



**KANTAR** WORLDPANEL

**Brexit - Standing  
on our own two feet!**

The shopper and consumer view

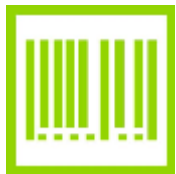
Nathan Ward  
Kantar Worldpanel



Take home  
grocery

30,000

households



Continuous scanning



Consumption

11,000

individuals



2 x 1 week online diary

Unparalleled  
continuous  
understanding of  
shoppers and  
consumers

**Brexit means...**

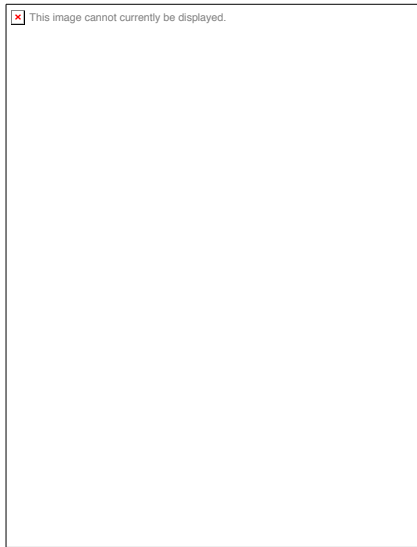




Brexit means...



...and if Brexit means Breakfast, what do that mean to us?




+5.6%\*

Average LFL inflation on Bread, Butter, Bacon Rashers, Sausages, Eggs, Baked Beans, Black Pudding, Coffee, Tea and Fruit Juice



**So what does Brexit mean  
so far?**



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...but only one thing has a direct impact on how people shop FMCG

What people feel at the Till matters!



GDP growth



Consumer confidence



Disposable income

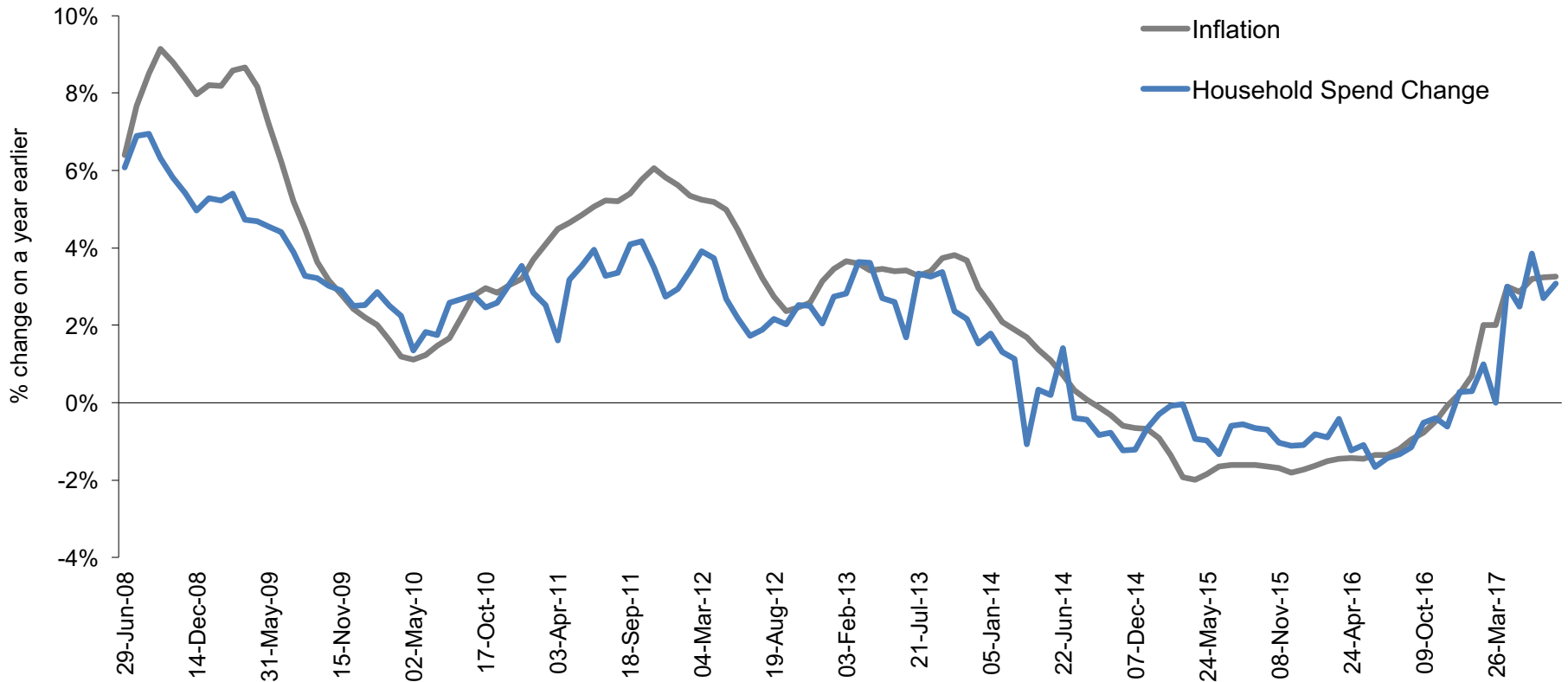


**Inflation**



# We make choices to mitigate the impact price rises

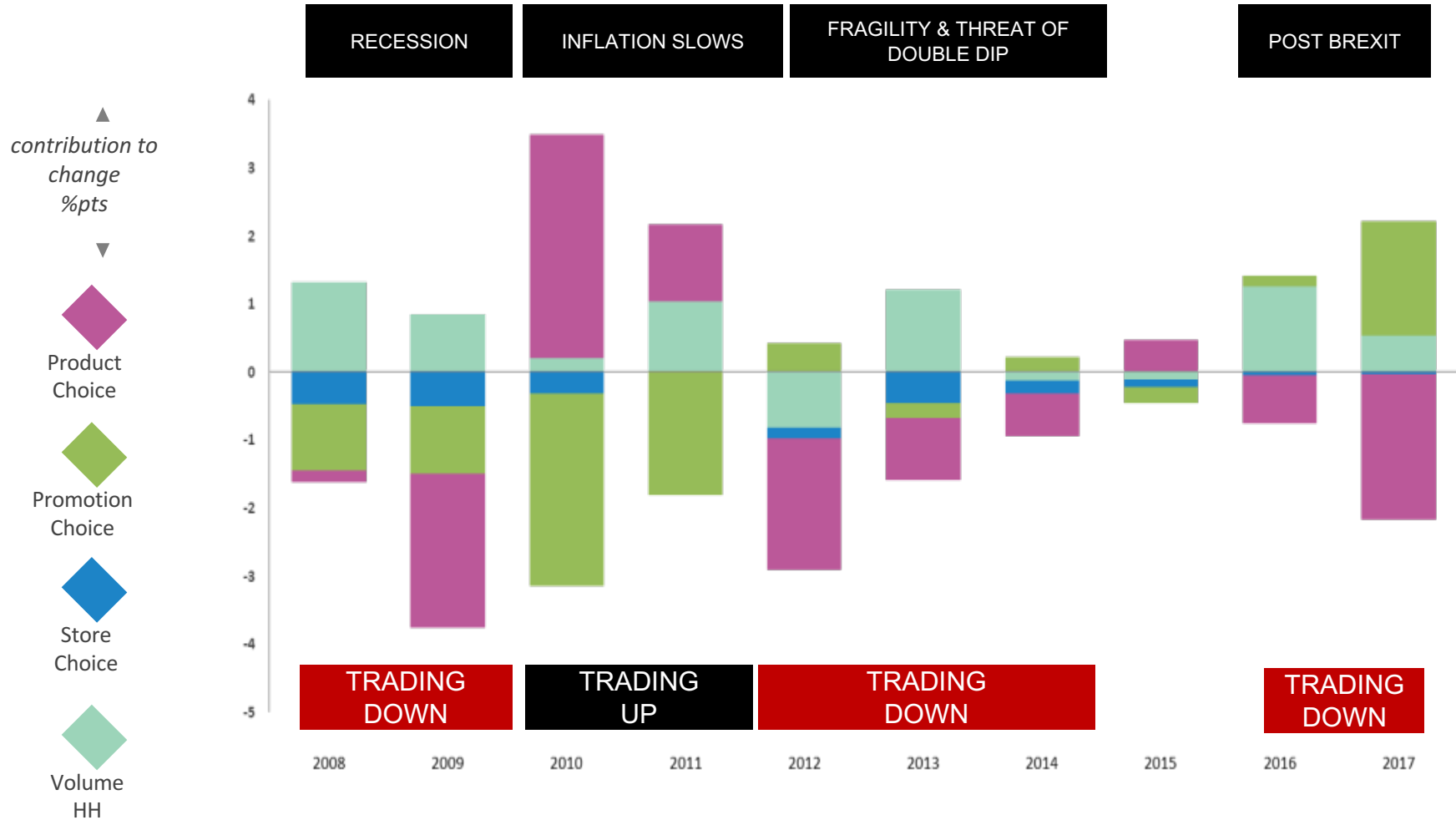
## Downtrading is prevalent in inflationary times



Total RST 12WE 13-Aug-17(KWP P04)

# ...with shoppers coping with inflation in different ways

This can help us predict how things may pan out...



# Will people return to trading up in 2018?

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## Supermarkets sweep up 17 months of consecutive growth

Supermarket sales have increased in value by 3.1% compared with last year according to the latest grocery market share figures from Kantar Worldpanel, published today for the 12 weeks to 8 October 2017. This marks the 17th period of growth in a row for Britain's grocers. Like-for-like grocery inflation remains at 3.2% but consumers could be welcoming a slowdown in price rises in the new year, with the rate projected to fall below 2% in the first quarter of 2018.

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How can we stand on our own two feet?

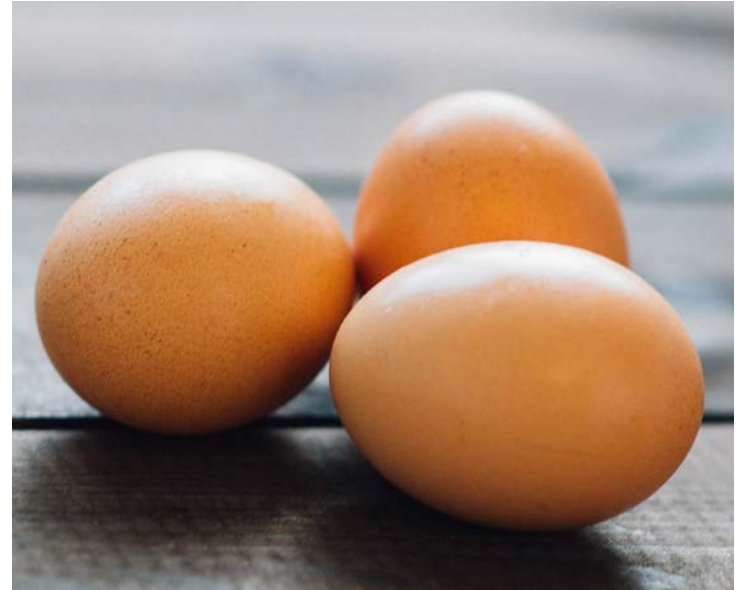


## Inflation hasn't really hit our categories in the UK...

...but we are winning from other areas where inflation has risen



**-1.2%**



**+0.8%**

LFL inflation latest 12 weeks



# Consumer choices drive shopping






Making food **easy**  
rather than just **quick**

Average evening meal takes  
33 minutes to prepare

**Effort** is key

Quicker items usually not the  
issue but convenience is...

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## Evening meals are changing

Versatile and easy to  
use in dishes

-9%



M  
&  
C

Occasions growth  
Last 3 Years

Wins in Traditional  
Roasts and occasions


48 : 52

+6%

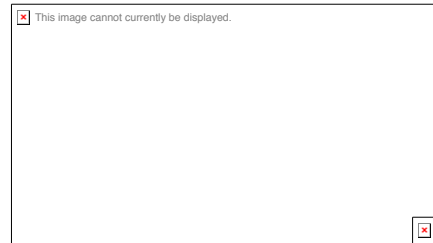
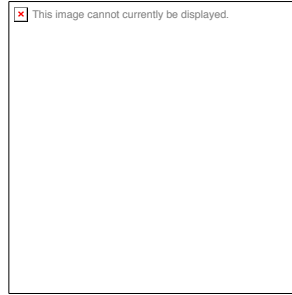
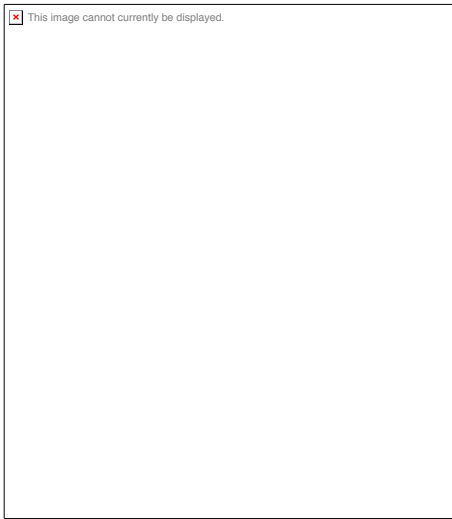
Dishes  
Occasions growth  
Last 3 Years



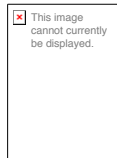
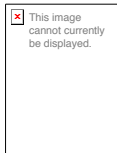
Poultry under performs for  
“Enjoyment” compared to the  
other protein categories

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# The rise of protein



Protein-named brands have grown by **+158%** over the last 2 years.

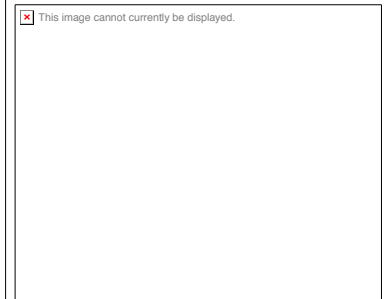
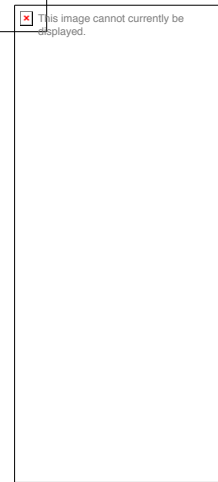


1.8m

2m

14m

Protein is essential for the body, forming one of the three macronutrients, and contributes largely to your daily calorie needs. These three macronutrients all play a vital role in helping us stay healthy, strong and lean



**...but health works well in these markets**

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**...but inspiration and  
tying to trends is vital**

**Leverage the great  
credentials we have here!**

## How can we stand on our own two feet?

- 1. Consumers are worried and feeling the pressure**  
**Well priced high quality British products can capitalise on these uncertain times**
- 2. Win whilst inflation is low in Eggs & Poultry**  
**Lock people in with great versatile products**
- 3. Quick, easy and tasty products will always win**  
**Feed Masterchef expectations from minimal skills**
- 4. Focus on the future with dishes**  
**Where can you fit in, what can you leverage?**
- 5. Health is important, but inspiration as well**  
**Leverage health, with protein a great story for our category**