



## December 2018

### European Retail Rankings - Europe

The European Retail Rankings focusses on the leading retailers in Europe and puts them in perspective. This is a report where the numbers are all important, though we also give some background information both by sector and by country. We provide a three-year record of the main statistics (in so ...

## November 2018

### Supermarkets - Spain

“Retail sales are growing again in Spain. Consumers look for low prices, and value for money, but they also rate fresh foods as very important in choosing where to shop. Mercadona has cottoned on to that demand and we think that the discounters are doing so as well. The conditions ...

### Supermarkets - Germany

“The German grocery retailers are struggling to overcome the issues related to operating in a very mature sector. Growth has to come from taking share from each other but the propensity of German consumers to split their spending across wherever is most convenient, best value or highest quality makes it ...

### Supermarkets - Europe

“Mintel’s report on supermarkets in Europe paints a picture of a sector struggling with the problems of maturity. There is much less scope for new store development in Western Europe, while competition is increasing. Aldi and Lidl are expanding hard on the back of their improved formats, and online competition ...

### Supermarkets - Italy

“Although consumer spending and retail sales growth appears to have slowed in 2018, the leading grocery retailers in Italy have continued to perform well. As a result, there is ongoing consolidation in what has traditionally been a highly fragmented market. Once reluctant to embrace the online channel, most of the ...

### Supermarkets - France

“Grocery retailing in France is changing – people are shopping less at hypermarkets and more at local, convenience stores. The digital world is making shoppers more demanding and online grocery is beginning to develop beyond the Drive click and collect model. Several retailers have introduced rapid home delivery services in ...

## October 2018

### Clothing Retailing - Europe

“We know that online is changing the nature of clothing retailing, but it is less clear just how much and whether what we are seeing in the best developed online

### Clothing Retailing - Germany

“Spending on clothing grew 6.6% in 2017, but there is huge variation in the performance of the specialist retailers as many of the long-established players



countries, notably the UK, will be followed elsewhere in Europe. We think that it will. Margins on branded ranges are ...

continue to struggle to fully understand how the shopping habits and demands of their customers have changed in recent years.”

– Thomas Slide ...

## Clothing Retailing - France

“In a low growth market, the French retail clothing sector is changing. Online is encroaching on specialists’ sales and exposing weaknesses in the traditional retailers, many of which are closing stores and restructuring. Social media is now a crucial tool for reaching younger customers, and environmental concerns are set to ...

## Clothing Retailing - Spain

“Clothing retailing is changing in Spain. At the head of the sector, Grupo Inditex continues to perform well, but there are newcomers both in-store (eg Primark) and online (Zalando, Privalia and Amazon) that are challenging the status quo. They are raising the stakes in clothing retailing and will make it ...

## Clothing Retailing - Italy

“Italy is the largest of the four big European markets (eg France, Germany, Italy, Spain) in terms of per capita spend on clothing and footwear. However, in the past few years, growth in spending has stalled, and it is clear that the underdeveloped nature of the online channel has contributed ...

## September 2018

### European Retail Handbook - Europe

This is the 22nd edition of the European Retail Handbook. It provides basic data about all the major European countries, their economies and their retail sectors. The handbook complements Mintel’s major sector reviews, such as DIY, Supermarkets and Clothing, adding more detail and information about smaller economies.

## August 2018

### Luxury Goods Retail - International

“The global luxury goods industry is going through a significant period of change. As young consumers are fast becoming key purchasers of high-end fashion, luxury houses need to adapt. This has resulted in polarised performances amongst the leading players. Those that were slower to respond have lost market share, whilst ...



## July 2018

### Online Retailing - Germany

“German e-commerce has continued to experience strong growth but it is dominated by the pureplayers and is skewed heavily towards particularly product categories. While the clothing and electrical sectors are now well-established online, other categories, including food, remain remarkably underdeveloped, providing the potential for further growth in the future.”

### Online Retailing - France

“Online retailing in France is generally at a medium stage of development, behind the countries of northern Europe, but ahead of those in the south. Amazon dominates, but less so than in most other countries, due to relatively strong propositions from domestic retailers. The next area of growth will ...

### Online Retailing - Spain

“Online retailing in Spain lags behind development in, for example, Germany or the UK, but it has all the key elements already in place. There is an online grocery retailing sector, which is becoming well established, led by Mercadona. Fashion is successful online and is led by Zara ...

## May 2018

### DIY Retailing - France

“French DIY is a tough market for specialists at the moment. Competition has intensified as consumers have become more accustomed to buying online and non-specialists, such as electricals retailers and grocers, have increased their share of spending using marketplaces to expand their offer from third parties. Market leader, Leroy Merlin ...

### DIY Retailing - Spain

“After a prolonged and painful recession, the DIY sector is showing signs of a strong recovery. Both the spending and specialist retailers’ sales figures are moving the right way. Even house prices have started to recover. This should be the right environment for the DIY retailers to expand again, though ...

### Online Retailing - Europe

“Online is growing fast and it will continue to do so. It is still immature, even in the more developed countries, such as the UK and Germany, and in many sectors, especially fashion, the established store-based players have yet to mount an effective counter attack. But the example ...

### Online Retailing - Italy

“Online retailing in Italy lags behind the UK and Germany, but it is developing rapidly as more people get online and barriers, such as unreliable delivery and low credit card ownership, are overcome. Once people are online they appear to be keen shoppers – the mobile sector is particularly important ...

### DIY Retailing - Italy

“Italy’s DIY specialist retailers saw sales expand for a fourth consecutive year in 2017, albeit with very low growth, buoyed by a brief improvement in the housing market. However, house prices have since begun slipping back and the market remains depressed. The number of consumers planning to spend on home ...

### DIY Retailing - Germany

“However one looks at the DIY sector in Germany, it is hard to paint a rosy picture. It is under pressure as all the main macro-economic and demographic factors are moving against it. We do not forecast a sudden collapse, just a long slow decline. The opportunities in the sector ...



## DIY Retailing - Europe

“There has been a marked contrast in recent strategy between the two leaders in European DIY. On the one hand there is an approach typified by ADEO (whose main business is Leroy Merlin) with a very customer-focussed, service-led strategy. On the other we have seen a cost-led strategy at Kingfisher ...

## April 2018

### Department Stores - Italy

“The department store sector in Italy saw weak growth in 2017 as both Coin and Rinascente are losing share of spending to specialist retailers. Both department stores need to broaden their appeal to attract less affluent and younger consumers. While the Italian online market is still underdeveloped, as e-commerce grows in ...

### Department Stores - France

“The French department stores are heavily reliant on their Parisian flagship stores and on tourists. As a result they were hit hard by the downturn in foreign visitors that followed the terrorist attacks in Paris (November 2015) and Nice (June 2016). The format is much less important to retailing than ...

### Department Stores - Europe

“There is enormous variation between countries in the development of department stores. At one extreme there is Spain, where the only department store is the country’s leading non-food retailer. At the other extreme there are countries like Austria, where the sector scarcely exists. Italy has a couple of high profile ...

## February 2018

### Electrical Goods Retailing - Italy

“Italy lags a long way behind the rest of Western Europe in retail development and especially in online development. Electricals retailing is still very fragmented across the board and online we estimate that even the leading player via that channel, Amazon, has a market share of under 2%. Change is ...

### Department Stores - Spain

“As the only department store in Spain, El Corte Inglés is facing growing competition from more agile and lower-priced specialist retailers. In order to compete El Corte Inglés needs to broaden its appeal and move away from a reliance on older and wealthier customers. It also needs to stand out ...

### Department Stores - Germany

“There are signs of the beginnings of a recovery in the German department stores sector. New ownership and a more focussed management now shorn of too many diversifications are a good start. The consumer research for this report shows that the stores are still valued for many of the things ...

### Electrical Goods Retailing - Spain

“While the economic climate in Spain has greatly improved and spending on electrical items has increased for the past four years, electrical specialists have been steadily losing market share, largely to the online channel and particularly to the likes of Amazon. Specialists must look not just to match Amazon in ...



### Electrical Goods Retailing - Germany

“Consumer spending on electrical goods continued to weaken in 2017 as higher inflation in other product categories led consumers to spend more elsewhere. Online is now the channel of choice for Germans shopping for electricals, with 70% of electrical goods shoppers buying via any device in the past year and ...

### Electrical Goods Retailing - Europe

“This 2018 report paints a picture of online retailing growing strongly again. Amazon is by far the most used retailer in Europe. Yet we think that there will always be a demand for stores – for the display and for the helpful service. It’s time for more of ...

### Electrical Goods Retailing - France

“The electricals market in France is robust, but the retail landscape has been changed dramatically by digitalisation. As Amazon has increased its dominance, the established players have fought back with a series of acquisitions and partnerships, with the purchase of Darty by Fnac the most high profile. The online ...

## January 2018

### Beauty and Personal Care Retailing - Italy

“Although the Italian BPC market remains fragmented, there is ongoing consolidation in the market as a number of the leading specialists strengthen their position. As the economy continues to recover, there will be new opportunities for retailers to capture increased spending on beauty and personal care. Having a differentiated offer ...

### Beauty and Personal Care Retailing - Germany

“There is growing pressure on the market leaders in beauty and personal care retailing in Germany. Online is growing, with Amazon an increasingly important player. There are newcomers in the specialist cosmetics and perfumery sectors. We think that some of the market leaders are already showing signs of this increased ...

### Beauty and Personal Care Retailing - Europe

“Retailing of beauty and personal care products is poised for change. It looks as if the mass market drugstores are approaching maturity in some countries while the retailers with the greatest potential are those

### Beauty and Personal Care Retailing - Spain

“As the Spanish political situation becomes more uncertain with lower rates of economic growth forecast for 2018, beauty specialists will need to work harder to compete with the growing force of supermarkets and fashion retailers that are grabbing share of the beauty market. They need to focus on improving the ...

### Beauty and Personal Care Retailing - France

“French specialist beauty and personal care retailers are doing well, increasing their share of a sluggish market. Sephora leads by some margin, but Nocibé, now under the Douglas umbrella, is doing well and Kiko Milano is expanding rapidly. With 30% of female BPC buyers having shopped online, and 47% often ...



## European Retail Intelligence - Continental Europe



with innovative own brands. But specialists who can provide the right environment plus a range of ...