

Grocery market share information

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Source: TNS Worldpanel

Data: 12 week ending 7 Sep 2008 v 2007

Expenditure
£19.9 bn
+7.3%

Ave. Trip spend
£16.77
+4.8%

Frequency of shop visits
47.5
+1.2%

Percentage share of total grocers

	12 w/e 09 Sep 07	12 w/e 07 Sep 08
Total Multiples	92.8	93.2
Total Tesco	31.7	31.5
Total Asda	17.0	17.3
Total Sainsbury	16.0	15.8
Morrisons	10.8	11.0
Somerfield (exc KS)	4.0	3.8
Total Waitrose	3.9	3.8
Iceland	1.6	1.7
Aldi Lidl Netto	5.6	6.0

12 w/e 7 Sep 2008

Grocery market

Fact 1 - Market growth driven by inflation

Fact 2 - Price now top of agenda

Fact 3 - Aldi,Lidl,Iceland,Asda,Morrisons growing

Fact 4 - Waitrose under pressure