

## Supermarkets - UK - Nov 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“During an uncertain period, demand in the grocery sector has held up well. Within this the underlying demographic shifts continue to see sales move away from larger-format stores, but they remain the format that attracts the majority of two thirds of consumers’ grocery budgets.”

– Nick Carroll, Associate Director of Retail Research

This report looks at the following areas:

- **2010-19: A review**
- **2030: The demographic and technological drivers of shopping behaviour**
- **2030: The channels and players that will succeed**

Our consumer data further underlines the shifts in the market. Whilst the majority continue to spend the most in a typical month in supermarkets (63%), this number fell once more year-on-year with online seeing the biggest growth, particularly among those aged 25-44. As the leading players look to differentiate themselves, own-brand is becoming increasingly key with 57% seeing this as the main difference between the supermarket retailers. Food counters are also seen as a differentiating factor by 59%, although 34% find using such services as intimidating, whilst 49% think the range of non-foods is a key reason to visit.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](https://store.mintel.com)

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Supermarkets - UK - Nov 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

What you need to know  
Products covered in this Report

### Executive Summary

The market

Real incomes continue to grow but there is still uncertainty in the market

Figure 1: Average weekly earnings, by consumer price index, January 2016-September 2019

Spending on food and drink slowed in 2018

Supermarkets on track to record third consecutive year of growth in 2019

Figure 2: All food retail sales (inc. VAT), 2014-24

Figure 3: Supermarkets' market size and forecast (inc. VAT), 2014-24

Despite growth supermarkets continue to lose share of spending in the sector

Figure 4: Estimated breakdown of all grocery retail sales, by channel, 2013-19

Companies and brands

Tesco and Booker account for a quarter of the market

Figure 5: Leading grocery retailers: Share of all grocery retail sales, 2018

M&S gets a new look as it aims for more big-basket shoppers

Figure 6: M&S Clapham, November 2019

Tesco scores high on trust

Figure 7: Key metrics for selected brands, October 2019

The consumer

The number doing a 'main shop' only ticks up once more

Figure 8: How grocery shoppers typically shop, 2015-19

Supermarket use continues to fall

Figure 9: Store format where the most is spent in a typical month, 2016-19

Over half of grocery shoppers use Tesco on a monthly basis

Figure 10: Grocery retailers used, August 2019

Sainsbury's struggles to capture younger primary shoppers

Figure 11: Leading grocery retailers used for primary and secondary shops, by age, August 2019

Own-brand crucial to differentiation...

Figure 12: Attitudes towards own-brand, by age, August 2019

...as are food counters

Figure 13: Attitudes towards food counters in supermarkets, August 2019

The debate between manned and self-service checkouts continues

Food waste and plastic still key considerations

Figure 14: Ethical considerations of grocery shoppers, by rank, August 2019

Plastic reduction can improve the look of stores

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Supermarkets - UK - Nov 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 15: Attitudes towards packaging, recycling and dietary products, August 2019

What we think

## Issues and Insights

2010-19: A review

The facts

The implications

2030: The demographic and technological drivers of shopping behaviour

The facts

The implications

2030: The channels and players that will succeed

The facts

The implications

## The Market – What You Need to Know

Real incomes continue to grow but there is still uncertainty in the market

Spending on food and drink slowed in 2018

Supermarkets on track to record third consecutive year of growth in 2019

Despite growth supermarkets continue to lose share of spending in the sector

## Market Drivers

Overall inflation steady as food and drink prices rise

Figure 16: Food and drink inflation, September 2018-August 2019

Real incomes continue to grow

Figure 17: Average weekly earnings, by consumer price index, January 2016-October 2019

Confidence rises in 2019 amid Brexit uncertainty

Figure 18: Financial confidence tracker, January 2017-September 2019

Main cause of concern around Brexit is cost of living

Figure 19: Consumer views on the impact of the EU referendum on the UK economy, September 2019

Number of homeowners increases

Figure 20: UK household tenure status, 2013-18

## Consumer Spending on Food and Drink

Spending on food and drink remains strong but slowing

Figure 21: Consumer spending on core food and drink categories, 2014-19

Food spending to slow

Figure 22: Annual % change in consumer spending, value and volume, and inflation in food, 2014-19

Food spending breakdown

Figure 23: Breakdown of consumer spending on food, 2018

Spending on non-alcoholic drinks

Figure 24: Annual % change in consumer spending, value and volume, and inflation in non-alcoholic drinks, 2014-19

Alcoholic drinks

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Supermarkets - UK - Nov 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 25: Annual % change in consumer spending, value and volume, and inflation in alcoholic drinks, 2014-19

Figure 26: Breakdown of value spending in the alcoholic drinks category, 2018

### Sector Size and Forecast

Grocery sector continues to see steady growth

Figure 27: All food retail sales (inc. VAT), 2014-24

Figure 28: All food retail sales (inc. VAT) market size and forecast, at current and constant prices, 2014-24

Supermarket sector size

Figure 29: Supermarkets' market size and forecast (inc. VAT), 2014-24

Figure 30: Supermarkets: market size and forecast (inc. VAT), at current and constant prices, 2014-24

Forecast methodology

### Channels of Distribution

Supermarkets still the dominant channel...

Figure 31: Estimated channels of distribution for grocery retail sales, 2018

...but large-format stores continue to lose share of spending

Figure 32: Estimated breakdown of all grocery retail sales, by channel, 2013-19

### The Consumer – What You Need to Know

The number doing a 'main shop' only ticks up once more

Supermarket use continues to fall

Over half of grocery shoppers use Tesco on a monthly basis

Sainsbury's struggles to capture younger primary shoppers

Own-brand crucial to differentiation...

...as are food counters

The debate between manned and self-service checkouts continues

Food waste and plastic still key considerations

### How They Shop

Nine in 10 are responsible for grocery shopping

The recent trend reversed

Figure 33: How grocery shoppers typically shop, 2015-19

25-44s' habits show greatest change

Figure 34: How grocery shoppers typically shop, by age, 2018 and 2019

If established is this a positive trend for supermarkets?

Shopping behaviour is seasonal

Figure 35: How grocery shoppers typically shop, by season, May 2016-March 2019

### Types of Stores Used

Supermarket use continues to edge downward

Figure 36: Store format where the most is spent in a typical month, 2016-19

Younger shoppers more likely to have shifted spend away

Figure 37: Store format where the most is spent in a typical month, by age, August 2019

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Supermarkets - UK - Nov 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Supermarkets hit by newer ways to shop

Figure 38: Store format where the most is spent in a typical month, by parental status and age, August 2019

Figure 39: Store format where the most is spent in a typical month, by lifestage and income, August 2019

## Retailers Shopped With

### Amazon wins more shoppers than ever

Figure 40: Grocery retailers used, August 2019

### Asda struggles to attract top-up shoppers

Figure 41: Trend of grocery retailers used, 2017-19

### Morrisons attracts more top-up shoppers

Figure 42: Grocery retailers used for primary and secondary shops, August 2019

### Over a third shop at more than three stores a month

Figure 43: Repertoire of secondary retailers used, August 2019

### Half of Lidl shoppers top up at Tesco

Figure 44: Where leading retailers' primary shoppers also shop, August 2019

## Retailer Demographic Comparison

### Tesco loses 25-44 primary shoppers

Figure 45: Leading grocery retailers used for primary and secondary shops, by age, August 2019

### Aldi attracts younger primary shoppers

Figure 46: The discounters: primary and secondary shoppers, by age, August 2019

### Morrisons attracts urban shoppers

Figure 47: Leading grocery retailers used for primary and secondary shops, by location, August 2019

### Lidl and Aldi attract equal primary shoppers in London

Figure 48: Leading retailers' primary shoppers, by region, August 2019

Figure 49: Leading retailers' secondary shoppers, by region, August 2019

### Morrisons attracts the most lower-income households

Figure 50: Leading grocery retailers used for primary and secondary shops, by household income bracket, August 2019

### Discounters attract a more affluent shopper base

Figure 51: Aldi and Lidl, primary and secondary grocery shoppers, by household income bracket, August 2019

## The Importance of Own-brand

### Over half think own-brand is a retailer's defining feature

Figure 52: Attitudes towards own-brand, by age, August 2019

### Aldi and Lidl's impact on attitudes towards own-brand

### Tesco doubles down with Exclusively at Tesco

Figure 53: Exclusively at Tesco private-label ranges, 2019

Figure 54: New Sainsbury's private-label ranges, 2019

### Just because it's value doesn't mean it has to look value

Figure 55: Asda value chicken meatballs, 2014 versus 2019

Figure 56: Morrisons value beef curry, 2012 versus 2019

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Supermarkets - UK - Nov 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Food Counters and Added Services

Differentiation key

Food counters seen as a differentiator

Figure 57: Attitudes towards food counters in supermarkets, August 2019

Figure 58: Agreement with statements regarding food counters in supermarkets, by age, August 2019

Non-foods and services create the multi-mission experience

Figure 59: Behaviours towards non-foods and services in supermarkets, August 2019

Figure 60: Behaviours towards non-foods and services in supermarkets, by format where the most is spent in a typical month, August 2019

## The Checkout Experience

Most still use staffed tills at grocery stores

Figure 61: Checkout behaviours of grocery shoppers, August 2019

Modern developments and implications for the large-format sector

Figure 62: Sainsbury's Smartshop app in action, April 2019

What does such tech mean for the supermarket checkout experience?

## Ethical Considerations in Grocery Shopping

Food waste and plastic use still the key issues

Figure 63: Ethical considerations of grocery shoppers, by rank, August 2019

Significant differences in opinion between the generations

Figure 64: Ethical considerations of grocery shoppers, any rank, by age, August 2019

The fight against plastics can lead to better in-store environments

Figure 65: Attitudes towards packaging, recycling and dietary products, August 2019

## Attitudes towards Pricing, Dietary Needs and Stockpiling

EDLP adds convenience but can lessen the excitement

Figure 66: Attitudes towards price and promotions at grocery retailers, August 2019

The rise of dietary demands

Figure 67: Attitudes towards dietary needs, August 2019

A fifth stockpiled products ahead of the October Brexit deadline

Figure 68: Stockpiling behaviours, August 2019

## Leading Retailers – What You Need to Know

Tesco and Booker account for a quarter of the market

M&S gets a new look as it aims for more big-basket shoppers

Online usage being driven by existing users

Tesco scores highly on trust

## Leading Retailers – Key Metrics

Sales

Figure 69: Leading grocery retailers, net sales, 2014-18

Stores

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Supermarkets - UK - Nov 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 70: Leading grocery retailers: Store numbers, 2014-18

Figure 71: Leading grocery retailers: Annual sales per outlet, 2014-18

## Sales areas and densities

Figure 72: Leading grocery retailers: Total sales area, 2014-18

Figure 73: Leading grocery retailers: Annual sales per square metre, 2014-18

## Operating profits and margins

Figure 74: Leading grocery retailers: Operating profits, 2014-18

Figure 75: Leading grocery retailers: Operating margins, 2014-18

## Market Share

### Tesco increases its advantage over the other big four

Figure 76: Leading grocery retailers: Share of all grocery retail sales, 2018

### Market concentration drops in spite of acquisitions

Figure 77: Leading grocery retailers: Share of all grocery retail sales, 2014-19

### A note on our market share

## Online

### Online grocery usage is driven by existing customers

Figure 78: Use of online grocery services, December 2018

### Continued growth of online grocery hangs on addressing negative experiences

Figure 79: Estimated breakdown of sector sales, by channel, 2013-19

### Issues encountered with online grocery shopping

Figure 80: Issues experienced with online grocery orders in the past year, December 2018

### Why consumers choose not to shop online

Figure 81: Reasons for not shopping online for groceries, by previous experience of or interest in using online groceries services, December 2018

### Key players in the online grocery sector

Figure 82: Leading online grocery retailers' estimated market shares (excluding VAT), 2018

## Space Allocation Summary

### Summary data and classifications

Figure 83: Food, non-food standard classifications, 2019

### Hypermarkets convenience comparison overview

#### Hypermarkets broadening their product and services offering to give customers more reasons to visit

Figure 84: UK leading food retailers' hypermarket store format: Convenience comparison overview split, November 2019

Figure 85: McDonalds restaurant, Asda Supercentre, Watford, November 2019

#### Detailed hypermarket convenience comparison split

Figure 86: UK leading food retailers' hypermarket store format: Convenience comparison detailed split, November 2019

### Superstores convenience comparison overview

#### Bigger percentage share of in-store space allocated to convenience products

Figure 87: UK leading food retailers' superstore format: Convenience comparison overview split, November 2019

Figure 88: Wok Street, Sainsbury's Superstore, Finchley Road, London, November 2019

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Supermarkets - UK - Nov 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Detailed superstores convenience comparison split

Figure 89: UK leading food retailers' superstore format: Convenience comparison detailed split, November 2019

## Smaller supermarkets and discounters convenience comparison overview

### Food and drink products dominate

Figure 90: UK leading food retailers' smaller supermarkets and discounters: Convenience comparison overview split, November 2019

## Detailed smaller supermarkets and discounters comparison split

Figure 91: UK leading food retailers' smaller supermarkets and discounters: Convenience comparison detailed split, November 2019

## Food and drink categories split

Figure 92: UK leading food retailers: food and drink categories as a percentage of total space allocated to food and drink, November 2019

## Retail Product Mix

Figure 93: Leading food retailers, estimated sales mix, 2018/19

Figure 94: Leading food retailers: category sales as a % of total sales, 2018

Figure 95: Leading food retailers, sales density by broad category, per sqm, 2018

Figure 96: Leading food retailers: estimated share of key product markets, 2018

## Launch Activity and Innovation

### Supermarkets drive forward their sustainability agendas

Figure 97: M&S vertical farming initiative with Infarm, 2019

### Payment services that help save time

Figure 98: M& 'Mobile, Pay, Go' service at its store in Clapham Junction, 2019

### Experiencing the supermarket in different ways

Figure 99: Aldi Local store in Balham, 2019

### Developments in delivery

Figure 100: Waitrose Rapid Deliver service, 2019

### Promoting health and wellness

Figure 101: Sainsbury's 'Unlock the Hero in You' campaign, 2019

### Non-food innovations

### Sustainability efforts

### Extending the brand into non-food categories

## Advertising and Marketing Activity

### Total sector advertising down 7.7% year-on-year in 2018

Figure 102: Recorded above-the-line, online display and direct mail total advertising expenditure by UK supermarket and online grocers, 2015-19\*

### Tesco is the sector's biggest advertising spender

Figure 103: Recorded above-the-line, online display and direct mail total advertising expenditure, by leading UK supermarket and online grocers, 2015-18

### Advertising spend peaks around Christmas

Figure 104: Recorded above-the-line, online display and direct mail total advertising expenditure by UK supermarket and online grocers, by month, 2017 and 2018

### TV accounts for the biggest percentage share of advertising spend

Figure 105: Percentage media type split of recorded above-the-line, online display and direct mail total advertising expenditure by UK supermarkets and online grocers, 2015-19

### What we've seen so far in 2019

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Supermarkets - UK - Nov 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Tesco and Sainsbury's celebrating anniversaries  
 Asda and Lidl focusing on quality and range  
 Co-op community-focused campaign  
 Ocado's grocery delivery with no friction  
 Costcutter's biggest summer campaign to date  
 Nielsen Ad Intel coverage

### Brand Research

What we think

Brand map

Figure 106: Attitudes towards and usage of selected brands, October 2019

Key brand metrics

Figure 107: Key metrics for selected brands, October 2019

Brand attitudes: Tesco most trusted retailer

Figure 108: Attitudes, by brand, October 2019

Brand personality: Co-op perceived to be more fun

Figure 109: Brand personality – macro image, October 2019

Ocado, Waitrose and M&S are the most stylish

Figure 110: Brand personality – micro image, October 2019

Brand analysis

Tesco the most trusted brand

Sainsbury's leads on style and being ethical out of big four

Asda wins on accessibility over Sainsbury's

Morrisons joins Sainsbury's in third place for reliable retailer

Aldi is accessible to customers

Co-op continues to be the most ethical

Lidl is more basic than rival Aldi

M&S styles it out with great customer service

Iceland offers great value for money

Waitrose's perceived exclusivity wavers

Amazon's innovativeness and uniqueness remain high

Ocado is perceived as exclusive and comes highly recommended

### Aldi

What we think

Aldi to buy 'Leader Price' discounter from Casino

Increasing transparency with a focus on sustainability

Nord and Süd collaborate on own-brand sourcing

Meeting individual market needs

Aldi Nord evolving faster than ever

Company background

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Supermarkets - UK - Nov 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Company performance

Figure 111: Aldi: estimated group sales performance, 2014-18

Figure 112: Aldi: outlet data: 2014-18

### Retail offering

## Asda Group

### What we think

30-minute grocery delivery service

Preparing to launch new membership-free cash & carry operation

Mobile app scan-and-pay trial to speed up the shopping process

Helping shoppers spread the cost of shopping at a time of uncertainty

Expanded foodservice offering giving people more reasons to visit its stores

Commitment to plastic reduction

### Company background

### Company performance

Figure 113: Asda Group Ltd: Group financial performance, 2014-18

Figure 114: Asda Group Ltd: Outlet data, 2014-18

### Retail offering

## The Co-operative Group

### What we think

Expanding on-demand delivery grocery service

Ringling the changes in-store with the rollout of pay-in-aisle technology

NUS deal an opportunity to build brand loyalty with the next generation of grocery shoppers

Useful services proposition gives consumers more reasons to visit its stores

Expanded foodservice and food-to-go options

Reducing plastics and improving the recyclability of its packaging

### Company background

### Company performance

Figure 115: The Co-operative Food: Group financial performance, 2014/15-2018/19

Figure 116: The Co-operative Food: Outlet data, 2014/15-2018/19

### Retail offering

## Iceland Foods

### What we think

Accelerating retail park store format and continuing core high street refits

Exploring new channels to sell its food and expand customer base

Unique new own-label food offering to drive footfall

Enhanced online shopping service

Tackling the problem of plastic pollution

### Company background

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Supermarkets - UK - Nov 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Company performance

Figure 117: Iceland Foods Ltd: Group financial performance, 2014/15-2018/19

Figure 118: Iceland Foods Ltd: Outlet data, 2014/15-2018/19

### Retail offering

## J Sainsbury

### What we think

Sainsbury's six new strategic priorities

Sainsbury's and Asda merger blocked by CMA

Integration of the Argos business remains challenging

Digital update to Nectar loyalty scheme

Unmanned stores

Company background

### Company performance

Figure 119: J Sainsbury (UK): Group financial performance, 2014/15-2018/19

Figure 120: J Sainsbury (UK): Outlet data, 2014/15-2018/19

### Retail offering

## Marks & Spencer (UK Food)

### What we think

A full online food delivery service for the first time

Repurposing store estate will give more customers access to the full M&S Food range

Tapping into new food trends with innovative products

New value-for-money positioning to appeal to a wider audience

In-store farming for exceptional freshness

Upping the ante on its war on plastic

Incentivising customers to reduce food waste

Company background

### Company performance

Figure 121: Marks & Spencer (UK food): Group sales performance, 2014/15-2018/19

Figure 122: Marks & Spencer (UK Food): Food outlets, by format, 2014/15-2018/19

Figure 123: Marks & Spencer (UK food): Outlet data, 2014/15-2018/19

### Retail offering

## Ocado Group

### What we think

50/50 joint venture with M&S

Future earnings potential of proprietary software and robotic infrastructure solutions

On-demand grocery delivery service

Freshly harvested produce delivered within an hour

Improving the shopping experience

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Supermarkets - UK - Nov 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Company background

Company performance

Figure 124: Ocado Group plc: Group financial performance, 2013/14-2017/18

Figure 125: Ocado Group plc: Key performance metrics, 2014/15-2018/19

Retail offering

### Schwarz Group (Lidl)

What we think

Lidl pushing online growth in more markets

UK anticipates online launch

Kaufland seeking a road to recovery

Lidl opens smallest store

Adapting to shopper trends

Company background

Company performance

Figure 126: Schwarz Group: Group sales performance, 2014/15-2018/19

Figure 127: Schwarz Group: Outlet data, 2014/15-2018/19

Retail offering

### Spar International

What we think

Maximising foodservice opportunities

Positioned to capitalise on shopping locally and food provenance

Checkout-free shopping with scan, pay and go

Rollout of healthy food product ranges across European markets

Tackling food waste and saving consumers money at the same time

Company background

Company performance

Figure 128: Spar International: Selected Western Europe and Central & Eastern Europe retail sales, by country, 2014-18

Figure 129: Spar International: Selected Western Europe and Central & Eastern Europe stores, by country, 2014-18

Figure 130: Spar International: Selected Western Europe and Central & Eastern Europe retail sales area, 2014-18

Retail offering

### Tesco

What we think

Dave Lewis decides to leave the business

Tesco counter cost cuts expected to hit 9,000 jobs

Metro: simplifying store operations

New Clubcard subscription service

Booker acquires Best Food Logistics

Tesco continues to invest in Jack's

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Supermarkets - UK - Nov 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Increased investment in Asia

Expanding F&F clothing range and performance

Company background

Company performance

Figure 131: Tesco: Central Europe and Asia, like-for-like growth, Q1 2017/18-Q2 2019/20

Figure 132: Tesco Plc: Group financial performance, 2014/15-2018/19

Figure 133: Tesco plc, group outlet data, 2014/15-2018/19

Retail offering

### Waitrose & Partners

What we think

Radical management restructuring will bring Waitrose and John Lewis brands closer

Waitrose and John Lewis testing new joint loyalty scheme

End of Ocado supply deal a blow

Expanded order fulfilment options offering greater flexibility and convenience

Upskilling food counter staff

Unique at-home tasting experiences

Taking action on plastics and food waste

Company background

Company performance

Figure 134: Waitrose & Partners: Group financial performance, 2014/15-2018/19

Figure 135: Waitrose & Partners: Outlet data, 2014/15-2018/19

Retail offering

### WM Morrison Group

What we think

Breathing new life into its stores and loyalty scheme

Same-day online delivery

Capitalising on growth in convenience store sector through wholesale tie-ups

Expanded own online shop delivery options

Reducing plastic usage and minimising food waste

Company background

Company performance

Figure 136: Wm Morrison Group: Group financial performance, 2014/15-2018/19

Figure 137: Wm Morrison Group: Outlet data, 2014/15-2018/19

Retail offering

### Appendix – Data Sources, Abbreviations and Supporting Information

Data sources

Financial definitions

Consumer research methodology

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Supermarkets - UK - Nov 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

---

### Abbreviations

#### Detailed space allocation data

Figure 138: UK leading food retailers hypermarket store format: detailed space allocation, November 2019

Figure 139: UK leading food retailers superstore format: detailed space allocation, November 2019

Figure 140: UK leading food retailers smaller supermarkets and discounters: detailed space allocation, November 2019

---

### Appendix – Market Size and Forecast

#### Forecast methodology

---

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](https://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)