

## Jubilant Jump In sales...

Contributed by Kantar Worldpanel  
Wednesday, 20 June 2012  
Last Updated Wednesday, 20 June 2012

...but it's still mixed fortunes for the big four

The latest grocery share figures from Kantar Worldpanel, published today for the 12 weeks ending 10 June 2012, show the market growing at 3.2% with a dramatic jump to 11.3% in the run-up to the Diamond Jubilee (week ending 3 June 2012). This meant there was an extra £213 million in the tills that week.

Edward Garner, director at Kantar Worldpanel, explains:

“The remarkable growth rate recorded over the Jubilee is a sign of what's to come during the Olympics when we expect grocery sales to soar. Competition is likely to be fierce with fortunes now considerably different among the big four.

“Both Tesco and Morrisons suffer share dips of 0.4 points this month whereas Asda and Sainsbury's have seen their shares strengthen. The two retailers have taken different paths to growth with Asda expanding its estate through its acquisition of the UK Netto stores and Sainsbury's enjoying a long-term trend of organic growth as stores are added one-by-one. What both outlets have in common is strong price messages – Asda with its Price Guarantee and Sainsbury's with its Brand Match – and this is supporting them well.”

The polarisation seen in recent months continues unabated with Aldi, Lidl, and Waitrose all holding on to all-time record shares – Aldi and Lidl both have 2.8% and Waitrose has 4.6%. All three outlets have successfully appealed to their respective shoppers who are now spending more in store.

Edward Garner continues:

“Iceland is growing at nearly twice the market average lifting sales by 6.3% this period. This is largely a result of the buoyant frozen food market, which tends to do well during times of economic uncertainty, and is currently the fastest growing grocery sector.”

An update on inflation

Grocery inflation stands at 4.4%\* for the 12 week period ending 10 June 2012. This is a welcome decrease from the level of 5.1% last period but remains above the market growth meaning that households are still trying to rein in grocery spending by managing down their “personal inflation”.

\*This figure is based on over 75,000 identical products compared year-on-year in the proportions purchased by British shoppers and therefore represents the most authoritative figure currently available. It is a “pure” inflation measure in that shopping behaviour is held constant between the two comparison periods – shoppers are likely to achieve a lower personal inflation rate if they trade down or seek out more offers.

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The number of households in the Kantar Worldpanel sample has increased by 20% to 30,000 – making it one of the largest continuous panels of its kind in the world. As part of this process, the monthly supermarket share data has been updated to reflect the panel changes, which come into effect from March 2012. Changes to retailer shares, as a result of the increased panel size, are marginal and do not impact reported performance.

Period-on-period changes will not be affected as the historical data has been reworked to maintain consistency.

Please also note, as part of this updating process, there has been a reduction in the stated Aldi turnover and market share to bring it in line with the outlet's own reported performance. The strong period-on-period growth trend of the outlet remains unaffected.

For all publicly-quoted Worldpanel data, users of our research (including media) must ensure that data is now sourced Kantar Worldpanel.

These findings are based on Kantar Worldpanel data for the 12 weeks to 10 June 2012. Kantar Worldpanel monitors the household grocery purchasing habits of 30,000 demographically representative households in Great Britain. All data discussed in the above announcement is based on the value of items being bought by these consumers, Kantar will only support data that is published in the context we have presented it and our own interpretation of these findings. We cannot be held responsible for any other interpretation of these findings.

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19 June 2012