VEGPOWER

# The Importance of Role Modelling

**Market Insight Report**
**Edition 5:** July 2023

What is shaping children's veg consumption? Findings from our new research.

+ Market data update

**Credits**

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Veg Power is a not-for-profit alliance founded in 2018 to turn around vegetable consumption in the UK. 80% of our children are not eating enough vegetables, with a third eating less than one portion a day. Our mission is to inspire kids to love vegetables and to share that joy with their parents today and their own children tomorrow.

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

# Contents



# Executive Summary

**Food prices are now front and centre of the cost-of-living crisis. In May, food inflation was running at 18.3% - nearly 10 points higher than Consumer Price Index. ONS data and Kantar data in July give hope that it may have peaked and that inflation (though not prices) is starting to drop - good news.**

Like mortgage and rental costs, food inflation has a disproportionate effect on lower income families. As we saw in our Christmas report, many normal working households are having to make radical changes to how they shop and what they buy. Given its perceived disposability, veg is often one of the first things to slip out of the basket.

With the situation worsening, this felt like the right time to examine how the cost-of-living crisis is affecting the nation's relationship with veg. Our national survey of 3,000 parents and their primary school-aged children reveals some important insights:

## KEY FINDING #1

**Analysis of claimed consumption highlights key demographic differences.**

17% of children disagree strongly that they eat 2 – 3 handfuls of veg a day. A further 19% disagree slightly.

Those disagreeing are significantly more likely to live in Northern England, Scotland or Northern Ireland and to come from families where household income (HHI) is £30,000 per annum or less.

They are also more likely to be male and older.

The inflection point appears to be age 8, when children start demonstrating higher degrees of autonomy as outside influences kick in.

## KEY FINDING #2

**Household income has little effect on parents' attitudes but does impact their claimed behaviours.**

Regardless of HHI, more than 90% of parents think it's important for children to eat lots of veg; and three in four think their child should eat more veg.

Where there is divergence, however, is in parents' own behaviours. In families where HHI is £30,000 or less, 28% disagree that they eat 2 – 3 handfuls of veg a day.

In higher income households, it's just 19%.

This gap has significant implications. When parents eat 2 – 3 handfuls of veg a day, their children are nearly twice as likely to like vegetables.

Based on this data, it is hard to overstate the importance of parental role modelling.

## KEY FINDING #3

**The cost-of-living crisis is depressing lower income families' propensity to buy veg.**

11% of all households claim to have bought fewer veg recently. Where HHI is less than £30,000, the figure rises to 14% - and jumps to 17% in families earning under £20,000 per annum.

Wealthier households state they've cut back on veg purchasing to minimise the risk of waste. For less affluent families, the barrier is more fundamental. 37% of this group say they simply haven't been able to afford veg, 15 points more than those with HHI of over £30,000 a year.

## KEY FINDING #4

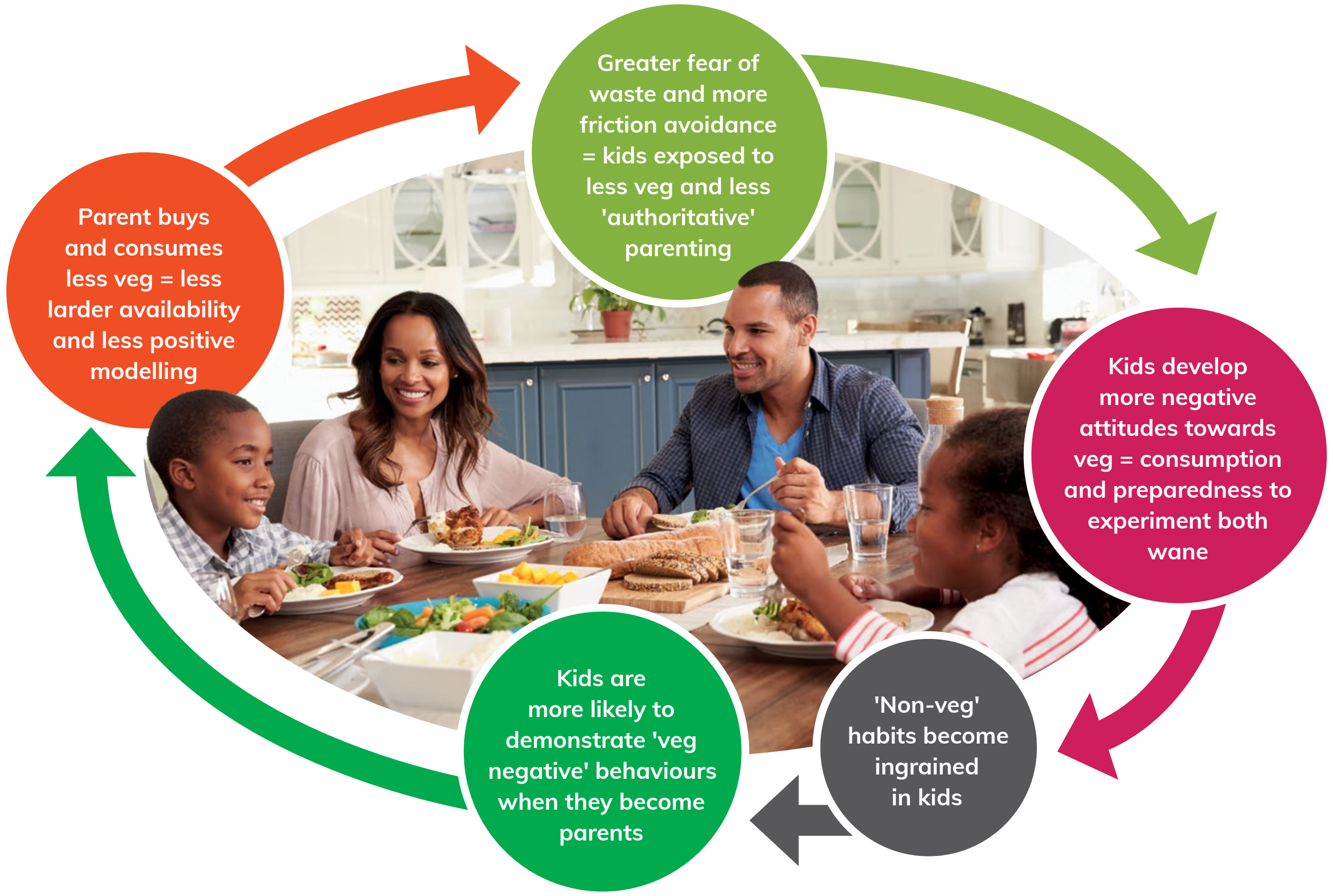
**'Authoritative' parenting appears to make a real difference to children's attitudes and behaviours.**

Psychologists describe authoritative parents as those who "convey clear standards without resorting to intrusive or restrictive approaches." As such, they differ from authoritarian parents who are much less warm or responsive.

Our research indicates a clear correlation between more authoritative parenting and a child's consumption of and attitudes towards veg. This is true regardless of household income.

For example: 40% of all kids strongly agree that "it's important I eat lots of veg". But in households where kids are given the choice whether to eat the veg on their plate or not, that figure falls to 29%.

This is a topic that we intend to explore more thoroughly in future surveys.




Our programmes "*Eat Them To Defeat Them*" and "*Simply Veg*" are specifically designed to meet these challenges. Working in tandem, they reduce the risks of waste and meal-time friction by putting parents and children on the same side. Whether it's the fun buzz of our TV ads, accessible 'how to' content or engaging tools, their purpose is to encourage consumption and engrain veg-positive habits.

We know these programmes are working. But we also know the headwinds are particularly strong at the moment. The latest retail sales data, kindly provided by Circana, emphasises the size of the task facing us.

Broadly across food the unit volume has returned to pre-pandemic 2019 levels with a double-digit year on year increase in cost over the last 12 months.

A closer look at vegetables shows that volumes have tracked a little lower than total food but spend is notably lower. Vegetables are cheaper. There are some signs of some price recovery in H1 2023 but all in all we're spending less of our weekly shopping budget on veg.

KEY FINDING #1

# Demographic differences

Analysis of claimed consumption highlights key demographic differences

## We looked first at what PARENTS claimed their children ate.

Overall, **39%** of parents **disagree** that their child ate 2-3 handfuls of veg a day with **16% disagreeing strongly**.

Those who disagreed strongly (i.e. their children do not eat 2-3 handfuls per day) were significantly more likely:

- To live in Northern England, Scotland or Northern Ireland.
- To have HHI of under £30,000 per annum.
- To have male children.
- To have older children. The inflection point appears to be age 8, when children start demonstrating higher degrees of autonomy as outside influences kick in.

**Parents under £30k HHI were twice as likely than parents with HHI over £80k to state that their child eats less than 2-3 portions per day.**

| | "My child eats 2-3 handfuls of veg per day" | | | |
|---|---|---|---|---|
| | Disagree Strongly | Index vs All | Total Disagree | Index vs All |
| All Parents | 16% | 100 | 39% | 100 |
| Northern England | 19% | 119 | 43% | 110 |
| Midlands & East of England | 15% | 94 | 37% | 95 |
| South West England | 12% | 75 | 37% | 95 |
| London & South East England | 14% | 88 | 36% | 92 |
| Scotland | 18% | 112 | 41% | 105 |
| Northern Ireland * | 21% | 131 | 51% | 131 |
| Wales | 14% | 88 | 39% | 100 |
| HHI < £30K | 18% | 112 | 42% | 108 |
| HHI > £30K | 14% | 88 | 36% | 92 |
| HHI > £80K | 7% | 44 | 20% | 51 |
| Male Child | 18% | 112 | 42% | 108 |
| Female Child | 14% | 88 | 37% | 95 |
| Child aged 5 -7 | 15% | 94 | 37% | 95 |
| Child aged 8 | 17% | 106 | 44% | 113 |
| Child aged 9 – 11 | 17% | 106 | 40% | 103 |

*NB Small base.

## We then asked their CHILDREN how much veg they ate.

With questions like these, there's always the inherent risk of over-claiming: both parents and kids want to 'be seen to be doing the right thing'. Accordingly, the relative scores matter more than the absolute ones.

That said, it's worth noting that we found a very close match in how the two groups responded. This suggests a high degree of veracity.

17% of children agreed strongly that they ate 2 – 3 handfuls of veg per day, with the exact same percentage disagreeing strongly. Overall, 36% disagreed with the statement. Our findings therefore broadly reflect the National Diet and Nutrition survey from 2016-2019, which reported that 29% of primary school-aged children eat less than one portion of veg per day.

Those who disagreed strongly (i.e. their children do not eat 2-3 handfuls per day) were again significantly more likely:

- To live in Northern England, Scotland or Northern Ireland. (In contrast to what their parents said, there were also high levels of disagreement in Wales.)
- To live in families with a HHI of under £30,000.
- To be boys.
- To be 8 or older. Again, this age seems to mark a watershed in claimed behaviour.

| | "I eat 2-3 handfuls of veg per day" | | | |
|---|---|---|---|---|
| | Disagree Strongly | Index vs All | Total Disagree | Index vs All |
| All Children | 17% | 100 | 36% | 100 |
| Northern England | 20% | 118 | 40% | 111 |
| Midlands & East Of England | 15% | 88 | 36% | 100 |
| South West England | 15% | 88 | 36% | 100 |
| London and South East England | 15% | 88 | 32% | 89 |
| Scotland | 20% | 118 | 40% | 111 |
| Northern Ireland * | 24% | 141 | 49% | 136 |
| Wales | 22% | 129 | 38% | 106 |
| HHI < £30K | 20% | 118 | 40% | 111 |
| HHI > £30K | 15% | 88 | 34% | 94 |
| HHI > £80K | 11% | 65 | 20% | 56 |
| Male Child | 18% | 106 | 38% | 106 |
| Female Child | 16% | 94 | 34% | 94 |
| Child aged 5 -7 | 16% | 94 | 34% | 94 |
| Child aged 8 | 19% | 112 | 40% | 111 |
| Child aged 9 – 11 | 17% | 100 | 37% | 103 |

Combined, these findings confirm Veg Power's key target: lower income households with children in the second or third year of primary school. Northern England, Scotland and Northern Ireland are priorities (reflecting the general affluence of those areas). Activities should be gender inclusive, but any skew should be towards boys.

KEY FINDING #2

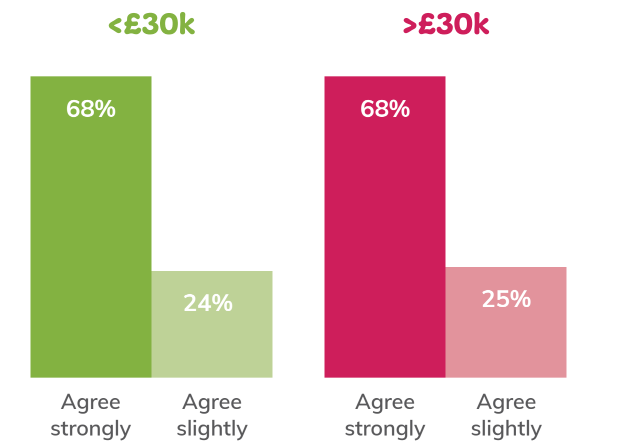
# Household income

## Household income has little effect on parents' attitudes, but does impact their behaviours

We've always argued that broad messaging around "veg are good for you" is essentially pointless. As noted in our 'Healthfulness' report last February, 90% of people already know they should eat 5-a-day as part of a healthy diet.

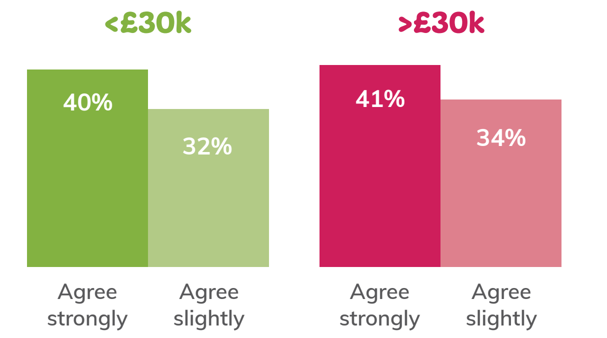
Our latest research underlines this. Regardless of income, there's almost universal agreement amongst parents as to veg's importance:

**It's important for a child to eat lots of veg**



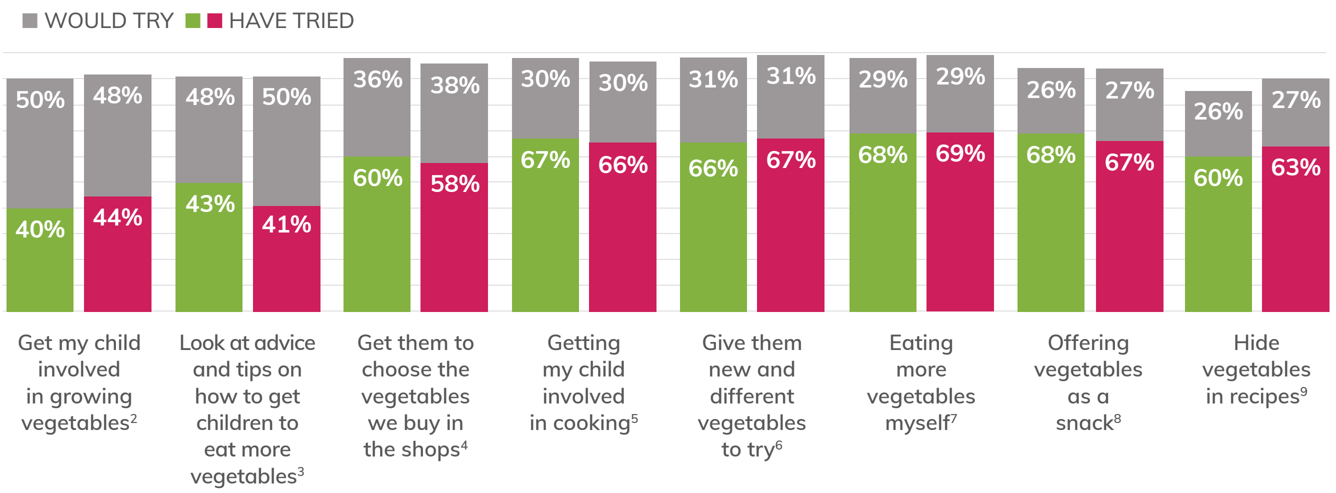

This agreement isn't just hypothetical: the vast majority of parents would like their child to eat more veg.

**I think my child needs to eat more veg**




So both sets of parents share a common goal. Moreover, they've both tried – or would be prepared to try – the same tactics to encourage their children. Income appears to offer little barrier to attempting interventions:

**Ideas tried to get children to eat more veg – <30K vs >30K income**




But we do see a meaningful divergence between the two groups when it comes to how much veg parents claim to eat themselves:

| | Parent: I eat 2-3 handfuls of veg per day | |
|---|---|---|
| | <30K HHI | >30K HHI |
| Strongly agree | 23% | 31% |
| Agree slightly | 34% | 39% |
| Neither agree nor disagree | 14% | 10% |
| Disagree slightly | 19% | 14% |
| Disagree strongly | 9% | 5% |

It's worth comparing these figures with their children's claimed consumption:

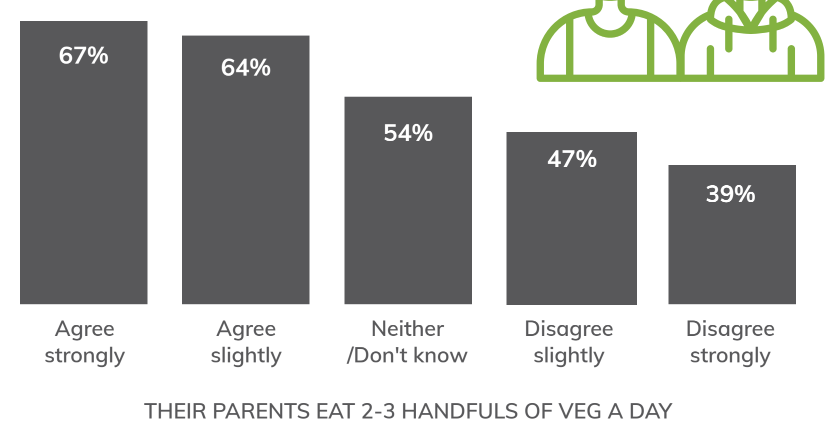
| | Child: I eat 2-3 handfuls of veg per day | |
|---|---|---|
| | <30K HHI | >30K HHI |
| Strongly agree | 16% | 19% |
| Agree slightly | 26% | 31% |
| Neither agree nor disagree | 16% | 15% |
| Disagree slightly | 20% | 19% |
| Disagree strongly | 20% | 15% |

In other words:

- **28% of parents** from lower income groups disagree that they eat 2 – 3 handfuls of veg a day, 9 points higher than their more affluent peers.
- **40% of children** from lower income groups disagree that they eat 2 – 3 handfuls of veg a day, 6 points more than children from higher income families. Most of this difference comes from children who disagree strongly.

The way these numbers reflect each other is important. Cross-analysis of the data reveals a significant insight: **when parents eat 2 – 3 handfuls of veg a day, their children can be nearly twice as likely to say they like vegetables:**

**Percentage of children who claim to like vegetables split by their parents claim to eat 2-3 handfuls per day**




Children generally learn by example. They watch much more than they listen, and – especially in their formative years – are naturally inclined to mimic their parents' behaviours.

This is a topic we've been exploring with our team of expert advisors in nutrition and child psychology. The outcomes have provided strong clues as to how we can further improve the effectiveness of our Simply Veg programme by supporting parents and carers to be better role models. We've already started work on incorporating the learnings and will be rolling them out in the autumn.

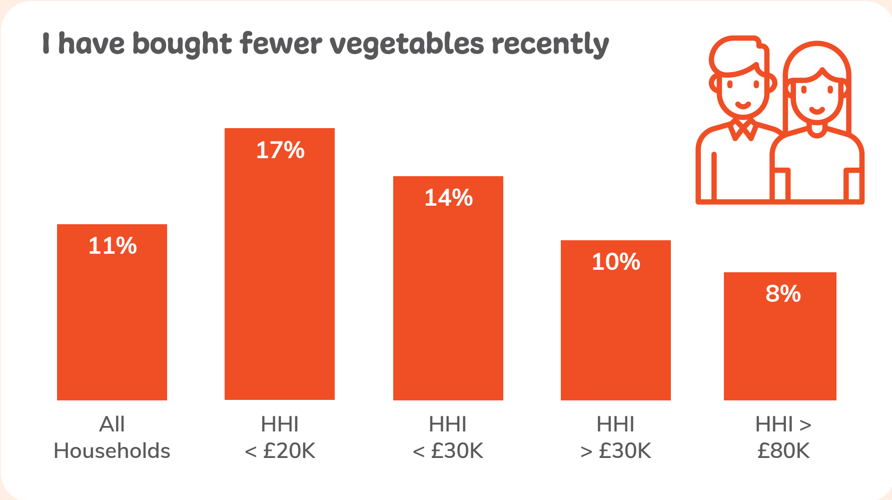
KEY FINDING #3

# Cost of living

**The cost-of-living crisis is depressing lower income parents' propensity to buy veg**

11% of all households claim to have bought fewer veg recently. Where household income (HHI) is less than £30,000, the figure rises to 14% - and jumps to 17% in families earning under £20,000 per annum.

By comparison, just 8% of the most affluent households say they've reduced their purchases of veg.






This confirms the analysis of Christmas spending in our 4th Market Insight Report in January 2023 and the subsequent widespread reporting on the impact of the cost-of-living crisis.

Nor do we have to look very far for the reasons families are buying less veg:

| | <30K HHI | >30K HHI | Gap |
|---|---|---|---|
| Veg are more expensive than they used to be | 42% | 38% | +4 |
| I haven't been able to afford them | 37% | 22% | +15 |
| I am worried veg will go to waste | 35% | 46% | -11 |
| There has been less availability in the shops | 28% | 26% | +2 |
| I am having to choose between veg and other food items | 28% | 27% | +1 |

Everyone has a keen eye on costs at the moment, and the rise in vegetable prices clearly hasn't gone unnoticed.

More significant is what these price increases mean to people. For wealthier households, it's a matter of prudence: they're eager to minimise the risk of waste wherever they can. For less affluent families, the challenges are more fundamental. 37% of this group say they simply haven't been able to afford veg, 15 points higher than those with HHI of over £30,000 a year.

Many parents, of course, will make sacrifices for their children. It's entirely possible that people are still buying veg for their kids – but feel they can't afford to buy it for themselves.

That may be commendable...but it still raises a problem. As we outlined in our second finding, parents eating less veg means their children are exposed to less positive modelling and veg consumption becomes less normalised.

KEY FINDING #4

# Parenting style

## 'Authoritative' parenting appears to make a real difference to children's attitudes and behaviours

These findings needs to be handled with care. To start, let's be clear how psychologists define 'authoritative' parenting. It's vastly different to 'authoritarian' parenting:

Authoritative parents are demanding and responsive and are characterised by high levels of control and warmth; they monitor the child's behaviour and convey clear standards without resorting to intrusive or restrictive approaches. Authoritarian parents are demanding and directive with low levels of responsiveness; they exhibit high levels of control [similar to authoritative parents], but in contrast show lower levels of warmth.[1]

The key phrase here is how authoritative parents "*convey clear standards without resorting to intrusive or restrictive approaches*". It's about being responsive rather than directive. Which takes us to the second point.

Psychologists are emphatic that mirroring is one of the most decisive factors in how children develop: the way parents act is the primary means by which positive standards are conveyed. Thus, when it comes to kids' eating habits, "*parents, guardians and caregivers should provide appropriate role modelling through their own behaviour; that is, influence children to 'do as I do' rather than 'do as I say.*"[2]

The evidence suggests that the combination of 'authoritative' parenting and appropriate role modelling has a strongly positive impact on children's attitudes to food and their long-term dietary health:

***"Children exposed to authoritative parenting show the highest levels of self-efficacy, self-discipline, emotional maturity and improved eating behaviours. Indeed, studies have showed how an authoritative parenting style is associated with a lower risk of obesity."*** [1]

***"These findings suggest the important role of parental modelling of healthy behaviours to young children among low-income families. Parents may serve as an important mechanism of change for children's health status by increasing their own healthy lifestyle behaviour."*** [3]

Having briefly examined the science, let's get back to our research study.

We were interested to explore parents' claimed behaviour when they serve veg to their child. Do they actively encourage consumption or do they 'step away'?

Our research suggests lower income parents tend to be a little more permissive:

| | When I serve veg to my child... | |
|---|---|---|
| | < £30K HHI | > £30K HHI |
| ...I make sure they eat them [AUTHORITATIVE] | 28% | 36% |
| ...Sometimes I make sure they eat them and sometimes I let them leave them [NEGOTIATORS] | 45% | 43% |
| ...I usually let them choose if they want to eat them or not [LAISSEZ-FAIRE] | 23% | 18% |

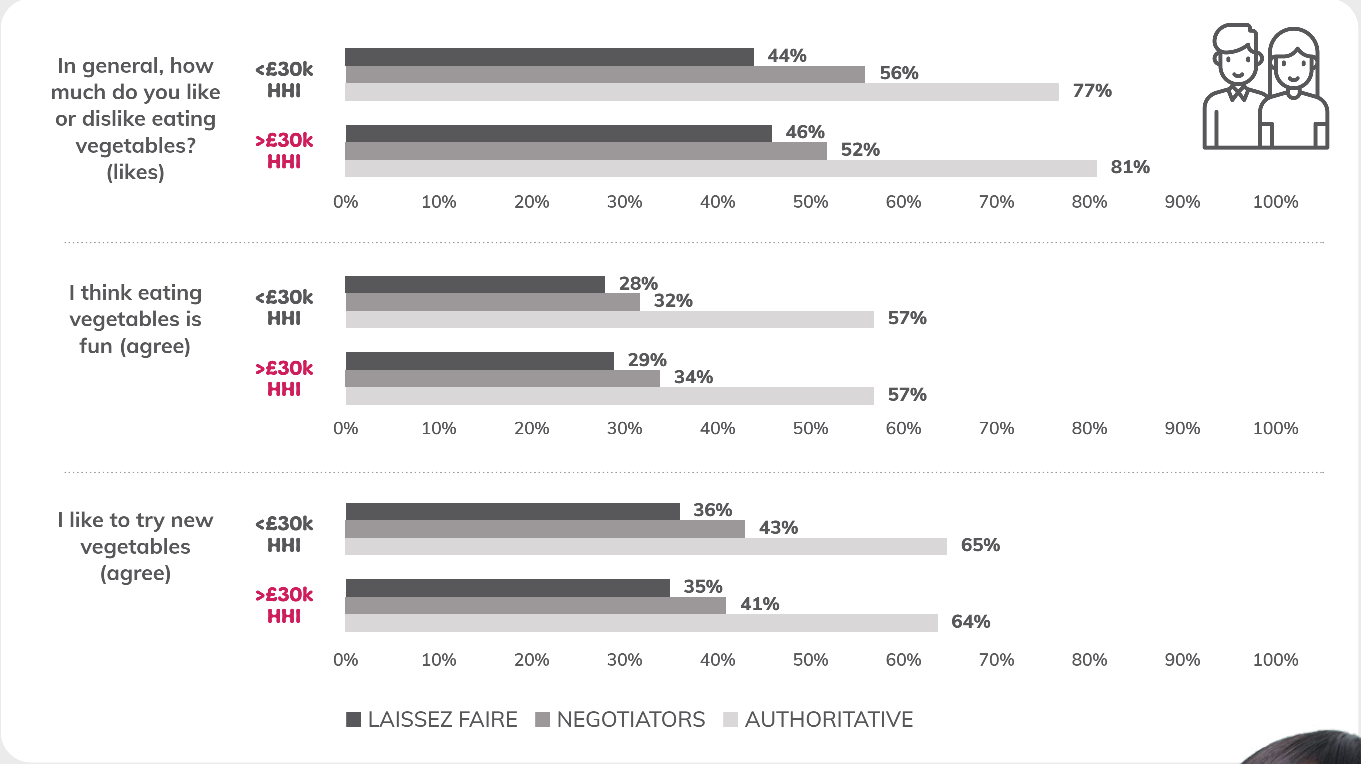
There is obviously a great deal of nuance here. It seems unlikely that "*making sure they eat them*" equates to forcing children to clear their plates before they leave the table. More probably, it's a measure of parental commitment: preparing and serving veg in appetising ways; creating the right table environment; re-offering and providing encouragement; proposing (non-food) rewards; and so on.

But we can't know for sure, which is why this topic needs greater scrutiny in future research.

There's also no immediately obvious reason why lower income parents should be more permissive. As we've already seen, they're just as adamant about the importance of children eating veg as their more affluent peers. A possible answer is that they're facing greater everyday pressures, leading to more sources of potential friction. Persuading the kids to finish their veg may simply be one struggle too many.

Veg Power looks carefully at three key measures of children attitudes – claiming to like vegetables, perceptions of fun and willingness to try new vegetables. In any survey of children questions such as these have limited value in absolute, due to inherent reporting bias, but they do offer very good value in relative comparison of different groups.

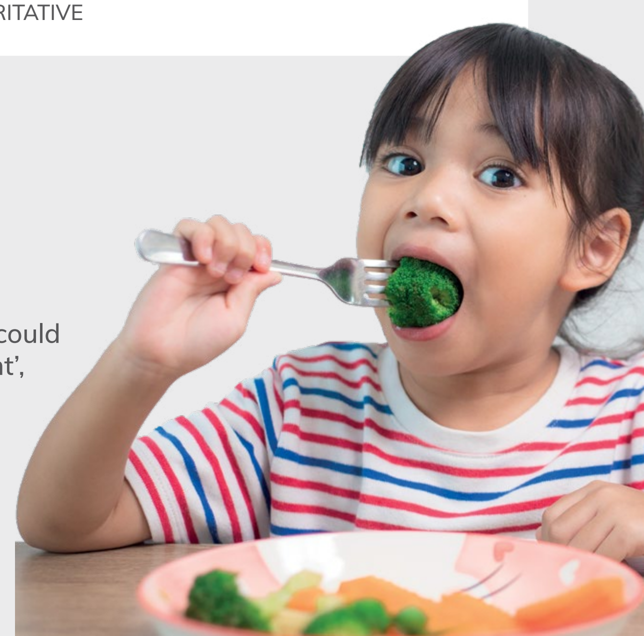
In the chart below we compare these answers split by both household income and parenting style. Two points stand out. Firstly, the significant and consistent difference on every measure in both income groups between different parenting styles. Secondly that the data is almost identical on both income groups suggesting that it is more parenting style rather directly household income that drives those core foundation attitudes.




We need to add a final caveat here, of course: correlation is not the same as causation.

It could be that less 'authoritative' parenting breeds more negative perceptions of veg and lower levels of claimed consumption. But it could also be true that, confronted by kids who are naturally 'veg resistant', parents choose to take a more permissive stance.

As with all complex topics, it's probably a bit of both.

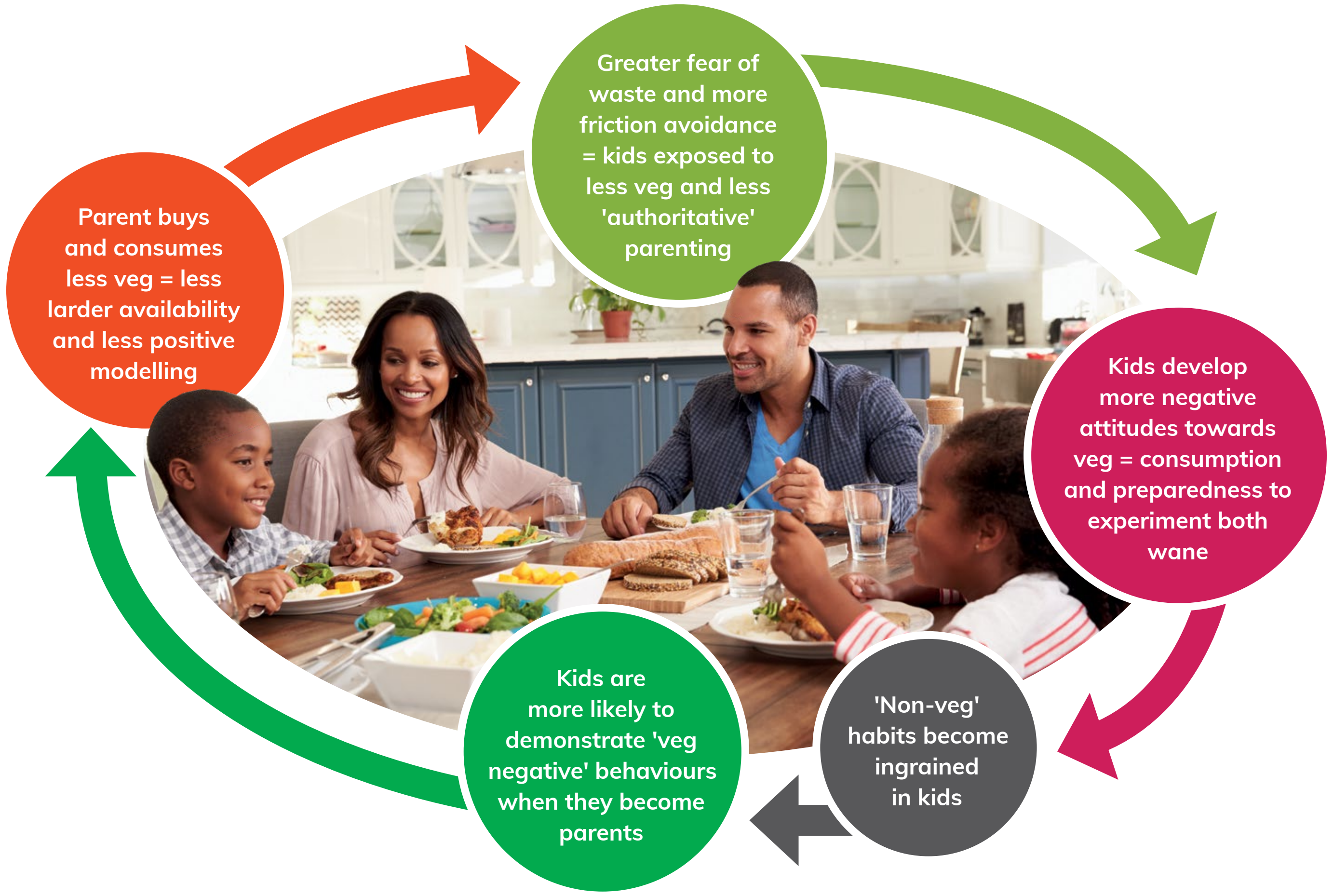


[1] Scaglioni S, De Cosmi V, Ciappolino V, Parazzini F, Brambilla P, Agostoni C. (2018) Factors Influencing Children's Eating Behaviours. Nutrients. 10(6):706. https://doi.org/10.3390/nu100607062.
[2] Scaglioni S, Salvioni M, & Galimberti C. (2008). Influence of parental attitudes in the development of children's eating behaviour. British Journal of Nutrition, 99(S1), S22-S25. doi:10.1017/S0007114508892471
[3] Coto J, Pulgaron ER, Graziano PA, et al. (2019) Parents as Role Models: Associations Between Parent and Young Children's Weight, Dietary Intake, and Physical Activity in a Minority Sample. Journal of Maternal Child Health 23(7):943-950. doi:10.1007/s10995-018-02722-z

# Implications of our research findings

We clearly have more work to do, particularly in terms of exploring the different ways in which 'authoritative' and 'permissive' parenting affect children's relationship with veg.

What we've learned to date, however, points to a worrying conclusion. Under the pressure of the cost-of-living crisis, the trends we've identified could easily turn into a vicious circle – with the impact being most pronounced amongst lower income families.




This type of vicious circle is almost exactly what happened after the financial crash of 2008...and it took 10 years for vegetable consumption rates to recover.[4&5]

Veg Power, and the sector as a whole, needs to do everything it can to stop history from repeating itself.

[4] Food expenditure and nutritional quality over the Great Recession, Institute of Fiscal Studies
[5] Office of National Statistic / DEFRA





# Analysis

**Dan Parker**
Chief Executive, Veg Power

Research can often surprise you. But it can be every bit as valuable when it shines a fresh light on things you instinctively know to be true.

The findings from our survey underline the importance of getting parents to eat veg, ideally at the same time as their kids. Positive role modelling and normalising veg consumption are absolutely critical if children are to develop a healthy diet.

There's always a section of society that's eager to throw its hands up in horror and blame poor parenting. To such people, the solutions are straightforward: another lecture on nutrition; a low-cost recipe book; maybe a few cooking lessons.

These approaches are guilty of massive over-simplification. As our study shows, virtually all parents want their children to eat more veg – and they're trying hard to achieve that outcome.

The problem is not attitudinal; nor is it down to an absence of effort. The real challenge for parents is risk: "If I serve vegetables, will they go to waste? Will it cause extra friction at the dinner table?".

Families – especially those on lower incomes – are facing extreme pressures from the cost-of-living crisis. With mortgages and rental payments going through the roof, that's only going to get worse.

In the current climate, waste is something that simply must be avoided. And however good their intentions, few of these parents have the time to try new recipes or the head-space to deal with the possibility of meal-time friction. It's hard enough to get through the day as it is.

Reducing risk is the core insight behind our *Eat Them To Defeat Them* campaign with ITV. Its goal is to create a positive environment that makes it easier for parents to succeed. Every element is geared to that end: the fun buzz of our TV ads; celebrity support; activities within schools to encourage first tasting; reward charts to help make consumption habitual.

By putting parents and kids on the same side, *Eat Them To Defeat Them* is achieving exceptional results. Our latest research shows that 77% of parents whose children participated in our 2023 schools' programme claim their kids ate more vegetables. Even amongst parents of children who claim to dislike veg, 66% said they'd seen increased consumption.

Importantly, these benefits stand the test of time. 53% of parents whose kids have taken part in the schools' programme three times or more (including this year), claim to have seen positive long-term effects: notably higher veg consumption; greater willingness to try new veg types; and increased propensity to see veg as fun.

It's hardly surprising, then, that 89% of parents want the programme to be repeated next year. They recognise that here is something that provides real help with the challenges they face every day.

With Simply Veg, we are taking our support for parents up to the next level.

Simply Veg is all about effective content, delivered through printed, digital and social channels. Targeting parents and carers of primary school-aged children, it brings together the knowledge we've accumulated over six years with how-to insights from leading UK experts in nutrition, psychology, food education, cooking, communications and entertainment.

Our mission is to combine the best science with the most exciting creativity, and then mix in parents' own hints and tips in order to make the solutions accessible within the realities of daily life.

We'll be piloting Simply Veg with 3,000 families in Lambeth in Q4. If you'd like to stay abreast of progress, please check our website or social feeds for updates.

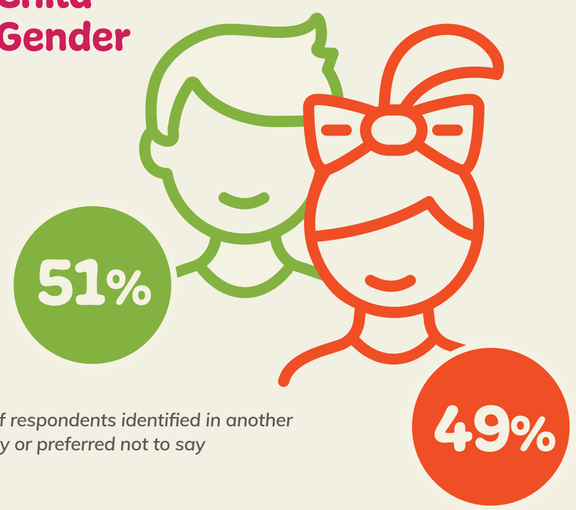
In our mission to get children to eat more veg, we're currently facing some particularly strong headwinds. These are difficult times, but we're confident that the combination of *Eat Them To Defeat Them* and Simply Veg will further accelerate the impact we're creating.

Based on the latest retail sales data, kindly provided by Circana, that won't be a moment too soon.

# The research study

The findings in this report are based on a large scale quant study in March / April. A national online survey of 3,000 demographically and geographically representative parents & their child of primary school age conducted on behalf of Veg Power in March/April 2023 following the 2023 *Eat Them to Defeat Them* Campaign.

## Child Gender

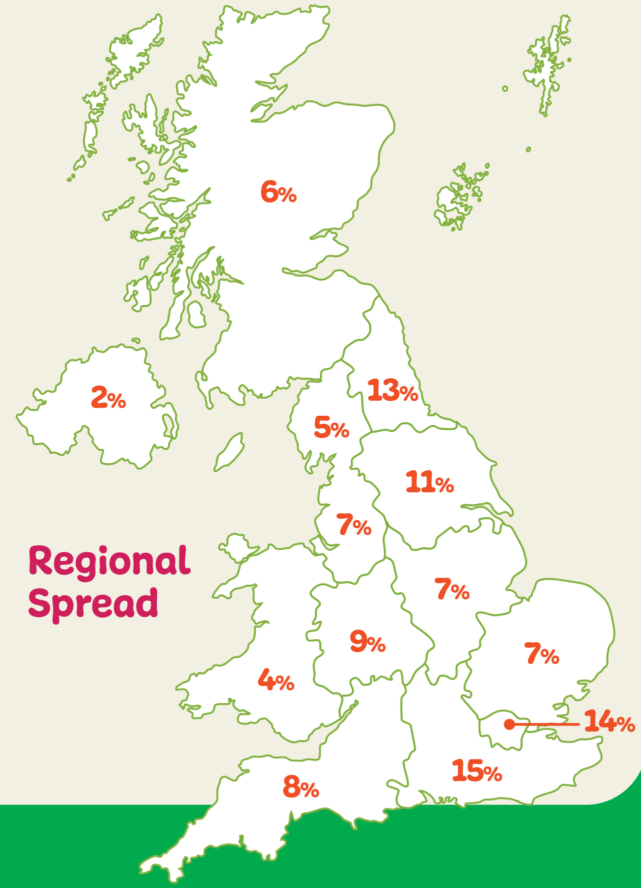



*6 of respondents identified in another way or preferred not to say*

## Child Age

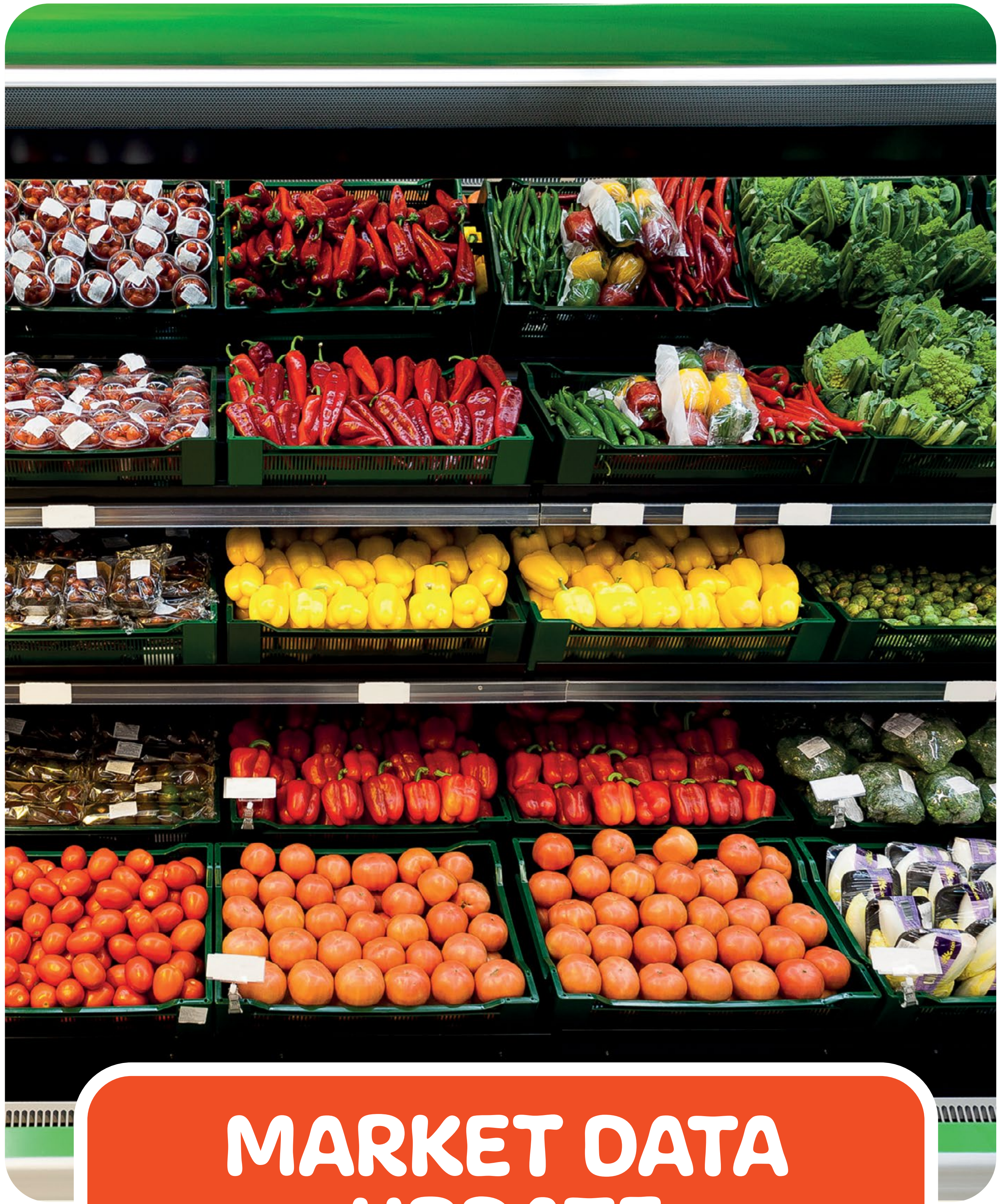

## Household Income


## Regional Spread







# MARKET DATA UPDATE

June 2023

# Retail sales insight

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

Circana.

## Food

Settled back to pre-pandemic volumes

**TOTAL FOOD**

| | Volume | Value |
|---|---|---|
| H1-2023 vs H1-2018 | -6.6% | 17.5% |
| H1-2023 vs H1-2019 | -6.1% | 17.4% |
| H1-2023 v H1-2020 | -10.3% | 8.8% |
| H1-2023 vs H1-2021 | -10.3% | 8.4% |
| H1-2023 vs H1-2022 | -6.9% | 6.8% |

Thanks to ongoing generous support of Circana (formerly IRI Worldwide) we can examine the actual retail sales data in the UK going back to 2018.

Please note this dataset does not include sales from Lidl and Aldi which currently account for 17.9% of grocery sales. Since early 2019 5.1% of the grocery market by value has moved to these discounters (and is therefore no longer in this dataset) including a 3.9% swing since the start of last year as the cost of living crisis has changed shopping patterns. (Source: Kantar)

Factoring in these market swings we can see that after the volume growth caused by lockdowns the total number of items purchased has returned to a little below pre-pandemic levels with a double digit increase in spend over the last year.

Nothing we don't already know from the press - but how has the vegetable category been affected?



## Vegetables

Volumes return at lower value

The first thing to note is both the year on year comparison of 2023 to 2022 and 2023 vs pre-pandemic 2019 or 2018 show that unit volumes have tracked closely to total food but with some greater reduction in vegetable volume.

The significant difference for vegetables is the spend. Looking both over the 2019-2023 pandemic period and comparing this year with last year we can see that increased retail sales value for vegetables has lagged well behind total food.

Whereas total food value is up 17.4% since 2019 on this data set, the retail spend on vegetables over 4 years has only increased by 4.6% - we are spending relatively less on veg.

**TOTAL VEGETABLES**

| | Volume | Value |
|---|---|---|
| H1-2023 vs H1-2018 | -7.9% | 5.3% |
| H1-2023 vs H1-2019 | -6.4% | 4.6% |
| H1-2023 v H1-2020 | -14.4% | -5.2% |
| H1-2023 vs H1-2021 | -14.9% | -2.5% |
| H1-2023 vs H1-2022 | -7.3% | 3.5% |

**VEGETABLE SHARE OF BASKET**

| | Volume | Value |
|---|---|---|
| H1-2018 | 10.3% | 6.9% |
| H1-2019 | 10.2% | 6.9% |
| H1-2020 | 10.6% | 7.1% |
| H1-2021 | 10.7% | 6.8% |
| H1-2022 | 10.2% | 6.3% |
| H1-2023 | 10.1% | 6.1% |

This same conclusion comes through in basket share data. Broadly we have returned to pre-pandemic levels on volume basket share.

However, the percentage of spend has dropped from 6.9% pre-pandemic, and a peak over 7.3% in Q2 2020, to only 6.1% in H1 2023. At least that is up from the low of 5.6% in Q4 2022 which is a reflection of increased retail prices for vegetables in H1 2023.

VEGETABLES HAVE FALLEN TO ONLY **6.1%** **of basket value share**

# Category analysis

This data looks at the unit volume and sales value data for individual vegetables using the data kindly donated by Circana.

This dataset covers grocery multiples but not discounters Lidl and Aldi. Please note there has been a 3.6% swing in all groceries towards the discounters over the 18 months from start H1 2022 to end of H1 2023 which will contribute to volume and spend within this dataset. We might reasonably consider that for any product with a sub 3.9% volume drop sales have simply moved to the discounters rather than declined.

Most of the vegetable category has been in a period of managed contraction. Volumes are down from last year particularly for all canned, fresh leeks and mixed prepared.

There are few good news stories where both volume is increasing and value increasing at a greater rate with higher unit prices. These are more so when the swing to discounters is considered. It's not been bad time to grow sweetcorn.

## 2023 vs 2022

### Managed Contraction

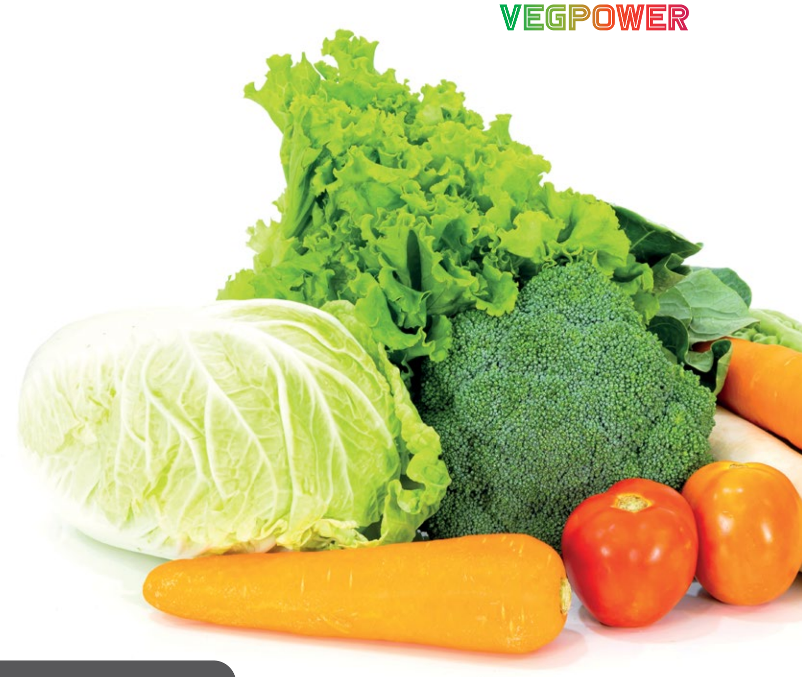
Volume has dropped with a lower decrease in market value as unit prices have increased.

| Product | Unit Volumes | Market Value |
|---|---|---|
| Fresh Asparagus | -8.9% | -6.6% |
| Fresh Broccoli | -5.8% | 16.3% |
| Fresh Cabbages | -2.1% | 18.4% |
| Fresh Carrots | -5.6% | 5.6% |
| Fresh Cauliflower | -9.8% | 4.9% |
| Fresh Celery | -6.7% | 8.1% |
| Fresh Courgette | -7.1% | 6.8% |
| Fresh Cucumber | -6.8% | 32.2% |
| Fresh Leeks | -11.3% | 10.4% |
| Fresh Legumes | -5.9% | -5.5% |
| Fresh Lettuce | -3.8% | 11.7% |
| Fresh Mixed Prep. | -11.4% | -4.1% |
| Fresh Mushrooms | -8.9% | 0.0% |
| Fresh Other Root | -6.1% | -0.7% |
| Fresh Parsnips | -9.4% | 16.0% |
| Fresh Peppers | -7.0% | 7.0% |
| Fresh Prep Salad | -9.4% | -4.5% |
| Fresh Radish | -5.3% | 5.1% |
| Fresh Tomatoes | -9.3% | -4.1% |
| Fresh Sweet Pots. | -3.6% | 2.0% |
| Frozen Mixed Veg | -3.6% | 15.2% |
| Frozen Peas | -9.9% | 5.7% |
| Canned Carrots | -10.6% | 5.1% |
| Canned Mixed | -4.5% | -0.2% |
| Canned Peas | -13.8% | 0.6% |
| Canned Sweetcorn | -14.2% | 6.1% |

### Positive Growth

Volume has increased with value increasing by a higher rate showing increasing unit prices with growth.

| Product | Unit Volumes | Market Value |
|---|---|---|
| Fresh Avocado | 0.8% | 2.6% |
| Fresh Sweetcorn | 3.5% | 8.2% |
| Frozen Beans | 3.0% | 19.0% |
| Frozen Sweetcorn | 0.2% | 19.1% |



Looking at the long-term comparison with pre-pandemic 2019 and allowing for a 5.1% swing to discounters during this time the picture is more mixed. Carrots, leeks and parsnips face a long-term decline in volume as well as a sharper decline in sales value as prices have been pushed lower.

However for most of the market the volumes are down, sales value is down but unit prices a little improved.

## 2023 vs 2019

### Managed Contraction

Volume has dropped with a lower decrease in market value as unit prices have increased.

| Product | Unit Volumes | Market Value |
|---|---|---|
| Fresh Courgette | -0.7% | 9.8% |
| Fresh Peppers | -2.1% | 13.5% |
| Fresh Broccoli | -3.1% | 27.8% |
| Frozen Mixed Veg | -4.8% | 18.4% |
| Fresh Prep Salad | -7.2% | -0.6% |
| Fresh Cauliflower | -8.5% | -5.4% |
| Fresh Tomatoes | -9.2% | 7.1% |
| Fresh Mushrooms | -11.5% | 2.6% |
| Fresh Other Root | -11.9% | 6.2% |
| Fresh Celery | -12.5% | -9.4% |
| Fresh Sweet Pots. | -13.0% | -9.3% |
| Fresh Legumes | -14.1% | -8.0% |
| Frozen Peas | -15.3% | -6.9% |
| Fresh Asparagus | -19.5% | -11.7% |
| Fresh Mixed Prep. | -19.8% | -3.8% |
| Canned Mixed | -27.5% | -0.1% |
| Canned Peas | -32.1% | -6.5% |
| Canned Carrots | -37.0% | -14.3% |

### Positive Growth

Volume has increased with value increasing by a higher rate showing increasing unit prices with growth.

| Product | Unit Volumes | Market Value |
|---|---|---|
| Frozen Sweetcorn | 97.3% | 105.6% |
| Fresh Sweetcorn | 19.3% | 22.3% |
| Fresh Lettuce | 7.2% | 23.9% |
| Frozen Beans | 5.8% | 32.4% |
| Fresh Cucumber | 1.1% | 31.8% |
| Canned Sweetcorn | 0.4% | 7.9% |

### Discounted Growth

Volume has increased with lower increase in sale value – the market is growing with lower prices.

| Product | Unit Volumes | Market Value |
|---|---|---|
| Fresh Avocado | 16.0% | 2.0% |
| Fresh Radish | 6.6% | 2.7% |
| Fresh Cabbages | 6.0% | 0.5% |

### Market Decline

Volume has dropped with even lower drop in value.

| Product | Unit Volumes | Market Value |
|---|---|---|
| Fresh Carrots | -4.3% | -15.8% |
| Fresh Leeks | -5.7% | -12.9% |
| Fresh Parsnips | -6.5% | -7.8% |

# Scratch cooking

We also like to keep an eye on our scratch cooking basket. It includes items such as raw meat, garlic, herbs and spices - ingredients you'd only buy to cook from scratch.

Obviously that grew as a share of basket during the pandemic as locked-down families cooked more at home. Although it has dipped down as life returned to normal a little of that growth has been retained suggesting a some lasting increase in home cooking.

**SCRATCH COOKING INGREDIENTS SHARE OF OVERALL BASKET**

| | Volume | Value |
|---|---|---|
| 2018 | 8.9% | 15.1% |
| 2019 | 8.9% | 14.8% |
| 2020 | 9.7% | 15.4% |
| 2021 | 9.7% | 15.6% |
| 2022 | 9.2% | 14.8% |
| 2023 | 9.3% | 14.8% |



# VEGPOWER IN NUMBERS

**£17.5m ADVERTISING** donated to **our campaigns**

**36m+ PEOPLE REACHED** every year since **2019**

**4,884 SCHOOLS** took part in **OUR SCHOOLS' PROGRAMMES**

**1.5m CHILDREN** have taken part in **TASTING, COOKING, GROWING** and **VEGETABLE FUN**

**25m SOCIAL MEDIA ACCOUNTS REACHED** with our **#SeasonalVeg** hashtag

**77% PARENTS** of children who took part said they **ATE MORE VEGETABLES**

**+£132m VEGETABLE SALES** as a **DIRECT RESULT** of our campaigns in 2019-2022

**1.4 BILLION PORTIONS** That's equivalent to nearly 1 billion **ADDITIONAL CHILDREN'S PORTIONS**

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