



Press information

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ANOTHER RECORD SHARE FOR ASDA (PLUS AN UPDATE ON GROCERY PRICE INFLATION)

Chris Longbottom, Director, TNS Worldpanel, comments:

The latest TNS Worldpanel grocery market share figures, published today for the 12 weeks ending 22nd March 2009, continue to show a strong growth rate of 5.8%. Whilst slightly lower than February's this is against strong comparatives from 2008 when the March figures included Easter seasonal spending, which will occur more normally in April this year.

This growth in consumer spending remains below the Grocery price inflation of 9.3% as shoppers continue to seek to manage the impact of higher prices which are still feeding through year-on-year in the Grocery Sector. Shoppers trading down to lower-priced products, especially within the retailers' Own Label ranges, is the main way they are seeking to contain this.

Asda has once again shown its strength as an everyday low price champion with another record share of 17.5% (17.1% this time last year) & year-on-year growth rate of 8.5%. Morrisons continued its consistent improvement with a share of 11.8% & growth of 7.2%

Sainsbury's growth of 5.7% was in line with Grocery sector average, giving them a constant share of 16.1%

Tesco's growth rate was marginally behind the sector at 4.3%, resulting in a share figure of 30.4% (compared to 30.8% last year), influenced by stronger consumer purchasing of the economically-priced Value range.

Discounters (Aldi, Lidl, Netto) continue to enjoy strong growth with Shopper Spending up 13% giving them a combined share of 5.9% compared to 5.5% last year. However there are some signs of a slowdown in this rate of growth, suggesting that the Major Multiples are becoming more successful in containing this long-term challenge.

An update on inflation

Grocery price inflation has increased and the figure for the 12 week-ending period 22nd March 2009 is 9.3% compared with 8.7% seen 4 weeks ago. The weakness of Sterling is feeding through to commodity price 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 as they trade down or seek out more offers.

Total Till Roll

Great Britain Consumer Spend

Includes all expenditure through main store tills and excludes petrol & instore concession

	12 Weeks to 23 March 2008		12 Weeks to 22 March 2009		change %
	£000s	% **	£000s	% **	
Total Till Roll	27,906,191		28,605,449		2.5
Total Grocers	20,060,291	100.0%	21,227,518	100.0%	5.8
Total Multiples	18,605,858	92.7%	19,758,429	93.1%	6.2
Tesco	6,185,522	30.8%	6,453,370	30.4%	4.3
Asda	3,421,940	17.1%	3,711,938	17.5%	8.5
Sainsbury's	3,239,500	16.1%	3,422,662	16.1%	5.7
Morrisons	2,327,583	11.6%	2,495,623	11.8%	7.2
Somerfield	715,232	3.6%	699,959	3.3%	-2.1
Waitrose	795,406	4.0%	805,006	3.8%	1.2
Iceland	343,713	1.7%	375,708	1.8%	9.3
Netto	147,294	0.7%	150,678	0.7%	2.3
Lidl	442,317	2.2%	499,544	2.4%	12.9
Aldi	520,963	2.6%	605,635	2.9%	16.3
Farm Foods	99,155	0.5%	118,442	0.6%	19.5
Other Freezer Centres	47,741	0.2%	49,989	0.2%	4.7
Other Multiples	319,493	1.6%	369,876	1.7%	15.8
The Co-operative	895,746	4.5%	939,622	4.4%	4.9
Total Independents	558,686	2.8%	529,467	2.5%	-5.2
Total Symbols	206,325	1.0%	198,857	0.9%	-3.6
Other Independents	352,362	1.8%	330,610	1.6%	-6.2

** = Percentage Share of Total Grocers

To view the video commentary from Chris Longbottom or to get further information please visit www.tnsglobal.com.

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Note to editor

These findings are based on TNS Worldpanel data for the 12 weeks to 22nd March 2009. TNS Worldpanel monitors the household grocery purchasing habits of 25,000 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, TNS 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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