The Grocer

Focus On: Ambient & Canned goods by Andrew Lusher (me@andrewlusher.com)

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The Story

Prices have fallen to their lowest level since October 2012 but low prices haven't encouraged shoppers to buy more goods; 18 million fewer kilos have been shifted in the past year. Yet in the midst of this gloom, a handful of players are not just winning share but actually growing sales. How? What's driving the decline of the overall category and how can it be resurrected?

Key Themes

Packaging formats: This feature will pay close attention to how manufacturers' choice of packaging formats is evolving in ambient food, using data from market analysts on growth and decline in formats such as cans, pouches, cartons and so on. Is the can's dominance being challenged? In which categories are alternatives to the can gaining most traction?

Ranging: Another crucial angle for this feature will be an exploration of how retailers' canned and ambient ranges have changed over the past year, particularly in light of rationalisation schemes such as Tesco's Project Reset and Asda's Project Renewal. Who's suffered as a result of reduced shelf space or delistings? Who's benefitted?

Premium product development and innovation: Canned and ambient food may be struggling, but that hasn't stopped many of the biggest brands delivering a host of convincing launches over recent years. So what have been the most successful launches of the past year? What trends are they looking to tap? What's in the pipeline?

Own label v brands: Our analysis suggests brands are losing share to own label as prices are cut to narrow the price differential between the two. This feature will explore the dynamics between brands and own label in detail, looking at everything from range developments, price and promotions to advertising, merchandising and innovation.

Categories: This feature will look at all parts of the canned and ambient category from beans to veg, meat to fish. Particular areas of interest will be the canned fish sector, which has seen average prices fall in the past year and beans, which has managed to defy the overall category decline with growth of £5.3m. What's at play here?

Discounters: Bargain Stores, Aldi and Lidl are showing strong growth in canned and ambient as is Waitrose. What are the mults doing to fight back? And what's driving the discounters' growth?

Convenience: Canned goods are in decline as shoppers switch to chilled convenience products. What are the category's biggest players doing to tap into the convenience market?

Innovations: Key to this feature will be a discussion of the latest NPD in the market. Four of the most interesting recent launches will be profiled in a separate box and will potentially include ambient products to demonstrate how alternatives to cans are being used.

Key questions the feature is likely to address:

- What consumer trends have impacted the category over the past year?
- How have promotional strategies (both in terms of price and marketing) evolved?
- How have individual retailers’ strategies impacted the market?
- How has merchandising changed in the market?
- What impact has own-label had on branded players?
- What’s next for the category?