

Key insights from the State of Grocery report 2022

France



French grocery retail facts



The French market saw a decline in overall sales in 2021 but is still higher than pre-COVID levels

Consumers increasingly looking for ways to save money and focusing on health & sustainability

Consumer Survey sentiments¹



Price

Consumers net intent to...

↑ Look for ways to save money

↑ Actively search for promos

Health and sustainability

↑ Focus on healthy eating and nutrition

Pay a higher price to get environmental-friendlier products

Net intent 2022 (delta vs.2021)

	France			EU
	Overall	High income	Low income	
Look for ways to save money	+43% (+10 p.p.)	+32%	+52%	+42% (+9 p.p.)
Actively search for promos	+33% (+6 p.p.)	+24%	+41%	+28% (+1 p.p.)
Focus on healthy eating and nutrition	+38% (+7 p.p.)	+42%	+31%	+34% (+4 p.p.)
Pay a higher price to get environmental-friendlier products	+8% (n/a)	+21%	-2%	+2% (n/a)

Market KPIs²



↓ Overall sales decreased by -2.2% year-on-year in 2021, while still being 5.3% above 2019 levels. The decline was mostly driven by volume loss (-3.2%) while inflation is only partially aiding recovery (+0.6%)

↑ Online retail revenue increased +3.7% year-on-year in 2021, and is the only channel experiencing growth; in contrast, sales in supermarkets decreased by 4.5%

↑ The Foodservices market rebounded +10.5% year-on-year in 2021, while still being 25.1% lower than 2019 levels

1. Net sentiment computed by deducting % of people intending to do less activity in 2022 vs. 2021 from % of people intending to do more activity & European countries surveyed: CH, DE, ES, FR, IT, NL, PL, SE, UK

2. 2021 figures vs. 2020 and 2021 figures vs. 2019