



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

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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



"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

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

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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

Figure 245: J Sainsbury: Estimated Ex-VAT Retail financial breakdown, 2017/18-2020/21

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**

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- **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**

Figure 247: Spar International: Western Europe and Central & Eastern Europe retail sales, by country, 2015-19

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

Figure 249: Spar International: Western Europe and Central & Eastern Europe retail sales area, 2015-19

- **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**

Figure 250: Tesco Plc: Group financial performance, 2015/16-2019/20

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**

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- **Making grocery shopping more affordable during these uncertain times**

- **Company background**

- **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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