

Supermarkets - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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



This report looks at the following areas:

“The days when food retailing was a major growth sector have come to a very sudden end. Food retailers have to cope with the problems of maturity and a shift in demand from large stores to small ones. The challenges are enormous. This is the biggest change in food retailing since the development of larger stores began 70 years ago.”
– Richard Perks, Director of Retail Research

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Table of Contents

Overview

Areas covered in this report

Consumer research coverage

Technical notes

Consumer spending

Retail sales

Financial definitions

Currencies

Abbreviations

VAT rates

Figure 1: Europe: VAT rates, 2012-17

Executive Summary – Europe – The Market

The market

Sector size and forecast

Figure 2: Europe: Food retailers, sales, excl. VAT, 2012-17

Figure 3: Europe: Food retailers, forecast sales, excl. VAT, 2018-22

Consumer spending

Figure 4: Europe: Consumer spending on food, drink and tobacco, inc VAT, 2012-16

Figure 5: Europe: Consumer spending on health and beauty products, inc. VAT, 2012-16

Figure 6: Europe: Spending on food, drink, tobacco and personal care as % all consumer spending, 2016

Inflation

Figure 7: Europe: Harmonised index of food and non-alcoholic beverages prices, annual % change, 2012-17

Figure 8: Europe: Harmonised index of alcohol and tobacco prices, annual % change, 2012-17

Online

Figure 9: Europe: Proportion of individuals who have bought groceries online in the last 12 months, 2012-16

Figure 10: Europe: Proportion of individuals who have bought groceries online in the last 12 months, 2016

Online share of food retailers' sales

Figure 11: Leading European economies: online share of all food retailers' sales, 2016

Leading players

Netherlands

Switzerland

Croatia

Italy

Russia

Figure 12: Europe: Leading food retailers, sales, 2014/15-2016/17

Figure 13: Europe: Leading food retailers, outlets, 2014/15-2016/17

Figure 14: Europe: Leading food retailers, sales per outlet, 2014/15-2016/17

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Market shares

Figure 15: Europe: Leading food retailers, share of all food retailers' sales, 2014/15-2016/17

What we think

Maturity

Online

Inflation

What next?

Executive Summary – Europe – The Consumer

The research

Where people shop

Figure 16: Europe: use of stores and online for grocery shopping, September 2016

Where they shop

Figure 17: Europe: number of retailers taking more than 10% of all main shoppers, September 2017

Discounters

Figure 18: Europe: share of main shoppers and top-up shoppers of top two discounters September, 2017

Market leaders

Figure 19: Europe: grocery market leader by share of main shoppers, September 2017

Other supermarkets used

Figure 20: Europe: top-up grocery market leader by share of shoppers, September 2016

Factors to improve at grocers

Top priority

Figure 21: Europe: grocery shoppers' ranking of priority for improvement, September 2017

Top 5 priorities

Figure 22: Europe: grocery shoppers top 5 priorities for improvement, September 2017

Executive Summary – Europe - Innovation and Launch Activity

Casino testing payment solutions that dispense with checkouts altogether

'The Supermarket of the Future' debuts in Milan

Voice-enabled grocery shopping

Shoppers collecting and delivering online grocery orders for other customers

New click-and-collect service is the largest of its kind in France

Aldi Süd launches car sharing service

A real-time solution to combating food waste in Italy

Continente adds Google Street View

France

Overview

What you need to know

Areas covered in this report

Executive summary

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

The market

Spending and inflation

Figure 23: France: grocery market size segmentation, 2016

Channels of distribution

Figure 24: France: estimated distribution of spending on food and drink, 2016

Sector size and forecast

Figure 25: France: retail sales by format, annual % growth in value sales (incl. VAT), 2012-16

Leading players

Key metrics

Market shares

Figure 26: France: leading grocers' shares of all food retailers sales, 2016

Online

Figure 27: France: drive click and collect, sales development, 2012-16

The consumer

Who shops for groceries

Figure 28: France: responsibility for grocery shopping, by gender, September 2017

How they shop for groceries

Where they shop for groceries

Figure 29: France: type of shopping at grocery retailers, September 2017

Factors to improve at grocery retailers

Figure 30: France: factors to improve at grocery retailers, September 2017

What we think

Issues and insights

Grocery retailers must up their game on home delivery

The facts

The implications

Focus on fresh foods

The facts

The implications

Impact of healthy eating and being "green" on grocery shopping

The facts

The implications

The market – What you need to know

Economy picks up speed after prolonged period of subdued growth

Spending on food and drink growing in value and volume terms

Grocers are the primary channel for buying food and drink

Retail sales strengthened again in 2016

Non-food sales in decline at the hypermarkets

Spending and inflation

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Signs of growth in economic indicators

Food and drink spending picked up in 2016

Figure 31: France: consumer spending on food, drink and tobacco (incl. VAT), 2012-17

Inflation

Figure 32: France: consumer prices * of food and drink, annual % change, 2012-16

Figure 33: France: consumer prices* of food and drink, annual % change, Jan 2016-Sept 2017

Channels of distribution

Grocers dominate

Specialists a vital part of French daily life

Figure 34: France: estimated distribution of spending on food and drink, 2016

Sector size and forecast

Total retail sales recovering, further growth forecast in 2017

Specialists outpacing the grocers

Figure 35: France: food retailers, sales (excl. VAT), 2012-17

But smaller stores outperforming larger ones

Figure 36: France: retail sales by format, annual % growth in value sales (incl. VAT), 2012-16

Decline in non-food sales at the grocers

Figure 37: France: sales in supermarkets and hypermarkets by type of product, January 2012-September 2017

Figure 38: France: food retailers, forecast sales (excl. VAT), 2017-22

Leading players – What you need to know

Leclerc leads

Decline of the hypermarket continues

Lidl's move upmarket

Share of hypermarkets down, smaller stores up

Some €6 billion spent online on groceries

"Drive" click and collect the dominant form of online grocery shopping

Leading players

Leclerc leads

Ongoing decline of the hypermarket

Lidl moves more upmarket

Figure 39: France: leading grocers, sales (excl. VAT), 2013-16

Figure 40: France: leading grocers, outlets, 2013-16

Figure 41: France: leading grocers, sales per outlet, 2013-16

Market shares

Figure 42: France: leading grocers' shares of all food retailers' sales, 2013-16

Online

The online sector as a whole

Online grocery market size

Shopping online for food

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Figure 43: France: percentage of all individuals purchasing online in the past 12 months, 2012-16

"Drive" click and collect dominates

Figure 44: France: drive click and collect, sales development, 2012-16

Figure 45: France: leading grocery retailers' turnover from drive services, 2016

Developing the Drive format

Pedestrian Drives

Home delivery services growing

Third party delivery services

The consumer – What you need to know

Nearly everyone shops for food

Men sharing the load more

In-store shopping still the norm

Changes to the way they shop

Leclerc extending its lead

Evidence of Lidl's premiumisation

Quality of fresh foods has the most room for improvement

Who shops for groceries

Figure 46: France: responsibility for grocery shopping, September 2017

Men participating more

Figure 47: France: responsibility for grocery shopping, by gender, September 2017

How they shop for groceries

Figure 48: France: how they shop for groceries, September 2017

Figure 49: France: how they shop for groceries, by age and gender, September 2017

Shopping behaviours

Figure 50: France: grocery shopping habits, Q3 2017

Growing interest in ethical and environmental shopping

Figure 51: France: grocery shopping habits, Q4 2015 and Q3 2017

Where they shop for groceries

Leclerc extending its lead

Lidl leads the discounters

Figure 52: France: grocery retailers where the most money is spent, September 2017

Figure 53: France: grocery retailer they spend the most with, by average age and income, September 2017

Figure 54: France: type of shopping at grocery retailers, September 2017

Figure 55: France: repertoire of grocery retailers used for top up shopping in a typical month, September 2017

Factors to improve at grocery retailers

Figure 56: France: factors to improve at grocery retailers, September 2017

Leclerc

Figure 57: France: factors to improve at grocery retailers, relative importance compared to the average, Leclerc, September 2017

Carrefour

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Figure 58: France: factors to improve at grocery retailers, relative importance compared to the average, Carrefour, September 2017

Intermarché

Figure 59: France: factors to improve at grocery retailers, relative importance compared to the average, Intermarché, September 2017

Appendix – Data sources, abbreviations and supporting information

Abbreviations

Data sources

INSTITUT NATIONALE DE LA STATISTIQUE ET DES ÉTUDES ÉCONOMIQUES (INSEE) – Paris

EUROSTAT – Luxembourg

EDITIONS DAUVERS - Rennes

Germany

Overview

What you need to know

Areas covered in this report

Executive summary

The market

Consumer spending

Figure 60: Germany: consumer spending on food, drink and tobacco (incl. VAT), annual % change, 2012-17

Inflation

Figure 61: Germany: consumer prices* of food and drink, annual % change, April 2016-September 2017

Channels of distribution

Figure 62: Germany: estimated distribution of spending on food, drink and tobacco, 2016

Sector size and forecast

Leading players

Key metrics

Market shares

Figure 63: Germany: leading grocers' shares of all food retailers' sales, 2016

Online

Figure 64: Germany: how they shop for groceries, by parental status, September 2017

The consumer

Who shops for groceries

Figure 65: Germany: responsibility for grocery shopping, September 2017

How they shop for groceries

Figure 66: Germany: how they shop for groceries, September 2017

Where they shop for groceries

Figure 67: Germany: grocery retailers where the most money is spent, September 2017

Factors to improve at grocery retailers

Figure 68: Germany: factors to improve at grocery retailers, September 2017

What we think

Issues and insights

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

The allure of online grocery shopping for families

The facts

The implications

Good things come to those who don't make consumers wait

The facts

The implications

The market – What you need to know

Consumer spending driven up by inflation

Grocers account for 80% of consumer spending

Food retailers' sales just shy of €200 billion in 2017

Spending and inflation

Domestic spending continues to drive the economy

Spending in 2017 pushed up by inflation

Figure 69: Germany: consumer spending on food and drink (incl. VAT), 2012-17

Inflation

Figure 70: Germany: consumer prices* of food and drink, annual % change, 2012-16

Figure 71: Germany: consumer prices* of food and drink, annual % change, April 2016-September 2017

Channels of distribution

Figure 72: Germany: estimated distribution of spending on food, drink and tobacco, 2016

Sector size and forecast

Grocers continue to grow faster than specialists

Figure 73: Germany: food retailers, sales (excl. VAT), 2012-17

Figure 74: Germany: food retailers, forecast sales (excl. VAT), 2017-22

Leading players – What you need to know

Catering to convenience

Edeka leads but Rewe catching up

Online grocery retailing gaining traction

Online grocery retailing gaining traction

Leading players

Edeka focusses on convenience

Rewe has a good year

Aldi invests at home

Kaiser's Tengelmann fascia finally disappears

Figure 75: Germany: leading grocers, sales, 2013-16

Figure 76: Germany: leading retailers, outlets, 2013-16

Figure 77: Germany: leading retailers, sales per outlet, 2013-16

Market shares

Figure 78: Germany: leading grocers' shares of all food retailers' sales, 2013-16

Online

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

The online sector as a whole

Online grocery market size

Shopping online for food

Figure 79: Germany: percentage of all individuals purchasing online in the past 12 months, 2012-16

Edeka launches same-day delivery via acquired platform

Rewe growing its online sales

Amazon Fresh finally lands in Germany

Kaufland delays expected expansion

The consumer – What you need to know

Women increasingly sharing responsibility

Store-based shopping continues to dominate

Lidl marginally ahead in a fragmented market

Checkout waiting times prove a bugbear to consumers

Who shops for groceries

Majority of consumers take full responsibility for grocery shopping

Figure 80: Germany: responsibility for grocery shopping, September 2017

Women increasingly sharing responsibility for shopping

Figure 81: Germany: who shops for groceries, by gender, September 2017

How they shop for groceries

Store-based shopping dominates

Figure 82: Germany: how they shop for groceries, September 2017

Online penetration higher among men

Figure 83: Germany: how they shop for groceries, by gender, September 2017

Parents most likely to shop online

Figure 84: Germany: how they shop for groceries, by parental status, September 2017

Online grocery shopping appeals to the most affluent

Figure 85: Germany: proportion doing any of their grocery shopping online (net), by household income, September 2017

Where they shop for groceries

Lidl marginally ahead in a fragmented market

Figure 86: Germany: grocery retailers where the most money is spent, September 2017

Parents go to Kaufland

Figure 87: Germany: grocery retailer where the most money is spent, by parental status, September 2017

Lidl more popular with younger consumers than Aldi

Figure 88: Germany: grocery retailer where the most money is spent, by age, September 2017

Aldi proves more popular as a secondary shopping location

Figure 89: Germany: grocery retailers used for top up shopping, September 2017

German consumers like to shop around

Figure 90: Germany: repertoire of grocery retailers used for top up shopping in a typical month, September 2017

Factors to improve at grocery retailers

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Checkout waiting times a bugbear for German consumers

Figure 91: Germany: factors to improve at grocery retailers, September 2017

Lidl shoppers would like to see a loyalty scheme introduced

Figure 92: Germany: factors to improve at grocery retailers, relative importance compared to the average, Lidl, September 2017

Aldi shoppers want more information and faster checkout service

Figure 93: Germany: factors to improve at grocery retailers, relative importance compared to the average, Aldi, September 2017

Edeka shoppers want better stock availability

Figure 94: Germany: factors to improve at grocery retailers, relative importance compared to the average, Edeka, September 2017

Rewe shoppers want more organic products

Figure 95: Germany: factors to improve at grocery retailers, relative importance compared to the average, Rewe, September 2017

Kaufland shoppers want better navigation

Figure 96: Germany: factors to improve at grocery retailers, relative importance compared to the average, Kaufland, September 2017

Appendix – Data sources, abbreviations and supporting information

Abbreviations

Data sources

STATISTISCHES BUNDESAMT – Wiesbaden

EUROSTAT – Luxembourg

BeVH - Berlin

Italy

Overview

What you need to know

Areas covered in this report

Executive summary

The market

Spending and inflation

Figure 97: Italy: consumer spending on food, drink and tobacco (incl. VAT), annual growth, 2012-17

Figure 98: Italy: consumer prices* of food and drink, annual % change, January 2016–October 2017

Channels of distribution

Figure 99: Italy: estimated distribution of spending on food and beverages, 2016

Sector size and forecast

Figure 100: Italy: food retailers' sales* versus all retailers' sales* (excl. fuel), 2012-17

Leading players

Key metrics

Market shares

Figure 101: Italy: leading grocers' shares of all food retailers sales, 2016

Online

Figure 102: Italy: oNLINE PURCHASING IN THE PAST 12 MONTHS, EUROPEAN COMPARISONS, 2016

The consumer

Who shops for groceries

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Figure 103: Italy: who shops for groceries, by gender, September 2017

How they shop for groceries

Figure 104: Italy: how they shop for groceries, September 2017

Where they shop for groceries

Figure 105: Italy: grocery retailers where the most money is spent, September 2017

Factors to improve at grocery retailers

Figure 106: Italy: factors to improve at grocery retailers, September 2017

What we think

Issues and insights

Is there room for another major discounter in Italy?

The facts

The implications

Is it finally the time for online grocery to take off in Italy?

The facts

The implications

The market – What you need to know

Consumer spending drives GDP increase

Inflation almost negligible

Grocers take three-quarters of spending on food drink

Good growth in 2016 but not as high as the previous year

A return to slightly stronger growth is predicted

Spending and inflation

Italian economy is still weak

Consumer spending drives GDP increases

Figure 107: Italy: consumer spending on food, drink and tobacco (incl. VAT), 2012-17

Inflation

Figure 108: Italy: consumer prices * of food and drink, annual % change, 2012-16

Figure 109: Italy: consumer prices* of food and drink, annual % change, January 2016-October 2017

Channels of distribution

Figure 110: Italy: estimated distribution of spending on food and beverages, 2016

Figure 111: Italy: estimated distribution of spending on food and beverages, 2012-16

Sector size and forecast

2016 growth good but not as high as the previous year

Figure 112: Italy: food retailers, sales (excl. VAT), 2012-17

Figure 113: Forecast food retailers, forecast sales (excl. VAT), 2017-22

Leading players – What you need to know

Coop Italia maintains sales growth momentum

Rivals enhance own brand and seek to develop improved online offers

Coop Italia retains market leadership

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Online in Italy: Small and underdeveloped but bubbling under

Leading players

Coop Italia reasserts its position

Conad invests for growth

Selex growth outstrips its main rivals

Esselunga spreads its wings

Gruppo VEGÉ leaps ahead

Aldi still to open first store

Figure 114: Italy: leading grocers, sales (excl. VAT), 2014-16

Carrefour only major operator to shrink store estate

Figure 115: Italy: leading grocers, outlets, 2014-16

Figure 116: Italy: leading grocers, Sales per outlet, 2014-16

Market shares

Figure 117: Italy: leading grocers' shares of all food retailers sales, 2014-16

Online

The online sector as a whole

Online market size for food

Shopping online for food

Figure 118: Italy: percentage of all individuals purchasing online in the past 12 months, 2012-16

Figure 119: Italy: oNLINE PURCHASING IN THE PAST 12 MONTHS, EUROPEAN COMPARISONS, 2016

Leading online players

Organisation structure can be a barrier to e-commerce delivery

Conad unconvinced about online grocery

Amazon trying to secure a slice of online grocery business

The consumer – What you need to know

Responsibility falls on female consumers

Consumers still reluctant to embrace online

Coop Italia still the most popular primary shopping destination

Consumers want to see fresh food improvements

Who shops for groceries

More than half responsible for grocery shopping

Figure 120: Italy: who shops for groceries, September 2017

Gender divide remains

Figure 121: Italy: who shops for groceries, by gender, September 2017

How they shop for groceries

Most still shop in-store

Figure 122: Italy: how they shop for groceries, September 2017

35-44s drive online purchasing

Figure 123: Italy: how they shop for groceries, by age, September 2017

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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Grocery shopping habits – Consumers are looking for a bargain

Figure 124: Italy: grocery shopping habits, Q4 2017

Where they shop for groceries

More people spend most with the Coop

Figure 125: Italy: grocery retailers where the most money is spent, September 2017

A&O attracts a young shopper

Figure 126: Italy: grocery retailer they spend the most with, by average age and income, September 2017

Lidl also a popular choice

Figure 127: Italy: grocery retailers used for top up shopping, September 2017

Half of consumers are loyal to one retailer

Figure 128: Italy: repertoire of grocery retailers used for top up shopping in a typical month, September 2017

Esselunga's online offer stands out

Figure 129: Italy: how they shop for groceries, by main retailer used, September 2017

Factors to improve at grocery retailers

Most want better quality fresh food

Figure 130: Italy: factors to improve at grocery retailers, September 2017

Provenance is also important

Figure 131: Italy: factors to improve at grocery retailers, by rank, September 2017

Lidl shoppers want a loyalty scheme

Figure 132: Italy: factors to improve at grocery retailers, by main retailer, September 2017

Appendix – Data sources, abbreviations and supporting information

Abbreviations

Data sources

ISTITUTO CENTRALE DI STATISTICA (ISTAT) – Rome

EUROSTAT – Luxembourg

PIANETA DISTRIBUZIONI, a report produce by Largo Consumo

Spain

Overview

What you need to know

Areas covered in this report

Executive summary

The market

Consumer spending

Figure 133: Spain: annual % change in consumer spending, 2012-17

Inflation

Figure 134: Spain: consumer prices of food and drink, annual % change, Jan 2016-Sept 2017

Channels of distribution

Figure 135: Spain: estimated distribution of spending on food, drink and tobacco, 2016

Sector size and forecast

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Leading players

Key metrics

Market shares

Figure 136: Spain: leading grocers' shares of all food retailers' sales, 2016

Online

Figure 137: Spain: online sales by product category and type of retailer, 2016

The consumer

Who shops for groceries

Figure 138: Spain: who is responsible for grocery shopping, September 2017

How they shop for groceries

Figure 139: Spain: how they shop for groceries, September 2017

Where they shop for groceries

Figure 140: Spain: grocery retailers where the most money is spent, September 2017

Figure 141: Spain: other grocery retailers used in Spain, September 2017

Factors to improve at grocery retailers

Figure 142: Spain: what consumers would like to see improved at the grocery retailer they spend most money with, based on any rank, September 2017

What we think

Issues and insights

How are retailers adapting to changing shopping habits?

The facts

The implications

What are the opportunities for driving sales?

The facts

The implications

The market – What you need to know

Spending on food and drink grows

Inflation rises in 2017

Grocers account for 75% of the total market

Growth of food specialists outpacing grocers

Sales at food retailers to reach €115.7 billion by 2022

Spending and inflation

The economy in Spain

Consumer spending on food and drink

Figure 143: Spain: consumer spending on food, drink and tobacco (incl. VAT), 2012-17

Inflation

Figure 144: Spain: consumer prices of food and drink, annual % change, 2012-16

Figure 145: Spain: consumer prices of food and drink, annual % change, Jan 2016-Sept 2017

Channels of distribution

Grocers account for 75% of the total market

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Figure 146: Spain: estimated distribution of spending on food, drink and tobacco, 2016

Sector size and forecast

Growth of food specialists outpacing grocers

Figure 147: Spain: food retailers, sales (excl. VAT), 2013-17

Sales at food retailers to reach €115.7 billion by 2022

Figure 148: Spain: food retailers, forecast sales (excl. VAT), 2017-22

Leading players – What you need to know

Mercadona leads the market

Increase in convenience store formats

Discounter Lidl grows market share

Online grocery retailing is still underdeveloped

Leading players

Mercadona grows revenue by 3.8%

Increase in convenience store formats

Discounters expand

Figure 149: Spain: leading grocers, sales (excl VAT), 2014-16

Figure 150: Spain: leading grocers, outlets, 2014-16

Figure 151: Spain: leading grocers, sales per outlet, 2014-16

Market shares

Figure 152: Spain: leading grocers' shares of all food retailers' sales, 2014-16

Online

Online retailing in Spain

Figure 153: Spain: online sales by product category and type of retailer, 2016

Shopping online for food

Figure 154: Spain: percentage of all individuals purchasing online in the past 12 months, 2012-16

Figure 155: Spain: online purchasing, 2012-16

Figure 156: Europe: percentage of all individuals purchasing online in the past 12 months, 2016

Leading players in online grocery retailing

Amazon launches Amazon Pantry in Spain

The consumer – What you need to know

Women do most of the grocery shopping

Most shop in-store for food

Mercadona remains the most popular

Lidl increases in popularity

Quality of fresh foods is main improvement wanted

Demand for better loyalty schemes

Who shops for groceries

Figure 157: Spain: who is responsible for grocery shopping, September 2017

Women do most of the grocery shopping

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Figure 158: Spain: who is responsible for grocery shopping, by gender, September 2017

Gender gap is greater among older people

Figure 159: Spain: consumers mainly/wholly responsible for grocery shopping, by gender and age group, September 2017

How they shop for groceries

Most shop in-store for food

Figure 160: Spain: how they shop for groceries, September 2017

Figure 161: Spain: how they shop for groceries, September 2017

Carrefour shoppers most likely to shop online

Figure 162: Spain: how they shop for groceries by main retailer shopped at, September 2017

Where they shop for groceries

Mercadona remains the most popular

Figure 163: Spain: grocery retailers where the most money is spent, September 2017

Retailer by age and income

Figure 164: Spain: grocery retailers where the most money is spent, by average age and income, September 2017

Lidl increases in popularity

Figure 165: Spain: grocery retailers used for top up shopping, September 2017

Spaniards shop at few retailers for food

Figure 166: Spain: repertoire of grocery retailers used for top up shopping, September 2017

Factors to improve at grocery retailers

Quality of fresh foods is main improvement wanted

Figure 167: Spain: factors that consumers would like to see improved at the grocery retailers they spend most money with, based on any rank, September 2017

Demand for better loyalty schemes

Figure 168: Spain: factors ranked first that consumers would like to see improved at the grocery retailers they spend most money with, September 2017

Demand for Carrefour to improve customer service

Figure 169: Spain: factors to improve at grocery retailers, relative importance compared to the average, Mercadona and Carrefour, September 2017

Appendix – Data sources, abbreviations and supporting information

Abbreviations

Data sources

INSTITUTO NACIONAL DE ESTADISTICA (INE) – Madrid

EUROSTAT – Luxembourg

Comisión Nacional de los Mercados y la Competencia

UK

Overview

What you need to know

Products covered in this Report

Executive summary

The market

Real incomes now falling

Figure 170: Real incomes: CPIH versus annual weekly earnings (excluding bonuses) Jan 2014-Oct 2017

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Consumer spending on food and drink accelerates

Grocery retail sales return to more substantial growth

Figure 171: All food retail sales (incl. VAT), 2012-22

Supermarkets sales also expected to return to growth...

Figure 172: Supermarkets' market size and forecast (incl. VAT), 2012-22

...but are likely to continue to lose share of spending

Figure 173: Estimated channels of distribution for grocery retail sales, 2016

Leading retailers

Tesco remains the dominant player

Figure 174: Leading grocery retailers: share of all grocery retail sales, 2016

Aldi and Lidl continue to gain ground

Tesco continues to recover its brand image

Figure 175: Attitudes towards and usage of selected brands, September 2017

The consumer

Levels of top-up shopping continue to rise

Figure 176: Grocery shopping behaviour, September 2015-17

A majority continue to spend the most in supermarkets

Figure 177: Types of stores where consumers spend the most, September 2016 and 2017

Meal planning influences shopping behaviour

Figure 178: How grocery shoppers plan meals in advance, September 2017

Tesco the most used retailer in the UK

Figure 179: Grocery retailers used for primary and secondary shops, September 2017

Nine in ten supermarket shoppers purchase non-foods

Figure 180: Types of non-foods purchased in supermarkets, September 2017

Consumers have noticed price rises

Figure 181: Attitudes to pricing and trading down, September 2017

What we think

Issues and insights

This season's must have accessory: wholesale

The facts

The implications

Trading up/down/sideways: What falling real incomes could mean for the sector

The facts

The implications

Amazon and Whole Foods: for now file under 'potential'

The facts

The implications

The market – What you need to know

Inflation continues to grow...

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

...meaning real incomes are now falling

Consumer spending on food and drink accelerates

Grocery retail sales return to more substantial growth

Supermarkets sales also expected to return to growth...

...but are likely to continue to lose share of spending

Market drivers

Inflation rises

Figure 182: Food and drink inflation, 2012-October17

Consumer spending power falls

Figure 183: Average weekly earnings by consumer price index, Jan 2014-Sep 2017

Consumer confidence has taken a hit but is holding up overall

Figure 184: Consumer confidence: current financial situation vs sentiment for the coming year, Jan 2014-Sep 2017

Private renting increases

Figure 185: UK household tenure status, 2011-16

Consumer spending on food and drink

Figure 186: Consumer spending on core food and drink categories, 2012-17

Spending on food

Figure 187: Annual % change in the value, volume and prices in the food category, 2012-17

How food spending breaks down

Figure 188: Composition of consumer spending on food, categories as a % of total spending, 2016

Spending on non-alcoholic drinks

Figure 189: Annual % change in the value, volume and prices in the non-alcoholic beverages category, 2012-17

Spending on alcoholic drinks

Figure 190: Annual % change in the value, volume and prices in the alcoholic beverages category, 2012-17

Figure 191: Composition of consumer spending on alcoholic drinks, categories as a % of total spending, 2016

Sector size and forecast

Grocery sector returns to strong growth driven by inflation

Figure 192: All food retail sales (incl. VAT), 2012-22

Figure 193: All food retail sales, market size and forecast, 2012-22

Supermarket sector predicted to return to growth...

Figure 194: Supermarkets' market size and forecast (incl. VAT), 2012-22

Figure 195: Supermarkets: market size and forecast (incl. VAT), 2012-22

...but are likely to continue to lose share in the short term

Figure 196: Estimated percentage of grocer sector sales accounted for by supermarkets, 2012-22

Forecast methodology

Channels of distribution

Supermarkets account for over half of all grocery retail sales

Figure 197: Estimated channels of distribution for grocery retail sales, 2016

However supermarkets are increasingly sharing consumer baskets

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Figure 198: Estimated breakdown of sector sales, by channel, 2012-17

The consumer – What you need to know

Levels of top-up shopping continue to rise

A majority continue to spend the most in supermarkets

Meal planning influences shopping behaviour

Tesco the most used retailer in the UK

Nine in ten supermarket shoppers purchase non-foods

Consumers have noticed price rises

Traditional loyalty schemes still hold significance for shoppers

How they shop

Nine in ten are responsible for grocery shopping

Figure 199: Who is responsible for grocery shopping in the household, September 2017

Grocery shopping habits are becoming more fluid

Figure 200: Grocery shopping behaviour, September 2015-17

Younger consumers more likely to do a singular main shop

Figure 201: Shopping behaviour by age, September 2017

However such behaviours are not static

Figure 202: Mintel's Grocery Tracker: shopping behaviour March 2016-June 2017

Types of stores used

Over half of grocery shoppers still spend the most in supermarkets

Figure 203: Types of stores where consumers spend the most, September 2016-2017

Who spends the most in supermarkets?

Figure 204: Types of stores where consumers spend the most, by age, September 2017

Figure 205: Types of stores where consumers spend the most, by parental status, September 2017

Figure 206: Types of stores where consumers spend the most, by type of area lived in, September 2017

The influence of family on shopping habits

Figure 207: Parental influence on grocery shopping, September 2017

The impact of planning and eating out

Most do some form of meal planning

Figure 208: How grocery shoppers plan meals in advance, September 2017

Figure 209: How grocery shoppers plan meals in advance, by age, September 2017

How does meal planning affect grocery shopping behaviour?

Figure 210: How grocery shoppers plan meals in advance, by grocery shopping behaviour, September 2017

Just under a third eat out or have a takeaway for dinner at least once a week

Figure 211: Frequency of eating out, September 2017

Figure 212: Frequency of eating out, by age, September 2017

How does eating out affect shopping behaviours?

Figure 213: Frequency of eating out, by grocery shopping behaviour, September 2017

Retailers used

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Tesco the UK's most visited grocery retailer

Figure 214: Grocery retailers used, September 2017

Figure 215: Trend of grocery retailers used, September 2015 -2017

Tesco's success is borne out of capturing both main and secondary shops

Figure 216: Grocery retailers used for primary and secondary shops, September 2017

Less than one in ten shop with one retailer

Figure 217: Repertoire of secondary retailers used, September 2017

Asda shoppers most likely to do a secondary shop at the discounters

Figure 218: Where leading retailers' primary shoppers also shop, September 2017

Retailer demographic comparison

Tesco attracts the highest level of young secondary shoppers

Figure 219: Leading grocery retailers used for primary and secondary shops, by age, September 2017

Figure 220: The discounters: primary and secondary shoppers, by age, September 2017

Tesco and Sainsbury's picking up secondary use in urban areas

Figure 221: Leading grocery retailers used for primary and secondary shops, by age, September 2017

Tesco and Sainsbury's strongest in the capital

Figure 222: Leading retailers' primary shoppers, by region lived in, September 2017

Figure 223: Leading retailers' secondary shoppers, by region lived in, September 2017

Asda strong in the lower socio-economic groups

Figure 224: Leading grocery retailers used for primary and secondary shops, by socio-economic group, September 2017

Figure 225: Aldi and Lidl, primary and secondary grocery shoppers, by socio-economic group, September 2017

Non-foods in supermarkets

Health and beauty the most popular non-food category

Figure 226: Types of non-foods purchased in supermarkets, September 2017

Clothing purchasing peaks amongst Asda shoppers

Figure 227: Types of non-foods purchased in supermarkets, by retailer where the most money is spent in a typical month, September 2017

Consumers tend to favour a few categories

Figure 228: Types of non-foods purchased in supermarkets, repertoire analysis, September 2017

Non-food products and services seen as time-saving and convenient

Figure 229: Attitudes to non-foods in supermarkets, September 2017

Young consumers more likely to be swayed by non-food range

Figure 230: Types of non-foods purchased in supermarkets, September 2017

Attitudes to prices and loyalty schemes

Consumers have noticed price increases

Figure 231: Attitudes to pricing and trading down, September 2017

Older consumers most likely to have noticed price increases

Figure 232: Agreement to statements about pricing and trading down, by age, September 2017

A move to own-brand?

Figure 233: Mintel Grocery Tracker: attitudes to own v private label, March 2016-Sep 2017

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Loyalty schemes

Figure 234: Attitudes to loyalty schemes, September 2017

Figure 235: Agreement to statements around loyalty schemes, by retailer with who the most money is spent in a typical month, September 2017

Leading retailers – What you need to know

Tesco is still the dominant player

Aldi and Lidl continue to gain ground

Tesco continues to recover its brand image

Almost half of consumers do some shopping online

Checkout free grocery

Leading grocery retailers – Key metrics

2016 sees a return to growth for (most of) the leading players

Figure 236: Leading grocery retailers: net sales, 2012-16

Consolidation amongst the symbol groups

Figure 237: Leading grocery retailers: store numbers, 2012-16

Figure 238: Leading grocery retailers: annual sales per outlet, 2012-16

Sales area and densities

Figure 239: Leading grocery retailers: total sales area, 2012-16

Figure 240: Leading grocery retailers: annual sales per sq m, 2012-16

Operating profits and margins

Figure 241: Leading grocery retailers: operating profits, 2012-16

Figure 242: Leading grocery retailers: operating margins, 2012-16

Market share

Tesco is the market leader

Figure 243: Leading grocery retailers: share of all grocery retail sales, 2016

Figure 244: Leading grocery retailers: share of all grocery retail sales, 2012-17

Could Aldi crack the top four?

Figure 245: Market shares: The Big Four grocery multiples vs the discounters, 2010-17

A note on our market share

Space allocation summary

Summary data and classifications

Figure 246: Food, non-food standard classifications, 2017

Convenience comparison overview

Figure 247: UK leading food retailers' hypermarket store format: convenience comparison overview split, November 2017

Figure 248: UK leading food retailers' superstore format: convenience comparison overview split, November 2017

Figure 249: UK leading food retailers' smaller supermarkets and discounters: Convenience comparison overview split, November 2017

Detailed convenience comparison split

Figure 250: UK leading food retailers' hypermarket store format: convenience comparison detailed split, November 2017

Figure 251: UK leading food retailers' superstore format: convenience comparison detailed split, November 2017

Figure 252: UK leading food retailers' smaller supermarkets and discounters: convenience comparison detailed split, November 2017

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Food and drink categories split

Figure 253: UK leading food retailers: food and drink categories as a percentage of total space allocated to food and drink, November 2017

Retail product mix

Figure 254: Leading food retailers, estimated sales mix, 2016

Figure 255: Leading food retailers: category sales as % total sales, 2016

Figure 256: Leading food retailers, sales density by broad category, 2016

Figure 257: Leading food retailers: estimated share of key product markets, 2016

Brand research

What you need to know

Brand map

Figure 258: Attitudes towards and usage of selected brands, September 2017

Key brand metrics

Figure 259: Key metrics for selected brands, September 2017

Brand attitudes: Aldi and Lidl lead perceptions of offering good value

Figure 260: Attitudes, by brand, September 2017

Brand personality: Still work to do for the Co-op to change perceptions

Figure 261: Brand personality – Macro image, September 2017

The big four trade on being reliable and accessible

Figure 262: Brand personality – Micro image, September 2017

Brand analysis

Tesco

Sainsbury's

Asda

Morrisons

Aldi

The Co-op

Lidl

M&S Simply Food

Iceland

Waitrose

Ocado

Amazon and Whole Foods

Online

Over half do online grocery shopping

Figure 263: Usage of online grocery shopping, December 2016

Online grocery is only around 6% of total sector sales

Figure 264: Estimated breakdown of sector sales, by channel, 2012-17

Delivery passes on the rise

Figure 265: Ownership of delivery passes, December 2016

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Tesco is the dominant online player but losing market share

Figure 266: Leading online grocery retailers' estimated market shares, 2016

Launch activity and innovation

Checkout-free grocery shopping

Speedy delivery services

Voice-controlled devices that can order grocery items for direct delivery to your home

Driverless grocery delivery

New grocery store with a unique, artisan-style twist on the traditional supermarket experience

Zero waste supermarkets

Sainsbury's capitalising on the revival in interest in vinyl

Grab & Go van to save them time and effort travelling to a store

Advertising and marketing activity

2016 total advertising spend declined 5.8% year-on-year

Figure 267: Recorded above-the-line, online display and direct mail total advertising expenditure by UK supermarket and online grocers, 2013-16

Asda toppled by Lidl as the leading advertiser by spend

Figure 268: Recorded above-the-line, online display and direct mail total advertising expenditure by leading UK supermarket and online grocers, 2013-16

Advertising spend peaks around Easter and in the month leading up to Christmas

Figure 269: Recorded above-the-line, online display and direct mail total advertising expenditure by UK supermarket and online grocers, by month, 2015-16

TV accounted for the lion's share of spend in 2016

Figure 270: Percentage media type split of recorded above-the-line, online display and direct mail total advertising expenditure by UK supermarkets and online grocers, 2013-16

What we've seen so far in 2017

Nielsen Ad Intel coverage

Ahold Delhaize

What we think

A good fit

Local brands at core of company strategy

What next?

Company background

Company performance

Figure 271: Ahold Delhaize: group financial performance*, 2015-16

Figure 272: Ahold Delhaize: outlet data*, 2015-16

Retail offering

Aldi

What we think

The key markets

Germany

UK

US

Australia

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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Further expansion

Company background

Company performance

Figure 273: Aldi: estimated group sales performance, 2012-16

Figure 274: Aldi: number of outlets, 2012-16

Retail offering

Asda Group

What we think

Toyou drives footfall into stores

Lack of significant convenience presence could be an issue

Better solution may be to push hard on online development

A deal on the horizon?

Cost-cutting on the agenda

What next?

Company background

Company performance

Figure 275: Asda Group Ltd: group financial performance, 2012-16

Figure 276: Asda Group Ltd: outlet data, 2012-16

Retail offering

Auchan

What we think

Single brand simplifies relationship with customers

Selling off non-core businesses

Stronger buying links with Système U but closer relationship ruled out

An expanding presence in Eastern Europe

What next?

Company background

Company performance

Figure 277: Auchan: group financial performance, 2012-16

Figure 278: Auchan: outlet data, 2012-16

Retail offering

Carrefour

What we think

A new boss, a new plan

Core strength in food growing strongly

Expanding convenience formats

Online evolving

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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Company performance

Group

France

Rest of Europe

Figure 279: Carrefour: group financial performance, 2012-16

Figure 280: Carrefour: outlet data, 2012-16

Figure 281: Carrefour (Europe): outlet numbers, 2013-16

Figure 282: Carrefour: store numbers by country, 2015-16 (at December)

Figure 283: Carrefour: European hypermarket numbers (directly operated stores only), 2016

Figure 284: Carrefour: European supermarket numbers (directly operated stores only), 2016

Figure 285: Carrefour: European c-store numbers (directly operated stores only), 2016

Retail offering

Casino

What we think

Enhanced discount shopping experience fuelling growth at Leader Price

Hypermarkets focusing on food and cutting back on non-food retail space

Supermarkets improve fresh food offering and multichannel capability

Longer opening hours, new loyalty card and more delivery options boost Monoprix

Evolving 'Mandarine' store format driving sales at ultra-convenient chain Franprix

Other convenience banners upgrading their offering and introducing new concepts

Quickening the checkout process across its retail brands

Company background

Company performance

Figure 286: Casino: group financial performance, 2012-16

Figure 287: Casino (France): outlet data, 2012-16

Retail offering

The Co-operative Food

What we think

£137.5 million bid for wholesale group Nisa

IT investment transforming the store experience

Rolling out local sourcing programme nationwide

Healthier food options

Bolstering eco credentials

Company background

Company performance

Figure 288: The Co-operative Food: group financial performance, 2012/13-2016/17

Figure 289: The Co-operative Food: outlet data, 2012/13-2016/17

Retail offering

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Dia

What we think

Store remodelling programme

Greater focus on gourmet foods

Focus on online

Investment in international

Company background

Company performance

Figure 290: Dia: group financial performance, 2012-16

Figure 291: Dia: outlet data, 2012-16

Figure 292: Dia: store formats

Retail offering

Edeka Group

What we think

Same-day grocery delivery service

New convenience store concept

Convenient grocery delivery fulfilment option

Edeka expanding into the drugstore market

Netto Marken-Discount responding to consumers' food provenance concerns

Company background

Company performance

Figure 293: Edeka Group: food retail sales performance, 2012-16

Figure 294: Edeka Group: food retail outlet data, 2012-16

Retail offering

E Leclerc

What we think

A trailblazer on price

Leader in the Drive format

Company background

Company performance

Figure 295: E Leclerc: estimated group sales performance, excl. VAT, 2012-16

Figure 296: E Leclerc: outlet data, 2012-16

Retail offering

Iceland Foods

What we think

New concept stores continue to be rolled out

Quality focus for products

Loyalty programme to move to existing payment cards

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Company background

Company performance

Figure 297: Iceland Foods Ltd: group financial performance, 2012/113-2016/17

Figure 298: Iceland Foods Ltd: outlet data, 2012/13-2016/17

Retail offering

Jerónimo Martins

What we think

Pingo Doce focused on own brand development to maintain price competitiveness

Store improvements helping grow Pingo Doce sales

New pre-ordered meal solutions service for time-pressed households

New Biedronka deli concept sparks rumours of a push into convenience grocery retail

Self-service Biedronka outlets to reduce checkout queuing times

Biedronka promoting good health through sportswear launch and reformulated food products

Biedronka expanded non-food offering

Biedronka bolstering its appeal as a retail destination for cosmetics

Company background

Company performance

Figure 299: Jerónimo Martins: group financial performance, 2012-16

Figure 300: Jerónimo Martins: outlet data, 2012-16

Retail offering

Marks & Spencer (UK Food)

What we think

Delivery and convenience prioritised

Sushi counters

Plan A 2025 – A new sustainability and eco focus

Company background

Company performance

Figure 301: Marks & Spencer (UK Food): group sales performance, 2012/13-2016/17

Figure 302: Marks & Spencer (UK Food): food outlets, by format, 2012/13-2016/17

Figure 303: Marks & Spencer (UK Food): outlet data, 2012/13-2016/17

Retail offering

Mercadona

What we think

Growing importance in the world of beauty

Continuing to invest in its store network

Focus on fresh products

International expansion

What next?

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Company background

Company performance

Figure 304: Mercadona: group financial performance, excl. VAT, 2012-16

Figure 305: Mercadona: outlet data, 2012-16

Retail offering

Wm Morrison Group

What we think

'Fresh look' supermarket format driving store sales growth

Re-entry into the convenience market

Responding to consumer demand for more locally sourced food and drink products

New store-pick online service extends home delivery reach

Expanded online product offering boosting e-commerce sales

Own-label push to combat food price inflation

First womenswear range

Cutting food waste

Company background

Company performance

Figure 306: Wm Morrison Group: group financial performance, 2012/13-2016/17

Figure 307: Wm Morrison Group: outlet data, 2012/13-2016/17

Retail offering

Les Mousquetaires (Intermarché)

What we think

A new strategy

Overhaul of private label

Digitalisation

Netto doing well

Company background

Company performance

Figure 308: Les Mousquetaires: grocery operations – Estimated sales performance, 2013-16

Figure 309: Les Mousquetaires: grocery outlet data, 2012-16

Retail offering

Figure 310: France: customer profile of consumers using Intermarché for their main shop, September 2017

Ocado Group

What we think

Waitrose sourcing agreement has positives and negatives

No guarantee that Waitrose will terminate...

...but the implications for Ocado if it does

Broadening the customer base

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Diversifying into new sectors

What next?

Company background

Company performance

Figure 311: Ocado Group plc: group financial performance, 2011/12-2015/16

Figure 312: Ocado Group plc: key performance metrics, 2012/13-2015/16

Retail offering

Real

What we think

New Markthalle Krefeld store concept success

New buying alliance will bring extended product range and lower prices

Integration of Hitmeister expands online product offering

Preparing to roll out a nationwide grocery home delivery service

Considering roll-out of click-and-collect across its entire store network

Voice-controlled shopping

Company background

Company performance

Figure 313: Real: group financial performance, 2012/13-2016/17

Figure 314: Real: outlet data, 2012/13-2016/17

Retail offering

Rewe

What we think

Clearer strategy emerges for international operations

Exploiting convenience

Going local

The natural way

Online plans

What next?

Company background

Company performance

Figure 315: Rewe: group* financial performance, 2012-16

Figure 316: Rewe: outlet data, 2012-16

Retail offering

J Sainsbury (UK)

What we think

Looking to drive synergies from the Home Retail Group deal

Pushing ahead with online innovations

Keeping a lid on costs

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

What next?

Company background

Company performance

Figure 317: J Sainsbury (UK)*: group financial performance, 2012/13-2016/17

Figure 318: J Sainsbury (UK): outlet data, 2012/13-2016/17

Retail offering

Schwarz Group (Lidl)

What we think

Lidl lands in the US

Further expansion

Lidl goes on the attack in Germany

Further gains in the UK

Embracing technology

Lidl bets big on clothing

Figure 319: Esmara by Heidi Klum at Lidl UK, September 2017

Online operations at early stages of development

Company background

Company performance

Figure 320: Schwarz Group: group sales performance, 2012/13-2016/17

Figure 321: Schwarz Group: outlet data, 2012/13-2016/17

Retail offering

Spar International

What we think

Capitalising on smaller, more frequent food shopping

Modernisation of larger stores

New health store concept to meet the demands of health-conscious consumers

E-commerce solutions to make shopping as convenient as possible

Food waste scheme prompts positive response

Company background

Company performance

Figure 322: Spar International: Western Europe and Central & Eastern Europe retail sales, by country, 2012-16

Figure 323: Spar International: Western Europe and Central & Eastern Europe outlets, 2012-16

Figure 324: Spar International: Western Europe and Central & Eastern Europe retail sales area, 2012-16

Figure 325: Spar International: Western Europe and Central & Eastern Europe sales per sq m, by country, 2012-16

Retail offering

Tesco

What we think

The turnaround

**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 - Europe - November 2017

Report Price: £2895.00 | \$3843.69 | €3299.43

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

Booker

Logic behind the deal

A consumer downturn?

Company background

Fraud Squad investigation

Company performance

Full year 2016/17

Figure 326: Tesco: sales growth by country in local currency terms, 2015/16-2016/17

First half 2017/18

Figure 327: Tesco: first half sales growth by country in local currency terms, H1 2016/17-H1 2017/18

Online

Tesco Bank

The balance sheet

Figure 328: Tesco Plc: group financial performance, 2012/13-2016/17

Figure 329: Tesco UK: like-for-like sales growth by format, Q1 and Q2 2017/18

Figure 330: Tesco: UK store space by format, 2017

Figure 331: Tesco Plc: outlet data, 2012/13-2016/17

Retail offering

Waitrose

What we think

Store sales decline forces shift in focus

Prioritising footfall and loyalty over profit

Foodservice and click-and-collect drive footfall

What next?

Company background

Company performance

Figure 332: Waitrose: group financial performance, 2012/13-2016/17

Figure 333: Waitrose: outlet data, 2012/13-2016/17

Retail offering

**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