



Passport

Hypermarkets in Spain

Euromonitor International

February 2022

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HYPERMARKETS IN SPAIN - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Slight recovery in sales for hypermarkets in 2021

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Some players shrink their hypermarkets

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Spanish consumers are losing interest in destination shopping

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PROSPECTS AND OPPORTUNITIES

Hypermarkets will offer A wider array of products and services

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Shop-in-shop agreements are likely to become more commonplace

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Store size will shrink, and hypermarkets will pivot towards e-commerce

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Content removed from sample

CHANNEL DATA

Table 1 Hypermarkets: Value Sales, Outlets and Selling Space 2016-2021

	2016	2017	2018	2019	2020	2021
Value sales EUR million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 2 Hypermarkets: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth	2020/21	2016-21 CAGR	2016/21 Total
Value sales EUR million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 3 Hypermarkets GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax Company	2017	2018	2019	2020	2021
--	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 4 Hypermarkets GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021
-------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 5 Hypermarkets LBN Brand Shares: Outlets 2018-2021

sites/outlets Brand (GBO)	Company (NBO)	2018	2019	2020	2021
------------------------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 6 Hypermarkets LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m Brand (GBO)	Company (NBO)	2018	2019	2020	2021
--	---------------	------	------	------	------

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 7 Hypermarkets Forecasts: Value Sales, Outlets and Selling Space 2021-2026

2021 2022 2023 2024 2025 2026

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms.

Table 8 Hypermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth
2021-2026

% growth

2021/22 2021-26 CAGR 2021/26 Total

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms.

RETAILING IN SPAIN - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Retailing in 2021: The big picture

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What next for retailing?

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OPERATING ENVIRONMENT

Informal retailing

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Opening hours

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Summary 1 Standard Opening Hours by Channel Type 2021

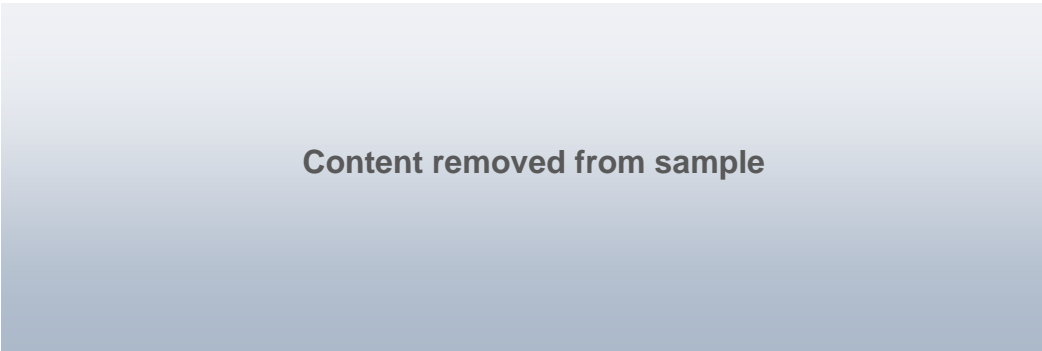
Channel	24-hour opening?	Monday-Thursday	Friday	Saturday	Sunday
Supermarkets	Content removed from sample				
Hypermarkets					
Discounters					
Convenience stores					
Traditional grocery retailers					
Non grocery retailers					
Department Stores					
Variety stores					

Source: Euromonitor International

Note: These reflect typical opening hours outside of lockdown

Physical retail landscape

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Cash and carry

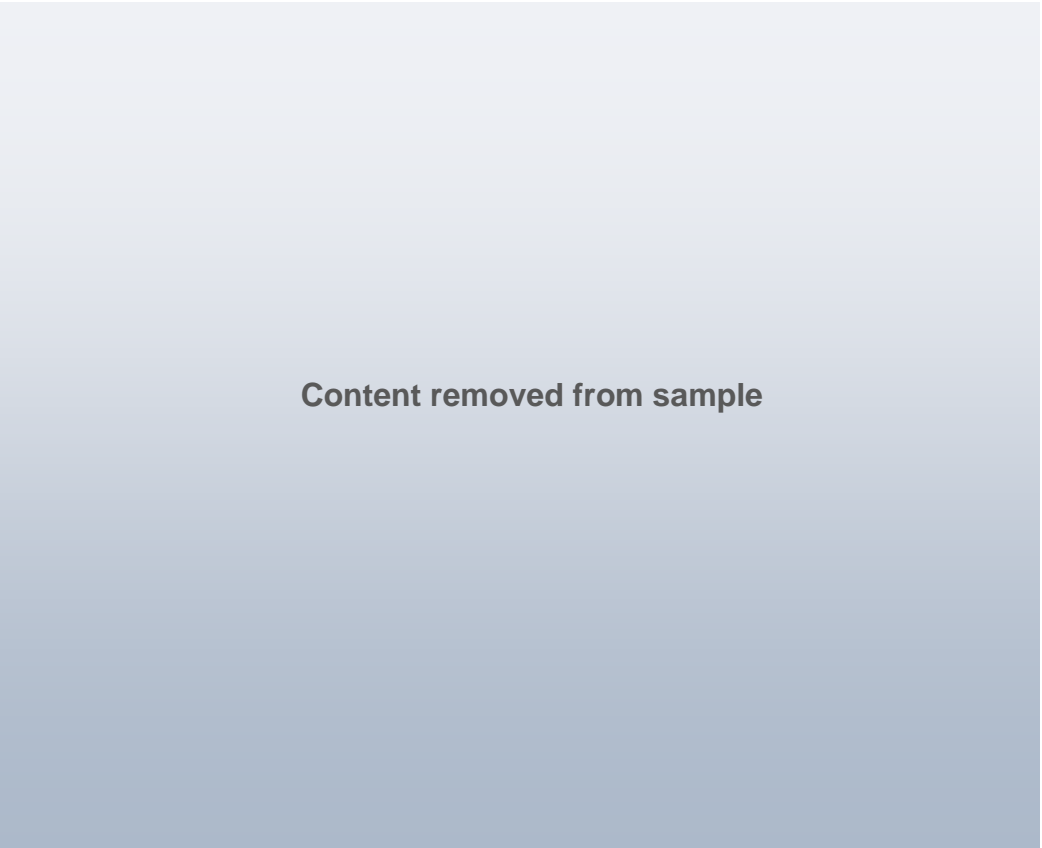


Table 9 Cash and Carry Sales: Value 2016-2021

€ million, current prices	2016	2017	2018	2019	2020	2021
Cash and carry % growth	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources
Note: Value sales exclude VAT sales tax

Seasonality

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Christmas

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January Sales

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Summer Sales

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Payments

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Content removed from sample

Delivery and collection

Content removed from sample

Emerging business models

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Content removed from sample

MARKET DATA

Table 10 Sales in Retailing by Store-based vs Non-Store: Value 2016-2021

EUR million

	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
Non-Store Retailing						
Retailing						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 11 Sales in Retailing by Store-based vs Non-Store: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
Store-Based Retailing	Data removed from sample		
Non-Store Retailing			
Retailing			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 12 Sales in Store-based Retailing by Channel: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Grocery Retailers	Data removed from sample					
Non-Grocery Specialists						
Mixed Retailers						
Luxury Retailing						
Off-Price Retailing						
Store-Based Retailing						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.

Note 2: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.

Table 13 Sales in Store-based Retailing by Channel: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
Grocery Retailers	Data removed from sample		
Non-Grocery Specialists			
Mixed Retailers			
Luxury Retailing			
Off-Price Retailing			
Store-Based Retailing			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.

Note 2: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.

Table 14 Store-based Retailing Outlets by Channel: Units 2016-2021

outlet	2016	2017	2018	2019	2020	2021
Grocery Retailers	Data removed from sample					
Non-Grocery Specialists						
Mixed Retailers						
Luxury Retailing						
Off-Price Retailing						
Store-Based Retailing						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.

Note 2: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.

Table 15 Store-based Retailing Outlets by Channel: % Unit Growth 2016-2021

% unit growth	2020/21	2016-21 CAGR	2016/21 Total
Grocery Retailers	Data removed from sample		
Non-Grocery Specialists			
Mixed Retailers			
Luxury Retailing			
Off-Price Retailing			
Store-Based Retailing			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.

Note 2: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.

Table 16 Sales in Non-Store Retailing by Channel: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Direct Selling	Data removed from sample					
Homeshopping						
Vending						
E-Commerce (Goods)						
Non-Store Retailing						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note 1: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Note 2: Mobile e-commerce (goods) not included in non-store retailing total to avoid double counting as this category is already accounted for within e-commerce (goods).

Table 17 Sales in Non-Store Retailing by Channel: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
Direct Selling	Data removed from sample		
Homeshopping			
Vending			
E-Commerce (Goods)			
Non-Store Retailing			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note 1: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Note 2: Mobile e-commerce (goods) not included in non-store retailing total to avoid double counting as this category is already accounted for within e-commerce (goods).

Table 18 Grocery Retailers: Value Sales, Outlets and Selling Space 2016-2021

	2016	2017	2018	2019	2020	2021
--	------	------	------	------	------	------

Value sales EUR million
Outlets
Selling Space '000 sq m

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 19 Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth

2020/21 2016-21 CAGR 2016/21 Total

Value sales EUR million
Outlets
Selling Space '000 sq m

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 20 Sales in Grocery Retailers by Channel: Value 2016-2021

EUR million

2016 2017 2018 2019 2020 2021

-- Convenience Stores
-- Discounters
-- Forecourt Retailers
-- Hypermarkets
-- Supermarkets
- Modern Grocery Retailers
- Traditional Grocery Retailers
Grocery Retailers

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 21 Sales in Grocery Retailers by Channel: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

2020/21 2016-21 CAGR 2016/21 Total

-- Convenience Stores
-- Discounters
-- Forecourt Retailers
-- Hypermarkets
-- Supermarkets
- Modern Grocery Retailers
- Traditional Grocery Retailers
Grocery Retailers

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 22 Grocery Retailers Outlets by Channel: Units 2016-2021

outlet	2016	2017	2018	2019	2020	2021
-- Convenience Stores	Data removed from sample					
-- Discounters						
-- Forecourt Retailers						
-- Hypermarkets						
-- Supermarkets						
- Modern Grocery Retailers						
- Traditional Grocery Retailers						
Grocery Retailers						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 23 Grocery Retailers Outlets by Channel: % Unit Growth 2016-2021

% unit growth	2020/21	2016-21 CAGR	2016/21 Total
-- Convenience Stores	Data removed from sample		
-- Discounters			
-- Forecourt Retailers			
-- Hypermarkets			
-- Supermarkets			
- Modern Grocery Retailers			
- Traditional Grocery Retailers			
Grocery Retailers			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 24 Non-Grocery Specialists: Value Sales, Outlets and Selling Space 2016-2021

	2016	2017	2018	2019	2020	2021
Value sales EUR million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 25 Non-Grocery Specialists: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth	2020/21	2016-21 CAGR	2016/21 Total
Value sales EUR million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 26 Sales in Non-Grocery Specialists by Channel: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
<ul style="list-style-type: none"> - Apparel and Footwear Specialist Retailers - Electronics and Appliance Specialist Retailers - Health and Beauty Specialist Retailers - Home and Garden Specialist Retailers - Leisure and Personal Goods Specialist Retailers - Other Non-Grocery Specialists Non-Grocery Specialists	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 27 Sales in Non-Grocery Specialists by Channel: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
<ul style="list-style-type: none"> - Apparel and Footwear Specialist Retailers - Electronics and Appliance Specialist Retailers - Health and Beauty Specialist Retailers - Home and Garden Specialist Retailers - Leisure and Personal Goods Specialist Retailers - Other Non-Grocery Specialists Non-Grocery Specialists	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 28 Non-Grocery Specialists Outlets by Channel: Units 2016-2021

outlet	2016	2017	2018	2019	2020	2021
<ul style="list-style-type: none"> - Apparel and Footwear Specialist Retailers - Electronics and Appliance Specialist Retailers - Health and Beauty 	Data removed from sample					

- Specialist Retailers
- Home and Garden Specialist Retailers
- Leisure and Personal Goods Specialist Retailers
- Other Non-Grocery Specialists
- Non-Grocery Specialists

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 29 Non-Grocery Specialists Outlets by Channel: % Unit Growth 2016-2021

% unit growth

2020/21 2016-21 CAGR 2016/21 Total

- Apparel and Footwear Specialist Retailers
- Electronics and Appliance Specialist Retailers
- Health and Beauty Specialist Retailers
- Home and Garden Specialist Retailers
- Leisure and Personal Goods Specialist Retailers
- Other Non-Grocery Specialists
- Non-Grocery Specialists

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 30 Mixed Retailers: Value Sales, Outlets and Selling Space 2016-2021

2016 2017 2018 2019 2020 2021

Value sales EUR million
Outlets
Selling Space '000 sq m

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 31 Mixed Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth

2020/21 2016-21 CAGR 2016/21 Total

Value sales EUR million
Outlets
Selling Space '000 sq m

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 32 Sales in Mixed Retailers by Channel: Value 2016-2021

EUR million

	2016	2017	2018	2019	2020	2021
- Department Stores - Mass Merchandisers - Variety Stores - Warehouse Clubs Mixed Retailers	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 33 Sales in Mixed Retailers by Channel: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
- Department Stores - Mass Merchandisers - Variety Stores - Warehouse Clubs Mixed Retailers	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 34 Mixed Retailers Outlets by Channel: Units 2016-2021

outlet	2016	2017	2018	2019	2020	2021
- Department Stores - Mass Merchandisers - Variety Stores - Warehouse Clubs Mixed Retailers	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 35 Mixed Retailers Outlets by Channel: % Unit Growth 2016-2021

% unit growth

	2020/21	2016-21 CAGR	2016/21 Total
- Department Stores - Mass Merchandisers - Variety Stores - Warehouse Clubs Mixed Retailers	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 36 Retailing GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax
Company

2017

2018

2019

2020

2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 37 **Retailing GBN Brand Shares: % Value 2018-2021**

% retail value rsp excl sales tax
Brand

Company (GBO)

2018

2019

2020

2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 38 Store-based Retailing GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021
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Data removed from sample

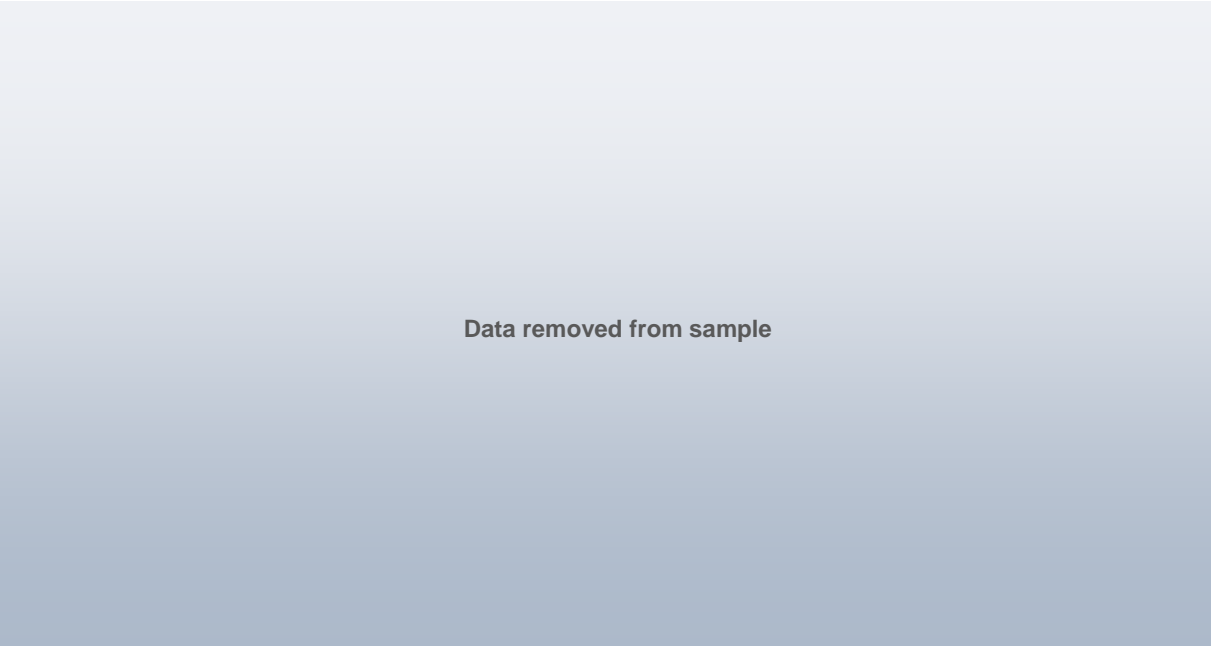
Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 39 Store-based Retailing GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021
-------	---------------	------	------	------	------

Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 40 Store-based Retailing LBN Brand Shares: Outlets 2018-2021

sites/outlets Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Data removed from sample					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 41 Non-Store Retailing GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax					
Company	2017	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Table 42 Non-Store Retailing GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax					
Brand	Company (GBO)	2018	2019	2020	2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Table 43 Grocery Retailers GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax	2017	2018	2019	2020	2021
Company					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 44 Grocery Retailers GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax					
Brand	Company (GBO)	2018	2019	2020	2021

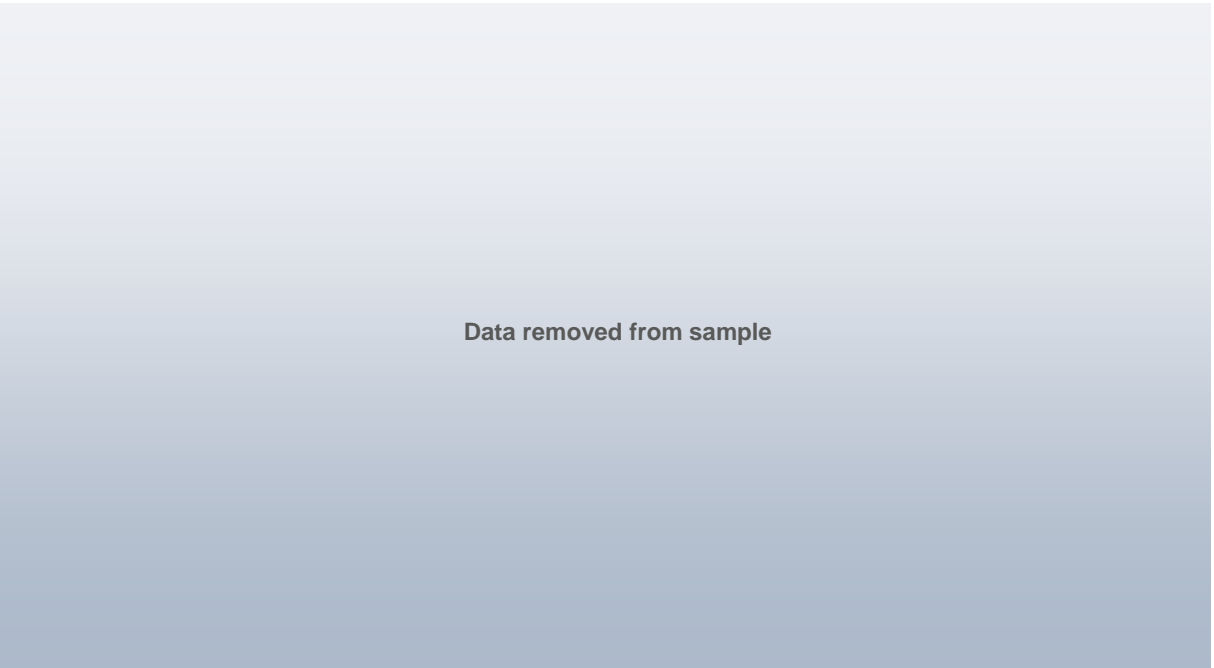
Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 45 Grocery Retailers LBN Brand Shares: Outlets 2018-2021

sites/outlets					
Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 46 Grocery Retailers LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m Brand (GBO)	Company (NBO)	2018	2019	2020	2021
<div><div></div><div>Data removed from sample</div></div>					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 47 Non-Grocery Specialists GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax	2017	2018	2019	2020	2021
Company					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 48 Non-Grocery Specialists GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax		2018	2019	2020	2021
Brand	Company (GBO)				

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 49 Non-Grocery Specialists LBN Brand Shares: Outlets 2018-2021

sites/outlets Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Data removed from sample					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 50 Non-Grocery Specialists LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 51 Mixed Retailers GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax	2017	2018	2019	2020	2021
Company					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 52 Mixed Retailers GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax		2018	2019	2020	2021
Brand	Company (GBO)				

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 53 Mixed Retailers LBN Brand Shares: Outlets 2018-2021

sites/outlets		2018	2019	2020	2021
Brand (GBO)	Company (NBO)				

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 54 Mixed Retailers LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m					
Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 55 Forecast Sales in Retailing by Store-based vs Non-Store: Value 2021-2026

EUR million	2021	2022	2023	2024	2025	2026
Store-Based Retailing	Data removed from sample					
Non-Store Retailing						
Retailing						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms.

Table 56 Forecast Sales in Retailing by Store-based vs Non-Store: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total
Store-Based Retailing	Data removed from sample		
Non-Store Retailing			
Retailing			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 57 Forecast Sales in Store-based Retailing by Channel: Value 2021-2026

EUR million

	2021	2022	2023	2024	2025	2026
Grocery Retailers	Data removed from sample					
Non-Grocery Specialists						
Mixed Retailers						
Luxury Retailing						
Off-Price Retailing						
Store-Based Retailing						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note 1: Forecast value data in constant terms.

Note 2: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.

Note 3: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.

Note 4: No forecast data available for luxury and off-price retailing.

Table 58 Forecast Sales in Store-based Retailing by Channel: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total
Grocery Retailers	Data removed from sample		
Non-Grocery Specialists			
Mixed Retailers			
Luxury Retailing			
Off-Price Retailing			
Store-Based Retailing			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.

Note 2: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.

Note 3: No forecast data available for luxury and off-price retailing.

Table 59 Forecast Store-based Retailing Outlets by Channel: Units 2021-2026

outlet	2021	2022	2023	2024	2025	2026
Grocery Retailers	Data removed from sample					
Non-Grocery Specialists						
Mixed Retailers						
Luxury Retailing						
Off-Price Retailing						
Store-Based Retailing						
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources					
Note 1:	Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.					
Note 2:	Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.					
Note 3:	No forecast data available for luxury and off-price retailing.					

Table 60 Forecast Store-Based Retailing Outlets by Channel: % Unit Growth 2021-2026

% unit growth	2021/22	2021-26 CAGR	2021/26 Total
Grocery Retailers	Data removed from sample		
Non-Grocery Specialists			
Mixed Retailers			
Luxury Retailing			
Off-Price Retailing			
Store-Based Retailing			
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources		
Note 1:	Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.		
Note 2:	Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.		
Note 3:	No forecast data available for luxury and off-price retailing.		

Table 61 Forecast Sales in Non-Store Retailing by Channel: Value 2021-2026

EUR million	2021	2022	2023	2024	2025	2026
Direct Selling	Data removed from sample					
Homes shopping						
Vending						
E-Commerce (Goods)						
Non-Store Retailing						
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources					
Note 1:	Forecast value data in constant terms.					
Note 2:	Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.					
Note 3:	Mobile e-commerce (goods) not included in non-store retailing total to avoid double counting as this category is already accounted for within e-commerce (goods).					

Table 62 Forecast Sales in Non-Store Retailing by Channel: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total
Direct Selling	Data removed from sample		
Homeshopping			
Vending			
E-Commerce (Goods)			
Non-Store Retailing			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note 1: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Note 2: Mobile e-commerce (goods) not included in non-store retailing total to avoid double counting as this category is already accounted for within e-commerce (goods).

Table 63 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026

	2021	2022	2023	2024	2025	2026
Value sales EUR million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms.

Table 64 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

% growth

	2021/22	2021-26 CAGR	2021/26 Total
Value sales EUR million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms.

Table 65 Forecast Sales in Grocery Retailers by Channel: Value 2021-2026

EUR million	2021	2022	2023	2024	2025	2026
-- Convenience Stores	Data removed from sample					
-- Discounters						
-- Forecourt Retailers						
-- Hypermarkets						
-- Supermarkets						
- Modern Grocery Retailers						
- Traditional Grocery Retailers						
Grocery Retailers						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms.

Table 66 Forecast Sales in Grocery Retailers by Channel: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total
-- Convenience Stores	Data removed from sample		
-- Discounters			
-- Forecourt Retailers			
-- Hypermarkets			
-- Supermarkets			
- Modern Grocery Retailers			
- Traditional Grocery Retailers			
Grocery Retailers			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms.

Table 67 Forecast Grocery Retailers Outlets by Channel: Units 2021-2026

outlet	2021	2022	2023	2024	2025	2026
-- Convenience Stores	Data removed from sample					
-- Discounters						
-- Forecourt Retailers						
-- Hypermarkets						
-- Supermarkets						
- Modern Grocery Retailers						
- Traditional Grocery Retailers						
Grocery Retailers						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 68 Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2021-2026

% unit growth	2021/22	2021-26 CAGR	2021/26 Total
-- Convenience Stores	Data removed from sample		
-- Discounters			
-- Forecourt Retailers			
-- Hypermarkets			
-- Supermarkets			
- Modern Grocery Retailers			
- Traditional Grocery Retailers			
Grocery Retailers			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 69 Non-Grocery Specialists Forecasts: Value Sales, Outlets and Selling Space
2021-2026

	2021	2022	2023	2024	2025	2026
Value sales EUR million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms.

Table 70 Non-Grocery Specialists Forecasts: Value Sales, Outlets and Selling Space: %
Growth 2021-2026

% growth	2021/22	2021-26 CAGR	2021/26 Total
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Value sales EUR million
Outlets
Selling Space '000 sq m

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms.

Table 71 Forecast Sales in Non-Grocery Specialists by Channel: Value 2021-2026

EUR million	2021	2022	2023	2024	2025	2026
- Apparel and Footwear Specialist Retailers	Data removed from sample					
- Electronics and Appliance Specialist Retailers						
- Health and Beauty Specialist Retailers						
- Home and Garden Specialist Retailers						
- Leisure and Personal Goods Specialist Retailers						
- Other Non-Grocery Specialists						
Non-Grocery Specialists						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms.

Table 72 Forecast Sales in Non-Grocery Specialists by Channel: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total
- Apparel and Footwear Specialist Retailers			
- Electronics and Appliance Specialist Retailers			
- Health and Beauty Specialist Retailers			
- Home and Garden Specialist Retailers			
- Leisure and Personal Goods Specialist Retailers			
- Other Non-Grocery Specialists			
Non-Grocery Specialists			
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources		

Table 73 Forecast Non-Grocery Specialists Outlets by Channel: Units 2021-2026

outlet	2021	2022	2023	2024	2025	2026
- Apparel and Footwear Specialist Retailers	<div>Data removed from sample</div>					
- Electronics and Appliance Specialist Retailers						
- Health and Beauty Specialist Retailers						
- Home and Garden Specialist Retailers						
- Leisure and Personal Goods Specialist Retailers						
- Other Non-Grocery Specialists						
Non-Grocery Specialists						
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources					

Table 74 Forecast Non-Grocery Specialists Outlets by Channel: % Unit Growth 2021-2026

% unit growth	2021/22	2021-26 CAGR	2021/26 Total
<ul style="list-style-type: none">- Apparel and Footwear Specialist Retailers- Electronics and Appliance Specialist Retailers- Health and Beauty Specialist Retailers- Home and Garden Specialist Retailers- Leisure and Personal Goods Specialist Retailers- Other Non-Grocery Specialists Non-Grocery Specialists	Data removed from sample		
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources			

Table 75 Mixed Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026

	2021	2022	2023	2024	2025	2026
Value sales EUR million	Data removed from sample					
Outlets						
Selling Space '000 sq m						
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources					
Note:	Forecast value data in constant terms					

Table 76 Mixed Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

% growth	2021/22	2021-26 CAGR	2021/26 Total
Value sales EUR million	Data removed from sample		
Outlets			
Selling Space '000 sq m			
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources		
Note:	Forecast value data in constant terms		

Table 77 Forecast Sales in Mixed Retailers by Channel: Value 2021-2026

EUR million	2021	2022	2023	2024	2025	2026
- Department Stores	Data removed from sample					
- Mass Merchandisers						
- Variety Stores						
- Warehouse Clubs						
Mixed Retailers						
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources					
Note:	Forecast value data in constant terms					

Table 78 Forecast Sales in Mixed Retailers by Channel: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax	2021/2022	2021-26 CAGR	2021/26 Total
- Department Stores	Data removed from sample		
- Mass Merchandisers			
- Variety Stores			
- Warehouse Clubs			
Mixed Retailers			
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources		
Note:	Forecast value data in constant terms.		

Table 79 Forecast Mixed Retailers Outlets by Channel: Units 2021-2026

outlet	2021	2022	2023	2024	2025	2026
- Department Stores - Mass Merchandisers - Variety Stores - Warehouse Clubs Mixed Retailers	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 80 Forecast Mixed Retailers Outlets by Channel: % Unit Growth 2021-2026

% unit growth	2021/22	2021-26 CAGR	2021/26 Total
- Department Stores - Mass Merchandisers - Variety Stores - Warehouse Clubs Mixed Retailers	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER

Forecast closing date: 17 January 2022

Report closing date: 9 February 2022

Analysis and data in this report consider consumer behaviour and market performance in 2021 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

Sources used during research include the following:

Summary 2 Research Sources

Official Sources

Trade Associations

Content removed from sample

Content removed from sample

Trade Press

Content removed from sample

Source: Euromonitor International