



Kantar Worldpanel
Data to November 5th 2018

ORGANIC



WHO ARE WE?





330



5,000



Every time Maeve brings her shopping home she scans it in for Kantar & receive points to convert to vouchers in return. She tells us;

1. Where she shopped,
2. What she bought,
3. How much she paid



From this we can tell you...

- How many shoppers are buying (% of households) – **Penetration**
- How often they are buying (trips) - **Frequency**
- How much they buy on each trip – **Packs per trip**
- What price they paid – **Price per pack**

The Irish Grocery Market continues to grow 12we, up +2.2%.



Average HH Spend grew by +1.2% as shoppers spent more per trip (+€0.85) despite making fewer trips (-2.5%).

Dunnes take the lead in grocery with 22.4% share, Tesco make gains also in this period but Supervalu lose 0.4 share points



Grocery Market Headlines

> Market Overview

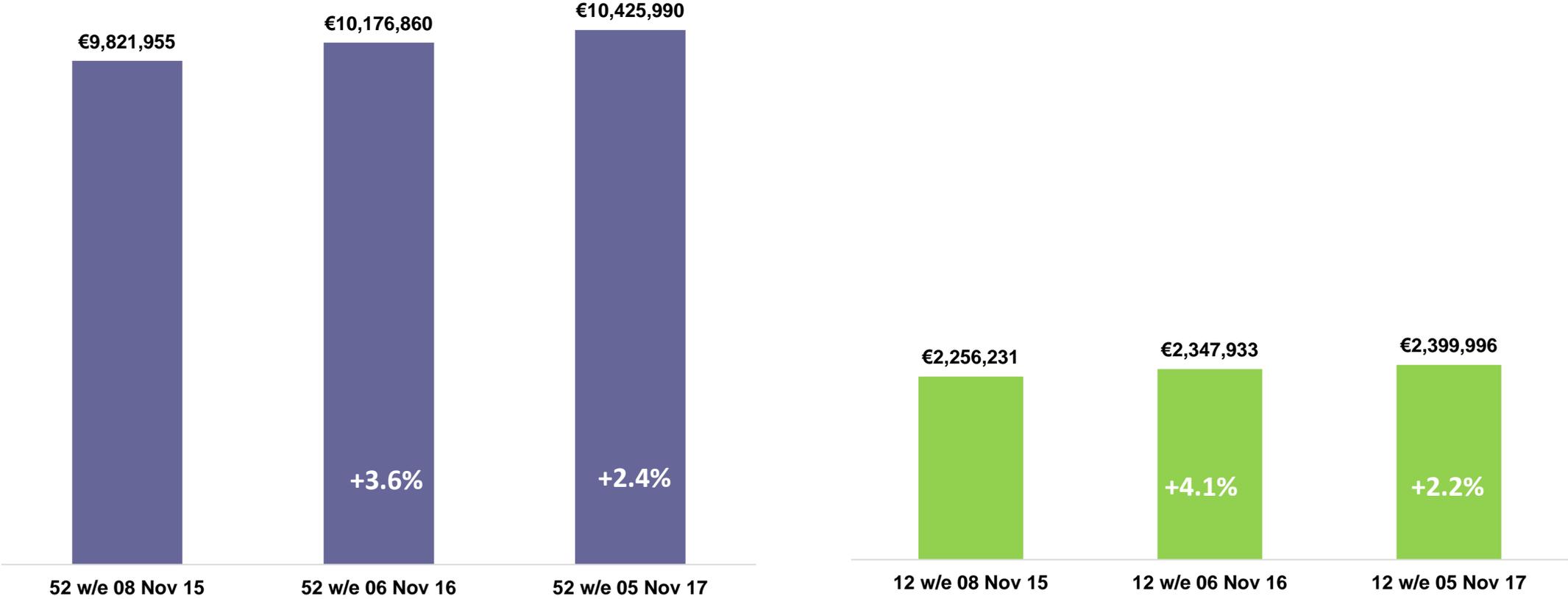
- The total market is +2% (pack volume terms) in the last 12 wks, and up +2.2% in value terms.
- Average Spend per Household is up (+1.2%) while shopper frequency fell by -2.5%. Spend per trip increased by +€0.85.

> Top 5 Retailer's Performance

- SuperValu lose the top spot, just behind Dunnes at 22% market share after slow growth of +0.5% YoY. Increased Price Per Pack is keeping them in growth
- Tesco are in third position with 21.9% share after the strongest growth in the market of 5.1%. Increased packs and spend per trip helped them achieve this.
- Dunnes take the top position with 22.4% market share despite growing behind the market at +1.4%. Penetration was their biggest weakness again this period as it dropped by -1.6 pts.
- Lidl had strong growth of +3.8% YoY, driven by increased trips and higher prices, giving them 11.6% share.
- Aldi grew ahead of the market at +2.9% YoY, giving them a market share of 11.6%. Their growth was also driven by higher prices & increased frequency.

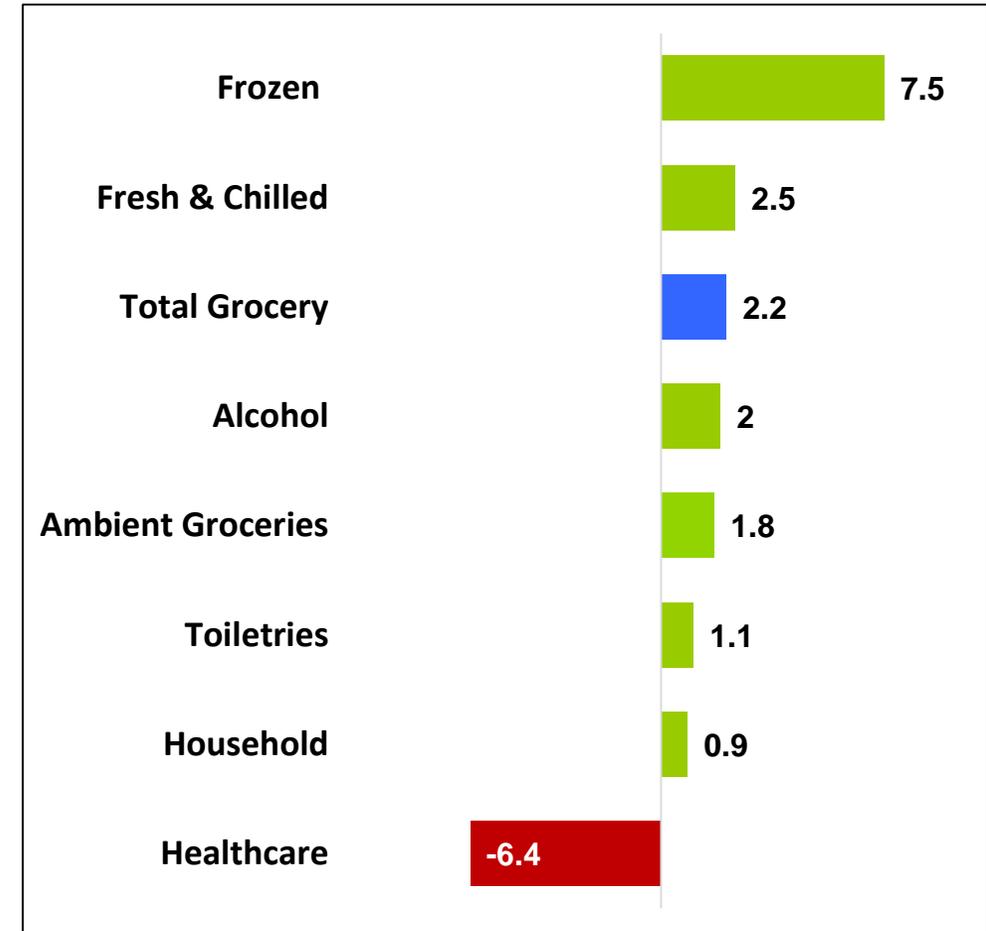
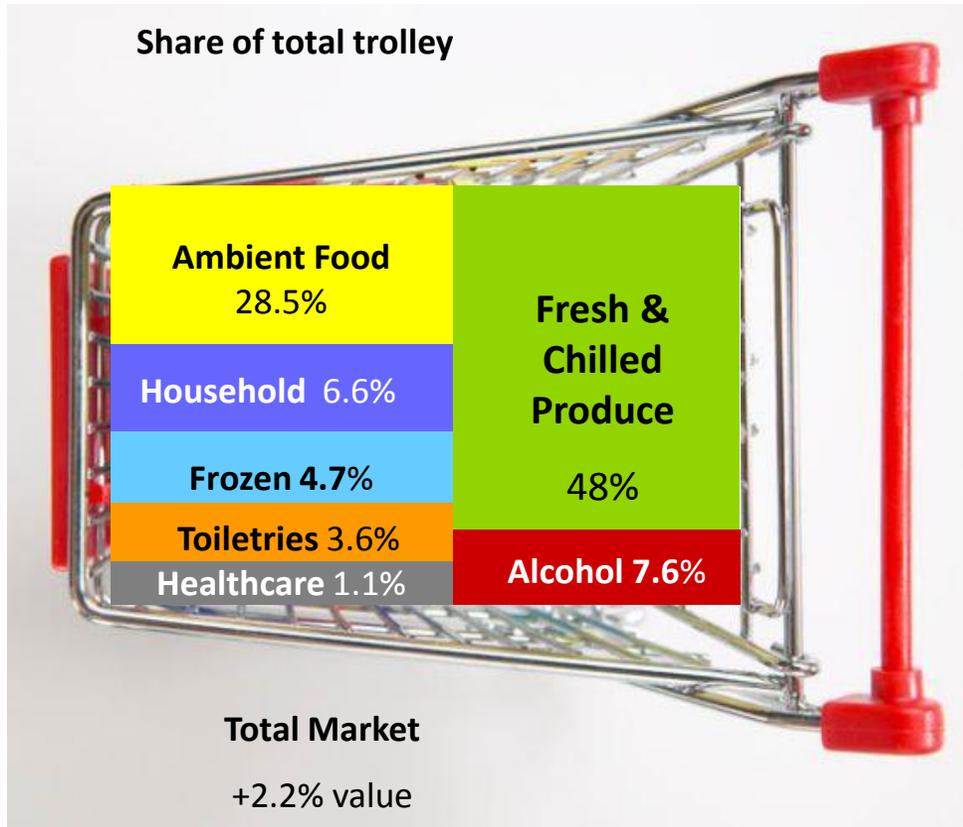
ROI grocery market sales are in growth 52we by +2.4% and 12we by +2.2%.

Total Grocery - market value & YoY %chg



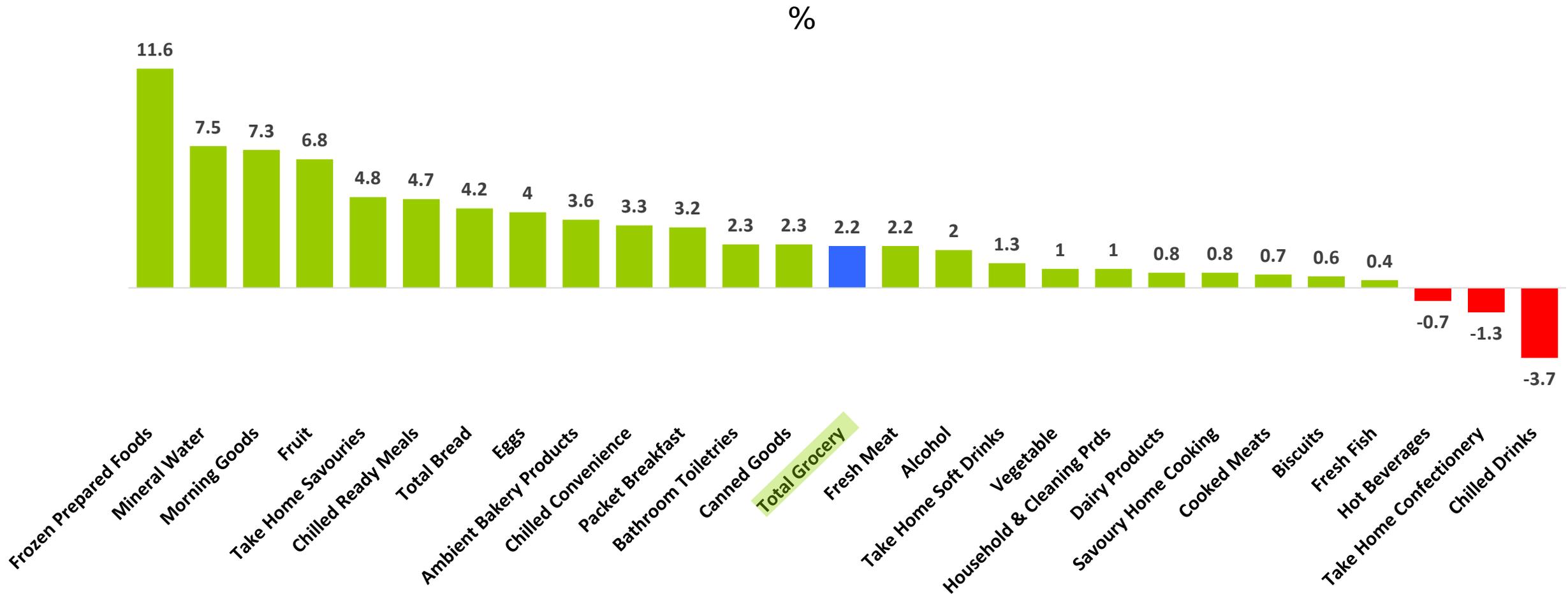
Over 12 weeks, Frozen was the fastest growing sector this period while Healthcare suffered the biggest decline.

12w Total Grocery – sector(s) value share & YoY %chg



Frozen Prepared Foods was the fastest growing sector in the last 12 weeks, while Hot Beverages, Take Home Confectionery & Chilled Drinks saw decline.

12w Total Grocery - value % chg by category



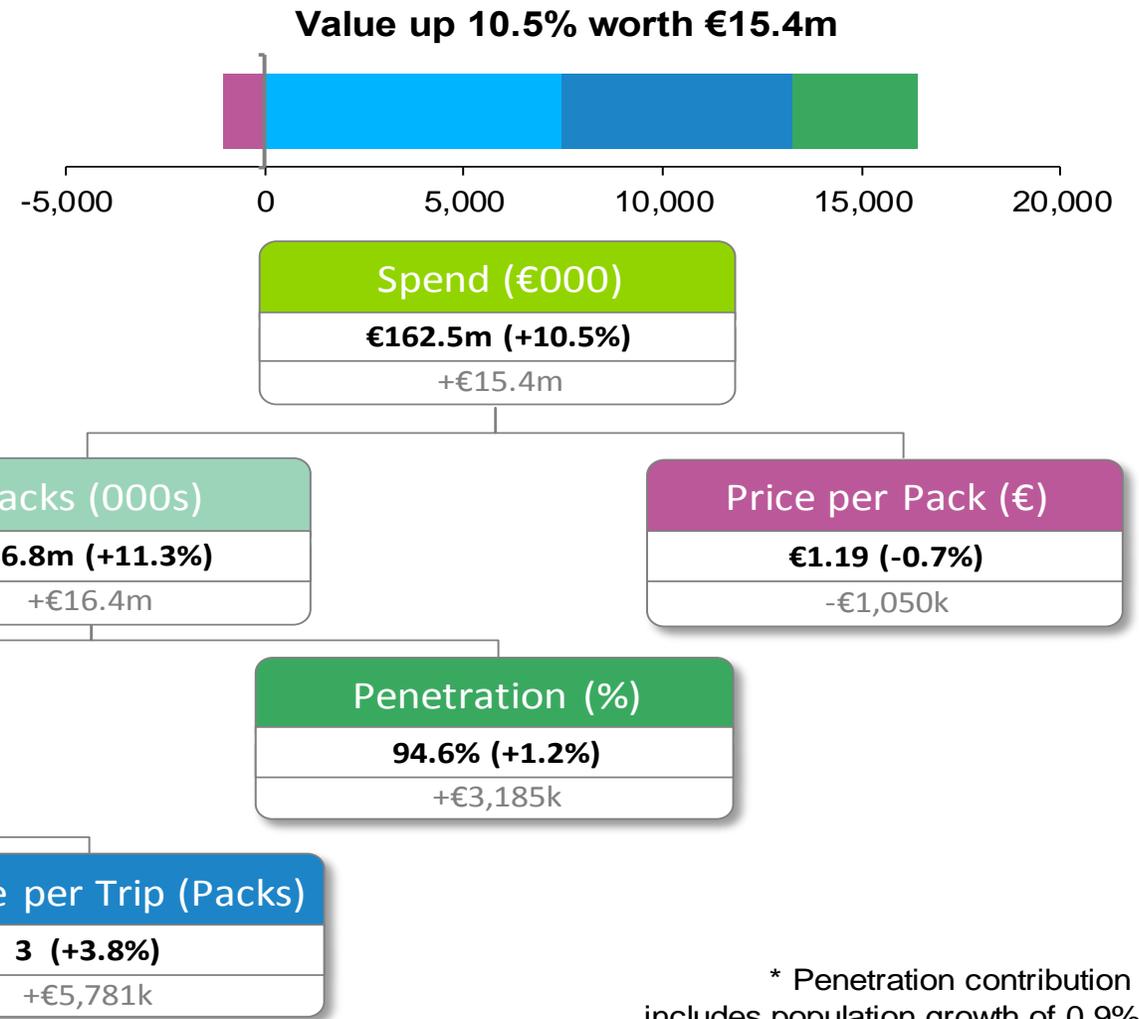


The Organic Market
Data to November 5th 2018

ORGANIC

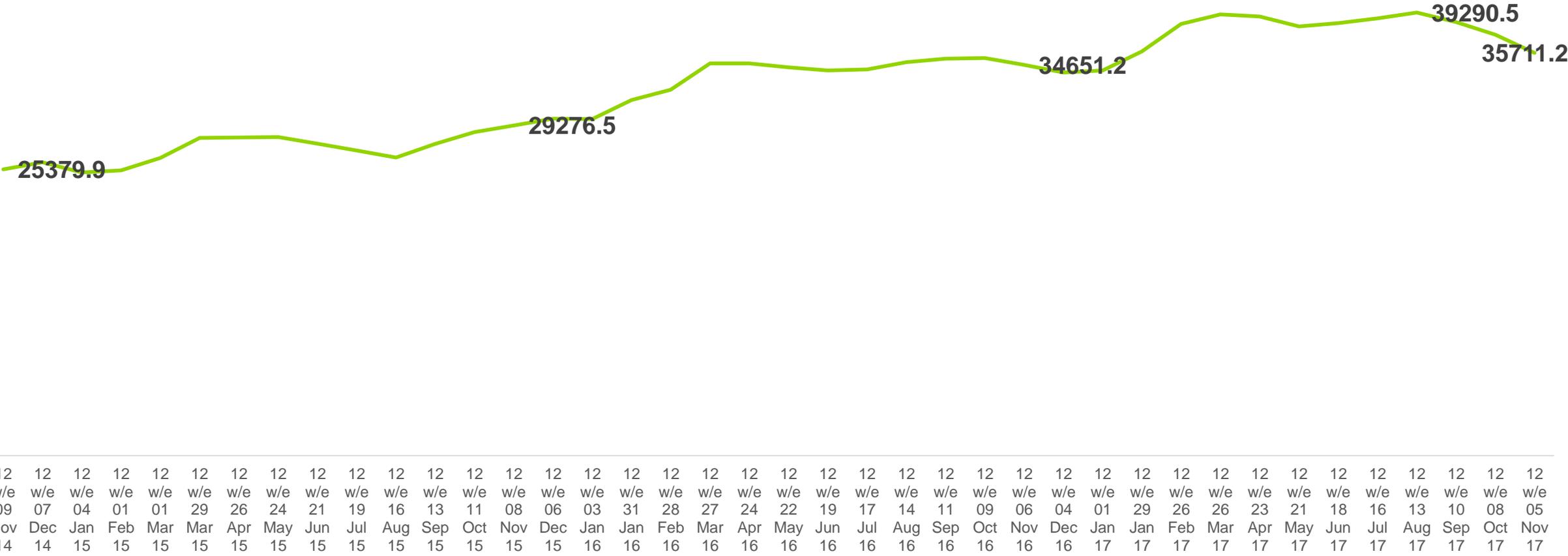
The Organic market is in growth of 10.5% this year, with consumers picking up more volume, more often. There is also an increase in penetration

Measure	52 w/e 06 Nov 16	52 w/e 05 Nov 17	Change (Actual)	Change (%)
Spend (€000)	147,133	162,527	+15,393	+10.5%
Packs (000s)	122,978	136,846	+13,868	+11.3%
Penetration (%)	93.45	94.59	+1.14	+1.2%
Frequency	26.91	28.24	+1.33	+5.0%
Spend per Buyer (€)	92.70	100.28	+7.58	+8.2%
Volume per Buyer (Packs)	77.48	84.43	+6.95	+9.0%
Spend per Trip (€)	3.45	3.55	+0.11	+3.1%
Volume per Trip (Packs)	2.88	2.99	+0.11	+3.8%
Price per Pack (€)	1.20	1.19	-0.01	-0.7%



Over the past three years Organic has seen substantial growth, however in the short term we see that the Organic Market has seen some declines since August of this year

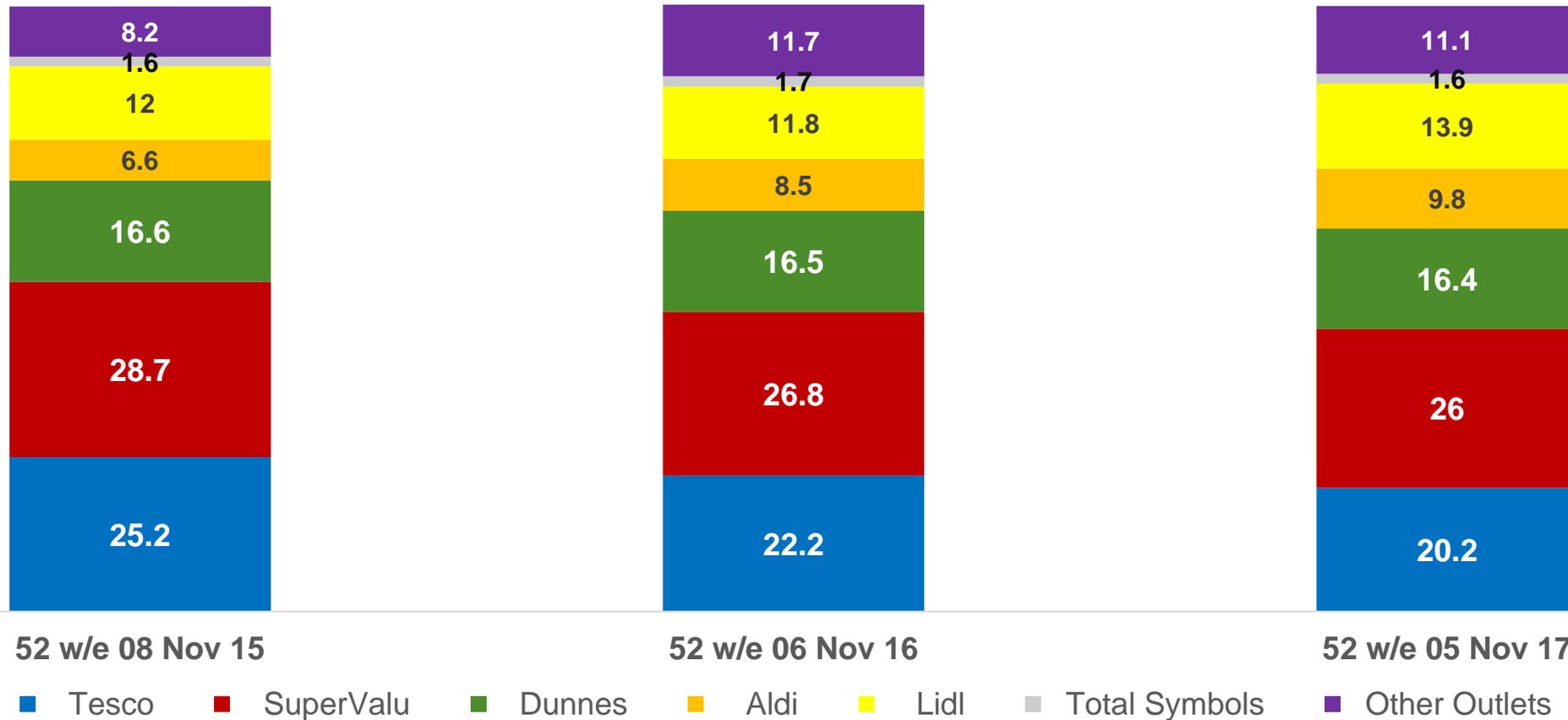
Organic



— Organic

Tesco, Dunnes and SuperValu have all lost share since 2015, while Aldi and Lidl see strong growth in this market

Retailer Share of Organic



Dunnes strong performance comes through shoppers picking up more volume in Organic, also more shopping more often



Both Aldi and Lidl see strong growth, with Aldi being driven by an increase in average price paid, whereas Lidl are being driven through Volume per trip and Frequency



Top performing categories in Organic



Vegetables
22% Total
Organic Market



Yoghurt
17% Total
Organic Market



Fruit
12% Total
Organic Market

Which categories are the retailers over trading in?

TESCO

SuperValu
Real Food, Real People

DUNNES STORES



Milk and
Yoghurt



Savoury
Carbohydrates



Biscuits



Breakfast
Cereals



Milk

Who is the Organic Shopper? *Over index

65 years
Plus

Retired
Households

Without
Children

2 member
Households

Rest of
Leinster



What do I need to know before talking to Tesco?



How are Tesco Performing in Organic?

€32.8m
+0.3%
+€112K



Frequency and Trip Volume driving growth



Tesco Overtrade in Organic Milk

How can you help? *Under Trades



Fresh Meat and Eggs



Retired and Munster

Fair Share Opportunities



€1.4M



€552K

What do I need to know before talking to SuperValu?



How are SuperValu Performing in Organic?

€42.3m
+7.3%
+€2.8m



Price is the main driver of Organic in SuperValu

SuperValu Overtrade in Savoury Carbohydrates



How can you help? *Under Trades



Milk and Eggs



Young Family and Rest of Leinster

Fair Share Opportunities



€1M



€250K

What do I need to know before talking to Dunnes?

DUNNES STORES

How are Dunnes Performing in Organic?

€26.7m
+10%
+€2.5m



Frequency and Trip Volume driving growth

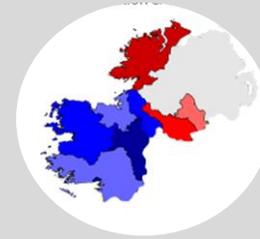


Dunnes Overperform in Organic biscuits

How can you help? *Under Trades



Fruit and Veg



Empty Nesters and Connaught and Ulster

Fair Share Opportunities



€1.3M



€1.3M

What do I need to know before talking to Aldi?

How are Aldi Performing in Organic?

€16m
+27.5%
+€3.5m



Frequency, Penetration and Average Price are driving growth

Aldi over perform in Breakfast Cereals



How can you help? *Under Trades



Savoury Carbs and Yoghurts



Older Dependent and Rest of Leinster

Fair Share Opportunities



€2.5M



€290K



What do I need to know before talking to Lidl?

How are Lidl Performing in Organic?

€22.5m
+29.6%
+€5.1m



How can you help? *Under Trades



Breakfast Cereals and Savoury Carbohydrates



Older Dependent and Rest of Leinster

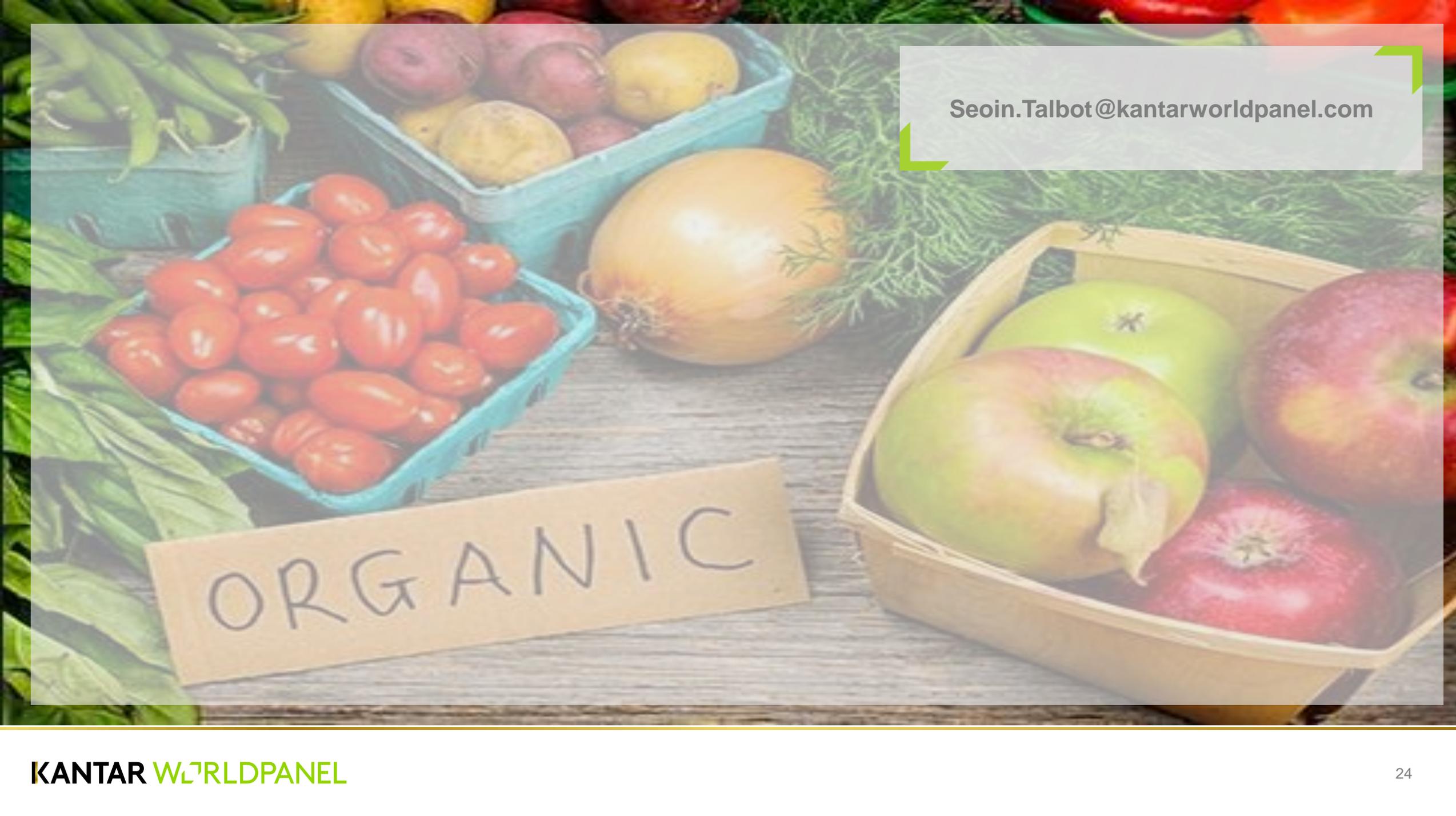
Fair Share Opportunities



€686K



€1.8M



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