



KANTAR

**Sailing without
wind:
Which currents to
take advantage of?**

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8th February 2024

Updated until 31/12/2023

1 Sailing without wind

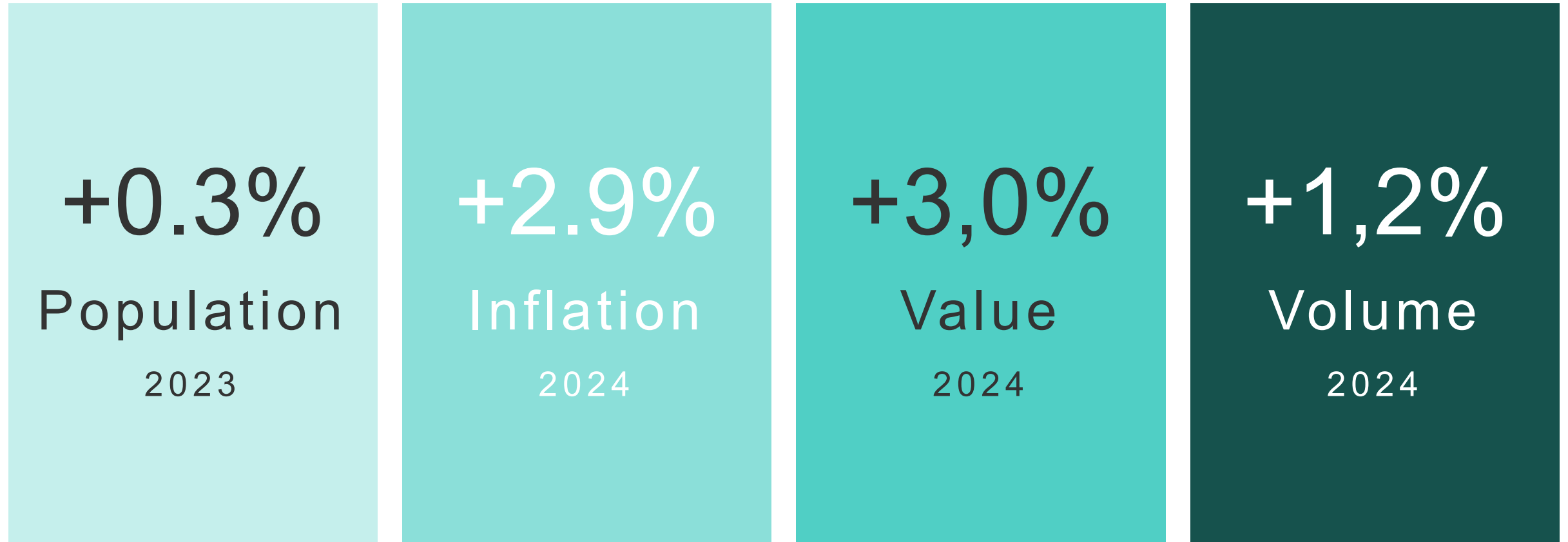


Will FMCG grow in volume in 2024?

YES

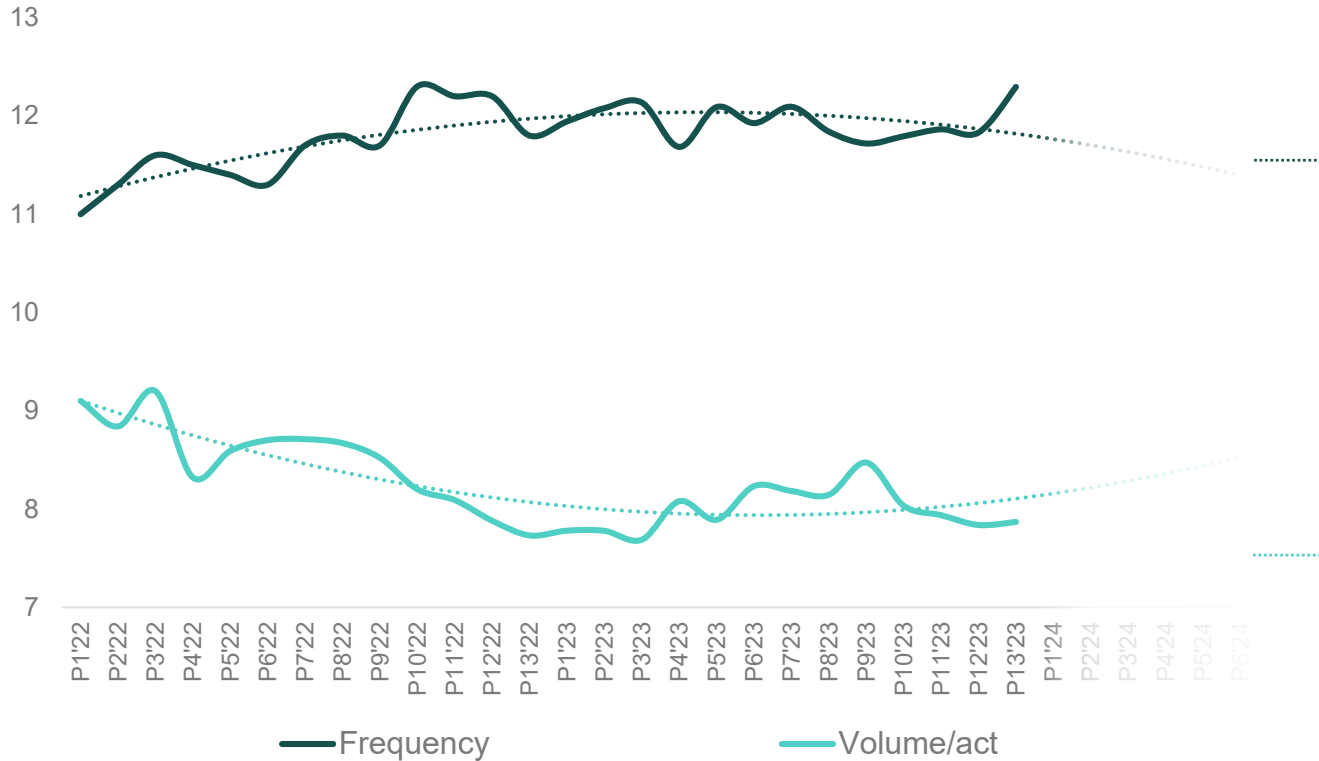
NO

In 2024, FMCG volume is expected to stabilize

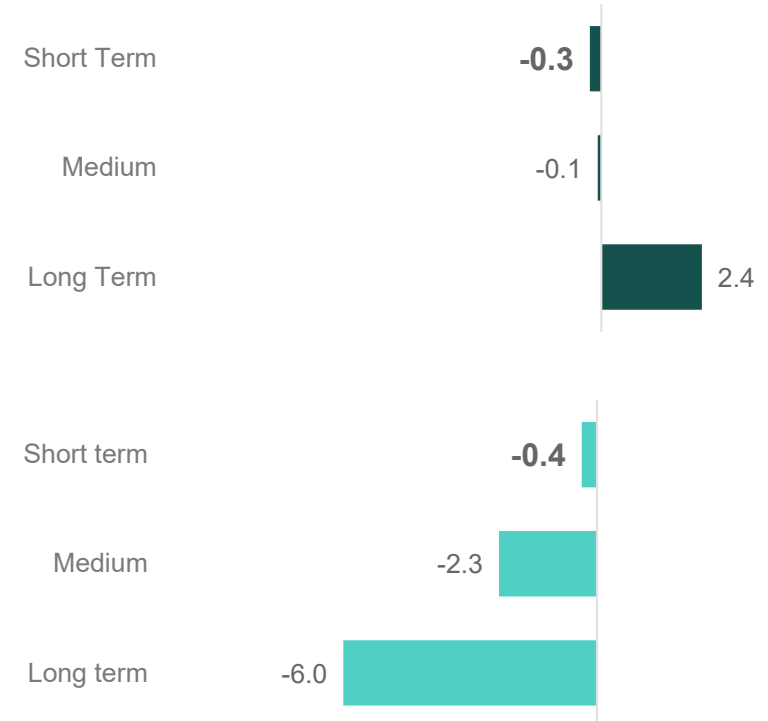


With purchase pattern stabilization

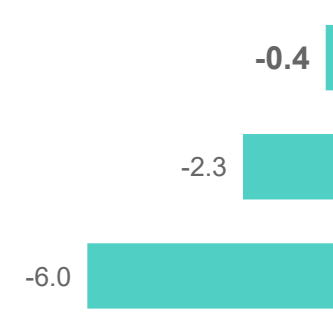
FMCG | Frequency and Vol./Act | Periods



FMCG | Frequency Evolution



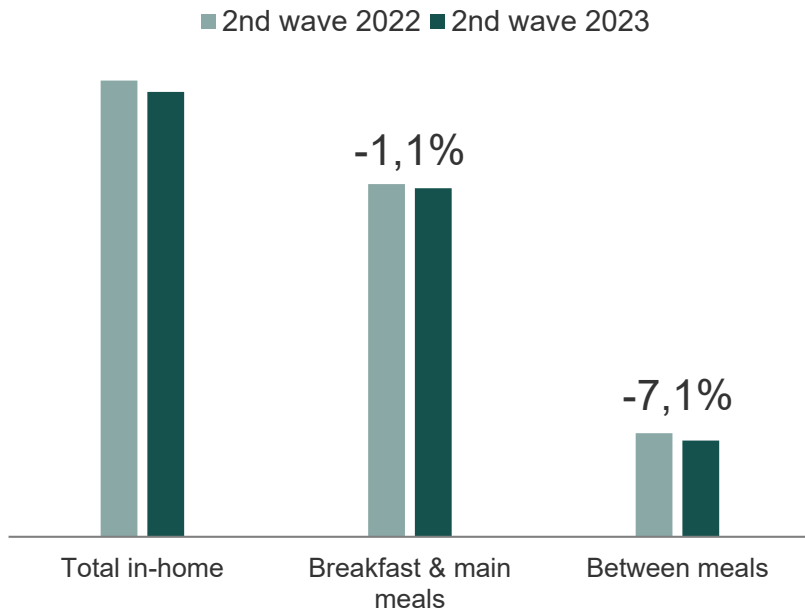
FMCG | Evolution Vol./Act



In Out of home, the wind is blowing in favor of the consumption



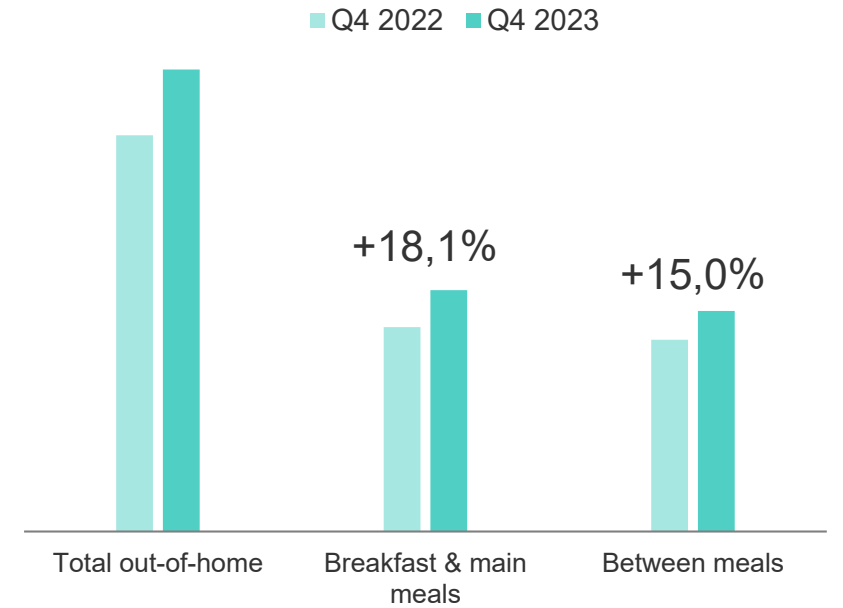
In-home: -2,5% S2'23 vs YoY



Total IN & OUT of Home consumption
Breakfast & main meals +7,8%
Between meals +9,2%

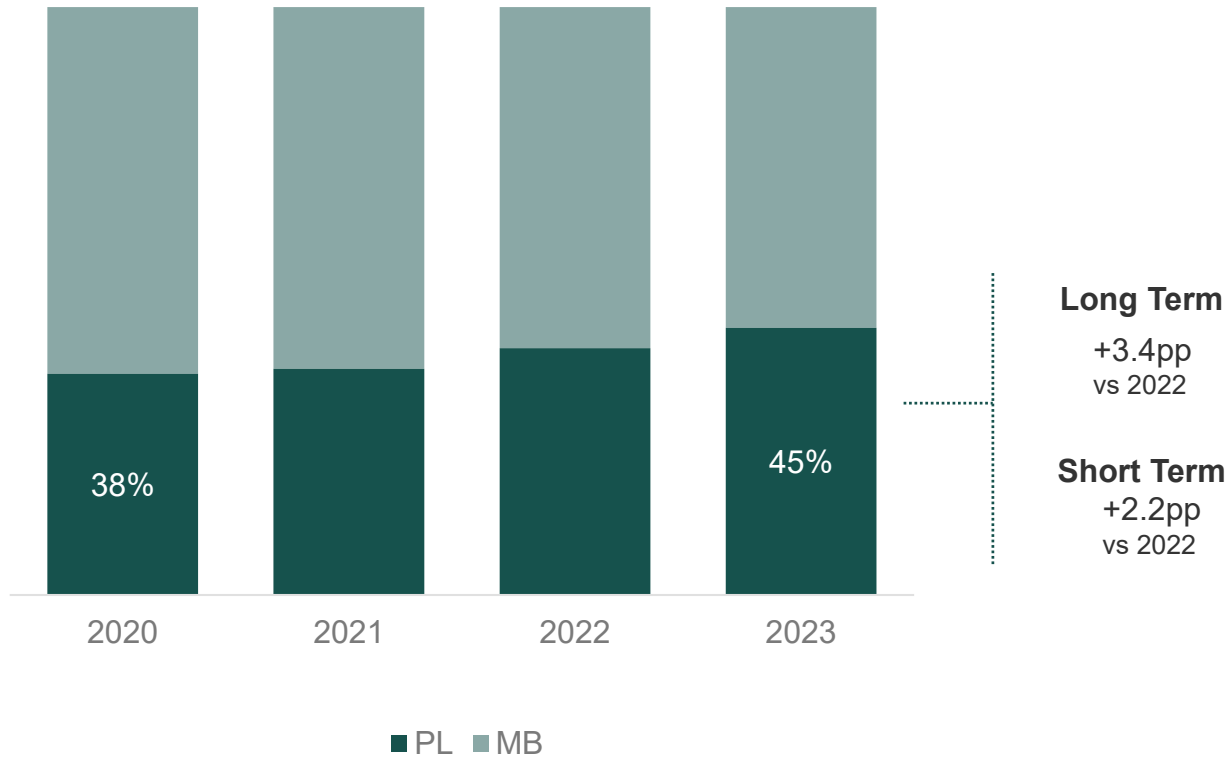


Out of home: +16,6% Q4'23 vs YoY



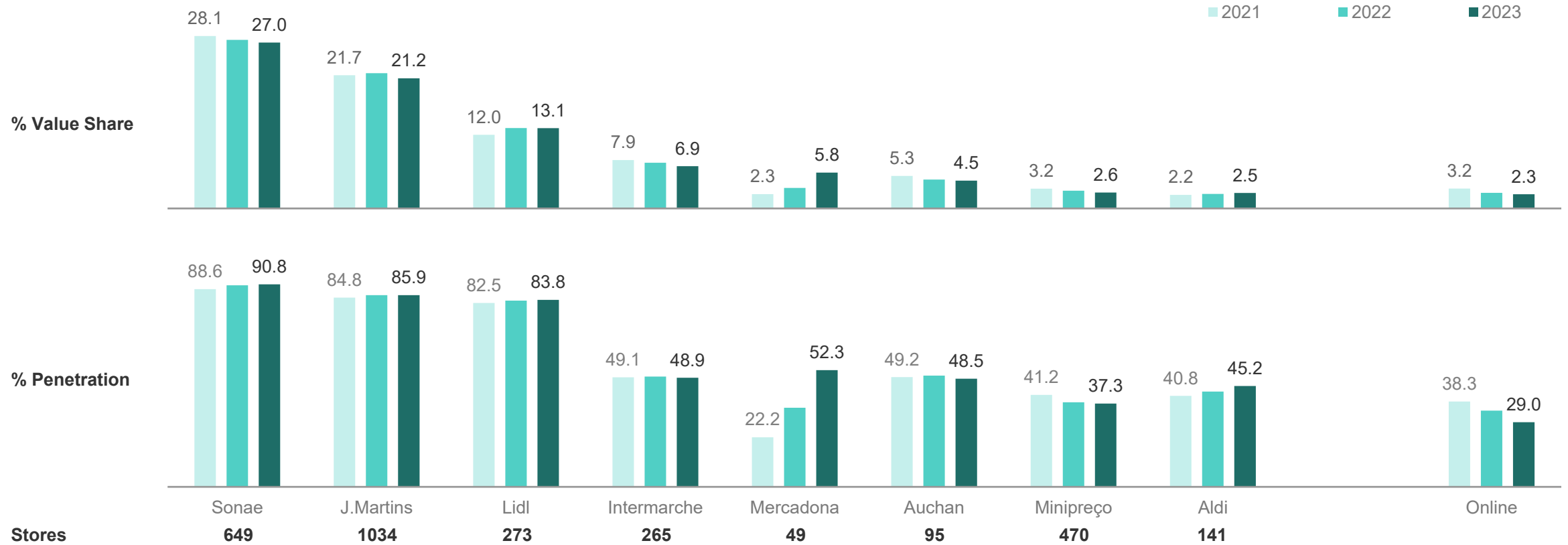
PL will continue to grow, but at a slower pace

FMCG w/o Fresh Food | PL and MB Value Share



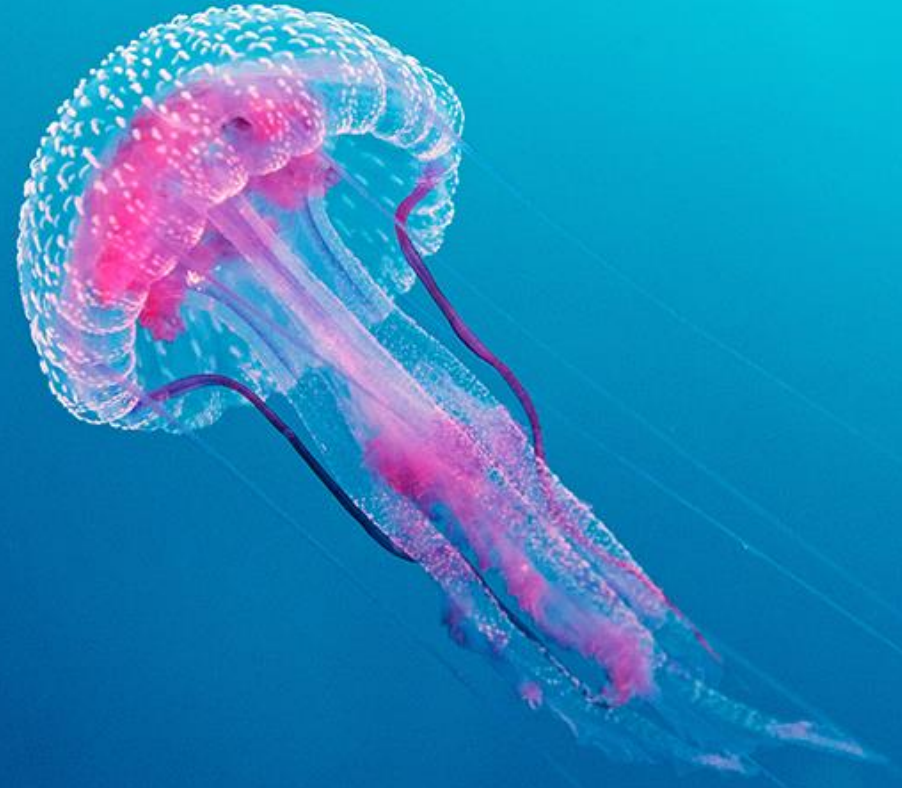
And when retail value is changing hands

FMCG | Main Retail KPI's



2

Which currents to take advantage of?



Which currents should we take advantage of within **COD** market?

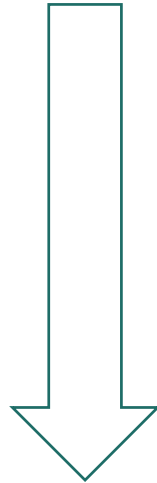


Reinvent Cod could bring consumers back: new need, new uses, less waste

COD PURCHASE VS COD CONSUMPTION |
2023 VS 2019

IN-HOME PURCHASE OCCASIONS EVOL |
YTD P10 2023 VS YTD P10 2019

In-home
purchase



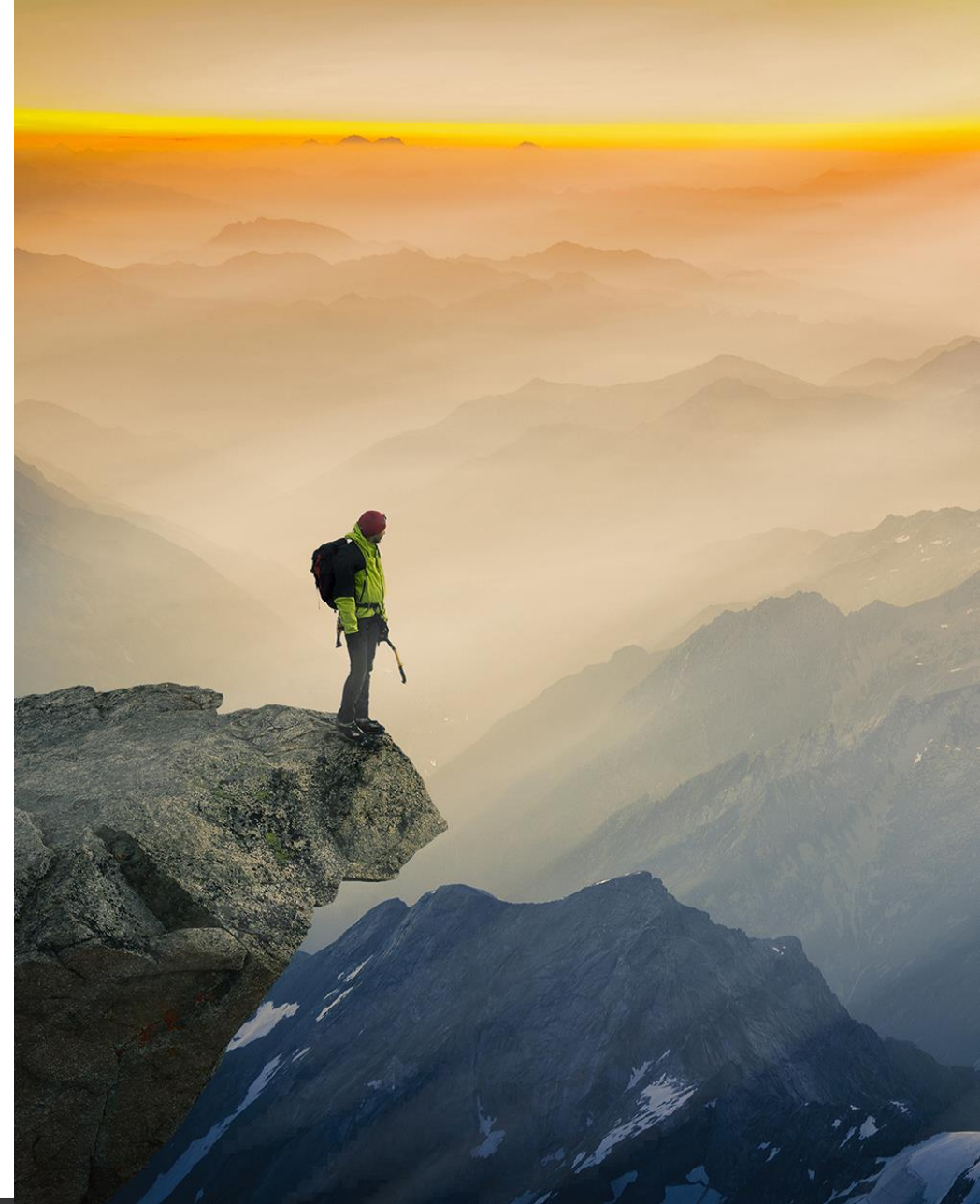
In-home
consumption



Gluten free

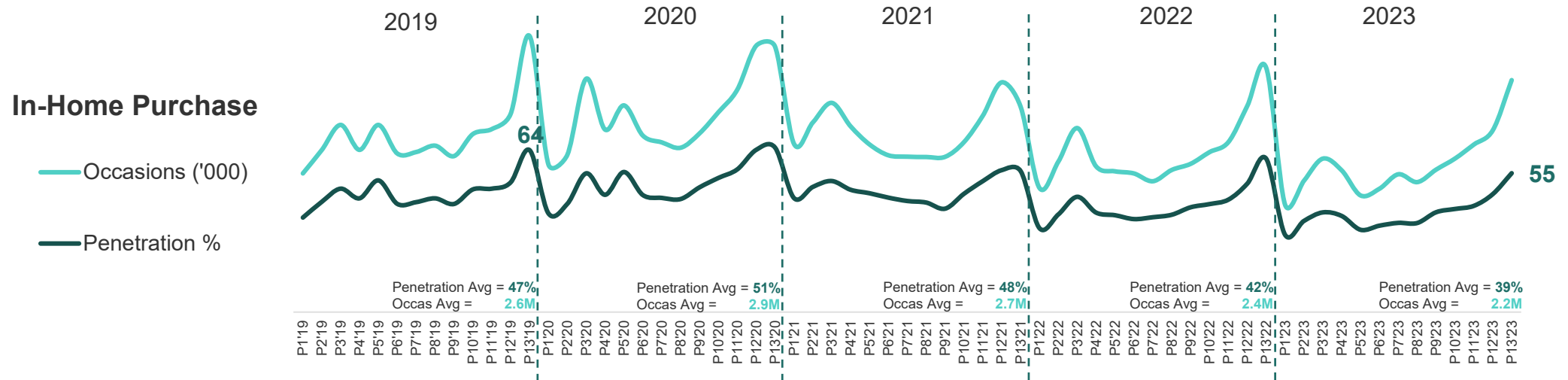
Lactose free


Low Salt



Go beyond the traditional moments: Xmas and Easter & lunch and dinner

IN_HOME PURCHASE & CONSUMPTION | PURCHASE PENETRATION & OCCASIONS



Lunch
for every 100 servings,
6 are with cod 

Cod “share of
stomach”



Dinner
for every 100 servings,
3 are with cod



Innovation is an indispensable lever to recruit and go further

72% of portuguese HHs claim **+12pts** Vs 2019

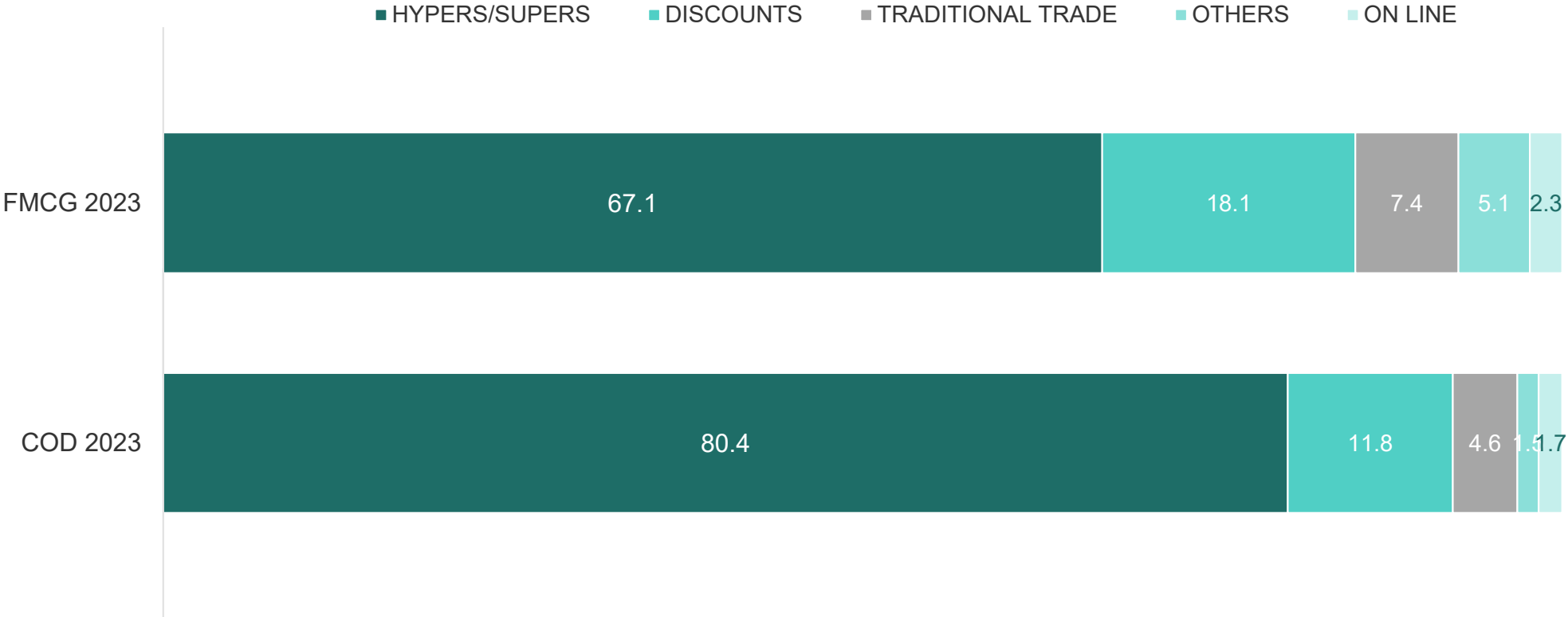
I prefer speed and an easy preparation

In-home consumption

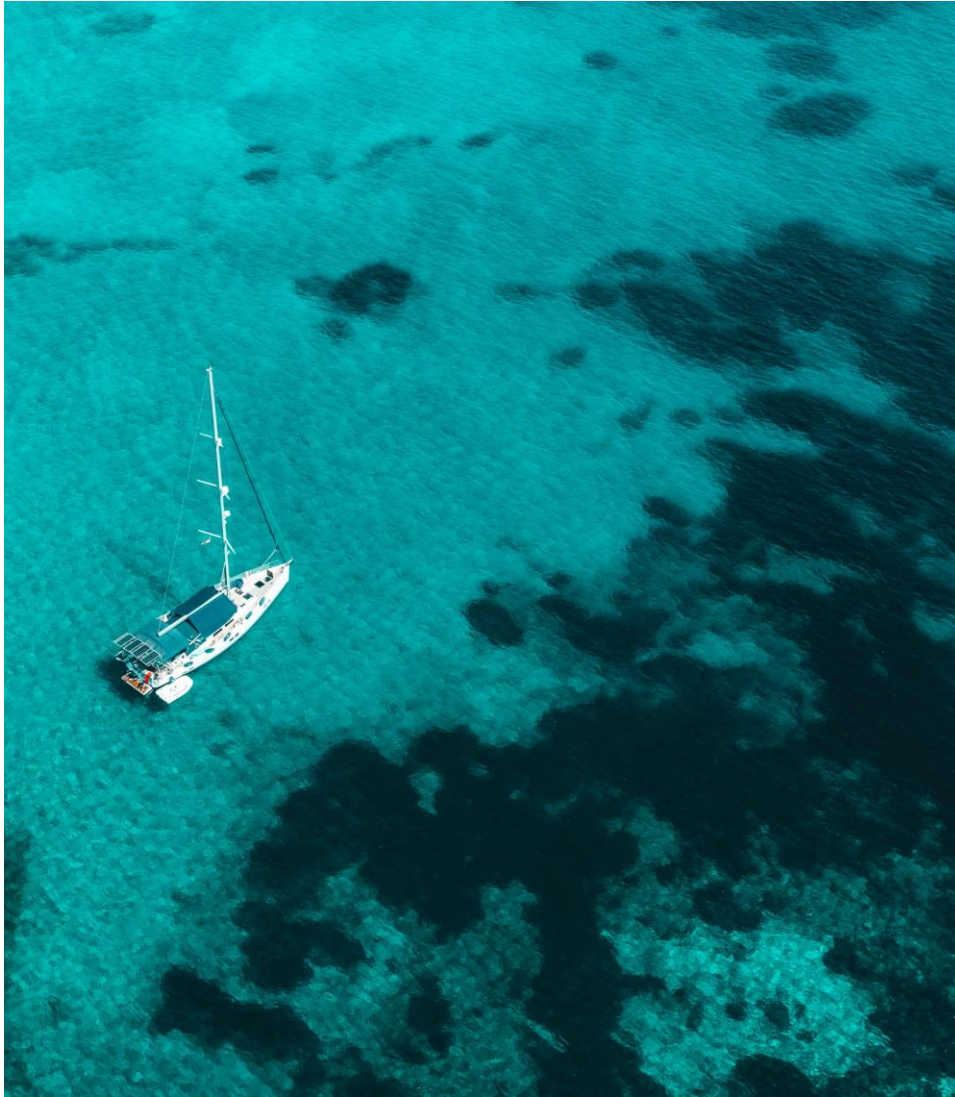


With a more fragmented shopper, ensuring an optimized assortment in all types of stores is mandatory

Dried Cod vs T. FMCG | Channels Value Share (%) | 2023



Currents to navigate...



more
NEEDS



Deliver an unique value-added proposal:

By understanding and adjusting to consumer preferences across categories both in and out of home, exploring new territories.

more
MOMENTS



Expand offer for more moments throughout the day:

By mapping current and potential consumption opportunities throughout the day.

more
PRESENCE



Adapt the assortment to the fragmented shopper: to convert all shopper visits into more buyers for cod.

more
CATEGORIES



Surprise the shopper: Make cod sexy! Through innovation or new territories, to attract new/more buyers.



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Thank You
Obrigada

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