



December 2017

European Retail Rankings - Europe

The European Retail Rankings focuses on the leading retailers in Europe and puts them in perspective. This is a report where the numbers are all important, though we also give some background information both by sector and by country. We provide a three-year record of the main statistics (in so ...

Supermarkets - France

“The French grocery sector is undergoing profound structural change. Larger stores are struggling to maintain sales, particularly in non-foods, and smaller, more local and specialised stores are growing. Buying food online is increasingly popular, both at established grocery retailers and at non-specialists, such as Amazon. The provision of home delivery ...

Supermarkets - Germany

“The introduction of Amazon Fresh in May 2017 has been a shot in the arm for online grocery retailing in Germany with a number of the leading supermarkets launching or expanding their e-commerce offering. As availability of grocery e-commerce improves, German consumers will quickly adapt to a new way of ...

Supermarkets - Spain

“The continued growth in the urban population and increasing frequency of grocery shopping, as well as a rise in single-person households, is changing the role of grocery stores in Spain. The hypermarket store format has become less popular and grocery retailers have been expanding their convenience store formats and focusing ...

Supermarkets - Italy

“The Italian economy is showing signs of recovery and this is reflected in the improved performances reported by many of the top grocery retailers. The major players in the sector have also been increasing investment in improving their offer, both in-store and online. However, Italian consumers are still very price-conscious ...

Supermarkets - Europe

“The days when food retailing was a major growth sector have come to a very sudden end. Food retailers have to cope with the problems of maturity and a shift in demand from large stores to small ones. The challenges are enormous. This is the biggest change in food retailing ...

October 2017

Clothing Retailing - Italy

“The Italian clothing sector is highly fragmented. But fashion is in the blood of Italians and spending on clothing has remained robust. Things are changing quickly – online and the fast fashion retailers are revolutionising how people shop. With the world at their fingertips, shoppers are increasingly choosy and retailers ...

Clothing Retailing - France

“French clothing specialists are under pressure and the sector is undergoing significant structural change. Flat or falling spending has been compounded by the arrival

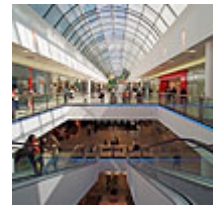
Clothing Retailing - Spain

“While clothing specialists continue to dominate the Spanish fashion market, consumers are becoming increasingly confident shopping online and some of the main players in the market are facing growing competition from pureplays, such as Amazon, Zalando and ASOS, which are expanding their product offering in Spain.”

– Tamara Sender ...

Clothing Retailing - Germany

“Clothing retailing in Germany is changing and that is seen most clearly in the poor performance of so many of the longest established retailers. A more fashion-



of new international players, the rise of e-commerce, a keen focus on price and the arrival of new generations with different consumption habits. More and more ...

demanding consumer is not finding what they want in the likes of C&A and looking instead to younger-oriented retailers, such as H&M and Zara ...

Clothing Retailing - Europe

“Clothing retailing is changing. Consumers are becoming more demanding and too many well established retailers have failed to respond adequately. New dynamic retailers are developing to take their place – some online only, but others combining online and stores. Clothing retailers of the future will have to be much more ...

September 2017

European Retail Handbook - Europe

This is the 21st edition of the European Retail Handbook. In it we provide the essential background information to understanding the retail scene in each European country.

August 2017

Luxury Goods Retail - International

"Growth in the global luxury goods market accelerated in 2016. Whilst the market continues to face a significant amount of uncertainty, consumer confidence remains high, the number of High Net Worth Individuals (HNWIs) continues to grow and the economy in a number of the key luxury markets is recovering. As ...

July 2017

Online Retailing - Spain

“Online retailing is growing fast from the unpromising beginnings of a country where there was little tradition of home shopping. Everything is in place for rapid growth. All the leading retailers have an online offer and 84% of internet users shop online.”

– **Richard Perks, Director of Retail Research**

Online Retailing - Italy

“Online retailing in Italy has been slow to develop, but is now entering a growth phase as connectivity improves, more of the population becomes accustomed to shopping online and as major international pureplayers, such as Amazon, are investing in the country. We expect online sales to grow to account for ...



Online Retailing - Germany

“Online retailing is highly developed in Germany but online sales account for just 10% of all retail sales, partly because online grocery retailing remains underdeveloped. But recent investment and innovation made food the fastest growing online product category in 2016. If German grocery shopping habits are going to change, it ...

Online Retailing - Europe

“Online retailing has only played a role in the retail sector for about 15 years and rather less than that in many countries. Retailers, whether store-based or online pureplayers, are still feeling their way in many respects. It is becoming clear that online retailers cannot compete on price, they need ...

May 2017

DIY Retailing - France

“The French DIY sector has been resilient recently, with spending buoyed by a stable housing market and an increase in the number of homeowners. Specialists have maintained their share of the market, but the sector is concentrated. The two leading chains, Leroy Merlin and Castorama generate 40% of sector sales ...

DIY Retailing - Germany

“Consumer spending on DIY has remained strong over the past few years, but the specialists have struggled to maintain their share as the non-specialists, and particularly the online giants Amazon and eBay, are catering to consumers looking for items that don’t justify a trip to a warehouse store”.

– Thomas ...

DIY Retailing - Europe

“DIY is changing. An ageing population is bringing a shift away from DIY to Do it for me. That is a fact of life for the retailers. As the consumer research for this report shows, younger people are keen to do DIY, the trouble is that there are fewer of ...

Online Retailing - France

“Online retailing in France is maturing and concentrating. As Amazon extends its reach and builds market share, domestic retailers have been looking for new ways to remain competitive and there has been some merger and acquisition activity, which is leading to a process of concentration. With the Drive click-and-collect format ...

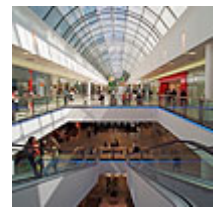
DIY Retailing - Spain

“Consumer spending on DIY in Spain has bounced back in line with the country’s economic recovery, which should be a relief for those operating in the DIY sector. However, not all are benefitting equally. Larger chains are capitalising and gaining market share rapidly but smaller players continue to find trading ...

DIY Retailing - Italy

“DIY is popular with Italian respondents in our internet-based survey and they welcome the broader range and service opportunities that superstores can offer. Given the lack of underlying economic growth currently, and the anticipated underperformance of the specialists, that is where the best hope for Italian DIY retailers lies.” ...

April 2017



Footwear Retailing - Spain

“The specialist retailers are rapidly losing share of footwear spending, as the sports stores cement their position as a popular place for buying footwear. Tapping into rising spend on footwear online presents one avenue for growth, while focusing on catering for older shoppers, who are most driven by quality and ...

Footwear Retailing - Germany

“The footwear specialists dominate the market in Germany, and grew well ahead of spending on footwear in 2016. Those that have recognised the need to digitise their business have performed particularly well, however there is still much to be done by the specialists to tap into the rising demand for ...

Footwear Retailing - Europe

“There are major shifts taking place in the footwear market, as the non-specialists grow their share of spending, while the traditional out-of-town footwear format has been thrown into question. With the market becoming increasingly competitive, the footwear specialists need to find ways to differentiate themselves, whether through elevated service, standout ...

Footwear Retailing - Italy

“Italian footwear retailers have been performing well, but competition is intensifying from the expansion of the fast fashion chains and from online pureplayers. The opportunities lie in modernising footwear retailing and in selling online. The domestic retailers need to ensure they keep up in both these regards if they are ...

Footwear Retailing - France

“The French footwear specialists are in trouble. Some have been growing, but many of the established names on the high street and out-of-town are in decline. The market is oversupplied with retailers and the traditional players are struggling to give consumers reason to choose to shop there. We think there ...

March 2017

Electrical Goods Retailing - Spain

“Consumer confidence is recovering in Spain and spending on discretionary products continues to rise. However, the specialist electrical retailers are losing share of the electrical goods market. Leading specialist, Media Markt’s strong performance continues to contrast the overall trend, driven by the retailer’s continued investment in both in-store and online ...

Electrical Goods Retailing - France

“Spending on electricals in France has been in decline for the last five years, but the three largest specialist retail groups have been growing strongly. The market has been transformed by online shopping, but the store-based specialists have generally kept up with the pure-players. The market is undergoing significant structural ...

Electrical Goods Retailing - Italy

“With the vast majority of purchases taking place in-store, and given the value Italian consumers put on first-hand product experience and sales support, the electrical specialists still account for the largest share of consumer spend on electrical goods. However, our consumer research for this report identifies Amazon as the single ...

Electrical Goods Retailing - Germany

“German consumers across all ages are now completely at ease with shopping for electrical goods both online and in-store simultaneously allowing the market leader, Media-Saturn, to return to growth. The challenge for smaller specialists is finding a way to differentiate themselves in a sector where consumer spending has continued to ...



Electrical Goods Retailing - Europe

"The days when the electricals sector was seen as a boom area are long gone. White goods and most brown goods are now bought mostly on a replacement basis – there is too little product innovation to accelerate the process. Where there is development, as with curved TV screens or ...

January 2017

Beauty Retailing - Spain

"Spain is emerging from its prolonged recession and consumers are recovering their confidence. They are showing signs of trading up and are interested in the environmental credentials of beauty products. Consumer research for this report reveals a trend towards shopping at the specialists and a recovery in interest in innovative ...

Beauty Retailing - Italy

"The Italian beauty market is continuing to perform well. Despite fluctuating levels of growth in consumer spending, the leading specialists have continued to increase retail sales – strengthening their position in the market and stealing consumer spending away from the grocers and department stores. Looking ahead, the leading specialist Acqua ...

Beauty Retailing - Germany

"The internet is a critical part of beauty shopping as consumers use social media for inspiration and the latest trends. But sales online are low and stores remain irreplaceable for allowing consumers to interact with products. Recent expansion by some of the leading players means stores are now more conveniently ...

Beauty Retailing - Europe

Beauty Retailing – Europe, January 2017 provides detailed coverage of the beauty retail sectors in the five major Western European markets: the UK, France, Germany, Italy and Spain. The data in its entirety is contained in the five-country report, which gives a full overview of beauty retailing in these markets ...

Beauty Retailing - France

"Growth in spending on personal care in France has been sluggish, but the specialist retailers have been growing strongly. This is in no small part due to the dynamism of market leader Sephora, whose accessible stores and digital innovations are leading the way, but also down to the expansion of ...