

Supermarkets - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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



“The supermarket sector is growing once more, but this growth has not been enough to stem the tide of spending moving away from large-format stores. This decade has seen unprecedented change in both how grocery shoppers behave and how the sector is structured.”
– Nick Carroll, Senior Retail Analyst

This report looks at the following areas:

- **The Asda and Sainsbury’s merger: 2+3=1?**
- **What does the future of supermarkets look like?**
- **Waste not, want not: Where do supermarkets sit in the fight against food waste?**

All grocery retail sales advanced 3% in 2017 to reach £176.7 billion, representing the strongest growth seen in the sector since 2011. This growth was of course driven to a degree by inflation, with food and drink prices soaring in 2017 (+2.3%) following Sterling’s devaluation after the EU referendum result in 2016. However, there was solid underlying growth, and we estimated that growth will accelerate in 2018 to 3.8%.

The supermarket sector also had its best year since 2012 in 2017 with the sector growing 1.3% to reach £88.4 billion, again helped by inflation. However, growth in the large-format sector could not match that of the overall sector, meaning that for the sixth consecutive year the supermarket channel lost share of all grocery retail sales. Despite this it remains the channel that accounts for over half of retail sales (52% in 2017) and the channel where two thirds (66%) of grocery shoppers spend the most in a typical month.

**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 - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Table of Contents

Overview

What you need to know
Products covered in this Report

Executive Summary

The market

Grocery sector expected to see sales accelerate in 2018

Figure 1: All food retail sales (inc. VAT), 2013-23

Supermarket sector is growing once more...

Figure 2: Supermarkets' market size and forecast (inc. VAT), 2013-23

...but growth remains slower than the wider sector

Figure 3: Estimated breakdown of sector sales, by channel, 2012-18

Inflation eases, allowing real incomes to grow once more

Figure 4: Average weekly earnings, by consumer price index, January 2015-September 2018

Companies and brands

Tesco remains the market leader but Sainsbury's and Asda will create stiff competition

Figure 5: Leading grocery retailers: share of all grocery retail sales, 2017

Aldi brand in rude health

Figure 6: Key metrics for selected brands, August 2018

The consumer

Most combine a main shop with a top-up

Figure 7: Household grocery buying behaviours, 2015-18

Two thirds still spend the most in supermarkets

Figure 8: Store format where the most is spent in a typical month, 2016-18

The majority of grocery shoppers shop with Tesco in a typical month

Figure 9: Grocery retailers used for primary and secondary shops, August 2018

Almost nine in 10 purchase non-foods from supermarkets

Figure 10: Non-food products purchased in-store or online in the past 12 months, August 2018

Just under three quarters use food counters

Figure 11: Food counter and café services used in supermarkets, August 2018

38% of grocery shoppers are very satisfied with their retailer of choice

Figure 12: Satisfaction with grocery retailer where the most is spent in a typical month, August 2018

Quality of fresh a key area, but consumers are worried about levels of food waste

Figure 13: Attitudes towards shopping for groceries, August 2018

What we think

Issues and Insights

The Asda and Sainsbury's merger: 2+3=1?

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 - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

The facts

The implications

What does the future of supermarkets look like?

The facts

The implications

Waste not, want not: Where do supermarkets sit in the fight against food waste?

The facts

The implications

The Market – What You Need to Know

Inflation eases, allowing real incomes to grow once more

Spending on food holding up well

Supermarket sector returns to growth in 2017...

...but growth remains slower than the wider sector

Market Drivers

Inflation high throughout 2017

Figure 14: Food and drink inflation, 2013-August 18

Real wages showing signs of growth in 2018

Figure 15: Average weekly earnings, by consumer price index, January 2015-September 2018

Figure 16: Consumer confidence: current financial situation vs sentiment for the coming year, January 2016-September 2018

Figure 17: UK household tenure status, 2012-17

Consumer Spending on Food and Drink

Figure 18: Consumer spending on core food and drink categories, 2013-18

Spending on food

Figure 19: Annual % change in the value, volume and prices in the food category, 2013-18

How food spending breaks down

Figure 20: Composition of consumer spending on food, categories as % of total spending, 2017

Spending on non-alcoholic drinks

Figure 21: Annual % change in the value, volume and prices in the non-alcoholic beverages category, 2013-18

2017 sees an uplift in alcoholic drink sales

Figure 22: Annual % change in the value, volume and prices in the alcoholic beverages category, 2013-18

Figure 23: Composition of consumer spending on alcoholic drinks, categories as a % of total spending, 2017

Sector Size and Forecast

Grocery sector sees growth accelerate driven by inflation

Figure 24: All food retail sales (inc. VAT), 2013-23

Figure 25: All food retail sales (inc. VAT), market size and forecast, in current and constant prices, 2013-23

Supermarket sector size

Figure 26: Supermarkets' market size and forecast (inc. VAT), 2013-23

Figure 27: Supermarkets: market size and forecast (inc. VAT), in current and constant prices, 2013-23

**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 - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Forecast methodology

Channels of Distribution

Despite competition, supermarkets still account for half the market

Figure 28: Estimated channels of distribution for grocery retail sales, 2017

Is the decline bottoming out?

Figure 29: Estimated breakdown of sector sales, by channel, 2012-18

The Consumer – What You Need to Know

Most combine a main shop with a top-up

Two thirds still spend the most in supermarkets

The majority of grocery shoppers shop with Tesco in a typical month

Tesco primary shoppers skew younger, whilst Sainsbury's skew older

Almost nine in 10 purchase non-foods from supermarkets

Just under three quarters use food counters

38% of grocery shoppers are very satisfied with their retailer of choice

Quality of fresh a key area, but consumers are worried about levels of food waste

How They Shop

Nine in 10 responsible

Most combine a main shop with a top-up

Figure 30: Household grocery buying behaviours, 2015-18

Habits are not static

Figure 31: Household grocery buying behaviours, March 2016-September 2018

Older consumers more likely to shop on a top-up basis...

Figure 32: Household grocery buying behaviours, by age, August 2018

...leading to most shopping multiple times per week

Figure 33: Frequency of household grocery buying, August 2018

Figure 34: Household grocery buying behaviours, by frequency of grocery shop, August 2018

Types of Stores Used

Growth in use of discounters and online has led to less reliance on supermarkets

Figure 35: Store format where the most is spent in a typical month, 2016-18

Who spends the most in supermarkets?

Figure 36: Store format where the most is spent in a typical month, by age. August 2018

Figure 37: Attitudes towards justification of supermarket visitation, by age, August 2018

Large families, large baskets

Figure 38: Store format where the most is spent in a typical month, by parental status and gender, August 2018

Where They Shop

Tesco is leading the way...

Figure 39: Grocery retailers used, August 2018

...but Aldi is the big winner

**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 - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 40: Trend of grocery retailers used, 2016-18

Tesco attracts both primary and secondary shoppers

Figure 41: Grocery retailers used for primary and secondary shops, August 2018

Just 7% are loyal to one retailer only

Figure 42: Repertoire of secondary retailers used, August 2018

Discounters appeal in a secondary capacity to Asda shoppers

Figure 43: Where leading retailers' primary shoppers also shop, August 2018

Retailer Demographic Comparison

Tesco attracts the young in a secondary capacity

Figure 44: Leading grocery retailers used for primary and secondary shops, by age, August 2018

Figure 45: The discounters: primary and secondary shoppers, by age, August 2018

Large towns a hotspot for Asda

Figure 46: Leading grocery retailers used for primary and secondary shops, by location, August 2018

Aldi is making inroads in the North

Figure 47: Leading retailers' primary shoppers, by region live in, August 2018

Figure 48: Leading retailers' secondary shoppers, by region live in, August 2018

Asda usage prevalent amongst lower income groups

Figure 49: Leading grocery retailers used for primary and secondary shops, by household income bracket, August 2018

Figure 50: Aldi and Lidl, primary and secondary grocery shoppers, by household income bracket, August 2018

Non-foods in Supermarkets

More than four in five purchased non-foods in-store at supermarkets

Figure 51: Non-food products purchased in-store or online in the past 12 months, August 2018

George the most shopped from brand

Figure 52: Supermarket brand shopped with in-store or online in the past 12 months, by categories of clothing, August 2018

Only a third of supermarket shoppers are influenced by non-foods

Figure 53: Behaviours in supermarkets, August 2018

Counter Services and Non-food Services in Supermarkets

Three quarters (73%) of supermarket shoppers use food counters

Figure 54: Food counter and café services used in supermarkets, August 2018

Most see food counters as more important than non-food areas

Figure 55: Attitudes towards food counts in supermarkets, by age, August 2018

Refreshing the counter line-up could engage younger consumers

Figure 56: Food counter and café services used in supermarkets, by age, August 2018

Figure 57: Repertoire of food-based services typically used in supermarkets, August 2018

Morrisons shoppers far more likely to use counter services

Figure 58: Food counter and café services used in supermarkets, by retailer where the most is spent with in a typical month, August 2018

Three quarters have used an in-store service in the past year

Figure 59: Services used in supermarkets in the past year, August 2018

**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 - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Satisfaction with the Grocery Shopping Experience

Just over a third say they are very satisfied with their retailer of choice

Figure 60: Satisfaction with grocery retailer where the most is spent in a typical month, August 2018

Scope to give more information about where products are sourced

Figure 61: Key drivers of overall satisfaction with grocery retailers, August 2018

Retailer comparison

Figure 62: Overall satisfaction with the retailer where the most is spent in a typical month, August 2018

Figure 63: Satisfaction with select factors at the retailer where the most is spent in a typical month, August 2018

Figure 64: Satisfaction with select factors at the retailer where the most is spent in a typical month, August 2018

Key Driver Analysis: Methodology

Figure 65: Overall satisfaction with grocery retailers – Key driver output, August 2018

Attitudes towards Fresh Foods, Food Waste and Plastics

Most feel fresh is the most important consideration when choosing where to shop

Figure 66: Attitudes towards fresh foods in supermarkets, August 2018

Figure 67: Agreement with attitudes towards fresh foods in supermarkets, by channel where the most is spent in a typical month, August 2018

Vast majority feel food waste is an important concern

Figure 68: Attitudes towards food waste in supermarkets, August 2018

Grocers should be leading on plastic reduction and education

Figure 69: Attitudes towards plastics and packaging at grocery retailers, August 2018

Leading Retailers – What You Need to Know

Morrisons posts strongest growth in 2017

Sainsbury's and Asda will push Tesco, but it retains its leading market share

Tesco also the market leader online

Aldi and Lidl still have the edge on value-for-money perceptions

Leading Grocery Retailers – Key Metrics

Sales

Figure 70: Leading grocery retailers, net sales, 2013-17

Stores

Figure 71: Leading grocery retailers: Store numbers, 2013-17

Figure 72: Leading grocery retailers: annual sales per outlet, 2013-17

Sales areas and densities

Figure 73: Leading grocery retailers: total sales area, 2013-17

Figure 74: Leading grocery retailers: annual sales per sq m, 2013-17

Operating profits and margins

Figure 75: Leading grocery retailers: operating profits, 2013-17

Figure 76: Leading grocery retailers: operating margins, 2013-17

Market Share

Tesco remains the market leader...

**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 - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 77: Leading grocery retailers: share of all grocery retail sales, 2017

...but Sainsbury's plus Asda would create a challenge

Figure 78: Leading grocery retailers: share of all grocery retail sales, 2013-18

A note on our market share

Online

Around half of consumers do some online grocery shopping

Figure 79: Usage of online grocery shopping, December 2017

Online grocery only accounts for 6% of sector sales

Figure 80: Estimated breakdown of sector sales, by channel, 2012-18

The in-store experience matters

Figure 81: Why users shop online for groceries, December 2017

Same-day delivery comes at a cost

Figure 82: Attitudes towards same-day delivery services, December 2017

Tesco is losing market share

Figure 83: Leading online grocery retailers' estimated market shares, 2017

Space Allocation Summary

Summary data and classifications

Figure 84: Food, non-food standard classifications, 2018

Convenience comparison overview

Figure 85: UK leading food retailers' hypermarket store format: Convenience comparison overview split, November 2018

Figure 86: UK leading food retailers' superstore format: Convenience comparison overview split, November 2018

Figure 87: UK leading food retailers' smaller supermarkets and discounters: Convenience comparison overview split, November 2018

Detailed convenience comparison split

Figure 88: UK leading food retailers' hypermarket store format: Convenience comparison detailed split, November 2018

Figure 89: UK leading food retailers' superstore format: Convenience comparison detailed split, November 2018

Figure 90: UK leading food retailers' smaller supermarkets and discounters: Convenience comparison detailed split, November 2018

Food and drink categories split

Figure 91: Waitrose, Finchley Road, London, Sushi Daily, November 2018

Figure 92: UK leading food retailers: food and drink categories as a percentage of total space allocated to food and drink, November 2018

Retail Product Mix

Figure 93: Leading food retailers, estimated Sales Mix, 2017/18

Figure 94: Leading food retailers: Category sales as % total sales, 2017

Figure 95: Leading food retailers, Sales density by broad category, 2017

Figure 96: Leading food retailers: Estimated share of key product markets, 2017

Innovation and Launch Activity

Extended non-grocery offering to encourage consumers to visit supermarkets

Tapping into consumer demand for locally produced food

Helping customers make healthier food choices when grocery shopping in-store

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 - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

- Eco-conscious grocery shopping
- Food-to-go experiences
- E-bike grocery home delivery service
- Speeding up the supermarket checkout process

Advertising and Marketing Activity

Total sector advertising down 8.2% year on year in 2017

Figure 97: Recorded above-the-line, online display and direct mail total advertising expenditure by UK supermarket and online grocers, 2014-18*

Tesco ramps up advertising spend in 2017

Figure 98: Recorded above-the-line, online display and direct mail total advertising expenditure, by leading UK supermarket and online grocers, 2014-17

Advertising spend peaks around key seasonal events in the retail calendar

Figure 99: Recorded above-the-line, online display and direct mail total advertising expenditure by UK supermarket and online grocers, by month, 2016 and 2017

TV grabs the biggest share of advertising expenditure

Figure 100: Percentage media type split of recorded above-the-line, online display and direct mail total advertising expenditure by UK supermarkets and online grocers, 2014-18*

What we've seen so far in 2018

Nielsen Ad Intel coverage

Brand Research

Brand map

Figure 101: Attitudes towards and usage of selected brands, October 2018

Key brand metrics

Figure 102: Key metrics for selected brands, October 2018

Brand attitudes: Aldi and Lidl's image highly associated with good value

Figure 103: Attitudes, by brand, October 2018

Brand personality: Co-op moving away from boring sentiment

Figure 104: Brand personality – Macro image, October 2018

Aldi, Lidl and Iceland still regarded as somewhat basic

Brand analysis

Another good year for Tesco

Sainsbury's/Asda potential branding dilemma

Asda showing signs of recovery

Morrisons' accessibility is improving

Aldi is positively endorsed

The Co-op's brand image overhaul is working

Lidl still marginally behind Aldi

M&S Simply Food as stylish as ever

Iceland pushing eco-credentials

Exclusivity helps Waitrose stand out

Ocado is highly recommended

Amazon widely accessible

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 - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Aldi

What we think

Encouraging 'one-stop shopping'

Launching in Italy

Growing harmonisation

Company background

Company performance

Figure 106: Aldi: estimated group financial performance, 2013-17

Figure 107: Aldi: Outlet data, 2013-17

Retail offering

Asda Group

What we think

Sainsbury's merger: not the end for the Asda brand but is it good for Sainsbury's?

Abandoning price guarantee shouldn't impact perceptions of competitiveness

A greater focus on sustainability

More flexible on customers' specific needs

Digital offer refinements

Company background

Company performance

Figure 108: Asda Group Ltd: Group financial performance, 2013-17

Figure 109: Asda Stores Ltd: Breakdown of revenue between sale of goods and fuel, 2013-17

Figure 110: Asda Group Ltd: Outlet data, 2013-17

Figure 111: Asda Group Ltd: Outlets, by type, 2017/18

Retail offering

The Co-operative Food

What we think

Further move into wholesale brings scale

Facing a challenge in its traditional territory

Local sourcing

Growing closer to the community

Company background

Company performance

Figure 112: The Co-operative Food: Group financial performance, 2013/14-2017/18

Figure 113: The Co-operative Food: Outlet data, 2013/14-2017/18

Retail offering

What we think

New-generation high street stores show above-average performance

Swooping on vacant property to expand Food Warehouse format

**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 - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Reaching out to new customers

- Partnership with JD.com to launch an online flagship store in China
- Looking to satisfy demand for vegetarian and vegan options
- Awardwinning Luxury range helping change perceptions of the brand
- Reducing plastic usage
- Bans palm oil from its own-brand foods in UK first

Company background

Company performance

Figure 114: Iceland Foods Ltd: UK financial performance, 2013/14-2017/18

Figure 115: Iceland Foods Ltd: UK outlet data, 2013/14-2017/18

Retail offering

J Sainsbury (UK)

What we think

- 'Combination' with Asda has potential to transform the business
- Beauty and clothing sectors targeted for expansion
- Improving payment options to reduce checkout queues
- Delivery enhancements help to refine online offer
- Expanding reach
- More reasons to shop in-store
- Taking full control of Nectar opens up possibilities

Company background

Company performance

Figure 116: J Sainsbury (UK): Group financial performance, 2013/14-2017/18

Figure 117: J Sainsbury (UK): Outlet data, 2013/14-2017/18

Retail offering

Marks & Spencer (UK food)

What we think

- Digital first strategy
- M&S and Decoded open data science academy
- Social-first video content
- Responding to the increasing demand for convenience

Company background

Company performance

Figure 118: Marks & Spencer (UK food): Group sales performance, 2013/14-2017/18

Figure 119: Marks & Spencer (UK Food): food outlets, by format, 2013/14-2017/18

Figure 120: Marks & Spencer (UK food): Outlet data, 2013/14-2017/18

Retail offering

Ocado Group

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 - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

What we think

Sobeys deal

Kroger deal

War on plastics

Food redistribution strategy

Company background

Company performance

Figure 121: Ocado Group plc: Group financial performance, 2012/13-2016/17

Figure 122: Ocado Group plc: Key performance metrics, 2013/14-2017/18

Retail offering

Schwarz Group

What we think

Tight controls the key

Problems in fresh foods

Lessons from the UK

Online

Where next?

Company background

Company performance

Figure 123: Schwarz Group: Group financial performance, 2013/14-2017/18

Figure 124: Schwarz Group: Outlet data, 2013/14-2017/18

Retail offering

Spar International

What we think

Focused expansion of ultra-convenient stores in high-footfall locations

Targeting higher-spending customers with new Market fascia

Online shopping platforms launched in Austria, Slovenia, France and Russia

One-click payment solutions to skip the checkout queue

Capitalising on wellbeing trend

Enhanced in-store shopping environment

Reducing the impact of the business on the environment

Company background

Company performance

Figure 125: Spar International: Western Europe and Central & Eastern Europe retail sales, by country, 2013-17

Figure 126: Spar International: Western Europe and Central & Eastern Europe stores, by country, 2013-17

Figure 127: Spar International: Western Europe and Central & Eastern Europe retail sales area, 2013-17

Retail offering

Tesco

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 - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Recent performance

Strategy

Cutting costs

Looking for growth – Booker

Cutting back on general merchandise

Discounting and Jack's

So what could go wrong?

Where next?

Company background

Company performance

Figure 128: Tesco: Like-for-like growth, by UK format, Q1 2014/15-Q2 2018/19

Figure 130: Tesco Plc: Group financial performance, 2013/14-2017/18

Figure 131: Tesco Plc: Outlet data, 2013/14-2017/18

Retail offering

Tesco Plc

What we think

Recent performance

Strategy

Cutting costs

Looking for growth - Booker

Cutting back on general merchandise

Discounting and Jack's

So what could go wrong?

Where next?

Company background

Company performance

Figure 132: Tesco: Like-for-like growth by UK format, 2014/15-2018/19

Figure 133: Tesco Central Europe and Asia, like-for-like growth, 2016/17-2018/19

Figure 134: Tesco Plc: Group financial performance, 2013/14-2017/18

Figure 135: Tesco Plc: Outlet data, 2013/14-2017/18

Retail offering

Waitrose & Partners

What we think

All in for online

Improving the in-store experience

C-store sector looks a struggle

Environment and plastics a key focus of change

Health and wellbeing takes centre stage

Company background

**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 - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Company performance

Figure 136: Waitrose: Group financial performance, 2013/14-2017/18

Figure 137: Waitrose: Outlet data, 2013/14-2017/18

Retail offering

Wm Morrison Group

What we think

Fresh Look store makeover driving supermarket sales growth

Morrisons.com expands online delivery catchment

Wholesale extending the reach of Morrisons and making the brand accessible to more consumers

Voice-enabled shopping through Alexa

Tapping into meat-free tastes

Expanded non-food product offering

War on plastic

Preparing for Brexit

Company background

Company performance

Figure 138: Wm Morrison Group: Group financial performance, 2013/14-2017/18

Figure 139: Wm Morrison Group: Outlet data, 2013/14-2017/18

Retail offering

Appendix – Data Sources, Abbreviations and Supporting Information

Data sources

Financial definitions

Consumer research methodology

Abbreviations

Appendix – Key Driver Analysis

Interpretation of results

Figure 140: Overall satisfaction with grocery retailers – Key driver output, July 2018

Figure 141: Satisfaction with grocery retailers, July 2018

Appendix – Market Size and Forecast

Forecast methodology

**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