



IRELAND

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RETAIL TRENDS

As Ireland emerges out of a deep recession, the most noticeable trend has been the lack of recovery in the grocery industry, in terms of value and sales increases compared to other retail sectors. While Irish consumers once again have more money in their pockets, **the grocery sector remains caught in a discount trap**, with each of the main players, SuperValu, Tesco, Dunnes Stores, Aldi and Lidl, seeking to outdo each other on price.

CONSUMER TRENDS

There has been much discussion as to whether the Irish economic recovery is really happening, or whether it is “all Blarney”, but on the streets of Ireland, and particularly Dublin, **there is a new found confidence**, with busy restaurants and bars (even during the week), car sales up, holiday sales up, and renewed interest in the property market. There's a real feeling that after all the pain, we are finally “turning the corner”.

TREND 1: PRICE WAR

Arguably the most impactful promotional device utilized by any retailer in the past year was a vouchering campaign commenced by Dunnes Stores in late 2014, and continued right through 2015, offering €10 off if a consumer spends €50 or more. Both discounters, Aldi and Lidl, have also used a similar device intermittently over the course of the year. However, other retailers, such as the market leader, SuperValu have adopted a different tactic – its Food Academy program, which championed small suppliers, was a big hit, and saw the emergence of brands such as Patel's, The Happy Pear, and Pasta Magic.

PASTA MAGIC

Brand: Leaves

Launch date: 02/2015

Category: Grocery

Family: Starches, pasta, rice

General description: #PastaMagic is a unique range of flavored pastas made using exclusively buckwheat and chickpea. Using these ingredients means that a portion of #PastaMagic contains more protein than two sausages, constitutes one of your five a day and is free from wheat, dairy and eggs. Leaves' pasta cooks al dente in just five minutes.





Why is this product a success? The greatest innovation of this product is that it completely shifts consumer perceptions of pasta from a secondary ingredient that always needs to be paired with something else, to a complete, balanced, delicious meal solution.

TREND 2: DEMAND FOR HEALTHIER OPTIONS

One of the most important trends has involved product reformulation. With growing childhood obesity and increased concerns about public health - including discussions about a 'sugar tax' at the government level, there has been a concerted effort from food manufacturers to use more natural and healthier ingredients and promote healthier product ranges with their portfolio.

HIRO BY ROISIN

Brand: HIRO by Roisin

Launch date: 03/2015

Category: Fresh products

Family: Ready-made meals



General description: This revolutionary product is an exciting chilled, fresh, complete meal range that will change your thoughts on healthy eating. The product uses noodles developed from the konjac plant, from which flour for pasta and noodles can be made. This means that the product is entirely carbohydrate free and is one of the healthiest, lowest calorie meals available – as low as 100 calories!



Why is this product a success? HIRO by Roisin is a unique and innovative range of chilled, healthy ready meals that is completely different from anything else on the market.

TREND 3: SUPPORTING SMALL PRODUCERS

The "Buying Irish" trend has long been associated with the Irish grocery sector - consumers here, like to support their own. But the past year has seen renewed interest for support for smaller, up and coming producers. Market leader SuperValu unveiled "Food Academy", last year, to celebrate small producers, while Tesco also operates its similar 'Taste Bud' initiative.

COOL BEANS

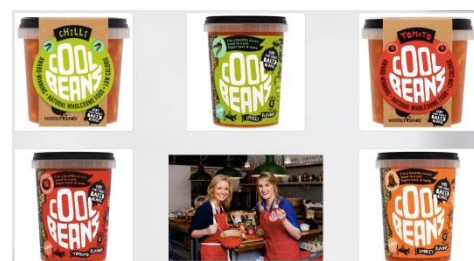
Brand: The cool Bean Company

Launch date : 11/2014

Category: Grocery

Family: Shelf stable ready meals (preserved, dried)

General description: Cool Beans is a healthy meal in a pot. Cool Beans is a range of meal options using the cannellini bean as its main ingredient, cooked with chopped tomatoes, diced onion and garlic. The product range comes in three delicious flavors: Original Tomato, the award-winning Smokey Paprika and Hot Chili.





Why is this product a success? The success of this unique product is down to the fact that it uses healthy ingredients and is available in a convenient pack format, coupled with eye-catching branding.

NEW RETAIL CONCEPT

Natural Meal Accompaniments: Consumers are increasingly looking for healthier alternatives to pasta, fries, rice, and other foods that they can have with their meals.

Healthy Snacking: Building on the free-from trend, consumers are looking for products that meet specific health/dietary requirements, but also taste great.

Meal/Snack Pots: Driven by growth in food-to-go, consumers are demanding more convenient meal options, which are also healthy

OTHER MAJOR RETAILERS

The past couple of years have seen an explosion in the use of the in-store environment as a key marketing tool - things like shelf-talkers and floor graphics aren't new, but many brands are ramping these up to incorporate whole aisle takeovers, encouraging consumers to think differently about particular categories, and promoting a cross-category sales approach.

DO NOT MISS

Centra O'Connell St, Limerick - The first example of a brand new convenience store concept that Musgrave Group, which operates the Centra chain, plans to roll out nationwide. **Topaz Ballacolla, Co. Laois** - Winner of the NACS 2015 International Convenience Retailer of the Year last year, an example of how a forecourt store should look; modern, fresh, quality food. **Spar Dame St, Dublin** - Arguably the best food-to-go c-store in the country.