

Supermarkets - Europe - November 2017

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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**

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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

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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

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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

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