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April 2007

The people problem



Michael Sansolo
Senior VP
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Institute

Phil

Lempert, the host of this newsletter, challenges audiences to think about how to get ahead of the coming issues. Only that way, he says, do we have a better chance of being positioned for success. It's an exercise worth doing.

Look 10 or 20 years down the road and ask yourself: What is the next big problem we have to address as an industry? The choices would be many:

We could discuss competition, eating trends or food safety.
[read more](#)

Empty nesters - living the dream - not exactly



Todd Hale
Senior VP
ACNielsen
Consumer Insights

Hard to believe, but I can still recall the summer of 1956 when my mom's parents moved in with our family of six. Both of my parents worked, and my grandmother was joining the household to help raise four boys—ages three, five, six, and seven. While there was financial benefit to my grandparents, I guess my grandfather had other ideas about the arrangement as he suffered a heart attack and passed away during the weekend move.

[read more](#)



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The five things you need to know

A valuable lesson has been learned!

When I first started this series on the TODAY Show, my producer and I weren't quite sure about the reaction we would have from viewers. As food editor and contributor to the show for almost 18 years with hundreds of segments under my belt, I was convinced that what we needed to do next was drill down into specific categories in the supermarket - and reiterate the most basic of tips. [read more](#)

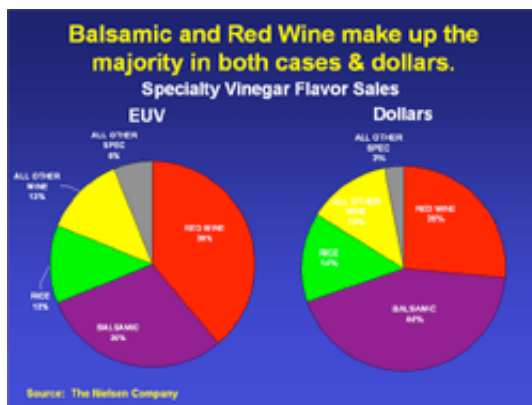
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Specialty vinegars lift prices, organics and naturals grow

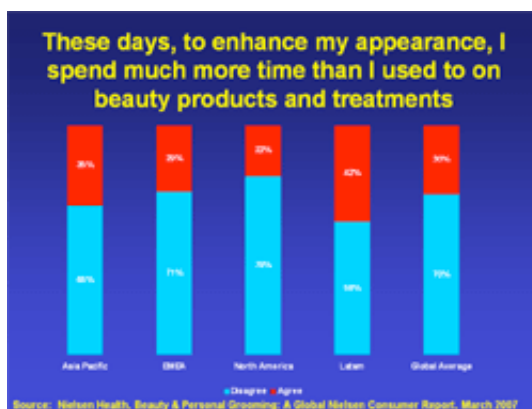
Ask homemakers about vinegar, and they'll say it's an indispensable cleanser. Ask diners, and they'll say it flavors many foods with fewer harmful fats or calories than other choices. Ask retailers, and they'll savor vinegar's private label strength—70 percent share of equalized pints—and the high margins accompanying that.



Indeed, store brands account for five of the top 10 individual item sellers, and command 88 percent of equalized unit volume (EUV) in the low-price white/cider segments, which themselves account for 88 percent of total vinegar category units, 55 percent of its dollars, and most of the promotional activity, according to Nielsen Strategic Planner and LabelTrends data covering food, drug and mass stores (excluding Wal-Mart) in the 52 weeks ended January 27, 2007. [read more](#)

Global report on personal grooming, and the use of health and beauty products

In a society seemingly obsessed with beautiful people and celebrities, where unrealistically thin models strut catwalks and airbrushed photographic images adorn billboards and magazine covers, over two-thirds of consumers the world over agree the pressure to look good is much greater that it was in our parents' day. But that doesn't mean consumers are prepared to spend more to enhance their appearance, or go out of their way to look stylish all the time, according to a recent Nielsen survey. [read more](#)



Health benefits continue to drive red wine sales

Red wine sales were 40 percent higher than the wine category overall, according to new figures generated by The Nielsen Company, suggesting that the



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FMI Annual Financial Review



This annual report provides you with a complete financial picture of the supermarket industry as well as the external business environment, including key ratios, balance sheet, income statement and statement of cash flow. The results are provided for the entire industry as well as by annual sales for more accurate benchmarking. [read more](#)

Shopping for Health



preponderance of positive press for the health benefits of *vino rosso* is having a significant impact on sales in the category.

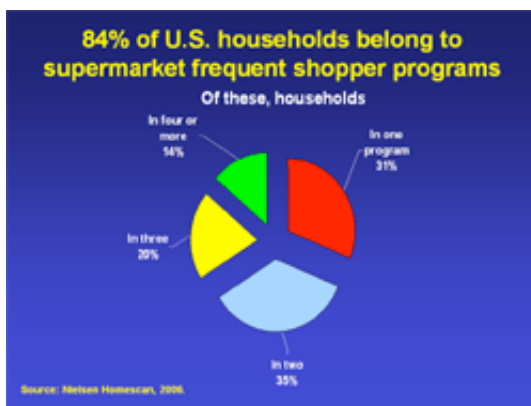
Sales figures showing red wine dollar sales were up 8.5 percent for the 20 weeks ending March 10, versus total wine sales that were up by 6.0 percent. [read more](#)



It's convenient, but is it really loyalty?

Groucho Marx was a brilliant comedic talent, but he might have felt a bit less funny if he had to live by one of his famous wisecracks—that he'd never belong to a club that would have him as a member.

Back then, retailers weren't signing up everyone with an urge for a discount into frequent shopper clubs. They were community grocers in every sense, compared with today's data-driven stores—particularly when it came to satisfying their best customers. [read more](#)



Boning up on added calcium sales

It has been years since doctors have been telling us that women are a) at risk of osteoporosis if they don't consume enough calcium and b) ought to take calcium supplements if they are not getting enough calcium from food sources such as milk, cheese, and other dairy products.

New evidence compiled by The Nielsen Company in a new LabelTrends report suggests that consumers are now choosing their calcium sources in foods and not in supplements or other nutritional aids. [read more](#)

Product	Equivalized Unit Volume	EUV %-change vs. year ago
Canned pineapple	2,403,134	6.8%
Cookies	16,160,435	38.9%
Crackers - flavored snack	148,356	200.2%
Frozen hors d'oeuvres & snacks	788,003	23.8%
Fruit juice - grape - shelf stable	29,718,309	29.7%
Mixes - muffin	11,094,188	21.9%
Dry pasta - spaghetti	17,456	74.5%
Sausage - dinner	493,887	58.7%

Source: The Nielsen Company, Total U.S. Food, Drug, Mass Merchandise Stores (excluding Wal-Mart); 52-weeks ending March 24, 2007

Amazon amazes with auto replenishment grocery service

Consumers who worry that they are going to run out of toilet paper or diapers

This national survey examines shoppers' interest and attitudes, as well as in-store activities, regarding health and nutrition, consumers' efforts to manage their health, and the ways in which health and nutritional concerns play out in purchase decisions at the grocery store. This report brings a practical understanding of the relationship between food shopping and health. [read more](#)

Speaks



FMI's Speaks is the annual state of the industry report for food retailers. The report reviews the important changes and trends and puts them into an industry perspective. It presents detailed information on supermarket operations, store-level benchmarks and outlines strategic and competitive issues. [read more](#)

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or detergent or paper towels or the kids' favorite cookies now have a new solution - a grocery automatic replenishment service just introduced by Amazon.com.

The online retailer, which got into the grocery business about a year ago when it began selling 14,000 non-perishable items on its website, has actually expanded its selection by more than 50 percent to 22,000 - and about 10 percent of them are available at a 15 percent discount using the new Subscribe & Save program. [read more](#)

Spinach sales fall abates

While last year's fatal E.coli contamination continues to hurt spinach sales in each of its fresh produce segments, other factors may be adding to the depth and persistence of the double-digit drop, suggests Steve Lutz, executive vice president, Perishables Group, East Wenatchee, WA.

The long road back begins

	4 Weeks		24 Weeks	
	\$ Sales	\$ %change vs. year ago	\$ Sales	\$ %change vs. year ago
Packaged spinach	\$4,360,849	(28.9%)	\$18,685,081	(43.2%)
Packaged salad spinach	\$5,776,013	(23.6%)	\$23,244,218	(42.4%)
Bulk spinach	\$1,294,680	(15.2%)	\$5,567,536	(28.4%)
Packaged salad - non-spinach	\$134,256,227	(5.8%)	\$721,728,358	(8.9%)

Source: Perishables Group powered by The Nielsen Company, U.S. grocery chains (excluding Wal-Mart, club stores, and independent chains, and alternative formats such as Whole Foods and Wild Oats), for the 4 weeks and 24 weeks ended February 24, 2007.

"We don't know how much spinach was replanted during the crisis. Very cold weather in California this winter could have damaged leafy green fields," he told *Facts, Figures & the Future*. [read more](#)

CHANNEL WATCH

- The Nielsen Company estimates that in 2006, over \$15.2 billion was spent across all retail channels in the pet food category which includes dry, moist, and wet cat food; dry, moist, wet dog food; cat & dog treats; domestic bird food; wild bird food; remaining pet food. [read more](#)

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