

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Food retailing is changing fast. Superstores have reached the limits of growth in France and the UK, there is unsatisfied demand for online shopping in Germany, Italy and Spain. The hard discounters are making a major impact outside Germany. The old certainties no longer apply and food retailers are under pressure to adapt.”
– Richard Perks, Director of Retail Research

This report looks at the following areas:

- In the UK superstores are losing market share
- In France, the fastest growing sectors are convenience stores
- In Germany the hard discounters are retrenching, even though in many other countries, notably the UK, they are gaining market share
- In Spain there has also been a move to smaller supermarkets, but here it has been driven by a desire to save money by shopping more on an as needs basis. Mercadona has been the biggest beneficiary, but it is looking under threat from the discounters
- Online is growing, but still takes only a small share of sales, even in the most developed country, the UK.

Naturally the older formats are fighting back. Superstores are reconsidering their retail proposition. Hard discounters are gaining a new lease of life by widening their range and improving their fresh and chilled offer.

That also means that the lines between formats are becoming blurred.

But, ultimately, the key to successful food retailing in future will be the same as ever – to understand what customers really want and to be the best at delivering it. We think that the over-riding consideration is value for money, but that is a vague term covering not just quality and price, but range, service and everything else that goes into making a food retailer an attractive place to shop.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Europe – Overview

- What you need to know
- Areas covered in this report
- Technical notes
- Consumer spending
- Retail sales
- Financial definitions
- Currencies
- Abbreviations
- Sales tax rates
 - Figure 1: VAT rates, 2011-15

Executive Summary – Europe – The Market

- Sector size
 - Figure 2: Europe: Food retailers sales ex-VAT, 2010-15
- Forecast
 - Figure 3: Europe: Food retailers sales, ex-VAT, 2015-20
 - Figure 4: Europe: Food retailers sales: Compound growth rates, 2010-15, 2015-20
- Inflation – big 5 only
 - Figure 5: Major European economies: Food price inflation, 2014-15
- Leading retailers
 - Figure 6: Europe: Top 50 food retailers Sales (ex VAT), 2012/13-2014/15
 - Figure 7: Europe: Top 50 food retailers outlets, 2012/13-2014/15
 - Figure 8: Europe: Top 50 food retailers, Sales (ex VAT) per outlet, 2012/13-2014/15
- Market shares
 - Figure 9: Leading food retailers share of all European food retailers sales, 2012-14

Executive Summary – Europe – The Consumer

- How do people shop
 - Figure 10: How they shop for groceries, September 2015
 - Figure 11: Proportion of men who never or hardly ever do grocery shopping, September 2015
- A note on the research
- Main shop locations
 - Figure 12: Where they spend most on groceries and % people who spend most money there, September 2015
 - Figure 13: Proportion spending most money in a hard discounter and leading hard discounter, September 2015
- Food retailers also used
 - Figure 14: Most popular shop also used, September 2015
 - Figure 15: Hard discounters also used, September 2015

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
 EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

What we think

The UK and the decline of superstores

Elsewhere?

France

Germany

Italy

Spain

Executive Summary – Europe – Innovation and Launch Activity

Enhanced in-store experience

Figure 16: Metro/Makro Cash & Carry, in-store mobile kitchen, Belgium

Augmented reality experience

Virtual supermarket

Aldi launches music streaming service

New Italian personal supermarket shopping service

Workplace click-and-collect points

Online grocery store targeted at overseas Portuguese citizens

Ecologically attentive supermarket

App that integrates self-scanning, discounts, loyalty scheme and payment

France

Overview

What you need to know

Areas covered in this report

Executive Summary

The market

Spending and inflation

Figure 17: France: Annual % change in total household expenditure and expenditure on food, beverages and tobacco, 2011-15 (in current prices)

Channels of distribution

Figure 18: France: Estimated distribution of spending on food and beverages, 2014

Sector size and forecast

Figure 19: France: Annual % change in all retail sales (excl. fuel) and food retail sales, 2010-16

Leading players

Key metrics

Market shares

Figure 20: France: Leading grocery retailers' estimated shares of all food retailers' sales, 2014

Online

Figure 21: France: Percentage of all individuals who have bought groceries online in the last year, 2014

The consumer

Who shops for groceries

Figure 22: France: Who is responsible for grocery shopping, September 2015

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

How they shop for groceries

Figure 23: France: How they shop for groceries, September 2015

Where they shop for groceries

Figure 24: France: Where they spend most on groceries, September 2015

What we think

Issues and insights

How will online grocery retailing develop?

The facts

The implications

Adapting to a changed retail landscape

The facts

The implications

Figure 25: France: Grocery shopping habits (2015-Q2)

The market – What you need to know

Economy weak but spending picking up

Hypermarkets and supermarkets dominate but sales in decline

Subdued sector sales but improvement on the horizon

Spending and Inflation

France's economy a weak spot in the eurozone

Consumption and purchasing power regaining momentum

Spending on food and drink

Figure 26: France: Consumer spending on food, drink and tobacco (incl. VAT), 2010-15

Inflation

Figure 27: France: Harmonised indices of consumer prices, (% annual change), 2010-14

Figure 28: France: Harmonised indices of consumer prices, (% annual change), March 2014-September 2015

Channels of distribution

Grocers dominate

Specialists a vital part of French daily life

Online growing

Others very small

Figure 29: France: Estimated distribution of spending on food and drink, 2014

Sector size and forecast

Weak consumption and low inflation holding back growth

Figure 30: France: Food retailers' sales (excl. VAT), 2010-15

Figure 31: France: Food retailers' sales forecasts (excl. VAT), 2015-20

Figure 32: France: Retail sales by supermarkets and hypermarkets, 2011-14

Figure 33: France: Breakdown of sales in hypermarkets by type of product, 2009-14

Figure 34: France: Sales in supermarkets and hypermarkets by type of product, 2011-14

Leading retailers – What you need to know

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

A competitive and well populated sector

Signs of concentration

Drive dominates online

Leading retailers

2014 characterised by weak consumption and flat or falling sales

Figure 35: France: Grocery shopping habits, 2014 (Q2) and 2015 (Q2)

Winners and Losers

Hard times force cooperation and partnerships

Discounters growing strongly

New store formats

Drive dominates e-commerce in groceries

Figure 36: France: Leading grocers, sales, 2011-14

Figure 37: France: Leading grocers outlet numbers, 2011-14

Sales per outlet

Figure 38: France: Leading grocers, sales per outlet, 2012-14

Market shares

Leclerc widening the gap with Carrefour

A concentrating market

Figure 39: France: Leading grocers shares of all food retailers sales, 2011-14

Online

France at a medium stage of development

Online activity

Figure 40: France: Percentage of all individuals purchasing online in the past 12 months, 2010-14

Figure 41: France: Percentage of all individuals who have bought groceries online in the last year, 2014

Online sales

Leading online players

The consumer – What you need to know

Single shoppers on the rise and men doing more

Top up shopping widespread

Online shopping still small

A quarter of primary shoppers use Leclerc

Lidl top for secondary shopping

The consumer – Who shops for groceries

Almost two-thirds of adults are responsible for grocery shopping

Figure 42: France: Who is responsible for grocery shopping, September 2015

Shopping becoming less just women's work

Figure 43: France: Who is responsible for grocery shopping, September 2015

The consumer – How they shop for groceries

Top up shopping widespread

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 44: France: How they shop for groceries, September 2015

How they do a regular main shop: in-store versus online

Figure 45: France: How they shop for groceries (main shop), in-store versus online, September 2015

How they do top-up shopping: in-store versus online

Figure 46: France: How they shop for groceries (top-up shops), in-store versus online, September 2015

The consumer – Where they shop for groceries

A quarter of primary shoppers use Leclerc

Figure 47: France: Where they spend most on groceries, September 2015

Figure 48: France: Where they spend most on groceries, by age and income, September 2015

Lidl top for secondary shopping

Figure 49: France: Where else they shop for groceries in a typical month, September 2015

Figure 50: France: Where else they shop for groceries in a typical month, by age and average income, September 2015

Appendix – Data sources, abbreviations and supporting information

Abbreviations

Data sources

Germany

Overview

What you need to know

Areas covered in this report

Executive summary

The market

Spending and inflation

Figure 51: Germany: Consumer spending on food and drink (including sales tax), 2011-15

Channels of distribution

Figure 52: Germany: Estimated distribution of spending on food, beverages and tobacco, 2014

Sector size and forecast

Figure 53: Germany: Retail sales at all food retailers, 2010-15

Leading players

Key metrics

Market shares

Figure 54: Germany: Leading grocery retailers' estimated shares of all food retailers' sales, 2014

Online

Figure 55: Germany: Percentage of all individuals who have bought online in the past 12 months, 2014

The consumer

Who shops for groceries

Figure 56: Germany: Who is responsible for grocery shopping, September 2015

How they shop for groceries

Figure 57: Germany: How they shop for groceries, September 2015

Figure 58: Germany: How they shop for groceries, in-store versus online, September 2015

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Where they shop for groceries

Figure 59: Germany: Where they shop for groceries, September 2015

Figure 60: Germany: Where else they buy groceries from, September 2015

What we think

Issues and insights

Online retailing showing signs of development

The facts

The implications

A mature market restricts store expansion

The facts

The implications

The market – What you need to know

Spending down with inflation

The grocers grow their share of consumer spending

Food retailers' share of total spending stabilises

Spending and Inflation

Spending

Figure 61: Germany: Consumer spending (including sales tax), 2010-15

Inflation

Figure 62: Germany: Consumer prices: Annual % change, January 2014-September 2015

Figure 63: Germany: Consumer prices: Annual % change, 2010-14

Channels of distribution

Grocers account for 76% of spending

Figure 64: Germany: Estimated distribution of spending on food, beverages and tobacco, 2014

Sector size and forecast

Food retailers' share of total spending stabilises

Figure 65: Germany: Retail sales (excluding sales tax), 2010-15

Figure 66: Germany: Retail sales forecasts (excluding sales tax), 2015-20

Leading retailers – What you need to know

Supermarkets stabilise their market share

Aldi sales fall in 2014

Kaiser's Tengelmann takeover blocked

Leading retailers

Supermarkets stabilise their market share

Figure 67: Germany: Share of leading retailers sales by operation type, 2012-14

Aldi sales fall in 2014

Discounter's softening their offer

Kaiser's Tengelmann takeover blocked

Figure 68: Germany: Leading grocery retailers: Net revenues, 2012-14

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 69: Germany: Leading grocers: Store numbers, 2012-14

Sales per outlet

Figure 70: Germany: Leading grocers: Annual sales per outlet, 2012-14

Market share

Figure 71: Germany: Leading grocery retailers' estimated shares of all food retailers' sales, 2012-14

Online

Online food retailing remains underdeveloped

Online activity

Figure 72: Germany: Percentage of all individuals who have bought online in the past 12 months, 2014

Figure 73: Germany: Percentage of all individuals purchasing online in the past 12 months, 2010-14

Online sales

Leading online players

Figure 74: Germany: Leading grocers' online offers, October 2015

The consumer – What you need to know

High levels of sole/main shopping responsibility

German consumers prefer multiple shopping trips

Financial health dictates shopping behaviour

Single person households prefer small, regular shopping trips

Online remains very underused

Lidl and Rewe most popular for main shop

Discounters more dominant for secondary shopping

The consumer – Who shops for groceries

High levels of grocery shopping responsibility

Figure 75: Germany: Who is responsible for grocery shopping, September 2015

Power of one

Figure 76: Germany: Distribution of household type, 2005-14

The consumer – How they shop for groceries

Top-up shopping dominates

Figure 77: Germany: How they shop for groceries, September 2015

Financial health dictates shopping behaviour

Figure 78: Germany: Where they buy groceries from, by average income. September 2015

Figure 79: Germany: How they shop for groceries, by financial health, September 2015

Single person households prefer top-up shopping

Figure 80: Germany: How they shop for groceries, by household size, September 2015

Where they do regular main and top-up grocery shopping

Figure 81: Germany: How they shop for groceries, in-store versus online, September 2015

The consumer – Where they shop for groceries

Lidl and Rewe most popular for main shop

Figure 82: Germany: Where they spend the most on groceries, September 2015

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 83: Germany: Where they spend most in a typical month for groceries, by age and affluence, September 2015

Rewe is the favourite of top-up only shoppers

Figure 84: Germany: With which grocery retailer they spend the most money, selected retailers by type of shopping behaviour, September 2015

Aldi the overall favourite for top-up shopping

Figure 85: Germany: Where else they buy groceries from. September 2015

Figure 86: Germany: Where else they buy groceries from. September 2015

Appendix – Data sources, abbreviations and supporting information

Abbreviations

Data sources

Italy

Overview

What you need to know

Areas covered in this report

Executive summary

The market

Spending and inflation

Figure 87: Annual % change in total household expenditure and expenditure on food, beverages and tobacco, 2010-15

Channels of distribution

Figure 88: Italy: Estimated distribution of spending on food and beverages, 2014

Sector size and forecast

Figure 89: Italy: Annual % change in all retail sales (excl. fuel) and food retail sales, 2010-16

Leading players

Key metrics

Market shares

Figure 90: Italy: Leading grocery retailers' estimated shares of all food retailers' sales, 2014

Online

Figure 91: Italy: Percentage of all individuals who have bought groceries online in the last year, 2014

The consumer

Who shops for groceries

Figure 92: Italy: Who is responsible for grocery shopping, September 2015

How they shop for groceries

Figure 93: Italy: How they shop for groceries, September 2015

Where they shop for groceries

Figure 94: Italy: Where they spend the most on groceries, September 2015

What we think

Issues and insights

Retailers need to address the rise in single person households

The facts

The implications

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Click-and-collect: A logical solution?

The facts

The implications

The market – What you need to know

Consumer spending remains low

Spending concentrated among the major operators

Food retail sales continue to falter

Spending and inflation

Spending

Figure 95: Italy: Consumer Spending on food and drink (incl. VAT), 2010-15

Inflation

Figure 96: Italy: Harmonised indices of consumer prices: annual % change, Jan 2014-Sep 2015

Figure 97: Italy: Harmonised indices of consumer prices: Annual % change, 2010-14

Channels of distribution

Figure 98: Italy: Estimated distribution of spending on food and beverages, 2014

Figure 99: Italy: Estimated distribution of spending on food and beverages, 2010-15

Sector size and forecast

Market remains tough

Figure 100: Italy: Food retailers' sales (excl. VAT), 2010-15

Figure 101: Italy: Food retailers' sales forecasts (excl. VAT), 2015-20

Leading retailers – What you need to know

Consolidation in a tough environment

Lidl flourishing in the current market conditions

Strength in numbers

Leading retailers

Market leader sees sales fall in 2014

Figure 102: Italy: Leading grocery retailers, by revenues (excl vat), 2011-14

Store numbers

Figure 103: Italy: Leading grocery retailers' outlet numbers, 2011-14

Sales per outlet

Figure 104: Italy: Leading grocery retailers' sales per outlet, 2011-14

Market share

No change at the top

Figure 105: Italy: Leading grocery retailers' estimated shares of all food retailers' sales, 2014

Figure 106: Italy: Leading grocery retailers' estimated shares of all food retailers' sales, 2010-14

Online

An underdeveloped channel

Online activity

Figure 107: Italy: Percentage of all individuals who have bought groceries online in the last year, 2014

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 108: Italy: Percentage of all individuals purchasing online in the past 12 months, 2009-14

Online market size

The consumer – What you need to know

Responsibility falls on female consumers

A majority combine a main-shop with a top-up

Coop Italia the go-to destination for primary shops but Lidl capturing secondary shops

Half of consumers responsible for grocery shopping

Figure 109: Italy: Who is responsible for grocery shopping, September 2015

There remains a gender split in the responsibility of grocery shopping

Figure 110: Italy: Who is responsible for grocery shopping, by gender, September 2015

Figure 111: Italy: Main grocery responsibility, by gender and age, September 2015

The consumer – How they shop for groceries

Main shops are being combined with top-ups

Figure 112: Italy: How they shop for groceries, September 2015

How they do a regular main shop: in-store versus online

Figure 113: Italy: How they shop for groceries, by main shop behaviour, September 2015

The consumer – Where they shop for groceries

Coop Italia the primary destination for grocery shopping

Figure 114: Italy: Where they spend the most on groceries, September 2015

Figure 115: Italy: Where they spend the most on groceries, by age and average income, September 2015

Lidl the go-to retailer for secondary shops

Figure 116: Italy: Where else they shop for groceries in a typical month, September 2015

Figure 117: Italy: Where else they shop for groceries in a typical month, by age and average income, September 2015

Appendix – Data sources, abbreviations and supporting information

Abbreviations

Data sources

Spain

Overview

What you need to know

Areas covered in this report

Executive summary

The market

Spending and inflation

Figure 118: Spain: Annual % change in total household expenditure and expenditure on food, beverages and tobacco, 2011-15

Channels of distribution

Figure 119: Spain: Estimated distribution of spending on food and drink, 2014

Sector size and forecast

Figure 120: Spain: Annual % change in all retail sales (excl. fuel) and food retailers' sales, 2011-16

Leading players

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Key metrics

Market shares

Figure 121: Spain: Leading grocery retailers' shares of all food retailers' sales, 2014

Online

Figure 122: Spain: Percentage of individuals buying online in the past 12 months, 2014

The consumer

Who shops for groceries

Figure 123: Spain: Who is responsible for grocery shopping, September 2015

How they shop for groceries

Figure 124: Spain: How they shop for groceries, September 2015

Where they shop for groceries

Figure 125: Spain: Where they spend the most on groceries, September 2015

What we think

Issues and insights

Can hypermarkets make a come-back?

The facts

The implications

How can retailers address the rise in single person households?

The facts

The implications

The market – What you need to know

Food will fall as % of all consumption

Food deflation in 2014

Grocers account for almost two thirds of food and drink spending

Food retailers set to lose share of all retail sales

Spending and inflation

Consumer spending

Figure 126: Spain: Consumer spending on food, drink and tobacco (incl. VAT), 2010-15

Inflation

Figure 127: Spain: Harmonised indices of consumer prices – annual % change, 2010-14

Figure 128: Spain: Harmonised indices of consumer prices – year-on-year % change food and drink, April 2014-Sept 2015

Channels of distribution

Grocers account for almost two-thirds of food and drink spending

Figure 129: Spain: Estimated distribution of spending on food, drink and tobacco, 2014

Sector size and forecast

Sector share stabilises

Figure 130: Spain: Food retailers' sales (excl. VAT), 2010-15

Figure 131: Spain: Food retailers' sales forecasts (excl. VAT), 2015-20

Leading retailers – What you need to know

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Mercadona will face stronger competition

Consolidation stalls in 2014

Online investment to pick up

Leading food retailers

Mercadona continues to outperform

Discounters strengthen their offer

Hypermarkets hold back other groups

Grupo Eroski reinvents itself

Sales

Figure 132: Spain: Leading grocery retailers - sales (excl.VAT), 2011-14

Store numbers

Figure 133: Spain: leading grocery retailers - outlet numbers, 2011-14

Sales per outlet

Figure 134: Spain: Leading grocery retailers – estimated sales per outlet, 2011-14

Market shares

Consolidation stalls in 2014

Figure 135: Spain: Leading grocery retailers' shares of all food retailers sales, 2011-14

Online

Online activity

Figure 136: Spain: Percentage of individuals purchasing online in the past 12 months, 2009-14

Online sales and leading retailers

Multichannel investment will pick up

Threat from Amazon?

The consumer – What you need to know

Numbers responsible for grocery shopping could rise

Women are key primary shoppers

Proximity shopping thrives

Online shoppers a small minority

Mercadona dominates

Secondary shopping more dispersed

The consumer – Who shops for groceries

Number of people responsible for grocery shopping could rise

Figure 137: Spain: Who is responsible for grocery shopping, September 2015

More women are primary shoppers

40% of men are mainly/wholly responsible for grocery shopping

Figure 138: Spain: Who is responsible for grocery shopping, September 2015

The consumer – How they shop for groceries

Proximity shopping thrives

Expanding the fresh offer

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 139: Spain: How they shop for groceries, September 2015

How they do a regular main shop: in-store versus online

Figure 140: Spain: How they shop for groceries, in-store versus online, September 2015

Potential online shoppers

Figure 141: Spain: How they shop for groceries, in-store versus online, September 2015

The consumer – Where they shop for groceries

Mercadona attracts a third of primary shoppers

Figure 142: Spain: Where they spend most on groceries, September 2015

Figure 143: Spain: Where they spend most on groceries, by age and affluence, September 2015

Four players dominate the secondary shop

Figure 144: Spain: Where else they shop for groceries in a typical month, September 2015

Figure 145: Spain: Where else they shop for groceries in a typical month, by age and affluence, September 2015

Appendix – Data sources, abbreviations and supporting information

Abbreviations

Data sources

UK

Overview

What you need to know

Areas covered in this report

Executive summary

The market

Figure 146: Consumers: State of finances, 2009-15

Food retailers' sales

Figure 147: Food retailers: Breakdown of sector, 2015 (est)

Figure 148: All food retailers: Sales, 2010-20

Figure 149: Channels of distribution for food and drink, 2014

Socio-economic changes

Prices

Online

Leading retailers

Market shares

Space allocation and product mix

Figure 150: Leading food retailers: Sales mix, 2014

The consumer

Tesco dominant

Figure 151: Retailer most money spent in during the last month, August 2015

Main shop vs convenience

Figure 152: Proportions of grocery shoppers who have changed the way they shop in the last year, August 2015

What do people want from their supermarket?

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 153: Most important factor in choosing where to shop, August 2015

Key factors by supermarket used

Satisfaction

Figure 154: Overall net satisfaction with main retailer by criteria, August 2015

Opening hours

Figure 155: Attitudes towards Sunday opening, August 2015

Pricing

Figure 156: Attitudes towards grocers' pricing, August 2015

Non-foods

Figure 157: Attitudes towards buying non-foods and services from grocery retailers, August 2015

What we think

Issues and Insights

Why are the superstores losing market share?

The facts

The implications

Should the superstores be cutting prices?

The facts

The implications

Is this the end of the superstore?

The facts

The implications

Online – A threat?

The facts

The implications

The market – What you need to know

Consumer confidence

Inflation

Consumer spending

Non-retail and services

Sales mix

Channels of distribution

Sector prospects

Socio-economic changes

Prices

Market drivers

Consumer confidence

Figure 158: Consumers: State of finances, 2009-2015

Food tracker

Figure 159: People who look out for special offers, Dec 2013-Aug 2015

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Aldi, Lidl

Figure 160: People who shop more or the same at Aldi and Lidl, Dec 2013-Aug 2015

Inflation

Figure 161: Food and drink inflation, 2010-15

Consumer spending on food and drink

Food and drink

Figure 162: Spending on food drink and tobacco, 2010-14

Non-foods

Figure 163: Spending on key non-food categories, 2010-14

Non-retail and services

Fuel

Figure 164: Leading food retailers: Share of fuel sales, 2011-14

Banking and financial services

Other non-retail

Food retailers sales mix

Figure 165: Food retailers: Sales, by product, 2014

Channels of distribution

Figure 166: Channels of distribution for food and drink, 2014

Sector size and forecast

Figure 167: All food retailers, year-on-year growth 2010-15

Figure 168: Food retailers market size (including VAT), 2010-14

Figure 169: Food retailers: Breakdown of sector, 2015 (est)

Forecast

Figure 170: All food retailers: Sales, 2010-20

Figure 171: Food superstores: Sales 2010-20

Figure 172: Convenience stores: Sales value, 2010-20

Figure 173: Discounters and other value retailers: Sales value, 2010-20

Figure 174: Food and drink specialists: Sales, 2010-20

Where people live

Figure 175: Proportion of people renting their homes, 2001-14

Figure 176: Profile of population, by nature of home tenure, 2014

Pricing and the CMA report

Which?'s complaints

The CMA response

Where next?

Key players – What you need to know

Online

Leading retailers

Market shares

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Space allocation and product mix

Innovation and launch activity

Enhanced in-store experience

Figure 177: Asda in-store virtual reality Halloween experience, Watford

Making shopping trips easier

"Transumers"

New not-for-profit grocery store concept

'App-less' shopping platform

24/7 click-and-collect

Amazon ups the ante with one-hour grocery service

Speciality supermarket

Discount grocery chain targeting value-conscious shoppers

Leading grocery retailers: Key metrics

2014: A year to forget for the major operators

Figure 178: Leading grocery retailers: Net sales, 2010-14

The market remains tough but there are signs of improvement for the majors

Figure 179: Like-for-like sales performance, Exc. VAT and Fuel, Q1 2014-Q2 2015

Store numbers and sales per outlet

Figure 180: Leading grocery retailers: Store numbers, 2010-14

Figure 181: Leading grocery retailers: Annual sales per outlet, 2010-14

Sales area and sales densities

Figure 182: Leading grocery retailers: Total sales area, 2010-14

Figure 183: Leading grocery retailers: Annual sales per sq m, 2010-14

Operating profits and margins

Figure 184: Leading grocery retailers: Operating profits, 2010-14

Figure 185: Leading grocery retailers: Operating margins, 2010-14

Market shares

Figure 186: Leading grocery retailers: Share of sector sales, 2014

Figure 187: Leading grocery retailers: Share of sector sales, 2010-15

Figure 188: Market shares: The Big Four grocery multiples, 2010-15

Figure 189: Market shares: Aldi and Lidl, 2010-15

A note on our market shares

Space allocation and retail product mix

Online

Figure 190: Online sales by grocers as a % of all grocery sector sales, 2010-15

Figure 191: Online sales by grocers, (including VAT), 2010-15

Figure 192: Online sales by grocers, (including VAT), 2010-15

Market shares

Figure 193: Leading online grocery retailers market shares, 2014

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 194: Leading online grocery retailers market shares, 2010-14

Coverage and fulfilment

Figure 195: Major grocery retailers offering grocery click-and-collect services, 2015

Space allocation summary

Summary data and classifications

Figure 196: Food, non-food standard classifications, 2015

Convenience – Comparison goods

Figure 197: UK leading food retailers: Convenience comparison overview split, October 2015

Figure 198: UK leading food retailers: Detailed convenience comparison split, October 2015

Fresh food focus

Figure 199: UK leading food retailers: Food and drink categories as a percentage of total space allocated to food and drink, October 2015

Detailed space allocation data

Figure 200: UK leading food retailers: Overview percentage linear shelf space split in front of the checkout area by Food and Non-alcoholic drinks, Alcohol, Grocery non-foods, and General merchandise, October 2015

Figure 201: UK hypermarkets: Estimated space allocations, October 2015

Figure 202: UK hypermarkets: Estimated space allocations, October 2015 (continued)

Figure 203: UK hypermarkets: Estimated space allocations, October 2015 (continued)

Figure 204: UK hypermarkets: Estimated space allocations, October 2015 (continued)

Figure 205: UK leading superstores: Estimated space allocations, October 2015

Figure 206: UK leading superstores: Estimated space allocations, October 2015 (continued)

Figure 207: UK leading superstores: Estimated space allocations, October 2015 (continued)

Figure 208: UK leading superstores: Estimated space allocations, October 2015 (continued)

Figure 209: UK smaller stores and hard discounters: Estimated space allocations, October 2015

Figure 210: UK smaller stores and hard discounters: Estimated space allocations, October 2015 (continued)

Figure 211: UK smaller stores and hard discounters: Estimated space allocations, October 2015 (continued)

Figure 212: UK smaller stores and hard discounters: Estimated space allocations, October 2015 (continued)

Retail product mix

Figure 213: Leading food retailers: Estimated sales mix, 2014

Figure 214: Leading food retailers: Sales as % all retail sales, 2014

Figure 215: Sales density, by broad product category, 2014

Figure 216: Major food retailers: Estimated market share of key categories, 2014

Brand research – Supermarkets

What you need to know

Brand map

Figure 217: Attitudes towards and usage of selected supermarket brands, August 2015

Key brand metrics

Figure 218: Key metrics for selected supermarket brands, August 2015

Brand attitudes: Established supermarkets defined by wide presence

Figure 219: Attitudes, by supermarket brand, August 2015

Brand personality: M&S Simply Food and Waitrose have exclusive images, while The Co-operative is seen as boring or tired

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 220: Brand personality – Macro image, August 2015

Aldi, Lidl and Iceland still seen as somewhat basic by many

Figure 221: Brand personality – Micro image, August 2015

Brand analysis

The Big Four remain largely dominant

Customer service and wide availability likely to influence usage

Aldi overtakes Morrisons on trust

Aldi and Lidl continue to build trust

Both brands cause consumers to redefine what counts as value

Iceland's prospects improve

M&S Simply Food and Waitrose still noted for quality and being expensive

Differentiation from other supermarkets protects M&S Simply Food and Waitrose image and position

The Co-operative has an ethical image but also seen in more negative terms than other brands

Negative perceptions do not appear to influence a drop in usage however

Advertising and marketing activity

Sector advertising spend up 6.2% in 2014

Figure 222: Recorded above-the-line, online display and direct mail total advertising expenditure by UK supermarket and online grocers, 2011-14

Asda is the biggest spender

Figure 223: Recorded above-the-line, online display and direct mail total advertising expenditure by leading UK grocery retailers, 2011-14

Share of advertising spend

Figure 224: Percentage media type split of recorded above-the-line, online display and direct mail total advertising expenditure by UK supermarkets and online grocers, 2011-14

Figure 225: Percentage of recorded above-the-line, online display and direct mail total advertising expenditure by the UK's leading grocery retailers, by media type, 2014

A note on adspend

The consumer – What you need to know

Tesco dominant

Main shop vs convenience

What do people want from their supermarket?

Key factors by supermarket used

Satisfaction

Opening hours

Pricing

Non-foods

Where they shop

Who does the shopping

Main shop vs convenience shop

Figure 226: Profile of grocery shoppers, by how often they shop, August, 2015

Figure 227: Proportions of grocery shoppers who have changed the way they shop in the last year, August 2015

Figure 228: Profile of those who have changed their shopping habits, August 2015

Figure 229: Profile of those who have changed their shopping habits, August 2015

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Online vs in-store

Figure 230: Online and in-store shoppers, August 2015

Figure 231: Profile of main shop and top-up shoppers, by where they shop, August 2015

Main shop

Figure 232: Retailer most money spent in during the last month, August 2015

Figure 233: Profile of main shoppers, August 2015

2015 vs 2013

Figure 234: Retailer most money spent with in last month, August 2013 and August 2015

Also shop

Figure 235: Retailer also used in a typical month, August 2015

Figure 236: Profile of shoppers at "also used" shops, August 2015

How many retailers used?

Figure 237: Number of different retailers "also used" in the last month, August 2015

Figure 238: Profile of shoppers by the number of other supermarkets used, August 2015

Factors important in choosing a supermarket

Figure 239: Factors in choosing where to shop, August 2015

Figure 240: Most important factor in choosing where to shop, August 2015

Who chooses which factors

Figure 241: Profile of people valuing key factors, August 2015

Top rank

Figure 242: Profile of those who chose the factor first, August 2015

Regional differences

Figure 243: Regional profile of factor preferences, August 2015

Prices – A consumer perspective

Key factors vs where people shop

Tesco

Figure 244: Tesco shoppers: Relative importance of key factors, August 2015

Sainsbury's

Figure 245: Sainsbury's shoppers: Relative importance of key factors, August 2015

Asda

Figure 246: Asda shoppers: Relative importance of key factors, August 2015

Morrisons

Figure 247: Morrisons shoppers: Relative importance of key factors, August 2015

Aldi

Figure 248: Aldi shoppers: Relative importance of key factors, August 2015

Most important factor

Figure 249: Most important factor by where people shop most, August 2015

The CMA report

Customer satisfaction with grocery shopping

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 250: Overall net satisfaction with main retailer by criteria, August 2015

Figure 251: Key drivers of overall satisfaction with the main grocery retailer used, August 2015

Figure 252: Overall satisfaction with the main grocery retailer used – Key driver output, August 2015

Quality of fresh foods

Figure 253: Satisfaction with fresh food quality, by most used retailer, August 2015

Figure 254: Satisfaction with ready meal quality, by most used retailer, August 2015

Service

Figure 255: Satisfaction with customer service, by most used retailer, August 2015

Figure 256: Satisfaction with décor and cleanliness, by most used retailer, August 2015

Checkouts

Figure 257: Satisfaction with waiting time at checkout, by most used retailer, August 2015

Availability

Figure 258: Satisfaction with availability, by most used retailer, August 2015

Satisfaction by retailer

Attitudes towards opening hours

Figure 259: Attitudes towards Sunday opening, August 2015

Figure 260: Profile of those who agree/disagree with longer opening hours, August 2015

Figure 261: Customers of major supermarkets who would like longer opening hours, August 2015

Attitudes towards grocery pricing

Figure 262: Attitudes towards grocers' pricing, August 2015

Figure 263: Attitudes towards supermarket promotion, by where people do their main shop, August 2015

Figure 264: Trust in supermarket price matching promises, by where people do their main shop, August 2015

Figure 265: People thinking that supermarkets raise prices ahead of promotions, by where they do their main shop, August 2015

Grocers and non-foods

Figure 266: Attitudes towards buying non-foods and services from grocery retailers, August 2015

Non-foods and retailers used

Impulse buys

Figure 267: Impulse buyers by where they do their main shop, August 2015

Figure 268: Buyers of non-foods as part of regular shop, August 2015

Services

Figure 269: Users of supermarket financial services by where they do their main shop, August 2015

Appendix – Data sources, abbreviations and support information

Key driver analysis

Methodology

Interpretation of results

Figure 270: Overall satisfaction with the main grocery retailer used – Key driver output, August 2015

Figure 271: Satisfaction with the main grocery retailer used, August 2015

Data sources

Financial definitions

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

VAT

Forecast methodology

Abbreviations

Ahold Group

What we think

Ahold and Delhaize to merge

Online: a key growth area

Innovative store formats

Company background

Company performance

Figure 272: Ahold Group: Retail division financial performance, excl. VAT, 2010-14

Figure 273: Ahold Group: Outlet data, 2010-14

Retail offering

Aldi

What we think

Aldi Sud still the innovator

The UK

Costs

Online

Everywhere else

Company background

Company performance

Figure 274: Aldi: Group financial performance, 2010-14

Figure 275: Aldi: Outlet data, 2010-14

Retail offering

Asda Group

What we think

Poor performance

Cost cutting

Quality

The customer point of view

Black Friday

Where next

Company background

Company performance

Figure 276: Asda Group Ltd: Group financial performance, 2010-14

Figure 277: Asda Group Ltd: Outlet data, 2010-14

Retail offering

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Auchan

What we think

A primarily hypermarket business

Growing importance of Eastern Europe

What of the future?

Company background

Company performance

Figure 278: Auchan: Group financial performance, 2010-14

Figure 279: Auchan: Revenue by region, 2010-14

Figure 280: Auchan: Retail sales estimates by country (Europe only), 2010-14

Stores

Supermarkets

Figure 281: Auchan: Outlet data (consolidated stores only), 2010-14

Other retail formats

Groupe Auchan – Non retail activities

Retail Offering

Carrefour

What we think

Turnaround plan bearing fruit

Smaller stores

Online a prime focus

Company background

Company performance

Figure 282: Carrefour: Group financial performance, 2010-14

Figure 283: Carrefour: Outlet data, 2010-14

Figure 284: Carrefour (Europe): Outlet numbers 2012-14

Figure 285: Carrefour: European hypermarket numbers (directly operated stores only), 2014

Figure 286: Carrefour: European supermarket numbers (directly operated stores only), 2014

Figure 287: Carrefour: European C-store numbers (directly operated stores only), 2014

Retail offering

Casino

What we think

Reinventing Géant

Middle ground the problem

A focus on convenience

Company background

Company performance

Figure 288: Casino: Group financial performance, excl. sales tax, 2010-14

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 289: Casino: Outlet data (excluding franchises), 2010-14

Retail offering

The Co-operative Food

What we think

Bringing down the price of fresh food

Local and to-go

No plans to launch into online grocery

Large stores strategy

Meeting demand for little, but often grocery shopping

Company background

Company performance

Figure 290: The Co-operative Food: Group financial performance, 2010/11-2014/15

Figure 291: The Co-operative Food: Outlet data, 2010/11-2014/15

Retail offering

Dia

What we think

Major changes

Spain starts to pick up

Mixed portfolio adds flexibility

Balancing a softer positioning with cost efficiencies

International

Company background

Company performance

Figure 292: Dia: Group financial performance, 2011-14

Figure 293: Dia: Group outlet data, 2011-14

Figure 294: Dia Spain: Store formats

Retail offering

Edeka Group

What we think

Gastronomy attractions to inspire and attract customers

Tapping into growth markets

Upgrading the discount in-store experience

The first German discount supermarket to join a loyalty scheme

Innovative time-saving click and collect proposition

Expanded online offering

Company background

Company performance

Figure 295: Edeka Group: Core food retailing financial performance, 2010-14

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 296: Edeka Group: Outlet data, 2010-14

Retail offering

Iceland Foods

What we think

New store format offers more reasons to visit

Online operation worth £100m a year in sales

Frozen food credentials

Company background

Company performance

Figure 297: Iceland Foods Ltd: Group financial performance, 2010/11-2014/15

Figure 298: Iceland Foods Ltd: Outlet data, 2010/11-2014/15

Retail offering

Intermarché /ITM Entreprises (Groupement des Mousquetaires)

What we think

Mag3.E enhanced in-store shopping experience

Bargaining strength through joint purchasing alliances

Tapping into new technology to make in-store shopping quicker

Polish expansion on the back of dynamic sales growth in 2014

Drive-thru service expansion and click-and-collect lockers roll-out

Company background

Company performance

Figure 299: Groupement des Mousquetaires (Intermarché /ITM Entreprises): Core European retail activity financial performance, 2010-14

Figure 300: Groupement des Mousquetaires (Intermarché /ITM Entreprises): Core European retail outlet data, 2010-2014

Retail offering

Jerónimo Martins

What we think

New strategy to lift Biedronka sales and profitability

Leveraging sales through promotions and innovative new products in Portugal

Online grocery services

Company background

Company performance

Figure 301: Jerónimo Martins - European grocery retail: financial performance, 2010-14

Figure 302: Jerónimo Martins - European grocery retail: Outlet data, 2010-14

Retail offering

E Leclerc

What we think

Drive continues to perform well

Investing for the future

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Strengthening its position via alliances

Company background

Company performance

Figure 303: E Leclerc: Group financial performance, excl. VAT, 2010-14

Figure 304: E.Leclerc: Estimated international sales by country, excl. VAT, Inc. fuel, 2011-14

Figure 305: E. Leclerc: Group outlet data, 2010-14

Retail offering

Marks & Spencer (UK food)

What we think

Differentiation through product offering

Well positioned to capitalise on the demand for little, but often grocery shopping

More stores carrying the full food product range

Tapping into wearable technology to make food shopping easier

Click-and-collect service gives consumers another reason to visit M&S Simply Food stores

Enhanced in-store food experiences

Overseas store expansion

M&S Sparks

Limited online grocery service, which is sufficient for its positioning

Company background

Company performance

Figure 306: Marks & Spencer (UK food): Group financial performance, 2010/11-2014/15

Figure 307: Marks & Spencer (UK food): Food outlets, by format, 2010/11-2014/15

Figure 308: Marks & Spencer (UK food): Outlet data, 2010/11-2014/15

Retail offering

Mercadona

What we think

Solid performance

Strong balance sheet

Integrated suppliers and own brands

Continued investment in stores

Competition builds

Company background

Company performance

Figure 309: Mercadona: Financial performance, 2010-14

Figure 310: Mercadona: Outlet data, 2010-14

Retail offering

Ocado

What we think

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Appealing to a different market

Figure 311: Ocado: New customer household income distribution (by year of registration), 2010 and May 2015

Still no news on international tie-up

Amazon eyeing the market

Click-and-collect slow to develop

Company background

Company performance

Figure 312: Ocado Ltd: Group financial performance, 2009/10-2013/14

Retail offering

Real (Metro Group)

What we think

New buying deal should bolster Real's competitive position

Store revamp programme yielding positive results

A new and more efficient logistical infrastructure to come on-stream in early 2017

A new convenient food venture

Company background

Company performance

Figure 313: Real: Group financial performance, 2010/11-2014/15

Figure 314: Real: Outlet data, 2010/11-2014/15

Retail offering

Rewe

What we think

Penny

Online

Where next

Company background

Company performance

Figure 315: Rewe: Group financial performance, 2010-14

Figure 316: Rewe: Outlet data, 2010-14

Retail offering

Rewe

Penny

Penny

J. Sainsbury

What we think

Sainsbury's stands out

Doing it right

Netto

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Where next

Company background

Company performance

Figure 317: J. Sainsbury: Group financial performance, 2010/11-2014/15

Figure 318: J. Sainsbury: Outlet data, 2010/11-2014/15

Retail offering

Schwarz Group (Lidl, Kaufland)

What we think

Cost

Kaufland

Expansion

Where next

Company background

Company performance

Figure 319: Schwarz Group: Group financial performance, 2010/11-2014/15

Figure 320: Schwarz Group: Outlet data, 2010/11-2014/15

Retail offering

Spar International

What we think

Transit locations

Pushing its health and wellness credentials

Leading the contactless payment revolution

Strengthening local ties

New digital strategy to connect with Millennials

An award winning brand

Building on its foodservice offering

Company background

Company performance

Figure 321: Spar International: Retail sales, by country, 2010-14

Figure 322: Spar International: Outlets, 2010-14

Figure 323: Spar International: Retail sales area, 2010-14

Figure 324: Spar International: Sales per sq m, by country, 2010-14

Retail offering

Tesco

What we think

Moving on

Dave Lewis

Reinvestment in stores

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Europe - November 2015

Report Price: £2895.00 | \$4688.31 | €3677.55

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Balance sheet

The store portfolio

International

Cause for optimism

Company background

Company performance

Figure 325: Tesco store portfolio, 2014-15

Figure 326: Tesco Plc: Group financial performance, 2010/11-2014/15

Figure 327: Tesco Plc: Outlet data, 2010/11-2014/15

Retail offering

Waitrose

What we think

Customised loyalty scheme deepening the brand's value credentials

Compelling in-store experiences to drive footfall and increase dwell time

Building its online business

Customer driven services differentiator

Adapting to changing consumer shopping habits

Company background

Company performance

Figure 328: Waitrose Ltd: Group financial performance, 2010/11-2014/15

Figure 329: Waitrose Ltd: Outlet data, 2010/11-2014/15

Retail offering

Wm Morrison Group

What we think

Everyday low price positioning

Contactless payment, express checkouts, extended opening hours

Bespoke store format that resonates with local communities

Figure 330: Morrisons, Weybridge: Fresh vegetable product display, January 2015

Online service lacks coverage and delivery options

New convenience store format

Geo-location advertising method boosts intent to buy

Company background

Company performance

Figure 331: Wm Morrison Group: Group financial performance, 2010/11-2014/15

Figure 332: Wm Morrison Group: Outlet data, 2010/11-2014/15

Retail offering

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com