

## Supermarkets: Inc Impact of COVID-19 - Europe - November 2020

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“European supermarkets and discounters stand out in terms of the impact of the COVID-19 pandemic having experienced a strong uptick in demand for food and essentials during 2020.”

– **Armando Falcao, European Retail Analyst**

This report looks at the following areas:

- The impact of COVID-19 on the grocery retailing sector.
- The winners and losers in the grocery retailing sector since the start of the COVID-19 outbreak.
- The growth of the online grocery channel and the boost given to it by the COVID-19 outbreak.
- How people shop for groceries and which retailers they use for main and top-up shops.
- How behaviours of grocery shoppers have changed since the start of the COVID-19 outbreak.

This report focusses on the five major European economies and their leading food retailers. In total, we estimate that these five countries account for two-thirds of all food retailers’ sales in Europe excluding Russia.

In the European Summary, the scope of the report is widened as we look at the key statistics and the key players from other countries beyond the big 5. However, it is still the major retailers from the big five economies, but especially the UK, France and Germany, that dominate. One still has to go down to number 14 in the rankings to find the first retailer (X5 Retail Group) not domiciled in one of the Big 5. Additional details about smaller countries can be found in Mintel’s European Retail Handbook – September 2020 and in the European Retail Rankings, which will be published at the end of the year.

The focus of this report is supermarkets, but the market size used is for all food retailers. Supermarkets dominate food retailing across Europe taking between 85% and 90% of all food retailers’ sales. Some markets continue to see a reverse in the trend towards ever larger stores, especially in the light of the COVID-19 pandemic and consumers opting to shop more locally and from smaller players. The trend to larger supermarkets seems to be coming to an end in the more developed markets, with smaller convenience stores and hard discounters growing and taking market share. In addition, food specialists have seen the previous trend of decline reverse as they have fared a little better.

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This report is part of a series of reports, produced to provide you with a more holistic view of this market

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Online to claim over 10% of spending for the first time

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### Expanded food-to-go options and in-store pub

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Aldi challenges shoppers to re-evaluate their preconceptions of its quality offering

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Tesco the most trusted retailer

Sainsbury's considered more ethical than big four rivals

Asda is better value than Morrisons and Sainsbury's

Morrisons has the lowest lifetime usage of the big four retailers

Aldi's experience and value ahead of rival Lidl

Co-op is considered ethical by consumers

Lidl considered the most basic of the retailers

M&S offers an excellent experience

Iceland is basic but good value

Waitrose trust lower than many competitors

Amazon leading the way in innovation

Ocado exclusive and expensive

### Asda Group

What we think

Now under British ownership

Plugging the gap in convenience grocery shopping

One-stop multiple shopping mission destination

Hygiene-centric shopping experience in wake of COVID-19 pandemic

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Avoiding queues during COVID-19 crisis

Rapid online order fulfilment and 'greener' home deliveries

Doubling down on price competitiveness ahead of crucial Christmas trading period

Sustainability test store and 'green' price pledge

Supporting the elderly and vulnerable during the COVID-19 crisis

Company background

Company performance

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Figure 240: Asda Stores Ltd: Outlet data, 2015-19

Retail offering

## Marks & Spencer (UK food)

What we think

Entire range of food finally available to buy online

Shifting to contact-free shopping with expansion of checkout-free service

Appointment grocery shopping service to avoid COVID-19 lockdown queues

Debunking high price myth

Food-to-go vending machine

Helping customers back on wasted food and reduce plastic pollution

Helping NHS staff and the vulnerable during the COVID-19 pandemic

Company background

Company performance

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Figure 243: Marks & Spencer (UK food): Outlet data, 2015/16-2019/20

Retail offering

## J Sainsbury

What we think

One-stop multiple mission shopping destinations

Neighbourhood store expansion to meet the demand for top-up grocery shopping

On-demand grocery delivery service

Exploring new locations to bring food and household products to customers

Accelerating roll-out of scan and go

Ramping up loyalty scheme promotions amid the toughening trading conditions

In-store product refill stations to cut back on the use of plastic

Supporting communities and the most vulnerable during pandemic

Company background

Company performance

Figure 244: J Sainsbury: Group financial performance, 2015/16-2019/20

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Figure 246: J Sainsbury: Outlet data, 2015/16-2019/20

Retail offering

## Spar International

What we think

- Expanded ecommerce operation to meet online demand
- Store format innovation to meet specific community needs
- Making in-store shopping safer, quicker and more convenient
- A one-person concept shop with scalable pop-up opportunities
- Helping customers avoid queueing for stores
- Reducing food waste at both store and consumer level
- Supporting local communities throughout the COVID-19 pandemic

Company background

Company performance

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- Figure 248: Spar International: Western Europe and Central & Eastern Europe stores, by country, 2015-19
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Retail offering

## Tesco

What we think

- Boosting price competitiveness when value is uppermost in shoppers' minds
- Cashless store experience aimed at shoppers in a hurry
- Free and more eco-friendly online deliveries
- On-demand grocery essentials delivery service by drones
- Cutting down on food and plastic waste
- Pop-up stores offering 24-hour access to essential grocery products
- Supporting struggling local producers during COVID-19 crisis

Company background

Company performance

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- Figure 251: Tesco Plc: Outlet data, 2015/16-2019/20

Retail offering

## Waitrose & Partners

What we think

- Expanded delivery service to support more people shopping online
- Virtual shopping services to make online shopping easier for customers staying away from stores
- One-stop shopping convenience
- Making grocery shopping more affordable during these uncertain times

Company background

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## Company performance

Figure 252: Waitrose: Group financial performance, 2015/16-2019/20

Figure 253: Waitrose: Outlet data, 2015/16-2019/20

## Retail offering

## Wm Morrison Group

### What we think

Speedier online grocery deliveries

More reasons for shoppers to visit stores

Slashing prices to be more competitive

1,000 new local products to meet demand for more locally-produced products

Saved 100 tonnes of food from going to waste

Supporting struggling suppliers, frontline health workers and the vulnerable

A more environmentally friendly Christmas

### Company background

### Company performance

Figure 254: Wm Morrison Group: Group financial performance, 2015/16-2019/20

Figure 255: Wm Morrison Group: Outlet data, 2015/16-2019/20

## Retail offering

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