Food and grocery market KPIs in 2022

Year-over-year (YoY) growth in 2022 vs 2021 and 2019, %

		Northern and Western Europe						Southern Europe			Central Europe		
		Germany	United Kingdom	Nether-lands	France	Belgium	Sweden	Spain	Italy	Portugal	Czech Republic	Poland	Weighted average[1]
Food market – segment growth													
Grocery retail value[2] € billion		181	143	36	176	29	23	83	102	13	17	46	
Grocery retail value growth[2] percent change	vs 2021	+0.9	+0.9	+4.6	+3.3	+1.8	+3.2	+2.2	+4.6	+1.4	+6.9	+11.4	**+2.9**
	vs 2019	+ 14.6	+12.9	+16.5	+8.9	+12.8	+20.0	+10.5	+13.5	+14.8	+14.8	+22.7	**+13.4**
– Modern grocery retail value growth[3] percent change	vs 2021	+3.4	+1.2	+4.5	+3.4	+1.4	+3.5	+4.1	+6.2	+2.2	+8.0	+13.9	**+4.1**
	vs 2019	+17.9	+13.9	+15.5	+10.0	+12.5	+20.5	+13.6	+20.9	+15.8	+19.4	+33.2	**+16.1**
– Other grocery formats value growth[4] percent change	vs 2021	–9.1	–1.0	+5.3	+2.6	+3.0	–2.0	–3.5	–1.2	–3.6	+3.3	+6.3	**–1.5**
	vs 2019	+1.6	+7.9	+22.6	+3.0	+13.9	+8.1	+1.4	–8.2	+8.7	+1.4	+4.3	**+3.8**
Grocery retail deflated value growth[5] percent change	vs 2021	–10.3	–9.1	–5.5	–3.7	–6.6	–7.5	–8.4	–4.3	–10.2	–8.7	–2.7	**–7.0**
	vs 2019	–3.4	+0.8	+3.5	–1.1	+1.3	+4.8	–5.0	+1.8	–1.2	–7.0	–0.4	**–0.8**
Foodservice value growth[6] percent change	vs 2021	+49.6	+ 33.3	+50.7	+46.5	+43.0	+26.3	+33.0	+42.6	+39.4	+47.1	+32.3	**+41.8**
	vs 2019	+0.3	+10.7	+15.2	+16.1	+20.5	+14.0	–3.0	+6.2	+1.4	+12.3	+36.5	**+10.0**
Modern retail – revenue breakdown													
Total[2] percent change	vs 2021	+3.4	+1.2	+4.5	+ 3.4	+1.4	+3.5	+4.1	+ 6.2	+2.2	+8.0	+13.9	**+4.1**
	vs 2019	+17.9	+13.9	+15.5	+10.0	+12.5	+20.5	+13.6	+20.9	+15.8	+19.4	+33.2	**+16.1**
– Hypermarkets[7] percent change	vs 2021	–1.2	–0.1	N/A	+ 3.6	–1.0	+1.8	+5.3	+1.2	N/A	+ 6.9	+5.9	**+1.7**
	vs 2019	+6.8	–1.7	N/A	+3.9	+1.6	+12.7	+9.6	–1.7	N/A	+11.4	+7.2	**+4.1**
– Supermarkets[8] percent change	vs 2021	0.0	+0.6	+3.6	+3.0	+1.1	+3.0	+3.8	+5.2	+1.1	+4.5	+ 11.4	**+2.7**
	vs 2019	+21.4	+6.0	+10.1	+8.2	+9.6	+10.2	+12.3	+19.2	+12.4	+14.8	+20.5	**+13.5**
– Online[9] percent change	vs 2021	+6.7	–9.2	+3.3	+2.2	–2.7	–14.6	–8.4	+4.6	–20.8	+12.8	+41.1	**+1.8**
	vs 2019	+63.1	+73.9	+107.2	+53.9	+113.9	+95.8	+59.5	+62.3	+14.8	+61.5	+111.9	**+70.4**
– Discounters[10] percent change	vs 2021	+7.6	+16.3	+9.3	+5.3	+2.6	+ 12.4	+ 7.0	+ 12.7	+11.0	+11.1	+ 16.0	**+9.8**
	vs 2019	+16.0	+33.8	+12.3	+11.0	+10.7	+38.1	+16.7	+37.6	+30.3	+28.4	+45.6	**+22.6**
Modern retail – space breakdown													
Total percent change	vs 2021	+0.4	+0.6	+1.8	+1.1	+1.4	+1.3	–0.1	+2.4	+3.2	+2.0	+5.7	**+1.2**
	vs 2019	+2.7	+1.6	+5.2	+3.0	+3.4	+3.5	+1.8	+3.0	+12.4	+4.8	+11.1	**+3.3**
– Hypermarkets[11] percent change	vs 2021	+0.3	–0.3	N/A	–2.2	–0.3	+0.8	–4.8	–0.3	0.0	+0.6	+0.7	**–0.9**
	vs 2019	+3.9	+0.4	N/A	–0.8	–0.3	+2.4	–0.8	–3.4	+2.6	+1.2	–11.9	**–0.2**
– Supermarkets[12] percent change	vs 2021	–0.6	–0.1	+1.4	+2.3	+1.2	+0.2	+2.2	+2.5	+2.9	+3.2	+4.5	**+1.3**
	vs 2019	–0.7	–0.6	+3.6	+1.1	+2.1	+2.9	+1.2	+1.1	+13.1	+7.6	+2.3	**+1.0**
– Discounters[13] percent change	vs 2021	+1.1	+3.7	+3.1	+4.1	+1.7	+6.6	+1.0	+ 6.2	+7.5	+5.1	+8.6	**+3.6**
	vs 2019	+4.4	+14.6	+10.7	+9.1	+5.1	+11.7	+2.8	+9.8	+23.8	+14.1	+28.0	**+9.7**
– Convenience[14] percent change	vs 2021	+1.3	+1.2	+8.8	+2.9	+2.0	–0.2	+1.6	–3.7	+0.8	+0.1	+7.0	**+1.6**
	vs 2019	+3.1	+1.9	+25.3	+9.4	+5.2	–1.0	+7.7	+9.2	+7.3	–1.6	+23.5	**+7.2**
Sales/m² percent change	vs 2021	+ 3.0	+0.7	+2.6	+2.3	0.0	+ 2.1	+4.1	+3.8	–0.9	+5.9	+7.7	**+2.8**
	vs 2019	+14.8	+12.1	+9.8	+6.8	+8.8	+16.4	+11.5	+17.4	+3.0	+14.0	+19.9	**+12.4**

		Northern and Western Europe						Southern Europe			Central Europe		
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Grocery retail – price and volume growth													
Volume[15] percent change	vs 2021	–4.5	–6.1	–4.8	–0.5	–4.0	–7.4	–5.4	–1.0	–5.6	–2.8	–2.5	**–3.6**
	vs 2019	+1.6	+1.8	–1.2	+3.9	+0.2	+6.1	–3.4	+6.9	+5.2	–0.1	+0.4	**+2.3**
Basket size volume[16] percent change	vs 2021	–5.8	–7.8	–10.9	–4.5	–5.8	–7.4	–5.3	–3.2	–11.0	–7.4	–3.5	**–5.8**
	vs 2019	+4.7	+14.0	+0.1	+3.8	+5.4	+8.3	+0.2	+1.1	–2.7	+6.6	+16.0	**+5.5**
Frequency percent change	vs 2021	+1.4	+1.8	+ 6.8	+4.2	+1.9	0.0	–0.1	+2.3	+6.1	+5.0	+1.0	**+2.3**
	vs 2019	–3.0	–10.7	–1.3	+ 0.1	–4.9	–2.0	–3.7	+5.8	+8.1	–6.3	–13.4	**–3.0**
Food & beverage price changes (inflation) percent change	vs 2021	+12.5	+10.9	+10.7	+7.3	+9.0	+11.7	+ 11.6	+9.3	+13.0	+17.0	+14.4	**+ 10.7**
	vs 2019	+18.7	+12.0	+12.6	+10.1	+11.4	+14.6	+16.4	+11.5	+16.1	+ 23.5	+23.1	**+ 14.3**
Up/down trading percent change	vs 2021	–6.1	–3.1	–0.7	–3.2	–2.7	–0.1	–3.2	–3.3	–4.9	–6.0	–0.2	**–3.6**
	vs 2019	–4.9	–1.0	+4.8	–4.8	+1.1	–1.3	–1.7	–4.7	–6.1	–6.9	–0.8	**–3.0**
Other key grocery indicators													
Online-channel market share percent, full year		3.7	11.7	8.0	8.9	4.2	6.2	2.6	3.0	2.5	3.8	1.9	**6.1**
Private-label value share[17] percent, full year		33.7	50.9	43.7	37.8	38.7	25.1	29.2	30.5	42.2	28.0	21.1	**36.3**
Private-label value share[17] p.p. share change	vs 2021	+3.2	+1.3	+2.3	+1.1	+2.0	+1.5	+2.9	+1.7	+3.9	+2.3	+0.8	**+1.9**
	vs 2019	+2.4	+0.8	+1.2	+0.7	+0.6	+2.9	+4.2	+3.1	+6.2	+5.3	+2.7	**+1.9**
Promo share percent, full year		20.4	25.7	20.9	14.9	20.1	37.7	11.8	33.7	24.3	53.0	24.2	**22.4**
Promo share p.p. share change	vs 2021	+1.6	–3.0	–0.4	–0.7	–0.8	+1.8	–0.8	–3.9	–0.8	+0.6	–1.8	**–0.9**
	vs 2019	+2.1	–6.8	–0.1	0.0	N/A	+9.8	–1.1	–7.5	–1.2	+0.9	+0.9	**–1.3**
Consumer indicators													
Consumer confidence points change, full year	vs 2021	–14.7	–24.0	–21.8	–11.2	–16.1	–21.8	–13.7	–14.4	–14.5	–17.0	–8.3	**–15.7**
	vs 2019	–17.9	–25.8	–18.5	–10.0	–9.0	–13.4	–20.0	–8.8	–23.2	–28.5	–20.2	**–16.8**
Eco-active consumers[18] percent, full year		32.0	24.0	25.0	20.0	20.0	N/A	12.0	24.0	19.0	9.0	24.0	**23.2**
Eco-active consumers[18] p.p. share change	vs 2021	–13.0	–3.0	+2.0	+1.0	–14.0	N/A	–8.0	–3.0	–5.0	–2.0	–4.0	**–5.5**
	vs 2019	–1.0	0.0	+8.0	+2.0	–0.4	N/A	–4.0	N/A	N/A	–4.0	+6.0	**+0.5**

1 Weighted according to total grocery revenues for each country. If for a given KPI group the data is not available for some contries, these countries are excluded from the weighted average.

2 Data measures the value of fast-moving consumer goods (FMCG) and fresh purchases that are taken home (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 Inflation-adjusted grocery retail value growth

6 Includes food and beverage service activities providing complete meals or drinks fit for immediate consumption (eg, traditional restaurants, self-service, or takeaway restaurants).

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 Any FMCG and fresh products bought on the Internet and either delivered or collected.

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

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

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

13 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).

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

15 Number of units sold.

16 Average number of units sold per basket.

17 Private label is defined as any brand/product that is owned and sold by an individual retailer and not sold by other retailers. This includes any product with the store name in the brand such as [Store name] Cornflakes and similar. It includes all "brands" sold by discounters or any other retailer that are owned and sold exclusively in their own stores. Fresh products sold with a retailer name/exclusive "brand" on the shopper package/receipt are included; loose no-name fresh products are excluded.

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