

Wholesale Market Report 2021

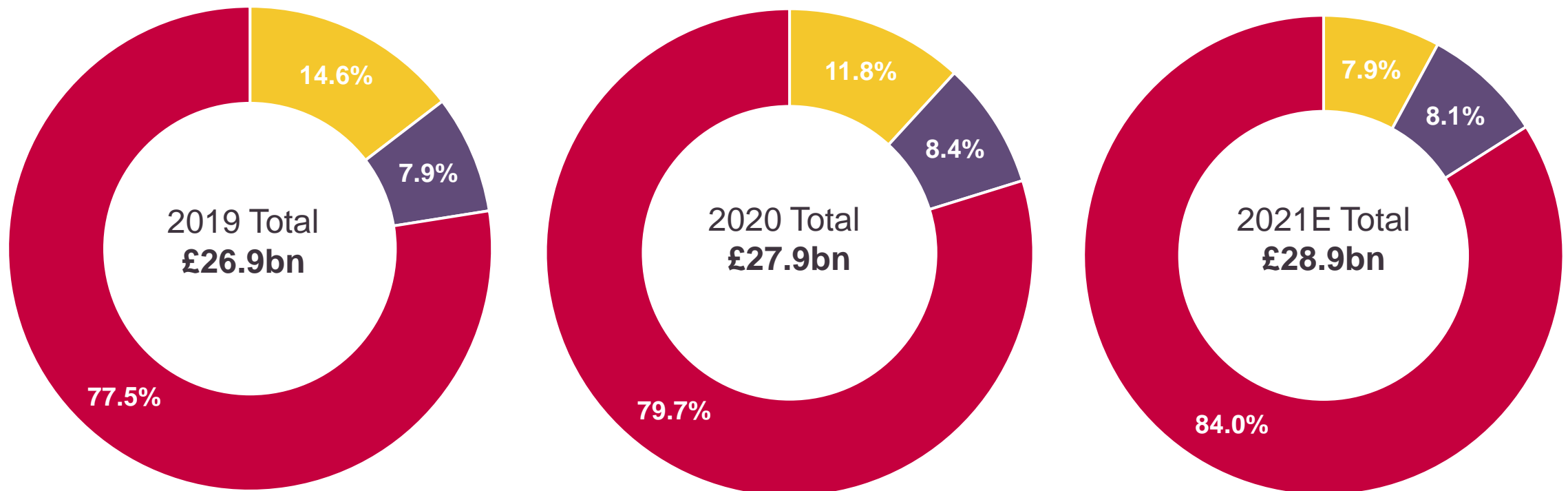
Sample brochure



LEADING WHOLESALERS VALUE BY SUB-CATEGORY

Leading traditional wholesalers grow share of combined value by +6.4ppts to 84%, amidst the boost seen as a result of the coronavirus pandemic. Foodservice wholesalers Brakes and Bidfood have seen their combined share of the top 9 leading wholesaler turnovers decline by -6.6ppts to just 7.9%.

■ Foodservice ■ Hybrid ■ Traditional

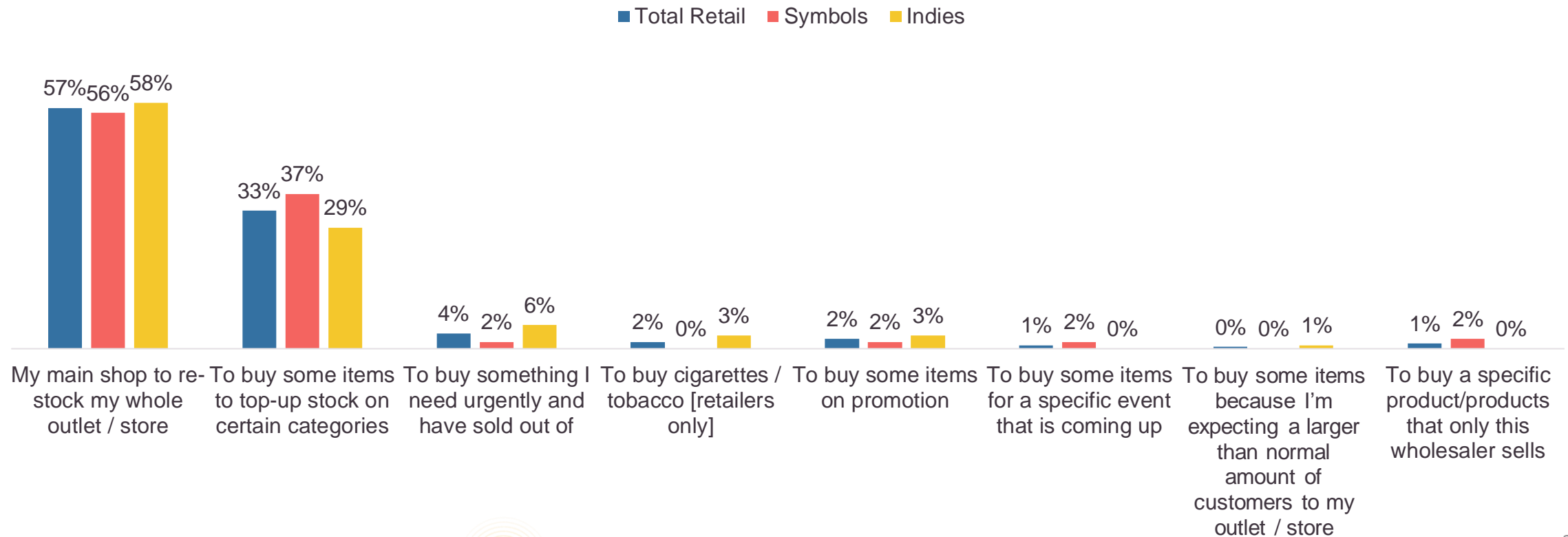


Source: Lumina Intelligence, December 2021

OVER HALF OF RETAILERS ARE ON A MAIN SHOP MISSION

56% of symbol retailers and 58% of independent retailers were on a main shop mission to re-stock their whole store, as a reason for their last shop. A third of retailers were on a top up mission (37% symbols vs 29% indies). The number of retailers on an main shop mission has increased by 10ppts since March 2021.

Which one best describes the reason for your last shop?

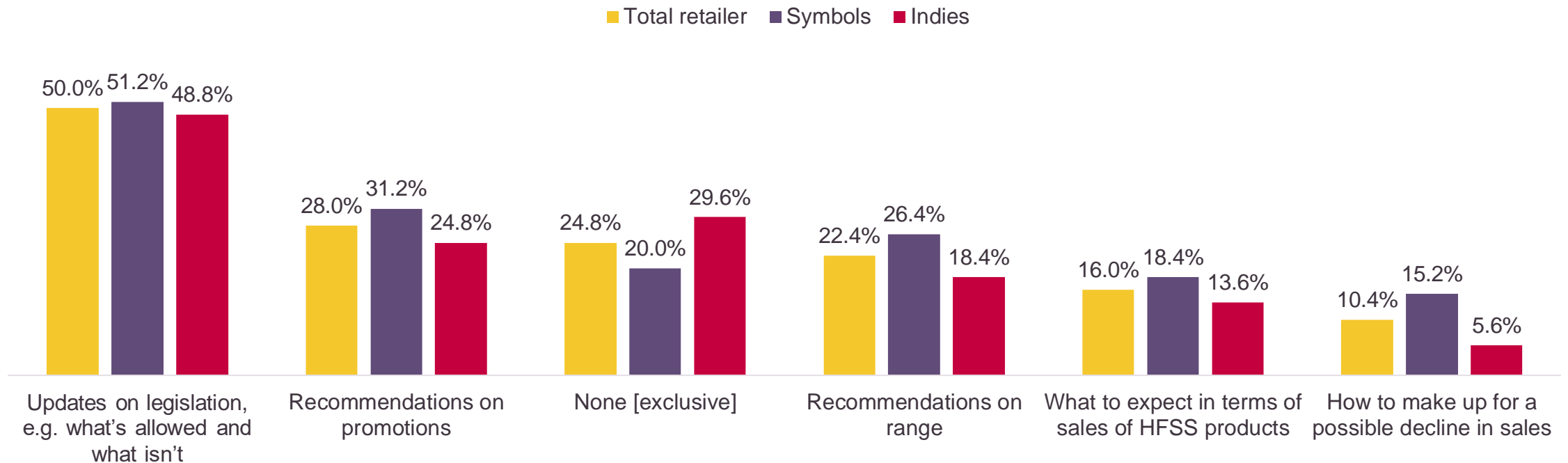


Source: Lumina Intelligence Wholesale Market Report, December 2021

HALF OF RETAILERS EXPECT UPDATES ON LEGISLATION

50% of total retailers expect updates on legislation, in order to understand what is and isn't allowed in stores. With chilled foods, bakery, crisps, snacks, soft drinks and confectionery, amongst others, heavily affected by the new legislation, it is important retailers are well informed of the impacts this will have. Wholesalers can achieve this by creating regular newsletters and webinars informing retailers on how to adapt to new HFSS regulations. Wholesalers should signpost retailers towards trade bodies including the ACS and FWD for further updates on legislation.

What kind of support do you expect from wholesalers around HFSS legislation?



Source: Lumina Intelligence Wholesale Market Report, December 2021

FOODSERVICE CUSTOMERS SHOW HIGH SATISFACTION

Foodservice operators are on the whole satisfied with their experience, with scores 1-4 (1 being very poor) selected by very few operators on each metric. There are some areas which are lagging behind on the higher end of the scale, notably inspiration and recipe ideas which could be for a quick win area for wholesalers. Brakes have launched a winter food festival which offers operators across foodservice a range of practical ideas and offers tips on how to make the most of opportunities such as Veganuary.

Please rate [wholesaler] on the following based on your experience on a scale of 1-10, where 1 is very poor, 5 is acceptable and 10 is outstanding

	1	2	3	4	5	6	7	8	9	10
Accurate invoicing and billing	0.0%	0.0%	0.0%	0.6%	6.2%	4.3%	5.6%	19.9%	15.5%	41.6%
An easy to navigate website	1.9%	3.1%	0.0%	1.2%	7.5%	5.0%	5.6%	11.8%	13.0%	29.8%
Loyalty schemes	5.0%	2.5%	2.5%	1.9%	11.2%	5.0%	8.7%	10.6%	8.1%	19.3%
Inspiration and recipe ideas	1.9%	0.6%	1.2%	3.1%	16.1%	8.7%	14.3%	10.6%	6.8%	13.0%
Information on latest trends in the sector	0.6%	1.2%	1.9%	1.9%	11.8%	6.8%	18.0%	13.0%	8.1%	17.4%
Product information and latest new products	0.0%	0.0%	1.2%	1.9%	14.3%	5.6%	14.3%	19.9%	7.5%	18.0%
Category advice	2.5%	0.0%	1.2%	3.7%	9.3%	8.7%	16.1%	18.6%	6.8%	18.0%
Information on top sellers	0.0%	0.6%	0.6%	2.5%	13.0%	7.5%	12.4%	19.3%	8.7%	21.1%
Value for money	0.0%	0.0%	2.5%	0.6%	10.6%	6.8%	21.7%	26.7%	8.1%	19.3%
Prices	1.2%	0.6%	2.5%	0.6%	11.2%	6.8%	22.4%	24.2%	9.3%	16.1%
Guaranteed availability of products	2.5%	1.2%	1.2%	1.9%	18.6%	7.5%	18.6%	23.0%	8.1%	14.9%
Quality of products in general	0.0%	0.6%	0.0%	0.6%	6.8%	4.3%	11.2%	30.4%	13.7%	31.1%
Range of products	0.6%	1.2%	0.0%	1.9%	10.6%	5.6%	13.0%	30.4%	9.3%	25.5%
Ordering process	0.6%	1.2%	0.0%	0.6%	9.9%	1.2%	9.9%	23.6%	9.9%	29.8%
Friendliness of drivers	1.2%	0.0%	0.0%	1.9%	9.3%	1.9%	8.7%	19.3%	9.9%	29.8%

Source: Lumina Intelligence Wholesale Market Report, December 2021

SUSTAINABILITY AND INNOVATION ARE TOP PRIORITIES

Local living, food poverty, waste and shortage awareness has shined a light on sustainability in 2021. Particularly for eating out professionals, sustainability is being prioritised. Innovation is also set to be key in the next year with 89% of surveyed eating out professionals listing it as an initiative being prioritised.

Are any of these initiatives being prioritised in your business in the next 12 months?



Source: Lumina Intelligence Top of Mind Business Leaders Survey, July 2021