Supermarkets - Europe - 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.**

In the vast majority of European countries, food retailers' sales recorded growth in 2021, with the highest increases seen in Bulgaria (11.3%), Norway (11%) and Hungary (7.9%). Food retailers have been one of the most resilient sectors. Considered as essential retailers during the pandemic, they were permitted to continue trading even as many other retailers had to close. Equally, as people could not spend their money on eating out, many spent more on food and drink to be consumed at home. It is clear that the food retailers retained momentum in 2021 across Europe as society only gradually opened up, and over 2022 price rises have resulted in higher turnover, despite many shoppers looking to trade down or buy less.

In 2022, European countries saw the impact of the cost of living crisis and the conflict in Ukraine on their food retailing sectors to different degrees. Across Europe, for full year 2022, we project food retailers' sales to have continued to rise after 2.6% growth in 2021.

Value and price will remain important for the foreseeable future, potentially creating a competitive advantage for discounters over supermarkets and other grocers with higher price points. Because their product assortment is targeted to essential customer needs, discounters like Lidl and Aldi are well-positioned to capitalise on grocery shoppers looking to save money on everyday food

"The grocery sector retained momentum in 2021 across Europe as society only gradually opened up, and over 2022 inflation has resulted in higher turnover, despite many shoppers trading down or buying less."
- Utku Tansel, European Retail Analyst

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items. The challenge facing discounters is to convert more affluent top-up grocery shoppers into primary customers. Given discounters typically offer a smaller product offering than mainstream supermarkets, the ability to do a full shop will be key to achieving this.

It is important to note that, with their buying power, extensive and growing own-label ranges as well as established and expanding loyalty schemes, grocery retailers also have the necessary tools at their disposal to enable them to protect their market position, even if it means absorbing some cost increases rather than passing them on to customers in their entirety in the short term. There is an opportunity for further segmentation of the online grocery market, particularly at the premium end with rapid delivery services. Furthermore, grocery retailers could also take a strong position on sustainability, highlighting their eco-friendly credentials since many consumers are now showing a greater interest in this area.

For the first time we asked those we surveyed which grocery loyalty/membership programmes they are members of. Our research confirms that there is a good opportunity to strengthen loyalty levels among consumers when shopping for groceries. With 64% of Spanish, 60% of French, 58% of Italian, and 53% of German grocery shoppers agreeing that loyalty/membership scheme promotions have made them shop with one grocery retailer over another in the last 12 months, retailers can really strengthen and consolidate loyalty levels among their customers by incentivising them to spend more of their grocery budgets in their stores and not those of rivals.

Additionally, our survey identifies the fight against food waste as fast becoming a priority among European consumers. A confluence of concerns about saving money and not wishing to throw food away because it is not sustainable has contributed to the issue of food waste rising up the agenda and our research finds that almost nine in ten (89%) of Italian, 84% of French, 79% of Spanish, and almost three quarters (74%) of German grocery shoppers have actively tried to reduce the amount of food and drink they waste in the last 12 months. Grocers could remove best-before dates on some food and drink items to address this concern. As such, almost eight in ten (78%) of French, 66% of both German and Spanish, and almost half (49%) of Italian grocery shoppers think that removing best-before dates on some food and drink products would help reduce food waste.

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