VEGPOWER

Healthfulness

Market Insight Report
Edition 2: February 2022

Is healthfulness the key to increased consumption and market growth for vegetables?

+ Market data update

Healthfulness

[**helth**-f*u*hl-ness] *Noun*

the quality of promoting good health

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Veg Power is only made possible by generous support of our members:

Introduction

Dan Parker
Chief Executive, Veg Power

Our second Market Insight Report considers whether promoting good health is an effective message to increase vegetable consumption. The pandemic has certainly put health at the forefront of people's concerns, whilst at the same time, recent figures show childhood obesity levels to have risen sharply over the pandemic to the highest levels in 10 years.

This report presents our first attempt to segment vegetable consumers into a small number of groups with clearly understood consumption patterns, attitudes, and motivations. Such segmentation is far from a perfect process - we can only take the available data, generalise, and simplify, and so inform our future actions. We'd very much welcome feedback from our members and supporters to help refine these models to maximum effect.

The second half of this report analyses the retails sales data kindly donated to us by IRI Worldwide. This data covers multiples but not discounters, independent and small-scale channels such as box schemes. The data to the end of 2021 gives interesting insight compared to the height of the pandemic in 2020 and the two years before the pandemic. It will take another year of data before we can really see the lasting effect of the pandemic on vegetable consumption, but we have picked out three trends.

1 Billion additional child portions

Firstly, a good deal of volume has been retained but there has been significant downward pressure on per unit price. Analysis from Kantar suggests that households in lower, but not lowest, income brackets, are managing the squeeze of higher grocery prices by buying less vegetables overall and more on offer. We'll be reporting on that in more detail in our next report. We've supplemented this with a You Gov survey which confirms the hypotheseis and suggests a worrying trend of poorer diet for those tipping from just-about-managing to food insecurity.

Most likely directly related to that, there is a significant increase in the variety of frozen veg as hard-pushed consumers look for value, also confirmed by a You Gov survey.

On the brighter side, much of the gain in scratch-cooking ingredients during the pandemic has been retained. We suspect this will be the better-off work-from-home middle income households.

Finally, some more good news: we have recently completed econometric analysis of retail sales data over the last four years to calculate the impact of our work. The consumer insight specialists at Pearl Metrics conclude that our work has directly generated an additional £92m in veg sales through multiples, equivalent to nearly 1 billion additional child portions. Exciting news, but we have a long way to go. We hope that the findings in this report and our market segmentation will better inform both Veg Power and the market as a whole to increase vegetable sales.

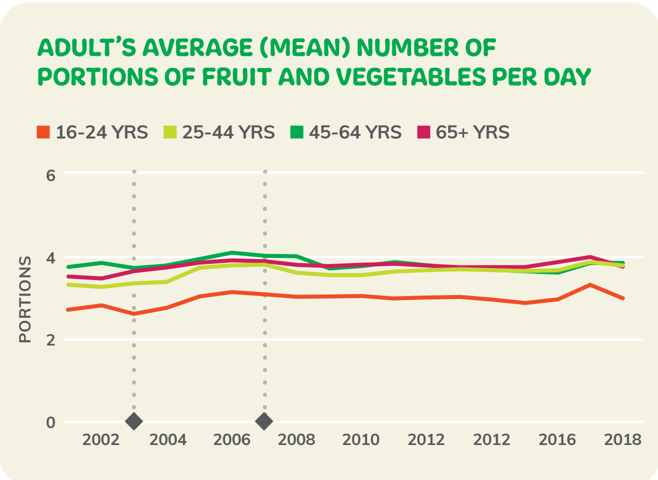
Where we're at with 5-a-day

90%[1] OF PEOPLE KNOW THEY SHOULD EAT 5-A-DAY AS PART OF A HEALTHY DIET.

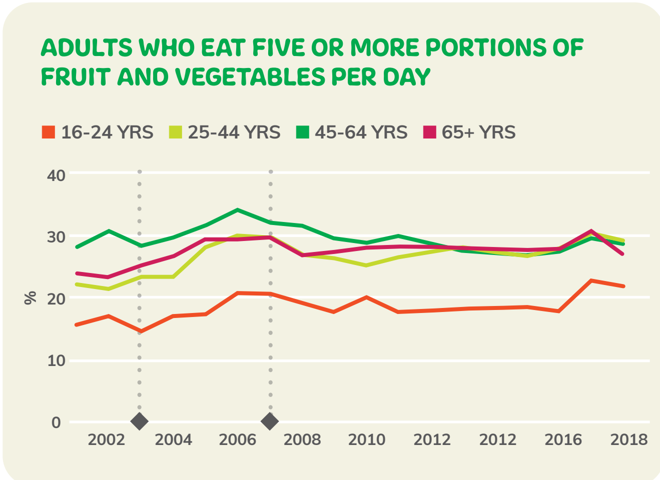
That message has been successfully communicated over the course of this century. The problem is... knowledge hasn't translated into action.

In fact, between 2006 and 2018, intake barely changed. No section of the population averaged above 4 portions. For 16 – 24 yo's, the average was just 3 portions.

When we look at the percentage of the population who do eat 5-a-day, the trend lines are also stubbornly flat. The figure overall is 28%. Once again, it's significantly lower amongst the youngest age group.



SOURCE: NHS Digital



SOURCE: NHS Digital

The latest Health Survey for England data is from 2018. But recent research by ASDA suggests nothing has changed. In a study conducted at the end of last year, it found just 27% of people were eating the recommended 5-a-day[2].

If 5-a-day is a key barometer, we're not making much progress. We've been stuck at a figure just below 30% for 15 years now.

[1] *Rooney et al, 2016, How much is '5-a-day'? A qualitative investigation into consumer understanding of fruit and vegetable intake guidelines. Available for download: https://pubmed.ncbi.nlm.nih.gov/27334026/*
[2] *https://corporate.asda.com/20220106/our-new-delicious-one-pot-vegetable-recipes-make-it-easier-to-get-your-five-a-day*

Where we're at with 5-a-day

It's easy to assume that this percentage is always made up of the same people. But that doesn't seem to be the case – at least not during the pandemic.

With a consistent panel of approx. 1,000 adults and children, the National Diet and Nutrition Survey Rolling Programme allows us to compare an individual's claimed diet in Aug – Sept 2020 with their claimed diet at the time of their original NDNS RP interview (on average, 2 years and 7 months earlier i.e. the beginning of 2018.)

Whilst the sample size is relatively small, the NDNS RP data suggests that:

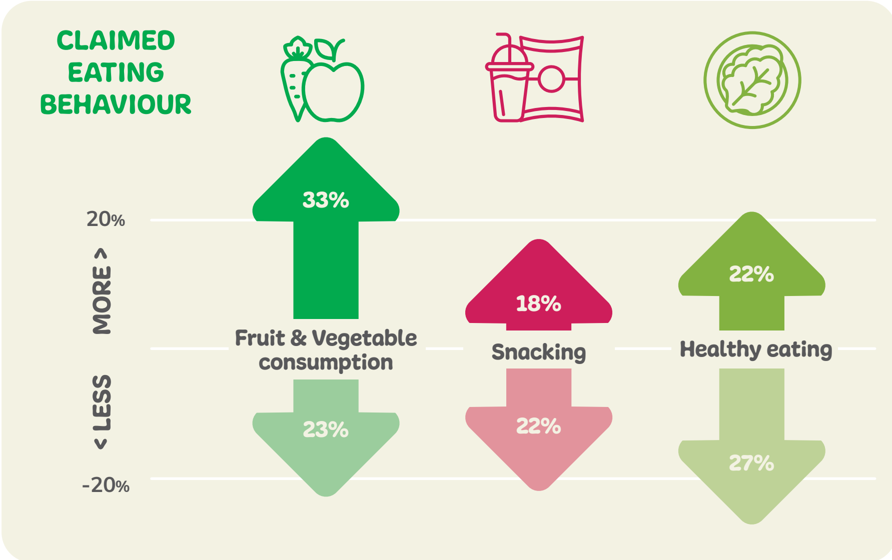
1. There is a high degree of churn in terms of those eating 5-a-day. Based on these findings, the percentage who are consistently committed is much lower than 28%. It might be as few as 10 – 15%.
2. There is a larger number (c. 20 – 25%) who seem to be conscious of the benefits of 5-a-day but meet the target only intermittently. For any number of reasons, they fall in and out of the habit.
3. Confronted by the pressures of COVID, more people deserted 5-a-day than adopted it. This was true across age groups but particularly amongst adults.

5-A-DAY BY AGE	Average portions of fruit & veg per day	% who have STOPPED ACHIEVING 5 a day	% who have STARTED ACHIEVING 5 a day
Children 11 - 18	2.8	10%	8%
Adults 19 - 64	3.7	18%	7%
Adults 65+	4.5	17%	12%

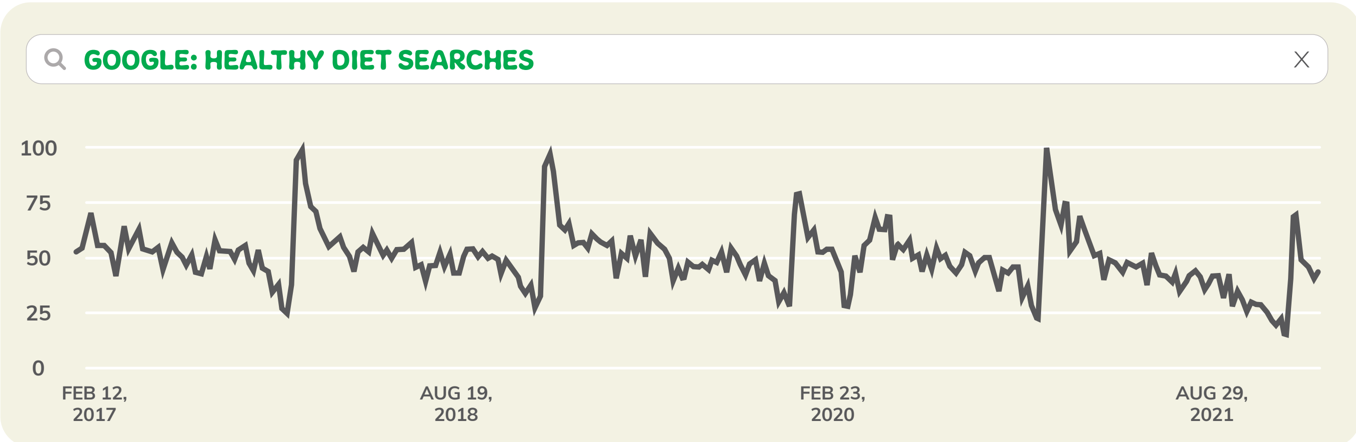
SOURCE: National Diet and Nutrition Survey

Research conducted by ZOE/BNF in June 2020 underlines these points. In the first few months of the crisis, people responded in markedly different ways – and often not for the better.

Google Trends throws further light on this. If we examine topic searches for 'healthy diet' over the past 5 years, we see the predictable New Year resolution peaks – and a slightly lower one at the start of the first lockdown. But over the period, the trend line seems to be pointing slightly down.



SOURCE: King's College London, study of data from ZOE COVID Symptom Study app in the UK and US, before (Feb 2020) and during (July/ Sept) the pandemic.
More details: https://www.kcl. ac.uk/news/lockdown-used-unhealthy-lifestyles-healthier
British Nutrition Foundation, survey carried out by YouGov, 3rd-4th June 2020.
More details: https://www.nutrition.org.uk/ press-office/pressreleases/lockdownsurvey.html



SOURCE: Google Trends

As DEMOS and the Food Standards Agency stated in March 2021:

Like the health impact of the virus, our experiences of food have diverged widely during the pandemic".[3]

There has been a clear bifurcation in terms of consumption behaviours. This isn't simply about people indulging themselves with the odd biscuit. For many vulnerable sections of society, the health consequences have been severe.

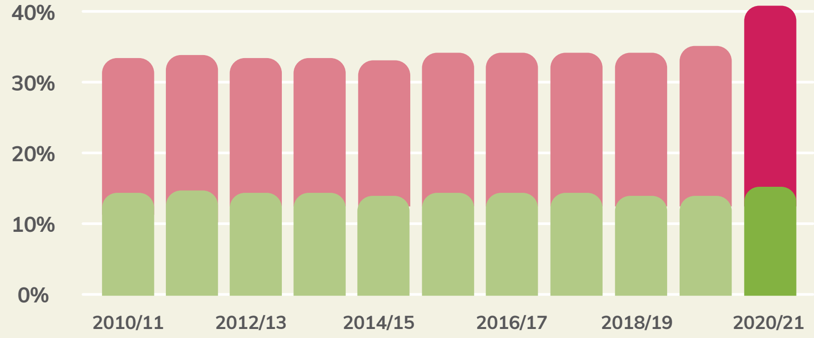
[3] *Renew Normal: The People's Commission on Life After Covid-19, DEMOS and the Food Standards Agency. Available for download: https://demos.co.uk/renew-normal/*

Data from NHS Digital indicates a marked rise in childhood obesity:

- In **2019-20**, at the start of primary school obesity rates were **10%**, climbing to **21%** in Year 6.
- After **10** flat years, these figures rose sharply during the first year of the pandemic. In **2020-21**, the rate at the start of primary increased to more than **14%**, rising to over **25%** in Year 6.

ESTIMATE OF CHILD OBESITY JUMPS DURING COVID

Proportion of **overweight** and **obese** children in their final year of primary school in England



2020/21 estimate based on measurements from 24% of children rather than entire school year

SOURCE: NHS Digital National Child Measurement Programme in England

NHS Digital also found that these rates were up to twice as high in the poorest areas. These are horrendous statistics. They clearly flag why it is so critical that we support increased veg consumption amongst Lower Income Households. That's why we're working with Kantar to investigate this under-analysed section of the population. Expect to hear more in the spring.

Attitudes towards healthy eating: the 5 key segments

Developing an accurate and actionable segmentation is the foundation of effective marketing. It allows us to prioritise target audiences, and ensure we are communicating the most effective messages to each.

For our sector, understanding people's attitudes towards healthy eating – and the barriers that prevent positive intentions from turning into positive actions – needs to be the starting-point for any segmentation.

Veg Power doesn't yet have all the answers. This is a focus area for us in 2022 and we intend to undertake further research later in the year. We need to size the segments more accurately and gain better insights into the qualities and values that define each.

But we do have some clear hypotheses.

Our examination of people's 5-a-day habits indicated the first two segments:

1. The 10 – 15% of the population who are consistently committed to eating 5-a-day. Let's call this segment the **Attentive Adopters**. They've listened to all the messaging, taken on board the proven health benefits and adapted their behaviour accordingly. Maybe they just love veg!

2. The 20 – 25% of the population who are conscious of the benefits, are predisposed towards eating 5-a-day but fail to do so on a sustained basis. Perhaps sometimes life just gets in the way. For obvious reasons, we call this segment the **Fitful 5-ers**. We need to nudge and support them with simple solutions towards their good intentions.

What of the remaining 65%?

IGD has been tracking people's attitudes towards adopting "a healthier and more sustainable diet" for the last three years. The latest findings were published in July 2021:

APPETITE FOR CHANGE	Nov 19	July 21	Change
Wouldn't consider changing	13%	16%	+3
Haven't thought about this	21%	27%	+6
Thinking about doing this	30%	23%	(7)
Already making some changes	36%	35%	(1)

SOURCE: IGD 2021 Appetite for Change July 2021

43% OF PEOPLE ARE EITHER ENTRENCHED IN THEIR CURRENT DIET OR SIMPLY AREN'T THINKING ABOUT IT.

It's noteworthy that this percentage has risen by almost 10 points since the start of the pandemic.

This gives us our third and largest segment. **Dietary Diehards** represent around 40% of the population.

It's not necessarily that Dietary Diehards are unaware of the benefits of healthy eating. Most will have heard and understood the messaging around 5-a-day.

It's more that healthy eating simply isn't a priority – or, very often, isn't something they can afford to make a priority. Money, time and knowledge are all significant barriers. But so, probably, is desire. Turning around the diet of this group is one of the great public health challenges of our time, and as people feel the squeeze of higher prices more may slip deeper into this profile. It is a complex issue; emotional, environmental and financial. What Veg Power can do is to make it as easy as possible to make a healthier choice by supporting them with achievable inspiration and educating them with highly accessible and relevant knowledge to overcome the barriers of time, convenience and budget.

We know from the recent ASDA research that:

67% of people find healthy eating a challenge, because...

33% of people feel veg can be too expensive.

29% of people feel they lack the skills for scratch cooking.

19% of people feel veg-based meals are boring.

The IGD research identifies 23% of the population as being in the market for change. They are thinking about moving to a healthier and more sustainable diet...but have yet to do so.

This percentage is repeated in the findings of Wave 19 of the FSA's COVID-19 Consumer Tracker from October 2021.

24% of adults aged 16-75 say that "thinking generally, they have some concerns about the food they eat at the moment".

These people skew heavily young and heavily upmarket. Amongst those aged 16 – 34, the percentage rises to 33%. The same figure applies to those in the AB class.

Importantly, the FSA Covid Tracker shows that this 24% are concerned by different things. Just over half specifically referenced "the 'healthiness' of food in their diet (e.g. the number of calories, fat, sugar or salt in the food they eat or its nutritional content)".

These people skew upmarket but tend to be older rather than younger. The other half are more concerned by ethical topics including sustainability, food waste and animal welfare. These concerns tend to be more evident in younger consumers.

These insights provide our fourth and fifth segments:

Approximately 12.5% of the population are **Hesitantly Healthy**. They are actively thinking about changing their diet to eat more healthily – but have yet to receive the right stimulus to convert consideration into action.

An approximately equal percentage are **Ethically Engaged**. They are concerned about the environmental and social impact of their dietary choices. This is the segment most likely to flirt with initiatives like Veganuary. But again, they have yet to change their behaviour on an on-going basis. We believe seasonality is an important message for this group.

Such segmentation is far from an exact science and the available data only shows us half the picture, but we can get a general sense of the size and motivations of the different segments. This better informs our marketing decisions today and highlights the gaps in our insight that we need to address for tomorrow.

Dietary Diehards

40%

Face significant barriers to a healthier diet
We need to make it as easy as possible

KEY MESSAGES:
CONVENIENCE, SIMPLICITY

Attentive Adopters

12.5%

Consistently committed to eating 5-a-day

KEY MESSAGES:
SEASONALITY

Hesitantly Healthy

12.5%

Thinking about a healthier diet

KEY MESSAGES:
HEALTH, CONVENIENCE

Fitful 5-ers

22.5%

Conscious of the benefits, but life gets in the way

KEY MESSAGES:
CONVENIENCE

Ethically Engaged

12.5%

Thinking about a more sustainable diet

KEY MESSAGES:
SEASONALITY

What the segmentation implies for 'health' as a marketing message

Eating more veg is an undisputed good. When coupled with less meat it brings environmental advantages, but the primary benefit is what it will mean for our health as individuals and as a nation.

'Healthfulness' is therefore an important tonal value that the sector should always lean into. But this doesn't mean that 'health' should be the primary message in our marketing efforts. The research we've conducted for this update starts to explain why:

Conclusions

1 There is already almost universal awareness that eating 5-a-day is good for our health. Since 2006, consistent reinforcement of this message has failed to increase the percentage actually doing so. If anything was going to move the needle, it was COVID-19; it's had a scale and impact that no marketing campaign could hope to replicate. But this simply hasn't been the case (apart, perhaps, amongst a small and distinctly more affluent section of society). There's no reason to believe that beating this drum further will lead to a different outcome.

2 Health will have little or no impact on either **Attentive Adopters** or **Dietary Diehards**. We will either be preaching to the converted or our messaging will fall on deaf ears.

3 There may be some upside in terms of **Fitful 5-ers** and the **Hesitently Healthy**. We need to convince the former to turn the occasional into the regular, and we need to nudge the latter over the intention/behaviour gap. But it's debatable whether health messaging is the best way to achieve either objective; the likelihood is that we'll simply be telling both segments things they already know. There are more important friction-points to overcome, some of which are now even greater obstacles than they were pre-pandemic.

4 Whilst eating healthily is an important story to tell the **Ethically Engaged** (especially those experimenting with poorly balanced vegan diets), other strategies may generate a stronger response. This is a particularly important segment for us given its youthfulness; it represents an above-average proportion of tomorrow's consumers. We need to redouble our efforts to find comms that will really cut through.

As we've said, more work is required to refine and flesh out our segmentation. But the indications are that 'health' is not a topic to be tackled head-on. We've been down that road many times already. Doing so again will be an ineffective use of resources, resulting in missed opportunities to change behaviour at scale.

Veg Power believes that the sector will gain greater traction by:

a. Communicating related but more engaging, actionable messages like 'vitality' and 'seasonality'.

b. Forcefully addressing the key barriers to change. Convenience is foremost amongst these and will be the subject of a future update.

SOURCE: Analysis of retails sales value and volume data kindly supplied by IRI Worldwide

Retail sales insight

Food

Volumes returning to pre-pandemic levels with significant average price increases

TOTAL FOOD	Volume	Value
2021 v 2018	2.7%	7.4%
2021 vs 2019	3.1%	7.2%
2021 vs 2020	-1.2%	-0.1%

Unit volume sales have now dropped back but are well ahead of the levels seen pre-pandemic. Whilst volumes declined towards the end of 2021, unit sales in Q4 were still 1.6% up on the same quarter in 2019. Assuming society continues to return to something more like normality, our prediction is that volumes will revert to pre-pandemic levels over the course of this year.

There has been much recent publicity about price inflation in food, and our data underlines the point. Value sales in 2021 were up 7.2% on 2019, with spend in Q4 being 6.8% higher than two years prior.

Vegetables

More veg at lower prices

TOTAL VEGETABLES*

	2021 vs 2020		2021 vs 2019	
	Volume	Value	Volume	Value
Q1	8.0%	4.2%	12.6%	8.9%
Q2	-6.1%	-9.5%	7.6%	5.7%
Q3	-4.3%	-6.2%	3.0%	-0.1%
Q4	-8.4%	-6.8%	2.3%	1.4%

The story is quite different in vegetables. Unit sales are down 2.8% on 2020 figures, but up 6.5% on 2019 and 5.2% on 2018. Over either timeframe, growth in consumption of vegetables has been double that for food overall.

Unfortunately, this hasn't pulled through to value. Spend on vegetables is down 4.7% on 2020, and only up 4.1% on 2019. In other words, share of spend has declined markedly. Whilst this mostly reflects lower price increases, the bottom-line is that households are paying notably less for more veg.

BASKET SHARE

	Volume	Value
2019	9.9%	6.6%
2020	10.3%	6.7%
2021	10.2%	6.4%

We see these trends clearly when we examine share of basket. By volume, vegetables held up well in 2021 and still command over one-tenth of the average basket. But share of spend has fallen back and is now lower than it was in 2019.

Over the first three quarters of last year, the average unit price for vegetables declined by 3.6%, 3.7% and 2.0% respectively compared to 2020. Whilst there was a small rally in Q4 (+1.8%), the year saw an overall drop of 2%.

Multiple factors could be driving this: a fall in base prices, deeper promotional offers, a move towards larger pack sizes or a preference for standard over "speciality" veg. Most likely it is a combination of all of these.

It will be very interesting to see what happens over the first half of this year. Post-pandemic, can vegetables maintain lasting growth without significant sacrifices in terms of pricing?

To better understand what's going on, we conducted a You Gov survey in February 2022 to investigate the influence of discounting and food inflation on people's claimed purchasing habits:

These findings should concern us all. We know people are really feeling the pinch and many are having to make hard choices. Too many families see vegetables as a non-essential item; they're certainly reluctant to purchase the extra bag that may well be required to achieve a healthier diet. On this evidence, there is a real risk that vegetables will be forfeited when households are confronted by higher bills at the checkout.

58%

I choose to buy fresh vegetables that are on promotion and/or are discounted

This increases to 64% in lower income families with kids (under £30k household income)

26%

I have bought fewer fresh vegetables lately because of the increase in price of my groceries

This increases to 49% in lower income families with children (under £30k household income)

SOURCE: You Gov, Feb 2022

* Total Veg is a measure of "portion veg" Inc. all frozen, all canned (exc. tomatoes) & fresh, sweet potatoes & salad "veg". Exc. potatoes, herbs, onions, chillies and garlic.

Winners & losers

Our winners and losers section looks at the change in unit volume and overall value (and thus the average unit price) for each major vegetable product.

This allows us to sort each product into one of four classes based on unit volume and relative value: **Winners**, **Discounted Growth**, **Managed Contraction** and **Loser**.

2021 VS 2020

Generally the pattern was declining volumes, all too often accompanied by declining prices.

We need to treat these figures with caution. 2020 was an extraordinary year, and 2021 marked the start of what will be a long journey back from the pandemic. However, this analysis provides a valuable benchmark against which we can track developments over the coming months and years.

Discounted Growth

Volume has increased with lower average unit prices.

Product	Unit Volumes	Value
Fresh Radish	3.9%	-9.5%
Frozen Beans	0.7%	-6.1%
Fresh Lettuce	2.7%	-0.8%
Canned Sweetcorn	1.9%	-0.4%
Fresh Prep Salad	2.5%	2.3%

Winners

Volume has increased with maintained or higher average unit prices.

Product	Unit Volumes	Value

No products increased both volume and average unit price

Losers

Volume has dropped with lower average unit prices.

Product	Unit Volumes	Value
Fresh Parsnips	-0.7%	-15.9%
Fresh Cabbages	-2.1%	-11.8%
Fresh Carrots	-4.4%	-13.0%
Fresh Cucumber	-0.2%	-8.8%
Fresh Sweet Pots.	-9.9%	-16.8%
Fresh Celery	-4.5%	-11.3%
Fresh Avocado	-0.7%	-6.5%
Canned Carrots	-9.4%	-14.5%
Fresh Cauliflower	-8.4%	-12.7%
Fresh Leeks	-10.2%	-13.7%
Frozen Peas	-8.5%	-11.6%
Fresh Peppers	-3.5%	-5.6%
Frozen Mixed Veg	-10.6%	-12.3%
Fresh Brcocoli	-2.1%	-3.4%
Fresh Sweetcorn	-5.3%	-5.6%
Canned Peas	-15.3%	-15.5%
Fresh Courgette	-3.4%	-3.4%

Managed Contraction

Volume has dropped with maintained or higher average unit prices.

Product	Unit Volumes	Value
Frozen Sweetcorn	-11.7%	-11.6%
Fresh Asparagus	-2.1%	-1.3%
Fresh Legumes	-3.3%	-2.4%
Fresh Mushroons	-5.8%	-4.4%
Fresh Tomatoes	-2.2%	-0.3%
Fresh Mixed Prep.	-2.8%	-0.5%
Fresh Other Root	-5.0%	-0.3%
Canned Mixed	-17.3%	-12.7%

2021 VS 2019

A comparison of 2021 to 2019 gives us a wider view and a better sense of how the market is settling after the shock of 2020. Overall, we can see a healthy increase in volumes - but this uplift has been too often gained through significantly lower unit pricing. Again, this needs a little caution. 2021 was far from a uniform year. The year started in lockdown; prices were then heavily discounted through to September; with some recovery in the final quarter as many supermarkets supported better prices.

The big question for 2022 is: can volume growth be sustained at commercially viable unit prices as the squeeze on household budgets increases?

Discounted Growth

Volume has increased with lower average unit prices.

Product	Unit Volumes	Value
Fresh Cabbages	16.9%	-7.2%
Fresh Leeks	11.5%	-9.6%
Fresh Parsnips	14.7%	-6.2%
Fresh Radish	15.9%	-4.3%
Fresh Carrots	6.8%	-10.4%
Canned Sweetcorn	23.3%	5.3%
Fresh Cucumber	10.3%	-4.3%
Fresh Celery	2.5%	-9.9%
Fresh Avocado	14.7%	2.2%
Frozen Peas	4.7%	-4.6%
Fresh Cauliflower	7.8%	0.1%
Frozen Sweetcorn	82.7%	70.9%
Fresh Lettuce	13.0%	9.0%
Fresh Sweet Pots.	5.0%	1.9%
Frozen Mixed Veg	8.2%	5.1%
Fresh Courgette	12.3%	11.2%
Fresh Peppers	10.8%	9.8%

Losers

Volume has dropped with lower average unit prices.

Product	Unit Volumes	Value

No products lost both volume and average unit price

Winners

Volume has increased with maintained or higher average unit prices.

Product	Unit Volumes	Value
Fresh Prep Salad	3.1%	3.7%
Fresh Sweetcorn	13.3%	14.9%
Fresh Legumes	4.5%	6.1%
Frozen Beans	22.7%	26.1%
Fresh Brcocoli	5.8%	9.9%
Fresh Mushroons	5.7%	10.2%
Fresh Tomatoes	4.9%	9.4%
Fresh Other Root	5.8%	17.1%

Managed Contraction

Volume has dropped with maintained or higher average unit prices.

Product	Unit Volumes	Value
Canned Peas	-7.7%	-3.4%
Fresh Mixed Prep.	-8.4%	-4.1%
Fresh Asparagus	-4.0%	2.8%
Canned Carrots	-15.8%	-8.0%
Canned Mixed	-18.6%	2.1%

The vegetable mix

The share of the vegetable basket between fresh, frozen and canned is worth a closer look:

Frozen's share has dropped back to pre-pandemic levels for both spend and volume. The increase in 2020 was likely due to the fact frozen offered greater durability and longer shelf life during the pandemic. Even at the height of lockdown, canned – somewhat surprisingly – did not benefit to the same extent. Overall, the category seems to be in slow decline.

What does stand out is the significant growth in volume for frozen sweetcorn and - to a lesser extent - frozen mixed vegetables and beans (even frozen broccoli, sprouts and parsnips, which are too small to register on our graphs, have done well.)

Is there a trend emerging? Again, we turned to You Gov for greater insight (sample of 2,000 people; research conducted in February 2022).

All in all, there is reasonable evidence to conclude that people are buying a wider range of frozen vegetables. Convenience and affordability will be key drivers of this, especially for lower income families.

With most frozen vegetables coming in at 75p-£1.50 per kilo (ie half the price or less of their fresh equivalent), frozen may be the key to keeping vegetables on the menu in households struggling with the increased cost of living.

THE VEGETABLE MIX VOLUME

	Fresh	Frozen	Canned
2018	90.4%	5.1%	4.5%
2019	90.5%	5.2%	4.3%
2020	89.9%	5.7%	4.4%
2021	90.6%	5.3%	4.1%

26% I have bought a wider range of frozen vegetables recently

This increases to 42% in lower income families with kids (under £30k household income)

48% I choose frozen vegetables because they are more convenient than fresh vegetables

This increases to 62% in lower income families with children (under £30k household income)

Scratch cooking

When people cook from scratch, they invariably eat healthier meals. That's why we keep a close eye on a basket of healthy scratch cooking goods (such as raw meat, garlic, herbs, canned tomatoes but not cake ingredients).

SCRATCH COOKING INGREDIENTS SHARE OF OVERALL BASKET

	Volume	Value
2019	8.9%	13.9%
2020	9.6%	14.6%
2021	9.4%	15.4%

By volume, our 2021 healthy scratch cooking basket is down 3.7% on the highs of 2020 but still up 9.2% on 2019. Value has done even better. These are very encouraging signs, most likely linked to more working from home.

It's a habit we'll be working hard to encourage in 2022 with campaigns such as Stir Fry Frenzy, Breakfast Boost and One-Pot Wonders. These will be designed not only to inspire, but also to educate and address the convenience concerns that often stand between good intentions and action.

Veg Power: next steps

It's coming up to five years since we founded Veg Power and our flagship campaign Eat Them to Defeat Them, in partnership with ITV, has just started its fourth year – over 1 million children will be receiving a wall chart and sticker pack and enjoying activities in their schools and adverts on telly.

Recent econometric analysis shows that our work has generated an extra £92m in retail sales which we estimate to be equivalent to 1 billion additional children's portions. This is terrific, but it is only one extra portion per primary school child per week and our goal is one more per day for everyone.

Insight is essential. By segmenting the audience into five distinct groups with different consumption patterns, motivations and challenges we are, of course, simplifying things but it allows us to be more effective.

The key theme which comes through above all is convenience, or more precisely making it as easy as possible to eat more veg. We are developing a new comms stream called Simply Veg which gives people easy, quick, affordable, accessible and less-stress tools and techniques to overcome those barriers.

Our second important theme is seasonality as we believe it turns the desire for personal and environmental health into real veg in people's mouths.

Here are our plans for 2022 with themes of convenience and seasonality:

1 Million children taking part

Lunchbox Hacks

Simple steps for a healthier lunchbox

JAN/APRIL/SEPT 2022

STIR FRY FRENZY

How to make a quick and simply stir fry from almost anything

JANUARY 2022

Breakfast Boost

A great start to the day with veg breakfasts

MAY 2022

Salad Sticks

Turn summer salads into finger food

JUNE-JULY 2022

Home deli Lunches

Deli style lunches in less time than it takes to queue

OCTOBER 2022

One-Pot Wonders

Tips and tricks for easy one-pots

NOVEMBER 2022