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State of Grocery Europe: Navigating the market headwinds

In 2021, the COVID-19 pandemic continued to influence the grocery retail market in Europe. Sales in the last three quarters of 2021 were lower than in the previous year but still significantly higher than in 2019, resulting from the partial closure of food services.

Going into 2022, grocery CEOs expected market conditions to deteriorate. Five key themes will likely shape European grocery retail in 2022 and beyond: 1) decreasing volumes and rising inflation; 2) widening polarization with higher price sensitivity and more focus on health, premium, and sustainability at the same time; 3) a slower online growth with more differentiated offers; 4) the search for new profit pools; and 5) a shift in the people model.

Disclaimer: The war in Ukraine is having a deep human, as well as social and economic, impact across countries and sectors. The exact implications for grocery retail are still unclear. This article was written before the war started. Our first analysis of the impact of the war indicates that it mostly accelerates the trends we have identified in this article—particularly that it might increase food and energy inflation even further and, as a result, make the increase in price sensitivity and downtrading more pronounced. We therefore believe the trends outlined in this article gained even more relevance through the current crisis.

by Christel Delberghe, Richard Herbert, Franck Laizet, Daniel Läubli, Jean-Albert Nyssens, Rickard Vallöf, and Tobias Wachinger



Looking back on 2021

The European grocery retail market in 2021 was shaped by the ongoing effects of the COVID-19 pandemic, the gradual reopening of the hospitality sector, the emergence of instant-delivery players (also called quick commerce), and price inflation.

Sales decreased in Europe by 0.6 percent in 2021 compared with the previous year, to a level that was still substantially higher than 2019. Volume decreased by 2.1 percent, but this development was partially offset by price inflation of 1.3 percent and slight uptrading of 0.2 percent. The results varied significantly across countries (see “Food and grocery market KPIs,” page 12). The first quarter

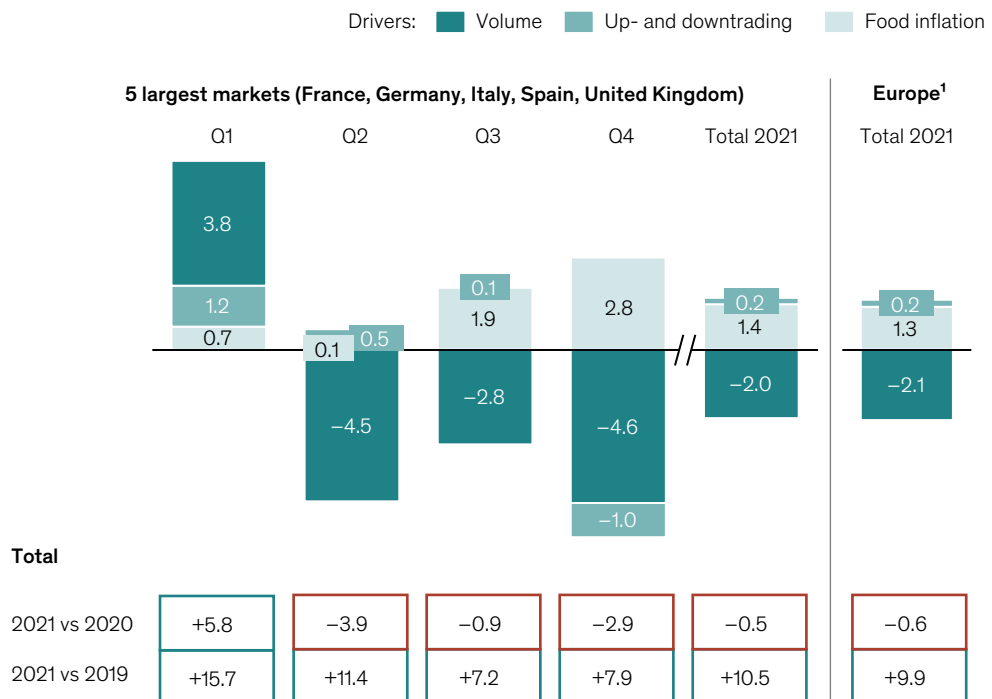
of 2021 was significantly higher than the prepandemic first quarter of 2020, reflecting the effects of market restrictions. From the second quarter of 2021 onward, hospitality activity began to resume and grocery retail sales stayed below the previous year, though they remained substantially above 2019 levels across quarters and countries (Exhibit 1).

From a format standpoint, online and discounters posted highest results in 2021, growing faster than the market in most countries. Supermarkets and hypermarkets saw a decline in sales as a result. Online revenues across Europe rose by 8.8 percent compared with 2020. Most of online’s growth occurred in the first quarter of 2021; in the

Exhibit 1

In 2021, price inflation and slight uptrading helped offset decreased volume in Europe.

Growth of grocery retail 2021 vs previous year, %



Note: Figures may not sum, because of rounding.

¹ Includes Czech Republic, France, Germany, Italy, Netherlands, Poland, Portugal, Spain, Sweden, and United Kingdom.

Source: Europanel (volume and up- and downtrading); Eurostat (inflation)

following quarters, online stayed at roughly the same level as in 2020. This growth was quite unequal across Europe: countries in Southern Europe (such as Italy and Portugal) and Central Europe (for example, Poland) saw a decrease in online. On the other end, Germany, the Netherlands, Sweden, and the United Kingdom recorded robust growth in 2021. Despite falling sales in offline formats and even higher declines in offline volume, retailers kept expanding their store networks, with available sales space expanding by 1.6 percent (see “Food and grocery market KPIs,” page 12). Especially for discounters, with store space 4 percent greater than that of 2020, this strategy was successful, resulting in growth and strong results reported by this format.

Within online, instant delivery had a year of substantial expansion, fueled by massive inflows of funding. The top 15 players in Europe had opened more than 800 dark stores by the end of 2021. Further, many traditional grocers formed partnerships with instant-delivery companies to extend their offerings beyond physical stores. Still, the instant market remains in its early days. It is small, lacks transparency, and is unprofitable in most cases. Our research suggests that the instant-delivery market in Europe reached between €3 billion and €6 billion in 2021, accounting for less than 1 percent of the total market but with three-digit percent growth annually.

Market outlook and key trends in 2022

Going into 2022, and before the invasion of Ukraine, grocery CEOs expect market conditions to deteriorate (Exhibit 2). In our State of Grocery CEO Survey, which included 57 European grocery CEOs, 60 percent of respondents said they believe market conditions this year will be worse than in 2021. Top reasons for their pessimism include the shrinking size of wallet for grocery retail as restaurants reopen in many parts of Europe, increased price sensitivity and competition (including from a maturing online market), and rising inflation. Wage increases, labor shortages, supply chain issues, and new regulations in some markets are other factors that affect the outlook of CEOs. The top opportunity cited by CEOs is e-commerce and omnichannel offerings, which remain a key priority for many of them.

Through our consumer research (Exhibit 3), CEO survey (Exhibit 4), and market analysis, we identified ten trends that we believe will shape the grocery landscape in 2022 and beyond. Some of the trends reinforce patterns we identified in last year’s report, while others are new and will likely prompt grocery executives to reassess and adapt their existing strategies.

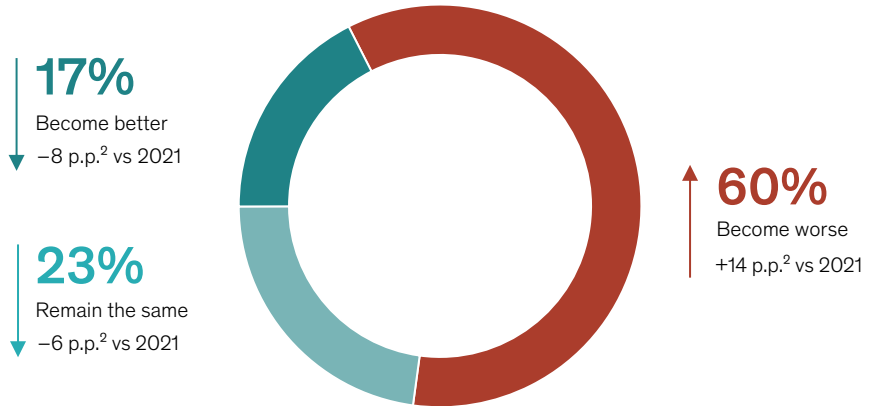
The top opportunity cited by grocery CEOs is e-commerce and omnichannel offerings, which remain a key priority for many of them.

European grocery CEOs have a generally negative outlook on market conditions for 2022.

European CEO survey results, n = 57

Survey date: December 2021–January 2022, before the crisis in Ukraine

Sentiment toward 2022 grocery market conditions¹



Words describing the grocery industry in 2022³



¹ Q: How will market conditions for the grocery retail industry evolve in 2022, in your view?

² Percentage points.

³ Q: Please choose the top 3 adjectives you would use to describe the grocery retail industry in 2022.

Source: CEO Survey 2021, January 2021, n = 48; CEO Survey 2022, November 2021–January 2022, n = 57

While price is a top priority for consumers across Europe, country differences are more pronounced for health and online.

2022 vs 2021 survey

Survey date: December 2021—January 2022, before the crisis in Ukraine

Net intent¹ of consumers toward grocery shopping in 2022 compared with 2021²



	Northern and Western Europe						Southern Europe		Central Europe	
	Europe average ⁴	Germany	United Kingdom	Netherlands	France	Sweden	Switzerland	Spain	Italy	Poland
More consumers prioritize price										
Look for ways to save money when shopping	42% +9	41% +14	41% +3	38% +11	43% +10	36% +10	39% +5	48% +4	42% +3	45% +10
Actively research for best promotions	28% +1	12% -11	21% -1	27% +7	33% +6	27% +8	15% -8	40% +6	38% -2	39% +7
Switch to less expensive products to save money	18% +1	18% +7	19% -5	24% +10	18% +7	13% +4	16% -4	22% -8	8% -9	20% +5
Buy private-label products instead of known brands	14% +4	18% +6	13% +6	27% +14	11% +5	11% +7	14% +3	16% -2	8% -4	5% -3
Healthy and sustainable products remain a top priority										
Focus on healthy eating and nutrition	34% +2	29% -8	28% -2	37% +7	38% +7	28% +1	30% +1	42% +7	40% +8	31% -4
Pay a higher price to get a healthier product	6% n/a	1% n/a	-5% n/a	-3% n/a	13% n/a	6% n/a	7% n/a	10% n/a	13% n/a	13% n/a
Pay a higher price to get an environmentally friendlier product	2% n/a	-3% n/a	-5% n/a	-9% n/a	8% n/a	4% n/a	6% n/a	6% n/a	3% n/a	9% n/a
High-income consumers' willingness to pay	15% n/a	14% n/a	11% n/a	16% n/a	21% n/a	16% n/a	16% n/a	10% n/a	16% n/a	16% n/a
Mixed outlook for online growth⁵										
Buy groceries online	-1% -11	-9% -14	5% -11	4% -5	2% -10	2% -9	-7% -16	-1% -14	0% -8	-7% -17

¹ Share of consumers who want to do more of activity minus share of consumers who want to do less of activity in 2022 vs 2021.

² Q: Think about 2022. Are you planning to do more, less or about the same of the following?

³ Percentage points.

⁴ Including all countries shown in this chart; unweighted average.

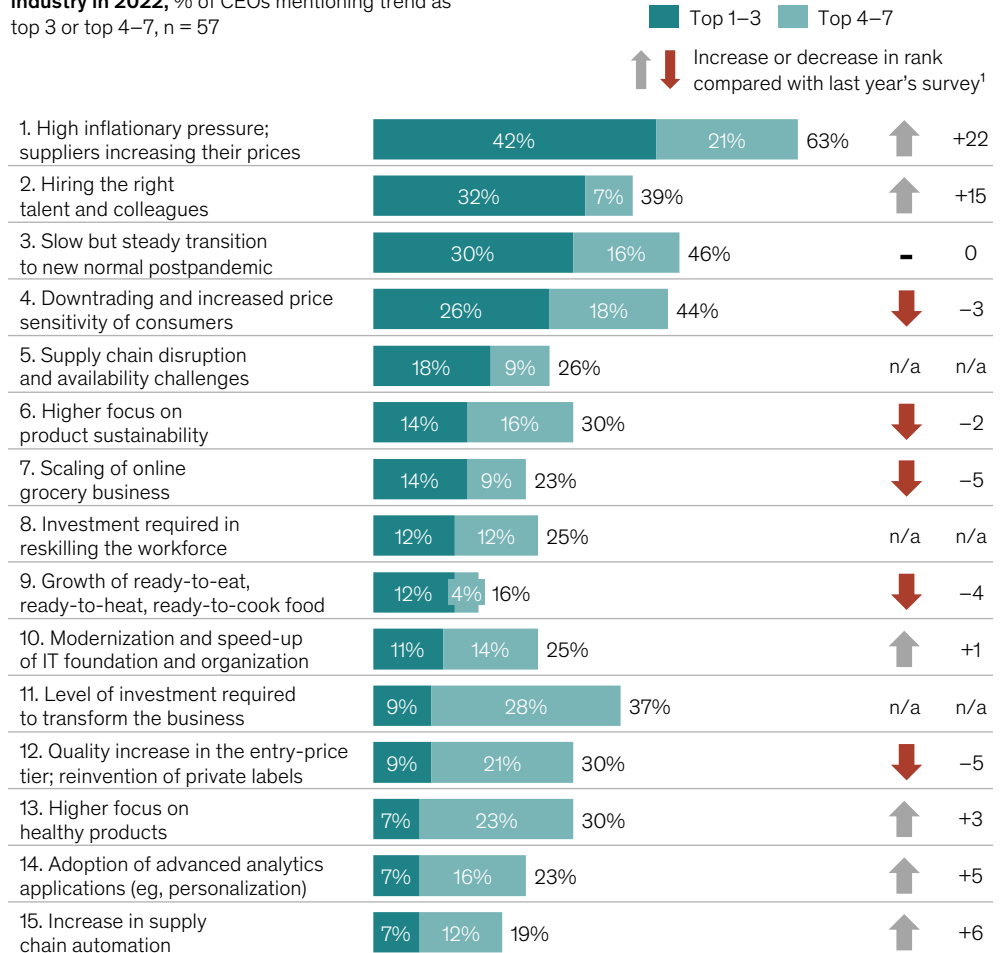
⁵ Excluding negative intent of consumers not regularly buying online (ie, less than once a month).

Source: Consumer Survey, November 6–13, 2020, n = 11,573, including the following markets: France, Germany, Italy, Netherlands, Poland, Spain, Sweden, Switzerland, and United Kingdom (sample to match general population ages 18 and up)

European CEOs expect inflation, talent, transition to a new normal, and downtrading to be the predominant trends in 2022.

Top 15 trends mentioned by CEOs for the grocery industry in 2022, % of CEOs mentioning trend as top 3 or top 4–7, n = 57

Survey date: December 2021–January 2022, before the crisis in Ukraine



Note: Figures may not sum, because of rounding.

¹ Survey in 2021: We asked CEOs to rank the top 7 trends they think will shape the grocery industry in the next 1–3 years on 22 dimensions. Source: CEO Survey 2021, January 2021, n = 48; CEO Survey 2022, November 2021–January 2022, n = 57

1. Economic headwinds put pressure on retailer margins

Several factors could shrink the margins of grocery retailers. Overall inflation in the European Union reached 5.6 percent in January 2022, while food prices rose 3.5 percent. These changes will likely be accelerated by the invasion of Ukraine.

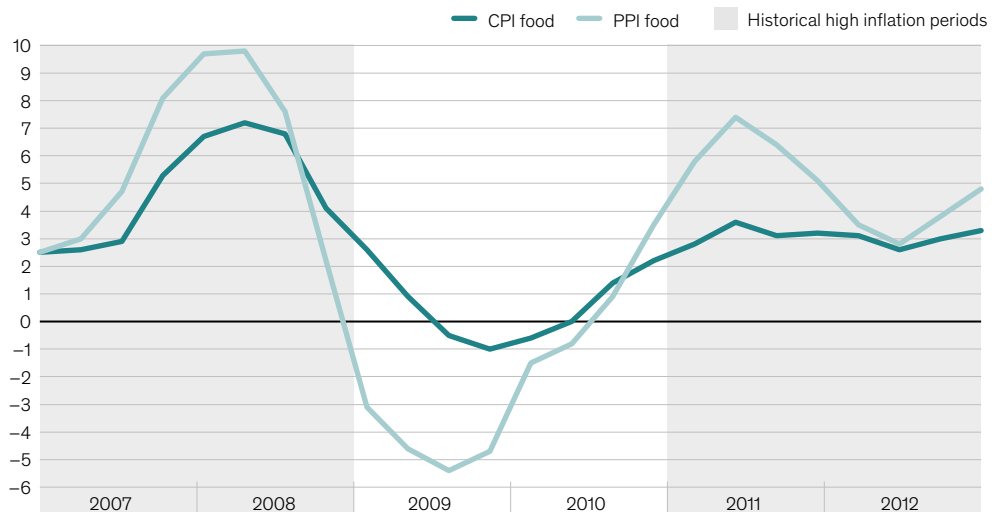
For grocery retailers, inflation has two primary effects: costs increase and consumers' disposable income shrinks.

From 2007 to 2008, food price inflation had little effect on grocery's profitability, because retailers were able to partly pass along rising prices from suppliers to consumers. By contrast, inflation during 2011 and 2012 led to a small reduction in margins (Exhibit 5). This time, heightened price sensitivity among low-income consumers, combined with decreasing overall volumes and competitive markets, might make it more difficult for retailers to pass on price increases. To avoid further losses in volume, some retailers might opt to delay part of the price increases, resulting in lower margins, at least temporarily.

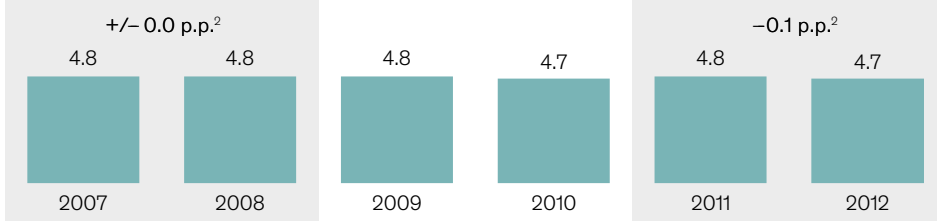
Exhibit 5

Performance of listed EU grocers during historical high inflation periods has been stable.

Quarterly growth rates year over year for consumer price index (CPI), producer price index (PPI),¹ %



Average EBIT margins over the year for selected players, %



Note: Analysis based on publicly listed players for which entire data series was available: Ahold Delhaize, Casino, Carrefour, Colruyt, Jerónimo Martins, Sainsbury's, and Tesco.

¹ CPI and PPI for the EU-27.

² Percentage points.

Source: Capital IQ; Eurostat

Higher inflation also affects consumers. It reduces their available income, as adjustments to wages tend to trail inflation, leaving them with less money for groceries. If inflation stays high, consumers will likely continue downtrading to cheaper products and to actively search for promotions; we saw some of the first effects of this in the fourth quarter of 2021. Discounters and players with competitive entry-level private-label offerings are best positioned to serve these changed consumer needs.

2. Widening polarization with higher price sensitivity and more health, premium, and sustainability at the same time

Our research indicates consumer preferences in 2022 will become even more differentiated—by income, age, and household size. On the one hand, the growth of healthy, premium, and sustainable products is likely to accelerate even more. These attributes will be fueled primarily by high-income consumers, younger generations (particularly Gen Z), and larger households (those with more than three people). For example, in 2022 high-income households are much more likely to increase their focus on healthy, premium, and environmentally friendly goods (Exhibit 6).

On the other hand, the share of consumers who plan to save more money on food and trade down to cheaper products also has risen substantially compared with 2021. Lower-income consumers are the driving force behind this increase.

Grocers could consider trimming the middle of their assortments and further strengthening their entry-price offerings and premium assortment. Adjusting the assortment to the specific needs of a store's catchment area will become even more important.

3. Slower online growth with more differentiated offers

Our consumer research suggests online growth might take a yearlong pause in 2022 in many markets. This pattern could be especially evident in markets that have less-developed online offerings, where consumers might even reduce their spending online. In markets with mature online offerings, consumers declare they will further increase their spending, albeit at a slower pace.

In the midterm, we expect the growth to continue, with e-grocery reaching above 20 percent of share in 2030 depending on the country and scenario (see “The next S-curve of growth: Online grocery to 2030” on page 30).

To create this growth, it is important that online offers become more differentiated and tailored to the needs of additional consumer groups and shopping missions. We already see the first signs, that the online market in the future might consist of several, well-differentiated segments.

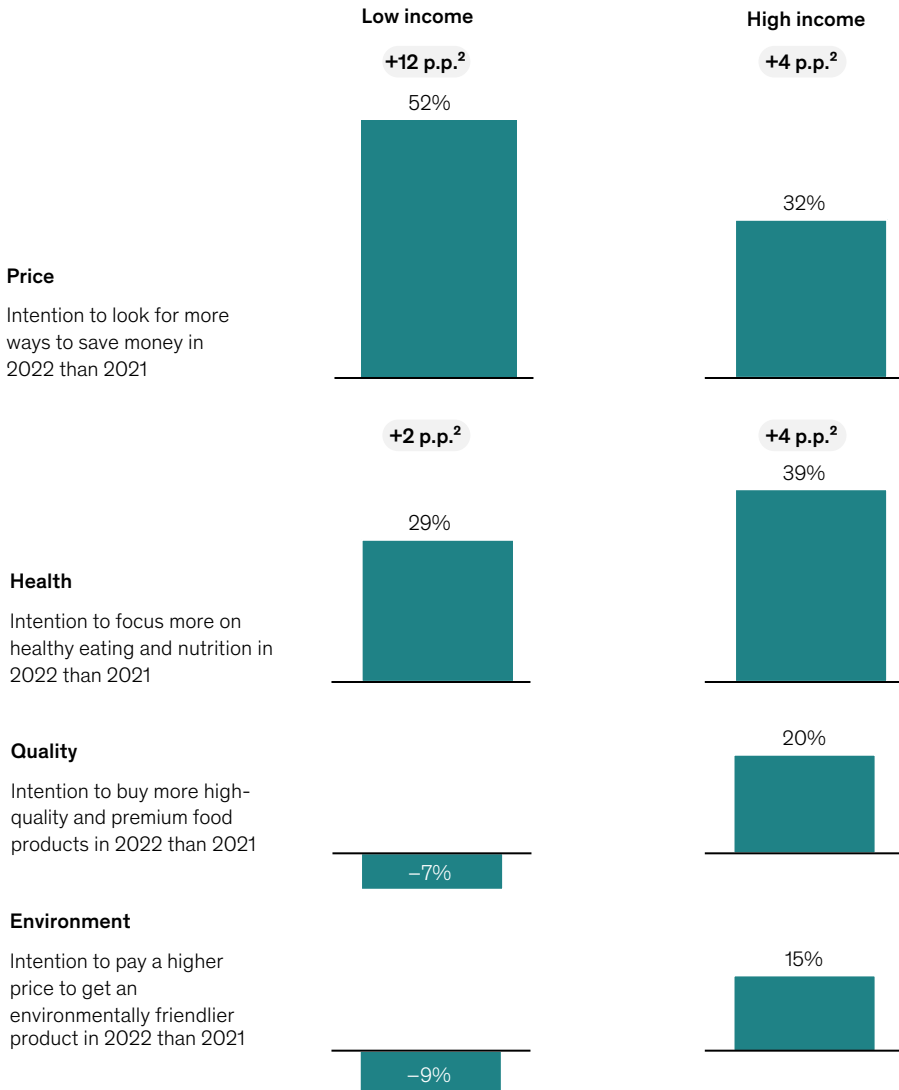
The most prominent new online market segment is instant delivery. It offers the fastest and most convenient delivery of a reduced assortment at a higher price per item, similarly to what convenience formats offer in the offline channel. Other players differentiate themselves through larger assortments (for example, Ocado), local or organic offerings (for example, Farmy in Switzerland and Rohlik), or a lean value proposition (for example, Picnic).

Thanks to these more differentiated online offerings, we see consumers starting to split their online purchases across different online shops. About one-third of frequent online shoppers (that is, those who shop online at least once a week) regularly order from three or more e-grocers. The more often consumers shop online, the more online grocers they use. There is therefore a good chance that as the online market matures, several different online formats and value propositions will coexist and compete for consumer baskets.

There is increasing polarization between low- and high-income consumers regarding attitudes toward price, health, quality, and environment.

Net intent¹ of consumers toward grocery shopping in 2022 compared with 2021, European average, %

2022 Change from previous year



¹ Share of consumers who want to do more of activity minus share of consumers who want to do less of activity in 2022 vs 2021; thus, negative numbers imply that consumers want to reduce their grocery shopping in these categories.

² Percentage points.

Source: Consumer Survey, November 6–13, 2020, n = 11,573, including the following markets: France, Germany, Italy, Netherlands, Poland, Spain, Sweden, Switzerland, and United Kingdom (sample to match general population ages 18 and up)



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4. The search for new profit pools

With their core business under pressure, many retailers are looking for new profit pools—either within their core business, through advanced analytics and artificial intelligence, or outside of their core, by entering new revenue streams.

Leading retailers increasingly master advanced analytics to inform their business decisions, especially around assortment, price, and promotions. Plenty of untapped potential remains in this area. Recent breakthroughs in the field of personalized offers and localized, store-specific assortment could bring a new wave of value that can be captured to improve sales and profitability.

Many retailers are tapping into new revenue streams beyond their core. For example, some are investing more in health offerings and solutions. Another new profit pool with high potential might be retail media networks. Several US players have built dedicated units to sell advertising space to media agencies and brands. These networks use loyalty card data to target the advertising by customer segment and are therefore attractive to consumer brands. Leading US players achieve up to 8 percent of their online sales through retail media networks, with margins of more than 50 percent. Some European grocers, such as Ocado and Tesco, are also embarking on this journey.

5. A shift in the people model

Talent has become a bottleneck for many retailers: 39 percent of grocery CEOs see attracting the right talent as one of their key challenges. In addition to high employee attrition in grocery retail, demand for different skills—such as social-emotional skills and advanced analytical and technical skills—went up. To win in this future landscape, attracting and retaining the right talent while ensuring availability of key skills becomes critical. In the postpandemic labor market, competition for talent is increasing as unemployment levels fall.

To compete, retailers may want to adjust their people models to strategically plan and manage for the required skills for the next three to five years, ensure workforce retention, and offer a robust reskilling program.

Implications for grocers

The market environment in the next 12 to 18 months might be difficult. To overcome the diverse array of challenges while meeting consumer needs, retailers must be prepared to take bold actions and keep investing in key areas such as online, new profit pools, analytics, sustainability, and people.

While the underlying recipe for these actions is not completely new, its complexity increases

The market environment in the next 12 to 18 months might be difficult.

with divergent demands from low- and high-income consumers and more differentiated offerings in the online market. It will therefore be vital for retailers to strengthen their distinct offerings tailored to these different needs—for example, through rebalancing the price tiers, building up private labels, making assortment and prices more store-specific, and personalizing promotions.

Retailers will also likely benefit from exploring new revenue sources (such as retail media networks) by monetizing their traffic and data.

In the short term, the impact of the invasion of Ukraine as well as inflation and energy costs are top of mind for CEOs, putting even stronger pressure on prices and operational efficiency, along with the wellbeing of employees.

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Food and grocery market KPIs in 2021 grew on average.

Year-over-year (YoY) growth in 2021 vs 2019 and 2020, %

		Northern and Western Europe					Southern Europe			Central Europe		Weighted average ¹
		Germany	United Kingdom	Netherlands	France	Sweden	Spain	Italy	Portugal	Czech Republic	Poland	
Food market—segment growth												
Grocery retail² <i>YoY change</i>	vs 2020	+0.9	-1.0	+1.6	-2.2	+0.4	-7.4	+2.3	-0.1	-1.0	+3.2	-0.6
	vs 2019	+13.6	+12.0	+11.4	+5.3	+16.3	+5.4	+8.4	+13.2	+7.3	+10.1	+9.9
Modern grocery retail³ <i>YoY change</i>	vs 2020	+1.5	-1.1	+1.3	-2.3	+0.6	-7.1	+4.4	-0.2	+1.6	+5.5	-0.1
	vs 2019	+14.6	+12.5	+10.5	+5.7	+16.5	+6.7	+13.6	+13.1	+10.5	+17.0	+11.4
Other grocery formats⁴ <i>YoY change</i>	vs 2020	-1.6	-0.4	+3.4	-1.2	-4.5	-8.2	-5.3	+0.6	-8.5	-1.4	-2.3
	vs 2019	+9.5	+9.0	+16.3	+2.2	+10.3	+1.8	-8.5	+13.6	-1.8	-1.9	+4.6
Foodservice⁵ <i>2019 vs 2020, 2020 vs 2021 YTD⁶</i>	vs 2020	-7.7	+32.1	-1.3	+10.5	+4.8	+25.9	+7.6	+10.9	+9.4	+17.2	+11.0
	vs 2019	-36.7	-19.1	-32.2	-25.1	-19.6	-28.1	-33.7	-26.8	-26.1	-1.6	-26.7
Modern retail—revenue growth per format												
Total² <i>YoY change</i>	vs 2020	+1.5	-1.1	+1.3	-2.3	+0.6	-7.1	+4.4	-0.2	+1.6	+5.5	-0.1
	vs 2019	+14.6	+12.5	+10.5	+5.7	+16.5	+6.7	+13.6	+13.1	+10.5	+17.0	+11.4
Hypermarkets⁷ <i>YoY change</i>	vs 2020	-1.5	-5.8	N/A	-1.8	+0.8	-10.0	+3.2	N/A	+0.2	-1.6	-2.6
	vs 2019	+8.1	-1.6	N/A	+1.0	+10.7	+1.9	-3.0	N/A	+4.1	+1.2	+2.4
Supermarkets⁸ <i>YoY change</i>	vs 2020	+4.2	-3.9	-0.9	-4.5	-4.4	-7.4	+4.3	-0.1	-0.6	-2.5	-1.2
	vs 2019	+21.4	+5.4	+6.2	+5.3	+7.0	+4.0	+12.6	+10.9	+9.9	+8.2	+10.2
Discounters⁹ <i>YoY change</i>	vs 2020	-1.0	+1.5	-0.9	-4.1	+5.6	-5.2	+6.4	+1.1	+2.6	+12.2	+0.3
	vs 2019	+7.8	+15.0	+2.6	+3.1	+22.9	+12.8	+23.5	+17.3	+15.5	+25.5	+12.0
Online <i>YoY change</i>	vs 2020	+14.5	+14.9	+28.6	+3.7	+14.1	+3.3	-1.0	-8.7	+18.8	-3.3	+8.8
	vs 2019	+64.5	+91.5	+100.4	+47.1	+129.5	+69.8	+54.9	+44.9	+43.1	+50.2	+67.3
Modern retail—space growth per format												
Total <i>YoY change</i>	vs 2020	+1.0	+0.8	+2.0	+0.9	+2.6	+2.2	+4.6	+2.5	+1.9	0.0	+1.6
	vs 2019	+1.8	+1.7	+3.9	+1.6	+5.8	+0.7	+10.0	+8.4	+3.1	+3.3	+3.0
Hypermarkets¹⁰ <i>YoY change</i>	vs 2020	+0.3	+0.3	N/A	-0.3	+0.5	+1.7	+9.3	N/A	+0.5	-11.1	+0.8
	vs 2019	+1.6	-0.8	N/A	+1.3	+2.5	+0.3	+9.7	N/A	+0.2	-12.7	+1.1
Supermarkets¹¹ <i>YoY change</i>	vs 2020	+0.7	-0.2	+1.4	0.0	+3.4	+2.8	+1.8	+1.1	+1.7	-1.9	+0.7
	vs 2019	-1.1	+0.1	+2.7	-0.9	+8.8	+0.2	+6.6	+9.5	+4.0	-0.2	+0.9
Discounters¹² <i>YoY change</i>	vs 2020	+1.6	+6.5	+3.5	+2.5	+5.9	+1.8	+6.6	+8.0	+6.6	+5.8	+4.0
	vs 2019	+3.7	+13.9	+8.2	+5.9	+9.3	+2.8	+13.6	+13.9	+10.4	+11.2	+8.1
Convenience¹³ <i>YoY change</i>	vs 2020	+3.1	+0.8	+24.4	+4.8	+2.9	+3.8	+1.4	+0.7	+0.1	+4.1	+3.8
	vs 2019	+6.5	+1.4	+27.4	+2.9	+2.9	-4.6	+16.5	+2.4	+0.5	+12.0	+5.8
Modern retail—growth of sales per square meter												
Sales/m² <i>YoY change</i>	vs 2020	+0.4	-1.9	-0.7	-3.2	-2.0	-9.1	-0.3	-2.7	-0.3	+5.6	-1.7
	vs 2019	+12.6	+10.7	+6.4	+4.0	+10.2	+5.9	+3.3	+4.4	+7.2	+13.3	+8.3

		Northern and Western Europe					Southern Europe			Central Europe		Weighted average ¹
		Germany	United Kingdom	Netherlands	France	Sweden	Spain	Italy	Portugal	Czech Republic	Poland	
Grocery retail—price and volume growth												
Volume <i>YoY change</i>	vs 2020	-2.2	-1.6	-0.7	-3.2	+0.4	-8.3	+1.3	-0.6	-1.6	+0.4	-2.1
	vs 2019	+4.3	+8.4	+3.8	+4.4	+14.6	+2.1	+8.0	+11.4	+2.7	+3.0	+5.7
Basket size volume <i>YoY change</i>	vs 2020	+3.3	-2.2	+3.5	-3.9	+3.7	-7.5	-6.5	-2.8	+4.8	+1.1	-1.6
	vs 2019	+9.0	+23.6	+12.2	+8.7	+16.9	+5.8	+4.4	+9.4	+15.2	+20.2	+12.0
Frequency <i>YoY change</i>	vs 2020	-5.3	+0.6	-4.1	+0.7	-3.2	-0.9	+8.4	+2.3	-6.1	-0.7	-0.4
	vs 2019	-4.4	-12.3	-7.6	-3.9	-2.0	-3.6	+3.4	+1.9	-10.8	-14.3	-5.3
Price changes (inflation) <i>YoY change</i>	vs 2020	+3.1	+0.3	-0.2	+0.6	+0.5	+1.9	+0.5	+0.7	+0.9	+3.0	+1.3
	vs 2019	+5.4	+1.0	+1.7	+2.7	+2.6	+4.3	+2.0	+2.8	+5.6	+7.6	+3.3
Up/down trading changes	vs 2020	0.0	+0.3	+2.5	+0.4	-0.5	-0.8	+0.5	-0.2	-0.2	-0.2	+0.2
	vs 2019	+3.6	+2.5	+5.7	-2.0	-1.2	-0.9	-1.8	-1.3	-1.1	-0.7	+0.7
Other key grocery indicators												
Online-channel market share <i>2021</i>		4.2	13.0	8.1	8.8	7.5	2.9	3.0	3.2	3.6	1.5	6.6
Private-label share¹⁴ <i>2021</i>		30.5	49.5	41.4	34.2	23.6	27.0	34.4	38.3	25.7	20.3	34.7
Private-label share¹⁴ <i>p.p.¹⁵ share change</i>	vs 2020	-0.2	+0.1	-0.6	-1.0	0.0	+1.2	+6.4	+0.8	+1.3	+1.0	+0.7
	vs 2019	-0.8	-0.5	-1.1	-0.5	+1.4	+1.5	+7.5	+2.3	+3.0	+1.9	+0.9
Promo share <i>2021</i>		18.8	29.8	21.9	15.6	35.9	13.3	34.7	25.1	52.4	26.9	23.4
Promo share <i>p.p.¹⁵ share change</i>	vs 2020	+1.0	-1.2	-0.1	+1.9	+9.0	+0.1	+0.3	+0.6	+1.3	+2.8	+0.9
	vs 2019	+0.6	-3.8	+0.1	+0.7	+8.0	-0.4	-4.3	-0.4	+0.3	+2.6	-0.6
Consumer indicators												
Consumer confidence <i>p.p.¹⁶ change</i>	vs 2020	+4.1	+9.8	+9.3	+5.9	+7.6	+10.0	+9.1	+7.2	-0.9	+4.5	+7.0
	vs 2019	-3.2	-1.8	+3.4	+1.2	+8.4	-6.4	+5.6	-8.6	-11.5	-11.9	-1.4
Eco-active consumers¹⁶ <i>2021</i>		47	29	21	24	N/A	22	26	N/A	14	25	
Eco-active consumers¹⁶ <i>p.p.¹⁶ share change</i>	vs 2020	+9.0	+6.0	N/A	+5.0	N/A	-2.0	+3.0	N/A	-4.0	+3.0	
	vs 2019	+17.0	+7.0	+6.0	+11.0	N/A	+8.0	N/A	N/A	-2.0	+6.0	

¹ Weighted according to 2020 total grocery revenues for each country.

² Europanel revenue data measures only value of purchases that are taken home (ie, excludes value of purchases that are consumed on the go, at work, etc).

³ Consists of hypermarkets, supermarkets, online stores, and discounters.

⁴ Remaining store types not covered by "modern retail." Examples include small corner store, pharmacy, drugstore, and open market.

⁵ Includes food and beverage service activities providing complete meals or drinks fit for immediate consumption (eg,

traditional restaurants, self-service, or takeaway restaurants).

⁶ Year to date. For the Czech Republic and the United Kingdom, a full year. For France, Germany, Portugal, and Spain, up to November. For Italy, the Netherlands, Poland, and Sweden, up to September.

⁷ Large retail outlets under common ownership with sales area >2,500m² (according to Europanel).

⁸ Smaller retail outlets under common ownership, excluding discounters. Sales area from 450m² to 2,500m² (according to Europanel).

⁹ Limited-range discount retailers such as Aldi, Lidl, Biedronka, Norma, Netto Marken-Discount, Eurospin, Penny, Dia, and Leader Price (according to Europanel).

¹⁰ Sales area between 3,000m² to 6,000m²; substantial nongrocery store offering (according to IGD).

¹¹ Sales area ranging from 300m² to 6,000m²; store offering is predominantly food (according to IGD).

¹² Sales area from 300m² to 1,500m² (potentially up to 6,000m²); narrow range (<4,000 SKUs) with a focus on everyday low prices. Offerings typically

dominated by private label, and stores operate with low-cost business model (according to IGD).

¹³ Stores typically under 300m², with convenience-focused ranges usually up to 6,000 SKUs and long opening hours (according to IGD).

¹⁴ Methodology focused on value (not volume) of what customers purchase across formats (according to Europanel).

¹⁵ Percentage points.

¹⁶ Consumers that take the most actions to reduce their environmental impact, such as using their own bags, bottles, and cups and avoiding plastic.

Source: Europanel; Eurostat; GfK; IGD Research; Office for National Statistics