

## Supermarkets - Italy - November 2015

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“The leading grocery retailers continue to suffer both due to the wider economic problems within Italy holding back consumer spending, and the shift of shoppers to the discount formats.”

– Nick Carroll, Retail Analyst

This report looks at the following areas:

- Retailers need to address the rise in single person households
- Click-and-collect: A logical solution?

Italian grocery retailers have faced a tough trading environment in recent years, characterised by low turnover growth as consumers have held back spending. This has led to a period of consolidation among the leading retailers with most looking to jettison loss-making stores and many seeking the protection of a buying alliance. In such an environment the discounters have flourished, notably Lidl and Penny, which have both outperformed the market in recent years.

Our consumer data found that a majority, 56%, of Italian grocery shoppers combine a main shop with smaller top-up shops. Market leader Coop Italia remains the most popular retailer to complete a main shop with, 16% of grocery shoppers use the retailer as their primary destination. However, we found that Lidl is the most popular secondary shopping destination with 25% of grocery shoppers using the discounter as a top-up shop. This is the primary reason for Lidl's success in Italy: whilst the market leaders continue to claim more primary shops, Lidl has become the go to location for secondary shops ahead of the leading players.

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DID YOU KNOW?

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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## Issues and Insights

Retailers need to address the rise in single person households

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The implications

Click-and-collect: A logical solution?

The facts

The implications

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Kaufland

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