Food and Grocery Retailing in Italy - Market Summary and Forecasts; Comprehensive overview of the market, consumer, and competitive context, with retail sales value and forecasts to 2019

Description:
Summary
The economic crises had a significant impact on consumer purchasing behavior, as they reduce their spending and look out for better deals. Consumers are shifting from hypermarkets towards convenience stores and discount supermarkets, and are looking to make smaller purchases with frequent store visits, where they have better control over their purchases; most Italians rely on local food shops for purchases. Food and grocery accounts for the highest share, with 56.7% of the total retail sales in 2014, growing at a CAGR of 1.3% over the forecast period, to reach EUR201 billion by 2019.

Key Findings
- Food and grocery is expected to grow at a CAGR of 1.3% over the next five years
- Italian shoppers are increasingly looking for value through discount and private label goods for grocery purchases.
- The online channel covers only 0.1% of the food and grocery market, due to the difficulty of delivering products and Italian consumers’ preference for local food shops.
- Growing aging population and single households in Italy open new opportunities for retailers
- Packaged food segment is expected to be the most promising market during the forecast period, with a CAGR of 1.9% over the next five years.

Synopsis
“Food and Grocery Retailing in Italy - Market Summary and Forecasts” is a detailed sector report providing a comprehensive analysis of the emerging trends, forecasts and opportunities to 2019.

What else does this report offer?
- A thorough analysis of consumer trends changing economic and population factors
- Both qualitative and quantitative insights and analysis of the shifting food and grocery retail dynamics for drinks, household products, packaged food, tobacco and unpackaged food from 2009 to 2019
- Sales of food and grocery products through the following channels from 2009 to 2019: Hypermarkets, supermarkets and hard-discounters; food and drinks specialists; convenience stores (including Independents) and gas stations; cash and carries and warehouse clubs; other general and non-specialist direct retailers; value, variety stores and general merchandise retailers; online; drug stores and health and beauty stores; vending machines; duty free retailers; department stores; other specialist retailers
- An overview of key food and grocery retailers operating across Italy and their presence across distribution channels

Reasons To Buy
- Gain a comprehensive knowledge on food and grocery sector in the Italian retail market and develop a competitive advantage from the start of your supply chain
- Investigate current and forecast behaviour trends in food and grocery category to identify the best opportunities to exploit
- Analyze the recommended actions to align your marketing strategies with the crucial trends influencing the consumer behavior
- Understand the fastest growing categories including drinks, household products, packaged food, unpackaged food and tobacco in the market, with insights on performance across key channels from 2009, with forecasts until 2019.

- Explore novel opportunities that will allow you to align your product offerings and strategies to meet demand by analyzing the vital economic and population trends, key consumer and technology trends influencing the food and grocery market.

- Analysis of key international and domestic players operating in the food and grocery market - including store counts and revenues that give you a competitive edge - identify opportunities to improve your market share.

Contents:

1 Introduction
1.1 What is this Report About?
2 Executive Summary and Outlook
3 Market Context
3.1 An economy with a rising unemployment and growing debt levels
3.1.1 Italian economy shows signs of modest recovery after two years of recession
3.1.2 Households rebuild their savings influenced by gloomy economic conditions
3.1.3 Services sector remains the dominant sector for employment
3.1.4 Threat of deflation is a concern for the Italian economy
3.1.5 Ongoing fiscal austerity and rising unemployment impacts the household consumption
3.2 Italy's population growth rate declines due to economic downturn
4 Italian Shoppers
4.1 Retail sales plummet against a backdrop of low consumer confidence
4.2 Shopping tourist contribute in a major way towards retail sales in the country
4.3 Growing internet and social media usage affect consumer's purchasing behaviour
4.4 An increasing aging population deters retail sales growth across specific categories
5 Doing Business in Italy
5.1 Summary
5.1.1 Bureaucracy
5.1.2 Business culture
5.1.3 Geography
5.1.4 Infrastructure and logistics
5.2 Jobs Act set to bring in labor market reform
5.3 Stability Law 2015 may have negative impact on retailers
5.4 Taxation in Italy
5.4.1 Corporate income tax
5.4.2 Withholding tax
5.4.3 Indirect tax
5.4.4 Value added tax (VAT)
6 Retail - Product Sectors
6.1 Product Sector Analysis
6.1.1 Food and Grocery
6.2 Food and Grocery Category Overview
6.2.1 Food and Grocery by Channel
6.3 Food and Grocery Category Analysis
6.3.1 Drinks
6.3.2 Household Products
6.3.3 Packaged Food
6.3.4 Tobacco
6.3.5 Unpackaged Food
6.4 Major Retailers
6.4.1 Food and Grocery
7 Appendix
7.1 Definitions
7.1.1 This report provides 2014 actual sales; while forecasts are provided for 2015 - 2019
7.2 Summary Methodology
7.2.1 Overview
7.2.2 The triangulated market sizing method
7.2.3 Industry surveys in the creation of retail market data
7.2.4 Quality control and standardized processes
7.3 About
7.4 Disclaimer

List of Figures

Figure 1: GDP Value (US$ billion), 2008-2014
Figure 2: Growth Rate of GDP (US$ billion, %), 2008-2014
Figure 3: GDP Value and Growth (EUR billion, %), 2008-2014
Figure 4: Forecasts for GDP Value and Growth (EUR billion, %), 2014-2019
Figure 5: Gross Domestic Savings Rate (% of GDP), 2004-2014
Figure 6: Share of Employment by Sector (%), 2004 and 2014E
Figure 7: Unemployment Rate(%), 2004-2014
Figure 8: Inflation Growth Rates (%), 2004-2014
Figure 9: Household Consumption Expenditure of Italy (EUR billion), 2004 and 2014
Figure 10: Household Consumption Expenditure of Major Countries (US$ billion), 2014
Figure 11: Growth of Household Consumption Expenditure (US$, %), 2004-2014
Figure 12: Rural and Urban Populations (millions) 2004, 2014, and 2019
Figure 13: Total Population and Growth Rate (Millions, %), 2004-2019
Figure 14: Population Split by Gender (%), 2014 and 2019
Figure 15: Population Split by Age Group (%), 2014 and 2019
Figure 16: Per Capita Spend on Retail (EUR), 2006 and 2014
Figure 17: Per Capita Spend (EUR) and Total Retail Spend by Age Group (%), 2006 and 2014
Figure 18: Consumer Confidence Index from 2011-2014
Figure 19: Tourist arrivals to Italy, (in thousands), 2009 and 2014
Figure 20: Social Network users and Penetration, Jan-2015
Figure 21: Rise in aging population and median age to affect overall consumer spending
Figure 22: Key Components of Doing Business in Italy
Figure 23: Share of Food and Grocery in Total Retail Sales, 2014 and 2019
Figure 24: Retail Sales Value and Growth (EUR billion, %) of Food and Grocery, 2014-2019
Figure 25: Spend per Head on Food and Grocery, 2014 and 2019
Figure 26: Online Spend in Food and Grocery (EUR billion, %) 2014-2019
Figure 27: Online Share of total Food and Grocery Spend, 2014 and 2019
Figure 28: Spending per Channel in Food and Grocery (%), 2014 and 2019
Figure 29: Italy Food and Grocery Retail Sales and Forecast (EUR mn), by Channel Group, 2009-2019
Figure 30: Italy Food and Grocery Retail Market Dynamics, by Channel Group, 2009-2019
Figure 31: Italy Food and Grocery Retail Sales and Forecast (EUR mn), by Category 2009-2019
Figure 32: Italy Food and Grocery Retail Market Dynamics, by Category 2009-2019
Figure 33: Italy Drinks Retail Sales and Forecast (EUR mn), by Channel Group, 2009-2019
Figure 34: Italy Drinks Retail Sales Forecast (EUR mn), by Channel Group, 2009-2019
Figure 35: Italy Drinks Retail Sales (US$ mn), by Channel Group, 2009-2019
Figure 36: Italy Drinks Retail Segmentation, by Channel Group, 2009-2019
Figure 37: Italy Household Products Retail Sales and Forecast (EUR mn), by Channel Group, 2009-2019
Figure 38: The Triangulated Market Sizing Methodology

List of Tables

Table 1: Italy Food and Grocery Retail Sales (EUR mn), by Channel Group, 2009-2014
Table 2: Italy Food and Grocery Retail Sales Forecast (EUR mn), by Channel Group, 2014-2019
Table 3: Italy Food and Grocery Retail Sales (US$ mn), by Channel Group, 2009-2014
Table 4: Italy Food and Grocery Retail Sales Forecast (US$ mn), by Channel Group, 2014-2019
Table 5: Italy Food and Grocery Retail Segmentation (% value), by Channel Group, 2009-2019
Table 6: Italy Food and Grocery Retail Sales (EUR mn), by Category 2009-2014
Table 7: Italy Food and Grocery Retail Sales Forecast (EUR mn), by Category 2014-2019
Table 8: Italy Food and Grocery Retail Sales (US$ mn), by Category, 2009-2014
Table 9: Italy Food and Grocery Retail Sales Forecast (US$ mn), by Category, 2014-2019
Table 10: Italy Food and Grocery Retail Segmentation (% value), by Category, 2009-2019
Table 11: Italy Drinks Retail Sales (EUR mn), by Channel Group, 2009-2014
Table 12: Italy Drinks Retail Sales Forecast (EUR mn), by Channel Group, 2014-2019
Table 13: Italy Drinks Retail Sales (US$ mn), by Channel Group, 2009-2014
Table 14: Italy Drinks Retail Sales Forecast (US$ mn), by Channel Group, 2014-2019
Table 15: Italy Drinks Retail Segmentation, by Channel Group, 2009-2019
Table 16: Italy Household Products Retail Sales (EUR mn), by Channel Group, 2009-2014
Table 17: Italy Household Products Retail Sales Forecast (EUR mn), by Channel Group, 2014-2019
Table 18: Italy Household Products Retail Sales (US$ mn), by Channel Group, 2009-2014
Table 19: Italy Household Products Retail Sales Forecast (US$ mn), by Channel Group, 2014-2019
Table 20: Italy Household Products Retail Segmentation, by Channel Group, 2009-2019
Table 21: Italy Packaged Food Retail Sales (EUR mn), by Channel Group, 2009-2014
Table 22: Italy Packaged Food Retail Sales Forecast (EUR mn), by Channel Group, 2014-2019
Table 23: Italy Packaged Food Retail Sales (US$ mn), by Channel Group, 2009-2014
Table 24: Italy Packaged Food Retail Sales Forecast (US$ mn), by Channel Group, 2014-2019
Table 25: Italy Packaged Food Retail Segmentation, by Channel Group, 2009-2019
Table 26: Italy Tobacco Retail Sales (EUR mn), by Channel Group, 2009-2014
Table 27: Italy Tobacco Retail Sales Forecast (EUR mn), by Channel Group, 2014-2019
Table 28: Italy Tobacco Retail Sales (US$ mn), by Channel Group, 2009-2014
Table 29: Italy Tobacco Retail Sales Forecast (US$ mn), by Channel Group, 2014-2019
Table 30: Italy Tobacco Retail Segmentation, by Channel Group, 2009-2019
Table 31: Italy Unpackaged Food Retail Sales (EUR mn), by Channel Group, 2009-2014
Table 32: Italy Unpackaged Food Retail Sales Forecast (EUR mn), by Channel Group, 2014-2019
Table 33: Italy Unpackaged Food Retail Sales (US$ mn), by Channel Group, 2009-2014
Table 34: Italy Unpackaged Food Retail Sales Forecast (US$ mn), by Channel, 2014-2019
Table 35: Italy Unpackaged Food Retail Segmentation, by Channel Group, 2009-2019
Table 36: Key Food and Grocery Retailers in Italy
Table 37: Italy Exchange Rate EUR-USD$ (Annual Average), 2009-2014
Table 38: Italy Exchange Rate EUR-US$ (Annual Average), 2015-2019
Table 39: Retail Channel Definitions
Table 40: Retail Category Definitions

Order by Fax - using the form below
Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: Food and Grocery Retailing in Italy - Market Summary and Forecasts; Comprehensive overview of the market, consumer, and competitive context, with retail sales value and forecasts to 2019
Web Address: http://www.researchandmarkets.com/reports/3388689/
Office Code: SCPLXDQ1

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Product Formats</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User:</td>
<td></td>
<td>USD 1250</td>
</tr>
<tr>
<td>Electronic (PDF) - Site License:</td>
<td></td>
<td>USD 2500</td>
</tr>
<tr>
<td>Electronic (PDF) - Enterprisewide:</td>
<td></td>
<td>USD 3750</td>
</tr>
</tbody>
</table>

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title: 
Mr ☐ Mrs ☐ Dr ☐ Miss ☐ Ms ☐ Prof ☐
First Name: ___________________________ Last Name: ___________________________
Email Address: * ___________________________
Job Title: ___________________________
Organisation: ___________________________
Address: ___________________________
City: ___________________________
Postal / Zip Code: ___________________________
Country: ___________________________
Phone Number: ___________________________
Fax Number: ___________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:

Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:

Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: __________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:

(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World