NEW REPORT

FRANCE GROCERY 2018

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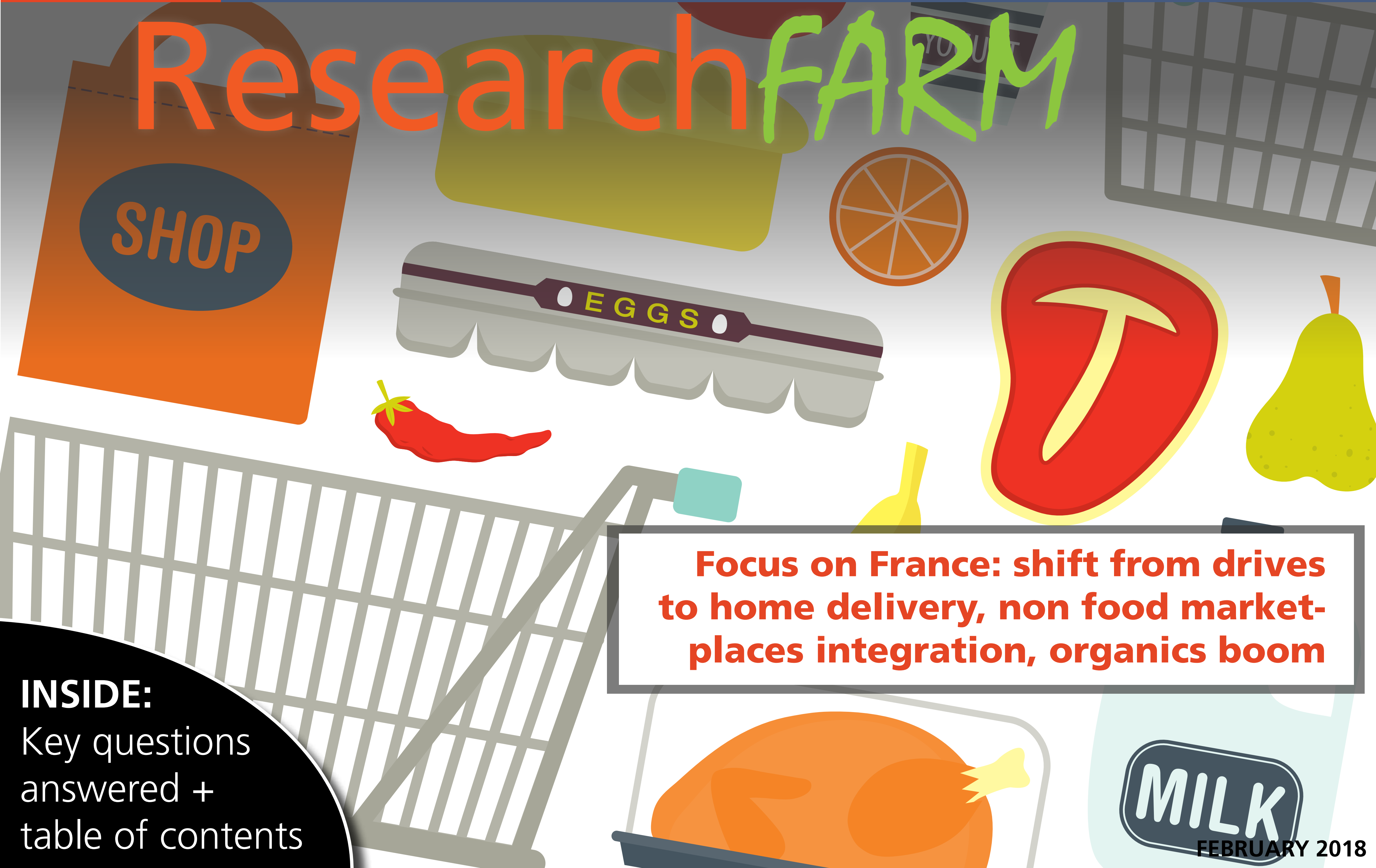

Focus on France: shift from drives to home delivery, non food market-places integration, organics boom

INSIDE:
Key questions answered + table of contents

FEBRUARY 2018

INTRODUCTION

With €186bn in sales France has become the biggest grocery market in the EU. 2017 saw significant changes in the sector with E.Leclerc becoming the biggest grocer and toppling Carrefour of its perch, which it had occupied for decades.

In recent years it has been claimed that in France the rise of the discounters has been successfully checked, especially as Dia, Franprix, and Leaderprice have had such a tough time, so that the two former are being converted into convenience fascias.

That said the originals Lidl and Aldi are far from neutered, in fact Lidl is the fastest growing retailer in the entire French market. Aldi has been growing as well, but at a lot slower pace and is now refreshing its proposition and stores. In fact France is one of the few countries where Lidl has managed to outperform Aldi.

Regarding online, the drive boom is now over, due to legislation and saturation, so that the rate of openings has significantly slowed. Moreover there is a shopper behaviour shift towards ultra fast deliveries (hence the Ocado/Monoprix deal) and most of the big players are pushing innovative partnerships with logistics start ups to speed up same day deliveries.

France is also the market where halal ranges have seen most development (due to the population structure) and also where organic has been booming. Organic range development has been followed in importance by local, artisanal products, backed by French cuisine and an agricultural sector with many small scale, high end, premium producers supported by the CAP.

KEY QUESTIONS ANSWERED

- What has happened to the buying alliances? How much further is there to go to raise further synergies? Especially as the FMCG/centre store ranges are coming under pressure? When will the competition authorities get involved?

- How good is the Casino Cdiscount integration in physical stores? Why was the Cdiscount acquisition a master stroke?

- How much sales do the best performing hypers from Auchan generate, still the sales density champion despite all the trouble the business is in?

- Is there room for more consolidation/M&As?

- What are Lidl's plans? Will its supermarketisation continue? Or have the limits been reached?

- When will AmazonFresh launch in France?

- Will Carrefour's digital transformation succeed? Why is Carrefour losing ground with its Rue de Commerce integration?

- Why are the drives almost exclusively a French success story that hasn't been replicated elsewhere?

FEATURES

- A detailed map of the sector, French grocery market sizes, shares, data, consumer spend data
- Leading retailers profiles, strategic developments, directions and innovations
- Deep dive into the hot issues: buying alliances, discounters, online transformations, drives and the shift to home delivery
- Non food marketplaces integration into grocers – the threat from Amazon

BENEFITS

- Understand the French market, opportunity, threats, strength, weaknesses,
- Spot the potential for gaps, growth dynamics, which niches are outperforming
- Understand what innovations could be transferred and work in another market
- Learn where France is similar to other grocery markets and where it differs and negotiate the pitfalls

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TABLE OF CONTENTS 1/4

TABLE OF CONTENTS 2/4

TABLE OF CONTENTS 3/4

TABLE OF CONTENTS 4/4