

# ONLINE GROCERY RETAILING – GERMANY – 2024

With consumer attention shifting to convenience as financial pressures ease, there are significant growth opportunities within the online grocery sector.



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# Online Grocery Retailing – Germany – 2024

## This report looks at the following areas:

- The short-, medium- and long-term development of the German online grocery retailing market
- How consumers shop for groceries online, with online grocery shopping's popularity coming from the added convenience compared to traditional in-store shopping
- How consumers typically receive their groceries, including the growing importance of convenience
- Retailers used for online grocery shopping, with Rewe dominant in the online grocery market
- Products typically bought when shopping for groceries online, with consumers preferring to purchase non-perishable items
- Factors that encourage consumers to shop with one grocery retailer over another, with an expansion of product categories and brands being key for online grocery success
- Consumer perception of online grocery shopping, highlighting existing concerns about quality



With consumer attention shifting to convenience as financial pressures ease, there are significant growth opportunities within the online grocery sector.

## Overview

24% of German online grocery shoppers believe that shopping online for groceries helps them save money. Despite the general perception that online grocery shopping leads to extra costs, such as delivery fees, and is therefore more expensive, retailers can **attract price-**

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**conscious consumers by emphasising the convenience and budgeting benefits of shopping online.**

The faster financial recovery of higher earners, who are the primary demographic for online shopping, is sustaining demand and will increase focus on convenience. A broader financial recovery is expected to empower consumers, making them more inclined to invest in convenience for relief from their busy schedules.

However, 2024 will still be a challenging year. As such, **convincing consumers of the added value of online grocery shopping** is crucial. Especially given the prevailing concerns over receiving lower-quality items, reinforcing consumers' reluctance towards online grocery shopping.

The share of online grocery shoppers has been gradually increasing, indicating a growth trend if retailers can expand market share by **addressing consumers' financial and quality concerns**. Modern loyalty schemes, including **AI-driven meal planning, will boost loyalty and integrate into daily routines** by catering to consumers' demand for personalisation.

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# Report Content

## EXECUTIVE SUMMARY

- The five year outlook for online grocery retailing

### Market context

- Financial strains and return to in-store shopping reduces e-commerce, but online grocery retailing proves more resilient
  - Graph 1: annual growth of turnover of goods in ecommerce, 2021-23
- High grocery costs strain German budgets, prompting selective buying
  - Graph 2: changes in the consumer price and food price index, compared to the previous year month, 2023-24
- High grocery costs strain German budgets, prompting selective buying

### Mintel predicts

- Online grocery shopping poised for growth amid eased financial pressures and improved shopping experiences
- Retailers can grow by responding to the increasing need for flexibility and convenience

### Opportunities

- Tap into increasing responsibility for grocery shopping among men
  - Graph 3: online grocery shoppers, NET, by gender and age, 2024
- Broaden product offerings to enable comprehensive online shopping
- Elevate online grocery shopping with customised food concepts
- Address quality concerns to eliminate consumer fears and foster positive experiences
  - Graph 4: associations with online grocery shopping, by online grocery shoppers and those who have never shopped for groceries online, 2024

### The competitive landscape

- Rewe leads the traditional online grocery market

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### The German economy

- 2024 is expected to remain challenging
  - Graph 5: key economic data, in real terms, 2019-25
- The inflation rate is bouncing back to more conventional levels
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and expenditure
  - Graph 6: financial confidence index, 2022-24
- High grocery prices continue to put pressure on German budgets...

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- Graph 7: changes in the consumer price and food price index, compared to the previous year month, 2022-24
- ...and drive selective shopping habits

## Development of online retailing

- eCommerce sales decline post-pandemic but online grocery proves more resilient
- Graph 8: annual growth of turnover of goods in ecommerce, 2021-23

## Convenience as a driver of choice

- Convenience continues to impact daily life tasks, with a focus on more flexibility

## Consumer spending on food

- Consumer spending on food and drink continues to rise
- Graph 9: consumer spending on groceries, beverages and tobacco products, incl. VAT, 2018-23

## AI and personalisation

- Artificial intelligence can elevate the in-app experience of online grocery retailers
- Leverage AI to deliver a more personalised online grocery experience

## MARKET ACTIVITY

### Market size and forecast

- After years of growth, online grocery experienced its first sales decline
- Graph 10: online grocery retail sales, 2018-24
- Online grocery sector will remain stable in 2024
- The online grocery sector is set to grow
- The future of online grocery is uncertain but further development of supply can drive consumer interest

### Market segmentation

- The German online grocery market is fragmented
- The exit of Getir and Gorillas from Germany gives Flink the market leadership in quick-delivery...
- Rapid delivery face challenges in scaling the business, but opportunities remain

## WHAT CONSUMERS WANT AND WHY

### Who shops online for groceries

- Target the untapped potential of online grocery shopping
- Graph 11: use of online shopping, NET, 2024
- Persistent increase in German online grocery shoppers with minimal drop-offs
- Graph 12: use of online shopping, NET, 2021-24
- Online grocery shopping is popular as an additional convenience...
- ... but the online share of grocery shopping is growing

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- Graph 13: online grocery shopping behaviour, 2023-24
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- Address financial barriers to online grocery shopping
  - Graph 14: use of online shopping, by net monthly household income, 2024
- Men's rising responsibility for grocery shopping drives online channel
  - Graph 15: online grocery shoppers, NET, by gender and age, 2024
- Online grocery shopping is a popular choice for busy families...
- ...but retailers must not overlook the demand from growing single households

## How consumers receive their groceries

- Increase coverage with more flexible delivery options
- Click-and-collect offers flexibility to shoppers and upselling opportunities to retailers

## Retailers used for online grocery shopping

- Traditional supermarkets are most popular to shop with online
  - Graph 16: retailers typically used for online grocery shopping, 2024
- Cater to fast, small-basket delivery demands by offering it as a premium service
  - Graph 17: consumers who shopped with rapid delivery services, by age, 2022-24
- Integrating seamless online and offline experiences for Germany's loyal online shoppers
  - Graph 18: repertoire analysis of retailers used for online grocery shopping, 2024
- Tap into the diverse needs of families
- Enhance appeal of subscription recipe boxes as economical dining alternatives

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- German online grocery shoppers prioritise cupboard items and non-perishables
  - Graph 19: types of products typically bought when shopping for groceries online, 2024
- Overcoming the hurdles of online fresh food shopping outside of big cities
- Leverage special bundle offers to diversify shopping baskets
  - Graph 20: repertoire analysis of types of products typically bought when shopping for groceries online, 2024

## Preferences when shopping for groceries online

- German online grocery shoppers seek diversity, avoiding inconvenience when switching between online retailers
- Expand product ranges to facilitate online one-stop shopping
- Choice and flexibility fuel online grocery shopping
- Leverage premium, ultra-fast delivery services to attract higher-income shoppers
- Capitalise on modernised loyalty schemes to boost the share of online grocery shoppers
  - Graph 21: factors that encourage consumers to shop with one grocery retailer over another, by shopping behaviour, 2024
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- Concerns about quality limit online grocery shopping
  - Graph 22: consumer perception of online grocery shopping, 2024
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  - Graph 23: top five associations with online grocery shopping, by consumers who have never shopped for groceries online, but would like to, 2023
- The convenience of online grocery shopping is particularly appealing to Germans aged 16-44 and to high earners
  - Graph 24: "Online grocery shopping simplifies everyday life", by net monthly household income, 2024
  - Graph 25: "Online grocery shopping simplifies everyday life", by age, 2024
- Reduce financial barriers that keep consumers from discovering the convenience of online services
- flaschenpost highlights the importance of valuing consumers' free time
- Underpin how online shopping can support budgeting
- Connect with seniors in person to showcase the benefits of shopping online
- Cater to younger shoppers with a more social and personal shopping experience

## RETAILER ACTIVITY

### Leading retailer

- Rewe's online service champions flexibility
- Picnic broadens its scope with new territories and product categories
- Flink relies on app partners to increase reach
- HelloFresh experiences margin pressure, and engages young audiences with influencer marketing

### Retail innovation

- Rewe introduces weekly free delivery day
- Aldi starts test phase of delivery service in the Ruhr area
- Rewe is diligently pursuing innovations in online groceries and testing autonomous deliveries
- The testing phase for Rewes' autonomous shopping baskets begins in Hamburg

## APPENDIX

### Appendix – abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

## **Appendix – TURF analysis methodology**

- TURF analysis methodology

## **Appendix – repertoire analysis methodology**

- Repertoire analysis methodology

## **Appendix – market size and forecast**

- Forecast methodology
- Forecast methodology – fan chart
- Market size – value
- Market forecast and prediction intervals – value



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