Supermarkets: More Than Just Food Retailing - UK - November 2012

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"The dominance of the major food retailers is still developing. Their offer is being refined – both in store size and product offer. There is still scope for growth in non-foods and services and the next decade will see all the majors seek to enhance their store portfolios and the authority of their offers."

– Richard Perks, Director of Retail Research

In this report we answer the key questions:

- **Non-foods – once the driver, now where?**
- **Food – Are C-stores the future?**
- **Problem businesses – what are the lessons?**
- **Price – is it being taken out of the equation?**
- **Where next for food retailers?**

There are some tentative signs that the UK is coming out of recession, or at least that the pressure on consumers is easing. The food retailers have had a tough recession, but nothing like as bad as it might have been. The evidence of Mintel's consumer research suggests that consumers are less inclined to cut back and trade down and more inclined to start trading up again.

But the industry which emerges from recession will not be the same as the one that went in.

- The emphasis for development has shifted from large stores to small ones.
- Online is an increasingly important element of the retail proposition, not in competition with stores, but complementary to them. Growth in sales of non-foods will increasingly be concentrated online.
- Tesco and Morrisons have turned down, Sainsbury's and Asda are motoring.
- The hard discounters had a good recession, but will they do as well in an upturn?
- With just four major players, all the evidence suggests that price is being taken out of the competitive agenda and that the emphasis will be back on the basics of good retailing.

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