

What Does Digital Grocery Look Like in the EU-5?

Article

In 2018, the UK led digital grocery buying in the EU-5 (France, Germany, Italy, Spain and the UK) with 32% of internet users indicating they purchased groceries digitally in the prior year. Germany ranked second with 23%.

Digital Grocery Buyer Penetration in EU-5, 2014-2018

% of internet users

	2014	2015	2016	2017	2018
UK	27%	29%	30%	29%	32%
Germany	12%	13%	21%	23%	23%
France	13%	11%	16%	16%	17%
Spain	7%	7%	8%	10%	12%
Italy	2%	2%	3%	4%	6%

Note: ages 16-74 who used the internet within the last year

Source: Eurostat, "ICT Usage in Households and by Individuals 2018," Dec 20, 2018

244382

www.eMarketer.com

But what's going on behind the numbers? Let's look more closely at digital grocery across the region.

In September 2018, Comscore found that the UK was still outperforming the rest of the EU-5 countries with respect to unique visitor numbers and time spent on retail food sites. Roughly 32 million people—approximately half the UK population—had been to a site selling groceries and food or beverages and spent an average of 28 minutes there. (It's important to note that these figures were likely boosted by digital takeout, as the UK was a pioneer in this sector.)

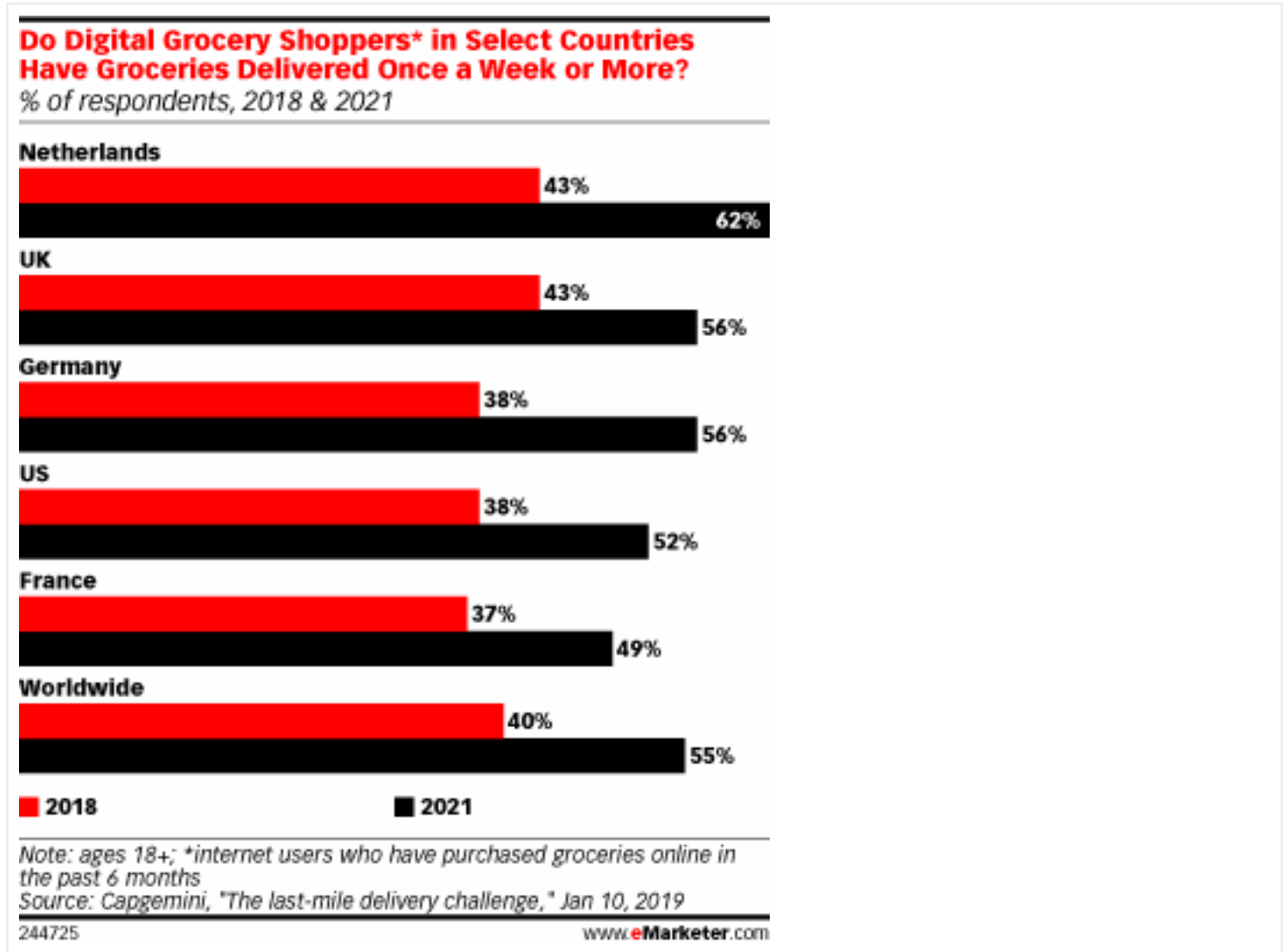
In Germany, more than half of survey respondents said they hadn't purchased groceries online because they either "preferred to buy in store," or they "preferred to be able to pick up products," according to a December 2018 survey from Gesellschaft für integrierte Kommunikationsforschung (GIK). Nearly one-fourth of respondents felt that delivery was too expensive, and one-fifth said that online groceries were not as fresh as those purchased in-store.

Similarly, in Italy, the online food market has lagged behind likely due to the emphasis placed on cooking and eating fresh produce. Only 7% of internet users in Italy bought fresh food on the web in 2018. However, slightly more purchased alcoholic drinks (16%), packaged foods (18%) and pet food (21%), according to the Nielsen Global Commerce Study.

In Spain, only 17% of respondents who bought food online said that was their preferred way to buy groceries, according to a July 2018 release from The Cocktail Analysis. What's more,

growth in digital grocery purchases increased just 1% over 2017 to 39%, according to a December 2018 report from El Observatorio Cetelem.

But digital grocery purchases in the EU are on the rise. More than one-third of digital grocery shoppers in the Netherlands, the UK, Germany, and France had groceries delivered at least once a week in 2018, according to a January 2019 survey from Capgemini.



By 2021, more than half of digital grocery shoppers in the Netherlands, the UK and Germany will have groceries delivered weekly, as will 49% of respondents in France.