

## Supermarkets - UK - November 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

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



“The supermarket sector is expected to return to growth for the first time in four years in 2017. However it is still a sector fighting against the grain of current shopping habits. Consumers continue to move to more fluid and frequent habits and the discounters continue to present a considerable thorn in the side of the leading players.”

– **Nick Carroll, Senior Retail Analyst**

This report looks at the following areas:

- **This season's must have accessory: wholesale**
- **Trading up/down/sideways: What falling real incomes could mean for the sector**
- **Amazon and Whole Foods: for now file under 'potential'**

The main focus of this Report is the supermarkets of the market leaders – those stores in which people have historically done their main shop. Combining market, company and our consumer research data, we analyse why the shift away from supermarkets has occurred, what the state of play is in 2017 and where the sector is heading next.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://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](mailto: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 - UK - November 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

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

## Table of Contents

### Overview

What you need to know  
Products covered in this Report

### Executive Summary

The market

Real incomes now falling

Figure 1: Real incomes: CPIH versus annual weekly earnings (excluding bonuses) Jan 2014-Oct 2017

Consumer spending on food and drink accelerates

Grocery retail sales return to more substantial growth

Figure 2: All food retail sales (incl. VAT), 2012-22

Supermarkets sales also expected to return to growth...

Figure 3: Supermarkets' market size and forecast (inc. VAT), 2012-22

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

Figure 4: Estimated channels of distribution for grocery retail sales, 2016

Leading retailers

Tesco remains the dominant player

Figure 5: 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 6: Attitudes towards and usage of selected brands, September 2017

The consumer

Levels of top-up shopping continue to rise

Figure 7: Grocery shopping behaviour, September 2015-17

A majority continue to spend the most in supermarkets

Figure 8: Types of stores where consumers spend the most, September 2016 and 2017

Meal planning influences shopping behaviour

Figure 9: How grocery shoppers plan meals in advance, September 2017

Tesco the most used retailer in the UK

Figure 10: Grocery retailers used for primary and secondary shops, September 2017

Nine in ten supermarket shoppers purchase non-foods

Figure 11: Types of non-foods purchased in supermarkets, September 2017

Consumers have noticed price rises

Figure 12: Attitudes to pricing and trading down, September 2017

What we think

### Issues and Insights

This season's must have accessory: wholesale

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Supermarkets - UK - November 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

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

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...

...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 13: Food and drink inflation, 2012- October17

Consumer spending power falls

Figure 14: Average weekly earnings by consumer price index, Jan 2014-Sep 2017

Consumer confidence has taken a hit but is holding up overall

Figure 15: Consumer confidence: current financial situation vs sentiment for the coming year, Jan 2014 – Sep 2017

Private renting increases

Figure 16: UK household tenure status, 2011-16

## Consumer Spending on Food and Drink

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

Spending on food

Figure 18: Annual % change in the value, volume and prices in the food category, 2012-17

How food spending breaks down

Figure 19: Composition of consumer spending on food, categories as a % of total spending, 2016

Spending on non-alcoholic drinks

Figure 20: Annual % change in the value, volume and prices in the non-alcoholic beverages category, 2012-17

Spending on alcoholic drinks

Figure 21: Annual % change in the value, volume and prices in the alcoholic beverages category, 2012-17

Figure 22: 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 23: All food retail sales (inc. VAT), 2012-22

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Supermarkets - UK - November 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

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

Figure 24: All food retail sales, market size and forecast, 2012-22

Supermarket sector predicted to return to growth...

Figure 25: Supermarkets' market size and forecast (inc. VAT), 2012-22

Figure 26: Supermarkets: market size and forecast (inc. VAT), 2012-22

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

Figure 27: 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 28: Estimated channels of distribution for grocery retail sales, 2016

However supermarkets are increasingly sharing consumer baskets

Figure 29: 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 30: Who is responsible for grocery shopping in the household, September 2017

Grocery shopping habits are becoming more fluid

Figure 31: Grocery shopping behaviour, September 2015-17

Younger consumers more likely to do a singular main shop

Figure 32: Shopping behaviour by age, September 2017

However such behaviours are not static

Figure 33: 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 34: Types of stores where consumers spend the most, September 2016-2017

Who spends the most in supermarkets?

Figure 35: Types of stores where consumers spend the most, by age, September 2017

Figure 36: Types of stores where consumers spend the most, by parental status, September 2017

Figure 37: Types of stores where consumers spend the most, by type of area lived in, September 2017

The influence of family on shopping habits

Figure 38: Parental influence on grocery shopping, September 2017

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Supermarkets - UK - November 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

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

## The Impact of Planning and Eating Out

Most do some form of meal planning

Figure 39: How grocery shoppers plan meals in advance, September 2017

Figure 40: How grocery shoppers plan meals in advance, by age, September 2017

How does meal planning affect grocery shopping behaviour?

Figure 41: 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 42: Frequency of eating out, September 2017

Figure 43: Frequency of eating out, by age, September 2017

How does eating out affect shopping behaviours?

Figure 44: Frequency of eating out, by grocery shopping behaviour, September 2017

## Retailers Used

Tesco the UK's most visited grocery retailer

Figure 45: Grocery retailers used, September 2017

Figure 46: Trend of grocery retailers used, September 2015 -2017

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

Figure 47: Grocery retailers used for primary and secondary shops, September 2017

Less than one in ten shop with one retailer

Figure 48: Repertoire of secondary retailers used, September 2017

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

Figure 49: Where leading retailers' primary shoppers also shop, September 2017

## Retailer Demographic Comparison

Tesco attracts the highest level of young secondary shoppers

Figure 50: Leading grocery retailers used for primary and secondary shops, by age, September 2017

Figure 51: The discounters: primary and secondary shoppers, by age, September 2017

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

Figure 52: Leading grocery retailers used for primary and secondary shops, by age, September 2017

Tesco and Sainsbury's strongest in the capital

Figure 53: Leading retailers' primary shoppers, by region lived in, September 2017

Figure 54: Leading Retailers' secondary shoppers, by region lived in, September 2017

Asda strong in the lower socio-economic groups

Figure 55: Leading grocery retailers used for primary and secondary shops, by socio-economic group, September 2017

Figure 56: 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 57: Types of non-foods purchased in supermarkets, September 2017

Clothing purchasing peaks amongst Asda shoppers

Figure 58: Types of non-foods purchased in supermarkets, by retailer where the most money is spent in a typical month, September 2017

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Supermarkets - UK - November 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

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

## Consumers tend to favour a few categories

Figure 59: Types of non-foods purchased in supermarkets, repertoire analysis, September 2017

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

Figure 60: Attitudes to non-foods in supermarkets, September 2017

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

Figure 61: Types of non-foods purchased in supermarkets, September 2017

## Attitudes to Prices and Loyalty Schemes

### Consumers have noticed price increases

Figure 62: Attitudes to pricing and trading down, September 2017

### Older consumers most likely to have noticed price increases

Figure 63: Agreement to statements about pricing and trading down, by age, September 2017

### A move to own-brand?

Figure 64: Mintel Grocery Tracker: attitudes to own v private label, March 2016-Sep 2017

### Loyalty schemes

Figure 65: Attitudes to loyalty schemes, September 2017

Figure 66: 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 67: Leading grocery retailers: net sales, 2012-16

### Consolidation amongst the symbol groups

Figure 68: Leading grocery retailers: Store numbers, 2012-16

Figure 69: Leading grocery retailers: annual sales per outlet, 2012-16

### Sales area and densities

Figure 70: Leading grocery retailers: total sales area, 2012-16

Figure 71: Leading grocery retailers: annual sales per sq m, 2012-16

### Operating profits and margins

Figure 72: Leading grocery retailers: operating profits, 2012-16

Figure 73: Leading grocery retailers: operating margins, 2012-16

## Market Share

### Tesco is the market leader

Figure 74: Leading grocery retailers: share of all grocery retail sales, 2016

Figure 75: Leading grocery retailers: share of all grocery retail sales, 2012-17

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Supermarkets - UK - November 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

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

## Could Aldi crack the top four?

Figure 76: 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 77: Food, non-food standard classifications, 2017

#### Convenience comparison overview

Figure 78: UK leading food retailers' hypermarket store format: Convenience comparison overview split, November 2017

Figure 79: UK leading food retailers' superstore format: Convenience comparison overview split, November 2017

Figure 80: UK leading food retailers' smaller supermarkets and discounters: Convenience comparison overview split, November 2017

#### Detailed convenience comparison split

Figure 81: UK leading food retailers' hypermarket store format: Convenience comparison detailed split, November 2017

Figure 82: UK leading food retailers' superstore format: Convenience comparison detailed split, November 2017

Figure 83: UK leading food retailers' smaller supermarkets and discounters: Convenience comparison detailed split, November 2017

#### Food and drink categories split

Figure 84: 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 85: Leading food retailers, estimated Sales Mix, 2016

Figure 86: Leading food retailers: Category sales as % total sales, 2016

Figure 87: Leading food retailers, Sales density by broad category, 2016

Figure 88: Leading food retailers: Estimated share of key product markets, 2016

### Brand Research

#### What you need to know

##### Brand map

Figure 89: Attitudes towards and usage of selected brands, September 2017

##### Key brand metrics

Figure 90: Key metrics for selected brands, September 2017

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

Figure 91: Attitudes, by brand, September 2017

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

Figure 92: Brand personality – Macro image, September 2017

##### The big four trade on being reliable and accessible

Figure 93: Brand personality – Micro image, September 2017

#### Brand analysis

Tesco

Sainsbury's

Asda

Morrisons

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Supermarkets - UK - November 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

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

Aldi  
The Co-op  
Lidl  
M&S Simply Food  
Iceland  
Waitrose  
Ocado  
Amazon and Whole Foods

## Online

Over half do online grocery shopping

Figure 94: Usage of online grocery shopping, December 2016

Online grocery is only around 6% of total sector sales

Figure 95: Estimated breakdown of sector sales, by channel, 2012-17

Delivery passes on the rise

Figure 96: Ownership of delivery passes, December 2016

Tesco is the dominant online player but losing market share

Figure 97: 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 98: 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 99: 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 100: 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 101: 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

## Aldi

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)



# Supermarkets - UK - November 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

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

## What we think

The key markets

Germany

UK

US

Australia

Further expansion

Company background

Company performance

Figure 102: Aldi: Estimated group sales performance, 2012-16

Figure 103: 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 104: Asda Group Ltd: Group financial performance, 2012-16

Figure 105: Asda Group Ltd: 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 106: The Co-operative Food: group financial performance, 2012/13-2016/17

Figure 107: The Co-operative Food: outlet data, 2012/13-2016/17

Retail offering

## Iceland Foods

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Supermarkets - UK - November 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

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

### What we think

- New concept stores continue to be rolled out
- Quality focus for products
- Loyalty programme to move to existing payment cards
- Company background

### Company performance

- Figure 108: Iceland Foods Ltd: group financial performance, 2012/13-2016/17
- Figure 109: Iceland Foods Ltd: 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 110: Esmara by Heidi Klum at Lidl UK, September 2017

### Online operations at early stages of development

### Company background

### Company performance

- Figure 111: Schwarz Group: Group sales performance, 2012/13-2016/17
- Figure 112: Schwarz Group: Outlet data, 2012/13-2016/17

### 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 113: Marks & Spencer (UK Food): group sales performance, 2012/13-2016/17
- Figure 114: Marks & Spencer (UK Food): food outlets, by format, 2012/13-2016/17
- Figure 115: Marks & Spencer (UK Food): outlet data, 2012/13-2016/17

### Retail offering

## Wm Morrison Group

### What we think

- 'Fresh look' supermarket format driving store sales growth

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Supermarkets - UK - November 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

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

### 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 116: Wm Morrison Group: group financial performance, 2012/13-2016/17

Figure 117: Wm Morrison Group: outlet data, 2012/13-2016/17

Retail offering

### 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

Diversifying into new sectors

What next?

Company background

Company performance

Figure 118: Ocado Group plc: group financial performance, 2011/12-2015/16

Figure 119: Ocado Group plc: Key performance metrics, 2012/13-2015/16

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

What next?

Company background

Company performance

Figure 120: J Sainsbury (UK)\*: group financial performance, 2012/13-2016/17

Figure 121: J Sainsbury (UK): outlet data, 2012/13-2016/17

Retail offering

### Spar International

What we think

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Supermarkets - UK - November 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

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

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

Figure 123: Spar International: Western Europe and Central & Eastern Europe Outlets, 2012-16

Figure 124: Spar International: Western Europe and Central & Eastern Europe retail sales area, 2012-16

Figure 125: Spar International: Western Europe and Central & Eastern Europe sales per sq m, by country, 2012-16

Retail offering

### Tesco

What we think

The turnaround

Booker

Logic behind the deal

A consumer downturn?

Company background

Fraud Squad investigation

Company performance

Full year 2016/17

Figure 126: Tesco: sales growth by country in local currency terms, 2015/16-2016/17

First half 2017/18

Figure 127: Tesco: first half sales growth by country in local currency terms, H1 2016/17 – H1 2017/18

Online

Tesco Bank

The balance sheet

Figure 128: Tesco Plc: group financial performance, 2012/13-2016/17

Figure 129: Tesco UK: like-for-like sales growth by format, Q1 and Q2 2017/18

Figure 130: Tesco: UK store space by format, 2017

Figure 131: 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?

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Supermarkets - UK - November 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

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

Company background

Company performance

Figure 132: Waitrose: group financial performance, 2012/13-2016/17

Figure 133: Waitrose: outlet data, 2012/13-2016/17

Retail offering

### Appendix – Data Sources, Abbreviations and Supporting Information

Data sources

Consumer research methodology

Financial definitions

Abbreviations

### Appendix – Market Size and Forecast

Forecast methodology

### Appendix - Detailed Space Allocation

Figure 134: UK leading food retailers hypermarket store format: detailed space allocation, November 2017

Figure 135: UK leading food retailers superstore format: detailed space allocation, November 2017

Figure 136: UK leading food retailers smaller supermarkets and discounters: detailed space allocation, November 2016

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)