



# IRI Pulse Report Chilled and Fresh

Welcome to the Pulse Q2 2014 edition for chilled and fresh. We hope you find it useful. Please do not hesitate to contact us if you have any questions or comments at [EU.Marketing@IRIworldwide.com](mailto:EU.Marketing@IRIworldwide.com).

**Q2 2014**

[IRIworldwide.eu](http://IRIworldwide.eu)



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## About the Report

- This chilled and fresh report is one of 10 super category reports designed to show high-level comparison and analysis for retail markets across major countries in Europe.
- This report contains data gathered from around Europe. This market was split into the following categories: yogurts, dairy desserts and drinks, cream, eggs, margarines, butter, fats and spreads, milk, cheese, chilled juices, fresh desserts, salads, tofu/soya, chilled dips and sauces, ready meals, chilled fish and seafood, charcuterie, fresh vegetables and fresh fruit.
- The report highlights key metrics, such as total sales figures, market trends, category shares, winners and losers for Europe and for individual countries.
- The data has been sourced from IRI retail databases and Eurostat – the statistical branch of administration for the European Commission.
- The countries included in the report are: France, Germany, Italy, the Netherlands, Spain and the United Kingdom (UK).
- The market channels used for each country in this report are as follows:

| Country | Channels used  |
|---------|--|
| UK      | Hypermarkets, supermarkets, drugstores and impulse outlets                                   |
| ES      | Hypermarkets, supermarkets, hard discounters and drugstores. It includes the Canary Islands. |
| DE      | Hypermarkets, supermarkets, hard discounters and drugstores                                  |
| NL      | Hypermarkets, supermarkets, hard discounters and drugstores                                  |
| IT      | Hypermarkets, supermarkets, small self service, hard discounters and drugstores              |
| FR      | Hypermarkets and supermarkets  |

- For analytical purposes the data sourced from available retail databases has been consolidated to provide consistent results. However, for some countries it was not possible to source data pertaining to certain categories. Where this occurred, it has been documented in the *Notes* section found at the end of the report.

## On the Radar

Chilled and fresh was the surprise success story of the economic crisis. However, as we enter a period of greater economic certainty, the market is struggling to maintain growth, impacted by deflation and shifting shopper needs. There is a real opportunity for retailers and manufacturers alike to use the emergence from recession to promote the quality that is unique to chilled and fresh and drive demand, premiumisation and, ultimately, sales back into the market.

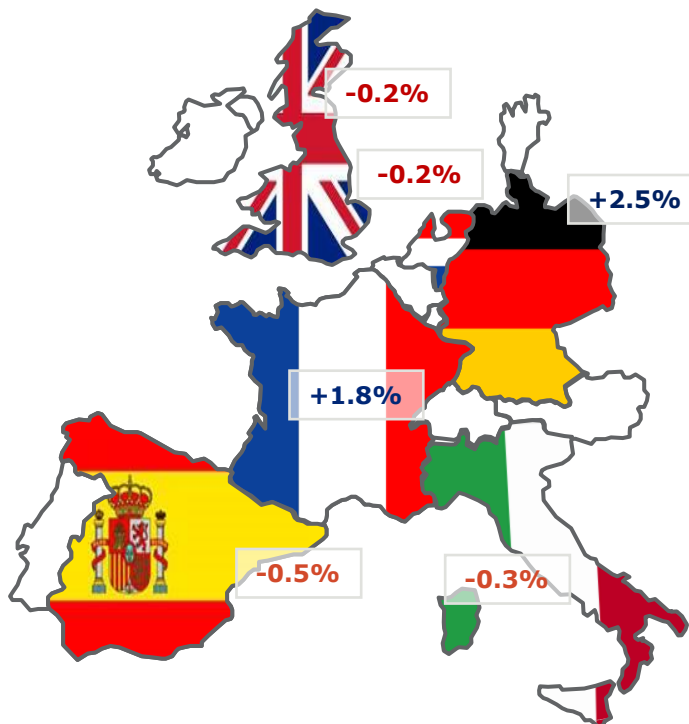
### ECONOMIC FIGURES INFLUENCING CONSUMER BEHAVIOUR

|                | POPULATION IN MILLIONS |           | UNEMPLOYMENT (%) |           | AVERAGE 12 MONTH INFLATION RATES |           | GDP IN MILLIONS (€) |           |
|----------------|------------------------|-----------|------------------|-----------|----------------------------------|-----------|---------------------|-----------|
|                | Jan. 2012              | Jan. 2013 | Average 2012     | Sep. 2013 | Average 2012                     | Sep. 2013 | 2012                | 2013 (e)  |
| France         | 65.3                   | 65.6      | 10.2             | 11.1      | +2.5                             | +1.2      | 2 032 297           | 2 059 358 |
| Germany        | 80.3                   | 80.5      | 5.5              | 5.2       | +2.4                             | +1.8      | 2 644 200           | 2 694 499 |
| Italy          | 59.3                   | 59.6      | 10.7             | 12.5      | +3.5                             | +1.8      | 1 565 916           | 1 568 388 |
| Netherlands    | 16.7                   | 16.8      | 5.3              | 7.0       | +2.8                             | +3.1      | 600 638             | 604 459   |
| Spain          | 46.8                   | 46.7      | 25.0             | 26.6      | +2.3                             | +2.3      | 1 049 525           | 1 051 076 |
| United Kingdom | 63.4                   | 63.8      | 7.9              | 7.5       | +3.7                             | +2.7      | 1 901 001           | 1 854 920 |

Source: Eurostat, September 2013

# GLOBAL TRENDS

## TOTAL CHILLED & FRESH VALUE SALES AND % CHANGE VERSUS PRIOR YEAR

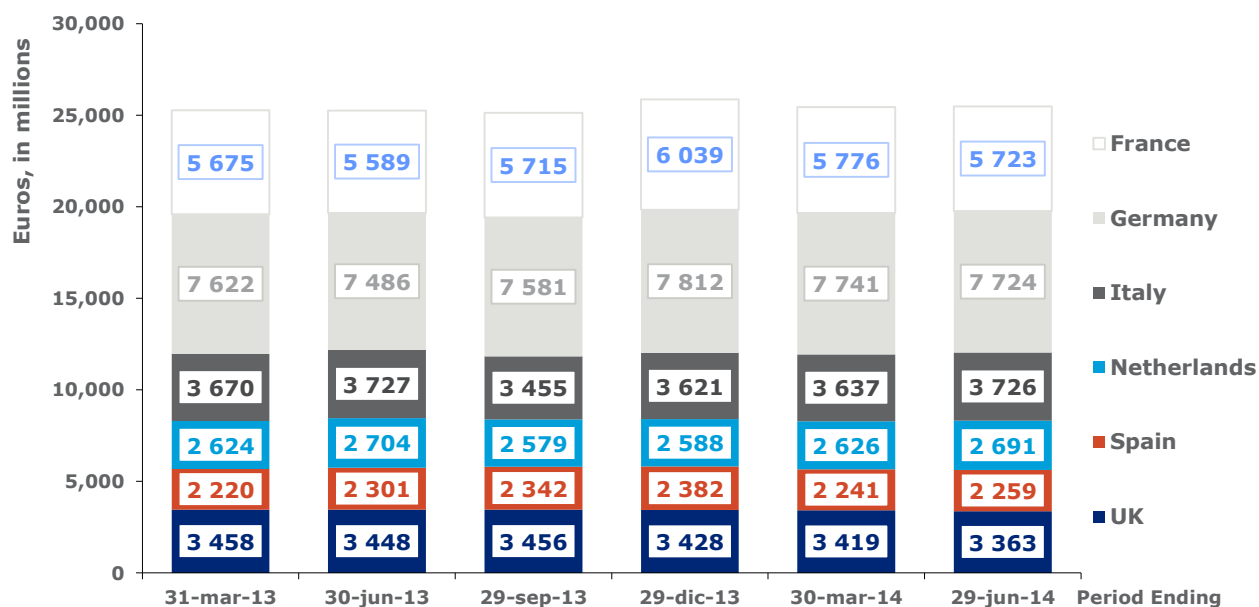


| VALUE SALES IN MILLIONS (€) |         |
|-----------------------------|---------|
| Total EU                    | 10 1926 |
| DE                          | 30 858  |
| FR                          | 23 253  |
| IT                          | 14 440  |
| UK                          | 13 667* |
| NL                          | 10 485  |
| ES                          | 9 225   |

\*based on an exchange rate of €1.150 to the pound

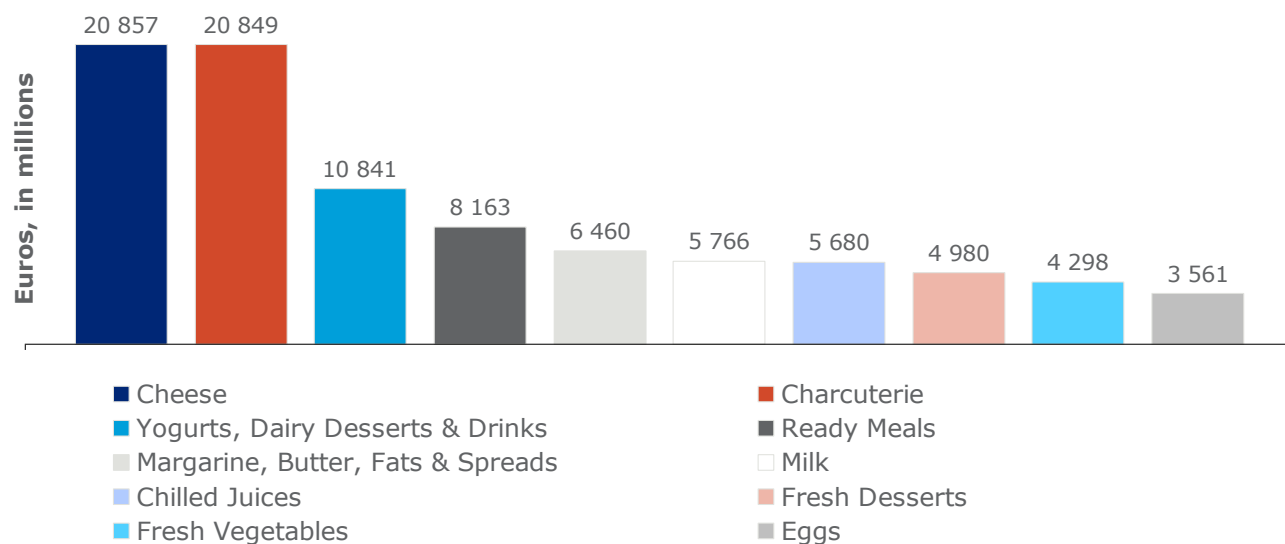
**TOTAL EUROPE +1.0%**

## TOTAL CHILLED AND FRESH VALUE SALES FOR THE LAST SIX QUARTERS



Source: IRI retail databases, period ending 29 June 2014 and prior five quarters

## CATEGORY VALUE SALES IN THE LAST YEAR



| SHARE OF CHILLED AND FRESH VALUE FOR THE YEAR |       |
|---|-------|
| Cheese  | 20.5% |
| Charcuterie                                   | 20.5% |
| Yogurts, Dairy Desserts & Drinks              | 10.6% |
| Ready Meals                                   | 8.0%  |
| Margarine, Butter, Fats & Spreads             | 6.3%  |
| Milk  | 5.7%  |
| Chilled Juices                                | 5.6%  |
| Fresh Desserts                                | 4.9%  |
| Fresh Vegetables                              | 4.2%  |
| Eggs  | 3.5%  |
| Fresh Fruit                                   | 2.6%  |
| Chilled Fish and Seafood                      | 2.4%  |
| Salads  | 2.4%  |
| Cream   | 2.0%  |
| Chilled Dips and Sauces                       | 0.7%  |
| Tofu / Soya                                   | 0.1%  |

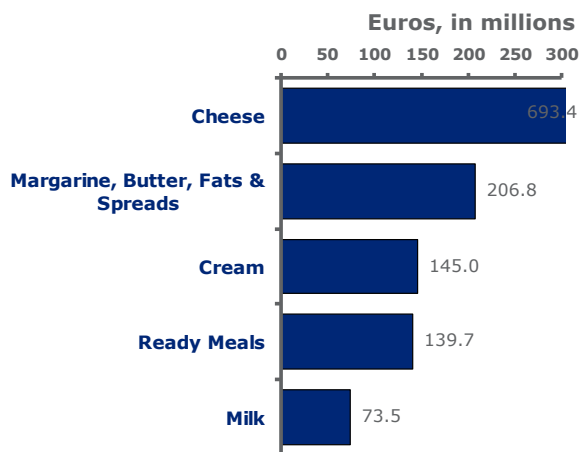
## KEY TRENDS

- The chilled and fresh market in Europe posted growth of 1.0% in the 2<sup>nd</sup> quarter of the year, halting the growth deceleration trend and enjoying its strongest performance in three quarters. This growth is due to strong chilled and fresh performance from Germany and France (up 2.5% and 1.8%, respectively), who together represent over half of the value sales of the European market.
- The remaining smaller markets are all experiencing declines, with Italy and the UK of particular concern. The chilled and fresh market weathered the storm of the economic crisis in Europe, but as the economic situation improves, chilled and fresh is struggling to maintain momentum.

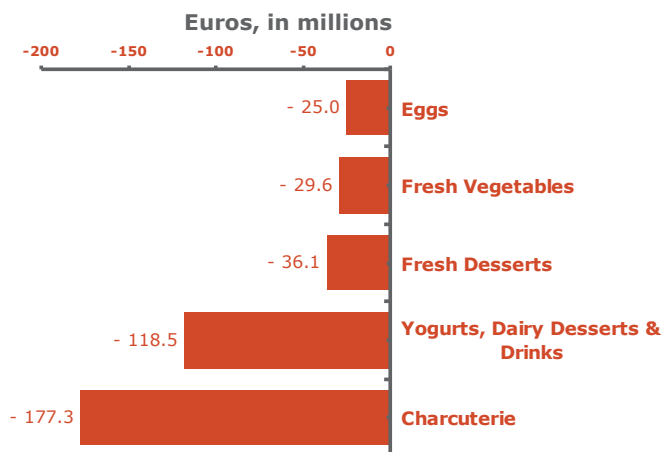
Europe includes: France, Germany, Italy, the Netherlands, Spain and the United Kingdom

Source: IRI retail databases, period ending 29 June 2014

## TOP WINNERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)

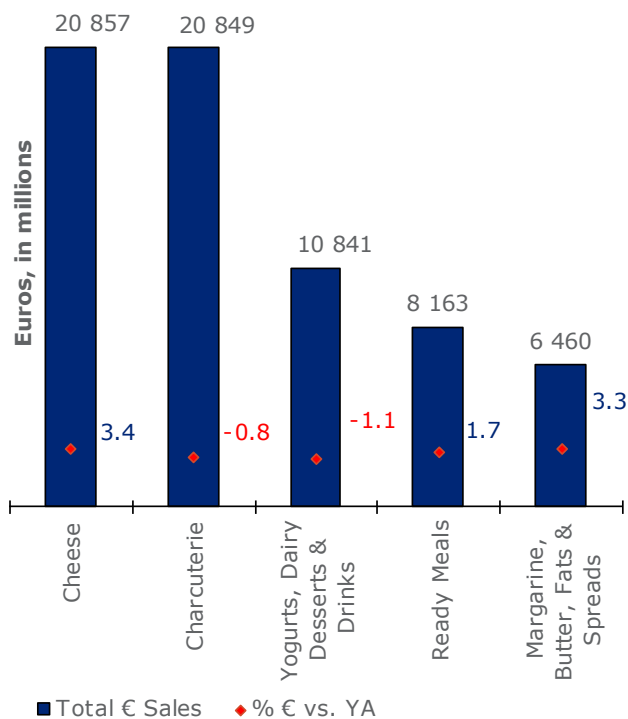


## TOP LOSERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



## TOP 5 CATEGORIES: EVOLUTION

Value sales (€) and % change versus a year ago



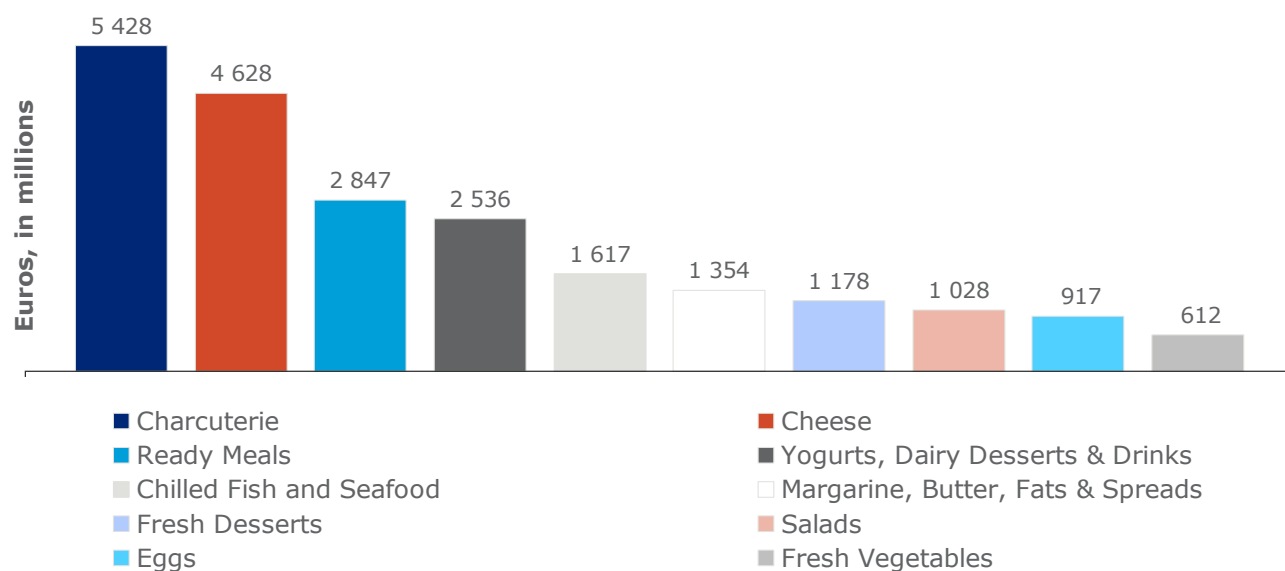
## CATEGORY INSIGHTS

- Cheese continues to drive strong growth for the chilled and fresh sector, with sales up 3.4%—well above the rate of inflation. Cheese is driving growth in all markets, except Spain, due to a common trend across Europe for increased value segments, such as mozzarella.
- The largest decline in Q2 is evidenced in charcuterie, which previously enjoyed a steady long-term growth trend. The Netherlands contributed to this in part, but the majority of the decline was driven by the massive German market (- €124.3m). Hard discounters suffered the sharpest declines, and losses are significant enough to impact the total European performance trends.

Europe includes: France, Germany, Italy, the Netherlands, Spain and the United Kingdom

Source: IRI retail databases, period ending 29 June 2014

## CATEGORY VALUE SALES IN THE LAST YEAR



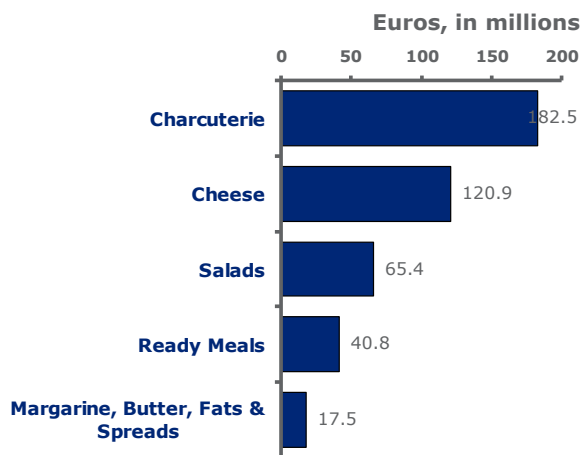
| SHARE OF CHILLED AND FRESH VALUE FOR THE YEAR |       |
|---|-------|
| Charcuterie                                   | 23.3% |
| Cheese  | 19.9% |
| Ready Meals                                   | 12.2% |
| Yogurts, Dairy Desserts & Drinks              | 10.9% |
| Chilled Fish and Seafood                      | 7.0%  |
| Margarine, Butter, Fats & Spreads             | 5.8%  |
| Fresh Desserts                                | 5.1%  |
| Salads  | 4.4%  |
| Eggs  | 3.9%  |
| Fresh Vegetables                              | 2.6%  |
| Chilled Juices                                | 1.5%  |
| Cream   | 1.2%  |
| Fresh Fruit                                   | 1.1%  |
| Milk  | 0.4%  |
| Tofu / Soya                                   | 0.3%  |
| Chilled Dips and Sauces                       | 0.3%  |

## KEY TRENDS

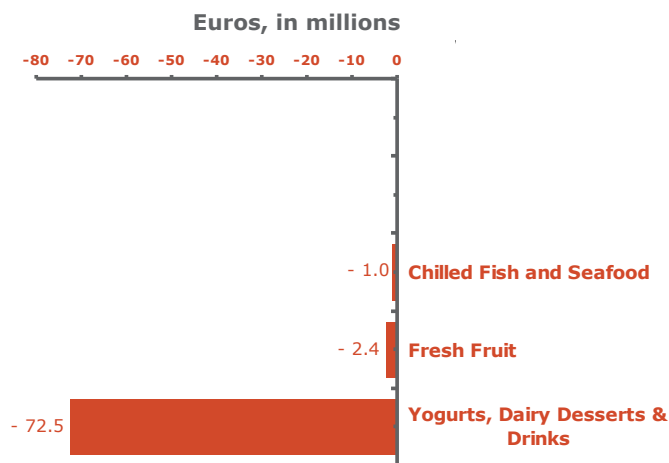
- In Q2 2014, value sales of chilled and fresh categories grew 2.6% versus the prior year. This is an improvement on Q1 (which saw growth of 1.8%), bringing total H1 2014 growth of 2.2%. This is above the average fast moving consumer goods (FMCG) industry growth of 1.9%.
- Chilled and fresh value growth has accelerated since the second half of 2013. This evolution could be explained by price context, with deflation at the end of the year. But in recent months, we have seen this fall back in some categories, such as cheese and butter. Average prices for chilled and fresh categories are now nearly flat (versus a decline of 1.0% for FMCG).
- Two strong trends are supporting chilled and fresh growth: snacking (e.g., sandwich, fresh salads) and homemade ingredients (e.g., eggs, grated cheese).

Source: IRI retail databases, period ending 29 June 2014

## TOP WINNERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)

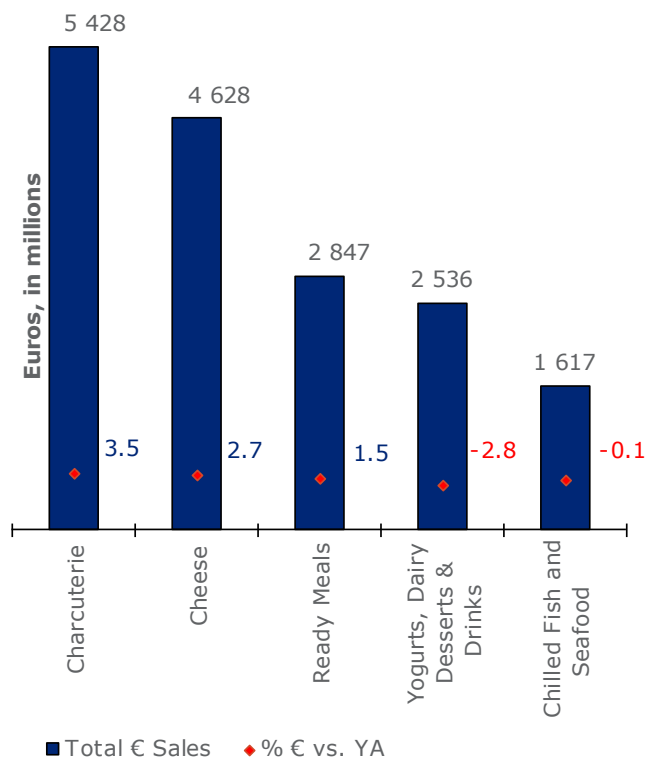


## TOP LOSERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



## TOP 5 CATEGORIES: EVOLUTION

Value sales (€) and % change versus a year ago



## CATEGORY INSIGHTS

- Charcuterie is still the primary contributor to chilled and fresh category performance in France. Growth remains strong, at 3.7% in value sales. Though prices increased in 2013, the category is now seeing deflation (-0.8% in June). Fresh sausages and drawn standard poultry are main contributors to growth.
- Q2 was stronger than Q1 for the cheese category. Though volume sales were flat during first months of 2014 (driven by less promotions), they recovered in Q2, largely due to Mediterranean and salad cheeses.
- Ready meal volume growth remains steady (+1.5% for both Q1 and Q2), largely due to the success of hot snacks and sandwiches.
- Yogurts and dairy desserts continue to struggle in Q2 (-0.7% for value sales), impacted by less promotions and deflation.

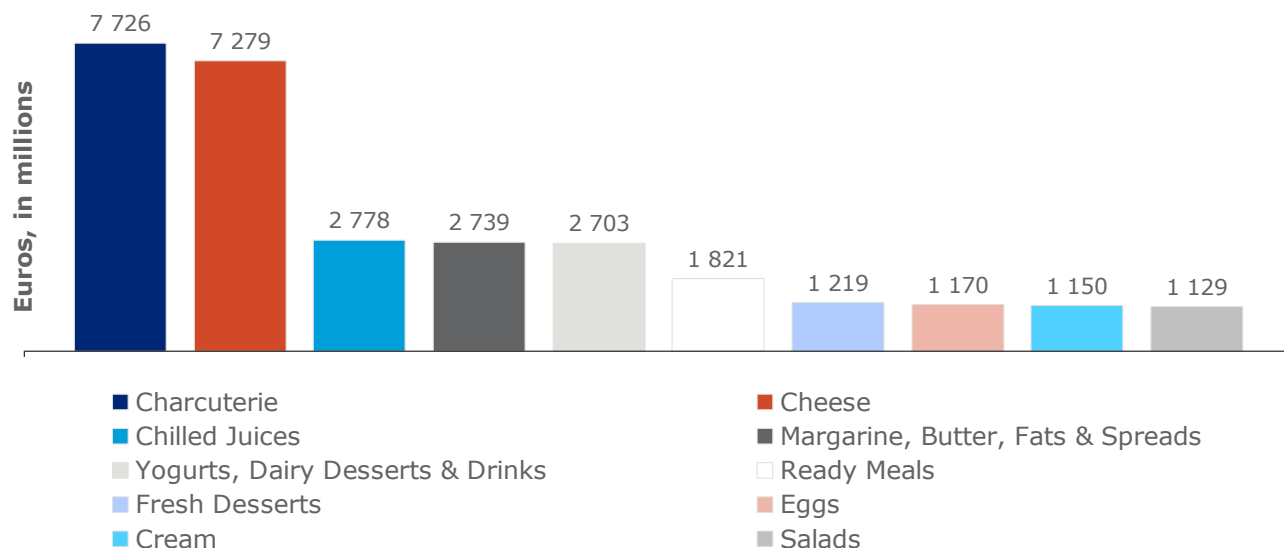
Source: IRI retail databases, period ending 29 June 2014





# Germany

## CATEGORY VALUE SALES IN THE LAST YEAR



| SHARE OF CHILLED AND FRESH VALUE FOR THE YEAR |       |
|---|-------|
| Charcuterie                                   | 24.7% |
| Cheese  | 23.6% |
| Chilled Juices                                | 9.0%  |
| Margarine, Butter, Fats & Spreads             | 8.9%  |
| Yogurts, Dairy Desserts & Drinks              | 8.8%  |
| Ready Meals                                   | 5.9%  |
| Fresh Desserts                                | 3.9%  |
| Eggs  | 3.8%  |
| Cream   | 3.7%  |
| Salads  | 3.7%  |
| Milk  | 3.2%  |
| Chilled Fish and Seafood                      | 0.7%  |
| Tofu / Soya                                   | 0.1%  |
| Chilled Dips and Sauces                       | 0.0%  |

## KEY TRENDS

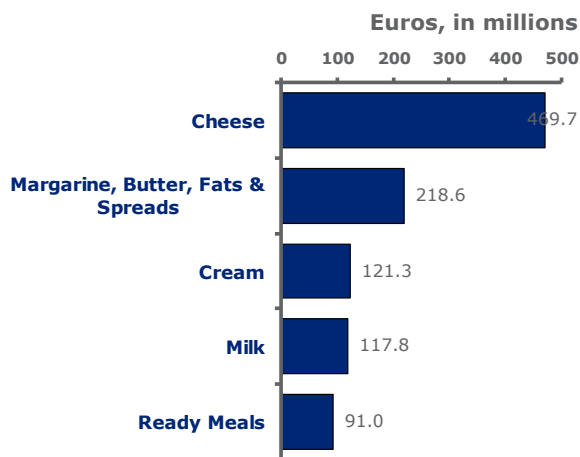
- In Germany, chilled and fresh recorded value growth of 2.6%, outpacing the combined rate of European countries studied for this report.
- Growth in hypermarkets contributes to 89.7% of the total growth in the chilled and fresh category, with an increase of 5.3% (contributing to 39.9% of value sales).
- Butter, fat spreads and cheese are contributing to positive sales growth. In contrast, charcuterie, margarine and salads are negatively impacting growth.
- Private label contributes an estimated 49% of value sales for chilled and fresh and shows considerable growth in value but declines in volume.
- An increase in promotions is fueling overall chilled and fresh value growth. Even off-promotion sales also show positive development.
- Hard discounters are experiencing the sharpest decline in chilled and fresh sales due to the decline of charcuterie, which has a very high share in the hard discounter's channel.

Source: IRI retail databases, period ending 29 June 2014

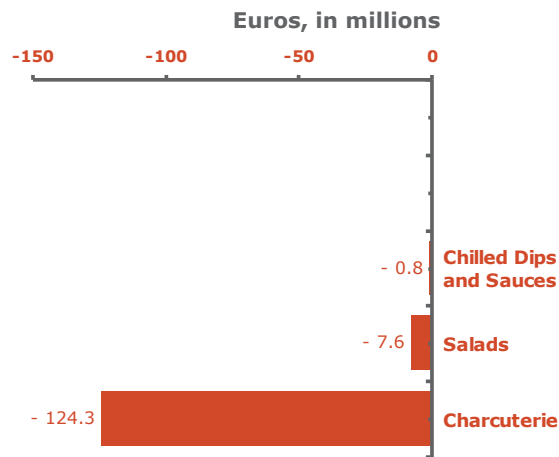


# Germany

## TOP WINNERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)

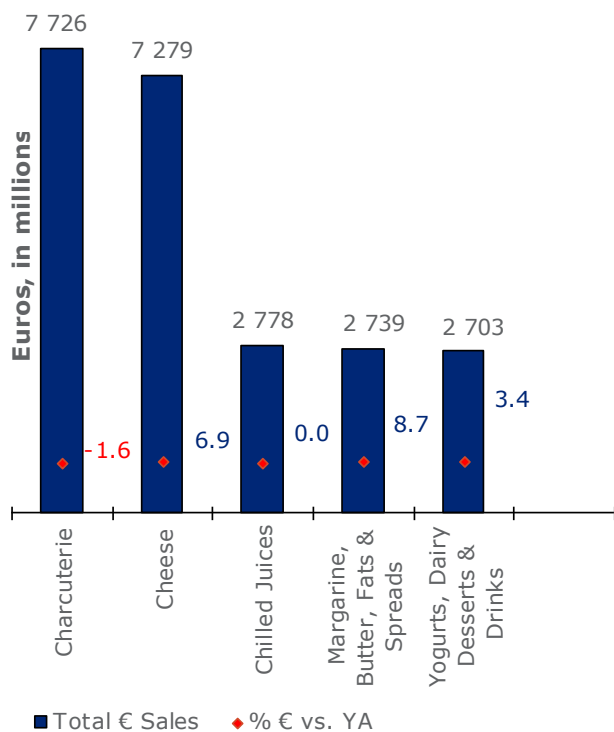


## TOP LOSERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



## TOP 5 CATEGORIES: EVOLUTION

Value sales (€) and % change versus a year ago

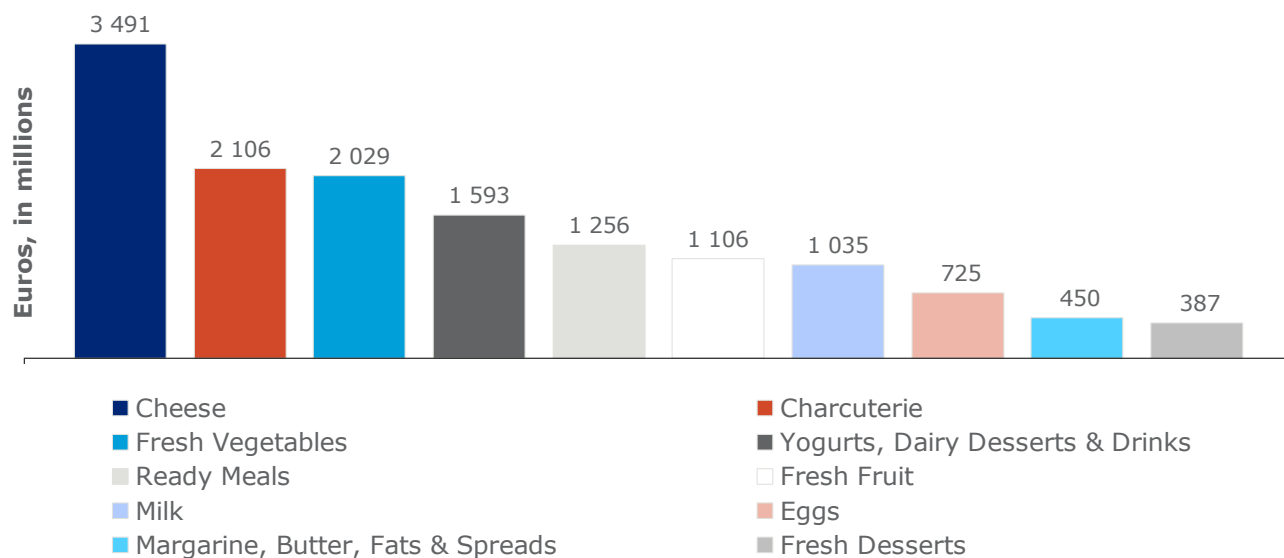


## CATEGORY INSIGHTS

- Cheese is the strongest performing chilled and fresh category in Germany, driven by semi-hard and curd cheese segments. Hypermarkets and discounters contributed 89.6% of overall sales for the quarter, up 6.8%
- Butter, fats and spreads enjoyed positive development in Q2 2014, driven mainly by the growth in private label and the growing popularity of butter mélanges (butter with added oil).
- Branded yogurts, dairy desserts and drinks saw value sales decline, since private label is contributing to overall category growth. In yogurt and quark there is a strong movement away from fruit and toward natural and higher fat levels.
- Chilled and unchilled charcuterie experienced declines the hard discounter channel, with weakness evidenced across both private label and branded solutions.
- Despite increased promotional activity, salads experienced a dip in sales, with losses in hypermarkets and supermarkets. Positive private label salads growth was not enough to offset overall category losses.

Source: IRI retail databases, period ending 29 June 2014

## CATEGORY VALUE SALES IN THE LAST YEAR



| SHARE OF CHILLED AND FRESH VALUE FOR THE YEAR |       |
|---|-------|
| Cheese  | 24.2% |
| Charcuterie                                   | 14.6% |
| Fresh Vegetables                              | 14.0% |
| Yogurts, Dairy Desserts & Drinks              | 11.0% |
| Ready Meals                                   | 8.7%  |
| Fresh Fruit                                   | 7.7%  |
| Milk  | 7.2%  |
| Eggs  | 5.0%  |
| Margarine, Butter, Fats & Spreads             | 3.1%  |
| Fresh Desserts                                | 2.7%  |
| Chilled Dips and Sauces                       | 1.1%  |
| Cream   | 0.5%  |
| Chilled Juices                                | 0.2%  |
| Tofu / Soya                                   | 0.0%  |

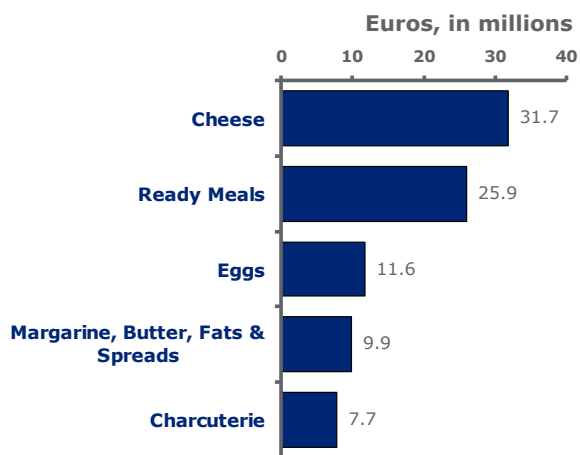
## KEY TRENDS

- For the first 6 months of 2014, FMCG sales came in lower versus prior year, but some signs of recovery stood out in the second quarter. Chilled and fresh volume is stronger than total grocery (+0.3% versus -0.6%), but chilled and fresh value growth lags the total grocery average (+1.1% and +1.9%, respectively).
- Among the most important categories of the market, cheese and charcuterie are experiencing positive growth (1.3% and 0.4%, respectively). Meanwhile, vegetables, fresh fruit and yogurt are experiencing negative value trends (down 5.1%, 5.8% and 2.3%, respectively).
- Fresh meat and fresh seasonings are experiencing significant increases in both volume and value. The increase for fresh meat has been driven by the shift of some products from random weight to fixed weight; whereas for fresh seasoning there is a noticeable increase of promotional pressure and an increase of the average volume price.
- The decline of the functional segment continues in the yogurt category (value down 15.2%; volume down 14.8%).

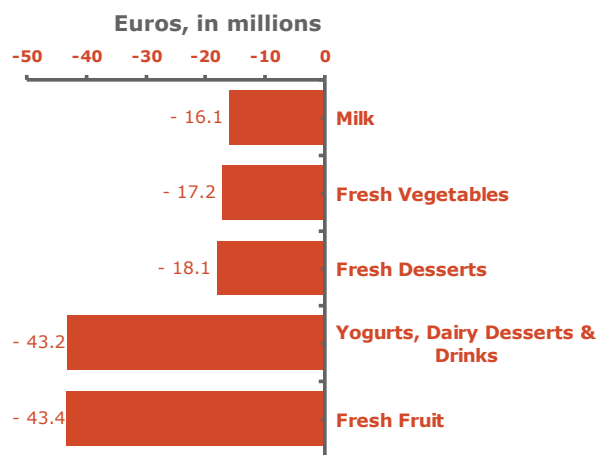
Source: IRI retail databases, period ending 29 June 2014



### TOP WINNERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)

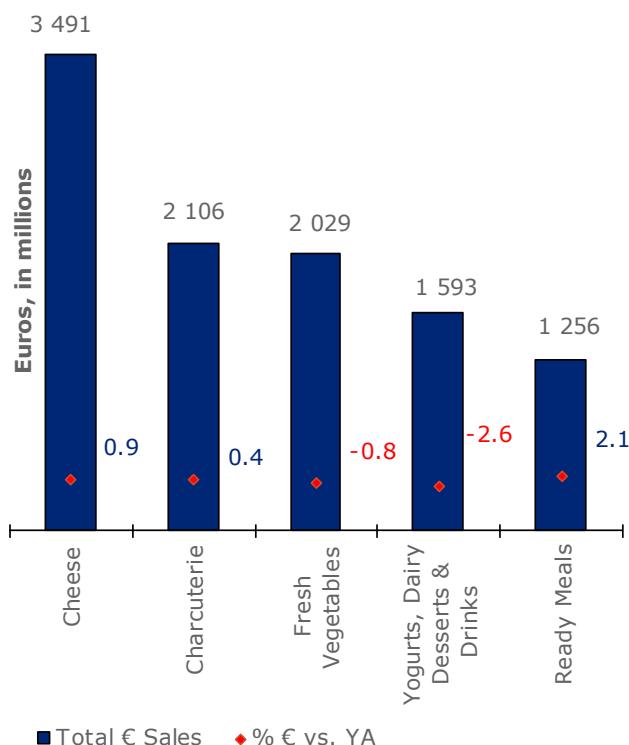


### TOP LOSERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



### TOP 5 CATEGORIES: EVOLUTION

Value sales (€) and % change versus a year ago



### CATEGORY INSIGHTS

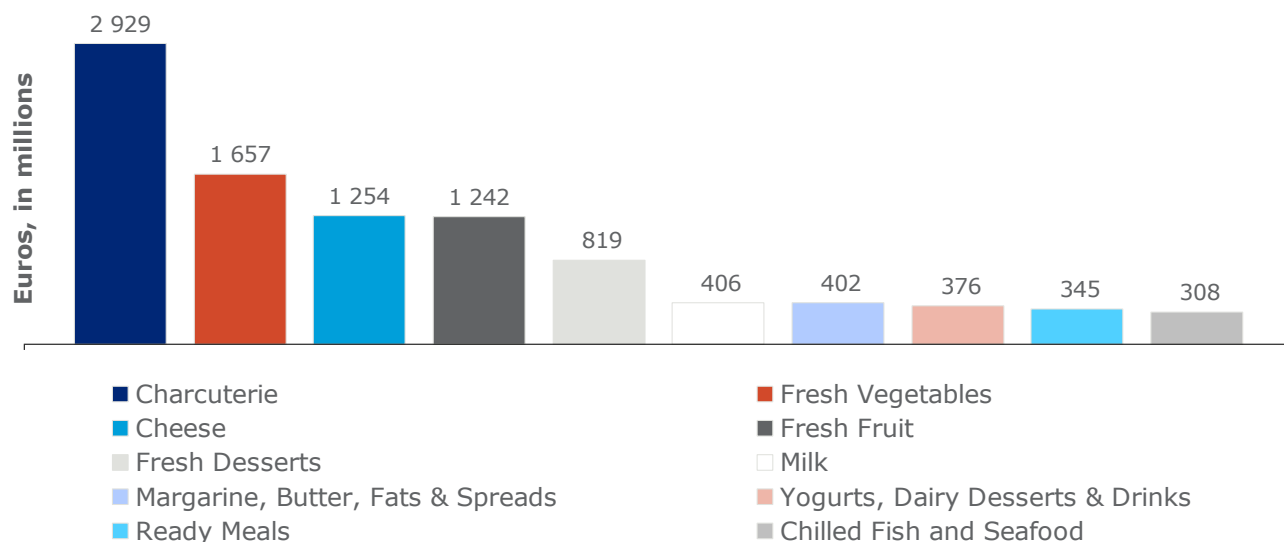
- Deflation is taking hold across a number of FMCG. In chilled and fresh, Q2 price was higher versus year ago(0.8%), driven primarily by chilled dips and sauces (up 4.2%).
- Private label has achieved a very high share of chilled and fresh value sales (28.3%, versus a FMCG average of 18.1%), and share is climbing.
- Promotional activity supports 20.9% of value sales (up 7.2% versus last year), but sales lift has slipped, due to lower price discounts.
- The categories with the highest promotional activity are fresh pasta, cheese, charcuterie and fresh fruits. In each of these categories, more than 30% of volume is sold on deal. Meanwhile, promotional effectiveness has slipped versus prior year, since price discounts are lower. This is true across most chilled and fresh categories.

Source: IRI retail databases, period ending 29 June 2014



# The Netherlands

## CATEGORY VALUE SALES IN THE LAST YEAR



| SHARE OF CHILLED AND FRESH VALUE FOR THE YEAR |       |
|---|-------|
| Charcuterie                                   | 27.9% |
| Fresh Vegetables                              | 15.8% |
| Cheese  | 12.0% |
| Fresh Fruit                                   | 11.8% |
| Fresh Desserts                                | 7.8%  |
| Milk  | 3.9%  |
| Margarine, Butter, Fats & Spreads             | 3.8%  |
| Yogurts, Dairy Desserts & Drinks              | 3.6%  |
| Ready Meals                                   | 3.3%  |
| Chilled Fish and Seafood                      | 2.9%  |
| Salads  | 2.7%  |
| Eggs  | 2.2%  |
| Chilled Juices                                | 1.3%  |
| Cream   | 0.6%  |
| Chilled Dips and Sauces                       | 0.3%  |
| Tofu / Soya                                   | 0.0%  |

### KEY TRENDS

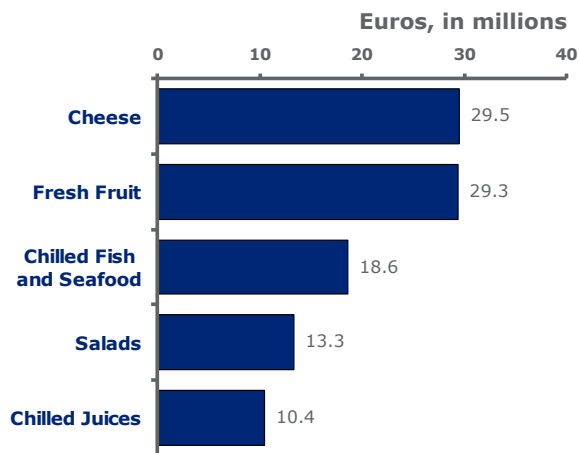
- In the Netherlands, total FMCG moving annual total (MAT) value sales are stable .
- The chilled and fresh category is critical to the supermarkets channel, with sales accounting for 42.9% of channel sales.
- The importance of the category is compounded by chilled and fresh's growth (+0.3%), which is above the level of the growth of the total supermarket sales.
- All chilled fresh categories show growth except the two biggest ones, meat and fresh vegetables.
- Meat shows a decline because consumers, in general, eat less meat than before. In contrast, poultry and vegetarian meals, which are perceived to be healthier, are experiencing growth.
- Vegetables are experiencing falling value sales, mainly because of deflationary prices.

Source: IRI retail databases, period ending 29 June 2014

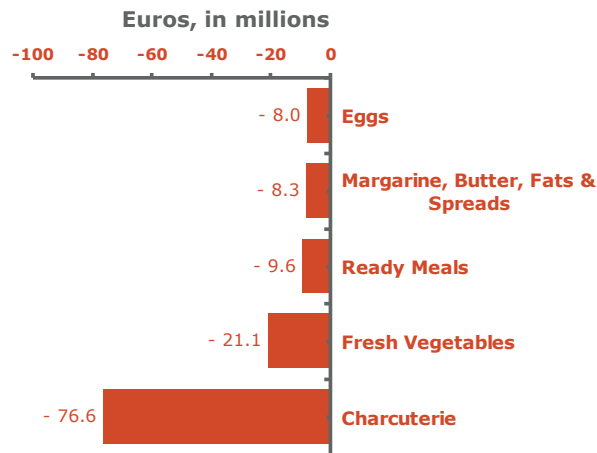


# The Netherlands

## TOP WINNERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)

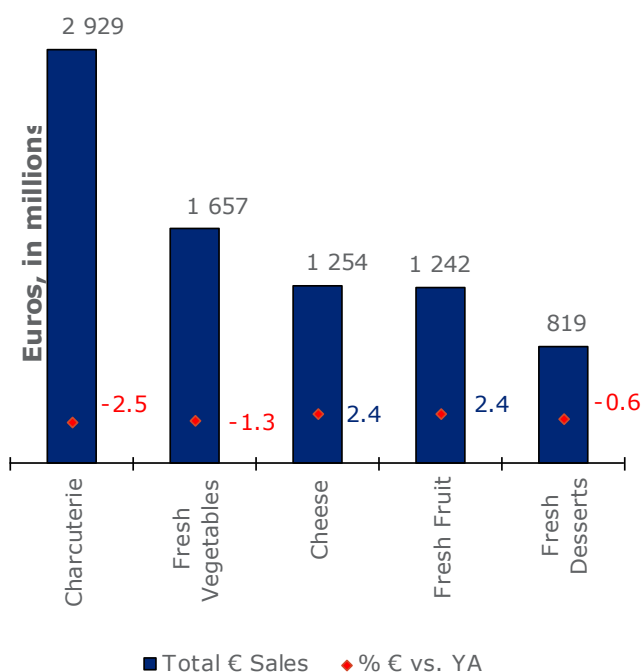


## TOP LOSERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



## TOP 5 CATEGORIES: EVOLUTION

Value sales (€) and % change versus a year ago



## CATEGORY INSIGHTS

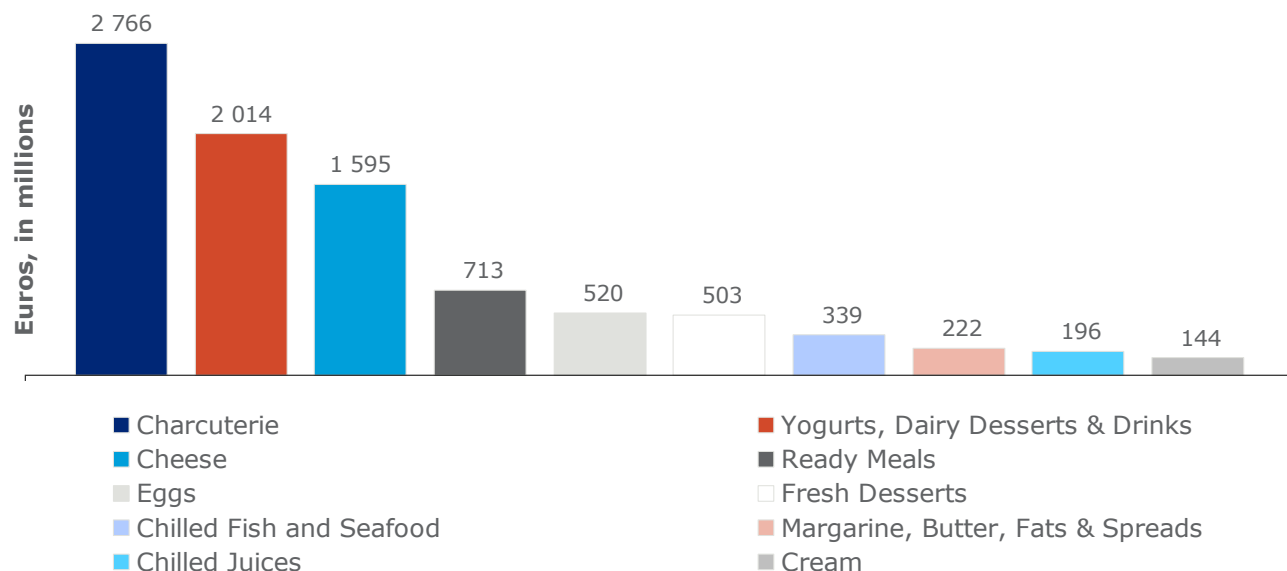
- Cheese sales increased (+2.4% value in Q2 2014 ), driven by foreign cheese (e.g., mozzarella and goat cheese), which are increasingly used in salads.
- Bananas, berries and exotic fruits are driving growth within the fresh fruits sector.
  - There is a price war on bananas, leading to price deflation. However, because of all the attention this segment now receives, volume is on the increase.
  - The season for strawberries was good, which helped support growth. Other berries, like blueberries, show a positive sales index, fueled by trends around healthier eating (e.g., antioxidants).
  - Within exotic fruits, avocados and mangos are performing well. The introduction of ready-to-eat mangos is a key driver of growth, with convenience formats showing particular strength
- Fresh fish has returned to a positive trend after a bad year (the salmon scandal).

Source: IRI retail databases, period ending 29 June 2014



# Spain

## CATEGORY VALUE SALES IN THE LAST YEAR



| SHARE OF CHILLED AND FRESH VALUE FOR THE YEAR |       |
|---|-------|
| Charcuterie                                   | 30.0% |
| Yogurts, Dairy Desserts & Drinks              | 21.8% |
| Cheese  | 17.3% |
| Ready Meals                                   | 7.7%  |
| Eggs  | 5.6%  |
| Fresh Desserts                                | 5.4%  |
| Chilled Fish and Seafood                      | 3.7%  |
| Margarine, Butter, Fats & Spreads             | 2.4%  |
| Chilled Juices                                | 2.1%  |
| Cream   | 1.6%  |
| Chilled Dips and Sauces                       | 1.5%  |
| Milk  | 0.4%  |
| Salads  | 0.4%  |

## KEY TRENDS

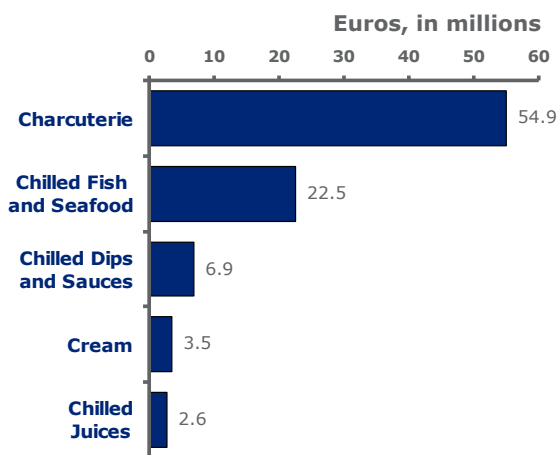
- Spain has positive economic news, as the GDP grew 1.2% in Q2 2014 versus prior year. Growth outpaced the European average.
- The yogurt and eggs categories both experienced sales declines in Q2. Charcuterie enjoyed a sizable increase for the quarter. Chilled fish and seafood also posted value sales growth.
- Private label share of chilled and fresh sales is on the decline, as prices have increased and the price gap between private label and brands has closed slightly.
- Promotional activity has risen strongly across chilled and fresh during the past year, but it is still generally lower than the FMCG average of 22.0%.

Source: IRI retail databases, period ending 29 June 2014

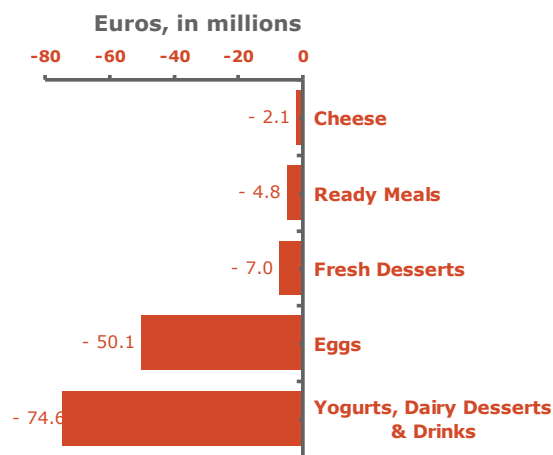


# Spain

## TOP WINNERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)

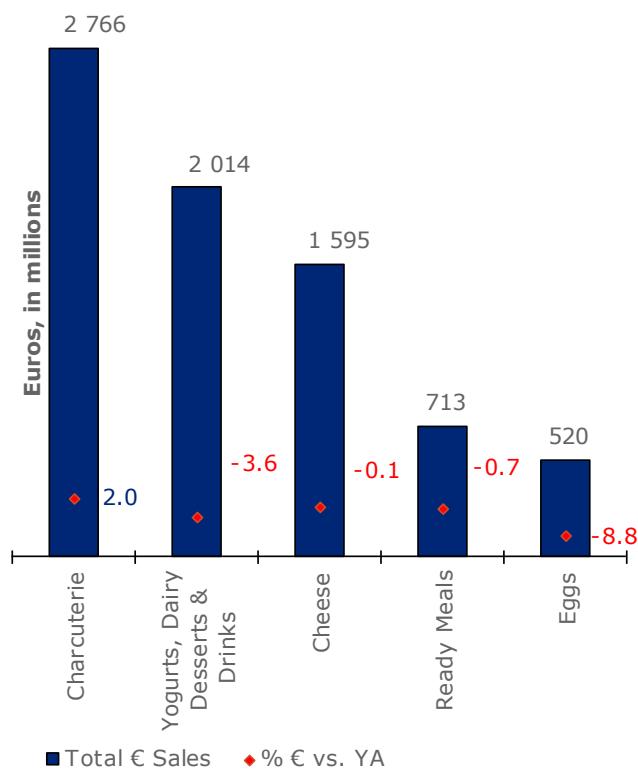


## TOP LOSERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



## TOP 5 CATEGORIES: EVOLUTION

Value sales (€) and % change versus a year ago



## CATEGORY INSIGHTS

- Charcuterie continues to enjoy value growth, driven by the national brands. Meanwhile, private label charcuterie has experienced declines during the past year.
- All segments of the yogurt segment declined across all channels. The basic segment, usually the strongest, reversed historical trends and posted sales declines for the quarter. Liquid and creamy yogurt segments experienced sales increases, but they remain secondary segments.
- In contrast to the general chilled and fresh trend, eggs experienced heavy declines in Q2, driven by declines in private label. Meanwhile, promotional activity increased across sharply within the supermarket channel. Hypermarkets have also seen promotional activity climb.

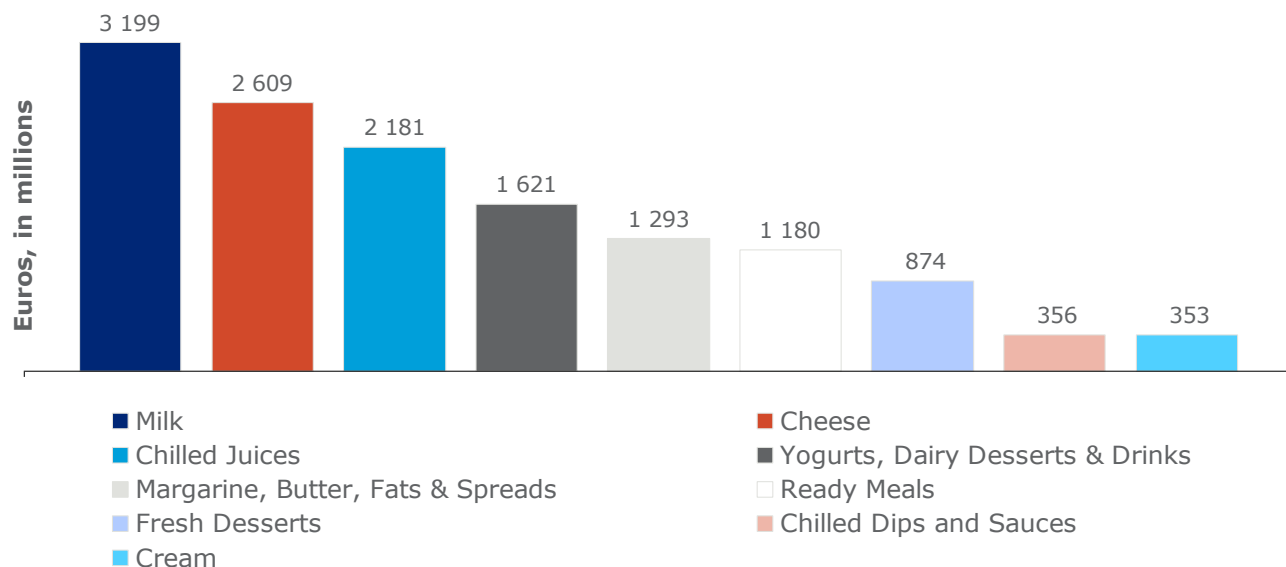
Source: IRI retail databases, period ending 29 June 2014





# The United Kingdom

## CATEGORY VALUE SALES IN THE LAST YEAR



| SHARE OF CHILLED AND FRESH VALUE FOR THE YEAR |       |
|---|-------|
| Milk  | 23.4% |
| Cheese  | 19.1% |
| Chilled Juices                                | 16.0% |
| Yogurts, Dairy Desserts & Drinks              | 11.9% |
| Margarine, Butter, Fats & Spreads             | 9.5%  |
| Ready Meals                                   | 8.6%  |
| Fresh Desserts                                | 6.4%  |
| Chilled Dips and Sauces                       | 2.6%  |
| Cream   | 2.6%  |

### KEY TRENDS

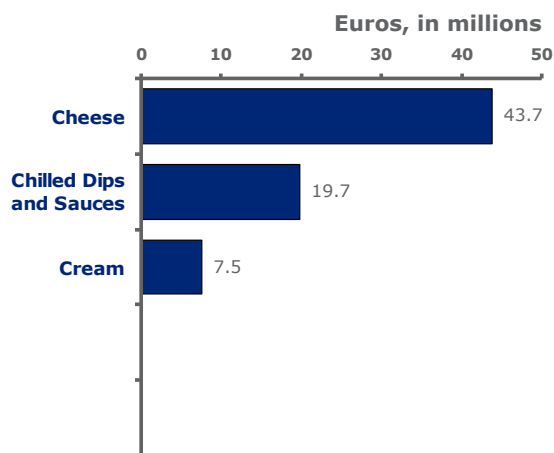
- The chilled and fresh market, which remained buoyant throughout the depths of the economic crisis, has for the first time slipped into decline in the UK (down 0.2%). This is against a background of continued economic pressure(although the recession has technically ended), with GDP declining by €55k, despite continued population growth.
- Milk is of key strategic importance to UK retailers, as both the main footfall driver in the chilled aisle and also the most price sensitive of all grocery categories.
- As such, milk’s decline of 1.0% value this quarter has implications for the whole chilled and fresh market. The percentage of volume sold on deal has increased alarmingly, from 19.5% in Q2 2014 to 34.5% in Q2 2014, driven by deeper deals. As a result, volume has increased but because the category has been deflated, value has fallen. To exacerbate the situation still further, there have also been fewer new launches in the market, which traditionally have been able to drive the average price of milk.

Source: IRI retail databases, period ending 29 June 2014

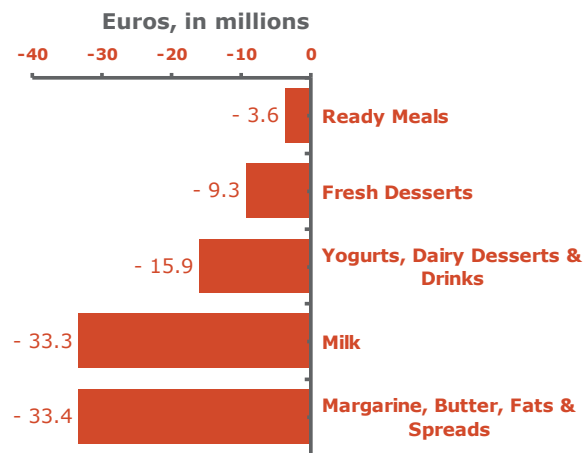


# The United Kingdom

## TOP WINNERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)

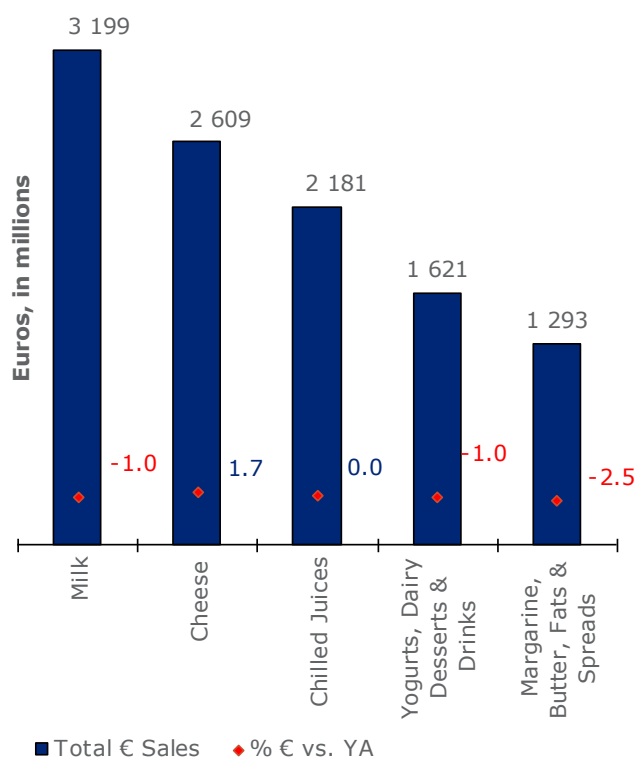


## TOP LOSERS: VALUE SALES CHANGE VERSUS A YEAR AGO (€)



## TOP 5 CATEGORIES: EVOLUTION

Value sales (€) and % change versus a year ago



## CATEGORY INSIGHTS

- The only sector to experience heavier value declines than milk is the ailing margarine, butter, fats & spreads category, which declined 2.5% last quarter, on a year-over-year basis. Both base and promotional sales declined.
- Cheese has grown 1.7% in the last year (+€43.7m), and Q2 2014 posted year-over-year growth 2.5%. Meanwhile, volume declined. Value growth was driven by price increases and shallower discounts.
- The margarine, butter, fats and spreads category continues its decline, exacerbated by reduced base sales. Furthermore, new launches have contributed significantly less to the category this year.
- Chilled juices value sales increased 0.2% during the last year, but this quarter sales have declined, with promotional and base sales losses. The category is very promotionally reliant (68.7% of volume was sold on deal in the last year), and any dip in promotional support heavily impacts total category performance.

Source: IRI retail databases, period ending 29 June 2014

# Final Notes

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## Notes on category definitions for countries

Due to the diverse products found in individual countries across this market it was necessary to consolidate the available data into the categories in this report. In some cases it wasn't always possible to align products across all 6 countries hence the need to highlight any anomalies in the report. Those exceptions are listed below:

### Eggs

- The UK data in this report does not include this category.

### Margarine, butter, fats and spreads

- The UK data in this report does not include fats in this category.
- The Spain data in this report does not include fats in this category.

### Tofu/soya

- The UK data in this report does not include this category.
- The Spain data in this report does not include this category.

### Chilled fish and seafood

- The UK data in this report does not include this category.
- The Italy data in this report does not include this category.

### Charcuterie

- The UK data in this report does not include this category.

### Fresh vegetables

- The UK data in this report does not include this category.
- The Spain data in this report does not include this category.
- The Germany data in this report does not include this category.

### Fresh fruit

- The UK data in this report does not include this category.
- The Spain data in this report does not include this category.
- The Germany data in this report does not include this category.

# Resources

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To gain insight into opportunities across specific categories, segments, channels or retailers, contact your IRI client service representative regarding custom analyses leveraging the following resources:

- **InfoScan Census**<sup>®</sup> is a syndicated retail tracking service that enables manufacturers and retailers to acquire industry insights used to make better business decisions. InfoScan Census utilises the data that IRI collects from grocery, drug, and mass merchandise retailers to provide the most comprehensive and accurate syndicated data offering in the FMCG sector. With access to accurate, granular detail by category, geography, measure, and time period, clients have the tools needed to develop marketing and sales strategies based on product performance, distribution, and promotion responsiveness. All data about chilled and fresh comes from InfoScan Census.
- **IRI Consulting** provides strategic insights and advice leveraging a variety of data sources, predictive analytics, enabling technologies, and business analyses to help FMCG manufacturers and retailers address significant sales and marketing issues effectively.

## FOR MORE INFORMATION

Please contact Sarah Pittock, Insight Director, Business Insights, IRI at [Sarah.Pittock@IRIworldwide.com](mailto:Sarah.Pittock@IRIworldwide.com) or +44 (0)782 577 0209 with questions or comments about this report.

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