



Exploring the impact of COVID-19 on retail purchase and price promotion in Scotland: 2019-2020.

Supplementary report. Weekly purchasing patterns of a selection of individual food and drink categories.

Contents

1. About Food Standards Scotland	3
2. About this report	4
3. Take home purchase of individual food and drink categories	5
3.1 Sweet biscuits	8
3.2 Crisps and savoury snacks	10
3.3 Confectionery	12
3.4 Puddings and desserts	14
3.5 Frozen dairy desserts	16
3.6 Regular soft drinks	18
3.7 Cakes and pastries	20
3.8 Alcoholic drinks	22
3.9 Fruit	24
3.10 Vegetables	26
3.11 Canned goods	28
3.12 Ambient carbohydrates and snacks	30
3.13 Total bread	32
3.14 Sweet home cooking	34
3.15 Savoury home cooking	36
3.16 Total meat	38
3.17 Total fish	40
4. Conclusion	42

1. About Food Standards Scotland

Food Standards Scotland (FSS) is the public sector food body for Scotland. We are here to ensure that information and advice on food safety and standards, nutrition and labelling is independent, consistent, evidence-based and consumer-focused.

Our primary concern is consumer protection – making sure that food is safe to eat, ensuring consumers know what they are eating, and improving nutrition. With that in mind, our vision is to deliver a food and drink environment in Scotland that benefits, protects and is trusted by consumers.

FSS was established by the Food (Scotland) Act 2015 as a non-ministerial office, part of the Scottish Administration, alongside but separate from the Scottish Government. We are mainly funded by the government but we also charge fees to recover costs for regulatory functions.

See more at: foodstandards.gov.scot/about-us

Food Standards Scotland
4th Floor
Pilgrim House
Aberdeen
AB11 5RL

foodstandards.gov.scot

@FSScot

Prepared by Lesley Curtis, Lyndsay Davidson and Alana McDonald, Nutrition Science and Policy Branch at Food Standards Scotland.

2. About this report

This report provides a detailed breakdown of the purchase of a selection of individual food and drink categories into the home in Scotland, including on price promotion, between 2020 and 2019. The information contained within this supplementary report should be read in conjunction with the main report '*Exploring the impact of COVID-19 on retail purchase and price promotion in Scotland: 2019-2020*'¹ which also provides full details on methodology and context for the results.

In summary:

- The data presented within this report were provided by Kantar for Food Standards Scotland (FSS).
- Analyses and reporting of data was carried out by FSS in collaboration with Kantar.
- The data presented relates to retail purchasing in Scotland, and refers to take home purchases. It does not include food and drink purchased for consumption outside the home (OOH). It is important to note that a significant proportion of the OOH sector stopped operating due to the national lockdown between March and July 2020, and a considerable proportion of purchasing behaviour moved from out of home to in home (i.e. retail). Additionally, the advice to stay at home and the closure of schools and many workplaces will have contributed to changes in purchasing patterns.
- The data presented is purchase data only and this does not necessarily equate to consumption, as factors such as waste and cooking losses are not accounted for.
- The data does not provide motivations for purchase, such as stockpiling, which was widely reported in the media in the run up to the national lockdown in March 2020.
- Weekly trends in purchase are presented between week ending 6th January 2019 and week ending 27th December 2020.

<https://www.foodstandards.gov.scot/publications-and-research/publications/exploring-the-impact-of-covid-19-on-retail-purchase-and-price-promotion-in-scotland-between-2019-and-2020>

¹ [Exploring the impact of COVID-19 on retail purchase and price promotion in Scotland: 2019-2020 | Food Standards Scotland](https://www.foodstandards.gov.scot/publications-and-research/publications/exploring-the-impact-of-covid-19-on-retail-purchase-and-price-promotion-in-scotland-between-2019-and-2020)

3. Take home purchase of individual food and drink categories

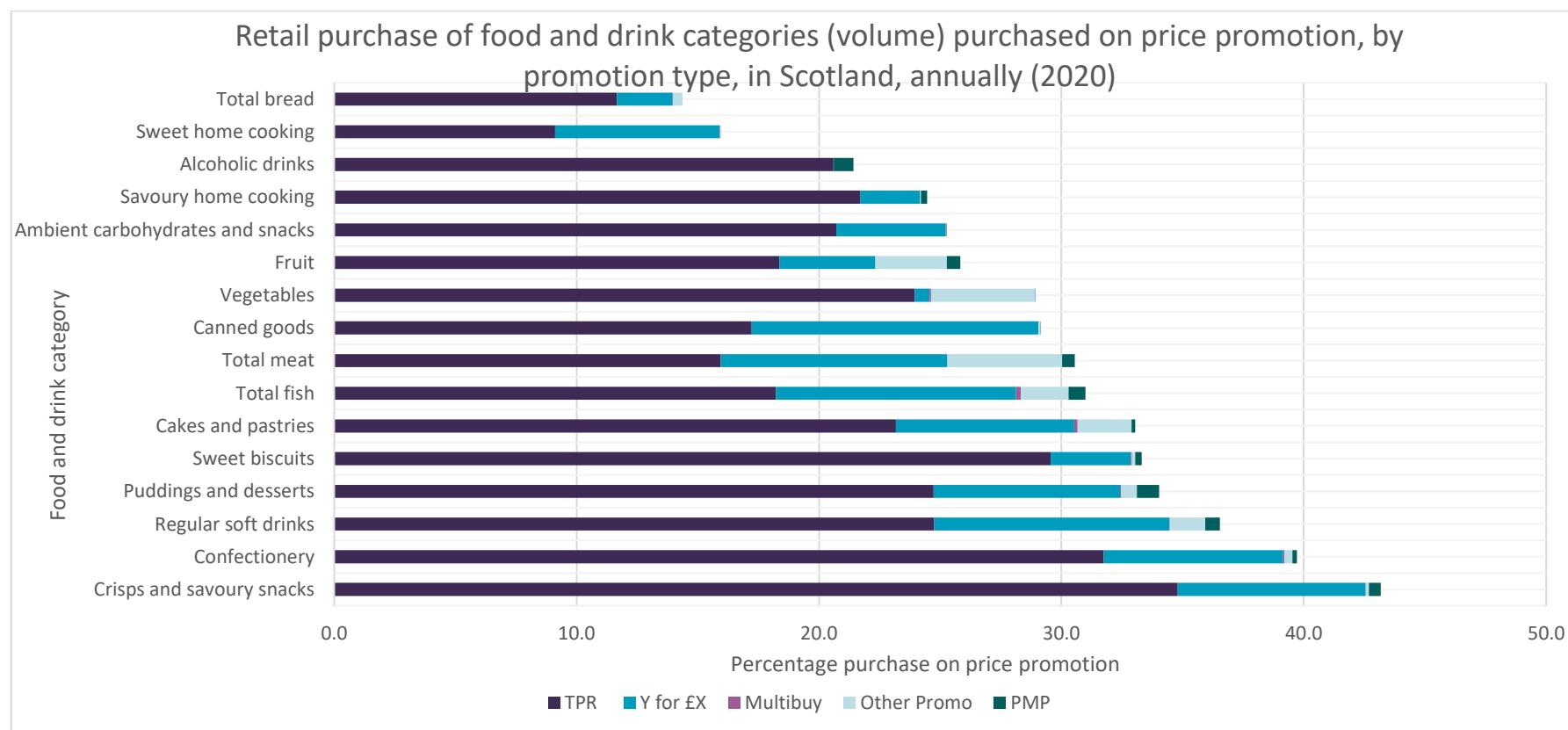
Table 1 below presents the percentage change in the volume of individual food and drink categories purchased into the home between 2019 and 2020. The data shows that the purchase of several individual categories purchased increased in 2020, at a level beyond the increase in overall total food and drink purchase (8.2%). This included savoury home cooking (21.4%), alcoholic drinks (19.3%), sweet home cooking (18.3%), ambient carbohydrates and snacks (14.6%), crisps and savoury snacks (13.2%), canned goods (12.8%), total fish (12.7%), vegetables (11.6%), confectionery (9.7%), total meat (9.5%), and sweet biscuits (8.6%). A number of other categories also increased over this time, but to a lesser extent than the overall increase in total food and drink including regular soft drinks (7.2%), bread (6.8%), fruit (5.9%) and puddings and desserts (4.1%).

Table 1 Percentage change in volume of food and drink categories purchased into the home in Scotland (2020 vs. 2019)

Category	Volume: % change (2020 vs. 2019)
Total Food & Drink	8.2
Savoury home cooking	21.4
Alcoholic drinks	19.3
Sweet home cooking	18.3
Ambient carbohydrates and snacks	14.6
Crisps and savoury snacks	13.2
Canned Goods	12.8
Total fish	12.7
Vegetables	11.6
Confectionery	9.7
Total meat	9.5
Sweet biscuits	8.6
Regular soft drinks	7.2
Total bread	6.8
Fruit	5.9
Puddings and desserts	4.1
Cakes and pastries	1.1
Frozen dairy desserts	-6.5

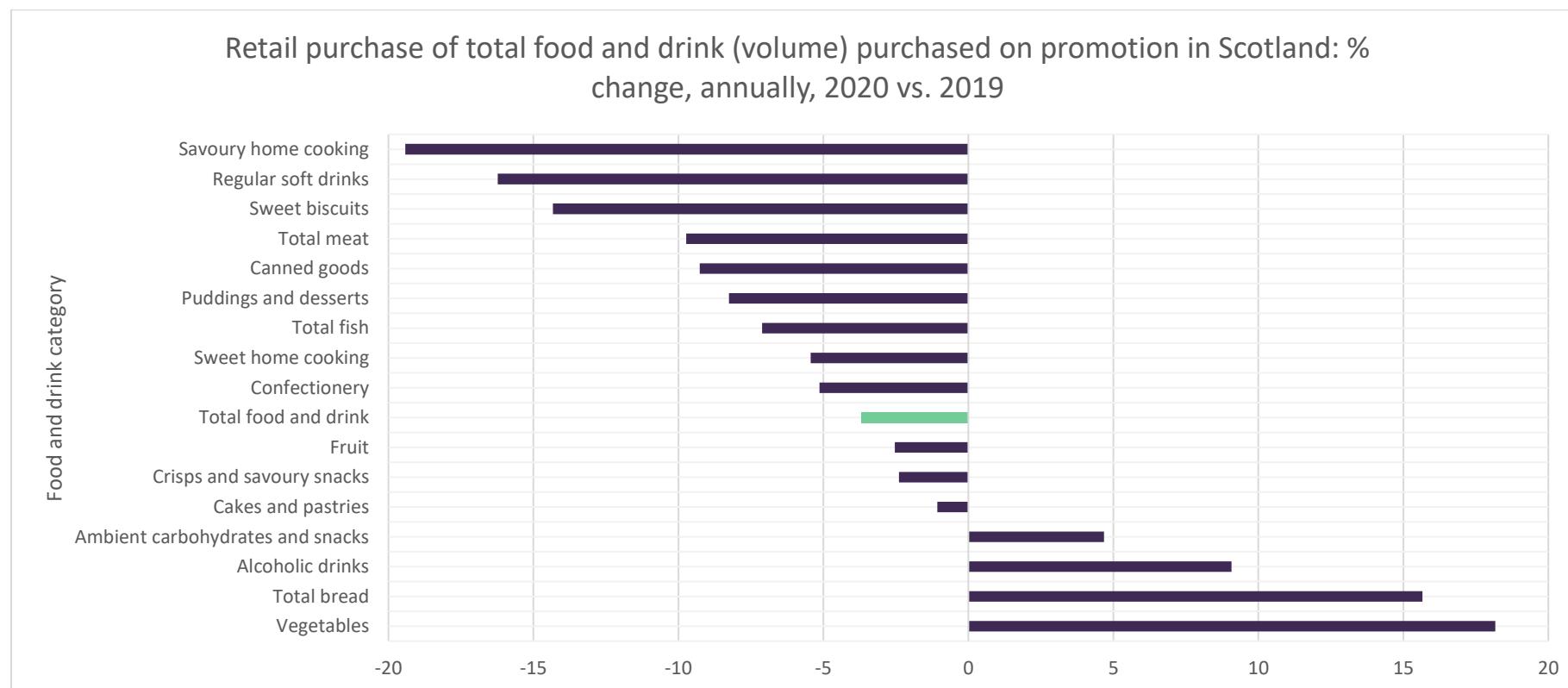
This data illustrates the volume of individual food and drink categories purchased on price promotion, broken down by price promotion type, in 2020. Of these categories, crisps and savoury snacks were purchased most on price promotion (43.1%) and total bread was least (14.4%). The data shows that on average in 2020, more discretionary food and drink categories were purchased on price promotion (36.9%) than non-discretionary foods (24.7%). The data also shows that TPR accounted for the majority of the food and drink categories that were purchased into the home, on a price promotion, in 2020. This also aligns with previous FSS monitoring of purchase on price promotions.

Figure 1 Retail purchase of food and drink categories (volume), purchased on price promotion type in Scotland, annually: 2020



Despite a decline (-3.7%) in total food and drink purchased into the home on price promotion in 2020, compared to 2019, the purchase of a number of individual categories on price promotion increased over this time as, demonstrated in Figure 2 below. The data shows that the take home purchase of vegetables (18.2%) total bread (15.7%), alcoholic drinks (9.1%) and ambient carbohydrates and snacks (4.7%) on price promotion increased in 2020 compared with 2019. The volume of a number of other categories purchased on price promotion declined, with several showing a greater level of decline than overall total food and drink. This includes savoury home cooking (19.4%) regular soft drinks (16.2%), sweet biscuits (14.3%), sweet home cooking (5.4%), puddings and desserts (8.3%), canned goods (9.3%), and total meat (9.7%).

Figure 2 Retail purchase of total food and drink (volume) purchased on promotion in Scotland: % change, annually, 2020 vs. 2019



3.1 Sweet biscuits

The data shows that for most weeks in 2020, a higher volume of sweet biscuits was purchased, compared with the same weeks in 2019, except for weeks one and two in January and week four in March.

In 2020 33.3% of sweet biscuits were purchased into the home on price promotion, compared with 38.9% in 2019. TPRs accounted for the majority of sweet biscuits purchased on price promotion, ranging from 42.9% of volume in January week 1 to 21.9% in June week 1. 'Y for £X' offers were the next most common type of price promotion within sweet biscuits, however these only represented between 1.1% and 6.9% of volumes purchased in 2020.

Figure 3 Retail purchase of sweet biscuits (volume) in Scotland, weekly: 2020 vs. 2019

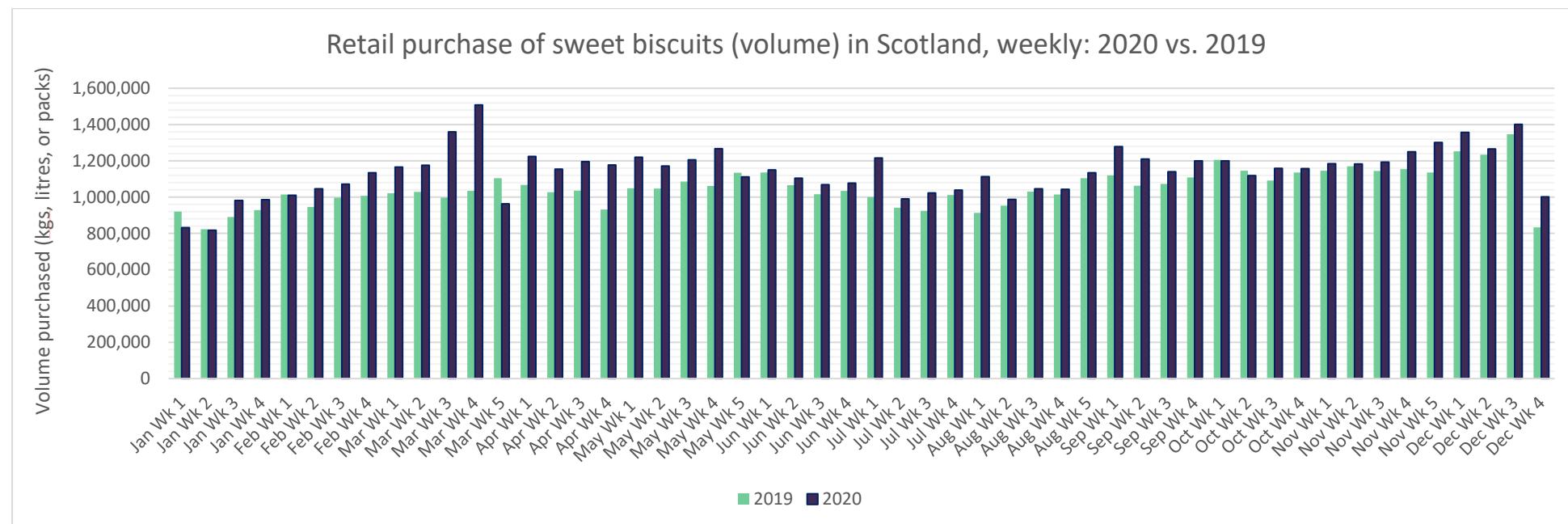
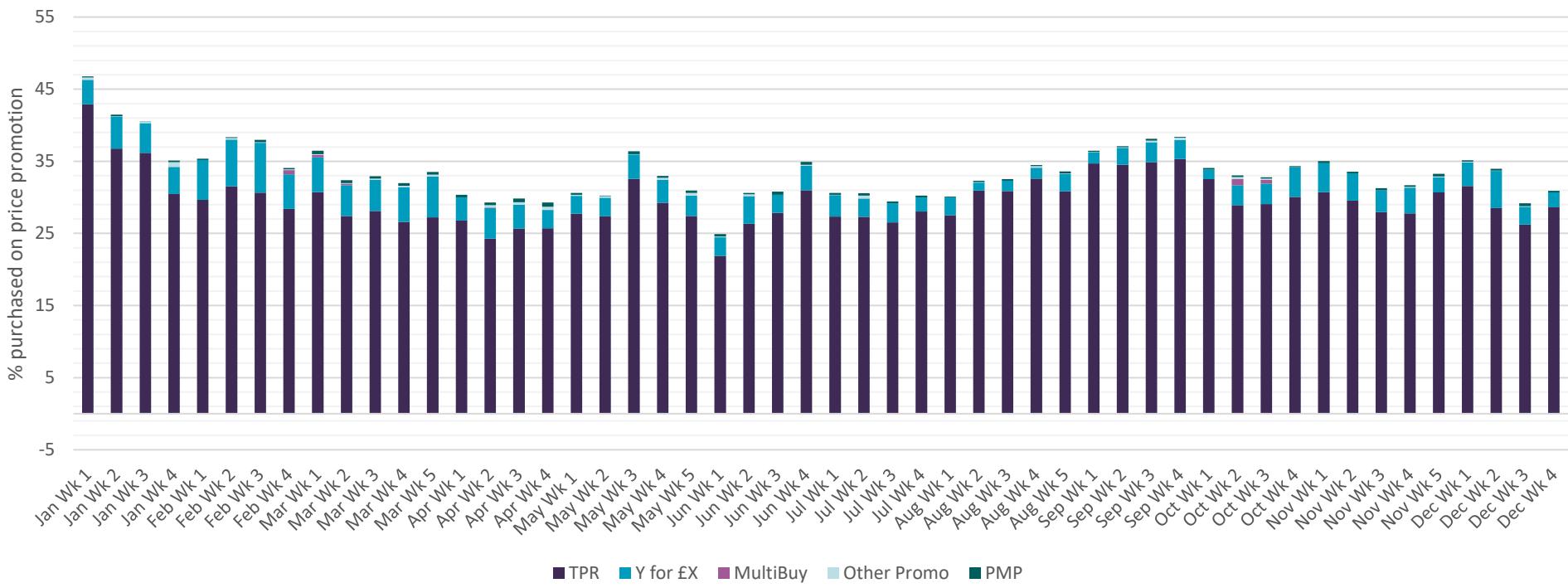


Figure 4 Retail purchase of sweet biscuits (volume) purchased on price promotion in Scotland, by promotion type, weekly: 2020

Retail purchase of sweet biscuits (volume) purchased on price promotion in Scotland, by promotion type, weekly: 2020



3.2 Crisps and savoury snacks

For most weeks in 2020, a higher volume of crisps and savoury snacks was purchased, compared with 2019. This peaked in week 4 of March when purchase of crisps and savoury snacks was 49.2% higher in 2020 compared to the same weeks in 2019.

In 2020, 43.2% of crisps and savoury snacks purchased into the home in Scotland was purchased on price promotion, compared with 44.2% in 2019. TPR accounted for the greatest proportion of crisps and savoury snacks purchased on price promotion with the highest percentage observed in August week 5 (41.8% volume) and the lowest in May week 2 (26.1% of volume).

Figure 5 Retail purchase of crisps and savoury snacks (volume) in Scotland, weekly: 2020 vs. 2019

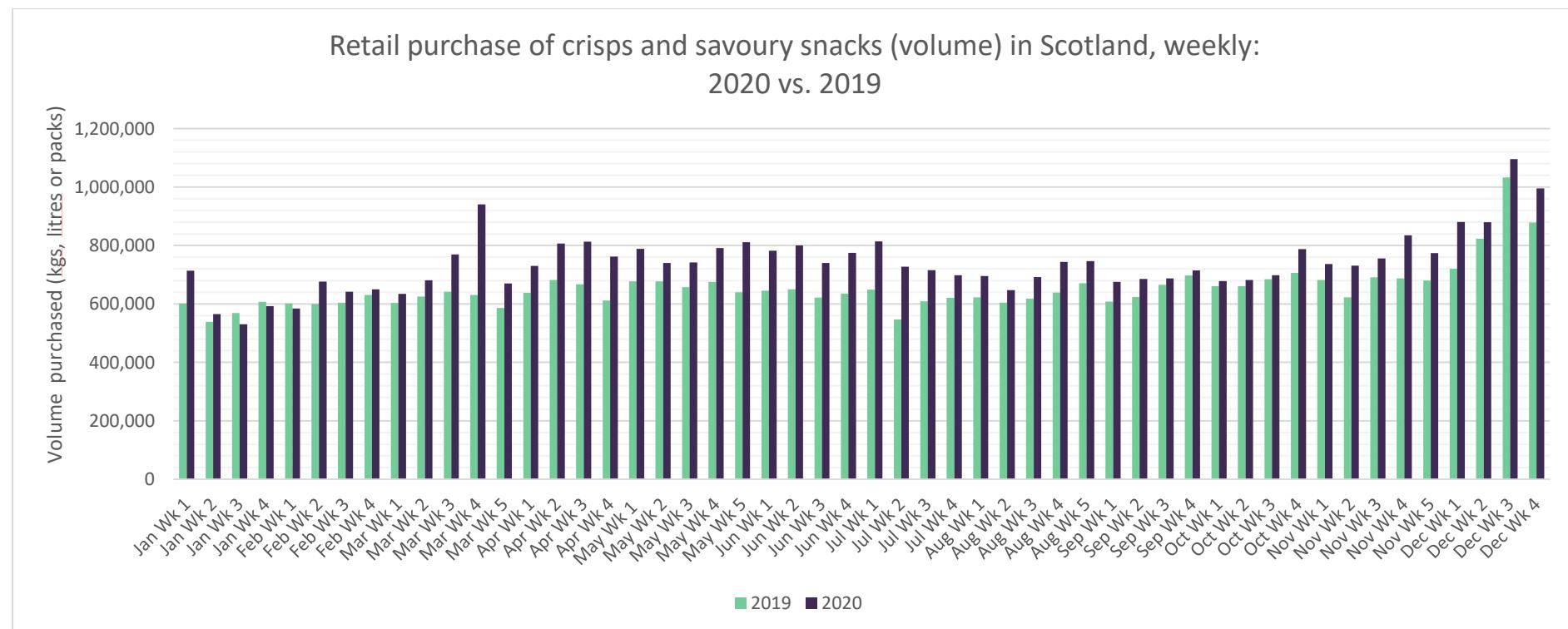
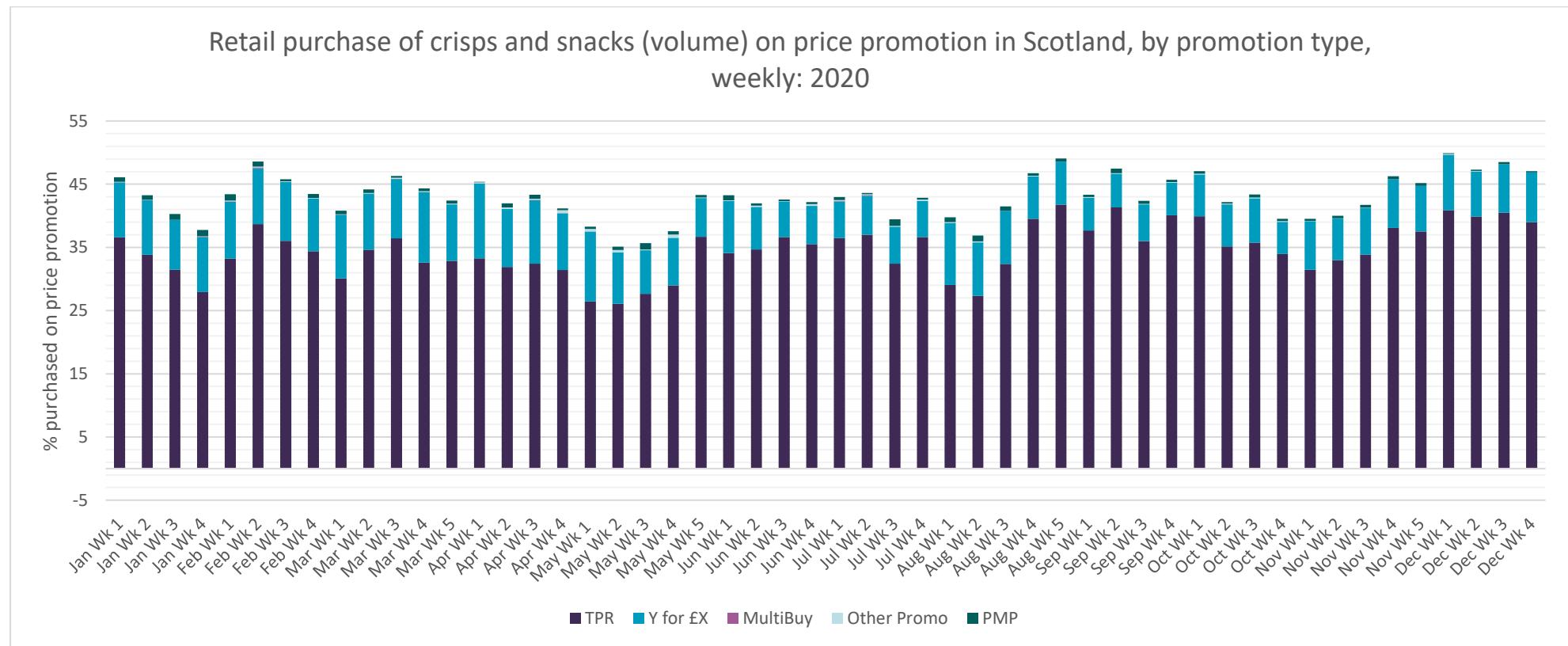


Figure 6 Retail purchase of crisps and snacks (volume) on price promotion in Scotland, by promotion type, weekly: 2020



3.3 Confectionery

The data shows that for most weeks in 2020, a higher volume of confectionery was purchased compared with the same weeks in 2019.

In 2020, 39.7% of confectionery purchased into the home in Scotland was purchased on price promotion, compared with 41.9% in 2019. TPRs were the most common form of price promotion within confectionery, ranging from 43.4% of volume in January week 1 to 23.4% of volume in March week 1. 'Y for £X' promotions were the next most common, representing up to 18.5% of volume in 2020 (November week 4).

Figure 7 Retail purchase of confectionery (volume) in Scotland, weekly: 2020 vs. 2019

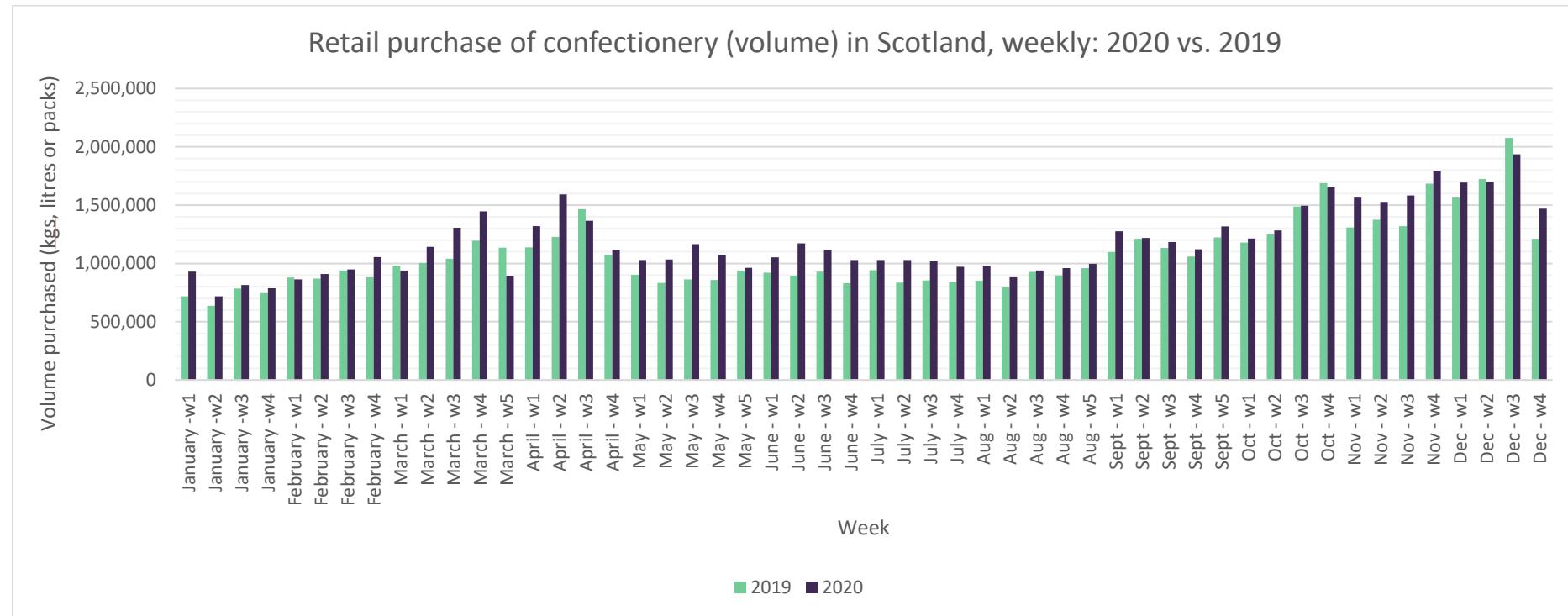
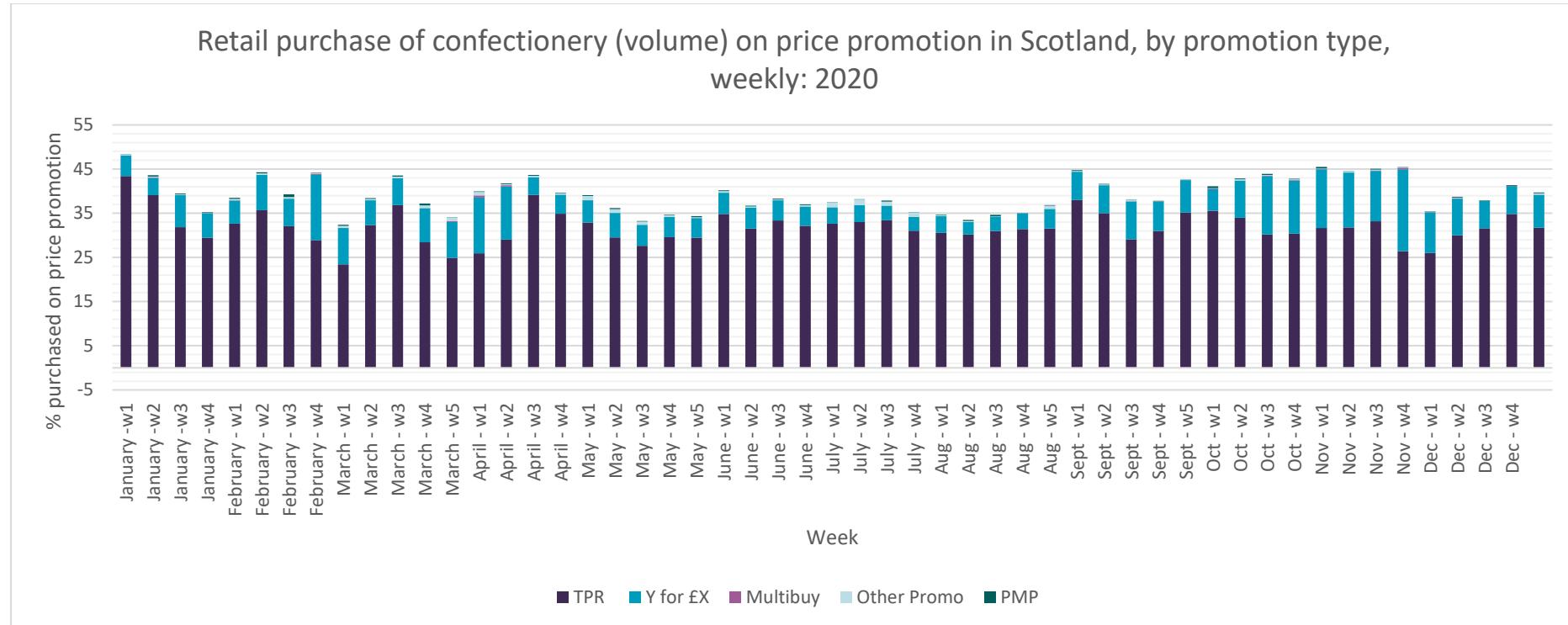


Figure 8 Retail purchase of confectionery (volume) on price promotion in Scotland, by promotion type, weekly: 2020



3.4 Puddings and desserts

The data shows that more puddings and desserts were purchased most weeks during 2020, compared with 2019. In particular, purchase of puddings and desserts was 41.7% higher in March week 4 and 20.1% higher in December week 4 of 2020, compared with 2019.

In 2020, 34.0% of puddings and desserts purchased into the home in Scotland were purchased on price promotion, compared with 37.1% in 2019. As with other categories, TPR was the generally the most dominant type of price promotion (15.1% - 30.0% of volume) followed by 'Y for £X' deals (3.5% - 15.8% of volume).

Figure 9 Retail purchase of puddings and desserts (volume) in Scotland, weekly: 2020 vs. 2019

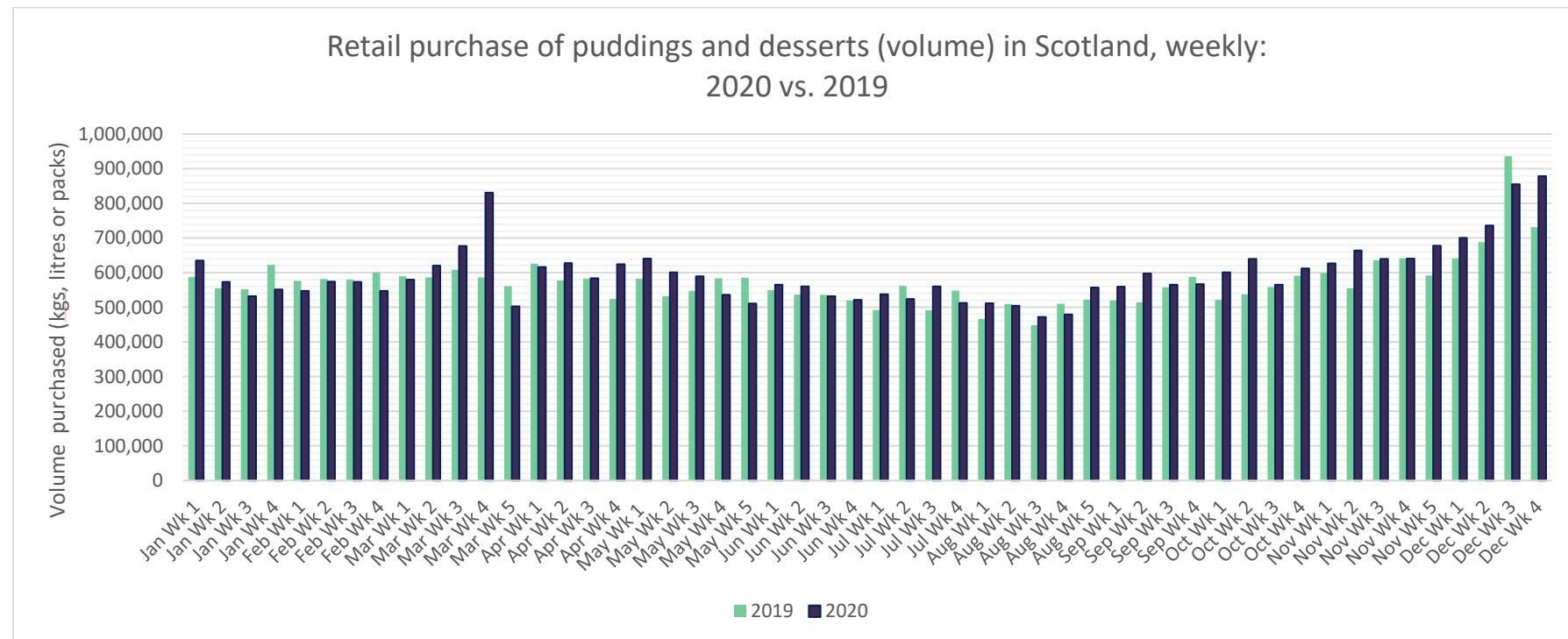
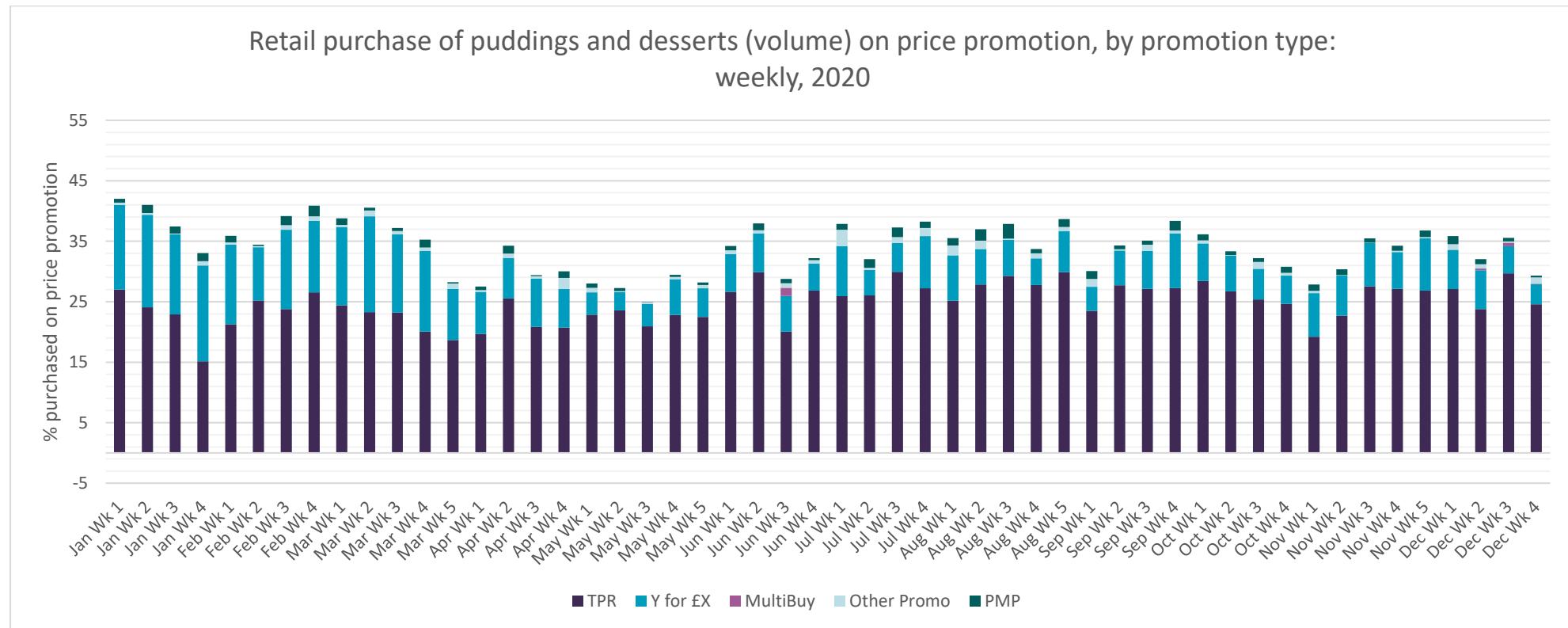


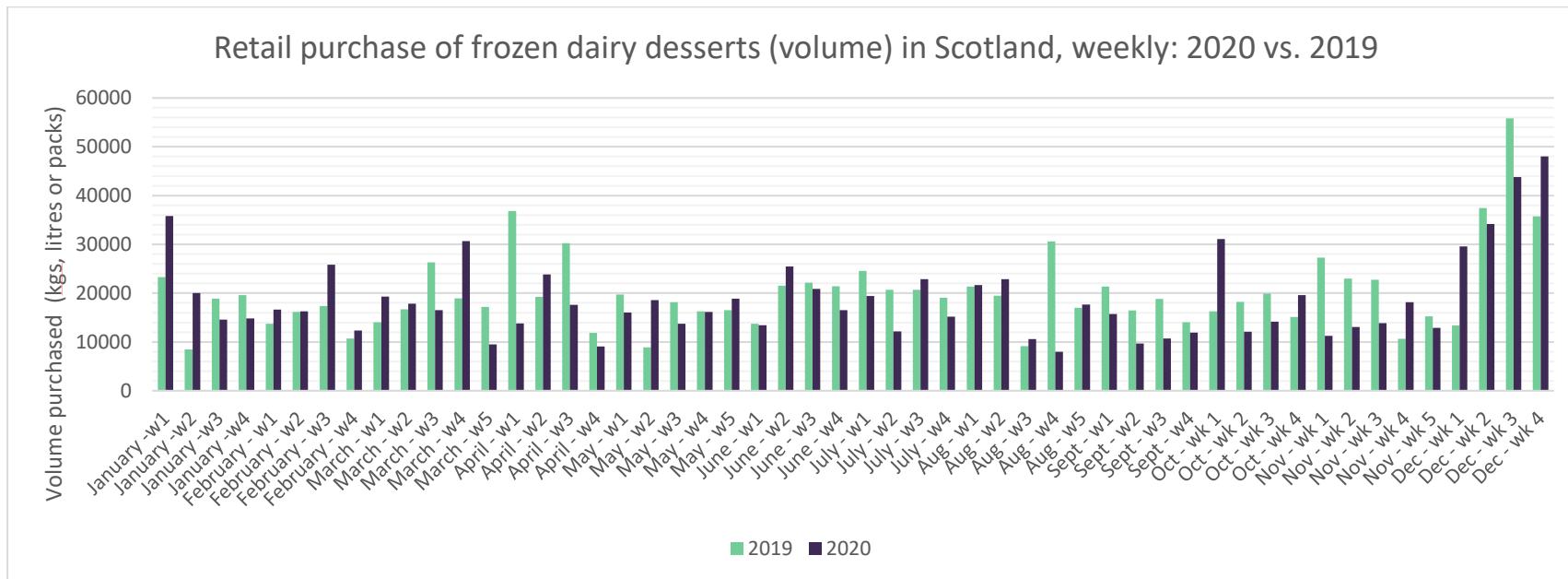
Figure 10 Retail purchase of puddings and desserts (volume) on price promotion, by promotion type: weekly, 2020



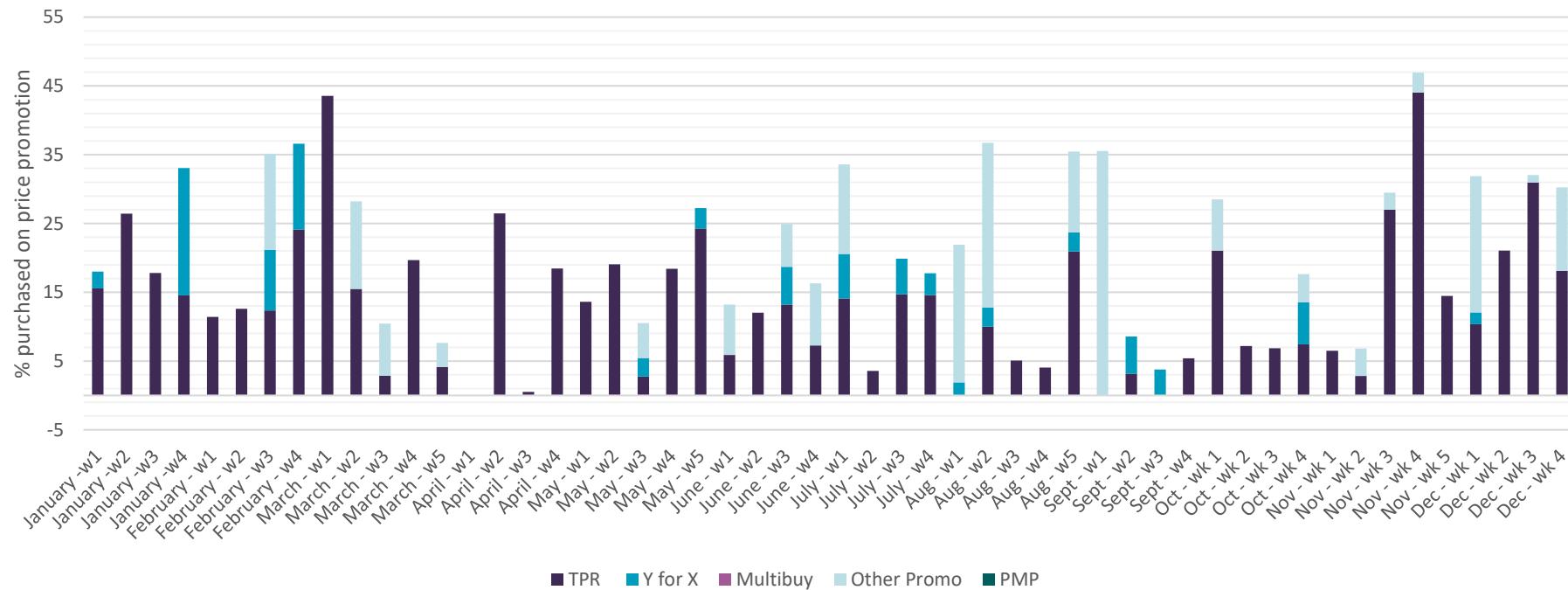
3.5 Frozen dairy desserts

The data shows that the purchase of frozen dairy desserts declined in 2020, compared to 2019. However, some weeks in 2020 saw an increase in take home purchase for this category, such as during week 4 of March, week 1 of October and week 4 in December.

In 2020, 21.8% of frozen dairy desserts were purchased into the home in Scotland was on price promotion, compared with 19.3% in 2019. The data shows TPRs accounted for the greatest proportion of fruit purchased on price promotion (0.0% -30.9% of volume) followed by 'other promo' offers (0.0% - 35.5% of volume).



Retail purchase of frozen dairy desserts (volume) on price promotion in Scotland, by promotion type, weekly: 2020



3.6 Regular soft drinks

The data shows that more regular soft drinks were generally purchased from early April 2020 onwards compared to the same weeks in 2019. There were some exceptions to this, including some individual weeks in May, August and December. Purchase of regular and other soft drinks can be influenced by the weather, and associated purchase of alcoholic drinks as a complimentary category.

In 2020, 36.5% of regular soft drinks into the home in Scotland were purchased on price promotion, compared with 43.6% in 2019. Purchase of regular soft drinks on TPR ranged from 19.5% - 30.2% of volume in 2020. Purchase as part of a 'Y for £X' offer was highest earlier in the year, reaching 16.9% of volume in March week 4.

Figure 11 Retail purchase of regular soft drinks (volume) in Scotland, weekly: 2020 vs. 2019

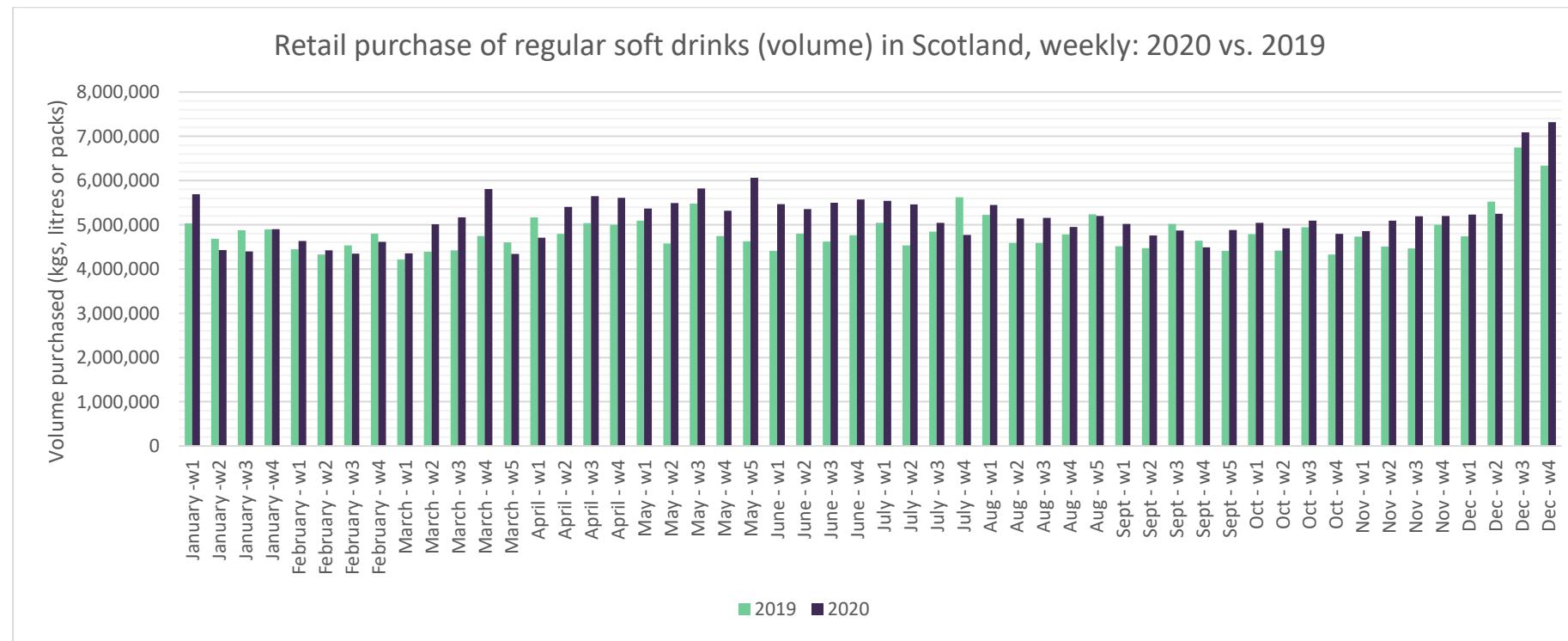
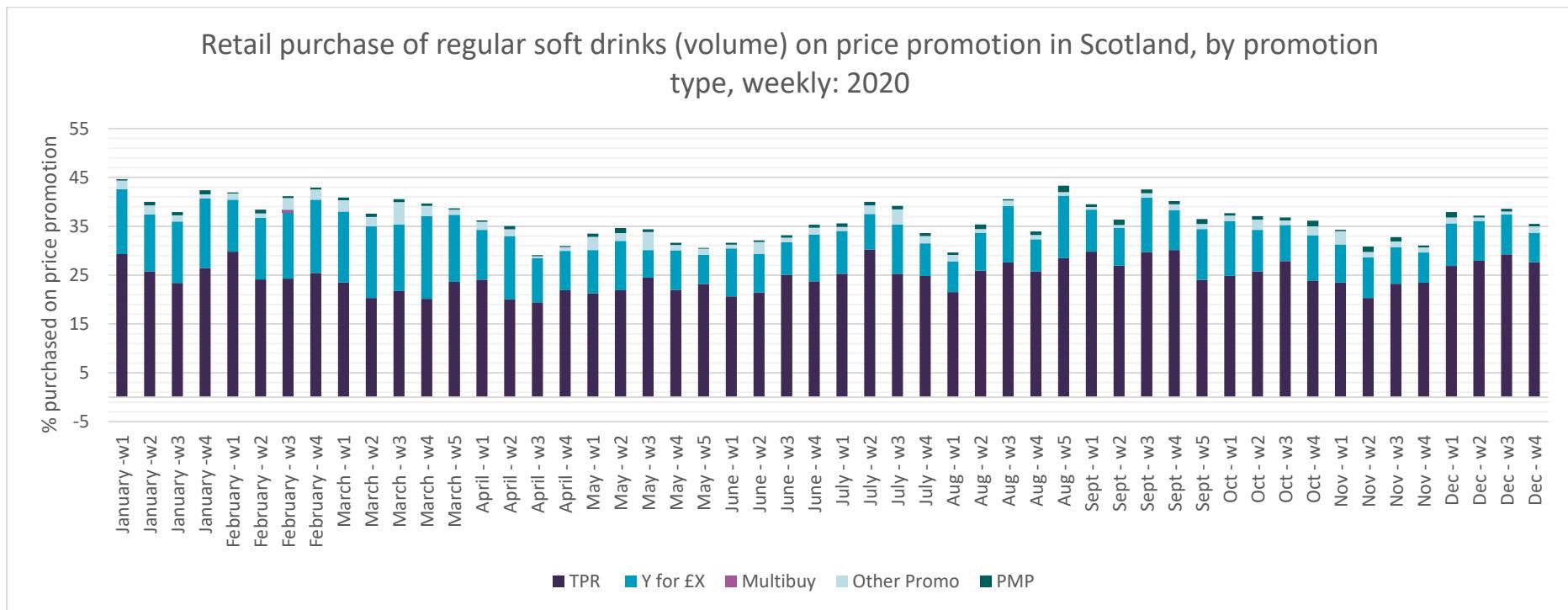


Figure 12 Retail purchase of regular soft drinks (volume) on price promotion in Scotland, by promotion type, weekly: 2020



3.7 Cakes and pastries

The increase in purchase of cakes and pastries in 2020 was driven by the greatest increase in purchase during March week 4. Some other weeks also saw an increase in take home purchase for this category in 2020, compared to 2019, but there was less variation compared to other categories on a weekly basis. Therefore, the overall growth of this category is lower compared to total food and drink.

In 2020, 33.0% of cakes and pastries into the home in Scotland were purchased on price promotion, compared with 33.4% in 2019. TPR's were the most prevalent form of price promotion in 2020 accounting for 19.6% - 29.9% of volumes purchased, followed by 'Y for £X' offers which accounted for 2.7% - 13% of volumes purchased.

Figure 13 Retail purchase of cakes and pastries (volume) in Scotland, weekly: 2020 vs. 2019

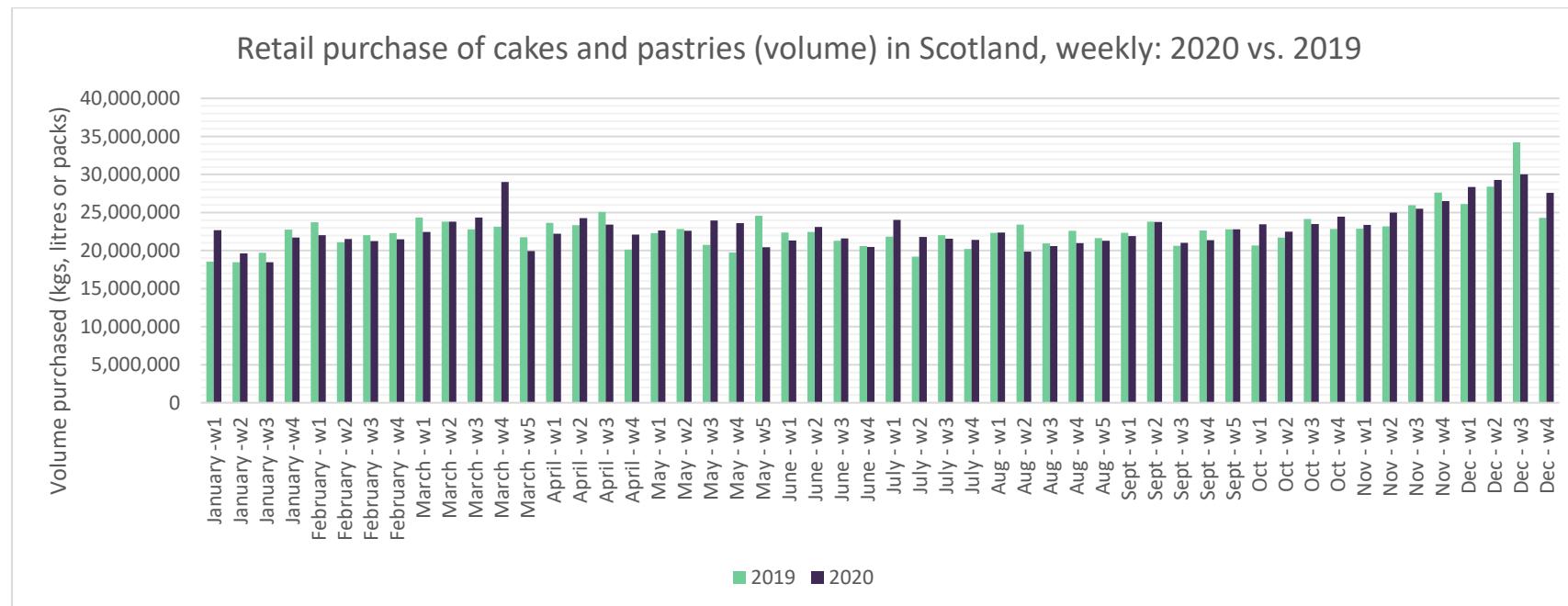
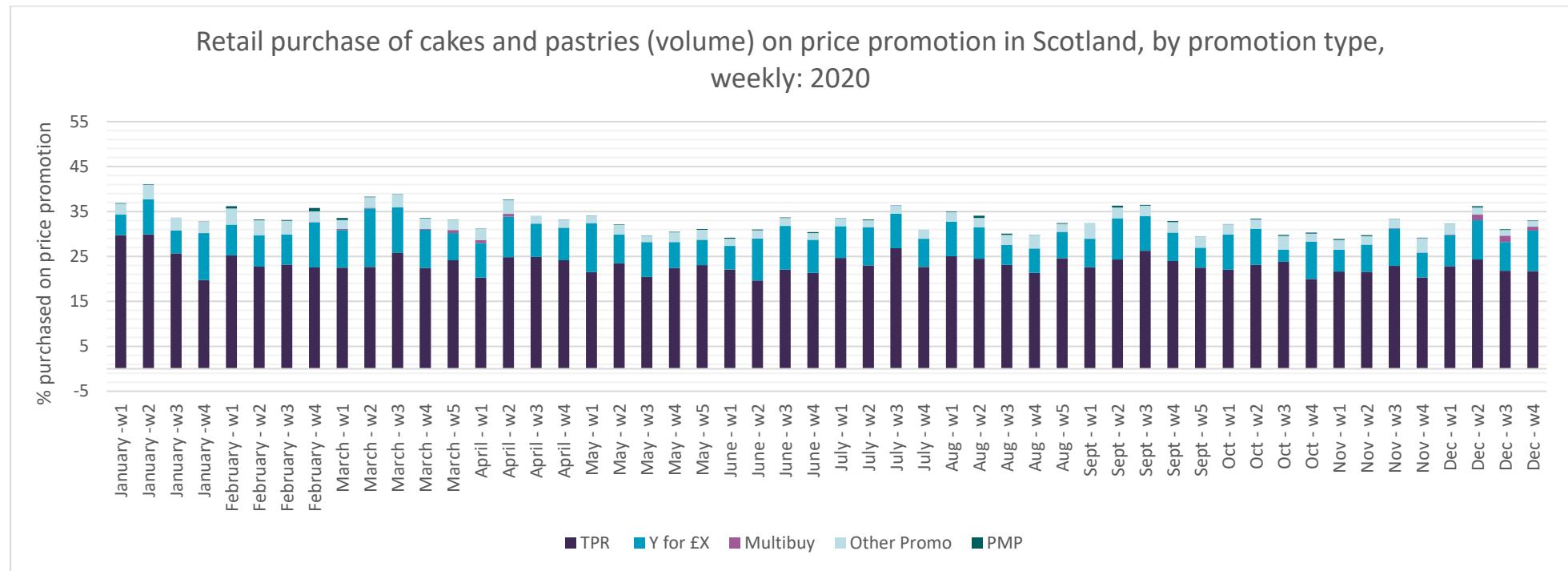


Figure 14 Retail purchase of cakes and pastries (volume) on price promotion in Scotland, by promotion type, weekly: 2020



3.8 Alcoholic drinks

The data shows the highest volume of alcoholic drinks purchased in 2020 was March week 4 (an increase of 59.5% compared to the same week in 2019). Purchase of alcoholic drinks in 2020 remained consistently higher each week from March week 4 onwards, compared with the same weeks in 2019.

In 2020, 21.4% of alcoholic drinks purchased into the home in Scotland were purchased on price promotion, compared with 19.6% in 2019. TPRs accounted for almost all purchase of alcoholic drinks on price promotion in 2020, ranging from 14% of volume in week 3 of April to 30.5% of volume in week 3 of December. The only other form of price promotion observed was PMP accounting for between 0.2% and 1.9% of volumes purchased.

Figure 15 Retail purchase of alcoholic drinks (volume) in Scotland, weekly: 2020 vs. 2019

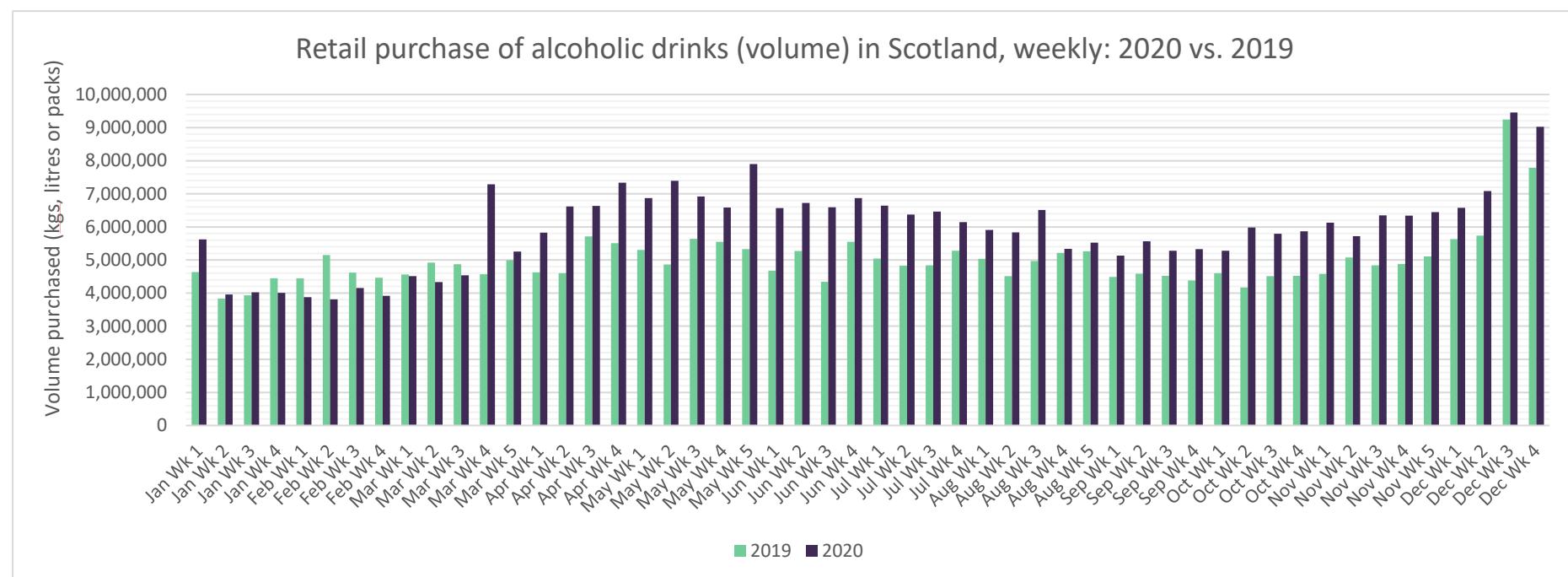
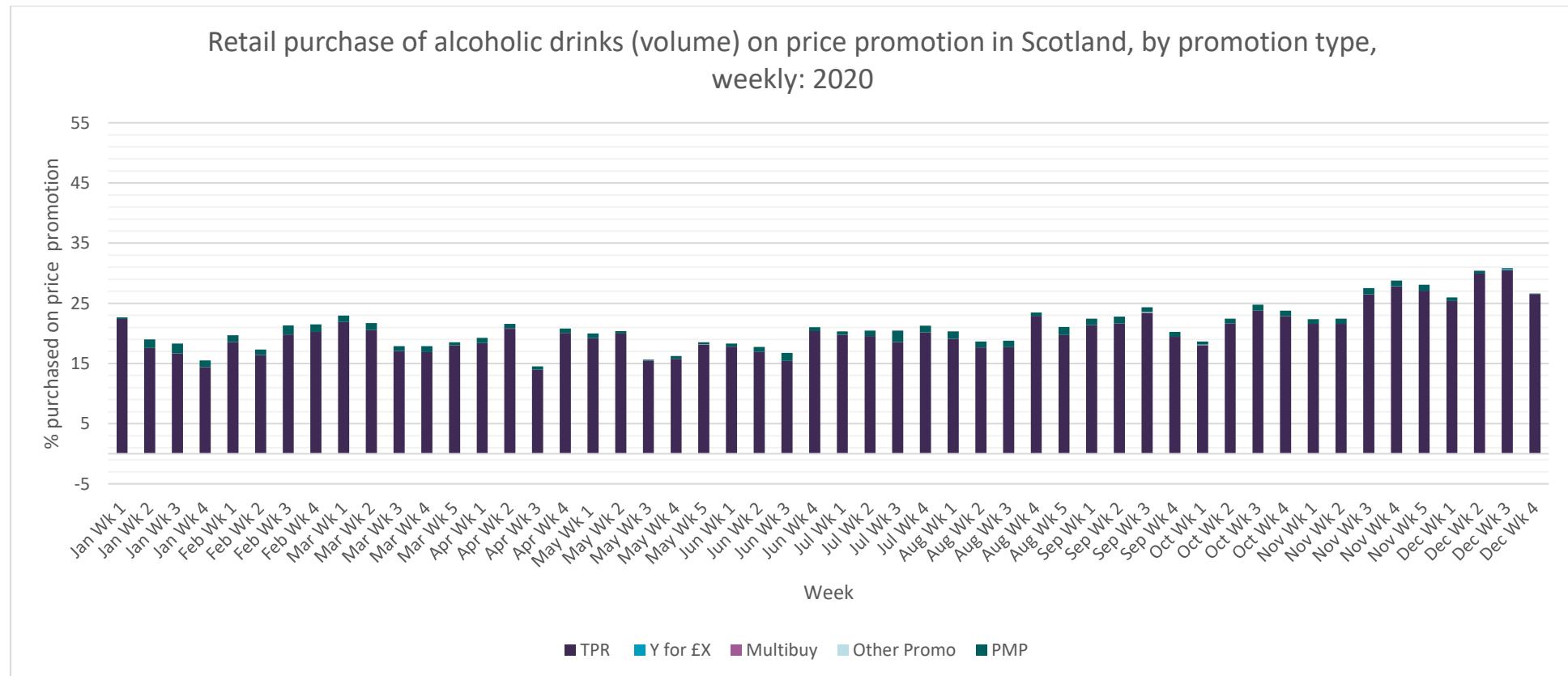


Figure 16 Retail purchase of alcoholic drinks (volume) on price promotion in Scotland, by promotion type, weekly: 2020



3.9 Fruit

The data shows a higher volume of fruit was purchased in almost every week in 2020, compared with 2019, except some weeks in early 2020 and in August week 5.

In 2020, 25.8% of fruit purchased into the home in Scotland was on price promotion, compared with 26.5% in 2019. The data shows TPRs accounted for the greatest proportion of fruit purchased on price promotion (10.2% -26.5% of volume) followed by 'Y for £X' offers (0.3% - 7.5% of volume).

Figure 17 Retail purchase of fruit (volume) in Scotland, weekly: 2020 vs. 2019

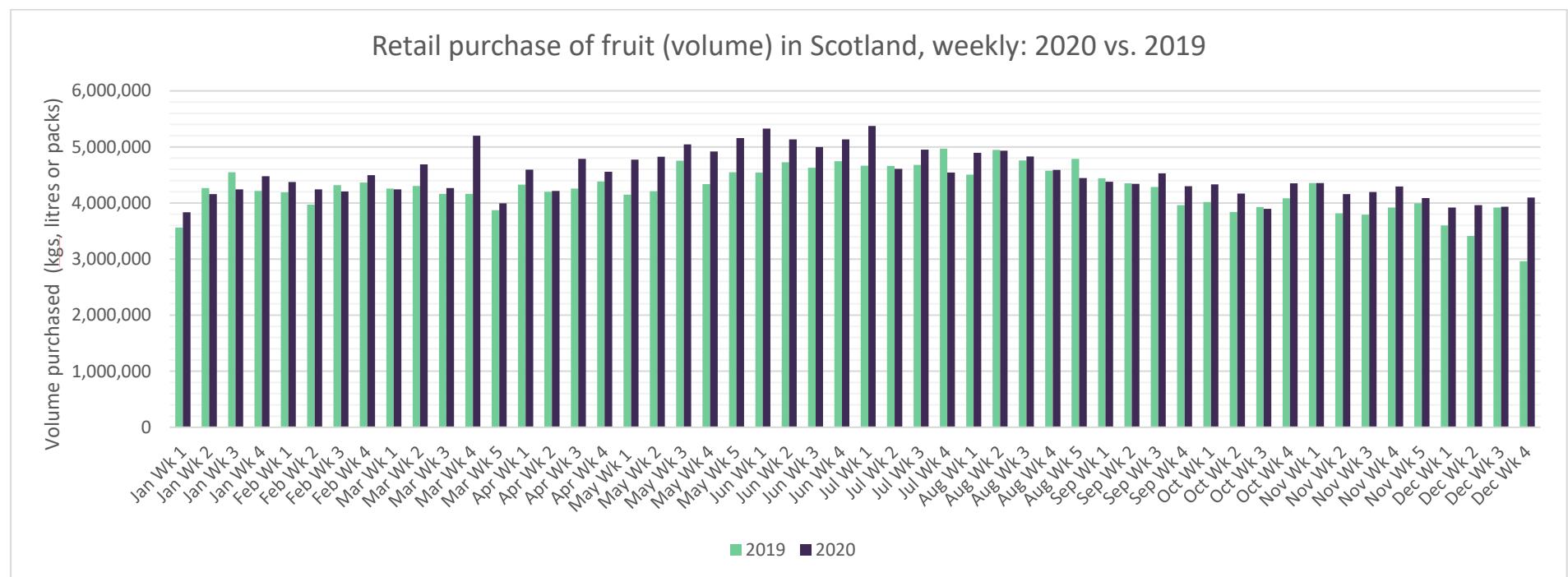
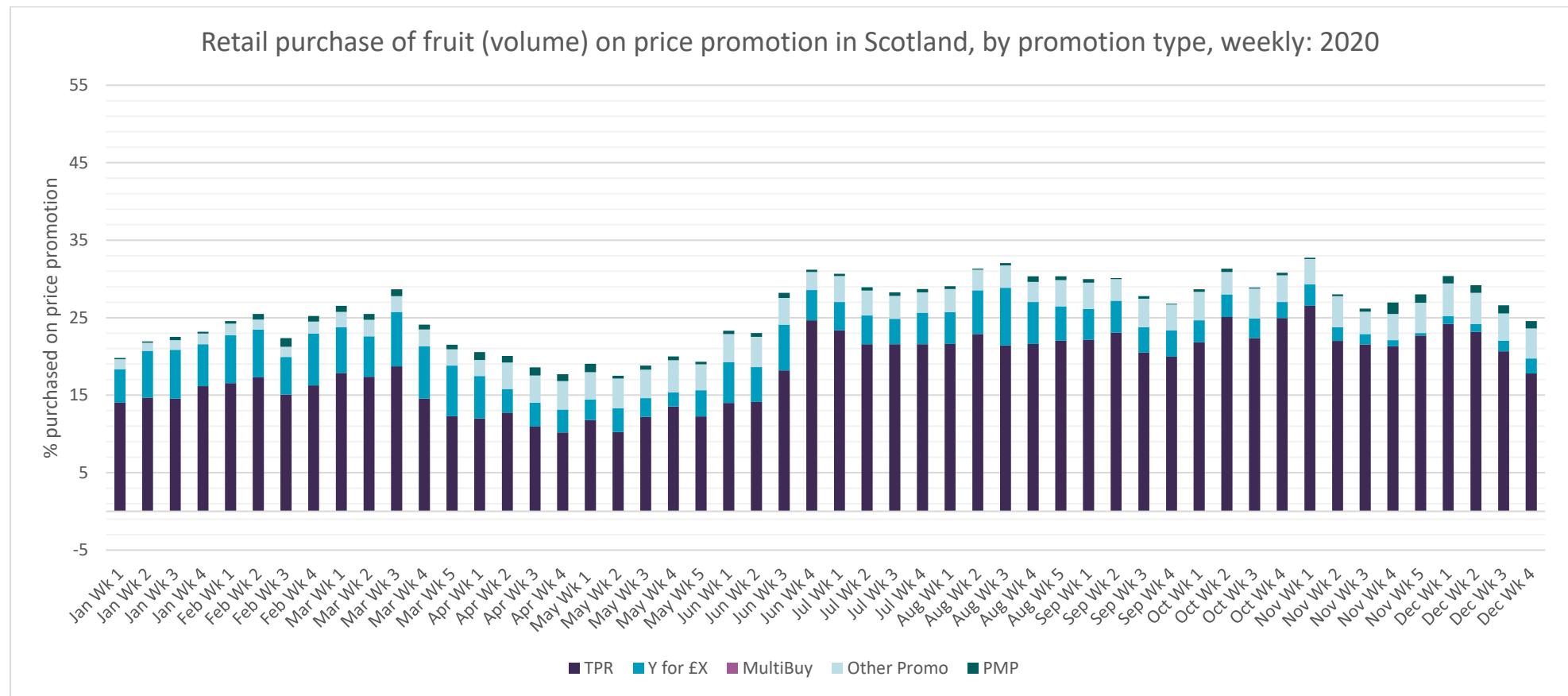


Figure 18 Retail purchase of fruit (volume) on price promotion in Scotland, by promotion type, weekly: 2020



3.10 Vegetables

The data shows a higher volume of vegetables was purchased in almost every week in 2020, compared with 2019, except for some weeks in early 2020 and December week 3. For example, in March week 4 2020 purchase of vegetables was 54.8% higher than the same week in 2019. This largely remained higher for the rest of the year, except from some weeks in April, July and December.

In 2020, 28.9% of vegetables purchased into the home in Scotland on price promotion, compared with 24.5% in 2019. The data shows that purchase on total price promotion peaked at 51.2% of volume in week 4 of December. As with other categories, TPRs accounted for the greatest share of purchase on price promotion within vegetables (15.9% - 44.5%), followed by 'Y for £X' offers (2.7% - 5.9% of volume).

Figure 19 Retail purchase of vegetables (volume) in Scotland, weekly: 2020 vs. 2019

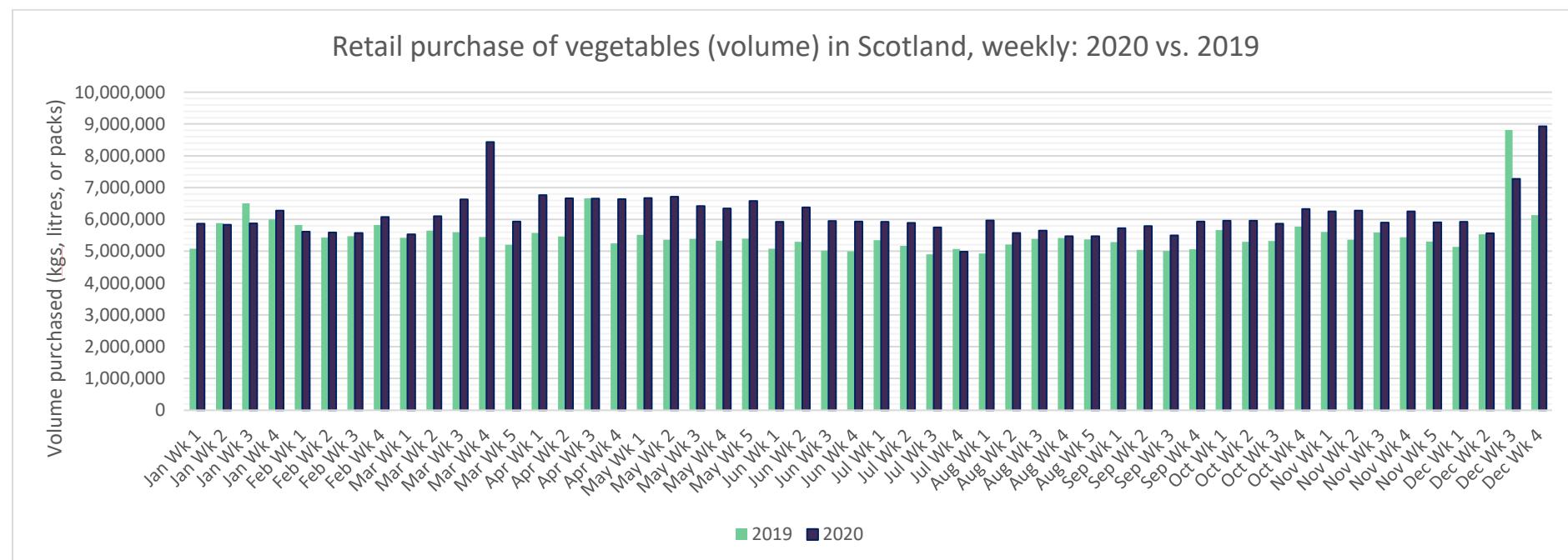
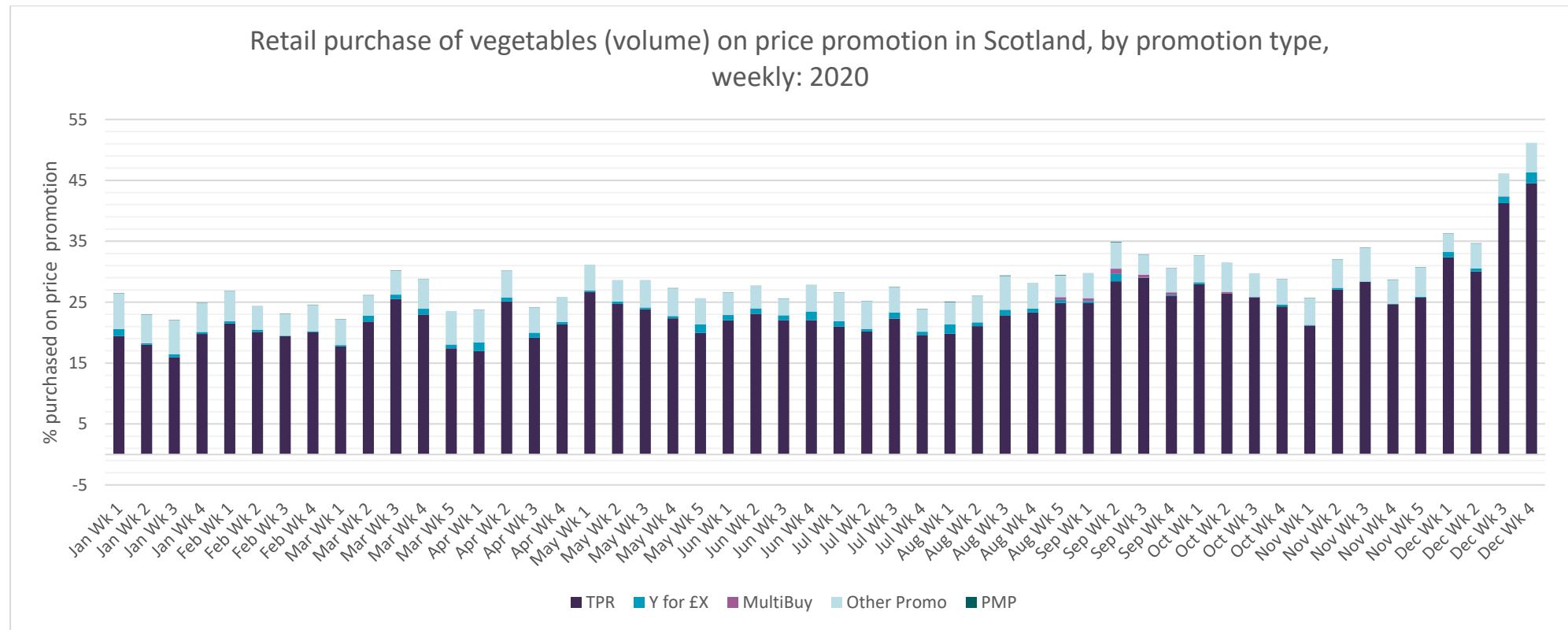


Figure 20 Retail purchase of vegetables (volume) on price promotion in Scotland, by promotion type, weekly: 2020



3.11 Canned goods

The data shows that from the end of February, take home purchase of canned goods was generally higher in 2020 compared with 2019, with the exception of a few weeks in August. This peaked in week 4 of March when purchase was 115.4% greater than the same week in 2019. This is substantially greater than the increase in purchase of total food and drink (8.2%).

In 2020, 29.1% of canned goods purchased into the home in Scotland was purchased on price promotion, compared with 32.1% in 2019. The shows that purchase of canned goods on price promotion in 2020 was predominantly through TPR offers (9.6% - 31.1% of volume) and 'Y for £X' deals (7.4% -17.3% of volume).

Figure 21 Retail purchase of canned goods (volume) in Scotland, weekly: 2020 vs. 2019

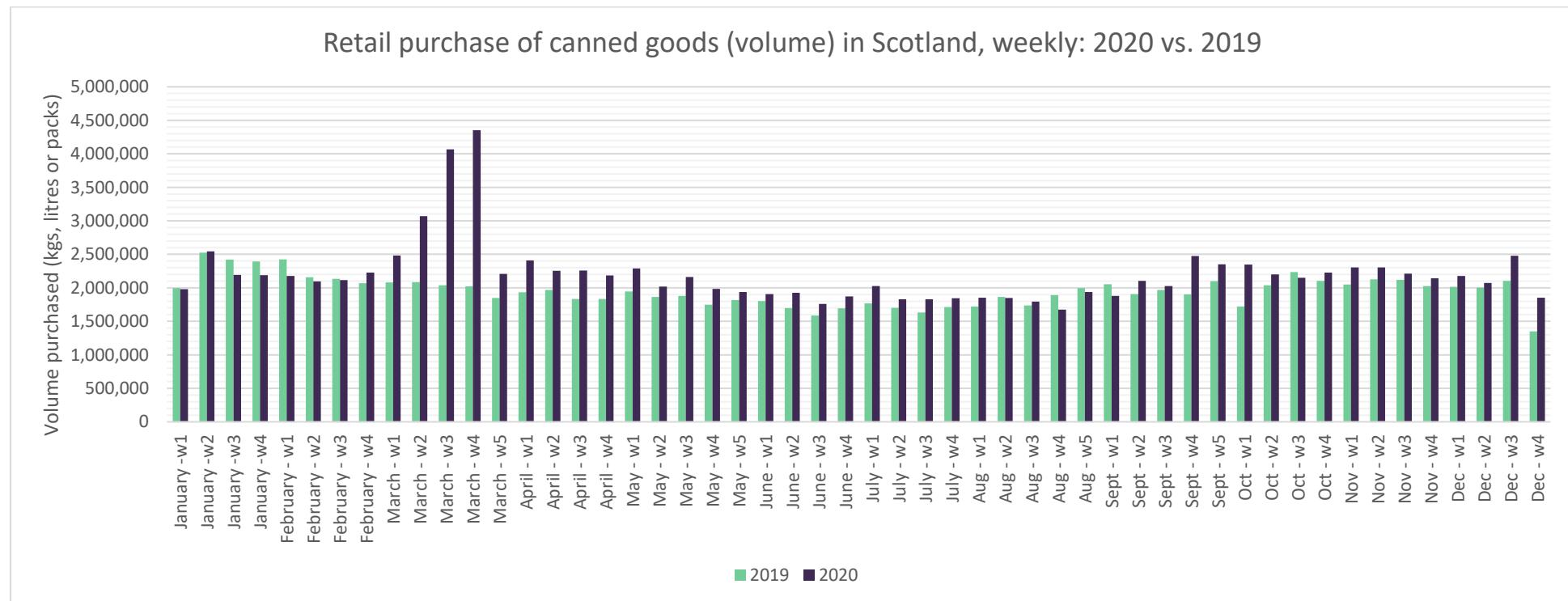
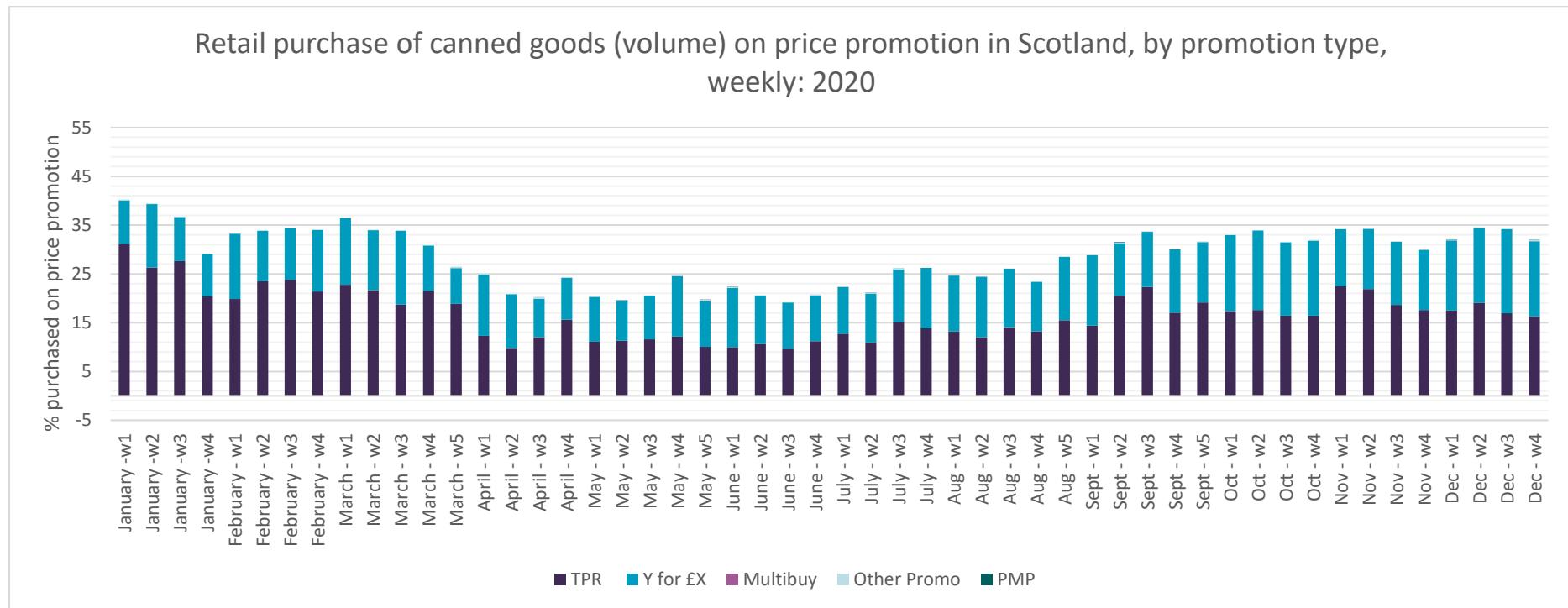


Figure 22 Retail purchase of canned goods (volume) on price promotion in Scotland, by promotion type, weekly: 2020



3.12 Ambient carbohydrates and snacks

The data shows a spike in take home purchase of ambient carbohydrates and snacks in March 2020, compared to 2019, peaking in week 3. Take home purchase generally remained greater for the remainder of 2020, compared to 2019.

In 2020, 25.3% of ambient carbohydrates and snacks and snacks purchased into the home in Scotland were on price promotion, compared with 24.1% in 2019. TPRs accounted for the greatest share of purchase on price promotion, ranging from 10.6% of volume in week 1 of June to 36.5% of volume in week 2 of October.

Figure 23 Retail purchase of ambient carbohydrates and snacks (volume) in Scotland, weekly: 2020 vs. 2019

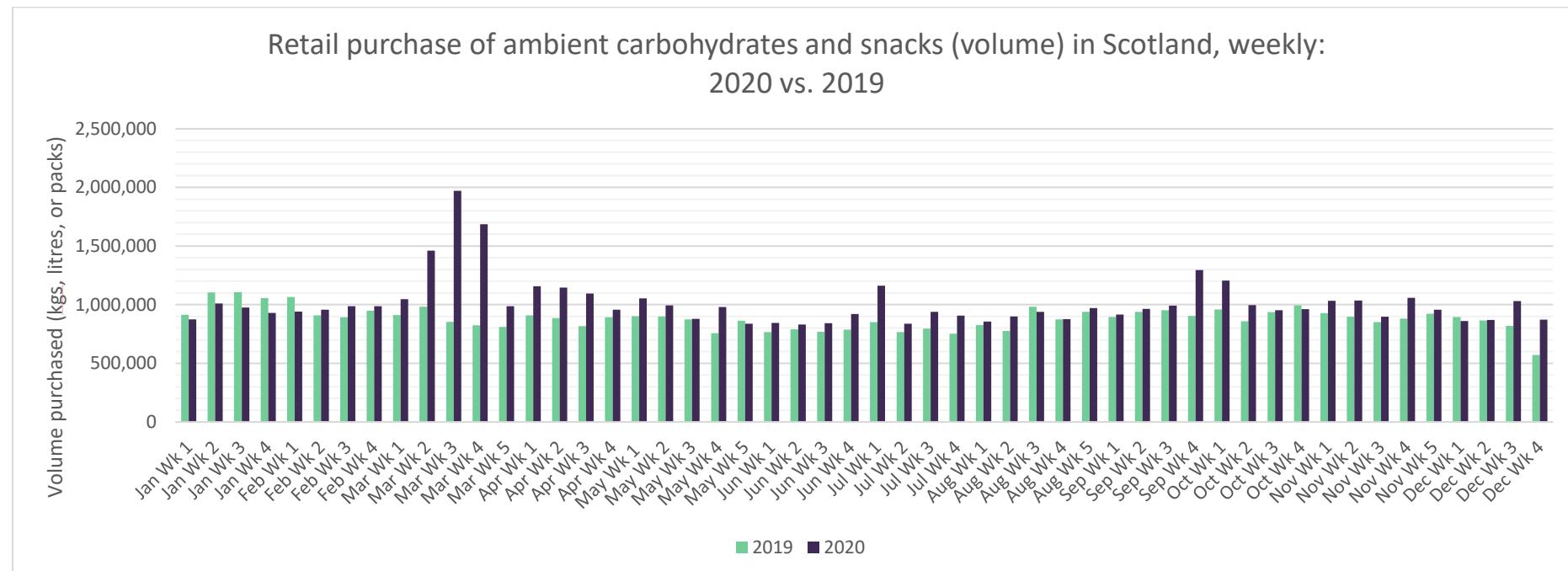
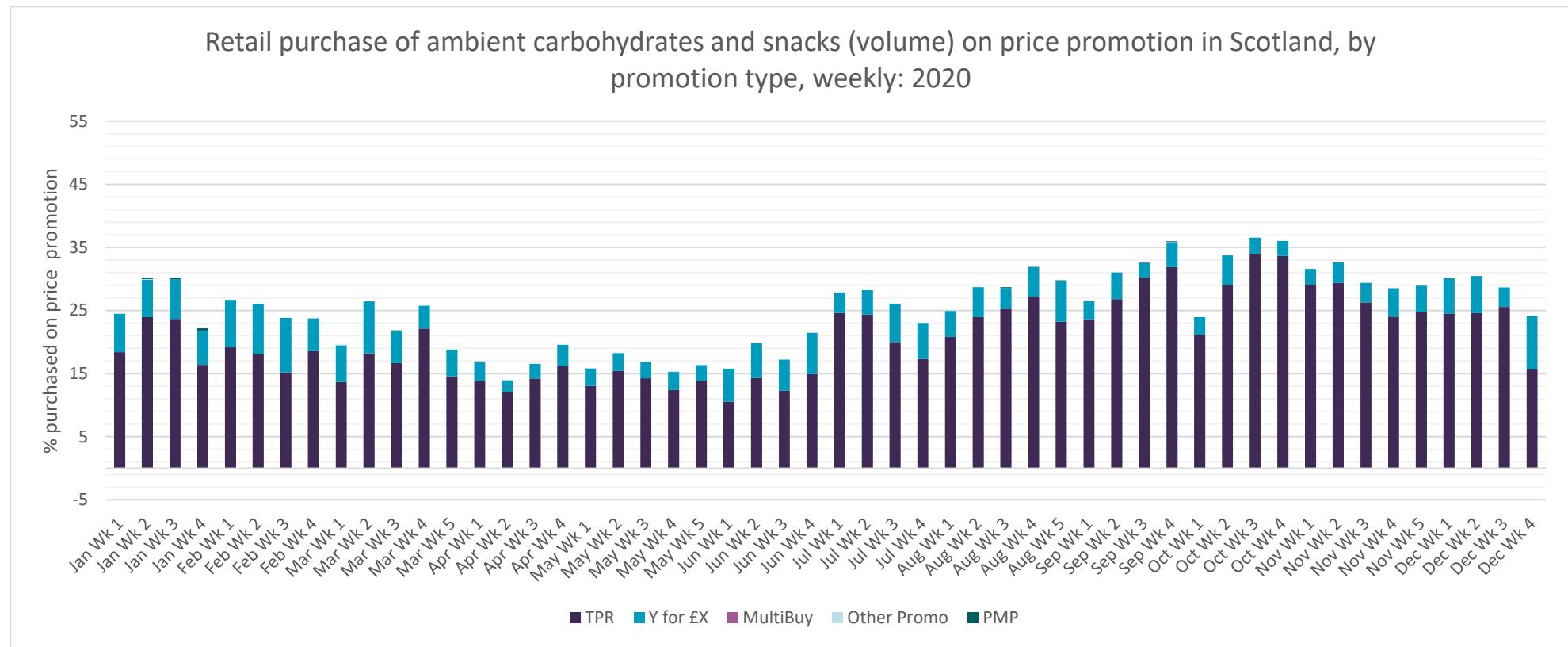


Figure 24 Retail purchase of ambient carbohydrates and snacks (volume) on price promotion in Scotland, by promotion type, weekly: 2020



3.13 Total bread

From early February onwards, there was generally a greater volume of bread purchased each week in 2020 compared to 2019 peaking at 35.7% in March week 4. The only exceptions to this were, August week 2 and October week 1 where purchase was similar to 2019 levels.

In 2020, 14.4% of total bread purchased into the home in Scotland was purchased on price promotion, compared with 12.4% in 2019. Total bread had the lowest purchase on price promotion of all the categories included in this report. The data highlights the low purchase on price promotion of bread, from as low as 7.8% of volume in December week 4 to 24.7% of volume in August week 3. 'Y for £X' offers represented between 0.1% and 4.0% of volume.

Figure 25 Retail purchase of total bread (volume) in Scotland: weekly, 2020 vs. 2019

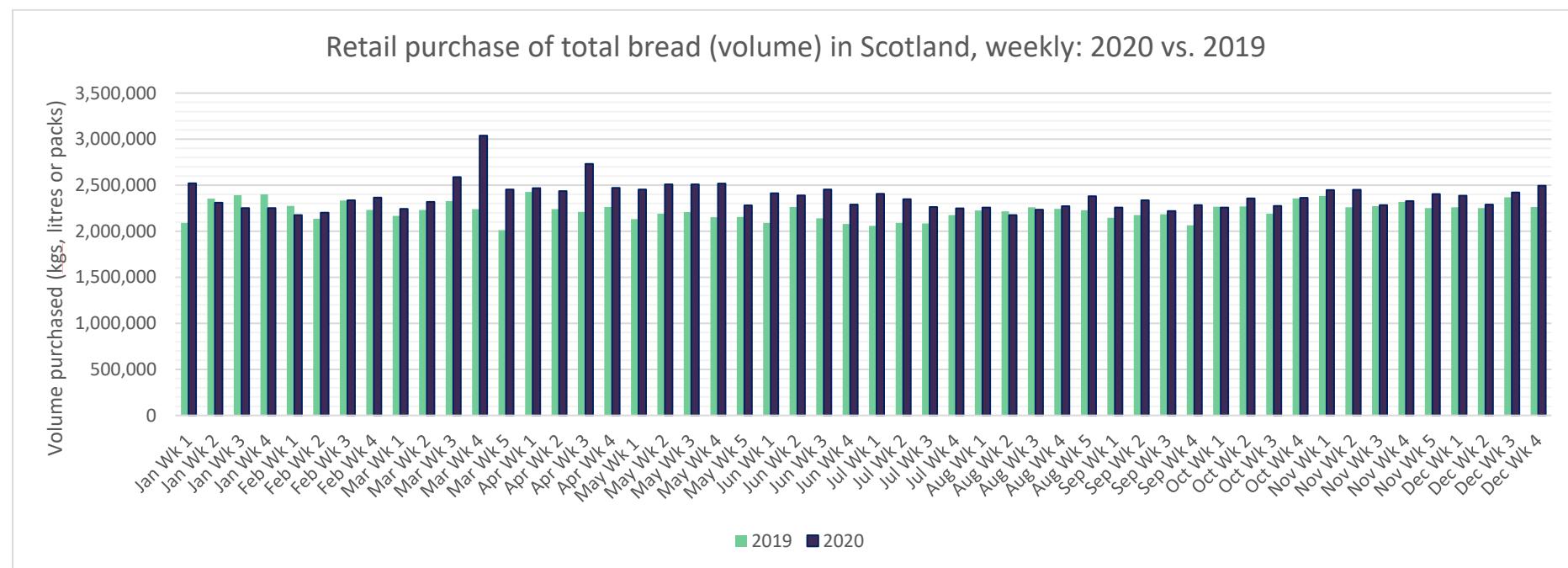
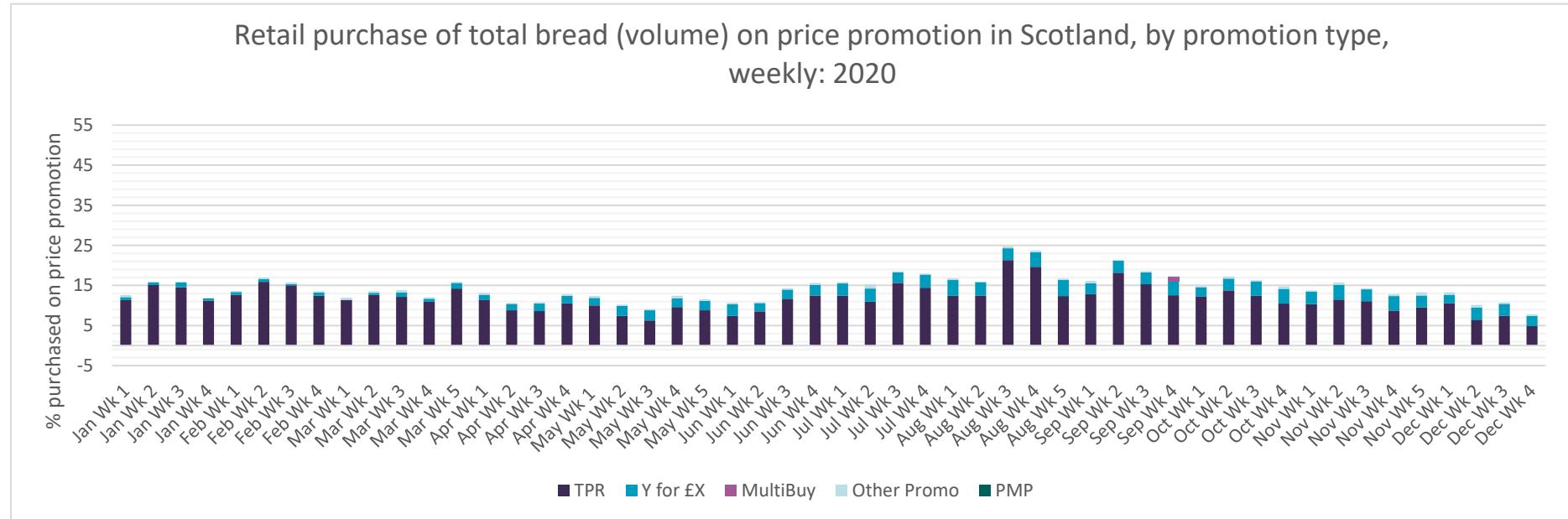


Figure 26 Retail purchase of total bread (volume) on price promotion in Scotland, by promotion type, weekly: 2020



3.14 Sweet home cooking

The data shows a consistently higher volume of sweet home cooking purchased from February week 2 onwards in 2020, compared with 2019, with the exception with December week 2. This peaked in March week 4 (90.1%) and remained higher for the remainder of 2020, except some weeks in September, November and December.

In 2020, 15.9% of sweet home cooking purchased into the home in Scotland on price promotion, compared with 16.8% in 2019. Purchase of sweet home cooking on total price promotion varied from week to week in 2020, ranging from a high of 24.7% of volume in December week 4 to a low of 7.9% in May week 5. TPR's accounted for 4.2% - 19.5% of volumes purchased in 2020, with 'Y fo £X' accounting for 2.4% - 12.4%.

Figure 27 Retail purchase of sweet home cooking (volume) in Scotland, weekly: 2020 vs. 2019

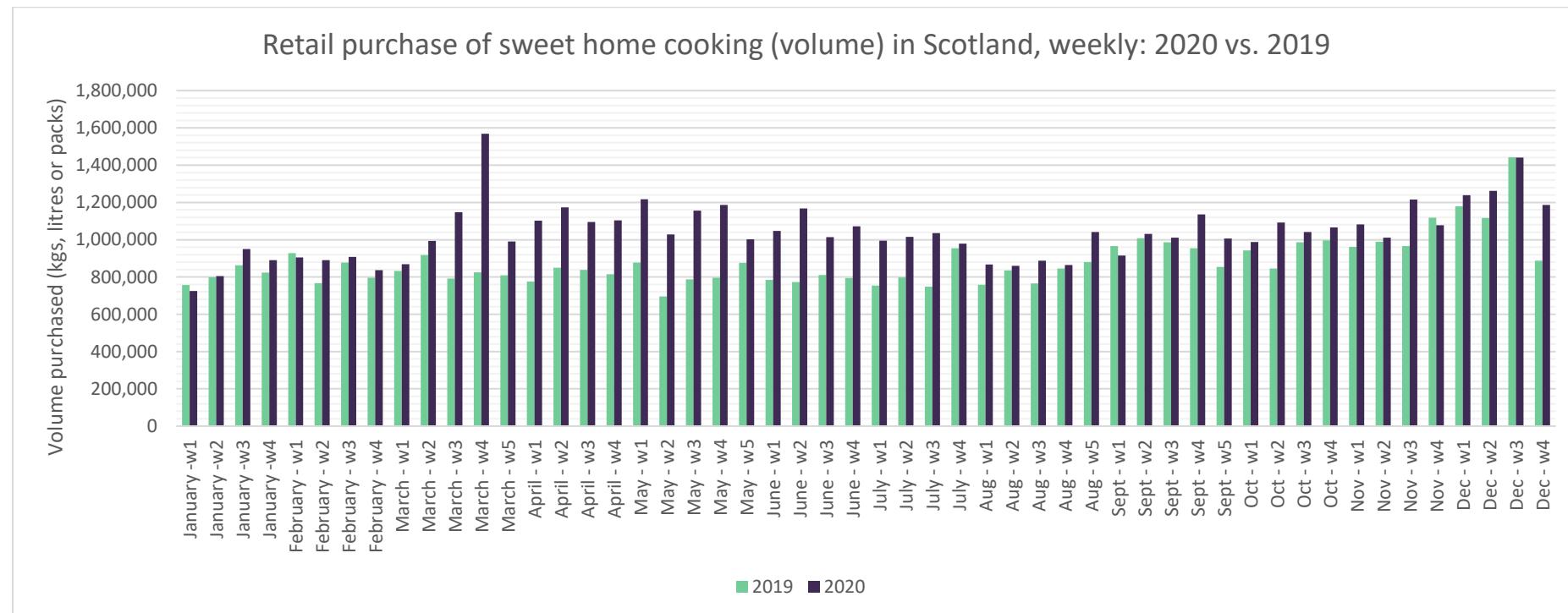
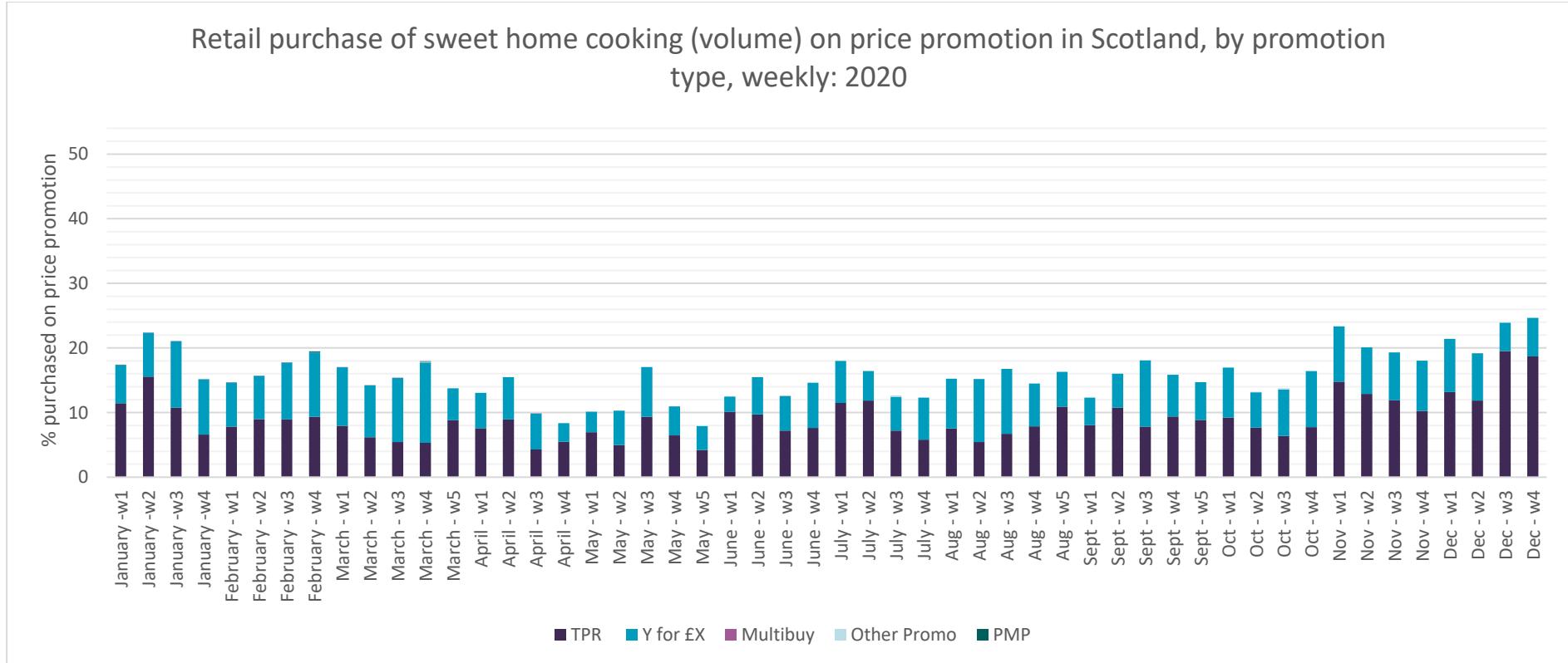


Figure 28 Retail purchase of sweet home cooking (volume) on price promotion in Scotland, by promotion type, weekly: 2020



3.15 Savoury home cooking

The data shows a higher volume of savoury home cooking was purchased from February week 4 onwards in 2020, compared with 2019, with the exception of August week 4 and December week 3. At certain points in the year, particularly between the months of March-August, the volume purchased tended to be greater than the percentage increase for total food and drink (8.2%).

In 2020, 24.5% of savoury home cooking purchased into the home in Scotland was purchased on price promotion, compared with 30.4% in 2019. The data shows that 'Y for £X' offers accounted for a smaller share of volume purchased, with the majority of savoury home cooking purchased on price promotion being a TPR offer. TPRs represented between 11.4% and 32.0% of savoury home cooking purchase in 2020.

Figure 29 Retail purchase of savoury home cooking (volume) in Scotland: weekly: 2020 vs. 2019

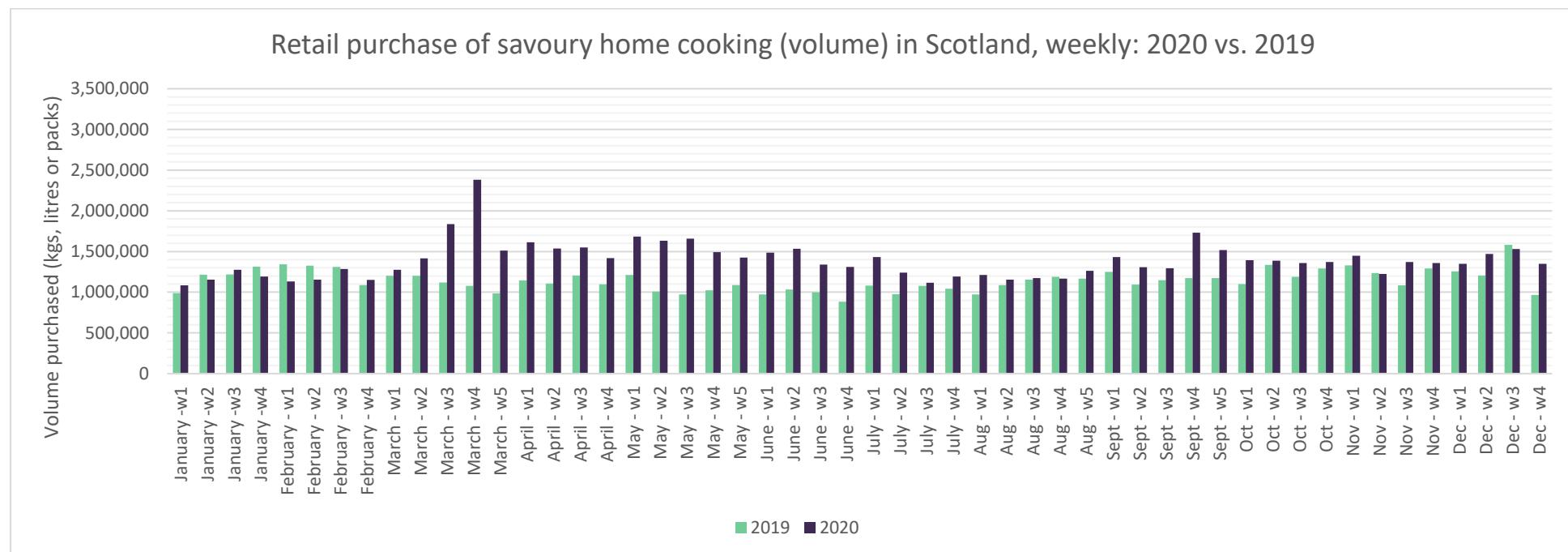
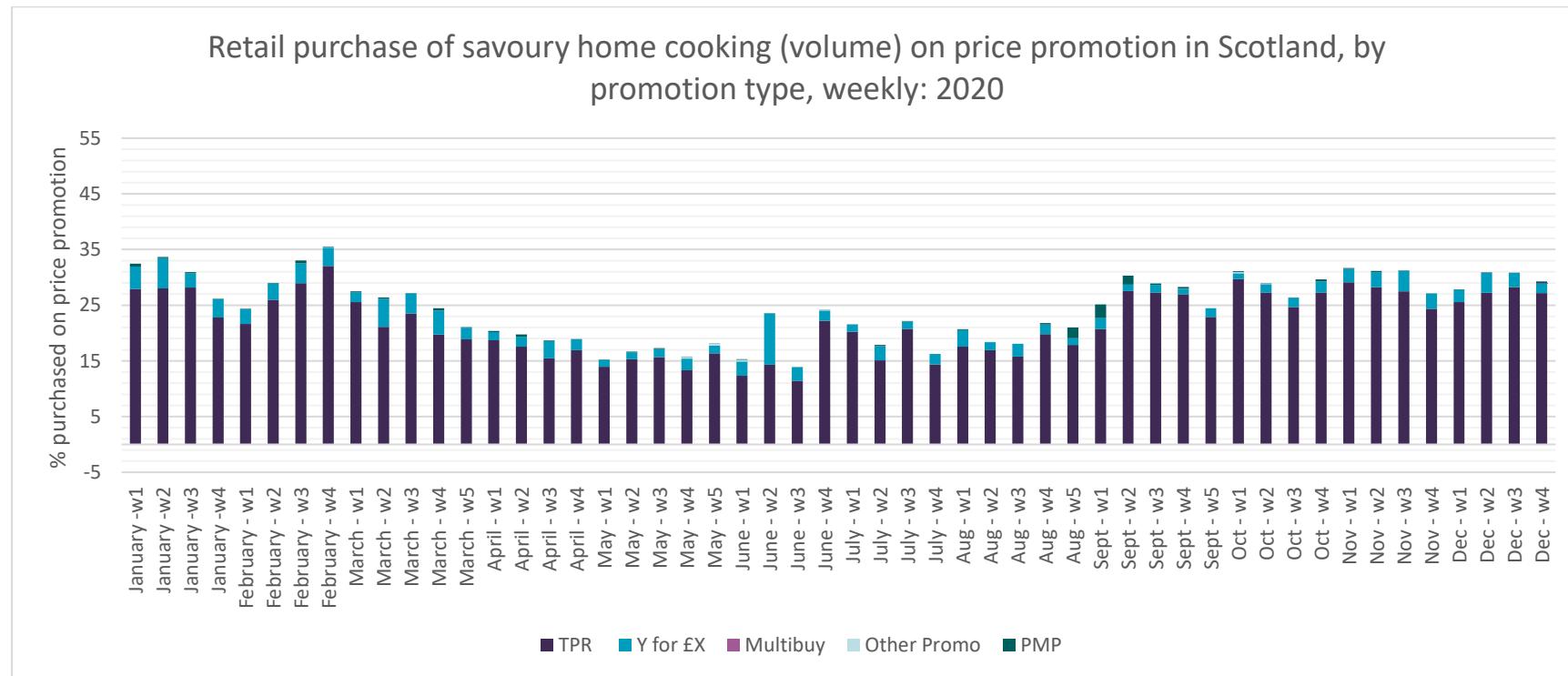


Figure 30 Retail purchase of savoury home cooking (volume) on price promotion in Scotland, by promotion type, weekly: 2020



3.16 Total meat

The data shows a higher volume of total meat was purchased from February week 4 onwards in 2020, compared with 2019, with the exception of a few weeks in August. This increase in purchase compared to 2019 peaked at 84.6% in March week 4, and remained higher for the remainder of 2020, except some weeks in August and September.

In 2020, 30.6% of total meat purchased into the home in Scotland was purchased on price promotion, compared with 33.9% in 2019. The data shows a mix of TPR, 'Y for £X' and 'other' promotions throughout 2020. TPRs represented between 10.5% - 23.2% of the volume of total meat purchase, 'Y for £X' represented 7.0% - 12.4% and 'other promotions' accounted for 3.2% - 6.7%.

Figure 31 Retail purchase of total meat (volume) in Scotland, weekly: 2020 vs. 2019

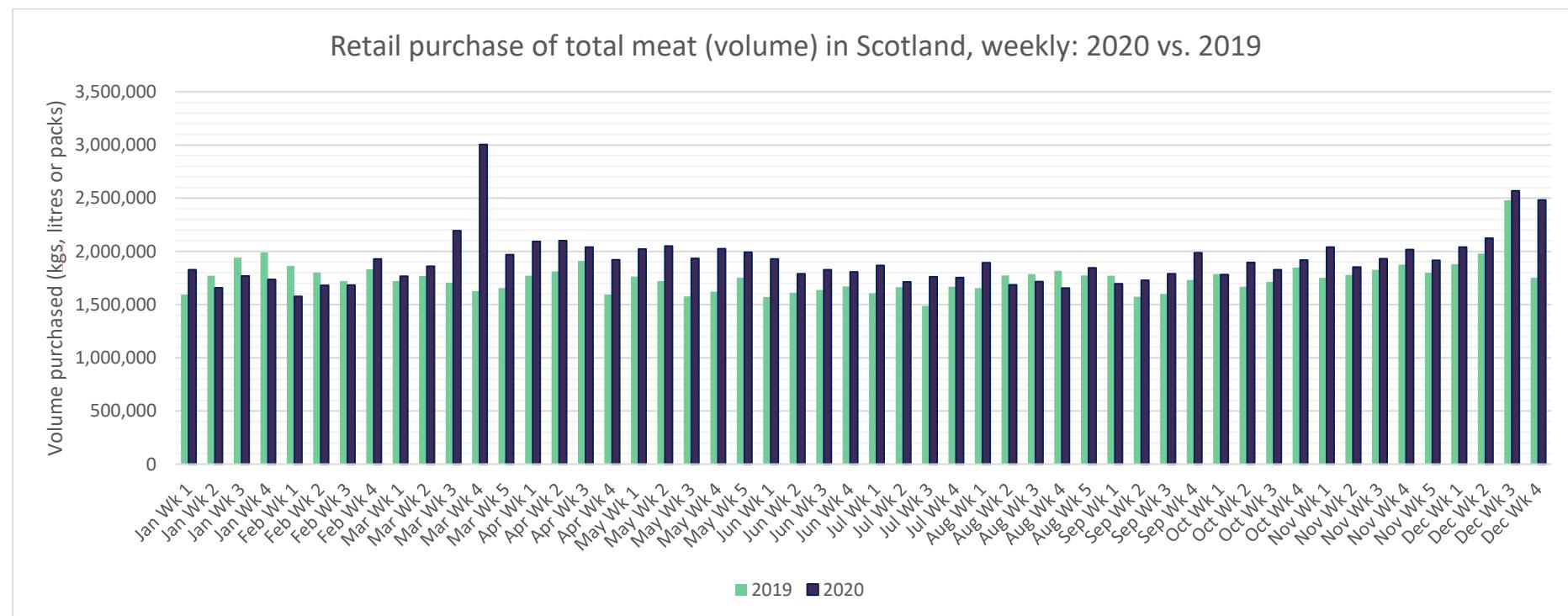
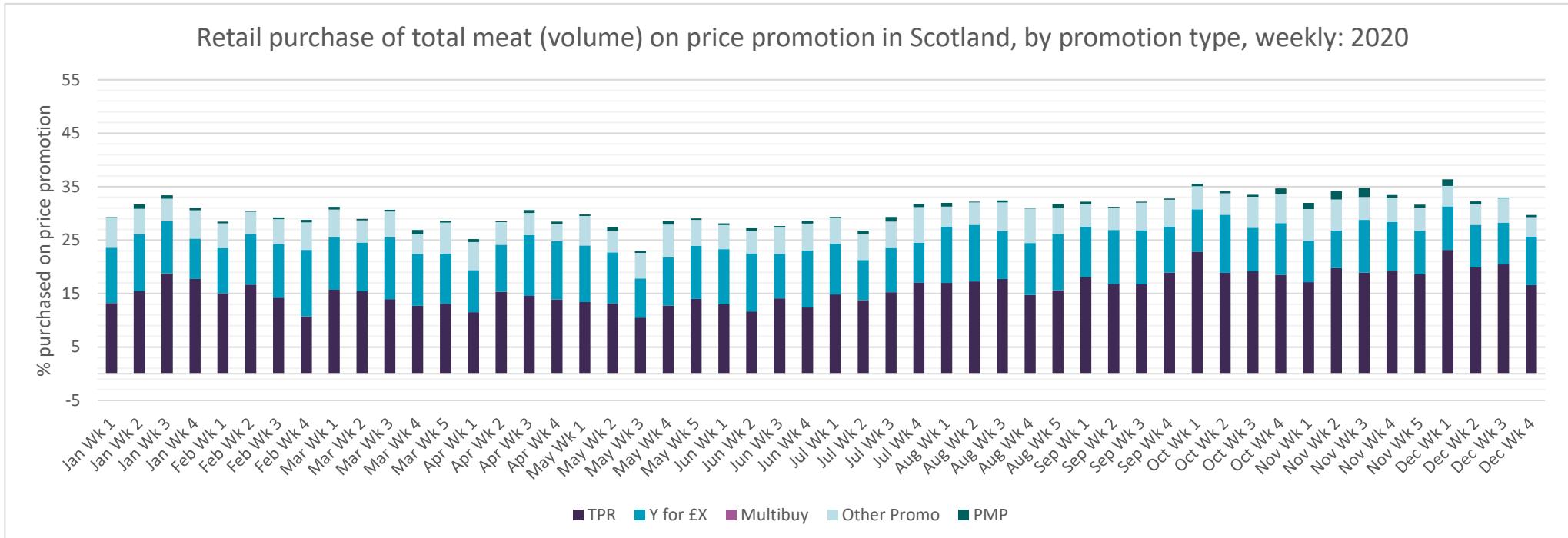


Figure 32 Retail purchase of total meat (volume) on price promotion in Scotland, by promotion type, weekly: 2020



3.17 Total fish

The data shows a higher volume of total fish was purchased from February week 4 onwards in 2020, compared with 2019, with the exception of March week 5, April weeks 2, 3 and 4 and August week 2. In March 2020, this increase peaked at 67.0% in week 4.

In 2020, 31% of total fish purchased into the home in Scotland was purchased on price promotion, compared with 33.4% in 2019. The data shows TPRs and 'Y for £X' offers were the dominant price promotion types for total fish in 2020, accounting for 10.1% - 26.6% and 5.2% - 16.2% of volumes purchased respectively.

Figure 33 Retail purchase of total fish (volume) in Scotland, weekly: 2020 vs. 2019

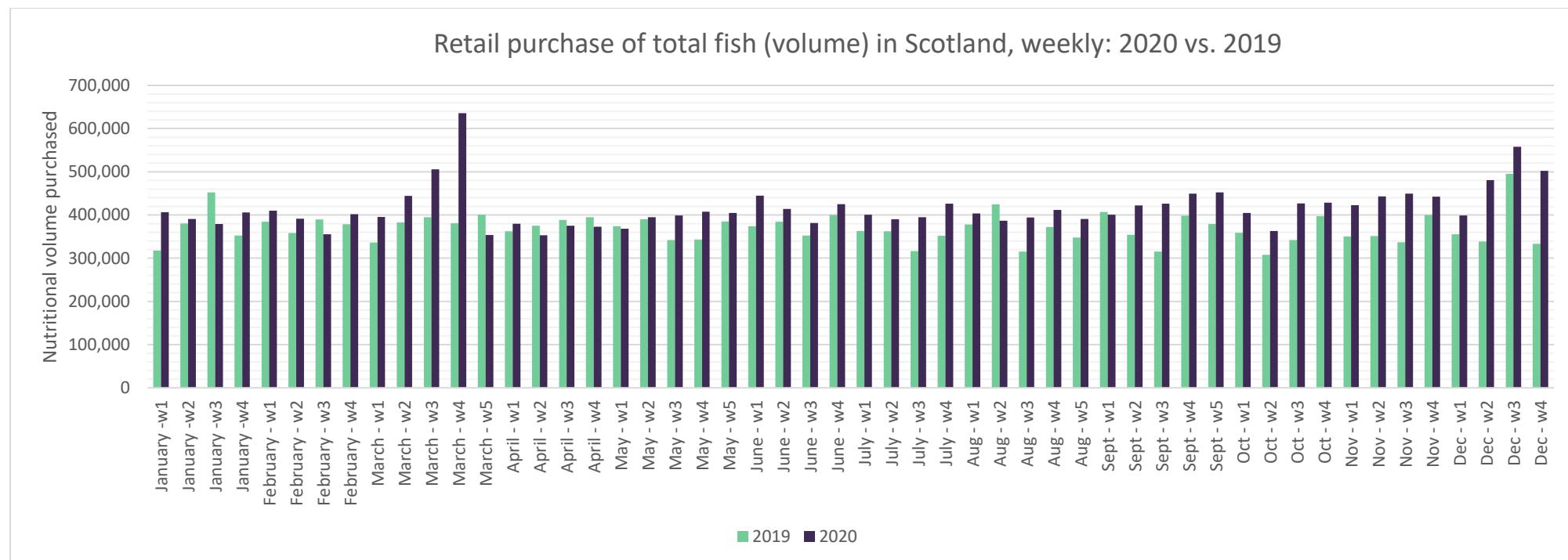
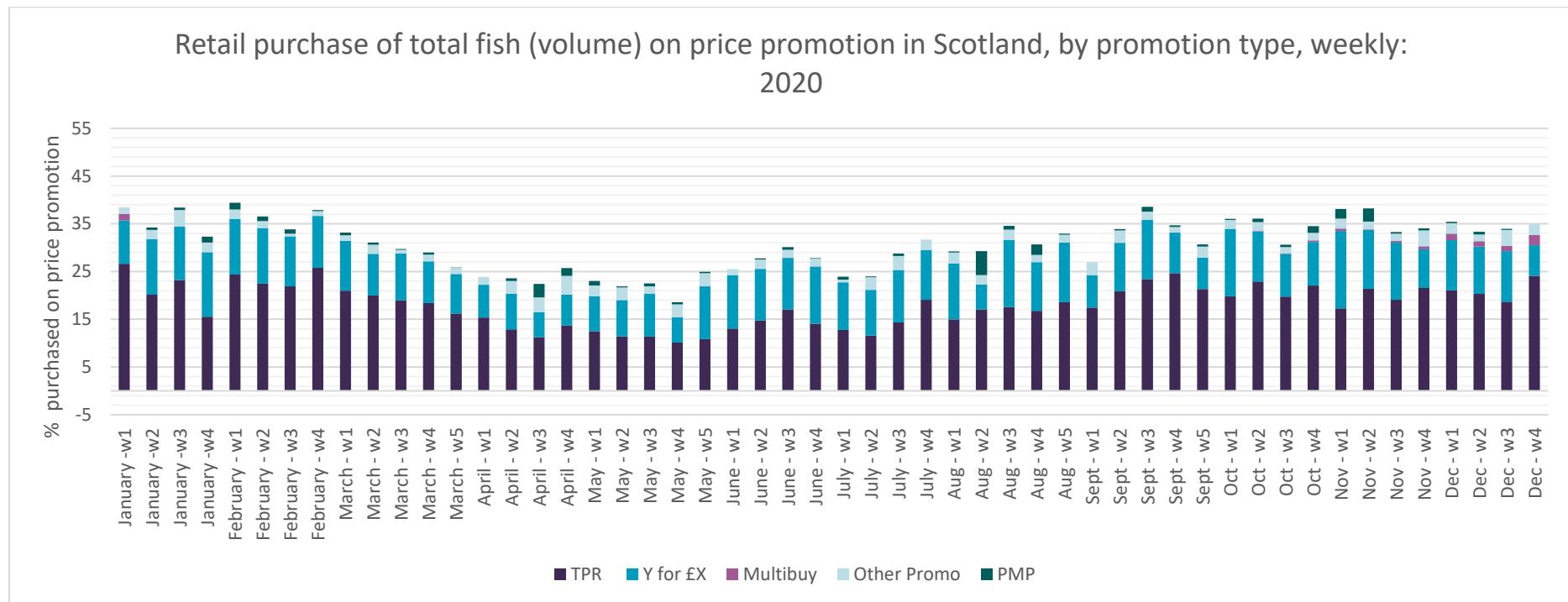


Figure 34 Retail purchase of total fish (volume) on price promotion in Scotland, by promotion type, weekly: 2020



4. Conclusion

This report highlights an increase in the overall volume of total food and drink purchased into the home from retail in Scotland during 2020, compared to 2019. The greatest increase was observed during week 4 of March when the COVID-19 pandemic was building up to the first national lockdown being announced the following week, and then again during week 4 of December as restrictions on socialising over the festive period were introduced.

The volume of many individual food and drink categories purchased into the home during 2020 increased at a level beyond the increase in total food and drink purchase (8.2%). The food and drink categories in which the greatest increases in purchase were observed tended to be items store cupboard items which tend to have long shelf lives or items which are associated with enjoyment or pastimes such as baking ingredients, including alcoholic drinks, sweet home cooking, crisps and savoury snacks, canned goods, vegetables, and confectionery.

There was also an overall decline in the purchase of food and drink on price promotion in 2020 compared to 2019. Despite this, purchase on price promotion continues to be skewed towards less healthy categories, with discretionary food and drink purchased on price promotion at greater levels than non-discretionary foods. The data also shows that TPR accounted for the majority of the food and drink categories that were purchased into the home on a price promotion, in 2020, which is in line with our previous monitoring.

It is important to note that the trends presented in this report does not necessarily mean more food and drink has been purchased overall. The data within this report does not take into account any declines observed in food and drink purchased from the out of home environment as a result of COVID-19 restrictions on this sector throughout 2020. As a result of these restrictions, more people spent more time eating and drinking within the home, compared to previous years when eating out was more frequent. FSS data indicates a reduction of 36% in the market value of the out of home sector in 2020 compared to 2019. However, as a proportion of the out of home sector takeaways specifically grew by 31% between 2019 and 2020. In addition, analysis conducted by the Institute of Fiscal Studies suggests that total calories purchased in 2020 from both retail and out of home was 10% higher than in 2019.²

The data presented within this report provides an overview of the impact that the COVID-19 pandemic has had on retail purchasing patterns in Scotland, during 2020. This report complements and adds to the evidence base which supports action to limit the availability, advertising and price promotion of high fat/salt/sugar products. It also provides an important baseline to continue

² [The dietary impact of the COVID-19 pandemic - Institute For Fiscal Studies - IFS](#)

monitoring the impact of COVID-19 on our retail purchasing patterns in Scotland, to understand to what extent our retail purchase returns to pre-pandemic levels.