

Supermarkets - France - 2022

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This report looks at the following areas:

- The impact of the cost-of-living crisis on the grocery retailing sector
- The performance of the major grocery retailers in 2021
- The main channels used to purchase food and drink and how this is evolving
- How grocery shopping behaviours have changed as a result of COVID-19 and the cost of living crisis
- The role of online and the impact of online-only specialists
- The impact of the cost of living crisis on consumer shopping behaviours and attitudes towards sustainability.

Price rises on food and drink have been outpacing overall inflation in France during the second half of 2022. Inflation in the category reached 13% in November 2022 and it is set to come in at 6.8% for 2022 as a whole.

The government has put a shield on energy price rises, but French consumers are still hurting and many are looking to trade down or having to buy less food. Grocery retailers are doing their best to mitigate price rises, but their higher costs are increasingly having to be passed on to customers. We expect to see growth of 8% in grocery retailers' sales in 2022, but much of this is being driven by higher prices, and in real terms, spending is falling.

The discount sector is benefiting from the cost-of-living crisis with 68% of grocery shoppers telling us that they are shopping more at discounters as a result. As people have returned to work in town centres, convenience stores are proving another area of growth, and many retailers are expanding their portfolio of these stores.

There are opportunities for retailers to grow the contribution from own-label and to better utilise loyalty schemes to avoid losing customers to other value-led rivals. Equally retailers should not forget their more affluent customers,



"The cost-of-living crisis is causing real pain for many French consumers and the grocery retailers have been competing for ways to support their customers and prevent them drifting to more value-led rivals. These have included price freezes on basic items, expanding own-label and new subscription-based loyalty schemes."

- **Natalie Macmillan, Senior European Retail Analyst, December 2022**

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targeting them with other forms of value around issues such as food waste, convenience and health.

What's included

- Executive Summary
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