

Supermarkets - Europe - November 2016

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“Food retailing is going through particularly difficult times. There is deflation in most markets, which puts pressure on profitability unless there can be compensating cost savings. The hard discounters have revitalised their offer and are an increasingly powerful force in many countries.”
– **Richard Perks, Director of Retail Research**

This report looks at the following areas:

The main focus of this report is the five major European countries – France, Germany, Italy, Spain and the UK. Together they account for around 60% of all European retail sales (excluding Russia). But in the European summary we include summary data about the other leading markets in Europe, together with details about the top 60 leading food retailers across all Europe. More information about smaller countries can be found in the European Retail Handbook, September 2016 and in the European Retail Rankings, which will be published in December 2016.

The focus of this report is supermarkets, but the market size used is 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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Table of Contents

Europe – Overview

Areas covered in this Report
 Consumer research coverage
 Technical notes
 Consumer spending
 Retail sales
 Financial definitions
 Currencies
 Abbreviations
 VAT rates
 Figure 1: VAT rates around Europe, 2011-16

Executive Summary – Europe – The Market

The market
 Sector size and forecast
 Figure 2: Europe: Food retailers' sales, excl. VAT, 2011-16
 Figure 3: Europe: Food retailers' forecast sales, excl. VAT, 2016-21
 Consumer spending
 Figure 4: Europe: Consumer spending on food, drink and tobacco, inc VAT, 2011-15
 Figure 5: Europe: Consumer spending on health and beauty products, inc. VAT, 2011-15
 Inflation
 Figure 6: Europe: Harmonised index of food and non-alcoholic beverages prices, annual % change, 2011-15
 Figure 7: Europe: Harmonised index of alcohol and tobacco prices, annual % change, 2011-15
 Online
 Figure 8: Europe online food retailing: Usage and share of sales, 2015
 Leading players
 Figure 9: Europe: Leading food retailers, Sales, 2013/14-2015/16
 Figure 10: Europe: Leading food retailers, Outlets, 2013/14-2015/16
 Figure 11: Europe: Leading food retailers, Sales per outlet, 2013/14-2015/16
 Market shares
 Figure 12: Europe: Top 20 food retailers relative to all food retailers sales, 2013/14-2015/16
 What we think
 Food shopping habits changing
 Discounters have gained strength
 C-stores are a growth area
 UK leads the way online
 Where next?

Executive Summary – Europe – The Consumer

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Supermarkets - Europe - November 2016

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Frequency of grocery shopping

Figure 13: Europe: Frequency of grocery shopping, average times per week, September 2016

How they shop – In-store versus online

Figure 14: Continental Europe: In-store vs online grocery shopping, main weekly/monthly shop, September 2016

Figure 15: Continental Europe: In-store vs online grocery shopping, smaller/top-up shops, September 2016

Types of retailer used

Figure 16: Europe: Food retailers used in the last six months, Q3 2016

Reasons for shopping at the most-used retailer

Top rank

Figure 17: Europe: Top five reasons for shopping at the retailer they spend the most with in a typical month, September 2016

Any rank

Figure 18: Europe: Reasons for shopping at the retailer they spend the most with in a typical month, any rank, September 2016

Figure 19: Ranking of reasons for choosing a retailer by proportion choosing that factor, September 2016

Attitudes to grocery shopping.

Organics

Figure 20: Europe: Those agreeing that organics are worth paying more for, Q3 2016

Waste

Figure 21: Europe: Those who do not buy special offers to avoid throwing things away, Q3 2016

Market leaders

Figure 22: Europe: Most used retailer by country, % spending most there in a typical month, September 2016

Executive Summary – Europe – Innovation and Launch Activity

Vending machine for round-the-clock grocery shopping

Helping consumers shop more efficiently for groceries

VR in the supermarket

Fresh produce grown on-site

Sicilian-based grocery chain Prezzemolo & Vitale opens its first store in London

Simply offers personal assistant service for the blind

Edeka launches new cooking channel on YouTube

Aldi launches 'well-being portal' online

Click-and-collect for consumers who are travelling by boat

Carrefour Market trials one-hour delivery system

France

Overview

What you need to know

Areas covered in this Report

Executive Summary

The market

Spending and inflation

Figure 23: France: Grocery market size segmentation, 2015

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Channels of distribution

Figure 24: France: Estimated distribution of spending on food and drink, 2015

Sector size and forecast

Figure 25: France: Retail sales by format, annual % growth in value sales (incl. VAT), 2011-15

Leading players

Key metrics

Market shares

Figure 26: France: Leading grocers' shares of all food retailers sales, 2015

Online

Figure 27: France: Leading grocery retailers' turnover from Drive services, 2015

The consumer

Who shops for groceries

How they shop for groceries

Figure 28: France: Reasons for shopping for groceries online, Q1 2016

Where they shop for groceries

Figure 29: France: Grocery retailer they spend the most with in a typical month, September 2016

Reasons for shopping at preferred retailer

Figure 30: France: Reasons for shopping at the retailer they spend the most with in a typical month, September 2016

What we think

Issues and Insights

A changing retail environment

The facts

The implications

Ethical shopping

The facts

The implications

The Market – What You Need to Know

A weak economy

Spending on food and drink non-discretionary

Price holding back value growth

Grocers are the primary channel for buying food and drink

Total retail sales recovered in 2015, further growth forecast in 2016

Spending and Inflation

Economic growth is sluggish

Deflation and price war holding back spending on groceries

Figure 31: France: Consumer spending on food, drink and tobacco (incl. VAT), 2011-16

Inflation

Figure 32: France: Consumer prices of food and drink, annual % change, 2011-15

Figure 33: France: Consumer prices of food and drink, annual % change, March 2015-Sept 2016

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Channels of distribution

Figure 34: France: Proportion of consumers shopping for groceries at various types of shop in the last six months, Q1 2016

Grocers dominate

Specialists a vital part of French daily life

Other players' share is small

Figure 35: France: Estimated distribution of spending on food and drink, 2015

Sector Size and Forecast

Total retail sales recovered in 2015, further growth forecast in 2016

Specialists outpacing the grocers

Figure 36: France: Food retailers' sales (excl. VAT), 2012-16

But smaller stores outperforming larger ones

Figure 37: France: Retail sales by format, annual % growth in value sales (incl. VAT), 2011-15

Decline in non-food sales at the grocers

Figure 38: France: Sales in supermarkets and hypermarkets by type of product, January 2011-November 2014

Figure 39: France: Food retailers' sales forecast (excl. VAT), 2016-21

Leading Players – What You Need to Know

Retailers evolving to meet demands of changing behaviour

Little change in overall market shares, but variation by store type

Online dominated by Drive services

Competition hotting up in Paris for rapid home delivery

Leading Players

A multi-format sector to serve a changing market

Hypermarkets in decline...

...as c-stores and small supermarkets thrive

Discounters

Figure 40: France: Leading grocers, by sales (excl. VAT), 2013-15

Figure 41: France: Leading grocers, outlet numbers, 2013-15

Figure 42: France: Leading grocers, sales per outlet, 2013-15

Market Shares

Figure 43: France: Leading grocers' shares of all food retailers sales, 2013-15

Online

Online sales in France

Shopping online for food

Figure 44: France: Percentage of all individuals purchasing online in the past 12 months, 2011-15

Figure 45: France: Online purchasing, 2011-15

Drive dominates e-commerce in groceries

Figure 46: France: Leading grocery retailers' turnover from drive services, 2015

Figure 47: France: Leading grocery retailers' drive locations, January 2016

Figure 48: France: Grocery home delivery services, 2016

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The Consumer – What You Need To Know

Shopping still mainly women's work

Top-up shopping widespread

Online popular for 20% of people

Money concerns influence shopping behaviour

Ethical/organic/green shopping on the up

Leclerc and Carrefour the most popular grocers

Convenience more important than price

Important factors vary by retailer

Who Shops for Groceries

Two-thirds of adults are responsible for grocery shopping

Figure 49: France: Who is responsible for grocery shopping, September 2016

Men doing more shopping

Figure 50: France: Who is responsible for grocery shopping, by gender, September 2016

How They Shop for Groceries

Top up shopping popular

Figure 51: France: Frequency of grocery shopping, September 2016

In-store versus online

Figure 52: France: In-store vs online grocery shopping, September 2016

Figure 53: France: Frequency of shopping online for groceries in the last six months, Q1 2016

Figure 54: France: Reasons for shopping for groceries online, Q1 2016

Figure 55: France: Reasons for not shopping for groceries online, Q1 2016

Figure 56: France: Grocery purchasing services used in the past/interested in using in the future, Q1 2016

Shopping behaviours

Figure 57: France: Grocery shopping habits, Q3 2016

Ethical/organic/green shopping on the up

Figure 58: France: Grocery shopping habits, Q4 2015 and Q3 2016

Where They Shop for Groceries

A quarter of primary shoppers use Leclerc

Figure 59: France: Grocery retailer they spend the most with in a typical month, September 2016

Figure 60: France: Grocery retailer they spend the most with in a typical month, by average age and income, September 2016

Reasons for Shopping at Most-Used Retailer

Figure 61: France: Reasons for shopping at the retailer they spend the most with in a typical month (net any rank), September 2016

Figure 62: France: Reasons for shopping at the retailer they spend the most with in a typical month, September 2016

Figure 63: France: Agreement that convenience is a reason for shopping at a retailer (net any rank), by retailer, September 2016

Figure 64: France: Agreement that price is a reason for shopping at a retailer (net any rank), by retailer, September 2016

Figure 65: France: Agreement that items being in stock is a reason for shopping at a retailer (net any rank), by retailer, September 2016

Figure 66: France: Agreement that a good range of non-food products is a reason for shopping at a retailer (net any rank), by retailer, September 2016

Figure 67: France: Agreement that friendly/helpful staff are a reason for shopping at a retailer (net any rank), by retailer, September 2016

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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

Consumer spending

Figure 68: Germany: Annual % change in consumer spending (incl. VAT), 2012-16

Inflation

Figure 69: Germany: Consumer prices of food and drink, annual % change, January 2015-September 2016

Channels of distribution

Sector size and forecast

Leading players

Key metrics

Market shares

Figure 70: Germany: Leading grocers' shares of all food retailers sales, 2015

Online

The consumer

Who shops for groceries

Figure 71: Germany: Who is responsible for grocery shopping, September 2016

How they shop for groceries

Figure 72: Germany: Frequency of grocery shopping, September 2016

Where they shop for groceries

Figure 73: Germany: Grocery retailer they spend the most with in a typical month, September 2016

Reasons for shopping at most-used retailer

Figure 74: Germany: Reasons for shopping at the retailer they spend the most with in a typical month, September 2016

What we think

Issues and Insights

Could shrinking store estates provide impetus for e-commerce?

The facts

The implications

What now for Real?

The facts

The implications

The battle for Kaiser's Tengelmann

The facts

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The implications

The Market – What You Need to Know

Growth in spending slows

Inflation continues to fall

Spending split between supermarkets and discounters

Grocers, the driver of food retailers' growth

Low but steady growth forecast

Spending and Inflation

German growth driven by consumption

Falling inflation slows growth in spending on food

Figure 75: Germany: Consumer spending on food, drink and tobacco (incl. VAT), 2011-16

Inflation continues to fall

Figure 76: Germany: Consumer prices of food and drink, annual % change, 2011-15

Figure 77: Germany: Consumer prices of food and drink, annual % change, January 2015-September 2016

Channels of distribution

Figure 78: Germany: Estimated distribution of spending on food, beverages and tobacco, 2015

Sector Size and Forecast

Food retailers grow in line with all retail sales

Grocers still taking spending away from specialists

Figure 79: Germany: Food retailers' sales (excl. VAT), 2011-16

Figure 80: Germany: Food retailers' sales forecast (excl. VAT), 2016-21

Leading Players – What You Need to Know

Supermarkets' share of leading retailers' sales stabilises

Edeka leads

Lidl narrows the gap on Aldi

Rate of store closures accelerates

Little change in market shares

Online remains small

Leading Players

Little change in share by operation

Figure 81: Germany: Share of leading 15 grocery retailers' sales, by operation type, 2013-15

Edeka, the market leader

Aldi comes together

Real continues to decline

Could the battle for Kaiser's Tengelmann be at an end?

Figure 82: Germany: Leading grocers, by sales (excl. VAT), 2013-15

Figure 83: Germany: Leading grocers, outlet numbers, 2013-15

Figure 84: Germany: Leading grocers, Sales per outlet, 2013-15

Market Shares

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Figure 85: Germany: Leading grocers' shares of all food retailers' sales, 2013-15

Online

Online sales in Germany

Shopping online for food

Figure 86: Germany: Percentage of all individuals purchasing online in the past 12 months, 2011-15

Figure 87: Germany: Percentage of all individuals that have made an online food purchase in the last 12 months, European comparisons, 2011-15

Online grocery players

Edeka introduces collection points

Lidl launches an online shop in Berlin

Rewe enhances its delivery service

Still waiting on Amazon Fresh

The Consumer – What You Need To Know

63% wholly responsible for grocery shopping

Germans prefer to shop multiple times per week

German consumers stick to what they know

Lidl, the most popular

Convenience is the most important factor

Who Shops for Groceries

More Germans take full responsibility for grocery shopping

Figure 88: Germany: Who is responsible for grocery shopping, September 2015/September 2016

Figure 89: Germany Who is responsible for grocery shopping, by age and gender, September 2016

How They Shop for Groceries

Germans prefer to shop a few times a week

Figure 90: Germany: Frequency of grocery shopping, September 2016

In-store shopping still preferred

Figure 91: Germany: In-store vs online grocery shopping, September 2016

Online more popular with the young

Figure 92: Germany: In-store vs online grocery shopping, by age, September 2016

Why they don't shop online

Figure 93: Germany: Reasons for not shopping for groceries online, Q1 2016

Why they shop online

Figure 94: Germany: Reasons for shopping for groceries online, Q1 2016

Where They Shop for Groceries

Figure 95: Germany: Grocery retailer they spend the most with in a typical month, September 2016

Shoppers increasingly spending the most at Aldi

Figure 96: Germany: Grocery retailer they spend the most with in a typical month, September 2014/2016

Edeka targets the younger shoppers at Kaiser's Tengelmann

Figure 97: Germany: Grocery retailer they spend the most with in a typical month, by average age and income, September 2016

Reasons for Shopping at the Most-Used Retailer

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Promotions are a popular attraction

Price and convenience most important factors

Figure 98: Germany: Reasons for shopping at the retailer they spend the most with in a typical month, September 2016

45-54 year olds prioritise convenience

Figure 99: Germany: Selected reasons for shopping at the retailer they spend the most with, 1st rank, by age group, September 2016

Importance of low prices

Figure 100: Germany: Importance of having the lowest prices, by retailer they spend the most with, September 2016

Lidl shoppers focus on price

Figure 101: Germany: Reasons for shopping at Lidl, net any rank percentage point difference from the overall average, September 2016

Aldi offers price and speed

Figure 102: Germany: Reasons for shopping at Aldi, net any rank percentage point difference from the overall average, September 2016

Rewe appeals on quality

Figure 103: Germany: Reasons for shopping at Rewe, net any rank percentage point difference from the overall average, September 2016

Edeka/Marktkauf maintain high standards

Figure 104: Germany: Reasons for shopping at Edeka/Marktkauf, net any rank percentage point difference from the overall average, September 2016

Kaufland offers broad range of promotions

Figure 105: Germany: Reasons for shopping at Kaufland, net any rank percentage point difference from the overall average, September 2016

Netto stands out for its loyalty scheme

Figure 106: Germany: Reasons for shopping at Netto, net any rank percentage point difference from the overall average, September 2016

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

Consumer spending

Figure 107: Italy: Annual % change in consumer spending, 2012-16

Inflation

Figure 108: Italy: Consumer prices of food and drink, annual % change, Jan 2015 – Oct 2016

Channels of distribution

Figure 109: Italy: Estimated distribution of spending on food and beverages, 2015

Sector size and forecast

Leading players

Key metrics

Market shares

Figure 110: Italy: Leading grocers' share of all food retailers' sales, 2015

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Online

The consumer

Who shops for groceries

Figure 111: Italy: Who is responsible for grocery shopping, September 2015/September 2016

How they shop for groceries

Figure 112: Italy: Frequency of grocery shopping, September 2016

Where they shop for groceries

Figure 113: Italy: Grocery retailer they spend the most with in a typical month, September 2015/ September 2016

Reasons for shopping at most-used retailer

Figure 114: Italy: Reasons for shopping at the retailer they spend the most with in a typical month, September 2016

What we think

Issues and Insights

The Italian home-grown discount sector

The facts

The implications

A changing of the guard

The facts

The implications

The Market – What You Need to Know

Consumer spending picks up

Inflation remains low

Grocers account for 76% of spending on food and drink

2015 was a better year for food retailers

Low growth forecast

Spending and Inflation

Italian economy remains weak

Consumer spending growth picks up

Figure 115: Italy: Consumer spending on food, drink and tobacco (incl. VAT), 2011-16

Inflation

Figure 116: Italy: Consumer prices of food and drink, annual % change, 2011-15

Figure 117: Italy: Consumer prices of food and drink, annual % change, January 2015-October 2016

Channels of distribution

Figure 118: Italy: Estimated distribution of spending on food and beverages, 2015

Figure 119: Italy: Estimated distribution of spending on food and beverages, 2011-15

Sector Size and Forecast

2015 was a better year for food retailers

Figure 120: Italy: Food retailers' sales (excl. VAT), 2011-16

Figure 121: Italy: Food retailers' sales forecast (excl. VAT), 2016-21

Leading Players – What You Need To Know

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Coop Italia sales stabilise

Aldi to launch in 2017

Outlet numbers continue to decline

Coop loses its market leading position

Online remains small

Leading Players

Conad takes number one position

Coop Italia sales stabilise

Esselunga focusing on price

Aldi to launch in 2017

Figure 122: Italy: Leading grocers, by sales (excl. VAT), 2013-15

Outlet numbers continue to decline

Figure 123: Italy: Leading grocers, outlet numbers, 2013-15

Figure 124: Italy: Leading grocers, sales per outlet, 2013-15

Market Shares

Figure 125: Italy: Leading grocers' shares of all food retailers' sales, 2013-15

Online

Online sales in Italy

Shopping online for food

Figure 126: Italy: Percentage of all individuals purchasing online in the past 12 months, 2011-15

Figure 127: Italy: Online purchasing in the past 12 months, European comparisons, 2015

Leading online players

The Consumer – What You Need To Know

More consumers taking responsibility for grocery shopping

Italians are regular shoppers

Coop Italia still the most popular primary shopping destination

Price and convenience the main reasons for shopping

Who Shops for Groceries

Taking on more responsibility

Italians share responsibility more than their European peers

Figure 128: Italy: Who is responsible for grocery shopping, September 2015/September 2016

25-34 year-olds take greater responsibility

Figure 129: Italy: Who is responsible for grocery shopping, by age, September 2015/September 2016

Figure 130: Italy: Who is responsible for grocery shopping, by age and gender, September 2016

How They Shop for Groceries

Italians are frequent shoppers

Figure 131: Italy: Frequency of grocery shopping, September 2016

In-store versus online

Figure 132: Italy: In-store vs online grocery shopping, September 2016

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Effort saving benefits of online shopping

Figure 133: Italy: Reasons for shopping for groceries online, Q1 2016

Italians prefer to stick to what they know

Figure 134: Italy: Reasons for not shopping for groceries online, Q1 2016

Online services struggling to convince shoppers

Figure 135: Italy: Grocery purchasing services used in the past/interested in using in the future, Q1 2016

Bargain hunting on the rise

Figure 136: Italy: Grocery shopping habits, Q3 2016

Where They Shop for Groceries

Coop Italia still the most popular grocery retailer

Figure 137: Italy: Grocery retailer they spend the most with in a typical month, September 2016

Conad Group closes the gap

Discounters capturing primary shoppers

Figure 138: Italy: Grocery retailer they spend the most with in a typical month, September 2015/ September 2016

Conad attracts the oldest shoppers

Figure 139: Italy: Grocery retailer they spend the most with in a typical month, by average age and income, September 2016

Reasons for Shopping at Most-Used Retailer

Price and convenience the main draws

Figure 140: Italy: Reasons for shopping at the retailer they spend the most with in a typical month, September 2016

Priorities driven by necessity

Figure 141: Italy: Primary reason for shopping at grocery retailers, by average age and income, September 2016

Coop Italia shoppers favour range and reliability

Figure 142: Italy: Reasons for shopping at Coop Italia, net any rank percentage point difference from the overall average, September 2016

Conad shoppers want promotions and convenience

Figure 143: Italy: Reasons for shopping at Conad, net any rank percentage point difference from the overall average, September 2016

Eurospin is all about the money

Figure 144: Italy: Reasons for shopping at Eurospin, net any rank percentage point difference from the overall average, September 2016

Lidl has a broader appeal

Figure 145: Italy: Reasons for shopping at Lidl, net any rank percentage point difference from the overall average, September 2016

Carrefour offers a fast and friendly shopping experience

Figure 146: Italy: Reasons for shopping at Carrefour, net any rank percentage point difference from the overall average, September 2016

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Data sources

Spain

Overview

What you need to know

Areas covered in this Report

Executive Summary

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Report Price: £2895.00 | \$3614.41 | €3416.10

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

The market

Consumer spending

Figure 147: Spain: Annual % change in consumer spending, 2011-15

Inflation

Figure 148: Spain: Consumer prices of food and drink, annual % change, April 2015 – September 2016

Channels of distribution

Figure 149: Spain: Estimated distribution of spending on food, drink and tobacco, 2015

Sector size and forecast

Leading players

Key metrics

Market shares

Figure 150: Spain: Leading grocers' shares of all food retailers' sales, 2015

Online

Figure 151: Spain: Percentage of individuals buying online in the past 12 months, 2015

The consumer

Who shops for groceries

Figure 152: Spain: Who is responsible for grocery shopping, September 2016

How they shop for groceries

Figure 153: Spain: Frequency of grocery shopping, September 2016

Where they shop for groceries

Figure 154: Spain: Grocery retailer they spend the most with in a typical month, September 2016

Reasons for shopping at most-used retailer

What we think

Issues and Insights

Strengthening multichannel offer

The facts

The implications

Tapping into changing shopping habits

The facts

The implications

The Market – What You Need to Know

Consumer spending boosted by economic recovery

Food price inflation continues to rise

Grocers account for more than two-thirds of spending

Retail sales growth at food specialists set to slow

Spending and Inflation

The economy in Spain

Consumer spending on food and drink

Figure 155: Spain: Consumer spending on food, drink and tobacco (incl. VAT), 2011-16

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Inflation

Figure 156: Spain: Consumer prices of food and drink, annual % change, 2011-15

Figure 157: Spain: Consumer prices of food and drink, annual % change, April 2015 – September 2016

Channels of distribution

Grocers account for 71% of food and drink market

Figure 158: Spain: Estimated distribution of spending on food, drink and tobacco, 2015

Sector Size and Forecast

Growth of food specialists outpacing grocers

Figure 159: Spain: Food retailers' sales (excl. VAT), 2012-16

Figure 160: Spain: Forecast food retailers' sales (excl. VAT), 2016-21

Leading Players – What You Need to Know

Mercadona continues to dominate

Smaller, more frequent grocery shopping drives growth in convenience operations

Discounters grow market share

Online remains untapped

Leading Players

Mercadona maintains market leading position

Retailers grow convenience operations

Discounters continue to strengthen their position

Figure 161: Spain: Leading grocers, by sales (excl. VAT), 2013-15

Figure 162: Spain: Leading grocers, outlet numbers, 2013-15

Figure 163: Spain: Leading grocers, sales per outlet, 2013-15

Market Shares

Consolidation continues

Figure 164: Spain: Leading grocers' shares of all food retailers sales, 2013-15

Online

Online sales in Spain

Figure 165: Spain: Estimated online sales by product category, 2015

Shopping online for food

Figure 166: Spain: Percentage of all individuals purchasing online in the past 12 months, 2011-15

Figure 167: Spain: Online purchasing, 2011-15

Figure 168: Europe: Percentage of all individuals purchasing online in the past 12 months, 2015

Leading players in online grocery retailing

Amazon growing its fresh grocery offer

The Consumer – What You Need To Know

Responsibility falls on female consumers

Two-thirds of people shop more than once a week

Consumers still reluctant to embrace online

Mercadona holds its dominant position

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Who Shops for Groceries

A rise in the number of people responsible for food shopping

Figure 169: Spain: Who is responsible for grocery shopping, September 2016

Figure 170: Spain: Who is responsible for grocery shopping, September 2015 and September 2016

Two-thirds of women take responsibility for grocery shopping

Figure 171: Spain: Who is responsible for grocery shopping, by gender, September 2016

The gender gap most pronounced amongst older consumers

Figure 172: Spain: Who is responsible for grocery shopping, by age and gender, September 2016

How They Shop for Groceries

Two-thirds of consumers shop more than once a week

Figure 173: Spain: Frequency of grocery shopping, September 2016

In-store vs online

Figure 174: Spain: In store vs online grocery shopping, September 2016

Changing grocery shopping behaviour

Figure 175: Spain: Grocery shopping habits, by gender and age, Q3 2016

Reasons for not shopping online

Figure 176: Spain: Grocery shopping habits, by gender and age, Q1 2016

Where They Shop for Groceries

Mercadona the go-to-retailer for a third of consumers

Figure 177: Spain: Grocery retailer they spend the most with in a typical month, September 2015-16

Primary retailer impacted by financial situation

Figure 178: Spain: Grocery retailer they spend the most with in a typical month, by average age and income, September 2016

Reasons for Shopping at Most-Used Retailer

Convenience influences where consumers choose to shop

Figure 179: Spain: Reasons for shopping at the retailer they spend the most within a typical month (net any rank), September 2016

Figure 180: Spain: Reasons for shopping at the retailer they spend the most with in a typical month, September 2016

Dia and Carrefour's loyalty cards attract shoppers

Figure 181: Spain: Reasons for shopping at the retailer they spend the most with in a typical month (net any rank), by retailer, September 2016

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Data sources

UK

Overview

What you need to know

Products covered in this Report

Executive Summary

The market

Confidence: bouncing back following Brexit

Record deflation in the food categories but price rises imminent

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Figure 182: Food and drink inflation, 2011-16

Consumer spending on food takes a dive

Figure 183: Annual % change in the value, volume and prices in the food category, 2011-15

Supermarkets' sales falling but positive growth on the horizon

Figure 184: Supermarkets market size (inc. VAT), 2011-21

Increased choice has chipped away at sector share

Figure 185: Estimated breakdown of sector sales, by channel, 2011-16

Leading players

The big four continue to lose market share

Figure 186: Leading grocery retailers: Share of sector sales, 2015

Continued growth in online could hurt supermarkets

Figure 187: Leading online grocery retailers' estimated market shares (excluding VAT), 2015

Morrisons and Waitrose lead on fresh food allocation

Figure 188: UK leading food retailers: food and drink categories as a percentage of total space allocated to food and drink, October 2016

Improved levels of trust at Tesco, Sainsbury's and Morrisons

Figure 189: Attitudes towards and usage of selected brands, October and January 2016

The consumer

Most shop multiple times per week

Figure 190: Frequency of grocery shopping, September 2016

Most still spend the most in supermarkets

Figure 191: Formats where the most money is spent in a typical month, September 2016

Tesco the dominant player

Figure 192: Primary and secondary usage by grocery, retailer used, September 2016

Why they shop in supermarkets...

Figure 193: Why they spend the most in supermarkets, September 2016

...and why they don't

Figure 194: Why they do not spend the most in supermarkets, September 2016

Availability a core concern for supermarket shoppers

Figure 195: Areas that supermarkets shoppers would like to see improved, any rank, September 2016

Shoppers in favour of the move to EDLP

Figure 196: Attitudes towards pricing and promotions, September 2016

Own-brand the differentiator

Figure 197: Attitudes towards range reduction and own-brand, September 2016

Brexit is likely to place greater scrutiny on sourcing

Figure 198: Attitudes towards sourcing and the effect of Brexit, September 2016

What we think

Issues and Insights

Will Brexit cause a greater focus on sourcing?

The facts

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The implications

Own-brand: more important than ever?

The facts

The implications

Non-foods: an increasingly competitive battleground

The facts

The implications

The Market – What You Need to Know

Confidence rising steadily

Deflation persists but price rises on the horizon

Consumer spending on food and drink falls in 2015

Supermarkets sector continues to see sales decline

Supermarkets have lost sector share consistently since 2011

Market Drivers

Consumer confidence rises steadily

Figure 199: Consumer confidence: Current financial situation vs sentiment for the coming year, January 2014-September 2016

Inflation remains low

Figure 200: Food and drink inflation, 2011-16

Growth in the number of convenience stores

Figure 201: Store numbers of the leading convenience operators, by operation, 2011-15

Growth in other channels

Figure 202: Market size for online grocery retailing and discounter grocers, 2011-16

Consumers prepared for increasing cost of living

Figure 203: Consumer views on the impact of Brexit, July 2016

Private renting increases

Figure 204: UK household tenure status, 2011-15

Consumer Spending on Food and Drink

Figure 205: Consumer spending on core food and drink categories, 2011-16

Spending on food

Figure 206: Annual % change in the value, volume and prices in the food category, 2011-15

How food spending breaks down

Figure 207: Composition of consumer spending on food, categories as a % of total spending, 2012-15

Spending on non-alcoholic drinks

Figure 208: Annual % change in the value, volume and prices in the non-alcoholic beverages category, 2011-15

Spending on alcoholic drinks

Figure 209: Annual % change in the value, volume and prices in the alcoholic beverages category, 2011-15

Figure 210: Composition of consumer spending on alcoholic drinks, categories as a % of total spending, 2012-15

Sector Size and Forecast

Sector sales slowed by deflation

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Figure 211: All food retail sales (inc. VAT), 2011-21

Figure 212: All food retail sales, 2011-21

Supermarkets' sales fall once more in 2015

Figure 213: Supermarkets' market size and forecast (inc. VAT), 2011-21

Figure 214: Supermarkets: market size and forecast (inc. VAT), 2011-21

Supermarket share predicted to continue to fall

Figure 215: Percentage of grocer sector sales accounted for by supermarkets, 2011-21

The impact of the EU referendum vote on the grocery sector

The grocery sector has been resilient in previous slowdowns

Figure 216: Alternative market scenarios for the post-Brexit grocery sector, at current prices, 2016-21

Figure 217: Detailed post-Brexit scenarios for the grocery sector, at current prices, 2016-21

The grocery sector is more insulated from economic slowdown than other sectors

The effect on supermarkets

Same again?

Forecast methodology

Changes in methodology

Channels of Distribution

Despite falling share, supermarkets remain the dominant force

Figure 218: Estimated channels of distribution for grocery retail sales, 2015

Figure 219: Estimated breakdown of sector sales, by channel, 2011-16

The Consumer – What You Need to Know

The majority shop multiple times per week

Many still spend the most in supermarkets

Tesco is the dominant player

Historical strengths remain but increased choice is hurting supermarkets

Availability a core concern for supermarket shoppers

Shoppers in favour of the move to EDLP

Brexit is likely to place greater scrutiny on sourcing

How They Shop

Who does the shopping

Figure 220: Who is responsible for grocery shopping, September 2016

Most combine a main shop with a top-up

Figure 221: Grocery shopping behaviours, September 2016

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

Figure 222: Grocery shopping behaviours, by age, September 2016

Frequency of shop

Figure 223: Frequency of grocery shopping, September 2016

Changing definition of what constitutes a main shop

Figure 224: Frequency of shop, by shopping behaviour, September 2016

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Age affects shopping frequency...

Figure 225: Frequency of shop, by age, September 2016

...as does the area lived in

Figure 226: Frequency of shop, by area lived in, September 2016

Where They Shop

Despite falling market share the majority spend the most in supermarkets

Figure 227: Formats where the most money is spent in a typical month, September 2016

Younger consumers more likely to look elsewhere

Figure 228: Formats where the most money is spent in a typical month, by age, September 2016

Discounters have made up the most ground in the North

Figure 229: Format where the most money is spent, by region, September 2016

Top-ups taking away market share

Figure 230: Formats where the most money is spent in a typical month, by frequency of shop, September 2016

Which Retailers Do They Use?

Tesco out in front

Figure 231: Total grocery retailer usage, September 2016

Tesco also grabs the most primary shops

Figure 232: Primary and secondary usage, by grocery retailer used, September 2016

Main shop trend: Asda losing shoppers fast

Figure 233: Retailer spent most money with, trend data, 2013-16

Secondary shop trend: small changes

Figure 234: Secondary usage, by grocery retailer used, 2015 and 2016

Discounters taking more secondary shops from Asda and Morrisons

Figure 235: Where leading players' primary shoppers also shop, September 2016

Shopper profiles: primary shoppers

Figure 236: Retailers used for primary shops, by average age and socio-economic group, September 2016

Figure 237: Retailers' primary shoppers, by region lived in, September 2016

Shopper profiles: secondary shoppers

Figure 238: Retailers used for secondary shops, by average age and socio-economic group, September 2016

Figure 239: Retailers used for secondary shops, by region lived in, September 2016

Figure 240: Retailers used for secondary shops, by region lived in, September 2016

Repertoire of secondary shops

Figure 241: Number of retailers used for secondary shops, September 2016

Why They Do (and Do Not) Spend the Most in Supermarkets

Historical strengths ring true for supermarkets

Figure 242: Why they spend the most in supermarkets, September 2016

Key reasons by age

Figure 243: Leading reasons why they spend the most in supermarkets, by age, September 2016

Reasons by retailer

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Figure 244: Reasons for spending the most in a supermarket in a typical month, by retailer where the most is spent in a typical month, September 2016

Increased choices are driving some away

Figure 245: Why they do not spend the most in supermarkets, September 2016

Those living in urban areas more likely to have an alternative

Figure 246: Why they do not spend the most in supermarkets, by area lived in, September 2016

What They Would Change About Where They Shop

Availability a concern

Figure 247: Areas that grocery shoppers would like to see improved, any rank, September 2016

Figure 248: Areas that grocery shoppers would like to see improved, by rank, September 2016

Retailer-specific concerns

Tesco: Quality concerns

Figure 249: Overall ranking of factors supermarket shoppers would like to see improved, by total and by Tesco shoppers, September 2016

Figure 250: What Tesco shoppers would improve, any rank, September 2016

Sainsbury's: Range a positive, but more information is needed

Figure 251: Overall ranking of factors supermarket shoppers would like to see improved, by total and by Sainsbury's shoppers, September 2016

Figure 252: What Sainsbury's shoppers would improve, any rank, September 2016

Asda: A good deal of change needed

Figure 253: Overall ranking of factors supermarket shoppers would like to see improved, by total and by Asda shoppers, September 2016

Figure 254: What Asda shoppers would improve, any rank, September 2016

Morrisons: Range of non-foods singled out

Figure 255: Overall ranking of factors supermarket shoppers would like to see improved, by total and by Morrisons shoppers, September 2016

Figure 256: What Morrisons shoppers would improve, any rank, September 2016

Aldi: Quality of goods a real strength

Figure 257: Overall ranking of factors supermarket shoppers would like to see improved, by total and by Aldi shoppers, September 2016

Figure 258: What Aldi shoppers would improve, any rank, September 2016

Attitudes Towards Pricing and Promotions

Consumers in favour of the move to EDLP

Figure 259: Attitudes towards pricing and promotions, September 2016

Sainsbury's shoppers less convinced by EDLP

Figure 260: Agreement with statements around pricing and promotions, by retailer where the most money is spent, September 2016

Younger consumers far less price-aware

Figure 261: Agreement with the statement 'I rarely pay attention to prices when in a grocery stores', by gender and age, September 2016

In an EDLP world own-brand will be increasingly important

Figure 262: Attitudes towards range reduction and own-brand, September 2016

Tesco shoppers see own-brand as a bigger differentiator

Figure 263: Agreement with the statement 'The main difference between supermarket retailers is their own-brands', by retailer where the most money is spent, September 2016

Attitudes towards Brexit, Sourcing and Ethical Products

Over a third expecting price rises post-Brexit

Figure 264: Attitudes towards the effect of Brexit on pricing, September 2016

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Sourcing is likely to be thrown into the spotlight in a post-Brexit market

Figure 265: Attitudes towards sourcing and the effect of Brexit, September 2016

Aldi shoppers want more locally sourced products

Figure 266: Attitudes towards sourcing and the effect of Brexit, by retailer where the most is spent, September 2016

Younger consumers particularly aware of potential price rises

Figure 267: Agreement with the statement "Leaving the European Union will mean we pay more for groceries in the UK", by age, September 2016

Ethical products perceived at coming at a (unfair) cost

Figure 268: Attitudes towards ethical products, September 2016

Younger consumers have concerns over the ethics of the discounters

Figure 269: Agreement with the statement "The discounters, Aldi and Lidl, are less ethical (eg free-range, fair trade etc) than other supermarkets", by age, September 2016

Leading Retailers – What You Need to Know

The big four continue to lose market share, but losses are slowing

Online: increasingly a channel in its own right

Retail product mix: room to grow non-foods

Advertising spend falls in 2015

Improved levels of trust at Tesco, Sainsbury's and Morrisons

Innovation and Launch Activity

Making supermarkets a destination again

Figure 270: Habitat shop-in-shop, Sainsbury's Nine Elms, October 2016

Groceries delivered straight to the fridge

Pop-up wine bars

Cycle delivery

Figure 271: Sainsbury's Chop Chop, October 2016

Inclusive shopping

Tackling food waste

Fresh as can be

Figure 272: INFARM high-tech kitchen garden in Metro store, Berlin, February 2016

Free fruit for kids

Driverless trolleys

Leading Grocery Retailers – Key Metrics

2015: Another challenging year

Figure 273: Leading grocery retailers: Net sales, 2011-15

Store numbers and sales per outlet

Figure 274: Leading grocery retailers: Store numbers, 2011-15

Figure 275: Leading grocery retailers: Annual sales per outlet, 2011-15

Sales area and densities

Figure 276: Leading grocery retailers: Total sales area, 2011-15

Figure 277: Leading grocery retailers: Annual sales per sq m, 2011-15

Operating profits and margins

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Figure 278: Leading grocery retailers: Operating profits, 2011-15

Figure 279: Leading grocery retailers: Operating margins, 2011-15

Market Shares

Figure 280: Leading grocery retailers: Share of sector sales, 2015

Figure 281: Leading grocery retailers: Share of sector sales, 2011-16

Figure 282: Market shares: the big four grocery multiples vs the discounters, 2011-16

A note on our market share

Space allocation and retail product mix

Online

Around half do some online grocery shopping...

Figure 283: Usage of online grocery shopping, December 2015

...but online only accounts for 5.3% of sector sales

Figure 284: Online grocery sales as a % of all grocery retailers' sector sales, 2011-16

Delivery passes: a double-edged sword?

Figure 285: Ownership and interest in delivery passes, December 2015

Online market shares

Figure 286: Leading online grocery retailers' estimated market shares (excluding VAT), 2015

What about Amazon?

Figure 287: Attitudes towards shopping online for groceries from Amazon, December 2015

Space Allocation Summary

Summary data and classifications

Figure 288: Food, non-food standard classifications, 2016

Convenience comparison overview

Figure 289: UK leading food retailers' hypermarket store format: Convenience comparison overview split, October 2016

Figure 290: UK leading food retailers' superstore format: Convenience comparison overview split, October 2016

Figure 291: UK leading food retailers' smaller supermarkets and discounters: Convenience comparison overview split, October 2016

Detailed convenience comparison split

Figure 292: UK leading food retailers' hypermarket store format: Convenience comparison detailed split, October 2016

Figure 293: UK leading food retailers' superstore format: Convenience comparison detailed split, October 2016

Figure 294: UK leading food retailers' smaller supermarkets and discounters: Convenience comparison detailed split, October 2016

Food and drink split

Figure 295: UK leading food retailers: food and drink categories as a percentage of total space allocated to food and drink, October 2016

Detailed space allocation

Retail Product Mix

Figure 296: Leading food retailers: Estimated sales mix, 2015

Figure 297: Leading food retailers: Category sales as % of total sales, 2015

Figure 298: Sales density, by broad category (ex VAT), 2015

Figure 299: Major food retailers: Estimated market share of key categories, 2015

Brand Research

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What you need to know

Brand map

Figure 300: Attitudes towards and usage of selected brands, October and January 2016

Key brand metrics

Figure 301: Key metrics for selected brands, October and January 2016

Brand attitudes: Lidl and Aldi lead on value

Figure 302: Attitudes, by brand, October and January 2016

Brand personality: Co-op struggles, but shows signs of improvement

Figure 303: Brand personality – macro image, October and January 2016

Discounters are seen as basic, but trendsetting

Figure 304: Brand personality – micro image, October and January 2016

Brand analysis

A good year for Tesco

A Morrisons renaissance

Asda's reputation for value continues to dissipate

Lidl and Aldi increasingly seen to offer more than just value

Exclusivity of Waitrose and M&S Food helps them stand out

Co-op behind but moving in the right direction

Iceland improves its image

Ocado, small but highly recommended

Advertising and Marketing Activity

Total advertising spend falls in 2015

Figure 305: Recorded above-the-line, online display and direct mail total advertising expenditure by UK supermarket and online grocers, 2012-15

Asda and Lidl lead advertising spend

Changing advertising strategies

Co-op increases adspend to focus on convenience

Competition leads to disputes

Figure 306: Recorded above-the-line, online display and direct mail total advertising expenditure by leading UK grocery retailers, 2012-15

TV increases its dominance

Figure 307: Percentage media type split of recorded above-the-line, online display and direct mail total advertising expenditure by UK supermarkets and online grocers, 2012-15

Lidl and Iceland boost spending on TV advertising

Ocado prefers press advertising

Figure 308: Percentage of recorded above-the-line, online display and direct mail total advertising expenditure by the UK's leading grocery retailers, by media type, 2015

Nielsen Ad Intel coverage

Appendix – Data Sources, Abbreviations and Supporting Information

Data sources

Financial definitions

VAT

Abbreviations

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Consumer research methodology

Detailed space allocation

Figure 309: UK leading food retailers hypermarket store format: detailed space allocation, October 2016

Figure 310: UK leading food retailers superstore format: detailed space allocation, October 2016

Figure 311: UK leading food retailers smaller supermarkets and discounters: detailed space allocation, October 2016

Appendix – Sector Size and Forecast

Forecast Methodology

Ahold Group

What we think

Ahold and Delhaize merger completed

Rebrand of Red Market stores

Expanding private-label ranges

Renovation of Albert Heijn XL stores

Where next?

Company background

Company performance

Figure 312: Ahold Europe: Group financial performance, 2011-15

Figure 313: Ahold Europe: Outlet data, 2011-15

Retail offering

Aldi

What we think

Simpler is better

Figure 314: Aldi joint advertising campaign, 2016

Slowing growth in the UK

Entering the Italian market

Experimenting with online

Company background

Company performance

Figure 315: Aldi: Estimated group sales performance, 2011-15

Figure 316: Aldi: Number of outlets, 2011-15

Retail offering

Asda Group

What we think

Gross margins

Cost cutting

Falling market share

Where next?

Company background

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Company performance

Figure 317: Asda Group Ltd: Group financial performance, 2011-15

Figure 318: Asda Group Ltd: Outlet data, 2011-15

Retail offering

Auchan

What we think

Making the best of its store portfolio

Potential in Central and Eastern Europe despite headwinds

Where now?

Company background

Company performance

Figure 319: Auchan: Group financial performance, 2011-15

Figure 320: Auchan: Outlet data (Europe only), 2011-15

Retail offering

Carrefour

What we think

Hypermarkets the ongoing weak spot

Online growing in importance

Looking beyond Drive for online grocery

Company background

Company performance

Figure 321: Carrefour: Group financial performance, 2011-15

Figure 322: Carrefour: Outlet data, 2011-15

Figure 323: Carrefour (Europe): Outlet numbers 2013-15

Figure 324: Carrefour: Store numbers by country, December 2015

Figure 325: Carrefour: European hypermarket numbers (directly operated stores only), 2015

Figure 326: Carrefour: European supermarket numbers (directly operated stores only), 2015

Figure 327: Carrefour: European c-store numbers (directly operated stores only), 2015

Retail offering

Casino

What we think

Casino supermarkets launch new concept for foodies

Hypermarket format recovery

Innovative new click-and-collect service for seafarers

New express home delivery food service

Flexible store format enables grocery shopping at work

New loyalty scheme with additional benefits

Company background

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Company performance

Figure 328: Casino: Group financial performance, 2011-15

Figure 329: Casino: Outlet data and estimated sales per outlet, 2011-15

Retail offering

The Co-operative Food

What we think

New luxe brand to inspire and encourage customers to re-appraise The Co-op Food own-brand

Tailoring food ranges to local communities

Adapting its stores to make the top-up grocery shopping experience easier and quicker

Price cuts eating into profits

Award winning food-to-go product range

Tapping into health issues upper most in consumers' minds

Tackling food waste

Company background

Company performance

Figure 330: The Co-operative Food: Group financial performance, 2011/12-2015/16

Figure 331: The Co-operative Food: Outlet data, 2011/12-2015/16

Retail offering

Dia

What we think

Investment in new and existing retail formats

Strengthening buying power with buying groups

Selling online with Amazon

Investment in international

Company background

Company performance

Figure 332: Dia: Group financial performance, 2011-15

Figure 333: Dia: Outlet data, 2011-15

Figure 334: Dia: Store Formats

Retail offering

Edeka Group

What we think

Independent store operators with local knowledge

Edeka-Kaiser's Tengelmann deal one step closer to being finalised

Targeting the growing convenience channel with a new store format

Inspiring customers to be more adventurous with their cooking

New decentralised e-commerce concept

In-store supermarket burger bar tapping into the food-to-go market

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Company background

The battle for Kaiser's Tengelmann

Company performance

Figure 335: Edeka Group: Food retail sales performance, 2011-15

Figure 336: Edeka Group: Food retail outlet data, 2011-15

Retail offering

Iceland Foods

What we think

Three areas of future focus

New concept store provides pointers to future direction of Iceland brand

Power of Frozen campaign seeks to change perceptions

The Food Warehouse brand taps into retail park popularity

Online business shows potential

Company background

Company performance

Figure 337: Iceland Foods Ltd: Group financial performance, 2011/12-2015/16

Figure 338: Iceland Foods Ltd: Outlet data, 2011/12-2015/16

Retail offering

Intermarché/Netto/ITM Entreprises (Groupement des Mousquetaires)

What we think

Territorial store strength focused on proximity

Expansion of 24/7 click-and-collect points

More generous Intermarché loyalty scheme

Own brand drive supported by in-house R&D team

New easier to navigate supermarket store format deployed in Portugal

Innovative store design for French consumers who have less time to shop

A more personalised online shopping experience

Company background

Company performance

Figure 339: Groupement des Mousquetaires (Intermarché/ITM Entreprises): European retail and supermarkets sales performance, 2013-15

Figure 340: Groupement des Mousquetaires (Intermarché /ITM Entreprises): European supermarket outlet data, 2013-15

Retail offering

Jerónimo Martins

What we think

Possible expansion into Romania

Online grocery shopping not a priority yet, for either brand

Vending machine for 24/7 grocery shopping

Biedronka trialling a new city centre, on-the-go store concept in Warsaw

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Pingo Doce's refurbished stores offer an enhanced shopping experience

Biedronka helping customers to shop more efficiently

Company background

Company performance

Figure 341: Jerónimo Martins: Group financial performance, 2011-15

Figure 342: Jerónimo Martins: Outlet data, 2011-15

Retail offering

E Leclerc

What we think

Forming buying groups to strengthen position

Drive format continues to fuel growth

Investment in stores and product range

Where next?

Company background

Company performance

Figure 343: E Leclerc: Group sales performance, excl. VAT, 2011-15

Figure 344: E Leclerc: Outlet data and sales per outlet, excl. VAT, 2011-15

Retail offering

Marks & Spencer (UK food)

What we think

Convenience food for treats and special occasions

Finding the right balance with availability

Innovation key to keeping offer fresh

Refocusing on the UK

Company background

Company performance

Figure 345: Marks & Spencer (UK food): Group sales performance, 2011/12-2015/16

Figure 346: Marks & Spencer (UK food): Food outlets, by format, 2011/12-2015/16

Figure 347: Marks & Spencer (UK food): Outlet data, 2011/12-2015/16

Retail offering

Mercadona

What we think

Digital Transformation Project

Continuing to invest in store network

International expansion

Where next?

Company background

Company performance

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Figure 348: Mercadona: Group financial performance, excl. VAT, 2011-15

Figure 349: Mercadona: Outlet data, 2011-15

Retail offering

Wm Morrison Group

What we think

Cutting prices...

...to better compete with discounters...

...and address shoppers' pricing concerns post-Brexit

More reasons to visit Morrisons stores

Tailoring product offering to suit local tastes

A more rewarding loyalty card scheme

Flagging up the in-store skills of its trained butchers, bakers and fishmongers

Morrisons.com expanding home delivery coverage

Company background

Company performance

Figure 350: Wm Morrison Group: Group financial performance, 2011/12-2015/16

Figure 351: Wm Morrison Group: Outlet data, 2011/12-2015/16

Retail offering

Ocado

What we think

Scaling up

UK grocery home delivery competition intensifies

Still no news on international partner

Pressure builds for more distribution centres

Company background

Company performance

Figure 352: Ocado group plc: Group financial performance, 2010/11-2014/15

Retail offering

Real (Metro Group)

What we think

Spin-off preparations on track

One-stop quick fix in-store curated recipe-based shopping experience

New cashless payment method to speed up transaction process and reduce queues

Bolstering freshness credentials

Piloting a new hybrid store concept

Hitmeister acquisition spurs online sales growth

Planned expansion of drive-through concept into more densely populated areas

Company background

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Company performance

Figure 353: Real: Group financial performance, 2011/12-2015/16

Figure 354: Real: Outlet data, 2011/12-2015/16

Retail offering

Rewe

What we think

Click-and-collect

Accelerated roll-out of self-checkout technology

Fierce competition drives development of group-wide store brand

Meeting time-strapped consumers' needs for convenient meal solutions

Expansion of smaller convenience food store format

Discount supermarket USP in Italy and Romania

Getting in on the Kaiser's Tengelmann deal

Company background

Company performance

Figure 355: Rewe: Group sales performance, 2011-15

Figure 356: Rewe: Outlet data and estimated sales per outlet, 2011-15

Figure 357: Rewe: Full-range stores and discount stores by country, 2015

Retail offering

J. Sainsbury

What we think

Argos

Distraction

Modest optimism

Company background

Company performance

Figure 358: Sainsbury's: Quarterly sales performance, Q1 2016-Q2 2017

Pharmacy

Figure 359: J. Sainsbury: Group financial performance, 2011/12-2015/16

Figure 360: J. Sainsbury: Outlet data, 2011/12-2015/16

Retail offering

Schwarz Group (Lidl, Kaufland)

What we think

Chasing Aldi in key markets

Changing strategy in France

Plans to break America

Tentative moves online

The Lidl shopper

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Company background

Company performance

Figure 361: Schwarz Group: Group sales performance, 2011/12-2015/16

Figure 362: Schwarz Group: Outlet data, 2011/12-2015/16

Retail offering

Spar International

What we think

Top-up grocery shopping opportunities

More reasons to visit Spar

Supporting consumers healthy food and lifestyle choices

New grocery delivery services

Own brand drive

Digital Leadership Store

Company background

Company performance

Figure 363: Spar International: Retail sales by country, 2011-15

Figure 364: Spar International: Outlets, 2011-15

Figure 365: Spar International: Retail sales area, 2011-15

Figure 366: Spar International: Sales per sq m, by country, 2011-15

Retail offering

Tesco

What we think

Success

Credit where it is due

Making the most of its assets

Retailing against the hard discounters

The problems of maturity

Outside the UK

Company background

Company performance

Figure 367: Tesco: Like-for-like sales performance (excluding fuel), H1 2015/16-H1 2016/17

Figure 368: Tesco, sales and share of food retailers sales, by country, 2014/15 and 2015/16

UK

RoI

Central Europe

Figure 369: Tesco: European businesses, 2016

Figure 370: Central Europe: Store portfolios, October 2016

Online

Fuel

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Tesco Bank

Tesco Mobile

Figure 371: Tesco Plc: Group financial performance, 2011/12-2015/16

Figure 372: Tesco Plc: Outlet data, 2011/12-2015/16

Retail offering

Waitrose

What we think

Store investment focus shifts

Re-affirming its core values

Waitrose 1 helps consolidates premium ranges

Experiential shopping

Online

Company background

Company performance

Figure 373: Waitrose: Group financial performance, 2011/12-2015/16

Figure 374: Waitrose: Outlet data, 2011/12-2015/16

Retail offering

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