AIM
EUROPEAN BRANDS ASSOCIATION

ACCESS TO BRANDS

Data source:

KANTAR WORLDPANEL

GfK

europanel

Prepared for:

British Brands Group

THE RESEARCH

11 European countries:

- Belgium
- Czech Republic
- Denmark
- France
- Germany
- Italy
- Poland
- Portugal,
- Spain
- The Netherlands
- UK

Consumer panels* data

134 000 shoppers

3 years evolution

3 channels :

- Hypermarkets
- Supermarkets
- Discount (Hard and soft)

Top 5 retailers in each country

- 33 retailers among which
- 9 international retailers active in 2 or more countries

Analysing

- Retail concentration
  - At national level
  - At regional level
  - At channel level
- Private Labels
  - Assortment (skus)
  - Value
  - Volume
- Launches activity
  - By launch type
  - By top 5 retailers
  - For brands and private labels

*

Data source: Kantar Worldpanel, GFk, Europanel

TOP 5 RETAILERS IN EACH COUNTRY

30 ON 55 OF TOP RETAILERS ARE INTERNATIONAL (54,5%)

Belgium	**Colruyt**	**Delhaize**	**Carrefour**	**Aldi**	**Lidl**
NL	Albert Heijn	Jumbo Food	SuperUnie	Aldi	Lidl
Germany	Edeka	Schwarz (Kaufland/Lidl)	Aldi	Rewe	Metro (Real)
France	Carrefour	Casino	E.Leclerc	Auchan	Intermarché
Italy	Coop	Conad	Carrefour	Esselunga	Auchan
Spain	Mercadona	Carrefour	Dia	Eroski	Auchan
Portugal	Sonae	Jeronimo Martins	Lidl	Minipreço	Intermarché
UK	Tesco	Asda	Sainsbury's	Morrisons	The Co-operative
Denmark	Coop	Dansk Supermarked	Dagrofa	Reitan	Lidl
Poland	Auchan	Carrefour	Tesco	Jeronimo Martins	Schwarz (Kaufland/Lidl)
Czech Rep	Schwarz (Kaufland/Lidl)	Rewe	Ahold	Tesco	Coop

Data source: Kantar Worldpanel, GFk, Europanel

DEFINITIONS

FMCG

Grocery:- Foods (excluding fresh) + beverages + household products + health& beauty

A **<u>selection of up to 79 consistent categories*</u>** for the new product analyses (see section 3 of report for categorie review)

RETAILERS

Top 5 retailer groups , regrouping all banners active in the country

Limits in panel data availability for several indicators in:

- Czech Rep,
- Denmark,
- France,
- Italy,
- Poland,
- Portugal

LAUNCH TYPES

Innovation

A new brand or sub-brand

Renovation

Launches with a change in size, flavour, variant but already existing brand and sub-brand

* Category Coverage: B (78), CZ(74), DK (64), F (77), D (79), I (73), NL (79), Pol (77), Pt (60), Sp (67), UK (75)

Data source: Kantar Worldpanel, GFk, Europanel

1, Retail Concentration

2, Private Labels and assortment

3, Launch activities, listing, distribution

Data source: Kantar Worldpanel, GFk, Europanel

TOP LINES SUMMARY

- Concentration of top 5 retailers in UK is at 70% of grocery sales in 2015. It dropped following – mostly - the gain of market share of hard discounters, Lidl and Aldi. All top 5 retailers lost also shoppers,

- The pattern of competition is quite specific: Tesco is 12% ahead of N° 2 (Asda), leading strongly in 7 out of 10 regions, sometimes with a 20% gap with the N° 2 (East England)

- 85% of households shop at Tesco, 71% at Asda, 68% at Sainsbury's, 62% at Morrisons. British household appear to trade at more store on average than in other countries (5 stores during the year for grocery purchases)

- Regional concentration spread: from 67,6% to 72,6% - 5 concentration points between regions Lower concentration in highest sales region (London; 67,6%, representing 20% of sales)

- Tesco leads in all regions but the North East where Asda gets its best share (22%).

- Supermarkets clearly lead in terms of shopper base and sales market share even if it loses market share. Discount grows their share (+2,7) as well as internet (+2,3)

- Tesco is the only retailer active in the 4 top grocery channels (80% of the grocery market), explaining its overall market share

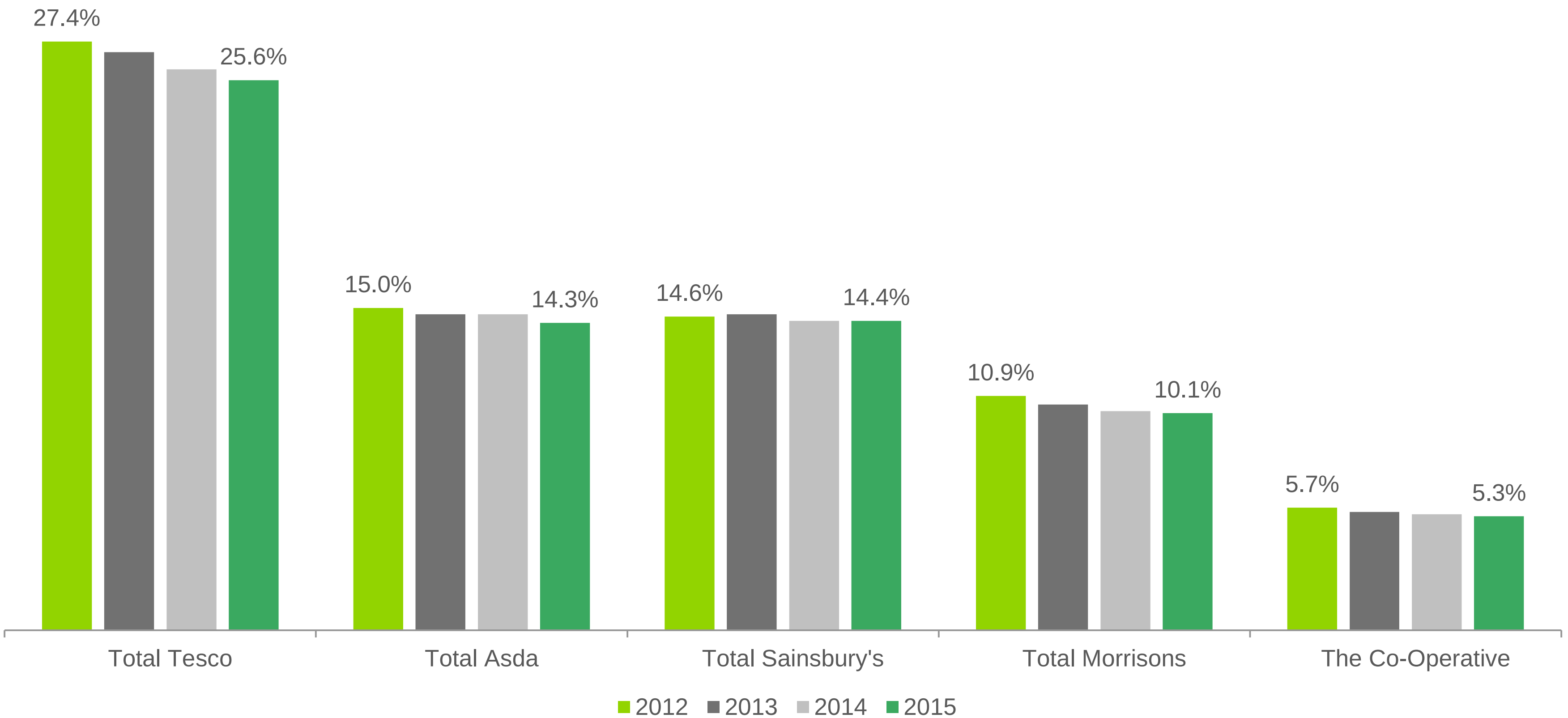
Data source: Kantar Worldpanel, GFk, Europanel

CONCENTRATION AT NATIONAL LEVEL OF THE TOP 5 GROUPS

Loss of market share to Aldi and Lidl (+3,3%), Waitrose and Marks & Spencer

UK / top 5 Retailers			
2012	2013	2014	2015
73,6	72,3	70,8	69,7

Share of market in value – Total FMCG excluding fresh food – total country -

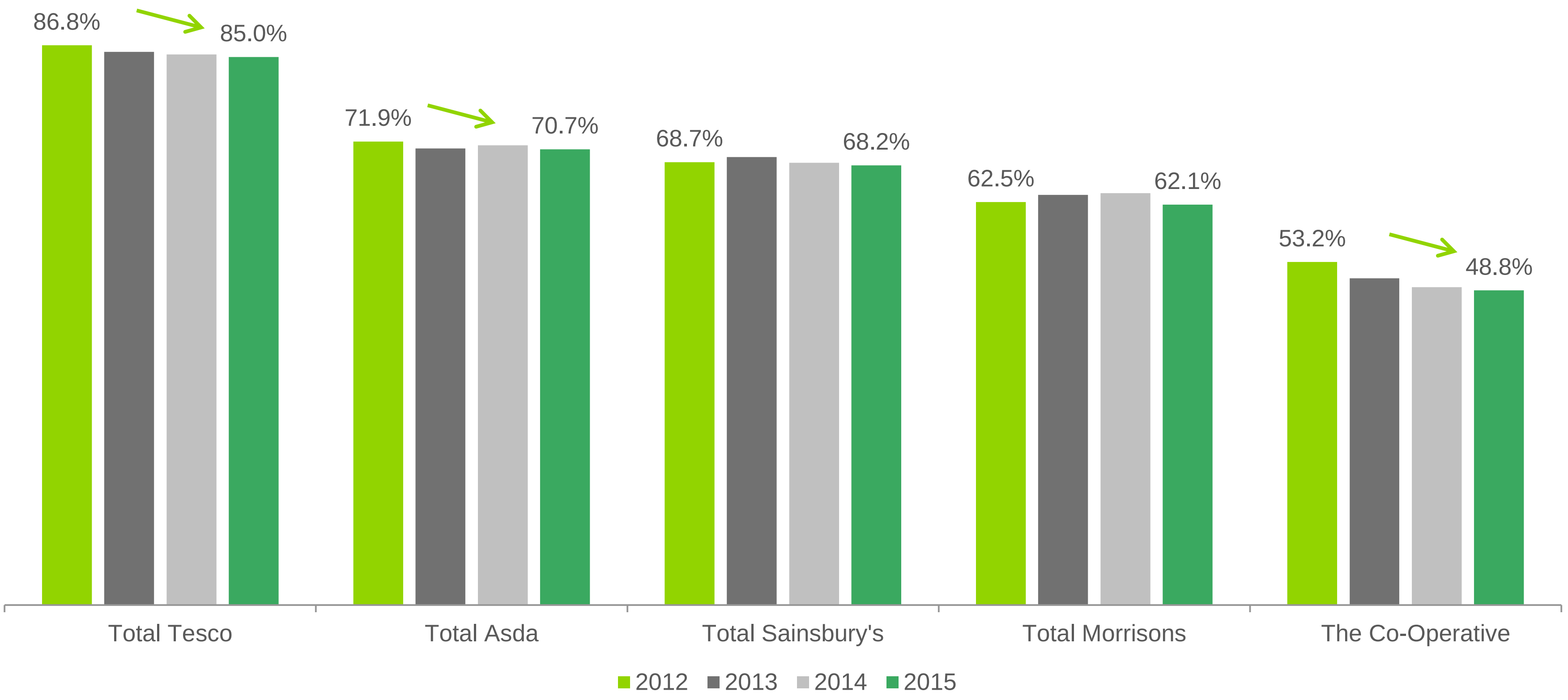


Data source: Kantar Worldpanel, GFk, Europanel

PENETRATION BY RETAILER

All top 5 retailers lose shoppers, biggest lost among the 2 leaders

Penetration rate– Total FMCG excluding fresh food – Top 5 retailers - total country -



Data source: Kantar Worldpanel, GFk, Europanel

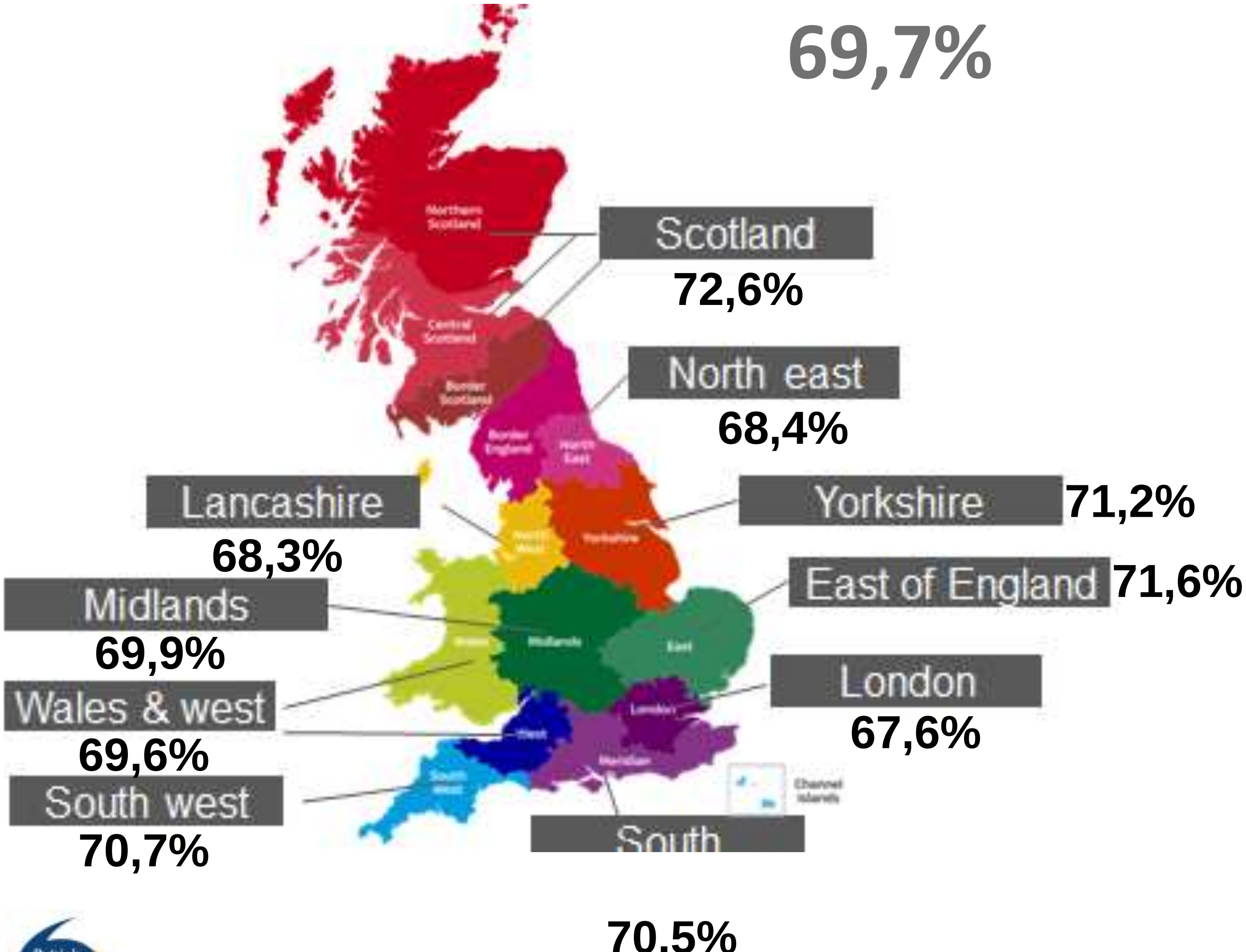
CONCENTRATION AT REGIONAL LEVEL OF THE TOP 5 GROUPS

Regional concentration spread: from 67,6% to 72,6% - 5 concentration points between regions
Lower concentration in highest sales region (London; 67,6%, representing 20% of sales)

% share in value – top 5 retailers by region – 2015 -

Total UK

69,7%

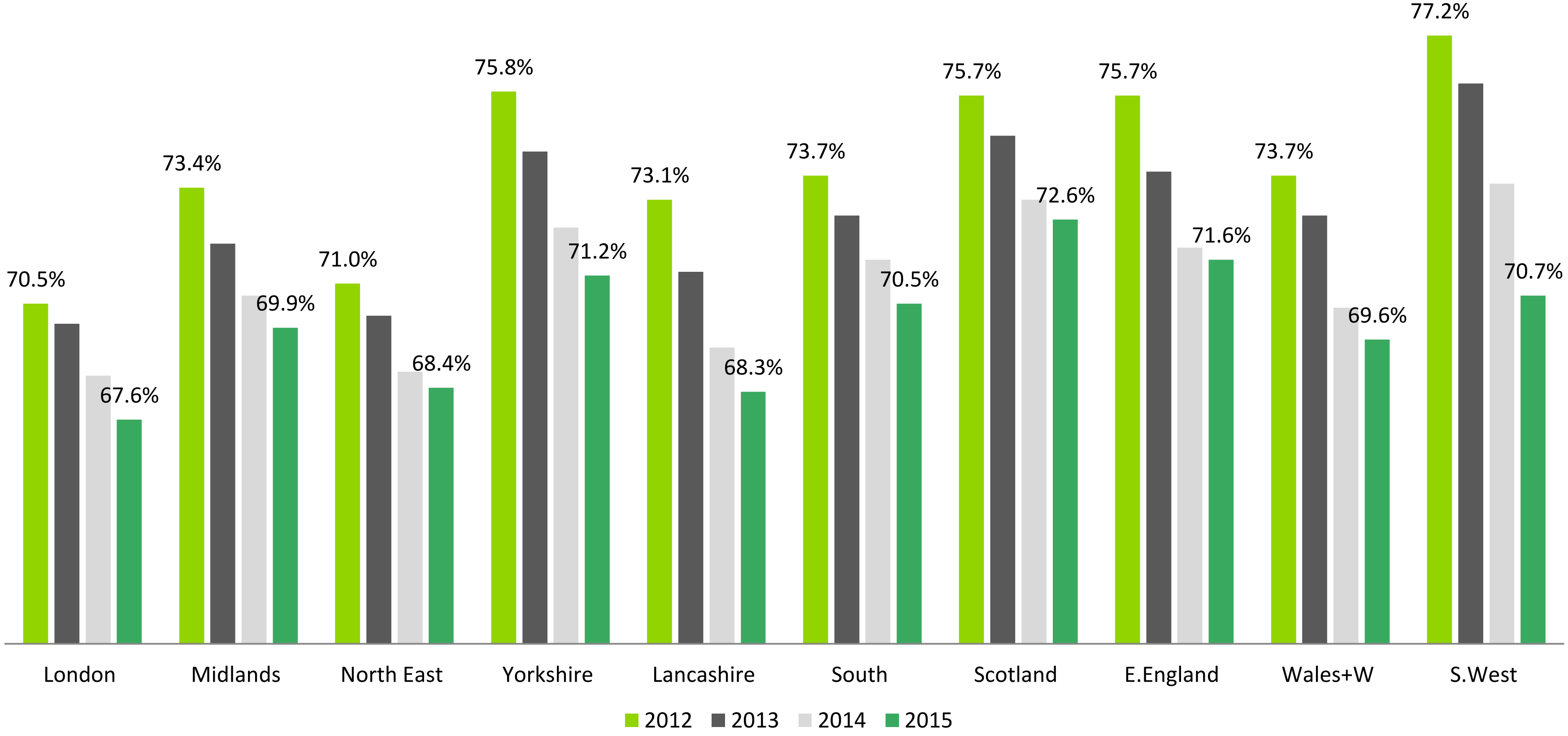


Share of market value	Year 2015
Total	**100,0**
London	20,6
Midlands	14,3
North East	4,5
Yorkshire	10,0
Lancashire	10,2
South	11,2
Scotland	9,5
East of England	7,9
Wales & West	8,6
SouthWest	3,2

CONCENTRATION AT REGIONAL LEVEL OF THE TOP 5 GROUPS

Higher than average drop of concentration in Yorkshire, Lancashire and S.West even if Yorshire and S West still present higher level of concentration

% share in value – top 5 retailers by region – 2015 -

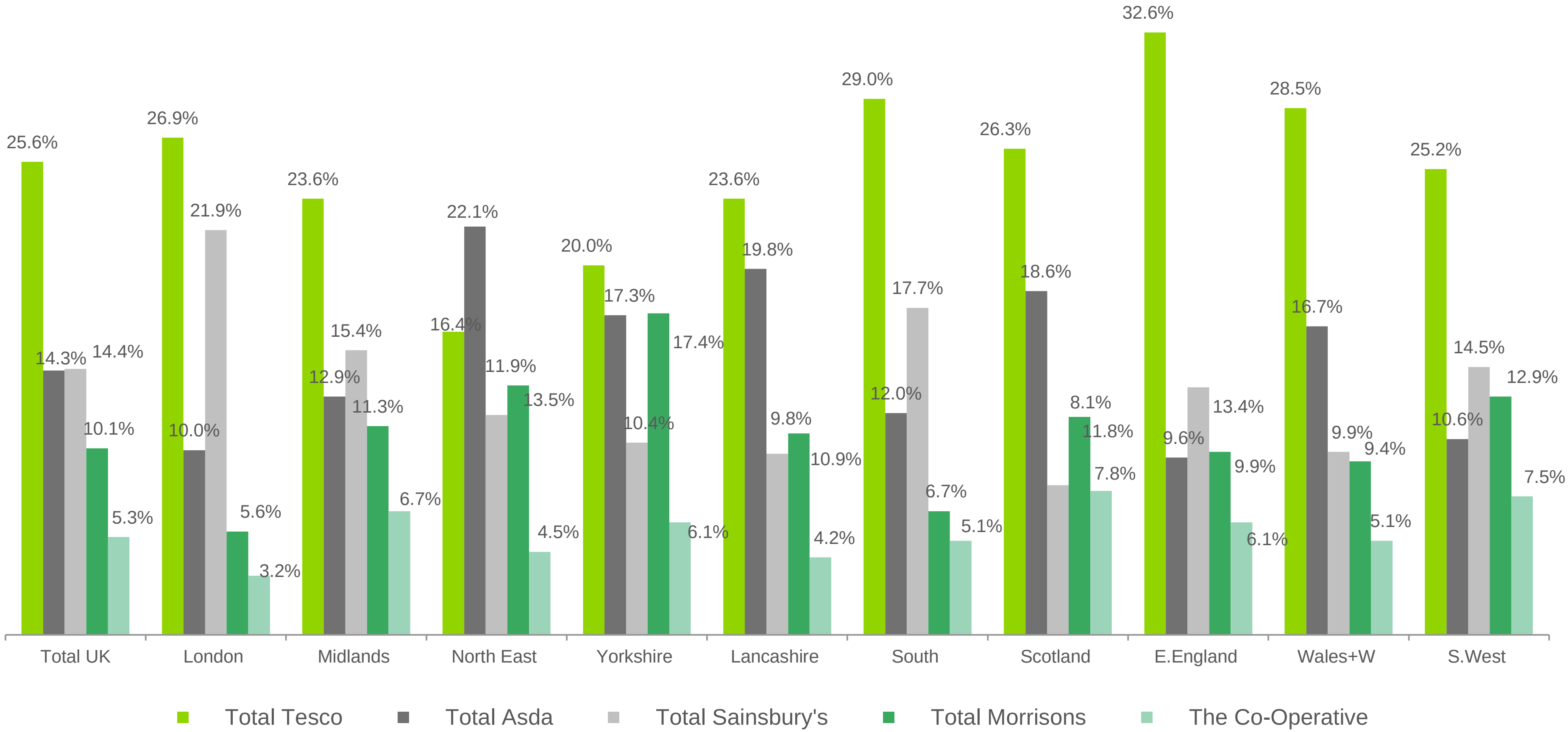


Data source: Kantar Worldpanel, GFk, Europanel

CONCENTRATION AT REGIONAL LEVEL - SHARE OF TOP 5 RETAILERS

- Tesco leads in all regions but the North East where Asda gets its best share (22%)
- Tesco generally dominates competition with 10 share points ahead of all others nationally, going up to 20 points gap in East England

% share in value – top 5 retailers by region – 2015 -

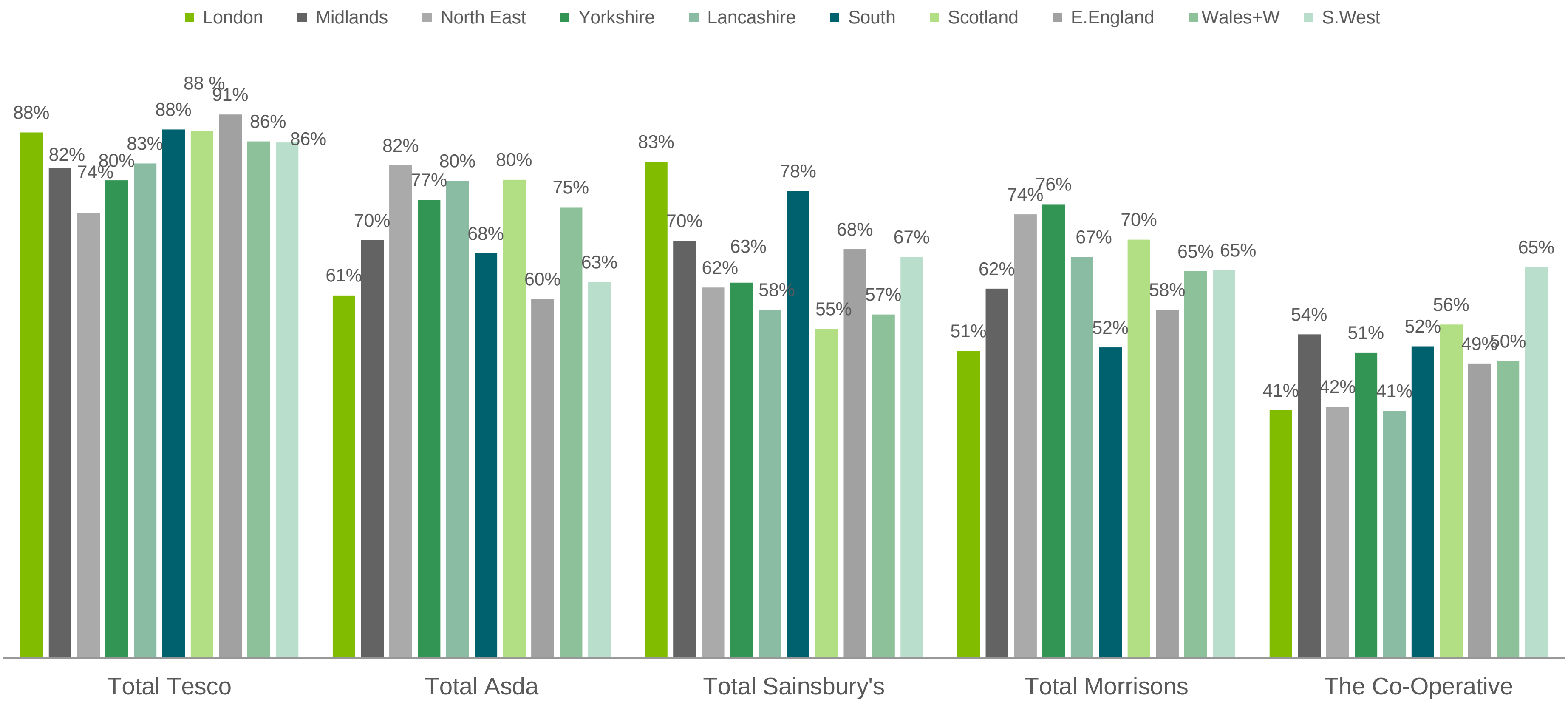


Data source: Kantar Worldpanel, GFk, Europanel

PENETRATION BY RETAILER BY REGION CAN VARY SIGNIFICANTLY

- In some regions, households shop at more stores than in other regions (ie Scotland, S. West
- Similar shopper base (ie Tesco 88% in South, Scotland, London) do not necessarily lead to similar share of sales (ie Tesco:29% in South, 26% in Scotland)

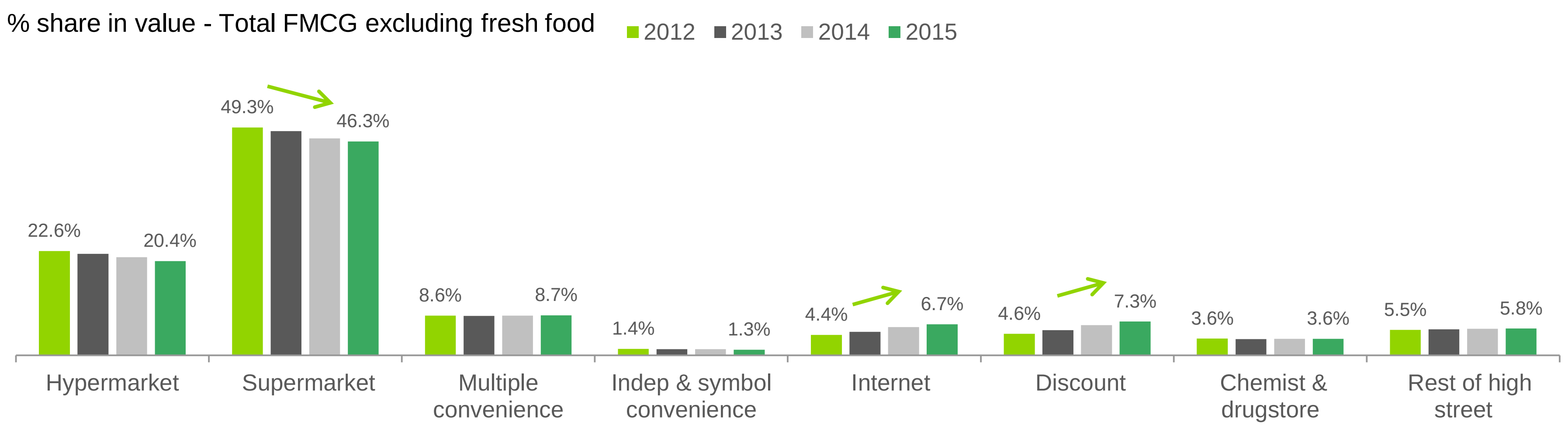
Penetration rate by retailer by region – UK - 2015



Data source: Kantar Worldpanel, GFk, Europanel

SHARE AND PENETRATION BY CHANNEL

Supermarkets lead clearly in terms of shopper base and sales market share even if it loses share
Growth of Discount (+2,3) and internet (+2,3) share in grocery sales



Penetration rate: On average shopping at 5 channels	2012	2013	2014	2015
Hypermarket	82,0%	80,9%	81,0%	80,3%
Supermarket	98,0%	97,9%	97,9%	97,9%
Multiple convenience	77,0%	74,5%	74,6%	74,0%
Indep & symbol convenience	38,4%	39,4%	38,1%	40,1%
Internet	22,0%	23,9%	26,0%	27,2%
Discount	58,4%	62,0%	66,9%	69,2%
Chemist & drugstore	68,4%	65,6%	63,8%	62,9%
Rest of high street	79,8%	78,2%	78,1%	78,0%

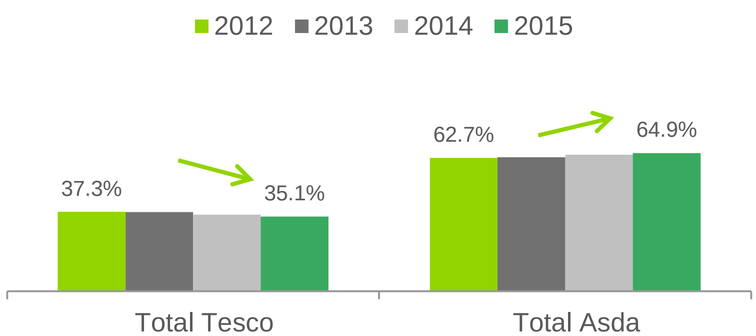
Data source: Kantar Worldpanel, GFk, Europanel

CONCENTRATION AT CHANNEL LEVEL

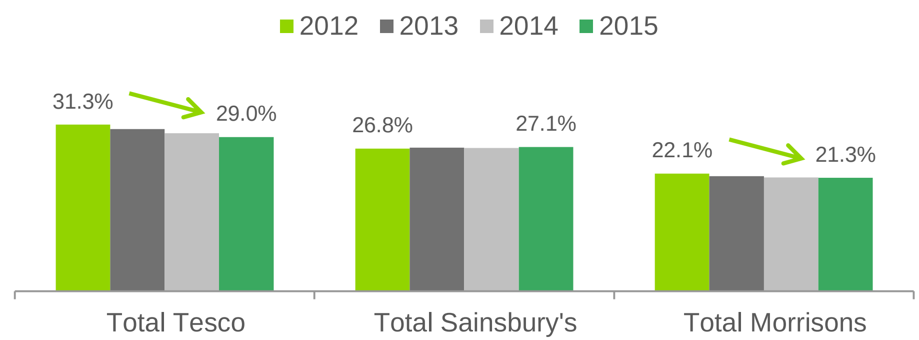
Tesco is the only retailer active in the 4 top grocery channels, explaining its overall market share

Share of market in value – Total FMCG excluding fresh food -

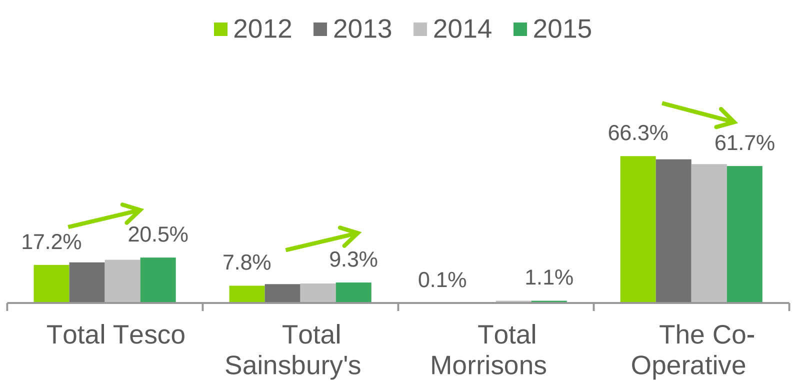
Hypers: 20,4% sales share in 2015



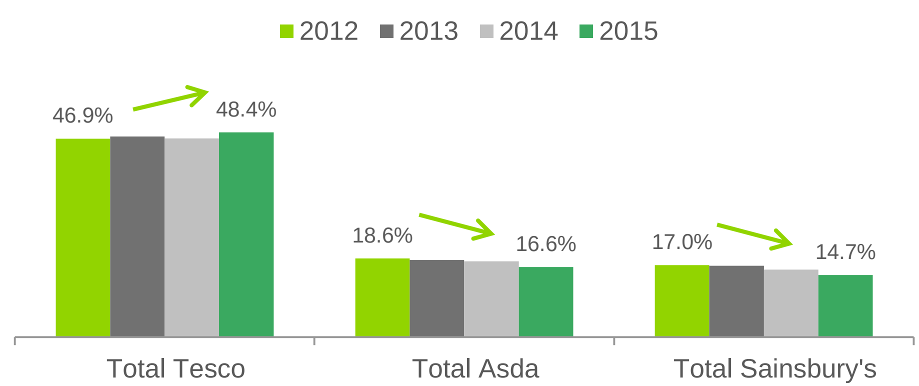
Supers: 46,3% sales share in 2015



Multi convenience: 8,7% sales share in 2015



Internet: 6,7% sales share in 2015

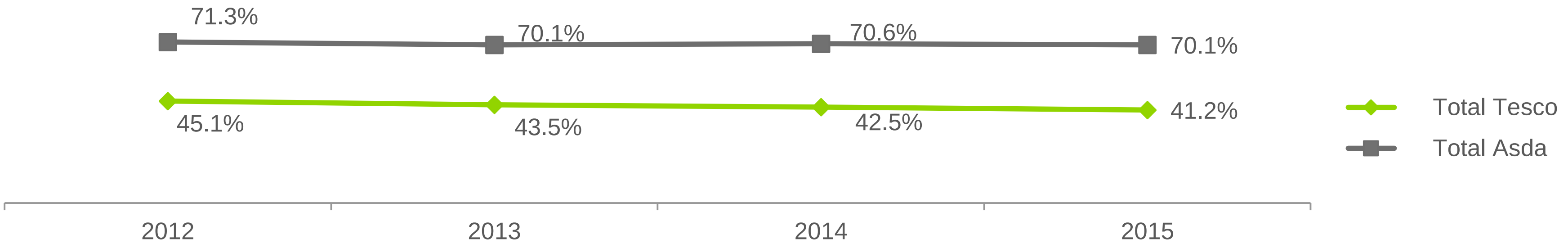


Data source: Kantar Worldpanel, GFk, Europanel

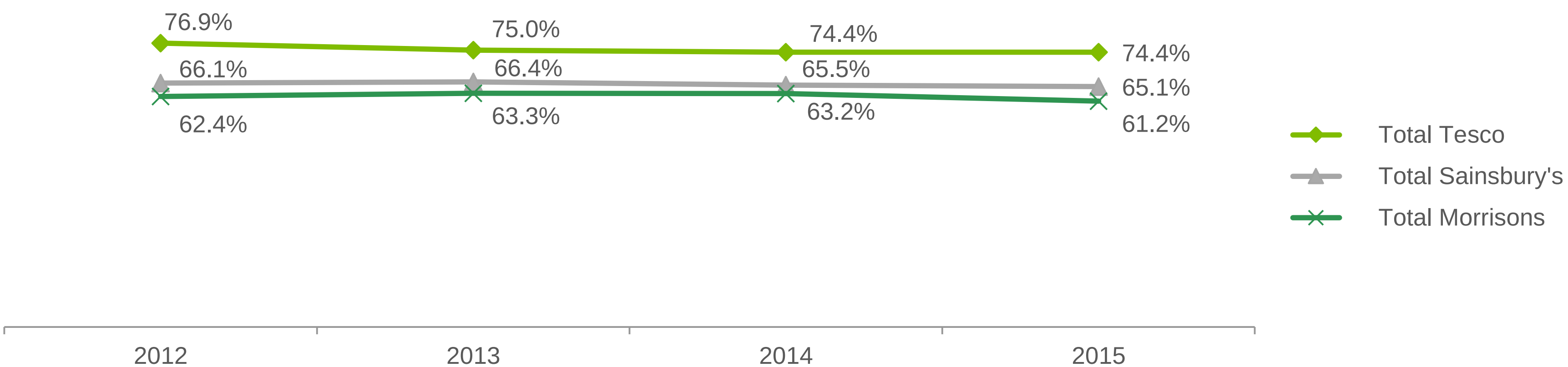
PENETRATION BY RETAILER BY CHANNEL

Penetration rate – Total FMCG excluding fresh food -

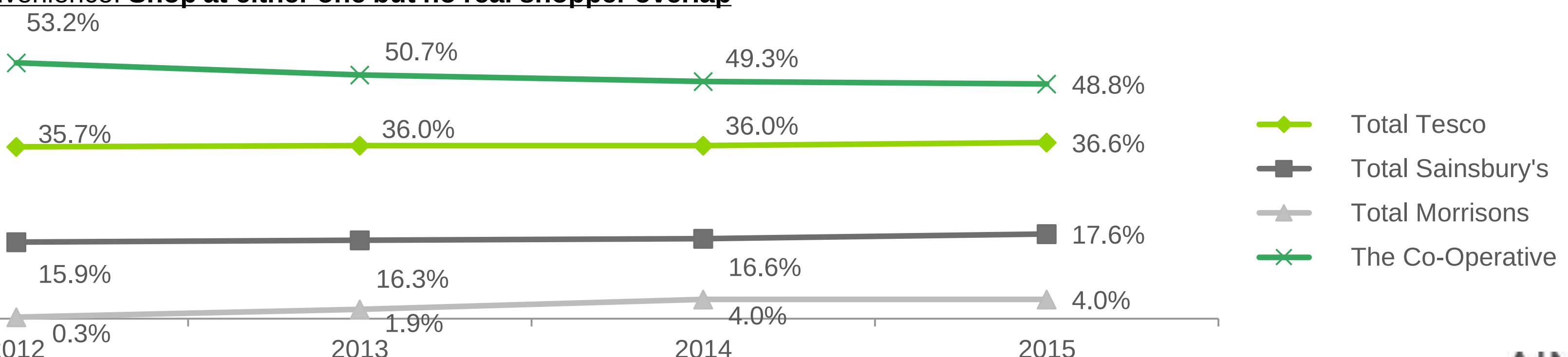
Hypers: **little shopper overlap between the 2 main players - most shop at one retailer**



Supers: **more shopper overlap between 3 main players – usually shop at 2**



Multiple convenience: **Shop at either one but no real shopper overlap**

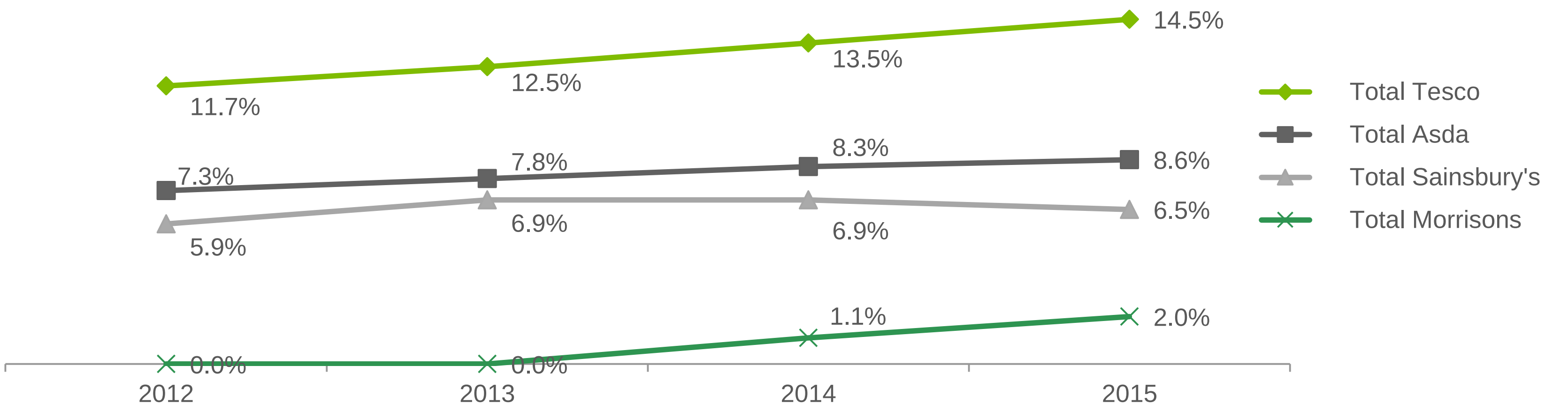


Data source: Kantar Worldpanel, GFk, Europanel

PENETRATION BY RETAILER BY CHANNEL

Penetration rate – Total FMCG excluding fresh food -

Internet



1, Retail Concentration

2, Private Labels and assortment

3, Launch activities, listing, distribution

Data source: Kantar Worldpanel, GFk, Europanel

TOP LINES SUMMARY

- The level of private labels ranks at 43% for the assortment (% of skus); 40,5% in terms of sales, 51,8% of volume, nationwide in 2015
- In terms of PL assortment, the differences by regions spread from 46% in Lancashire to 50 % in the South West,
- In terms of value sales, the regional spread is higher, from 38% to 53%, reflecting therefore difference in PL price across regions
- Among the top 5, the highest PL assortment is found at Sainsbury's, also leading in PL sales
- Discounters have 59% of their assortment made of Private labels: they are listing many brands for short period of time, trying to attract shoppers and build loyalty via these « brands events ». This high brand assortment is therefore not the result of a willingness to develop long term relationship with brands…
- Private labels price level is 22% cheaper than brands on average (2015). This is one of the lowest price differential when comparing with other countries, a likely result of premium PL development in the UK.

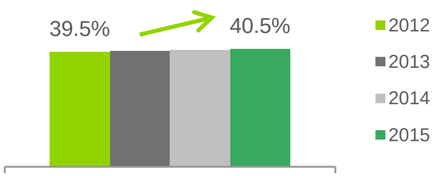
Data source: Kantar Worldpanel, GFk, Europanel

PRIVATE LABELS SHARES AT NATIONAL LEVEL

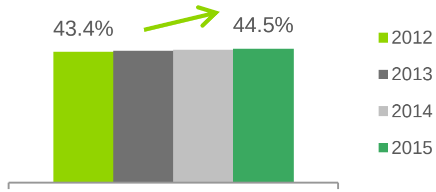
Overall drop of Private labels assortment with various impact on sales depending categories

- Main category (food & beverage) drop of PL assortment and volume, increase in value sales (price effect)
- Increase of PL sales for household products; decrease for Health & Beauty

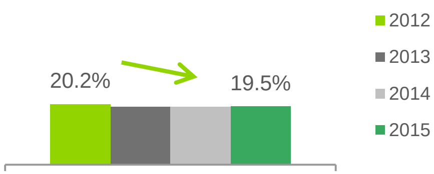
% share **<u>in value</u>** Private Label



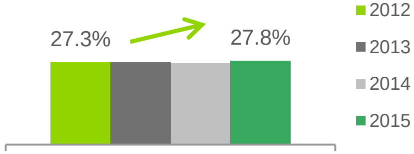
Grocery & Beverages



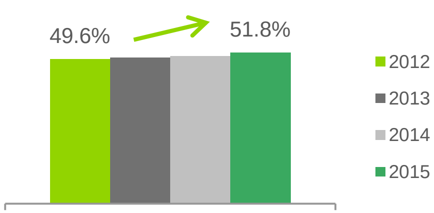
Health & Beauty



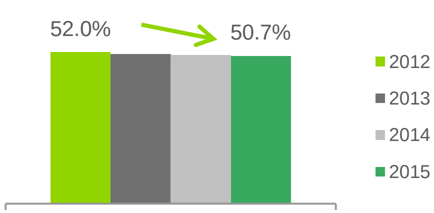
Household products



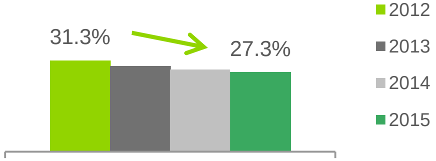
% share **<u>in volume</u>** (packs) Private label



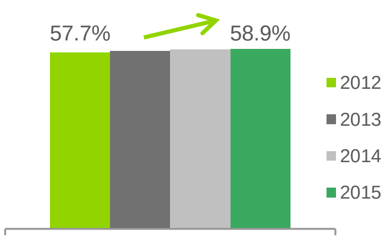
Grocery & Beverages



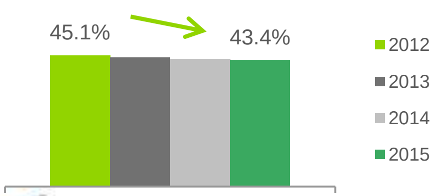
Health & Beauty



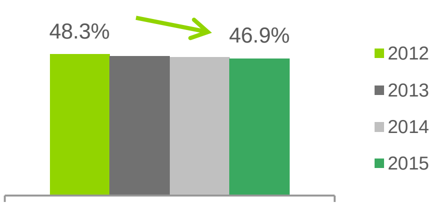
Household products



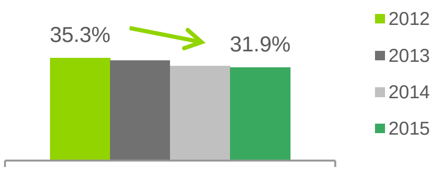
% share **<u>in assortment (</u>**skus) Private label



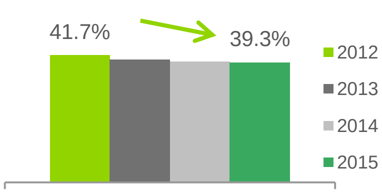
Grocery & Beverages



Health & Beauty



Household products

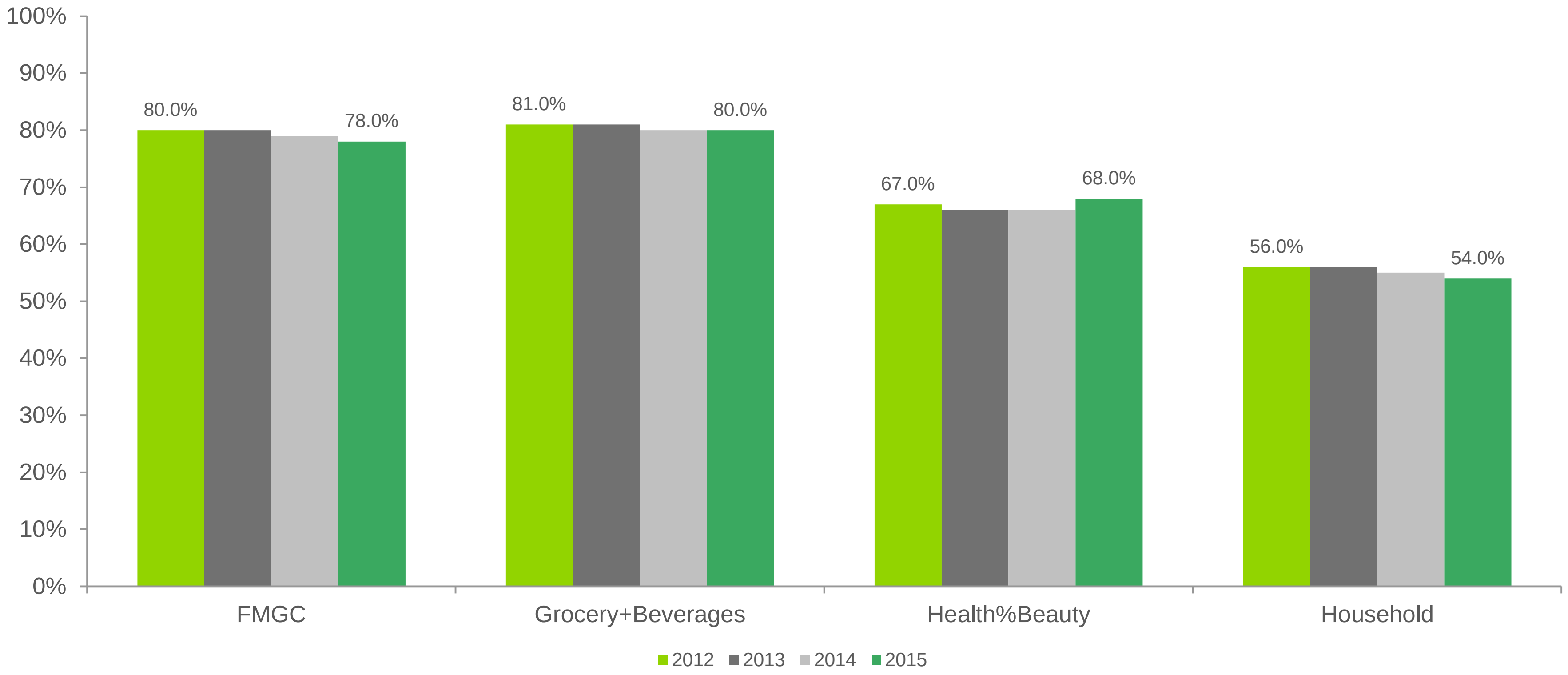


FMCG excluding fresh food

Data source: Kantar Worldpanel, GFk, Europanel

PRIVATE LABELS PRICE INDEX COMPARED TO BRANDS PRICE

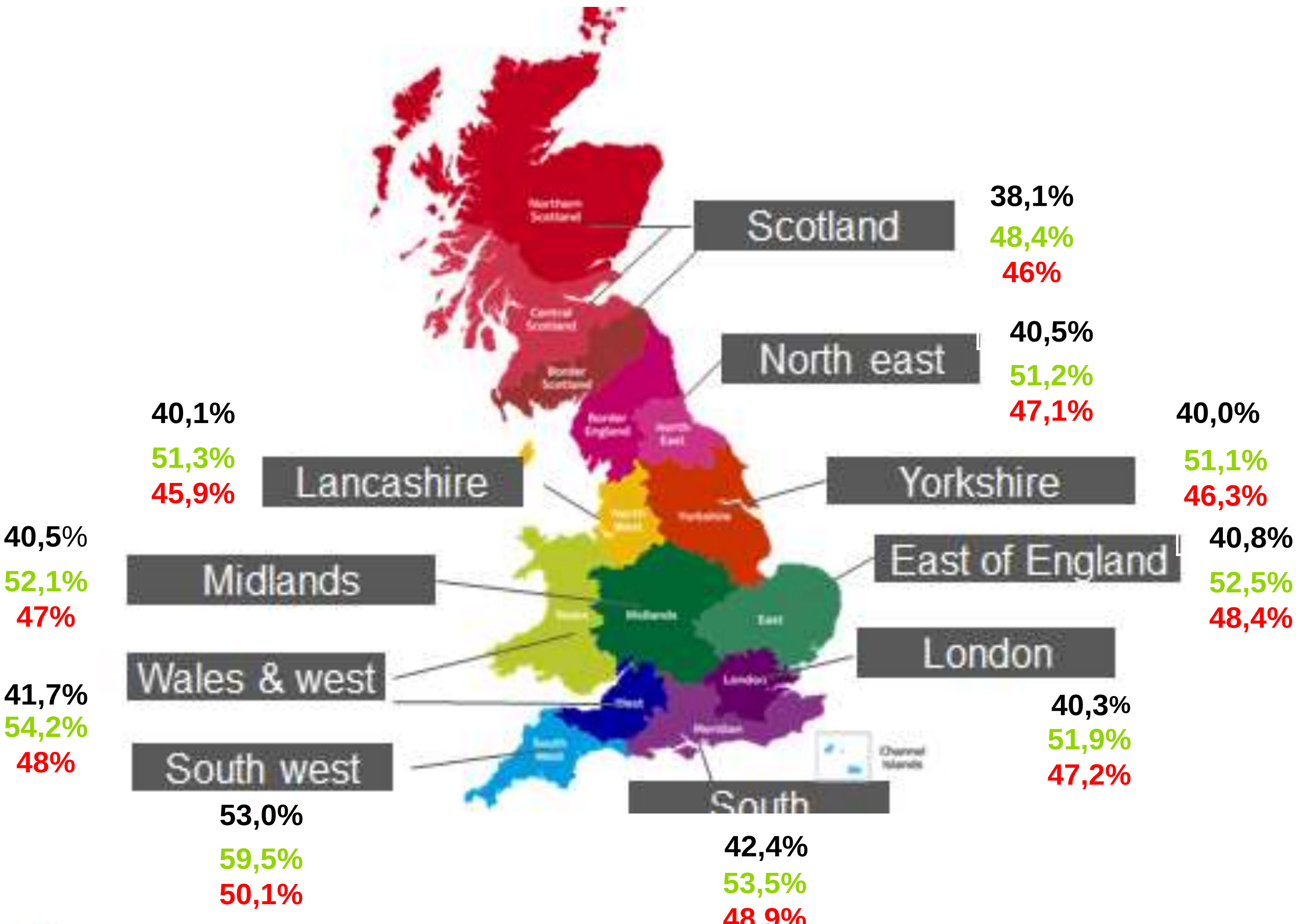
PL 22% CHEAPER THAN BRANDS ON AVERAGE (2015) – Bigger price difference for non food categories



Data source: Kantar Worldpanel, GFk, Europanel

PRIVATE LABELS SHARES AT REGIONAL LEVEL

- Regional concentration spread: from 38,1% (Scotland) to 53% (South West) in terms of value. Difference in volume and assortment highlights regional price difference for private labels



Total UK

40,5%

51,8%

43,4%

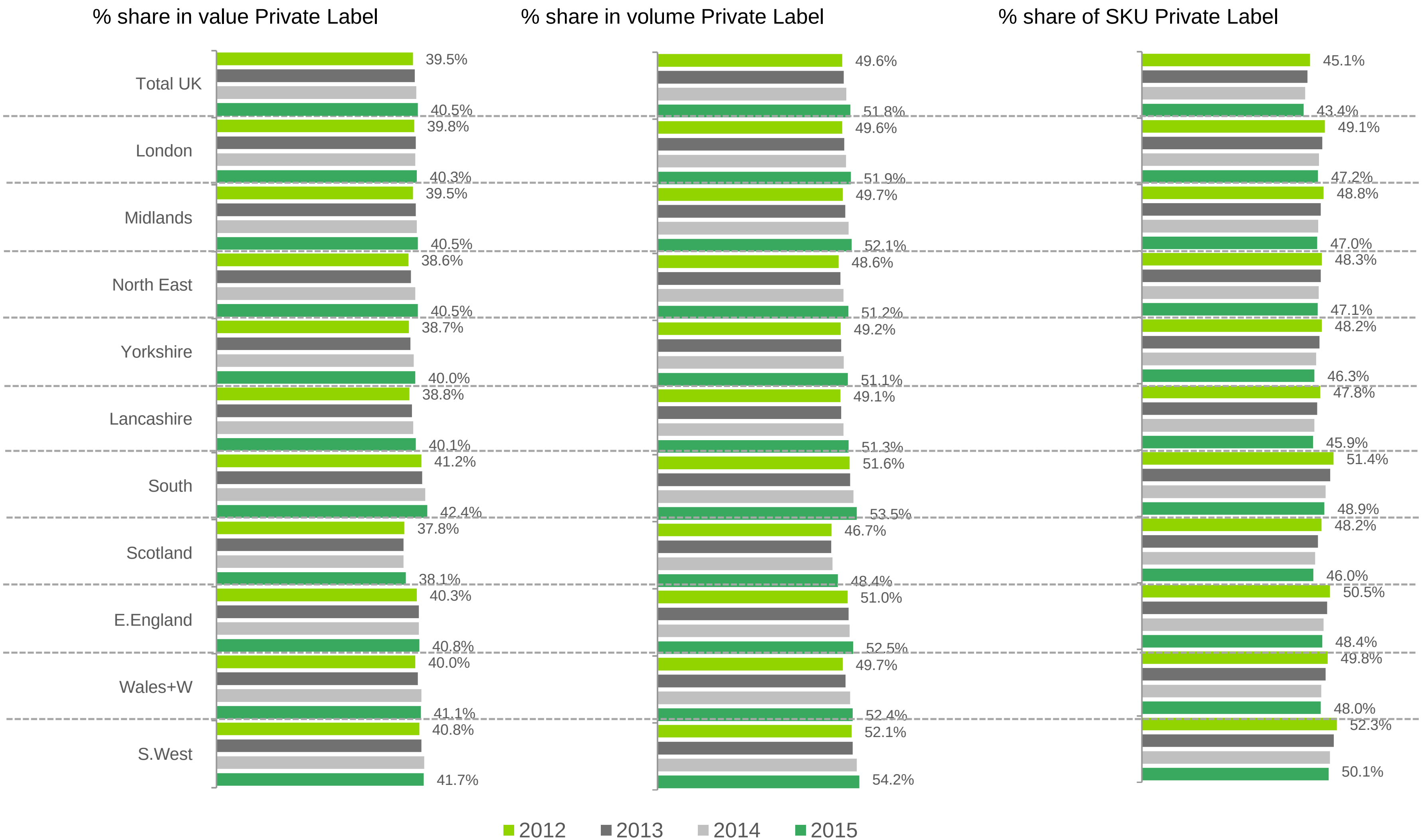
Share of market value	Year 2015
Total	**100,0**
London	20,6
Midlands	14,3
North East	4,5
Yorkshire	10,0
Lancashire	10,2
South	11,2
Scotland	9,5
East of England	7,9
Wales & West	8,6
SouthWest	3,2

% share of market in **value**, **volume**, **assortment (% Skus)** – Private label by region – 2015 -

Data source: Kantar Worldpanel, GFk, Europanel

PRIVATE LABELS SHARES AT REGIONAL LEVEL

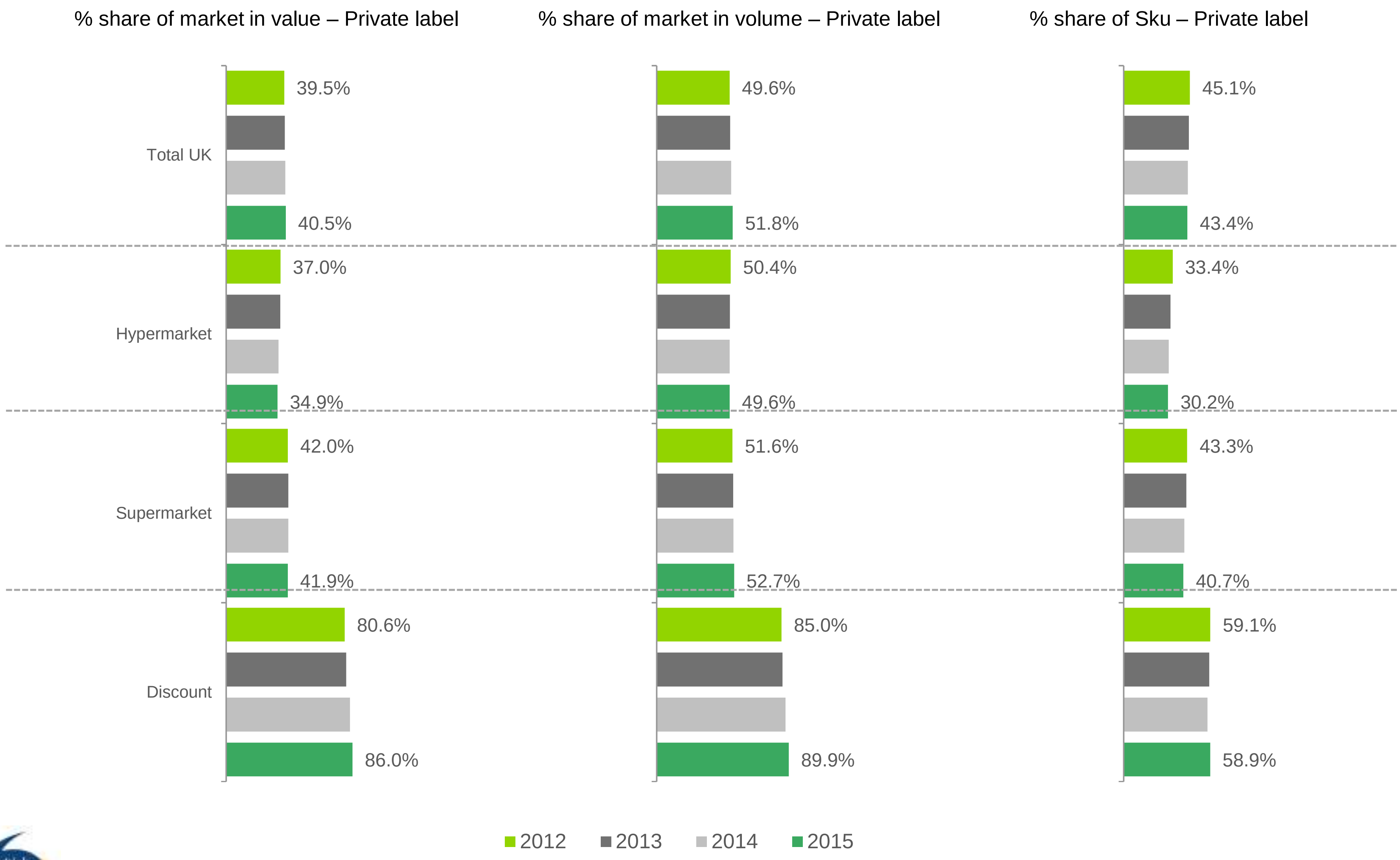
Overall decline in PL assortment, general increase in value and volume sales
In all but one region, the PL assortment is higher than the sales it generates in value



Data source: Kantar Worldpanel, GFk, Europanel

PRIVATE LABELS SHARES AT CHANNEL LEVEL

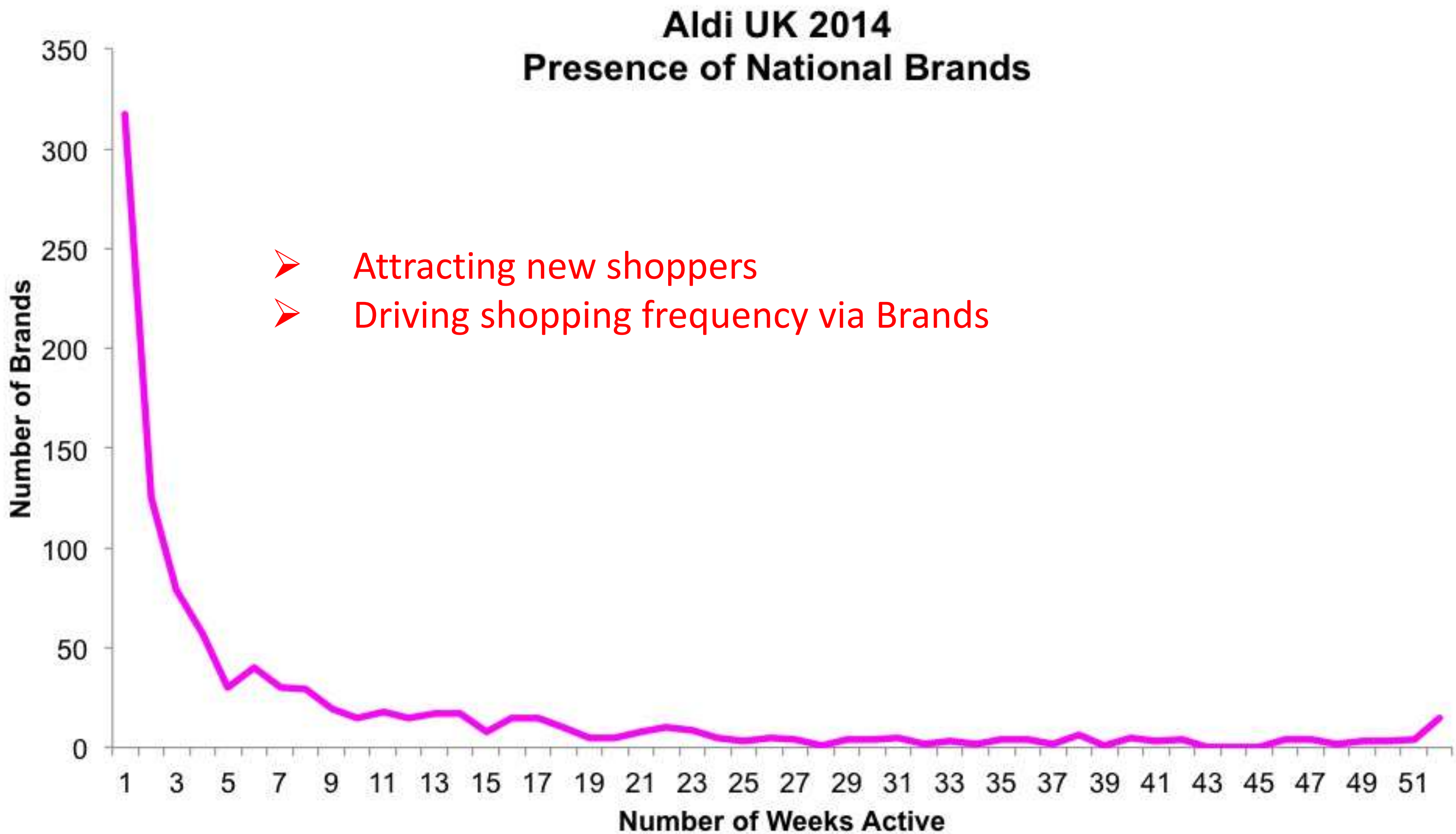
Relative low PL assortment in discount is explained by high brands rotation at discounters
The smaller (sqm) the store format, the higher the PL shares



Data source: Kantar Worldpanel, GFk, Europanel

WHY PRIVATE LABELS ASSORTMENT APPEAR LOWER THAN EXPECTED

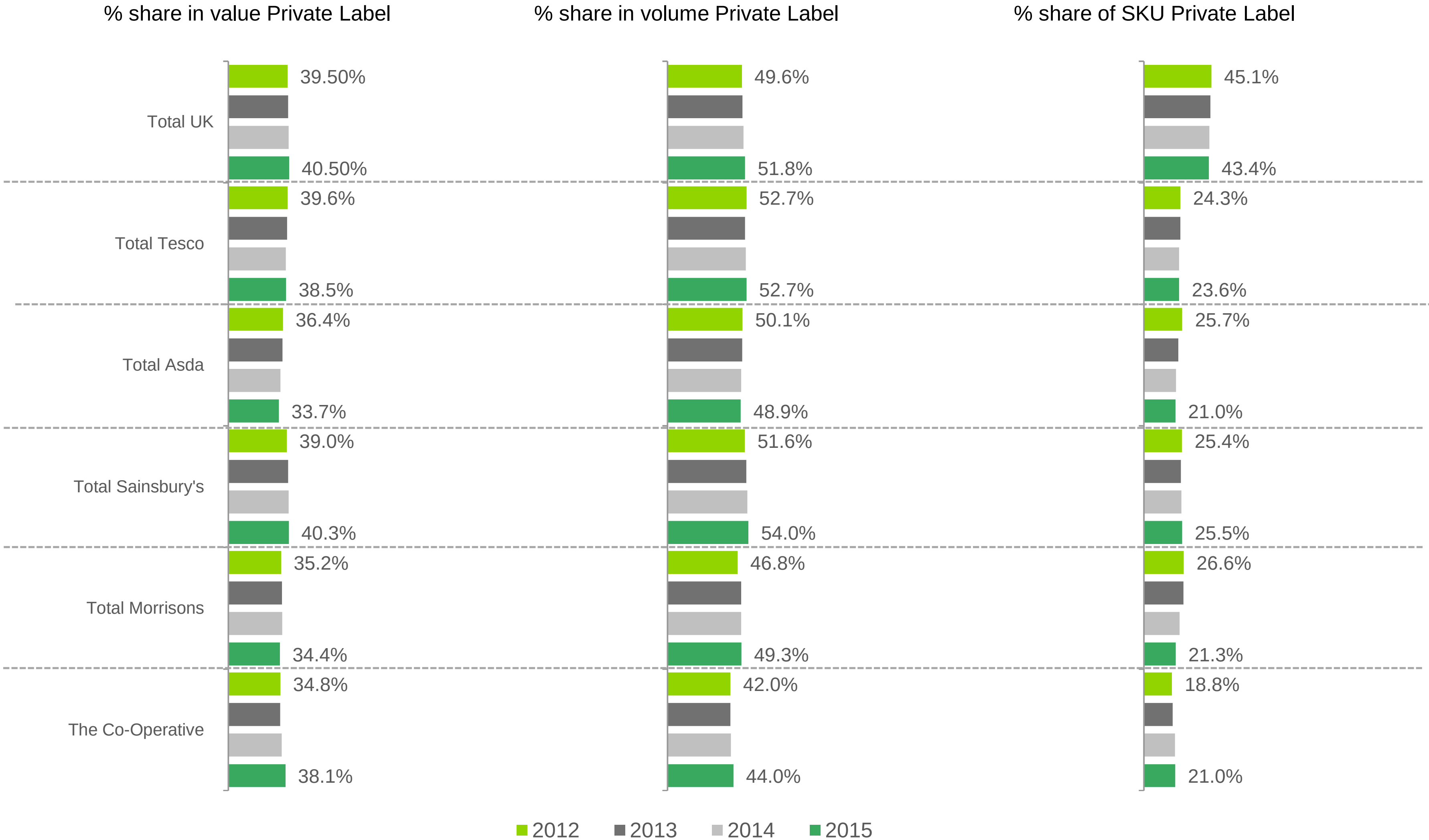
HIGH BRANDS LISTING…BUT AS EVENT, NOT AS PART OF LONG TIME ASSORTMENT STRATEGY,



Data source: Kantar Worldpanel, GFk, Europanel

PRIVATE LABELS SHARES AT RETAILER LEVEL

- Drop of PL assortment at the 2 market leaders, leading to drop of sales (value and volume)
- Increase in sales at Sainsbury's and The Co-Operative



Data source: Kantar Worldpanel, GFk, Europanel

1, Retail Concentration

2, Private Labels and assortment

3, Launch activities, listing

TOP LINES SUMMARY

- There is an overall drop of new products introduction (-30%) as well as an assortment reduction (-4%).

- Brands are struggling to get listed:
  - 8% of the branded new products cannot get listed by any of the 5 top retailers, losing therefore access to 70% of the market.
  - 19% of the new products can only get listed at one retailer,
  - 3 of the top 5 retailers reduced their listing of branded new products in last 3 years (Sainsbury's, Morrisons, the Co-operative), even if not necessarily their overall brands assortment
  - Maximum weighted distribution of new branded products with their listing at top 5 retailers is 44% (2015), a number much below what the top 5 retailers market share represents (70%)

- Brands start to lose some volume sales which drops proportionnally to their assortment drop.

- Yet, brands still manage to lead in innovation: 80% of the innovation at top 5 retailers is brought by brands on average in the last 3 years

- Tesco and and Asda, the 2 market leaders, are listing more branded new products than other retailers. It can partially be explained by their store formats, which include hypermarkets where more range is needed .

British Brands Group

Data source: Kantar Worldpanel, GFk, Europanel

AIM

75 CATEGORIES COVERED FOR THE REVIEW OF INNOVATION

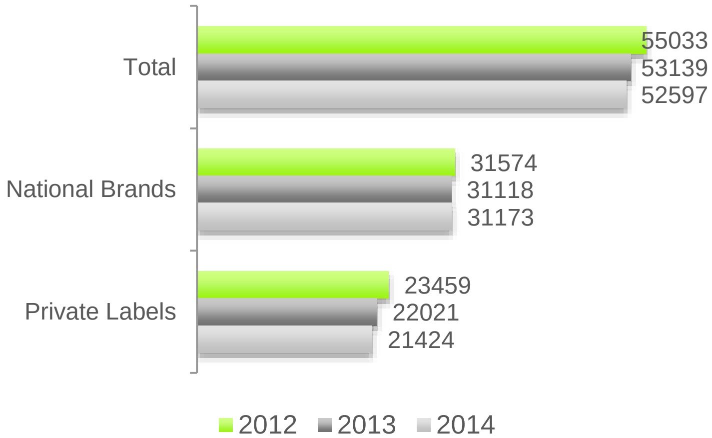
They represent 46% excluding Fresh and 45% of PL in the UK.

Bean and Ground Coffee	Frozen Fish	Pasta
Beer	Frozen Dinners and Entrees	Potato Crisps
Bleach	Frozen Pizza	Processed Cheese
Body Creams and Skin Care	Frozen Vegetables	Pure Fruit Juice
Breakfast Cereals	Hair Coloring Products	Razor Blades
Butter	Hair Conditioning Products	Salad Dressings
Candy Bars (Chocolate Outline)	Hairsprays	Sanitary Protection - Panty Liners
Canned Fish	Hard Cheese	Sanitary Protection - Tampons
Canned Green Beans	Heavy Duty Washing Powder	Shampoo
Canned Peas	Household Cleaners	Shaving Foams and Soaps
Carbonated Mineral Water	Ice Cream	Shower and Bath Additives
Chocolate Spread	Instant Coffee	Soft Cheese
Chocolate Tablets and Blocks	Instant Drinking Chocolate	Soup and Bouillons - Wet
Colas	Jam	Still Mineral Water
Concentrated Fruit Squash	Ketchups	Sweet Biscuits
Cooking Fats and Oils - Liquid	Kitchen Papers	Tea
Cooking Fats and Oils - Solid	Lavatory Cleaners	Tinned Soup
Cooking Sauces	Lemonades	Toilet Soap
Dentifrice and Toothpaste	Liquid Soap	Toilet Tissues
Deodorants	Margarine and Spreads	Tonic Water
Dishwasher Products - Solid	Mayonnaise	Toothbrushes
Dry Cat Food	Milk	Washing Up Liquids
Dry Dog Food	Olive Oil	Wet Cat Food
Fabric Conditioners	Other Flavored Carbonates (CSD's)	Window Cleaners
Facial Tissues	Packet Soup	Yoghurt

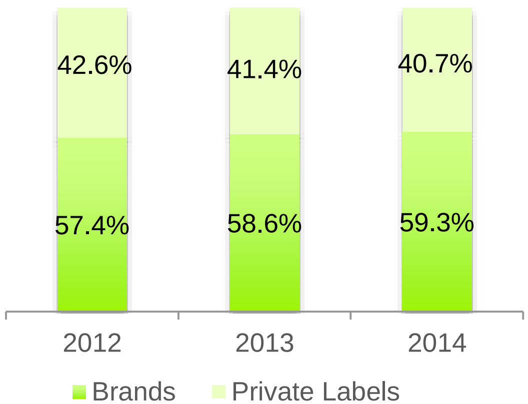
Data source: Kantar Worldpanel, GFk, Europanel

75 CATEGORIES COVERED FOR THE REVIEW OF INNOVATION

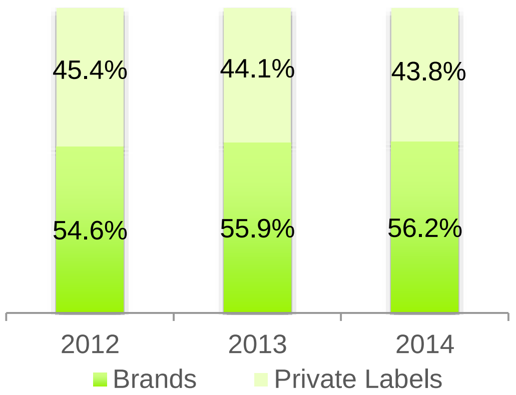
Number of SKUS



75 categories – Assortment

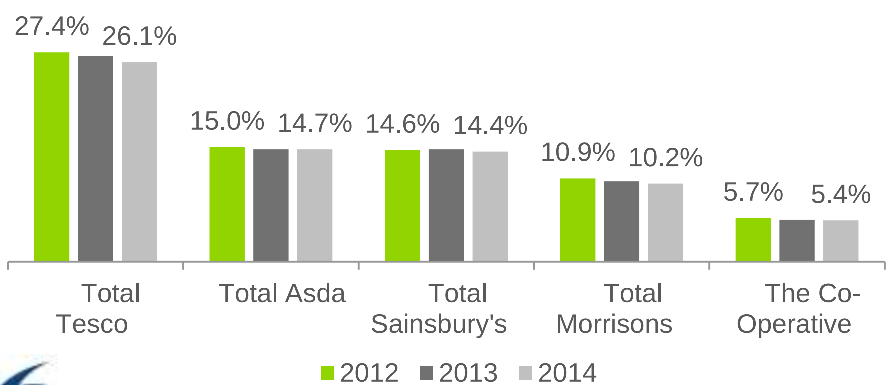


National Assortment

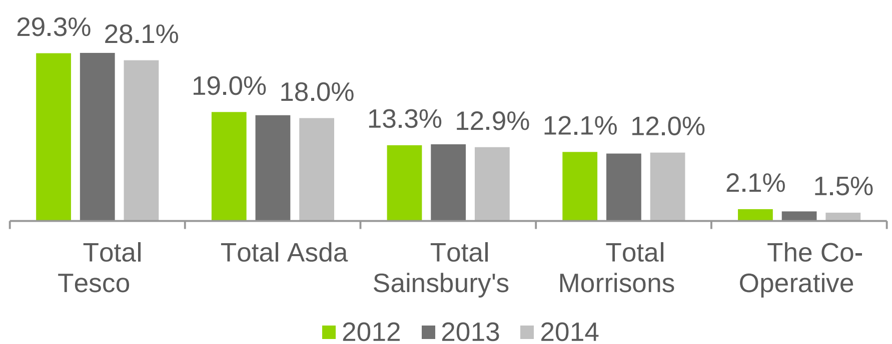


- 75 categories have more brands share than on average across all categories
- Higher retail concentration in the 75 categories studied for new products launches which represent 46% of grocery sales
- Tesco gains 2 points market share; Asda + 3 , Morrison's +2
- Sainsbury's loses – 1,5; the Co- Operative –4 compared to their national share, it is probably due to their PL strategy

National– Top 5 concentration: 69,7% (2015)



75 categories - Top 5 concentration: 62% (2015)



Data source: Kantar Worldpanel, GFk, Europanel

INNOVATION VERSUS RENOVATION

ALLOCATION BASED ON OBJECTIVE CODING FOR EACH SKU

Includes all new barcodes except temporary /seasonal/ promotional ones (less than 6 weeks purchasing)

1, Manufacturer brands or private labels

Private Label: carries retailer name or ‚brand' owned by retailer

2, Innovation or renovation

Innovation: New brand or sub-brand

Renovation: New flavour, size or variant

British Brands Group

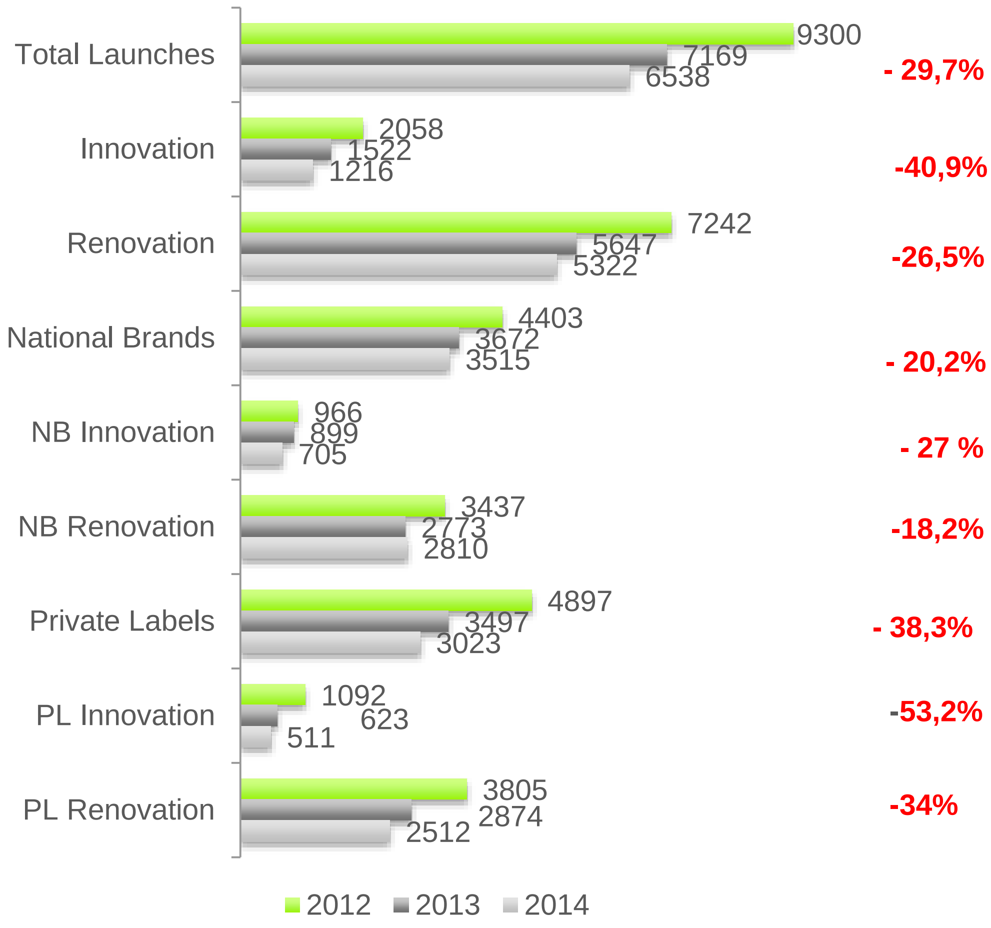
Note that: Innovation vs Renovation for Private Labels not available in France, Italy, Denmark

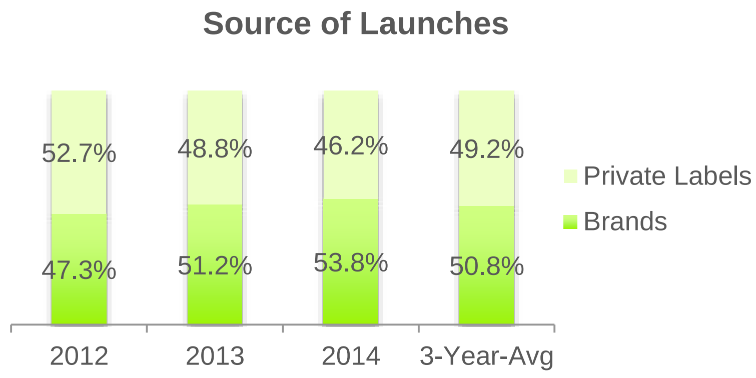
Data source: Kantar Worldpanel, GFk, Europanel

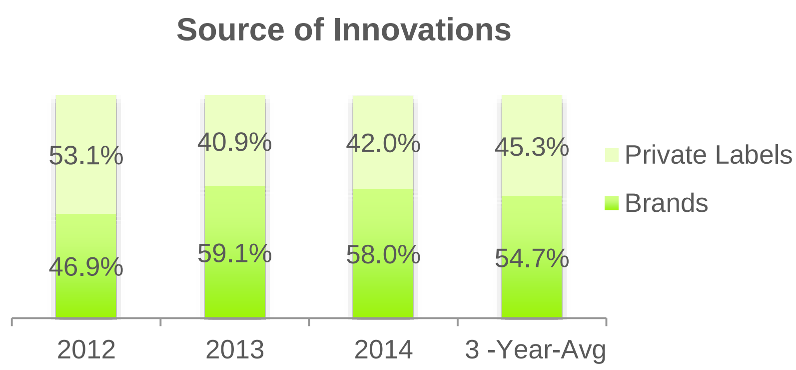
AIM

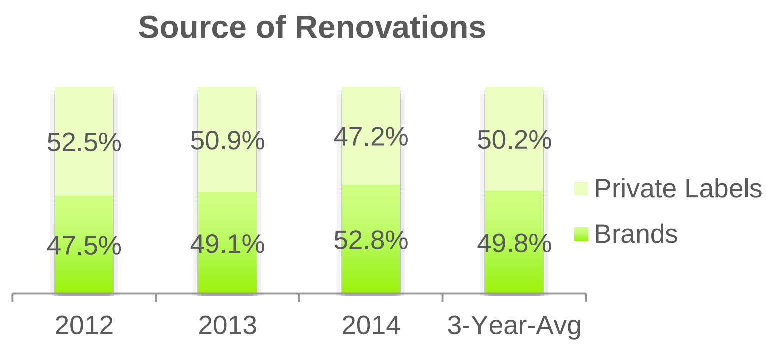
LAUNCH ACTIVITY: NUMBERS DOWN FROM 2012 TO 2014

of new SKUs per year









Innovation = a new product / new brand or sub-brand
Renovation = sizes, flavours, types.

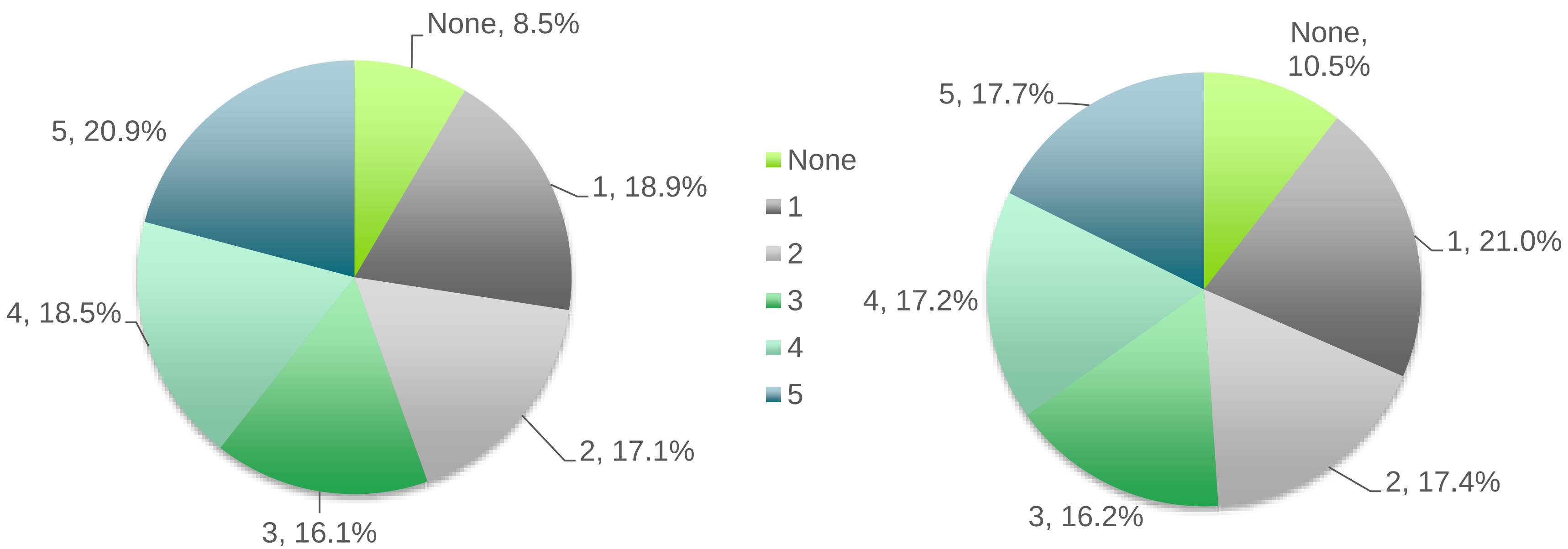
Data source: Kantar Worldpanel, GFk, Europanel

RETAILER LISTING OF BRANDS –3-YEAR- AVERAGE – TOP 5

% of new branded products that none,1,2,3,4,or 5 top retailers list within three years of launch

All national brand launches

National Brand Innovations



Value share potential *weighted distribution	2012	2013	2014
Brands new products total	46,0%	43,3%	44,3%
Innovation	42,8%	41,4%	41,7%
Renovation	47,0%	44,0%	45,0%

- Potential /maximum distribution = what listing at top 5 represents in % coverage of total market . Potential as no information available on the number of stores covered – estimate based on all stores of top 5 retailers listing products. It is unlikely the case as report in section 2 shows difference in regional assortment

Listing by a retailer: yes if new SKU was sold at retailer in first three years after launch
How to read: 8% of all national brand launches were not listed by any of the top 5 retail groups, 19% were listed by one retail group, 17% were listed by 2 out of the top 5 retail groups, etc

Data source: Kantar Worldpanel, GFk, Europanel

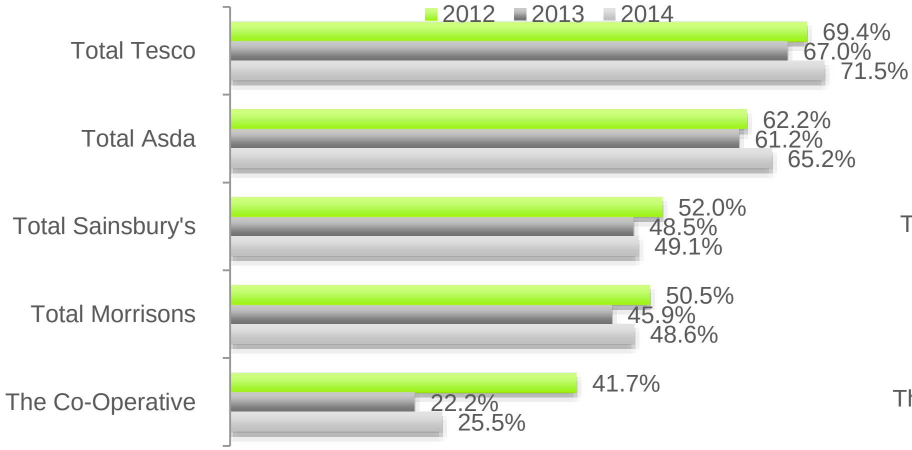
RETAILER SUPPORT OF NEW PRODUCTS - BRANDS

More support for renovation than innovation for branded new products

Branded new products lose listing in 3 of the top 5 retailers

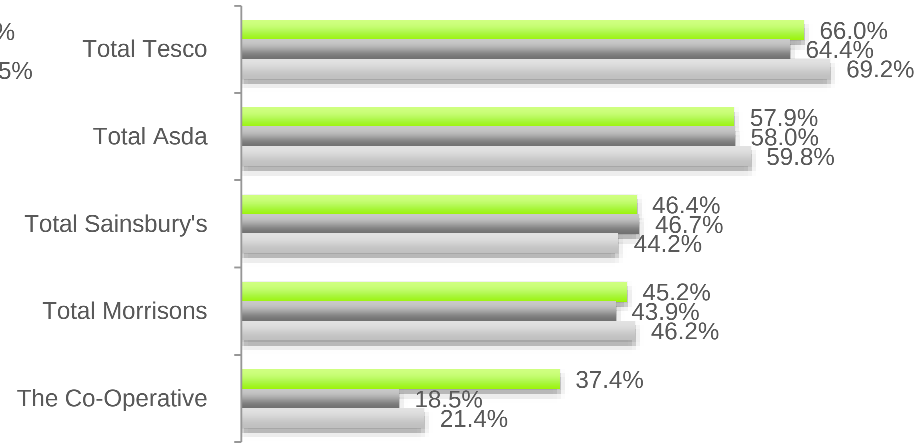
NB launches listed

n= 4403/3672/3515 for 12/13/14



NB innovations listed

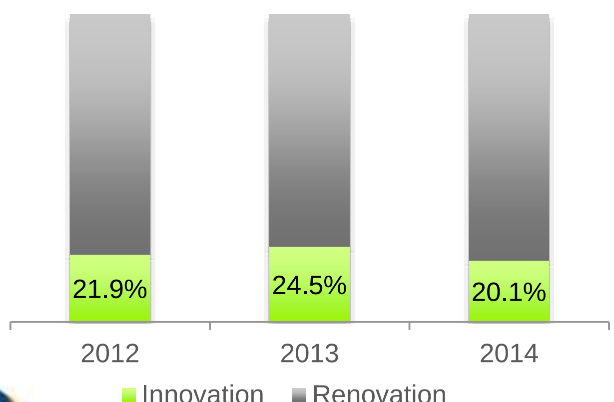
n= 966/899/705 for 12/13/14



<u>How to read this chart:</u>

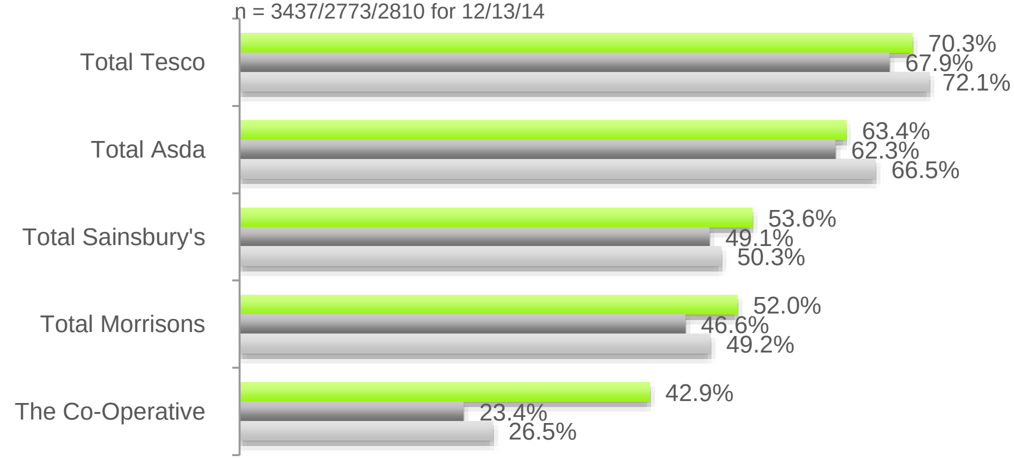
Of all 2012 national brands launched, 69% were listed by Tesco

National Brand Launches



NB renovations listed

n = 3437/2773/2810 for 12/13/14



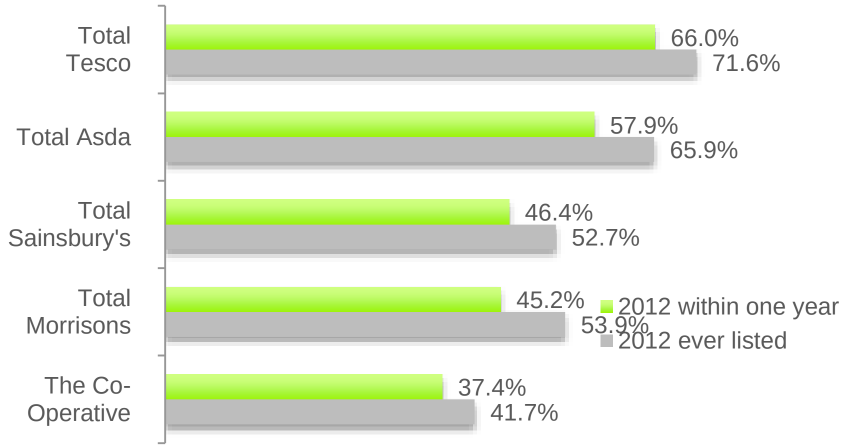
Data source: Kantar Worldpanel, GFk, Europanel

RETAILER SUPPORT OF BRANDED LAUNCHES

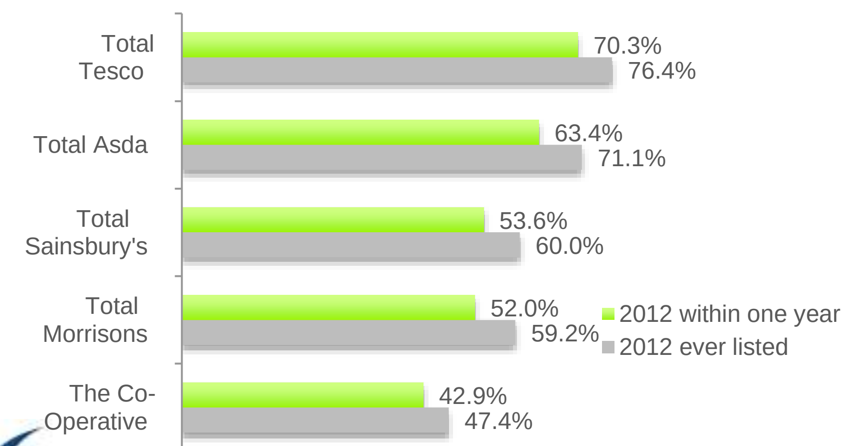
More listing after first year, likely after success of products proven when listed at others

2012 Launches

NB Innovations listed

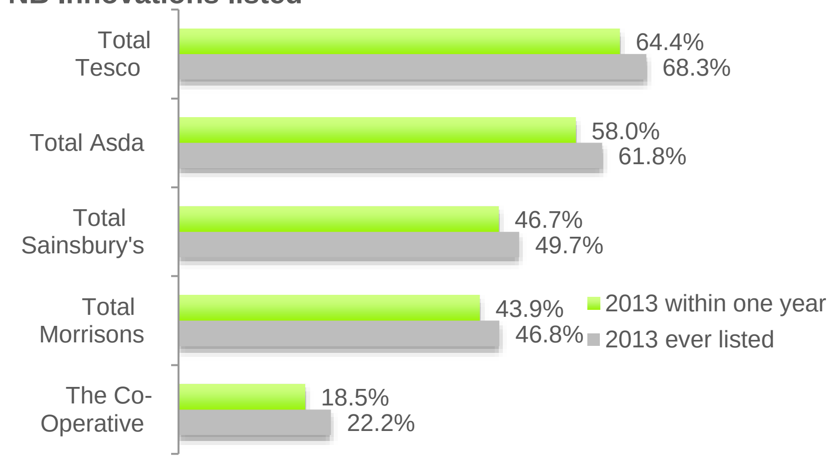


NB Renovations listed

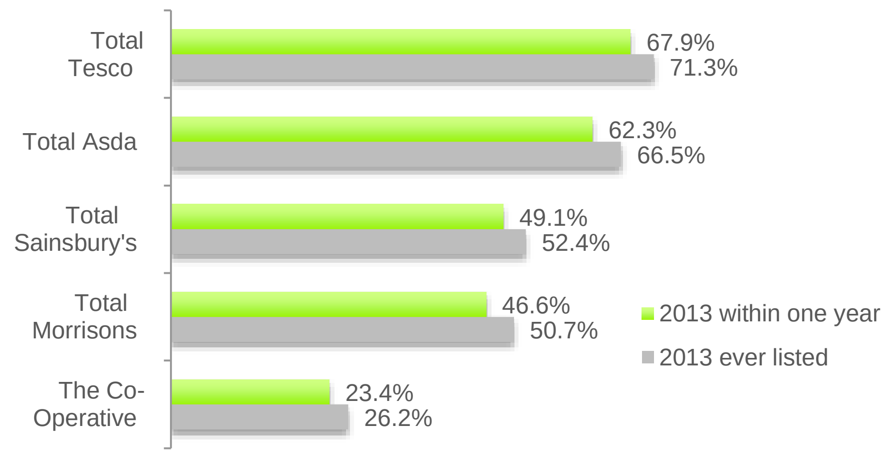


2013 Launches

NB Innovations listed



NB Renovations listed

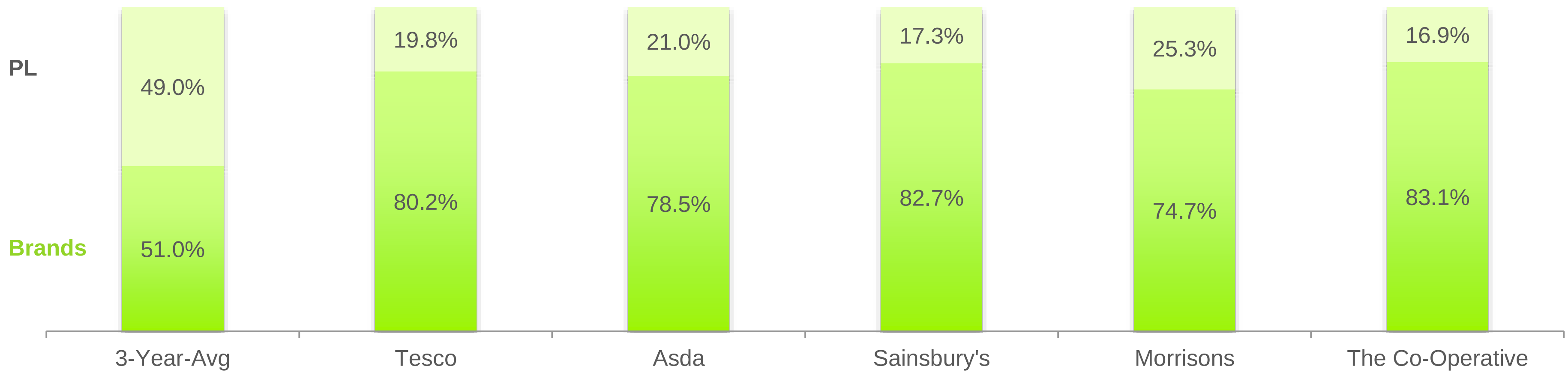


Data source: Kantar Worldpanel, GFk, Europanel

SOURCE OF LAUNCH ACTIVITIES – 3 YEAR AVERAGE (2012-2013-2014)

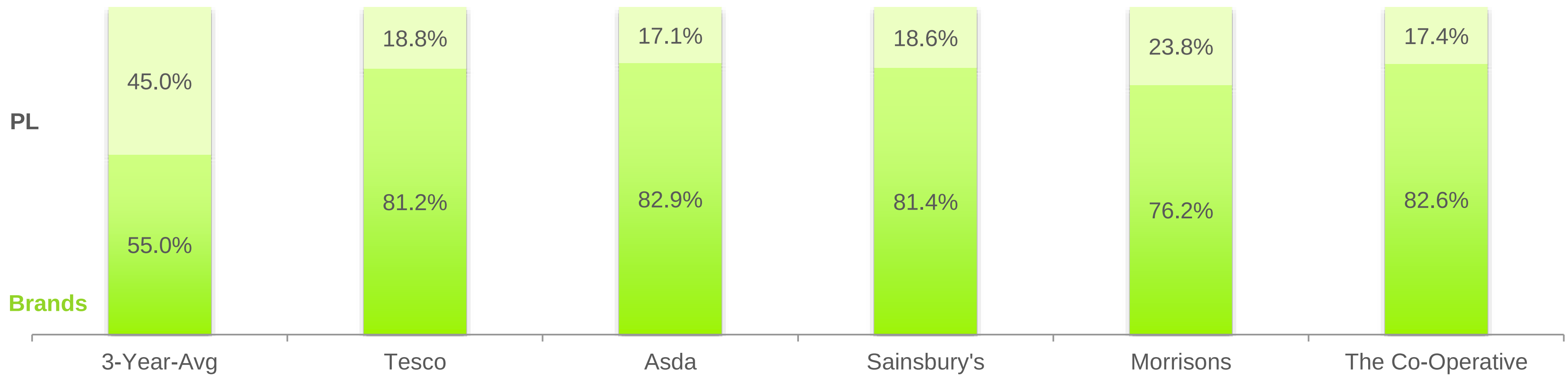
BRANDS REPRESENT MOST OF THE INNOVATION AT TOP 5 RETAILERS, BEYOND THEIR SHARE IN ASSORTMENT

ALL Launches



% PL SKUS * **41%** **24%** **23,4%** **25,1%** **25,6%** **19,6%**

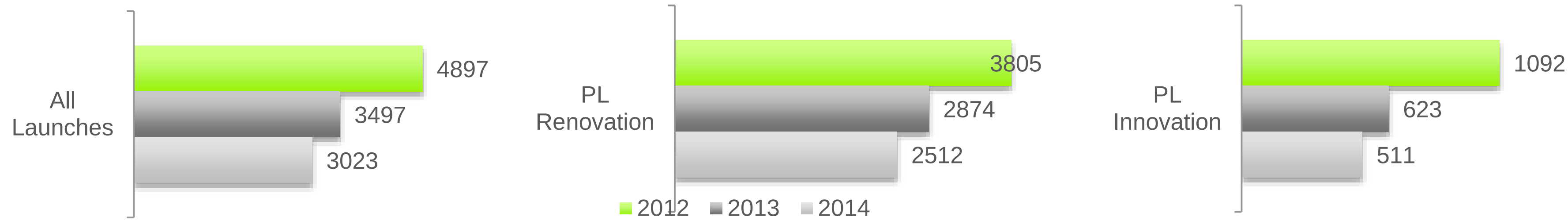
INNOVATION



* national assortment – 3 year average pl skus share (2012-2013-2014)

Data source: Kantar Worldpanel, GFk, Europanel

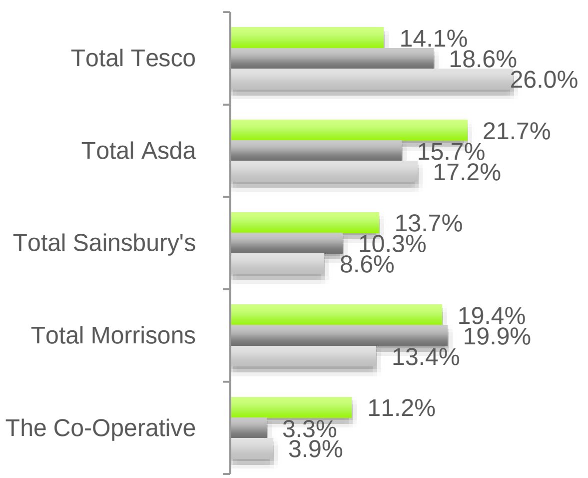
PRIVATE LABELS LAUNCHES



Number of new Private Labels SKUs

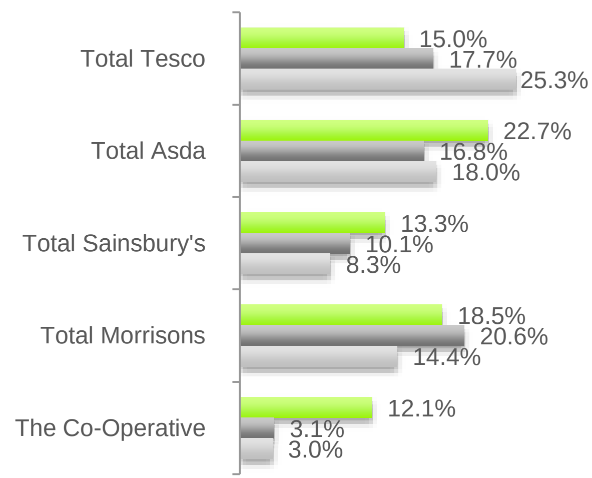
Assortment share within New PL:	2012	2013	2014
Innovation	22%	18%	17%
Renovation	78%	82%	83%

ALL PL Launches listed



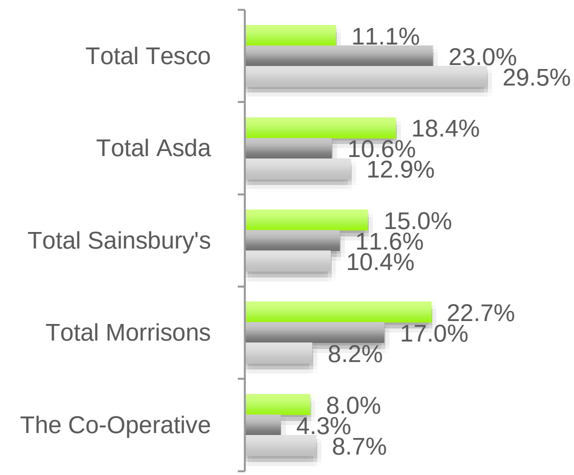
	2012	2013	2014
Share of Top 5	80%	68%	69%

PL Renovations listed



	2012	2013	2014
Share of Top 5	82%	68%	69%

PL Innovations listed



	2012	2013	2014
Share of Top 5	75%	66%	70%

Data source: Kantar Worldpanel, GFk, Europanel

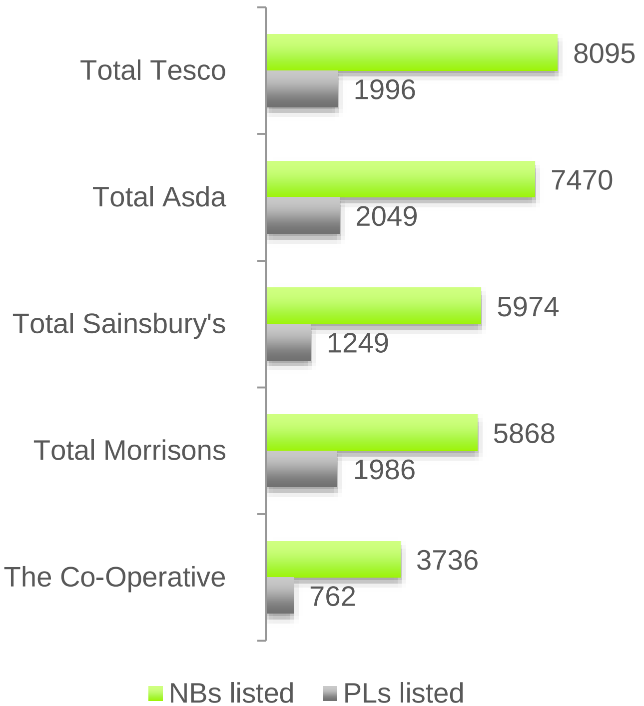
RETAILERS SUPPORT OF NEW PRODUCTS

Retailers leading in new products listing are retailers which reduced private labels assortment

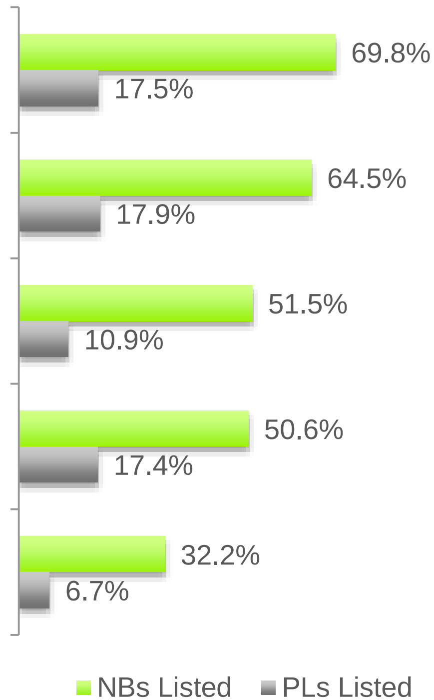
Launches listed by each retailer

Number of new products listed

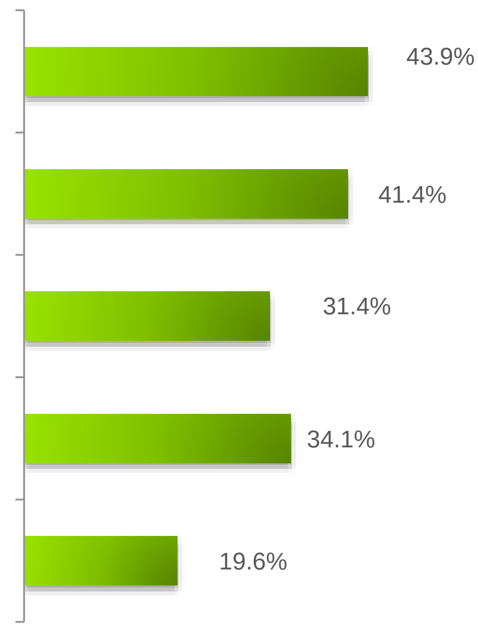
- Total; 23,007 skus
- Brands:11,590 skus
- PL: 11,417 skus



Retailer share of new products launches
By Origin (Brands, Private labels)



Retailer share of new products launches
Total



70% of 3 year- PL launches covered by top 5 retailers

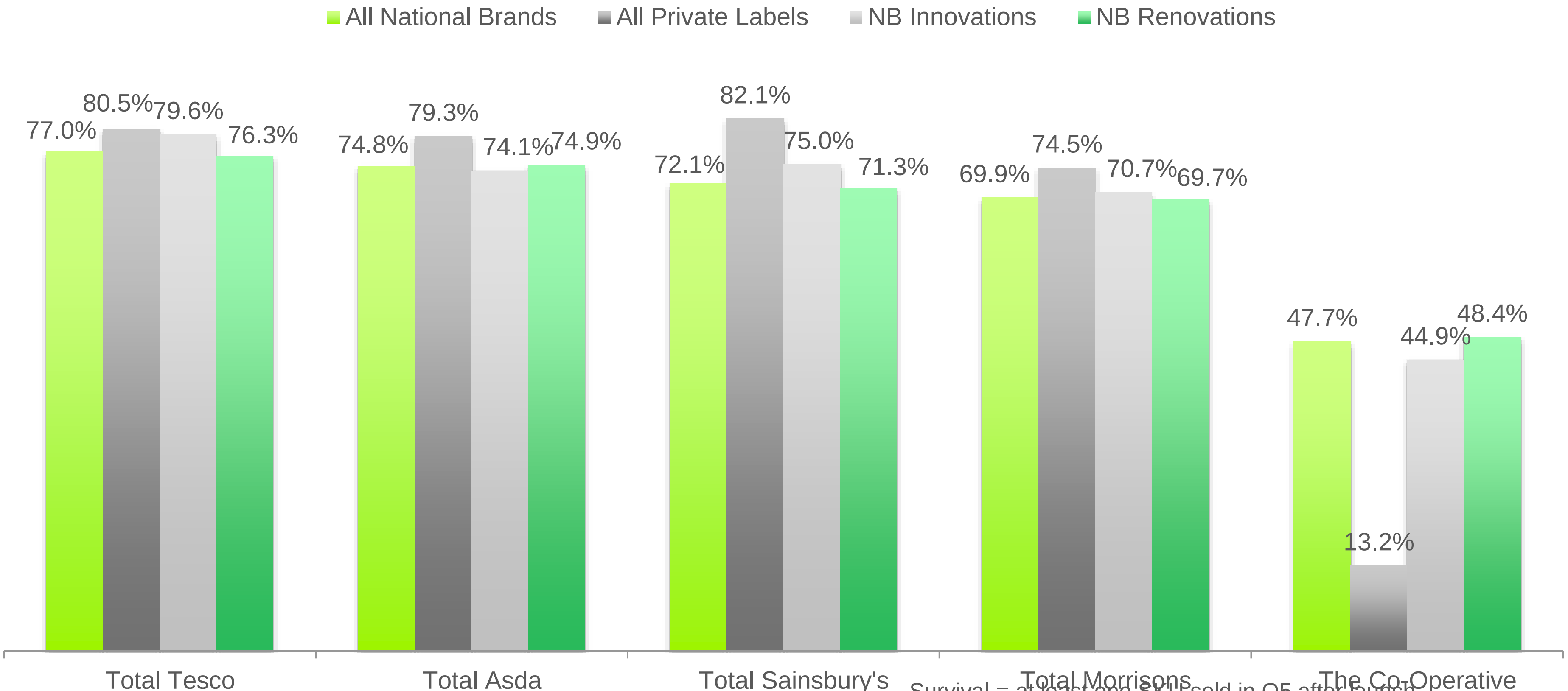
<u>How to read:</u>
Tesco has listed 1996 new PLs and 8095 new NBs over the period covered (2012-2014)

Data source: Kantar Worldpanel, GFk, Europanel

SURVIVAL RATE BY RETAILER AFTER ONE YEAR OF LAUNCH - 2012

Survival rate slightly higher for Private labels than brands at the exception of The Co-Operative

% of new SKUs **listed by that retailer** still on the market 1 year after launch -2012 New Products

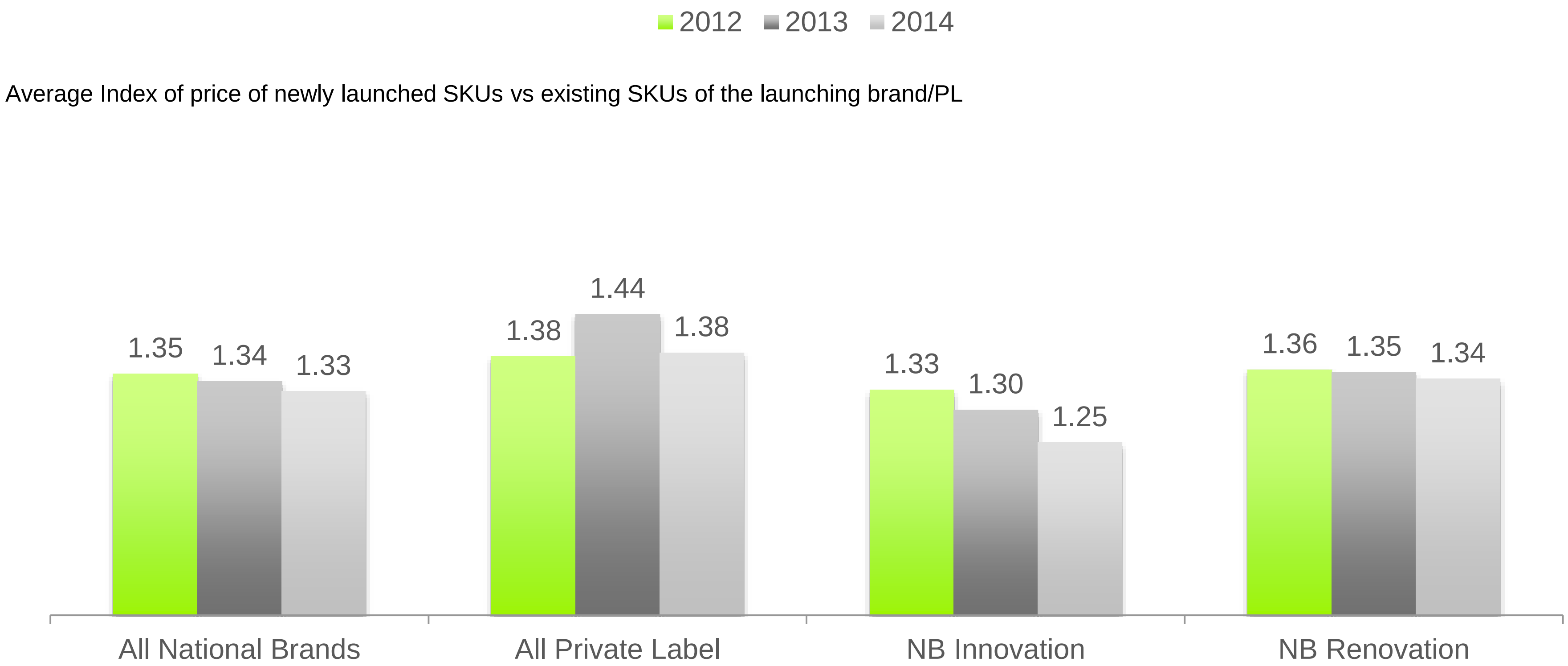


Survival = at least one SKU sold in Q5 after launch

Data source: Kantar Worldpanel, GFk, Europanel

PRICE OF LAUNCHES
NEW PRODUCTS PLAY AN IMPORTANT ROLE TO SUSTAIN PRICE LEVELS

Private labels price increase through new products introduction higher than brands',

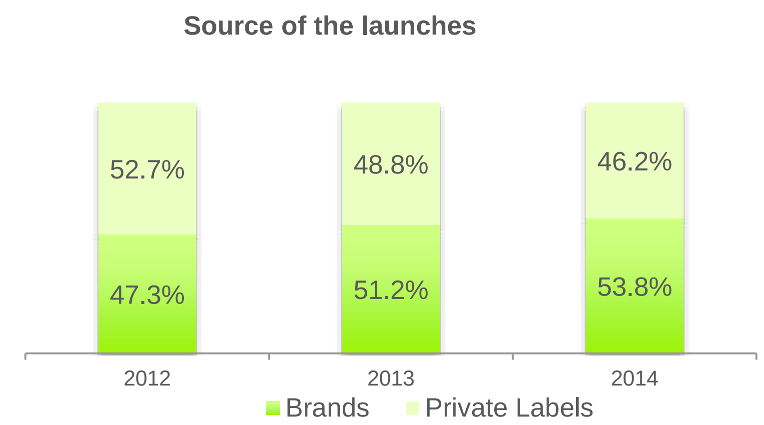


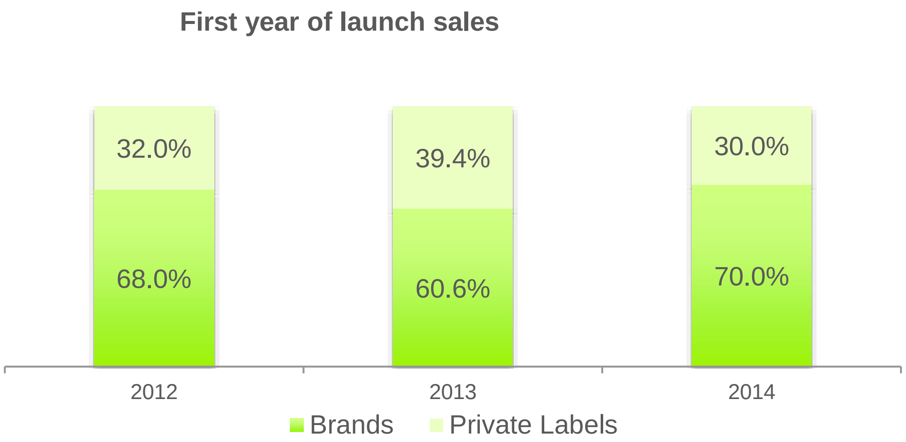
Index shows the price level of newly launched SKUs in year 1 after the launch relative to the average price of the brand/PL that has launched the new SKU in the same time period; averaged across all SKUs

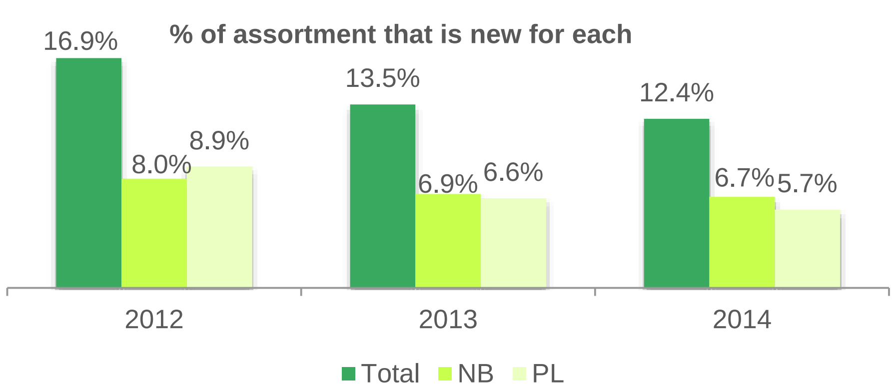
Data source: Kantar Worldpanel, GFk, Europanel

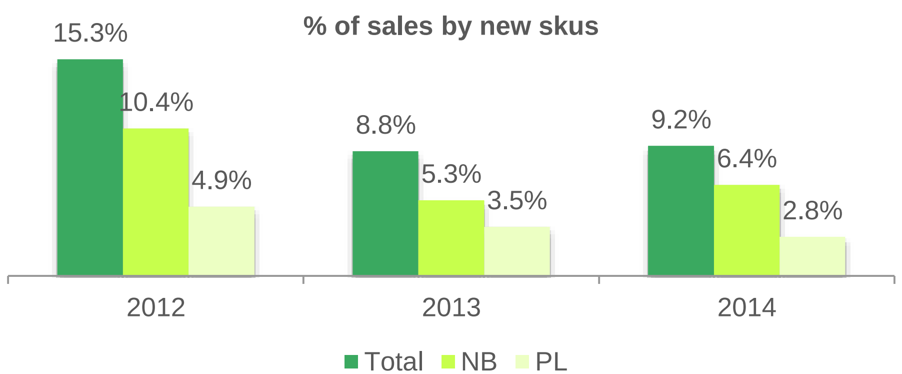
LAUNCH IMPACT

Private labels price increase through new products introduction higher than brands',









How to read:

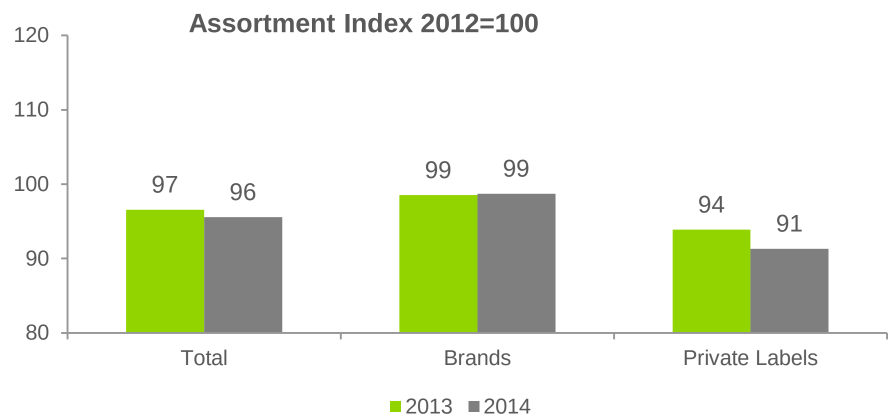
- 17% of the assortment in 2012 consists of SKUs launched in that year
- These new skus represent 15% of the total sales value
- 8% of the total assortment consist of branded launches that represent 10% of sales

** Without timing of launches, it is hard to compare the performance of sales in relation to new products introduction. There is no necessarily a full year of sales but a few months for skus introduced in latest quarters of the year.

Data source: Kantar Worldpanel, GFk, Europanel

75 CATEGORIES COVERED FOR THE REVIEW OF NEW PRODUCTS

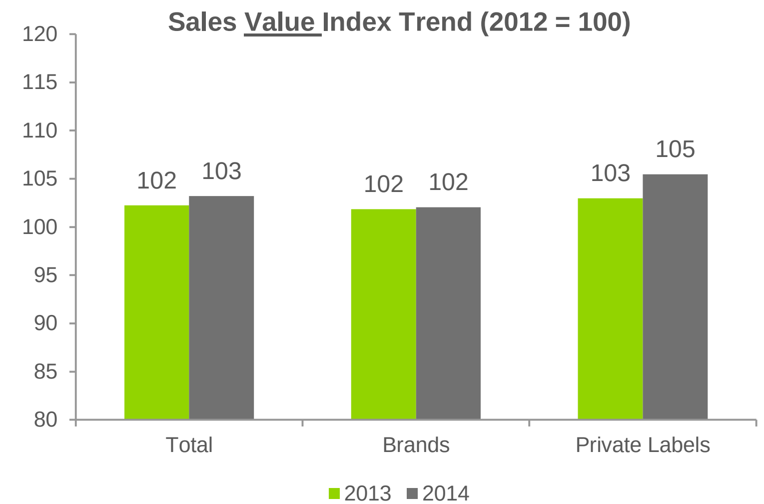
- Change of overall assortment: **-4,4%** (2014/2012)
- Change of brands assortment : -**1,3%** (2014/2012)
- Change of private labels assortment: **-8,7%** (2014/2012)

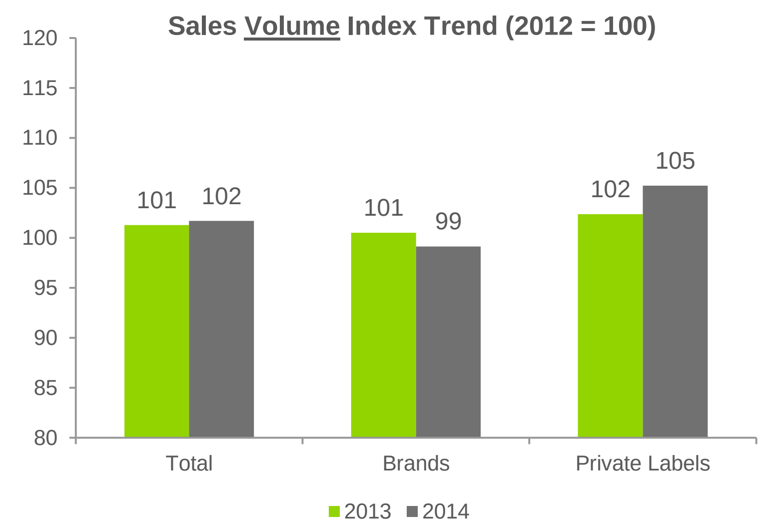


New products less than 3 years account for
- 41% of total categories (67) value sales
- 40% of brands sales
- 44% of private labels sales

- Brands lost in listing and distribution among top 5 retailers for their new products. It seems to impact negatively their volume sales, which drops proportionnally to their assortment drop

- Private labels are gaining in sales, volume and value wise, thanks to discount gain in market share and despite the drop of private labels assortment nationwide.





GLOSSARY OF INDICATORS

INDICATOR	HOW IS IT CALCULATED?
Launch	When a new ean appears at least twice in the market over a period of more than 6 weeks we identify it as a launch (6 week period to discard seasonal offers)
Type of innovations	When a new ean appears in the market (*) we will a. Distinguish whether it is from national brand manufacturers or a private label b. Distinguish between innovations and renovations Innovation = new brand or new sub-brand Renovations = new sizes, flavours, variants
Penetration rate	% of the population who buy at least one product in a given period
Cumulative penetration rate	% of the population who buy at least one product up to that period
Annual spend per shopper	Total spend in € purchased by an average shopper per year in FMCG
Spend per trip	€ purchased per trip by an average shopper
Number of trips	Frequency of purchase – number of visits to store per year by an average shopper
Frequency	Average number of purchases by a (buying) household in a given period
Cumulative frequency	Average number of purchases by a (buying) household up to that period
Consumer reach point	Population x penetration x frequency of purchase (number of trips) – usually indexed to make it comparable across launches
% distribution	% of innovations listed by retailer (in a specified time period)