

Supermarkets - Europe - November 2019

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“European supermarkets continue to face the challenges of a mature and increasingly competitive market. While in certain countries of Eastern Europe there is still some room for growth, in most Western European economies the leading players are being forced to act defensively and to continue to innovate not to lose share to the existing competition.”

– **Armando Falcao, European Retail Analyst**

This report looks at the following areas:

Supermarkets and discounters fight for the leadership in the various countries and the main international discounters, Aldi and Lidl have continued to gain relevance by expanding their offering and investing to improve the overall shopping experience in their stores.

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Figure 316: Real (Germany): group sales performance, 2014/15-2018/19

Figure 317: Real (Germany): outlet data, 2014/15-2018/19

Retail offering

Rewe

What we think

Rewe looks to convenience segment

Technology investments in product scanning, payments and traceability

War on plastic continues

eCommerce developments

Company background

Company performance

Figure 318: Rewe: Group financial performance, 2014-18

Figure 319: Rewe: Outlet data, 2014-18

Retail offering

J Sainsbury

What we think

Sainsbury's six new strategic priorities

Sainsbury's and Asda merger blocked by CMA

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Integration of the Argos business remains challenging

Digital update to Nectar loyalty scheme

Unmanned stores

Company background

Company performance

Figure 320: J Sainsbury (UK): Group financial performance, 2014/15-2018/19

Figure 321: J Sainsbury (UK): Outlet data, 2014/15-2018/19

Retail offering

Schwarz Group (Lidl)

What we think

Lidl pushing online growth in more markets

UK anticipates online launch

Kaufland seeking a road to recovery

Lidl opens smallest store

Adapting to shopper trends

Company background

Company performance

Figure 322: Schwarz Group: Group sales performance, 2014/15-2018/19

Figure 323: Schwarz Group: Outlet data, 2014/15-2018/19

Retail offering

Spar International

What we think

Maximising foodservice opportunities

Positioned to capitalise on shopping locally and food provenance

Checkout-free shopping with scan, pay and go

Rollout of healthy food product ranges across European markets

Tackling food waste and saving consumers money at the same time

Company background

Company performance

Figure 324: Spar International: Selected Western Europe and Central & Eastern Europe retail sales, by country, 2014-18

Figure 325: Spar International: Selected Western Europe and Central & Eastern Europe stores, by country, 2014-18

Figure 326: Spar International: Selected Western Europe and Central & Eastern Europe retail sales area, 2014-18

Retail offering

Tesco

What we think

Dave Lewis decides to leave the business

Tesco counter cost cuts expected to hit 9,000 jobs

Metro: simplifying store operations

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New Clubcard subscription service

Booker acquires Best Food Logistics

Tesco continues to invest in Jack's

Increased investment in Asia

Company background

Company performance

Figure 327: Tesco: Central Europe and Asia, like-for-like growth, Q1 2017/18-Q2 2019/20

Figure 328: Tesco Plc: Group financial performance, 2014/15-2018/19

Figure 329: Tesco plc, group outlet data, 2014/15-2018/19

Retail offering

Waitrose & Partners

What we think

Radical management restructuring will bring Waitrose and John Lewis brands closer

Waitrose and John Lewis testing new joint loyalty scheme

End of Ocado supply deal a blow

Expanded order fulfilment options offering greater flexibility and convenience

Upskilling food counter staff

Unique at-home tasting experiences

Taking action on plastics and food waste

Company background

Company performance

Figure 330: Waitrose & Partners: Group financial performance, 2014/15-2018/19

Figure 331: Waitrose & Partners: Outlet data, 2014/15-2018/19

Retail offering

Wm Morrison Group

What we think

Breathing new life into its stores and loyalty scheme

Same-day online delivery

Capitalising on growth in convenience store sector through wholesale tie-ups

Expanded own online shop delivery options

Reducing plastic usage and minimising food waste

Company background

Company performance

Figure 332: Wm Morrison Group: Group financial performance, 2014/15-2018/19

Figure 333: Wm Morrison Group: Outlet data, 2014/15-2018/19

Retail offering

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