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**Report Highlights:**

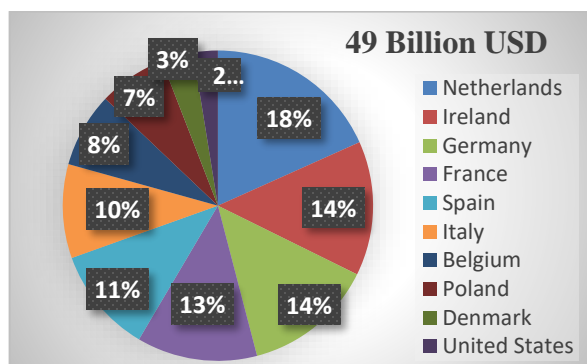
The UK retail sector is one of the most sophisticated in the world. The UK was one of the first to pioneer 'Click and Collect' and online grocery shopping. COVID-19 has seen the way in which consumers shopping patterns changed in the past year with online shopping far more popular. Consumers are more health conscious and are choosing to shop more locally. The four leading supermarket chains compete fiercely for customers with the discount chains increasing their market share yearly. Within the UK retail sector, grocery retailing continues to record the biggest growth. Convenience stores, discounters and online grocery are formats seeing the strongest expansion, with chains opening smaller stores in city centers while limiting large-format outlets in out-of-town locations. Tariffs and 'Buy British' campaigns are the biggest challenge for U.S. companies. Products with the biggest opportunities are those that have a healthy, sustainable, and environmentally friendly message.

## Fact Sheet: United Kingdom

### Executive Summary

The United Kingdom (UK) is the second largest economy in Europe. Agriculture is intensive, and efficient by European standards but is less than one percent of Gross Domestic Product (GDP). While UK agriculture produces about 55 percent of the country's food needs with less than two percent of the labor force, the UK is heavily reliant on imports to meet the varied demands of the UK consumer who expects year-round availability of all food products. The UK is very receptive to goods and services from the United States. With its \$2.84 trillion GDP in 2020, the UK is the United States' largest European market and the fifth largest in the world for all goods. Consumer-oriented products remain the most important sector for U.S. agriculture, amounting to \$1 billion in 2020. Demand for U.S. consumer-oriented food products continues to differentiate the UK from many of its European neighbors. The UK is the 12th largest market in the world for U.S. agricultural and related products.

#### Consumer-Oriented Imports in 2020



Source: TDM

### Food Processing Industry

The food and drink sector is the largest single employer in the UK manufacturing sector. Latest data shows the food and drink sector had an annual turnover in 2019 of \$145 billion. Around 430,000 people across the UK are employed in jobs associated with food and drink manufacture and sales.

### Food Retail Industry

The food retail sector is saturated, highly consolidated, and competitive. The top five retail groups together account for 75 percent of the market. Independent stores continue to face strong competition from modern grocery retailers. Online food sales are showing tremendous growth, with the sector valued at \$15.2 billion (£12.7 billion) in 2019. UK consumers are willing to try foods from other countries but expect quality products at a competitive price.

#### Quick Facts

**Population :** 66.7 million (2019 est.)  
**GDP :** \$2.82 trillion  
**GDP/Capita :** \$42,330 (2019 est.)

#### List of Top 10 Growth Products in UK

1. Beef
2. Oilseeds
3. Dairy products
4. Rice
5. Dog and cat food
6. Beer
7. Chocolate products
8. Confectionery
9. Food preparations
10. Proc. vegetables

#### Food Industry by Channels

Consumer-Oriented Imports \$49 billion  
 Food Processing Industry \$145 billion  
 Retail \$282 billion

#### Top Ten Food Retailers

1. Tesco
6. Co-op

Strength	Weakness
UK is one of the biggest markets in Europe with one of the highest per capita income globally	U.S. products face competition from tariff-free products from the EU and FTA partners.
Opportunity	Challenge
Common language and shared heritage make the UK an attractive market.	Sanitary (animal health) and phytosanitary (plant health) restrictions make exporting to the UK complicated.

2. Sainsbury's
3. Asda
4. Morrison's
5. Aldi
7. Lidl
8. Waitrose
9. Iceland
10. Marks & Spencer

Data sources include: TDM, The World Factbook, and The World Bank. For more information, contact [aglondon@fas.usda.gov](mailto:aglondon@fas.usda.gov).

## I. Market Summary

The UK retail grocery market sector was valued at \$297 billion (£205 billion) in August 2020, an increase of 6.7 percent on 2019. The [Institute of Grocery Distribution \(IGD\)](#) estimates that the UK grocery market will be worth \$306 billion (£211 billion) in 2022. Online grocery shopping was the fastest growing channel in 2020 and is expected to increase 59 percent between 2019 and 2022. While it is expected to grow, it will be at a slower pace to the beginning of the pandemic. Discounters will be the fastest growing channel in 2021 and 2022, as both consumers recognize quality and value. By 2022, discounters will be worth \$44.8 billion (£30.9 billion), and convenience store sales are expected to increase moderately in the next two years from \$59.4 billion (£41.0 billion) in 2019 to \$67.2 billion (£46.4 billion) by 2022. Click and Collect sales will continue to increase. Other stores such as B&M, Home Bargains, Iceland, and Poundland continue to increase their grocery sections.

The UK grocery sector flourished in 2020 and COVID-19 changed the ways in which people shop. These trends are set to continue with consumers reverting to one large shop per week, shopping online, and locally. In the past year, three quarters of shoppers have tried online grocery shopping, with those aged 35 and under as the biggest group to try online shopping for the first time. These trends are likely to continue.

Consumers are choosing to support local businesses and therefore shopping locally and sales from these ‘**convenience shops**’ increased 179 percent on the previous year. These stores are mainly ‘top up’ shops for milk, bread, snack foods, and convenience meals. Many mainstream grocery lines such as confectionery, cereals, baking mixes etc., are sold in the independent convenience stores, so this presents an opportunity for U.S. products.

Consumers are more health conscious now and are considering different healthier options. Initially, sales of snack foods and sweet treats increased during the first part of lockdown in 2020; however, with increased UK government guidance encouraging citizens to eat healthier, reduce sugar and fat consumption, and cook from fresh, this increased the preference for **healthy foods**.

UK consumers are buying more [organic food](#). Sales of fresh vegetables rose by more than 15 percent in the past year. According to [Statista](#), in 2019, \$2.3 billion (£1.67 billion) was spent on Fairtrade food and drink products in the UK. Organic and Fairtrade products will maintain their growth, with some consumers considering these options to be safer and of a higher quality.

The rise of **vegetarianism and veganism** will continue to expand, highlighting the importance of including fruit and vegetables in the daily diet and driving growth. One of the biggest trends is the move towards sustainable products. Consumers (whether or not vegetarian) are choosing to eat more plant based or meat alternative products to help the environment.

Retail food prices in the UK are much cheaper than those found in other parts of Europe or other western countries. Apart from supplying quality products, consumers consider the price of the product as one of the major factors to consider when shopping either online or in the grocery store. This makes the UK grocery sector a highly competitive market. The retailers can achieve low pricing due to fierce competition and the vast amount of product bought. The rise of the discounters has further increased

buying power. With added import duty this tends to make U.S. products more expensive and less competitive than other products found on UK supermarket shelves.

One of the biggest trends is the move towards more **sustainable food products**. Consumers are more conscious to what they eat and the effect it has on the environment. With the food choices they make, they want to feel that they are playing their part in reducing the amount of greenhouse gases and deforestation. Consumers want food sold in UK retailers to be produced more sustainably. Sustainability and climate change is at the forefront of UK retailers' minds and is part of the decision-making process.

### **Packaging Regulations**

In recent years, there has been a rise in public awareness of the negative environmental impact of plastic pollution. Plastic packaging of food causes a significant proportion of the UK's plastic waste. Manufacturers and retailers are exploring alternatives to single-use plastics, particularly in relation to fresh produce, including increasing the availability of loose items in supermarkets. The UK Government has a strong green agenda that brought in legislation to reduce single use plastics. UK retailers joined together to sign up to the [UK Plastics Pact](https://wrap.org.uk/taking-action/plastic-packaging/the-uk-plastics-pact), a voluntary initiative with targets to reduce the use of plastics. More information can be found at: <https://wrap.org.uk/taking-action/plastic-packaging/the-uk-plastics-pact>

### **Key market drivers and consumption trends**

- **Health & Wellness Products:** the aging population and increased health consciousness of consumers is fueling the demand for health and wellness products, as well as functional food products.
- **Convenience Ready Meals:** increasingly high-paced society and the rising number of single households are driving the demand for convenient ready-to-eat meals, desserts, and baking mixes.
- **Free-From Products:** e.g., gluten, dairy, or lactose free, are products UK consumers are drawn to.
- **Locally Grown:** "Buy British" campaigns are attracting UK consumers to purchase locally grown products, and to support local farmers.
- **Sustainability and Environmentally Friendly Products:** There is an increasing share of consumers who have concern for animal welfare and who view their purchasing decision as a political or lifestyle statement. Consumers increasingly require traceability and information about production methods.
- **Vegan & Vegetarianism:** UK consumers are choosing to become vegan, vegetarian, or flexitarian in order to be more sustainable and to help the environment.
- **Ethnic Foods:** the UK has a large ethnic population who fuel the demand for ethnic cuisines.
- **Fair Trade and Organic Products:** are becoming increasingly popular, as there perceived to better for you.

**Table 1: Advantages and Challenges**

<b>Advantages</b>	<b>Challenges</b>
Market dominated by a few retailers with strong market penetration. Sophisticated replenishment systems mean U.S. products can be widely distributed.	Supermarket chains demand significant volume, and their concentration can make market access difficult initially. Trial listings must give results in a short time or product will be de-listed.
There are many specialty importers capable and interested in importing from the United States.	The UK has well-established brands for mainstream products. Brand-building and marketing costs are substantial.
Some U.S. products are priced competitively.	Trade barriers imposed on U.S. products e.g., meat and poultry.
The country is English speaking and is therefore an easier gateway into the rest of Europe for U.S. exporters.	EU competitors do not pay import duty on goods to the UK. The United States pays 0-25 percent import duty, depending on the product.
The United States is a popular destination for UK tourists and familiarity with U.S. products is widespread.	Popularity of specialty products from many EU countries is high, e.g., French cheeses, Spanish citrus, Italian pasta, South African produce.
The U.S. has an opportunity to promote products that focus on the environment, sustainability, and health.	Anti U.S. lobby on food products intensified at the start of U.S.– UK trade agreement talks

Source: FAS London

## **II. Road Map for Market Entry**

A U.S. company first needs to decide what market sector they wish to penetrate and whether their products will be private label or branded. For years, importers have played a key role when doing business in the UK. Food importation is a specialized business, and an importer plays a pivotal role in navigating the hurdles of UK food law. It is much harder to supply UK retailers directly. However, retailers want to keep prices as low as possible and will occasionally look to source directly from suppliers.

Importers normally carry a large variety of products. Many importers of non-frozen and chilled foods have in-house distribution networks and warehousing facilities, while smaller importers contract out. Many fresh produce importers have controlled-atmosphere warehousing facilities and almost all importers of frozen and chilled foods contract out to specialized storage, handling, and distribution companies. The terms and lengths of association between the U.S. company and the foreign importer are normally established by contract.

Some of the largest importers will only consider a product if it has large volume potential in the UK supermarket chains and is backed by substantial marketing and financial support. Others specialize entirely in independent grocer or food service distribution. Costs vary widely too. Some importers may ask for a start-up fee; some are commission-only agents; and others may seek a fixed fee that switches to commission when sales reach a target level. A full brokerage rate may range anywhere between 17 and 25 percent. Marketing costs from FOB level to retail may include some or all the following: sea/air freight costs, insurance costs, import duty/value added tax/excise duty (if applicable), customs entry and clearance, handling charge to importer (can be a small charge deducted from wholesale price),

packaging and labeling, overheads, wastage, and shrinkage allowance, and mark-up by supermarket retailer (35-70 percent).

Large U.S. companies with substantial financial backing may be able to work with an importer to supply the UK supermarket chains immediately upon market entry. For small/medium sized U.S. companies, it is normal to work with an importer to gain product listings in department store food halls, delicatessens, and independent retailers first. Once a sales volume and record of accomplishment has been established, it is then possible for the importer to attempt listings in smaller retail chains, with a view to ultimately supply the four key supermarket chains. If a U.S. company is looking to bring a brand to the UK, the retailers expect that they will support the brand financially. Many retailers demand [BRC](#) or [IFS](#) accreditation for listing brands to protect themselves in case there are issues concerning the brand. If a U.S. company wants to penetrate elements of food service, convenience, or specialty grocery sectors, where private label is not as strong, the financial support may not be as great.

In choosing a UK importer, it is essential to consider the retail outlets to which they currently supply. A U.S. exporter needs to understand a UK importer's distribution capacity and ensure that the UK importer can supply the retail outlets that best fit the appropriate UK consumer base. Market entry to the UK requires substantial homework on the part of the U.S. exporting company to ensure that all import regulations and labeling laws are met. These are covered in the [Food and Agricultural Importer Regulations \(FAIRS\) Report](#).

Once U.S. companies have acquired this background information, they may consider attending or visiting one of Europe's [USDA endorsed trade shows](#). They serve as a springboard into the market, helping companies to establish new trade contacts and gauge product interests. The [International Food Exhibition](#) is a newly endorsed USDA tradeshow and will take place in London, March 21-23, 2022. It is the UK's largest food trade show and includes six shows in one. If you would like information about this show, please send an email to [aglondon@usda.gov](mailto:aglondon@usda.gov).

U.S. exporters can also contact their respective [U.S. State Regional Trade Groups \(SRTG\)](#), their [Commodity Cooperator Group](#), and their state Department of Agriculture to obtain additional support. SRTGs are non-profit trade development organizations that help U.S. food producers and processors to enter overseas markets. They are funded by USDA/FAS and private industry and conduct promotional activities to increase exports of U.S. high-value food and agricultural products. The [U.S. Agricultural Export Development Council](#) is composed of U.S. commodity trade associations and other organizations, in addition to the SRTGs, with an interest in promoting U.S. agricultural exports. They regularly organize (reverse) trade missions, often around trade shows or other events. These are excellent platforms for U.S. suppliers to meet foreign buyers.

## **Market Structure**

According to data from the [Office of National Statistics](#), in 2020, the average UK household spent \$4,636 (£3,312) on groceries and \$2,402 (£1,716) on restaurants and takeaways. As a result, in 2019 UK households spent 16 percent of their budgets on food and non-alcoholic drinks. Another three percent of budgets went to alcohol. Of this, groceries account for 11 percent of total household spending in the UK, making it the third largest area of expenditure, following housing and transport. British consumers make several visits to grocery stores each week, conducting one big shop, but many smaller top up shops.

## Profiles of Different Food Retailers in the United Kingdom

Retailer Name and Outlet Type	No. of Outlets (2021)	Market Share (April 2021)	Website
<b>Tesco</b> (Mid-range supermarket) Hypermarkets, Supermarkets & Express stores.	3,968	27.0%	<a href="http://www.tesco.com">www.tesco.com</a>
<b>Sainsbury's</b> (Mid-range supermarket) Supermarkets & convenience stores.	1,428	15.3%	<a href="http://www.sainsburys.co.uk">www.sainsburys.co.uk</a>
<b>Asda/Wal-Mart</b> (Mid-range supermarket)	631	14.8%	<a href="http://www.asda.co.uk">www.asda.co.uk</a>
<b>Morrisons</b> (Mid-range supermarket)	494	10.0%	<a href="http://www.morrisons.co.uk">www.morrisons.co.uk</a>
<b>Aldi</b> (Discounter supermarket)	874	8.0%	<a href="http://www.aldi.co.uk">www.aldi.co.uk</a>
<b>Co-op</b> (Mid-range supermarket, primarily British products)	4,022	6.2%	<a href="http://www.coop.co.uk">www.coop.co.uk</a>
<b>Lidl</b> (Discounter supermarket)	800	6.0%	<a href="http://www.lidl.co.uk">www.lidl.co.uk</a>
<b>Waitrose</b> (Upscale supermarket)	338	5.0%	<a href="http://www.waitrose.co.uk">www.waitrose.co.uk</a>
<b>Whole Foods Market</b> (Very upscale supermarket).	1 main store and 6 smaller stores	n/a	<a href="http://www.wholefoodsmarket.com/stores/list/uk">www.wholefoodsmarket.com/stores/list/uk</a>
<b>Costco Wholesale</b> (Warehouse – Membership)	29	n/a	<a href="http://www.costco.co.uk">www.costco.co.uk</a>

Source: Supermarket websites & [Kantar Worldpanel](#)

### Retail Outlets

Four supermarket chains dominate UK food retailing, accounting for 67 percent of the market. Tesco is the market leader, with 27 percent market share, followed by Sainsbury's with 15.3 percent, Asda with 14.8 percent and Morrisons with 10 percent. Other UK supermarket chains include Aldi, The Co-op, Waitrose, Lidl, and Iceland.

**Discounters** - The discounters, Aldi, and Lidl, continue to gain market share. In the 12 weeks ending April 18, 2021, the discounters combined market share reached 14 percent. Discounters show no signs of stopping with plans to open hundreds more stores in the next two years.

**Private Label** - The UK has one of the most advanced private label markets in the world and is seen as a flagship market for private-label development. The UK's major supermarket chains dominate the private-label market with 42 percent of products in their stores being private label. Originally, private label goods were a copy of a branded product but today they are often innovative and marketed as a premium or high-quality brand. They give UK retailers the opportunity to diversify their product ranges and develop new revenue streams. According to [Kantar](#), the average UK household buys a private label product 187 times per year, meaning that most households buy between 40 and 70 percent, private label items, from all of the groceries they buy.

**Click and Collect** – Click-and-Collect is a concept, which brings together the benefits of online retailing with the advantages of keeping a store-based retailing presence. Through these services, customers access a vast catalogue of products from the comfort of their home, buy the items online, and

then collect the items from a store within easy reach. The advantage of convenience and choice are passed onto the consumer and even the largest retail outlet would struggle to stock the range and quantity of products. The top four UK supermarket chains all offer click and collect, with the discounters, Aldi and Lidl trialing this service in some stores. The increased demand for online grocery shopping is set to continue, however, to make it profitable, retailers need to convince more consumers to use the click and collect in store option, saving on delivery costs.

**Convenience Stores or the “C-Sector”** - The UK’s convenience store market is highly fragmented, with many retail operators. Store operators may be divided into several types: supermarket convenience stores, gas stations, other group food convenience stores, independent grocery stores, and specialist stores, such as newsagents, greengrocers, etc.

COVID-19 has driven significant additional demand through the convenience market channel, as it meets shoppers needs to shop local during lockdown. [Mintel](#) forecasts an eight percent growth in 2020 to take the market to \$68.8 billion (£47.5 billion). Whilst the sector is benefiting from larger basket sizes, this comes at the expense of lower on-the-go food demand. This is a key aspect of trade within convenience retailing, with 44 percent of consumers using convenience stores for on-the-go food and drink, however, with consumer movement restricted and widespread working-at-home practices, this demand has decreased. Eighty-five percent of consumers have shopped in a convenience store in the last year, with food being the most purchased item. Tesco is the most used store, followed by the Coop. Growth within this channel is expected to be moderate in the next two years.

**Food Halls** - In addition to the above retail avenues, department store “food halls” and delicatessens present opportunities for listings of U.S. products. London-based department stores such as [Harvey Nichols](#) and [Selfridges](#) have expanded to other major UK cities - including Birmingham, Manchester, and Leeds. Other notable department stores stocking U.S. products are [Fortnum and Mason](#) and [Harrods](#). Key London delicatessens for U.S. products include [Partridges](#) in Kensington, and [Panzers](#) in St. John’s Wood.

### III. Competition

#### Challenges:

- European countries as well as third countries with a free trade agreement in place have an advantage over the United States because of zero tariffs.
- Current ‘Buy British’ campaigns are a challenge for U.S. companies as they encourage UK consumers to buy local and support local farmers. To kick start the economy, the latest ‘Buy British’ campaign launched in December 2020 aims to promote British products and asks UK consumers to support products grown and made in the UK. Most grocery stores have incorporated this campaign into the marketing of products. The UK [National Farmers Union](#) support this campaign.
- The EU is the main competitor for U.S. consumer-orientated food. The EU supplies 26 percent of food consumed in the UK. EU food exporters have relatively low transportation costs and fast delivery times. Their products do not face import duties, nor do they face major ingredient or labeling changes. Products are sourced from the Netherlands, France, Ireland, Denmark, Germany, Italy, and Spain. Fruits and vegetables primarily come from the EU. According to the [Office of National Statistics](#), the United States is the largest non-EU supplier to the UK, with around four percent of all UK food and drink imports. China, Brazil, South Africa, and Canada are some of the



other top non-EU suppliers. The three largest value imported commodity groups were fruit & vegetables, meat, and beverages.

- Anti U.S. lobby on agricultural products has been increasing for several years, and this intensified with the start of the U.S. – UK trade talks. There continues to be numerous media articles written against U.S. food products. In the past it has been non-government organizations who have fed the media these stories, however in recent months there have been many from UK trade associations, as well as UK supermarkets and farmers wanting to protect UK products.

#### **Advantages:**

- U.S. companies could have an advantage over other countries if they educate consumers through their products, and product labels to highlight that they are environmentally aware, and that the product is sustainable. Sustainability and climate change is at the top of all UK food retailers' agendas and is the primary focus moving forward.
- Products that are convenient and have a health focus have good potential in the UK. In the last decade, the UK consumer's appetite for "healthy", convenient, and ethnic foods has grown. There is an increasing demand for quick meal solutions, such as chilled ready meals or ingredients, and single snack portions. As a result, the UK domestic food manufacturing industry is sophisticated and advanced. UK new product development teams create innovative copies of international dishes and ready meals. If a U.S. product has been particularly successful in the UK, it is likely that a manufacturing site will be placed in the UK or EU.

#### **IV. Best Product Prospects**

**Products in the Market That Have Good Sales Potential :** **Processed Products:** health food, mainstream grocery, snack foods, **Dried and Processed Fruit:** cranberries, dried cherries, prunes, raisins, wild berries, **Nuts:** almonds, peanuts, pecans, pistachios, walnuts, **Fish and Seafood:** cod, pollack, salmon, and other fish products, **Fresh Fruit and Vegetables:** apples, grapefruit, sweet potatoes, table grapes, **Meat:** hormone-free beef and pork products, **Drinks:** craft beer, spirits, wine, low alcohol products, **Food Ingredients** and **Wood pellets and other waste/residues for renewable fuels.**

**Products Not Present Because They Face Significant Barriers:** Food additives not approved by the UK, red meat and meat products produced with growth promotants, most poultry and eggs and genetically modified products that are not approved in the UK.

## Trends in Imports from the United States of Consumer-Orientated Foods

Product Category	Growth 2015 –2020 (%)	U.S. Exports to UK 2020 (\$ million)
Wine	-16.9	235.9
Tree Nuts	-4.5	197.4
Food Preparations	+13.5	155.5
Distilled Spirits	-63.8	83.4
Fresh Vegetables	+8.9	73.1
Bakery Goods, Cereals, and Pasta	-11.7	56.3
Processed Fruit & Vegetables	-51.5	53.9
Dairy Products	+505.0	35.7
Condiments & Sauces	+21.5	33.9
Chocolate & Cocoa Products	-4.1	32.3
Confectionery	-2.7	24.9
Non-Alcoholic Beverages Exc. Juices	-32.0	24.0
Eggs and Products	+55.9	19.8
Other Consumer Oriented	-29.3	15.4
Beer	-34.8	14.0
Fresh Fruit	-61.4	12.1
(Dog & Cat Food)	+7.7	8.3
Fruit & Vegetable Juices	-44.0	5.2
Pork & Pork Products	-15.0	3.4
Beef & Beef Products	-95.0	0.6
Poultry Meat	-33.3	0.4

Source: BICO Report/U.S. Bureau of the Census Trade Data

### V. Key Contacts and Further Information

If you have any questions or comments regarding this report, require a listing of UK importers or need any other assistance exporting to the United Kingdom, please contact the USDA office in London.

**United States Department of Agriculture**, Embassy of the United States of America, 33 Nine Elms Lane, London, SW11 7US, Tel: +44 20 7891 3313 E-Mail: [aglondon@usda.gov](mailto:aglondon@usda.gov)  
Website: [www.fas.usda.gov](http://www.fas.usda.gov) or <https://uk.usembassy.gov/>

FAS London publishes other market and commodity reports available through the Global Agricultural Information Network (GAIN) at <https://www.fas.usda.gov/data/search>

Further information on the UK retail grocery sector is available from the British Retail Consortium or the Institute of Grocery Distribution.

**British Retail Consortium (BRC)**, Tel: +44 20 7854 8900 Website: [www.brc.org.uk](http://www.brc.org.uk)

The British Retail Consortium is the lead trade association representing the whole range of retailers from large multiples and department stores through to independents.

**Institute of Grocery Distribution (IGD)**, Tel: +44 1923 857141 E-Mail: [igd@igd.com](mailto:igd@igd.com) Website: [www.igd.com](http://www.igd.com) The IGD is the UK trade association for information about the food and grocery chain.

One service offered is the Retail Analysis - [www.igd.com/analysis](http://www.igd.com/analysis). This covers more than 130 retailers in 50+ countries. Retail Analysis provides an understanding of retailer strategies, as well as the latest news in this sector.

**Attachments:**

No Attachments