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		
		Germany	United Kingdom	Netherlands	France	Sweden	Spain	Italy	Portugal	Czech Republic	Poland	Weighted average[1]
Food market—segment growth												
Grocery retail[2] *YoY change*	*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 retail[3] *YoY change*	*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 formats[4] *YoY change*	*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**
Foodservice[5] *2019 vs 2020, 2020 vs 2021 YTD*[6]	*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												
Total[2] *YoY change*	*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**
Hypermarkets[7] *YoY change*	*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**
Supermarkets[8] *YoY change*	*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**
Discounters[9] *YoY change*	*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 *YoY change*	*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 *YoY change*	*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**
Hypermarkets[10] *YoY change*	*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**
Supermarkets[11] *YoY change*	*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**
Discounters[12] *YoY change*	*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**
Convenience[13] *YoY change*	*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 *YoY change*	*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**

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		Northern and Western Europe					Southern Europe			Central Europe		
		Germany	United Kingdom	Netherlands	France	Sweden	Spain	Italy	Portugal	Czech Republic	Poland	Weighted average[1]
Grocery retail—price and volume growth												
Volume *YoY change*	*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 *YoY change*	*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 *YoY change*	*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) *YoY change*	*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 *2021*		4.2	13.0	8.1	8.8	7.5	2.9	3.0	3.2	3.6	1.5	**6.6**
Private-label share[14] *2021*		30.5	49.5	41.4	34.2	23.6	27.0	34.4	38.3	25.7	20.3	**34.7**
Private-label share[14] *p.p.[15] share change*	*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 *2021*		18.8	29.8	21.9	15.6	35.9	13.3	34.7	25.1	52.4	26.9	**23.4**
Promo share *p.p.[15] share change*	*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 *p.p.[15] change*	*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 consumers[16] *2021*		47	29	21	24	N/A	22	26	N/A	14	25	
Eco-active consumers[16] *p.p.[15] share change*	*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 >2,500m^2 (according to Europanel).
[8] Smaller retail outlets under common ownership, excluding discounters. Sales area from 450m^2 to 2,500m^2 (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 3,000m^2 to 6,000m^2; substantial nongrocery store offering (according to IGD).
[11] Sales area ranging from 300m^2 to 6,000m^2; store offering is predominantly food (according to IGD).
[12] Sales area from 300m^2 to 1,500m^2 (potentially up to 6,000m^2); 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 300m^2, 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