

Supermarkets - Europe - November 2018

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“Mintel’s report on supermarkets in Europe paints a picture of a sector struggling with the problems of maturity. There is much less scope for new store development in Western Europe, while competition is increasing. There is some scope for expansion in Eastern Europe and Russia, but in the west strategies are increasingly defensive.”

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

This report looks at the following areas:

This report focusses on the five major European economies and their leading food retailers. In total we estimate that these five countries account for two-thirds of all food retailers’ sales in Europe (excluding Russia).

In the European Summary we widen the scope of the report and look at the key statistics and the key players from other countries too. However, it is still the major retailers from the big five economies, but especially the UK, France and Germany, that dominate. One has to go down to number 12 in the rankings for the first retailer (Ahold Delhaize) not domiciled in one of the Big 5. More information about smaller countries can be found in the *European Retail Handbook, September 2018* and in the *European Retail Rankings*, which will be published in December 2018.

The focus of this report is supermarkets, but the market size used is for all food retailers. Supermarkets dominate food retailing across Europe taking around 87% of all food retailers’ sales. The trend towards ever larger stores is beginning to reverse in some countries, and the specialists, though not the markets, are seeing their decline bottom out and even reverse. The trend to larger supermarkets seems to be coming to an end in the more developed markets with smaller convenience stores and hard discounters growing and taking market share.

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

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

Figure 308: Spar International: Western Europe and Central & Eastern Europe stores, by country, 2013-17

Figure 309: Spar International: Western Europe and Central & Eastern Europe retail sales area, 2013-17

Retail offering

Tesco

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 310: Tesco: like-for-like growth by UK format, 2014/15-2018/19

Figure 311: Tesco Central Europe and Asia, like-for-like growth, 2016/17-2018/19

Figure 312: Tesco Plc: group financial performance, 2013/14-2017/18

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Figure 313: 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

Company performance

Figure 314: Waitrose: group financial performance, 2013/14-2017/18

Figure 315: 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 316: Wm Morrison Group: group financial performance, 2013/14-2017/18

Figure 317: Wm Morrison Group: outlet data, 2013/14-2017/18

Retail offering

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