Ireland Organic Market Overview

Kantar 52 wks w/e 6 Sept 2020

9/11/2020

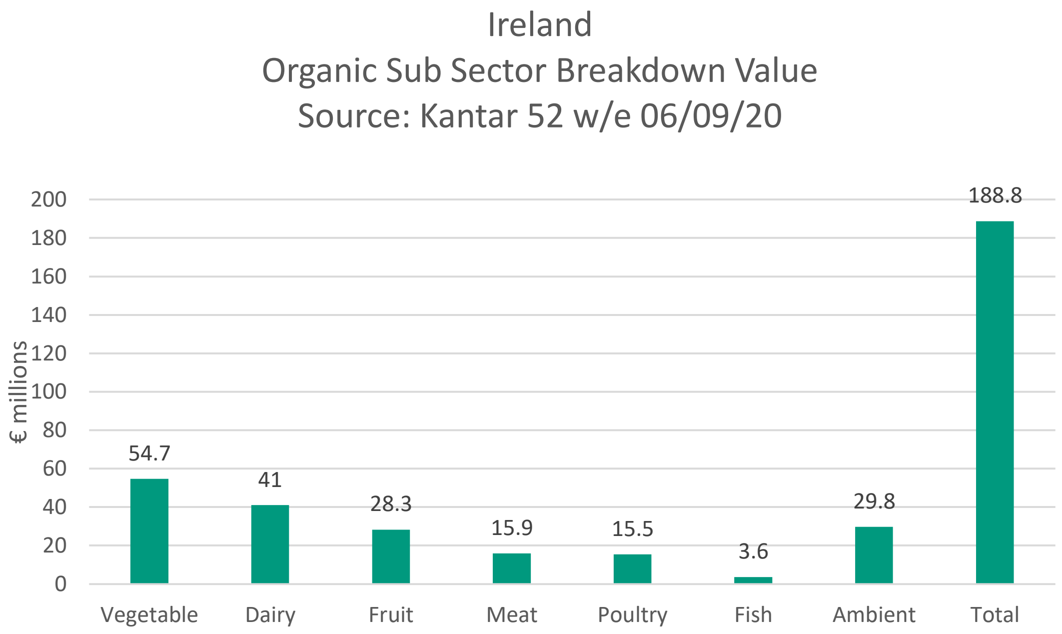
BORD BIA
IRISH FOOD BOARD

Market Value : Ireland

Organic Produce growing ahead of Total Grocery in Ireland

2020 €189m
+16.2% Growth

4.2% ahead of Total Retail Sales
52 wk w/e 06/09
Source: Kantar October 2020



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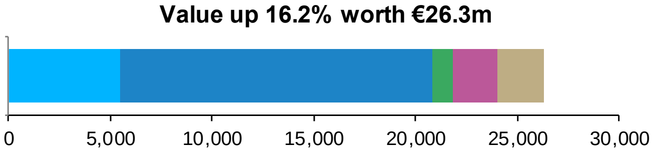
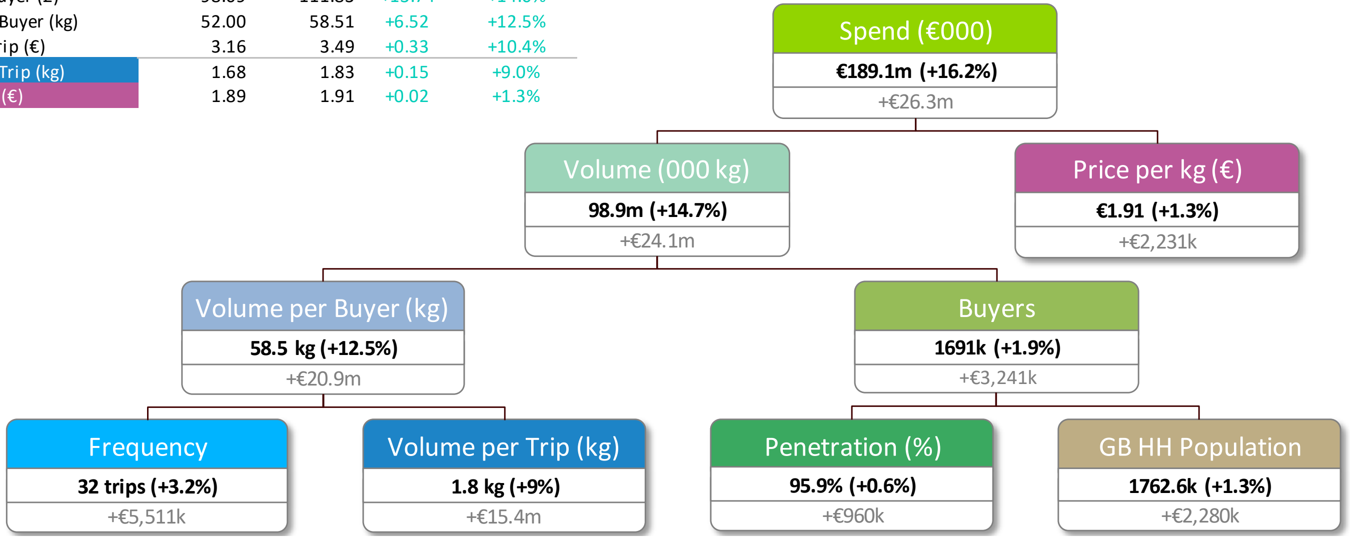
Source: Kantar 52 wk W/E 06/09, Soil Association 10/20 , Nielsen 2020

Total Organic growth valued at €189m and growing 16.2% year on year has been driven by volume and frequency of shop.

Total Organic

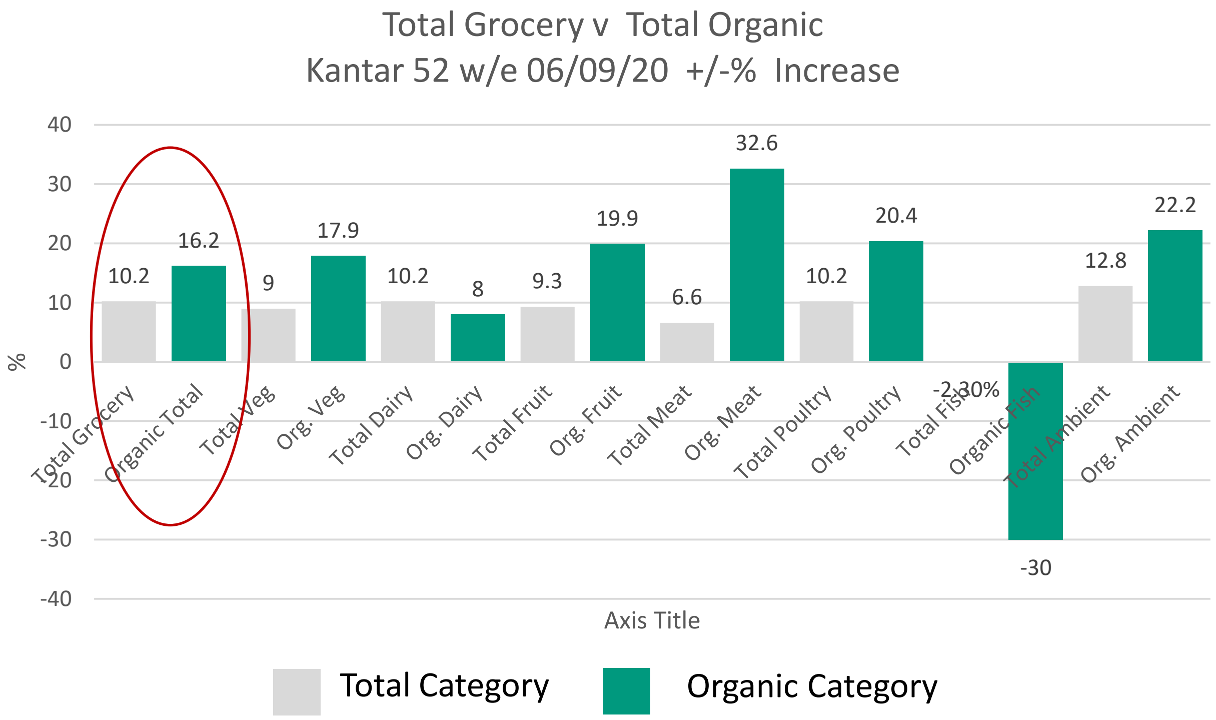
Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	162,762	189,100	+26,338	+16.2%
Volume (000 kg)	86,283	98,949	+12,667	+14.7%
Penetration (%)	95.40	95.94	+0.54	+0.6%
Frequency	31.03	32.04	+1.00	+3.2%
Spend per Buyer (£)	98.09	111.83	+13.74	+14.0%
Volume per Buyer (kg)	52.00	58.51	+6.52	+12.5%
Spend per Trip (€)	3.16	3.49	+0.33	+10.4%
Volume per Trip (kg)	1.68	1.83	+0.15	+9.0%
Price per kg (€)	1.89	1.91	+0.02	+1.3%





Total Value Grocery v Total Value Organic

Total Organic growing ahead of Total Grocery specifically in Organic Meat, Ambient, Veg, Fruit and Poultry (Hens Eggs)



Strong Organic Category Performance: Additional €26.3m into category.



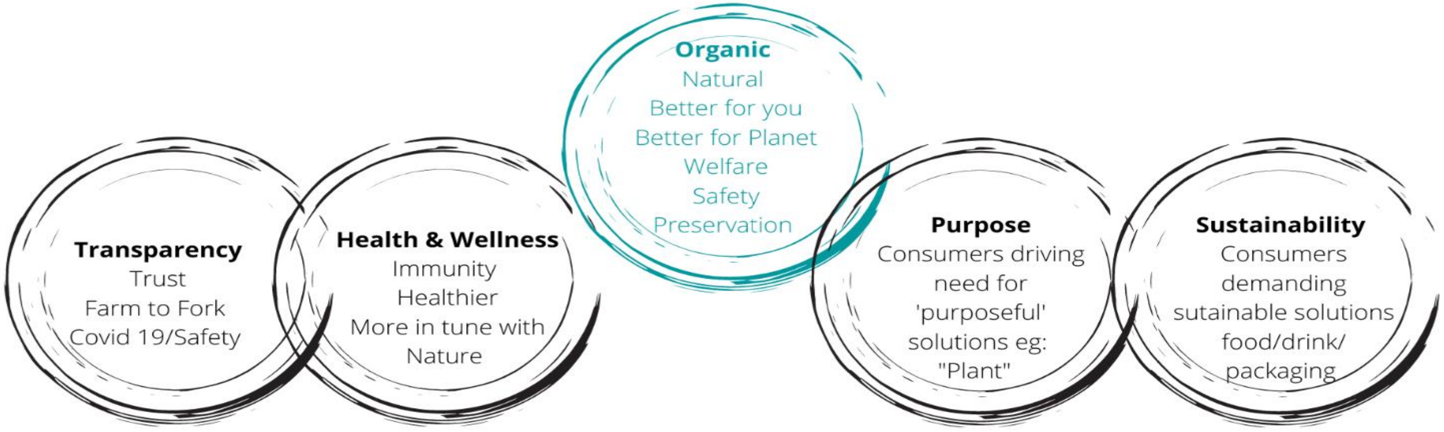




	Vegetables	Dairy	Fruit	Meat	Poultry (inc. Hen)	Fish	Ambient
Value	€54.7m	€41m	€28.3m	€15.9m	€15.5m	€3.6m	€29.8m
Share of Fresh Organic	34.4%	25.8%	17.8%	10%	9.7%	2.3%	
+/-% Change Growth	17.9%	8%	19.9%	32.6%	20.4%	-30%	22.2%
Drivers	**Avg Price Increase**	**Volume New Shoppers**	**New Shoppers Avg Price Increase**	**Frequency**	**New Shoppers**	**Loss of Shoppers**	**New Shoppers Volume Frequency**
Top Retailer Share Value	**Supervalu**	**Dunnes**	**Supervalu**	**Supervalu**	**Lidl**	**Dunnes**	**Supervalu**

UK & Ireland Insights

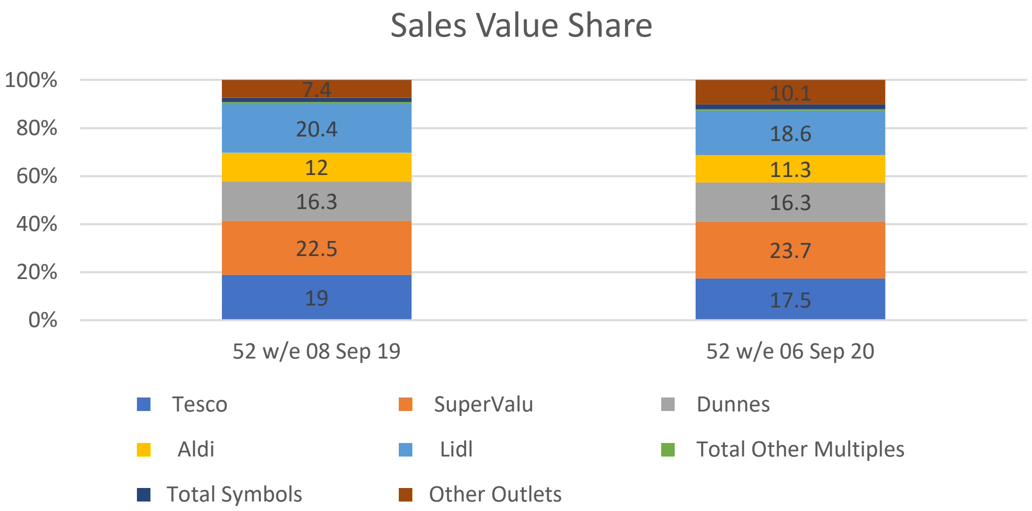
The Organic Sector continues to deliver on evolving Consumer Needs



- The Organic market drove more sales then non organic during the early months of the Covid 19 pandemic.
    - UK Kantar 18.7% increase in sales v 14.2% of non organic equivalents 12 wks end of May.

Retailer Value Share: Supervalu continues to hold overall % share of Organic category although weakening in some sub-categories notably Dairy.

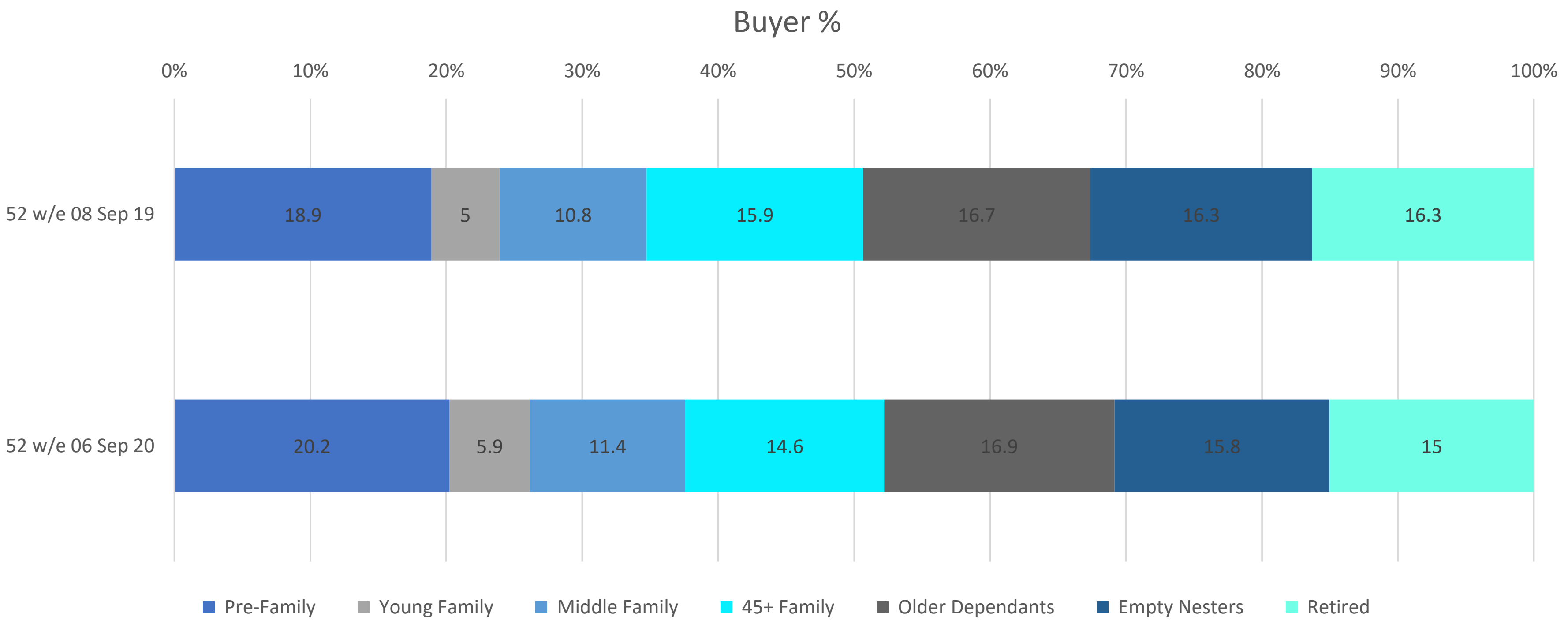
Although Tesco, Lidl have lost share they have increased sales year on year.
Dunnes market share is static but they have increased sales by 16% year on year.



	YoY % Sales Change
Tesco	6%
SuperValu	21%
Dunnes	16%
Aldi	8%
Lidl	5%
Total Other Multiples	-26%
Total Symbols	45%
Other Outlets	57%

Overall there have been increases within the younger shopper buying into Organic food, Pre-Family seeing the largest jump.

Total Organic



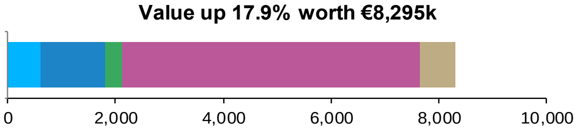
Organic Vegetables

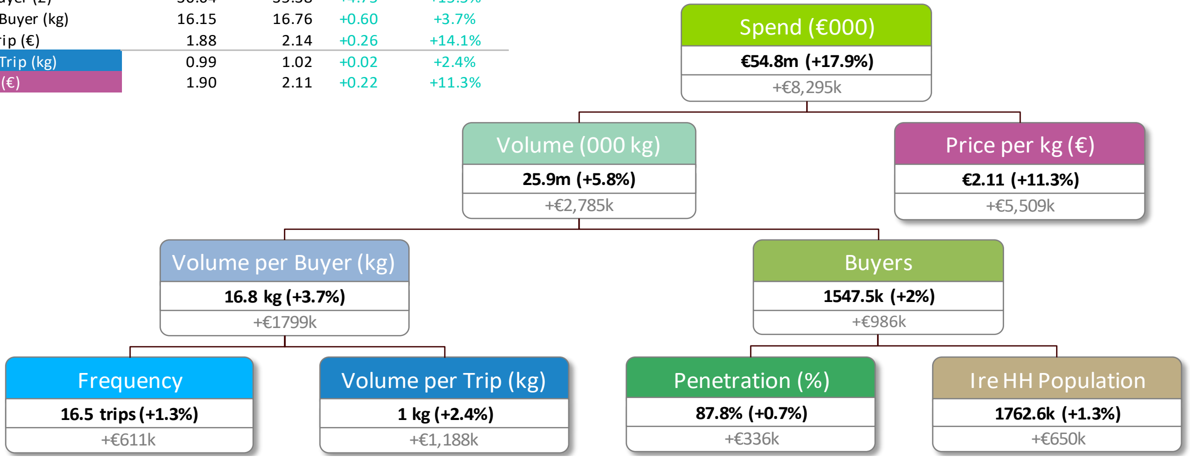
- The Biggest of the Organic categories Vegetables metrics are all positive. Category valued at €54.7m and growing at 17.9% year on year by average price increase.
- Organic Vegetables growing ahead of Total Vegetables which has a value of +€896m and a growth rate of 9% year on year driven by increase in volume per trip.
- Retailer Activity: Supervalu holds number one position in Vegetables with 28.3% value market share and has seen a 43% increase in sales year and 50% volume increase on year.
- Lidl holds no. 1 spot in volume share with 31.4% but has lost share and is in decline -5% yoy.
- Pre-Families hold share in category at 18.4% but Retired shoppers are driving growth within Vegetables. (The opposite to Fruit.)

The Biggest of the Organic categories Vegetables metrics are all positive. Category valued at €54.7m and growing at 17.9% year on year. The growth is driven by increases in average price.

Organic Vegetables is ahead of the Total Vegetable category which has growth of 9% yoy.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	46,464	54,759	+8,295	+17.9%
Volume (000 kg)	24,498	25,931	+1,433	+5.8%
Penetration (%)	87.19	87.80	+0.60	+0.7%
Frequency	16.30	16.50	+0.20	+1.3%
Spend per Buyer (£)	30.64	35.38	+4.75	+15.5%
Volume per Buyer (kg)	16.15	16.76	+0.60	+3.7%
Spend per Trip (€)	1.88	2.14	+0.26	+14.1%
Volume per Trip (kg)	0.99	1.02	+0.02	+2.4%
Price per kg (€)	1.90	2.11	+0.22	+11.3%

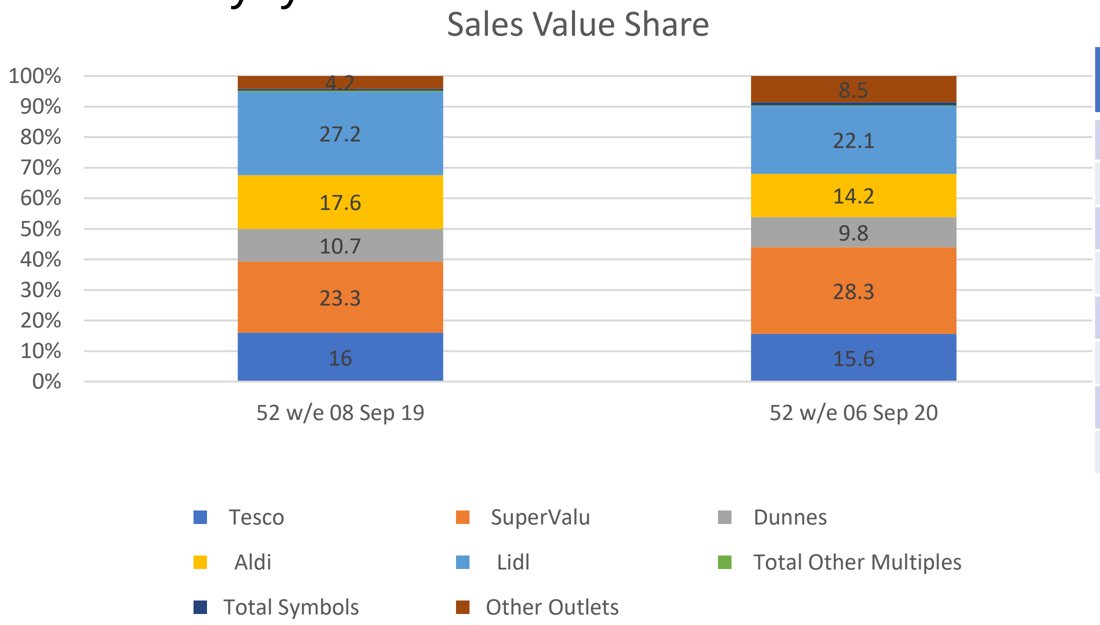




Source: Kantar: 52 w/e 06 Sep 20 vs LY

Supervalu holds number one position in Vegetables with 28.3% value market share and has seen a 43% increase in sales year and 50% volume increase on year.

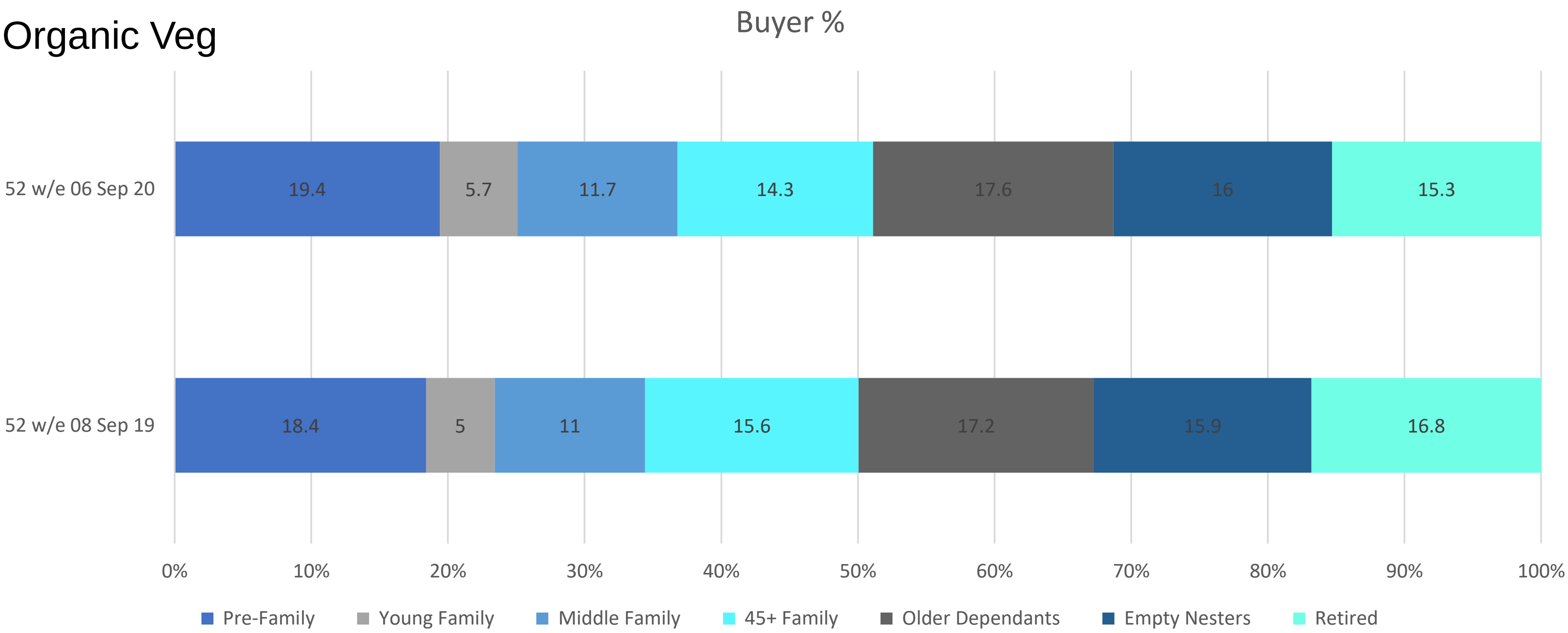
Lidl holds no. 1 spot in volume share with 31.4% but has lost share and is in decline -5% yoy.



Retailers	Value +/-% Change	Volume +/-% Change
Tesco	15%	-2%
Supervalu	43%	50%
Dunnes	9%	-2%
Aldi	-5%	-8%
Lidl	-4%	-5%
Total Other Mults	-26%	-19%
Total Symbols	97%	41%
Other Outlets	141%	99%

Pre-Families hold share in category at 18.4% but Retired shoppers at 16.8% are driving growth within Vegetables. (The opposite to Fruit.)

Organic Veg



Organic Dairy

- Organic Dairy value at €41m has seen an increase of 8% in sales year on year. This is driven by new shoppers entering the category and volume per trip increases.
- Organic Dairy is behind Total Dairy which is valued at €1,239b and driving volume growth of 10.2% with significant volume per trip increases.
- Supervalu has lost top share spot to Dunnes Stores. Dunnes and Discounters especially Aldi performing well year on year.
- Tesco holds No. 1 spot in terms of volume share at 21.3% closely followed by Dunnes and Lidl on 21%.
- In Organic Dairy Pre-Families hold largest share of 19.3% share but Older Dependants and Middle Families are driving growth.

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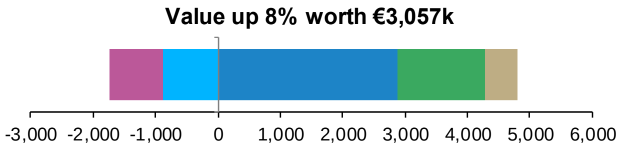
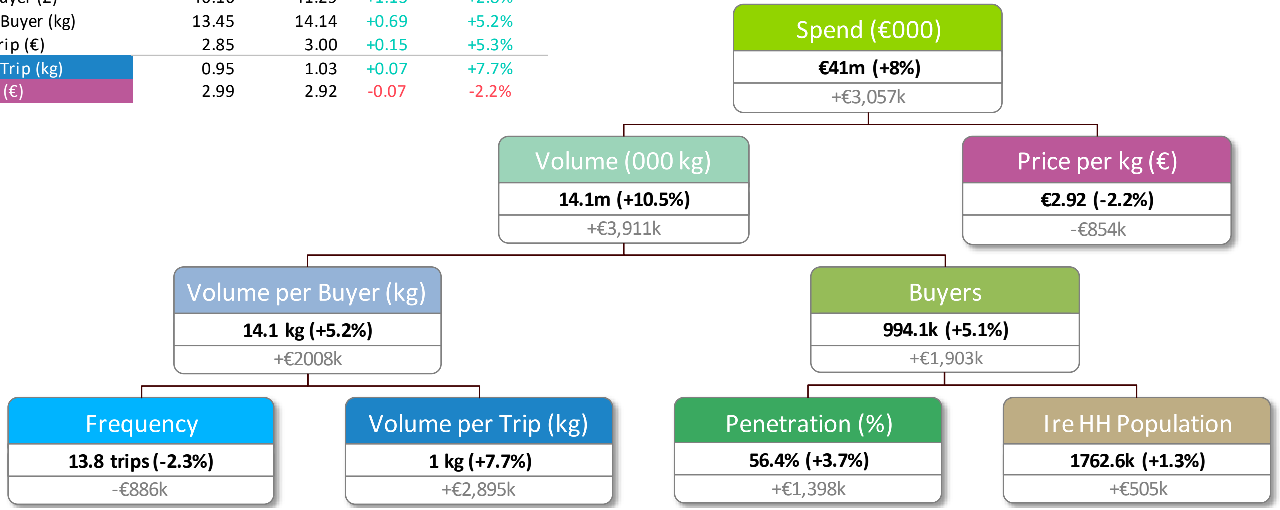
Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	37,993	41,050	+3,057	+8.0%
Volume (000 kg)	12,723	14,061	+1,338	+10.5%
Penetration (%)	54.39	56.40	+2.01	+3.7%
Frequency	14.10	13.77	-0.33	-2.3%
Spend per Buyer (£)	40.16	41.29	+1.13	+2.8%
Volume per Buyer (kg)	13.45	14.14	+0.69	+5.2%
Spend per Trip (€)	2.85	3.00	+0.15	+5.3%
Volume per Trip (kg)	0.95	1.03	+0.07	+7.7%
Price per kg (€)	2.99	2.92	-0.07	-2.2%





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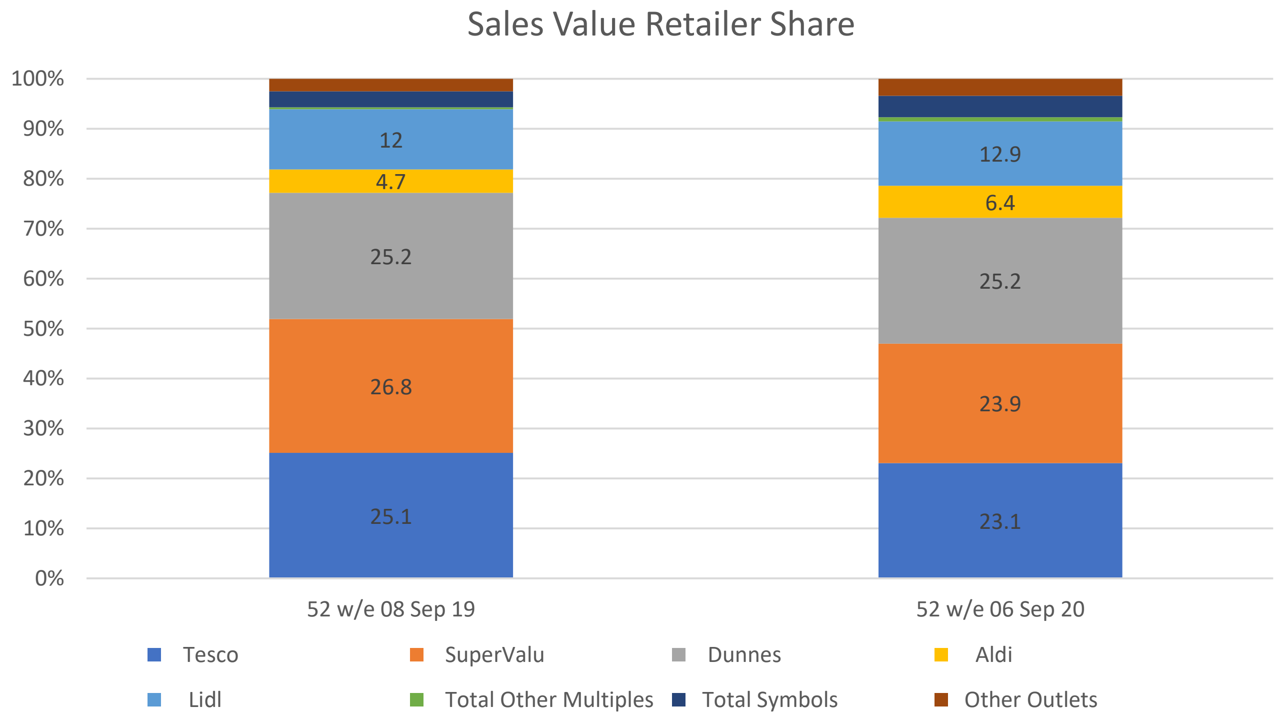
Source: Kantar: 52 w/e 06 Sep 20 vs LY

In Dairy Supervalu lost top spot to Dunnes Stores. Dunnes and the Discounters performing well year on year.



Retailer	Value +/- % YOY	Volume +/-%
Tesco	-1%	0%
Supervalu	-4%	-8%
Dunnes	8%	23%
Aldi	47%	42%
Lidl	16%	9%
Total Other Multiples	111%	146%
Total Symbols	44%	41%
Other Outlets	48%	43%

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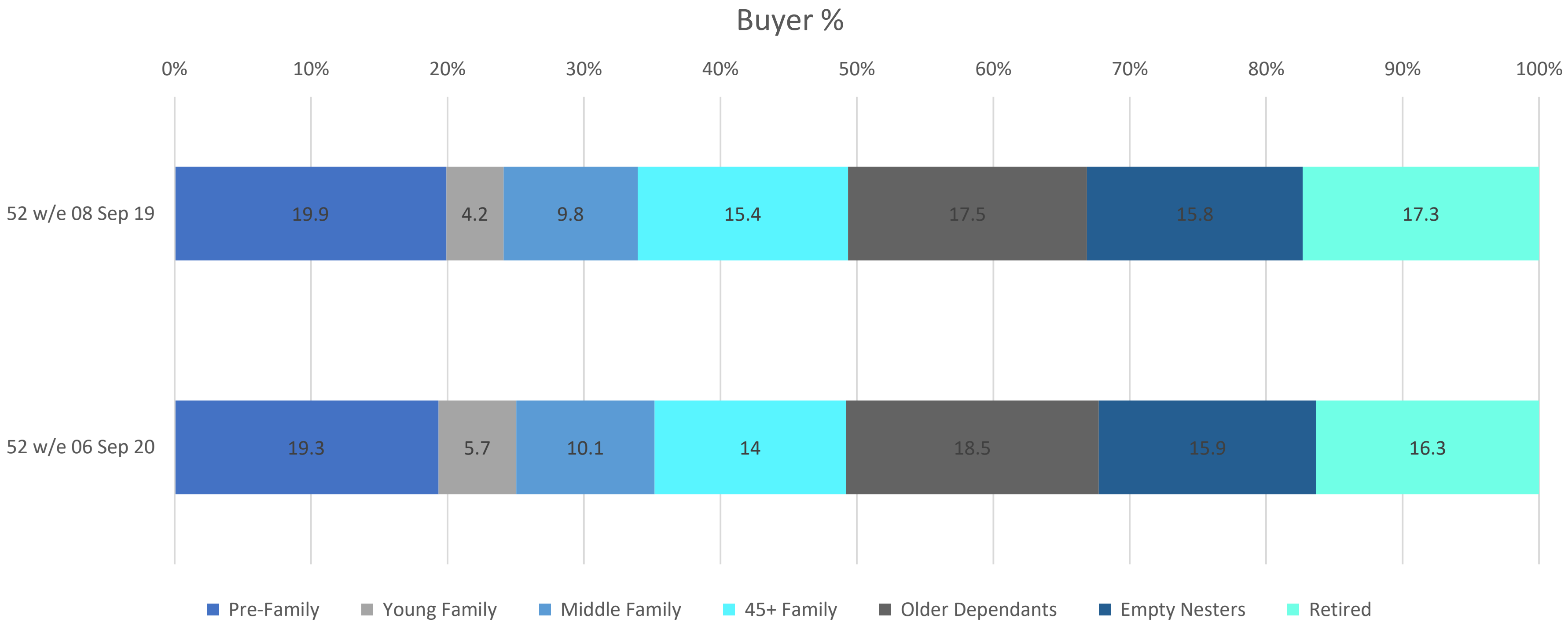
Source: Kantar: 52 w/e 06 Sep 20 vs LY

In Organic Dairy Pre-Families hold 19.3% share but Older Dependants and Middle Families are driving growth.



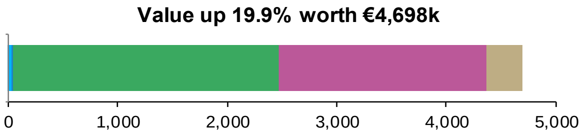
Organic Fruit

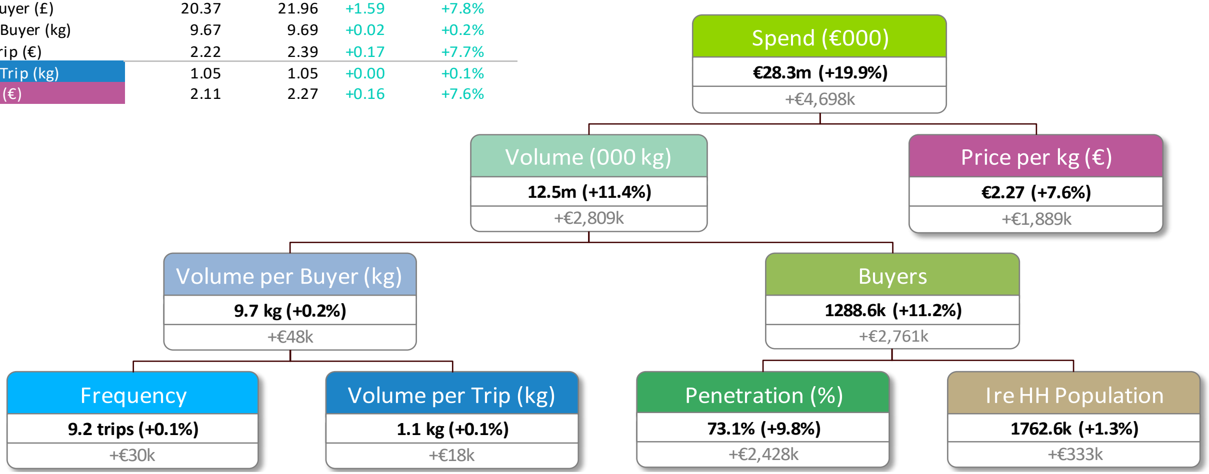
- Organic Fruit valued at €28.3m is in growth year on year gaining new shoppers into the category ahead of all other sub categories. Driving additional value of nearly 20% into the category.
- Organic Fruit is ahead of Total Fruit value growth of 9.3% year on year which is driven by volume per trip and average price increase.
- Supervalu holding top spot in share at 24.2% with double digit sales growth yoy but value market share of the top 3 Retailers, Supervalu, Lidl and Tesco is down year on year.
- Lidl although losing 2.9 % value share points holds No. 1 position in volume share and has gained in value and volume year on year.
- The younger segments of pre-families, young families, and middle families increasing share in the category along with older dependents.

Organic Fruit valued at €28.3m is in growth gaining new shoppers into the category ahead of all other sub categories and an average price increase.

Driving additional value of nearly 20% into the category ahead of Total Category which had growth of 9.3% yoy.

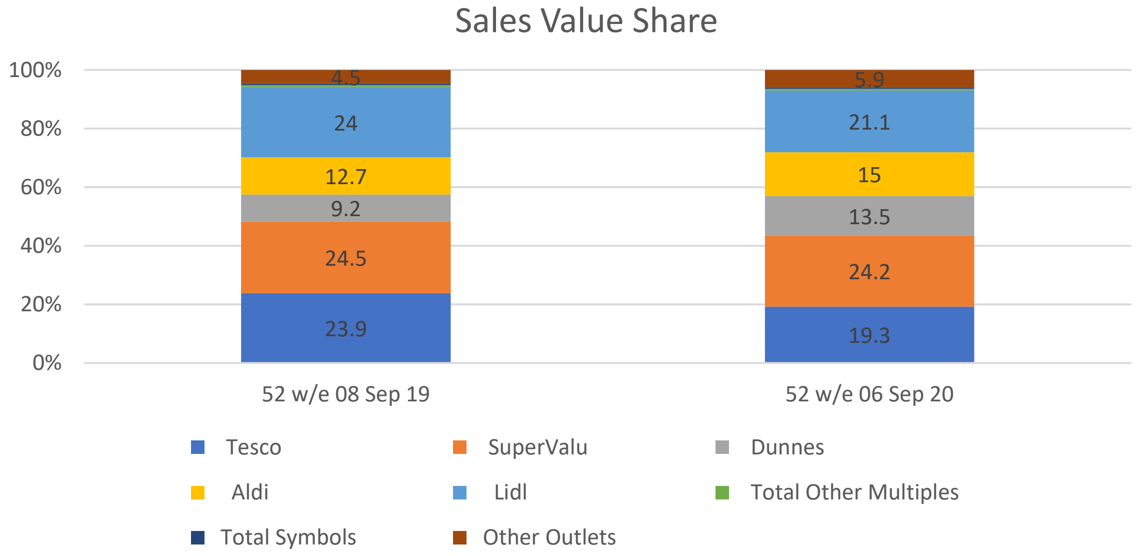
Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	23,602	28,300	+4,698	+19.9%
Volume (000 kg)	11,203	12,485	+1,282	+11.4%
Penetration (%)	66.61	73.11	+6.50	+9.8%
Frequency	9.18	9.19	+0.01	+0.1%
Spend per Buyer (£)	20.37	21.96	+1.59	+7.8%
Volume per Buyer (kg)	9.67	9.69	+0.02	+0.2%
Spend per Trip (€)	2.22	2.39	+0.17	+7.7%
Volume per Trip (kg)	1.05	1.05	+0.00	+0.1%
Price per kg (€)	2.11	2.27	+0.16	+7.6%





Supervalu holding top spot with 24.2% with double digit sales growth yoy.

Lidl although losing 2.9% share points have gained in value and volume year on year.
Aldi has grown share to 15% and has witnessed double digit growth in value and volume yoy.
Dunnes has gained 4.3% share points and showing strong performance year on year.
Tesco performance poor losing value and volume in this category.

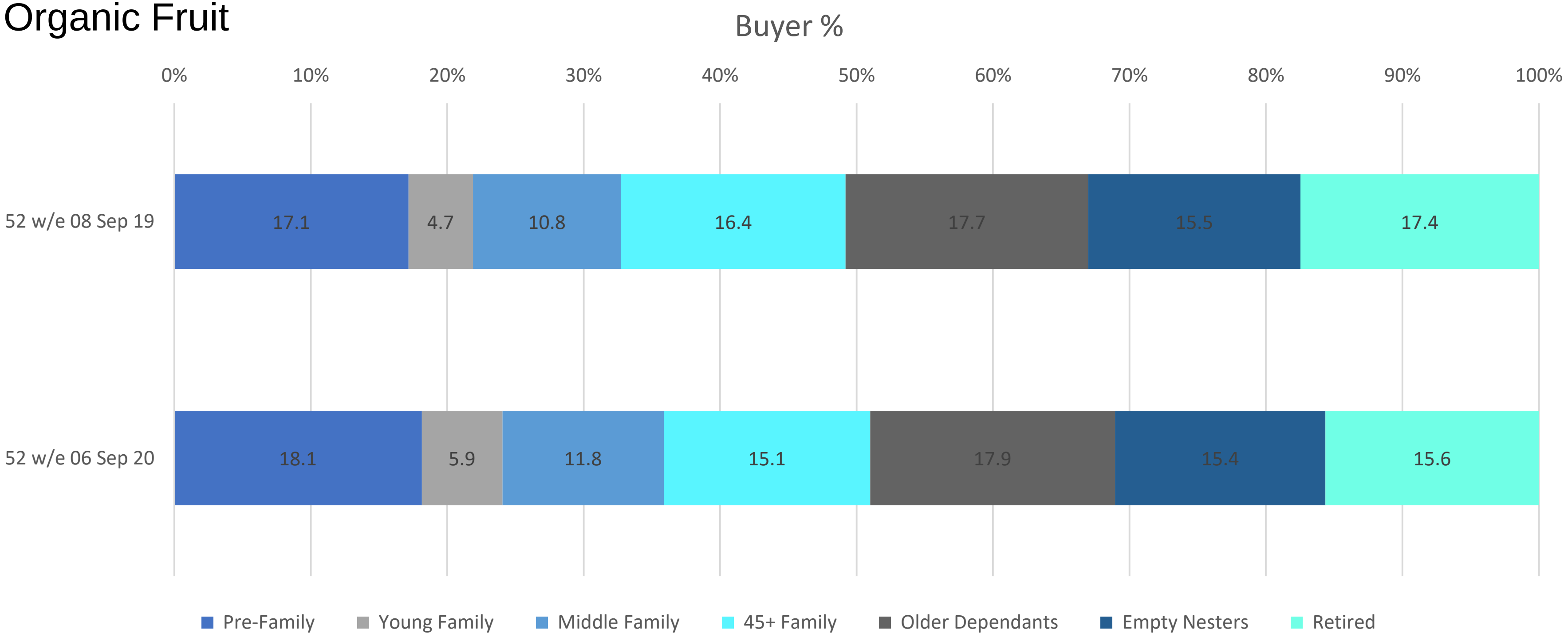


Retailer	Value +/-% Change YOY	Volume +/-% Change YOY
Tesco	-3%	-12%
Supervalu	18%	25%
Dunnes	76%	25%
Aldi	42%	43%
Lidl	6%	5%
Total Other Multiples	-25%	18%
Total Symbols	7%	-10%
Other Outlets	58%	31%

Source: Kantar: 52 w/e 06 Sep 20 vs LY

The younger segments of pre-families, young families, and middle families increasing share in the category along with older dependents.

Organic Fruit



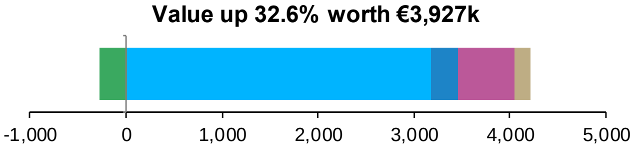
Source: Kantar

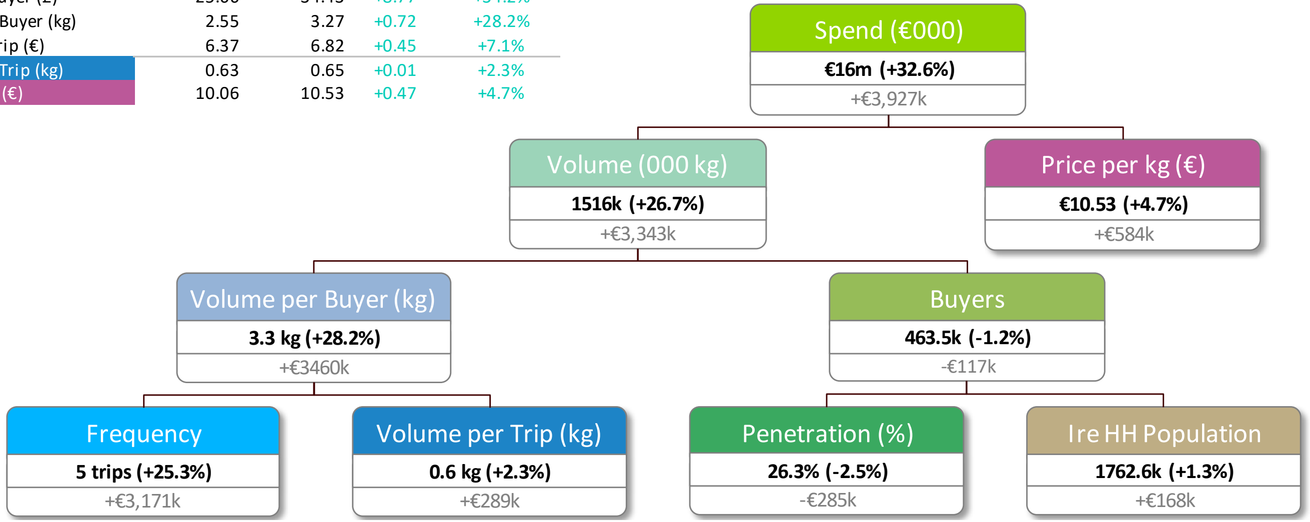
Organic Meat

- Organic Meat value at €15.9m is in strong growth +32.6% year on year driven through frequency but the loss of shoppers is of concern.
- Organic Meat is over trading against Total Meat which sees year on year growth of 6.6% led by increase in volume per trip.
- Within the key Retailers Supervalu has the largest value share of Organic Meat at 25.5% and volumes share at 24% holding a quarter of the total Organic Meat market in Retailers but performance is flat YOY.
- Dunnes holds second place value share with 21.3% followed by Tesco at 16.8% and then the Discounters which both see strong double digit growth year on year.
- Young Family , Middle Family and Older Dependants driving share growth.

Organic Meat value at €15.9m is in strong growth,+32.6% year on year driving growth through frequency but the loss of shoppers is of concern.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	12,031	15,957	+3,927	+32.6%
Volume (000 kg)	1,196	1,516	+320	+26.7%
Penetration (%)	26.96	26.30	-0.66	-2.5%
Frequency	4.03	5.05	+1.02	+25.3%
Spend per Buyer (£)	25.66	34.43	+8.77	+34.2%
Volume per Buyer (kg)	2.55	3.27	+0.72	+28.2%
Spend per Trip (€)	6.37	6.82	+0.45	+7.1%
Volume per Trip (kg)	0.63	0.65	+0.01	+2.3%
Price per kg (€)	10.06	10.53	+0.47	+4.7%



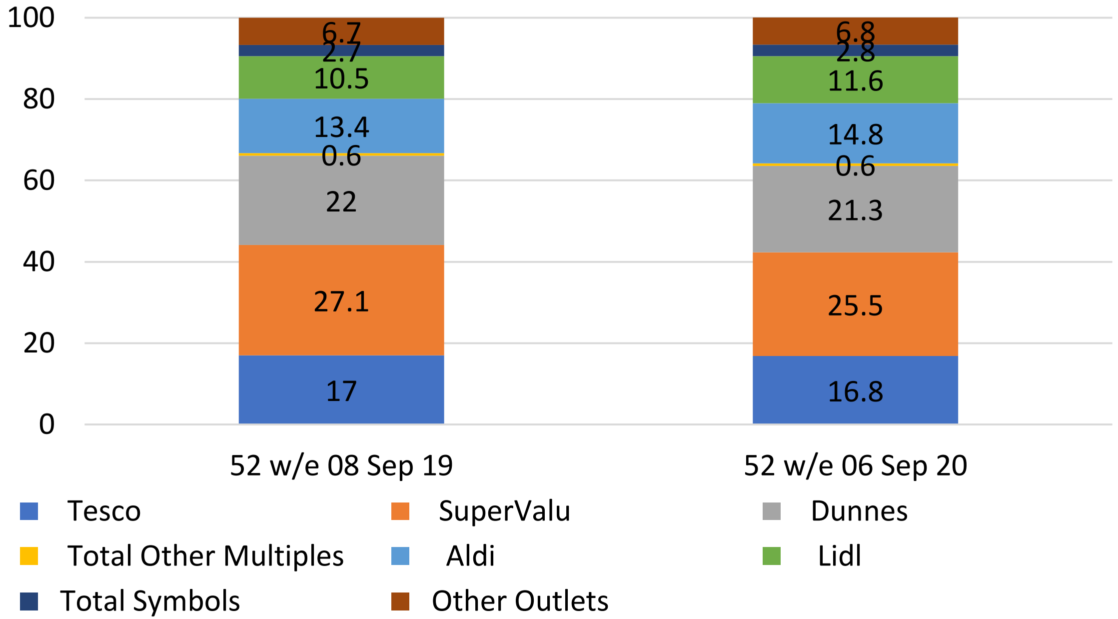


Retailer Activity – Supervalu has the largest value share of Organic Meat 25.5% but performance is flat YOY.

Dunnes holds 2nd place with share of 21.3% and has continued to grow value by 3.3% and volume by 1.3%

Discounters increased their share and that is reflected in double digit growth in value and volume.

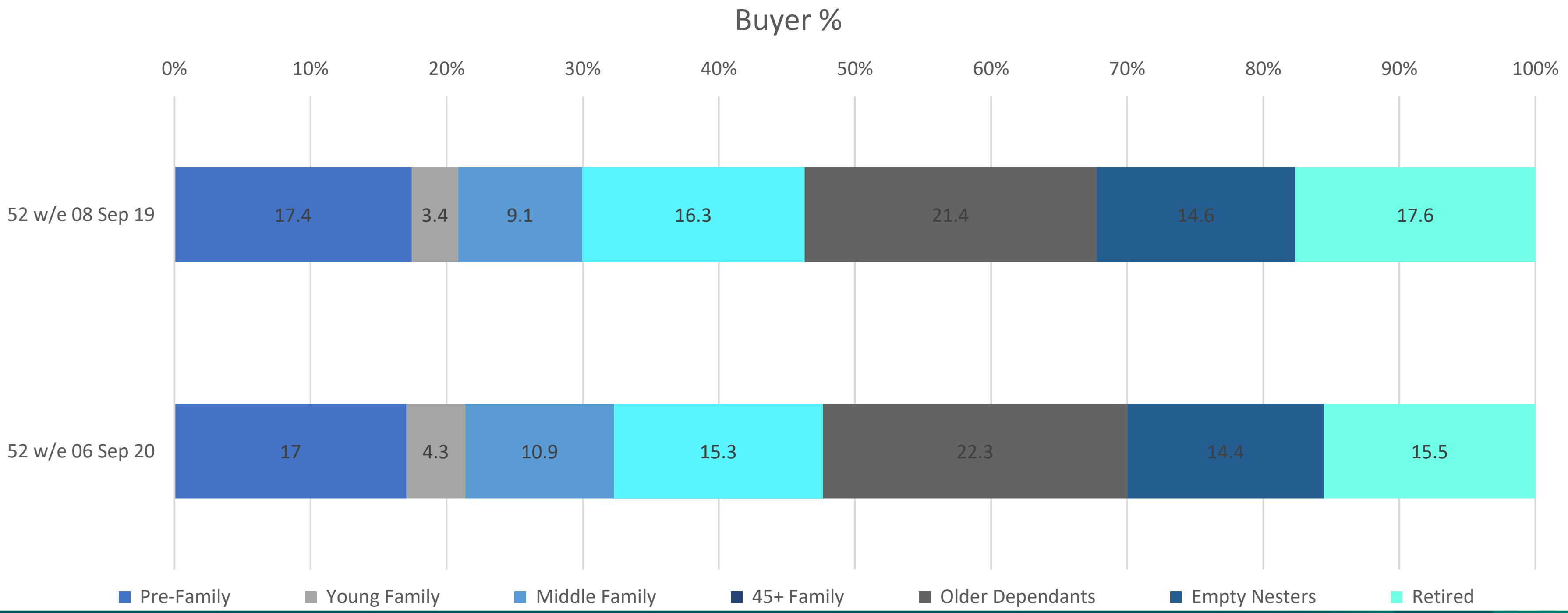
Tesco value share is slightly down but yoy showing growth in sales value 5.5% and volume of 3.5%



Retailer	Sales Value +/-% YOY	Volume +/-% YOY
Tesco	5.5%	3.5%
Supervalu	0.1%	-0.4%
Dunnes	3.3%	1.3%
Aldi	17.5%	17.6%
Lidl	17.1%	20.2%
Total Other Multiples	4.0%	3.3%
Total Symbols	9.4%	3.9%
Other Outlets	8.0%	8.0%

Young Family , Middle Family and Older Dependants driving share growth.

Organic Meat



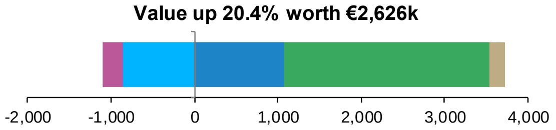
Organic Poultry

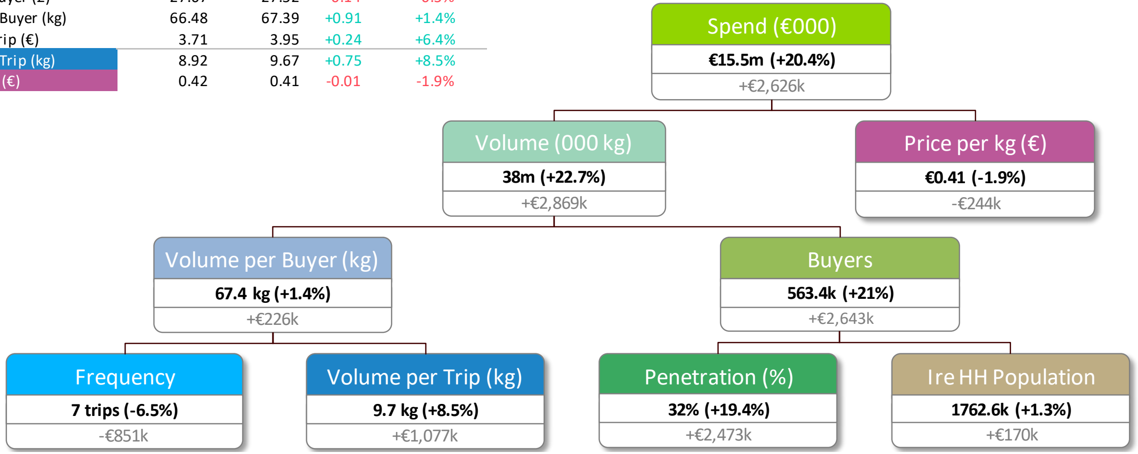
- Organic Poultry (Inc. Eggs) value at €15.5m has seen a +20.2% increase year on year driven by a strong increase in new shoppers into the category.
    - Eggs valued at €12.1m is driving strong growth of just over 30% driven primarily by new shoppers entering the market. Overtrading against the Total Eggs market which is valued at €1,239b and growing at 10.2%.
    - Organic Fresh Poultry (ex. Eggs) valued at €3.4m is in decline by -5.9% having seen a large frequency decline which has driven value loss, although still attracting some new shoppers.
- Total Poultry which is valued at +€1.6b and has had growth of 10.2% is under trading against organic growth of 20.2% year on year.
- Lidl holds largest value share in category and sees strong growth yoy. Lidl holds No. 1 spot in volume at 22.4% but is in decline with Dunnes and Supervalu gaining volume share in category.
- Supervalu sees strong value market share gain and transfers into both value and volume sales gain. Dunnes although slight decline in share value actually sees double digit value and volume sales year on year.
- Younger segments Pre-Family, Young Family and Middle family all increasing their share within Organic but biggest % increase has been within Older Dependants.

Organic Poultry (Inc. Eggs) value at €15.5m has seen a +20.4% increase year on year driven by a strong increase in new shoppers into the category.

Organic Poultry Total

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	12,880	15,506	+2,626	+20.4%
Volume (000 kg)	30,949	37,968	+7,019	+22.7%
Penetration (%)	26.77	31.96	+5.20	+19.4%
Frequency	7.45	6.97	-0.49	-6.5%
Spend per Buyer (£)	27.67	27.52	-0.14	-0.5%
Volume per Buyer (kg)	66.48	67.39	+0.91	+1.4%
Spend per Trip (€)	3.71	3.95	+0.24	+6.4%
Volume per Trip (kg)	8.92	9.67	+0.75	+8.5%
Price per kg (€)	0.42	0.41	-0.01	-1.9%



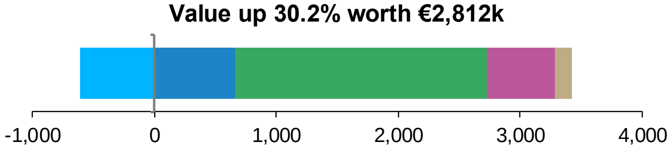


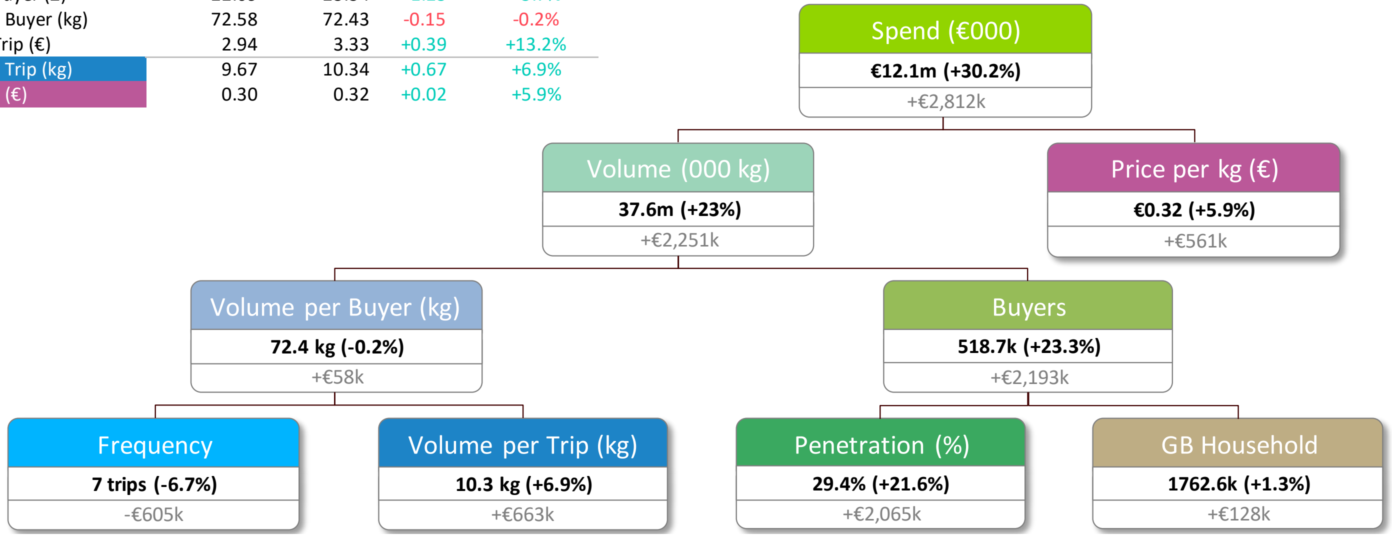
Source: Kantar: 52 w/e 06 Sep 20 vs LY

Eggs valued at €12.1m is driving strong growth of just over 30% driven primarily by new shoppers entering the market.

Organic Eggs

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	9,297	12,109	+2,812	+30.2%
Volume (000 kg)	30,542	37,572	+7,030	+23.0%
Penetration (%)	24.19	29.43	+5.24	+21.6%
Frequency	7.51	7.00	-0.50	-6.7%
Spend per Buyer (£)	22.09	23.34	+1.25	+5.7%
Volume per Buyer (kg)	72.58	72.43	-0.15	-0.2%
Spend per Trip (€)	2.94	3.33	+0.39	+13.2%
Volume per Trip (kg)	9.67	10.34	+0.67	+6.9%
Price per kg (€)	0.30	0.32	+0.02	+5.9%

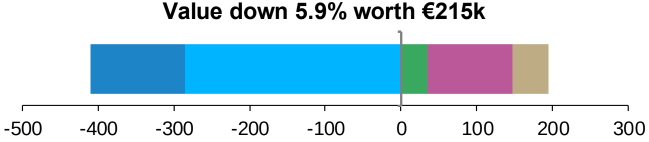


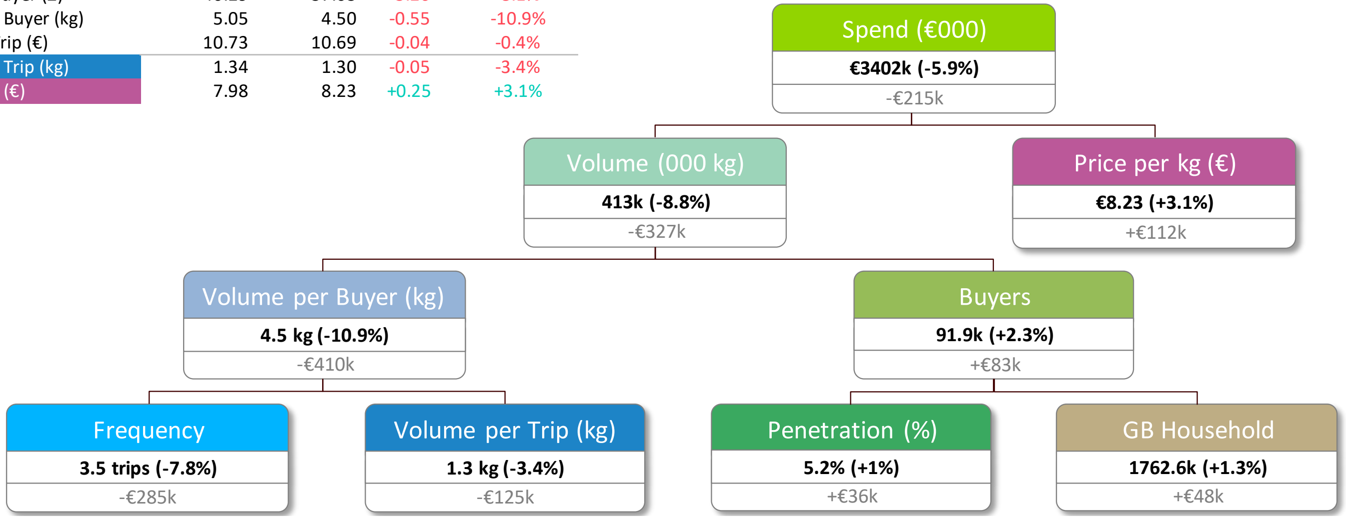


Organic Fresh Poultry (ex. Eggs) valued at €3.4m is in decline by -5.9% having seen a large frequency decline which has driven value loss, although still attracting some new shoppers.

Organic Fresh Poultry

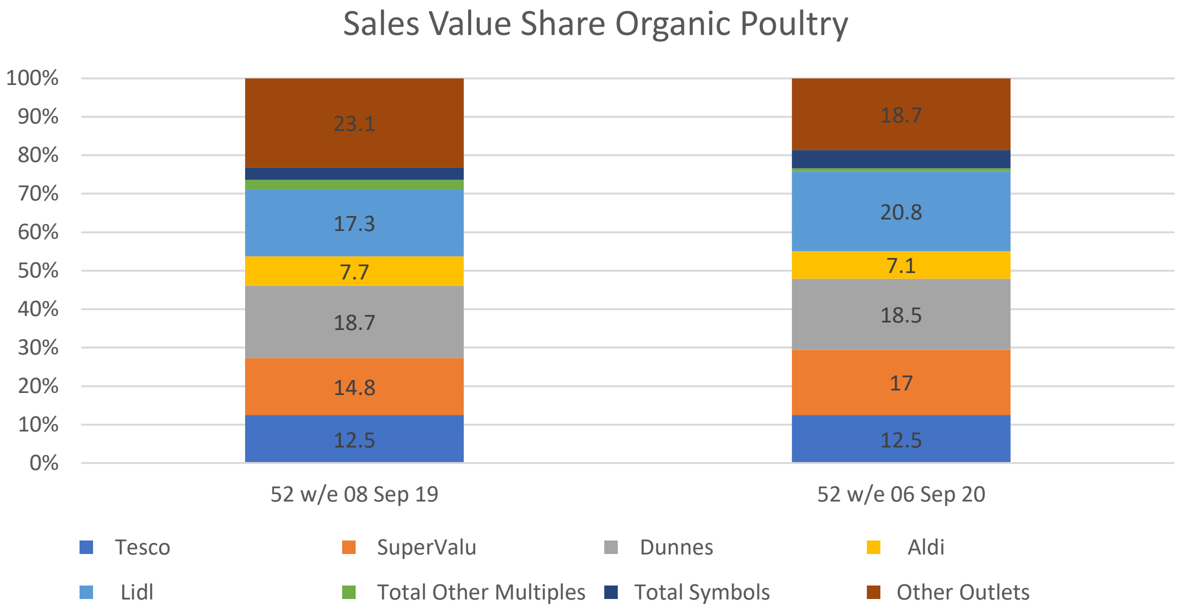
Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	3,617	3,402	-215	-5.9%
Volume (000 kg)	453	413	-40	-8.8%
Penetration (%)	5.16	5.21	+0.05	+1.0%
Frequency	3.76	3.46	-0.29	-7.8%
Spend per Buyer (£)	40.29	37.03	-3.26	-8.1%
Volume per Buyer (kg)	5.05	4.50	-0.55	-10.9%
Spend per Trip (€)	10.73	10.69	-0.04	-0.4%
Volume per Trip (kg)	1.34	1.30	-0.05	-3.4%
Price per kg (€)	7.98	8.23	+0.25	+3.1%





Top 3: Lidl holds largest share in category and sees strong growth yoy.

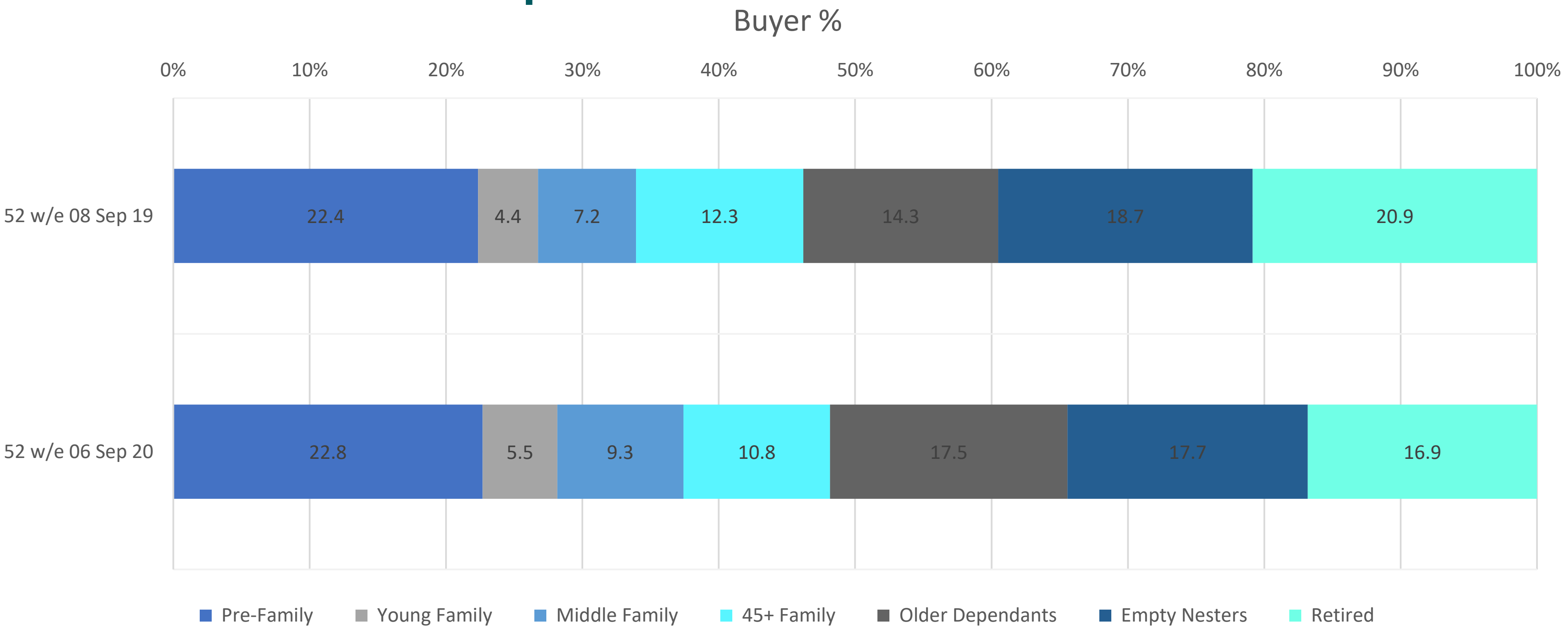
Supervalu sees strong market share gain and transfers into both value and volume sales gain. Dunnes although slight decline in share value actually sees double digit value and volume sales year on year.



Retailer	Value +/-% ChangeYOY	Volume +/-% Change YOY
Tesco	20%	14%
Supervalu	38%	39%
Dunnes	19%	28%
Aldi	10%	10%
Lidl	45%	18%
Total Other Multiples	-63%	-32%
Total Symbols	73%	94%
Other Outlets	-3%	10%

Source: Kantar: 52 w/e 06 Sep 20 vs LY

Younger segments Pre-Family, Young Family and Middle family all increasing their share within Organic but biggest % increase has been within Older Dependants.



Organic Fish

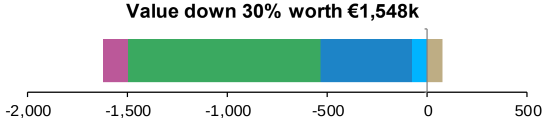
- Organic fish value €3.6m has seen a strong value decline of -30% as the ranges decrease and shoppers move out of the category.

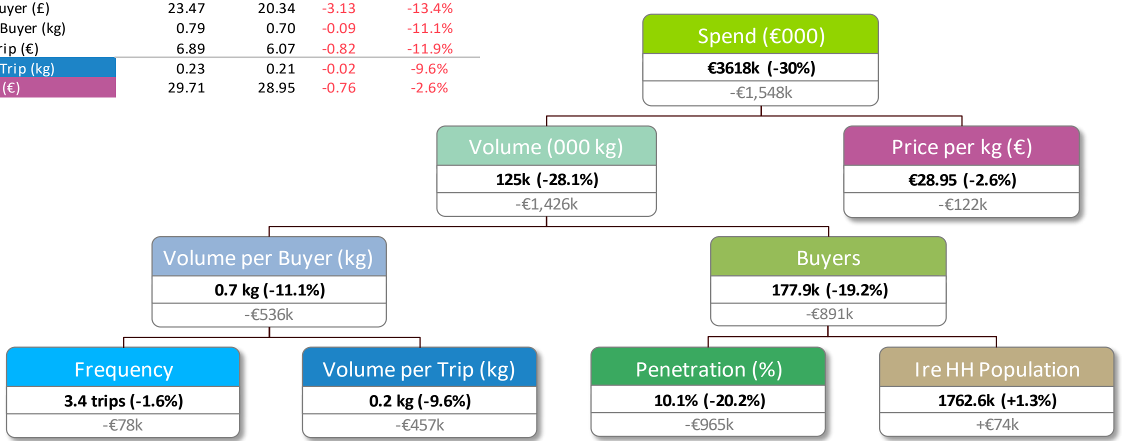
- Total Fish is valued at €175m and is down -2.3% year on year driven by shoppers leaving the category and a major decrease in shopper frequency.

- Covid 19 has had a major impact on shoppers changing attitudes to purchasing loose product and the closure of Loose Fresh Fish Counter space in retail has impacted on Fish sales.
- Dunnes holding 30.2% of Total Organic Fish but has lost share to Tesco, Lidl and Aldi. However all Retailers have lost value and volume this year.
- Supervalu holds 33.7% share of the Loose Fish category but there have been strong declines.
- +45Family and Pre-Family driving share but bulk of consumers coming from Older dependents.

Organic fish value €3.6m has seen a strong value decline of 30% as the ranges decrease and shoppers move out of the category.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	5,166	3,618	-1,548	-30.0%
Volume (000 kg)	174	125	-49	-28.1%
Penetration (%)	12.66	10.09	-2.56	-20.2%
Frequency	3.41	3.35	-0.06	-1.6%
Spend per Buyer (£)	23.47	20.34	-3.13	-13.4%
Volume per Buyer (kg)	0.79	0.70	-0.09	-11.1%
Spend per Trip (€)	6.89	6.07	-0.82	-11.9%
Volume per Trip (kg)	0.23	0.21	-0.02	-9.6%
Price per kg (€)	29.71	28.95	-0.76	-2.6%

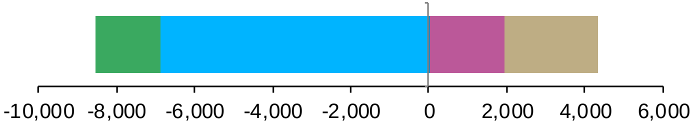


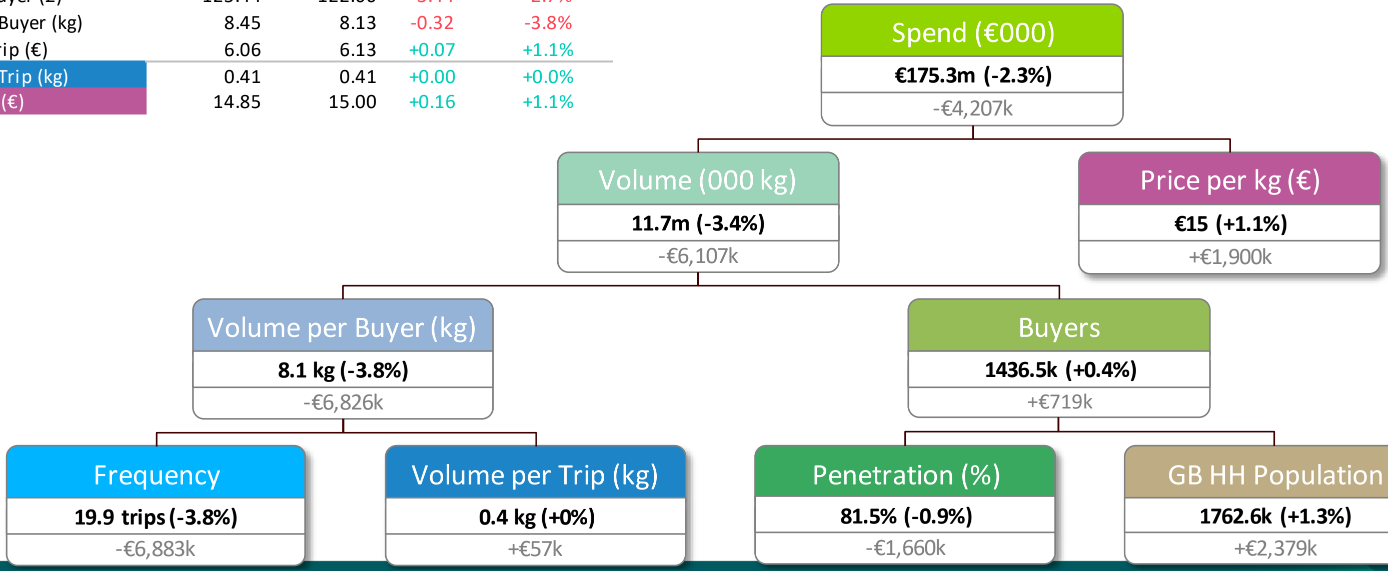


Total Fish is valued at €175m and is down -2.3% year on year driven by shoppers leaving the category and a major decrease in shopper frequency.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	179,462	175,255	-4,207	-2.3%
Volume (000 kg)	12,089	11,680	-408	-3.4%
Penetration (%)	82.25	81.50	-0.75	-0.9%
Frequency	20.70	19.91	-0.79	-3.8%
Spend per Buyer (£)	125.44	122.00	-3.44	-2.7%
Volume per Buyer (kg)	8.45	8.13	-0.32	-3.8%
Spend per Trip (€)	6.06	6.13	+0.07	+1.1%
Volume per Trip (kg)	0.41	0.41	+0.00	+0.0%
Price per kg (€)	14.85	15.00	+0.16	+1.1%

Value down 2.3% worth €4,207k

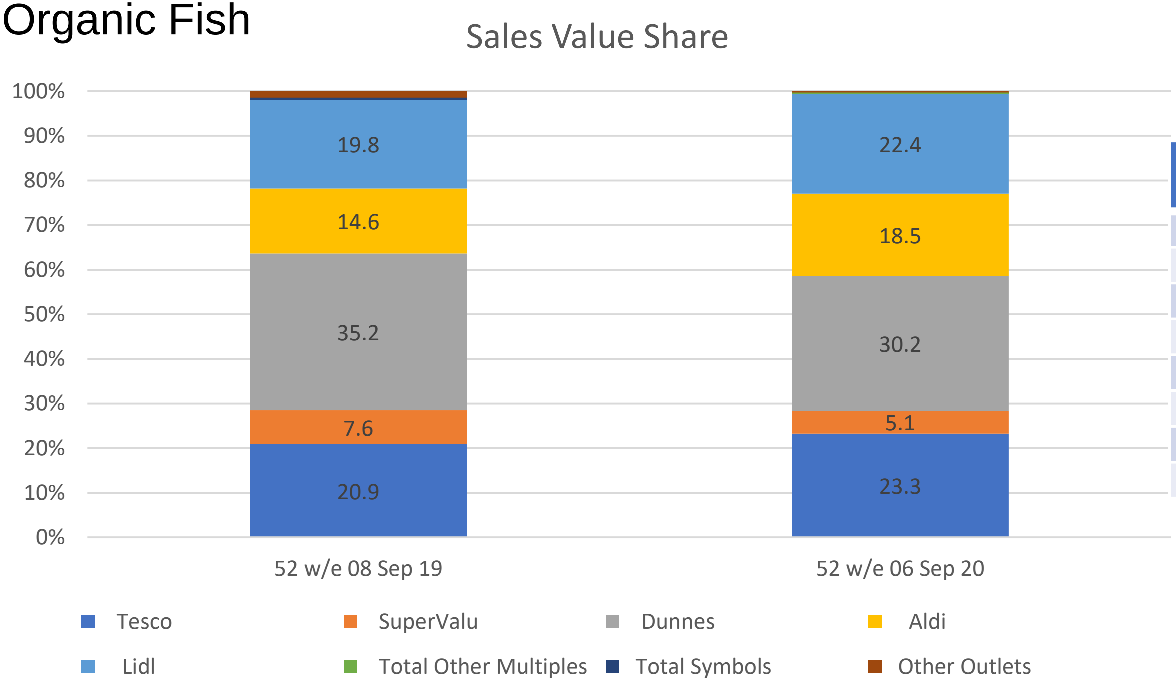




Source: Kantar: 52 w/e 06 Sep 20 vs LY Total Fish

Within Total Organic Fish, Dunnes holding 30.2% has lost share to Tesco, Lidl and Aldi. However all Retailers have lost value and volume this year with the closure of fresh counters.

Organic Fish

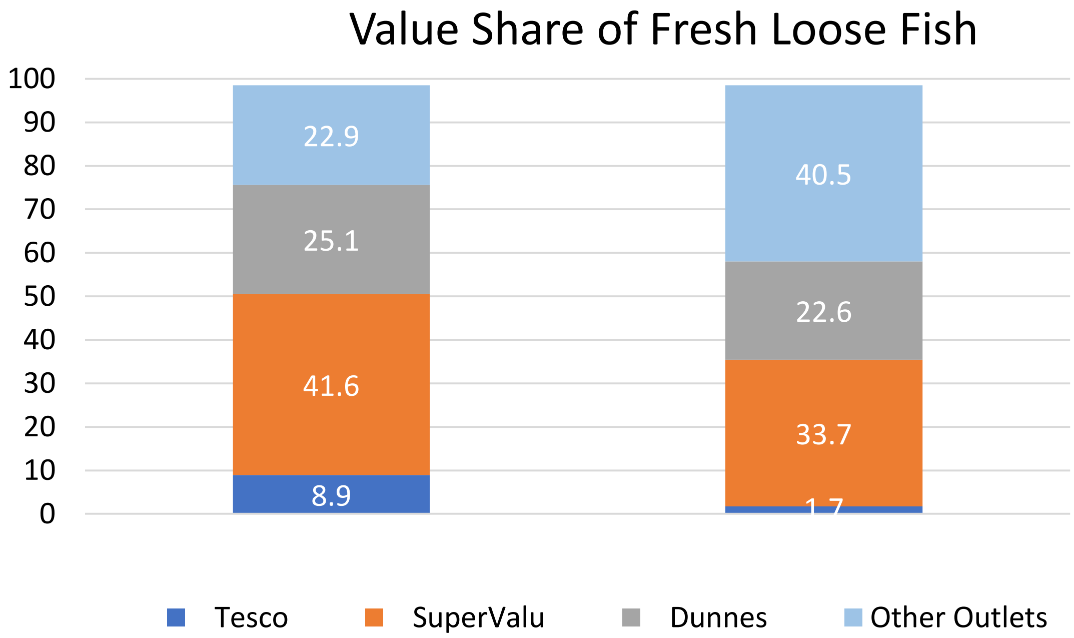


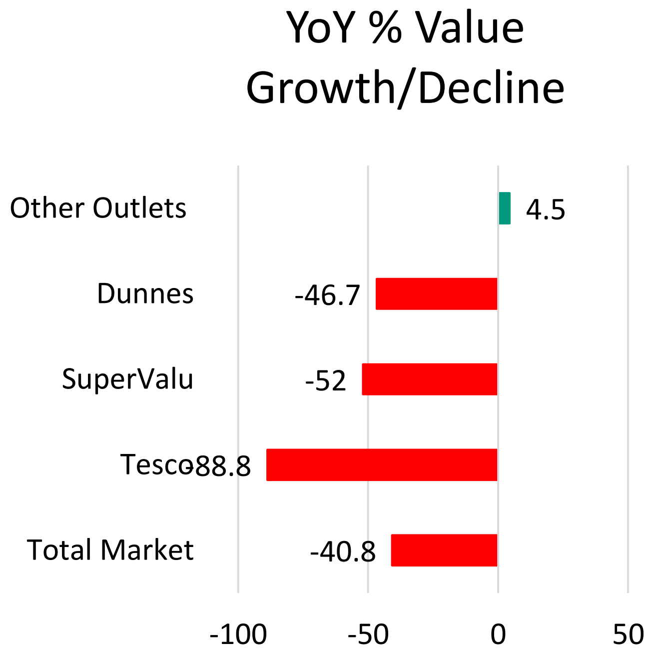
	% Value Change YOY	% Volume Change YOY
Tesco	-22%	-24%
SuperValu	-54%	-34%
Dunnes	-40%	-42%
Aldi	-11%	-16%
Lidl	-21%	-19%
Total Other Multiples		
Total Symbols	-100%	-100%
Other Outlets	-84%	-73%

Source: Kantar: 52 w/e 06 Sep 20 vs LY Organic Fish

Supervalu holds 33.7% share of the Loose Fish category but there have been strong declines.

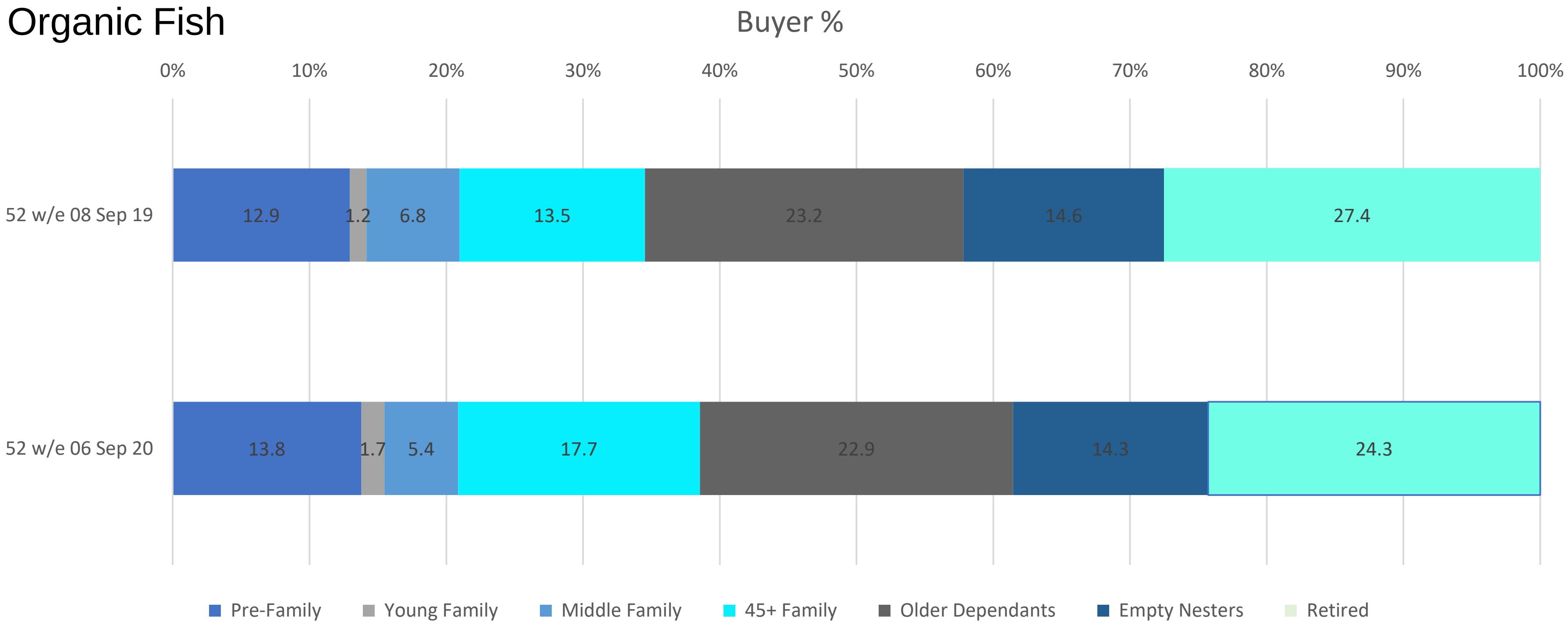
Organic Range decreases, fish counters closed, shoppers attitudes towards purchasing loose fish due to Covid 19 also likely contributed to its market decline.





45+ Family and Pre-Family driving share but the key demographics purchasing Fish are Older dependents and Retired.

Organic Fish



Organic Ambient

- Organic Ambient value €29.8m has seen strong growth of 22.2% as new shoppers enter the category and with increased frequency and volume purchase.

- Organic Ambient growing ahead of Total Ambient Groceries valued at €3.513b which is in growth by 12.8% year on year driven by an increase in volume per trip.

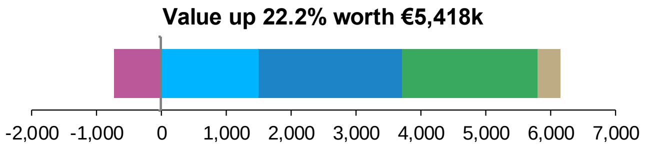
- Supervalu dominate with 32.2% share followed by Tesco 18.4% and Lidl at 8.9% share who have both increased their share of category.

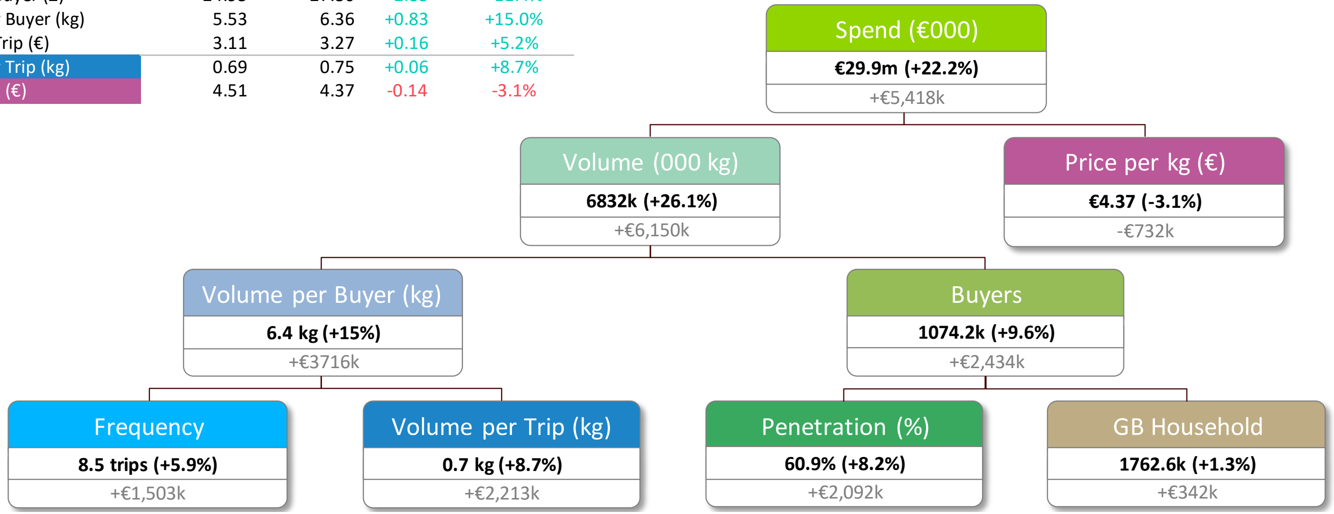
- The older shoppers have become more key to Organic Ambient, Retired moving up to 18.5% of all buyers but Pre-Family buyers remains the largest cohort.

Source: Kantar

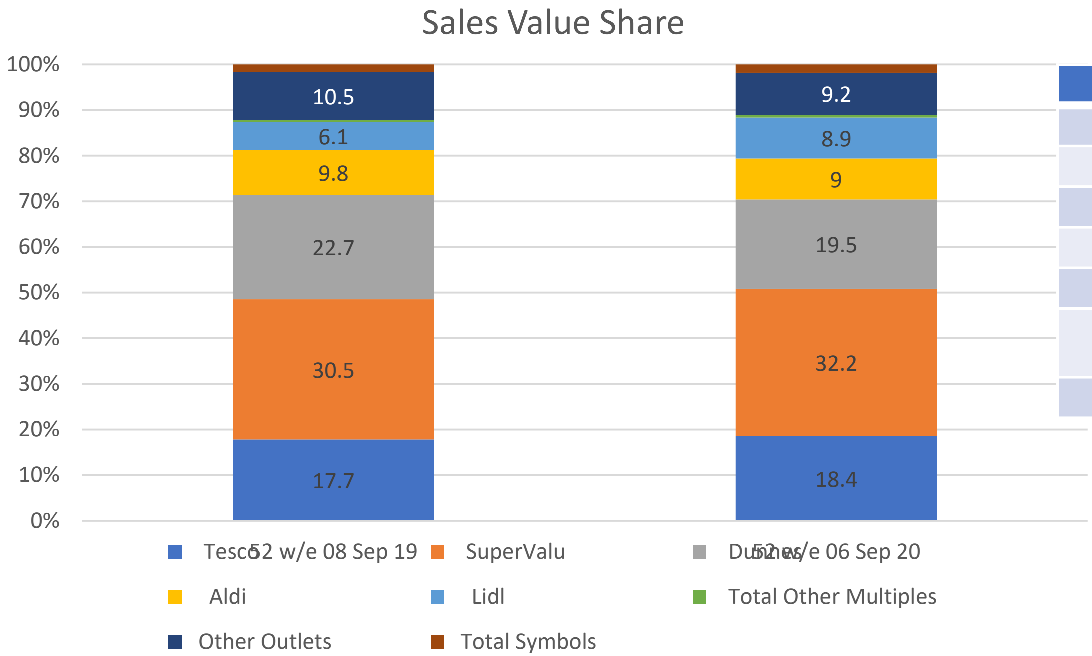
Organic Ambient category value of €29.8m has seen strong growth of 22.2%driven by new shoppers, increased frequency and volume in shop.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	24,441	29,859	+5,418	+22.2%
Volume (000 kg)	5,417	6,832	+1,415	+26.1%
Penetration (%)	56.33	60.94	+4.61	+8.2%
Frequency	8.03	8.50	+0.47	+5.9%
Spend per Buyer (£)	24.95	27.80	+2.85	+11.4%
Volume per Buyer (kg)	5.53	6.36	+0.83	+15.0%
Spend per Trip (€)	3.11	3.27	+0.16	+5.2%
Volume per Trip (kg)	0.69	0.75	+0.06	+8.7%
Price per kg (€)	4.51	4.37	-0.14	-3.1%





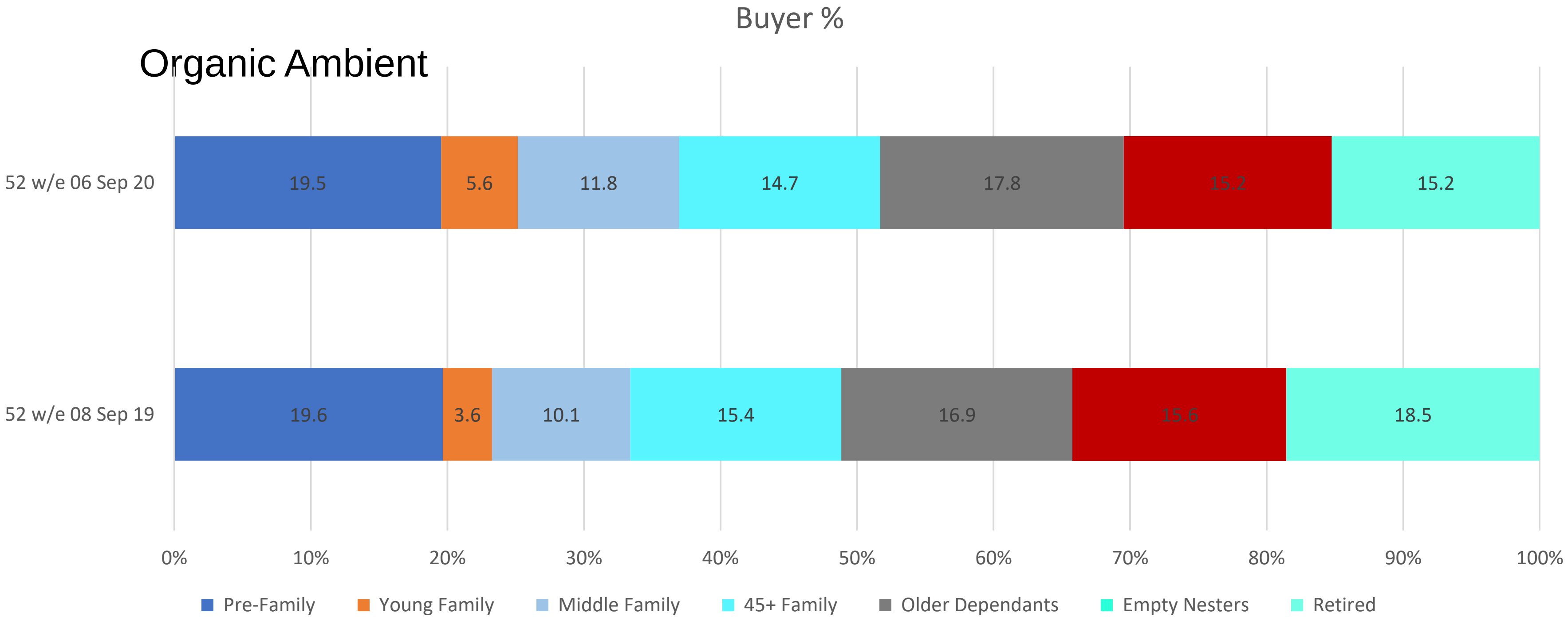
Supervalu growing its dominance in the category with 32.2% share. Tesco and Lidl also increasing their share and driving double digit value growth year on year.



	YoY Change	YoY Change
Tesco	26.9%	18.8%
SuperValu	29.0%	53.8%
Dunnes	5%	9%
Aldi	12.1%	1.6%
Lidl	77.7%	83.7%
Total Other Multiples	96.3%	71.7%
Total Symbols	37.8%	40.6%

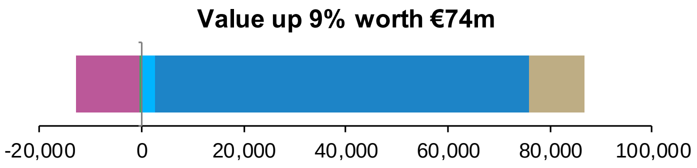
Source: Kantar: 52 w/e 06 Sep 20 vs LY

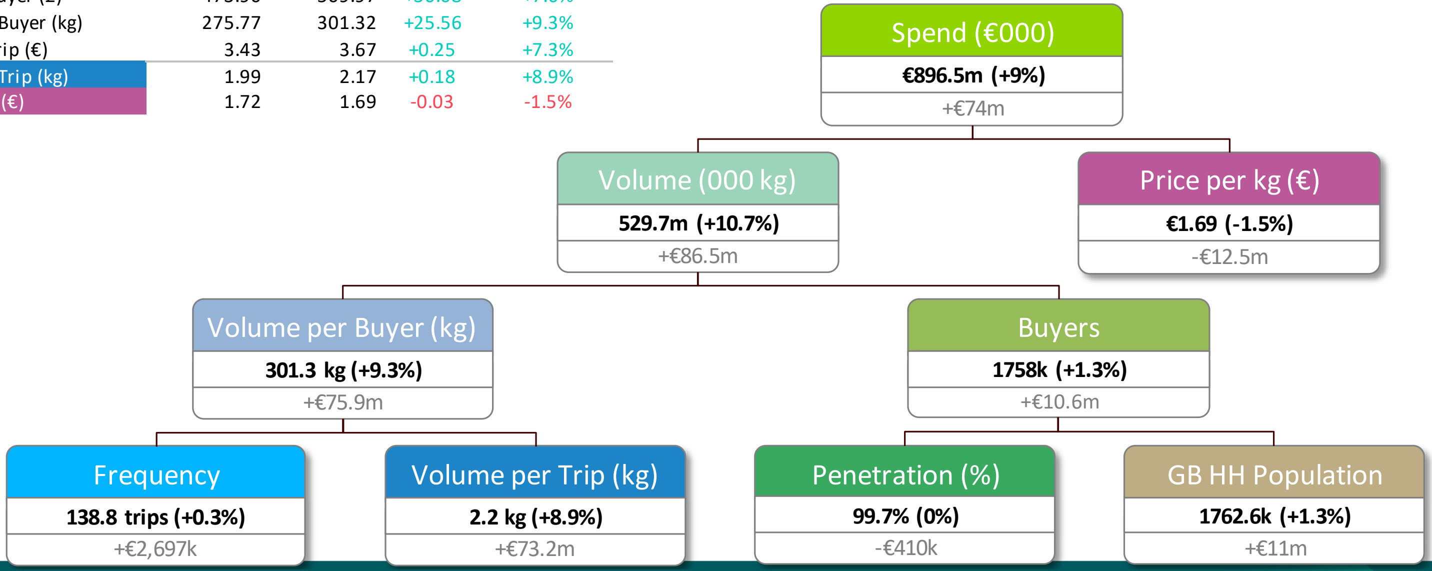
The older shoppers have become more key to Organic Ambient, Retired moving up to 18.5% of all buyers but Pre-Family buyers remains the largest cohort.



Total Vegetables valued at €896m an increase of 9% year on year. Category driven by increase in volume per trip.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	822,518	896,532	+74,014	+9.0%
Volume (000 kg)	478,633	529,723	+51,090	+10.7%
Penetration (%)	99.79	99.74	-0.05	-0.0%
Frequency	138.34	138.80	+0.45	+0.3%
Spend per Buyer (£)	473.90	509.97	+36.08	+7.6%
Volume per Buyer (kg)	275.77	301.32	+25.56	+9.3%
Spend per Trip (€)	3.43	3.67	+0.25	+7.3%
Volume per Trip (kg)	1.99	2.17	+0.18	+8.9%
Price per kg (€)	1.72	1.69	-0.03	-1.5%

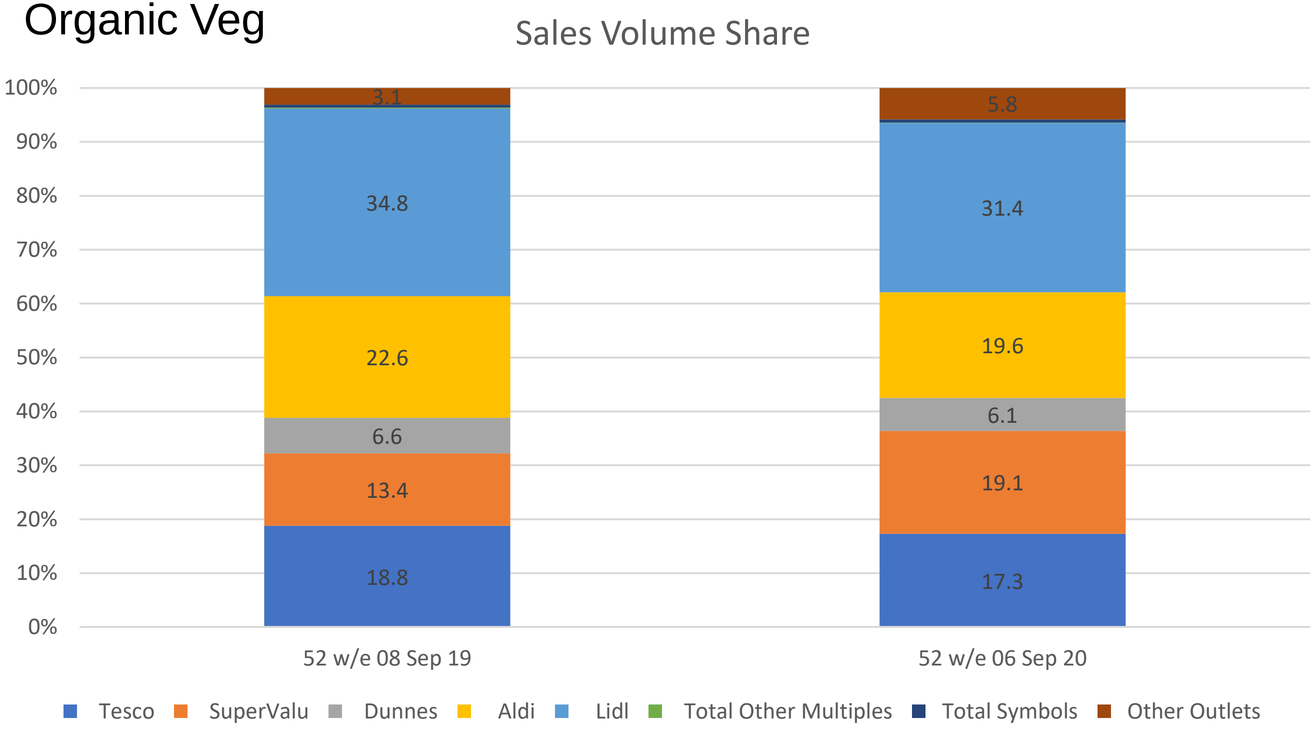




Source: Kantar: 52 w/e 06 Sep 20 vs LY

Organic Vegetables Lidl holds no1 position in volume terms but has lost share and volume year on year.

Organic Veg



	YoY Change
Tesco	-2%
SuperValu	50%
Dunnes	-2%
Aldi	-8%
Lidl	-5%
Total Other Multiples	-19%
Total Symbols	41%
Other Outlets	99%

Source: Kantar volume 52 wks w/e 6 Sept 2020

Organic Veg - SKUS

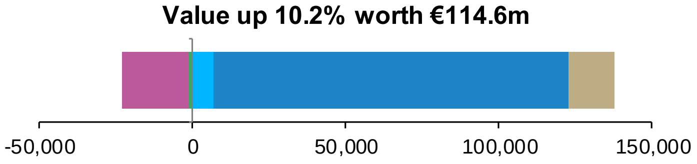
Branded	SKUS
Simply Organic	1
Country Harvest	2

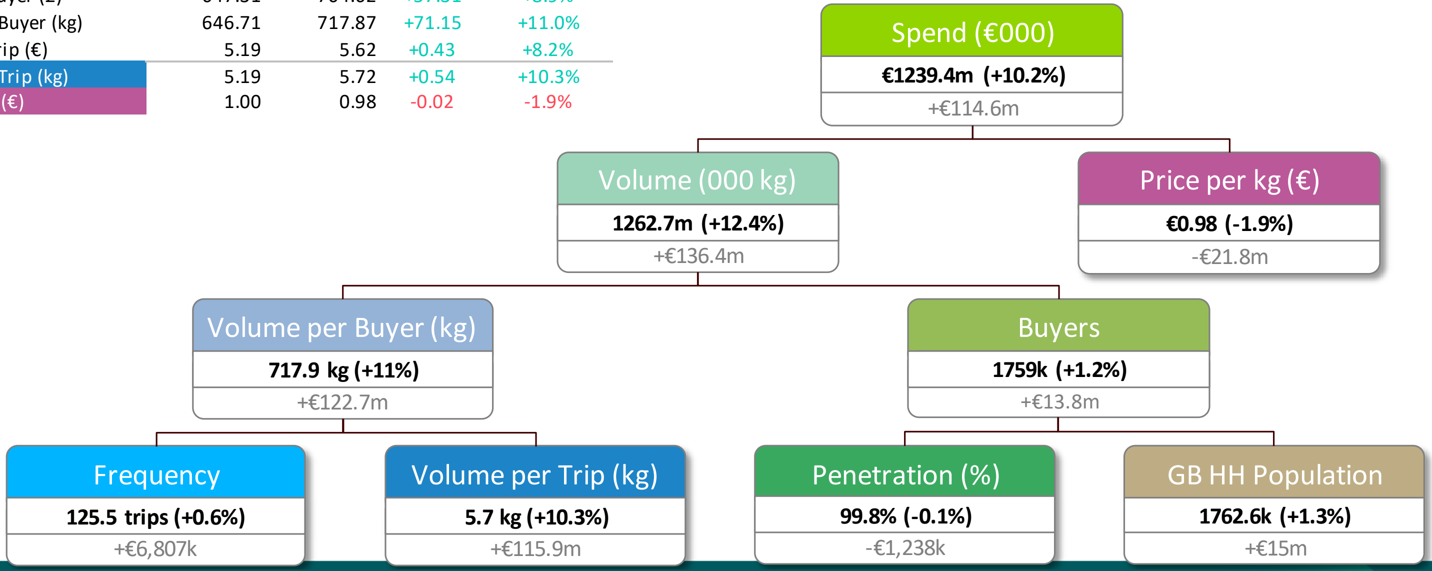
PL	SKUS
Aldi	18
Dunnes	45
Lidl	16
Supervalu	32
Tesco	45

Source: Kantar

Total Dairy valued at €1.2b and in growth by 10.2% year on year driven by increase in volume per trip.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	1,124,826	1,239,431	+114,605	+10.2%
Volume (000 kg)	1,123,791	1,262,736	+138,945	+12.4%
Penetration (%)	99.91	99.80	-0.11	-0.1%
Frequency	124.71	125.47	+0.76	+0.6%
Spend per Buyer (£)	647.31	704.62	+57.31	+8.9%
Volume per Buyer (kg)	646.71	717.87	+71.15	+11.0%
Spend per Trip (€)	5.19	5.62	+0.43	+8.2%
Volume per Trip (kg)	5.19	5.72	+0.54	+10.3%
Price per kg (€)	1.00	0.98	-0.02	-1.9%

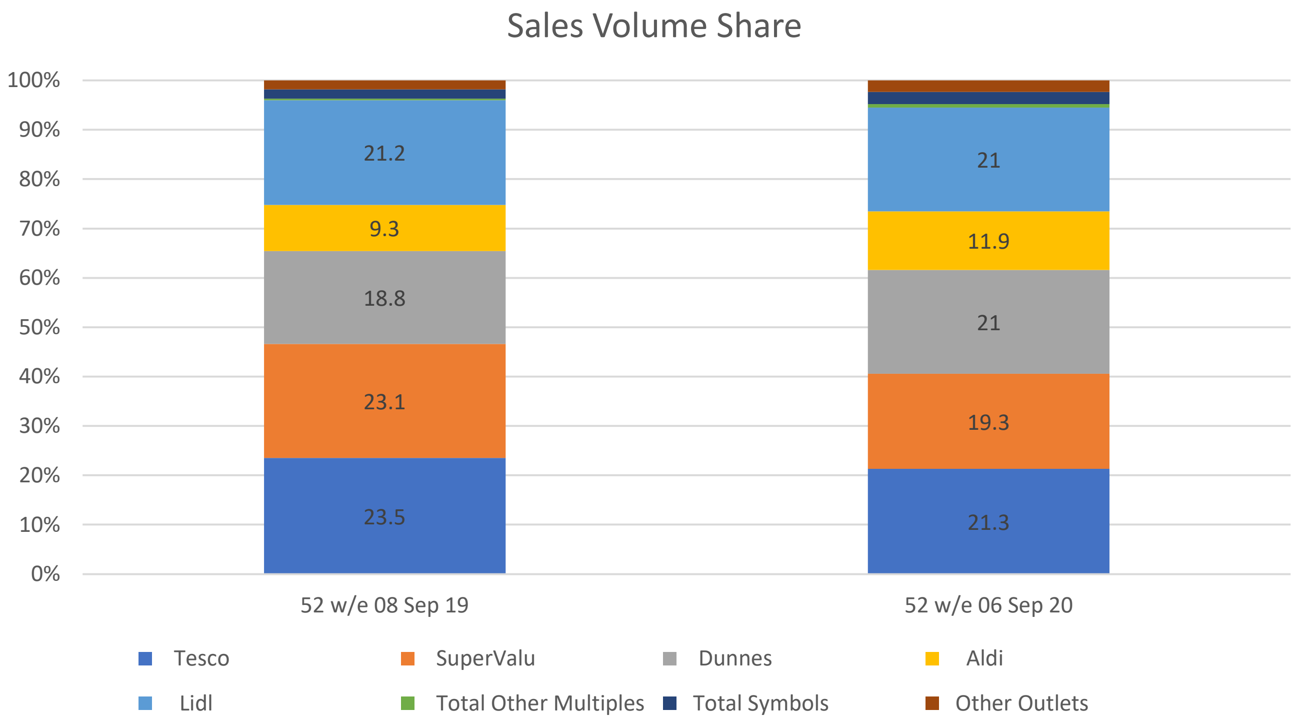




Source: Kantar: 52 w/e 06 Sep 20 vs LY

Tesco holds no. 1 volume share but its share has been eroded by growth in Dunnes Stores and Aldi. SuperValu seeing a decline.

Organic Dairy



	YoY Change
Tesco	0%
SuperValu	-8%
Dunnes	23%
Aldi	42%
Lidl	9%
Total Other Multiples	146%
Total Symbols	41%
Other Outlets	43%

Organic Dairy - SKUS

Branded	SKUS
Glenisk	45
Rachels Organic	25
Yeo Valley	12
Provamel	10
Co Yo	7
Plenish	6
Rude Health	5
Alpro	4
Danone	4
Bunalun	3
Naturli	3
Bio-Tiful	2
Oatly	2
Sojade	2
Adams	1
Biona	1
Dale Farm	1
Feel Good	1
Lye Cross	1
Moss Field	1
Munch Bunch	1
Nourish	1

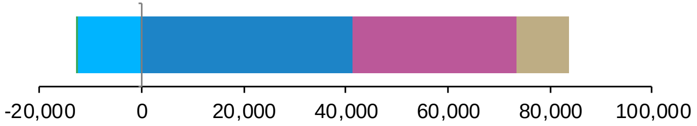
PL	SKUS
Aldi	6
Dunnes	1
Lidl	17
Supervalu	8
Tesco	8

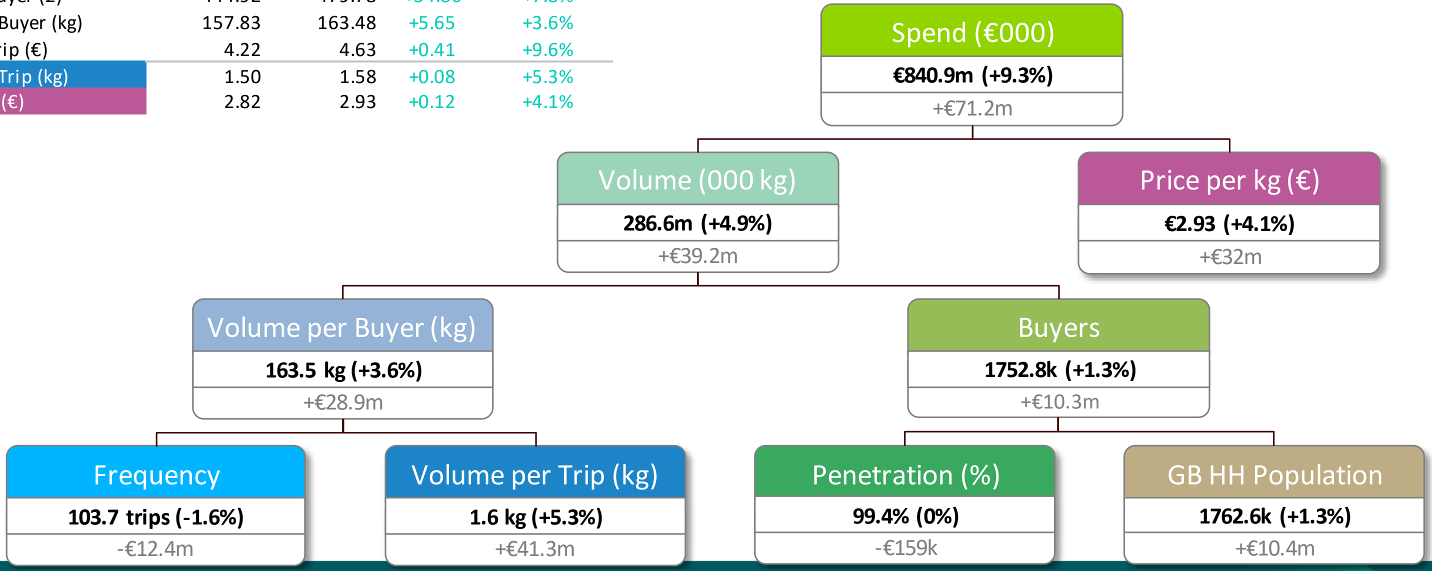
Source: Kantar

Total Fruit value €841m is up 9.3% year on year driven by volume per trip and average price increase.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	769,711	840,942	+71,231	+9.3%
Volume (000 kg)	273,045	286,551	+13,506	+4.9%
Penetration (%)	99.46	99.44	-0.02	-0.0%
Frequency	105.40	103.68	-1.72	-1.6%
Spend per Buyer (£)	444.92	479.78	+34.86	+7.8%
Volume per Buyer (kg)	157.83	163.48	+5.65	+3.6%
Spend per Trip (€)	4.22	4.63	+0.41	+9.6%
Volume per Trip (kg)	1.50	1.58	+0.08	+5.3%
Price per kg (€)	2.82	2.93	+0.12	+4.1%

Value up 9.3% worth €71.2m

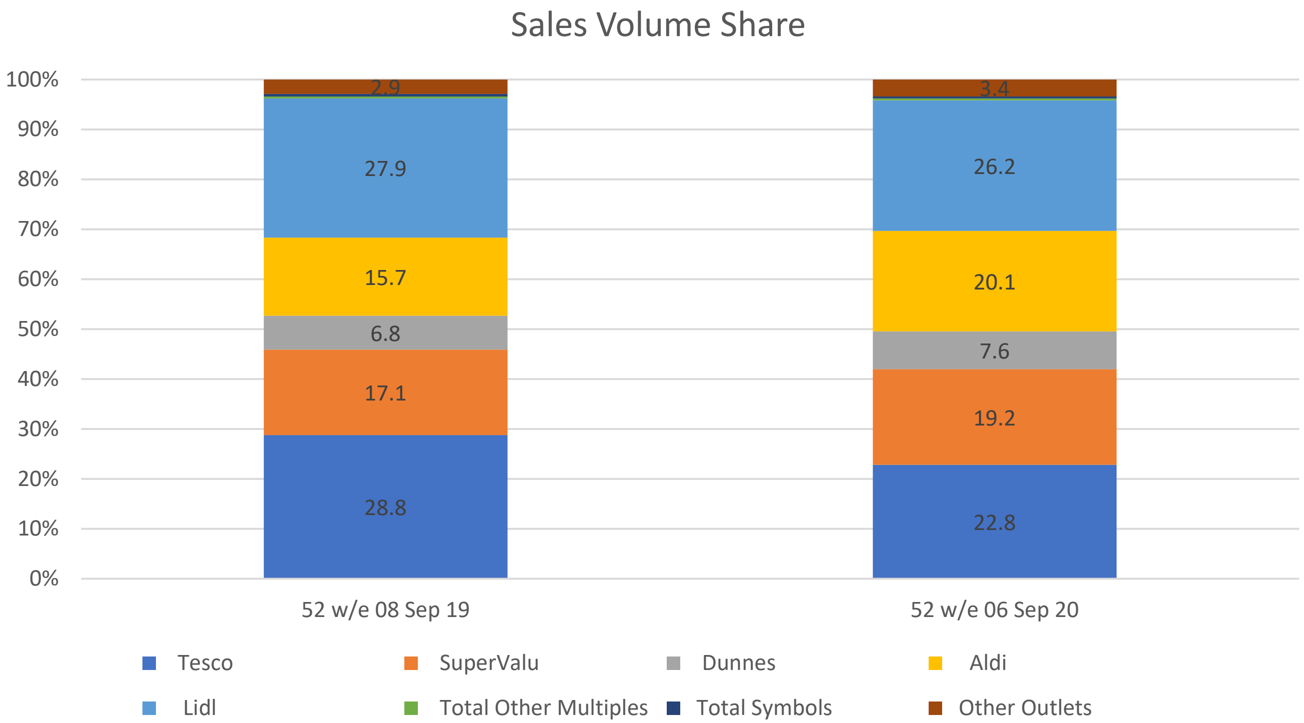




Source: Kantar: 52 w/e 06 Sep 20 vs LY

Lidl holds No. 1 spot in volume share with 26.2%. All retailers performing in volume terms with the exception of Tesco.

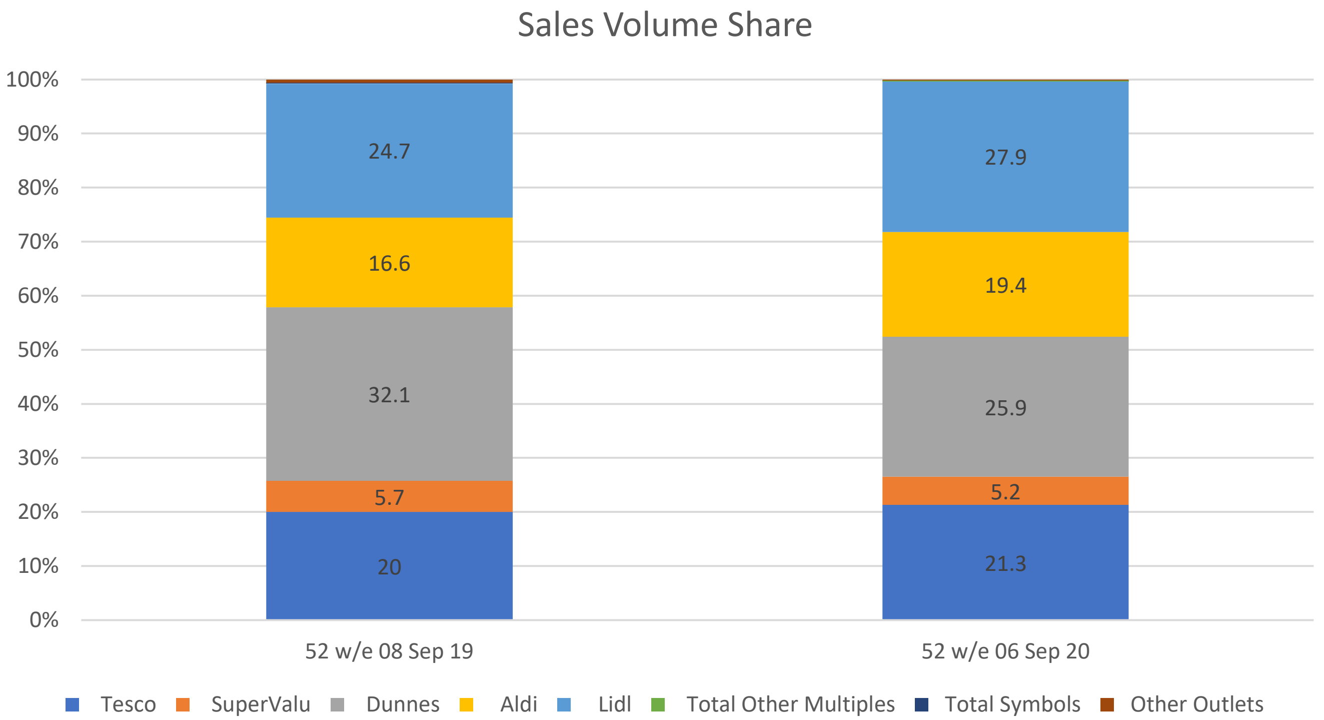
Organic Fruit



	YoY Change
Tesco	-12%
SuperValu	25%
Dunnes	25%
Aldi	43%
Lidl	5%
Total Other Multiples	18%
Total Symbols	-10%
Other Outlets	31%

Lidl is holds no. 1 share space with 27.9% an increase of 3.2% points in a year. But all Retailers are showing volume decline year on year.

Organic Fish



	YoY Change
Tesco	-24%
SuperValu	-34%
Dunnes	-42%
Aldi	-16%
Lidl	-19%
Total Other Multiples	
Total Symbols	-100%
Other Outlets	-73%

BORD BIA
IRISH FOOD BOARD

Source: Kantar volume 52 wks w/e 06/09/20 v LY

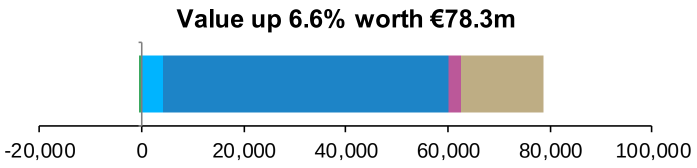
Organic Fruit - SKUS

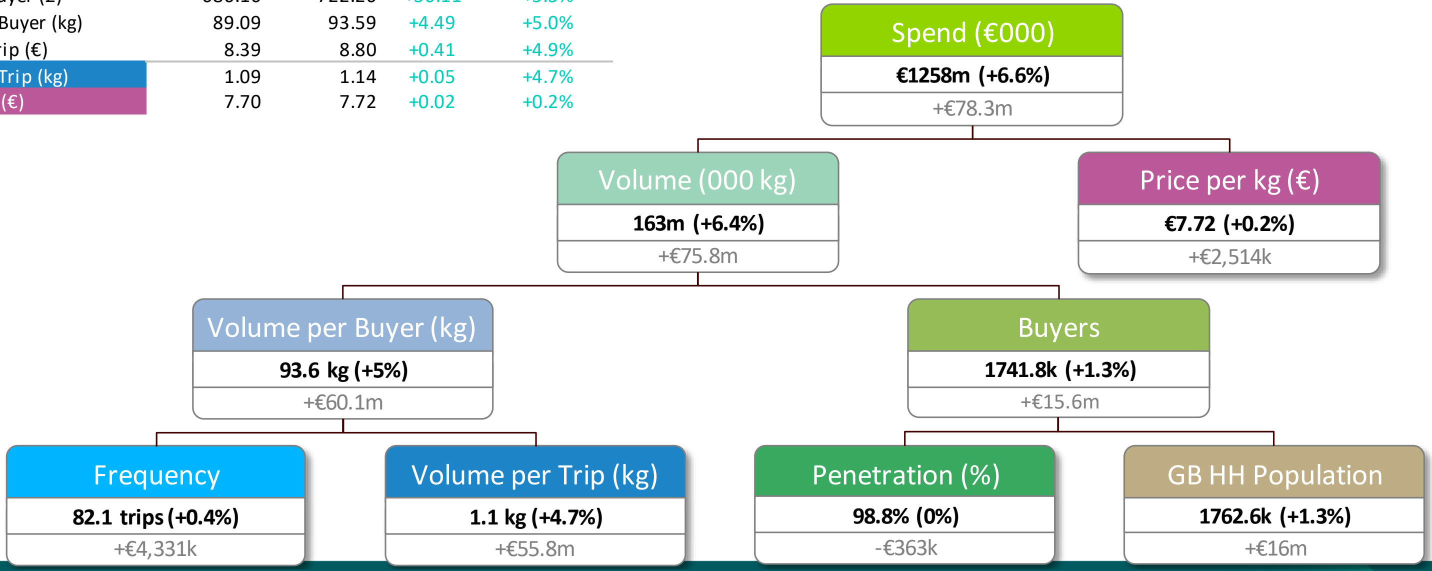
Branded	SKUS
Country Harvest	4
Fyffes	1

PL	SKUS
Aldi	9
Dunnes	15
Lidl	10
Supervalu	12
Tesco	26

Total Fresh Meat valued at +€1.258b and in growth by 6.6% delivered through an increase primarily in volume per trip.

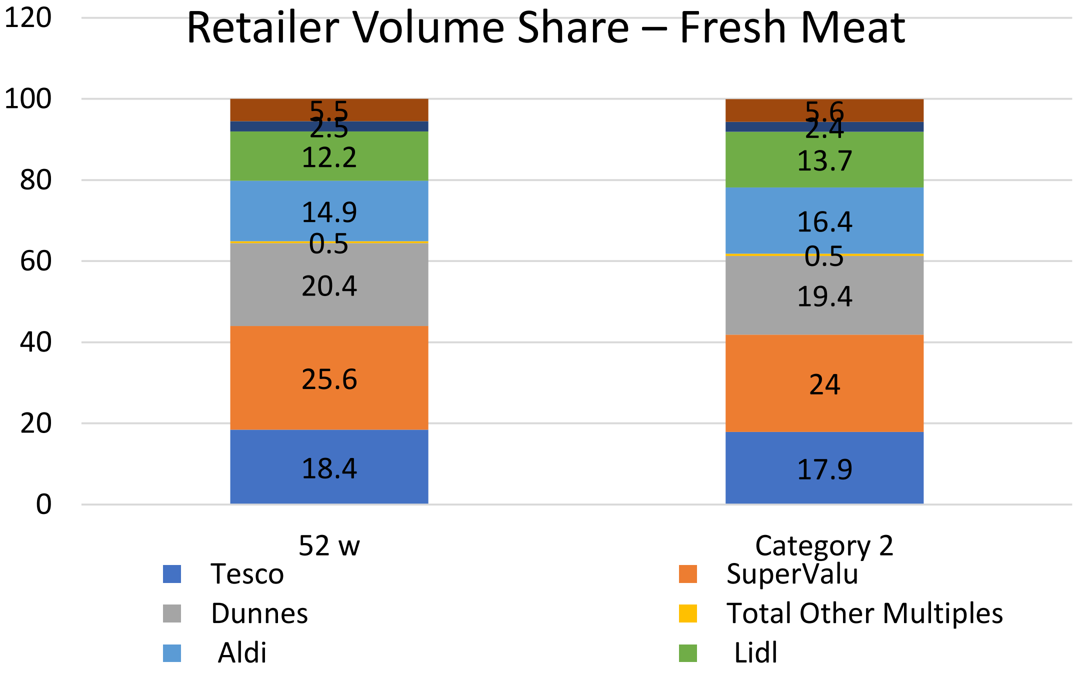
Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	1,179,707	1,258,006	+78,299	+6.6%
Volume (000 kg)	153,178	163,002	+9,824	+6.4%
Penetration (%)	98.85	98.82	-0.03	-0.0%
Frequency	81.80	82.10	+0.30	+0.4%
Spend per Buyer (£)	686.16	722.26	+36.11	+5.3%
Volume per Buyer (kg)	89.09	93.59	+4.49	+5.0%
Spend per Trip (€)	8.39	8.80	+0.41	+4.9%
Volume per Trip (kg)	1.09	1.14	+0.05	+4.7%
Price per kg (€)	7.70	7.72	+0.02	+0.2%





Source: Kantar: 52 w/e 06 Sep 20 vs LY

Retailer Volume Share for Fresh Meat. Supervalu strongest with just under a quarter share of the Organic Meat volume market.



	YoY Change
Tesco	3.5%
SuperValu	-0.4%
Dunnes	1.3%
Aldi	17.6%
Lidl	20.2%
Total Other Multiples	3.3%
Total Symbols	3.9%
Other Outlets	8.0%

Source: Kantar volume 52 wks w/e 06/09/20 v LY

Organic Meat - SKUS

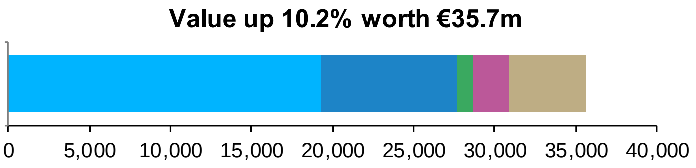
Branded	SKUS
Good Herdsman Organic	7
Hodgins	1
Oliver Carty	1

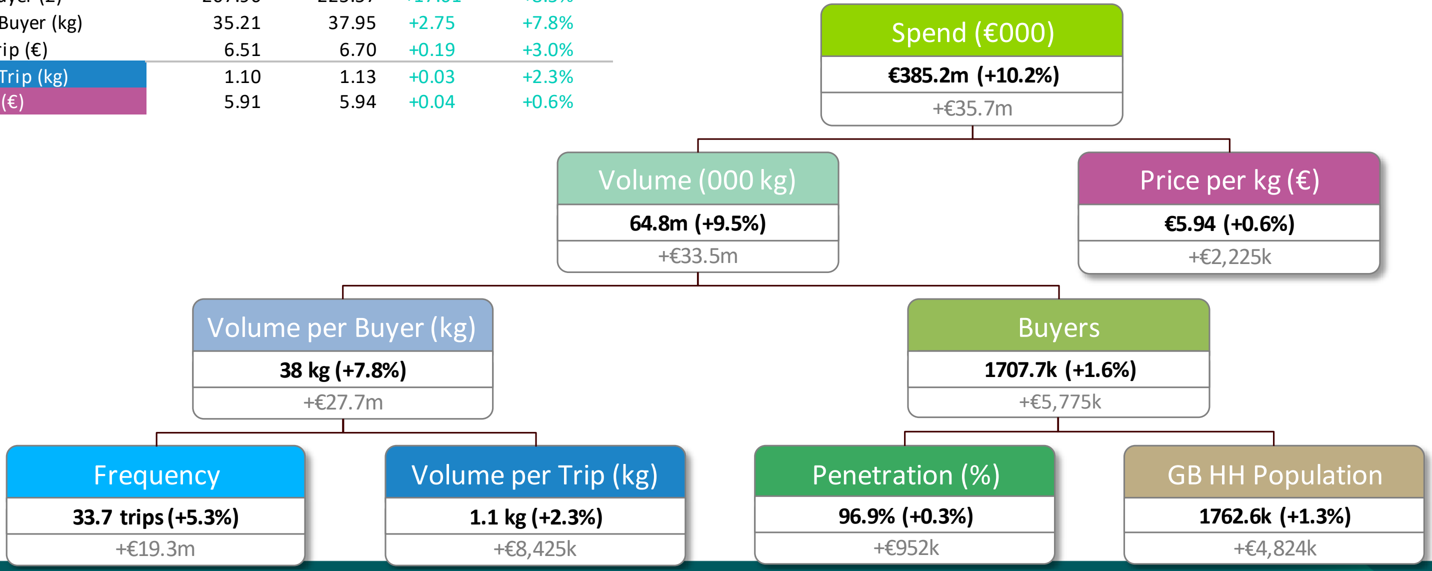
PL	SKUS
Aldi	4
Dunnes	5
Lidl	2
Supervalu	7
Tesco	3

Source: Kantar

Total Fresh Poultry valued at €385m and achieving growth of 10.2% year on year driven by frequency of shop and volume increase.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	349,526	385,205	+35,680	+10.2%
Volume (000 kg)	59,174	64,815	+5,641	+9.5%
Penetration (%)	96.63	96.89	+0.26	+0.3%
Frequency	31.95	33.65	+1.71	+5.3%
Spend per Buyer (£)	207.96	225.57	+17.61	+8.5%
Volume per Buyer (kg)	35.21	37.95	+2.75	+7.8%
Spend per Trip (€)	6.51	6.70	+0.19	+3.0%
Volume per Trip (kg)	1.10	1.13	+0.03	+2.3%
Price per kg (€)	5.91	5.94	+0.04	+0.6%

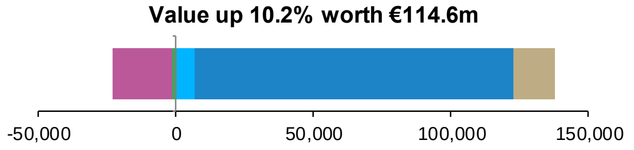


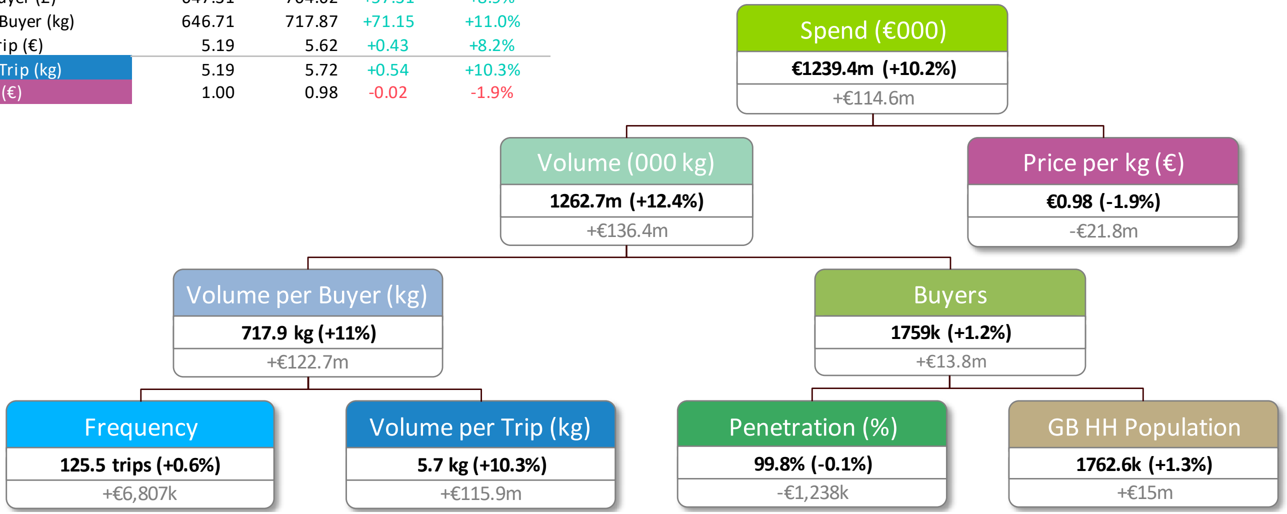


Source: Kantar: 52 w/e 06 Sep 20 vs LY

Total Hens Eggs valued at €1.239b and achieving growth of 10.2% year on year.

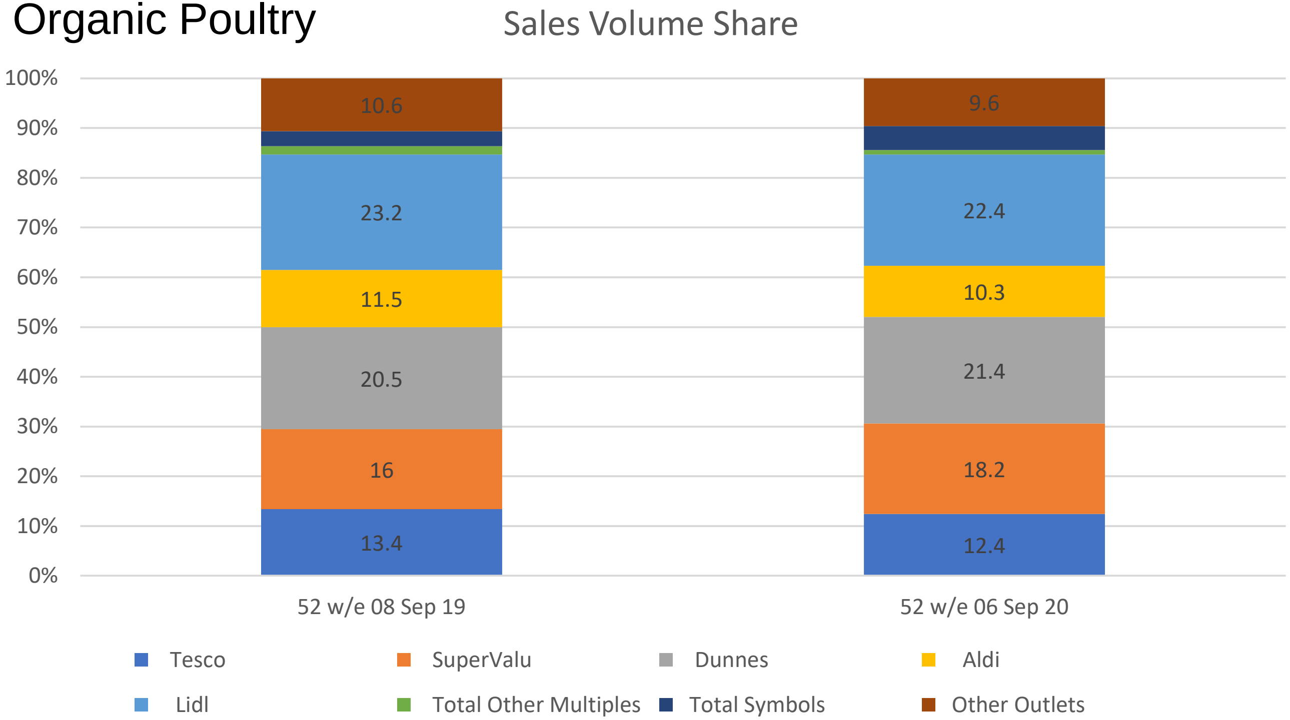
Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	1,124,826	1,239,431	+114,605	+10.2%
Volume (000 kg)	1,123,791	1,262,736	+138,945	+12.4%
Penetration (%)	99.91	99.80	-0.11	-0.1%
Frequency	124.71	125.47	+0.76	+0.6%
Spend per Buyer (£)	647.31	704.62	+57.31	+8.9%
Volume per Buyer (kg)	646.71	717.87	+71.15	+11.0%
Spend per Trip (€)	5.19	5.62	+0.43	+8.2%
Volume per Trip (kg)	5.19	5.72	+0.54	+10.3%
Price per kg (€)	1.00	0.98	-0.02	-1.9%





Lidl remains top share in Organic Poultry volume at 22.4% but share is in decline. Dunnes, Supervalu gaining share in the category.

Organic Poultry



	YoY Change
Tesco	14%
SuperValu	39%
Dunnes	28%
Aldi	10%
Lidl	18%
Total Other Multiples	-32%
Total Symbols	94%
Other Outlets	10%

BORD BIA
IRISH FOOD BOARD

Source: Kantar volume 52 wks w/e 06/09/20 v LY

Organic Poultry- SKUS

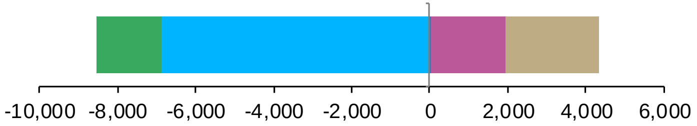
Branded	SKUS
Connolly	1
Golden Irish	1
Greenfield	1
Moy Park	3
Maple Farm	1
O'Egg	1

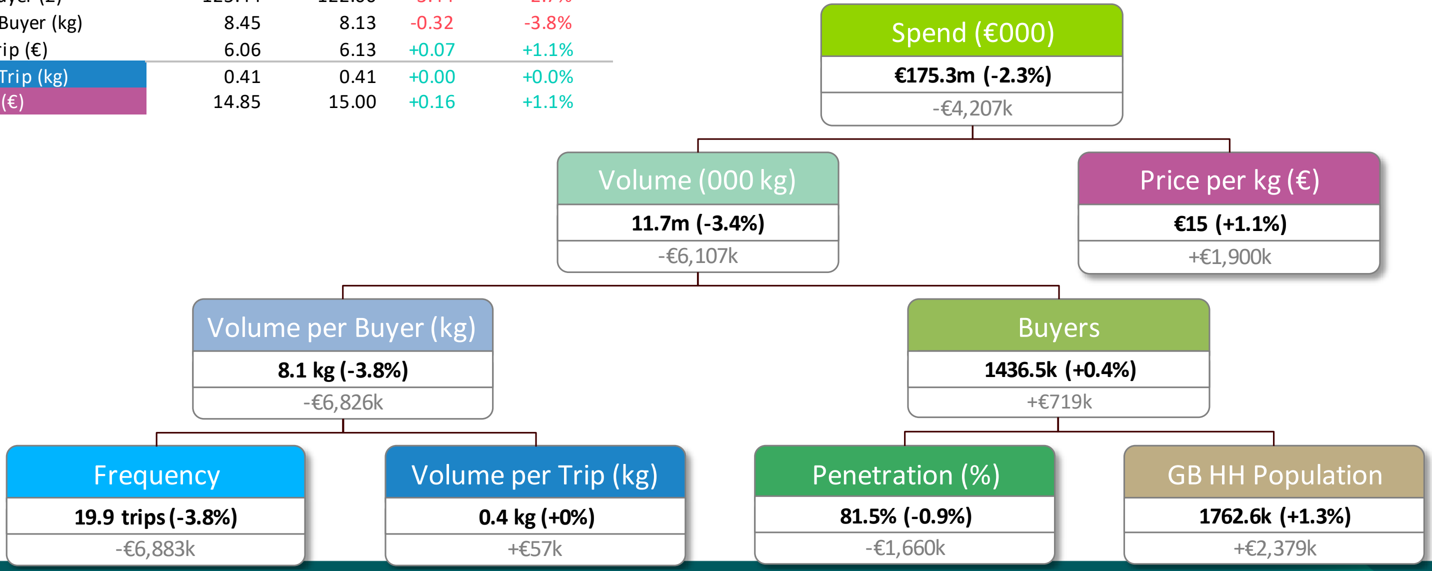
PL	SKUS
Aldi	3
Dunnes	3
Lidl	1
Supervalu	1
Tesco	2

Total Fish is valued at €175m and is down -2.3% Year on year driven by shoppers leaving the category and a major decrease in shopper frequency.

Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	179,462	175,255	-4,207	-2.3%
Volume (000 kg)	12,089	11,680	-408	-3.4%
Penetration (%)	82.25	81.50	-0.75	-0.9%
Frequency	20.70	19.91	-0.79	-3.8%
Spend per Buyer (£)	125.44	122.00	-3.44	-2.7%
Volume per Buyer (kg)	8.45	8.13	-0.32	-3.8%
Spend per Trip (€)	6.06	6.13	+0.07	+1.1%
Volume per Trip (kg)	0.41	0.41	+0.00	+0.0%
Price per kg (€)	14.85	15.00	+0.16	+1.1%

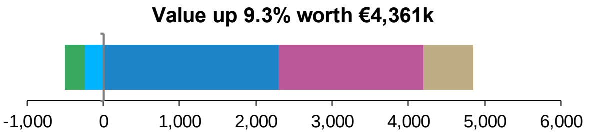
Value down 2.3% worth €4,207k

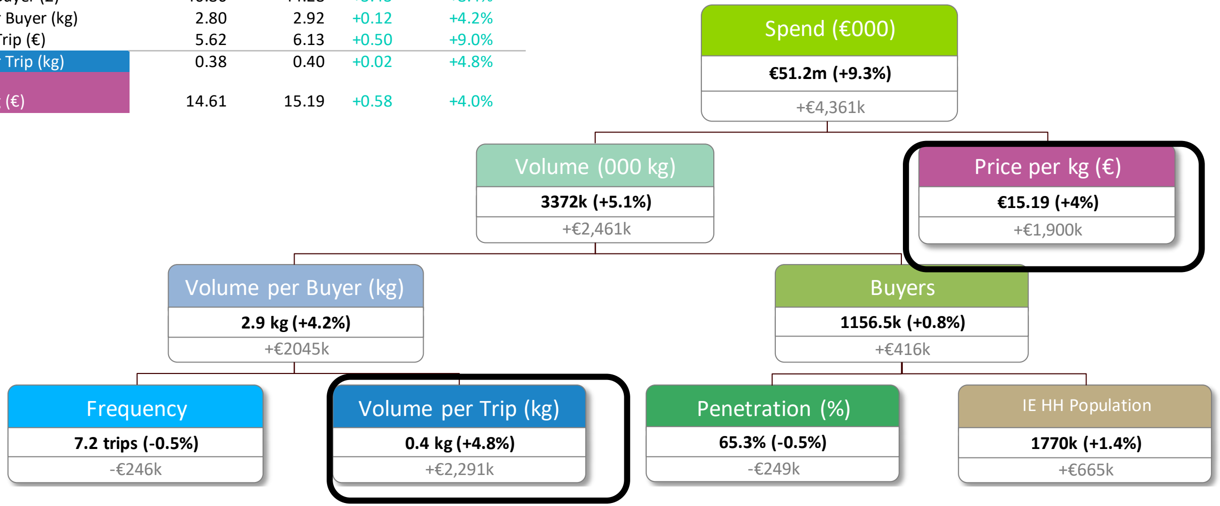




On the other hand, Fresh Prepacked is in growth with shoppers favouring this option of fresh fish.

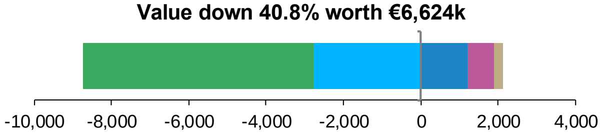
Measure	16 w/e 16 Jun 19	16 w/e 14 Jun 20	Change (Actual)	Change (%)
Spend (€000)	46,852	51,213	+4,361	+9.3%
Volume (000 kg)	3,208	3,372	+164	+5.1%
Penetration (%)	65.69	65.34	-0.36	-0.5%
Frequency	7.27	7.23	-0.04	-0.5%
Spend per Buyer (£)	40.86	44.28	+3.43	+8.4%
Volume per Buyer (kg)	2.80	2.92	+0.12	+4.2%
Spend per Trip (€)	5.62	6.13	+0.50	+9.0%
Volume per Trip (kg)	0.38	0.40	+0.02	+4.8%
Price per kg (€)	14.61	15.19	+0.58	+4.0%

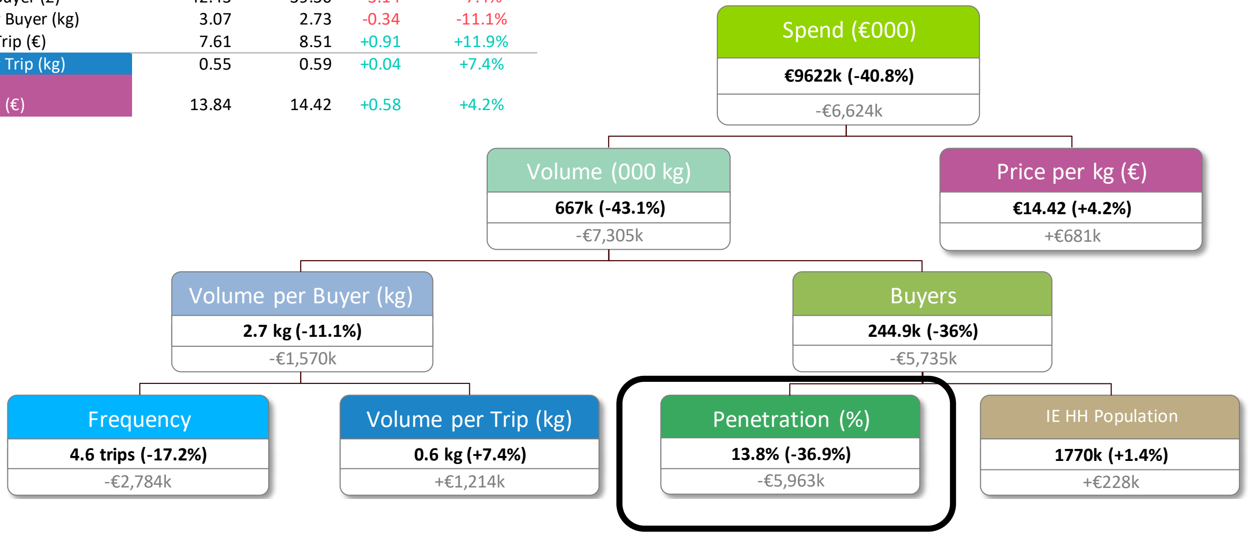




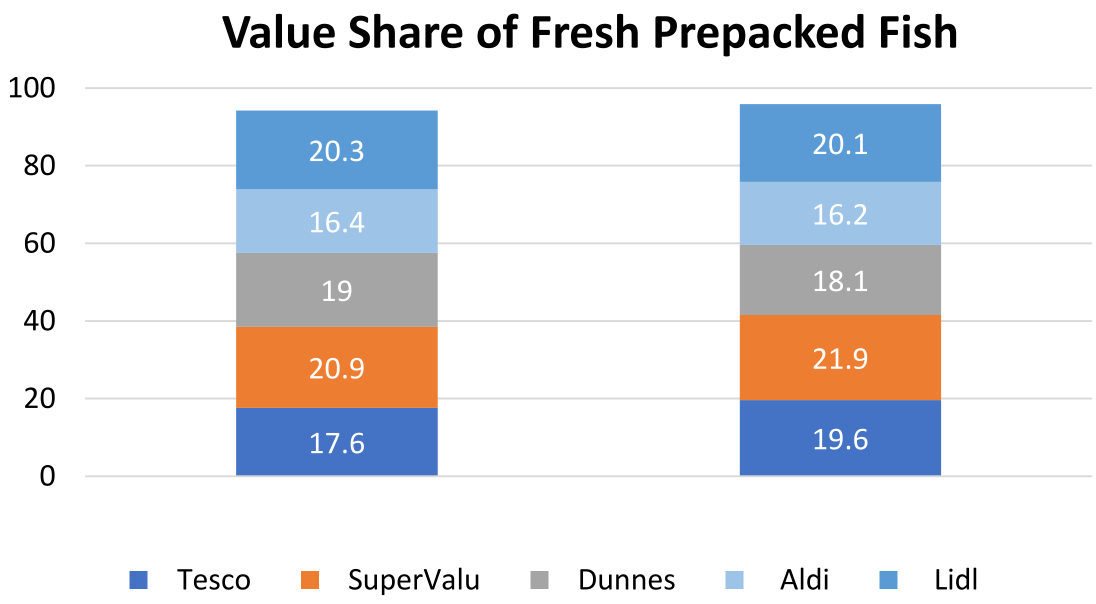
The declines in Loose Fish have resulted in losses worth €6.6m to the category as shoppers flee the fresh counters.

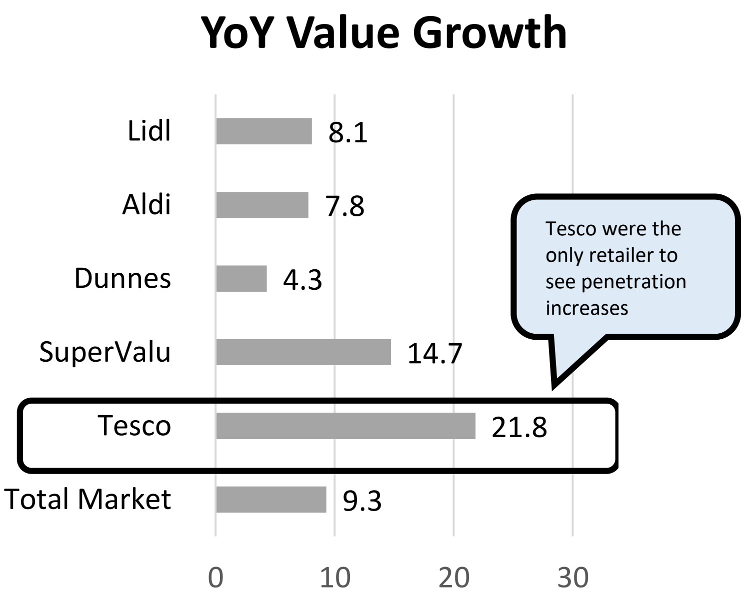
Measure	16 w/e 16 Jun 19	16 w/e 14 Jun 20	Change (Actual)	Change (%)
Spend (€000)	16,246	9,622	-6,624	-40.8%
Volume (000 kg)	1,174	667	-506	-43.1%
Penetration (%)	21.93	13.83	-8.10	-36.9%
Frequency	5.58	4.62	-0.96	-17.2%
Spend per Buyer (£)	42.43	39.30	-3.14	-7.4%
Volume per Buyer (kg)	3.07	2.73	-0.34	-11.1%
Spend per Trip (€)	7.61	8.51	+0.91	+11.9%
Volume per Trip (kg)	0.55	0.59	+0.04	+7.4%
Price per kg (€)	13.84	14.42	+0.58	+4.2%





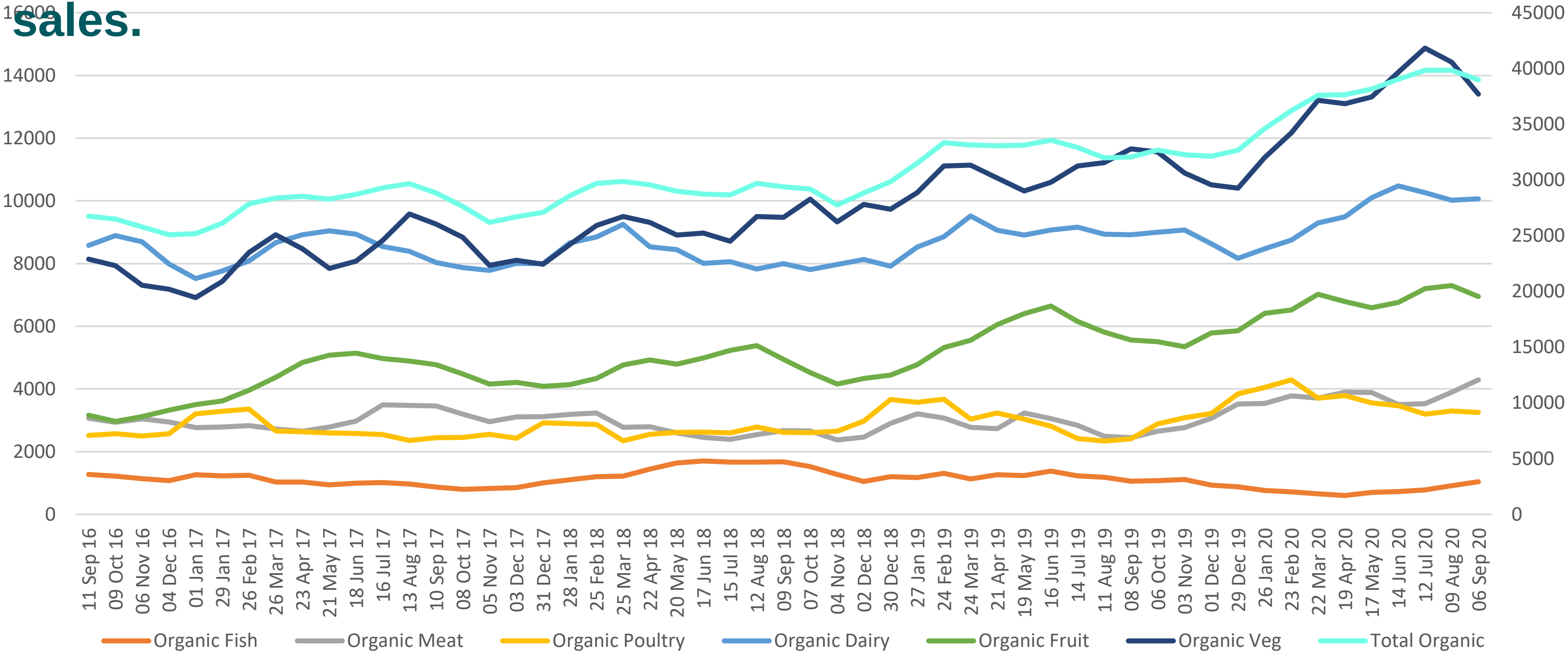
SuperValu maintain the highest share in Prepacked Fish while Tesco grew the fastest in this 16 week period





Source: Kantar 16 wk w/e 14th June 2020

Covid 19/Shoppers attitudes to purchasing loose fish and the closure of Loose Fresh Fish Counter space in retail has impacted on Fish sales.



11. Summary & Key Findings

Shoppers favouring a prepacked option over loose post covid

Loose fish sees strong declines of -40.8%. Retailers closing their fishcounters as well as shoppers favouring a safer option are the likely causes driving these declines post covid

Tesco pushing prepacked and leaving loose

Tesco sees the biggest shift within its Fresh Fish offering. It closes its fish counters and in turn sees the strongest growth in its prepacked offering

Busier Households are seeing the strongest growth

Older Dependents, Middle Families and 45+ Families are the lifestages seeing the highest growth in prepacked fish. These household are likely to have become busier post covid which is likely to have resulted in this strong growth

Organic Fish - SKUS

Product Description	Branded_PL	Range	Market	Sub_Market	Organic
ALDI SS OG NTL FLT SLM 240G	Private Label	Aldi Spclly Slctd Organic	Wet/Smoked Fish	Salmon	Organic
Aldi Specially Selected Organic Irish Cold Smoked Salmon	Private Label	Aldi Spclly Slctd Organic	Wet/Smoked Fish	Smoked Salmon	Organic
Dunnes Organic King Prawns Chilled Tray With Cello Cooked Shelled 90g Cooked Active Date 201606	Private Label	Dunnes Organic	Shellfish	Prawns	Organic
Dunnes Stores Organic Salmon Fillet Loose From Fish Counter	Private Label	Dunnes Organic	Wet/Smoked Fish	Salmon	Organic
Dunnes Stores Organic Smoked Salmon Vac Packed On Card Sleeve Numer Of Slices Not Stated 100g	Private Label	Dunnes Organic	Wet/Smoked Fish	Smoked Salmon	Organic
Dunnes Stores Organic Salmon Darne Chilled Loose From Fish Counter	Private Label	Dunnes Organic	Wet/Smoked Fish	Salmon	Organic
Dunnes Stores Simply Better Organic 2 Salmon Darnes Vac Packed On Card Chilled 220g	Private Label	Dunnes Simply Better	Wet/Smoked Fish	Salmon	Organic
Dunns Of Dublin Smoked Irish Organic Salmon Fillet 100g Fresh Chilled	Branded	Dunns Of Dublin Organic	Wet/Smoked Fish	Smoked Salmon	Organic
Keohanes Of Bantry 2 Irish Organic Salmon Darnes 240g Chilled Vac Packed On Card	Branded	Keohanes Organic	Wet/Smoked Fish	Salmon	Organic
Kinvara Organic Smoked Salmon Fillet,Vac,100g.Chilled Sliced Fillets	Branded	Kinvara	Wet/Smoked Fish	Smoked Salmon	Organic
Kinvara Organic Smoked Salmon 70g Fillet Vac Fresh Chilled- Slices Number Not Stated	Branded	Kinvara	Wet/Smoked Fish	Smoked Salmon	Organic
Inismara (Lidl) 2 Irish Organic Salmon Darnes With Skin 220g Tray With Cello Chilled	Private Label	Lidl Organic	Wet/Smoked Fish	Salmon	Organic
MR GOODS OG S SLM OTH SLC 90G	Branded	Mr Goods	Wet/Smoked Fish	Smoked Salmon	Organic
Nolans Organic Smoked Salmon Chilled Sliced Vac Packed 100g Number Of Slices Not Stated	Branded	Nolans Organic	Wet/Smoked Fish	Smoked Salmon	Organic
Burren Smokehouse Hot Smoked Over Oak With Spices Organic Salmon 90g	Branded	OB Organic	Wet/Smoked Fish	Smoked Salmon	Organic
Supervalu Organic Smoked Salmon Fillet Vac Packed Sliced No Of Slices Not Stated Fresh Chilled 100g	Private Label	Supervalu (Ireland)	Wet/Smoked Fish	Smoked Salmon	Organic
Supervalu Organic King Prawns 90g Chilled Cooked Tray With Cello Warm Water	Private Label	Supervalu Organic	Shellfish	Prawns	Organic
TSC OG S SLM SCO SLC 120G	Private Label	Tesco Organic	Wet/Smoked Fish	Smoked Salmon	Organic

Key Takeouts For How Covid-19 has impacted the Irish Take Home Seafood Market

Shopper make much bigger trips less frequently

At a total grocery level, we see shoppers make much bigger trips less frequently as they look to minimise store visits. This feeds through to the seafood market where volume is a key driver of growth while frequency is in decline for Fresh Fish offerings

Frozen Fish is the key performer

Frozen Fish fares the best in the total seafood market seeing increases in all KPIs. Shoppers are opting for goods with longer shelf lives which is exactly what Frozen fish provides

Shoppers trade up to brands

Brands see strong growth particularly across Frozen Fish which drives up Average Price. Shoppers lean towards brands in times of crisis which mirrors what we see in the Total Grocery Market

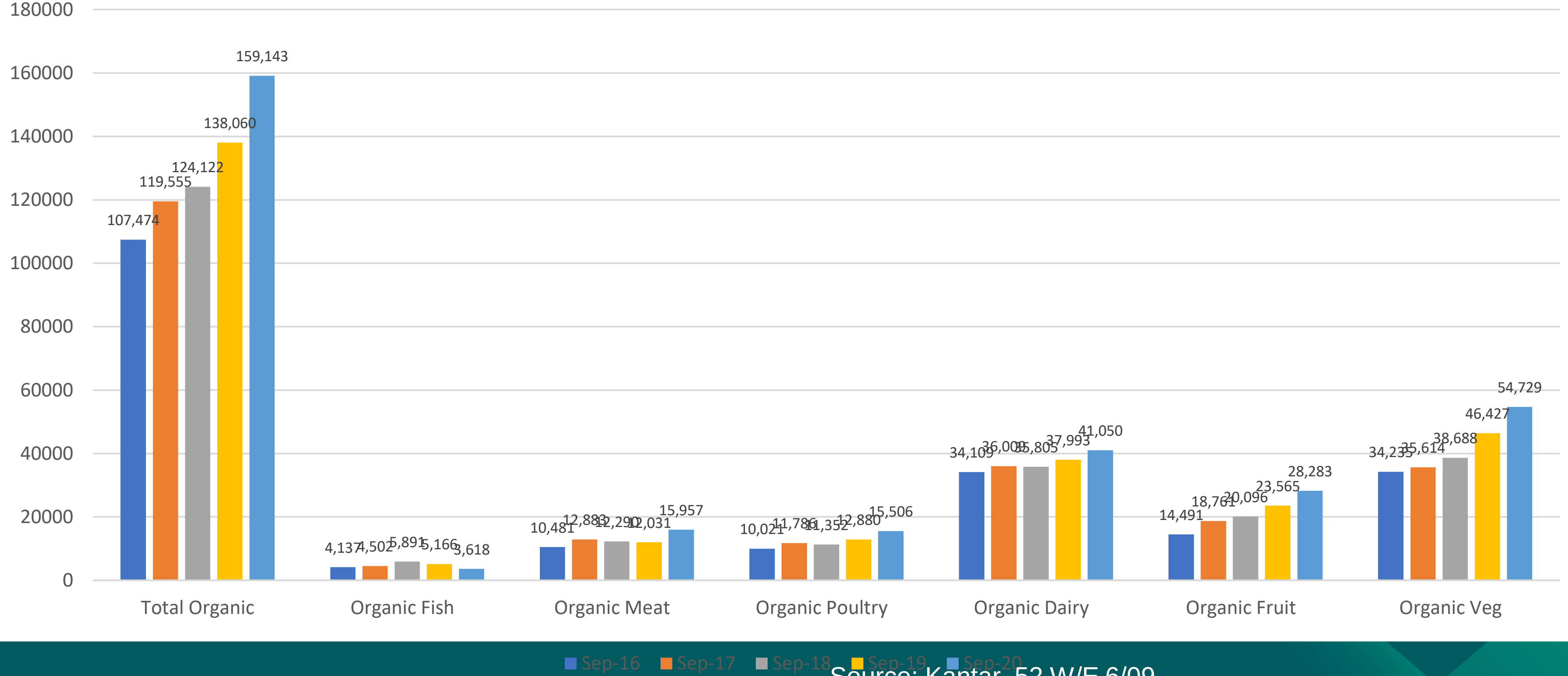
Fresh beef, pork and poultry win

Pre-Covid, most fresh proteins were in decline. However, post Covid fresh beef and poultry see strong growth. Shoppers favour these offerings over fresh fish likely due to price, ease of cooking and being a more accessible option for shoppers

Shoppers favour prepacked over loose

Pre- Covid loose fish was in decline however, the pandemic has only heightened this. Many retailers closed their fish counters as shoppers likely favoured the fresh prepacked fish offerings

All Organic categories have seen strong growth with the exception Fish.

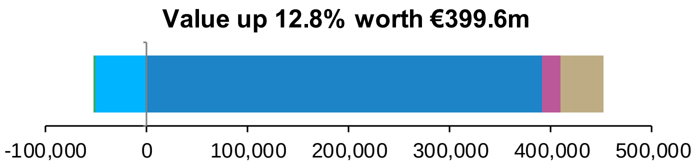


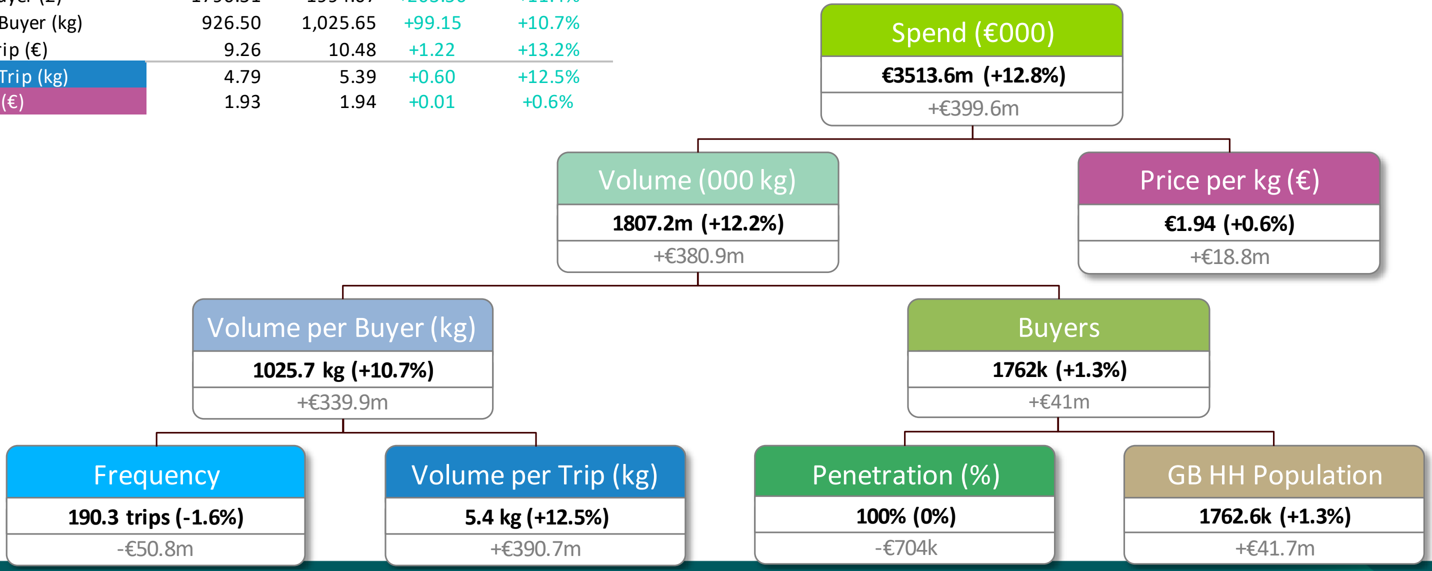
Source: Kantar 52 W/E 6/09

Excludes * FoodService, Independent Retail, Home Subscription/Markets

Total Ambient Groceries valued at €3.513b and in growth by 12.8% year on year driven by an increase in volume per trip.

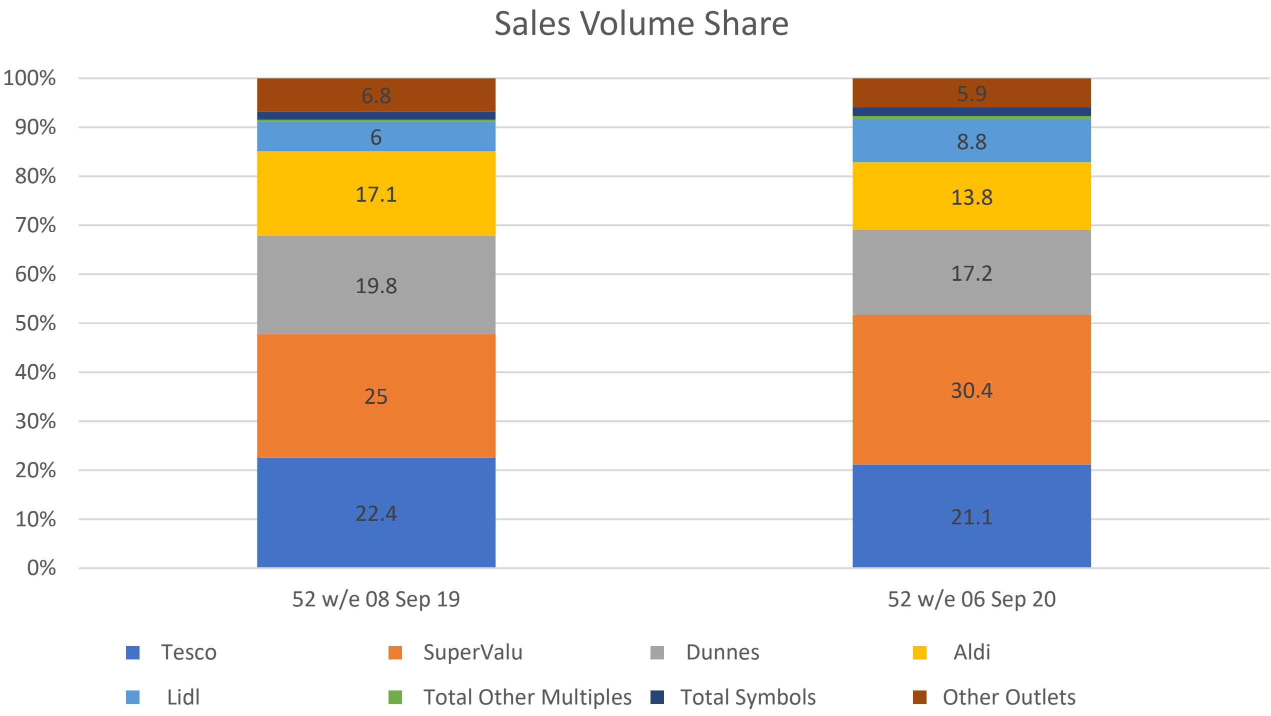
Measure	52 w/e 08 Sep 19	52 w/e 06 Sep 20	Change (Actual)	Change (%)
Spend (€000)	3,114,022	3,513,647	+399,625	+12.8%
Volume (000 kg)	1,611,348	1,807,242	+195,894	+12.2%
Penetration (%)	99.99	99.97	-0.02	-0.0%
Frequency	193.41	190.25	-3.16	-1.6%
Spend per Buyer (£)	1790.51	1994.07	+203.56	+11.4%
Volume per Buyer (kg)	926.50	1,025.65	+99.15	+10.7%
Spend per Trip (€)	9.26	10.48	+1.22	+13.2%
Volume per Trip (kg)	4.79	5.39	+0.60	+12.5%
Price per kg (€)	1.93	1.94	+0.01	+0.6%





Supervalu dominant also in volume terms.

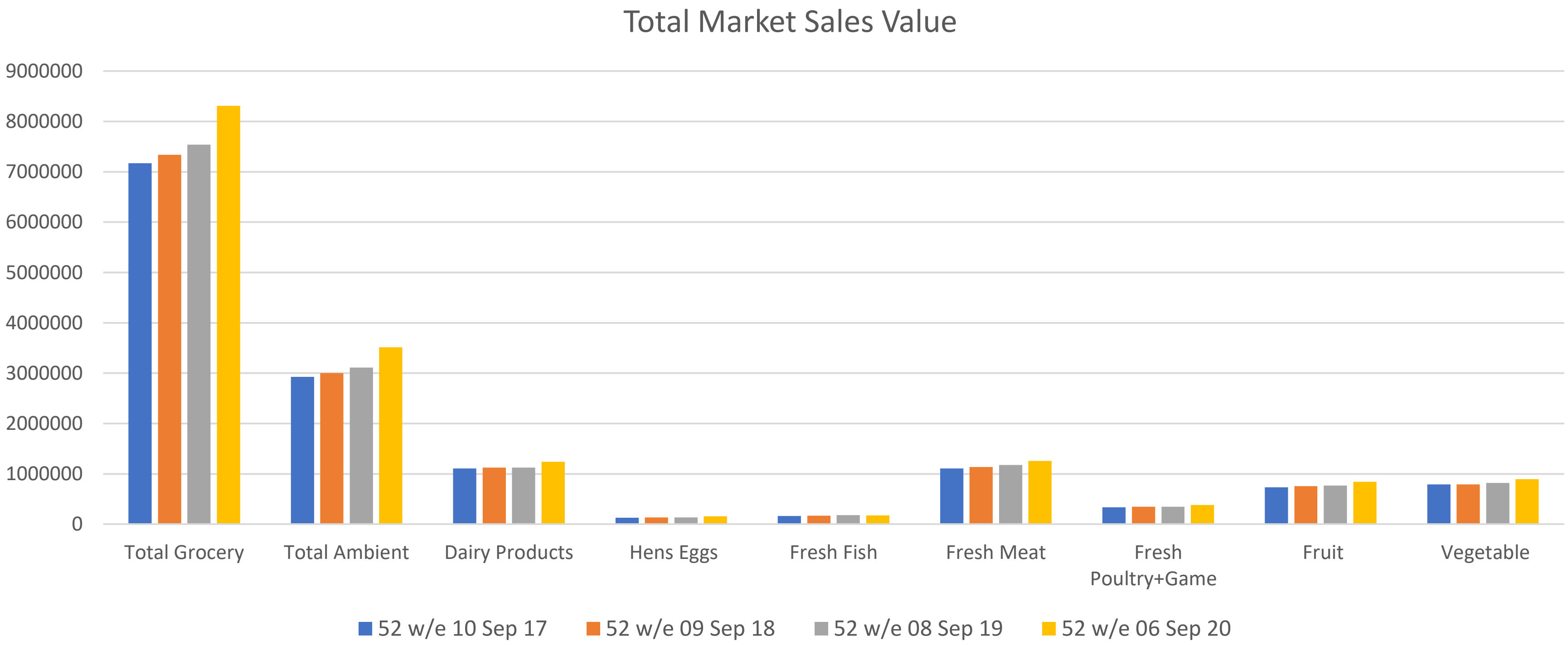
Organic Ambient



	YoY Change
Tesco	18.8%
SuperValu	53.8%
Dunnes	9%
Aldi	1.6%
Lidl	83.7%
Total Other Multiples	71.7%
Total Symbols	40.6%
Other Outlets	9.5%

Source: Kantar volume 52 wks w/e 06/09/20 v LY

Total Category Value is in growth with the exception of Fish



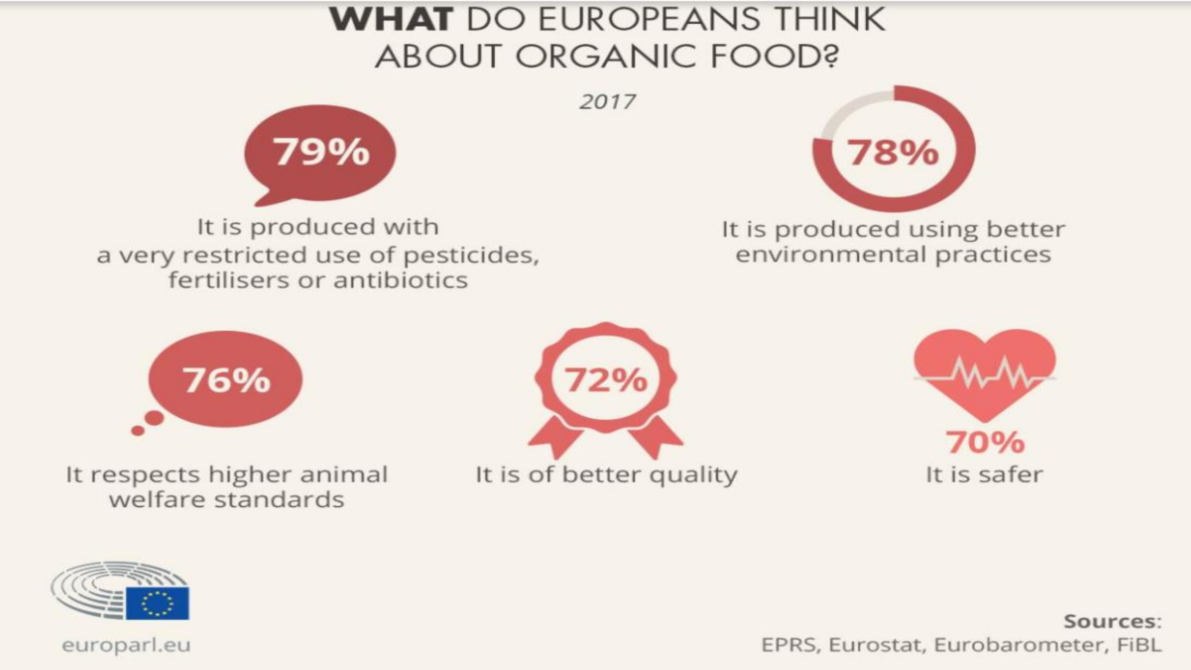
Source: Kantar 52 W/E 6/09

Market Value

Source: www.europarl.europa.eu/news 12/10/2020

Consumer Attitudes around Organic

Consumer attitudes to Organic are in line with their evolving needs



Source: www.europarl.europa.eu/news 12/10/2020 bordbia.ie/industry/news/food-alerts/

Ariel House (Dublin... ECSL Online Learning Search results google Discs are dying! Ho... High-fiber, healthie... US breakfast trends...

opportunities for retailers and those supplying them to acquire market share. Prior to lockdown, shoppers mainly purchased their groceries in-store and few retailers offered home delivery services.

Ongoing Adaptations in Retail

19 October 2020

Food and drink retailers were forced to quickly adapt under pressure through the early months of the Covid-19 pandemic. Retail sales were up across all food and drink categories an average of 30% in April and May. Elevated retail sales as restrictions were lifted mean that for the 52 weeks up to Sept 6th are 12 % more than the previous 52 weeks in Ireland.

First 1 2 3 4 5 6 7 8 9 10 Last Next

+ 12% Retail Sales 52 wk w/e 06/09

+16.2% Organic Sales 52 wk w/3 06/09