



Trends in UK Cherries sales & consumption

52w/e & 12w/e
20th February
2022 as per notes

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Cherries market performance & drivers

Cherries retail performance

Understanding the Cherry
consumer



Mixed performance across Cherry areas, but Fresh Cherries leading the way.



2018

2019

2020

2021

2022

£132M

£125M

£113M

£111M

£129M



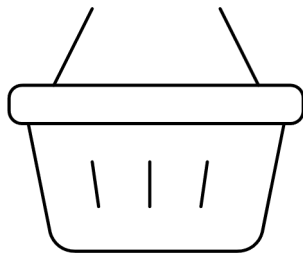
Fastest growing channel?

Main store



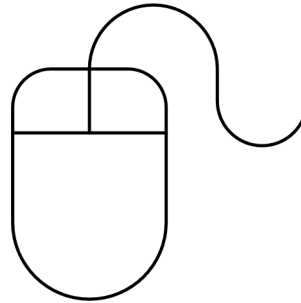
+17%

Convenience



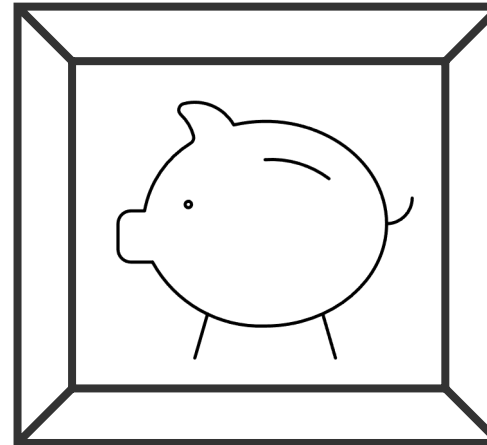
+9%

Online



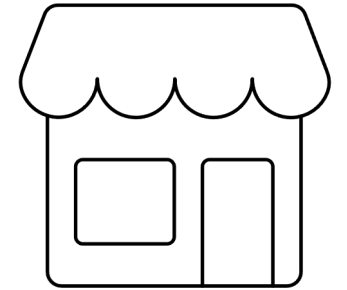
+21%

Discounters



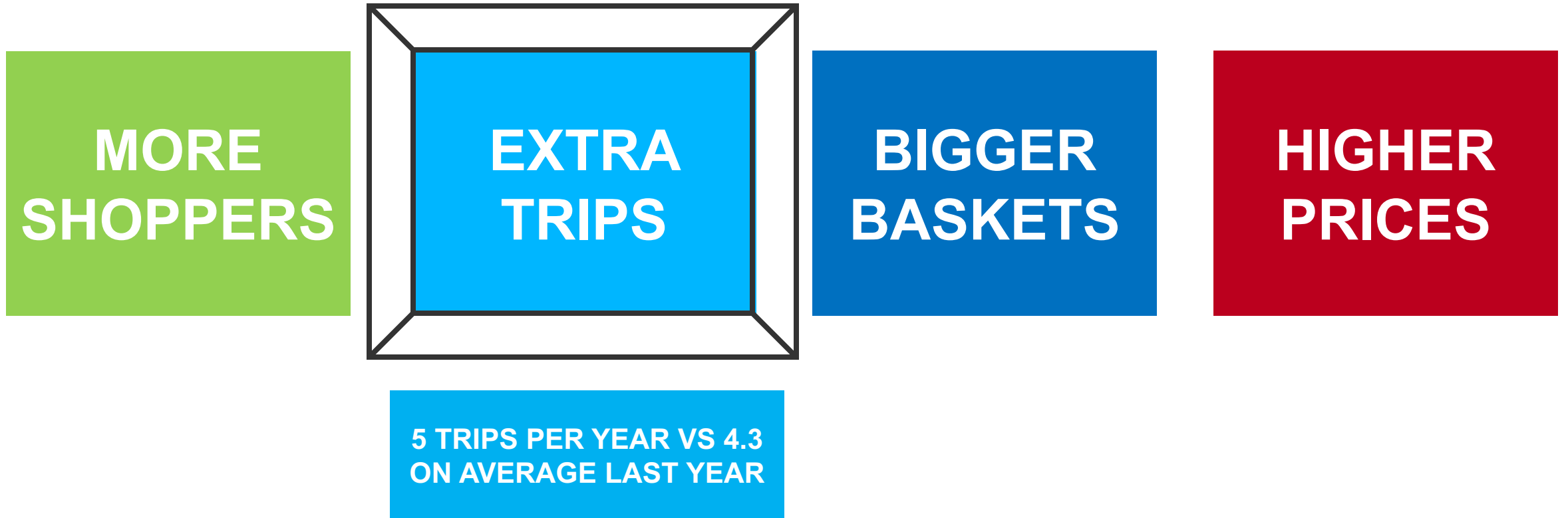
+37%

High Street /
Market Stalls



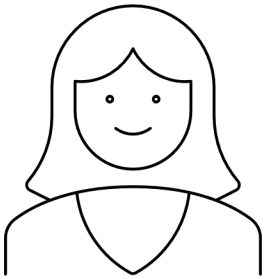
+1%

Shopper behaviour driving most growth



Fastest growing demographic?

Pre-families



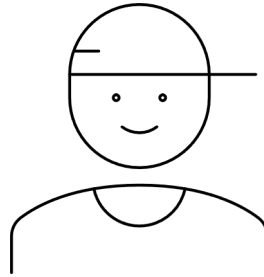
+16%

Families



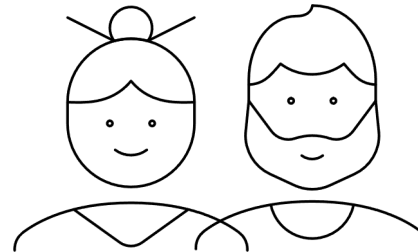
+12%

Older dependents



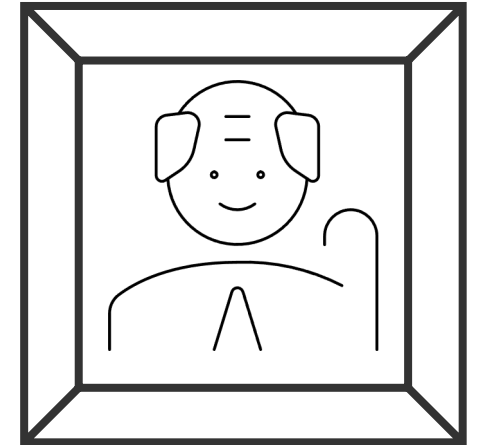
+13%

Empty nesters



+16%

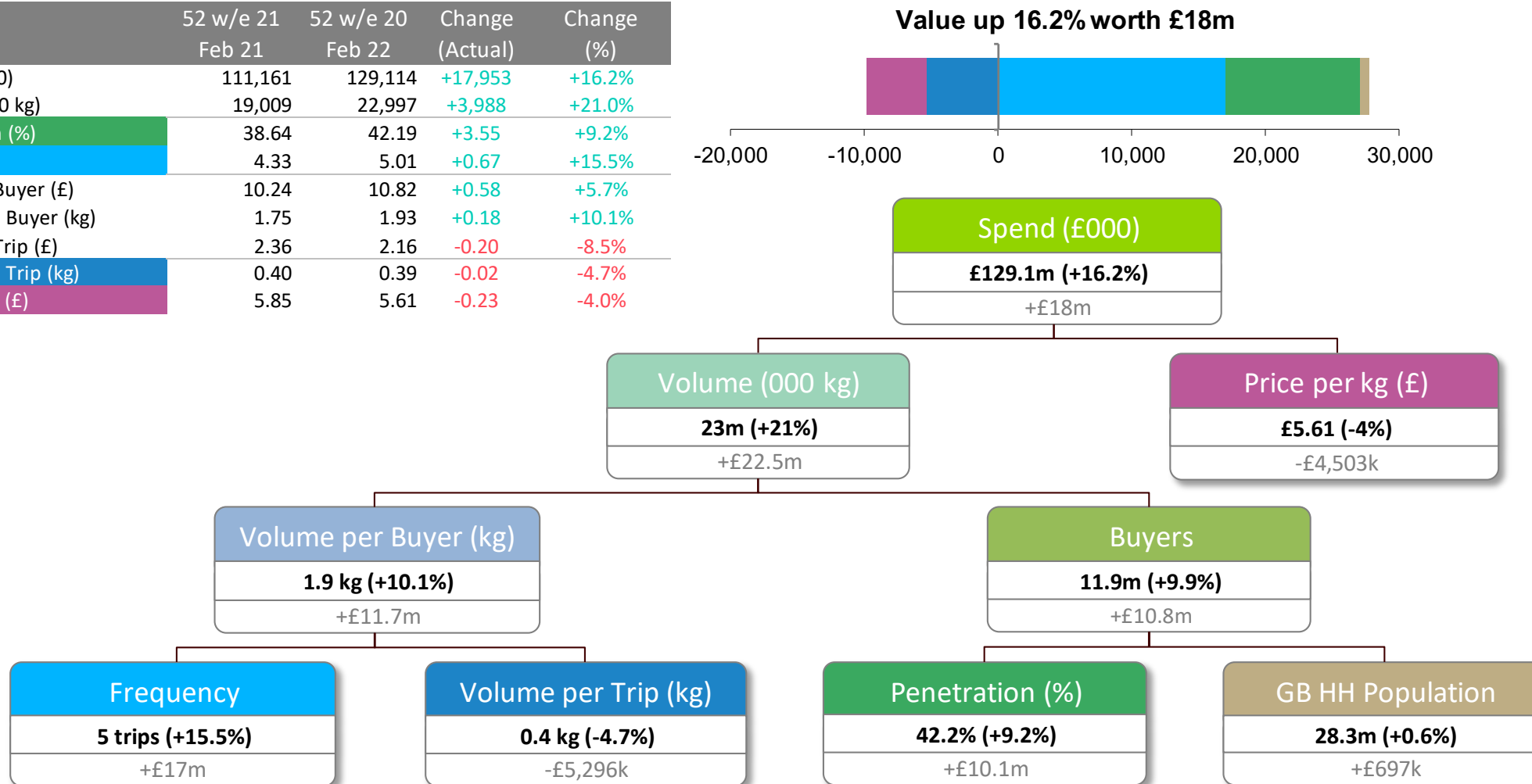
Retirees



+19%

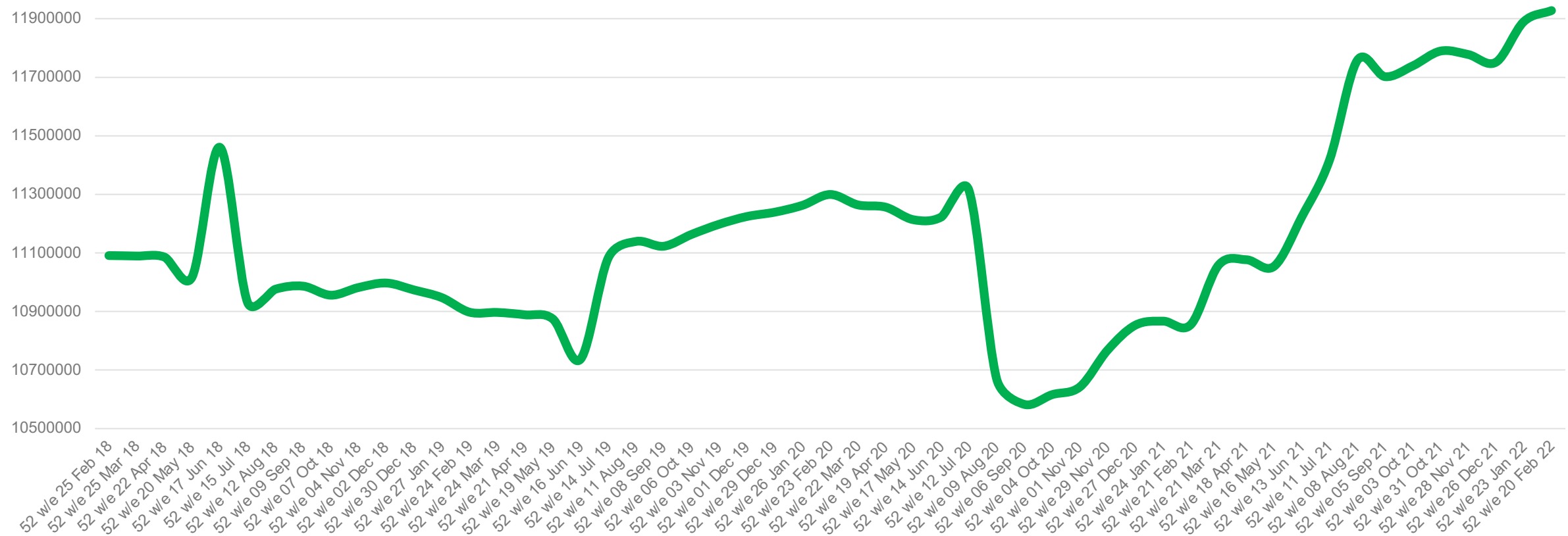
An influx of new shoppers and extra trips has driven the market forward.

Measure	52 w/e 21 Feb 21	52 w/e 20 Feb 22	Change (Actual)	Change (%)
Spend (£000)	111,161	129,114	+17,953	+16.2%
Volume (000 kg)	19,009	22,997	+3,988	+21.0%
Penetration (%)	38.64	42.19	+3.55	+9.2%
Frequency	4.33	5.01	+0.67	+15.5%
Spend per Buyer (£)	10.24	10.82	+0.58	+5.7%
Volume per Buyer (kg)	1.75	1.93	+0.18	+10.1%
Spend per Trip (£)	2.36	2.16	-0.20	-8.5%
Volume per Trip (kg)	0.40	0.39	-0.02	-4.7%
Price per kg (£)	5.85	5.61	-0.23	-4.0%

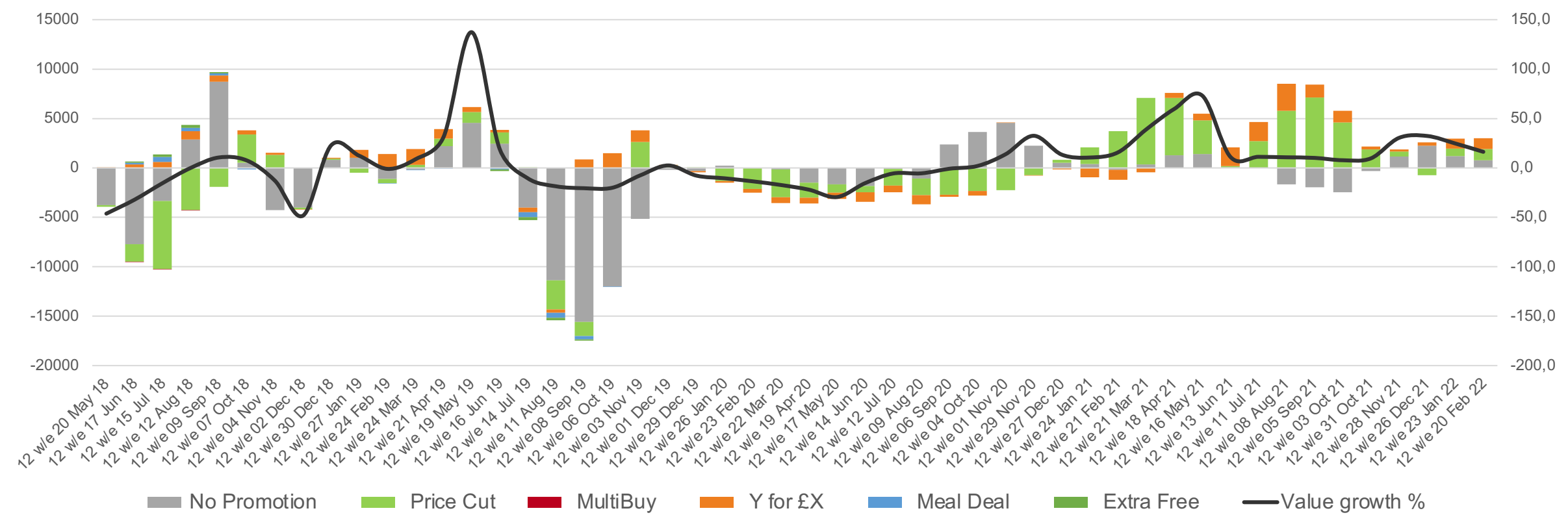


A record (nearly) 12m households buying Cherries in Britain!

Households buying Cherries in Britain (within one year)

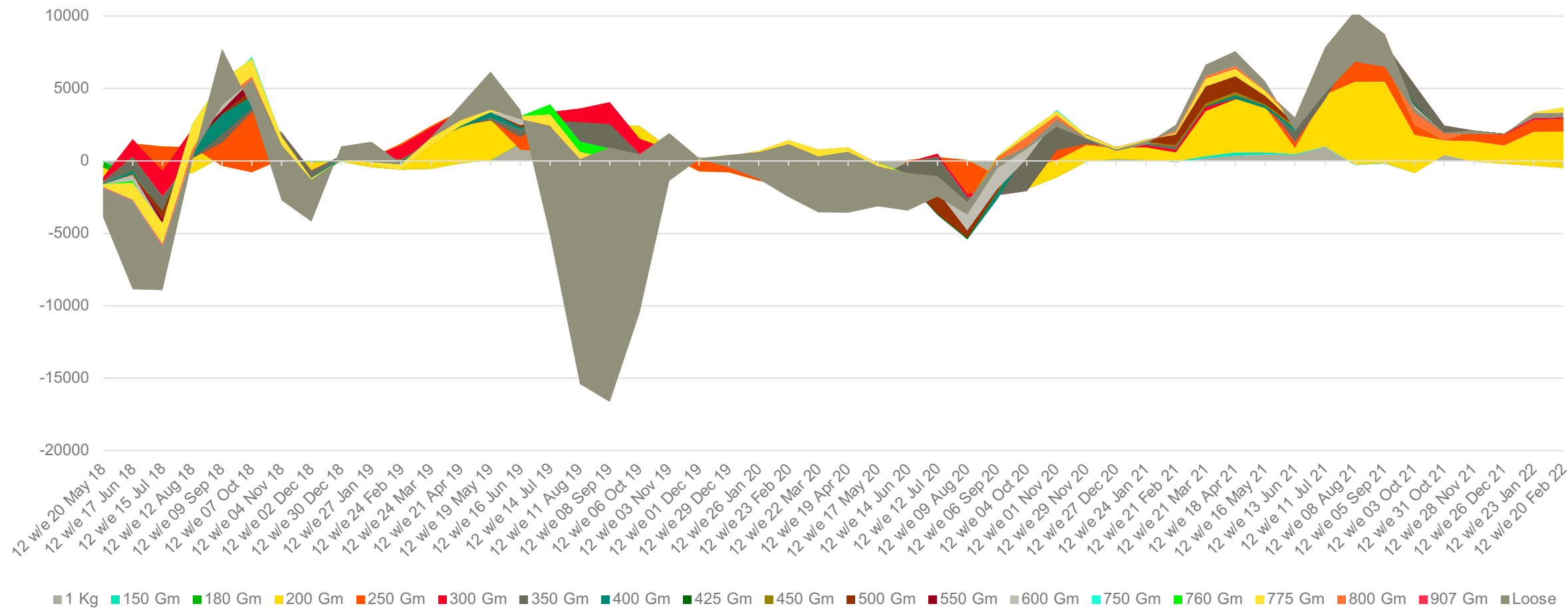


Much of this growth has been helped by promotions, but deals haven't unduly eroded base sales.

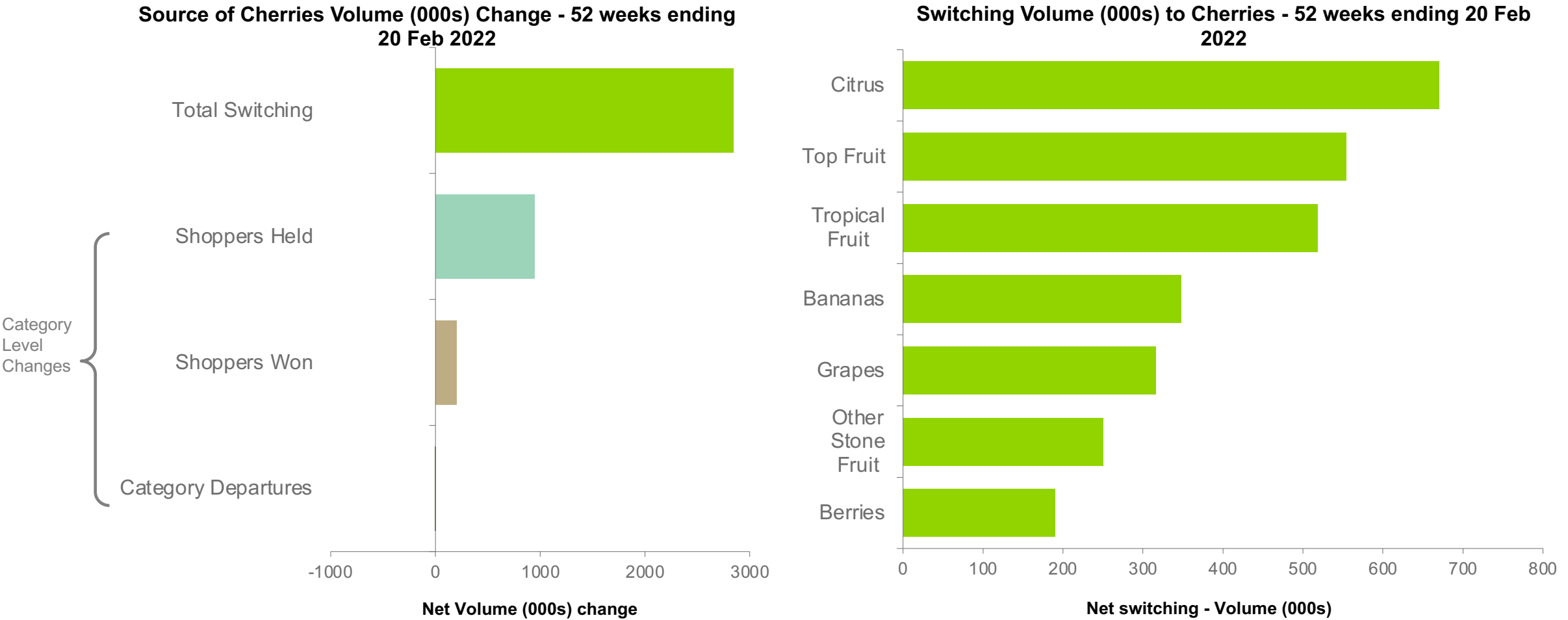


200g the main pack size driving this growth, with some resurgence of loose.

Value YoY change



However more recently, better availability and promotions have led to switching gains from other fruits.



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Purely from a shopper engagement perspective, a **record year** for Cherries in Britain...

Lower £/kg and growth of **smaller packs** means value performance not as impressive...

Promotions have led to significant shifts of shopper spend from other fruits.





Cherries market
performance & drivers

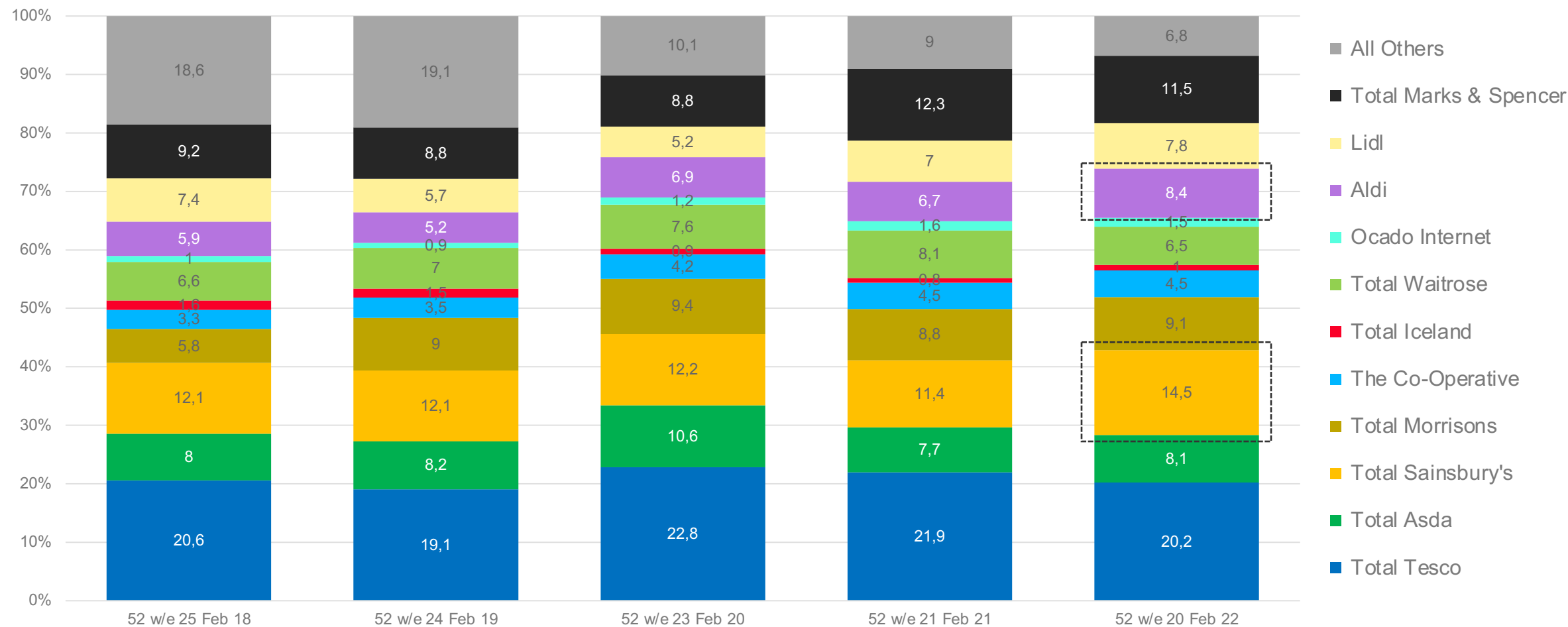
**Cherries retail
performance**

Understanding the Cherry
consumer



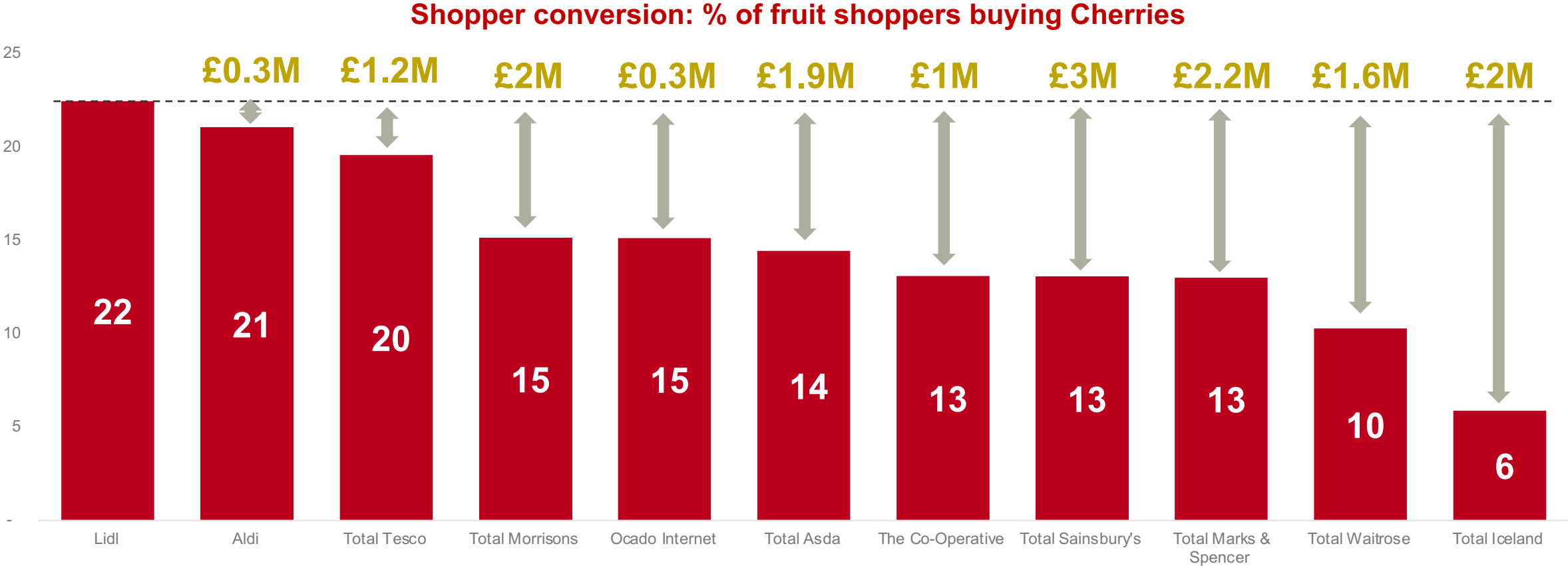
Latest retailer shares: Sainsbury's and Aldi the big winners

Long term erosion of market stalls sales the main story



Big opportunities for retailers to match best in class retail execution.

Over 1 in 5 fruit shoppers in Lidl buy Cherries; fixture simplicity / feature space



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Sainsbury's and Aldi the winning retailers

Both over-promoted vs market and used **simple price cuts**, with no adverse effect on base sales.

Discounters bounce back this year...other retailers have big rewards on offer if they **improve conversion**.





Cherries market
performance & drivers

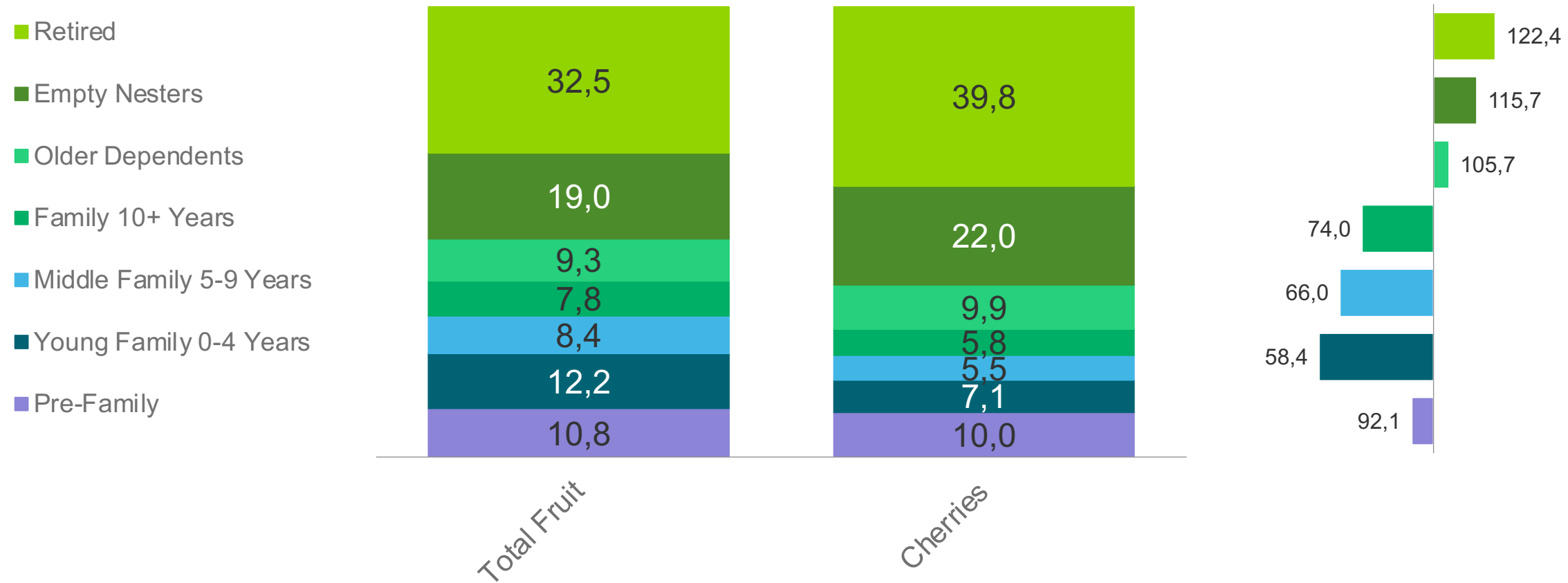
Cherries retail performance

**Understanding the Cherry
consumer**



Important nuances in the Cherries shopper: significantly older.

Cherries Index vs Total Fruit



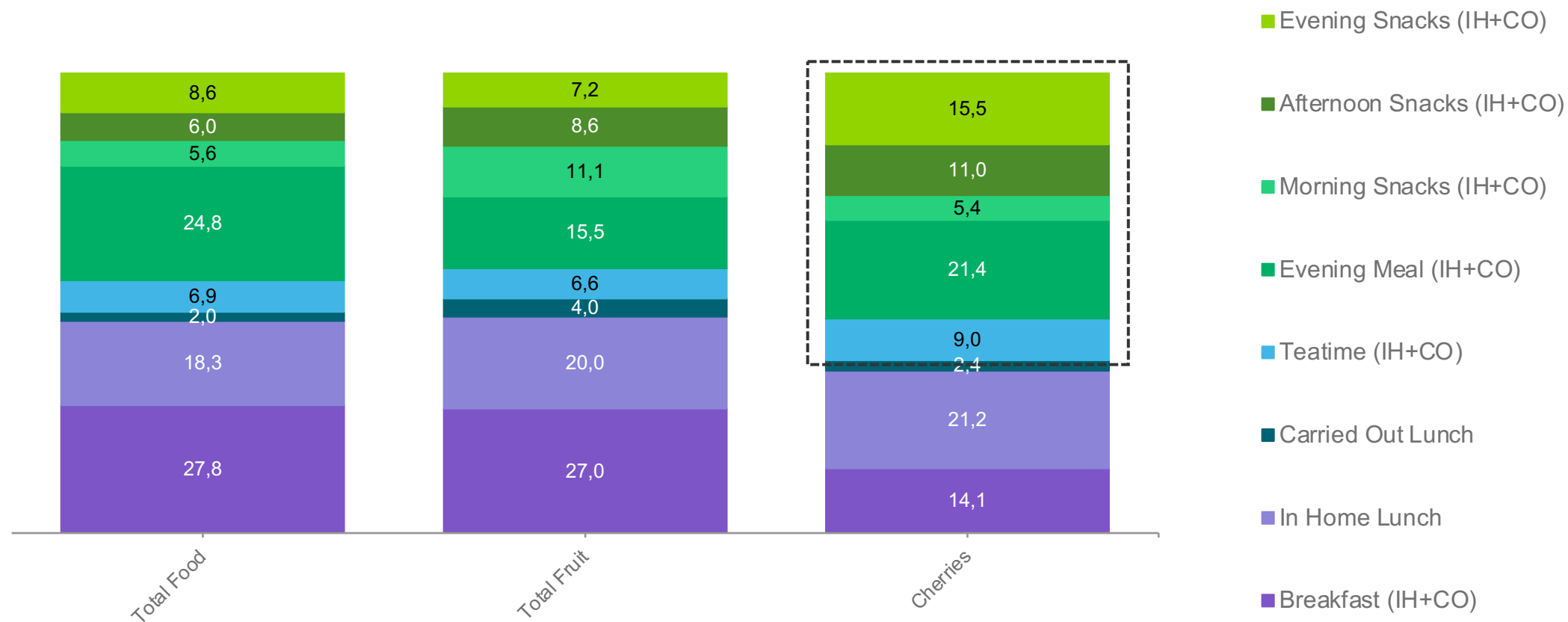
Important nuances in the Cherries shopper: *very slightly* less affluent.



Women are the most important Cherry consumers

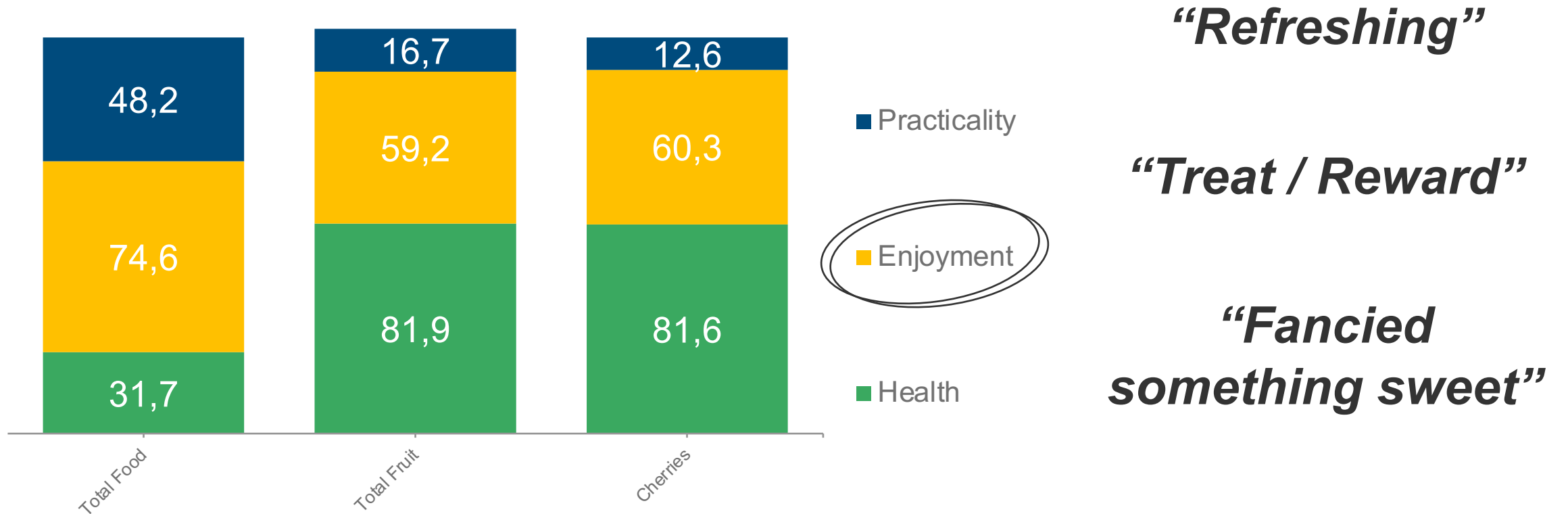


Cherries have a unique consumption pattern compared to total fruit: evening meal and snacks are the key occasion to target.



Could more be dialled up in product marketing about great taste?

Under-index in 'enjoyment' vs total food



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Recovery (& record) year for Cherries driven by smaller packs + price cuts.

JS & Aldi the standouts; big **opportunities to improve shopper conversion**

Females are key consumers; ensure full representation in decision making & **market to key occasions.**

