

Supermarket Retailing - Brand vs. Own-brand - Ireland - November 2019

Report Price: £1095.00 | \$1478.58 | €1232.31

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



“Own-label goods continue to perform well. Irish consumers consider own-label products to be just as good as branded items and they are increasingly turning to them when buying everyday items. Brands will need to demonstrate their value and tell their unique story to gain consumers’ attention in everyday categories and boost purchase intention.”

– James Wilson, Research Analyst

This report looks at the following areas:

Grocery retailing in Ireland remains highly competitive. Tesco continues to perform well but the discounters are attracting more shoppers to their stores with a strong proposition on price and quality that is helping to grow the appeal of own-label products. Consumers show strong agreement that own-label products are just as good as branded alternatives and are increasingly favouring own-label goods within household staple categories. While branded products are favoured in treat categories as consumers trade up to reward themselves, manufacturers will need to do more to demonstrate their value and tell their unique story to increase consumers’ purchase intention of everyday items.

**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

Supermarket Retailing - Brand vs. Own-brand - Ireland - November 2019

Report Price: £1095.00 | \$1478.58 | €1232.31

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
Issues covered in this Report

Executive Summary

The market

Figure 1: Estimated total grocery retail sales vs supermarket sales, IoI, 2014-19

Forecast

Figure 2: Indexed estimated total grocery retail sales, NI and RoI, 2014-24

Market factors

Food prices rising in UK/NI, flat in RoI

NI consumers' spending power declines

Tesco expands its own-label plant-based food range

Lidl reducing salt and sugar levels in own-label products

Companies, innovations and brands

The consumer

Grocery shopping mainly a single-person activity

Figure 3: Who is responsible for the main grocery shop in their household, NI and RoI, September 2019

Tesco leads the NI grocery market

Figure 4: Usage of retailers for main weekly grocery shopping, NI, September 2019

Consumers visit multiple retailers to do the weekly shop

Figure 5: Usage of retailers for main weekly grocery shopping, RoI, September 2019

NI consumers topping up at Tesco and Lidl

Figure 6: Usage of retailers for top-up grocery shopping, NI, September 2019

Tesco and discounters popular top-up shops in RoI

Figure 7: Usage of retailers for top-up grocery shopping, RoI, September 2019

Branded drinks popular among Irish consumers

Figure 8: Consumers' preferences for branded vs own-label groceries, NI and RoI, September 2019

Branded product purchases influenced by price promotions

Figure 9: Motivations to choose a branded product over an own-label product, NI and RoI, September 2019

Consumers agree retailers need to ensure food safety

Figure 10: Agreement with statements relating to supermarkets, NI and RoI, September 2019

What we think

The Market – What You Need to Know

Continued growth expected in Irish grocery market in 2019

Food prices stable in RoI, rising in NI

Supermarkets continue to expand healthy own-label ranges

**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

Supermarket Retailing - Brand vs. Own-brand - Ireland - November 2019

Report Price: £1095.00 | \$1478.58 | €1232.31

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

NI consumers remain financially insecure

Market Size and Forecast

2019 sees growth in value of grocery sales

Figure 11: Estimated total grocery retail sales, IoI, NI and RoI, 2014-24

2019 will see sales grow at Irish supermarkets

Figure 12: Estimated total supermarket retail sales, IoI, NI and RoI, 2014-24

Grocery sales to continue growing through to 2024

Figure 13: Indexed estimated total grocery retail sales, NI and RoI, 2014-24

Own-label sales continue to grow strongly

Figure 14: Estimated own-label grocery retail sales (excluding non-food items), IoI, NI and RoI, 2014-24

Figure 15: Estimated market value of own-label food products vs. the total grocery market (excluding non-food items), all-Ireland, 2014-24

Market Drivers

UK sees food prices rise in 2019

Figure 16: Consumer price inflation (CPI) vs food prices, UK (including NI), January 2018-September 2019

Figure 17: Consumer price inflation (CPI) vs food prices, RoI, January 2018-September 2019

Average grocery spend £41-60 in NI and €81+ in RoI

Figure 18: Average amount that consumers spend each week for household groceries, NI, September 2019

Figure 19: Average amount that consumers spend each week for household groceries, RoI, September 2019

NI consumers continue to see finances squeezed

Figure 20: Financial health of Irish consumers, NI and RoI, September 2018 and September 2019

Sainsbury's/Asda merger blocked

Consumers continue eating less meat

Figure 21: Selective diets that consumers currently adhere to, NI and RoI, June 2018 and June 2019

Figure 22: Number of new food products launched claiming to be plant-based, UK and Ireland, 2014-19

Lidl hits 200 stores in Ireland

Figure 23: Average store growth rate of grocery retailers' store networks, IoI, 2016-19

Lidl reducing unhealthy ingredients in own-label products

Figure 24: Ingredients in food and drink products consumers are concerned about, NI and RoI, June 2018

Companies and Innovations – What You Need to Know

Retailers taking action to tackle food waste

Aldi UK and Ireland joins Ocean Disclosure Project

Sainsbury's announces new store strategy

SuperValu introduces fully compostable shopping bags

Who's Innovating?

Own-label product launches outpace branded goods

Figure 25: Total new food and drink product launches, UK and Ireland, 2014-19

M&S continues to lead on own-label NPD

Figure 26: New own-label food and drink products launched, top 10 companies, UK and Ireland, 2014-19

**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

Supermarket Retailing - Brand vs. Own-brand - Ireland - November 2019

Report Price: £1095.00 | \$1478.58 | €1232.31

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

Bakery driving own-label NPD

Figure 27: New own-label food and drink products launched, UK and Ireland, 2018

Treat categories driving

Figure 28: New branded food and drink products launched, UK and Ireland, 2018

Own-label brands reducing sugar and salt levels

Figure 29: Percentage of own-label food and drink products claiming to be low, no or reduced salt and sugar, UK and Ireland, 2014-19

Companies and Brands

Aldi (RoI only)

Key facts

Positioning and strategy

Brand NPD

Recent developments

Asda (NI only)

Key facts

Positioning and strategy

Brand NPD

Recent developments

Dunnes Stores

Key facts

Positioning and strategy

Brand NPD

Recent developments

Iceland

Key facts

Positioning and strategy

Brand NPD

Recent developments

Lidl

Key facts

Positioning and strategy

Brand NPD

Recent developments

Marks & Spencer

Key facts

Positioning and strategy

Brand NPD

Recent developments

Sainsbury's (NI only)

Key facts

**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

Supermarket Retailing - Brand vs. Own-brand - Ireland - November 2019

Report Price: £1095.00 | \$1478.58 | €1232.31

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

Positioning and strategy

Brand NPD

Recent developments

SuperValu

Key facts

Positioning and strategy

Brand NPD

Recent developments

Tesco

Key facts

Positioning and strategy

Brand NPD

Recent developments

The Consumer – What You Need to Know

Single person mainly responsible for shopping in Irish households

Tesco leads the NI market, while RoI market is highly competitive

Top-up shopping occasion dominated by Tesco and Lidl

Strong preference for own-label products

Promotions encourage consumers to buy branded products

Waste remains high on Irish consumers' agenda

Responsibility for Grocery Shopping

Most consumers claim they are the main grocery shoppers

Figure 30: Who is responsible for the main grocery shop in their household, NI and RoI, September 2019

Irish women the main grocery shoppers

Figure 31: Consumers who are mainly/wholly responsible for grocery retailing in a household, by gender, NI and RoI, September 2019

Figure 32: Consumer who share the responsibility for grocery retailing equally with someone else, by gender, NI and RoI, September 2019

Locations for Main Grocery Shopping

Tesco the preferred retailer for the main weekly grocery shop

Figure 33: Usage of retailers for main weekly grocery shopping, NI, September 2019

Consumers working full-time visit Tesco for main weekly shopping

Figure 34: Usage of Tesco for main weekly grocery shopping, by employment status, NI, September 2019

Lidl grows in popularity among NI consumers

Figure 35: Usage of Lidl for main weekly grocery shopping, NI, 2015-19

Competition high in RoI grocery market

Figure 36: Usage of retailers for main weekly grocery shopping, RoI, September 2019

Women doing the main grocery shop at a supermarket

Figure 37: Usage of selected retailers for main weekly grocery shopping, by gender, RoI, September 2019

Discounters popular among affluent consumers

**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

Supermarket Retailing - Brand vs. Own-brand - Ireland - November 2019

Report Price: £1095.00 | \$1478.58 | €1232.31

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

Figure 38: Usage of Aldi and Lidl for main weekly grocery shopping, by social class, RoI, September 2019

Locations for Top-up Shopping

Tesco popular among top-up shoppers

Figure 39: Usage of retailers for top-up grocery shopping, NI, September 2019

City dwellers topping up at Tesco, rural consumers at Lidl

Figure 40: Usage of Tesco and Lidl for top-up grocery shopping, by location, NI, September 2019

Men are key top-up shoppers

Figure 41: Usage of selected retailers for top-up grocery shopping, by gender, NI, September 2019

Tesco main top-up shop in RoI, but discounters also popular

Figure 42: Usage of retailers for top-up grocery shopping, RoI, September 2019

Gen-Xers topping up at Dunnes

Figure 43: Usage of Dunnes Stores for top-up grocery shopping, by age, RoI, September 2019

Musgrave-owned brands popular top-up shops

Figure 44: Usage of SuperValu and Centra for top-up grocery shopping, by household income, RoI, September 2019

Branded vs Own-label Preferences

Consumers choosing own-label for everyday items

Figure 45: Consumers' preferences for branded vs own-label groceries, NI and RoI, September 2019

Men buying branded goods, women choosing own-label

Figure 46: Consumers who buy branded groceries, by gender, NI and RoI, September 2019

Figure 47: Consumers who buy own-label groceries, by gender, NI and RoI, September 2019

Motivations to Buy Branded Products

Promotions and special offers important in branded purchase decision

Figure 48: Motivations to choose a branded product over an own-label product, NI and RoI, September 2019

Different factors appeal to men and women when buying branded goods

Figure 49: Motivations to choose a branded product over an own-label product, by gender, NI, September 2019

Figure 50: Motivations to choose a branded product over an own-label product, by gender, RoI, September 2019

Exciting flavours important to young consumers in purchase decision

Figure 51: Consumers who would choose a branded product over an own-label product because of more exciting flavours, by age, NI and RoI, September 2019

Attitudes towards Supermarkets

Food safety important to Irish consumers

Figure 52: Agreement with statements relating to supermarkets, NI and RoI, September 2019

Loyalty points on own-label goods appeal to ABC1s

Figure 53: Agreement with the statement 'Extra loyalty points when buying own-label goods would encourage more people to buy them', by social class, NI and RoI, September 2019

Women agree own-label product quality as good as branded

Figure 54: Agreement with statements relating to supermarkets, by gender, NI, September 2019

Figure 55: Agreement with statements relating to supermarkets, by gender, RoI, September 2019

Older consumers think supermarkets need to do more on waste

Figure 56: Agreement with the statement 'Supermarkets should do more to reduce packaging waste', by age, NI and RoI, September 2019

**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

Supermarket Retailing - Brand vs. Own-brand - Ireland - November 2019

Report Price: £1095.00 | \$1478.58 | €1232.31

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

Appendix – Data Sources, Abbreviations and Supporting Information

Data sources

Market size rationale

Generational cohort definitions

Abbreviations

**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