

Supermarkets - Italy - November 2017

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“The Italian economy is showing signs of recovery and this is reflected in the improved performances reported by many of the top grocery retailers. The major players in the sector have also been increasing investment in improving their offer, both in-store and online. However, Italian consumers are still very price-conscious and we expect them to remain so for the foreseeable future.”

– **Michael Oliver, Senior Retail Analyst**

This report looks at the following areas:

- Who shops for groceries
- Shopping for groceries in-store vs online
- Grocery retailers used
- Factors that could be improved at grocery retailers

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DID YOU KNOW?

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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 - The facts
 - The implications
- Is it finally the time for online grocery to take off in Italy?
 - The facts
 - The implications

The Market – What You Need to Know

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Consumer spending drives GDP increase
 Inflation almost negligible
 Grocers take three-quarters of spending on food drink
 Good growth in 2016 but not as high as the previous year
 A return to slightly stronger growth is predicted

Spending and Inflation

Italian economy is still weak

Consumer spending drives GDP increases

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 Rivals enhance own brand and seek to develop improved online offers
 Coop Italia retains market leadership
 Online in Italy: Small and underdeveloped but bubbling under

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Coop Italia reasserts its position
 Conad invests for growth
 Selex growth outstrips its main rivals
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Shopping online for food

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Conad unconvinced about online grocery

Amazon trying to secure a slice of online grocery business

The Consumer – What You Need to Know

Responsibility falls on female consumers

Consumers still reluctant to embrace online

Coop Italia still the most popular primary shopping destination

Consumers want to see fresh food improvements

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More than half responsible for grocery shopping

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Most want better quality fresh food

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Abbreviations

Data sources

ISTITUTO CENTRALE DI STATISTICA (ISTAT) – Rome

EUROSTAT – Luxembourg

PIANETA DISTRIBUZIONI, a report produce by Largo Consumo

Auchan

What we think

Single brand simplifies relationship with customers

Selling off non-core businesses

Stronger buying links with Système U but closer relationship ruled out

An expanding presence in Eastern Europe

What next?

Company background

Company performance

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Retail offering

Carrefour

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A new boss, a new plan

Core strength in food growing strongly

Expanding convenience formats

Online evolving

Company background

Company performance

Group

France

Rest of Europe

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Figure 280: Carrefour: outlet data, 2012-16

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Retail offering

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Retail offering

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Retail offering

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