overview of the Food & Drink Skills Wales project, which focuses on workforce training, youth engagement, marketing and communications, and sustainability. The project offers training courses in leadership, management, marketing, sales, production, compliance, and sustainability.
- Overall, the document highlights the importance of employee engagement and the benefits of conducting surveys to measure and improve engagement.

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KANTAR CONSULTING

Wales Future Shopper Trends

This presentation explores the 7 key trends that will impact consumers and businesses in the Welsh Food & Drink landscape over the next 5 years. Through qualitative analysis, Kantar has delved into the implications of each trend and outlined actionable strategies for businesses to navigate these changes effectively.

Key Points of Interest:

1. Digital Ubiquity

- What it is: The pervasive integration of technology into daily life, influencing consumer expectations and behaviours.
- What it means: Expect a surge in connected devices, augmented reality in kitchens, AI-driven restaurant efficiencies, and digital transformations in supply chains.

2. Sustainable Imperative

- What it is: The escalating impact of climate change on consumer consciousness and purchasing decisions.
- What it means: Consumers prioritize eco-friendly products and demand transparency from brands regarding sustainability practices.

3. Closer to Home

- What it is: A shift towards home-centric lifestyles, blurring the lines between work, leisure, and dining experiences.
- What it means: Increased demand for high-quality home dining experiences and e-commerce acceleration for home-based food and drink products.

4. Redefining Value

- What it is: Consumers re-evaluate what constitutes value, considering factors like functionality, quality, and sustainability.
- What it means: Rising preference for products from local farmers and companies with ethical practices, emphasizing holistic definitions of value.

5. Holistic Wellbeing

- What it is: A growing focus on holistic health encompassing physical, mental, emotional, and financial well-being.
- What it means: Increased demand for wellness-oriented food and beverage products, such as DNA-based nutritional testing and superfood ingredients.

6. Experiencing Authenticity

- What it is: Consumers seek authentic cultural experiences and flavours, driving interest in ethnic foods and culinary traditions.
- What it means: Mainstreaming of ethnic cuisines, deeper cultural connections through food experiences, and a growing appetite for exploration.

7. Celebrating Heritage

- What it is: A resurgence of pride in local culture and heritage, particularly among younger consumers.
- What it means: Opportunities to celebrate Welsh identity through artisanal offerings and unique dining experiences.

As the Welsh food and drink landscape evolves, businesses must anticipate and adapt to these trends to meet the changing needs and expectations of consumers. By embracing innovation, sustainability, and authenticity, they can thrive in an ever-changing market while celebrating Wales' rich culinary heritage.

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THEFOODPEOPLE

Top 5 Food and Drink Trends 2024/25 to Inspire NPD

thefoodpeople discuss the top 5 food and beverage trends for 2024/25 and emphasise the importance of adaptability and agility in an unstable world

Key Points of Interest:

- The 2024/25 Trend Framework consists of 1 global driver, 4 social and cultural forces, 12 food and beverage mega trends, and 64 trend manifestations.
- The framework provides a comprehensive overview of the key trends that will shape the food and beverage industry in the coming years.

The top 10 food and beverage trends for 2024/25 include:

1. Harnessing AI: The use of artificial intelligence in food and beverage production and innovation.
2. Pillars of Protein: A focus on protein-rich foods and ingredients.
3. Awesome Ambient: The elevation of shelf-stable and dried foods with gourmet ingredients and flavours.
4. Simple Gourmet: Applying gourmet practices to simple dishes for guaranteed satisfaction and deliciousness.
5. Umami 3.0: Exploring new ways to enhance the umami flavour in food.
6. Retro Throwback: Bringing back nostalgic food and beverage items with a modern twist.
7. Regenerate Land and Sea: Promoting regenerative and sustainable farming practices for land and sea.
8. Smart Plants: Utilizing smart technology and innovation in plant-based food products.
9. Hack My Health: Consumers using genetics, neuroscience, and nutrition to optimize their health.
10. Ultra Processed Impact: Examining the impact of ultra-processed foods on long-term health.

- The presentation also mentions other trends outside of the top 10, such as meals inspired by the blue zones, personalized nutrition through epigenetics, and the ongoing debate around ultra-processed foods.
- The overall message is that the food and beverage industry is evolving to meet the changing needs and preferences of consumers, with a focus on sustainability, health, and innovation.

Note: This presentation was given as part of the Welsh Government's Insight Conference 2024. A recording of Top 5 Trends from this presentation is available on the Food & Drink Wales Members Area.

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IGD

Importance of Health / How to Succeed with NPD

A presentation from the IGD about the importance of health and strategies for success with NPD (New Product Development).

Key Points of Interest:

- The presentation highlights the importance of a healthier nation and the growing incidences of obesity and non-communicable diseases.
- Evidence shows that 2/3 of UK adults are above a healthy weight, costing the NHS £9.7 billion. Additionally, 45% of consumers prioritize healthy products, and 38% believe changes in mental wellbeing will persist.
- Most shoppers aspire to eat healthier, with 84% expressing this desire.
- Retailers have set targets to increase sales of healthy products, increase the sales tonnage of healthy and better-for-you products, grow private label plant-based products, and increase the proportion of healthy own-brand products.
- The presentation recognizes the competitive nature of retail and acknowledges that the barriers to selling and eating healthier are stronger than the benefits.
- Category forecasts for 2030 show changes in consumption patterns, with increases in oatmeal & oat, pasta, rice, crisps & snacks, and pizza, and decreases in apples, biscuits, peas, salad, cake & pastries, and ice cream.
- There is a need for everyone to contribute to the change towards a healthier nation.
- Retailers are rewarding improvements being made by increasing positives such as functional ingredients, protein, fibre, and reducing negatives such as sugar alternatives, salt alternatives, fat alternatives, adaptogens, and lower kcals & carbs by creating new category space, when driven by shopper demand
- Tips for winning healthier suppliers include no compromise, parallel placement, price parity, increase positives, reduce negatives, no compromise, total cost optimization, parallel placement, price parity, test & refine and marginal gains,.

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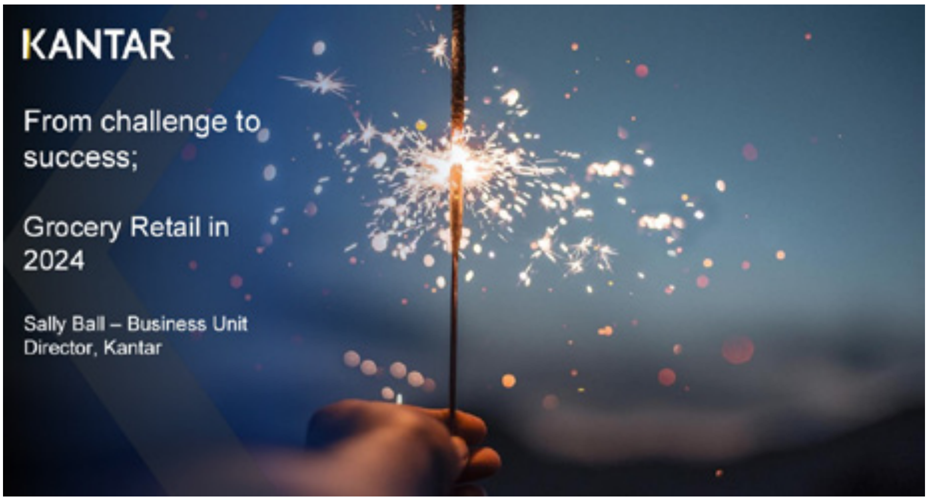
KANTAR WORLDPANEL

Kantar – The Latest in Retail & Shopper Behaviour

An overview of five trends in the grocery retail industry, including falling inflation, changing channel growth, signs of recovery for brands, increasing promotions, and retailers focusing on securing loyalty.



Key Points of Interest:

- The presentation discusses five trends in the grocery retail sector: falling inflation, changing channel growth, increasing promotions, retailers racing to secure loyalty, and brands showing signs of recovery. It highlights the impact of these trends on shoppers, retailers, and brands.
- Charts and diagrams that provide additional insights into the grocery retail sector, such as the number of products matched to Aldi and Lidl, the impact of loyalty schemes on value perception, and the spend change in different product categories.
- Inflation in the grocery retail sector has more than halved in the past 6 months and is expected to be below 4% from April 2024.
- Shoppers have been buying less to balance out the impact of price increases.
- Brands in the grocery sector are showing signs of recovery,
- The general outlook for the grocery retail sector is slowly improving, but there is still a long way to go.
- Discounters had a strong growth period in 2022/23, but their growth has slowed in 2024.
- Bargain stores have increased their store estates, but buyer numbers have not matched last year.
- Retailers are increasingly matching Aldi and Lidl's prices.
- Loyalty schemes are having a tangible impact on value perception and retailers are turning to them for shopper reward.
- The presentation concludes with recommendations to meet the needs of struggling and managing shoppers, upweight promotional trade spend, focus on loyalty schemes, and use the growth of brands to strengthen negotiations with retail buyers.

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IGD

How the Retail Environment is Evolving

Insights into the current and future trends in the UK economy, grocery market, eating out industry, and the European grocery industry. The importance of sustainability, technology, and health are highlighted in these sectors. Additionally, the impact of legislation and policies on the food and packaging industry is discussed.

Key Points of Interest:

UK Economy & Grocery Market Performance:

- Food and drink price levels are normalizing, and most food price inflation is now in the past.
- Food prices have increased by 26% from December 2021 to December 2023, but prices are expected to level off.
- The National Living Wage will increase sharply in April, UK Retail Grocery - How to Navigate in 2024 and beyond:
- The focus for 2024/25 in the retail grocery industry will be on delivering value, elevation, and rewards.
- Sustainability is an overarching strategy for Tesco, focusing on healthy and sustainable diets, food waste, packaging, climate change, and more.
- Sainsbury's has set eight key commitments for 2027, including food volume growth, profit leverage, cost savings, and higher customer satisfaction.
- Morrisons – Strategy: Fix, Rebuild, Grow, and Sustain

Eating Out Trends:

- Eating out sales value is expected to increase over the years, but there may be reduced frequency, penetration, and down-trading in the short term.
- The National Living Wage increase will affect the foodservice industry, where labour costs are a significant portion of expenses.

Europe & Beyond Market Performance & Best in Class Execution:

- Discounters like Lidl and Aldi dominate the European market and are projected to see high growth.
- Six trends shaping the grocery industry in Europe include evolving value, rise of retail media, health at the heart, tech takeover, channel evolution, and positive propositions.

Digital Displays and Case Studies:

- Case studies highlight initiatives in the food industry, such as vending machines for frozen ready meals, fitness-related rewards, and sponsorship of sports teams.
- Initiatives like gamification and plant-based labelling are being used to encourage healthier choices.

Evolution of Legislation and Policy:

- Various countries have introduced legislation and policies related to food and drink, including bans on certain additives, health labelling on alcohol, warnings about caffeine consumption, taxes on ultra-processed foods, and promotion of the plant-based sector.

Key Packaging Legislation:

- The Plastic Packaging Tax aims to incentivize the use of plastic recycled content.
- Collection and packaging reforms are being implemented to address packaging waste.

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FOUR

Who are your key shopper groups and what drives them?

An update on the Key shopper groups and their characteristics, with a focus on food lovers. By analysing interests, brand preferences, shopping behaviour, social media presence, and influencers, businesses can develop effective strategies to engage with target audiences.

Key Points of Interest:

The six attitudinal types identified in the Food & Drink Wales research project are:

1. **Traditionalists:** These individuals value routine and familiarity in their food choices.
2. **Food Lovers:** They prioritize food quality and are likely to seek premium and exclusive experiences.
3. **Healthy Lifestyle:** This group focuses on health and balance in their food choices.
4. **Ethical Eaters:** They prioritize sustainability and are more likely to follow a pescatarian, vegetarian, or vegan diet compared to the national representation.
5. **Adventurers:** These individuals seek unique experiences and are open to trying new and international cuisines.
6. **Busy Lifestyle:** They prioritize speed and convenience in their food choices, often relying on cooking videos for new recipes.

- A chart provides a visual representation and comparison of the different audience segments identified in the Food & Drink Wales research project. It highlights the proportions, characteristics, motivations, market size, and population representation of each segment.
- The presentation shares one persona as an example of the insight available, Sophie a passionate food lover. Sophie shares her culinary exploits online, actively follows food and wine experts, showcasing her commitment to gastronomy, and prefers quality-driven supermarket visits on Saturdays.
- To effectively target food lovers, understanding their preferences is essential. There are several strategies to consider that include use of different media types, content creation, influencer partnerships and incorporating sustainability and ethical practices into brand messaging.
- A guide to strategies on how to foster a strong connection with Sophie and keep her actively involved and loyal describe what her core motivations are, influences, key affinities and core barriers.

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KANTAR WORLDPANEL

How Consumer Eating Habits Have Evolved

An analysis of the changing trends in the out-of-home dining market, including the impact of inflation, consumer behaviour, and the performance of different channels.

Key Points of Interest:

- The Out of Home (OOH) Market has experienced consistent growth as consumers have returned to more stable routines, despite heavy inflation across the market. However, the volume of eating out is still not back to pre-pandemic levels, even though there has been a significant growth in value. Inflation continues to impact OOH prices, but the increased demand drives volume growth.
- In Wales, there has been a slightly slower volume recovery compared to the rest of the UK, with more consumers making more trips but at a higher cost, which has hindered frequency growth. The mix of what people are buying OOH is changing, with a focus on more affordable channels to mitigate rising prices.
- The growth in the OOH market is driven by an increase in the number of channels visited by consumers. Affordable channels have seen the most growth, as financial concerns remain a priority for customers. Grocery Mults have innovated to enhance their performance and drive value.
- QSR (Quick Service Restaurant) is under pressure, with shoppers trading down across OOH channels to manage spending. The competition in the QSR channel is increasing, with new entrants changing the competitive landscape.
- The shift in attitudes towards where people work has affected OOH routines. While there has been a drift back to the office, in-home occasions remain high. Consumers have made changes to save money, such as turning to snacks over lunches out and utilizing cheaper channels.
- Overall, the OOH market has defied expectations and continued to grow in 2023. Consumers have made smart changes to their eating habits to save money without sacrificing enjoyment. Practical and cheap channels have benefited from this trend. However, the impact of the cost-of-living crisis still affects consumer behaviour.
- Looking ahead, as inflation falls and other pressures on income ease, consumers are still cautious and won't rush back to the most expensive options. Health benefits are growing in importance, and delivery services will need to adapt to capture growth again.

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CGA

On Trade Market Dynamics and Trends

Insights into the changing dynamics and trends in the on-trade market. The document highlights the impact of Covid on the on-trade market, changes in consumer behaviour and spending patterns, and the importance of experience and value for money in the sector.

Key Points of Interest:

- Over the last 20 years, there has been a decrease in the number of licensed premises, with a steeper drop since the start of the Covid pandemic. Towns have experienced a decline while cities have thrived.
- Coastal towns have been particularly impacted by the pandemic, with a 13% average site decline compared to pre-Covid levels.
- Nightclubs, casual dining restaurants, and restaurants have experienced significant losses in premises, while pubs have fared relatively better.
- Consumers are spending more on household expenses and holidays, suggesting a shift in priorities.
- Younger, higher-earning consumers living in city/town centres are more likely to go out frequently.
- The majority of consumers predict that they will maintain their current visit frequency to hospitality venues, but Gen Z is a key group to watch for an increase in going out.
- Concerns about the cost of living crisis and increased food and drink prices are affecting visit frequency.
- Despite cost concerns, consumers plan to prioritize spending in the on-premises sector, especially for special occasions.
- There is a shift in visit times, with earlier day parts growing at the expense of late evening visits.
- Bars and nightclubs have experienced a decline in sales, while pubs have seen an increase. Food pubs have performed the best.
- Experience-led concepts and competitive socializing are expected to thrive in the next 12 months.
- Consumers prioritize the quality of the establishment and drinks when going out and consider value for money beyond just the price.
- Spirits have brought down the overall drinks performance, while other categories remain flat or show value growth. Consumers are choosing cheaper options like soft and no/low drinks due to the rising cost of living.
- Among younger demographics, spirits are losing drinkers, while beer is gaining popularity among the 25-44 age group.
- Consumers generally prefer smaller amounts of premium drinks over larger amounts of lower quality drinks.
- The spirits category is facing challenges in countering Long Afternoon Drinking (LAD) in earlier dayparts and is struggling to bridge the gap.
- Despite tough trading conditions, there are reasons for optimism, and the rising cost of living does not deter key consumer groups who still demand great experiences. LAD is the big winner, aided by cost-of-living behaviours.

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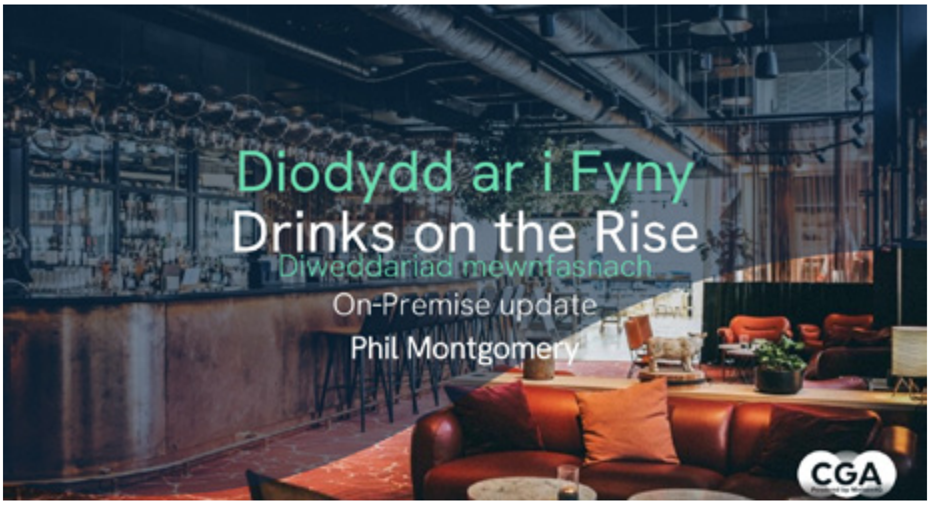
CGA PRESENTATION: 2023

Drinks on the Rise: On premise update

An update from CGA on the Out of Home Drinks market in Wales and GB. This presentation explores emerging on-trade macro trends, an update on the on-premise drinks industry, spending priorities, and changes in consumer behaviour.



Key Points of Interest:

- Visits to on-premise establishments have remained fairly consistent over the past 8 months, with over 9 out of 10 consumers still going out at least once a month.
- On-premise remains the most important spending priority for consumers, even with rising costs.
- Consumers are choosing to cut back on the number of drinks they have when they go out, rather than changing the quality of the venue or drinks.
- Working from home has become a permanent way of life for many on-premise users.
- Friday has seen a decrease in on-premise visits, likely due to the increase in hybrid and remote working.
- Experience-led concepts and competitive socializing are key targets for brand building activity.
- Beer is the category with the largest share growth, followed by cider and stout.
- Spirits, particularly gin and non-cream liqueurs, have seen a decline in share.
- Cocktails have seen a rise in value sales over the past 12 months.
- Cola is driving share growth in the soft drinks category, while mixers and energy drinks are losing share.
- Consumers are prioritizing healthier food and drink choices when eating and drinking out.
- No/Low alcohol beverages are growing in value sales.
- White wine is the most popular wine category, followed by sparkling and rose.
- Overall, the main takeaways are the importance of experience, adapting to changing occasions and locations, the impact of working from home, the rise of beer and cola, and the focus on health and sustainability.

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IGD PRESENTATION: 2023

Retailer Snapshots 1

An update from IGD on Tesco, Sainsbury's and Asda. This snapshot presentation outlines retailer strategic priorities, including key considerations for suppliers dealing with each retailer.

Key Points of Interest:

- General advice for suppliers when preparing for engaging with retailers – prepare well and do your research beforehand to have meaningful and productive conversations.
- Tesco remain committed to the 4 strategic priorities as set out in their 2021 strategy, with a strong focus on offering value for money, great quality, convenience and rewarding loyalty.
- Sustainability is a big focus for Tesco who has brought forward its own operation Net Zero target to 2035, to be in line with the UK Government.
- Health and innovation are important, helping shoppers lead healthier lifestyles across all its markets.
- Outline of supplier considerations in dealing with Tesco including being prepared for aligning with Tesco's strategy, preparing for private label growth and focusing on health and sustainability.
- Sainsbury's strategic priorities – putting food first, brands that deliver, customer service, save to invest, with environmental and social sustainability at their core.
- Outline of supplier considerations in dealing with Sainsbury's including how to benefit from the drive for product innovation by exploring new private label lines, ensuring inclusion in new store formatting, online product optimisation and engaging with sustainability goals.
- Asda strategic priorities – making desirable products affordable via price, promotions and loyalty, being accessible to all, delivering on making shopping an enjoyable experience.
- Outline of supplier considerations in dealing with Asda including leveraging Asda resources to drive brand awareness, focusing in on sustainability, working in partnership with Asda to accelate growth.
- Summary of Tesco, Sainsbury and Asda key numbers

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IGD PRESENTATION: 2023

Retailer Snapshots Lidl, Aldi & Co-op

An update from IGD on Lidl, Aldi and Co-op. This snapshot presentation outlines retailer strategic priorities, including key considerations for suppliers dealing with each retailer.

Key Points of Interest:

- General advice for suppliers when preparing for engaging with retailers – prepare well and do your research beforehand in order to have meaningful and productive conversations.
- Lidl – new store openings halved in 2023, but sales are still growing with $2.9bn forecast 2022 – 2027. Investments in British food & customer loyalty scheme is key to this growth.
- Lidl strategic priorities – be a sustainability champion, remain a value leader through efficient operations, showcasing value, affordable sustainability and personalisation, future proofing their network and increasing its SKU's to better align with local shoppers needs.
- Outline of supplier considerations in dealing with Lidl include considering Lidl as a serious strategic partner for growth, look at improving sustainability credentials for your brand, consider promotional opportunities to enhance customer loyalty.
- Aldi strategic priorities – growth will be achieved by new store openings, evolving its 'one store fits all model,' investing in its proposition, maintaining its low-price credentials and accelerating its online transformation.
- Outline of supplier considerations in dealing with Aldi including identifying relevant products to allow for more assortment in store, continue to deliver value and innovate to help your negotiations and align with sustainability goals.

Links to other relevant reports:

Kantar Report: Out of Home State of the Nation: What You Need to Think About to Thrive (2023)

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IGD PRESENTATION: 2023

Retailer Snapshots 3

An update from IGD on Morrisons, M&S, Ocado and. This snapshot presentation outlines retailer strategic priorities, including key considerations for suppliers dealing with each retailer.

Key Points of Interest:

- General advice for suppliers when preparing for engaging with retailers – prepare well and do your research beforehand in order to have meaningful and productive conversations.
- Morrison's now have 1,661 stores (including McColl's) with achieving +2.2% year-on-year growth.
- Morrison's strategic priorities are guided by its 'Fix, Rebuild, Grow, Sustain' Strategy - its overarching aim is to build a brand that is popular and accessible, with a key focus of sustainability, whilst focusing on becoming more competitive, delivering good value & quality and improving brand recognition.
- Outline of supplier considerations in dealing with Morrison's include keeping supplier costs down, involvement in the new loyalty programme, and being well-prepared to seize growth opportunities in new Morrison's Daily convenience sites and developments in wholesale.
- Ocado – growth of 13% Y-O-Y with 940,000 active customers and an increase in average order size of 8.5% to £118.
- Ocado plan to open large sites over the coming years to add further capacity and drive growth.
- Digitization and innovation are a key focus, ensuring they continue to scale and grow at pace whilst they remain committed to focusing on price, promotions, and loyalty.
- Outline of supplier considerations in dealing with Ocado include familiarisation with Ocado's Smart Platform's supply chain, being prepared to be challenged over costs to aid future growth and helping with driving efficiency.
- M&S – achieved 8.7% food growth / £7.2bn food revenue.
- Focus on everyday value rather than a 'good, better, best' tiered range, significant reduction in promotions due to the M&S 'Sparks' loyalty scheme app.
- Strategic priorities include remaining a trusted brand by driving quality & innovation, leading in Omnichannel including Ocado and improving operating margins.

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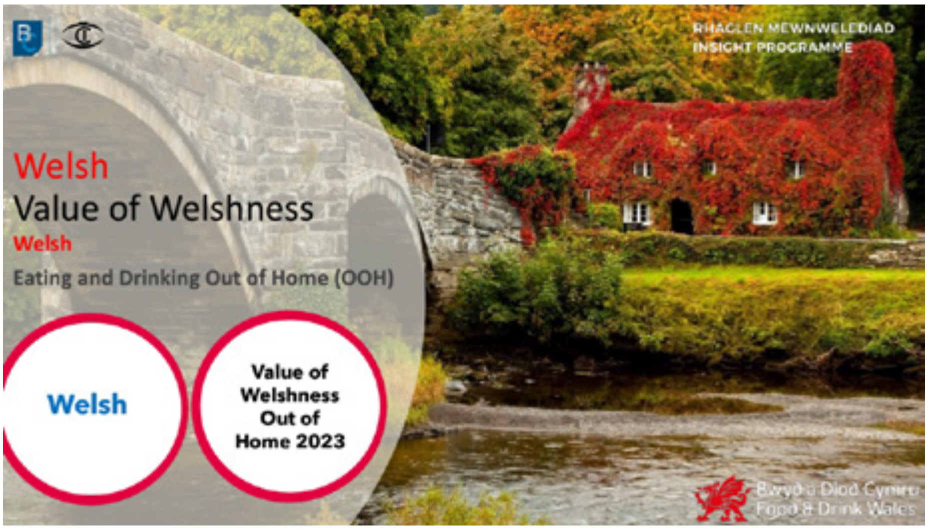
FOOD & DRINK WALES INSIGHT PROGRAMME

Value of Welshness 6
Eating and Drinking Out of Home 2023

The Value of Welshness Out of Home 2023 report provides insights into the importance of Welsh food and drink (F&D) in the dining and drinking experiences of guests and businesses in Wales. The report is based on two core surveys conducted among guests and trade participants.



Key Points of Interest:

The Value of Welshness Out of Home 2023 report emphasizes the importance of Welsh F&D in the dining and drinking experiences of guests in Wales. It highlights the demand for more Welsh options, the willingness to pay more for Welsh products, and the need for businesses to meet these expectations by stocking and promoting Welsh F&D.

1. Importance of Welsh F&D: The report highlights that 9 out of 10 guests consider it important for venues in Wales to offer a good selection of dishes made with Welsh ingredients. Similarly, 8 out of 10 guests believe that venues should have a good range of Welsh drinks. This indicates that guests value the use of local Welsh ingredients and products in their dining and drinking experiences.

2. Guest Perceptions and Attitudes: The report addresses several questions related to guest perceptions and attitudes towards Welsh F&D. It reveals that 8 out of 10 guests were aware of some Welsh food on the menu when they last ate out. However, the availability of Welsh F&D varied among businesses, with 8 out of 10 stocking Welsh dairy products, but only 1 out of 3 stocking any Welsh seafood.

3. Guest Demand for More Welsh F&D: Half of the guests expressed a desire for more Welsh F&D options. The top categories that guests wanted to see more of were bakery products, dairy, lamb, beef, and jams. Younger guests were more likely to express this desire for more Welsh items on the menu.

4. Importance of Promoting Welsh F&D: The report indicates that guests believe venues should promote Welsh F&D. 9 out of 10 guests agreed that venues should promote Welsh F&D, and 49% of guests supported the use of more Welsh language in venues. However, there is a gap between guest expectations and business practices, as only 6 out of 10 businesses convey Welshness to their customers through the use of Welsh branded products and the Welsh language.

5. Willingness to Pay More: The report reveals that guests are willing to pay more for Welsh F&D. 4 out of 10 guests said they would pay an average of £2.80 more for Welsh dishes, and 1 out of 3 guests would pay an average of £1.10 more for Welsh drinks. This indicates that guests recognize the value and quality associated with Welsh F&D.

6. Barriers for Businesses: The report identifies several barriers that prevent businesses from stocking more Welsh F&D. The main barriers include the lack of availability of Welsh products from wholesalers, high costs, and the inability to source the required produce from Wales. These barriers highlight the challenges faced by businesses in meeting the

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FOOD & DRINK WALES

Value of Welshness 6 – Eating & Drinking Out of Home

Latest in-depth research to assess consumer and business attitudes to Welsh food and drink – including Out of Home 2023

Key Points of Interest:

The Value of Welshness Research Programme is a six-year series of research conducted to understand customers' and businesses' attitudes towards Welsh food and drink. The research started in 2017 with a survey of Welsh shoppers, which showed a strong preference for food and drink from Wales. Subsequent research aimed to understand shoppers' emotional responses when shopping and their associations with Wales.

The latest research in 2023 focused on the out of home market and found that there is a strong demand for Welshness among guests and businesses.

In the retail market, Welsh shoppers have a strong preference for Welsh food and drink products, with 8 out of 10 shoppers choosing Welsh products when given a like-for-like choice. More than half of Welsh shoppers would be willing to pay more for Welsh products. Retailers are also recognizing the importance of stocking Welsh products, with more than half of Welsh shoppers agreeing that their usual retailer has a good selection of Welsh food and drink products.

In the out of home market, guests consider it important for venues to offer a good selection of dishes with Welsh ingredients, and half of the guests would like to see more Welsh items on menus. The availability of Welsh food and drink is a top reason for venue choice for 1 in 5 guests. Guests are willing to pay more for dishes made with Welsh ingredients.

Summary of charts in the report:

The 'Guest Need' Gap
This chart shows that 9 out of 10 guests think it's important for venues to have a good range of dishes with Welsh ingredients, while only 2 out of 3 businesses think it's important to have a good selection of Welsh food and drinks. This highlights a gap between what guests want and what businesses think, indicating that Welsh food and drink is more important to guests than businesses realize.

Guests Recalling the Extent of Welsh Ingredients on Menus By Venue, 2023
This chart shows the percentage of guests who recall the extent of Welsh ingredients on menus at different types of venues. It indicates that restaurants and gastro pubs have a higher prevalence of Welsh ingredients on menus compared to bars and pubs, leisure and visitor attractions, bakery and sandwich shops, coffee shops, casual dining restaurants, and fast food outlets.

Proportion of guests rating factors important to venue selection when eating out
This chart shows the factors that guests consider important when choosing a venue to eat out. It indicates that the most important factors are good hygiene, value for money, fresh food, high cooking standards, and use of quality ingredients.

Proportion of guests rating as Top 5 reason to select venue when eating out
This chart shows the top 5 reasons selected by guests for choosing a venue when eating out. It indicates that 1 in 5 guests selected the availability of Welsh ingredients and alcohol brands as a top 5 reason for venue choice, ranking higher than healthy options or promotional deals.

Proportion of guests rating factors important to venue selection when drinking out
This chart shows the factors that guests consider important when choosing a venue to drink out. It indicates that the most important factors are friendly service, good hygiene standards, the look and feel of the venue, a relaxed atmosphere, and value for money.

Proportion of guests rating as Top 5 reason to select venue when drinking out
This chart shows the top 5 reasons selected by guests for choosing a venue when drinking out. It indicates that more guests put local/Welsh alcohol brands in their top 5 when choosing a venue to go out for a drink than national alcohol brands.

Which Icons Convey Welshness?
This chart shows the percentage of Welsh shoppers and English shoppers who consider different icons to convey Welshness. It indicates that the Welsh dragon is the most compelling icon for conveying Welshness, followed by the Welsh language and place names.

Does seeing 'Welshness' on the pack make you any more likely to buy these products?
This chart shows the net positive score for Welsh shoppers and English shoppers when asked if seeing 'Welshness' on the pack makes them more likely to buy the products. It indicates that a majority of Welsh shoppers and a significant portion of English shoppers are more likely to buy products with 'Welshness' on the pack.

Proportion of Welsh shoppers rating factors important to retailer selection
This chart shows the factors that Welsh shoppers consider important when selecting a retailer. It indicates that the most important factors are a great range of fresh produce, a great range of fresh meat, a great range of healthy products and brands, and support for Welsh farming with a good range of Welsh meat, dairy, and produce.

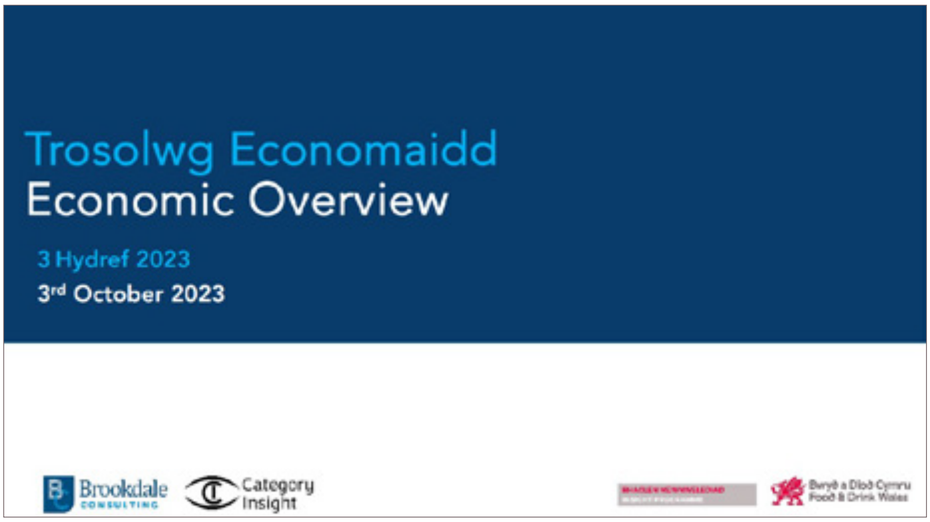
Proportion of Welsh shoppers rating as Top 5 reason to select retailer
This chart shows the top 5 reasons selected by Welsh shoppers for choosing their main shop retailer. It indicates that stocking a good range of Welsh meat, dairy, and produce is ranked higher than having a great range of own-label products.

Overall, the research emphasizes the value of Welshness in driving consumer preferences and presents opportunities for venues, producers, and retailers to meet the demand for Welsh food and drink products to drive sales and increase customer loyalty.

FOOD & DRINK WALES INSIGHT PROGRAMME

Economic Outlook and Shopper Behaviour Impact – October 2023

An economic overview from Food & Drink Wales Insight Programme, focusing on market trends in the food and drink sector. This presentation provides a summary on the impact of inflation and the cost of living on the wider food and drink supply chain for Wales and GB, while considering shopper behaviour.



Key Points of Interest:

Charts showing the good news in the economy – UK inflation has dropped sharply due to falling energy prices, unemployment and redundancies remain historically low, business confidence is up and economic recovery post-COVID is better than expected.

An overview of factors with uncertainty in the current economic situation – including substantial rises in interest rates, UK unemployment although low is starting to rise and consumer and business confidence is still recovering from Brexit, Covid and the Ukraine crisis.

Future emerging threats from the food supply chain include high food inflation, weak availability concerns and geo-political threats and climate change.

Welsh food and drink businesses are still facing the same pressures as last year – including low labour availability and high energy costs however are now also faced with higher borrowing costs due to interest rate rises.

Charts on change in spend by supermarket showing grocery growth vs last year, with bargain stores ahead of Aldi & Lidl.

Changes in spend by category showing the fastest growing and declining categories, with declining sales in ice cream, prepared salads and bottle drinks, and growth in soups, highlighting the poor summer weather.

Grocery price inflation peaked at a 40-year high at 19.1% in March 2023, with a chart illustrating the highest and lowest category risers.

Showing an understanding of pressures on consumers and supporting their key needs will help win with their shopping choices.

Summary of how Welsh consumers are coping with the cost-of-living crisis, with a focus on Class D consumers.

Links to other relevant reports:

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FOOD & DRINK WALES INSIGHT PROGRAMME

Value of Welshness

: Insights into the perceptions and preferences of shoppers in the USA and Japan regarding Welsh food and drink products.

KEY INSIGHTS:

1. Shoppers in the USA:

- 9 out of 10 shoppers from the USA are aware of some food and drink products from Wales, with the highest awareness for Welsh meat, dairy, and bakery goods.
- Welsh Dairy is the top category that US shoppers buy.
- The Welsh flag is associated with good quality food products, comparable to the perception of GB.
- Shoppers in the USA value price, brand range, and product quality when choosing their main grocery store.
- The majority of US shoppers rate quality and branded food and drink highly.
- In terms of influencing factors, US shoppers are mostly influenced by seeing products in-store or recommendations.
- The Welsh flag, Welsh language, and Welsh lamb are associated with Wales by US shoppers.
- Half of the shoppers see Welsh food and drink as artisanal, great tasting, and reflecting Welsh culture.
- The top reasons for store choice in the USA include low prices, a wide range of brands, and excellent product quality.
- Welsh food and drink outperform Brand GB on most shopper perception measures.
- 7 out of 10 US shoppers think Welsh food tastes great, and nearly 4 out of 10 think it is more trustworthy.

2. Shoppers in Japan:

- 9 out of 10 shoppers from Japan are aware of some food and drink products from Wales, with the highest awareness for Welsh whisky, meat, and beers.
- Welsh whisky and beer are among the top categories that shoppers in Japan buy.

- The Welsh flag is associated with good quality food products, comparable to the perception of GB, while Scotland is slightly higher.
- Shoppers in Japan value price, value range, and product quality when choosing their main grocery store.
- The majority of Japanese shoppers' rate characteristics associated with Welsh food and drink highly.
- In terms of influencing factors, Japanese shoppers are mostly influenced by seeing products in stores.
- The Welsh flag, Welsh language, and Welsh lamb are associated with Wales by Japanese shoppers.
- Japanese shoppers see Welsh food and drink as a reflection of Welsh culture, natural, and artisanal.
- The top reasons for store choice in Japan include low prices, great tasting products, and a wide range of brands.
- Welsh food and drink outperform Brand GB on most shopper perception measures.
- 4 out of 10 Japanese shoppers think Welsh food tastes great, and nearly 4 out of 10 think it is more trustworthy.

Key Recommendations for Welsh Businesses:

- Target the right retailers for your brand based on shopper preferences and perceptions.
- Use key shopper insights in your presentation to retailers.
- Understand the shopper profiles and what is important to them in each country.
- Highlight the trust credentials and quality of Welsh food and drink products.
- Raise awareness of Welshness through packaging and communication.
- Consider the specific preferences and characteristics of each country's shoppers when developing new products.
- Leverage the positive associations of the Welsh flag, Welsh language, and Welsh lamb in marketing and branding efforts.
- Emphasize the artisanal, great tasting, and cultural aspects of Welsh food and drink products.
- Continuously monitor and adapt to evolving shopper behaviours and preferences in both countries.

FOUR AGENCY

Who are your key shopper groups and what drives them?

This cutting-edge shopper segmentation based on attitude will help businesses gain a deeper understanding of their target customers, how to refine their communication plans and optimise their trade discussions. This presentation provides and insight into the key shopper groups and their motivations, focusing on the Food Lovers segment.

Key findings:

Six attitudinal types of shoppers identified: Traditionalists, Healthy Lifestyle, Food Lovers, Ethical Eaters, Busy Lifestyle, and Adventurers.

- Adventurers: market size is 7.6 million in the UK and 345,000 in Wales. They make up 15% of the population in the UK and 13% in Wales.
- Busy Lifestyle: market size is 8.8 million in the UK and 409,000 in Wales. They make up 17% of the population in the UK and 15% in Wales.
- Ethical Eaters: market size is 9.3 million in the UK and 505,000 in Wales. They make up 18% of the population in the UK and 19% in Wales.
- Food Lovers: market size is 6.9 million in the UK and 316,000 in Wales. They make up 13% of the population in the UK and 12% in Wales.
- Healthy Lifestyle: market size is 13.7 million in the UK and 523,000 in Wales. They make up 26% of the population in the UK and 19% in Wales.
- Traditionalists: market size is 12.8 million in the UK and 695,000 in Wales. They make up 24% of the population in the UK and 26% in Wales.

A comparison of attitudinal segments provides information on the different shopper groups identified. It shows the core drivers that motivate each segment, such as unique experiences, speed and convenience, sustainability, food quality, and health and balance.

The focus of the presentation is the Food Lovers segment which has a market size of 6.9 million in the UK and 316,000 on Wales. They are primarily female (53%) and 18% of them live in London. Food Lovers are dedicated foodies who enjoy creating impressive dishes and exploring new food experiences.

To reach food lovers with concentrated marketing efforts, consider a multi-channel approach that combines traditional media, digital marketing, social media engagement, and strategic partnerships that can help effectively reach this segment.

To use the shopper segmentation data in marketing communications, create targeted messages and campaigns that appeal to the key shopper group.

Links to other relevant reports:

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CGA

CGA – Cost of Living Consumer Pulse

This report from CGA explores market contexts and changing habits of UK on-premise consumers, alongside the impact of the Cost of Living crisis.

Key findings:

The presentation is about the CGA Cost of Living Consumer Pulse survey conducted in December 2023 in the UK and Ireland, which examines the impact of the cost-of-living crisis on consumers' spending habits and frequency of visits to on-premise establishments.

The Cost-of-Living crisis is impacting consumers across the UK and Ireland, with 9 out of 10 consumers reporting an impact.

On Premise visitation has increased in December, with fewer consumers visiting less often and more consumers increasing their visit frequency compared to the previous month.

Cost of living and inflationary concerns are causing 28% of consumers to reduce their frequency of visits to On Premise.

27% of consumers are reducing their spend per visit, primarily due to cost-of-living concerns.

Some consumers are spending more per visit, with rising food and drink prices being a key factor.

Gen Z consumers are more optimistic about visiting On Premise in the next 3 months, with 42% anticipating increased visitation.

On Trade visits remain a high priority for consumers, especially for special occasions.

Just under a third of consumers expect to spend more on eating and drinking out in January.

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KANTAR

Economic Subsector Report 2023

Market trends for Grocery and the DEFRA Categories across GB and Wales
Reporting data to 24th December 2023

Key findings:

The grocery sectors in Wales and GB have seen a mix of growth and decline in both value and volume. Price inflation has been a key driver of growth, while some sectors have outperformed the market and others have declined. The performance of retailers varies, with some making significant gains and others experiencing slower growth.

The sectors that are driving the growth in GB are:

1. Chilled Prepared Fish
2. Frozen Fish
3. Ambient Flavoured Milk
4. Cheese
5. Yoghurt
6. Cooking Oils
7. Suet
8. Dog Food
9. Cat+Dog Treats
10. Fish Foods

These sectors have seen positive year-on-year spend change and are contributing to the overall growth in the GB market.

Summary of each grocery sector, including statistics:

1. Total Grocery:

- Total Grocery spend in GB increased by £12,057.9 million (+9.1%) to reach £144,264.9 million.
- The volume of grocery declined by 1,798,180 kg (-2.4%) to reach 73,817,940 kg.
- The main contributor to the growth in Total GB grocery was price driven by inflation.
- The frequency of grocery trips increased by 3.50 trips (+1.4%) to reach 257.47 trips.

2. Fish and Seafood:

- Fish and Seafood sales in Wales grew by £524.6 million (+8.2%) to reach £6,946.4 million.
- Wales accounts for 4.4% of Total GB's £3.4 billion in Fish and Seafood sales.
- The volume of Fish and Seafood declined by 95,367 kg (-2.6%) in Wales.
- The largest sector in Wales remains Frozen Fish, which has continued to grow its share year on year.

3. Beverages:

- Beverage's sales in Wales grew by £1.0 billion (+1.0%) to reach £1.2 billion.
- Wales accounts for 5.2% of Total GB's £22.1 billion in Beverages sales.
- The volume of Beverages declined by 10% in Wales.
- Wine and spirits have been in decline, whereas beer and lager have grown year on year.

4. Bakery:

- Bakery sales in Wales grew by £66.3 million (+12.1%) to reach £583 million.
- Wales accounts for 4.6% of Total GB's £12.7 billion in Bakery sales.
- The volume of Bakery declined in Wales.
- The largest sector in Wales remains Morning Goods, which has continued to grow its share year on year.

5. Cereals, Grains, and Pulses:

- Cereals, Grains, and Pulses sales in Wales grew by £42.8 million (+11.8%) to reach £408 million.
- Wales accounts for 4.4% of Total GB's £8.6 billion in Cereals, Grains, and Pulses sales.
- The volume of Cereals, Grains, and Pulses declined in Wales.
- The share of Breakfast Cereals has decreased, whereas Crisps and Frozen Pizza have seen gains.

6. Fruit and Vegetables:

- Fruit and Vegetables sales in Wales grew by £55.3 million (+7.9%) to reach £753 million.
- Wales accounts for 4.4% of Total GB's £17 billion in Fruit and Vegetables sales.
- The volume of Fruit and Vegetables declined in Wales.
- The share of vegetables has increased, but fruit has declined.

7. Meat and Meat Products:

- Meat and Meat Products sales in Wales grew by £67.8 million (+7.4%) to reach £988 million.
- Wales accounts for 4.8% of Total GB's £20.4 billion in Meat and Meat Products sales.
- The volume of Meat and Meat Products declined in Wales.
- Chilled Ready Meals have continued to grow year on year.

KANTAR: ECONOMIC SUBSECTOR REPORT 2023 Continued

8. Oils and Fats:
- Oils and Fats sales in Wales grew by £5.4 million (+4.7%) to reach £123 million.
- Wales accounts for 5.1% of Total GB's £2.4 billion in Oils and Fats sales.
- The volume of Oils and Fats declined in Wales.
- Cooking oils have grown the fastest in Wales.

9. Dairy and Dairy Products:
- Dairy and Dairy Products sales in Wales grew by £52.8 million (+9.2%) to reach £613 million.
- Wales accounts for 4.6% of Total GB's £13.3 billion in Dairy and Dairy Products sales.
- The volume of Dairy and Dairy Products declined in Wales.
- The core products, such as Milk and Cheese, are relatively flat year on year.

10. Animal Feed:
- Animal Feed sales in Wales grew by £21.6 million (+12.0%) to reach £202 million.
- Wales accounts for 6.3% of Total GB's £3.2 billion in Animal Feed sales.
- The volume of Animal Feed declined in Wales.
- Treats performed the best year on year in Wales.

Retailer chart shows the market share of different grocery retailers in GB and Wales.

In GB, the top 5 retailers are Tesco, Sainsbury's, Asda, Aldi, and Morrisons. Tesco has the largest market share, followed by Sainsbury's and Asda.

In Wales, the top 5 retailers are Tesco, Asda, Sainsbury's, Morrisons, and The Co-Operative. Tesco also has the largest market share in Wales, followed by Asda and Sainsbury's.

The Discounters (Aldi and Lidl) have seen the most growth in both GB and Wales, with Aldi seeing the biggest gains.

M&S and Sainsbury's have also driven growth in the grocery market in both GB and Wales.

The Co-Operative is the only retailer that has declined in both GB and Wales.

Overall, all retailers have grown year on year in both GB and Wales, except for The Co-Operative.

CGA PRESENTATION: 2023

Drinks State of the Nation: Understanding the Changing Hospitality Environment

An update from CGA on the Out of Home Drinks market in Wales and GB. This presentation considers remaining market pressures alongside potential opportunities.

Key Points of Interest:

- Charts on market context – total outlets in Wales in 2022 down 4.2% on 2021
- Statistics on business profitability – 3 in 10 businesses made a greater profit in 2022 than pre-pandemic in 2019
- Investment is returning to the sector – deals are being made and planned
- Top 3 concerns business leaders – energy costs, food and drink cost inflation and the cost of living crisis for consumers
- Statistics on consumer behaviour – drop in spending on eating and drinking out
- Profile of consumers - showing higher income households visiting sector more frequently
- Cost of living crisis and inflationary concerns driving consumers planned reduction in visits
- Statistics showing main occasions for on trade visits – visits have become more casual and relaxed and early evenings picking up in popularity
- Charts showing the performance of beers and cider, wine and sparkling and soft drinks
- Conclusions on opportunities in the on trade – premiumisation and quality key

Note: This presentation was given as part of the Welsh Government's Insight Conference 2023. A recording of this presentation is available on the Food & Drink Wales Members Area.

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Kantar Report: Our Nation Out of Home (2022)

Insight Programme Report: Out of Home Update (2022)

Kantar Presentation: Out of Home State of the Nation (2022)

CGA Presentation: Drinks State of the Nation: What You Need to Think About (2022)

CGA Report: On-Trade Drinks Performance and Trends (2021)

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Food & Drink Wales

KANTAR PRESENTATION: 2023

Out of Home State of the Nation: What You Need to Think About to Thrive

An update from Kantar on the Out of Home market. This presentation focuses on the shift in occasions and consumer sentiment and considers the impact of working from home and the cost-of-living crisis.

Key Points of Interest:

- Charts showing market performance context – spend in core Out of Home markets in 2022 remains below 2020 levels with a movement to In Home
- Out of Home market has grown faster than Take Home with increased footfall and frequency despite inflationary and cost of living pressures
- Key take aways for food and drink businesses based on Out of Home market performance
- Charts showing trip occasions – working from home still impacting Out of Home trip during the working week
- Shoppers are returning to dine-in experiences – delivery occasions have decreased post-pandemic
- Key take aways for food and drink businesses on positioning their offer to meet changing needs of shoppers
- Only 30% of consumers in Out of Home are in a comfortable financial position as inflationary pressures are impacting upon consumer behaviour
- Younger consumers are favouring cheaper outlets, but all consumers are switching spend to more expensive outlets as treat occasions gain share over everyday occasions
- Key take aways for promoting the benefits of Out of Home to justify the price premium

Note: This presentation was given as part of the Welsh Government's Insight Conference 2023. A recording of this presentation is available on the Food & Drink Wales Members Area.Drink Wales Members Area.

Links to other relevant reports:

CGA Presentation: Drinks State of the Nation: Understanding the Changing Hospitality Environment (2023)

Kantar Report: Our Nation Out of Home (2022)

Insight Programme Report: Out of Home Update (2022)

Kantar Presentation: Out of Home State of the Nation (2022)

CGA Presentation: Drinks State of the Nation: What You Need to Think About (2022)

CGA Report: On-Trade Drinks Performance and Trends (2021)

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Food & Drink Wales

INSIGHT PROGRAMME PRESENTATION: 2023

Value of Welshness: Retail Highlights

Highlights of the Value of Welshness Retail 2022 research, from the Insight Programme.

Key Points of Interest:

- Local provenance – 78% of shoppers in Scotland and Wales see buying food and drink with local provenance as important
- 8/10 Welsh shoppers would prefer to buy Welsh products in top grocery items
- More than half of shoppers would be willing to pay a price premium for Welsh products
- 2/3 Welsh shoppers would like to see more Welsh products in stores
- Charts on factors determining choice of store for grocery shopping
- 8/10 shoppers say it is important for their retailer to have a good range of Welsh meat, dairy and produce
- 3/4 shoppers say it is important for their retailer to have a great range of Welsh brands
- Affinity to Wales – 1 in 5 English shoppers feel partly Welsh
- Opportunities for retailers and food and drink businesses to drive Welsh products

Note: This presentation was given as part of the Welsh Government's Insight Conference 2023. A recording of this presentation is available on the Food & Drink Wales Members Area.

Links to other relevant reports:

Insight Programme Report: Value of Welshness – Retail (2022)

Insight Programme Presentation: Value of Welshness: Out of Home Highlights (2021)

Insight Programme Report: Value of Welshness 4

Insight Programme Presentation: Sustainability and Welshness (2021)

Insight Programme Report: Value of Welshness (2020)

Bwyd a Diod Cymru
Food & Drink Wales

IGD PRESENTATION: 2023

How to Thrive in the Changing Retail Environment

This presentation from IGD explores the changing UK grocery environment – including the new value equation, the impact of HFSS regulations instore, and overall outlook.

Key Points of Interest:

- Information on the new value equation driving change in UK grocery – current focus is on price rather than elevation
- Front end changing – moves to increase self checkouts and apps to reduce labour costs
- Examples from across the world on new look and feel for grocery stores
- Evolution of loyalty schemes and moves for customers to pay for loyalty schemes in order to save
- Opportunity for loyalty schemes to help with several aspects of the value equation
- Opportunities beyond the obvious targets – look to 'non-grocery grocers'
- Evidence of HFSS impact – promotional end of aisles changing, in-aisle brand blocking
- HFSS outlook – impact on certain brands, but still opportunities available

Note: This presentation was given as part of the Welsh Government's Insight Conference 2023. A recording of this presentation is available on the Food & Drink Wales Members Area.

Links to other relevant reports:

Kantar Presentation: Retail State of the Nation: What You Need to Think About to Thrive (2023)

IGD Presentation: Understanding Europe's Top Retailers and What They Require (2023)

Kantar Presentation: State of the Nation Major Update: How Consumption is Changing in the Home (2023)

Kantar Presentation: Retail State of the Nation: What You Need to Think About in 2022 (2022)

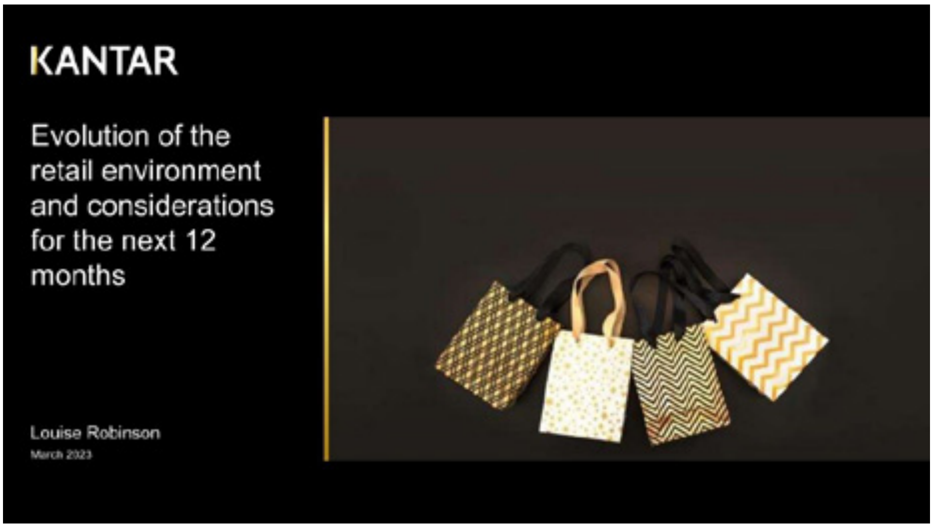
IGD Presentation: European Retail Outlook (2021)

Bwyd a Diod Cymru
Food & Drink Wales

KANTAR PRESENTATION: 2023

Retail State of the Nation: What You Need to Think About to Thrive

This presentation from IGD explores the changing UK grocery environment – including the new An overview of the retail market performance from Kantar, including the implications of high inflation on shopper behaviours alongside other key factors.



Key Points of Interest:

- Shoppers are making smaller average trips, but this is being offset by huge price increases
- Volume and value data indicate that own label value products are up in volume
- Charts on promotions – record low level of promotion recorded in early 2023
- Two thirds of consumers are very concerned about the rising cost of groceries
- Inflation is not the only factor influencing consumer behaviour
- Outline of coping strategies employed by shoppers in response to grocery price increases – buying cheaper not less for now
- Charts on sustainability consumer segments – Eco Actives in decline
- Welsh shoppers more likely to buy local products and seek products with health benefits
- Shoppers less aware of individual price rises, but feel pressure on their total basket
- Opportunity to shift value perception – subtle moves in positioning, price and packaging

Note: This presentation was given as part of the Welsh Government's Insight Conference 2023. A recording of this presentation is available on the Food & Drink Wales Members Area.

Links to other relevant reports:

IGD Presentation: How to Thrive in the Changing Retail Environment (2023)

IGD Presentation: Understanding Europe's Top Retailers and What They Require (2023)

IGD: UK Retailers' Sustainability Strategies (2022)

Kantar Presentation: Retail State of the Nation: What You Need to Think About in 2022 (2022)

IGD Presentation: European Retail Outlook (2021)

KANTAR PRESENTATION: 2023

State of the Nation Major Update: How Consumption is Changing in the Home

A major update from Kantar on the changing consumption habits in the home. This presentation explores consumers' shifting priorities, and considers the impact of COVID, working from home, and the inflation.

Key Points of Interest:

- Pandemic has changed shoppers' habits – shoppers are buying more food and drink for At Home occasions than Out of Home
- Occasions have shifter as a result of more home-based lives – daytime snacking up 11% since 2019
- Shoppers are seeking convenience – assembled and convenience meals key to providing meal solutions
- Shoppers facing trade-offs At Home as costs increase – returning to low cost basics and easy switches
- Trend towards simpler meals with shorter prep times – low effort and value meals more popular
- Endurance of longer term consumer trends – meat reduction and health motivations continue
- Summary of implications for food and drink businesses

Note: This presentation was given as part of the Welsh Government's Insight Conference 2023. A recording of this presentation is available on the Food & Drink Wales Members Area.

Links to other relevant reports:

Kantar Presentation: Retail State of the Nation: What You Need to Think About to Thrive (2023)

thefoodpeople Presentation: Top Ten Food & Drink Trends 2023/24 (2023)

Insight Programme Presentation: Economic Outlook and Shopper Behaviour Impact (2023)

Kantar Presentation: 5 Observations on Consumer Behaviour (2022)

THEFOODPEOPLE PRESENTATION: 2023

Top Ten Food & Drink Trends 2023/24

A dive into the key future food and drink trends for 2023-2024, from thefoodpeople.

Key Points of Interest:

- 2023-24 trends wheel showing 1 global driver, 4 social and cultural forces, 12 food and beverage mega trends and 64 ways in which these trends will manifest – focus on the 10 top food and drink trends
- Cost of Cooking – cost-of-living crisis encouraging frugality and thrift
- Precious Energy – focus on reducing energy usage and switching to clean energy in producing, transporting and cooking food
- Back to Basics – return to tried and tested methods of regenerative farming and food production
- New Climate New Crops – growers and producers adapting to new climate conditions by switching crops and developing hybrids

Phygital World – taking the best of digital and physical experiences to fit together to create a seamless customer journey

- Precision Fermentation – growing use of microbes to produce proteins to create food substitutes
- Real & Recognisable – consumers favouring minimally processed, 'clean label' foods and natural ingredients
- Mamma Mia – in times of uncertainty, people are returning to the familiarity and comfort of Italian cooking and traditional humble ingredients
- Beige Comforts – budget friendly staples of bread and toast going gourmet
- Perfect Patisserie – affordable luxury of French pastries instead of full meals with flavour and shape innovations

Note: This presentation was given as part of the Welsh Government's Insight Conference 2023. A recording of this presentation is available on the Food & Drink Wales Members Area.

Links to other relevant reports:

Kantar Presentation: Retail State of the Nation: What You Need to Think About to Thrive (2023)

CGA Presentation: Drinks State of the Nation: Understanding the Changing Hospitality Environment (2023)

thefoodpeople Presentation: Top Ten Food & Drink Trends 2023/24 (2023)

thefoodpeople Report: Top No & Low Alcohol Trends (2022)

Kantar Report: Grocery Retail Performance (2022)

Kantar Presentation: 5 Observations on Consumer Behaviour (2022)

thefoodpeople Presentation: Top Ten Food & Drink Trends 2021/21 (2021)

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Food & Drink Wales

IGD PRESENTATION: 2023

Understanding Europe's Top Retailers and What They Require

An overview from IGD of Europe's leading retailers and five trends shaping the European grocery industry. This presentation also highlights key priorities and current strategy for top retailers in Europe.

Key Points of Interest:

- Summary of five key trends shaping the medium-term outlook for grocery retail in Europe
- Delivering better value – communicating and delivering value to shoppers key for many retailers as cost-of-living impacts upon spending power
- Local and seasonal – retailers balancing shopper expectations on health and sustainability against need to cut costs and remove complexity from supply chains
- Channel evolution – retailers reacting and adapting to shoppers' evolving needs to offer a unique shopper experience
- The efficiency imperative – cost pressures leading to streamlining of processes and routines and increased digitisation
- Doing better for the planet – sustainability continuing to shape the retail market across Europe with retailers launching sustainability initiatives
- Forecasts showing outlook for Europe grocery market, the top 20 markets and retailer shares in Europe by 2027
- Graph showing the forecasted channel shares for Europe – discounters, online and convenience are predicted to grow
- Overview of top retailers' priorities and planned areas of investment
- Implications for suppliers of five key trends

Note: This presentation was given as part of the Welsh Government's Insight Conference 2023. A recording of this presentation is available on the Food & Drink Wales Members Area.

Links to other relevant reports:

Kantar Presentation: Retail State of the Nation: What You Need to Think About to Thrive (2023)

IGD Presentation: How to Thrive in the Changing Retail Environment (2023)

Kantar Presentation: Retail State of the Nation: What You Need to Think About in 2022 (2022)

IGD Presentation: European Retail Outlook (2021)

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Food & Drink Wales

INSIGHT PROGRAMME PRESENTATION: 2023

An Economic Overview and its Relevance to Food & Drink SMEs

An overview of the current economic outlook from the Insight Programme, focusing on the implications for food and drink businesses. This economic overview also considers potential opportunities alongside ongoing challenges

Key Points of Interest:

- Charts showing the good news in the current economy – UK unemployment and redundancies remain historically low although vacancies still high resulting in a tight labour market
- An overview of factors with uncertainty in the current economic situation – including drivers of inflation and consumer and business confidence still recovering from Brexit, Covid and Ukraine crisis
- Charts on UK overseas trade – food exports static and services picking up
- Implications of the current economic situation for Welsh food and drink businesses – including production sector issues and exposure to price changes
- Changes in the consumer market – households struggling with cost increases in food, energy and mortgage repayments
- Grocery price inflation – at highest recorded level of 17% with grocery market volume down 8% in Wales on last year and retailer focus on everyday low price
- Summary of key points and potential opportunities for food and drink businesses as working from home shifts behaviours to in-home

Note: This presentation was given as part of the Welsh Government's Insight Conference 2023. A recording of this presentation is available on the Food & Drink Wales Members Area.

Links to other relevant reports:

Insight Programme Presentation: Economic Outlook and Shopper Behaviour Impact (2023)

Kantar Presentation: Retail State of the Nation: What You Need to Think About to Thrive (2023)

Kantar Report: Out of Home State of the Nation: What You Need to Think About to Thrive (2023)

Kantar Presentation: State of the Nation Major Update: How Consumption is Changing in the Home (2023)

Insight Programme Presentation: An Economic Overview (2022)

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Food & Drink Wales

INSIGHT PROGRAMME PRESENTATION: 2023

Economic Outlook and Shopper Behaviour Impact

An economic overview from the Insight Programme, focusing on market trends in the food and drink sector. This presentation provides a summary on Welsh exports and the wider food and drink supply chain for Wales and GB, while considering shopper behaviour in the retail market and OOH.

Key Points of Interest:

- Charts showing overview of Food and Drink sector in Wales – turnover, employment, business units
- Key sector statistics – total food and drink sales in Wales are £9.4bn equivalent to 4.8% of GB and Welsh exports up 24% in 2022 to £800m
- Overview of economic situation – inflation coming down albeit slowly although food inflation much higher, rapid rises in interest rates, labour market shortages and some improvement in business and consumer confidence
- Out of Home foodservice market overview - some recovery post-pandemic with 20% growth in value, but trading conditions remain difficult and outlet numbers in Wales are down 4.5% in 2022 on previous year
- Consumer out of home drink trends – low and no alcohol products are still seeing significant growth from a small base and shift back to large alcoholic drinks
- In Home retail market overview – shoppers are moving to cheaper stores, buying cheaper products and buying less to offset food and drink inflation
- Appendix with detailed charts on key retail product categories in Wales and out of home trends

Links to other relevant reports:

Insight Programme Presentation: An Economic Overview (2023)

Kantar Presentation: Retail State of the Nation: What You Need to Think About to Thrive (2023)

Kantar Report: Out of Home State of the Nation: What You Need to Think About to Thrive (2023)

CGA Presentation: Drinks State of the Nation: Understanding the Changing Hospitality Environment (2023)

Kantar Presentation: Retail State of the Nation: What You Need to Think About to Thrive (2023)

Kantar Presentation: State of the Nation Major Update: How Consumption is Changing in the Home (2023)

thefoodpeople Report: Top No & Low Alcohol Trends (2022)

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IGD: 2022

UK Retailers' Sustainability Strategies

This IGD presentation presents the top 10 UK retailers' sustainability strategies, providing insight into their latest initiatives.

Key Points of Interest:

- Doing good is good business – sustainability targets facilitate cooperation between retailers and suppliers to think about corporate responsibility
- Educating shoppers – retailers' role in raising awareness of how to be more sustainable
- Protecting future resources – need to continually redesign and use recyclable materials
- Fast developing trend – need for retailers and suppliers to understand good practice and keep up to date
- Innovating technology – new, flexible approaches should be considered by retailers and suppliers to remain competitive
- Overview of sustainability initiatives by main UK retailer – including Sainsbury's Plan for Better, Asda's Create Change for Better programme and M&S's Plan A
- Four-point checklist to help inform businesses' sustainability journeys

Links to other relevant reports:

Kantar Presentation: Retail State of the Nation: What You Need to Think About to Thrive (2023)

IGD Presentation: How to Thrive in the Changing Retail Environment (2023)

IGD Presentation: Understanding Europe's Top Retailers and What They Require (2023)

IGD Presentation: Sustainability & Shoppers (2021)

Insight Programme Presentation: Sustainability & Welshness (2021)

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Food & Drink Wales

THEFOODPEOPLE REPORT: 2022

Top No & Low Alcohol Trends

This presentation from thefoodpeople explores the top current trends in no and low alcohol, including examples of innovation in the market.

Key Points of Interest:

- Summary of No & Low Alcohol trends – consumers are re-evaluating their relationship with alcohol for a range of reasons
- Attitudinal shifts – alcohol moderation is becoming more popular than total abstinence and more positive language is emerging in terms such as sober curious and mindful drinking
- Review of alcohol content in most popular products – lot of development in alcohol free and removed wine and light spirits increasing in relevance
- Premiumisation – this can be through ingredients, technique, packaging and awards
- Going back to nature – brands are using plants and botanicals versus synthetic solutions and starting to link to sport and health with reduced sugar and functional claims
- Origins of ingredients – no and low alcohol producers seeking to drive value and price in category through sourcing well and presenting a back story
- Legitimisation – category gaining fashion through how and where the products is consumed with draught beers, pop-up bars, subscription boxes and awards
- Product development – copycats of traditional alcoholic drinks creating an accessible gateway and non-alcoholic adult sodas seeing innovation

Links to other relevant reports:

thefoodpeople Presentation: Top Ten Food & Drink Trends 2023/24 (2023)

CGA Presentation: Drinks State of the Nation: Understanding the Changing Hospitality Environment (2023)

Kantar Report: Out of Home State of the Nation: What You Need to Think About to Thrive (2023)

CGA Report: Moderation in the On-Trade: No & Low Alcohol Insights (2022)

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Food & Drink Wales

CGA REPORT: 2022

No & Low Alcohol in the On-Trade

This report from CGA explores market contexts and changing consumer habits alongside an overview and market size of low and no alcohol in the UK on-trade.

Key Points of Interest:

- Charts on market context – continued market churn post-pandemic, but optimism in sector is gaining strength
- Cost of living pressures – 83% of operators are concerned about food and drink cost inflation and 79% about the impact of the cost of living crisis on consumers
- Consumers are showing resilience and are prioritising on trade spend, seeing going out as an affordable luxury and treat
- Statistics on the No and Low Alcohol market – the category is valued at £38.3m and is growing fast with 42% of GB adult consumers drinking a no or low alcohol alternative in the past year
- Consumer profile – no/low consumers tend to be a younger demographic, are more likely to be female and spend more in the on trade than average consumers
- Overview of priorities for sector – there is little overlap between no and low categories and building a distinct proposition for each no-low category will aid momentum
- Summary of key takeaways from presentation

Links to other relevant reports:

thefoodpeople Report: Top No & Low Alcohol Trends (2022)

CGA Presentation: Drinks State of the Nation: Understanding the Changing Hospitality Environment (2023)

Kantar Report: Out of Home State of the Nation: What You Need to Think About to Thrive (2023)

thefoodpeople Presentation: Top Ten Food & Drink Trends 2023/24 (2023)

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Food & Drink Wales

INSIGHT PROGRAMME REPORT: 2022

Value of Welshness – Retail 2022

The latest instalment of the Insight Programme's Value of Welshness research. This presentation includes new insight into shoppers' desire for Welshness and their perceptions of which retailers are doing Welsh well.

Key Points of Interest:

- Local provenance – 78% of shoppers in Scotland and Wales see buying food and drink with local provenance as important
- 8/10 Welsh shoppers would prefer to buy Welsh products in top grocery items and 97% plan to buy the same or more Welsh products
- More than half of shoppers would be willing to pay a price premium for Welsh products
- Most retailers think that retailers have a good range of Welsh food and drink products and this has increased over the past 2 years
- Charts on factors determining choice of store for grocery shopping
- 8/10 shoppers say it is important for their retailer to have a good range of Welsh meat, dairy and produce
- 3/4 shoppers say it is important for their retailer to have a great range of Welsh brands
- 2/3 Welsh shoppers would like to see more Welsh products in stores
- Affinity to Wales – 1 in 5 English shoppers feel partly Welsh and 1/3 are more likely to buy a product with Welshness on the pack
- Opportunities for retailers and food and drink businesses to drive Welsh products

Links to other relevant reports:

Insight Programme Presentation: Value of Welshness: Retail Highlights (2023)

Insight Programme Presentation: Value of Welshness: Out of Home Highlights (2021)

Insight Programme Report: Value of Welshness 4

Insight Programme Presentation: Sustainability and Welshness (2021)

Insight Programme Report: Value of Welshness (2020)

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IGD PRESENTATION: 2022

Retailer Snapshots 3

An update from IGD on Lidl, Aldi and Iceland. This snapshot presentation outlines retailer strategic priorities, including key considerations for suppliers dealing with each retailer.

Key Points of Interest:

- General advice for suppliers in preparing for engaging with retailers – know all you can know before you engage
- Charts on channel forecasts – share of grocery market 2022 and 2027, CAGR and value of growth by channel
- Lidl strategic priorities – remain a value leader, build a future proof network, better serve shoppers and be a sustainable champion
- Outline of supplier considerations in dealing with Lidl including changes to sourcing as a result of local and sustainable commitments
- Aldi strategic priorities – reinforce its low-price proposition, evolve the store model, create a differentiated offer and accelerate online transformation
- Outline of supplier considerations in dealing with Aldi including the expectation that grocery e-commerce developments will ramp-up
- Iceland strategic priorities – delivering great everyday value, range innovation, building customer engagement and multichannel strategy
- Outline of supplier considerations in dealing with Iceland including increasing importance of e-commerce
- Summary of general advice to suppliers

Links to other relevant reports:

Kantar Presentation: Retail State of the Nation: What You Need to Think About to Thrive (2023)

IGD Presentation: How to Thrive in the Changing Retail Environment (2023)

IGD Presentation: Understanding Europe's Top Retailers and What They Require (2023)

IGD Presentation: Retailer Snapshots 1 (2022)

IGD Presentation: Retailer Snapshots 2 (2022)

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Food & Drink Wales

IGD PRESENTATION: 2022

Retailer Snapshots 1

An update from IGD on Tesco, Sainsbury's and M&S. This snapshot presentation outlines retailer strategic priorities, including key considerations for suppliers dealing with each retailer.

Key Points of Interest:

- General advice for suppliers in preparing for engaging with retailers – know all you can know before you engage
- Tesco strategic priorities – strong focus on value, raising quality expectations, health and innovation and sustainability
- Outline of supplier considerations in dealing with Tesco including being prepared for private label growth
- Sainsbury's strategic priorities – putting food first, brands that deliver and save to invest
- Outline of supplier considerations in dealing with Sainsbury's including how to benefit from the drive to triple product innovation
- M&S strategic priorities – lower operating costs, unlock online grocery growth, sharpen the food proposition and store estate fit for the future
- Outline of supplier considerations in dealing with M&S including seizing the online and data opportunities
- Summary of general advice to suppliers

Links to other relevant reports:

Kantar Presentation: Retail State of the Nation: What You Need to Think About to Thrive (2023)

IGD Presentation: How to Thrive in the Changing Retail Environment (2023)

IGD Presentation: Understanding Europe's Top Retailers and What They Require (2023)

IGD Presentation: Retailer Snapshots 2 (2022)

IGD Presentation: Retailer Snapshots 3 (2022)

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INSIGHT PROGRAMME: 2022

The Future of UK Diets

A seminal piece of research, exploring the future of UK diets. This report explores important drivers of change in diet and their predicted impact on the Welsh Food and Drink Industry. Key trends and the impact of consumer behavioural changes are also analysed.

Key Points of Interest:

- Review of evolution of food in the economy and culture and developments in food technology and the way we shop
- UK on the brink of a crisis – more than 1 in 3 children aged 10-11 years are overweight or obese and poorest in society not in a position to pay for better health or sustainability
- Methodology – approach to forecasting the future of UK diets by taking into account the impact future trends will have on product categories
- Plant-based foods and beverages are forecast to have the strongest growth with overall food consumption declining by 8%
- Overview of key drivers of change that will impact what we eat in 10 years' time including technology, commercialisation, digital and convenience
- Analysis of what this means for the Welsh food and drink industry – affordable convenience the major driving force for the long term
- Detailed exploration of trends – conscious health and wellbeing, food culture, we are what we can afford and sustainable consumption
- Assessment of the impact on food groups – charts on consumption by key food group for 2009/2019/2030 and summary of key trends

Links to other relevant reports:

thefoodpeople Presentation: Top Ten Food & Drink Trends 2023/24 (2023)

Kantar Presentation: State of the Nation Major Update: How Consumption is Changing in the Home (2023)

Insight Programme Presentation: Economic Outlook and Shopper Behaviour Impact (2023)

thefoodpeople Report: Top No & Low Alcohol Trends (2022)

Kantar Presentation: 5 Observations on Consumer Behaviour (2022)

businesswales.gov.wales/foodanddrink

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Food & Drink Wales

KANTAR PRESENTATION: 2022

5 Observations on Consumer Behaviour

Presentation from Kantar's Andrew Walker, given at TUCK IN 2022, focusing on consumer behaviours and providing key insight into how producers could use these to grow their brands in retail.

Key Points of Interest:

- An expansion of freedoms and constriction of budgets are competing forces, shaping how, where and what shoppers buy
- Pandemic changes to shoppers' habits remain despite restrictions being gone – shoppers are buying more food and drink for At Home occasions than Out of Home
- Shoppers are more discerning about reasons for spending Out of Home, greater emphasis on experience over convenience Out of Home
- With inflation at an all time high and fewer promotions in retail, shoppers will cope by trading down to cheaper products
- Opportunity for premium products and dinner deals in retail as shoppers will seek savings by trading down into store, away from Out of Home
- Retailers are focusing on loyalty strategies to retain customers – producers can seek opportunities to offer retailers exclusivity, prominence in loyalty programmes
- Lunch occasions have shifted the most from more home-based lives, with At Home Lunch occasions up 32% from 2019
- Shoppers over 65 years old contribute to 32% of grocery sales than those under 35 at 28%
- Examples of categories and brands with majority of sales from over 65s – opportunity to position brands towards older demographic who are often overlooked with marketing

Links to other relevant reports:

Kantar Report: Grocery Retail Performance (2022)

Kantar Presentation: Retail State of the Nation (2022)

Insight Programme Presentation: HFSS Impact for Food & Drink Manufacturers (2022)

Insight Programme Presentation: An Economic Overview (2022)

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Food & Drink Wales

INSIGHT PROGRAMME REPORT: 2022

Out of Home Update: May 2022

An update on the Out of Home market. This presentation includes the impact of shopper behaviour on trips, frequency and spend, as well as 2022 economic forecasts and economic recovery outlook by sector.

Key Points of Interest:

- Out of Home spend has almost recovered post-COVID but shoppers are still buying more to take home
- Although Out of Home occasions have declined as workers commute less, spend per trip is up as shoppers indulge and buy more treat products
- 'Convenience' trips have suffered more than 'experience' trips as Out of Home transactions are down 19% from 2020
- Inflation is rising faster in Foodservice than total goods inflation
- Chart outlining 2022 outlooks – recovery varies by sector in the food and drink market
- Charts tracking top trends in Out of Home food and drink – plant based, sustainability, and cuisine trends

Links to other relevant reports:

Kantar Report: Our Nation Out of Home (2022)

CGA Presentation: Drinks State of the Nation (2022)

Insight Programme Presentation: HFSS Impact for Food & Drink Manufacturers (2022)

Insight Programme Presentation: An Economic Overview (2022)

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Food & Drink Wales

CGA PRESENTATION: 2022

Drinks State of the Nation

This presentation focuses on the emerging on-trade and changes in consumer behaviour, including implications of the rising cost of living and COVID on drinks performance.

Key Points of Interest:

- Charts on market context – 2021 annual turnover £90.5bn in hospitality sector, down 32% from 2019
- Statistics showing the top occasions for on-trade visits – visits become more casual, less functional and geared towards the treat occasion
- The frequency of food-led visits has declined since pre-COVID – consumers are looking for value, quality and experience when choosing venues to visit
- 85% of UK consumers intend to maintain or increase their monthly spend on Out of Home, citing treats and pent-up demand from previous restrictions
- Statistics on the average trip spend and cost of living crisis concerns for consumers and operators
- Charts showing factors cited for supporting more local venues as consumer visits are more localised post-pandemic
- Increasing consideration of health and sustainability for the consumer – 72% of consumers take sustainability credentials into account when choosing where to eat out
- Charts showing the share of trade of different spirits in the on-trade
- 54% of consumers enjoy the experience of looking for a new drink when visiting venues
- Charts showing the performance of beers and cider, wine and sparkling, and soft drinks
- Summary of considerations and opportunities for Welsh drink businesses in the on-trade

Links to other relevant reports:

Kantar Report: Our Nation Out of Home (2022)

Insight Programme Report: Out of Home Update (2022)

CGA Presentation: Drinks State of the Nation: What You Need to Think About (2022)

CGA Report: On-Trade Drinks Performance and Trends (2021)

businesswales.gov.wales/foodanddrink

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Food & Drink Wales

KANTAR REPORT: 2022

Our Nation Out of Home

An overview of the Out of Home market performance in 2021 and ways in which value, and the consumers' perceptions of it, have shifted in a changed market.

Key Points of Interest:

- Charts showing market performance context – growth in Grocery has made up for Out of Home losses in 2021, total spend on food and drink has exceeded pre-pandemic levels
- Key takeaways for food and drink businesses based on Out of Home market performance
- Charts showing the trip occasions that have been lost with trip frequency down – occasions commonly associated with work routines have declined
- Shoppers are spending more per trip – indulgent and treat led occasions have increased in the Out of Home market
- Key takeaways for businesses on positioning their offer to meet changing needs of shoppers
- Charts showing the market value by channels – QSR was the only channel to see growth thanks to delivery
- Full service restaurants and Grocery multiples both saw the biggest shift in spend as shoppers desired more indulgent occasions and practicality
- Key takeaways for food and drink businesses based on Out of Home channels
- Only 44% of consumers in Out of Home are in a comfortable financial position, as the cost of living crisis increases financial concerns
- Charts showing the spend per consumer based on financial groups and demographics
- Younger consumers have traded down to cheaper outlets as older consumers have traded up
- Key takeaways for considering disparity between demographics when positioning product to offer value

Links to other relevant reports:

Kantar Presentation: Out of Home State of the Nation (2022)

Insight Programme Report: Out of Home Update (2022)

CGA Presentation: Drinks State of the Nation (2022)

CGA Presentation: Drinks State of the Nation: What You Need to Think About (2022)

INSIGHT PROGRAMME PRESENTATION: 2022

Economic Overview and its Relevance to Food & Drink SMEs

An overview of the current economic outlook from the Insight Programme, and its implications for food and drink SMEs. Considers COVID recovery, rising inflation, fuel costs and the crisis in Ukraine.

Key Points of Interest:

- Charts showing the good news in the current economy – UK monthly GDP now recovered to pre-COVID levels
- An overview of factors with uncertainty in the current economic situation – including drivers of inflation, gas and petrol prices, and UK overseas trade
- Charts showing the economic implications of the Ukraine crisis – 43% of Russia's exports to the world in 2021 were oil and gas
- How affected is the UK by the Ukraine crisis? Direct and indirect exposure through imports and global price increases
- Implications of the current economic situation for Welsh food and drink businesses – including production sector issues and exposure to price changes
- Changes in the consumer market – increases in costs have 1 in 5 Welsh households already feeling under financial pressure
- Key points for food and drink businesses to focus on when navigating the market and consumer focus on value, practicality and enjoyment

Note: This presentation was given as part of the Welsh Government's Insight Conference 2022. A recording of this presentation is available on the Food & Drink Wales Members Area.

Links to other relevant reports:

Kantar Report: Grocery Retail Performance (2022)

Kantar Presentation: 5 Observations on Consumer Behaviour (2022)

Kantar Report: Our Nation Out of Home (2022)

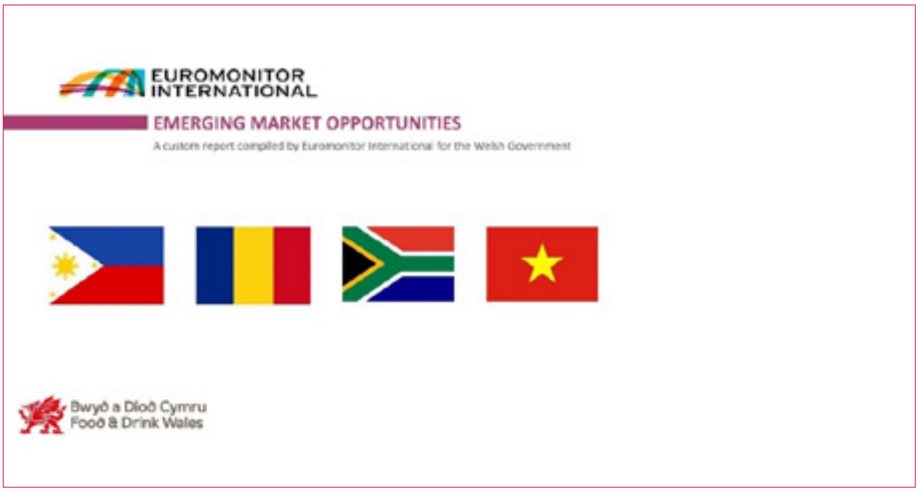
Kantar Presentation: Retail State of the Nation (2022)

Insight Programme Presentation: HFSS Impact for Food & Drink Manufacturers (2022)

EUROMONITOR PRESENTATION: 2022

Emerging Market Opportunities

Presentation from Euromonitor on export opportunities which includes an economic overview and insight into food and drink trends in four emerging markets: South Africa, Philippines, Romania, and Vietnam.



Key Points of Interest:

- An economic overview of each emerging market, including GDP, consumer expenditure, disposable income, and food and drink imports
- Where to look for opportunities to export in these markets – which categories are in growth?
- An overview of market sizes of each country and average sales per capita within food and drink categories
- Analysis focusing on top growth categories and key trends in each market:
  – Vietnam
  – South Africa
  – Philippines
  – Romania
- An overview of opportunities in foodservice and retail channels, looking at market size and growth
- A summary of retail and hospitality trends across all four markets

Note: This presentation was given as part of the Welsh Government's Insight Conference 2022. A recording of this presentation is available on the Food & Drink Wales Members Area.

Links to other relevant reports:

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

Euromonitor Presentation: Markets that will Renew Quicker and Emerging GB Categories (2021)

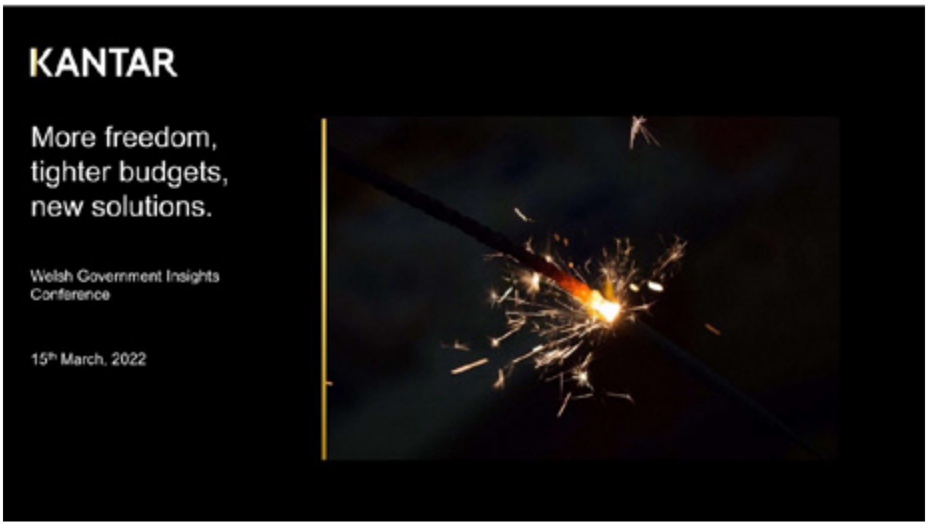
IGD Presentation: European Retail Outlook (2021)

Bwyd a Diod Cymru
Food & Drink Wales

KANTAR PRESENTATION: 2022

Retail State of the Nation: What You Need to Think About in 2022

An overview of retail market performance and implications of high inflation on shopper behaviour. Also includes key insight to help shape strategy in response to the latest shopper reaction.



Key Points of Interest:

- Out of Home spend has recovered post-COVID but volume of Out of Home consumption is still down on 2019
- Shoppers are spending less than 2020 on Take Home groceries but are still consuming more at home than 2019
- Shoppers have changed where they are shopping – E-Commerce has kept an increased share of the market despite a shift back towards pre-pandemic shopper habits
- In Wales, Tesco have the largest retailer share of market, with Lidl underperforming compared with total GB retail share
- Outline of factors that affect shopper responses in the cost of living crisis as 1 in 5 Welsh households already feel under financial pressure
- Shopper responses vary – some buy more or less, change stores, trade down in store as well as from Out of Home experiences into store
- Shoppers under financial pressure look to pay less in the moment
- Three questions for food and drink businesses to consider as competing forces of constriction of budgets against expansion of freedoms affect how, where and what shoppers buy

Note: This presentation was given as part of the Welsh Government's Insight Conference 2022. A recording of this presentation is available on the Food & Drink Wales Members Area.

Links to other relevant reports:

Kantar Report: Grocery Retail Performance (2022)

Kantar Presentation: 5 Observations on Consumer Behaviour (2022)

IGD Presentation: Online Shopping Key Drives / Quick Commerce (2022)

Insight Programme Presentation: HFSS Impact for Food & Drink Manufacturers (2022)

Insight Programme Presentation: An Economic Overview (2022)

Bwyd a Diod Cymru
Food & Drink Wales

IGD PRESENTATION: 2022

Online Shopping Key Drivers/Quick Commerce: What You Need to Know

Presentation from IGD, providing insight on online innovations and best practice online. Also includes an overview of Quick Commerce and how shoppers engage with these channels.

Key Points of Interest:

- The demographics and missions of the online grocery shopper in GB have changed since 2016 – in 2021 29% of online grocery shoppers were 65+ and fewer online shops were for the purpose of doing a 'main/big shop'
- Consumer solutions are easier to generate online and smartphone apps have become integral to store experiences
- Examples of e-commerce solutions becoming contactless and automated
- An overview of quick commerce, including examples of different types
- Charts comparing online shoppers' missions using quick commerce against total online grocery sales – events are a big opportunity for quick commerce sites
- An overview of the main barriers to quick commerce – 48% of shoppers don't need to use these services
- A summary of today's online best practice – be relevant, be visible, be helpful
- Examples of marketing and promotional activities that can boost online grocery sales for businesses

Note: This presentation was given as part of the Welsh Government's Insight Conference 2022. A recording of this presentation is available on the Food & Drink Wales Members Area.

Links to other relevant reports:

Kantar Report: Grocery Retail Performance (2022)

Kantar Presentation: 5 Observations on Consumer Behaviour (2022)

Kantar Presentation: Retail State of the Nation (2022)

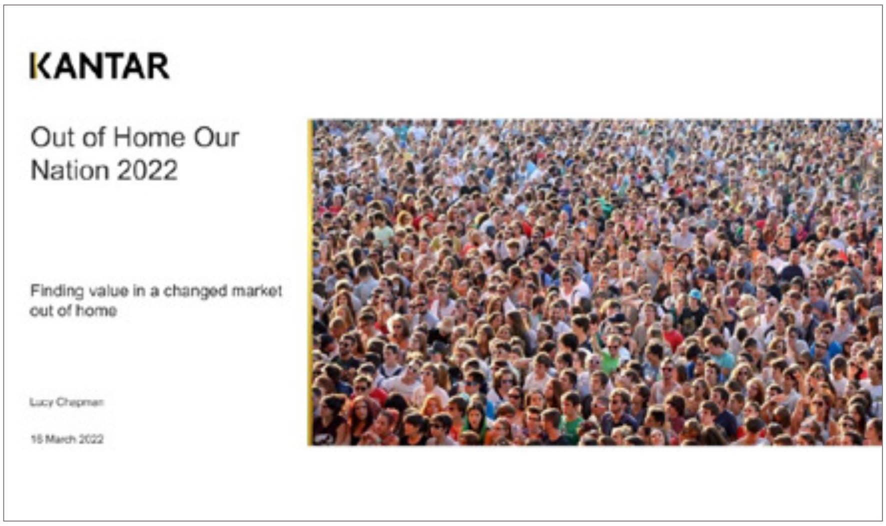
Insight Programme Report: Understanding Online Shopper Purchasing Habits of SME Food and Drink Brands (2021)

Kantar Report: The Shopper of the Future (2020)

KANTAR PRESENTATION: 2022

Out of Home State of the Nation: What You Need to Think About in 2022

Presentation from Kantar focusing on the importance of value in the Out of Home Market and changes in consumer behaviour, as well as considering how this value can be delivered for consumers.



Links to other relevant reports:

CGA Presentation: Drinks State of the Nation (2022)

Kantar Report: Our Nation Out of Home (2022)

Insight Programme Report: Out of Home Update (2022)

Key Points of Interest:

- Out of Home spend has almost returned to pre-COVID levels, but grocery spend remains higher – trip frequency is the biggest driver of decline as consumers are at home more
- 45% of consumers are trying to limit the amount they spend when they eat and drink out
- Consumers not commuting has been the main driver of trip decline – with trips down 31% during the working week from 2019
- Although trip frequency declines, spend per trip has increased as shoppers are more likely to indulge on treat led products
- Charts showing financial concern and frequency of trips against demographics – younger consumers are most concerned about future financial security
- Key takeaways for food and drink businesses in positioning products to consumers as views of value Out of Home differs.

Note: This presentation was given as part of the Welsh Government's Insight Conference 2022. A recording of this presentation is available on the Food & Drink Wales Members Area.

Bwyd a Diod Cymru
Food & Drink Wales

CGA PRESENTATION: 2022

Drinks State of the Nation: What You Need to Think About in 2022

An update on the Out of Home Drinks market in Wales and GB from CGA which also focuses on emerging opportunities in market.

Key Points of Interest:

- Charts on market context – 2021 annual turnover £90.5bn in hospitality sector, down 32% from 2019
- Financial worries have worsened in the last 6 months as prices rise, those planning to reduce visits to hospitality venues in 2022 cite personal finances and COVID safety as top concerns
- 87% of consumers have returned to the on-premise since reopening
- 85% of UK consumers intend to maintain or increase their monthly spend on Out of Home, citing treats and pent-up demand from previous restrictions
- Chart outlining important attributes to consumers when buying drinks – opportunities to position and market attributes of businesses' brands that align with consumer demand
- Charts showing the changing occasions and localisation of visits to venues – 62% of GB consumers have been supporting local venues
- Increasing consideration of health and sustainability for the consumer – 50% of GB consumers find no/low alcohol options appealing
- Charts showing the share of trade of different spirits in the on-trade
- 54% of consumers enjoy the experience of looking for a new drink when visiting venues
- Charts showing the performance of beers and cider, wine and sparkling, and soft drinks
- Summary of considerations and opportunities for Welsh drink businesses in the on-trade.

Note: This presentation was given as part of the Welsh Government's Insight Conference 2022. A recording of this presentation is available on the Food & Drink Wales Members Area.

Links to other relevant reports:

CGA Presentation: Drinks State of the Nation (2022)

Kantar Report: Our Nation Out of Home (2022)

Insight Programme Report: Out of Home Update (2022)

CGA Report: On-Trade Drinks Performance and Trends (2021)

businesswales.gov.wales/foodanddrink

Bwyd a Diod Cymru
Food & Drink Wales

INSIGHT PROGRAMME PRESENTATION: 2022

Value of Welshness: Out of Home Highlights

Highlights of the Value of Welshness Out of Home 2021 research.

Key Points of Interest:

- Affinity to Wales – a quarter of English visitors to Wales feel partly Welsh
- Guest and venue perceptions and attitudes to Welsh food & drink – includes breakdown of perceptions by 6 different attitudinal types
- Difference between guest perceptions of Welsh advertised on menus and Welsh food & drink being available on menus
- Breakdown of which guest attitudinal types visit venues with a strong Welsh food & drink offer
- 8/10 guests think offering a good selection of Welsh food & drink in venues is important, more so than businesses and venues think
- Business opportunity gap between guest desire for and venue promotion of Welsh food & drink – 93% of guests think Welsh should be promoted in venues
- Statistics on how much more guests would pay for Welsh food & drink in venues
- A quarter of guests are less likely to visit a venue if there is no Welsh food & drink.

Links to other relevant reports:

Insight Programme Report: Value of Welshness 4 (2021)

Insight Programme Presentation: Sustainability & Welshness (2021)

Insight Programme Report: Value of Welshness (2020)

Note: This presentation was given as part of the Welsh Government's Insight Conference 2022. A recording of this presentation is available on the Food & Drink Wales Members Area.

Bwyd a Diod Cymru
Food & Drink Wales

THEFOODPEOPLE PRESENTATION: 2022

Top Ten Food & Drink Trends 2022-23

A dive into the key future food and drink trends that consumers are and will be engaging with.

Key Points of Interest:

- 022-23 trends wheel showing 1 global driver, 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
- Carbon Truths – the shift in behaviour as consumers look to account for their own personal environmental impact when choosing between products
- Lab to Fork – environmental impact and ethics challenge conventional animal-based agriculture
- Sea Farms – sea plants, weeds, grains and vegetables, all healthy protein and nutrient dense
- Seamless Order & Delivery – latest technology moves seamless food and drink into a new era
- Same but Healthier – focusing on healthy eating without compromise
- Little Ones – food that challenges the junk food cycle and really meets the needs of children
- Fine Eating not Dining – a growing movement centred on the food itself and relaxed, simplicity over formal restaurant experience
- Look East – following the increased interest in Korean social culture, food and drink trends also look to Japan, Taiwan and China
- Sensory Exploration – renewed appetite and appreciation for sensory experience after the sensory deprivation of the pandemic
- Novel Nostalgia – re-discovery of the inner child, this trend is all about transportation to a memory, place or era.

Note: This presentation was given as part of the Welsh Government's Insight Conference 2022. A recording of this presentation is available on the Food & Drink Wales Members Area.

Links to other relevant reports:

Kantar Report: Grocery Retail Performance (2022)

Kantar Presentation: 5 Observations on Consumer Behaviour (2022)

CGA Presentation: Drinks State of the Nation (2022)

Kantar Report: Our Nation Out of Home (2022)

Insight Programme Presentation: HFSS Impact for Food & Drink Manufacturers (2022)

thefoodpeople: Top Ten Trends 2021-22

Bwyd a Diod Cymru
Food & Drink Wales

INSIGHT PROGRAMME PRESENTATION: 2022

HFSS Impact for Food & Drink Manufacturers

Presentation from the Insight Programme, outlining the impact of HFSS legislation on food and drink manufacturers, as well as its potential opportunities.

Key Points of Interest:

- Overview of context surrounding UK Government HFSS legislation – supporting Government aim to halve childhood obesity by 2030
- From 2015, diets started to improve from a calorie, salt and sugar perspective, driven by legislation – however, lockdown encouraged more calorie dense purchasing
- 40% of all food is HFSS based, identified based on UK Nutrient Profiling Model – 15% affected by HFSS legislation
- Overview of categories and sectors affected by legislation
- How to work out if a product is HFSS
- Outline of incoming (October 2022) restrictions on promotion in retail and exemptions
- Overview of retailer plans for in aisle promotions
- Overview of the tightening of advertising rules on HFSS products.

Note: This presentation was given as part of the Welsh Government's Insight Conference 2022. A recording of this presentation is available on the Food & Drink Wales Members Area.

Links to other relevant reports:

Kantar Report: Grocery Retail Performance (2022)

Kantar Presentation: 5 Observations on Consumer Behaviour (2022)

Insight Programme Presentation: An Economic Overview (2022)

KANTAR REPORT: 2022

Grocery Retail Performance

An overview from Kantar of the total market in GB and Wales and across key categories in 2021.

Key Points of Interest:

- Shopping behaviours returned to pre-pandemic levels – GB Grocery market saw value drop driven by shoppers buying less volume per trip
- In contrast to strong growth last year, Co-op, Morrisons and Iceland experienced the greatest decline in sales
- GB and Welsh Key market overview including penetration, volume, frequency, value
- GB and Welsh Retailer performance
- Total Grocery
- Total Fish and Seafood
- Total Beverages
- Total Bakery
- Total Cereal, Grains and Pulses
- Total Fruit and Vegetables
- Total Meat and Meat Products
- Total Oils and Fats
- Total Dairy and Dairy Products
- Animal Food

Each of the above categories is broken down into the following analysis:

– GB and Welsh category value, volume, and sector share of category

– GB and Welsh shopper profile overview

Links to other relevant reports:

Kantar Report: Grocery Retail Performance (2021)

Kantar Report: Grocery Retail Performance (2020)

Insight Programme Report: Out of Home Half Year Summary (2021)

Kantar Report: Our Nation Out of Home (2021)

The Latest Retail Performance and Trends (2021)

businesswales.gov.wales/foodanddrink

Bwyd a Diod Cymru
Food & Drink Wales

INSIGHT PROGRAMME REPORT: 2021

Value of Welshness 4 – Eating and Drinking Out of Home

Key insights into guest and venue perceptions and attitudes towards Welsh food and drink OOH, including detail about consumer attitudes towards increased Welshness in public sector sourcing of food and drink.

Key Points of Interest:

- Affinity to Wales – a quarter of English visitors to Wales feel partly Welsh
- Guest and venue perceptions and attitudes to Welsh food & drink – includes breakdown of perceptions by 6 different attitudinal types
- Difference between guest perceptions of Welsh advertised on menus and Welsh food & drink being available on menus
- Breakdown of which guest attitudinal types visit venues with a strong Welsh food & drink offer
- 8/10 guests think offering a good selection of Welsh food & drink in venues is important, more so than businesses and venues think
- What are the top categories of Welsh food & drink that guests would like more of in venues?
- Business opportunity gap between guest desire for and venue promotion of Welsh food & drink – 93% of guests think Welsh should be promoted in venues
- Statistics on how much more guests would pay for Welsh food & drink in venues
- A quarter of guests are less likely to visit a venue if there is no Welsh food & drink
- Breakdown of key barriers to businesses stocking more Welsh food & drink in venues
- Explores public sector sourcing attitudes to providing more Welsh food & drink – includes public reasons for support and top sectors public feel should be providing more Welsh

Links to other relevant reports:

Kantar Presentation: New Context, New Challenges, New Opportunities (2021)

Kantar Report: Our Nation Out of Home (2021)

Insight Programme Report: Out of Home Half Year Summary (2021)

CGA Report: On-Trade Drinks Performance and Trends (2-2021)

Insight Programme Report: Value of Welshness (2020)

INSIGHT PROGRAMME PRESENTATION: TASTE WALES 2021

Sustainability & Welshness: A Shopper's Perspective

Explores key forces of change that will shape the future consumer landscape in Wales, focusing on sustainability and Welshness.

Key Points of Interest:

- Overview of the key forces of change that will shape and frame the consumer landscape in Wales over the next 3-5 years
- Statistics on number of Eco Active and Eco Considerer shoppers, and which region has the most environmentally conscious shoppers
- Focus on buying local as part of broader sustainability issues – explores how relevant has it become since the pandemic and who buys the most local
- Explores the Desire for Welshness – 8/10 Welsh shoppers would prefer to buy Welsh products
- Explores the Power of Welshness – seeing Welshness on a pack can make Welsh and English shoppers more likely to buy
- English shoppers see Natural and Fresh as the heart of Welshness, with associated physical and emotional closeness
- Clear opportunity to promote Welshness - 93% of guests think venues should promote Welsh

Links to other relevant reports:

Insight Programme Report: Value of Welshness 4 (2021)

IGD Presentation: Sustainability & Shoppers (2021)

Kantar Presentation: New Context, New Challenges, New Opportunities (2021)

Insight Programme Report: Value of Welshness (2020)

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

Kantar Report: The Shopper of the Future (2020)

businesswales.gov.wales/foodanddrink

Bwyd a Diod Cymru
Food & Drink Wales

IGD PRESENTATION: TASTE WALES 2021

Sustainability & Shoppers: Today and the Future

Explores sustainability, its impact on retailers and suppliers, and its importance to industry.

Key Points of Interest:

- Outlines definitions of sustainability and lists its impacts on retailers and suppliers – separated into environmental, social, and economic
- IGD assumptions about 2030 – including population growth and energy usage statistics
- Explains importance of sustainability to industry – recognising regulations and aligning to customers
- Examples of retailers' and suppliers' response to these issues – e.g. Asda's refill scheme
- Details labelling and certification schemes retailers have introduced to help the shopper know what is more sustainable
- Outlines importance of new store concepts, packaging, affordability, and transparency and trust in future sustainable solutions in industry
- IGD predictions for naturally sustainable stores – including refill and recycling functions
- Caution on Greenwashing and nine key considerations for issues of sustainability – including complexity of sustainability issues and low shopper trust

Links to other relevant reports:

Insight Programme Presentation: Sustainability & Welshness (2021)

Insight Programme Report: Summary of Kantar Sustainability Webinars (2021)

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

INSIGHT PROGRAMME REPORT: 2021

Understanding Online Shopper Purchasing Habits of SME Food & Drink Brands

Explores the different online shopper habits in Wales and GB including which shopper types buy which categories, when they buy and how often. Also includes a detailed breakdown of who buys food and drink gifts online.

Key Points of Interest:

- Overview of the 6 attitudinal shopper types: Adventurers, Food Lovers, Healthy Lifestyle, Busy Lifestyle, Ethical Eaters, Traditionalists
- Rapid growth due to COVID sees e-commerce now 14% of total Grocery share
- Charts detailing how many shoppers are buying SME food and drink brands online – 4/10 buy direct from small websites
- Who is buying these smaller food and drink brands online? Breakdown by shopper type
- Shoppers are continuing to buy more online since lockdown
- What are shoppers buying for their households? Detailed breakdown of shopper types and GB versus Wales for food and drink category spend from SME brands online
- Charts displaying top categories for buying food and drink gifts online from SME brands
- Which occasions are shopper buying SME brands online for? Includes detail on shopper types
- Shoppers are buying from SME brands online for uniqueness and higher quality
- When are shoppers buying food and drink from SME brands online?
- What would encourage shoppers to buy from SME brands online? Includes pricing and promotion, making delivery easy
- Focus on subscription boxes – why shoppers are buying and how much are they spending
- Who is buying food and drink gifts, from where online, how do they much spend, and how often do they buy?
- Detailed breakdown of occasions gifts from SME brands food and drink are bought for

Links to other relevant reports:

Attitudinal Shopper and Consumer Segmentation Powered by Digital Data (2021)

Kantar Presentation: New Context, New Challenges, New Opportunities (2021)

Kantar Report: The Latest Retail Performance and Trends (2021)

Kantar Report: Grocery Retail Performance (2021)

businesswales.gov.wales/foodanddrink

Bwyd a Diod Cymru
Food & Drink Wales

INSIGHT PROGRAMME REPORT: 2021

Out of Home Half Year Summary

A summary report on Out of Home performance, pulling together recent analysis from CGA, IGD, and Kantar. Focuses particularly on Out of Home Drinks Market recovery, with detail on guest attitudes and trends.

Key Points of Interest:

- Review of 2020 UK food and drink market performance – total decline of 12% although retail grew by 9.9%, ahead of its estimated growth
- Overview of foodservice in 2020 – quick service outlets most resilient
- Charts presenting Total GB Food and Drink (excluding alcohol) Out of Home sales growth and combined YOY growth up to September 2021
- In the year up to Q1 2021, £81bn of sales lost from the hospitality sector, although most outlets have since reopened since July 2020
- Breakdown of hospitality venues closed in Wales, July 2021 versus 2019
- Alcohol sales value figures down significantly versus 2019, with liqueurs and specialities gaining share in spirits category
- Drinks Recovery Trackers detail market recovery, with recent growth since July 2021 attributed to performance of spirits
- Guest attitudes to drinking and eating in venues, including feelings of confidence and safety between venue type and age group
- Since July 2021, guests more likely to seek venues with busier atmospheres and in larger groups than in July 2020
- Explores future trends of drinking out preferences for guests, highlighting their potential impacts or opportunities for operators and suppliers – including treat spend and premiumisation, health and wellness, and sustainability and ethics

Links to other relevant reports:

CGA Report: On-Trade Drinks Performance and Trends (2-2021)

Kantar Report: Our Nation Out of Home (2021)

CGA Report: On-Trade Drinks Performance and Trends (1-2021)

thefoodpeople: 2021-2022 Top Ten Food and Drink Trends

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

Bwyd a Diod Cymru
Food & Drink Wales

CGA REPORT: 2021

On-Trade Drinks Performance and Trends

Presentation from CGA with on-trade drinks performance and trends for GB and Wales in 2021 and 2022. It covers how the on-trade market in GB and Wales has rebounded after the loosening of restrictions, charting how the emerging outlet universe is shaping up, how consumer confidence has returned and the implications for sales in the on-trade.

Key Points of Interest:

- Challenges of 2020 and early 2021 – in the year up to Q1 2021 hospitality market lost over £80bn worth of sales
- Spirits have seen a comeback since reopening in April as consumers have celebrated
- Within large Alcoholic Drinks – there has been a desire for serves that can't be replicated at home which has benefited Stout and World Lager
- In Wales, Gin still holds an important share in spirits
- Most outlets in city centres have reopened, ahead of rural outlets
- Consumer confidence analysis – in July nearly 3/4 of GB consumers have returned to the on-Premise since April
- How many on-premise visitors have received at least one dose of the Covid-19 vaccine?
- Consumers are still less confident visiting nightclubs – even more so in Wales
- Analysis on which Covid-19 measures consumers want venues to continue
- Half of Welsh consumers would like to see social distancing between tables remain
- Average spend on food has increased substantially since May and April 2021
- A full recovery? Analysis of 2021 performance vs 2019
- Trade-up opportunity – more consumers looking for a 'treat' than consciously saving
- However, polarisation of budgets, health and sustainability and ethics are all factors

Links to other relevant reports:

CGA Report: 2021 On-Trade Drinks Performance and Trends

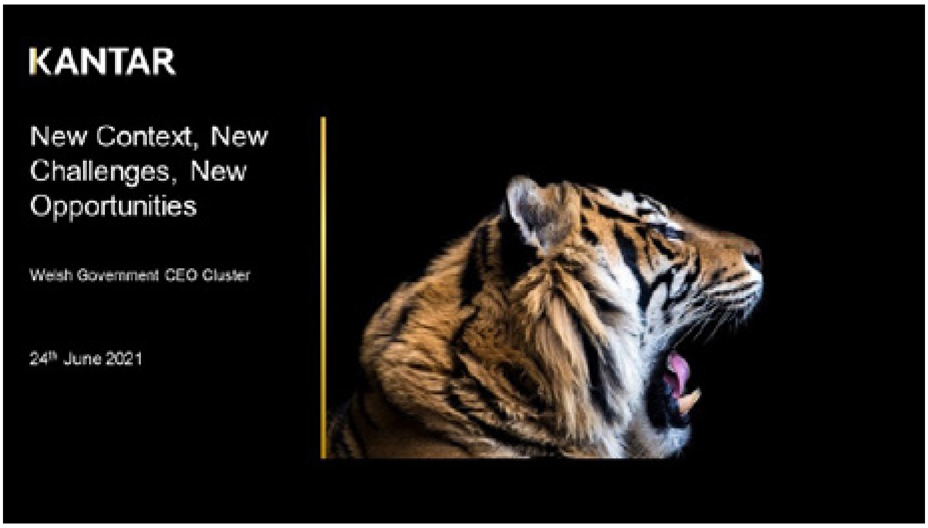
Kantar Report: The Shopper of the Future (2020)

Kantar Report: 2021 Our Nation Out of Home

Bwyd a Diod Cymru
Food & Drink Wales

New Context, New Challenges, New Opportunities

This presentation from Andrew Walker, Client Knowledge Director at Kantar Worldpanel analyses changing shopping habits in 2020-21 and where the opportunities lie for food and drink in retail. Also includes interesting discussion around brand purpose, sustainability and Welshness.



Key Points of Interest:

- 5 key changes in 2020 with statistics, including the growth of take home grocery and the impact of online
- Larger, less frequent shopping habits for food and drink appears to be a behaviour that will be longer term – this is largely due to sustained levels of online shopping
- Although some behavioural changes are shifting back towards the 'norm', there are resilient changes that will remain
- E-commerce has accelerated quicker in Wales compared with the rest of GB, and is now double the pre-pandemic levels
- Although online grew in 2020, it saw fewer wins in the smaller food and drink shops – this gap has been identified by delivery services like Gorilla and Ocado Zoom
- Meal subscription and rapid grocery deliveries make up less than 6% of total online grocery
- Discounters have a higher share of grocery in Wales than GB, and there is already momentum building for a bounce back and growth
- People in Wales show strong loyalty to local and Welsh food and drink
- Health and wellness as well as little luxuries are front of mind for consumers – what can you offer your consumers in this area?
- Following the pandemic, how many shoppers have lost or gained income and how does that impact consumer confidence?
- Is your value proposition clear – premium looks different to different shopper types

Links to other relevant reports:

Kantar Report: The Shopper of the Future (2020)

Insight Programme Report: Value of Welshness (2020)

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

businesswales.gov.wales/foodanddrink

IGD

European Retail Outlook

IGD Presentation to the Export Cluster on the European Retail Market for food and drink. Outlines the trends, challenges and opportunities for businesses exporting to European Retailers.

Key Points of Interest:

- Summary of the current Grocery Retail landscape in UK
- Summary of the current Grocery Retail landscape in Europe – e.g. in France breadth of range is key
- Graph showing the forecasted channel shares for Europe – discounters and online are predicted to grow
- Graph showing the retailer shares in Europe – Lidl is number 1 and is growing the fastest YOY
- YOY growth figures for individual European countries
- Information about the challenge of a K-shaped recovery for Grocery Retail in Europe
- Opportunities of this K-shaped recovery: growth in premium stores, awareness of organic, interest in provenance & product stories
- Further opportunities include inspiring shoppers at the fixture and through digital channels, a rise in quick grocery commerce and potential growth for foodservice spending
- Summary with key takeaways

Links to other relevant reports:

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

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

Attitudinal Shopper and Consumer Segmentation Powered by Digital Data

This cutting-edge shopper segmentation based on attitude will help businesses gain a deeper understanding of their target customers, how to refine their communication plans and optimise their trade discussions.

Key Points of Interest:

- The importance of getting under the skin of your shoppers by understanding who they are, not what they are
- Summary of the methodology and digital scale behind this cutting-edge research
- How to use this research – a more engaging way to talk to buyers, gives you direction with communications plans and can help inform packaging decisions
- Summary of the six attitudinal types of shoppers
- A diagram showing the likely overlap between attitudes
- Slide summary showing the 'Food Lovers' and the level of detail available for each attitudinal shopper type
- An example slide showing how to use and apply this valuable research
- An example slide for the other five attitudinal types of shoppers: Adventurers, Busy Lifestyles, Ethical Eater, Healthy Lifestyle and Traditionalists
- Contact the Trade Development Programme for further detail and support in using the insight: Trade Development Programme; Hannah Bailey - hannah@totalfoodmarketing.co.uk

Links to other relevant reports:

Kantar Report: The Shopper of the Future (2020)

Kantar Report: 2021 Grocery Retail Performance

Kantar Report: 2020 Sustainability Report – Who Cares Who Does Sustainability

Bwyd a Diod Cymru
Food & Drink Wales

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)

Bwyd a Diod Cymru
Food & Drink Wales

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

Links to other relevant reports:

Kantar Report: The Shopper of the Future (2020)

Kantar Report: Grocery Retail Performance (2021)

CGA Report: 2021 On-Trade Drinks Performance and Trends

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

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 (2021)

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

businesswales.gov.wales/foodanddrink

Bwyd a Diod Cymru
Food & Drink Wales

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

businesswales.gov.wales/foodanddrink

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

businesswales.gov.wales/foodanddrink

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

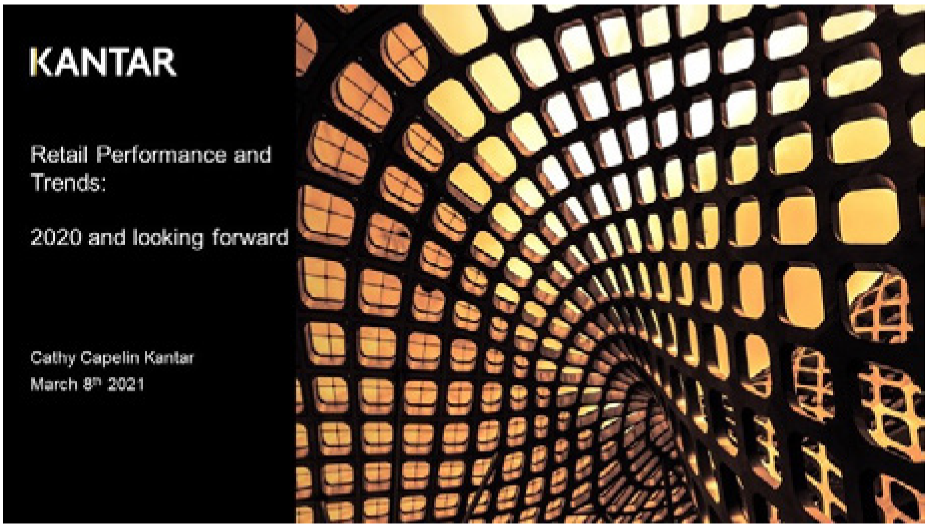
businesswales.gov.wales/foodanddrink

Bwyd a Diod Cymru
Food & Drink Wales

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

Bwyd a Diod Cymru
Food & Drink Wales

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

Bwyd a Diod Cymru
Food & Drink Wales

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

Bwyd a Diod Cymru
Food & Drink Wales

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

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

Bwyd a Diod Cymru
Food & Drink Wales

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

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:

Dylan's Presentation: 2021 Pivoting in the Pandemic

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

businesswales.gov.wales/foodanddrink

Bwyd a Diod Cymru
Food & Drink Wales

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:

– 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 Grocery Retail Performance, 2019

Kantar Report Grocery Retail Performance, 2018

businesswales.gov.wales/foodanddrink

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)

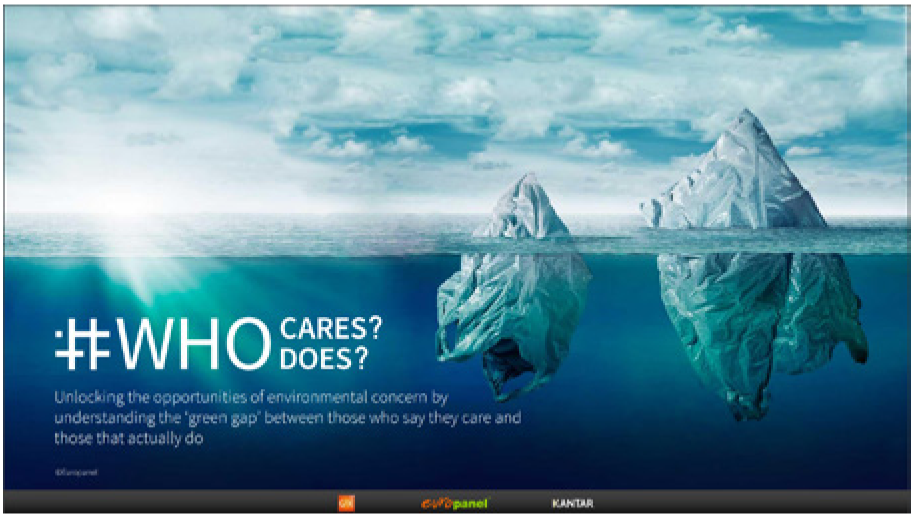
Insight Programme Report: Value of Welshness (2020)

Kantar Report: Consumer Usage (2019)

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)

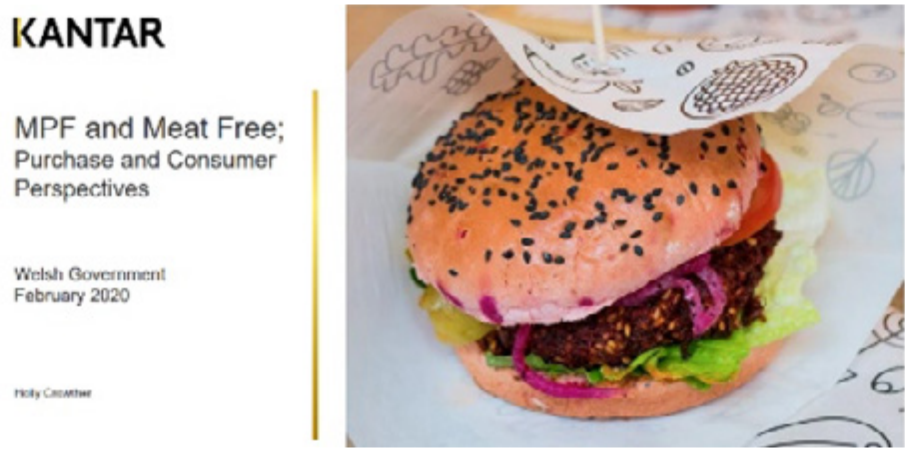
Kantar Report: 2020 Grocery Retail Performance

Bwyd a Diod Cymru
Food & Drink Wales

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.



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)

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

Bwyd a Diod Cymru
Food & Drink Wales

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.

Links to other relevant reports:

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

Key Points of Interest:

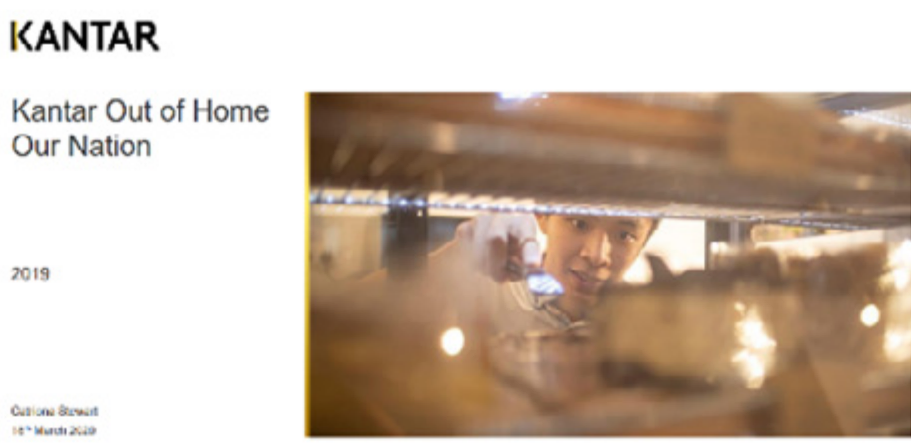
- Covid-19 slides which include:
  – Growth and frequency in March
  – Total Cheese growth in 12 weeks lock down – which could result in 3 outcome scenarios for the remainder of 2020
  – Category growth by consumer group, regionality, sector, retailer, product size
- Wales vs GB Cheese Detailed Market 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

Bwyd a Diod Cymru
Food & Drink Wales

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.



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

Bwyd a Diod Cymru
Food & Drink Wales

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)

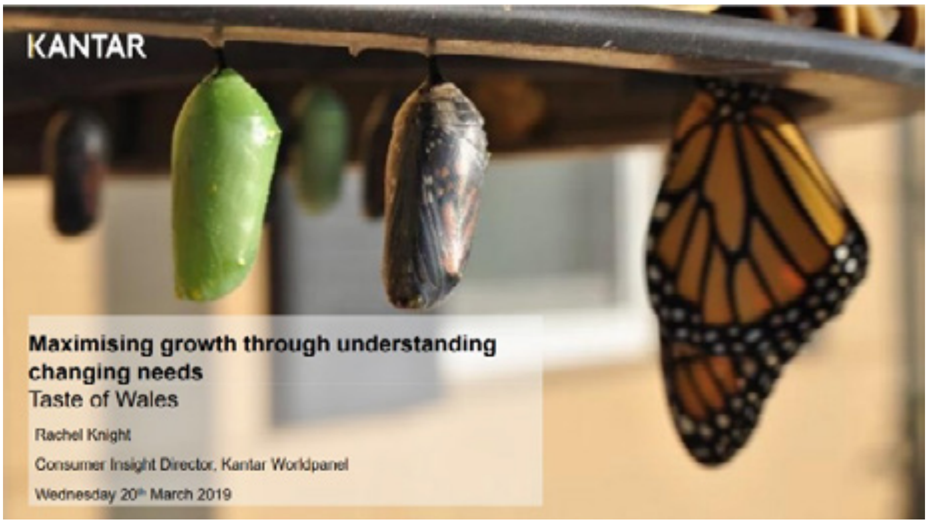
Kantar Report: Sustainability Report - Who Cares, Who Does (2020)

Bwyd a Diod Cymru
Food & Drink Wales

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

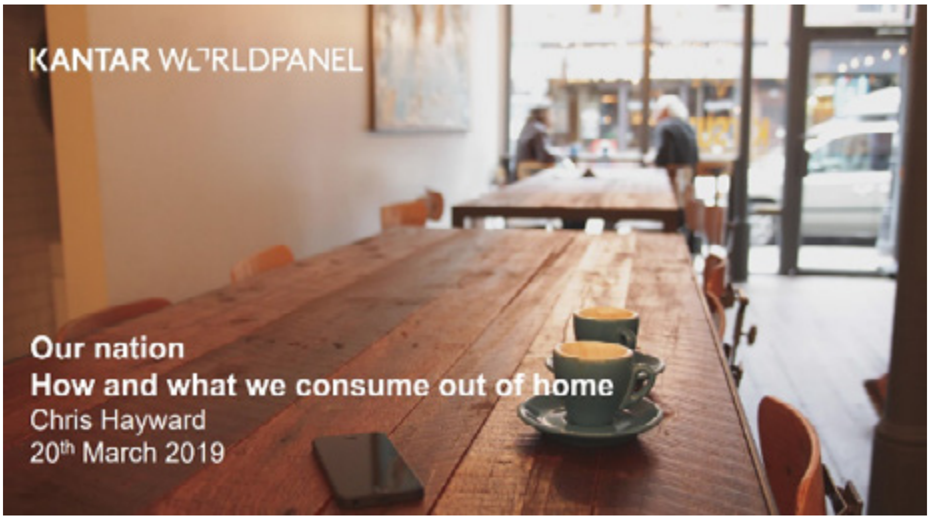
2019 Out of Home Kantar Review

Bwyd a Diod Cymru
Food & Drink Wales

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

Bwyd a Diod Cymru
Food & Drink Wales

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

Bwyd a Diod Cymru
Food & Drink Wales

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

Bwyd a Diod Cymru
Food & Drink Wales

THE INSIGHT PROGRAMME: 2019

Bite-sized report: Cocktails

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

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

Bwyd a Diod Cymru
Food & Drink Wales

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

Bwyd a Diod Cymru
Food & Drink Wales

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

Bwyd a Diod Cymru
Food & Drink Wales

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

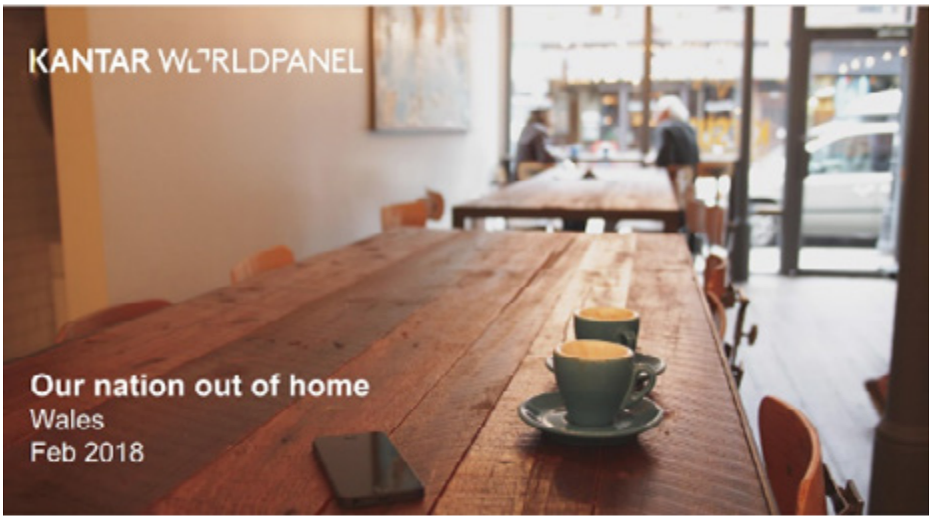
businesswales.gov.wales/foodanddrink

Bwyd a Diod Cymru
Food & Drink Wales

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

businesswales.gov.wales/foodanddrink

Bwyd a Diod Cymru
Food & Drink Wales

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

Bwyd a Diod Cymru
Food & Drink Wales

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

Bwyd a Diod Cymru
Food & Drink Wales

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

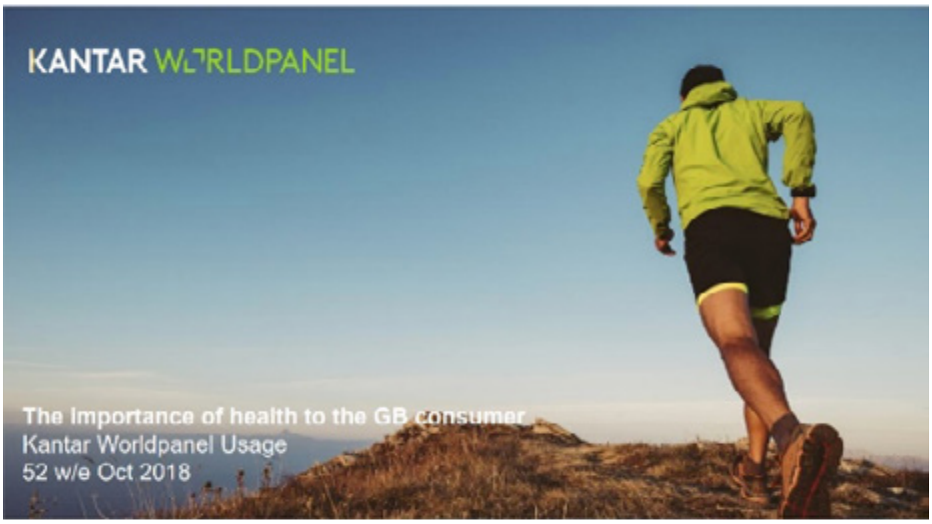
businesswales.gov.wales/foodanddrink

Bwyd a Diod Cymru
Food & Drink Wales

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

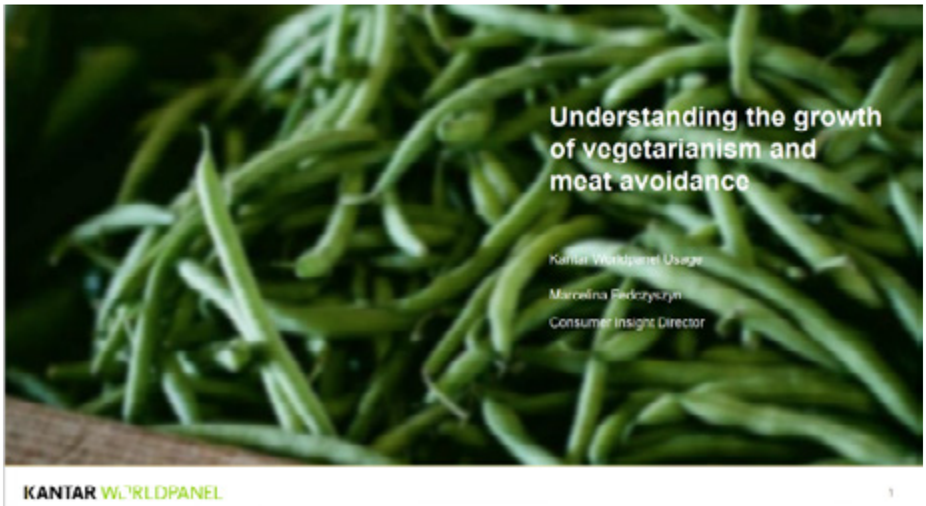
Kantar Report 2018 The Free-From Market in Great Britain and Wales

Bwyd a Diod Cymru
Food & Drink Wales

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

Bwyd a Diod Cymru
Food & Drink Wales

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)

Bwyd a Diod Cymru
Food & Drink Wales

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)

Bwyd a Diod Cymru
Food & Drink Wales

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)

Bwyd a Diod Cymru
Food & Drink Wales