

Online Grocery Retailing - Europe - 2023

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This report looks at the following areas:

- The impact of the cost-of-living crisis on the online grocery retailing sector
- Current level of online grocery shopping and how people receive their orders; whether people are shopping online for groceries more often
- Which companies people shop online for groceries with
- Attitudes towards certain aspects of online grocery shopping
- The strategies of the major grocery retailers relating to online
- Opportunities for expansion of the market.

Having been turbocharged by the COVID pandemic in 2020/21, online grocery retailing went into negative growth territory in 2022 across the five leading economies of Europe. Overall, the European online grocery retail market saw a decline of 5.9% as the market continued to rebalance post lockdowns. This means a market size of some €47.6 billion for 2022.

The cost-of-living crisis has accelerated food prices and they have continued to climb in 2023. Consumers are feeling the economic squeeze and household finances are coming under pressure. It is clear that keeping grocery budgets down has become more important over the past year so any savings from promotions may influence existing customers and act as a catalyst to encourage people to switch online grocery retailers. Indeed, our consumer survey for this report reveals that between 84% (in Spain) and almost seven in ten (69%) in Italy tend to order whatever products are on promotion (eg discounts, loyalty card/membership deals).

Loyalty/membership schemes, in particular, have the potential to be a powerful weapon for online grocery retailers. These can help retailers gain a bigger market share. Online grocery retailers can use cross-category bundle deals, promote low-cost meals and even engage with the consumer by allowing them to choose which brands they wish to receive extra discounts on.



“Having registered a strong uptick in sales at the height of the COVID-19 pandemic over 2020/21, the European online grocery retailing market entered correction territory in 2022 posting a decline of just under 6%.”

– Utku Tansel, European Retail Analyst

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Between a third and just over half of European online grocery shoppers said they would feel comfortable having drivers come inside their home to unpack groceries. The more we see such services, the more of an impact they will have on consumer expectations. Expectations around delivery and customer service are constantly changing and soon same-day delivery may not be good enough, regardless of the pressure this may place on brands and retailers. Going forwards we are likely to see delivery services focus on improving convenience and efficiency for shoppers.

But consumers also have strong feelings about sustainability when it comes to grocery shopping and this provides opportunities for retailers to differentiate themselves through their actions. Indeed, more than eight in ten online grocery shoppers in both Spain (82%) and Italy (81%), and around seven in ten in France (70%) and Germany (69%) say they would order from a retailer that offers products in recyclable packaging over one that doesn't. Furthermore, some 44%-52% across the tracked markets would be happy to pay a small fee to offset the emissions of their grocery deliveries.

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