



The future of European groceries:

6 trends defining the evolution of grocery retail



TREND·WATCHING





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Executive summary

In Europe, online grocery shopping has become the new normal, but this meteoric growth shows no signs of slowing, and is projected to reach 66% by 2023.¹



82%
of Europeans
shop online for
their groceries²



66%
Growth in online
grocery shopping
throughout Europe¹

In a 2021 survey carried out by PayPal, 82% of European respondents shopped online for their groceries,² and the majority plan to continue after the pandemic.³ Grocers across the continent were quick to pivot, but in 2022, it's no longer enough to set up webstores and call it a day.

To truly succeed in the online grocery retail boom, businesses need to keep their fingers on the pulse and successfully predict which shoppers' needs will stay, go, return or evolve. It is also critical that businesses innovate and stay at least one step ahead of the competition. Looking outside the grocery industry and adopting learning and best

practices from the wider e-commerce market may be the way to retain and grow your customer base amidst intense competition.

PayPal has teamed up with TrendWatching, one of the world's leading consumer trend firms, to identify the trends shaping the future of grocery shopping and food delivery. These insights, along with data sourced from proprietary PayPal research and expert interviews, offer signposts for your business to navigate this all-new, dynamic grocery retail terrain.



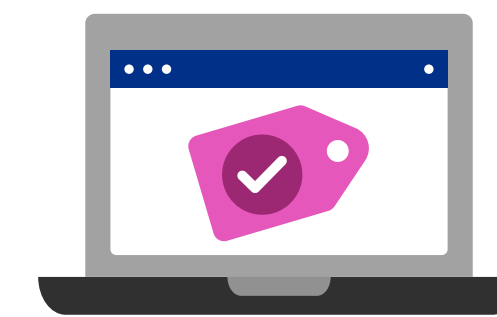
To truly succeed in the online grocery retail boom, businesses need to keep their fingers on the pulse.



6 trends defining the future of grocery retail

The online grocery revolution isn't slowing anytime soon. In fact, the market will continue to shift as businesses diversify their offerings, and pivot to stay ahead of consumer expectations.

We've analysed the market to bring you 6 trends that will shape the future of grocery retail. Each is a window of opportunity for your business to set itself apart in the crowded European marketplace; and provides a direct route to new and loyal shoppers that have the potential to drive your brand's success.



Personalised shopping experiences with AI



Bridging the gap between online and in-store retail



Enhanced convenience



Easier eco-friendly choices



Store-to-door retail



Speeding up in-store shopping

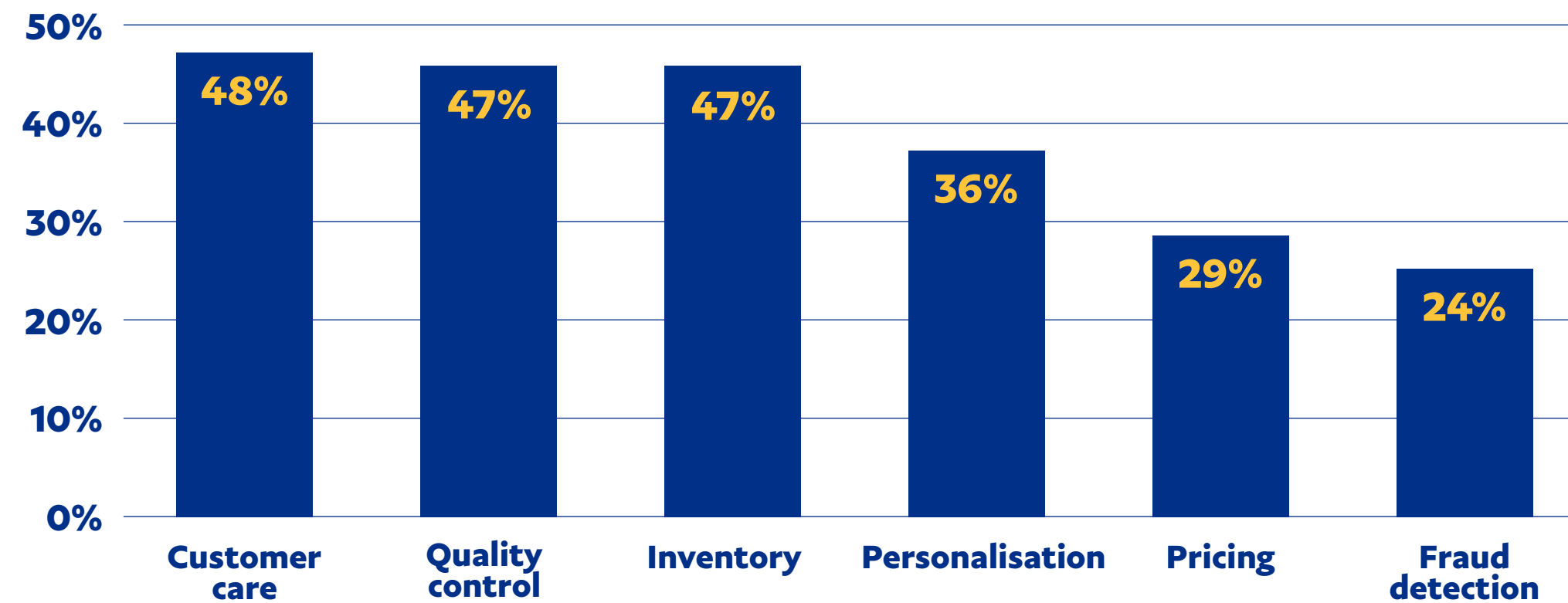
Retailers
with leading
technology
capabilities
outperform
others by 19%⁷



Personalised shopping experiences with AI

Artificial intelligence (AI) is the next frontier for global e-commerce, and COVID-19 has accelerated its adoption. 52% of businesses scrambled to implement their AI strategies to try and seize a competitive advantage.⁶ These frontrunners in the AI race are pioneering innovative consumer experiences and improved services, reaping healthy revenue returns.

Top AI uses in retail⁸



While 50% of enterprises are familiar with the benefits of using AI for customer care and inventory management, only 36% have explored AI's ability to personalise the shopping experience.⁸ For grocers, this is a golden opportunity.

Three-fifths of grocery shoppers say personalisation is important.⁹ They're familiar with online algorithms recommending products and promotions tailored to their needs. Grocers seeking to differentiate themselves must use AI to truly innovate. The next frontier of personalised shopping is one where every step of the consumer journey is convenient and individually tailored.



How the industry is innovating

1. Automated weekly grocery shopping trips

Consumers demand convenience. 62% of Europeans believe shopping for groceries online saves time² as they don't have to travel to stores or wait in queues.



Italian supermarket chain Basko has doubled down on this convenience with EuGenio,¹⁰ a subscription service that automates routine grocery trips.

Using a Google Cloud algorithm, EuGenio prepares a weekly shopping basket based on consumers' purchase history and delivers it to their home.

To further enhance this experience, subscribers can rate their basket after delivery so EuGenio can improve product selections for their next order.

2. Using AI to help shoppers make substitutions

30% of consumers feel that encountering out-of-stock notices on the products they want detracts from their overall shopping experience.¹¹ 1 in 5 disappointed shoppers will turn to other stores to find the same product, impacting revenue.¹¹

This, along with how 66% of Europeans will browse multiple grocery providers for the best deal,² means grocers must innovate to maintain their inventory and reduce consumer dissatisfaction. This is where AI comes in.



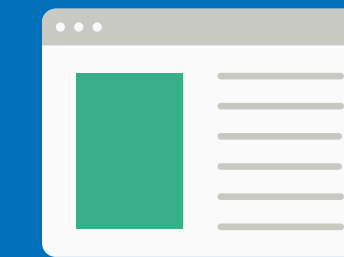
In 2021, Walmart¹² built an AI system that recommends substitutions for out-of-stock products based on the shopper's preferences, plus hundreds of other variables.

Using deep learning, the system records the shopper's responses to replacement products to improve future suggestions

Consumer acceptance of these substitutions rose 95%,¹² proving that shoppers are willing to swap to different brands if the alternative is easy and comparable.

3. Apps that simplify sustainable shopping

Food waste concerns are top-of-mind for conscious European consumers.¹³



Nosh, an AI-enabled app, helps shoppers reduce food waste with ease. Consumers can log and colour code expiration dates of groceries and get reminders when the dates are approaching.

The app also suggests recipes and creates weekly reports to improve the consumer's consumption habits.¹⁴

Key takeaways:



- Consumers want convenient, personalised experiences
- AI can create shopping services that also offer lifestyle benefits
- Deep-learning algorithms can boost shoppers' acceptance of new products and improve overall consumer satisfaction with substitutions

95%

of consumers who have shopped for groceries online have also made an in-store grocery purchase within the same three months¹⁵



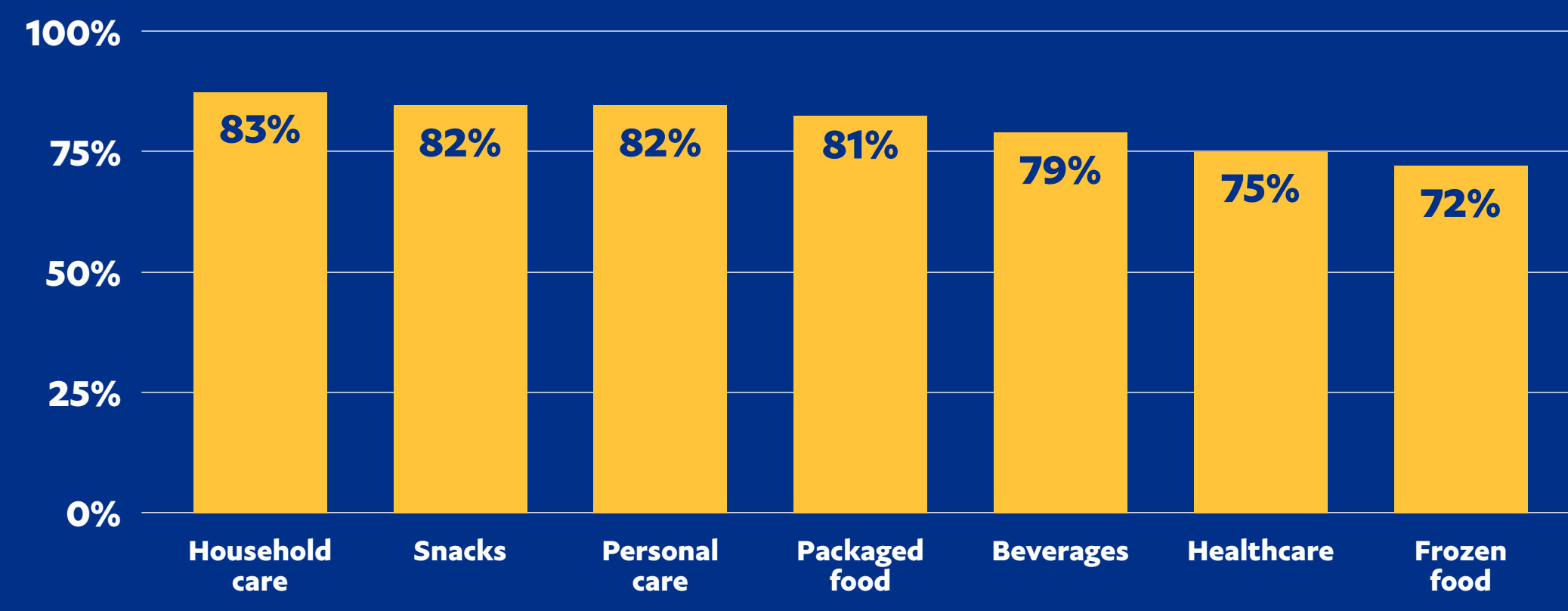


Bridging the gap between online and in-store retail

50% of Europeans will continue to shop both in-stores and online well into the future¹³ as each retail avenue serves different consumer demands.

For example, 90% of Europeans prefer to see and touch fresh foods before they buy,² leading to more shoppers purchasing fruits, vegetables, and meat in-stores or with click and collect. Home delivery is still preferred for bulkier items,¹⁶ like household and personal care products, snacks, beverages, frozen and packaged foods.

Grocery categories consumers prefer to purchase online¹⁶



This omnichannel approach to grocery shopping will continue to expand, and grocers that provide the best of online and physical retail as one integrated package are leading the way.

Hybridizing the consumer journey on websites or store aisles isn't enough. Now that livestream shopping, AR try-on tools and other virtual innovations are becoming mainstream, 90% of decision-making and product discovery is done before the shopper even enters the store.¹⁷ It's time to create grocery shopping experiences that bring physical retail to consumers' social media feeds and search engines.

How the industry is innovating

1. Shoppable cooking videos

77% of Europeans are concerned they may not get the freshest produce when they shop online,² but this doesn't mean their fresh food shopping is void of digital influence. Nearly 4 in 10 Europeans are now spending more time cooking at home,¹⁸ and they're finding new cuisines to explore and recipes to experiment with online. This culinary journey eventually influences the products they put in their shopping baskets.



To capture consumers who are on this journey, US-based grocers Albertsons partnered with short-form video platform Firework to create live, shoppable cooking videos.

The retailers say the videos are 'capable of digitally recreating the sense of freshness, discovery, and community'¹⁹ that shoppers enjoy when buying fresh food in stores.

This format could, in turn, improve shoppers' trust in the quality of fresh food they will receive when shopping online, while the recipes they view inspire their cooking at home.

With 70% of Europeans interested in live shopping events,²⁰ retailers with quick, fuss-free online payment methods like PayPal integrated into their streaming platforms can capitalise on this trend and may see a significant uptick in conversions.

2. All-rounded lifestyle apps

Research discovered that the pandemic motivated more Dutch consumers to live healthier lifestyles.²⁵



Local supermarket Albert Heijn is encouraging these habits with its comprehensive FoodFirst Lifestyle Coach.

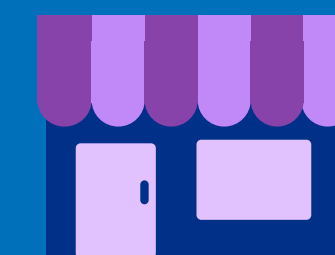
The free app offers daily, tailored advice and health challenges, exercise videos and meditation schedules, all developed with doctors, dieticians and behavioural scientists.²⁶

3. Virtual concierges

Finding the space for a human connection remains a big challenge for retailers when bridging the online-physical shopping divide.

In 2017, over half of all Europeans were getting advice on products by speaking to retail associates.²¹ However, recent years saw a 15% rise in mobile search queries about brands and products taking place in-store.²² Savvy shoppers are now moving online to learn about products as they shop—a behaviour most prevalent among conscious consumers.²³

What's more, 66% of Europeans tend to choose products that are sustainably sourced and environmentally friendly.²



Italian supermarket chain Conad Centro Nord plans to help these conscious consumers get product information in real-time with the help of an interactive virtual assistant that answers shoppers' enquiries, akin to human retail associates.

Shoppers simply scan QR codes on product packaging to ask the AR assistant questions or learn more about the brand's supply chain.²⁴

Key takeaways:



- Shoppers will continue to shop both in-store and online
- Consumers prefer shopping experiences that align with their interests and values
- Virtual innovations with elements of human connection can engage new and existing shoppers, even before they demonstrate intent to purchase

53%
of Europeans
believe it is very
important to shop
from a retailer
with services that
simplify their lives²³





Enhanced convenience

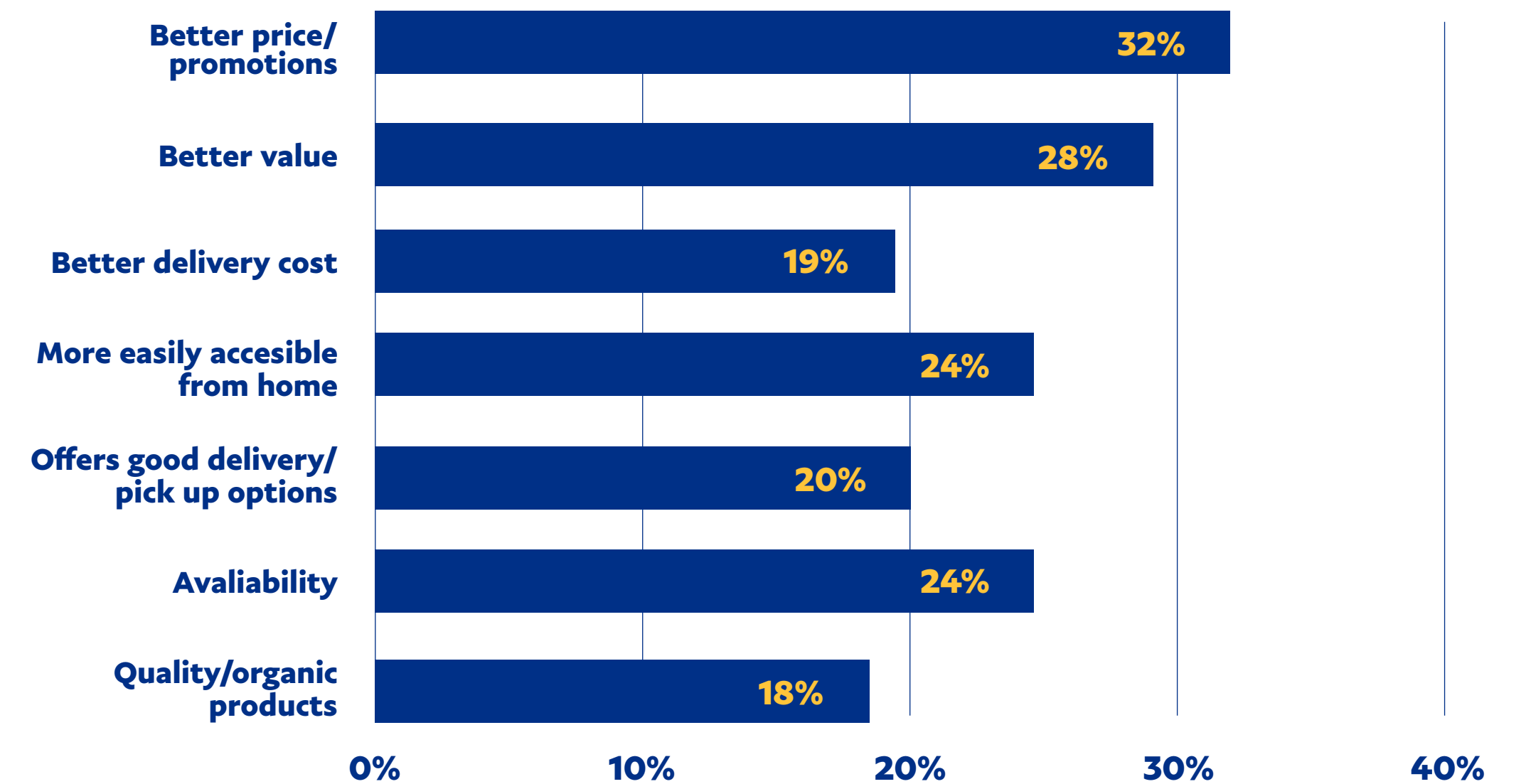
Convenience is the main reason Europeans are shopping for groceries online. They enjoy the time this saves, using home delivery to avoid travelling to stores, or opting for click and collect when it better suits their needs.

As the market matures, consumers will become accustomed to this convenience and expect it as the norm. Retailers should differentiate themselves from the competition with add-on services that further enhance the level of convenience that shoppers seek.

In 2020, 6 in 10 Europeans adopted new shopping behaviours²⁷ that aligned with their demands. Consumers are now more inclined to shop with grocers or try third-party apps that offer time and cost savings, healthy and sustainable choices, reliable delivery options, or all of the above. It boils down to one thing: shoppers gravitate towards retailers with services that simplify their lives.

Grocers that step in to meet these needs may enjoy revenue gains along with increased shopper loyalty. Indeed, 75% of Europeans are willing to pay a premium²³ for enhanced convenience.

Reasons consumers have changed their shopping behaviour²⁷



How the industry is innovating

1. Partnerships with smart shopping apps

With Europeans spending more time in the kitchen, and 40% prioritising healthy food choices,² retailers are turning recipe discovery and grocery shopping into one simplified, automated experience.



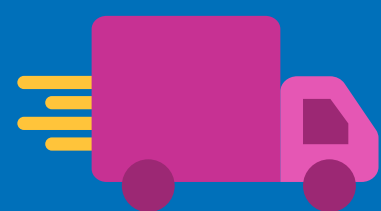
UK-based AI shopping assistant Lollipop is making manual grocery lists a thing of the past.

With Lollipop, consumers can create meal plans from a database of recipes or the BBC Good Food website, and the AI assistant automatically adds the ingredients to their shopping basket.

Apart from fresh food, consumers can also add other household essentials to their basket before checkout. The products and delivery are all fulfilled by Lollipop's grocery partner, Sainsbury's.²⁸

2. Complimentary add-ons

86% of Europeans avoid online grocery retail because in-store shopping jogs their memory for products they need.²



Delivery provider DoorDash launched DoubleDash in the US, a service that allows shoppers to add items from nearby stores to their original orders with no additional delivery fee, and no minimum order threshold.³⁰

This convenient add-on appeals to shoppers deterred by high delivery fees.

3. Simplifying click and collect with third-party networks

PayPal research found high delivery fees (68%) and a lack of same or next-day delivery options (46%)² to be the leading complaints about the grocery delivery landscape across Europe. However, the issue goes both ways, as certain grocers struggle with cheap and immediate delivery with warehouses located outside city centers. The world's first fully automated e-grocery pickup network, Delipop, aims to solve both these problems.²⁹



Delipop levels up the click and collect experience for both shoppers and retailers.

Delipop stores are centralised locations for shoppers to pick up their orders from multiple supermarkets, with collection slots available 24/7. Consumers are notified when their orders are ready at the Delipop store near them, and they can retrieve their groceries from designated lockers using a QR code.²⁹

Beyond soothing logistical pain points for retailers and making grocery pickup easier for shoppers, Delipop also gives partner retailers more visibility at a time when almost 50% of Europeans use apps or websites that give them access to multiple grocery stores.²

Key takeaways:



- European shoppers are more likely to shop with brands that simplify their lives
- Explore third-party services to create next-level, frictionless shopping experiences

81%

of Europeans value
quick and easy
checkout above all
other aspects of
a shopping
experience³¹



Speeding up in-store shopping

The e-commerce boom has dramatically transformed the average consumer's definition of "quick and easy", especially when it comes to store navigation, checkouts and payments. As hybrid shopping habits become widespread, consumers will transfer these expectations into physical grocery stores too.

In the past year, 59% of online shoppers across Europe used online payment platforms like PayPal more than ever before, surpassing debit and credit card transactions in countries like the Netherlands, Poland, Portugal, Belgium, and Germany.² This preference is trickling down to in-person shopping, as 6 in 10 buyers prefer making in-store purchases with digital or contactless payments.³²

The value of digital payments in Europe is projected to reach \$1.95T in 2025.³³ Embracing online and mobile transactions with e-wallets like PayPal are a necessary step for grocers to stay relevant.

But this is just the beginning. Grocery giants are pushing boundaries with technology that enables shoppers to navigate stores with ease and checkout as they go, bringing the speed of online purchasing to brick-and-mortar stores. The future of in-person grocery shopping could be rid of queues, and self-service from end-to-end.

Consumer reactions to friction at checkout

3 in 4
shoppers will³⁴

abandon their purchase if they have to queue for more than 5 minutes.

shop in a competitor's store if they perceive the queue time to be quicker.

3 in 5
shoppers will³⁵

use self-checkout to avoid a slow checkout experience.



How the industry is innovating

1. Cashier-less shopping

European consumers are eager to explore cashier-less grocery shopping: over half say that self-checkouts are an incentive to shop with a retailer,³¹ and 2 in 3 prefer to use contactless payments when buying in-stores.³⁶



In 2020, Amazon launched its Just Walk Out technology, a milestone in checkout-free shopping.

With Just Walk Out, shoppers can go into a store, scan a QR code, fill their shopping baskets, and leave without having to pay at a cashier or self-checkout machine. Instead, the bill is deducted online from the preferred payment method stored in the shopper's Amazon account.³⁷ Just Walk Out is currently available at Amazon Fresh supermarkets, and Sainsbury's in London.³⁸

Seamless Shopping by Trigo is another similar checkout-as-you-go technology that has been adopted by European grocers like REWE, Tesco, and Netto.³⁹

2. Smart shopping baskets

67% of self-checkout users in Europe are keen to see digital payment options in grocery stores evolve further⁴⁰. Smart retail devices could offer a technological leap forward, especially for consumers that still prefer to transact in-stores.



AI startup Mo-ka has invented smart shopping baskets that are currently on trial at an Intermarché store in Paris.⁴¹

These baskets combine the already-prevalent self-scanning technology found in French supermarkets⁴² with a consumer experience similar to Amazon's Just Walk Out.

When a shopper picks an item and puts it in their basket, cameras embedded in the handles detect the item. The basket then syncs with a mobile app to record the shopper's purchases. When they're done, they can either pay with the app, or at self-checkout stations that automatically total the smart basket's contents.⁴¹

3. AR-enabled shopping lists and store navigation

1 in 10 Europeans rely on mobile shopping lists at the supermarket. While shopping, a third also regularly use their smartphones to find information, whether to learn more about the product they're buying, find better deals, or locate the store's directory.⁴³



Dent Reality recently raised \$3.4M to bring augmented reality (AR) into grocery stores, with the goal of making a grocery trip more efficient.

Shoppers build their own shopping list using the app, then navigate to each item with AR-enabled directions. The startup has tested the technology at a Marks & Spencer branch in London.⁴⁴

PayPal's online payment solutions can help grocers elevate their cashier-less retail experience and streamline consumer adoption of this new approach to shopping. 54% of shoppers are more willing to buy when a business accepts PayPal, especially in unfamiliar situations.⁴⁵

Key takeaways:



- Consumers will expect in-store navigation to be as seamless as their online counterparts
- Online payment offerings in-store can reduce friction at checkout
- More European grocers are introducing cashier-less shopping experiences with innovative retail and payment technologies

9 in 10 shoppers
believe grocery businesses
can play a key role in
helping them make
sustainable choices⁴⁶





Easier eco-friendly choices

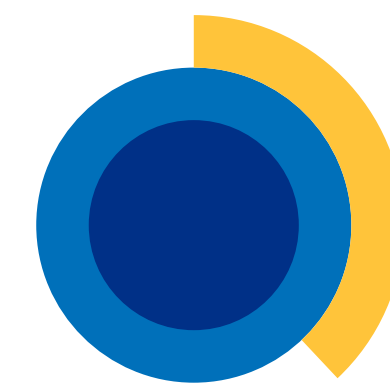
Grocery shoppers have never been more value-driven. Between 2019 and 2020, global Google searches for 'ethical online shopping' increased 600% year-on-year,⁴⁷ and these sustainability concerns are influencing in-store shopping choices too.

Globally, 76% of shoppers say they will switch to a retailer that understands how important sustainability is to them.¹³ A third of shoppers are choosing 'greener' products, even if they cost a little more.⁴⁸

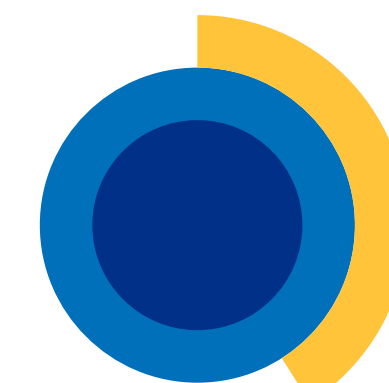
Across Europe, PayPal data unveiled that 66% prefer to shop with grocers that offer eco-friendly and sustainable options.² 57% also prefer to shop with apps or websites that supported stores in their neighbourhood.²

However, the preference for convenience can get in the way of these good intentions. The average grocery trip in Europe takes anywhere between 17 to 35 minutes⁴⁹—not every shopper has the luxury of time to read and research every product label they see. Grocers that make it easy for shoppers to identify and buy eco-friendly or local produce stand to win favor.

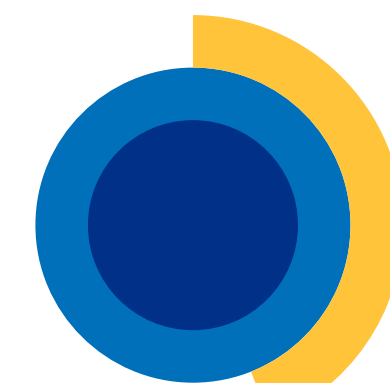
Top sustainability concerns for consumers¹³



38%
want grocers to
reduce food waste



41%
want grocers to
reduce or remove
plastic packaging



44%
are more enticed by retailers
that reduce supply chain
emissions with a focus on
local produce

How the industry is innovating

1. Eco-friendly product scoring systems

Determining whether a brand is legitimately ethical and sustainable takes a lot of research. Some retailers are doing the legwork for shoppers with scoring systems that visibly spotlight how eco-friendly a product is.



In the UK, online marketplace Dayrize has started labelling products with a 'Dayrize Score'.

An algorithm examines each brand's environmental and community impact and assigns a score of up to 100 points. Scores accompany each product's listing across the site. The higher the number, the more sustainable the product.⁵⁰

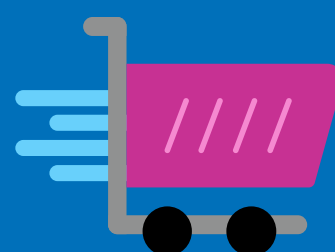


Global meal kit provider HelloFresh has implemented a climate labelling scheme that will roll out across Europe in 2022.

Shoppers can easily spot which products generate the least CO2 emissions, and 'Climate Hero' tags accompany the platform's least carbon-intensive recipes for the week.⁵¹

2. Collaborating with local agricultural cooperatives

In the UK, 83% of shoppers are more likely to buy from a brand that supports and sources from local suppliers.⁵² Grocers that showcase local products visibly across their shop shelves could entice consumers who want to support local, and shop more sustainably.



Spanish grocer Caprabo is meeting this need with a new initiative that supports local farmers.

They're working with Catalan agricultural cooperatives to ensure 10% of their supermarket shelves are stocked with locally grown produce. Up to 300 products by native farmers are now available at Caprabo stores.⁵³

3. Digital farmer's markets

57% of Europeans prefer to shop on apps or websites that support their neighbourhood. Coupled with an increased preference for shopping organic, this creates opportunities for grocers to work with local producers to bring farmer's markets online.



Membo, an Estonian platform, lets shoppers purchase fresh and seasonal groceries directly from local producers.

Consumers can browse options from local sellers and have everything delivered in one go.⁵⁴

Key takeaways:



- More shoppers are prioritising sustainability, preferring to shop with grocers that sell eco-friendly and local brands
- Shoppers are willing to pay a premium for more sustainable products
- Grocers that make eco-friendly options visible and easily available for shoppers can appeal to more consumers

90%
of Europeans avoid
ordering groceries
online because they
prefer to see food
or produce before
they buy²



Store-to-door retail

On-demand could very well be the retail buzzword of the decade. Being able to receive your order within two hours used to be a novelty, but startups like Gorillas,⁵⁵ Getir,⁵⁶ and Glovo⁵⁷ are reinventing the last-mile landscape with 10 to 15-minute grocery deliveries. But, experts are cautioning that these services could just be a fad.



The big focus in food/grocery delivery at the moment is on speed. One operator comes along offering 30-minute delivery, and then another promises 20-minute delivery, and then another promises 15-minute delivery. This is fine if you are looking for one or two items, but I think speed is receiving unnecessary focus at the moment

Stephen Wynne Jones, Editor, European Supermarket Magazine

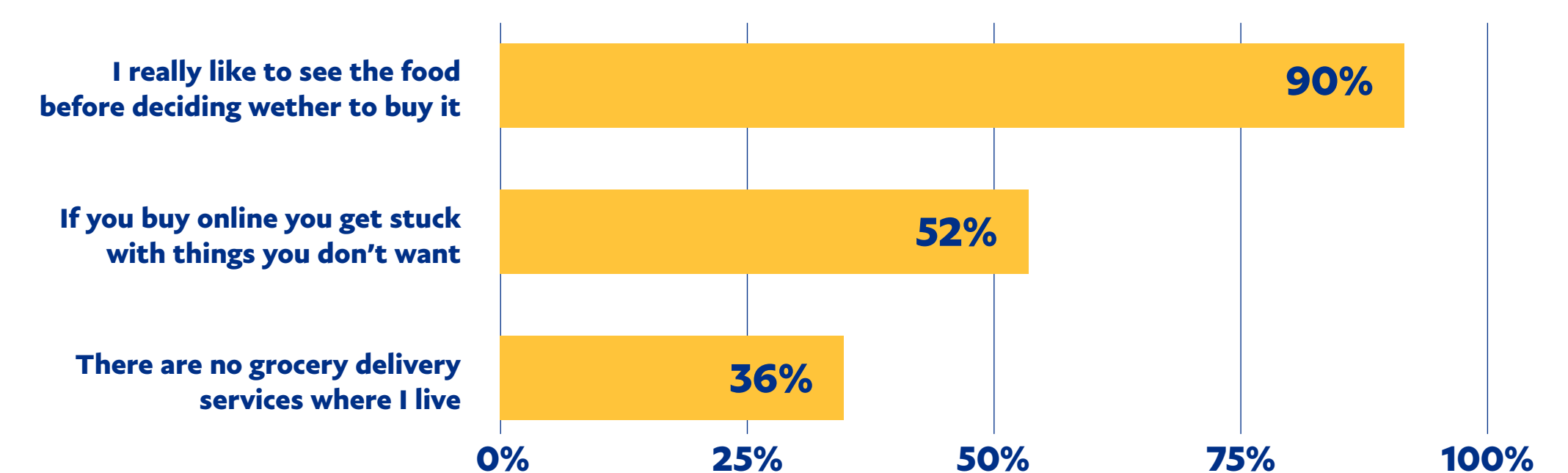


Instead of focusing on ultra-fast delivery turnovers, grocers with already robust home delivery options are setting themselves apart with store-to-door retail experiments.

Think roving robot supermarkets, and automated stores.

Store-to-door retail could address consumer hesitancy about ordering online and make groceries more accessible to elderly shoppers and those with limited mobility.

What stops Europeans from buying groceries online?²



How the industry is innovating

1. Self-driving snack shops

Snacks were a leading driver for European grocery sales over the past two years. 88% of consumers now snack for distraction, or to fulfil emotional needs.⁵⁸



To satisfy this growing habit, German grocers REWE partnered with Vodafone to launch the first European Snack Mobil in Cologne.

Office workers and passers-by can hail a self-driving store on the street to buy snacks and drinks. Payments are all online and contactless.⁵⁹

2. Automated roving grocers

8 in 10 shoppers avoid buying groceries online because they prefer getting items when they need it, rather than buying quantities in advance.² However, consumers who lack the access or time to make a grocery trip can benefit from self-driving stores that bring necessities to their doorstep.

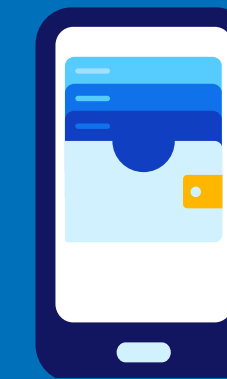


Robomart is one such roving grocery store in California. Shoppers can use an app to select the type of Robomart they need—grocery or pharmacy—check the roving store’s inventory and hail the self-driving shop to their location.

A swipe on the app unlocks the Robomart’s door, and shoppers simply grab and go. Products taken are tracked by sensors, and shoppers are charged via their preferred online payment method stored in the app.⁶⁰

3. Unmanned digital grocery stores

Last-mile delivery is a perennial pain point for consumers and retailers. Shoppers expect increasingly speedy fulfillment times and cheaper fees, but last-mile delivery remains the most expensive part of e-commerce for retailers. In the grocery space, unmanned stores are proving to be the cost-effective solution.



Swedish unmanned digital grocery store Livfs first opened in 2020, and has expanded to 27 stores around Sweden, with 90% of its locations in rural areas.

Shoppers enter the Livfs store with an app that’s linked to their bank ID. They then scan items with the app, and payment is deducted from the stored card.

While most cashier-less grocery stores still hire retail associates to assist shoppers, Livfs operates entirely without manpower, 24/7. This helps keep product prices low, so consumers have access to affordable groceries whenever they need them.⁶¹

Unmanned stores also offer cross-border expansion potential for retailers, especially in rural areas, matching local demands for tech-forward, modern grocery shopping experiences. A frictionless payment provider like PayPal can help to ensure transactions are intuitive and secure in the future of store-to-door retail.



Key takeaways:

- Self-driving robot shops and unmanned grocery stores give consumers easy access to necessities on-demand
- Leverage the latest relevant developments in technology to keep your grocery retail and customer experiences ahead of industry norms
- A trusted, secure online payment provider like PayPal can fine-tune your store-to-door retail service

Future-proof your grocery business with support from PayPal

The future of grocery retail is driven by technology and fuelled by ever-evolving consumer demands. With 20+ years of experience, PayPal is the agile online payment partner your business needs to adapt, attract consumers, increase conversions, and enter new markets in the ever-developing grocery landscape.

75% of consumers trust PayPal the most due to its consistency and reliability⁶²

For your grocery retail business, PayPal delivers:

- Online payment services in 200+ markets, enabling your local and cross-border expansion
- Comprehensive fraud monitoring technology and AI-based risk intelligence services
- A streamlined payments system that works for your business and retail model
- New opportunities for strategic partnerships with third parties

With PayPal, your shoppers enjoy:

- Frictionless checkout across devices and channels with our cloud-based, optimised payments processing
- Multi-currency payments in over 100+ currencies, and easy access to their preferred payment methods
- 24/7 anti-fraud monitoring and a commitment to keeping their transactions secure

Want to find out more about the state of European grocery retail today? Download our report, **'Trends and Opportunities: The European grocery landscape in 2022'**





About PayPal

PayPal has remained at the forefront of the digital payment revolution for more than 20 years. By leveraging technology to make financial services and commerce more convenient, affordable, and secure, the PayPal platform is empowering more than 400 million consumers and merchants in more than 200 markets to join and thrive in the global economy.

For more information, visit paypal.com/uk/enterprise



About this TrendWatching study

Purpose-Driven Innovation (PDI) is an analytical framework and methodology developed by TrendWatching to help business professionals identify and act on meaningful business opportunities. It's anchored in basic human needs, drivers of change and innovations. TrendWatching is supported by research network tw:in, which consists of 700+ spotters across more than 60+ countries.

About TrendWatching

As one of the world's leading consumer trend firms since 2002, TrendWatching is purpose-built to guide, inspire and empower business professionals – whether they be marketers, creatives, strategists, entrepreneurs, or innovators – to bring to market more sustainable and impactful innovations that benefit all, not the few.



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