



## December 2006

### Food Retailing - Europe

Much of the recent growth in the market leaders has come from non-food development, but consumers do not rate non-foods as very important in the retail proposition.

### Food Retailing - Spain

In recent years the discounters have built a considerable presence in the Spanish market, where their price-conscious approach is finding favour with consumers already accustomed to a strong own-brand and private label culture. This, combined with the hypermarkets having their hands tied when it comes to expansion, due to restrictive ...

### Food Retailing - France

The French market is heavily competitive, mature and limited by planning restrictions. So growth prospects are constrained and we predict that food retailers will slowly lose further share of all retail sales. International expansion will continue to be an important growth strategy for many French food retailers, although they will ...

## October 2006

### Clothing Retailing - Europe

Clothing Retailing - Europe consists of 19 country sections, along with all 18 Major Profiles, all Mini Profiles, a pan-European Summary and Outlook with forecasts of sector sales by country for all, sections on TGI consumer research data in the four key markets of France, Germany, Spain, and the UK and ...

### Clothing Retailing - France

From mid-2005 the French economy as a whole returned to stronger growth levels and this continued into the early stages of 2006. Consumer spending has been one of the driving forces, growing by almost 6% in nominal terms for calendar year 2005. But clothing has underperformed relative to all consumer ...

### Food Retailing - Netherlands

During the recent tough times in the Netherlands, food retailers performed ahead of all retail sales, which from 2003 actually fell for three consecutive years. Clearly this was thanks to food being a non-discretionary area of spending. However, the food sector has certainly not had an easy ride either. A ...

### Food Retailing - Germany

The outlook for the German food retail sector depends heavily on when the economy finally starts to pick up.

### Food Retailing - Italy

A sluggish economy and food price increases has caused a slow down in food consumption in recent years. These economic pressures are felt more strongly in Southern Italy, where unemployment is widespread. As a result, more consumers are basing their choice of food purchases on price rather than quality. Discount ...

### Clothing Retailing - Spain

We believe that consumer spending over the past five years in Spain has been exceptionally buoyant compared to many of the other European markets. GDP has been strong over the period, which has helped offset the economic damage caused by fairly high unemployment levels. Nevertheless, we believe that the trend ...

### Clothing Retailing - Germany

Retailing in Germany has been a dismal affair over the past five years. Total retail sales would have fared very badly if it were not for the slight upturn from 2004 onwards, but clothing specialists' sales, although more erratic, have been worse. As mentioned earlier, price deflation in the clothing ...



### Clothing Retailing - Italy

Total consumer spending has seen steady growth over the past five years, boosted somewhat by large rises in the cost of utilities. However, the same cannot be said of spending on clothing. In the face of a poorly performing economy, and a raft of political uncertainties, spending dropped back significantly ...

### Clothing Retailing - Netherlands

Media reports suggest that attitudes to clothing amongst the Dutch seem to be slowly changing, with younger consumers in particular attaching less importance to being 'well-dressed', and to buying high value clothing items.