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GERMAN ONLINE GROCERY REPORT 2022

Ultimate Overview of **Online Food** **Retailing in** **Germany** in 2022 and Beyond

A study on customer buying behavior,
brand perception, and the role of
technology



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Introduction

Depending on how it is defined, Germany's food and grocery retail sector covers annual sales volumes of between €220 and €300 billion. It is easily Europe's largest market and home to some of the continent's biggest food retailers, including the discount supermarket companies who revolutionized food shopping both at home and abroad and have made Germany a strongly competitive and price-sensitive market. Yet the disruptors of yesterday are now facing disruption. As a new generation of online grocers, both from within Germany and elsewhere, uses innovation-hungry urban markets such as Berlin and Munich to test new concepts and early-movers are rolling out winning formulas across the country, the prospect of a major shift on home turf is coming within reach.

As this study shows, a majority of consumers in Germany, both urban and suburban, is now aware of a variety of options for ordering groceries online, and many are already using them to a certain extent. Importantly, a not insignificant minority has already switched to doing the bulk of their shopping on the internet – with many more who can envision doing so in the next two years. Even if 2021 online food sales, at around €4 billion,¹ made up a markedly smaller proportion of the total market than in broadly comparable countries such as France or UK,² this figure represents growth of around 30% on 2020, and projections for 2022 suggest sales topping €5 billion.

¹ Bundesverband E-Commerce und Versandhandel (BEVH) | ² [Handelsdaten.de](https://www.handelsdaten.de)

So while Germany remains, on a range of key indicators, behind its European neighbors in terms of online food shopping habits, it is catching up rapidly. And due to its size and geographical location, when it comes to online groceries, what happens in Germany will be crucial to how the sector develops in Europe as a whole. Drawing both on our expertise in online groceries and the most comprehensive market research in Germany currently available, this report provides an overview of the 2022 status quo in online groceries in Germany, offers some recommendations for market participants, and makes essential reading for anyone trying to understand what is happening in this fast-moving sector.

About the research

In a representative nationwide survey, Appinio asked 2,500 end consumers a range of detailed questions about their experiences of online grocery shopping to date and their opinions regarding it.

The result is the largest and most detailed set of data currently available about online food shopping habits in Germany. This dataset was collated by Appinio in cooperation with Spryker.

Survey participants were between 16 and 65 years of age (average age: 40.9) and lived in Germany at the time at which they took part; 42.8% lived in towns or areas with fewer than 50,000 inhabitants, while 19.6% were resident in the country's largest cities (population in excess of 500,000).

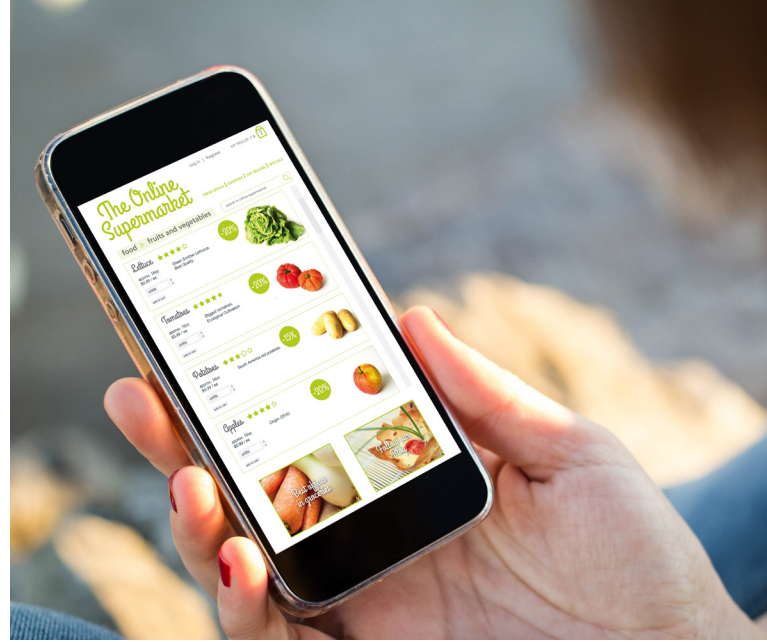
Respondents answered in January 2022. A comparable survey with the same sample size and make-up was carried out in June 2021.



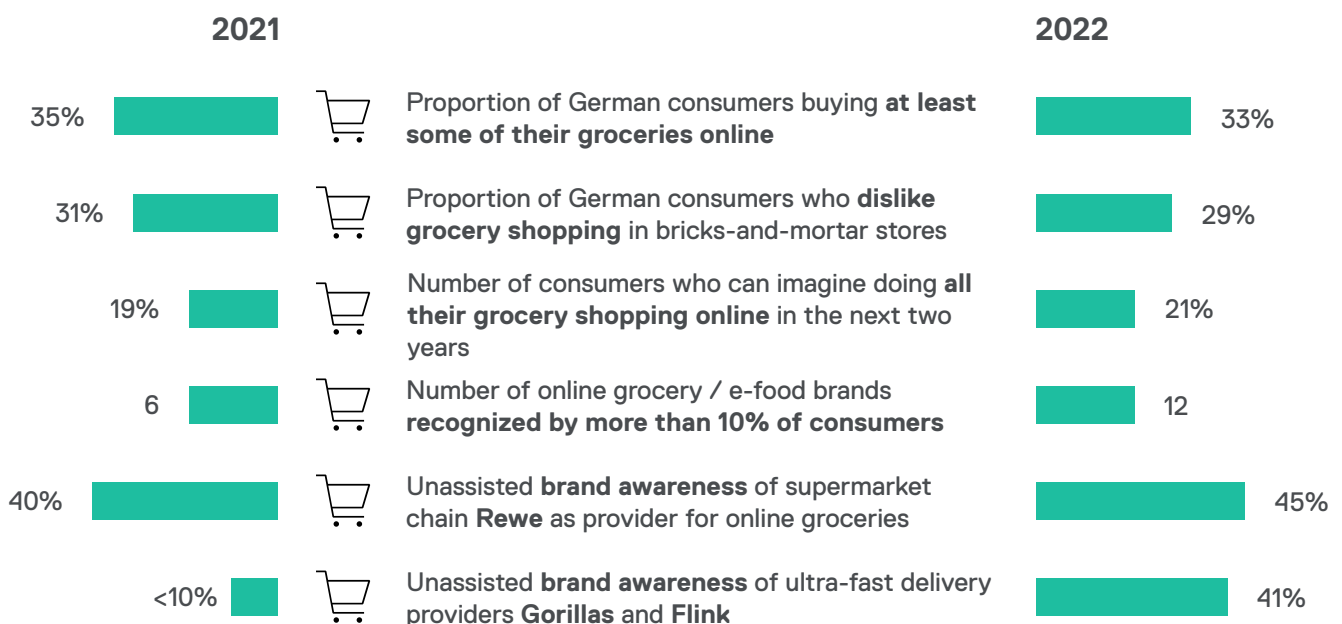
[Open dashboard with entire data set](#)

Chapter 1: Changes since 2021

The first Appinio-Spryker online grocery market research survey was conducted in summer 2021 – just six months prior to this 2022 edition. Yet in a market as dynamic as online groceries, even a relatively short period can see noticeable shifts. Here is a brief overview of the most striking changes – and continuities – over the past six months.



- **Market size:** The last six months have seen the proportion of German consumers buying at least some of their groceries online remain stable at around one third (2021: 35%, 2022: 33%).
- **Supermarket blues:** Even as other areas of bricks-and-mortar retail enjoy a post-pandemic return to popularity, one third of German consumers still dislike supermarket shopping (2021: 31%, 2022: 29%).
- **Future habits:** Since the last survey, there has been a slight increase in the number of consumers who can envision doing all of their grocery shopping online within the next two years (2021: 19%, 2022: 21%).
- **Brand awareness:** In June 2021, only six brands were recognized by more than 10% of survey participants. In January 2022, this figure had doubled to 12.
- **Rewe's renown:** At 45%, the online service provided by supermarket chain Rewe remains the one which most Germans can name unaided. This is up somewhat from 40% six months ago. Aided recognition is as high as 75%.
- **Gorillas' growth:** On demand grocery providers with ultra-fast delivery times have become household names in just six months. In June 2021, less than 10% of respondents knew Gorillas and Flink; now, these figures have jumped to 41% and 36% respectively, in large cities even close to 60%.



Chapter 2: Comparison to US market

Prior to research into the German market, the most recent Appinio-Spryker online groceries survey was conducted in autumn 2021 in the United States. As a more mature e-commerce market, the USA makes an interesting point of comparison (and potential future scenario) for German food retail.

- **Supermarket blues II:** While one third of Germans dislikes grocery shopping, an even higher proportion of American consumers (45%) sees in-store as an unwelcome chore.
- **Higher penetration:** Similarly, while one third of Germans is already buying some food online, in the USA, this figure is already running at 47%.
- **Pricing issues:** 37% of Americans say they find online groceries offer deterrent, and almost 80% of consumers would up their ordering if prices were lower.
- **Recognition paradox:** Like Gorillas et al. in Germany, US on-demand grocery services such as DoorDash and Grubhub have high rates of brand recognition paired with comparatively low take-up.
- **Incumbent advantage:** In another market parallel, bricks-and-mortar incumbents who offer full supermarket service online are leading the market: where Costco, Walmart, and Kroger are storming ahead in the US, Rewe in Germany is turning its offline strength into online pole-position.
- **Similar motivations:** In both markets, the reasons most often cited for shopping online were a lack of time and laziness. And in both the US and Germany, around one third of respondents is still avoiding supermarkets out of fear of contagion.
- **Weekly shops:** More than one in four US online consumers is already ordering their whole weekly shop; in Germany, this figure is still at one in five. US online shoppers are also spending more: one third spends over \$100 per week, and 7% even more than \$200. In Germany, only 13% spend €100-200, and 3% more than €200.



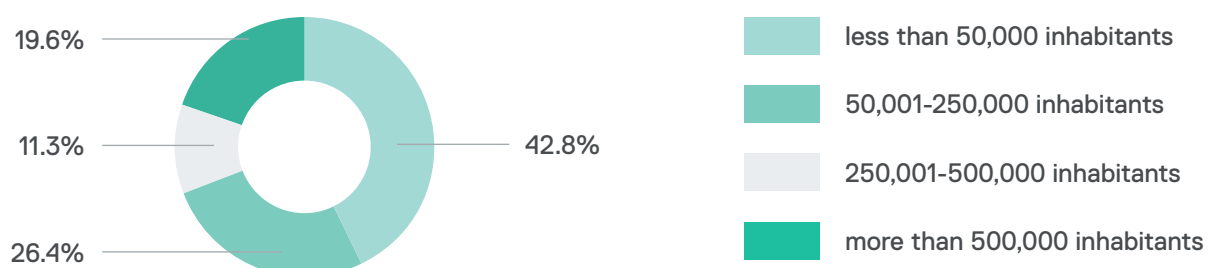


Chapter 3: Consumer preferences and behavior

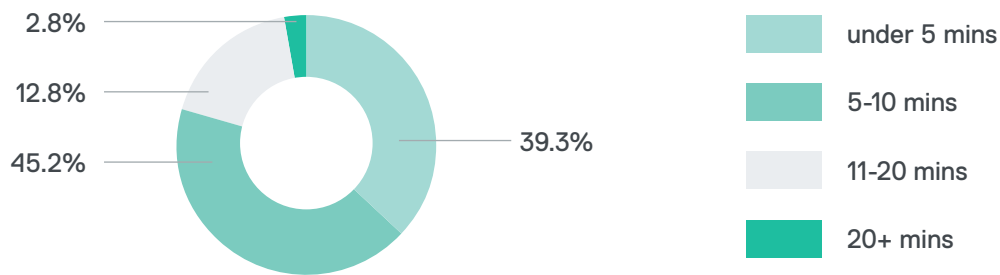
On the surface, German food retail is doing fine as it is. In one of Europe's best served markets, two in five respondents (39.3%) lives under five minutes away from a supermarket, and another two in five (45.2%) is within 10 minutes' reach; only 2.8% of respondents are further than 20 minutes away from a grocery store run by a major food retailer.

What is more, seven in ten respondents have an overall positive view of supermarket shopping. In other words, the average German consumer can get to a supermarket in less than ten minutes and also enjoys shopping there. For anyone looking to explain why internet sales are still at around 2%-3% of the total German food and grocery market while countries such as France, UK, the Netherlands, and the Czech Republic are all at or approaching 10%, this looks like your answer.

How many inhabitants live in your place of residence?



How far away is the grocery store you shop at most often?



Yet on closer inspection, under this apparently placid surface, things are changing in Germany. The strong existing infrastructure and overall high levels of satisfaction are masking a groundswell which is already provoking tangible shifts – and is likely to lead to unexpectedly rapid realignments with the next two years.

High coverage, high satisfaction – and restlessness

Firstly, there is the obvious point that, while seven in ten consumers may be broadly satisfied with supermarket shopping, three in ten do not enjoy it at all. Yes, **29.3% of respondents think of buying groceries as an unpleasant experience** – a fig-

ure which has only dropped minimally from the 31% recorded in June 2021, when the perceived threat from CoVid-19 was still causing many Germans to avoid shops. As such, there is every reason to assume that roughly one third of German consumers dislike supermarket shopping regardless of whether there is a worldwide pandemic in progress and are therefore amenable to ways of avoiding it in the long term.

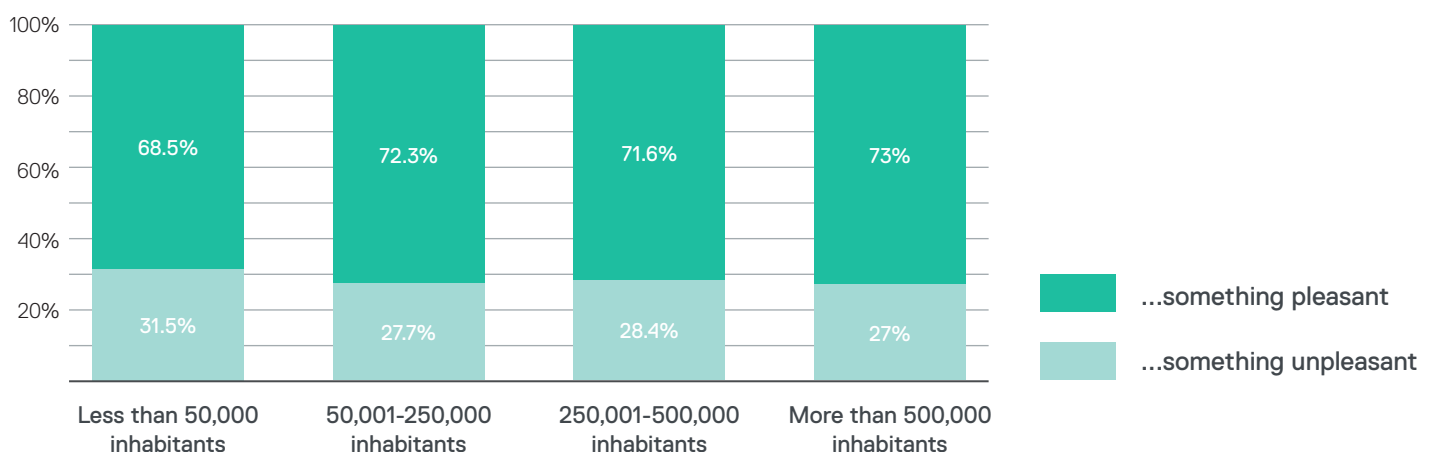
So it shouldn't be surprising that this figure corresponds to within a few percentage points with another: **33% of respondents are already buying at least some food online**. In other words, one third of German consumers dislike supermarket shopping and one third of Germans are now using online grocery services to a certain extent.

The coverage paradox: more supermarkets, more online shoppers

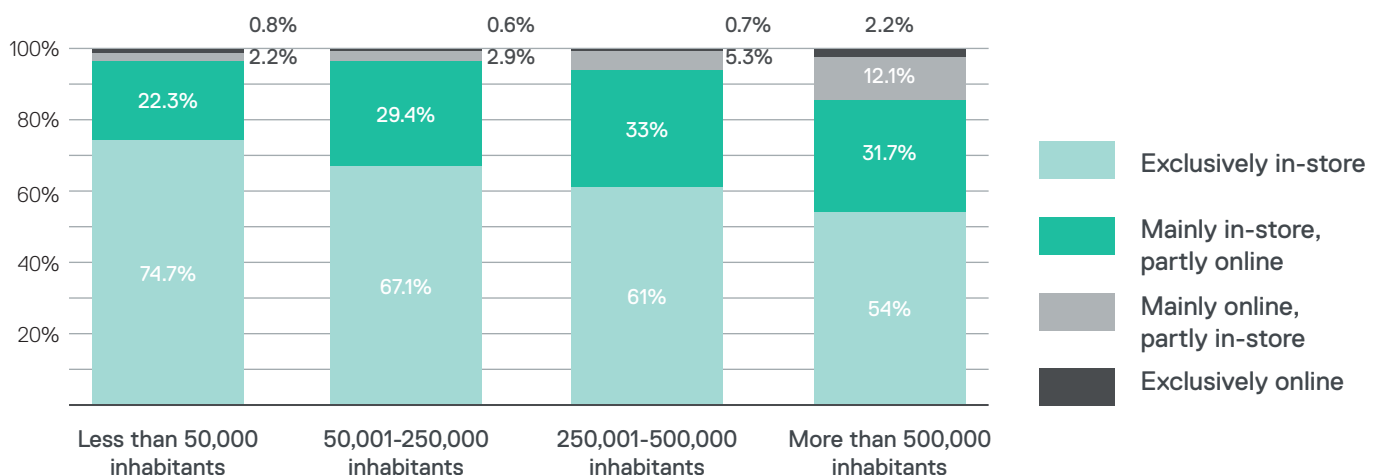
Looking at the data in detail reveals a paradox which should be of particular concern to supermarkets. Customer satisfaction is highest in Germany's largest cities, where a full 73% of respondents rated food shopping as a pleasant experience and only 27% replied that they disliked it; meanwhile, only 68.5% of survey participants li-

ving in smaller towns and rural areas said that they enjoyed supermarket visits, and 31.5% replied that they found them unpleasant. Given the high level of coverage in Germany's top-tier urban areas, this is perhaps unsurprising: few inhabitants of cities like Berlin or Hamburg are further than five minutes away from a Rewe, Edeka, or Penny store.

For me, grocery shopping at a grocery store is...



How do you currently buy your groceries?



Yet it is precisely in these urban areas full of apparently satisfied supermarket shoppers that rates of online uptake are highest: **12.1% of respondents in cities with a population of over 500,000 are already doing the bulk of their food shopping online** – more than double the figure for the next tier down (250,000-500,000) and several times higher than in smaller towns. Indeed, almost three quarters (74.7%) of respondents from places with fewer than 50,000 inhabitants are still doing all of their food shopping in bricks-and-mortar stores, while **only half (54.0%) of respondents in top-tier cities are still buying all of their groceries offline.**

The paradox is striking: the higher the levels of satisfaction with supermarket shopping and the higher the density of supermarket stores, the higher the percentage of customers going online. There is a simple explanation for this apparent contradiction – there are still comparatively few online grocery services available in smaller towns and rural areas – and a conclusion to be drawn: if there were more options outside of urban areas and medium-sized cities, dissatisfied supermarket shoppers in smaller towns would likely switch to them.

Future habits: younger customers, higher online spends

For now, of course, online grocery shopping remains a primarily urban phenomenon – and in Germany's largest cities, every second respondent is already buying some food online. Moreover, in yet another worrying development for supermarkets, the younger the online grocery shopper, the higher the percentage of their household budget spent ordering shopping for home delivery.



Distribution of household's food spending in the last 6 months per channel and age group

	Total	16-24 year olds	25-34 year olds	35-44 year olds	45-54 year olds	55-65 year olds
In-store / bricks-and-mortar grocery stores	81.6%	81.6%	75.9%	77.2%	84.4%	87.9%
Online with click & collect / BOPIS	6.3%	6.7%	8.4%	7.7%	5.3%	3.8%
Online with delivery	9.2%	8%	11.7%	11.2%	8.4%	6.9%
Other channels	2.9%	3.7%	4%	4%	2%	1.4%

It is striking that, in the 25-34 and 35-44 age brackets, respondents who shop online were already spending almost 20% of their food budget in this channel, with over 10% on orders with home delivery; in-store collection is clearly second choice. These working-age households, hard-pressed for time yet with good levels of disposable income, are a key demographic – and are discovering the convenience of having food shopping delivered to their doors. Indeed, 47.9% of survey participants who order online state a lack of time as their primary motivation.

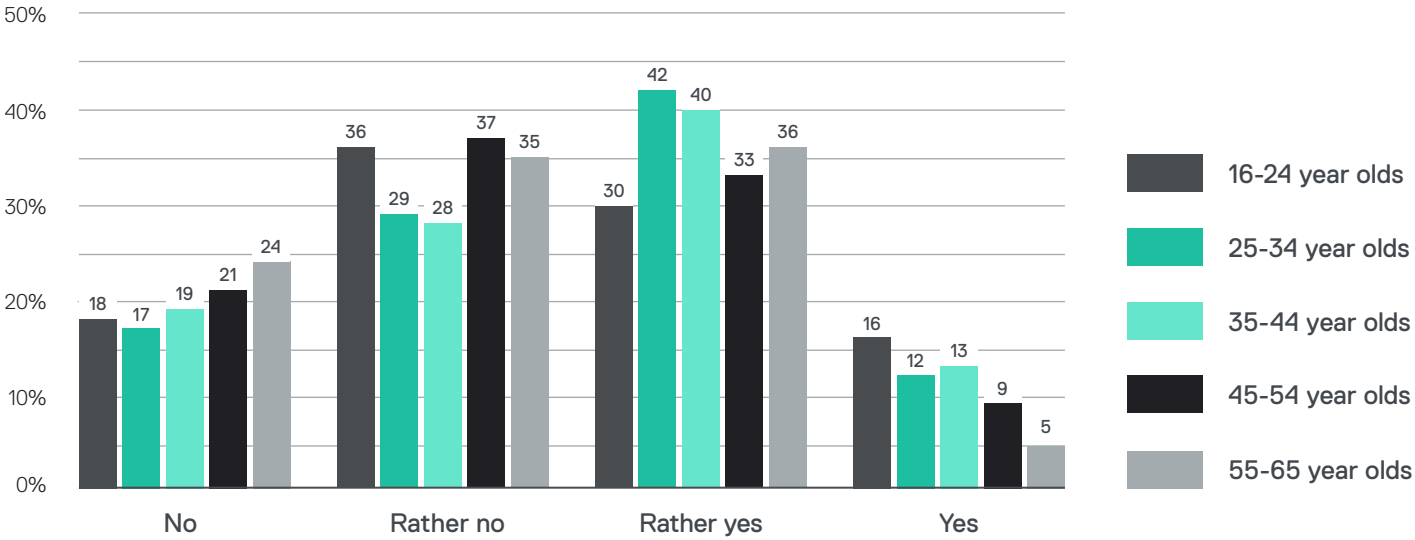
The size of the shift ahead becomes clear when respondents who do not yet shop for food online were asked whether they would, in principle, consider ordering groceries on the internet: the percentage of those who answered yes (“definitely” or “quite possibly”) was, at over 50%, highest in the 25-44 brackets.

The clearest explanation for this is family set-up, as households with at least one under-18 which do already order online also reported above-average spends in the channel. Working parents are notoriously busy, so it is perhaps unsurprising that having their groceries delivered instead of queuing at the local supermarket is a particularly attractive prospect for this demographic. Whatever the

case, across all age brackets, a high percentage of those who do not yet do so can envisage ordering at least some of their food shopping online in the future: in total, 46.6% of respondents answered “quite possibly” or “yes”.



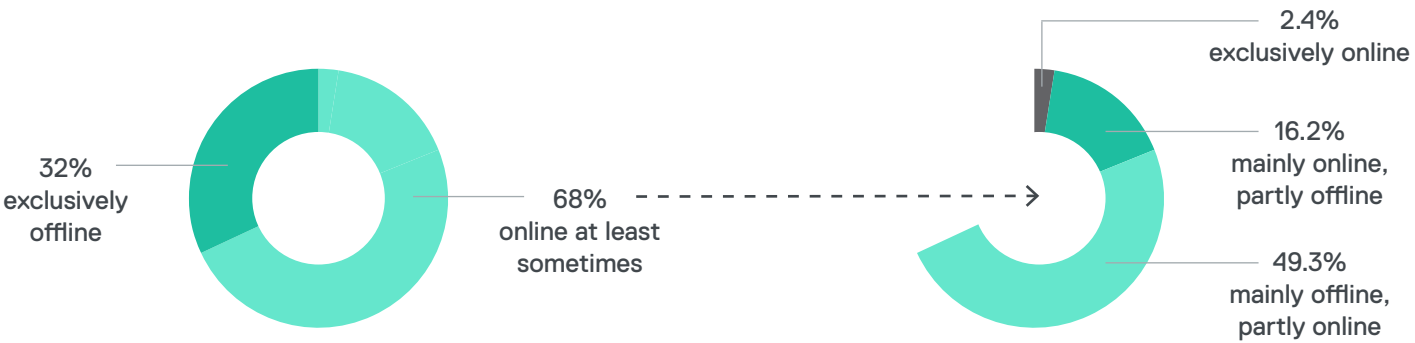
Proportion of offline-only shoppers per age group considering online purchases in the future



There is, of course, a difference between being potentially willing to shop for food online and actually moving relevant proportions of household spending into this channel. Yet even when the question is phrased more specifically, there is an undeniable shift ahead: when asked how they see their food shopping in two years, only one third (32%) of all

respondents answered that they would not be doing any food shopping online, while a full half (49.3%) see at least some of their spending going online; **almost one fifth see the majority or all of their grocery shopping having gone online by 2024** (16.2% mostly, 2.4% exclusively online).

How do you envision your grocery shopping in two years?



Online spending: more than just occasional treats

As the old saying goes, the trouble with first impressions is that you only get to make one. And the fact that it was companies like Gourmondo and Foodist who scored early successes in food

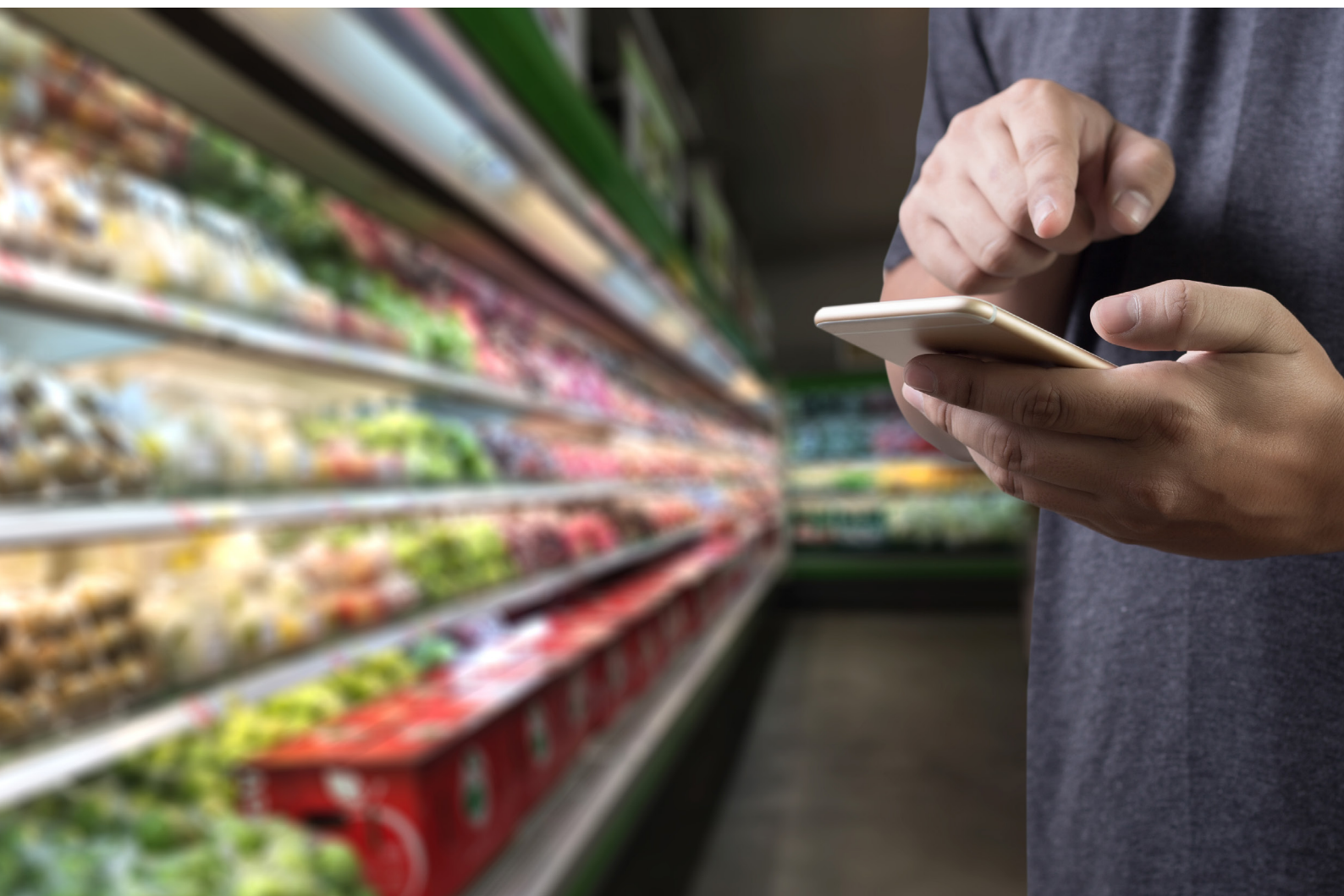
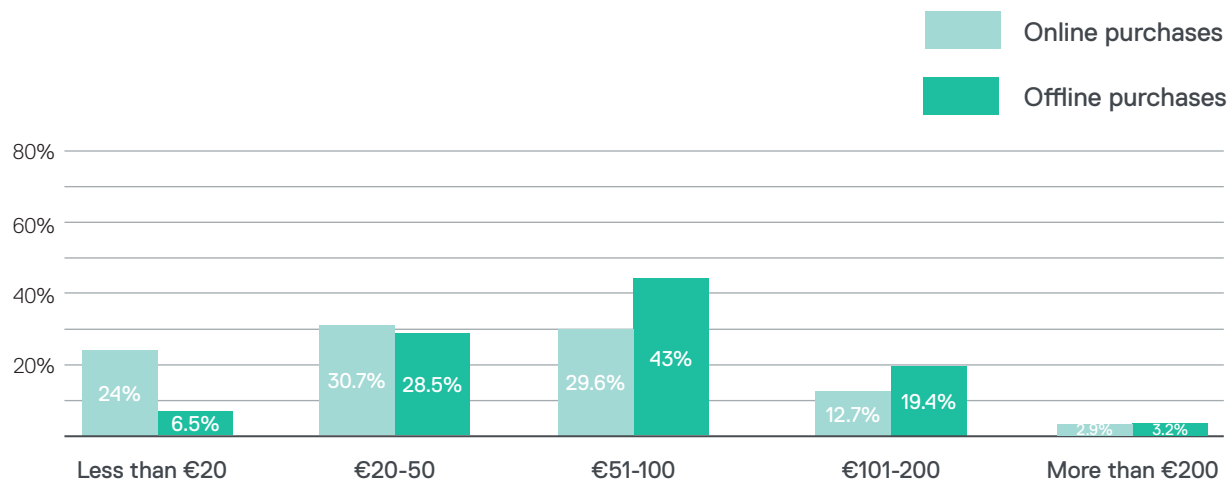
e-commerce in Germany led many to assume that online ordering would, at best, be confined to niche products ideal for parcels shipping and

intended as gifts or treats (e.g. pricey gourmet preserves, exotic dried herbs and spices, vintage wines). This is, of course, no longer the case.

Consumers who buy food online are now buying standard supermarket items, and in some cases

doing some or all of their weekly shop on the internet. This is reflected in our survey results by the fact that, of those who already do some grocery shopping online, **60.3% report spending between €20 and €100 per week in this channel.**

Average spending per week on groceries per channel



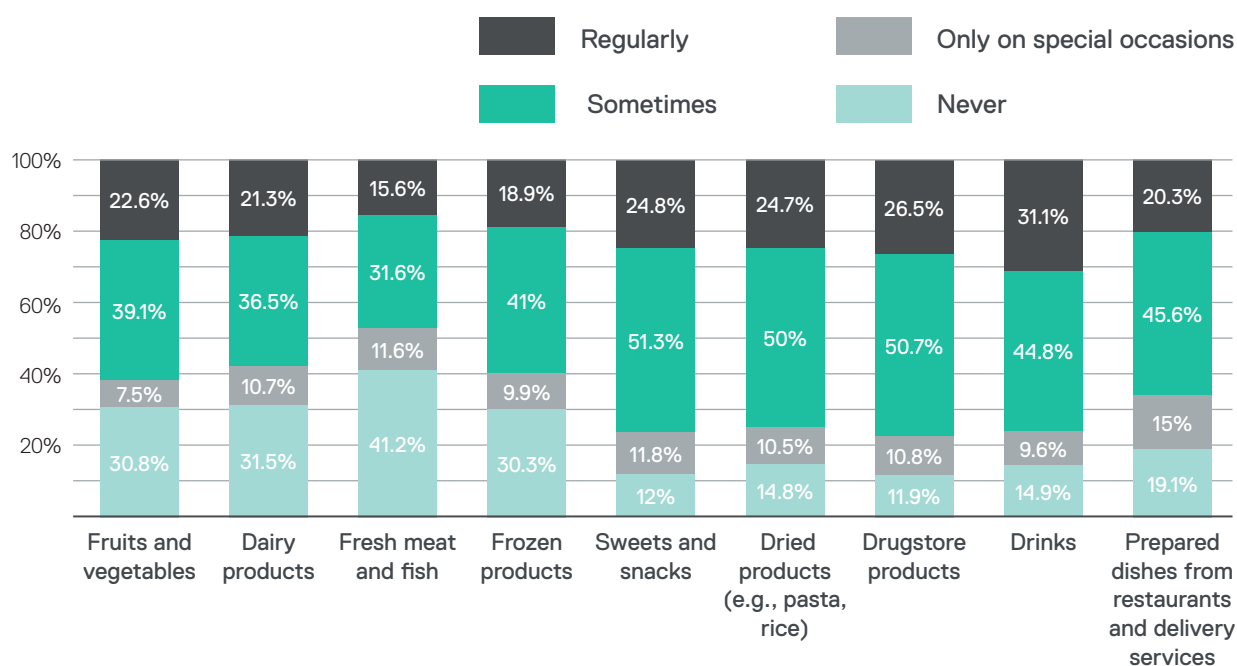
Given that the average supermarket shop in Germany comes in at around €20,³ this is a clear indication that ordering food online is, for those who do it, more than just a matter of buying occasional extras; rather, it is replacing at least one in-store shopping trip.

As such, it is particularly striking to view reported spending online in comparison to offline. While the percentage of respondents who estimate their weekly spend in stores, at markets etc. is, at between €51 and €100, still markedly higher than those who report this level of spending online (42.8%, to 29.6% respectively), there is already near-parity in the €20-€50 bracket (30.7% to 28.5%). In other words: **households who do some**

grocery shopping online are already spending comparable sums there to offline.

This is backed up by what these households report buying, with a full range of products landing in virtual baskets. The only category in which more than a third of online shoppers had not yet ordered was fresh meat and fish, with around 30% also reporting that they had never bought fruit and vegetables, dairy, or frozen goods online. If those percentages sound high, it's worth reversing the perspective: two thirds of households who buy at least some groceries on the internet have already placed orders in categories long considered to be the least amenable to e-commerce.

Which of the following product categories do you buy online?

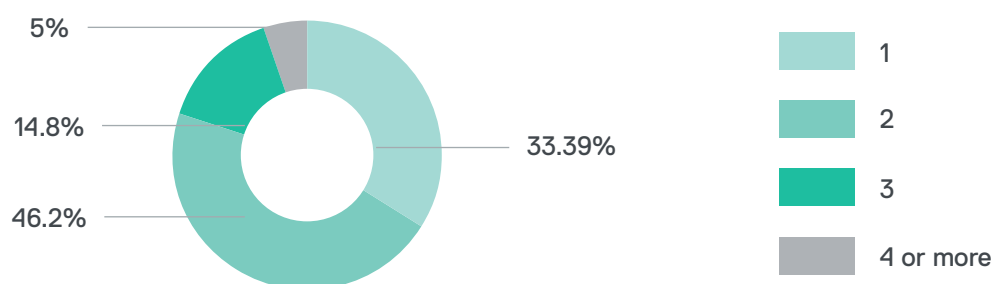


So while regular orders were certainly highest in beverages – quite possibly the “Flaschenpost effect”, combined with long-established online wineries – the stubborn idea that consumers are overly-wary of ordering perishables and essentials on the internet is not backed up by the data. If

anything, ordering in categories where freshness and selection is less important and products more standardized (drinks, dried goods) probably leads consumers up the scale towards the most challenging categories previously considered the preserve of in-store providers.

³ de.statista.com

How many different platforms / services do you use to order groceries online?

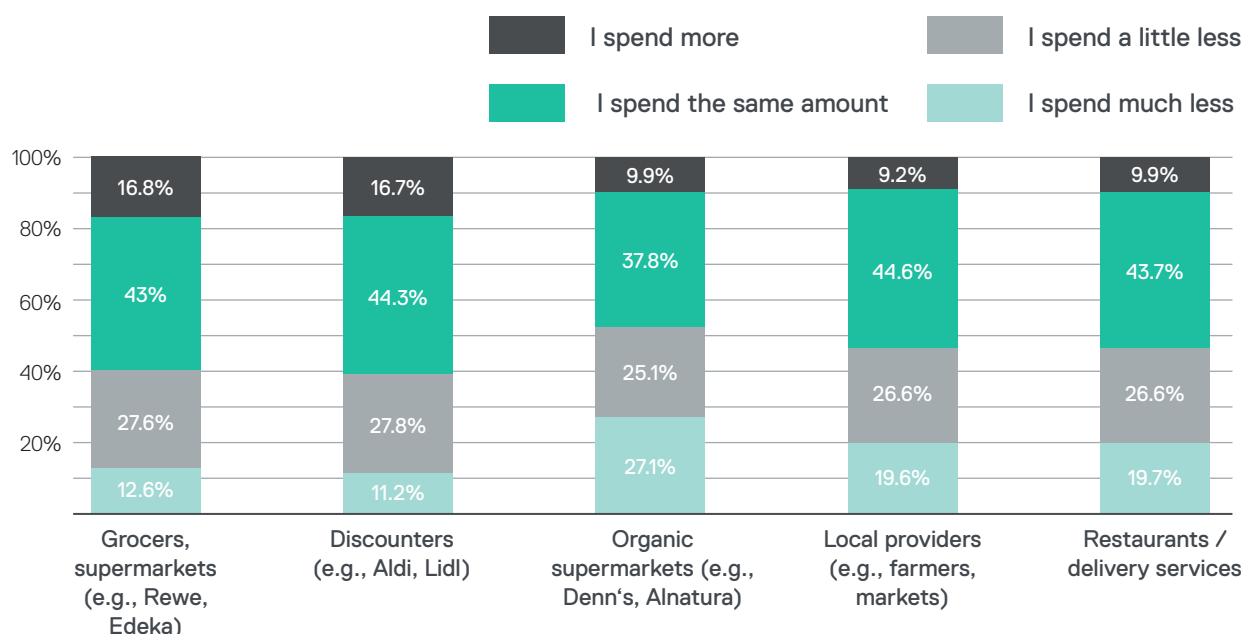


This hypothesis is supported by the fact that **almost a half (46.2%) of online shoppers are already ordering from two providers**: it is easy to imagine households starting with a supplier offering drinks delivery, dried goods, or specialty products and then adding a full-service online supermarket once convinced of the benefits of online. Nevertheless, consumers remain marginally less willing to order fresh food on the internet and (as we shall see in the last section of this report) are not yet entirely convinced by the product quality online grocers deliver.

Online consumption: unexpected effects offline

A somewhat surprising result of the survey confirms that online grocery shoppers are not just bulk-buying dried goods or taking advantage of attractive wine deals. When asked which type of food retailer lost out when they spent more than usual online, **27.1% of respondents reported heavy cuts to their spending in organic supermarkets, and another 19.6% at their local farm shops and open-air markets**; only 12.6% reported noticeably cutting their spending in supermarkets and only 11.2% bought markedly less at discounters.

If you buy more groceries online than usual in a given month, how does that impact your purchases at other channels and providers?



This is unexpectedly good news for the likes of Rewe and Edeka, ALDI and Lidl – and surprisingly bad news for chains such as Denn’s or Alnatura, as well as for small-scale growers and stall-holders. It also puts paid to a stereotype held in many quarters that those who order their groceries online are not particularly concerned with quality, freshness, and ethics. Quite clearly, there is more crossover than many would have predicted between the kind of principled consumer who places a premium on organic or regional produce and the kind of consumer willing to order foodstuffs on the internet – and then spend less at their existing providers.

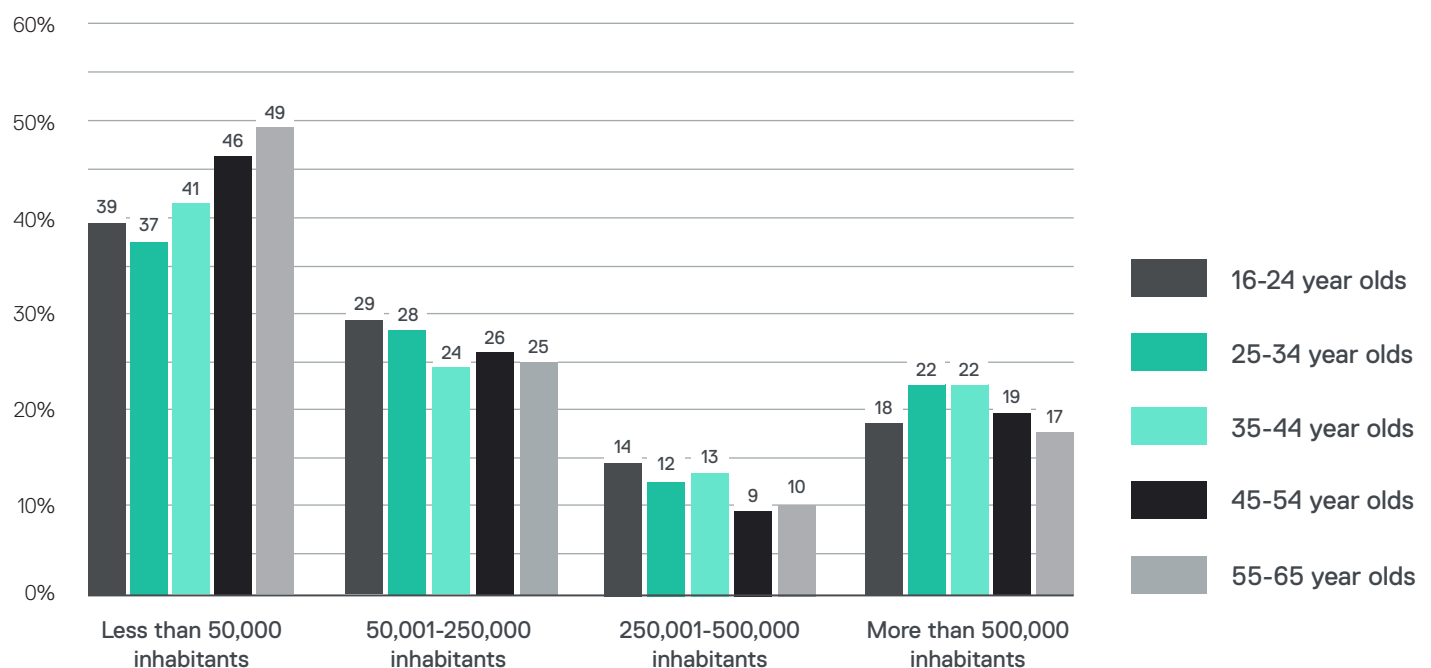
Older consumers: less common, but more intensive?

Although they represent the smallest group of online shoppers at present and, in terms of their reported intent, are the least likely to start buying groceries online in the foreseeable future, it’s worth taking a brief look at older consumers. For

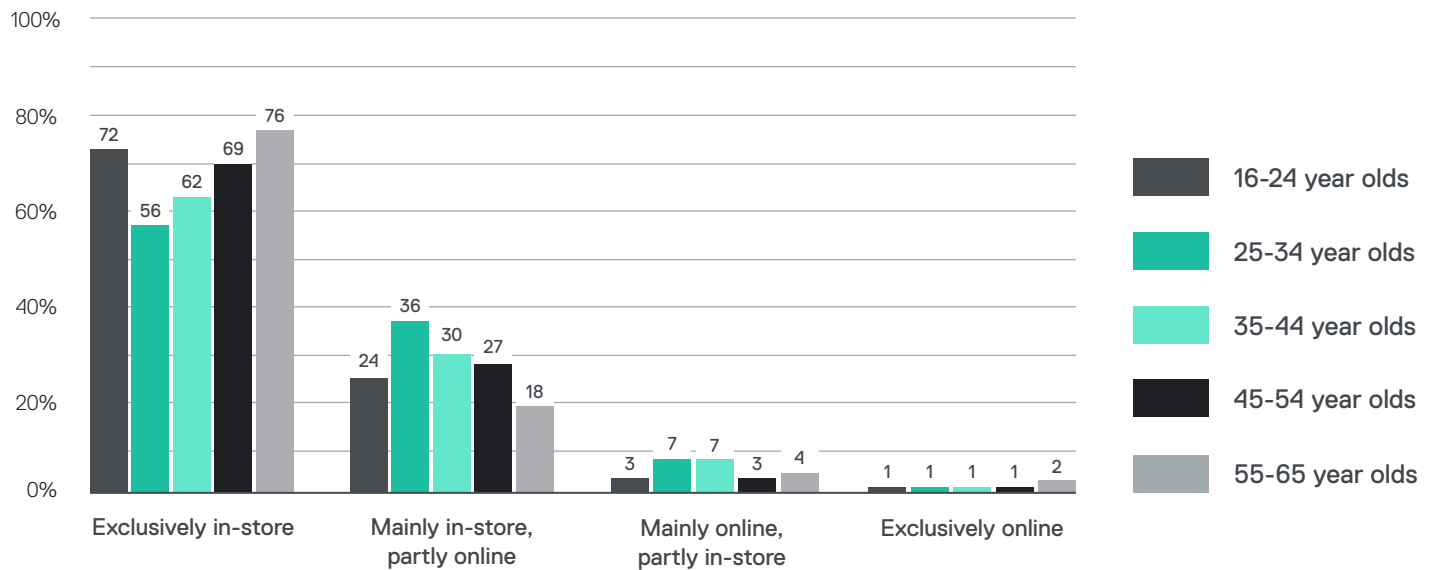
a start, **one clear reason why senior citizens are under-represented among online grocery shoppers is that they are the most likely to live in the smaller towns and rural areas** not served by them – and least likely to live in a major city with over 500,000 inhabitants. While older consumers are naturally less predisposed to e-commerce than younger demographics, they are no longer strangers to shopping online and so may, in many cases, simply be lacking a suitable proposition in the groceries segment.



How many inhabitants live in your place of residence?



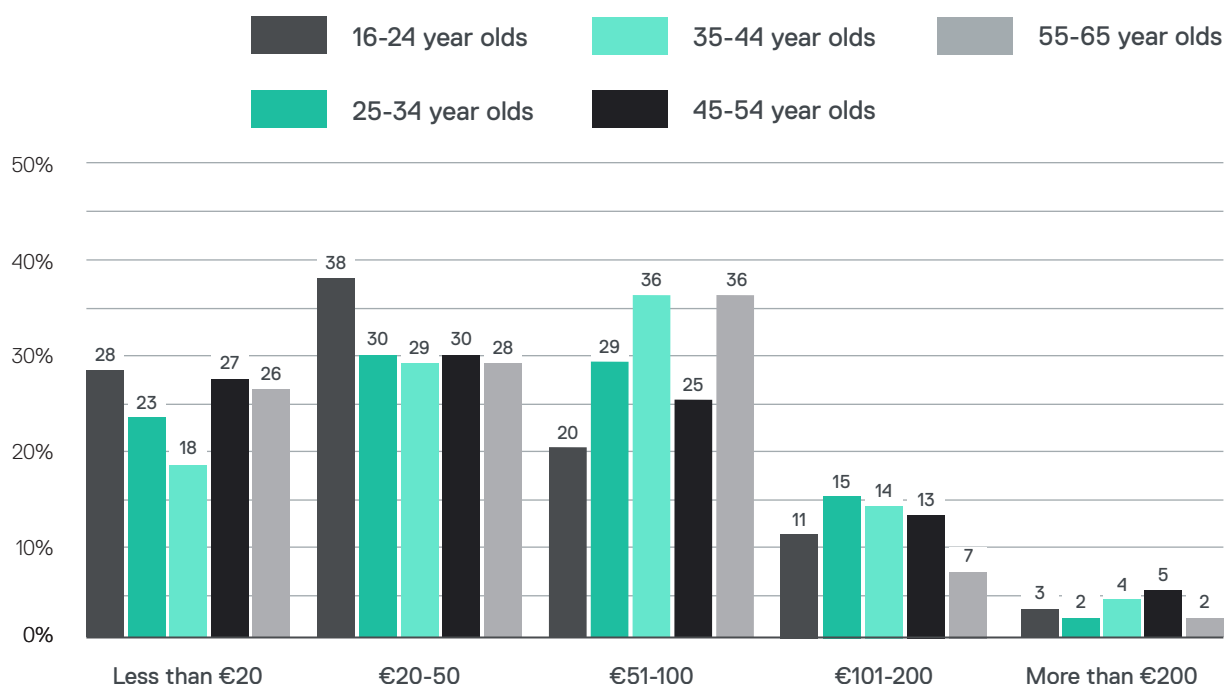
How do you currently buy your groceries?



Regardless of the reasons, currently, only 24% of 55-65-year-olds shop for groceries using the internet, whereas penetration is running at 44% in the 25-34 demographic and at 38% in 35-44. However, **27% of 55-65-year-olds find supermarket shopping unpleasant** (only marginally fewer than in younger age groups) and **41% of respondents in the 55-65 age bracket who do not yet buy groceries online might be willing to do so in the future.**

And when consumers in this age group do start to buy online, the survey results indicate that their spending easily matches, if not exceeds that of younger age cohorts: when it comes to weekly outgoings, a full **65% of online customers in the 55-65 age bracket report spending €20-€100 weekly, drawing even with the 35-44-year-olds** to outspend all other age groups.

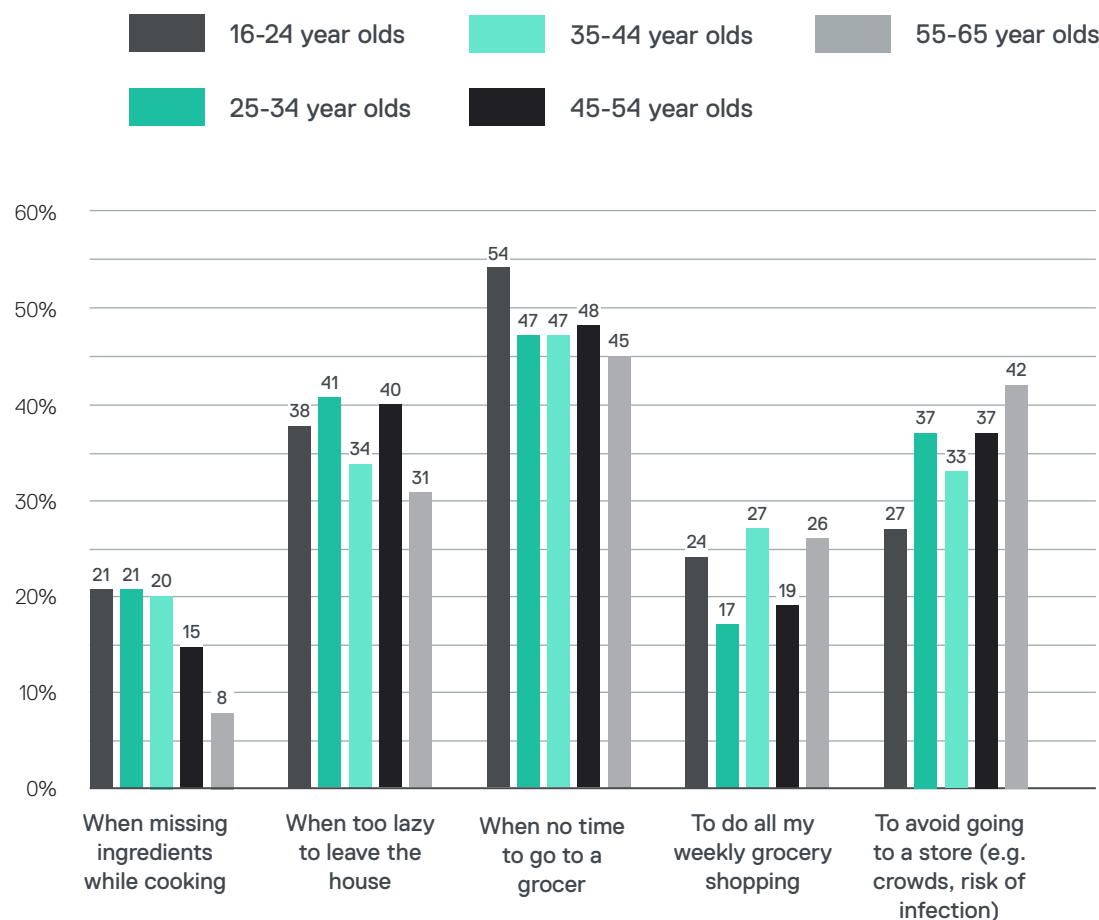
How much do you spend on average per week on groceries you order online?



Interestingly, the two primary motivations behind online ordering among older consumers are a lack of time and the desire to avoid crowded supermarkets and thus minimize the risk of contracting Coronavirus. The former confirms that 55-65-year-olds are, as working lives grow longer and people remain active at older ages, just as busy as younger cohorts and therefore potentially just as receptive to concepts which free up

leisure time. The latter indicates that, as part of a risk group in the pandemic, some older customers have discovered the public-health benefits of no-contact shopping solutions. As such, **avoiding crowded spaces and minimizing health risks was cited most frequently by this age group as a reason for buying groceries online rather than in supermarkets.**

When do you order groceries online?



Consumer profiles: who are Germany's online grocery shoppers?

Taken together, these insights about consumer preferences and behavior in the Germany allow us to draw some conclusions about who in Germany is already doing at least some food shopping online – and who is most likely to do so in the near future.

The **average person ordering groceries online in Germany is aged 25-44 and lives in one of the country's major urban areas** – or, increasingly, one of its numerous medium-sized cities. It is quite likely that this person will have children and

a busy professional and private life. They probably have a degree-level qualification and relatively **high household income**; they will also have a **preference for high-quality and regional products** where possible – a preference **balanced by time-constraints and the need for convenience**. This person places **at least one order for online groceries a week, spending on average €50-€60, and prefers to have orders delivered rather than to collect them in-store**. This is unsurprising given that their orders are most likely to contain **drinks and bulky dried goods**; it is, however, increasingly probable that their orders will also feature **at least some fresh produce**. They are most likely to split their orders between two online providers – potentially one drinks delivery service and one online supermarket.

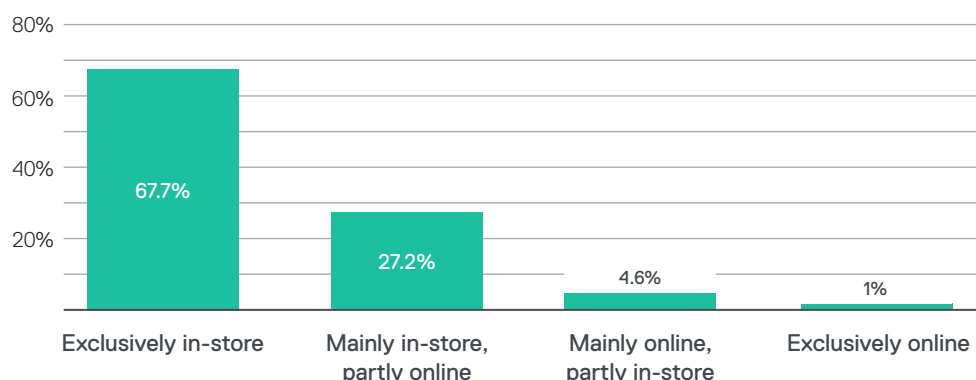
In their friendship group and among acquaintances, this person is still something of a pioneer. However, observing how easy it has become to order high-quality groceries online and have them reliably delivered, people this person knows – other busy professionals; young parents, especially – are already considering ordering at least some of their

weekly shop online and may already be prospecting. And, as the pandemic continued to dominate headlines in Germany throughout the second half of 2021, it is by no means unlikely that this person has helped an older relative to place an order for groceries online – or has promised to do so in the near future.

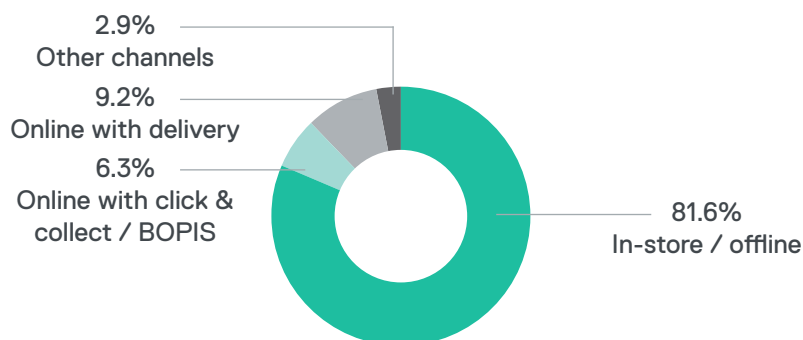
Chapter 4: In-Store supermarket shopping in Germany

Regardless of the approaching shift towards online, it should be stressed that in-store supermarket shopping remains – and will remain – the dominant model in Germany in 2022 and for several years to come. **67.1% of consumers still buy all of their food in offline channels**, the vast majority at supermarkets and discounters, with sizeable minorities also shopping in organic supermarkets or at farm shops and open-air markets. Moreover, when it comes to reported outgoings, **81.6% of respondents' grocery budgets are still being spent offline**.

How do you currently buy your groceries?



How has your household's food spending been distributed among the following channels in the last 6 months?

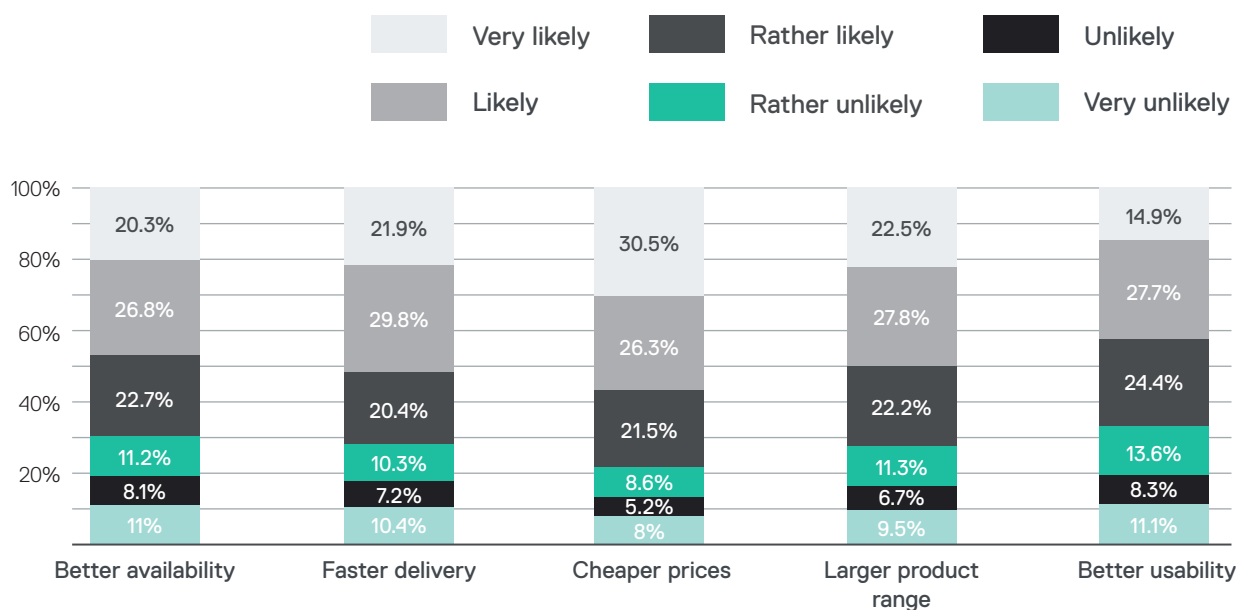


This tallies with the high **overall degree of satisfaction with supermarket shopping (70.7%)**, and there has been no marked decline in any of these figures since the last survey. So supermarkets must be doing something right – or, at the very least, online challengers are still not getting some things right enough to lure away a larger proportion of the 46.4% of consumers who still shop wholly offline, but can imagine ordering at least some of their groceries on the internet in future.

Price remains key in Germany

Here, the survey offers some interesting insights. When asked, for instance, what online grocery providers could do to make them start ordering online or increase their existing online spend, almost one third of respondents said that lower prices would be very likely to have that effect (30.5%) – a far greater proportion than for a larger product range (22.5%), fast delivery (21.9%), and better local availability (20.3%). In total, almost **four in five survey respondents (78.3%)** stated that lower prices would, to some degree of probability, increase their online spend or motivate them to start ordering online.

How likely are the following to motivate you to order food online (more often)?



It is an established fact that German consumers are price-conscious, valuing savings over convenience and experience. Nevertheless, for 50% of respondents, a broader online range would be likely to change their ordering behavior. Furthermore, **smoother online usability would encourage 43% of survey participants to order groceries online** – a figure which increases once customers have started using the internet to buy food. Out of those already ordering online, 67% would up their spend if the product range were broader and 61% would do so if the user interface were improved.

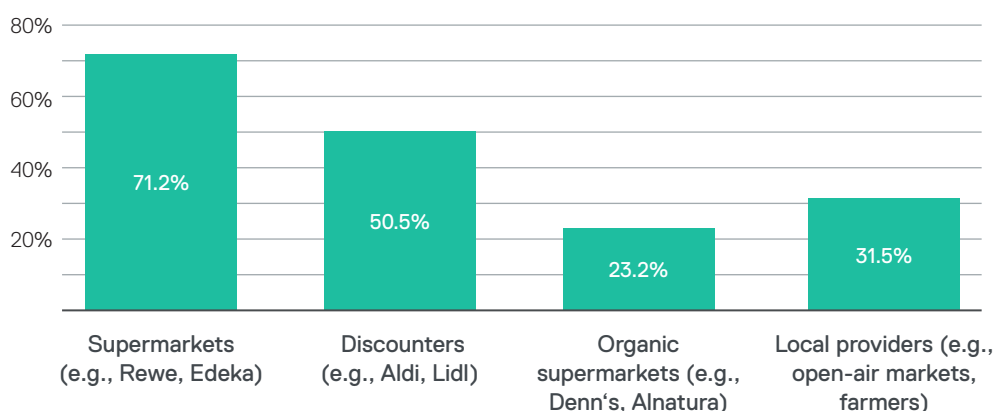
So while the survey results, on the surface, confirm the rationale of discounters such as Lidl and ALDI focussing on the lowest-possible prices and neglecting online initiatives, in detail, they show that a significant proportion of consumers can be converted

to ordering groceries – or to increasing their spending in this channel – by improvements to factors such as pricing, availability, and user experience.

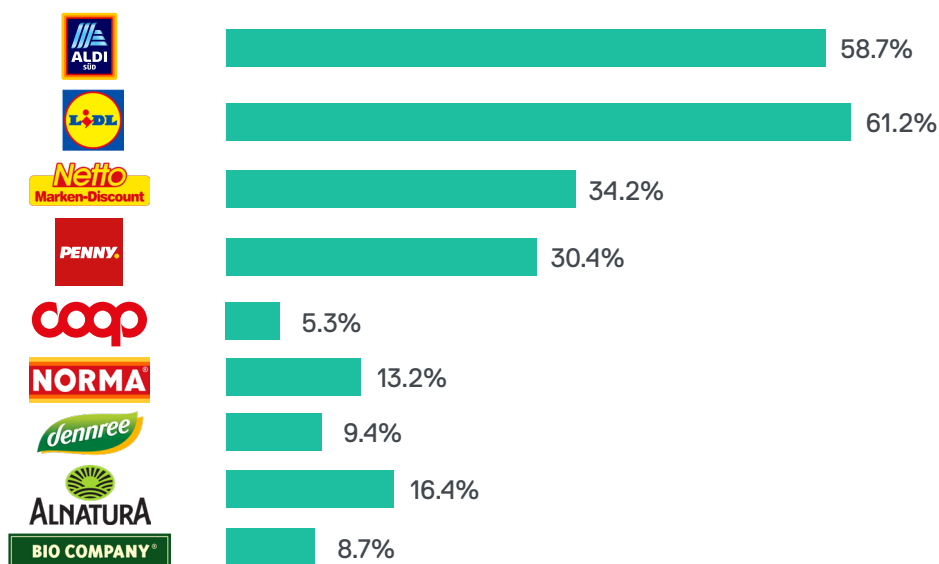
German consumers are more loyal to price than channels

As such, discounters and supermarkets would be wrong to assume that outclassing online grocers on price is the silver bullet that will allow them to avoid investing in e-commerce indefinitely. Another interesting survey result is that **71.2% of respondents would like a supermarket ordering option in their local area and 50.5% would also like to see discounters offering deliveries.** This is far ahead of figures for organic supermarkets (23.2%) and local producers (31.5%).

For which category of vendors do you think an online grocery ordering offer is best?



Which company would you like to see offer online grocery / e-food options?

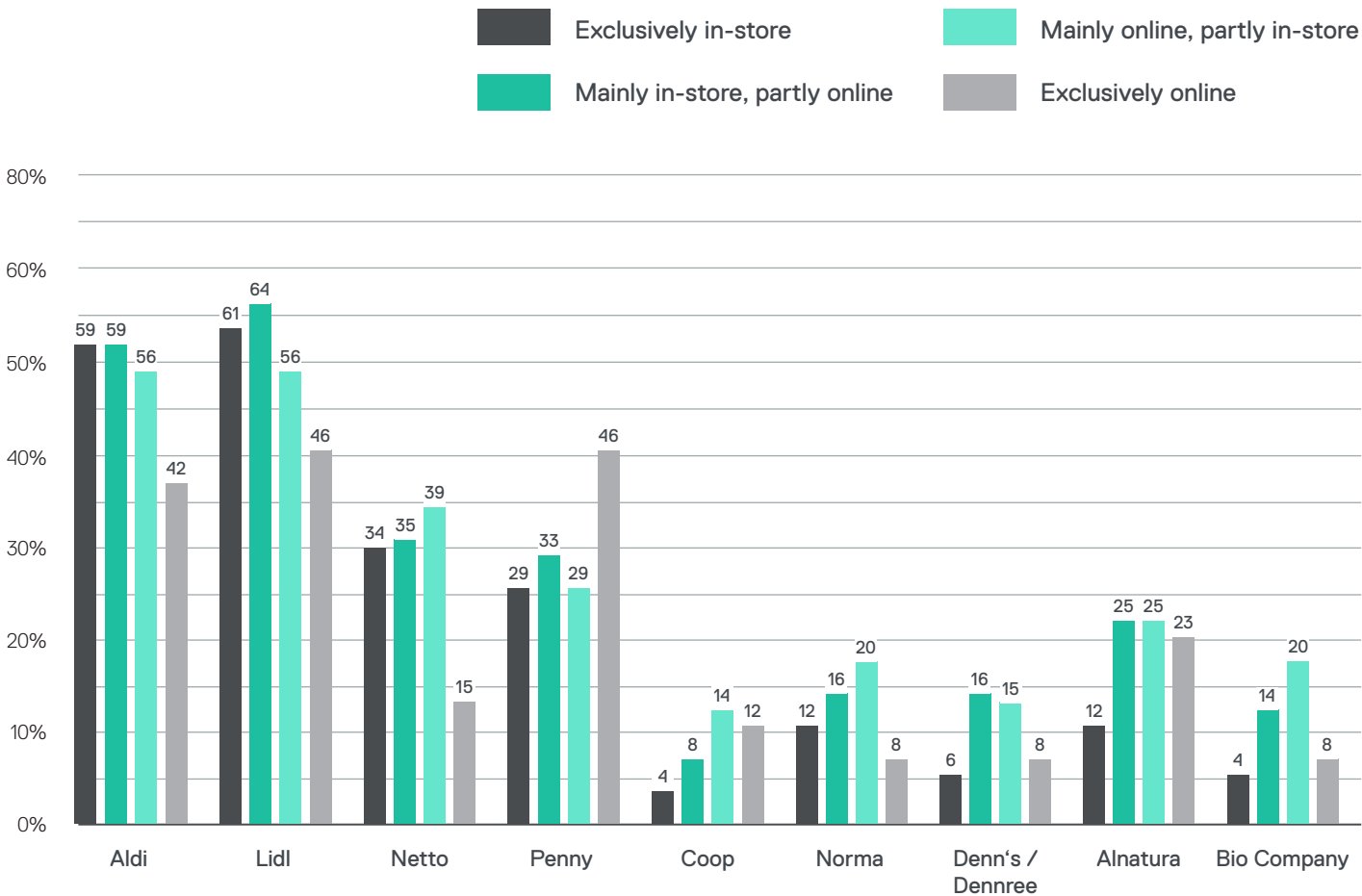


Indeed, when asked which offline-only supermarkets specifically they would like to be able to order from online, the top four providers named by respondents were all discounters: Lidl led the rankings with 61.2%, followed closely by ALDI (58.7%) and then Netto (34.2%) and Penny (30.4%). This is a clear indication of pent-up demand. Many consumers in Germany would like to benefit from discount prices without the somewhat uninspiring experience of a trip to a discount supermarket. The lack of such an option to date quite goes some way to explaining why online spending has the least detrimental effect on supermarkets and discounters (see previous section). Many consumers, it would seem, are waiting to be seduced by

online providers who can give them what their in-store supermarket does – not just, but to a certain degree, in terms of prices.

The survey also reveals that online consumers of organic products are also looking for options from established bricks-and-store brands. While, overall, only 16.4% of respondents answered that they wanted to be able to order from market-leader Alnatura online (9.4% and 8.7% for competitors Denn's and BioCompany respectively), this figure rises markedly to 25% among those who buy mainly online and 23% for those who buy exclusively online. There are similar discrepancies for Denn's and BioCompany.

Preferred brands for an online grocery / e-food offer by current shopping behavior

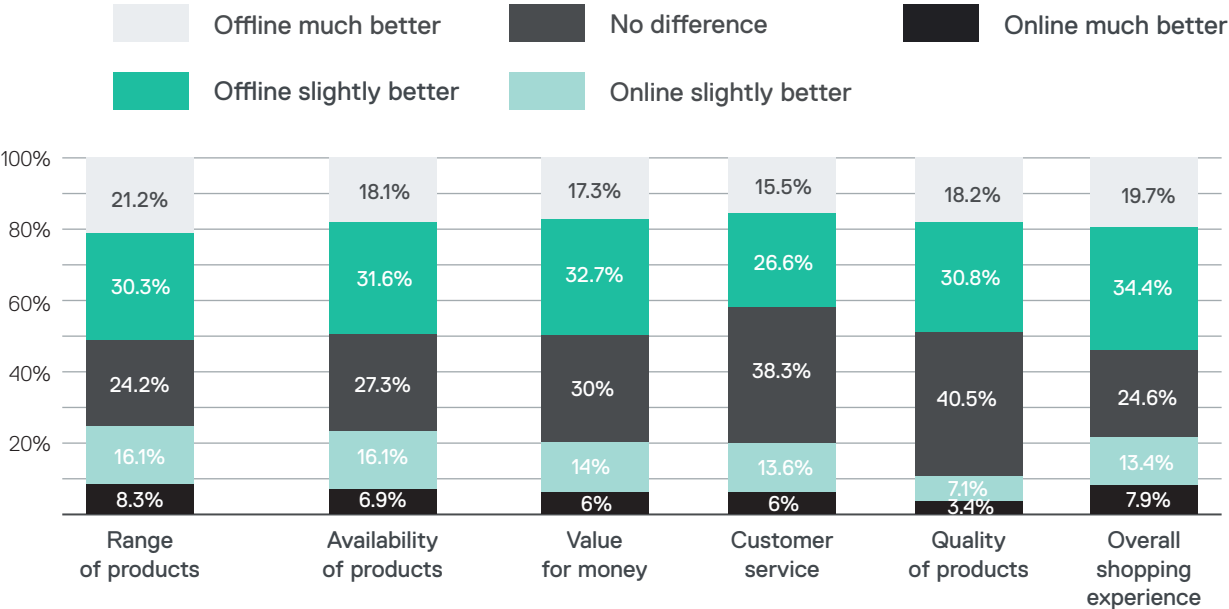


In view of the fact that 27.1% of respondents reported heavy cuts to their spending in organic supermarkets when their online outgoings increased (see previous section), this sends a very clear message to bricks-and-mortar organic providers: they have customers who have gone online and would like to see their established organic retailers follow them. Unlike discounters, however, organic supermarkets cannot assume that their customers will not find a comparable offering on the internet; indeed, many already have and are cutting their offline organic spending accordingly.

Supermarkets are still ahead on price, quality, and experience

Another survey question offers insights into the other things consumers are looking for, but not yet finding online. Indeed, when asked to compare online and offline grocery shopping, exactly **50% of respondents stated that offline shopping represented better value for money** – slightly behind the 51.5% who preferred the selection of food available offline and the 54.1% who rated the overall shopping experience as better in-store. The fact that price is not quite as decisive in this response can be explained by the fact that it is self-selecting: only survey participants who already do some food shopping online responded, excluding a majority of participants who stated that lower prices would make them likelier to shop online.

When you compare online and offline grocery shopping, where do you think the following criteria are better solved overall?



Beyond this, the comparison between channels by respondents who buy groceries both online and offline offers two very clear insights into the strengths and weaknesses of in-store supermarket shopping vis-à-vis online challengers. First-

ly, almost half of those who responded to his question (49.0%) were of the opinion that food quality was higher offline, with only 10.5% convinced that online grocery providers offered better quality. Online was rated considerably

higher in all other areas, indicating that, among existing online shoppers who are by definition less price sensitive, food quality represents a strong suit for in-store supermarkets. Where supermarkets clearly fall down, however, is on customer

service: here, **only 42.1% of shoppers rated in-store customer contact more highly than online providers**, the lowest percentage overall. Clearly, there is something to the stereotype of the overly-brisk German supermarket cashier...



Strong supermarket brands can work online

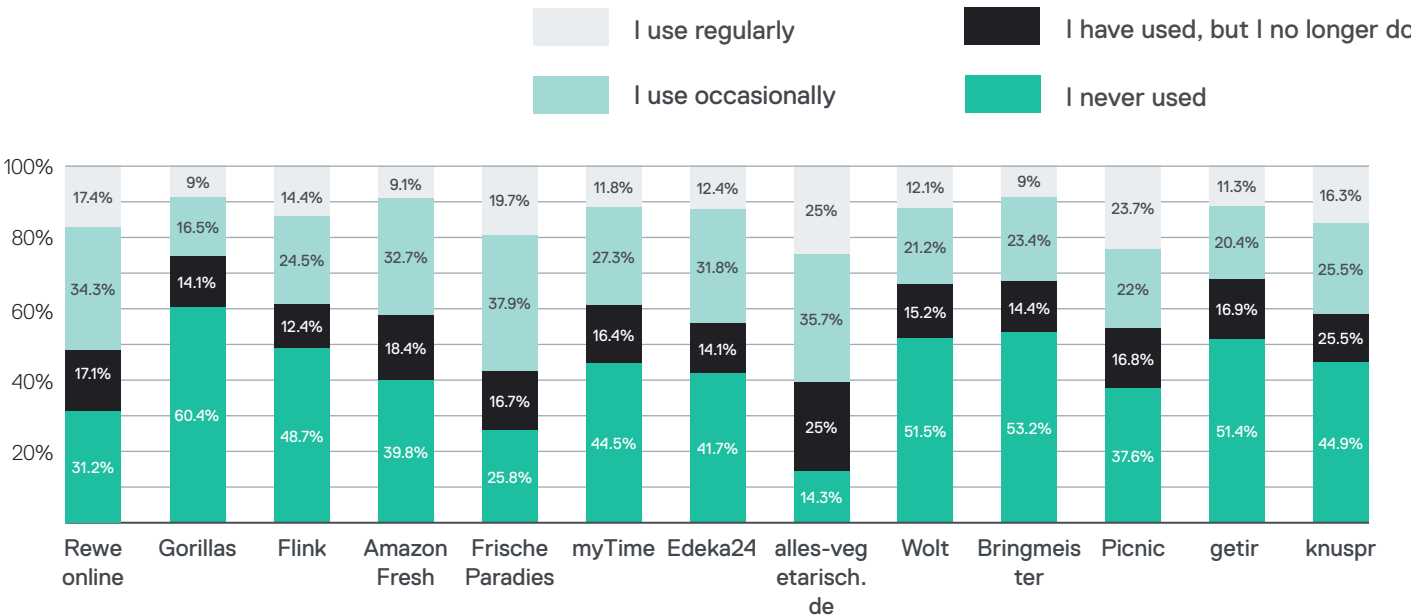
German supermarkets clearly remain in a strong position even in the face of ever stiffer competition online. The strongest position, however, clearly goes to one supermarket chain, Rewe, whose extended investment in its online ordering channel see it outclassing both its established competitors and online newcomers in terms of brand awareness. When asked which online grocery services they had heard of, a **full 44.5% of respondents named Rewe**, more than twice the number who

named Amazon (16.9%) and the third and fourth-placed on-demand services Gorillas (13.3%) and Flink (12.4%). Rewe is also streets ahead of its segment competitor, Edeka, whose online activities were only named by 7.3% of respondents – a disappointing result for Germany's largest supermarket chain inasmuch as exactly the same percentage named Picnic, a new online challenger from the Netherlands only present in some parts of North-Rhine-Westphalia.

While the gap between Rewe and Edeka narrows somewhat when consumers are prompted to select names from a list, Rewe Online still rules the roost here – and benefits from above-average levels of conversion. **Over 50% of respondents had not just heard of Rewe Online, but also used it at least once.** The only brands who convert a higher ratio of consumers who have heard of them into actual customers, are niche providers like FrischeParadies or alles-vegetarisch.de. This

indicates the strength of Germany’s supermarket brands and their potential in online grocery ordering, provided that they have an e-commerce strategy and are willing to commit to sustained investment in the same way as Rewe, which is channeling millions of Euros annually into automated warehouses dedicated to its online operations as it moves away from bridging concepts such as picking-in-store and in-store order collection.

Please indicate what experience you have had with the following online grocery providers



Chapter 5: Online grocery concepts in Germany

While in-store supermarket shopping remains dominant in Germany – to a far greater extent than both in comparable countries such as the UK and France and the smaller, yet faster-moving Dutch and Czech markets, for instance – online groceries sales are growing rapidly. As both German start-ups and challengers from abroad race to expand across the country's top-tier urban areas and, increasingly, into smaller, but attractive towns and cities, the dynamism in the market is now quite simply breathtaking.

A comparison with the last pre-pandemic year 2019 renders this image particularly clearly. Just three years ago, online penetration in groceries in Germany was somewhere between 1% and 2%;⁴ Amazon Fresh, only available in Munich, Berlin/Potsdam, and Hamburg, was one of the largest providers, and the Dutch champion Picnic was only just beginning its expansion into the German market. Besides Rewe Online, German consumers had few full online-supermarket options and, of course, no on-demand fast-delivery order services at all.

In early 2022, Amazon Fresh is still only available in three urban areas. Rewe, however, has opened fully-automatic warehouses in Cologne and Berlin and is expanding its online ordering capacity across the country. Picnic, meanwhile, is advancing rapidly eastwards across North-Rhine-Westphalia, bringing online grocery options to medium-sized towns and cities not yet served by other providers – providers whose number has multiplied considerably and whose growth rates can be dizzying. Knuspr, for instance, a Munich-based full-service online supermarket launched in summer 2021 by the Czech market leader Rohlik, is already processing thousands of orders a day in the Bavarian conurbation and is close to opening in Frankfurt, Hamburg, Cologne, and Düsseldorf.

⁴ [Handelsdaten.de](https://www.handelsdaten.de)



And since 2019, an entirely new market segment has sprung-up: ultra-fast delivery of basic groceries in the central districts of urban areas. Gorillas, set up in Berlin, is already expanding not just across Germany, but Europe, as is its competitor Flink. Wolt, a Helsinki-based on-demand competitor, has also made a successful entry into Berlin and is eyeing up its next German market.



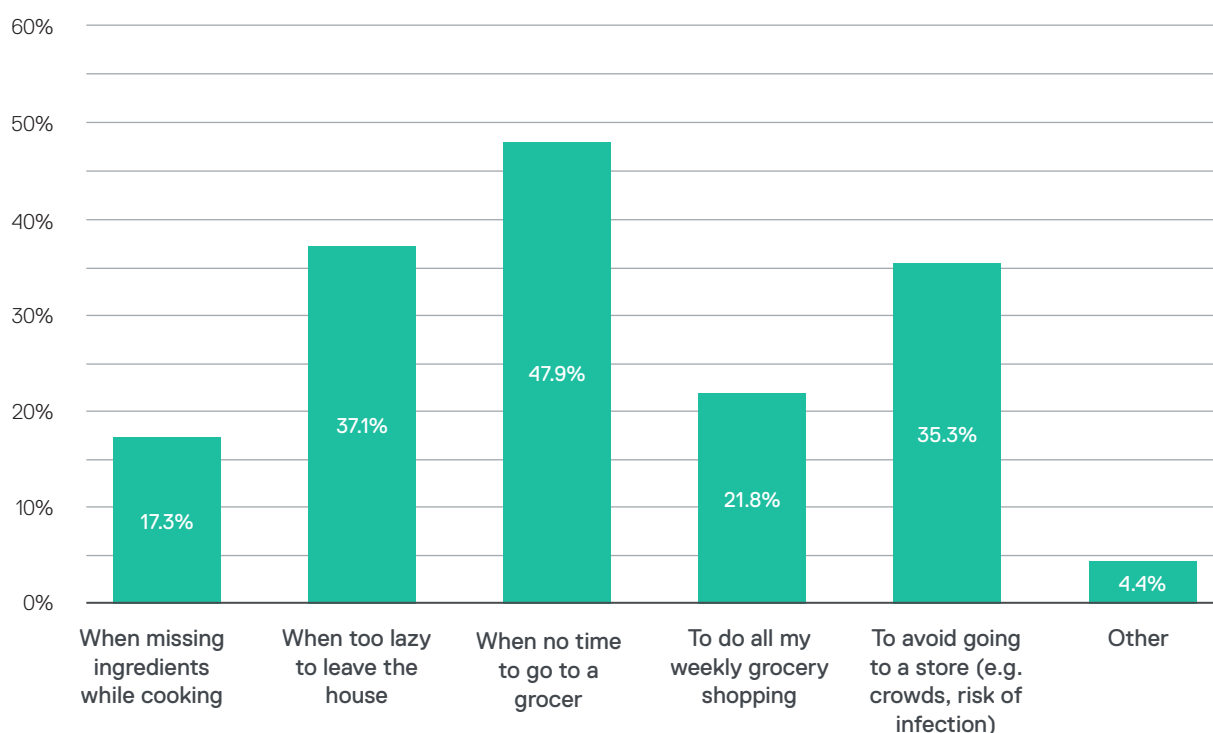
Online groceries: still growing fast from a low base

As the survey results reveal, this is all more than just media hype. The market for online groceries has certainly more than doubled in three years. Already, 5.6% of respondents are doing all or the bulk of their shopping online and a further 27.2% buy at least some food online. In total, online spending is already running at 15.5% of reported household

grocery budgets, leaving 81.6% in the hands of established offline channels, but representing a stark increase in just a few short years.

Of the 15.5% spent online, 9.2% is spent on delivery, which consumers clearly prefer to collect-in-store options. This tallies with the reasons survey participants give for ordering online: **needing to save time is why 47.9% of the respondents who buy groceries online opt to do so.**

When do you order groceries online?



Interestingly enough, **37.1% of respondents were willing to admit to being “too lazy to leave the house”** as their reason for buying online. This is an astonishingly high figure given the cultural taboo in Germany around outsourcing domestic tasks due to aversion – a taboo which has, of late, given rise to the anglicizing euphemism “Convenience”. This motivation for ordering online was closely followed by what can now safely assumed to be a lasting effect of the pandemic: **35.3% of respondents would rather avoid in-store shopping to steer clear of crowds** and reduce their chances of contracting coronavirus.

This survey question reveals, however, that two use cases which many analysts presume to be drivers of growth are actually comparatively limited in their extent. Firstly, with the rise of on-demand services such as Gorillas and Flink, it has become theoretically possible for consumers to order a specific ingredient to their door while cooking; yet **‘the forgotten ingredient’** is a minority concern, with only 17.3% citing this as a reason for ordering online. Similarly, while providers such as Picnic, Knuspr, and not least Rewe offer a full supermarket product range online, only **21.8% of those ordering groceries on the internet stated the ability to do a full weekly shop as their key motivation**. In the following, we will examine these two groups in more detail.

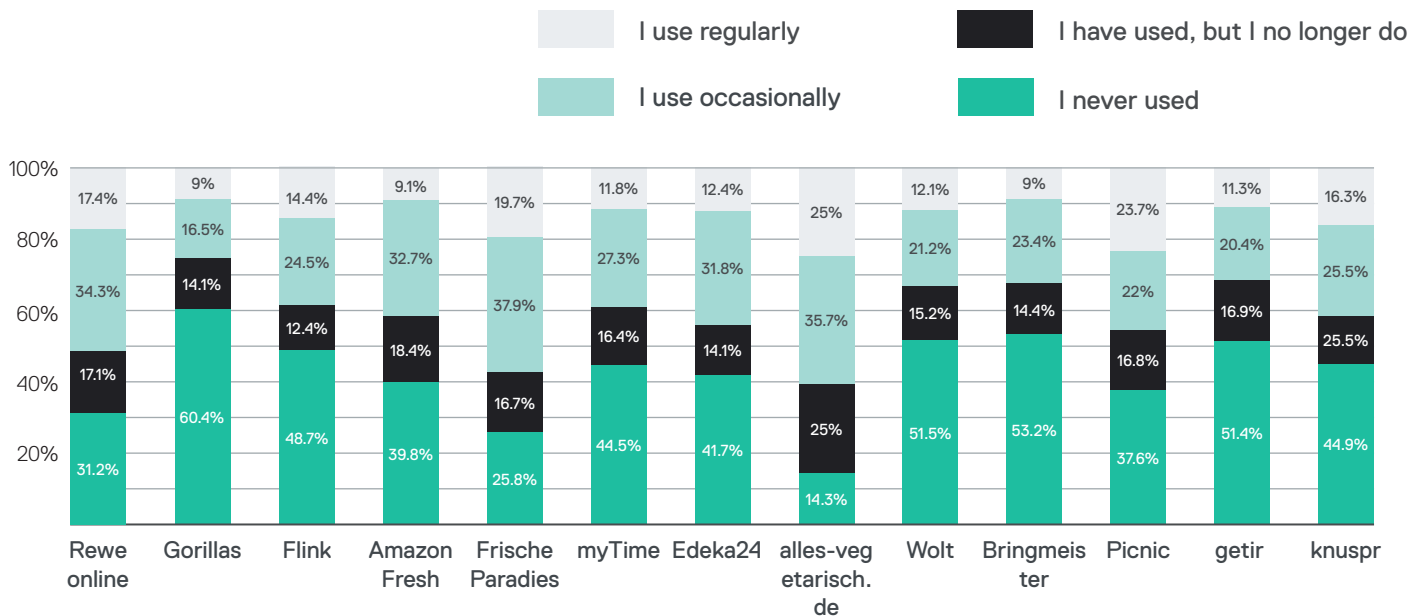
Ultra-fast delivery: off to a flying start, what will come next?

There is no doubt about it: Gorillas, Flink and other on-demand providers are the talk of the town. **In the June 2021 survey, only 3% of respondents named Gorillas unassisted; just six months later, this had tripled to 13% of respondents who named Gorillas and 40.5% recognized it on a list of online grocery companies**. Competitor Flink has chalked up an equally impressive increase in brand awareness: from 0% of respondents in June 2021,

it was just behind Gorillas in being mentioned by 12.4% in January 2022; 36.3% recognized it when shown the name. In both instances, Flink was fourth behind Gorillas, second-placed Amazon, and the ubiquitous Rewe. Other on-demand challengers such as Getir (3.2% unassisted, 17.3% assisted) and Wolt (0% unassisted, 12% assisted) have also, in a comparatively short time-frame and despite limited presence in Germany as a whole, managed to anchor their brands among a not insignificant proportion of consumers.



Please indicate what experience you have had with the following online grocery providers



So in terms of brand awareness, the new kids on the block have made an impressive rise. Nevertheless, this publicity achievement is not necessarily translating into sales traction for the ultra-fast delivery services yet. Despite their high rates of brand awareness, Gorillas, Flink, Getir, and Wolt were all among the providers with comparably low take-up rates. **For Gorillas, for instance, 60.4% of respondents who know the brand have never used it, while 9% are regular users,** and a further 16.5% use it occasionally. **Rewe Online on the other hand has converted 17.4% of respondents who recognized the brand into regular** and 34.3% into occasional users. On the one hand, this means that the market leader still has a clear lead when it comes to turning awareness into customers. On the other hand, Gorillas and co are rapidly catching up and with skyrocketing awareness are still able to put down conversion rates that can keep up with the competition. We must not forget that we are comparing one-year-old startups with nationally operating companies that have long been established on the market.

Overall, however, it is clear from the study that awareness of e-food and online groceries has in-

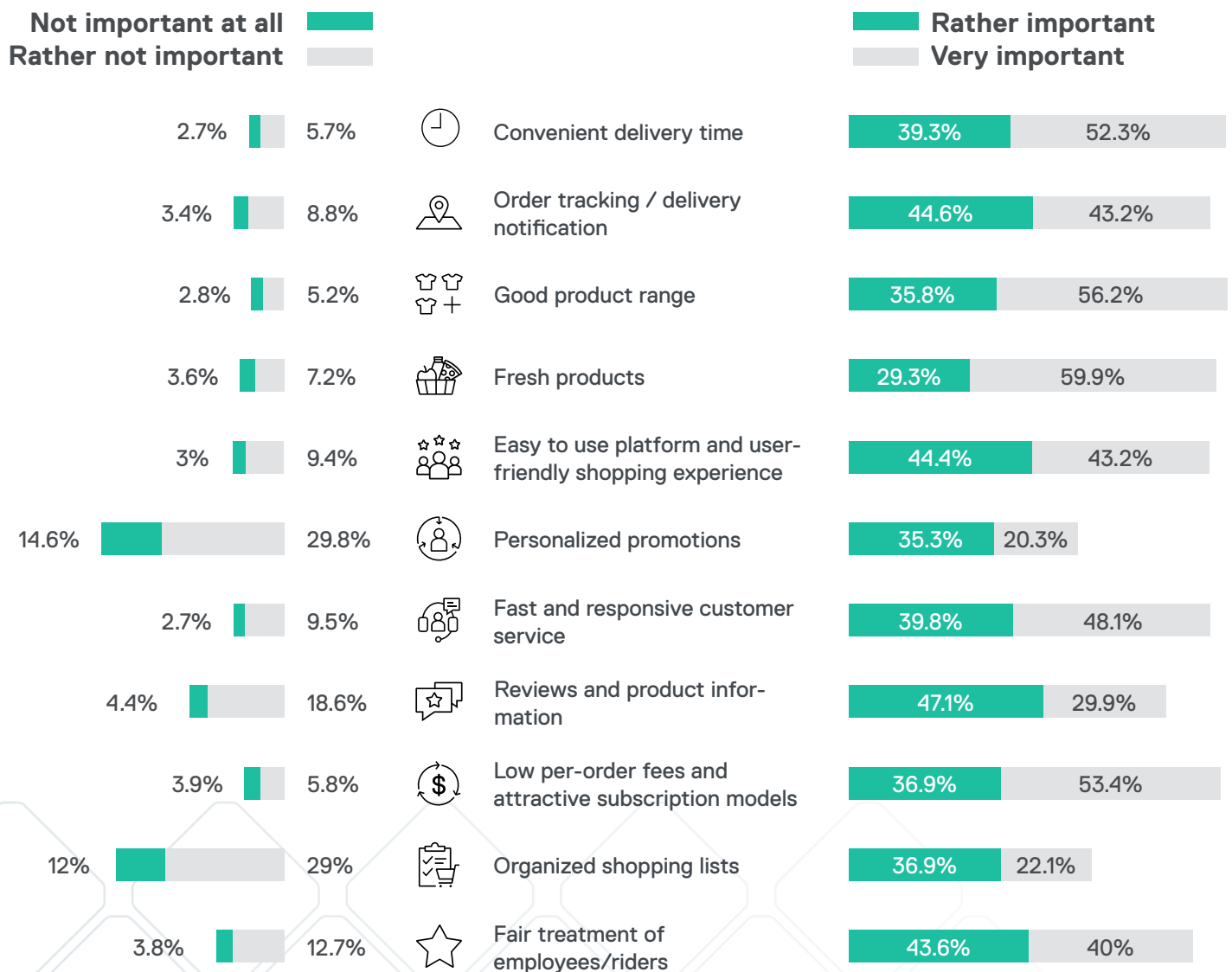
creased, and this is mainly due to the rise of many ultra-fast delivery providers. **In June 2021, only six online grocery brands were recognized by more than 10% of survey participants. In January 2022, this figure had doubled to 12.** The market continues to grow rapidly and the brand landscape is becoming more colorful. This also includes local providers. Picnic, for example, only offers its services in one German state, North Rhine-Westphalia, but has an impressive 55% brand awareness there, which is only 17% less than Rewe and even 2% more than AmazonFresh. **Also, Picnic turned brand awareness into sales, with 23.7% regular shoppers and 22% using it on occasion.** Meanwhile, full-range newcomer Knuspr is also putting on a strong performance, with 16.3% of those who know the brand becoming regular users and 25.5% occasional users in under twelve months from launch. At the time the survey was completed, **Knuspr was only available in Munich and surrounding areas, and already achieved a strong 27% brand recognition in Bavaria.**

So much has happened in the last six months that it is difficult to predict the future. However, it is obvious that there is a lot of movement in

the market, many providers will continue to use their momentum and expand, and local providers have already been able to establish strong market positions. Ultra-fast delivery as the defining hype of online grocery continues to be a hot topic. The competition is likely to be decided in who best succeeds in further expanding the reach while effectively converting it into paying and returning customers. In addition, challenges await such as to predict and respond to demand by keeping

hyper-local depots reliably stocked while posting double-digit growth. Even a temporary lack of availability in basics is a strong turn-off both for prospecting and existing customers. Named by 59.9% and 56.2% of respondents respectively, **“fresh products” and “a good product range” are the two most important criteria for customers when ordering online**; “low order costs” and “convenient delivery times” follow at 53.4% and 52.3% each.

When ordering groceries/food online, how important is it that the online providers/their platforms offer you the following?



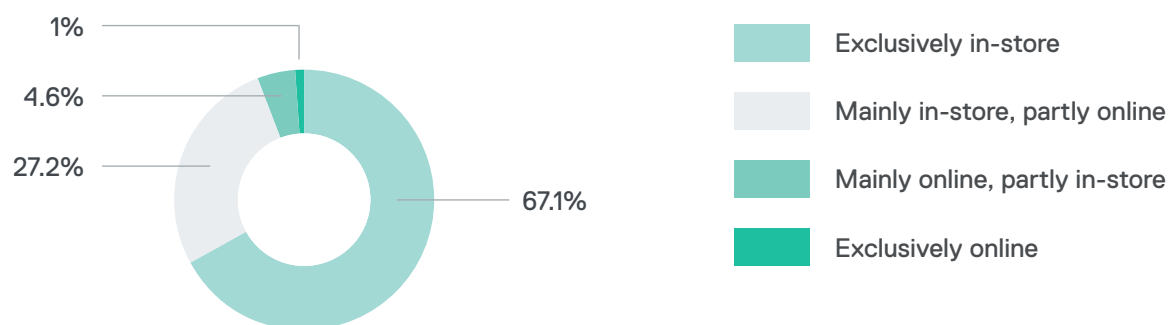
Full-service online supermarkets: many customers still dipping their toes in the water

At the opposite end of the online groceries scale, several providers are working on making the full weekly shop a streamlined, wholly online experience. On paper at least, the addressable market for this kind of service is larger than for ultra-fast delivery: logistically and geographically, there are far fewer barriers to delivering a full shop within a day than to delivering a small assortment of items within 10 minutes; and with 21.8% of online customers specifically stating that they order their weekly shop on the internet and another 35.3% specifying that they wish to avoid in-store shopping for fear of crowds/contagion, it would be

reasonable to surmise that around 50% of online groceries shoppers are looking for a full-service provider.

This hypothesis tallies with higher take-up rates for Rewe Online, Amazon Fresh, Edeka24, Picnic, and Knuspr than for ultra-fast convenience concepts. Currently, **most customers are not yet using online supermarkets to replace shopping trips to bricks-and-mortar stores on a like-for-like basis**: as stated earlier, only 1% of online customers reports buying exclusively and only a further 4.6% buys primarily in the channel; a further 27.2% buy online sometimes, but do most of their shopping offline – at present. That 16.2% of customers see the majority of their spend going online in the next 24 months underlines the potential here, however.

How do you currently buy your groceries?

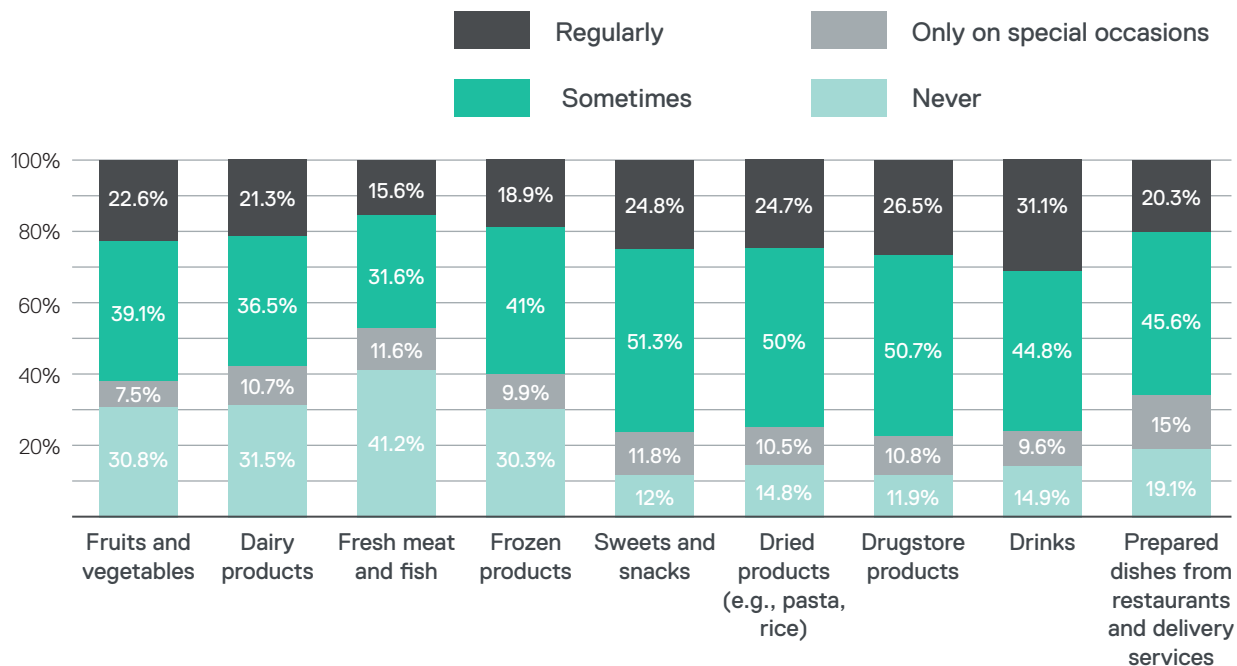


Secondly, as we have seen, online spending is most likely to replace shopping at organic supermarkets and local markets or farm shops and least likely to replace supermarket and discounter shopping. This indicates that most online customers are using online to replace a top-up shop or to order in specific products: the highest category

penetration for regular buying is in beverages, for instance, so many households may be using services like Flaschenpost to slake their uniquely German thirst for bottled carbonated water in a hassle-free way while still doing the bulk of their food shopping at supermarkets.



Which of the following product categories do you buy online?

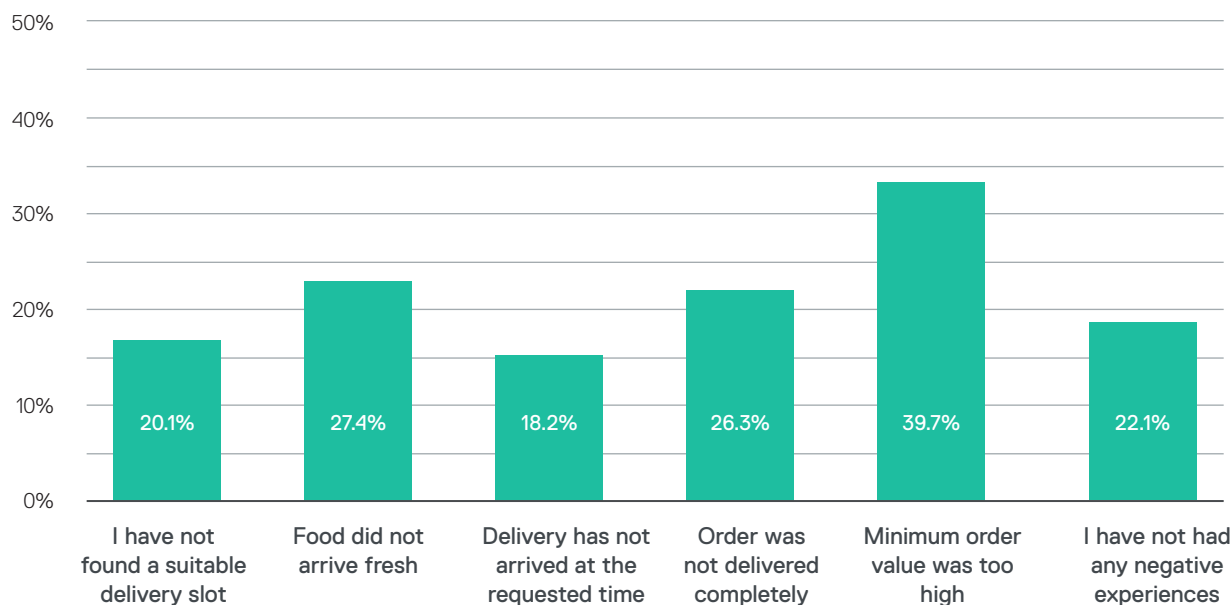


This hypothesis is further strengthened when compared with data on what survey participants preferred about offline shopping: price, availability, and product range were all considered better in supermarkets and other offline channels, as was food quality (see previous section). Another barrier is specific to full-service providers looking to replace supermarkets as the go-to option for the weekly shop: when survey participants who order groceries online were asked **which drawbacks they had personally experienced, the most frequent response (39.7%) was an excessive minimum order fee.**

Contrary to convenience providers, **full-service online supermarkets such as Knuspr and Picnic are more likely to have higher minimum orders, or to charge for delivery below a certain threshold.** There is a chicken-and-egg issue here, of course: online grocery concepts tailored to large weekly orders have very good reasons for stipulating a higher minimum order value than, say, kiosk-style ultra-fast services prioritizing convenience; this higher minimum value may, however, put off a substantial portion of potential customers from trying the service in the first place.



Which of the following negative experiences have you had while grocery shopping online?



It is also interesting to note that the two other most frequently cited bad experiences with online groceries were sub-standard products (**27.4% answered “I got the feeling the products weren’t fresh”**) and missing items (**26.3% had not received their whole order**). While 22.1% replied that they had not experienced any drawbacks to online ordering at all, the deep emotional involvement most consumers have with food shopping means that even relatively low incidences of dissatisfaction at product quality and order completeness may well be enough to deter swathes of otherwise willing customers from relying primarily on online orders for the bulk of their weekly shop.

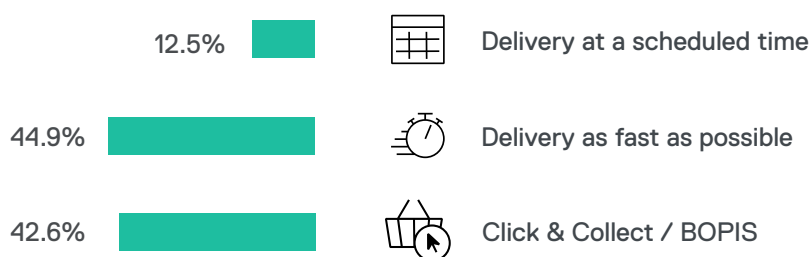
Meanwhile, one long-standing issue appears to have been more or less resolved. Once considered a serious barrier to ordering groceries online – and, briefly, during the early phase of the pandemic, an absolute limitation on growth – the availability of delivery slots has improved markedly: **only 20.1% of online customers reported failing to find a suitable or convenient delivery**

option. This fits both with vastly improved logistics and last-mile capacity on the part of existing providers such as Rewe and with a range of new delivery concepts: Picnic, for instance, is known for its ‘milkman round’ system in which customers are assigned a delivery slot, while Knuspr has opted for a fast-track, but not ultra-fast delivery within three hours. The survey indicates that there is sufficient demand for both models, as **almost half of consumers value speed (44.9%) above all while another near-half others prefer to plan ahead and receive deliveries at scheduled time slots (42.6%)**.

The model for which there is, by quite some margin, least demand is collecting orders in-store (12.5%); given that 47.9% of online shoppers order groceries online due to a lack of time, 37.1% are too lazy to leave the house, and a further 35.3% wish to avoid supermarkets altogether, it is wholly logical that only a low percentage of respondents are attracted to the idea of ordering shopping online only to have to pick it up themselves.



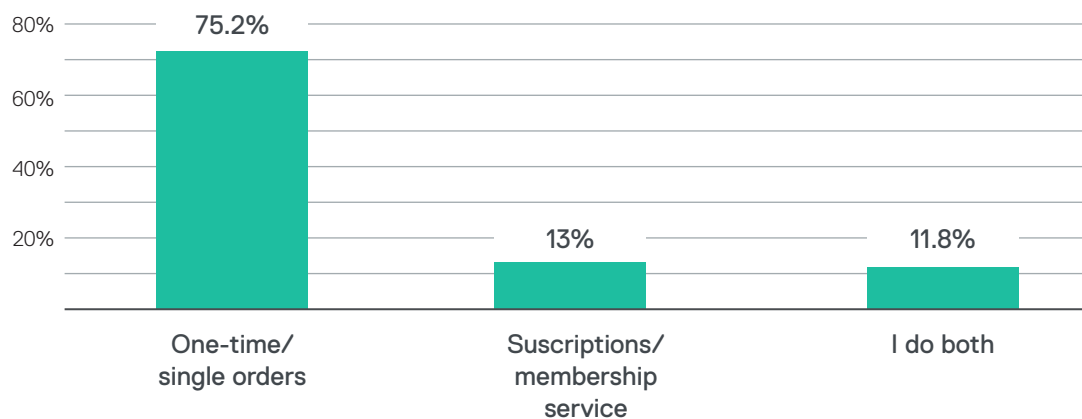
Online consumers' preferences for last mile options



The survey results also reveal that, despite the media attention devoted to concepts such as weekly organic vegetable boxes in recent years, **a majority (75.2%) of online customers prefers to place a discrete order each time they shop.** This may correspond to the well-known contradiction vis-à-vis supermarket preferences and habits, where customers rate a broad selection of products as important only to buy almost exactly the same things week in, week out; for many consumers who fear losing control over what food

they are delivered, a repeat order function may prove more attractive than a subscription offer. **Nevertheless, subscription models are an important part of online groceries, with a quarter of consumers 24.8% currently receiving regular deliveries.** In many cases, this subscription may represent a part of the weekly shop, either in the form of a vegetables box or of regular beverage supply (including – a crucial feature in the German market – removal of empties with deposits!).

Online grocery shoppers' preferences for ordering models



What is promising for full-service providers in a position to ship whole weekly shops to customers in Germany is that, even if the majority of the population remains wedded to doing most of its food shopping offline, 5.6% have already switched wholly or primarily to online – and 16.2% think they will have switched the bulk of their grocery purchases to online orders within the next two years. While this may not sound like much, mature online supermarkets like Picnic or Rohlik's Czech and Austrian entities are already profitable with around 5% take-up in the towns and cities they serve; Rewe, too, is not plagued by deficits in its online operations.

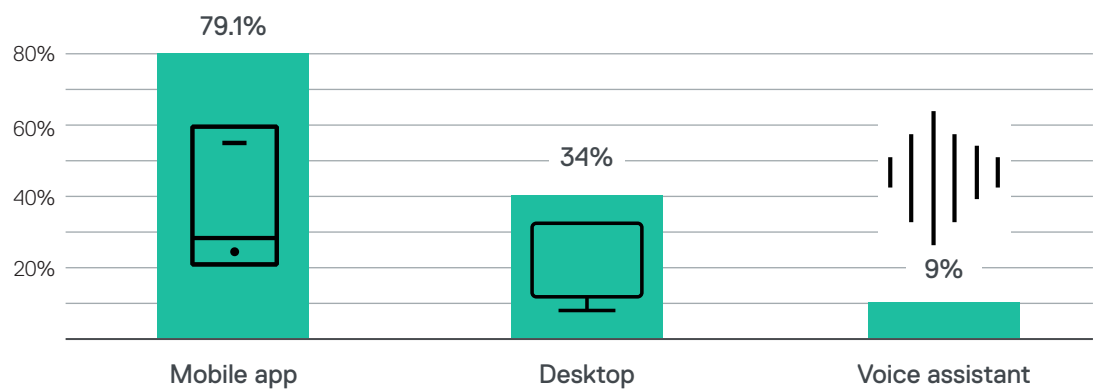
Indeed, even if they are a comparatively small minority, intensive online grocery shoppers are higher-value customers: **12.7% of those who order online spend over €101 a week in the channel, and another 3.2% break the €200 barrier.** This last segment of particularly big-spenders is already more frequent in online than offline channels, where only 2.9% of respondents spend more than €200.

Technology: cross-device flexibility is key

In terms of how customers are placing orders online, the situation is less clear-cut than the apparent dominance of mobile applications seems to suggest. While it is indeed the case that **79.1% of respondents use a mobile device to order groceries online**, it is also true that **39.2% place orders on desktop computers.** Given that several responses were possible, many consumers are likely to switch between these two depending on context: users of ultra-fast delivery services generally have no other option than to order on smartphones and tablets (Gorillas, for instance, is wholly app-based). But these same users may prefer the more methodical nature of desktop ordering – and, not least, the larger display – when doing a more comprehensive shop with a full-service online supermarket.



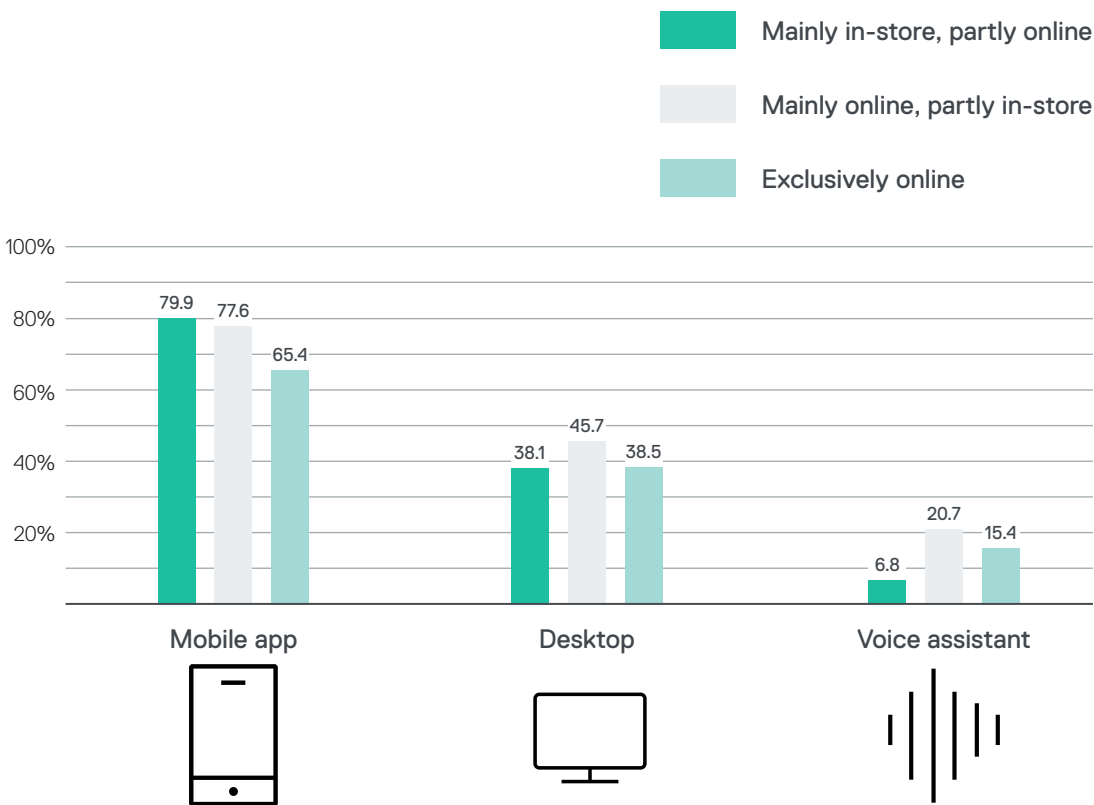
Which of the following devices are you using to buy groceries online?



Support for this interpretation comes from segmenting device preferences by online/offline preferences. Counter-intuitively, **mobile usage is highest among respondents who still do the**

majority of their shopping in-store (79.9%), with desktop usage most widespread among those who do most of their shopping online (45.7%).

Which of the following devices are you using to buy groceries online?



Another insight from segmenting the data this way is the **importance of voice ordering for regular and intensive users**. While voice devices are used by only 9% of all respondents overall, this figure rises to 20.7% and 15.4% respectively among those who buy most or all of their groceries online.

The overall take-away is clear: with the exception of on-demand concepts offering ultra-fast convenience, online providers cannot afford to neglect any device groups. Especially merchants targeting customers for a full weekly shop need to be as accessible on Amazon's Alexa as they are on Microsoft's desktop browsers or in Android and Apple app-stores.



Conclusion

Despite the reassuring headline figures – “70% of shoppers satisfied with supermarket shopping!”, “Over 80% of all food spending takes place offline!” – our survey results ought to make supermarket chains still focussing primarily or exclusively on in-store concepts pause for thought. There are two main causes for concern.

Supermarkets are enjoying the quiet before storm, but are they using it?

On the one hand, there is the paradox that urban consumers within closest reach of supermarkets and with the highest levels of customer satisfaction are also the ones best served by online concepts and most likely to switch at least some spending to them. This should worry supermarket chains if for no other reason than that commer-

cial rents are highest and competition is strongest in major urban areas, so even small shifts away from supermarket shopping could be enough to render many stores markedly less profitable – all the more so given that customers who shop for food online spend freely and may take many of their high-margin purchases with them into this channel.

On the other hand, the potential for luring away dissatisfied customers in areas of lower population density and consumers on a budget is plain to see – and will be a tempting prize for any provider who can solve the obvious logistical challenges this entails. As our survey shows, German consumers would like to see their discounters make them an online offer, but currently, the discounters are in the comfortable position of being able to refuse to do so: budget shoppers and those outside of online grocers’ delivery radii simply have no other choice. Yet if a decidedly low-price online



grocery concept is developed – either by one of the existing discounters, or by a plucky challenger – it is easy to see a segment of price-conscious consumers who would be more than willing to start ordering cut-price food online, forcing those in the segment to start playing catch-up.

In other words, whether they are focussed on higher-income households and more weighted urban areas or pursuing a strict discounter logic, established supermarket chains who are not taking first steps into online deliveries – or making good contingency plans – are living dangerously. Our survey shows that they retain the advantage over online challengers, but have lost the momentum.

Online grocers are doing a good job – and need to do an even better one

Overall, the clear message from survey respondents is that there is a broad willingness to try ordering at least some groceries online and, among a sizeable minority, a strong desire to shift their food shopping primarily into this channel. What appears to have prevented this shift from being more pronounced thus far is a strong performance by established supermarket chains along with teething difficulties among online challengers. This is particularly true of product quality and delivery completeness, where consumers perceive drawbacks to online ordering. The fact that most supermarket shoppers don't make a list (or forget at least one item on it when shopping) and may encounter an "Out of stock" notice in store does not make them any less forgiving when an online grocer fails to deliver something they have ordered. Similarly, product freshness – whether simply perceived or of genuine import to quality – is an area most consumers are unwilling to compromise on: heads of lettuce must be delivered crisp, apples flawless to the door if customers are to entrust the bulk of their food shopping to an online supplier.

As these issues are resolved and attractive concepts are rolled out across Germany, there is every reason to expect online groceries services of all stripes to grow rapidly. And although they have been stealing the headlines, the long-term growth prospects for ultra-rapid delivery services may prove more limited than for stockists of full ranges whose concepts work across a broader geographical area and in a higher number of use cases.

Overall, established supermarkets in Germany have a strong hand: their coverage is extremely good and their streamlined logistics operations allow them to respond to German consumers' price and quality expectations; they have also made strides in terms of shopping experience and are by no means unpopular. They retain a dominant position in terms both of market share and of share of wallet. Yet a close examination of their customers' desires and the real-world example of Rewe Online show that there are immediate prospects for growth online – and medium-to-long-term risks in neglecting this channel.





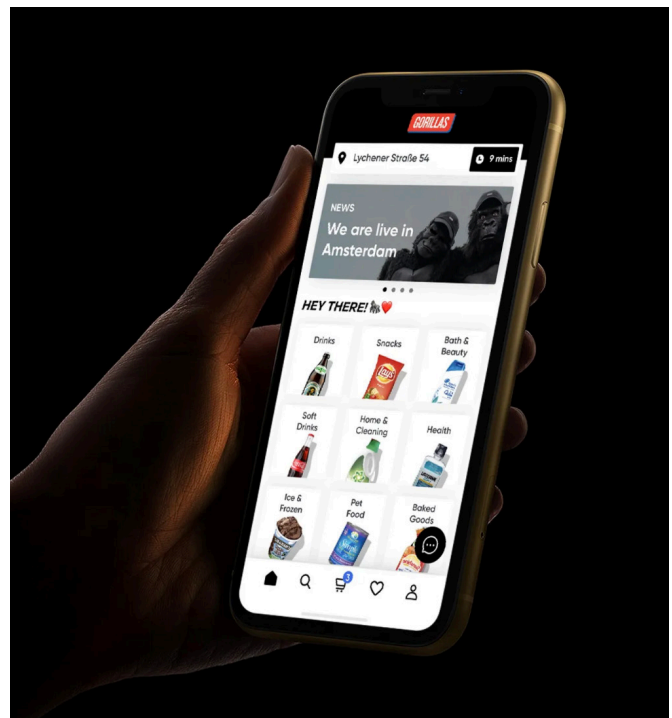
Kağan Sümer, CEO & Founder, Gorillas

Instant delivery is transforming the grocery industry with lightning speed and moving faster than any other industry. Gorillas' value proposition is perfect convenience—whatever you need, delivered immediately. This is a natural evolution of grocery shopping, and I fundamentally believe this is the model for the future. I expect a fast transition from scheduled delivery to Q-commerce. People will still want the convenience of online shopping, but because they are no longer confined to their homes, they will want a retail model that delivers goods immediately. Once customers start using Gorillas, they rarely go back to traditional supermarkets. Q-commerce has an incredible growth potential in an existing 110 billion market and our journey has just begun.

As an additional benefit, we generate data-driven insights through our platform that are extremely valuable to CPG companies, and we can help both global brands and local suppliers gain insights into customer trends and behaviors. We are in a prime position to create new brands and even shape future product assortment. At the same time, our scale opens the door to new revenue streams, such as retail media networks, that are extremely valuable and could therefore enable us to pursue innovative retail partnerships.”

About Kağan Sümer:

Kağan Sümer is the CEO and Founder of Gorillas, the leading European instant on-demand delivery service. It was in the early years of a career in consulting and after a life-changing bike ride, that Kağan envisioned a world where grocery shopping would be radically faster and far more convenient, and so, Gorillas was born in May 2020. In just over a year and a half, Kağan and his team have taken the grocery industry by storm, hiring more than 14,000 employees globally and expanding in 60 cities across 9 countries.





Malte Nousch, Managing Director, Oda Germany

We continue to see significant growth potential in the German online grocery market. The recent demand spurt in Germany shows that customers are ready to try out new offerings for their weekly groceries. We are convinced that thanks to our automated logistics model as well as our intuitive app and web shop, the grocery shopping of tomorrow is much easier, time-efficient, and convenient but above all more sustainable with lower food waste and a lower carbon footprint on the last mile. To give you some concrete examples: With Navegante, Oda has developed its own navigation system that plans routes as effectively as possible for our drivers. This decreases the distances driven and helps protect the environment. Another example: our climate receipt. We show our customers the CO2 emissions of the products we offer and the aggregate impact of their purchases. This is a simple but effective way to inform and encourage our customers to make climate-friendly choices. If we continue to innovate and educate German customers about these advantages of online grocery shopping, I am confident remaining barriers will fall and the online share of grocery sales will markedly increase.

The entire Oda team and I are looking forward to start serving customers in the Ruhr Valley and Berlin later this year. By delivering their weekly groceries to their doorsteps we want to provide more space for life for German customers.

About Malte Nousch:

Malte Nousch is the Managing Director of Oda Germany and a member of Oda's international management team. Prior to joining Oda, Malte held leadership positions with Kaufland, Tesco and McKinsey. Oda (www.oda.com) is Norway's largest and most sustainable online grocery business which provides people with same and next-day home deliveries of high-quality groceries, meal-kits, and household items. After establishing itself in Norway, the online supermarket expanded to Finland in early 2022. Currently, the market launch in Germany is being prepared from Berlin - with fulfillment centers in Bochum and Mittenwalde near Berlin for the second half of 2022.





Udo Kießlich, e-commerce and e-food strategist

The results of Spryker's and Appinio's e-food report once again confirm the prevailing winds for e-food for a good 10 years. At the same time, new entrants have taken advantage of the pandemic to build brand awareness in a short period of time.

Based on all the data and insights I see in the market, e-food's market share of total food retailing is around 2-3% nationwide, which is roughly in line with the data of this study. However, it is worth looking at the metropolitan areas, because that is where the growth is concentrated. In large cities (> 500k), 5% is probably already a reality and a medium-term increase to 8-10% is foreseeable. Store space deconstruction thus starts there first.

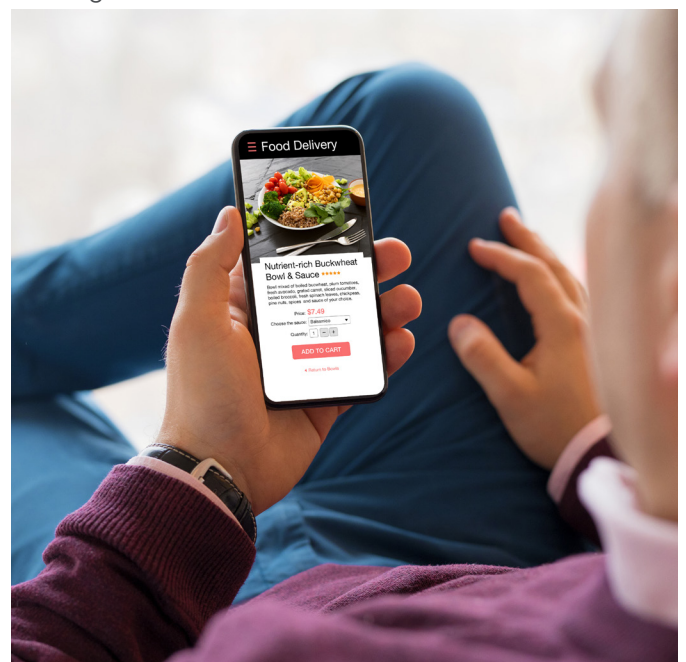
This study also confirms Rewe's leading position in e-food due to the very high awareness of the service. At the same time, newcomers such as Gorillas, Flink, Getir, Wolt and knuspr have scored in a short time. Picnic has achieved outstanding awareness at the federal state level in North Rhine Westphalia with 55%. In 2022, e-food is likely to be characterized by further growth and differentiation with the expansion of knuspr, Getir, Oda, and Yababa, as well as asset-light models such as Bringman and BringGo.

The two largest untapped market segments in online groceries are a) discount supermarkets -

where there is not yet a full-line e-food provider; and b) a pure-play organic full-line. It will be exciting to see whether a new or established player closes this gap first.

About Udo Kießlich:

Udo is an e-commerce expert, advisor and BA. As former CEO (Allyouneed Fresh; kollex) he advises start-ups, investors and manufacturers with a focus on e-food and e-commerce. He is a podcast guest on Kassenzonen, K5-TV and digital kompakt. Udo holds a master's degree in business administration from WHU - Otto Beisheim School of Management.





Yara Molthan, Director Business Consulting, Spryker

Our series of online grocery reports in collaboration with Appinio is about taking the pulse of the market from those leading the most rapid change: the consumers. The results show that German supermarket chains risk losing out on higher spending customers if they ignore the growing demand for online channels, especially considering that consumers expect their online shopping to double over the next two years. The oligopoly of the existing players will be subject to heavy disruption from new competitors taking advantage of their lack of speed and flexibility.

Big players like REWE have already responded and are being rewarded with high levels of brand recognition, and now it's up to discounters to catch up with the online ordering trend. The report revealed that brands like ALDI and Lidl have a golden opportunity to take advantage of the pent-up demand in the German market for online groceries at lower price points.

The offline supermarket experience is not going away anytime soon, however, so retailers need to invest in technology infrastructure that is able to link on- and offline channels without any friction. The customers of tomorrow will expect a seamless experience where they have the power to choose where and how they want to shop for their groceries. Composable commerce is the only choice for retailers looking to keep pace with the modern consumer's expectations, allowing 360-degree

flexibility through best-of-breed services and rapid integration.

About Yara Molthan:

As Director Business Consulting at Spryker, Yara is our expert for business models behind the technology. Previously, she operated as senior manager at the digital consultancy Etribes and was significantly involved in building and scaling three digital startups in China and Germany. Her core competencies and consulting focuses include the design and implementation of comprehensive digital projects, the acquisition and connection of new digital distribution channels in Germany and abroad, and their operational management.



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About Appinio

Appinio is the global market research platform which enables companies to source thousands of opinions from specific target audiences worldwide - in just a few minutes. For the first time, everyone can validate decisions and ideas in real-time with representative results from consumers. As the fastest solution for market research, Appinio delivers feedback from 90+ markets to more than 1000 companies from all industries. Customers include VW, Unilever, Netflix, Gorillas, Jägermeister, and Red Bull.



Spryker

About Spryker

Spryker enables companies to build sophisticated transactional business models in unified commerce including B2B, B2C, D2C, and Enterprise Marketplaces - out of one stack. Spryker customers extend their sales reach and grow revenue with a system that allows them to increase operational efficiency, lower the total cost of ownership, and expand to new markets and business models faster than ever before.

Gartner® recognized Spryker as a Visionary in the 2021 Magic Quadrant for Digital Commerce, and our solutions have empowered 150+ companies to manage transactions in more than 200 countries worldwide. Customers include Aldi, Toyota, Siemens, Ricoh, and Hilti.

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