

Easter

Review 2021

Part 1

April 2021



Summary

Growth vs 2020

Total store was up +3.7% this Easter vs last, which is impressive growth given the 2020 period included the stockpiling week of March

Easter Chocolate

Grew at +41% in the 4 weeks to Easter. Lindt & Sprungli and Nestle were winners. Growth could have been higher if it weren't for availability issues

Excitement to socialise

Clothing and other General Merchandise were the fastest growing categories as shoppers prepared to socialise outdoors

Hot Cross Buns

Grew at +27% in the 4 weeks to Easter. Indulgent and different flavours gain share of sales and were key to NPD



Easter this year – what are we allowed to do?

England

From 29th March

- People will be allowed to meet outside, either with one other household or within the "rule of six", including in private gardens
- The stay at home rule will end, but the government will urge people to stay local as much as possible

Wales

- The rule to "stay at home" has already been replaced by "stay local".
- Four people from two different households can meet up outdoors to socialise, including in gardens (children are excluded from the number)

Scotland

- Outdoor mixing between four people from up to two households

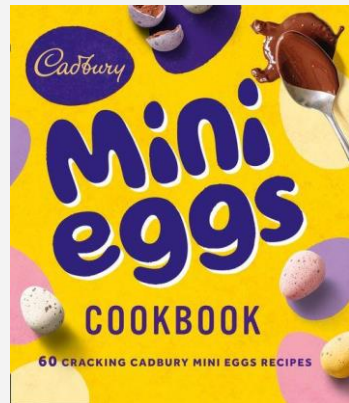
From 2 April:

- Stay at home rules become "stay local"

From 5 April:

- At least four people from two households can meet outside

What have brands done?



Cadbury launches **Worldwide Hide** and **Mini Eggs cookbook** for socially distant fun

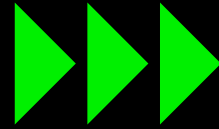
Mars Wrigley introduce **Easter Hunt Mix** packs to their range



A bumper Easter in the home despite lapping March 2020 stockpiling

31%

of GB HHs bought extra or special items for Easter 2020



£14.5b

+3.7% vs Easter 2020

+11.8% vs Easter 2019

Retailers focused on traditional Easter products and comms on price

Easter food

Make everyone a happy bunny with a mouthwatering meal



Easter mains

Serve up a showstopping ro some veg-packed vegan dis

Shop Easter mains >

Shop Easter tableware >

Food Love Stories

Tesco Finest

Easter fun for the kids

Spend some quality time with your little lambs



Easter gifts

Keep them sweet with Easter-themed m and choc
Shop Easter chocolate gifts >
Shop Easter gifts >

Easter baking

Get the little ones mixing and make some tasty bales

Shop Easter baking >



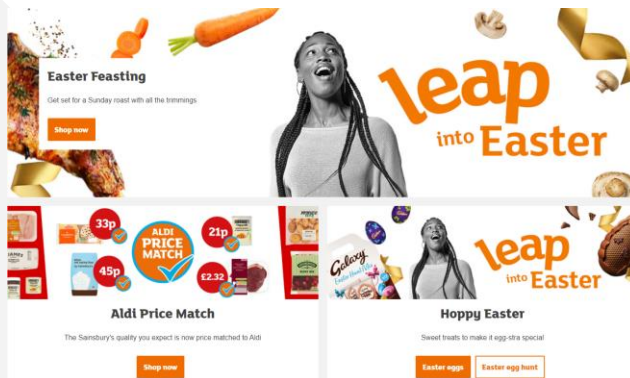
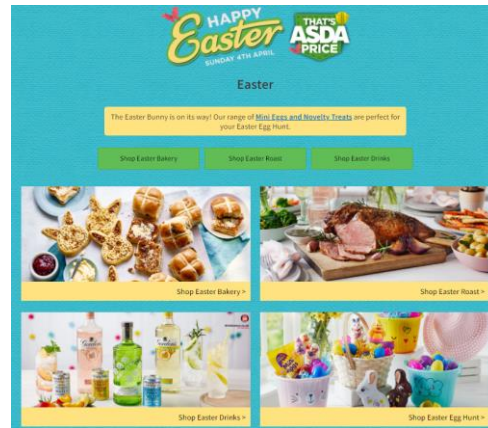
Extra-large Easter eggs



Shop Easter Eggs

Shop Easter Dinner

Shop Easter Bakery



General Merchandise categories are winners

Top 20 growing categories

Sales >£2m – Total Coverage inc Discounters –
Value % Chg – Easter 2021 vs Easter 2020



As shoppers prepared for socially distant gatherings with friends and family, this translated into strong growth for Clothing, Party Accessories and Homeware

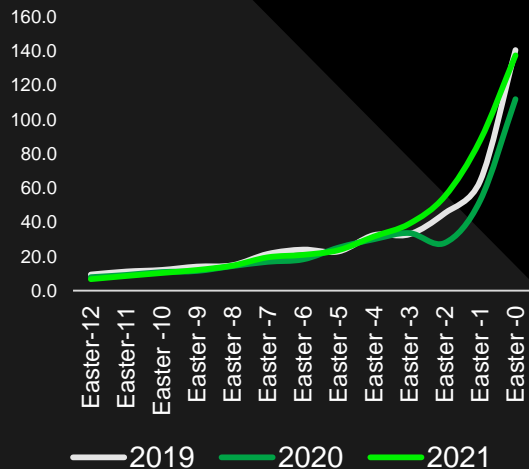


Driven by
Party Accessories

Strongest growth and early purchasing seen for Easter Chocolates

Easter Choc Confectionery

Total Coverage inc Discounters – Value Sales – Weekly build up to Easter

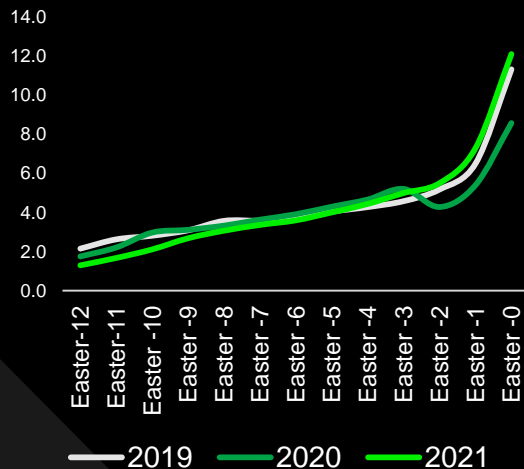


+41% vs Easter 2020

+13% vs Easter 2019

Hot Cross Buns

Total Coverage inc Discounters – Value Sales – Weekly build up to Easter

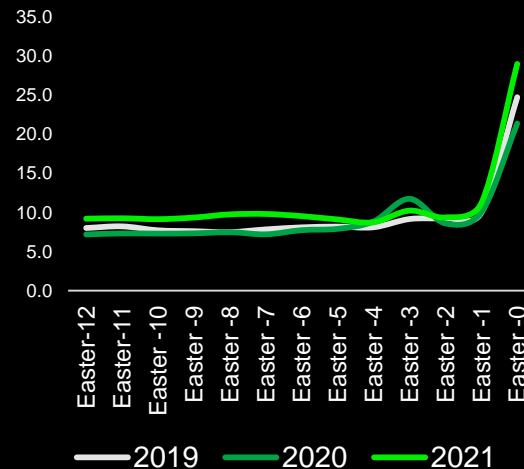


+27% vs Easter 2020

+8% vs Easter 2019

Fresh Lamb

Total Coverage inc Discounters – Value Sales – Weekly build up to Easter



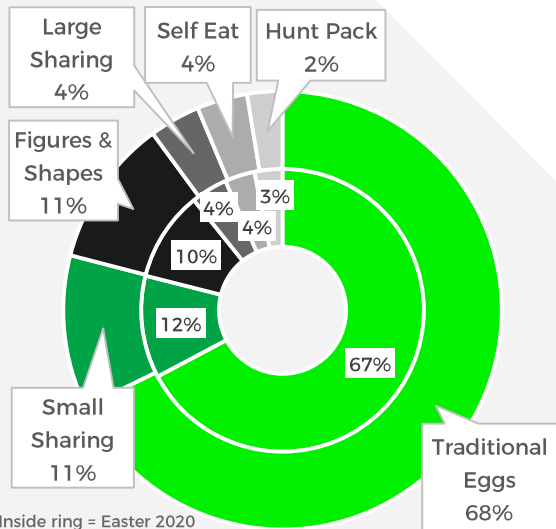
+16% vs Easter 2020

+13% vs Easter 2019

Easter Choc +42% YOY in Grocery Multis, with higher proportion of sales in final 4 weeks due to earlier Easter than 2020: 72% vs 64%

Traditional Eggs drive growth (+£55m)

Easter Choc by Format - Grocery Multiples - Value Share - Easter 2021 vs Easter 2020



Inside ring = Easter 2020
Outside ring = Easter 2021

Source: Nielsen Scantrack, Grocery Multiples, data 4w/e 3rd April 2021

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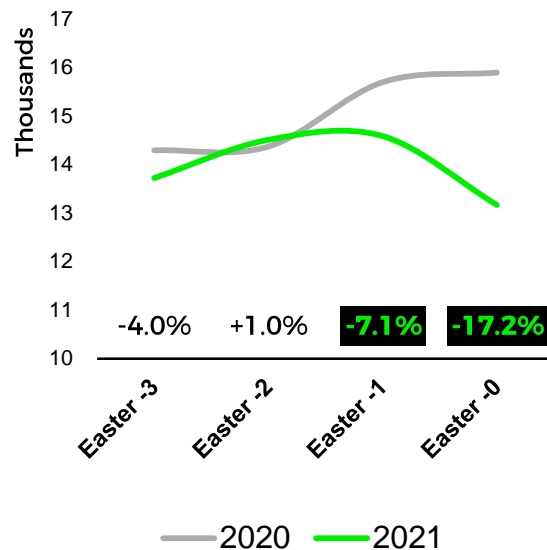
Lindt & Sprüngli and Nestle are manufacturer winners

Manufacturers - Grocery Multiples - Value Share Pts Chg - Easter 2021 vs Easter 2020



Without availability issues, growth could have been higher

Easter Choc - Grocery Multiples - AC Wtd Dist. Pts. & % Chg vs YA - Easter 2021 vs Easter 2020

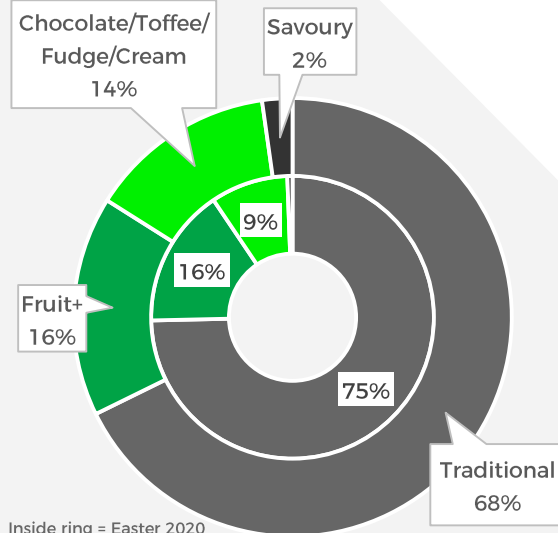


Plant HXB +32% YOY in Grocery Multis, driven by Traditional (+£2.2m)

However it is Traditional flavoured Hot Cross Buns that lose share

Indulgent/savoury flavours gain share

Plant HXB by Flavour - Grocery Multiples - Value Share - Easter 2021 vs Easter 2020



Inside ring = Easter 2020
Outside ring = Easter 2021

Source: Nielsen Scantrack, Grocery Multiples, data 4w/e 3rd April 2021, and Google Trends

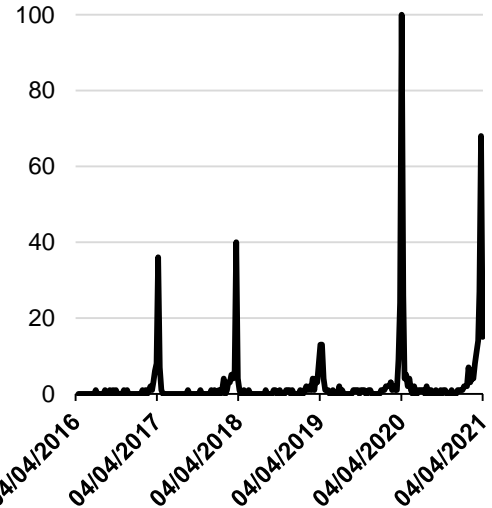
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New and interesting flavours are the focus for NPД



Google searches for HXB recipes peaks in 2020

“Hot Cross Bun Recipe” - United Kingdom - Google Searches



100 = peak search volume

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Thank you.

 **Stay tuned for more exciting insights...**

**Please contact your NielsenIQ
representative if you have any
questions**