

KANTAR WORLD PANEL High definition inspiration



UK consumer attitudes and behaviours around sustainable food

Edward Garner - Communications Director



Free Range
Fairtrade
Rainforest Alliance
Local
Freedom Food
Outdoor reared

Organic

“Ignore what people say – watch what they do”

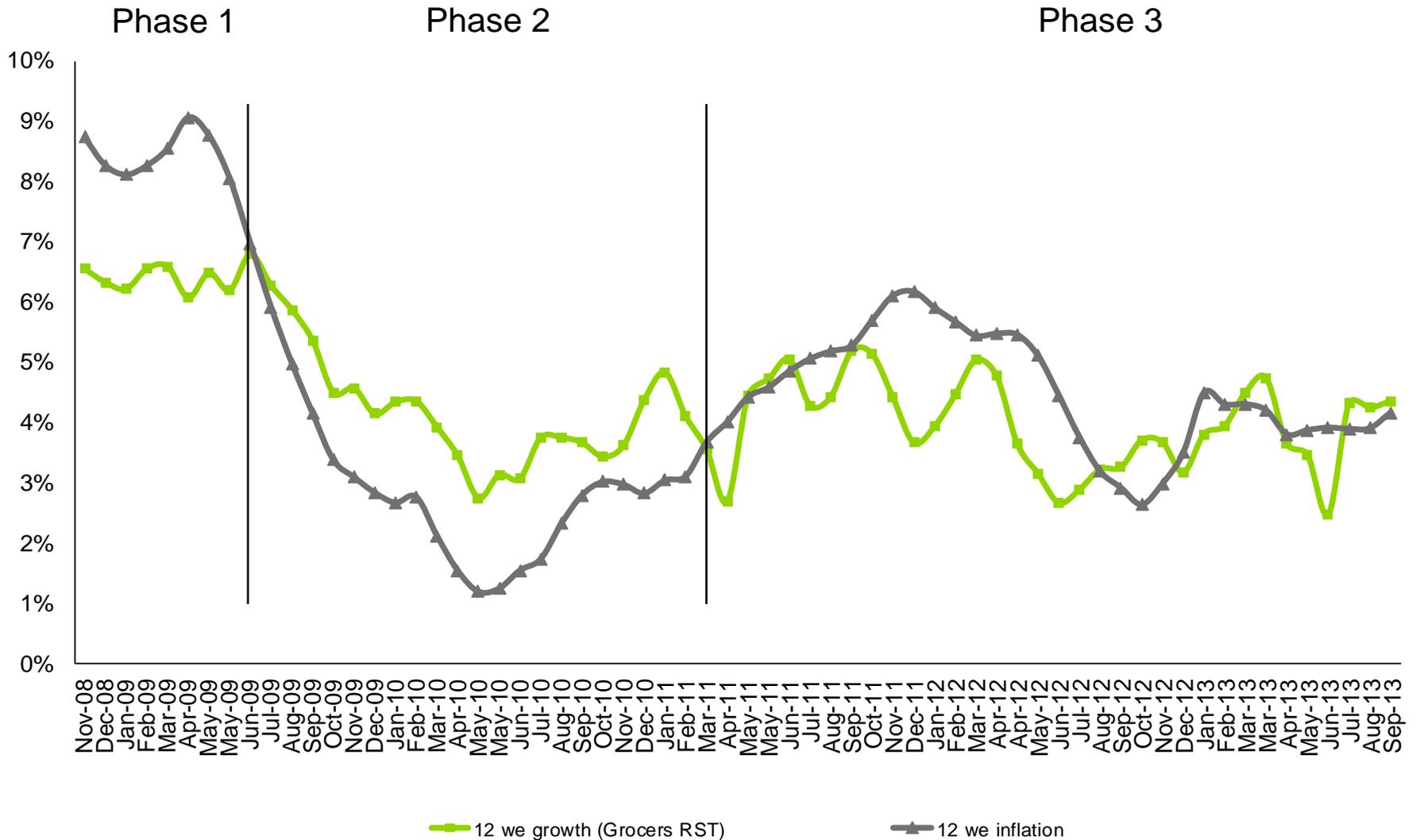
The Agenda

- Austerity
- Niches
- The Big 4
- Home Delivery
- Seeking Differentiation
- A role for Ethical Claims

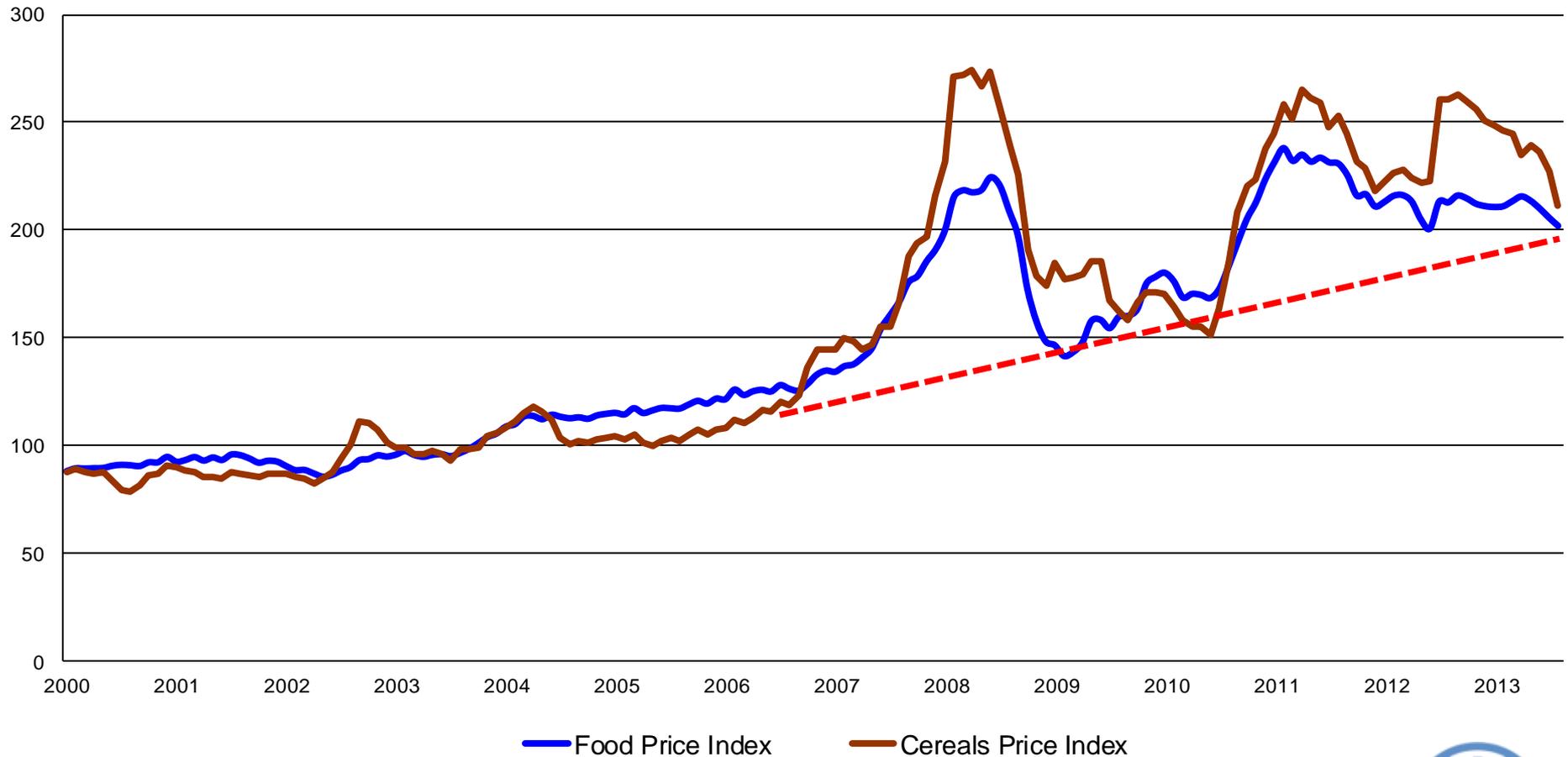


Grocery Market Growth v. Inflation

Now trailing inflation again



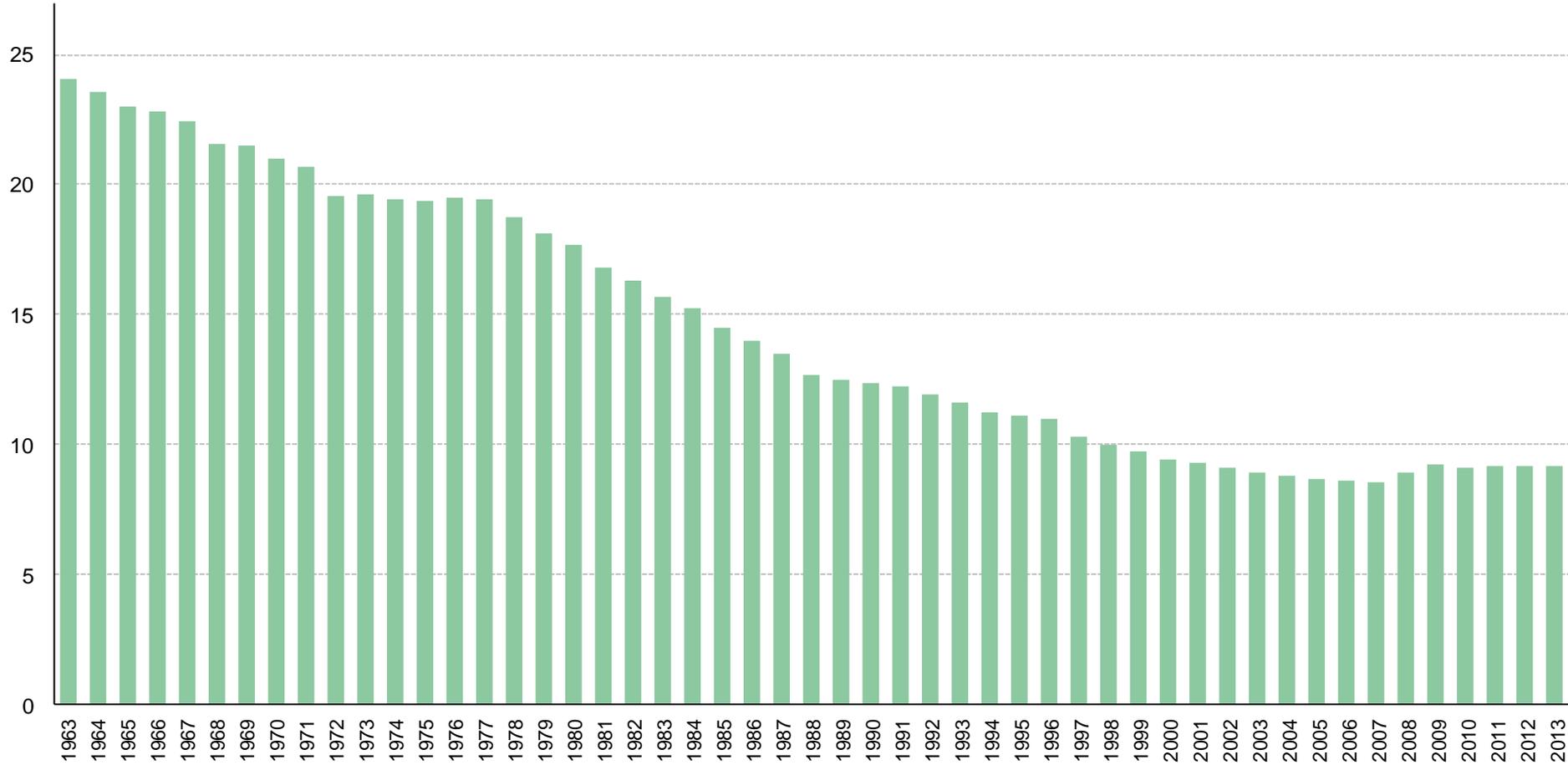
Global Food Price Indices



Food Price Index, UN FAO

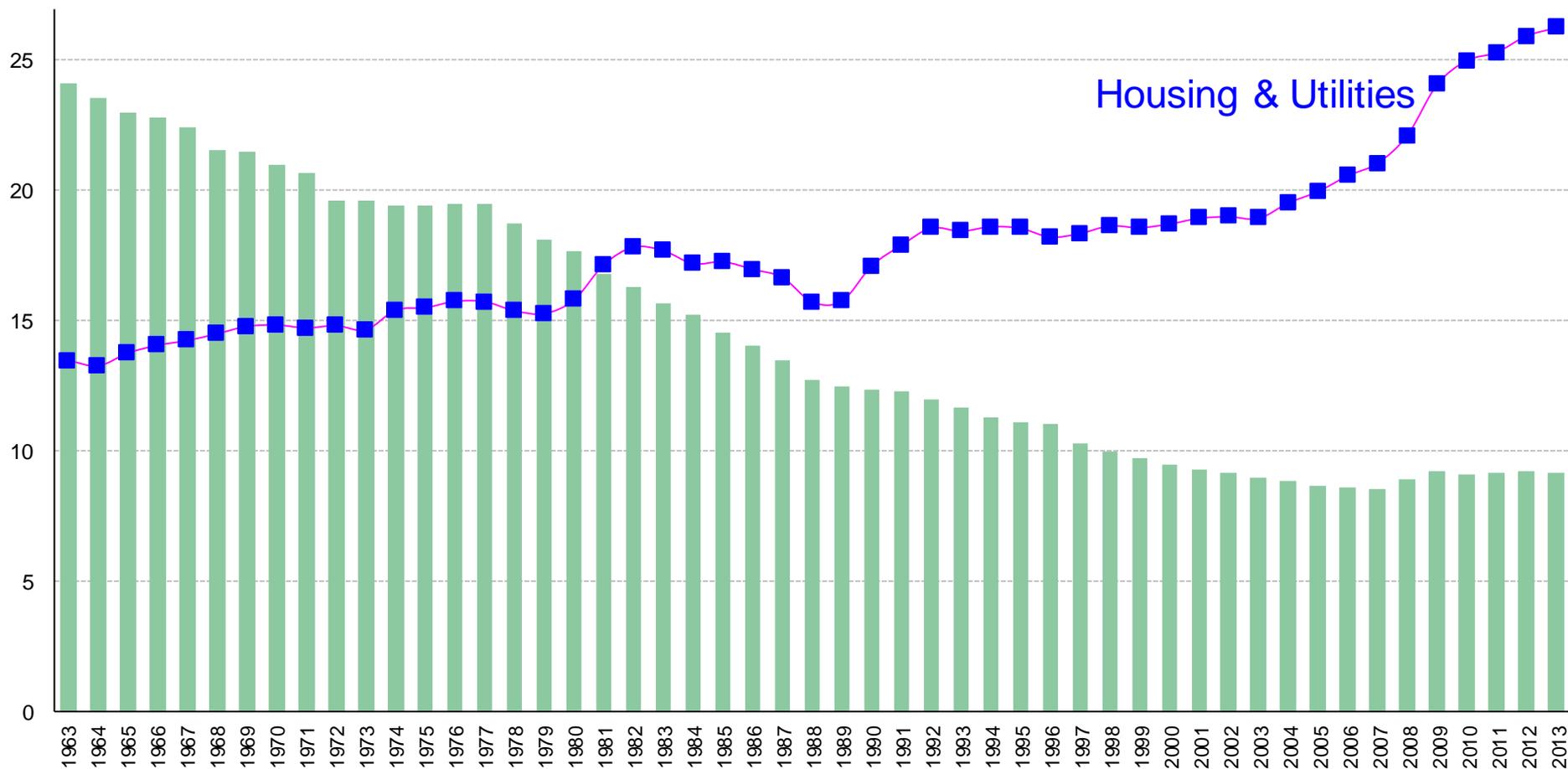


Food and Drink as a Proportion of UK Household Expenditure %



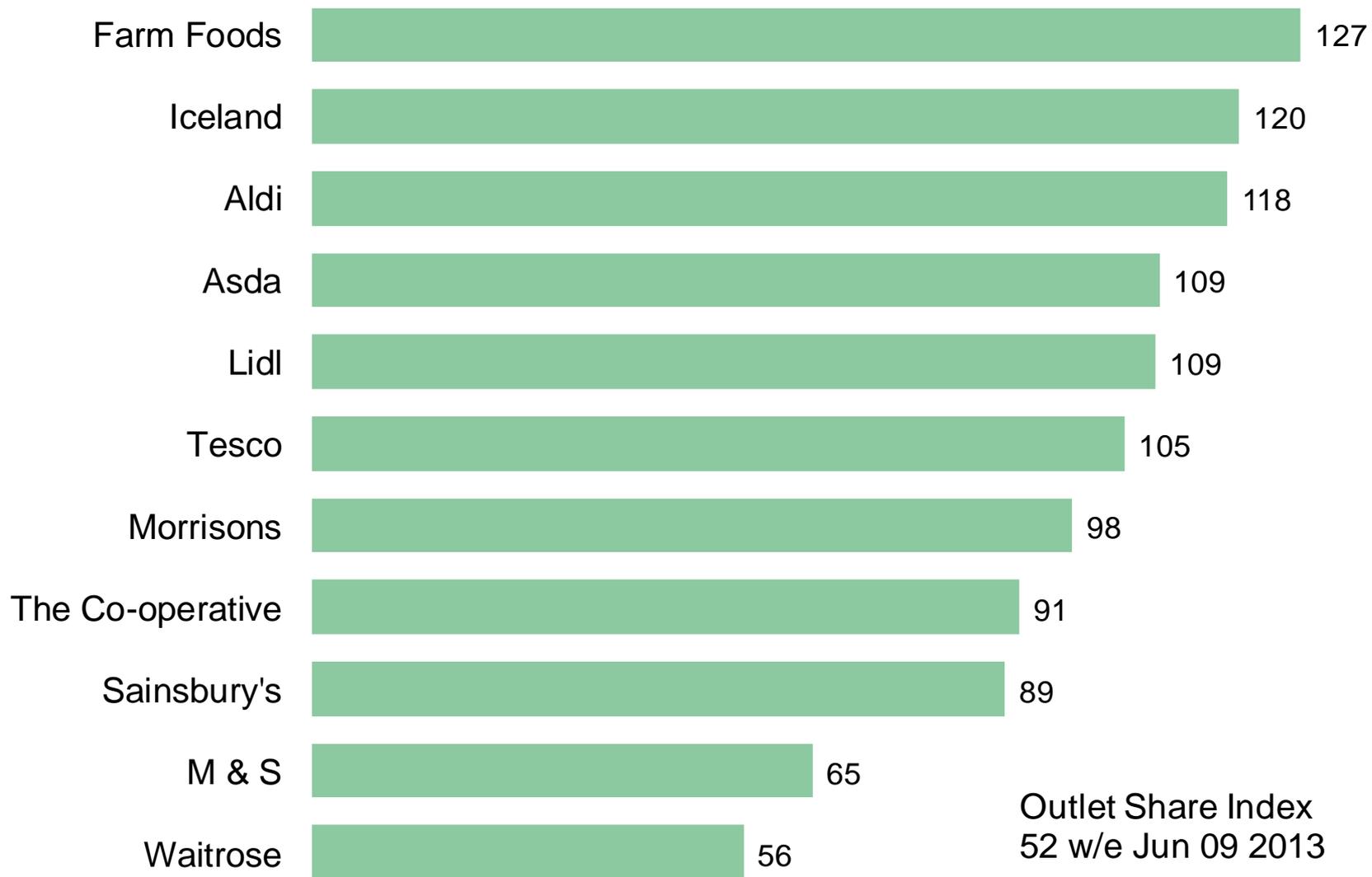
Source: ONS Series ABQI / ABZV

Food and Drink as a Proportion of UK Household Expenditure %



Source: ONS Series ABQI / ABZV

I Consider That Price Is The Most Important Factor When Buying A Product

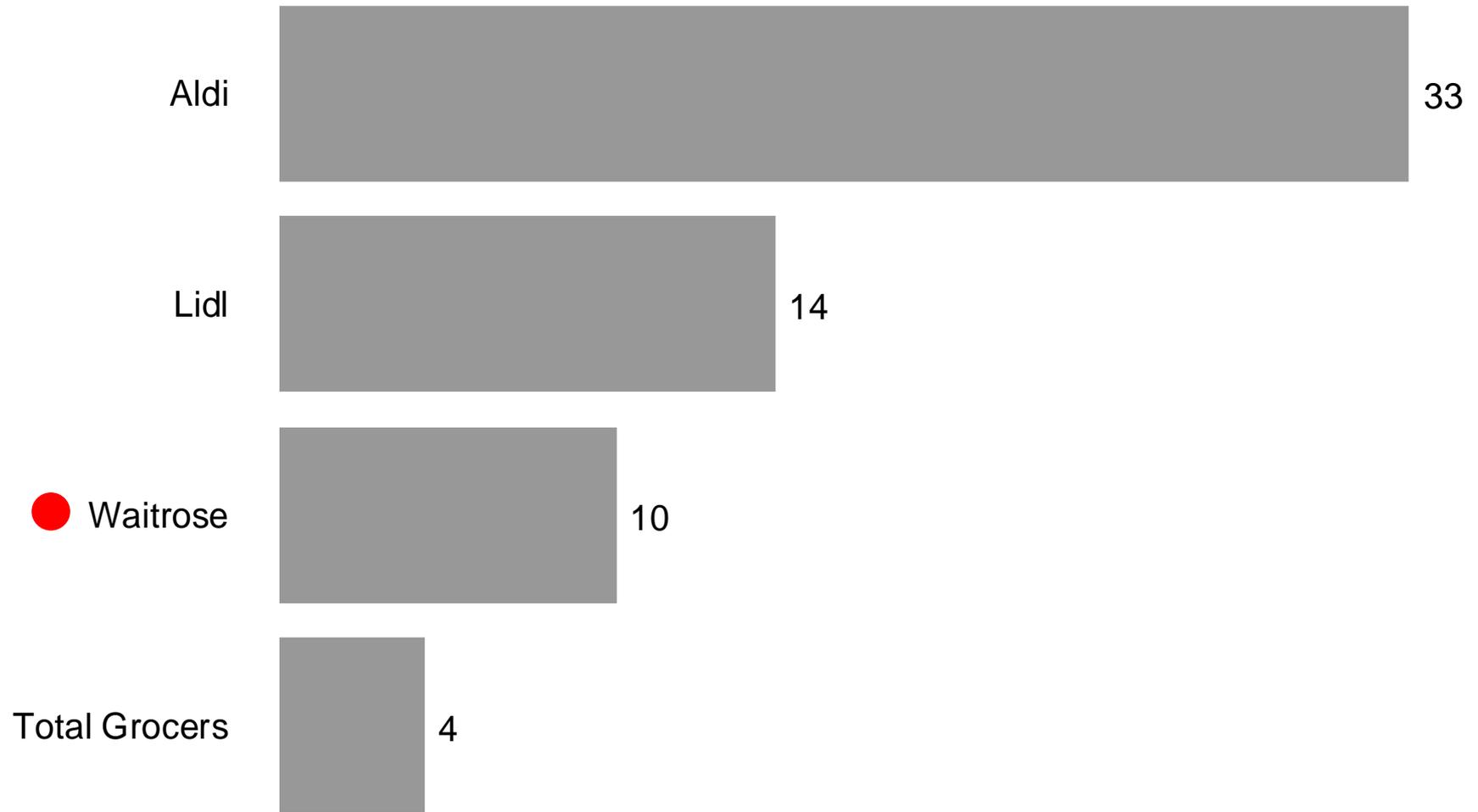


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Latest Quarter Till Roll Totals Expenditure Trends



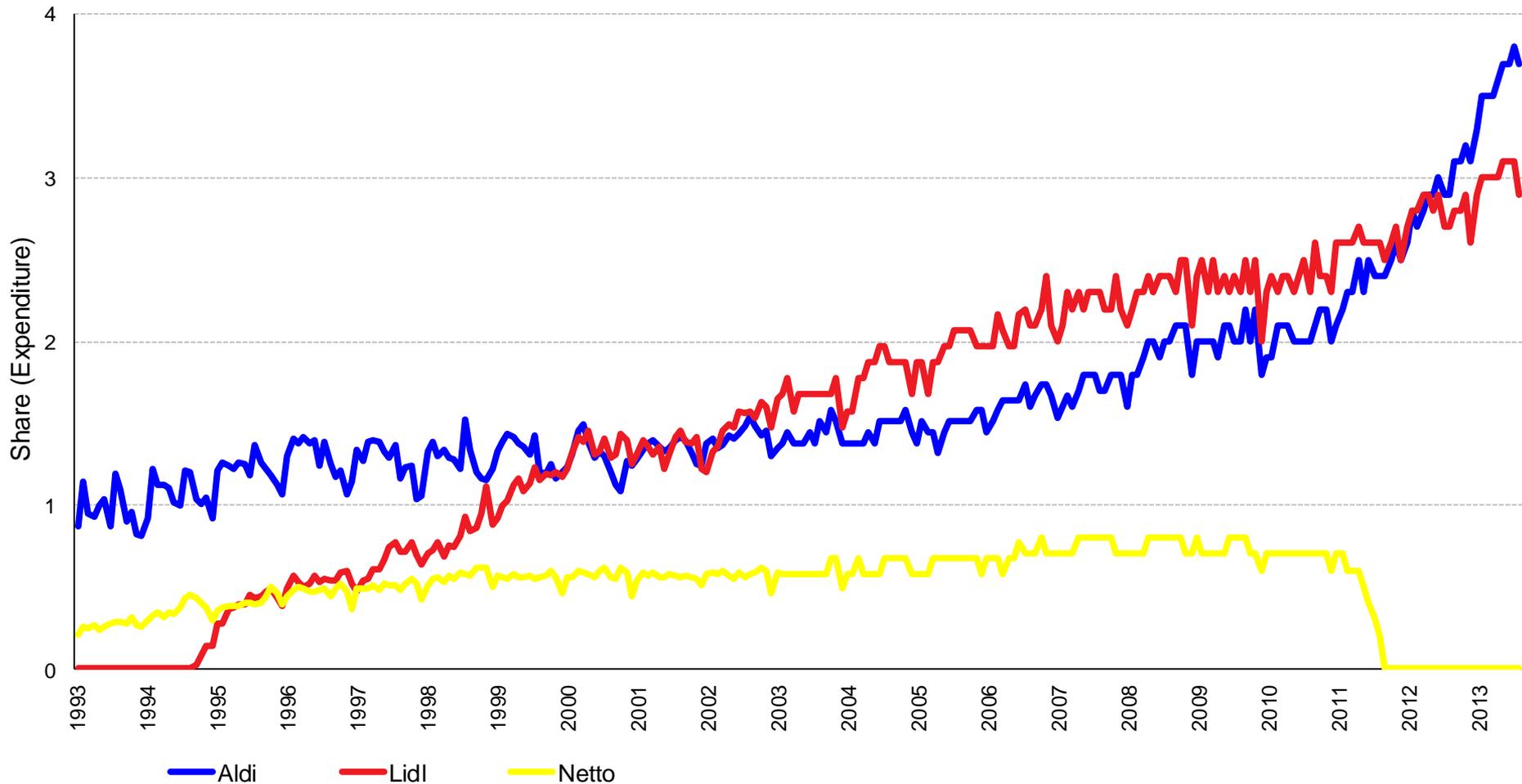
12 w/e Sep 15 2013 y/y % Change

Discounters





Long-Term Share of Till Roll Grocers





You are here: Home page → Shopping at Aldi → SWAP & SAVE → Swap and Save

Swap and Save

Swap and Save

Swap & Save over **35%***

LEADING BRANDS
£23.09
AT OTHER
SUPERMARKETS!

ALDI EXCLUSIVE
BRANDS
£14.27



Aldi. Like brands. Only cheaper.

Special Buys

Sun 17th Feb & Thurs 21st Feb
Click here to view our latest in-store leaflet >



Our Latest TV adverts

Like ALDI.
Like the price.
See our new TV ad >



Store Locator

Find your nearest store and its opening times in seconds >



Like to win £50?

Tell us which products you like >



60 Day Guarantee

Relax everything is covered. For more information click here >



Aldi, now on Twitter! Keep up to date with



You are here: [Homepage](#) → [Specialbuys](#) → Sunday 22nd September

Sunday 22nd September

[Sunday 29th September](#)

[Thursday 26th September](#)

[Coming Soon](#)

[Hurry While Stocks Last](#)

[In store leaflet](#)



[Cake Mix](#)

500g **£1.49**
29.8p per 100g



[Electric Chainsaw](#)

each **£54.99**



[Chainsaw Chain](#)

each **£9.99**



[Garden Bag](#)



[16 Piece Wrench Set](#)



[Safety Dealer Boots](#)



[Quartz Alarm Clock](#)

ALDI

auty

frozen

chilled



newspaper & magazines

household



Waitrose



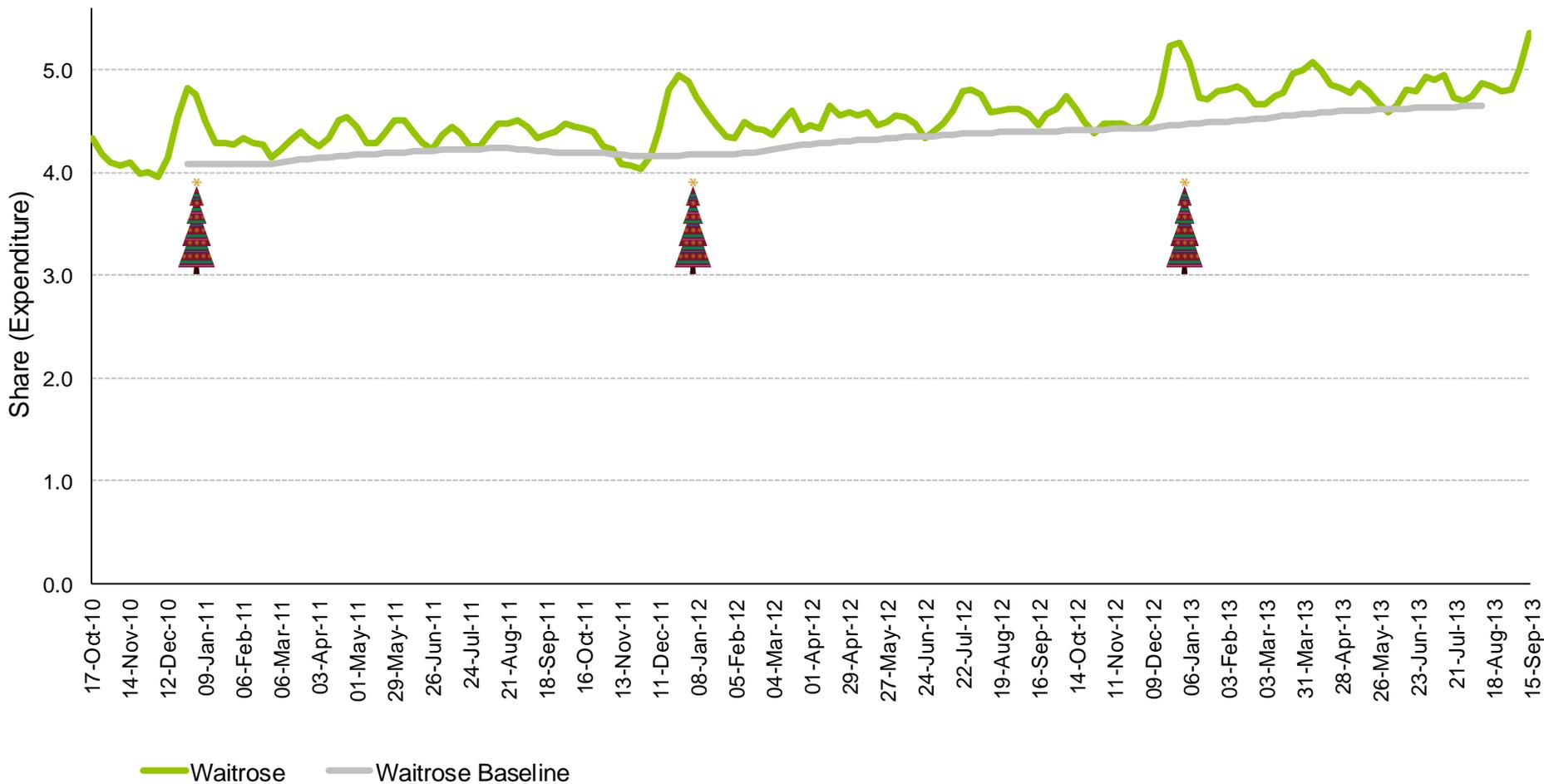
BY APPOINTMENT TO
HER MAJESTY THE QUEEN
GROCCER AND WINE MERCHANTS
WAITROSE LIMITED BRACKNELL



BY APPOINTMENT TO
HIS ROYAL HIGHNESS THE PRINCE OF WALES
GROCCER AND WINE MERCHANTS
WAITROSE LIMITED BRACKNELL



Waitrose Share of Till Roll Grocers



Weekly 3 Point Centred Moving Average

Waitrose Share Index

● I am prepared to pay more for organic food	205
I regard myself as a connoisseur of food and wine	191
● I actively seek out fair trade products	179
The brand name of the clothes I wear is important to me	149
● I try to buy environmentally friendly products	145
I am more likely to buy a HBA product if it is made of more natural ingredients	141
It is important to me what brand I buy	137
● I try to buy local product whenever I can	134
I have a pastime/hobby that is an important part of my life	128
I am willing to travel further to shop at the supermarket I prefer	128
If usual item is not available than I buy another size rather than change brands	126
I regularly take active exercise	121
I stick with a brand I usually buy than try something I am not very sure of	117
I/my partner enjoy cooking to entertain friends and family	116
I restrict how much sugary food I eat	114
The nutritional labeling on food & drink products has an effect on what I buy	113
I often treat myself/family to a meal out	112
My diet is very important to me	111
I think I will be doing more of my grocery shopping online in the future	111
I try to lead a healthy lifestyle	111

Till Roll Share indexed on All Shoppers – 52 w/e Jun 09 2013

[Search](#)[Groceries](#)[Entertaining](#)[Waitrose Direct](#)[Inspiration](#)[Recipes](#)[TV](#)[OFFERS](#)[Home](#) > [Inspiration](#) > [Food issues and policies](#) > [Origin of our food](#) > Sourcing British food

Inspiration

[Responsible sourcing](#)[Sourcing British food](#)[Palm oil](#)[HVOs](#)

Sourcing British food



All Waitrose fresh chicken, beef and pork (including that sold as sausages), bacon, duck and goose is British all year round.

British produce is among the best in the world

Waitrose always tries to source from Britain when products are in season and at the peak of freshness and flavour.

All Waitrose fresh chicken, beef and pork (including that sold as sausages) bacon, duck and goose is British all year round. All of our turkeys come from the UK or Ireland and we sell the best of British seasonal Lamb and Venison when in season.

We are proud of our British suppliers and forge strong relationships with them founded on trust, fairness and a passion for good food. With a reputation built on the quality and freshness of our food, we are committed to letting people know about the wealth of high quality food available.

Agriculture is an essential part of Britain's heritage

Waitrose believes retailers play a vital role in safeguarding the future of the countryside and the farmers who create it, and we take our responsibilities

[Save to Scrapbook](#)

Related links

- [British suppliers profiles](#)
- [Regional and local sourcing](#)





EVERYDAY ORGANIC

With our new Duchy Originals from Waitrose range, you can enjoy delicious, great quality food while helping to preserve our food heritage and support British Charities.

ORGANIC

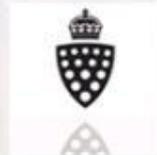


IS GOOD

DOES GOOD

TASTES GOOD

OUR GOOD FOOD CHARTER



Read about our commitment to sustainable food and farming.

[Learn More](#)

PROTECT & SUSTAIN



We aim to protect the environment whilst supporting charitable causes.

[Learn More](#)

GROW YOUR OWN



Buy our Organic Vegetable & Herb Seeds online and start your own kitchen garden.

[Learn More](#)

“*At Waitrose and Duchy, we share a belief in the value of British organic food, grown and produced sustainably. It's a pleasure we can all enjoy.*”

THE LATEST FROM DUCHY

[Duchy News](#) > [Home Farm Blog](#) >



INTRODUCING THE DUCHY ORIGINALS FROM WAITROSE MILK RANGE

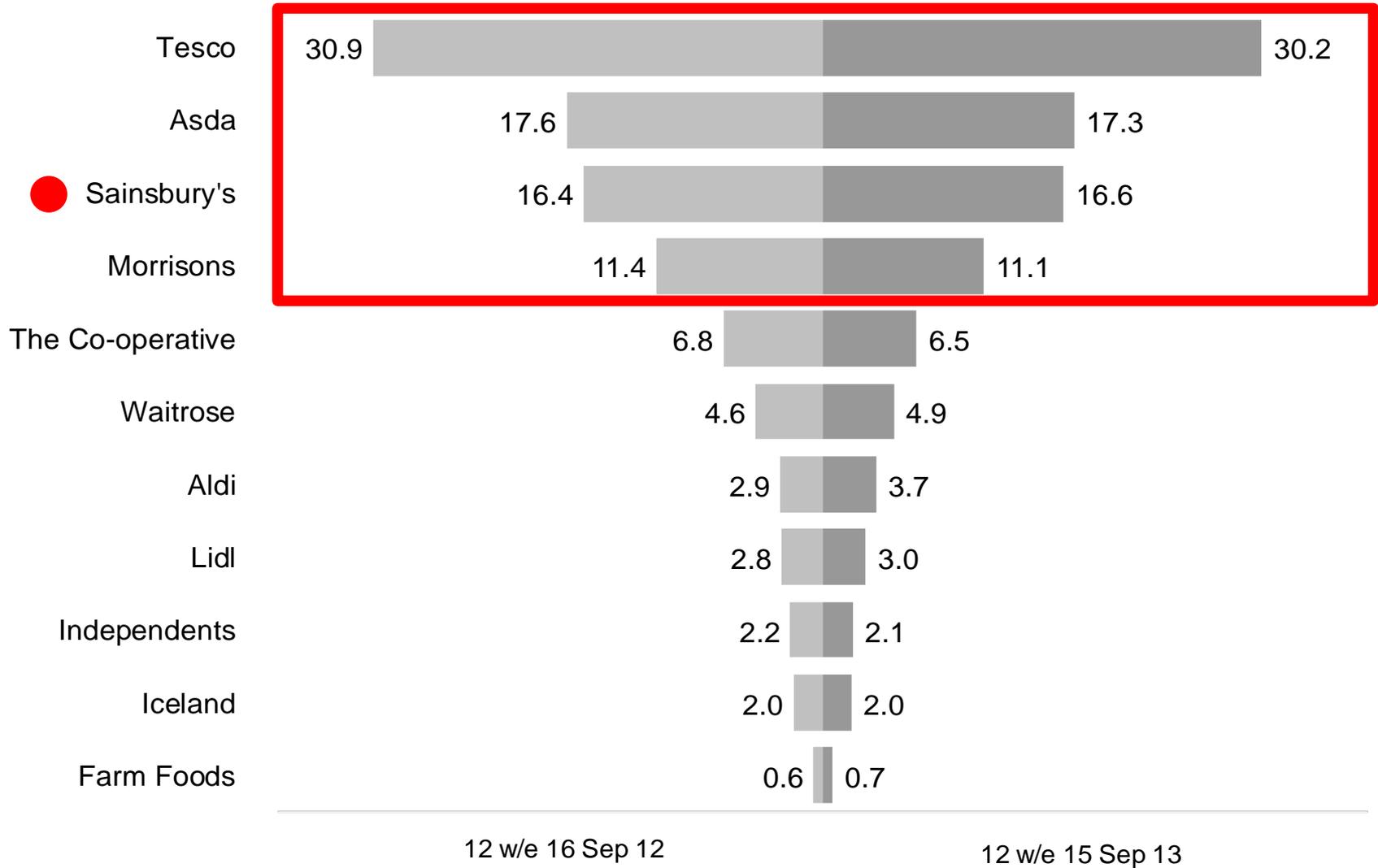
Posted in Organic Food by admin

The Agenda

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- A role for Ethical Claims



Latest Period Till Roll Totals - Share of Total Grocers



TESCO direct



DOUBLE CLUBCARD POINTS *

Groceries & Wine



UP TO 50% OFF SELECTED WINE AND CHAMPAGNE**

Entertainment & Digital



PRE-ORDER NOW
SEX AND THE CITY

Finance & Insurance



TESCO Compare

Phones & Broadband



Great New Range!

More Online Stores



triple clubcard points
www.tescodirect.com

BRITAIN'S BIGGEST DISCOUNTER IS NOW OPEN.

100s of discount brand products

100s of new price cuts



[Go to groceries ▶](#)

Offers:



Clubcard:



Health:



Community:



Environment:



Baby:



TESCO magazine

Store Locator

PRICE CHECK

Tesco direct >



Fresh food & groceries >



Clubcard >



Tesco Bank >



Fresh food & groceries

Let us do the hard work for you. Save time and money when you shop online.

Start shopping >

My account >

Book a delivery slot >

Favourites >

Every little helps >



Prices are dropping on your weekly shopping

Shop now



Clothing >



Wine by the case >



Music, films & games >



Phone Shop >



Together For Trees >



Facebook & Twitter >





When you shop at Tesco, we'll check your basket against the prices at Asda, Sainsbury's and Morrisons*. If your comparable grocery shopping would have been cheaper there, we'll give you a voucher for the difference (up to £10).

To qualify, you'll need at least 8 different items, including one comparable grocery item in your basket.



Shopped instore?



Shopped online?

Please type the numbers from the bottom of your receipt, then click 'Get my results'.

/ /
 :

Get my results

SUB-TOTAL	14.50
TOTAL SAVINGS	2.00
TOTAL	12.50
CASH	15.00
CHANGE DUE	2.50

15 10/12 13:56 1234 014 1031 2134

Meet the grower

Picking up a fresh punnet of strawberries is one of summer's little pleasures. But where do these pretty berries come from?



◀ ▶ 2/6



Ways to shop



Look out for this basket to buy recipe ingredients.

[Learn more >](#)



Every little helps

TESCO
Extra

Hello



ASDA

.....
SAVING YOU MONEY EVERY DAY
.....

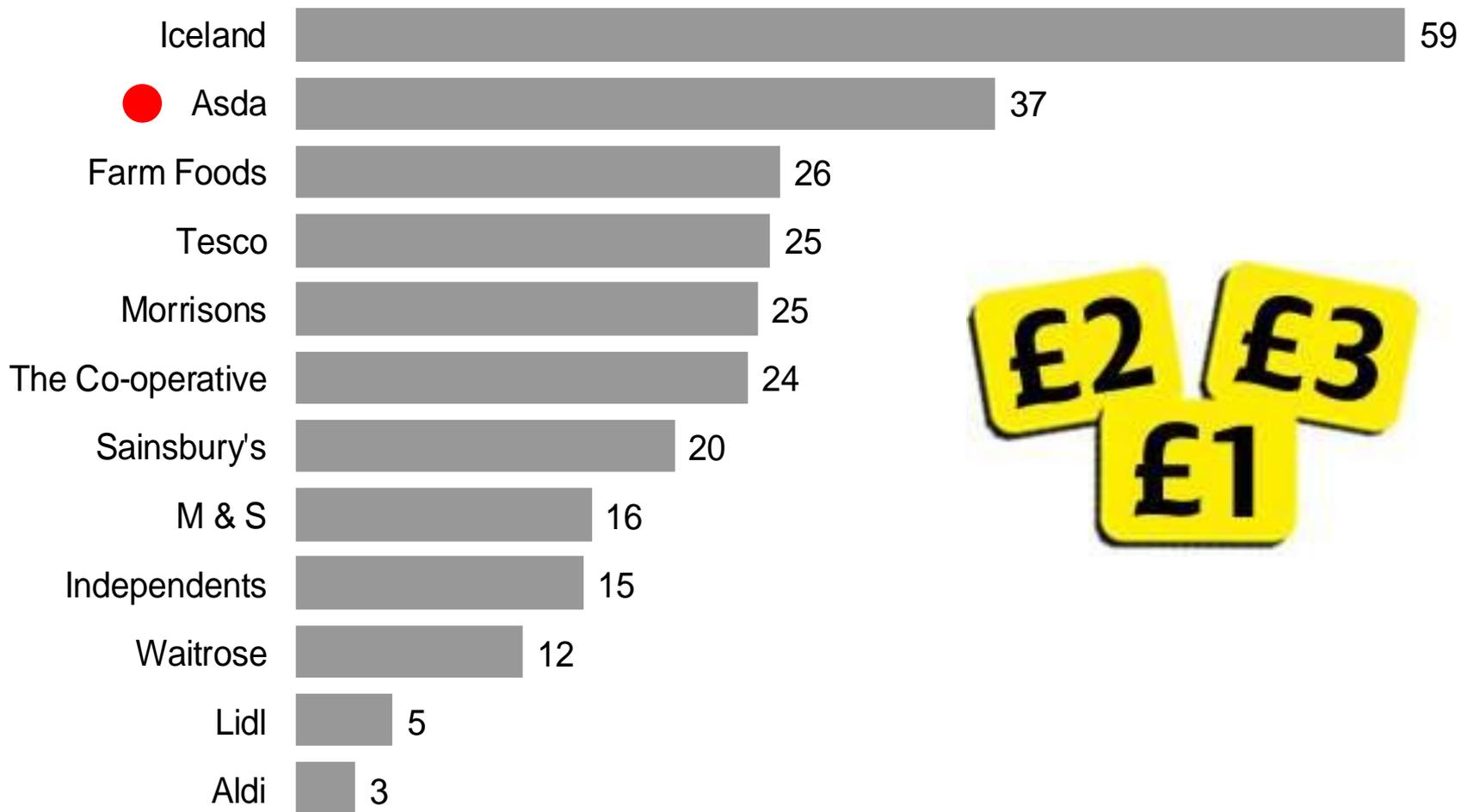


Lots of love for our £1 products

We've had a great response to our latest TV ad which showcases the thousands of fantastic products on sale at Asda for just £1 or less.



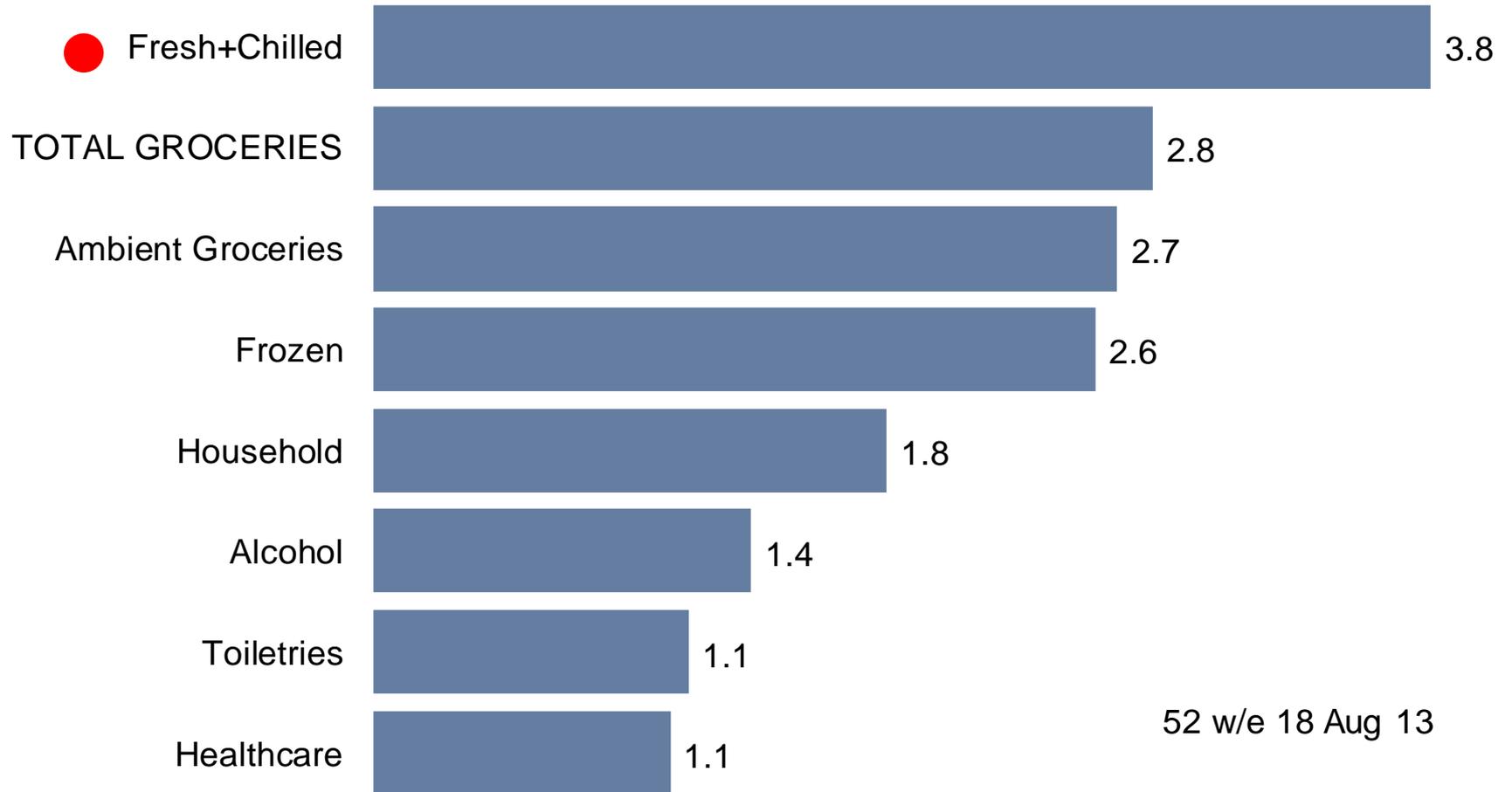
Grocery Share at Round Pound Prices £1/2/3/4 - £%



12 w/e 15 Sep 13

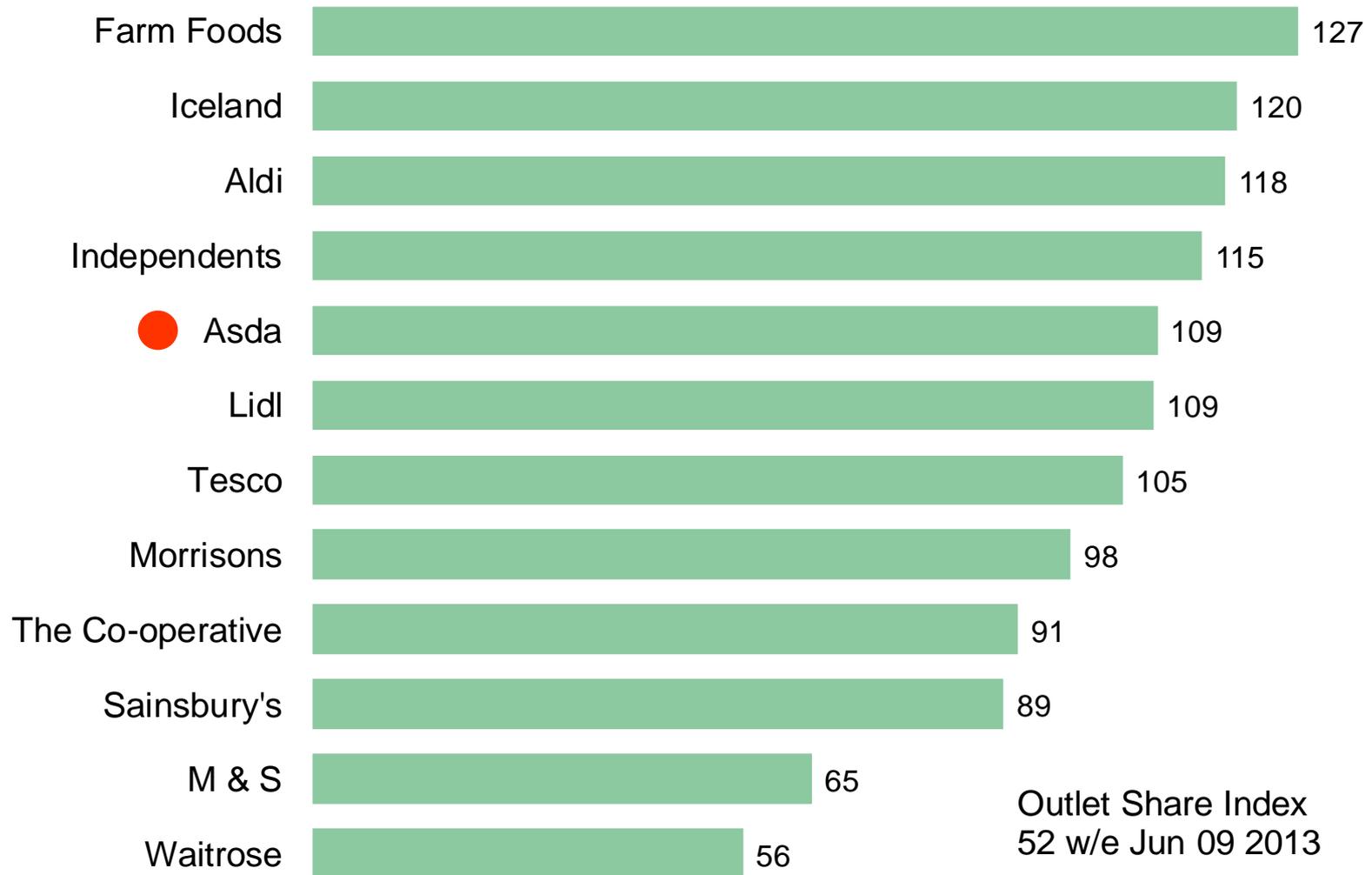
Year-on-Year Expenditure Trends - % change

Asda



52 w/e 18 Aug 13

I Consider That Price Is The Most Important Factor When Buying A Product



Ultimate Steak & Joules Ale Pie



TRIED, TASTED AND CHOSEN BY YOU

At Asda we are passionate about providing customers with quality food that tastes great.

We're proud to have won hundreds of own label food awards but it's you, the customers who are the best judges of food quality. That's why we've asked people up and down the country to try our Asda brand products.

[SHOP NOW](#)

Who is it chosen by?

Hundreds of thousands of blind taste tests have been carried out by an independent company. Products are blind tested by the public – that's Asda customers as well as customers of other major supermarkets. Products do not become part of the range unless they meet customers' high standards. That way whenever you see 'Chosen By You' you can be confident you are buying great tasting products every time you shop.

What Chosen By You products can I find?

Customers have tasted and approved over 9,000 Asda products from the [cakes](#) and [breads](#) in our bakeries to [soups](#), [pies](#) & [casseroles](#) in our [chilled food](#) ranges. We have also had the thumbs up from shoppers on hundreds of everyday family favourites such as [pizza](#), [frozen desserts](#), [frozen ready](#)



Sainsbury's

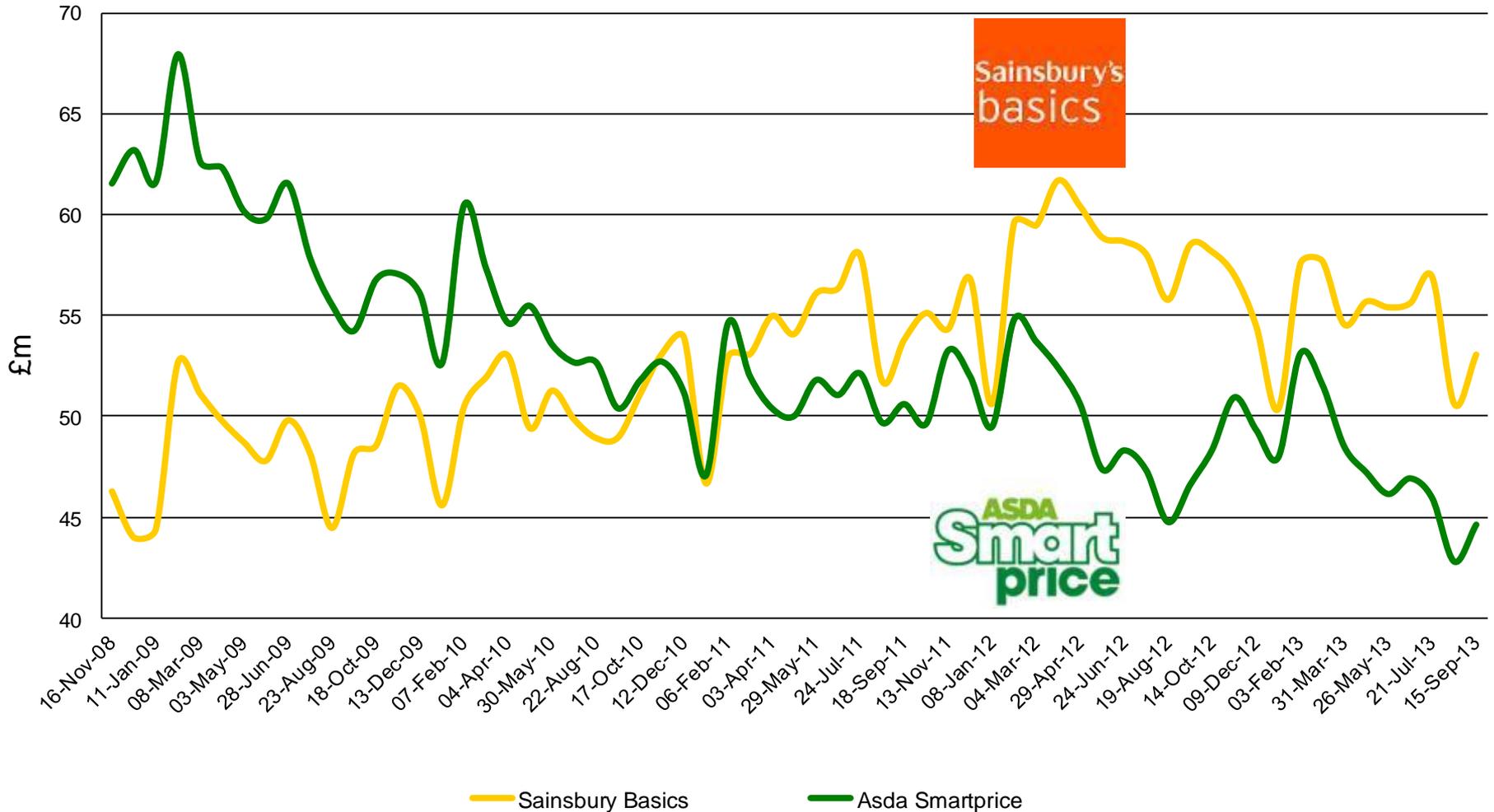
Balance



Value

Values

Basics v Smart Price - 4 weekly sales



Value

Values

Sainsbury Share Index

● I actively seek out fair trade products	135
● I am prepared to pay more for organic food	122
The nutritional labeling on food & drink products has an effect on what I buy	116
The brand name of the clothes I wear is important to me	112
It is important to me what brand I buy	111
My style is influenced by celebrities or people I see in TV or in magazines	111
● I try to buy environmentally friendly products	109
I regard myself as a connoisseur of food and wine	109
I am more likely to buy a HBA product if it is made of more natural ingredients	108
I am willing to travel further to shop at the supermarket I prefer	107
I regularly take active exercise	106
I/my partner enjoy cooking to entertain friends and family	106
I often treat myself/family to a meal out	106
If usual item is not available than I buy another size rather than change brands	105
I try to lead a healthy lifestyle	105
● I try to buy local product whenever I can	105
I stick with a brand I usually buy than try something I am not very sure of	105
My diet is very important to me	104
I make a shopping list before I go out and stick to it	104
I have a pastime/hobby that is an important part of my life	104

Till Roll Share indexed on All Shoppers – 52 w/e Jun 09 2013



Sainsbury's

[Recipes & Inspiration](#)[Meal Planning](#)[Occasions](#)[Brand Match](#)[Products & Values](#)[Shop Online](#)

› Brand Match

Save at Sainsbury's with Brand Match

When you shop instore with us you'll never pay more for brands than at Asda or Tesco. It's simple.



Tesco



Sainsbury's



Asda

Introducing Brand Match

Spend £20 or more, with at least one branded product in your basket, and we'll work out any difference in the price compared with Asda and Tesco. If the same branded items could have been bought for less, we'll give you a coupon* for the difference.

[▶ Watch demo](#)



MORRISONS



We freshly prepare food
in store every day



Our suppliers

- Egg tracker
- Taste of the season
- Fresh off the press
- Find a supplier
- Explore our produce
- Inside story: Autumn
- The Morrisons Farm at Dumfries House**

Quick recipe Search

Search for a recipe to plan your perfect menu..

[Advanced search >](#)

Quick Wine Chooser

Which colour do you like?

Got a price in mind?

How do you like it?

The Morrisons Farm at Dumfries House



At Morrisons, we are passionate about fresh food and the brilliant British farmers who supply us with it. That's why we now have our very own farm in Scotland – The Morrisons Farm at Dumfries House – and are rolling out a UK-wide farm research programme aimed at helping to build a sustainable British farming industry.

By farming ourselves, we will get an even better idea of the challenges that face farmers and we hope the lessons we learn will benefit not only our suppliers, but many other farmers in Scotland and the rest of the UK. In the future we plan to open The Morrisons Farm at Dumfries House to visits from schools taking part in **Let's Grow**, so kids can see for themselves where their food comes from.



The latest news

The Morrisons Farm at Dumfries House has undergone a major transformation over the summer months. We've built a new cattle shed to allow us to increase the size of our

Newsletter

Sign up to My Morrisons Newsletter

Receive the latest offers & competitions as well as being able to save recipes, wines and guides.

Recipe search

Browse through our recipes to plan your perfect menu.

[Detailed search >](#)

WINNER



Fresh Produce Retailer of the Year



[Find your nearest store >](#)

Market Street

Butcher

- [Fishmonger](#)
- [Bakery](#)
- [Cake Shop](#)
- [Greengrocer](#)
- [Deli](#)
- [Oven Fresh](#)
- [Fresh to go](#)
- [Flowershop](#)
- [Café](#)
- [New TV ads](#)

Quick recipe Search

Search for a recipe to plan your perfect menu.

[Advanced search >](#)

Butcher



Our Academy trained butchers will prepare your 100% British meat just the way you like it. They can also offer advice on how to get the most out of your meat, and even suggest alternative cuts that you may not have tried. We're always happy to help, so take a look at what we can offer and be sure to visit your local Market Street butcher in store.

Behind our counters...

From sirloin steaks to pork chops we check over every cut to ensure you get quality fresh meat every time. We also prepare all our 100% British meat in store, all you have to do is tell us how you like it!

Newsletter

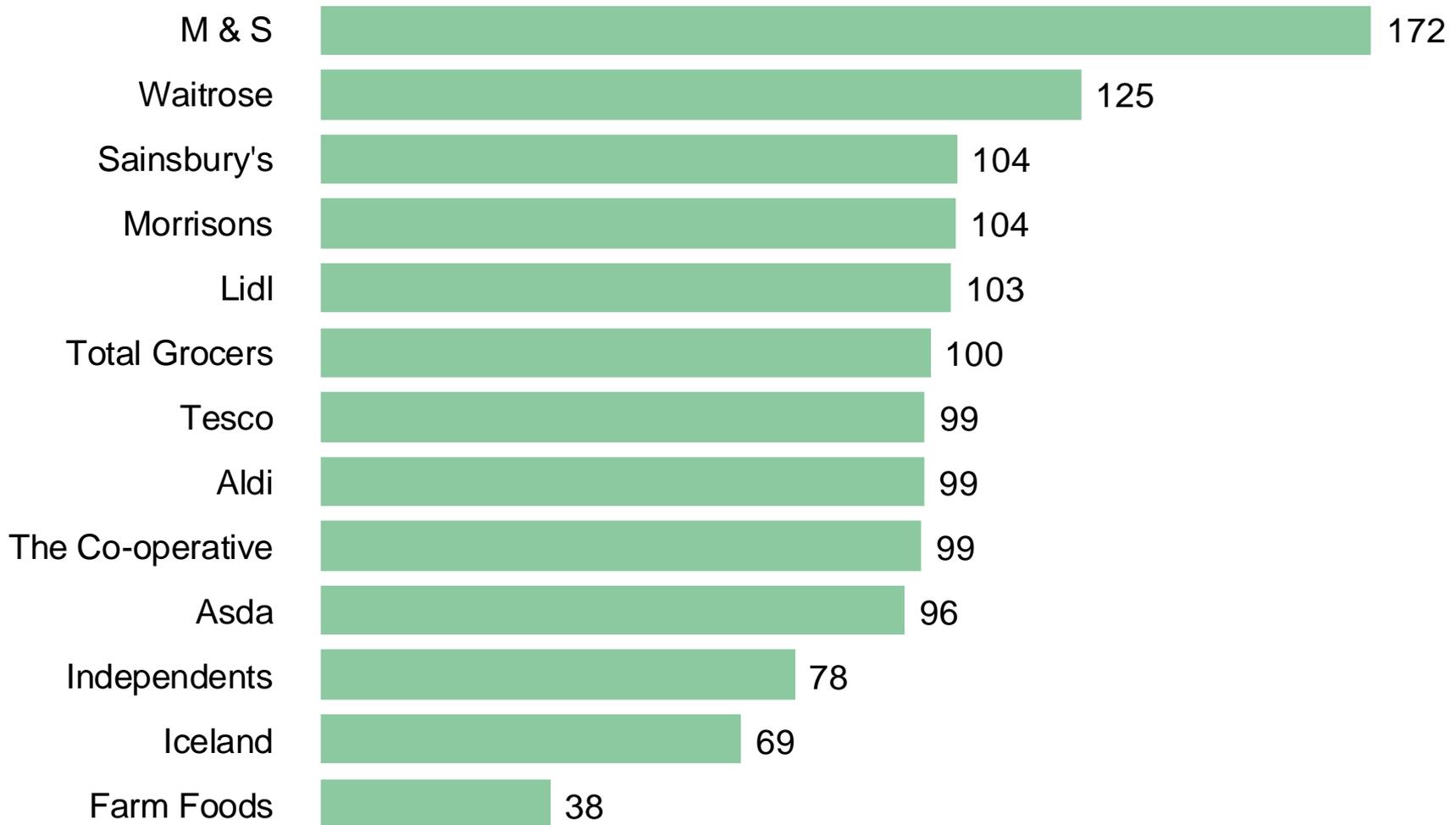
Sign up to Morrisons Newsletter

Be the first to hear about Morrisons competitions, offers and latest news, by signing up to our monthly Newsletter.

Market Sectors indexed on Total Groceries

● Fresh Fish	125
● Chilled Bakery Products	123
● Fresh Meat	117
Canned Goods	112
● Chilled Convenience	109
Hot Beverages	106
● Ambient Bakery Products	104
Pet Care	104
● Fruit+Veg+Salads	104
Biscuits	103

Fresh + Chilled Trading Indices - 52 w/e Aug 18 2013

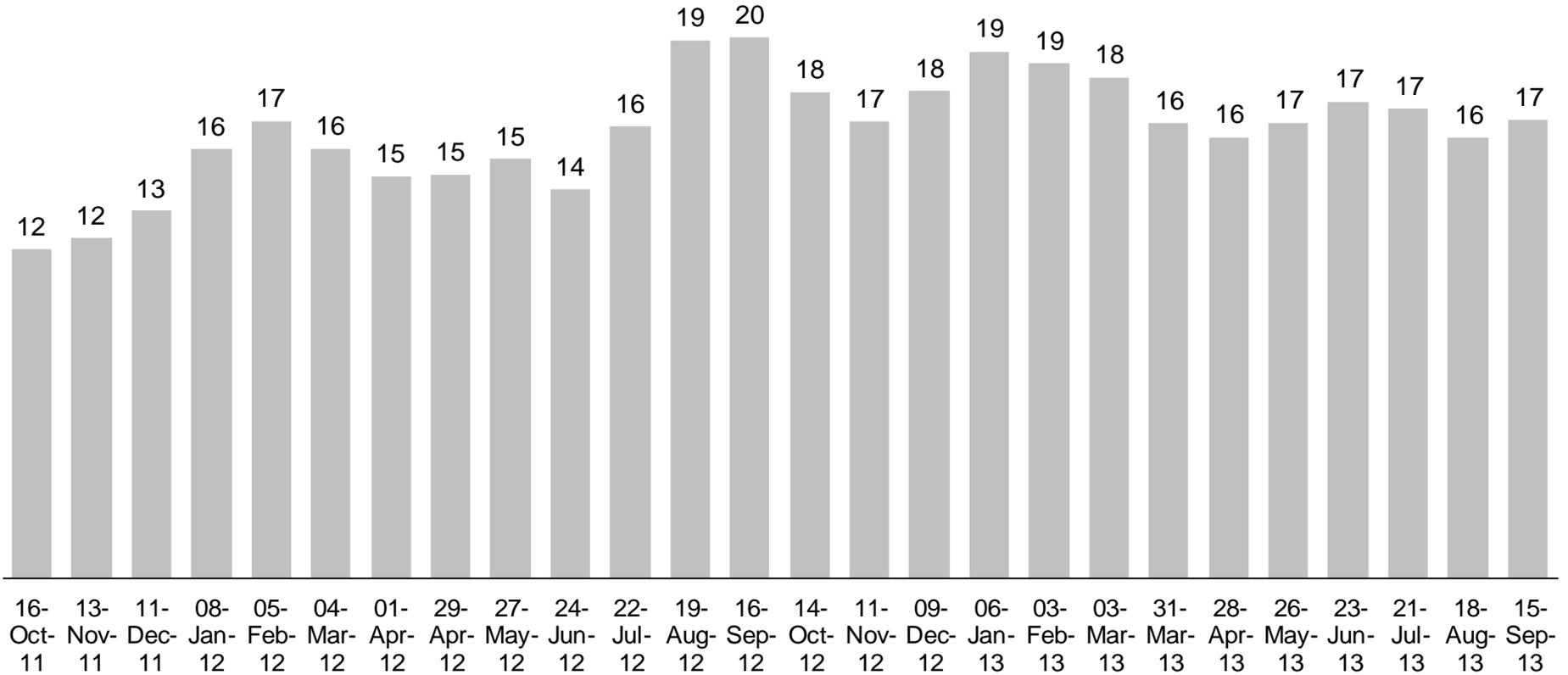


The Agenda

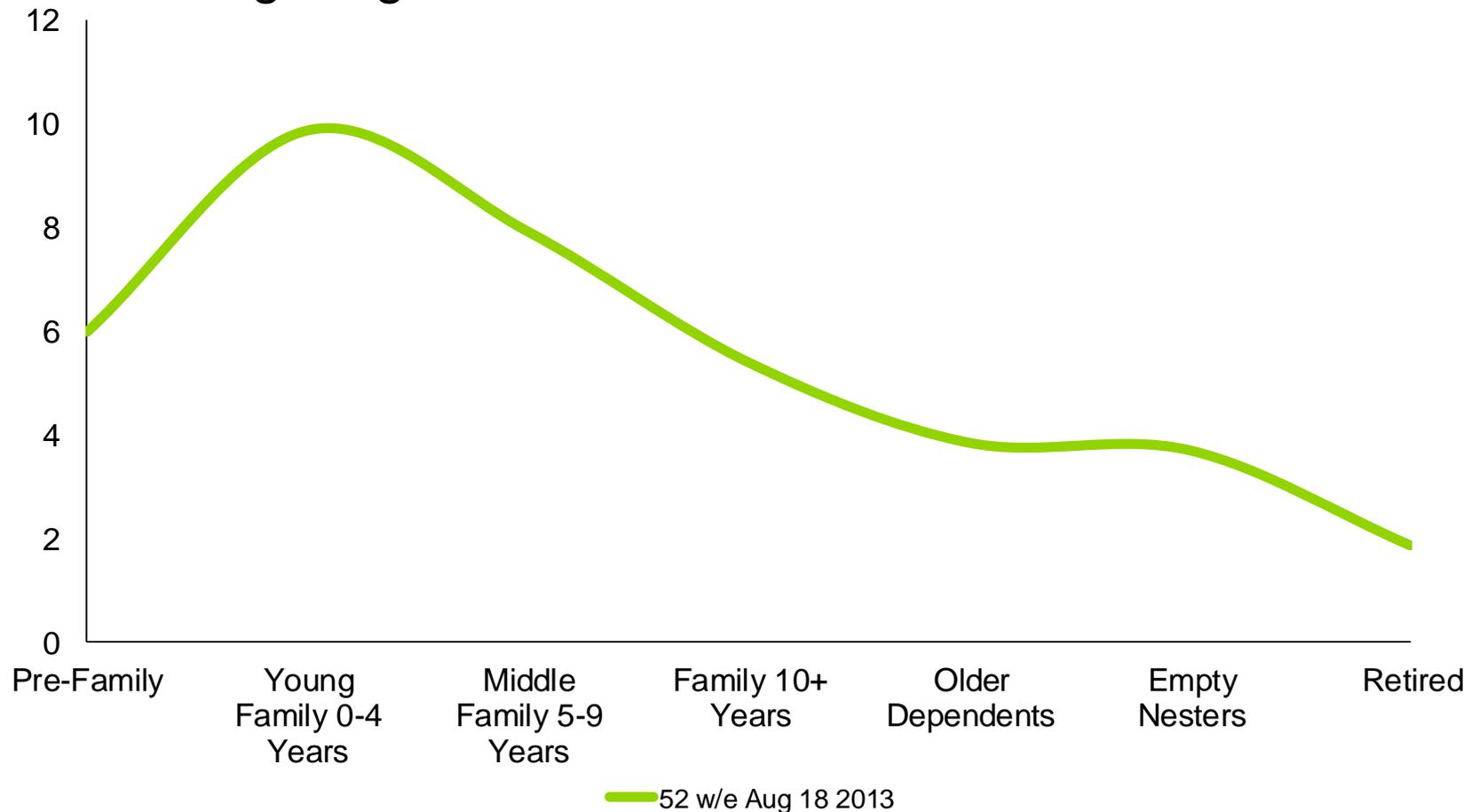
- Austerity
- Niches
- The Big 4
- Home Delivery
- Seeking Differentiation
- A role for Ethical Claims



Total Internet Grocery - Rolling 12 w/e growth



Total Grocery Internet Lifestage Signatures

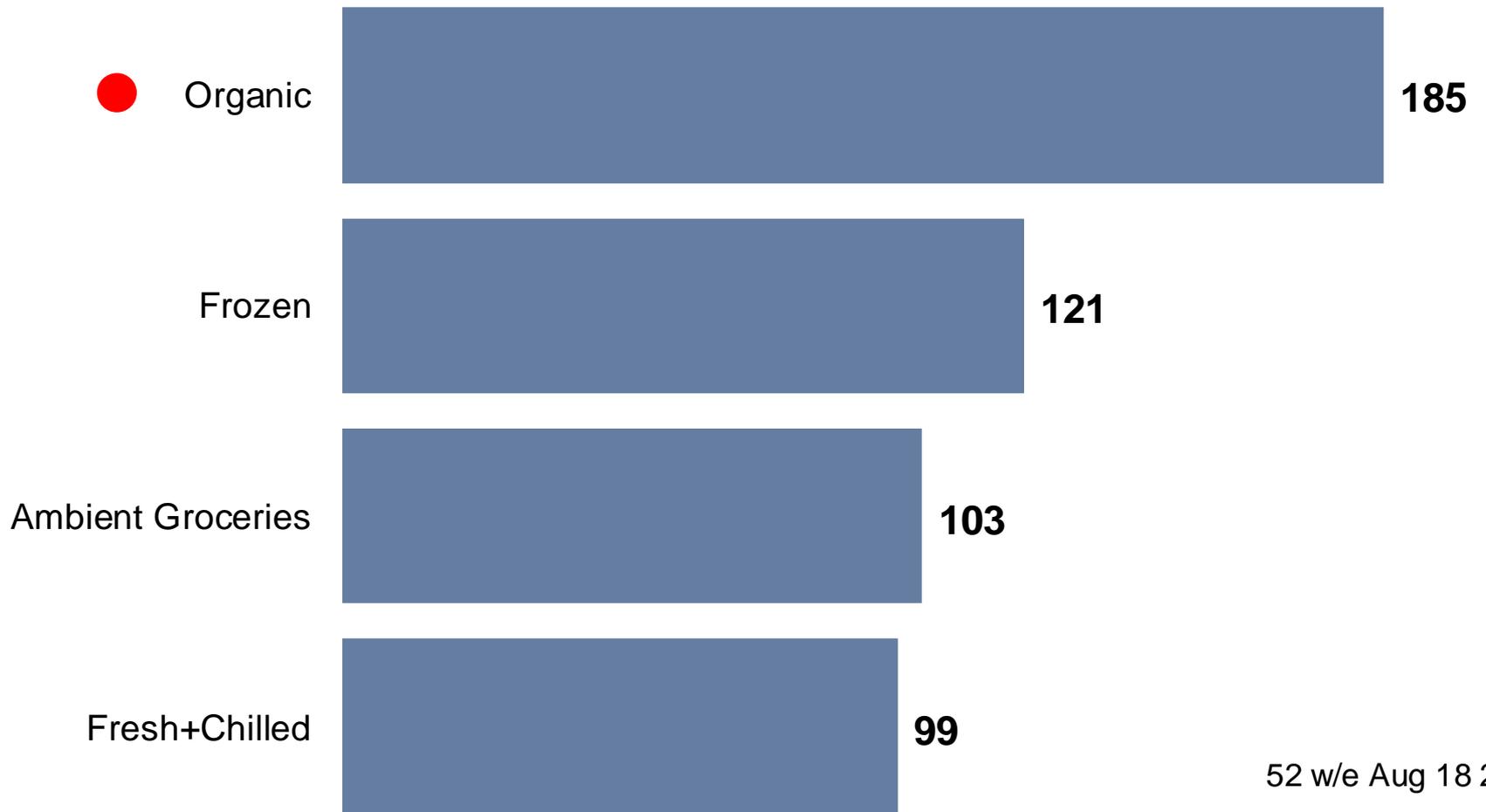


Total Grocery Internet Household Income Signatures



Trading Index

Internet Delivery



52 w/e Aug 18 2013

Chilled / Fresh



Frozen

BREAD & BAGELS

BREAKFAST

Just Jammed
with
99¢

Chilled / Fresh



Frozen



The Agenda

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Fresh Market

pizza, pasta & garlic bread

butchers

fishmongers

bakery





Dill
Parsley
Coriander
Sage
Thyme
Dried herbs

Living herbs
Coriander

Living herbs

Living herbs

£1.00

£1.00

£2.30



£1

LOCAL PRODUCE REMAINS

CITY KITCHEN

Go with the flow

ATTENTION

Beetroot

Great Harvest
Home of Stumpet Potatoes

1.50

1.00

Enjoy the taste of East Anglia

Meet the Farmer



Le chou broc
ESPAGNE

La bette Paquet
FRANCE

Le carbon d'Espagne
ESPAGNE

La bette pied
ITALIE

La bette pied
ITALIE

La bette pied
ITALIE

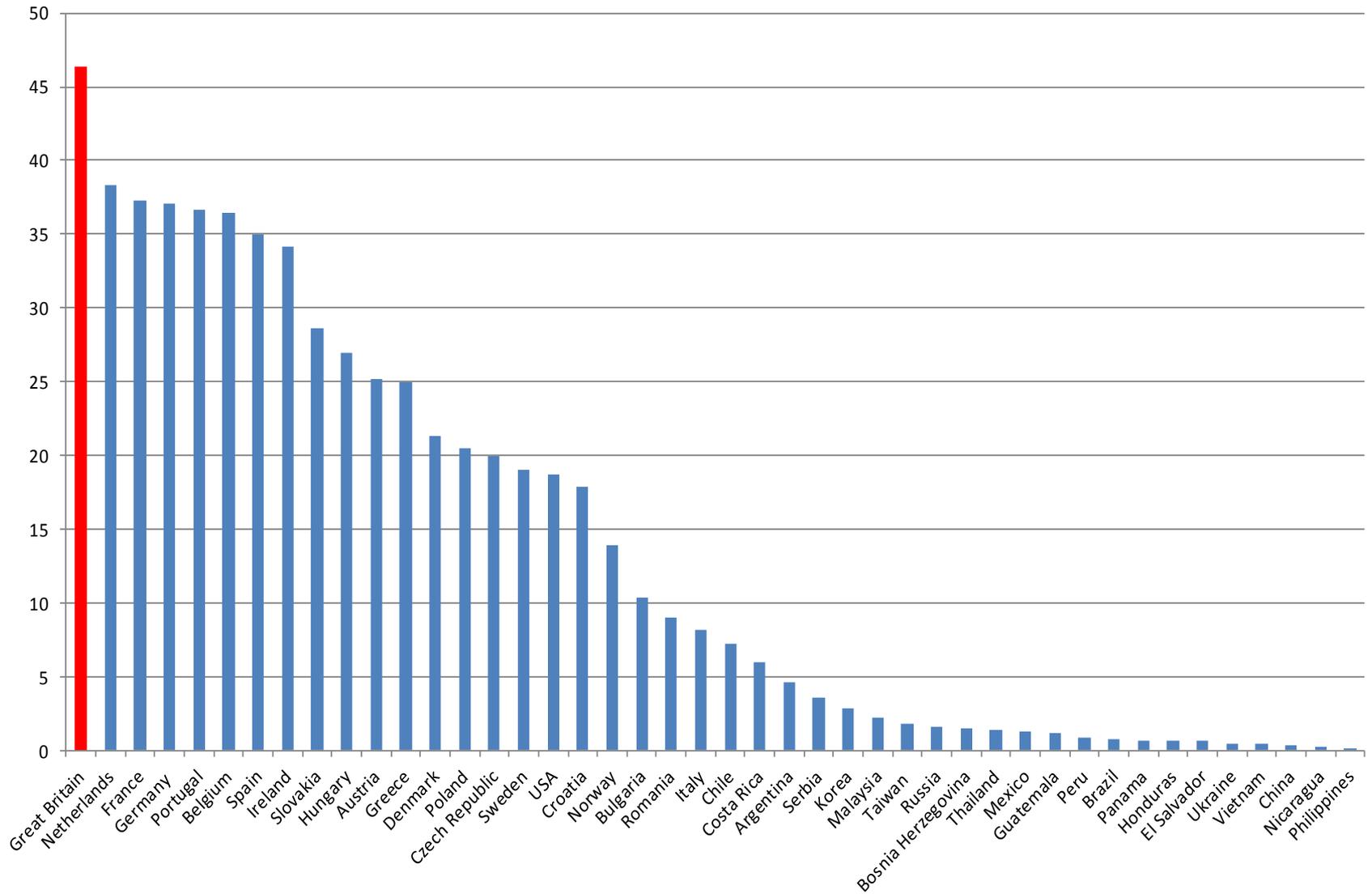
PRODUCTIONS FRANÇAISES

Épicerie
D'ICI ET D'AILLEURS

The Branding of Own-Brand



Private Label 2011(%)



TESCO Finest
ASSAM

This strong black blend comes from the tea plantations of North East India's Brahmaputra Valley. It's rich with a deep amber colour and a full bodied, malty taste.

100 TEA BAGS

SEWING SUGGESTION

TESCO Finest
CHARGILLED VEGETABLE COUSCOUS

KEEP REFRIGERATED

ASDA
Extra Special

Hand Finished Coffee Cake

no artificial colours, flavours or preservatives
Suitable for vegetarians

Style: (int) Bed: (int)

ASDA
Extra Special

Creamy Mash
Made with double cream, butter and a little sea salt

no artificial colours, flavours or preservatives
Suitable for vegetarians

430g
Serves 2

Style: (int) Bed: (int)

Keep refrigerated

EARL GREY DECAFFEINATED FAIRTRADE FINE TEA
50 TEA BAGS

Sainsbury's
Taste the Difference

TASTE TESTED BY CUSTOMERS

FAIRTRADE

Sainsbury's
Taste the Difference

QUICHE LORRAINE WITH MAPLE CURED BRITISH SMOKED BACON

TASTE TESTED BY CUSTOMERS

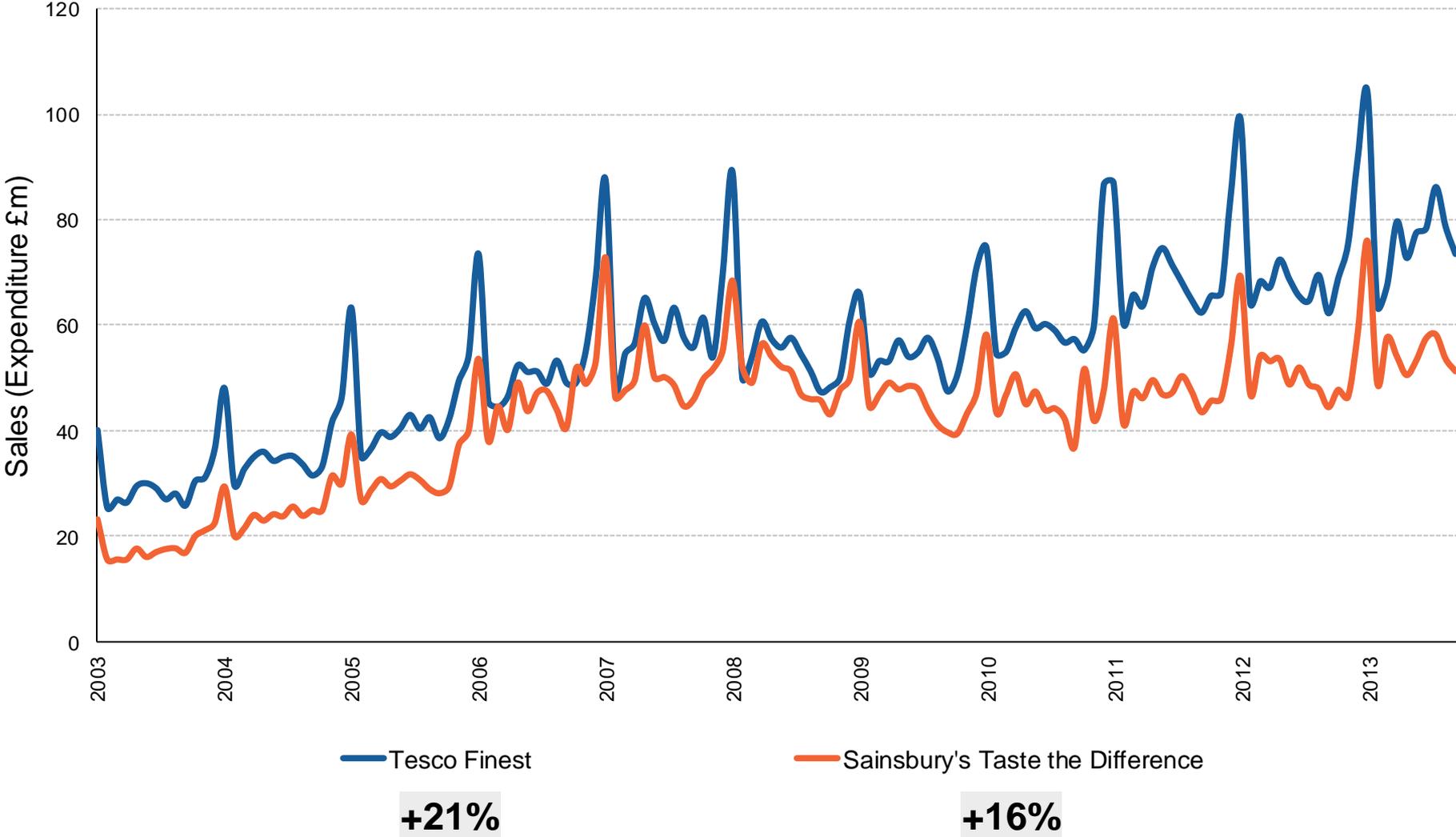
UK PRODUCE
POKE

100% of it's British

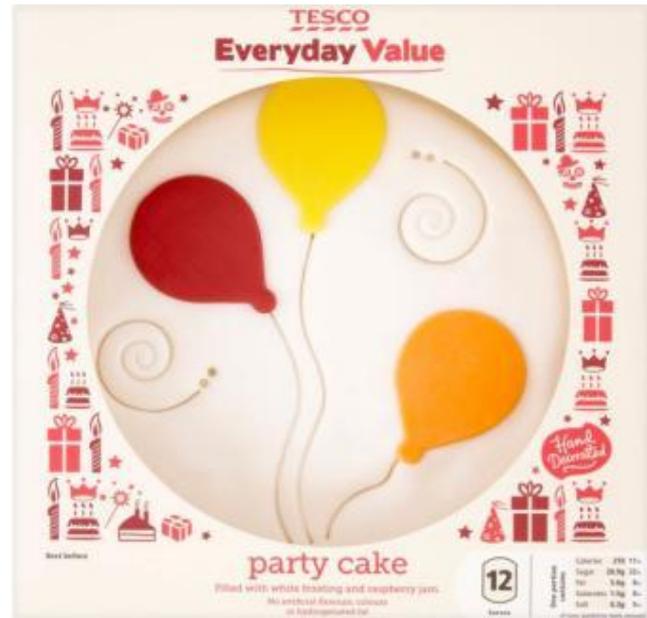
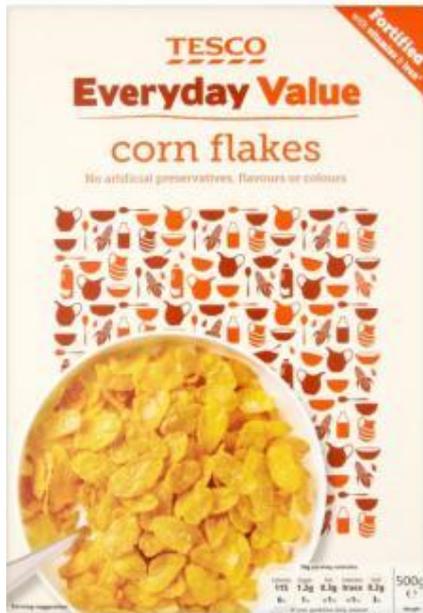
Keep refrigerated
Ready to eat
Display until 12:00

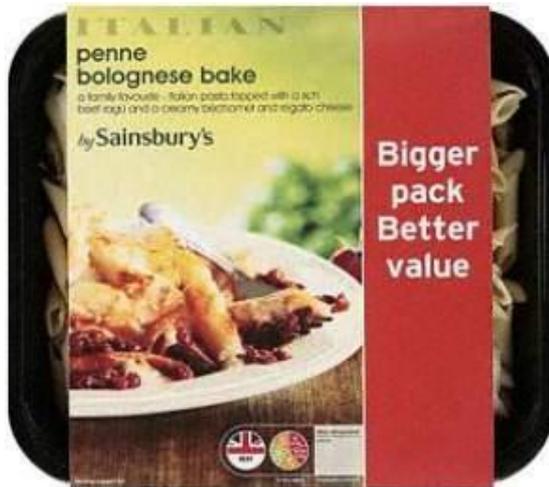
Premium Own-Label Sales Trends

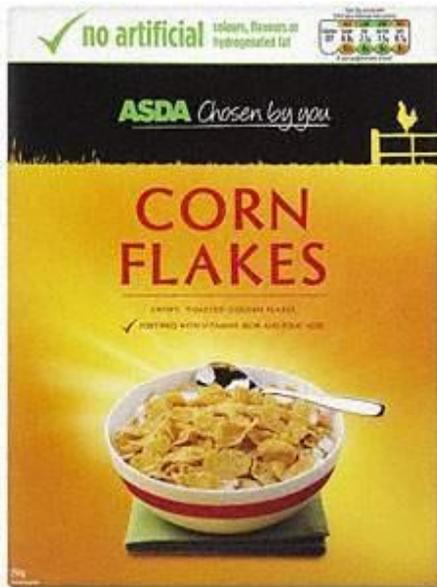
Latest 12-wk % Change











ASDA Smart price

Fish Pie

Serves 1
No hydrogenated fat

NO ARTIFICIAL colours or Flavours



Each 100g pack contains

	ENERG	PROT	FAT	SAT FAT	SALT
Calories	247	3.6g	7.2g	4.5g	1.3g
	4%	7%	14%	9%	26%

of your guideline daily intake.

300g Serving Suggestion

Freezable

NO NUTS

Not vegetarian

ASDA Smart price

Raspberry Sponge

No hydrogenated fat

NO ARTIFICIAL colours or Flavours



Each 100g sponge contains

	ENERG	PROT	FAT	SAT FAT	SALT
Calories	155	14.5g	4.0g	1.1g	0.2g
	3%	28%	8%	2%	3%

of your guideline daily intake.

200g Serving Suggestion

Contains Vegetables

Not for Diets

ASDA Smart price

30 Dishwasher Tablets





ASDA Smart price

Lasagne Sheets

NO PRE COOKING REQUIRED



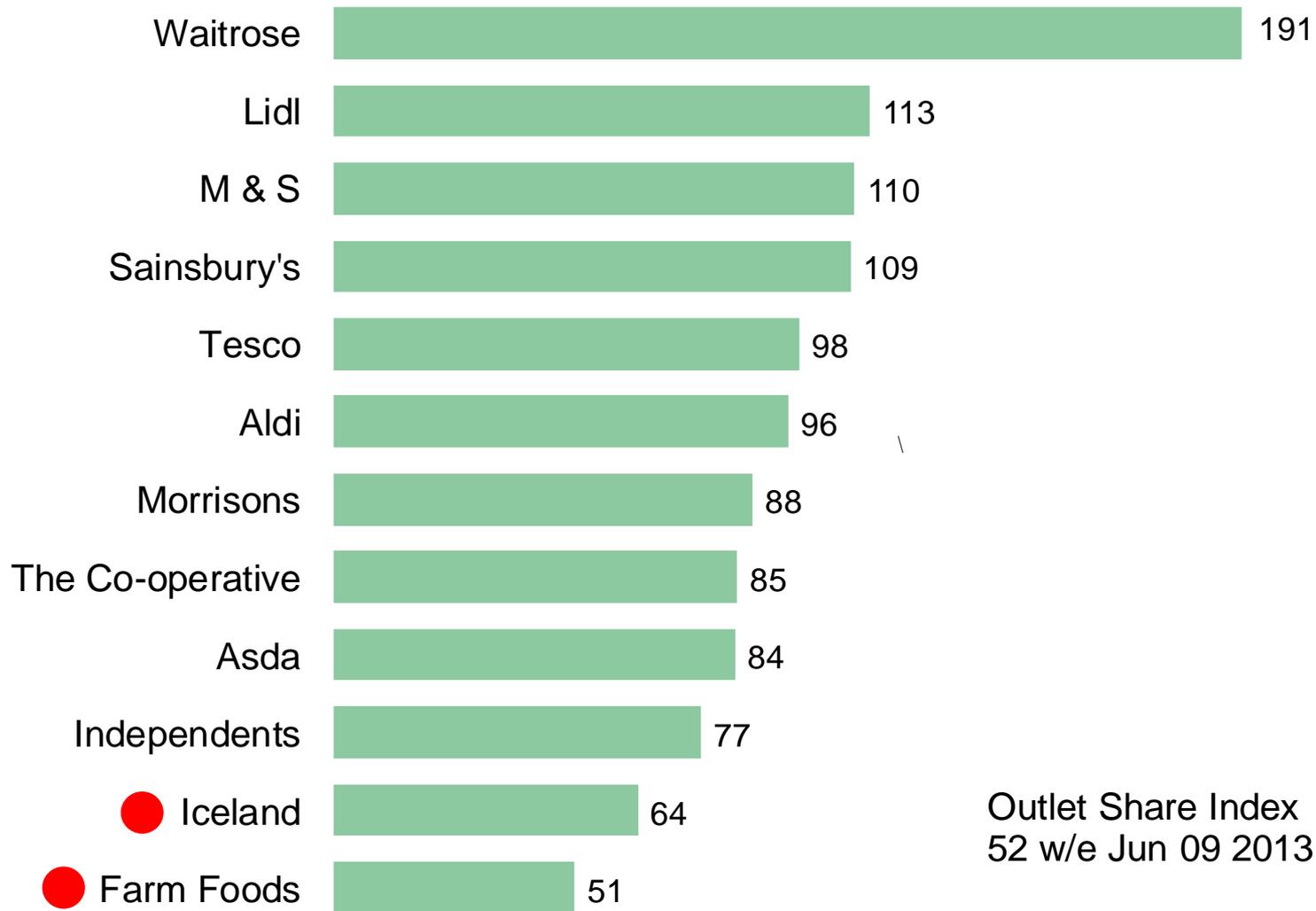
250g Serving Suggestion

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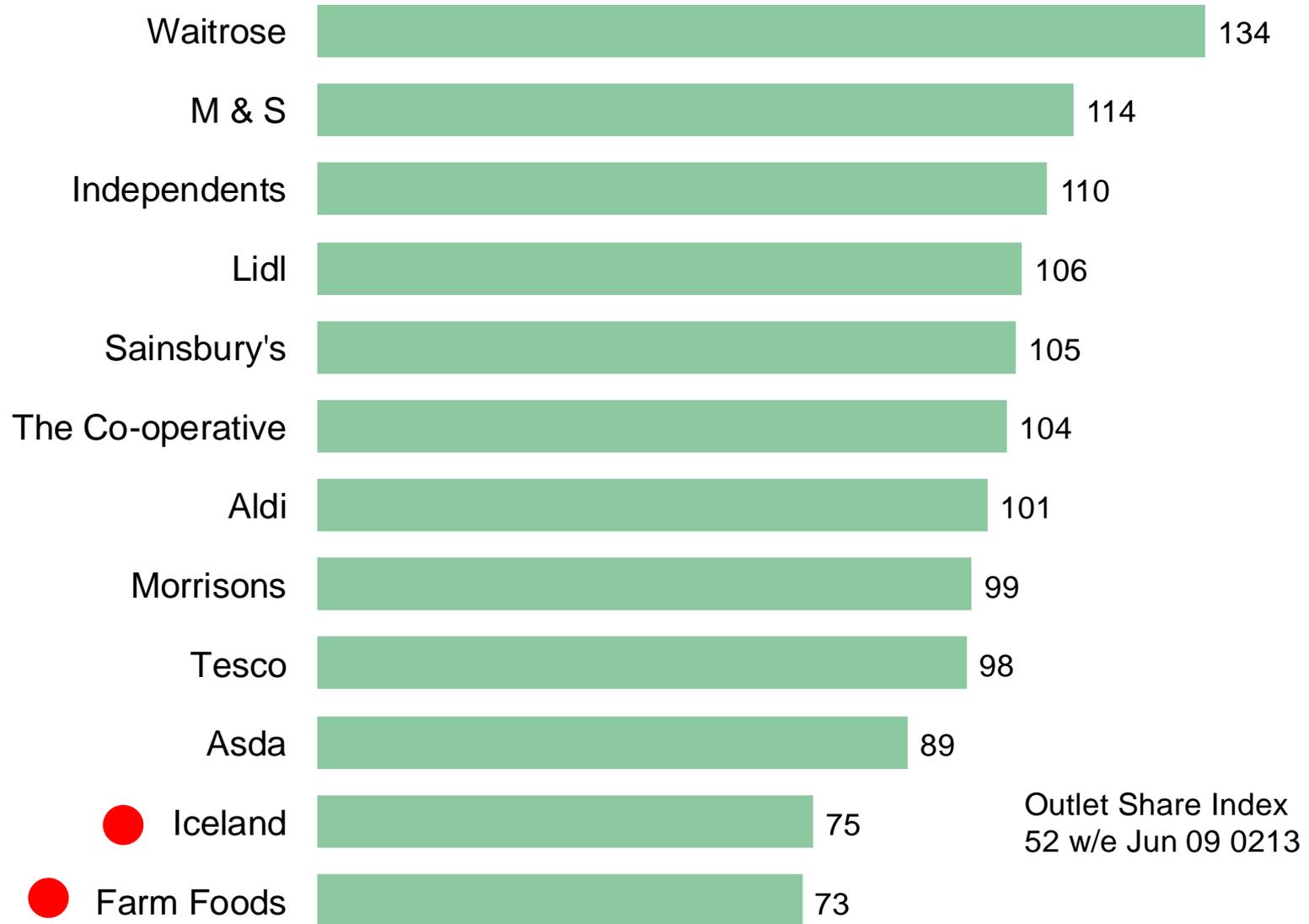


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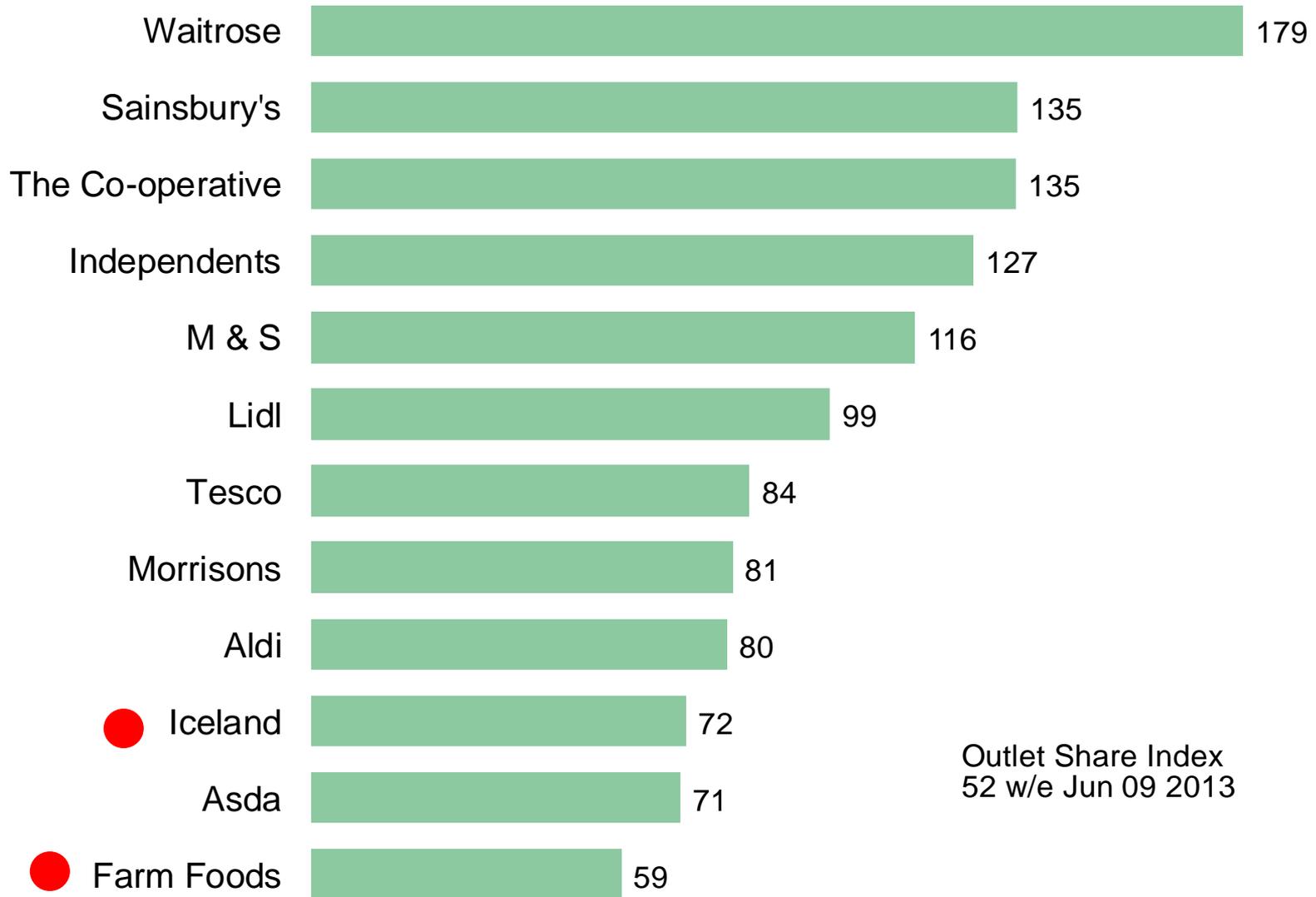


Outlet Share Index
52 w/e Jun 09 2013

I try to buy local product whenever I can

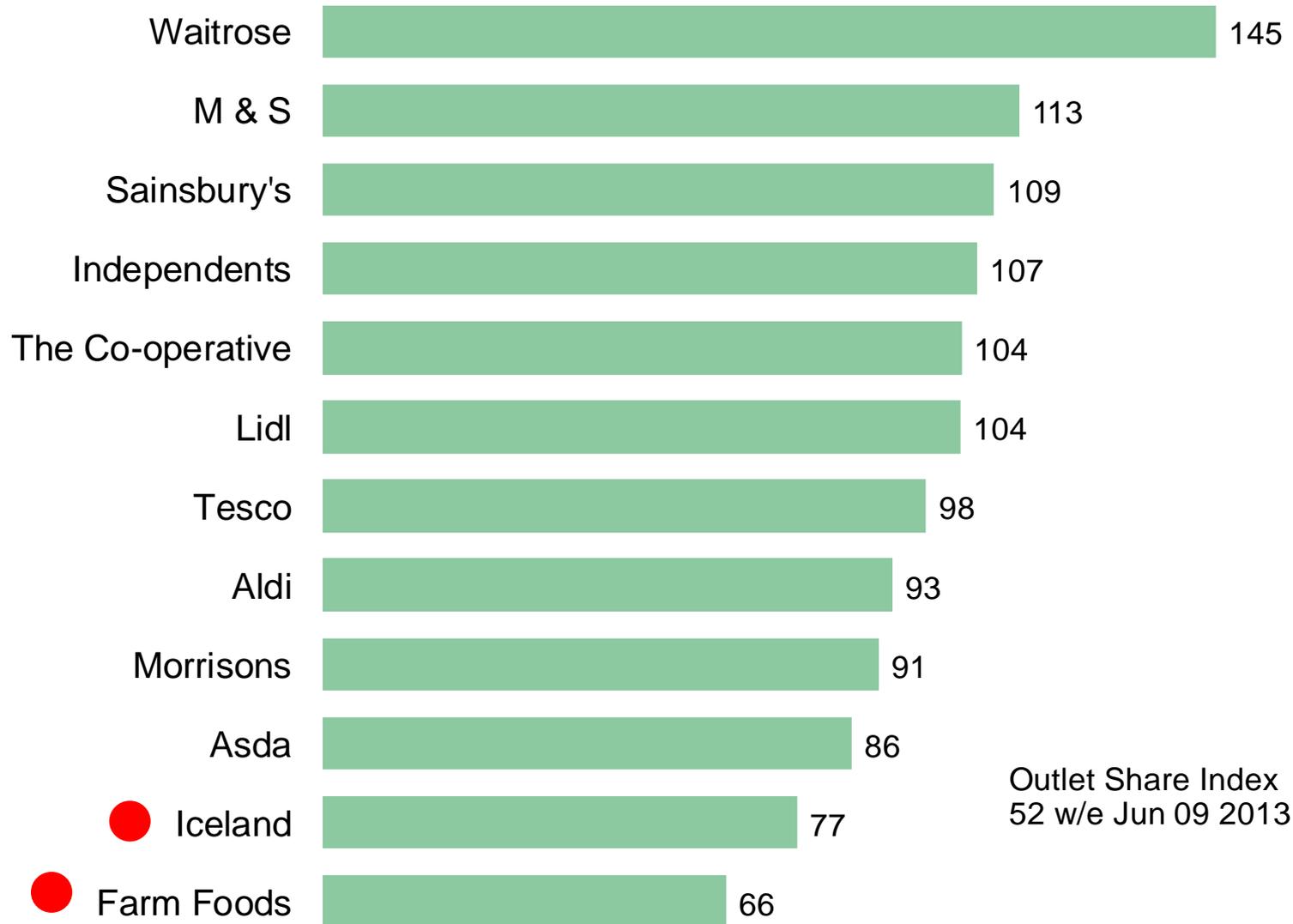


I actively seek out fair trade products

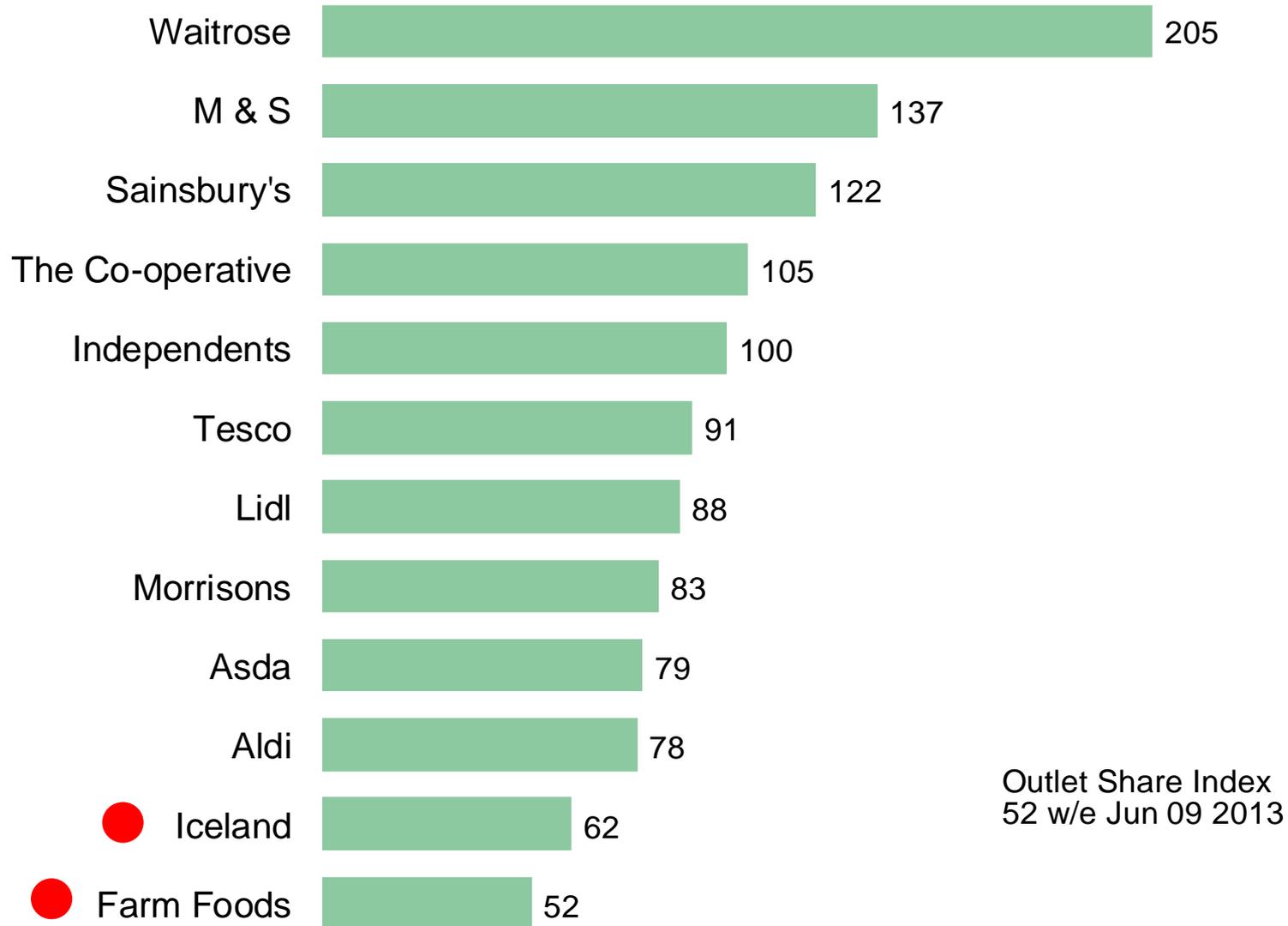


Outlet Share Index
52 w/e Jun 09 2013

I try to buy environmentally friendly products



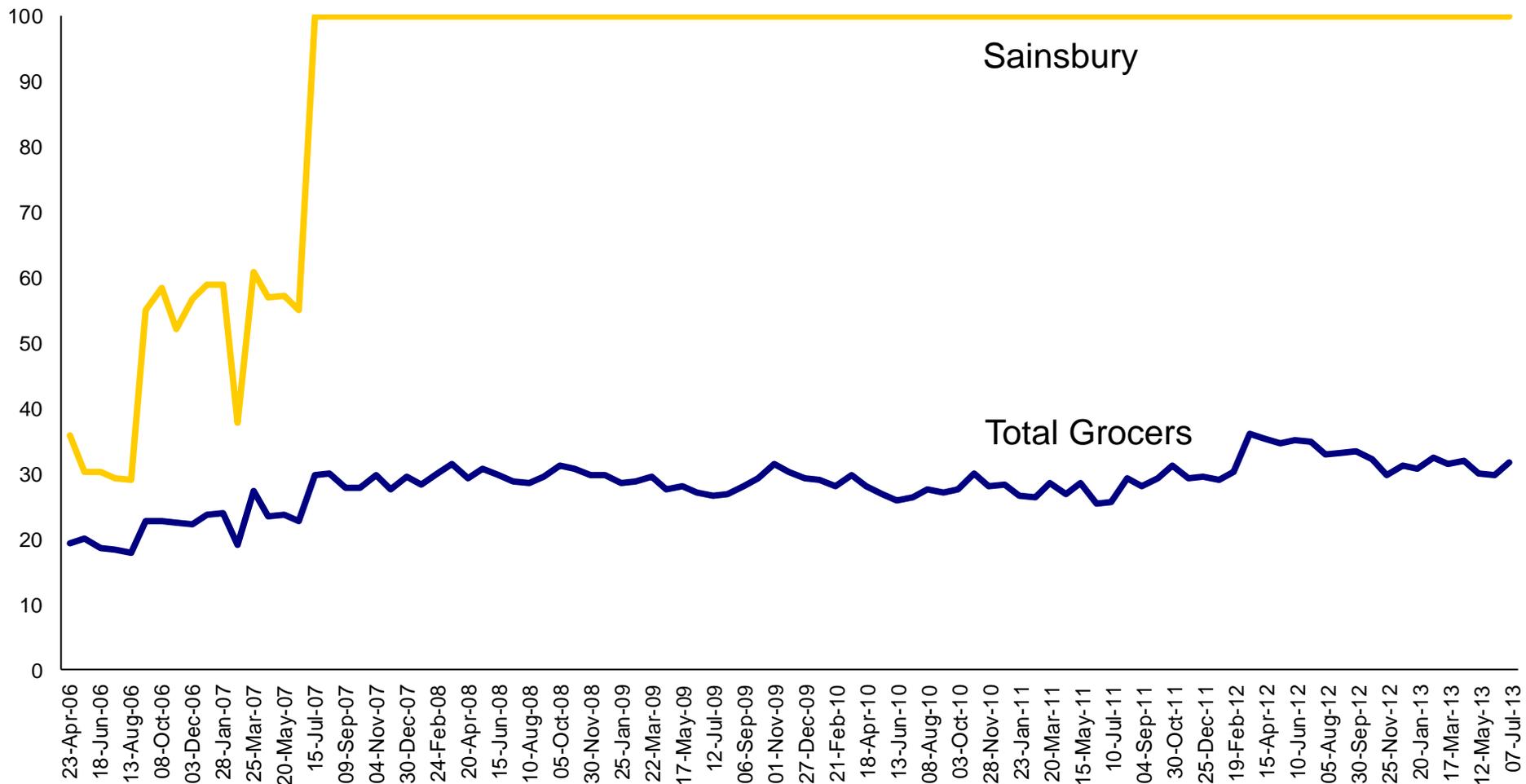
I Am Prepared To Pay More For Organic Food



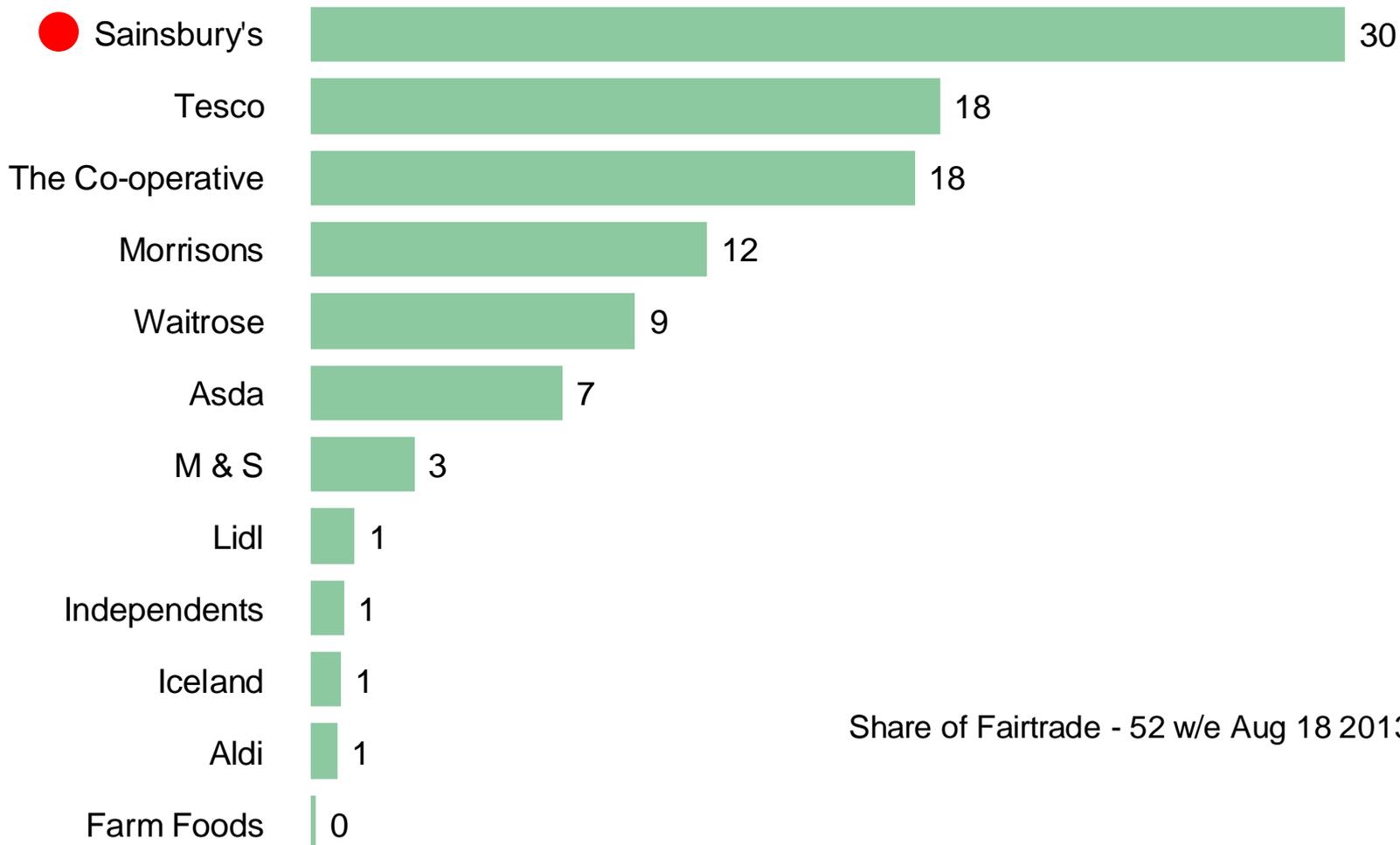
KANTAR WORLD PANEL High definition inspiration



Fairtrade Prepacked Bananas Market Share



Fairtrade Shares

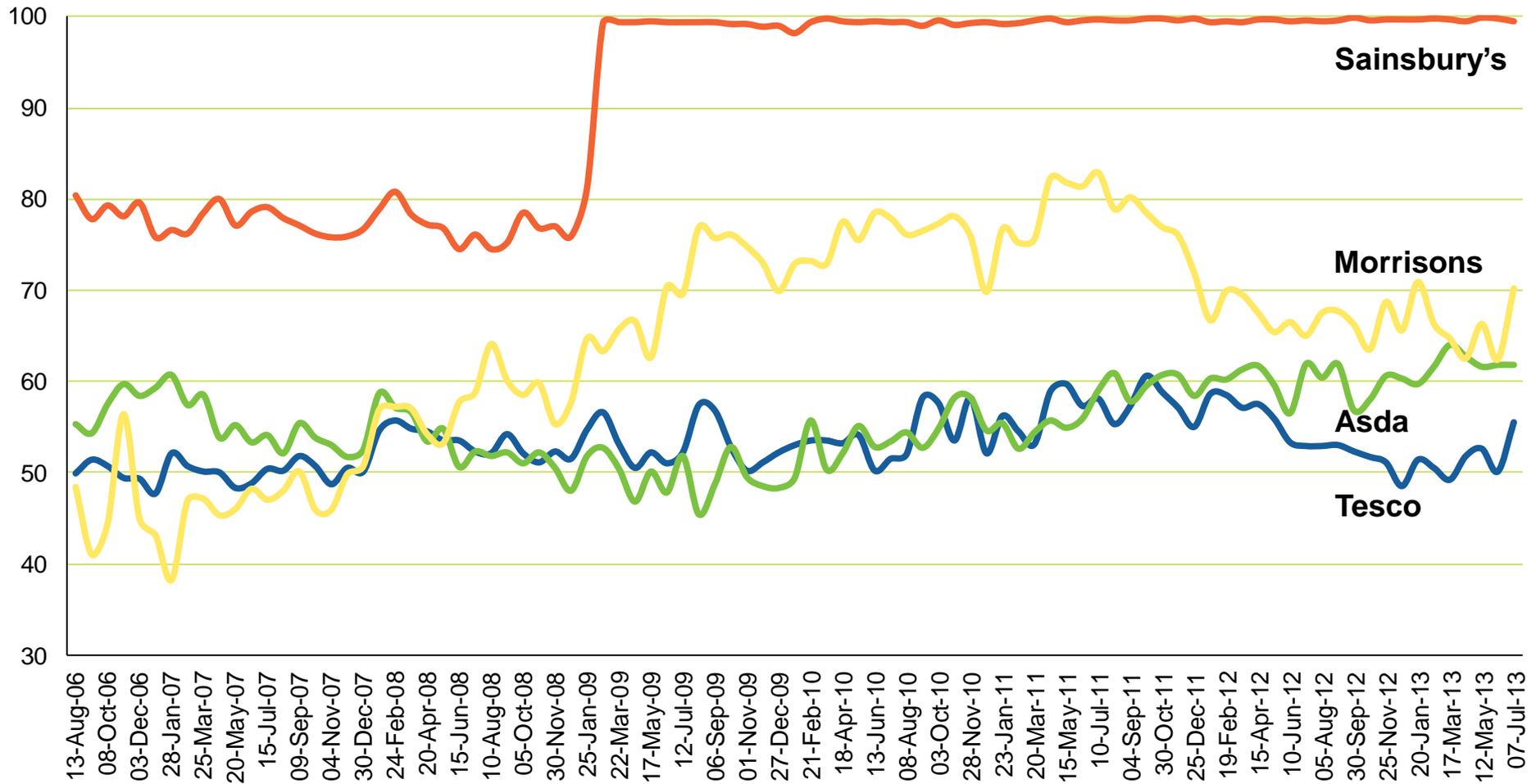


Share of Fairtrade - 52 w/e Aug 18 2013

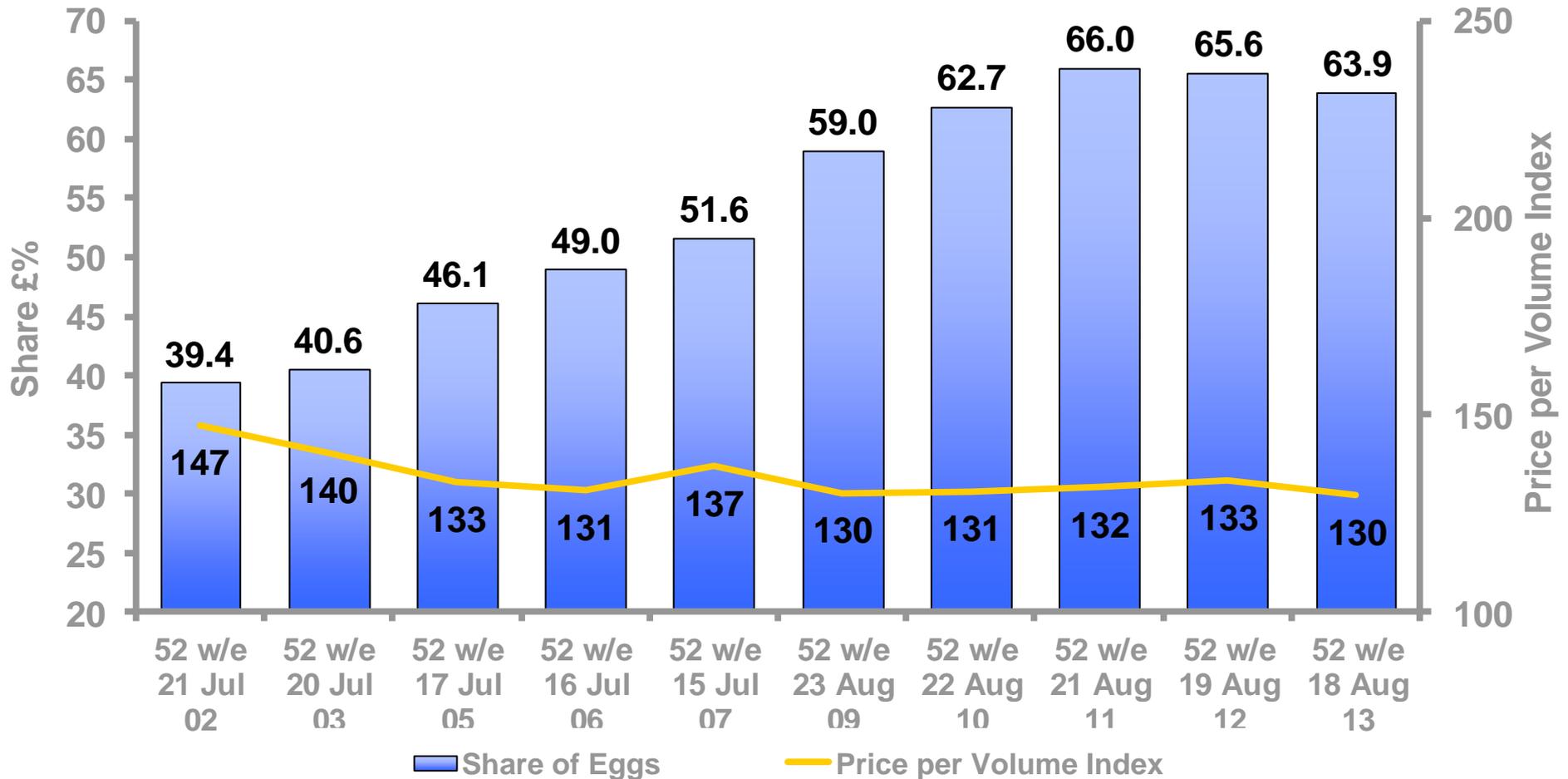
Eggs



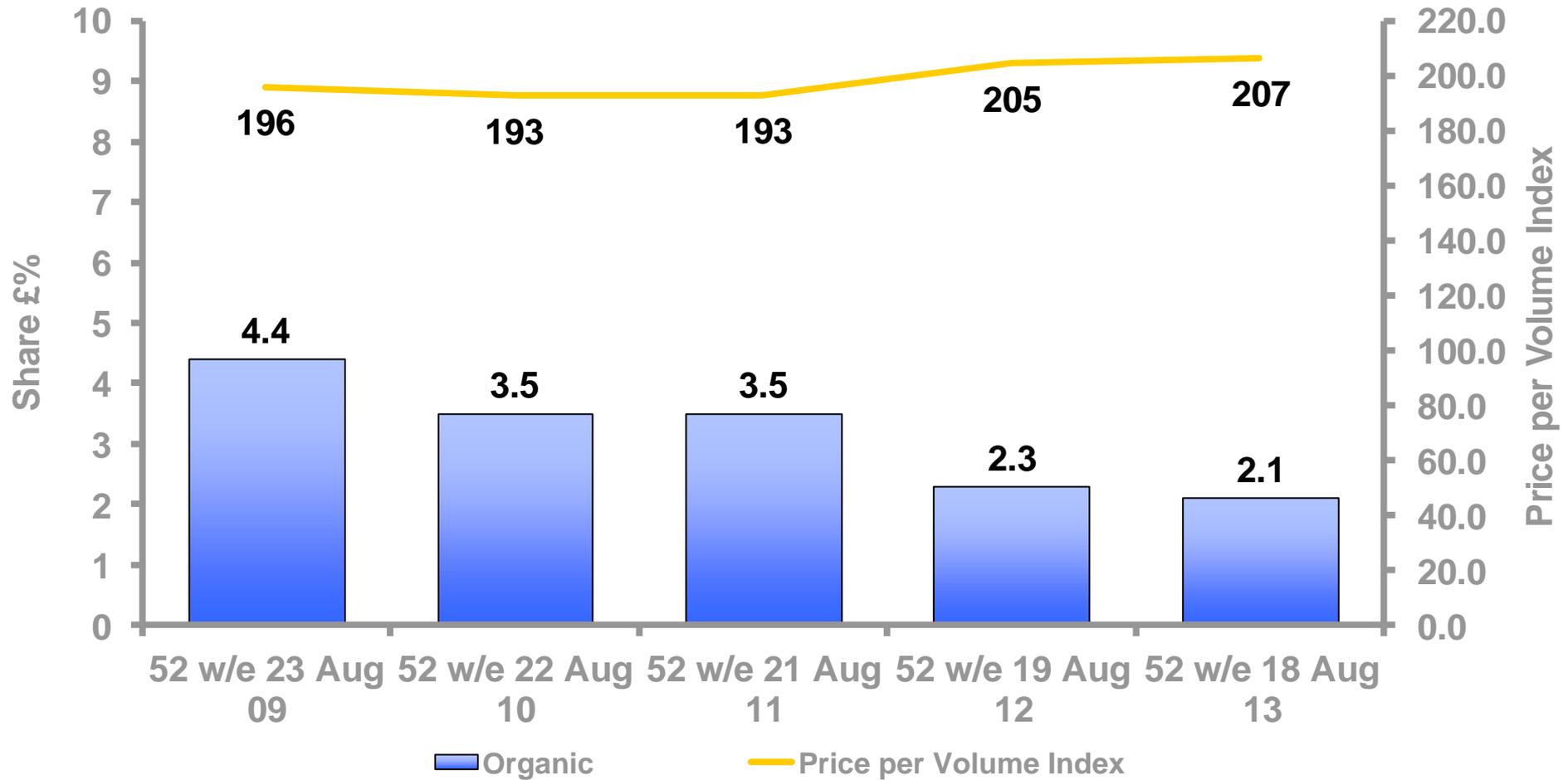
Not-Caged Eggs Market Share



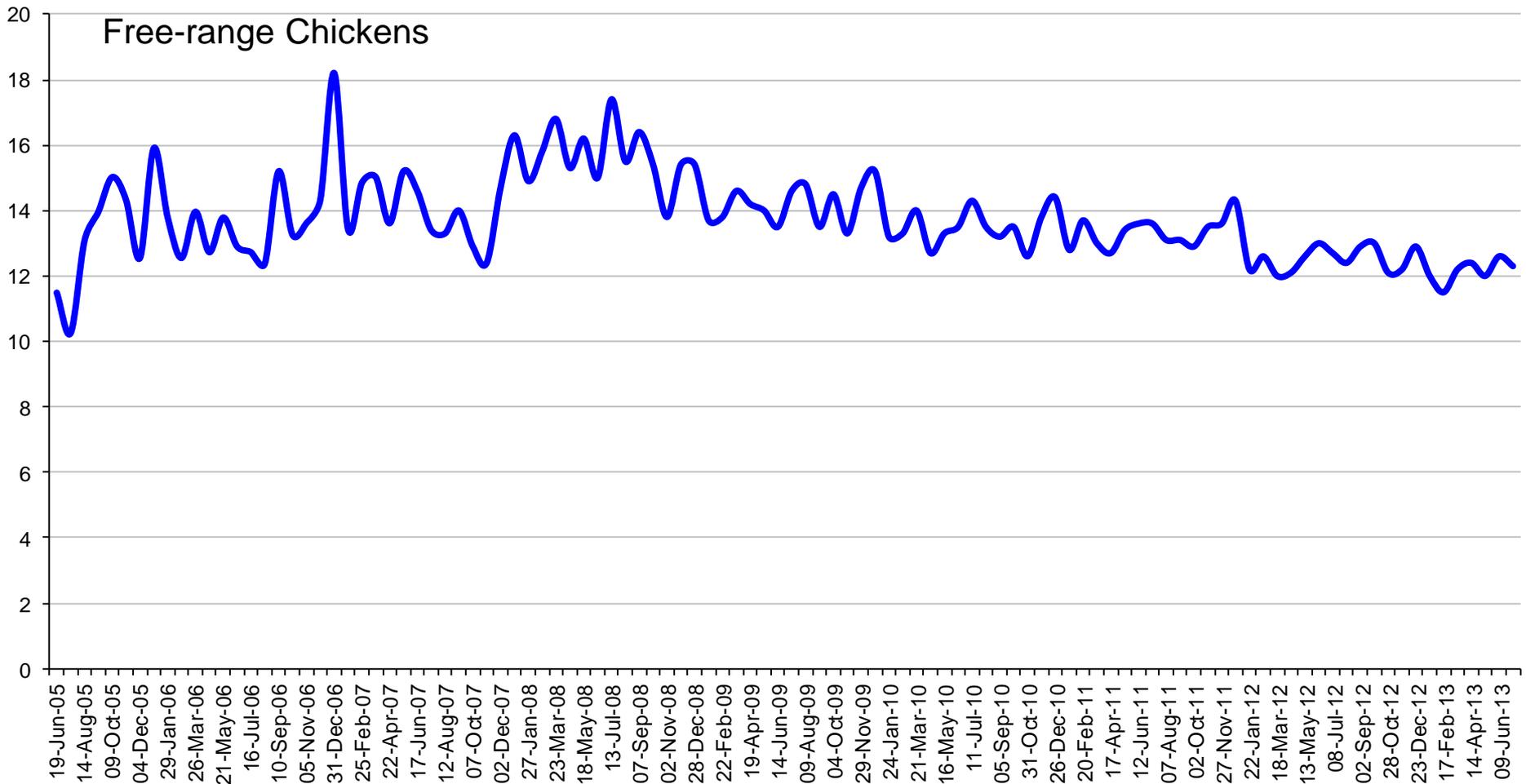
Free Range Eggs - Performance Analysis



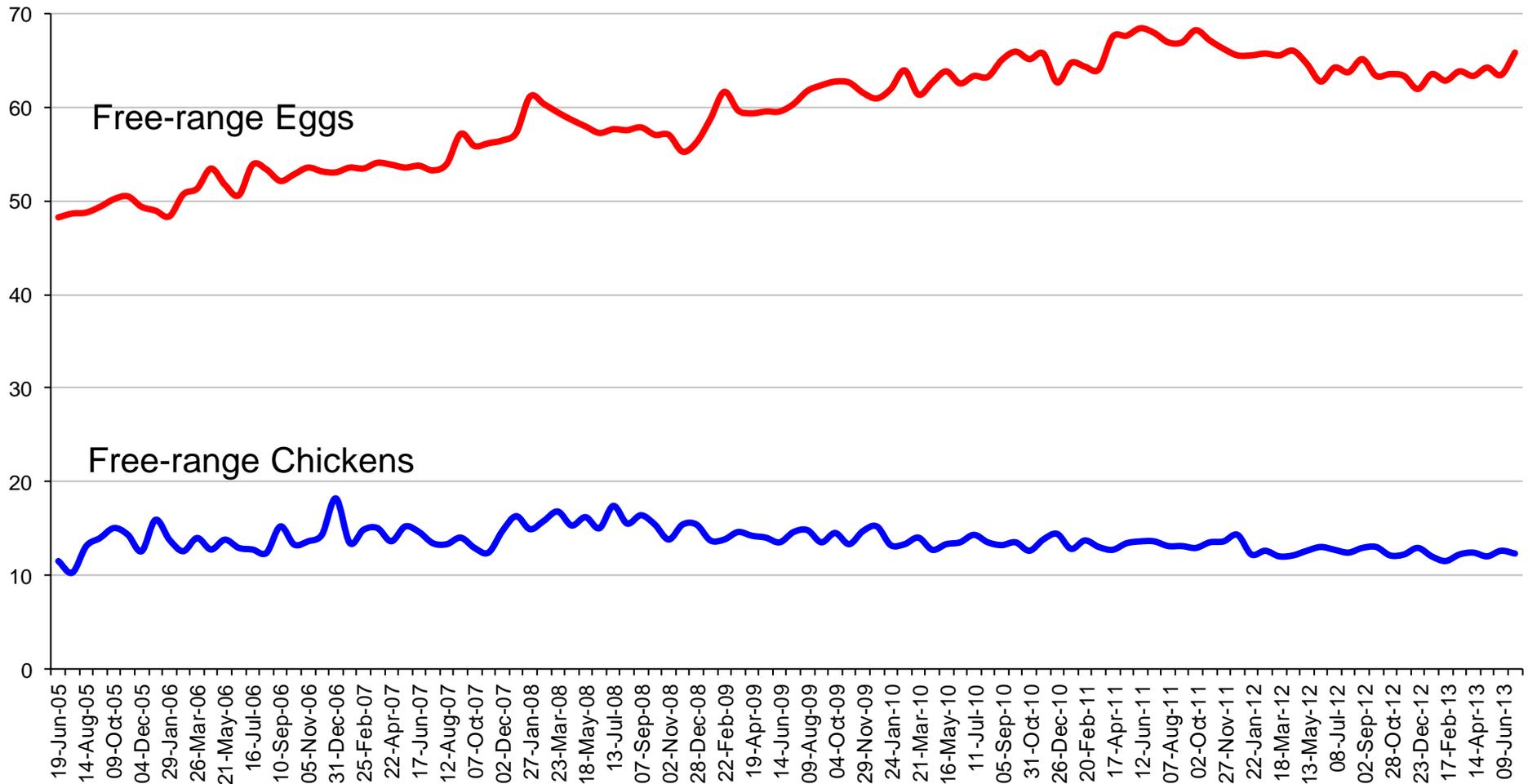
Organic Eggs - Performance Analysis



Free-range Market Share



Free-range Market Share



20x
20

**Our 20 commitments
to help us all
Live Well For Less
Our progress so far...**



Sainsbury's



Same price, different values.

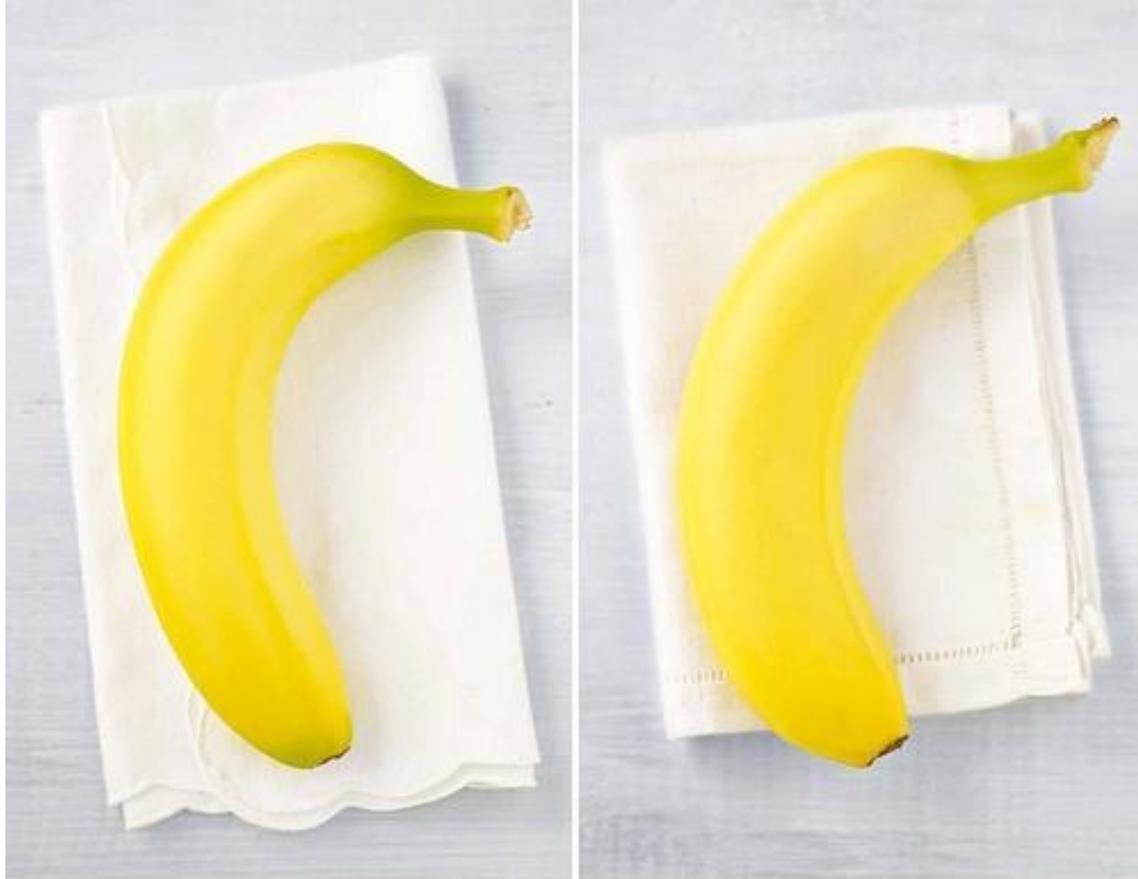
Now that most of the big supermarkets claim to be matching prices, you might be forgiven for thinking there's no real difference between them.

But take the ham in the rolls above. One's Basics Cooked Ham from Sainsbury's. It comes from pork that's only ever sourced within the UK.

The other's Everyday Value Ham from Tesco. It doesn't.

They cost exactly the same. But it's what you can't see that makes the difference.

 **Live
Well
For
Less** **Sainsbury's**



Same price, different values.

Now that most of the big supermarkets claim to be matching prices, you might be forgiven for thinking there's no real difference between them.

But take the two loose bananas above. One's from Sainsbury's. It's Fairtrade - which means a fair deal for the producers, irrespective of market forces.

The other's from Tesco. It isn't.

They cost exactly the same. But that's where the similarity ends.



Our basics eggs are inexpensive. But the chickens which lay them are free.

We don't cage any of our chickens, regardless of the price of their eggs.

Even the ones that lay our basics eggs are free to roam in large barns, doing chicken-y things like scratching, strutting and enjoying a dust bath.

In fact, all our eggs are from Freedom Food approved farms, inspected to strict RSPCA welfare standards.

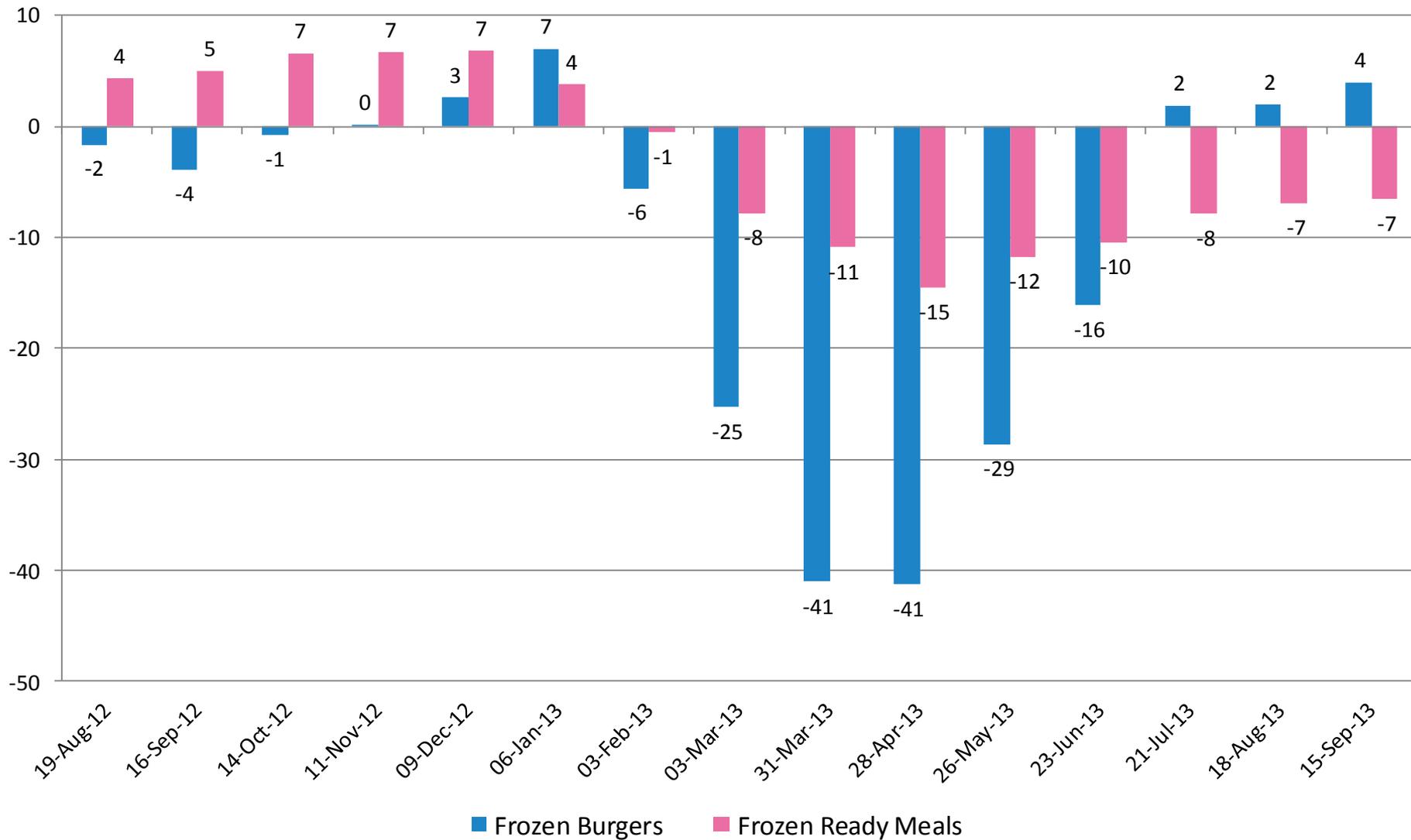
#valueofvalues

Live Well For Less Sainsbury's

When the ethics go wrong



Year on Year Changes - 12 w/e £%





If it's Freedom Food it's RSPCA welfare standards

Shopping guide for beef

[Home](#) > [Where to buy](#) > [Beef Guide](#)

By choosing high welfare products such as those labelled Freedom Food, you are directly helping to improve the lives of farm animals.



Where to buy

[Online Stockists](#)

Share this page



Think Pig!



Shopping guides



[For pork](#)



If it's Freedom Food it's RSPCA welfare standards

Shopping guide for lamb

[Home](#) > [Where to buy](#) > [Lamb Guide](#)

By choosing to purchase higher welfare products such as those labelled Freedom Food, you are directly helping the lives of farm animals.



Where to buy

[Online Stockists](#)

Share this page



Think Pig!

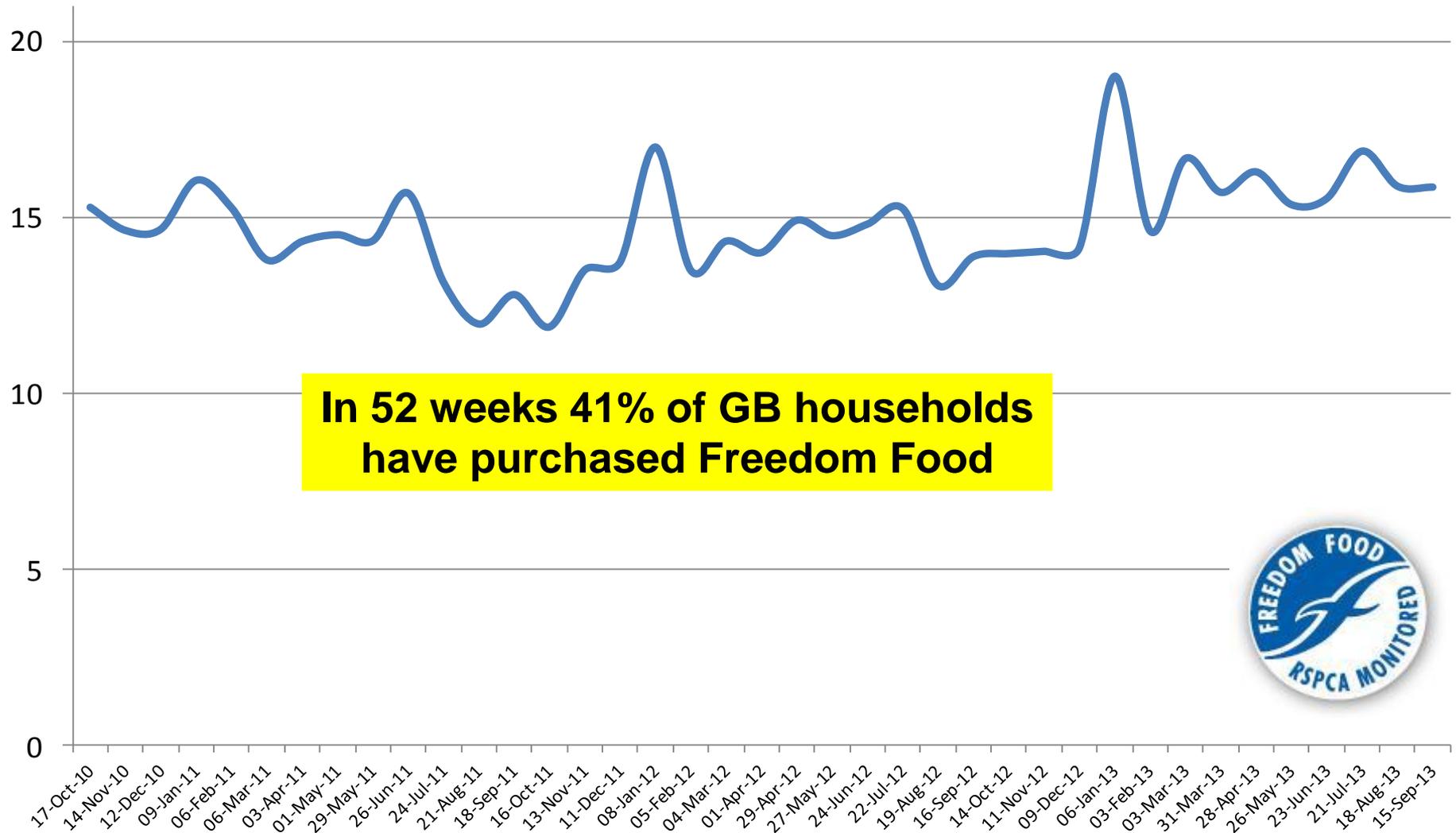


Shopping guides

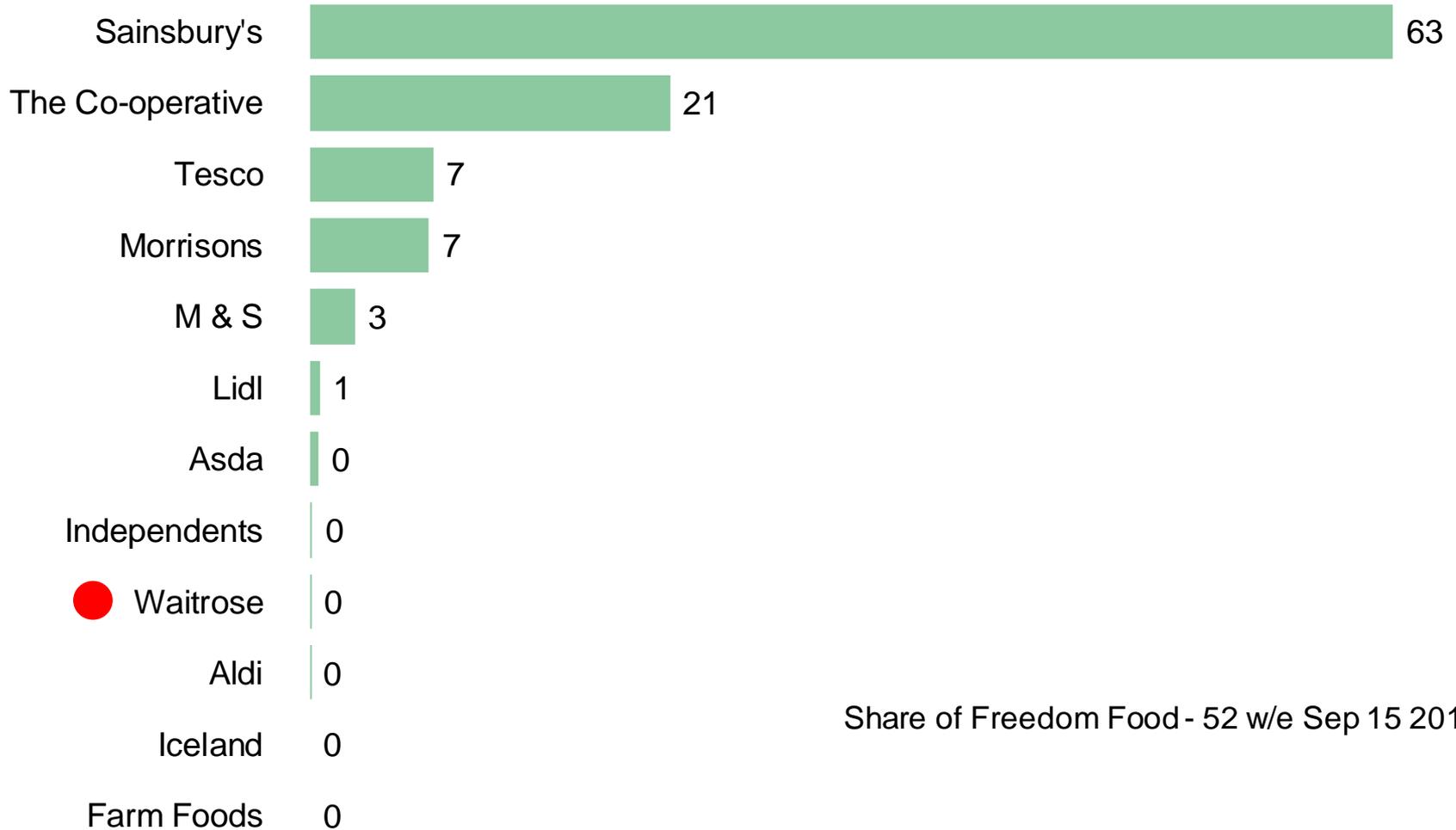


[For pork](#)

Freedom Foods - 4 weekly sales - £m

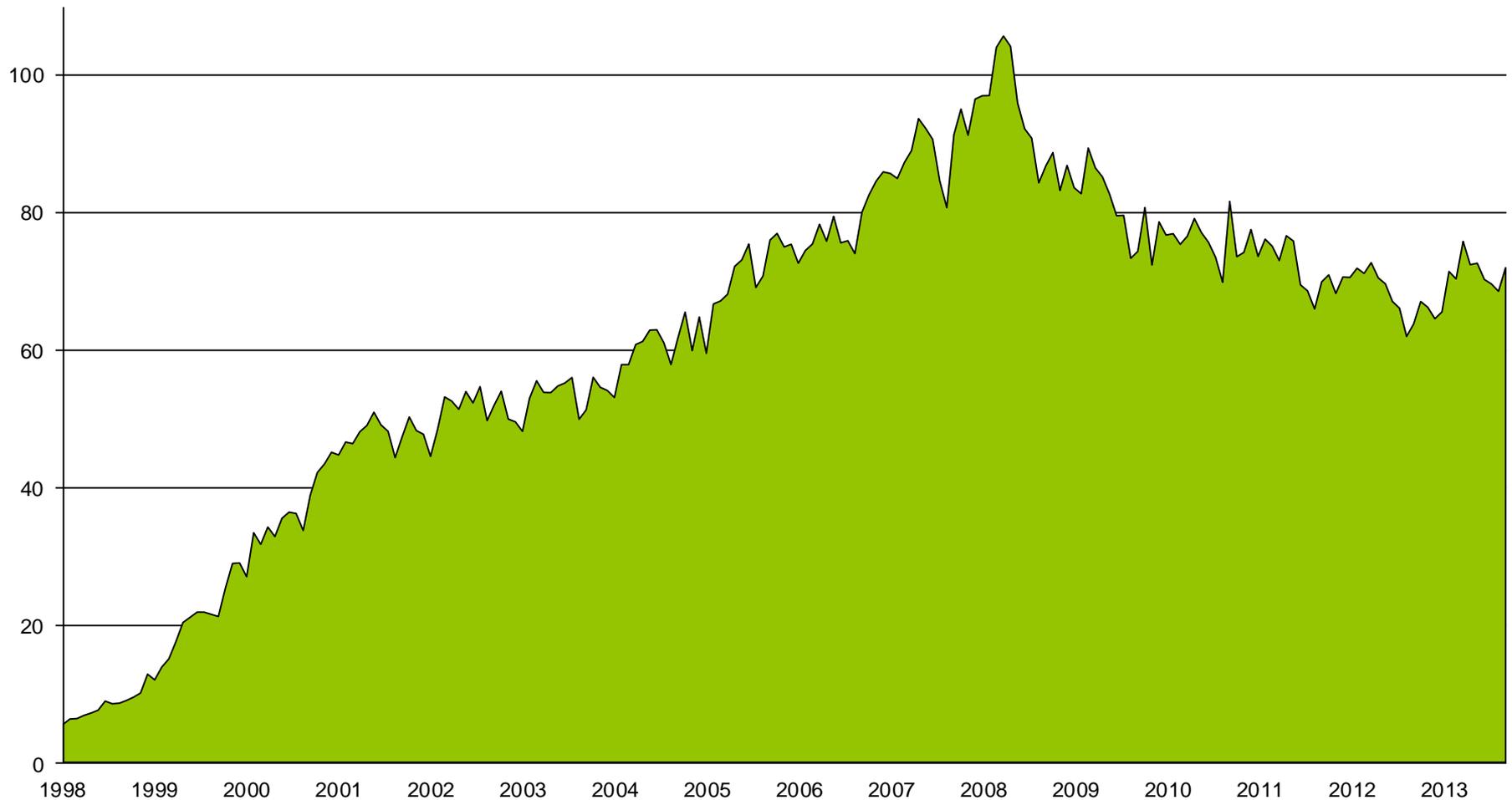


Freedom Food Shares

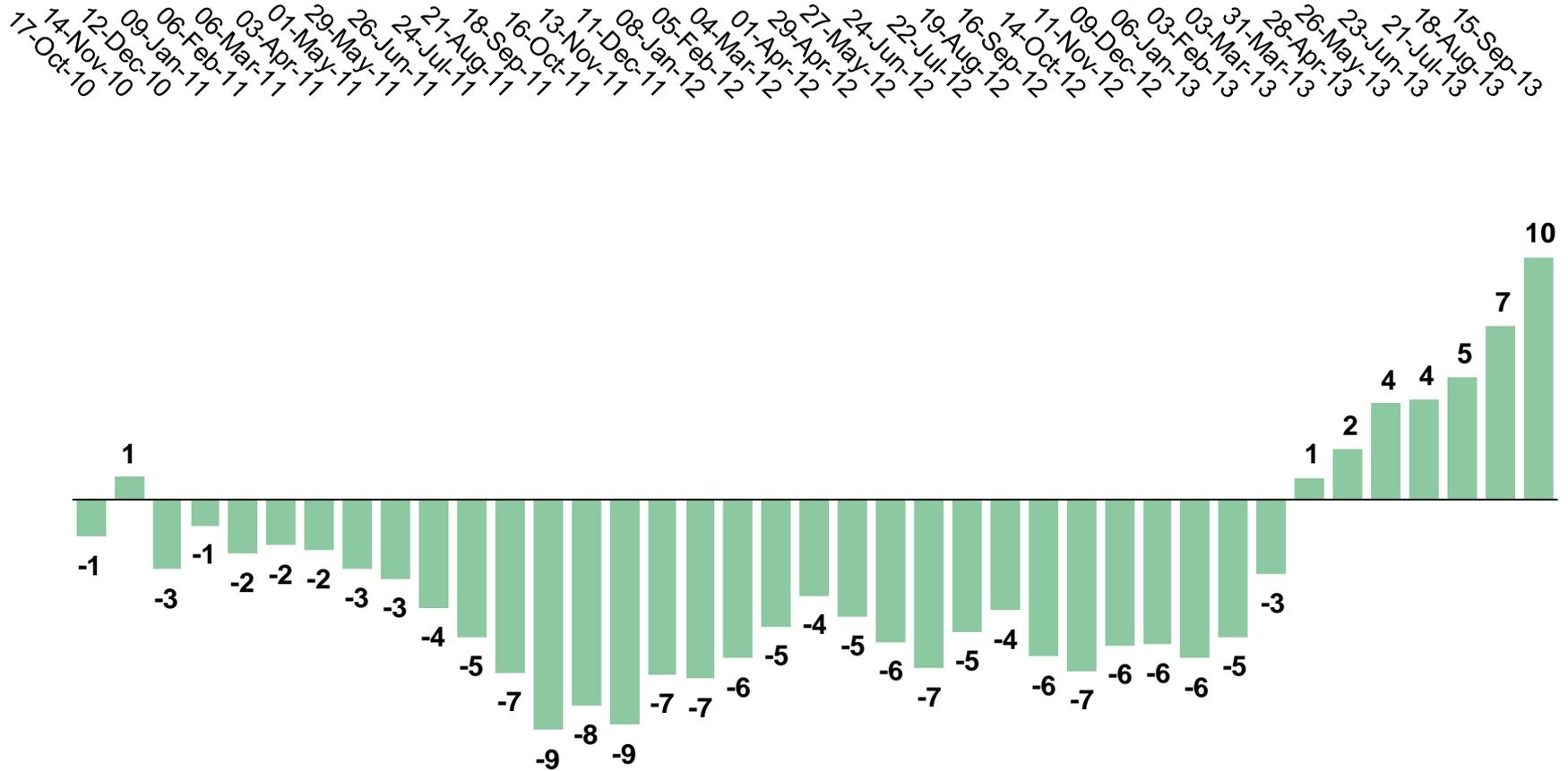


Share of Freedom Food - 52 w/e Sep 15 2013

Total Organic Grocery Products including Baby - 4 weekly £m



Total Organic Market (inc. Baby) Rolling 12 week periods Y-on-Y Change %

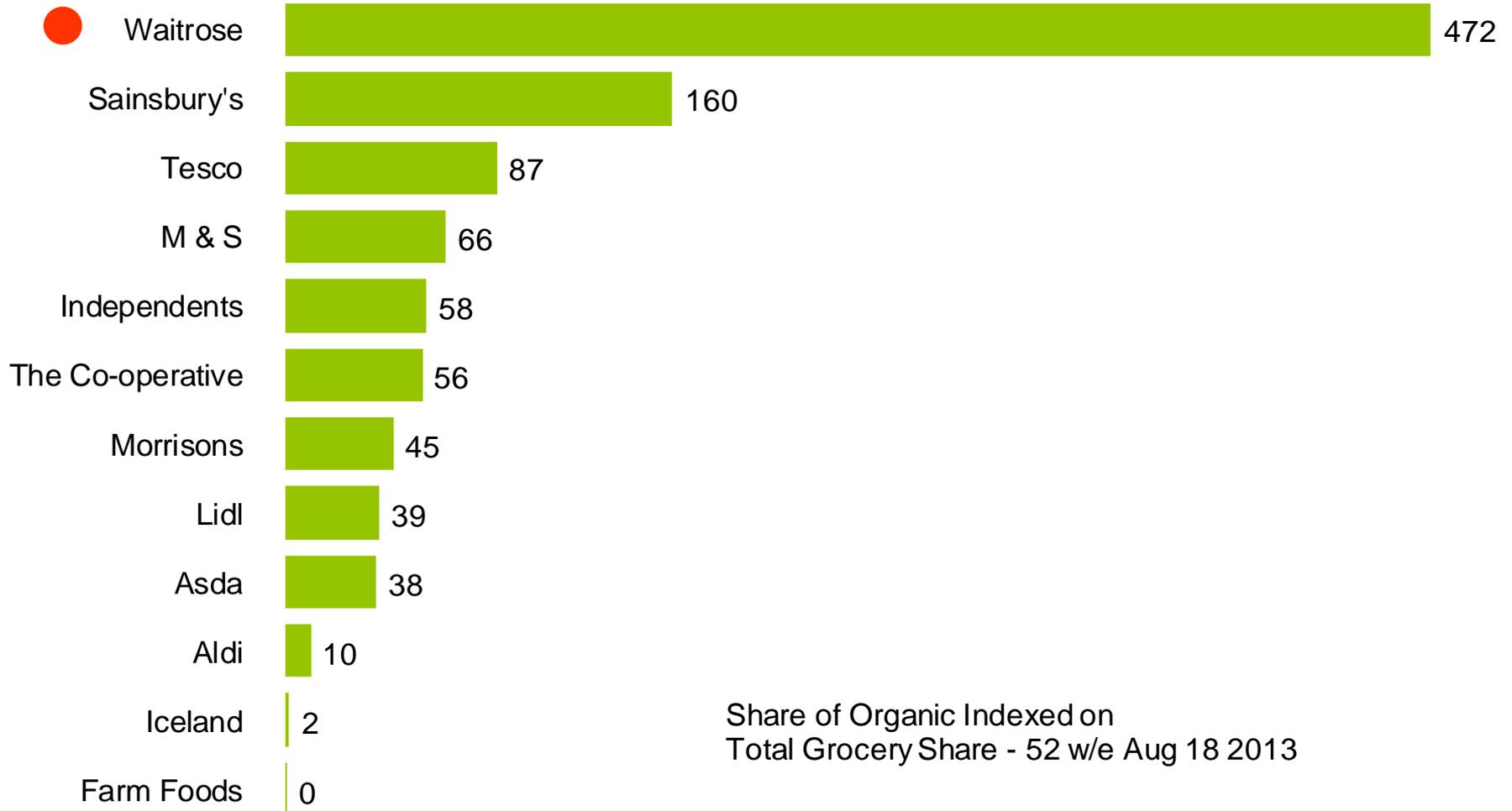


Organic Ranges - Growth Rates

	% Change
Total Organic Market	10
Branded	11
Own Label	8

52 w/e 15 Sep 13

Organic Trading Indices





Happy Wednesday! [LOG IN](#) or [REGISTER](#) for Yeokens



TASTY THINGS WE MAKE

WHAT'S 100% YEOGANIC?

SHARE TIPS & TRICKS

COLLECT YEOKENS



WELCOME TO OUR VALLEY
BRITISH FAMILY DAIRY
THE RIGHT WAY SINCE 1961

PULL ME



TRIM DOWN THE FAT BUT NOT THE FLAVOUR
Try our delicious Skinny Roast Potatoes >

It's 7°C in the valley

PLAY OUR FRUIT MACHINE

Fruit Machine



CLICK TO PLAY

WIN FAB PRIZES INSTANTLY



GOT A CODE FROM A SPECIAL PACK?



A FOODIE FAMILY ADVENTURE BREAK!

WIN ONE OF 10,000



GOT A CODE FROM A SPECIAL NATURAL POT?

Made with love

Treat your friends and family to something sweet this Valentine's Day.
[View all Valentine's Day recipes >](#)



Our Range



Competitions



Keep in touch

For delicious new products, seasonal recipes, competitions and more...



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GREEN & BLACK'S®

ORGANIC

G&B's

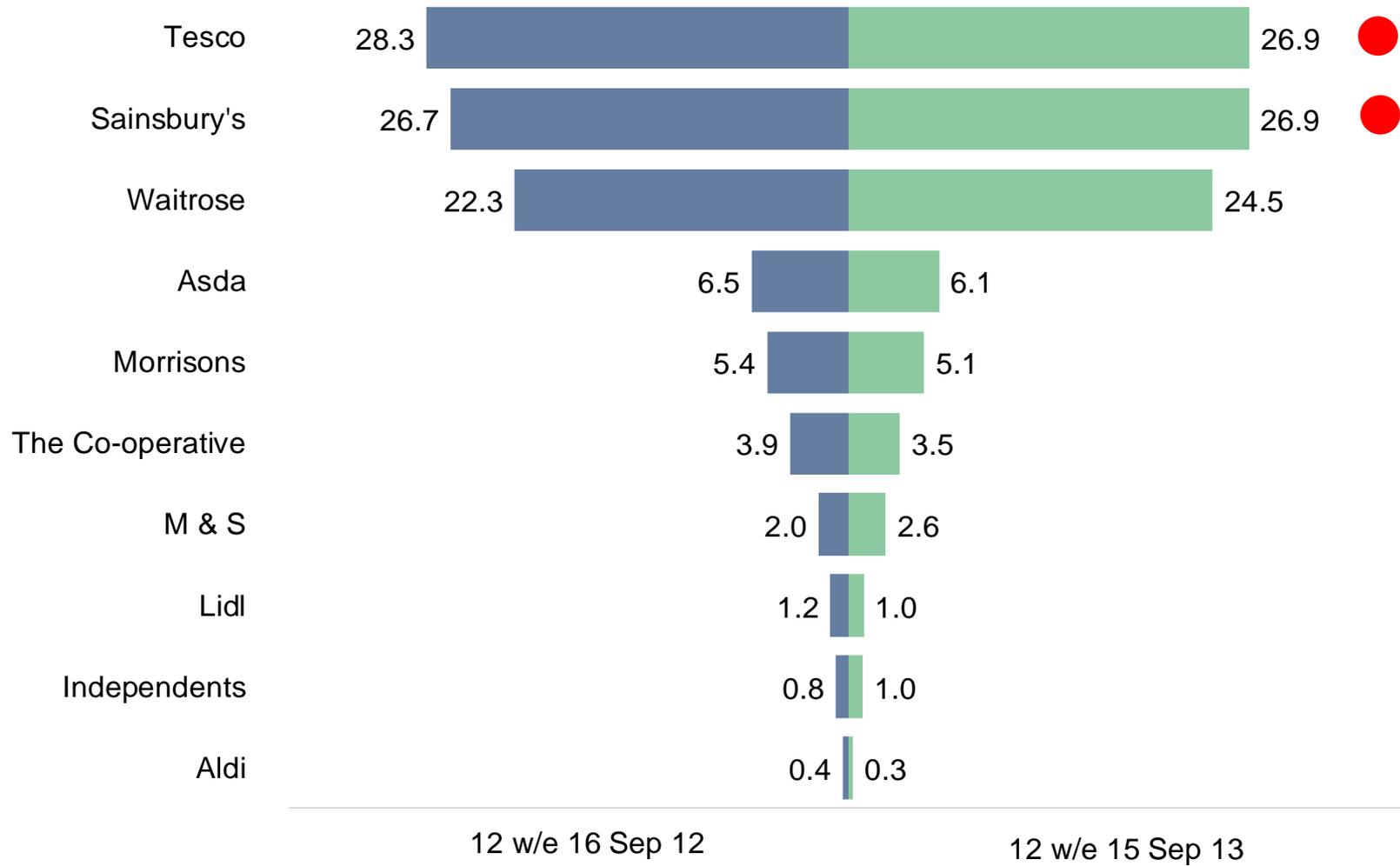
EUROPE

NORTH AMERICA

UK ONLINE STORE



Share of Total Grocers - Organic



Final thoughts

Sustainability has consumer appeal

Sustainability can differentiate retailers

..but

Increasing the Sustainability premium moves from Mainstream to Niche

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