



December 2019

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 2019

Supermarkets - Spain

“While Mercadona continues to be the leading player in Spain by far, the retail landscape is shifting as Lidl is making strides in the market to compete harder with the likes of Auchan and Dia. Consumers are taking a more multichannel approach when it comes to grocery shopping and the ...

Supermarkets - Italy

“As in many other European markets, discounters are growing their sales much faster than the market average and, as a result, are rapidly increasing their share of the Italian grocery market. In the context of a market where consumers’ incomes have been squeezed by low economic growth and spending on ...

Supermarkets - Europe

“European supermarkets continue to face the challenges of a mature and increasingly competitive market. While in certain countries of Eastern Europe there is still some room for growth, in most Western European economies the leading players are being forced to act defensively and to continue to innovate not to lose ...

Clothing Retailing - France

“The French clothing market is undergoing significant structural shifts; online is capturing more spending and technology is increasingly influential in the buying journey. Stores are finding it increasingly hard to find reasons to entice customers through the door. As a

Supermarkets - Germany

“After seeing sales increase 3.7% in 2018, grocery retailers are facing a challenging year in Germany and struggling to hold on to market share in a very mature market. As most Germans split their grocery spend across different retailers, supermarkets and food discounters continue to fight a hard battle ...

Supermarkets - France

“French grocery retailers are having to adapt to their changing environment. Hypermarkets in general are struggling and businesses are looking for innovative ways to maintain their relevance. Legislation that limits the extent of price cutting is keeping prices high for shoppers, particularly on fresh foods. The discount segment looks set ...

Clothing Retailing - Europe

“Clothing and footwear represent the largest and most important non-food sector in retailing, and ranks second after food in retailing overall. One could argue that this is why the sector remains the focus for development for a number of different non-specialists, from supermarkets to sports good retailers. Clothing specialists are ...

Clothing Retailing - Germany

“Spending on clothing in Germany stagnated in 2018, declining 0.5% compared to the previous year. Some of the leading specialists have achieved strong growth and increased their revenues at double-digit rates, mostly by effectively combining offline and online channels and



result many of the previously safe middle market retailers are ...

taking measures to remain relevant to their target audiences ...

Clothing Retailing - Italy

“Although they still account for around two-thirds of all spending on clothing and footwear, specialist clothing retailers in Italy are facing a sustained onslaught from a range of sources: rivals discounting excess stock, sports goods retailers capitalising on the trend towards casualisation and the popularity of athleisurewear, online retailers (both ...

Clothing Retailing - Spain

“The Spanish clothing sector faces a major shake-out before it reaches a state of equilibrium again.” Online is raising the stakes in fashion retailing and there is nowhere to hide. This is no place for risk-averse strategies. More demanding consumers are going to shop from the retailers that serve ...

October 2019

European Retail Handbook - Europe

This is the 23rd 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 2019

Luxury Goods Retail - International

“The global luxury goods market resisted some major headwinds in 2018, with ongoing political and economic uncertainty in a number of the key markets, as well as a decline in the population of High Net Worth Individuals. In spite of these challenges, consumer demand has remained robust and the leading ...

July 2019

Online Retailing - Spain

“Spanish online shoppers remain extremely price- and value-conscious. However, there are opportunities for retailers to drive growth in their online sales through a relentless focus on innovation, particularly in the area of m-commerce. By implementing ‘mobile first’ strategies

Online Retailing - Italy

“Online retailing in Italy is growing, but slowly. Foreign online pureplayers (Amazon and Zalando, for example) are making a big impact and driving the response from Italian retailers. But there is still a long way to go. The infrastructure is developing, in terms of online exposure and device ownership, and ...



and by making constant improvements to fulfilment options they can differentiate their ...

Online Retailing - Germany

“Germany has traditionally been a key driver of the growth in value of the European online retailing industry but in the past year or so its performance has started to soften relative to the other main European markets. There are many reasons for this but we feel that lower than ...

Online Retailing - France

“Although online remains only a small part of total retail sales in France, it continues to grow in double figures each year. Most people now shop online, and it has become an integral part of the buying journey, whether that purchase is ultimately made in-store or online. Many of the ...

Online Retailing - Europe

“Online is the growth sector in retailing everywhere. But it has reached strikingly different stages of development around Europe. There’s a North-South Split with Northern Europe much further ahead than Southern Europe. It is tempting to say that the South will follow the North in due course and that the ...

May 2019

DIY Retailing - Spain

“Specialists that survive and thrive in DIY are going to be the ones who most effectively combine the benefits of having a physical store estate (click and collect, product displays, demonstrations and advice etc) with a sophisticated online operation to match the range, availability and speed of fulfilment that the ...

DIY Retailing - Italy

“DIY retailing in Italy remains highly fragmented, with most distribution still passing through small- and medium-sized retailers. But larger-scale retailing is growing and the sector is consolidating slowly as foreign retailers, mainly from France, are expanding. The largest chain is ADEO’s Leroy Merlin, but even this only generates 12% of ...

DIY Retailing - Germany

“The DIY specialists have been losing share of DIY spending. Since 2013 the equivalent of all of the sales of Praktiker (which failed in 2013) have been lost by the specialists and as the decline is continuing there must be concerns that further rationalisation will be necessary.”

– Richard ...

DIY Retailing - France

“DIY retailing in France is relatively robust, although market leader Leroy Merlin dominates and sets the bar high for its rivals. Its closest rival is Kingfisher-owned Castorama, which is half the size and in something of a crisis. Consumer shopping behaviour is changing and retailers need to evolve to meet ...

DIY Retailing - Europe

“The general story around Europe is that the DIY specialists are under pressure. Levels of home ownership are falling and people are less able or less willing to undertake major projects. So their general DIY needs are often served by non-specialists, from



hypermarkets to non-food discounters. We think that the ...

April 2019

Footwear Retailing - Spain

“Specialist footwear retailers need to reclaim the territory that they have ceded, whether to non-specialists or online-only retailers, by focusing on their expertise, customer service levels and the quality of their products. To get back in the game with trainers/sneakers, some operators could benefit from acquisitions to gain a ...

Footwear Retailing - Germany

“For the majority of the retail sector the underlying dynamic is the challenge from online retailers. But the footwear specialists have suffered less than most and appear to be fighting back effectively. But that overall view is driven by the success of Deichmann and we think that many of the ...

Footwear Retailing - Europe

“Demand for footwear has grown almost everywhere in the last five years, but unlike in so many other retail sectors, the footwear specialists, and certainly the larger multiples, have been able to broadly maintain their share of sales. Many of them have expanded their own online propositions, expanded their store ...

Footwear Retailing - Italy

“Italians spend the most per head on footwear of consumers in the big four European markets covered in this report series, making it an attractive and potentially lucrative market for footwear retailers. But growth in spending has slowed in recent years as consumer confidence has declined due to the country’s ...

Footwear Retailing - France

“Footwear retailing in France is changing as non-specialists, such as sports, fashion and online-only retailers, are capturing more spending. The middle market and those retailers stuck on the high street or in shopping centres are being squeezed as consumers’ shopping preferences are changing. Selling shoes online can be challenging, but ...

February 2019

Electrical Goods Retailing - France

“Electricals retailing in France is challenging due to the growth of online retailing and downward price pressures from the intense competition. Fnac Darty is the market leader, itself the result of a merger in 2016, and we are seeing several partnerships and alliances as specialists and non-specialists seek to shore ...

Electrical Goods Retailing - Italy

Electrical Goods Retailing - Germany

“Online retailers continued to gain share and retailers such as Amazon have used promotional periods (Prime Day and Black Friday) to put increased pressure on the store-based retailers. MediaMarkt Saturn, the market leader, has seen its market share fall, but we think that the pressure is greatest on the ...

Electrical Goods Retailing - Spain



“Our consumer research shows opportunities for retailers to make their stores more customer-friendly and experiential, becoming somewhere where they are advised on and introduced to the technology they want. Increasing the spotlight on customers could also help to shift buyers’ focus away from being so much on price and allow ...

“Although the business environment in terms of the Spanish economy has been much improved in the past five years, specialist store-based electrical retailers have continued to lose market share to the online channel, especially Amazon. If they are going to make their stores work effectively for them, they must seek ...

Electrical Goods Retailing - Europe

“There appear to be too many electrical retailers and this report paints a picture of the sector slowly coming to terms with the degree of rationalisation necessary. This year Amazon has moved up into top place in Europe, highlighting the problems of the store-based market leaders, Ceconomy (MediaMarkt Saturn ...

January 2019

Beauty and Personal Care Retailing - Germany

“It would be wrong to suggest that the beauty and personal care retailers have had it easy in recent years, though the failure of Schlecker did give them breathing space. We think they have used it well, strengthening their chains and regaining for the sector all the market share that ...

Beauty and Personal Care Retailing - Italy

“Italy’s BPC market is going through a period of change. The independents and regional chains are losing market share, whilst the leading specialists are capturing more spending as they continue to expand their geographical coverage. However, price competition is intense and the country’s economic recovery has once again slowed, meaning ...

Beauty and Personal Care Retailing - Spain

“Beauty and personal care specialists will have to offer a more compelling in-store and online experience in the next few years if they are to fend off the competitive challenge from non-specialist retailers. At the same time, they are going to have to adjust their business models to take into ...

Beauty and Personal Care Retailing - France

“In a low growth market, the French specialist beauty sector remains relatively stable, with several well-performing retailers, notably Sephora, creating a dynamic environment. Elements of spending are well suited to shopping online, and most retailers now sell this way, with varying degrees of digital integration. Amazon poses an ongoing threat ...

Beauty and Personal Care Retailing - Europe

“Beauty and personal care products (BPC) retailing is more varied around Europe than almost any other sector. From drugstores in Germany to supermarkets in other countries, the market is largely in the hands of



European Retail Intelligence - Continental Europe



non-specialists. But there is a fightback being staged by the specialists – Douglas has embarked on ...