Grocery Multiples: Reconfiguring the Non-food Offer - UK - October 2018

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"Over the past five years pressure has been placed on the supermarket sector in the UK, with the rise of discounters, online and convenience stores taking away a traditional dependence on the larger store format. As such the traditional big four have had to readjust the formats of their larger stores, integrating new non-food and service-based innovations in an effort to drive patronage"
– Nick Carroll , Senior Retail Analyst

This report looks at the following areas:

- **Concessionary partners: does the mini-mall future stack up?**
- **What Asda and Sainsbury's merger means for general merchandise**

The supermarket sector has seen its share of all grocery retail sales decline from 60.5% in 2012 to 52.1% in 2017. Across the period we have also seen growth in the use of discounters, convenience stores and online, ultimately reducing the dependence on the larger store format.

As such the big four grocery multiples, at each of which supermarkets remain their dominant business, have looked to re-evaluate their larger format stores in the wake of falling demand. Expanding their own non-food offer has become a focus for some, with Sainsbury's acquiring Argos, whilst others have looked to give over excess space to others in the retail sector, as Tesco has done with Next for example. Alongside this there has also been a focus on improving in-store foodservice and integrating other new service propositions in an effort to drive patronage.

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