

NielsenIQ Total Till Executive Summary

4 weeks ending 28th January 2023

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9th February 2023





Five take outs from Total Till for the 4 weeks to 28th January 2023

- 1** The **January dip** was **deeper** than usual, reflecting a **more** cautionary mindset
- 2** **Shoppers** are **actively pulling back** on **fmcg spend**
- 3** **What** shoppers **consider** as **discretionary** is **widening**
- 4** **Discounters** are leading the industry at the start of year
- 5** **Retailers** need to focus on encouraging **more shoppers**, to drive spend in Q1



Market Overview

Growth in January, is weak in the context of double digit inflation

1

Total Till sales **slowed** to **+7.6%** despite food inflation reaching a new high of **13.8%** in January (BRC NielsenIQ SPI).

Volume growth sank to the **lowest level** since **last Easter**, at **-6.9%** which suggests households are now **significantly pulling back** on **FMCG spend**.

Shoppers are preferring to shop **'little and more often'** and this behaviour is benefitting smaller format stores.

Despite weaker growth against the spread of Omicron last year, **Online** share has **stabilised** at **11.1%**.

2

The **Discounters** were by far, the channel winners in January, attracting **more shoppers, more visits** and ultimately **more spend**. The **limited assortment** coupled with **low price** promise will have appealed to cash strapped shoppers, looking to make savings at the till.

Against weaker comparatives and a conscious move by many shoppers to **buy more frozen, Iceland led the remaining retailers**.

Tesco is now **leading the big supermarkets**, followed by **ASDA** and **Sainsbury's**.

M&S still has **momentum** and is well ahead of **Waitrose** who continue to lose share.

3

Shoppers are having to **pay more** for everyday items and this is leading to double digit growth in **Bakery, Dairy** and **Pet/Petcare**.

The outbreak of **viruses** has **continued** to help stimulate sales of **cough/cold remedies** as well as top-up shops at **Chemists**.

With **inflation** in **grocery yet to peak** and further squeezes on household budgets expected in the form of **rising interest rates** and **energy bills**, this behaviour of **buying less, buying more cheaply** and **switching channel** is expected to **continue** for the **rest of the quarter**.



2023 started with a cautious mindset, with more sales in stores and at the Discounters

Tailwinds

- *Discounters **+19.6%**
- *Instore +9.4%
- Convenience +5.5%

Headwinds

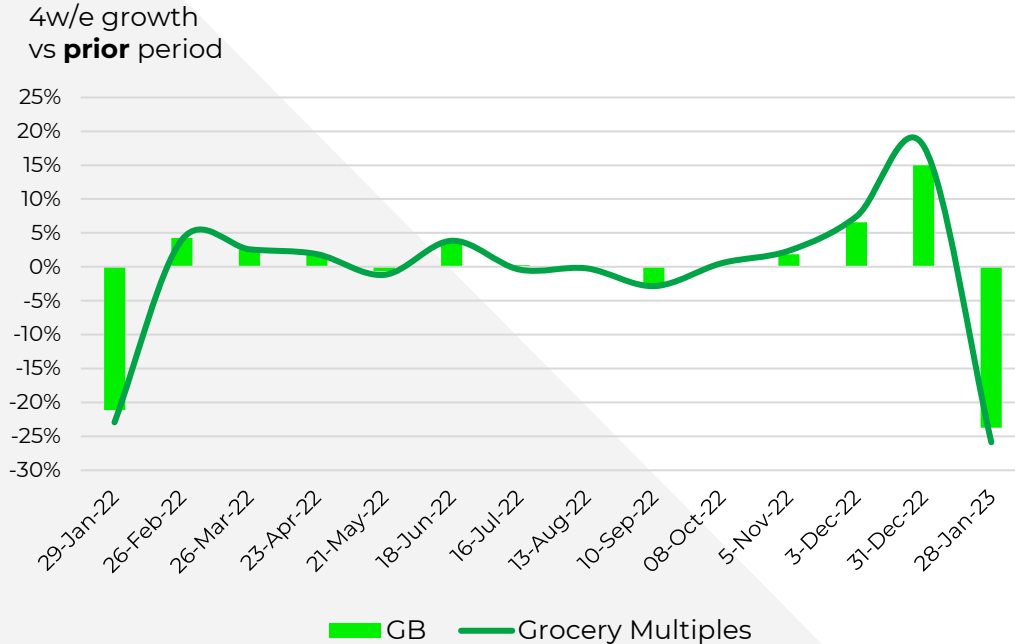
- Grocery Multiples +3.9%
- Supermarkets +3.3%
- **Value Retailers **-2.5%**
- *Online **-8.7%**



+7.6%

Total Till

The January slump is deeper than last year



Despite rising grocery prices, the decline versus last month's spending was deeper than last year.

This indicates that shoppers have had to **cut back** more **sharply** in January, to help pay down debt or help **manage wider** household expenses.

Shoppers are looking for cheaper alternatives

Wk 1: A slow start to 2023

- **Bank Holidays** and **left over food** from Christmas will have contributed to the fall in sales this week.
- Double digit **food inflation** was not enough to keep value sales positive.

Wk 2: Britain remains cautious

- Shoppers will have had time to **reflect**. Some will have started the new year with **resolutions**, including **Veganuary** and **Dry January**.
- Some shoppers will have sought **winter sun** and others not so lucky continue to fight off **viruses**.
- Shoppers spent more on **Leisure** (inc bags/luggage), **Suncare**, **Throatcare, Cough, Cold & Flu**.

Wk 3: Sales remain soft

- Sales are **typically softer** in **January** and this year is no exception, with weekly sales £2.45Bn.
- The **core grocery** categories continue to have the best growth including **Frozen, Ambient Grocery** as well as the **Impulse categories**, indicating shoppers may also be seeking out **affordable treats**.
- Shoppers sought **alternative** ways to **keep costs down** boosting sales of **firelighters**, frozen and ambient alternatives including **Frozen Poultry** and **Ambient Soup**.

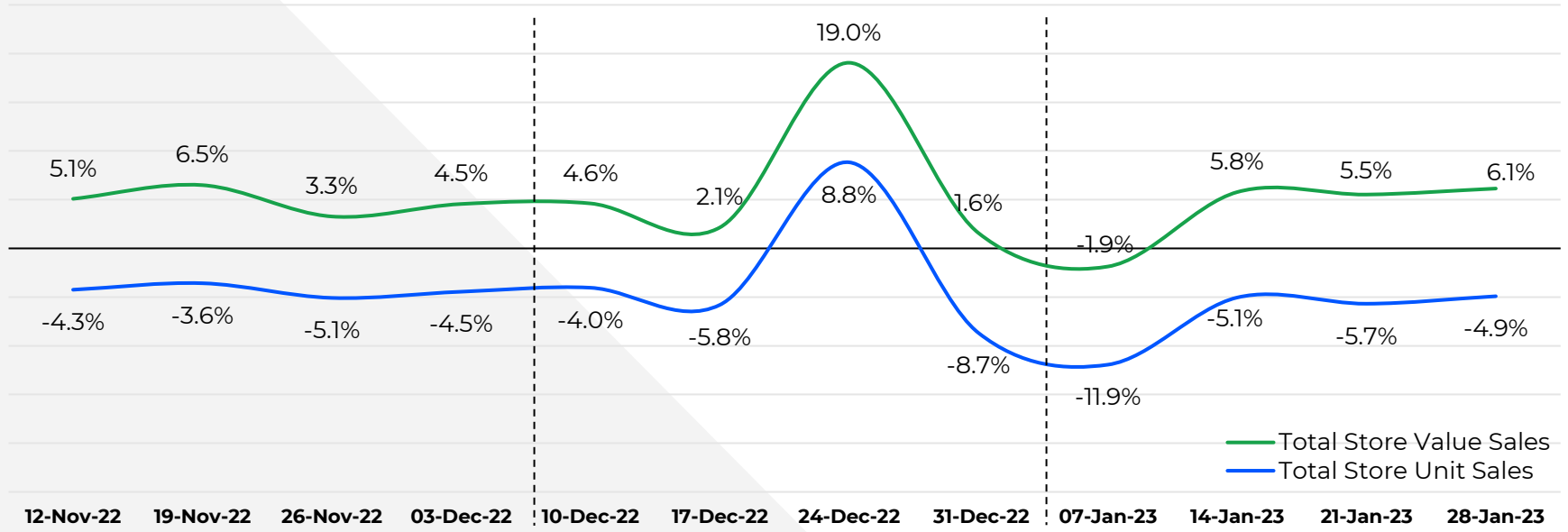
Wk 4: End of month boost

- **Sales did improve** slightly, topping **£2.5Bn**, which may have co-incided with the first monthly payday in 2023.
- Shoppers continue to seek cheaper alternatives including frozen and ambient food, to help mitigate the rising costs of everyday essentials including **Eggs, Dry Pasta, Milk, Oil**.
- **Biscuits** is the fastest growing impulse category followed by **Nuts & Seeds** which may suggest healthier alternatives are also on shopper's agendas.

Value growth has increased but units have fallen further indicating shoppers are having to spend even more on buying less

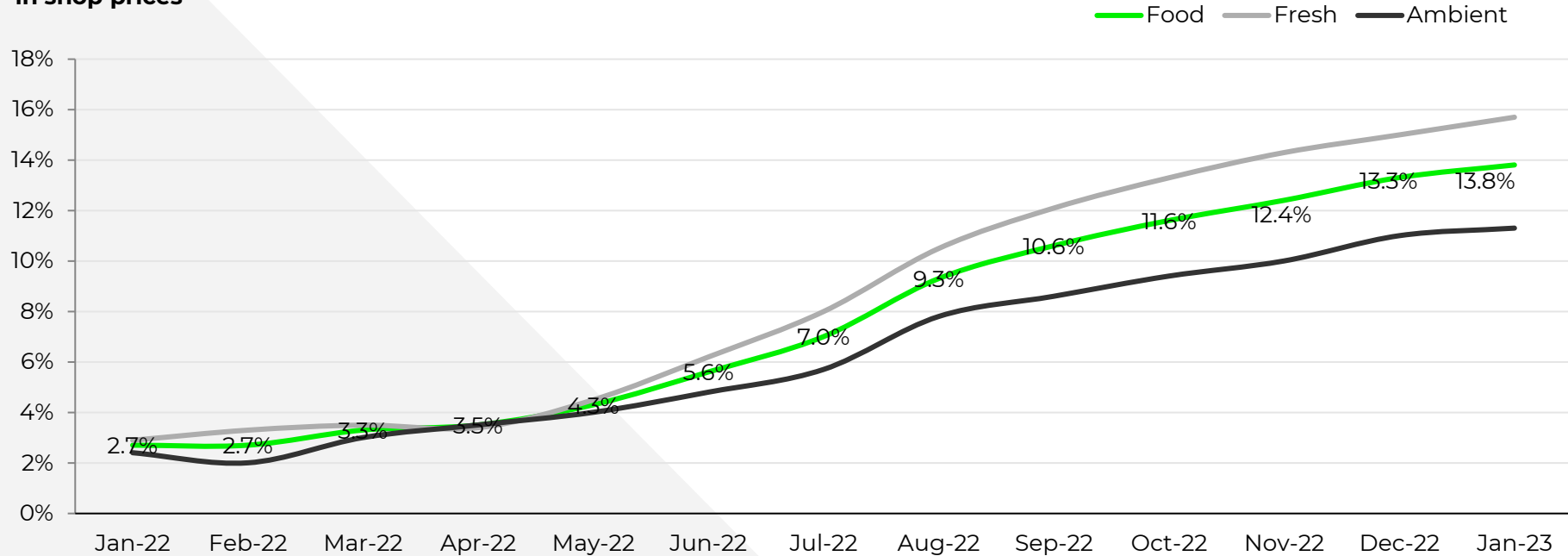
Grocery Multiples

Weekly year on year value growth



There is no respite from rising food prices, as both Fresh and Ambient Food inflation continues to break new records

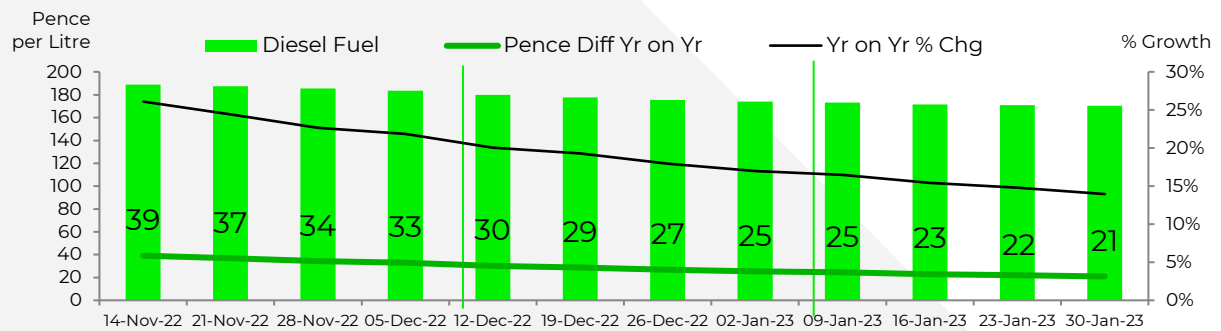
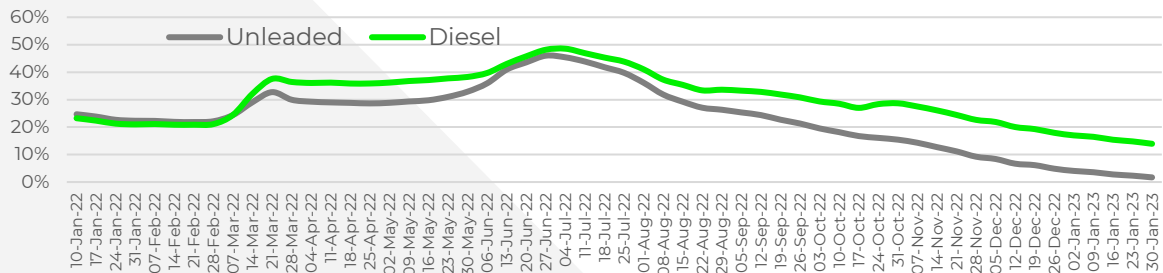
Year on year % changes
in shop prices



Source: BRC-NielsenIQ Shop Price Index

Whilst the increase in unleaded fuel has slowed rapidly, diesel prices are falling much more slowly

Yr on Yr % Growth PPL



Source: Government UK



Whilst unleaded shoppers are on average paying just **£1.34 more**, each time they fill up a 55 litre tank with fuel. **Diesel** shoppers are having to pay at least **£11.48 more** (£16.70 for an 80L tank)

Such a **significant difference** may become **another incentive** for shoppers to **switch away** from **Diesel** when they look to replace their vehicle. In the **meantime** it remains a **squeeze** on **household income**.

Shoppers made **23m MORE** shopping trips, spent **£0.38 MORE** per occasion but bought, on average, **1.0 FEWER** fmcg items

+2.1%

Spend per visit **increased** to **£18.75** from £18.40



-8.3%

Items in basket are **10.6** from 11.5 last year



+4.1%

Frequency of visit **increased** to **16.9 trips** from 16.2



Shoppers will **adjust** behaviours in 2023, to **manage household spend** in an omnichannel environment and **'little and often'** shopping is a **favourite** strategy

More visits to the Discounters

4w/e 31st December 2022

Basket Size

- **£22.02**
- +£0.68/**+3.2%** vs last year and **+12.7%** vs last month
- **11.1 items (-5.8% vs last year and +5.3% vs last month)**

Bricks & mortar shopping trips

- 498m shopping occasions
- +7.6%/+35m **more** than last year and **-0.2% fewer trips v last month**

Online Penetration

- **28%** of GB shoppers
- -2.6%/-209k **fewer** shoppers vs last year
- **+2.7%/+209k more** shoppers than **last** month

Growth of the Discounters

- **63%** of GB shoppers, **+8%/+1.3m more** v last year
- **+18%/+12m more** shopping occasions v last year and **3% more** trips vs **last month**.

January softer than usual

4w/e 28th January 2023

- **£18.75**
- +£0.38/**+2.1%** vs last year and **-15.0%** vs last month
- **10.6 items (-8.3% vs last year and -5.1% vs last month)**

- 470m shopping occasions
- +5.7%/+25m **more** than last year and **-5.7% fewer trips v last month**

- **26%** of GB shoppers
- -10%/-823k **fewer** shoppers vs last year
- **-6.2%/-494k fewer** shoppers than **last** month

- **62%** of GB shoppers, **+7%/+1.3m more** v last year
- **+9%/+6.5m more** shopping occasions v last year and **2% fewer** trips vs **last month**.



Value sales are always **softer** in January after the **December splurge** but the **month on month** drop **this year** is **steeper** and this is **despite** more **record breaking food inflation** in January.

To manage household spend, shoppers are preferring **'little & often'** shopping, so retailers will need to **adapt** to maintain and **grow** market share ...

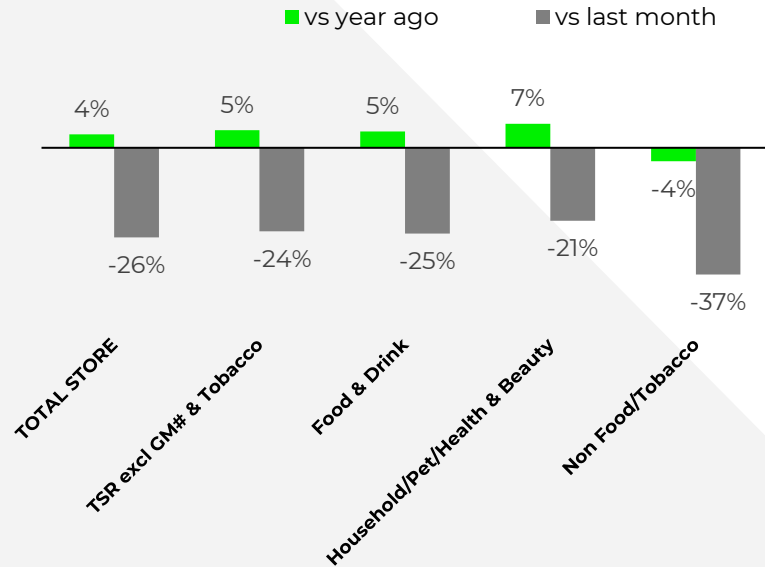


Category

Shoppers have been stricter with their household expenditure as we start 2023, making significant savings on BWS, Non Food and Impulse categories since Dec

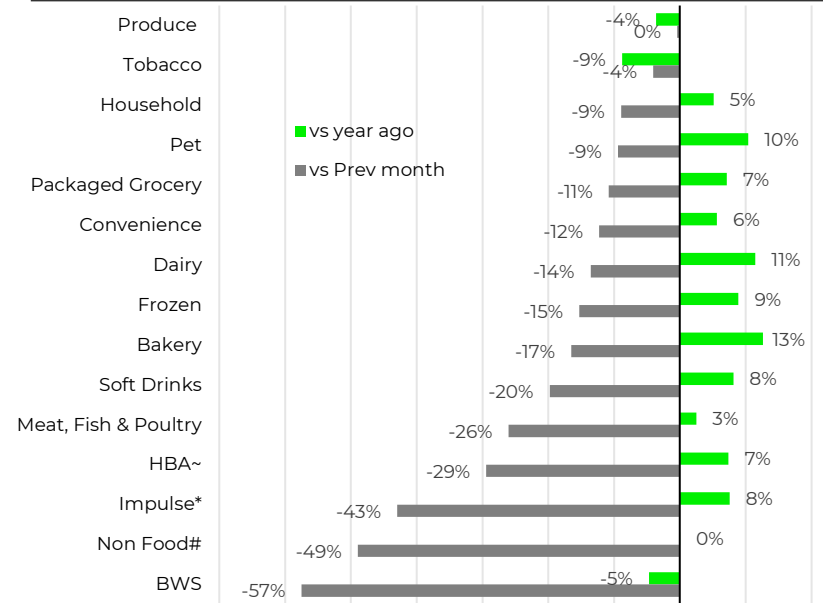
Category overview

4w/e 28th January 2023 Value Growth



Supercategory performance

4w/e 28th January 2023 Value Growth



Shoppers are making choices as they spend more on everyday items, frozen and ambient alternatives and cheaper treats are creeping up the agenda

Health & Personal Care



- Throatcare +57%
- Cough, Cold & Flu +44%
- Suncare +39%
- Personal Electrical +31%
- Deodorants & Body +21%
- Facial Tissue +19%
- Incontinence +16%
- Toilet Tissue +15%
- Anti Smoking +13%
- Vitamins & Dietary Health +10%
- Treatment Oral +9%
- Glasses & Lenses +8%

Core Grocery



- Frozen Poultry +23%
- Milk +21%
- Dry Pasta +21%
- Oil +20%
- Eggs +19%
- Garment Care +17%
- Table Sauces/Condiments +13%
- Frozen Meat +13%
- Dog +13%
- Cat +12%
- Gravy/Stock +12%
- Cheese +12%
- Bread +11%

Convenience



- Frozen Bakery Products +36%
- Fresh Noodles +30%
- Fresh Dough/Pastry +28%
- Ambient Soup +25%
- Sports & Energy Drinks +23%
- Dry Noodles +23%
- Frozen Potato +23%
- Rolls & Baguettes +16%
- Frozen Savoury Products +16%
- Sandwiches +16%
- Frozen Ready Meals +16%
- Morning Gds & Spec Brds +14%

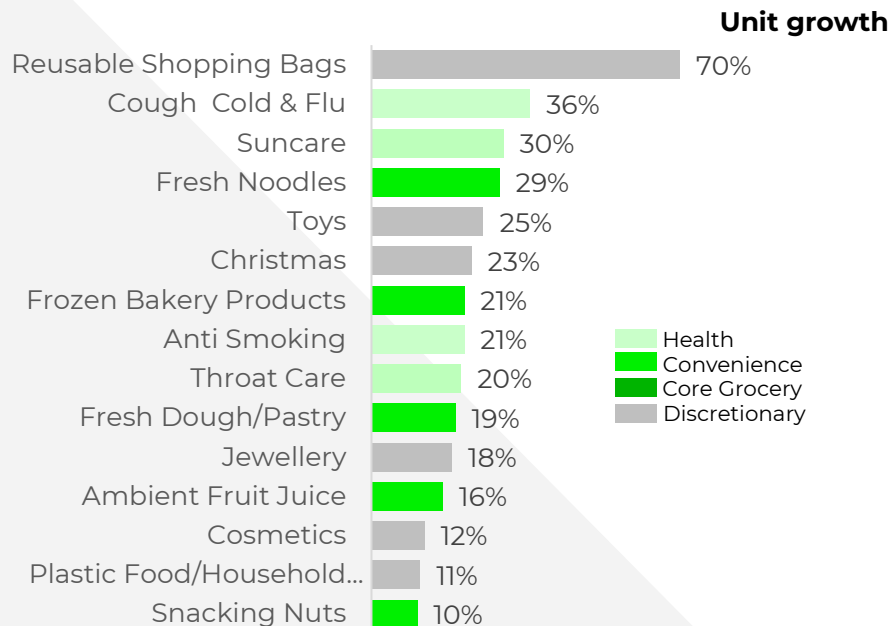
Discretionary/Treats



- Reusable Shopping Bags +55%
- Leisure (inc Travel)+39%
- Fire Lighters +39%
- Cosmetics +17%
- Beauty Skincare +16%
- Plasticware +16%
- Jewellery +13%
- Small HH Electrical +13%
- Sweet Biscuits +12%
- Cake Chilled +11%
- Plastic Food/HH Storage +11%
- Cake Ambient +10%

Shoppers reigned in spend in January, focussing more on essentials, health, cheaper convenience foods and treats that matter ..

The biggest unit uplifts were for some discretionary items, healthcare and convenience foods




Shoppers are continuing to spend **wisely** and on items perceived to add **value**.

End of season sales will have provided an **incentive** to purchase some general merchandise items in January.



As shoppers **focus more** on **till spend** and **typically buying** just **10 items** per basket, products will have to **work harder** to **meet shopper expectations**.

Shoppers will also **focus** on **health** and **sustainability** in 2023 and these are **attributes** that are likely to **stimulate growth** going forward.



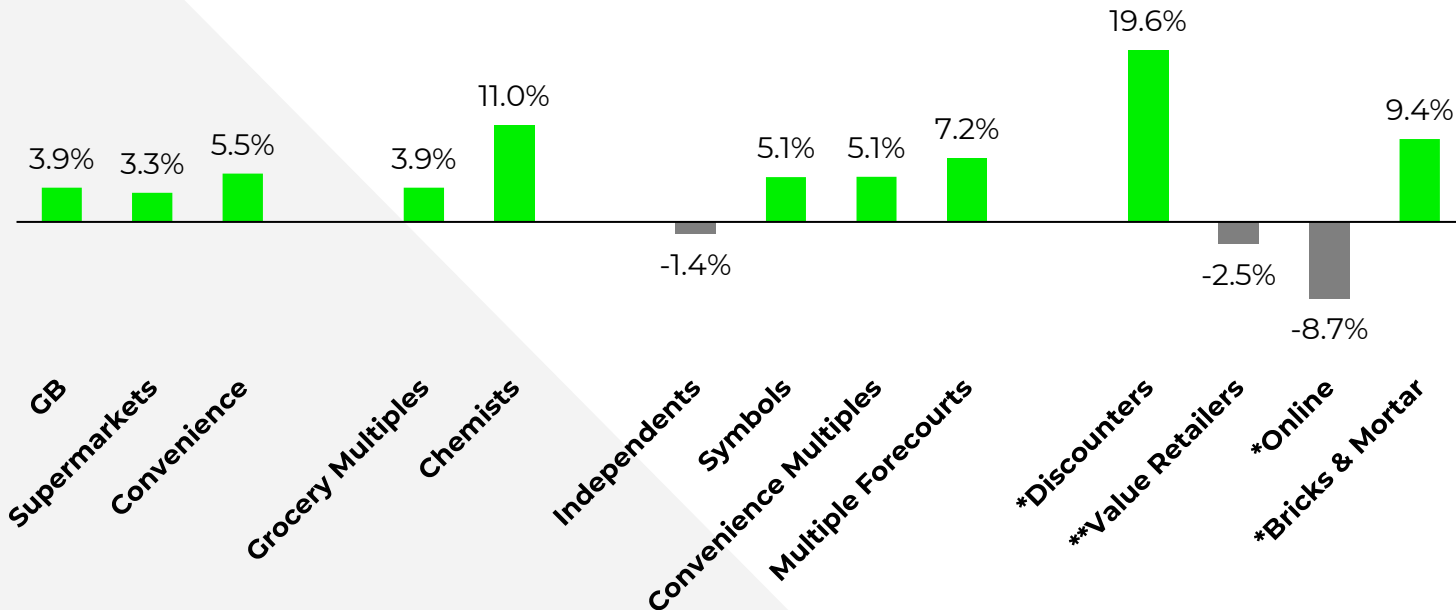
What happened by channel?



Shoppers favoured stores and smaller store formats including the discounters, whilst ongoing viruses stimulated sales at Chemists

Total Store Channel growth

4w/e 29th January 2023 vs last year



Source: NielsenIQ Scantrack Total Store Read , *Homescan FMCG, **Homescan Total FMCG

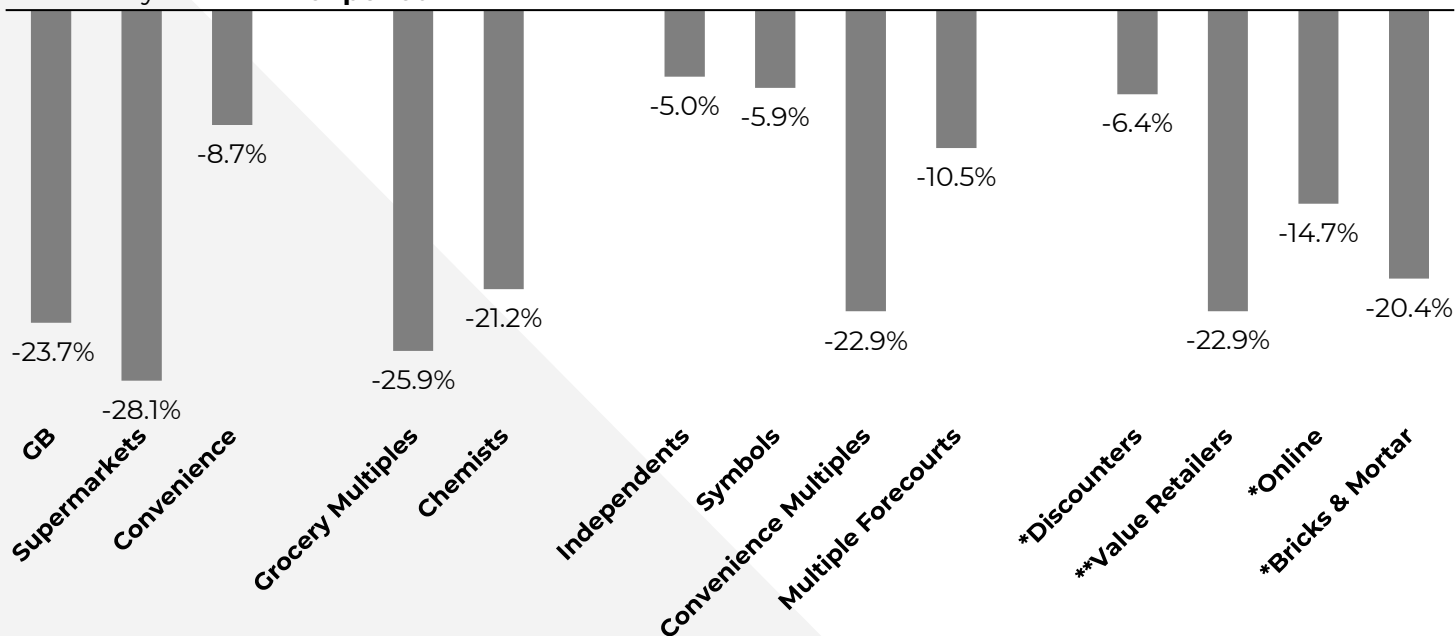
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Nb. Supermarkets include Dark Stores and Pick stores 20

After a strong Christmas, all channels saw sales weaken in January, the depth however, was much shallower at the Discounters

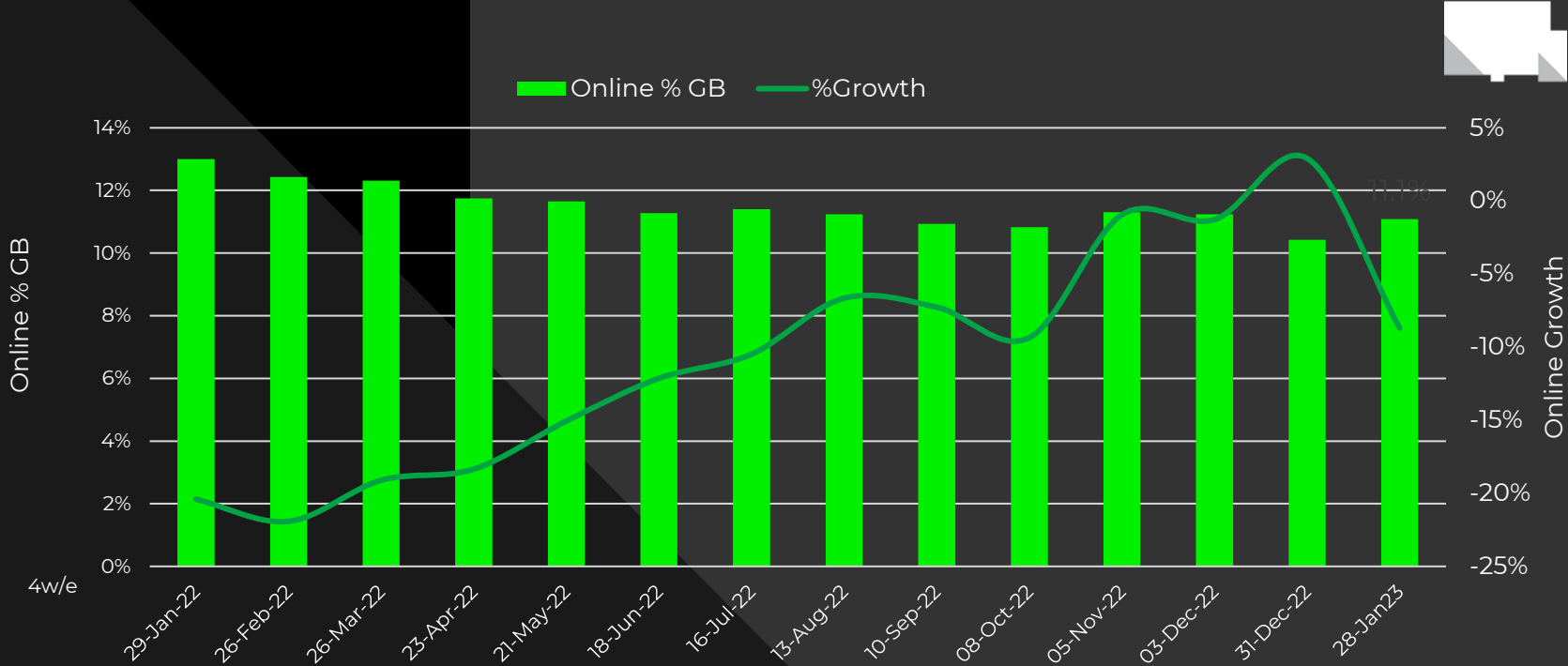
Total Store Channel growth
4w/e 28th January 2023 vs **Prior period**

Vs prior month



Source: NielsenIQ Scantrack Total Store Read, *Homescan FMCG, **Homescan Total FMCG

Despite a fall in sales against last year's pandemic driven comparatives, online share is stabilising at around 11%



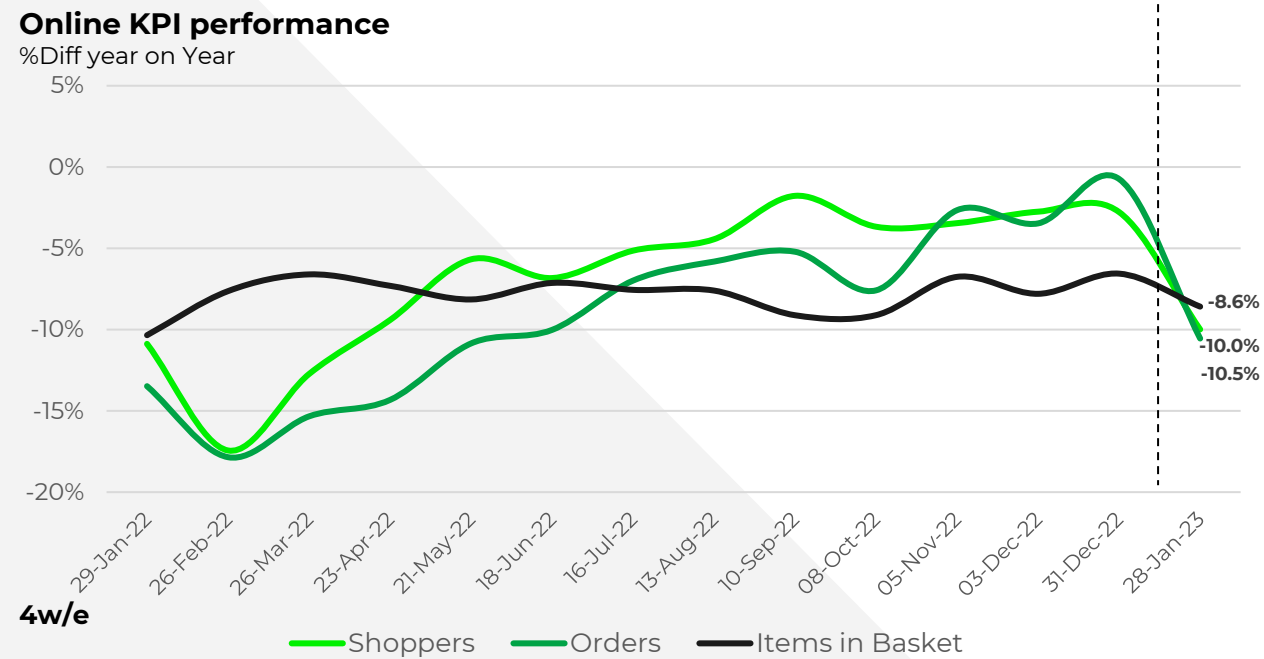


Against last year's omicron comparatives fewer shoppers shopped online and the average basket size is smaller



Despite the distorted comparatives, **online share is stabilising.**

Looking forward as shoppers look to **manage spend**, **online retailers** may need to encourage **more shoppers** and **orders** to help to **balance** the **declines** in **average basket size.**



Source: NielsenIQ Homescan FMCG

Sales plunged after the Xmas boost in January and with more focus on 'smaller baskets' Convenience stores grew ahead of Supermarkets

GB Total Coverage **FMCG** Sales, 4w/e 28th January 2023

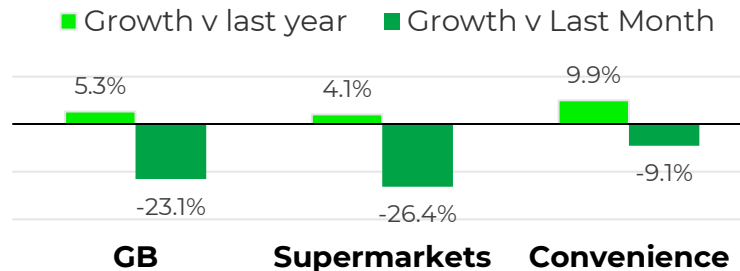
+£472m

Shoppers spent **MORE** on groceries than last year

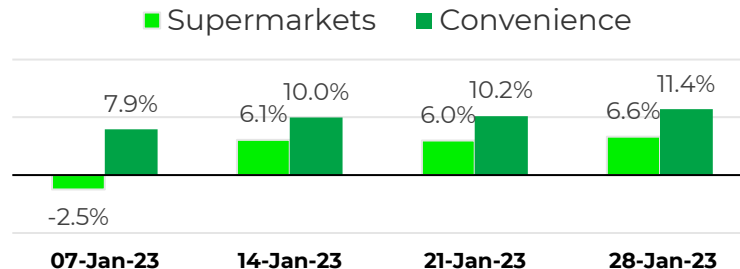
-£2.8Bn

MORE than 4w/e 28th December 2022

4 week ending (FMCG)



Weekly yoy value growth (FMCG)



*Supermarkets include Online Dark Stores, Depots and Picking stores

Supermarkets > 3,000sqft
Convenience < 3,000sqft

Healthier food, cheaper alternatives and emergency top ups were all on the shopper's agenda in January

Incremental Sales

4w/e 28th January 2023 vs **PRIOR** period

▶▶▶ With cold wet weather in January, shoppers will have focussed on New Year resolutions including a healthier diet and cutting back on expenses.

With back to work on the agenda, sales at the Supermarkets focussed on **Breakfast alternatives** including **Yoghurts, Fresh Fruit, Morning Snacks** and **Breakfast Cereals**. Shoppers also sought cheaper meal alternatives including **Canned Veg & Fish, Frozen Ready Meals** and with diet also top of mind shoppers also spent more on **Prep Fruit**.

As shoppers increasingly shopping for the moment **missions** played a key part in driving sales at **Convenience** stores in January. Shoppers spent more on Meals for tonight with **Fresh Ready Meals & Veg, Breakfast, Lunchtime Snacks** and **Sugar Confectionery**.

Supermarkets



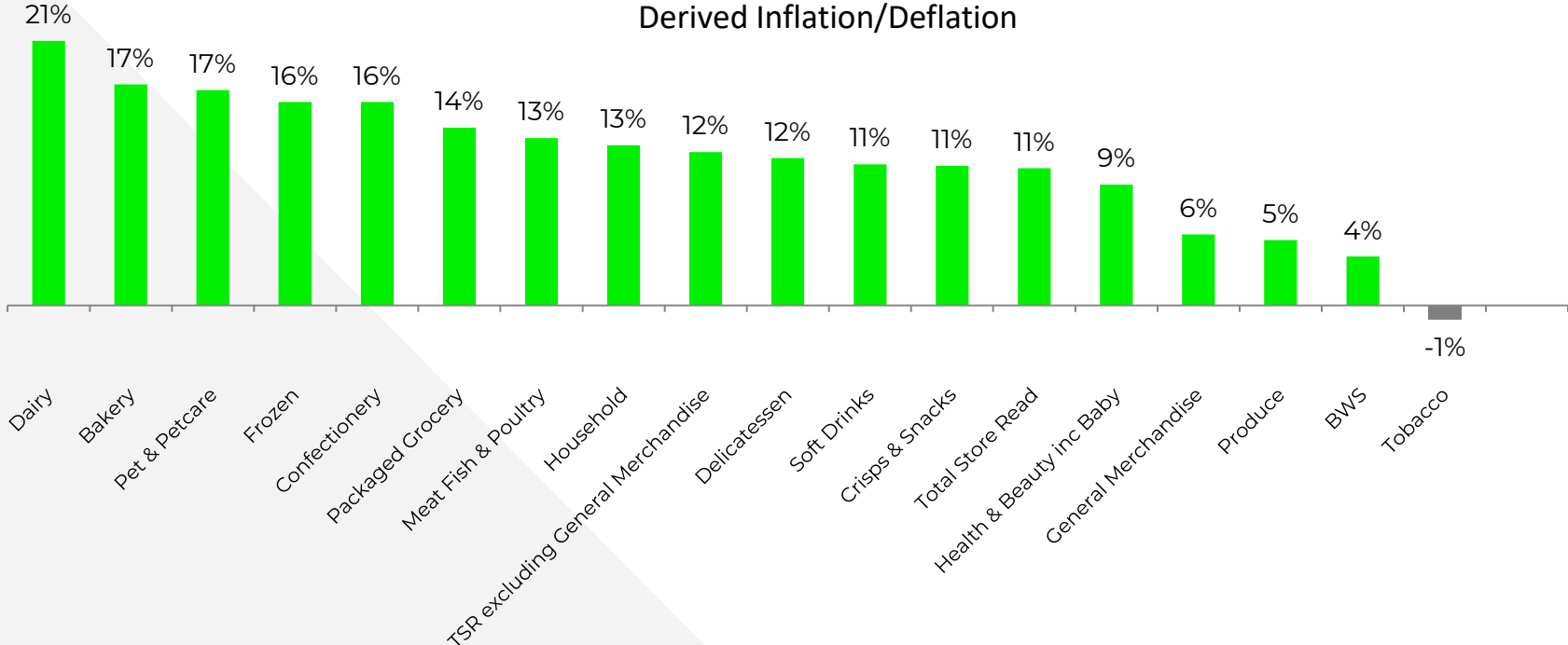
Yoghurts +£28m
Fresh Fruit +£20m
Morning Snacks +£12m
Breakfast Cereal +£11m
Salad +£10m
Cooking Sauces +£8m
Vms & Dietary Health +£6m
Rice & Grains +£6m
Canned Veg +£6m
Frozen Ready Meals +£6m
Detergents +£5m
Fresh Prep Fruit +£4m
Canned Fish +£4m

Convenience



Sports & Energy Drinks +£9m
Milk +£6m
Fresh Fruit +£6m
Salad +£3m
Fresh Veg +£3m
Yoghurts +£3m
Newspapers & Mags +£3m
Prep Salad +£3m
Sugar Confectionery +£3m
Breakfast Cereal +£2m
Fresh Ready Meals +£2m
Morning Gds & Spec Brds +£2m
Sandwiches +£2m

Shoppers are continuing to pay more for everyday items



Source: NielsenIQ Scantrack Grocery Multiples, 4we 28th Jan 2023

Derived Inflation: Difference between Value Sales growth and Unit Sales growth

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* TSR Excludes General Merchandise & Tobacco



Retailers are having to **remain agile**, adjusting to **significant month on month differences** in **household expenditure** as well as month on month **fluctuations** in **category preferences**.

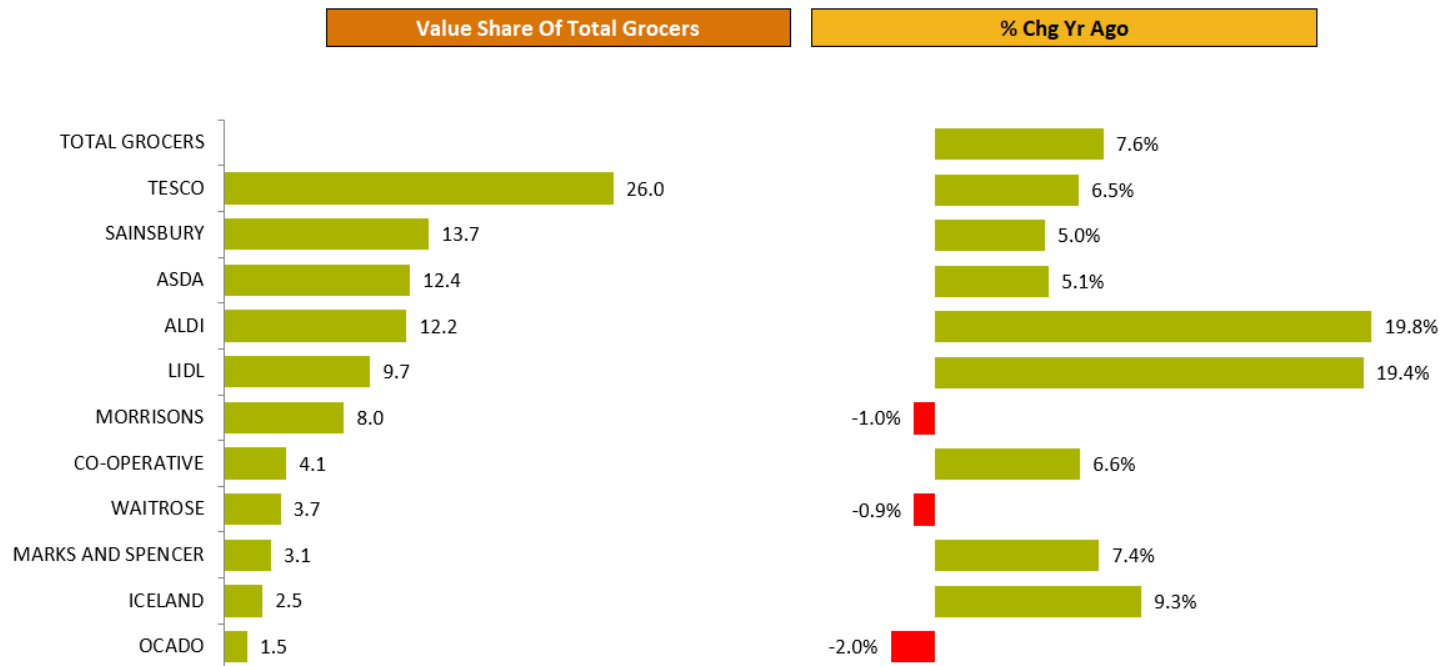
Driving loyalty to store is becoming **increasingly complex** as shoppers adjust to **smaller baskets**, as well as **cross channel** and an **omnishopping environment**.



Retailer News

Discounters gained significant market share in January

4 Weeks 28 JAN 2023



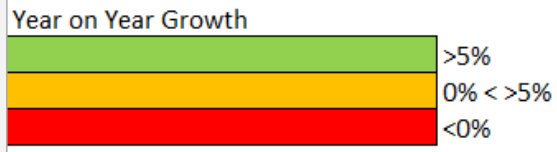
Source: NielsenIQ Homescan Total Till 4 weeks ending 28th Jan 2022

The big 4 supermarkets all lost market share

- 1 Aldi** (sales **+19.8%**) and **Lidl** (sales **+19.4%**), stole share where a mix of **cheaper prices** and a **limited range** will have helped more shoppers to stick to a budget in January.
- 2 Iceland growth** (**+9.3%**) was the **fastest** growing retailer (and against -11% year ago comparatives) and growth was ahead of the big supermarkets.
- 3 Sales fell** at **Morrisons** (**-1.0%**) with **Tesco** (**+6.5%**) just ahead of **ASDA** (**+5.1%**) and **Sainsbury's** (**+5.0%**).
- 4 M&S sales** momentum is still strong (**+7.4%**) but growths are still **weak** at **Waitrose** (**-0.9%**).
- 5 Ocado** trading against **-7.7%** comparatives, saw sales **decline of 2%** but still **gained share** within the **online channel**, helped by an almost **20% increase** in **shoppers** against this time last year.
- 6 Co-op sales** **+6.6%** grew ahead of the **Convenience channel** **+5.5%**, helped by the **colder weather** and a **return** of shoppers to local stores. Co-op benefited from a **7.4% increase** in **Frequency of Visit**.

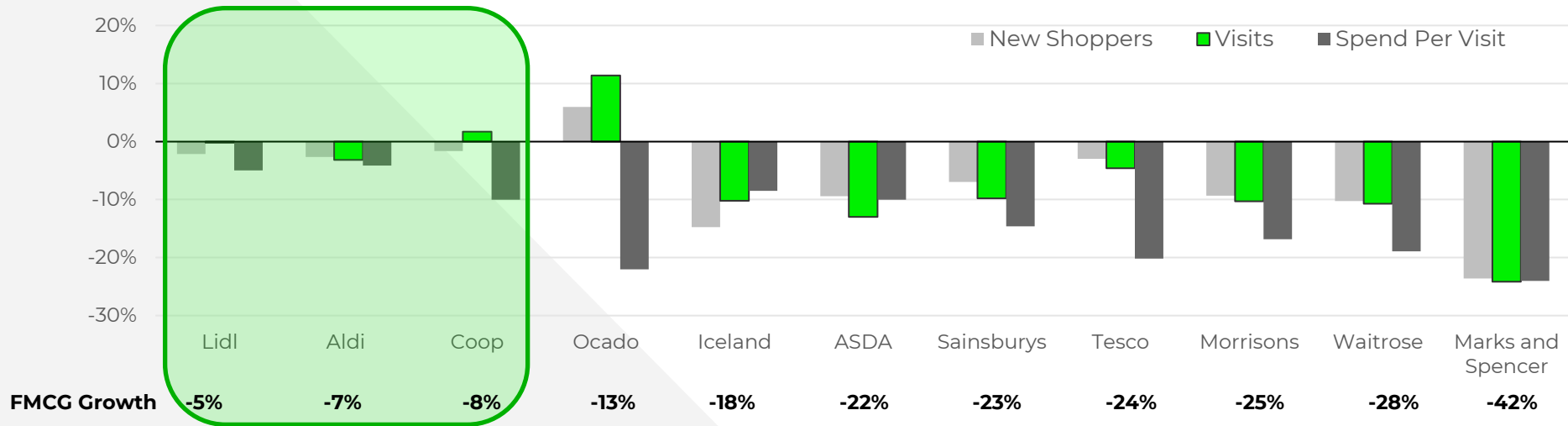
Only the Discounters attracted a significant increase in shoppers and bigger basket spends.

4w/e 28th January 2023 vs year ago	Total Till Growth	Penetration	Frequency	Value Per Visit
TOTAL GROCERS	Green	Red	Yellow	Yellow
Tesco	Green	Yellow	Yellow	Yellow
Sainsburys	Green	Yellow	Yellow	Red
ASDA	Green	Yellow	Yellow	Yellow
Morrisons	Red	Red	Yellow	Red
Waitrose	Red	Green	Red	Red
Marks and Spencer	Green	Yellow	Yellow	Yellow
Co-op	Green	Red	Green	Red
Iceland	Green	Yellow	Yellow	Yellow
Ocado	Red	Green	Red	Yellow
Aldi	Green	Green	Yellow	Green
Lidl	Green	Green	Yellow	Green

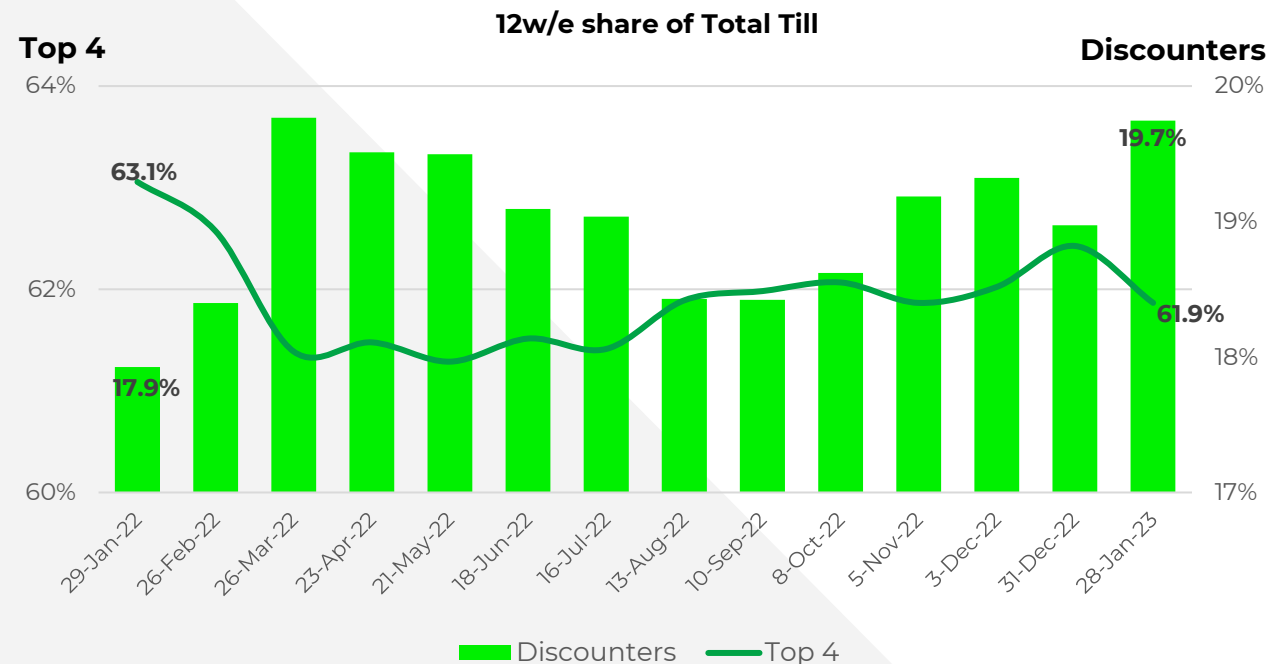


As the Discounters and Co-op were less prone to the seasonal spikes, the post Christmas dip in January was more shallow than at other retailers

4w/e 28th January 2023 vs 4w/e 31st December 2022



Discounter share is edging closer to 20% which is significantly ahead of last year



Source: NielsenIQ Total Till 12w/e 28th January 2023 vs year ago



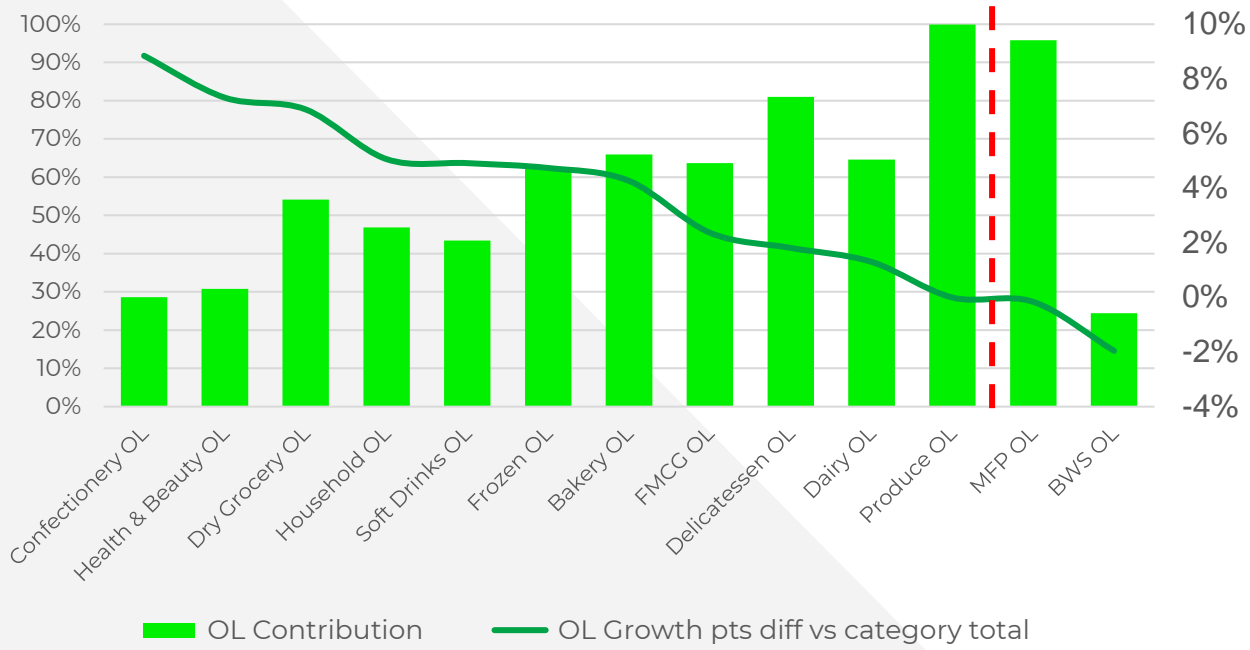
The **momentum** that started in autumn at the **Discounters** has **continued** into the New Year.

The battle ground for **shopper loyalty** is **intensifying**, as **'price'** moves further up their agenda.

OL has continued to outperform brands across most categories

OL YTD Contribution
Volume Sales

Growth
Differential



Switching to own label is known savings strategy and an easy switch for many shoppers.

Growth in OL will have been given a further boost in January by the increase in spend at the Discounters.

Source: NielsenIQ Homescan Total GB 4w/e 28Jan23 vs year ago



Advertising and Promotions

Retailer messages focused on Price, Price of Staples and Omni

January 2023 messages

Price

Every day staples

Online

Clubcard Prices
Spend less on big-brand products with our Great Value Event

Morrisons
Get **+\$1** in your Cashpot*

WAITROSE & PARTNERS
GREAT SAVINGS EVENT

Morrisons
SAVERS
+ GREAT VALUE +
Savers
Bringing you everyday staples at affordable prices. Your weekly shop has never been simpler, or saved you more.

WAITROSE & PARTNERS
SAVE UP TO **25%**
CUPBOARD CLASSICS

Morrisons
Delivery slots now from just **£1.50**
Delivery slots from £1.50
We've cut the price of selected delivery slots, so you can now book a slot from just £1.50! Save time and fuel and order online today.

PRICES LOCKED LOW
Prices Locked Low
We've lowered and locked 100's of prices online.

Sainsbury's
ALDI PRICE MATCH
Sainsbury's quality at Aldi Prices*
Shop Price Match

Sainsbury's
£12 Meal deal
2 pizzas, 2 sides & a dip for £12

M&S
More than **100** customer favourites will be price locked until the end of January 2023 alongside price benchmarked Remarksable Value staples

ASDA
More choice at **£2 or less** than other supermarkets

ocado
Low prices locked in 'til March
Cheddar and pasta. Clementines and kidney beans. They're just some of the essentials included in our Everyday Savers Shop.
And now we're locking the prices on all our Everyday Savers until March -- that's 160 products not moving.
Shop Everyday Savers

Sainsbury's
£1 delivery slots
We've got even more **£1** saver slots
*Applies to 4hr flexible saver slots only

Morrisons
GREAT SAVINGS EVENT
There's a £1.50 off on 100's of everyday staples. We've lowered and locked 100's of prices online.

WAITROSE & PARTNERS
CUPBOARD CLASSICS
Our latest collection of Super Saver recipes are super simple and also super healthy with fresh, healthy, seasonal produce, no sugar or chemical preservatives, and a mix with delicious flavours.

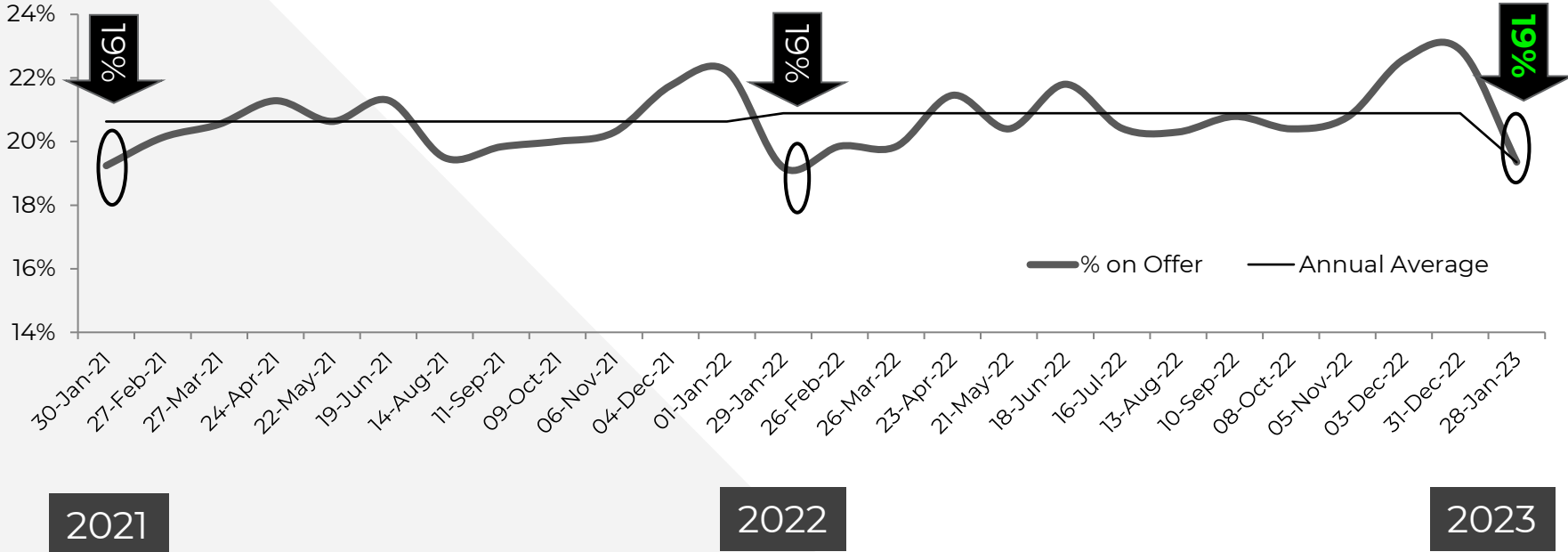
Sainsbury's
£10 Meal Deal
2x mains, 2x sides, 1x drink

Source: Retailer Source: Retailer Marketing including Digital and Press, Retailer Websites



After the seasonal sales push for sales growth in December, sales on promotion dipped back to 19%, in line with other January's


% Exp On Offer: FMCG



Source: NielsenIQ Homescan Grocery Multiples 4w/e

Ocado, Iceland and M&S all sold more on promotion than last year, with only ASDA and the Discounters selling less

% Value sales bought on offer



Grocery Multiples
19% (**0%** points)

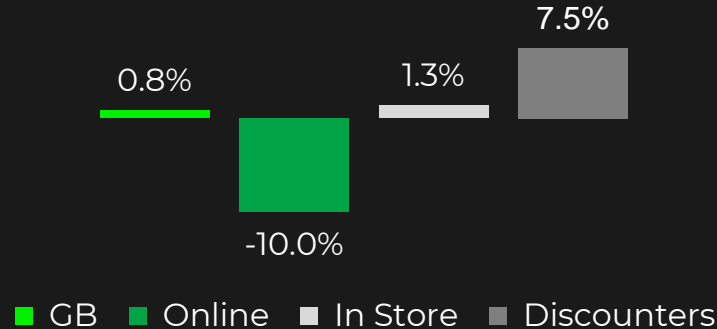
	% Value sales bought on offer	+/- % pts vs last year
Ocado	■ 39%	■ +9%
Waitrose	■ 32%	■ +3%
Iceland	■ 31%	■ +7%
Co-op	■ 29%	■ 0%
Morrisons	■ 26%	■ +1%
M&S	■ 25%	■ +4%
Tesco	■ 23%	■ +1%
Sainsbury's	■ 22%	■ +3%
ASDA	■ 14%	■ -5%
Lidl	■ 8%	■ -1%
Aldi	■ 4%	■ -1%



What's next?

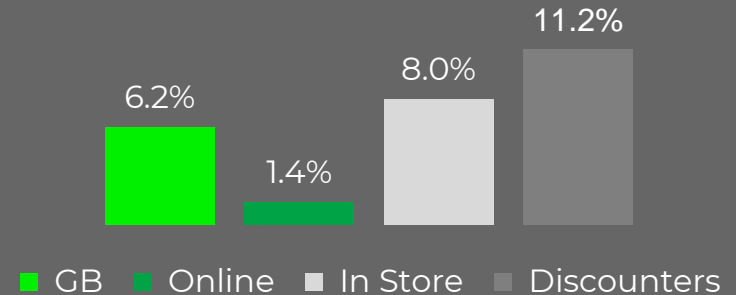
If baskets are getting smaller, retailers will need to attract more shoppers and more occasions to drive overall spend

Shoppers

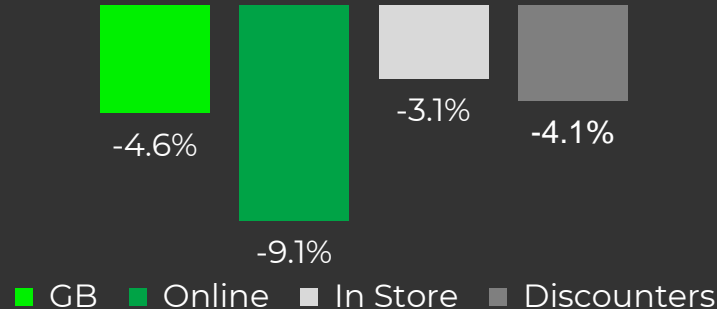


Spend (£ per Buyer)

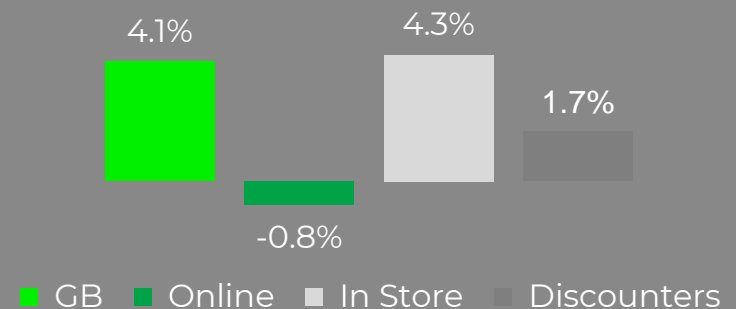
% Growth in January



Volume (Units per Buyer)



Trips (Occasions per Buyer)



The first quarter is expected to remain challenging, with inflation very much top of mind for shoppers

1

Prices remain **top of mind** for all shoppers, with those **most impacted** by falls in disposable income, continuing to **switch** to **cheaper brands** and **Own Label**.

In the final quarter of 2022, whilst sales of **Economy Own Label** increased **77%**, this still only accounted for **1%** of **all store sales** with **Standard Private Label** (sales **+6.6%**) the **'safe haven'** for **most** shoppers and **accounting** for **36.5%** of **all** sales (NielsenIQ Scantrack Grocery Multiples).

2

In January, there was **even stronger Private Label growth** in **Frozen, Ambient Grocery** and **Household** indicative of the money saving sentiment at the start of the year (NielsenIQ Homescan FMCG).

NielsenIQ Homescan research also shows that when **consumers** are **cash poor**, they shop **more frequently** and **across more** retailers, simply because they can **only afford** to shop for Groceries **'little and more often'** to help their household budgets.

3

Nearly 3 out of 4 households are now **fearing** they will be **severely** or **moderately affected** by the cost of living crisis in the first part of 2023, this is **up** from **54%** at the **end of last year**.

The expectation is that the current trends of **managing overall basket spends**, by **buying less, trading down** to **cheaper products** and **switching** spend to **Discounters** will **continue** and probably until **Easter** when **family gatherings** and hopefully **better weather** will bring a **boost** to sales.



Appendix

Inflation continues to drive value sales, in core grocery categories, end of season sales will have brought a short boost to general merchandise.

Grocery Multiples Value Sales Growth	y/e 28JAN23	12w/e 28JAN23	4w/e 29JAN22	4w/e 08OCT22	4w/e 05NOV22	4w/e 03DEC22	4w/e 31DEC22	4w/e 28JAN23
Bakery	8.5%	14.6%	4.6%	11.3%	10.8%	12.9%	18.1%	12.6%
BWS	-7.6%	-1.4%	-14.2%	-4.4%	-3.3%	-1.5%	0.1%	-4.7%
Confectionery	1.4%	6.4%	-1.9%	1.3%	-3.6%	3.5%	8.9%	6.5%
Crisps & Snacks	7.7%	11.6%	6.5%	11.5%	13.7%	13.0%	12.8%	8.6%
Dairy	6.9%	13.7%	-3.5%	11.8%	13.1%	14.0%	15.5%	11.5%
Delicatessen	6.3%	7.4%	10.9%	5.9%	5.6%	7.0%	9.4%	5.6%
Frozen	3.3%	11.3%	-10.9%	7.0%	8.1%	11.8%	12.9%	8.9%
General Merchandise	-3.6%	1.6%	-6.7%	2.5%	-1.2%	-2.9%	6.2%	0.0%
Health & Beauty inc Baby	8.1%	9.3%	9.5%	3.1%	3.7%	5.9%	14.0%	7.4%
Household	3.0%	8.1%	-1.1%	3.9%	6.1%	8.2%	10.9%	5.1%
Meat Fish & Poultry	-0.8%	5.4%	-8.5%	2.8%	3.9%	4.8%	8.0%	2.5%
Packaged Grocery	3.1%	9.8%	-8.2%	6.2%	7.5%	9.2%	12.8%	7.1%
Pet & Petcare	12.6%	12.9%	8.0%	12.9%	14.0%	12.5%	15.8%	10.4%
Produce	-3.8%	-1.8%	-4.4%	-3.1%	-1.9%	-1.7%	0.0%	-3.6%
Soft Drinks	9.3%	9.8%	5.7%	6.3%	9.6%	10.0%	10.9%	8.2%
Tobacco	-5.0%	-7.7%	2.1%	-8.3%	-7.0%	-7.1%	-7.3%	-8.8%
Total Store Read	1.5%	5.8%	-2.7%	3.3%	3.8%	4.8%	8.0%	3.9%
TSR excluding General Merchandise & Tobacco	2.4%	7.0%	-2.7%	4.2%	4.9%	6.4%	9.0%	5.1%

Source: NielsenIQ Scantrack Total Store Read Grocery Multiples

Volume trends weakened in January, as shoppers trimmed items out of their baskets, worst impacted was Meat, Fish & Poultry

Grocery Multiples Units Sales Growth	y/e 28JAN23	12w/e 28JAN23	4w/e 29JAN22	4w/e 08OCT22	4w/e 05NOV22	4w/e 03DEC22	4w/e 31DEC22	4w/e 28JAN23
Bakery	-3.6%	-2.5%	-1.9%	-4.6%	-4.7%	-3.3%	0.4%	-4.7%
BWS	-9.7%	-4.4%	-16.0%	-6.9%	-4.9%	-3.6%	-2.9%	-8.5%
Confectionery	-4.8%	-4.0%	-3.2%	-6.7%	-10.8%	-5.2%	1.0%	-9.4%
Crisps & Snacks	-0.8%	1.5%	1.7%	-0.3%	3.1%	3.7%	2.7%	-2.4%
Dairy	-6.8%	-6.6%	-7.6%	-7.2%	-6.2%	-6.3%	-4.5%	-9.2%
Delicatessen	-2.6%	-4.1%	5.3%	-5.1%	-5.5%	-4.4%	-2.0%	-5.9%
Frozen	-7.6%	-4.8%	-15.6%	-5.8%	-5.5%	-4.4%	-3.2%	-7.0%
General Merchandise	-8.2%	0.5%	-7.6%	-7.0%	-7.6%	-4.8%	1.8%	-5.6%
Health & Beauty inc Baby	1.1%	0.4%	3.0%	-4.6%	-3.8%	-2.0%	5.0%	-2.1%
Household	-7.3%	-5.0%	-5.8%	-9.4%	-7.3%	-5.0%	-2.4%	-7.4%
Meat Fish & Poultry	-9.4%	-6.8%	-10.1%	-7.8%	-7.4%	-6.8%	-3.2%	-10.6%
Packaged Grocery	-5.9%	-3.6%	-12.6%	-4.4%	-4.5%	-3.5%	-0.6%	-6.8%
Pet & Petcare	-2.5%	-3.2%	-0.7%	-5.2%	-2.2%	-2.5%	-0.7%	-6.5%
Produce	-7.9%	-6.7%	-8.0%	-8.3%	-7.2%	-6.5%	-4.9%	-8.7%
Soft Drinks	0.2%	-1.4%	0.0%	-2.4%	0.7%	-1.0%	-0.4%	-2.9%
Tobacco	-8.5%	-7.4%	-2.8%	-12.1%	-9.9%	-8.0%	-6.6%	-7.7%
Total Store Read	-5.5%	-4.0%	-6.4%	-5.9%	-5.4%	-4.3%	-1.5%	-6.9%
TSR excluding General Merchandise & Tobacco	-5.3%	-4.2%	-6.4%	-5.8%	-5.3%	-4.2%	-1.7%	-7.0%

Source: NielsenIQ Scantrack Total Store Read Grocery Multiples



Thank you.