

Inflation trends in ecommerce

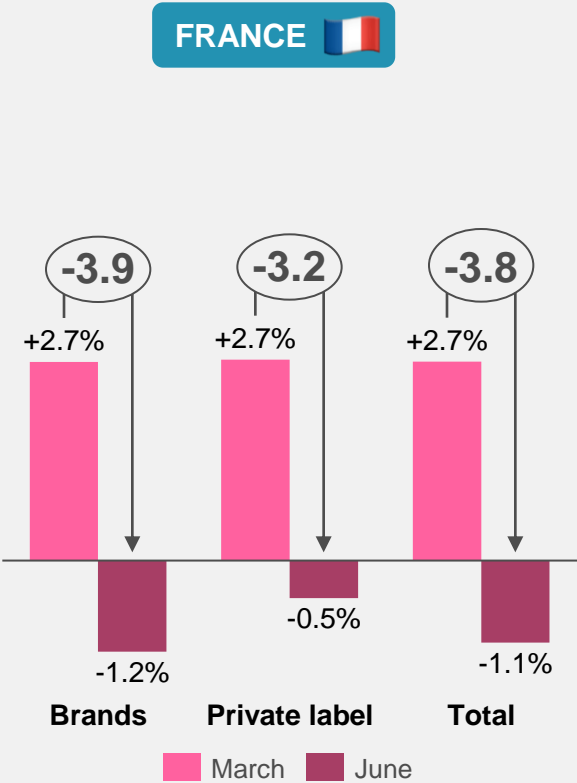
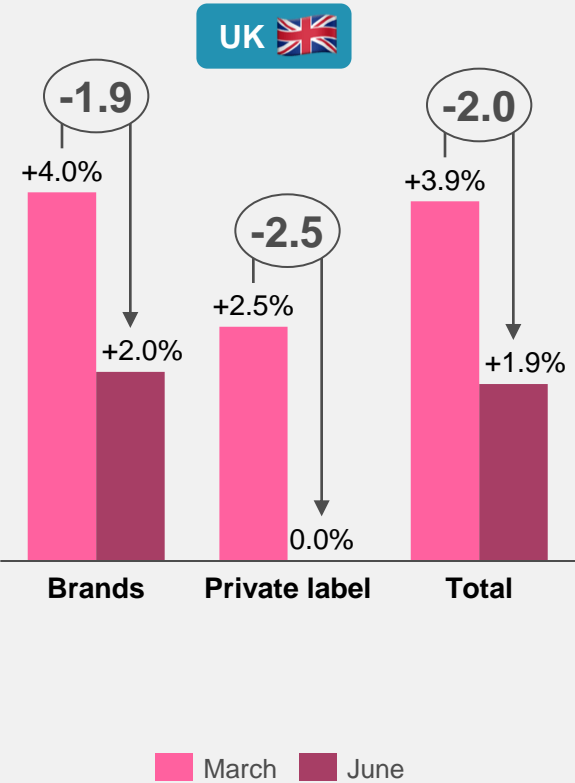
UK
June 2024 vs June 2023



INFLATION 

June 2024 vs June 2023
March 2024 vs March 2023 

Inflation slows down



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UK 

Pricing benchmark

Analysis objectives

- Analyze variation in average prices between June 2024 and June 2023

Methodology

- **Retailers included:** Asda, Sainsbury's, Tesco, Amazon, Waitrose, Morrisons, Ocado
- **Products included:** A selection of 30 categories
Standard SKU with ND > 10% in June 2024 and June 2023
Products can differ according to retailers
- **Calculation:** The more products in a retailer or category, the more weight they are given in the total
Total = arithmetical average of base prices by product

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Pricing benchmark

Number of analyzed products

Category	Asda UK	Sainsburys	Tesco	Amazon UK	Waitrose	Morrisons UK	Ocado UK	Total retailer
Cheese	402	365	403		313	335	466	2284
Cereals	369	369	342	78	312	299	718	2487
Chocolate	313	360	291	78	273	249	619	2183
Hair Care	272	294	290	39	143	400	366	1804
Skin Care	222	254	231	67	108	360	376	1618
Skin Cleansing	96	123	95	2	58	168	185	727
Oral Care	90	85	74		61	114	108	532
Fabric Cleaning	28	28	25	5	28	58	65	237
Fabric Enhancers	32	33	30	2	20	36	40	193
Beer	382	457	403	24	246	454	593	2559
Adult Incontinence	65	49	58	1	46	68	67	354
Consumer Tissue	62	62	66	44	65	62	152	513
Feminine Hygiene	68	83	72	3	76	81	173	556
Chips & Snacks	347	354	348	39	297	293	643	2321
Fresh Spices & herbs	55	66	73	4	19	49	141	407
Dry Spices & herbs	290	152	282	122	32	293	552	1723
Frozen Spices & herbs	4	3	4			6	14	31
Sweet biscuit	673	654	595	68	513	501	1067	4071
Deodorants & Fragrances	48	52	43	1	24	67	43	278
Home & Hygiene	111	115	79	9	71	173	136	694
Ice Cream	75	89	67		54	104	104	493
Dressings	380	332	345	25	192	585	462	2321
Yoghurt	451	419	324	3	262	294	463	2216
World foods	380	411	419	57	285	320	740	2612
Gift Sets					1	3	6	10
Sauces	97	113	83	19	85	63	203	663
Frozen pizza	68	48	57		19	48	76	316
Frozen Meat Free	69	84	68		29	59	95	404
Frozen Desserts	16	12	33		21	23	36	141
Frozen Vegetables	4	3	4		5	6	14	36
Grand Total	5469	5469	5204	690	3658	5571	8723	34784

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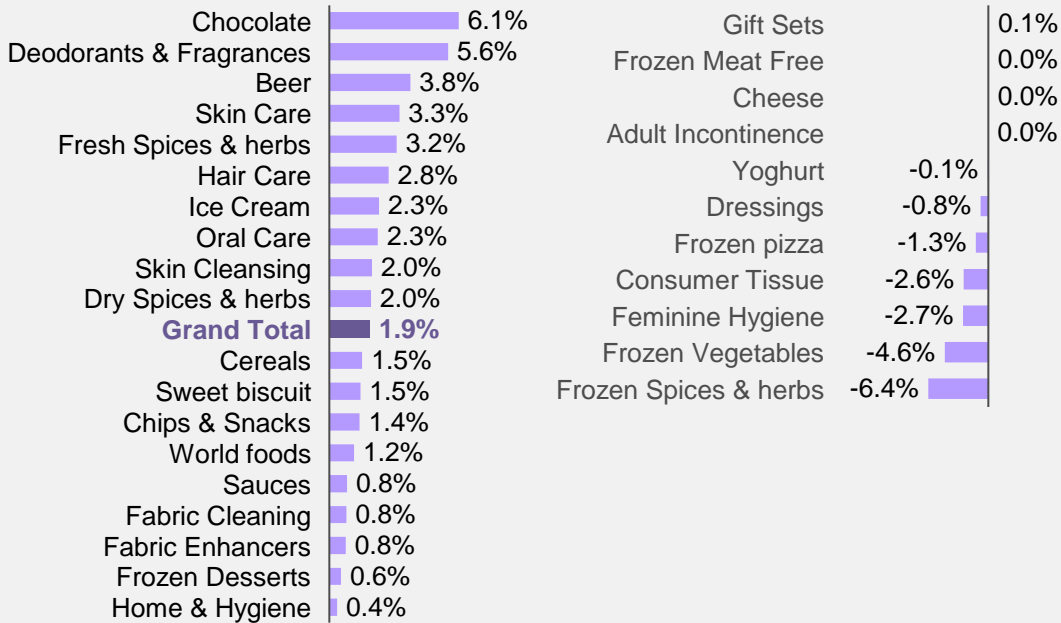
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Executive summary

Frozen products & paper are in deflation

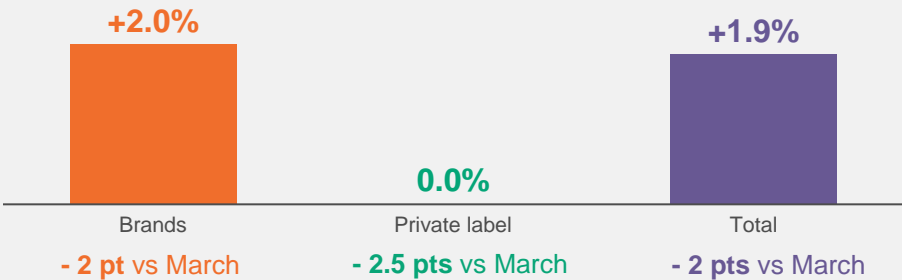
Total retailer June 2024 vs June 2023

UK price inflation by category



Summary

- In June 2024, overall prices increased by +1.9% compared to 2023, only with branded products whereas private label is flat.
- Chocolate is the category with the highest inflation rates because of bad crop. Conversely, frozen foods continue to deflate, as seen in March 2024.
- Waitrose has the highest inflation rate (+3.1%), all retailers are experiencing disinflation except Amazon +13.4 pts vs March 2024.



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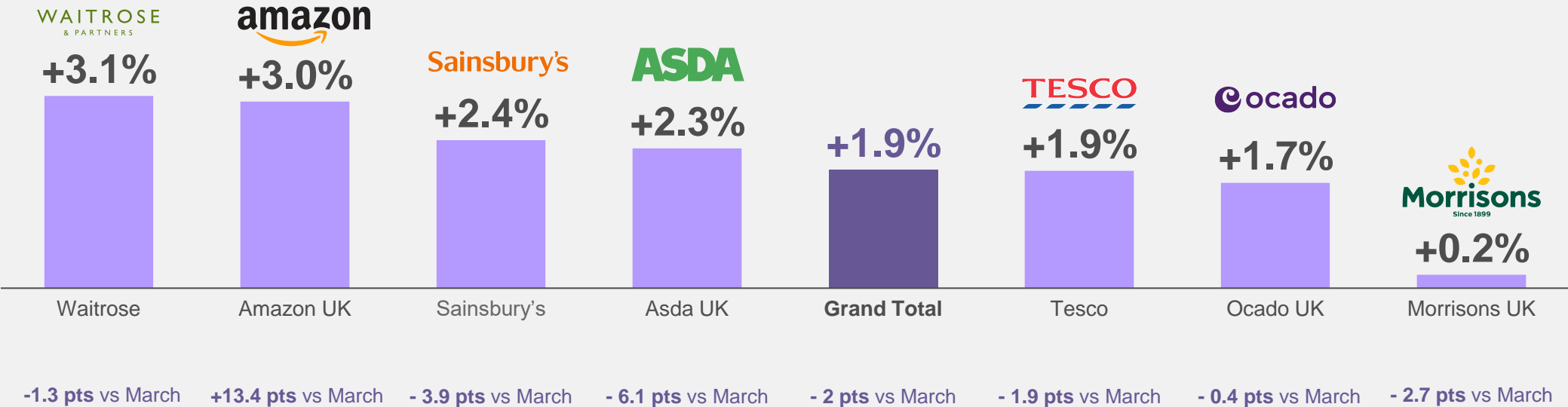
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The trend is towards disinflation for all retailers

Except for Amazon having decrease prices in March

Total categories June 2024 vs June 2023

UK price inflation by retailer



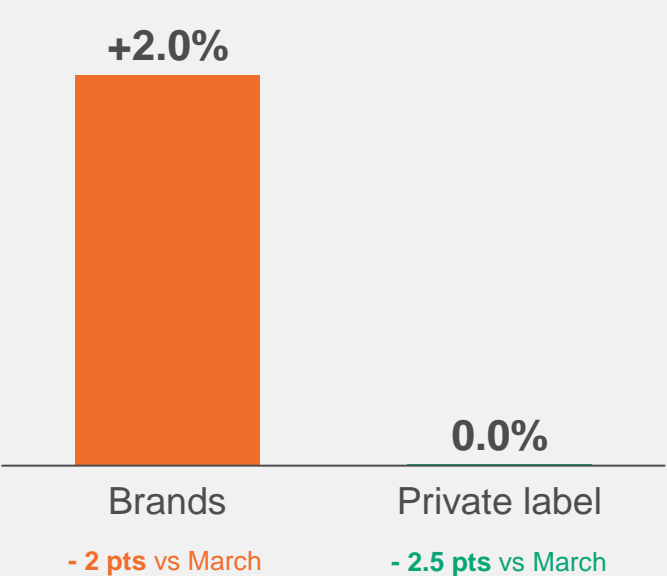
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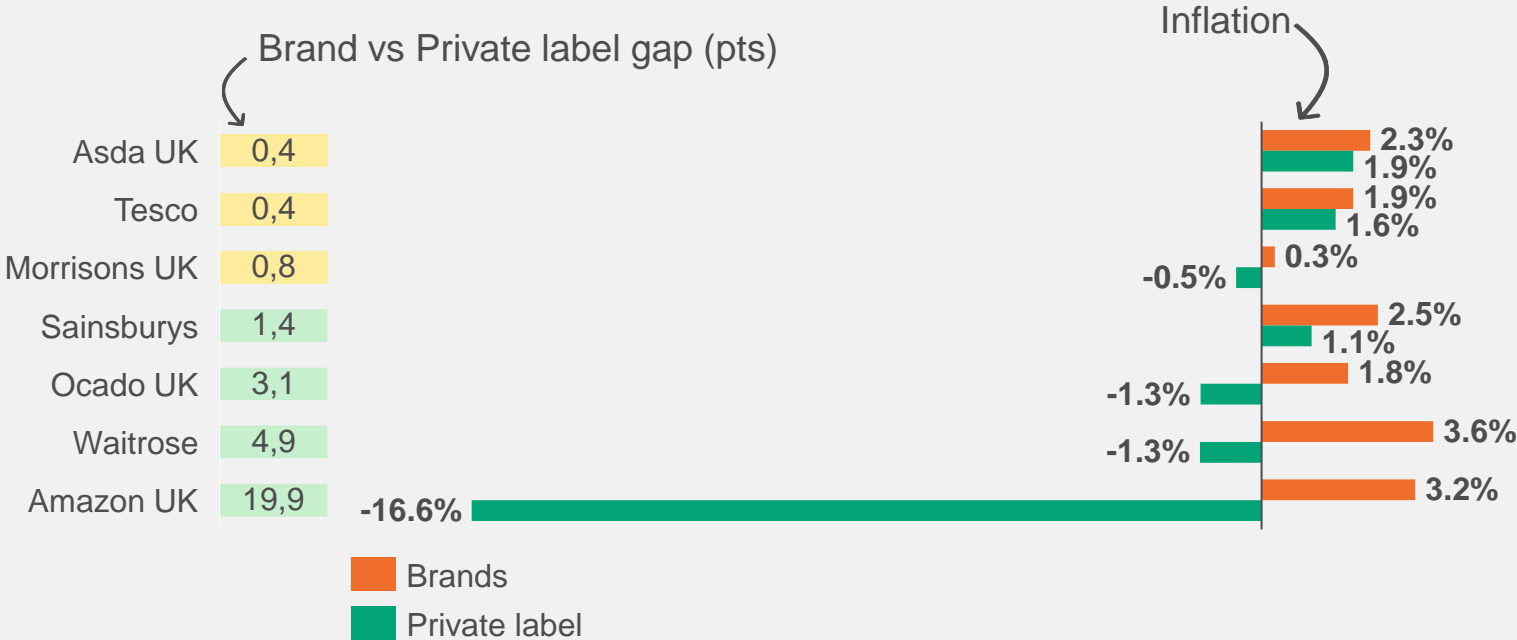
Private label is deflating at 4 retailers.

-2 pts compared to brands

Total categories total retailer June 2024 vs June 2023
UK price inflation by type of brand



Total categories total retailer June 2024 vs June 2023
UK price inflation by type of brand

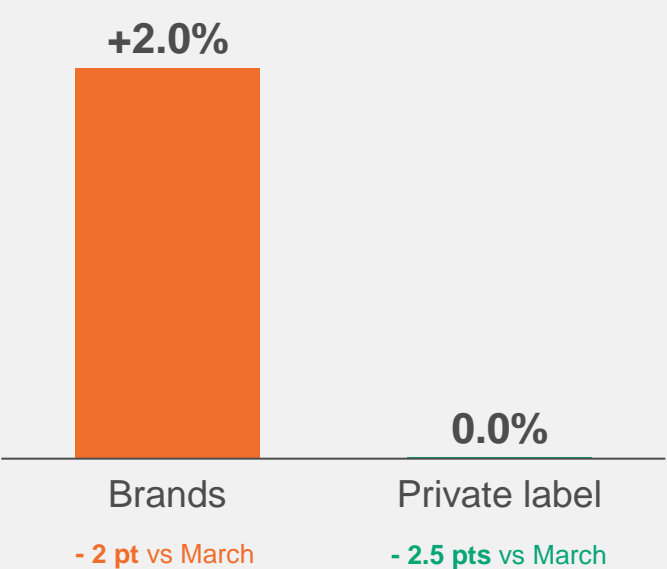


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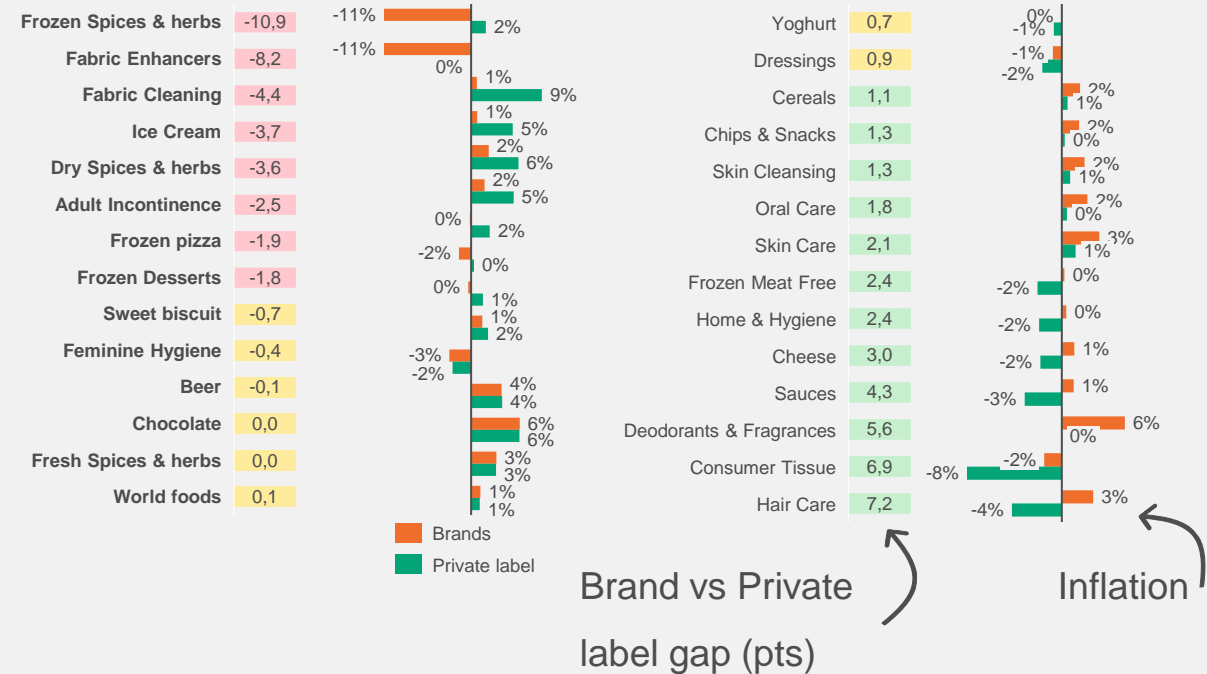
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Frozen food deflation is driven by branded product

Total categories total retailer June 2024 vs June 2023
UK price inflation by category



Total categories total retailer June 2024 vs June 2023
UK price inflation by category



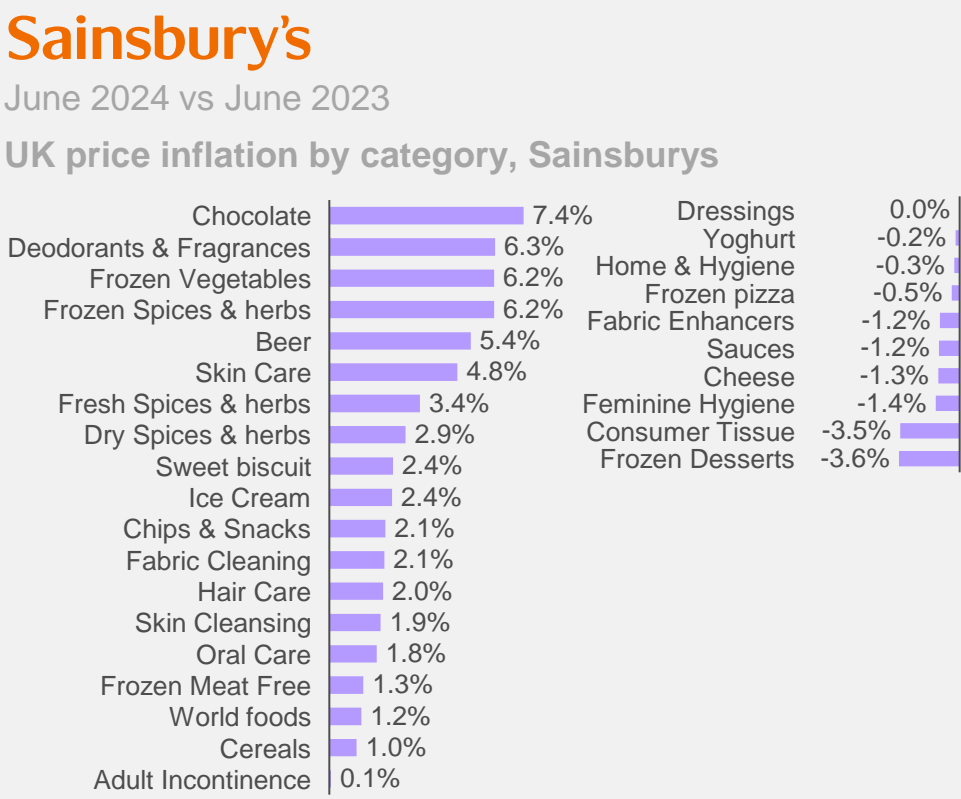
Appendix

Inflation by retailer

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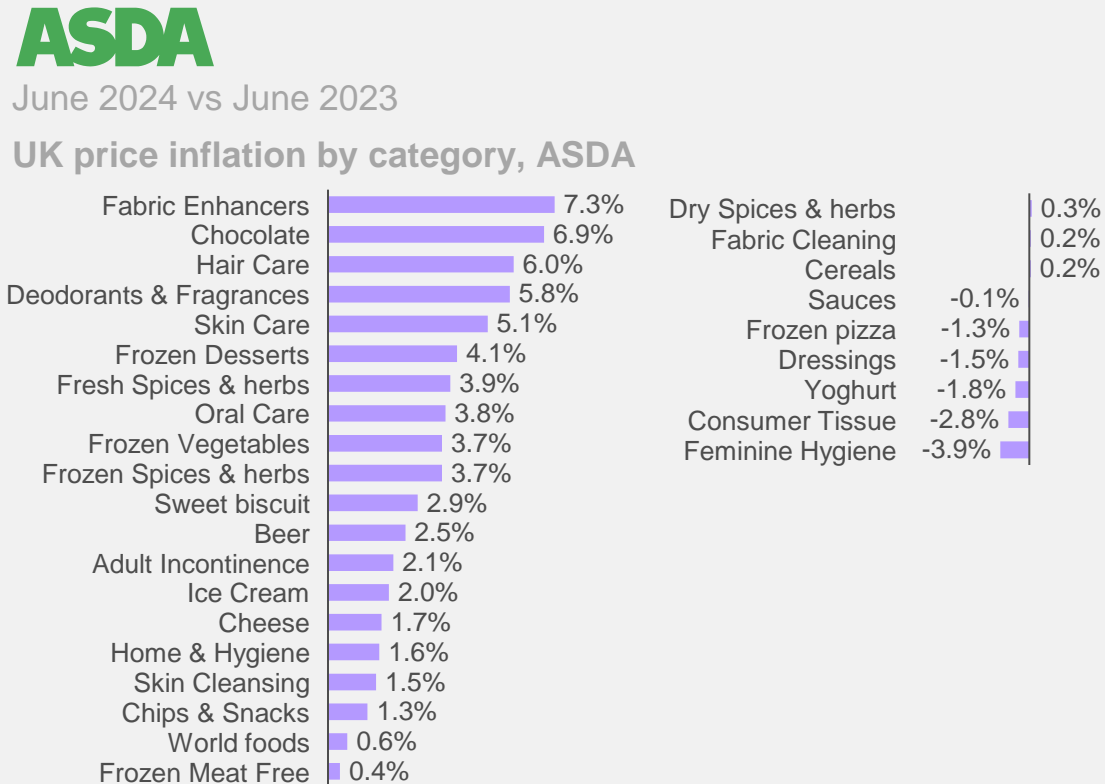
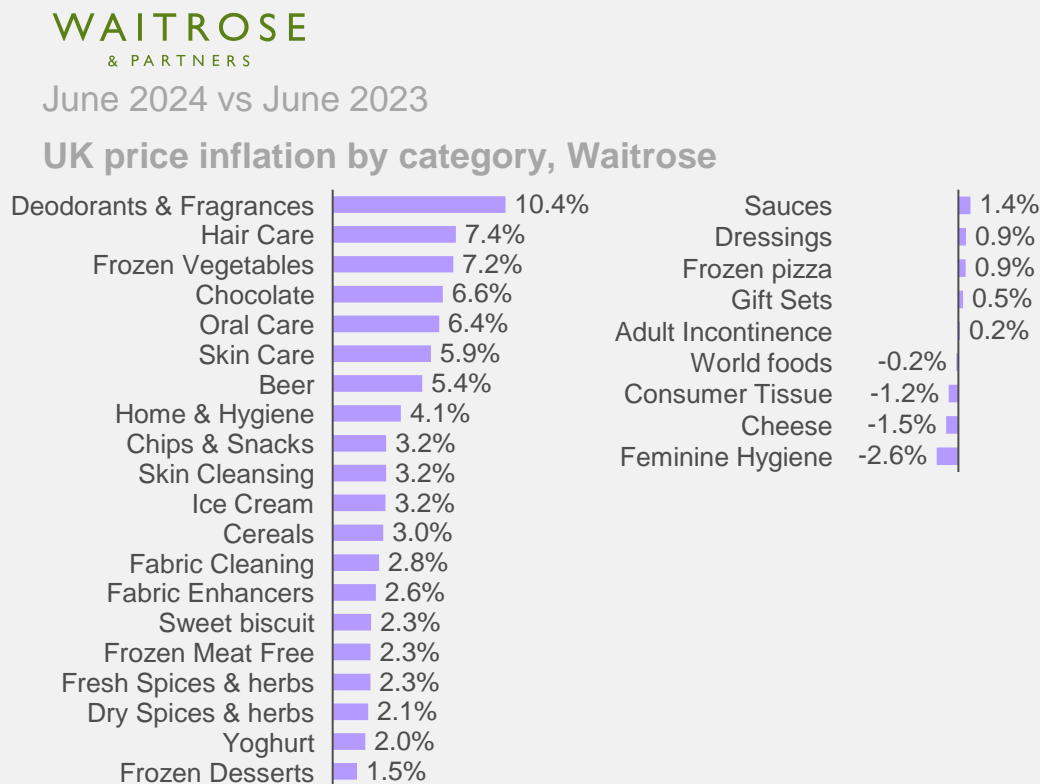
Deflation started on few categories



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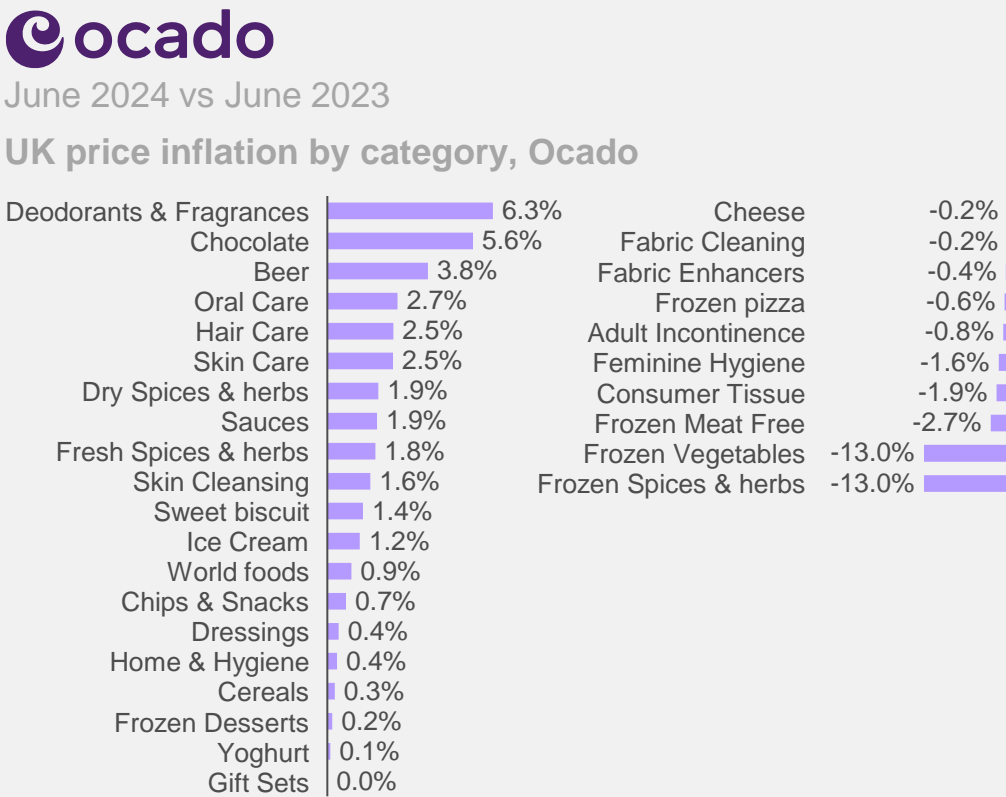
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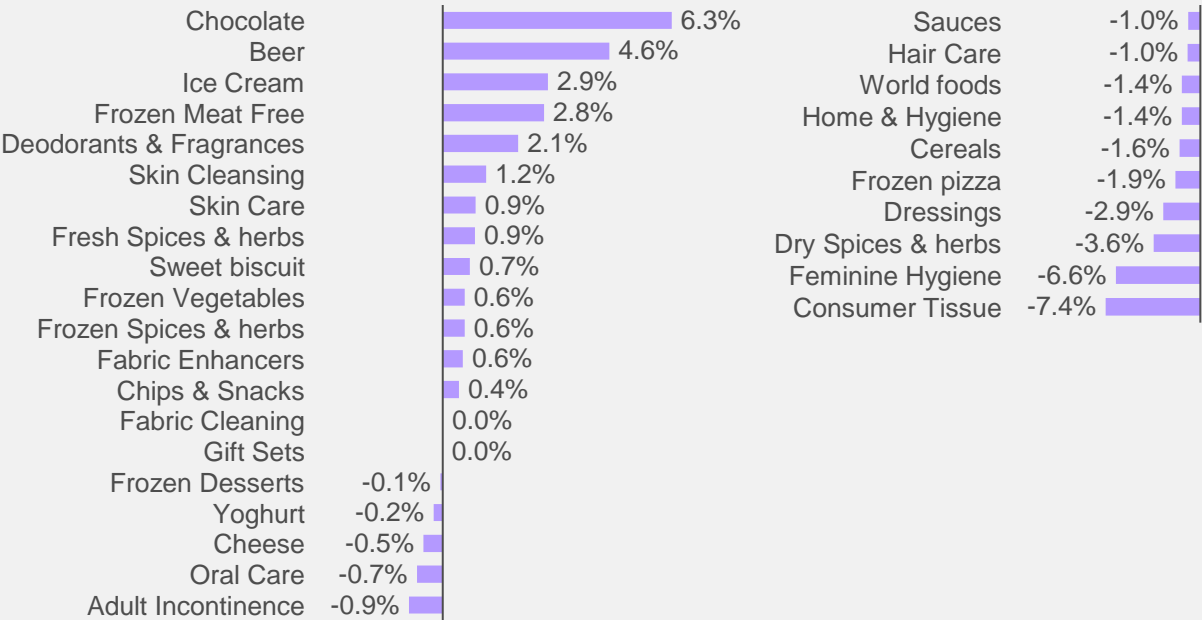
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Deflation started on few categories



June 2024 vs June 2023

UK price inflation by category, Morrisons



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