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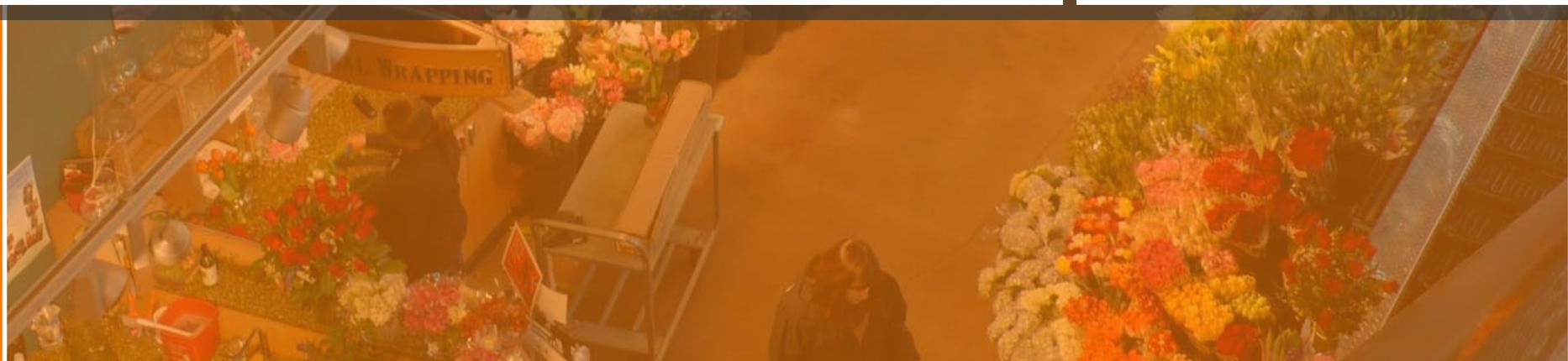
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## GLOBAL FRESH & CHILLED AND FOOD SERVICE

March 2016 - Masterclass & Report

ResearchFARM

Retail Analysts - [www.researchfarm.co.uk](http://www.researchfarm.co.uk)



## INTRODUCTION

All the focus in retailing is currently on digital, and for many retailers rightly so. But for a new breed of specialists it is actually the fresh and chilled ranges and food service options that drive shoppers back into grocery stores.

Grocers have an excellent opportunity to reinvent themselves and think creatively and innovatively about how to exploit the growing popularity in fresh food – driven by the mega trends towards health & wellness, local, artisanal brands, convenience, consumption on the go and so on.

Right now we are witnessing the next step of the evolution of the Whole Foods' concept such as Eataly's grocery store and restaurant hybrid and a number of lesser known innovators from across the globe profiled in the report.

However, adding more fresh food into the SKU mix raises new challenges, such as higher replenishment costs due to their perishable nature and emphasis to display products in artisanal ways to create a warm and natural in-store feel.

There is also pressure to ensure value for money despite higher costs, hire knowledgeable specialist staff and improve communication on the origin of products.

This report covers these opportunities and challenges in detail by studying grocery markets in ten selected countries.



# KEY LEARNINGS 1/2

1. A comprehensive understanding of the key grocery markets in Europe, North America and Australia.

2. Awareness of some of the most innovative players in fresh food - copy their innovative solutions and transpose into a new market environment

- In depth profiles on the grocery market structure of the USA, Canada, Australia and Belgium, France, Germany, the Netherlands, Italy, Spain and the UK.
- Data on total grocery market size, fresh categories size, and fresh as % of grocery.
- Sales per grocery channel (large stores, small stores and discounters) presented for each country.



# KEY LEARNINGS 2/2

3. Understand the new relationship between the fresh categories, specialist ambassadorial staff and shoppers, as well as supply chain integration

4. Gain insights into some of the unique challenges and characteristics of the grocery markets of the countries profiled.

- Grocery category sizes presented for each country. (Baked goods, Confectionery, Convenience, Dairy, Drinks (alcoholic & non-alcoholic), Dry grocery, Fresh, Frozen, Health & beauty, Household cleaning products, Impulse, Meat, fish, poultry & eggs, Other, Pet foods)
- Data on the number of stores, number of full-time employees and average sales per store type.
- Selected case studies on fresh food innovators in each country with pictures.
- Strategy section outlining fresh category opportunities and challenges.



## KEY QUESTIONS ANSWERED 1/3

1. Assess the growing importance of fresh categories for your client

2. Understand all the challenges involved for the retailers

3. How to include fresh food in your multiformat strategy

- Why have the fresh categories become so important for shoppers?
  - What are the main drivers apart from the health benefits?
  - Why have the discounters targeted fresh categories so much in recent years?
- 
- Why are the fresh categories so difficult for retailers to get right?
  - Why are some retailers better than others at efficiency in the fresh categories?
  - What are the specific challenges facing retailers in their respective country's grocery markets?
- 
- What are the fresh category challenges for hypermarkets and supercenters?
  - Are supermarkets still the most important channel when it comes to fresh categories?
  - What are the opportunities for the convenience channel?

## KEY QUESTIONS ANSWERED 2/3

4. How to sell fresh food online

5. How fresh food keeps you connected with the local environment

6. Deliver a better store experience with the right fresh food offer

- Who does fresh well online?
- Where has the crossover between fresh food, food service and online progressed furthest?
- In what ways is fresh food linked to the local trend?
- In what way does fresh fit into the artisanal movement, tying in millennial and hipster shoppers?
- How has fresh transformed the in-store shopping experience?
- Which grocers have particularly sought to incorporate food service elements with traditional grocery?
- Which country and retailer sets the global benchmark on retail theatre in the fresh categories?

## KEY QUESTIONS ANSWERED 3/3

7. Discover the best practices around the word

8. Review case studies of the leading retailers

- In which country have ethnic stores become an increasingly important channel?
- How are the French hypermarkets reacting to the rise of fresh?
- What global themes can be identified?
  
- What values make Canada's Farm Boy so popular with shoppers?
- Why does Australia's grocery market offer the perfect test conditions for Aldi's Project Fresh and innovative specialist About Life?
- What are the unique selling points of Germany's Veganz and Kochhaus? Will the vegan trend travel into the USA?
- In what ways is Italian chain Eataly pushing the boundaries in food retailing and food services? How does the retailer internationalise?
- Were Dutch players such as Jumbo or Landmarkt the first to break the mould? How are they revolutionising the large store shopping experience and how important is fresh in the mix?

# COMPANIES INCLUDED

7-Eleven, About Life, Agorà, AH XL, Ahold, Albert Heijn, Alcampo, Aldi, Amazon, Asda, Aspiag, Auchan, BiLo, Box by No Frills, Carrefour, Casino, Circle K, City Convenience, Coles, Coles Express, Colruyt, Conad, Condis, Consum Cooperativa, Coop, Cora, Costco, Couche-Tard, Crai, Cru, Delhaize, Dia, Disco Verde, E.Leclerc, Eataly, Ecomarché, Edeka, El Corte Ingles, Emté, Eroski, Esselunga, Farm Boy, Finiper, First Choice Liquor, Foodland, Franprix, Globus, Grand Frais, Harris Teeter, HEB, Hipercor, IGA, Intermarché, Jumbo Foodmarkt, Kaufland, Kochhaus, Kroger, Landmarkt Amsterdam, Leaderprice, Lidl, Liquorland, Loblaw, Londis, M&S, Mac's, Main & Vine, Meijer, Mercadona, Metcash, Metro Group, Metro, Morrisons, Netto, Norma, Okay, Ooshop, Overwaitea, Penny, PLUS, Profi, Proxy Delhaize, Publix, Real, REWE, Red Market, Safeway, Sainsbury's, Sam's Club, Schwarz Gruppe, Selex, Shoppers Drug Mart, Sigma, Simply Market, Sisa, Sli-gro, Smatch, Sobeys, Spar, Sperwer, Sprouts, Sun, Supercor, SuperSano, Système U, T&T, Target, Tesco, The Fresh Market, Trader Joe's, Unicoop Firenze, Veganz, Veritas, Vintage Cellars, Vomar, Waitrose, Walmart, Wegman's, Whole Foods, Woolworths



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