Ireland's food distribution and consumption – the current state

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1. Introduction

This report outlines the current state of food distribution and food consumption in Ireland. Firstly, the supply side is presented, highlighting the dominant role of major retail multiples in the Irish market (accounting for approx. 90% of sales). Emerging trends in supply are also presented, including online sales, food service, independent food stores, and alternative food networks and home-grown. The major influences on consumer demand are presented including: the importance of health; convenience; and locality for the Irish consumer. This is followed by consideration of the online domain in food provisioning in Ireland, detailing features of market including online supermarkets, alternative food stores, meal solutions, food service apps and box deliveries.

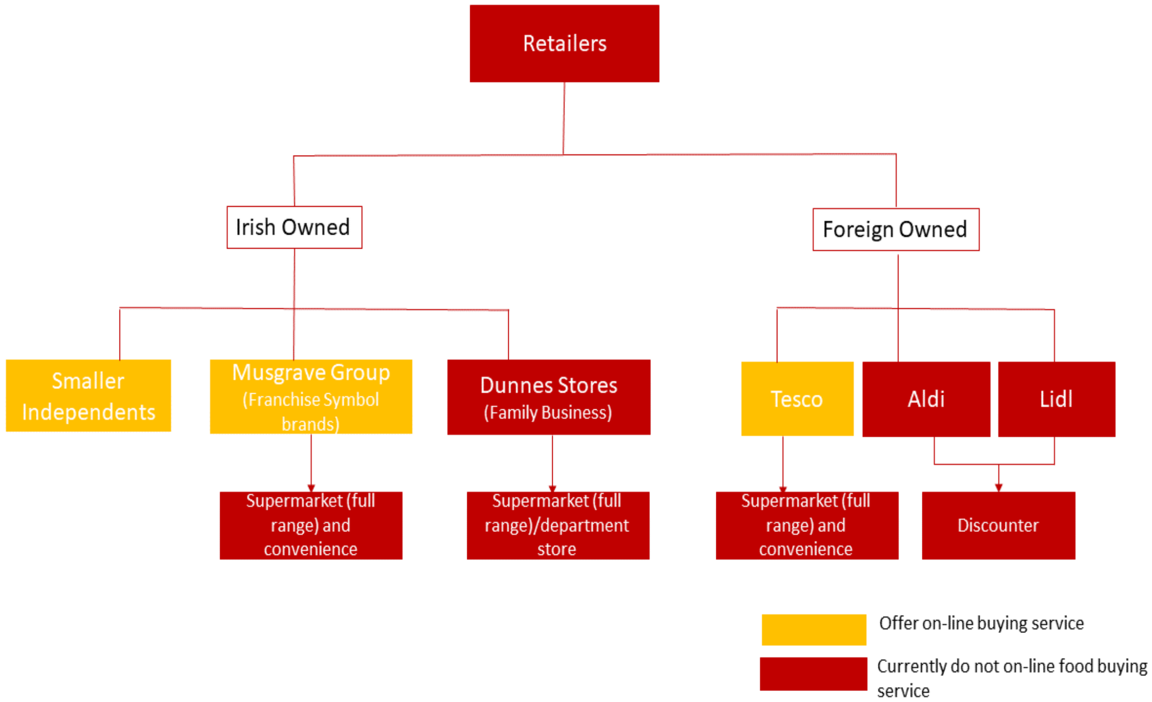
2. The Food Distribution Sector: The Supply Side

The Irish Food Retail supply structure has evolved considerably over the last number of decades as evidenced in the reduction in store numbers from over 20,000 in the mid 1960's to less than 10,000 at the turn of the century. This change reflected socio cultural changes with increasing mobility, a desire for greater variety, value and convenience leading to a demand for the large supermarket 'one-stop' shopping store format. The development of these larger store formats facilitated the growth of the retail multiple and consequently placed increased pressure on the local independent retailer. In response, a strong franchise symbol group (The Musgrave Group) emerged which offered some of these independent retailers the capacity to compete directly with retail multiples. The integration of the wholesale function, through the development of central distribution systems (including central buying), has positioned these multiple and symbol retailers with the capacity to exert more power/control over the supply chain. To this end, product specifications, pricing and promotional offers are directed by retailers who seek to hold and grow their market share. Indeed, they determine which manufactures/suppliers gain access to a significant share of the market place. These retailers continue to respond to changing market needs through consideration of product portfolio and routes to reaching their consumer. This is manifest in, for example, the range of store formats (e.g. increasing numbers of convenience stores and forecourts) that fit with customer context, value line offerings and indeed changing product ranges.

Market Structure

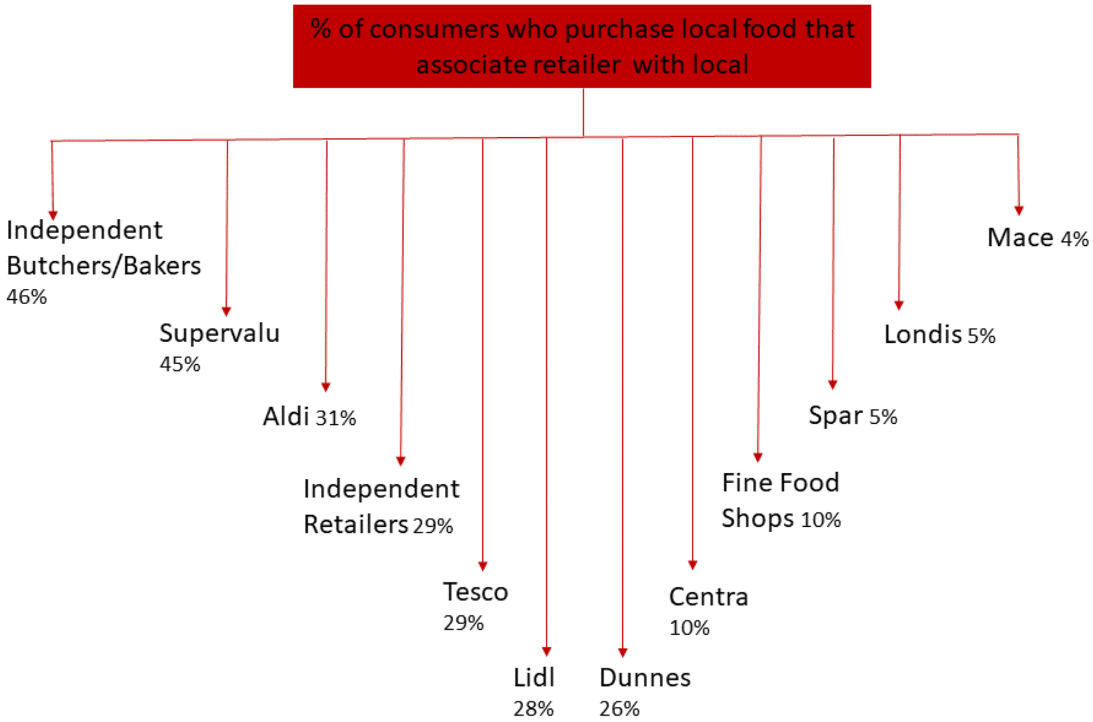
Today the food value chain is characterised as highly concentrated where a small number of businesses hold the major share of the grocery market. Indeed, in 2017, in the "take home grocery" retail supply chain approximately 90% of sales were through major retail operators. According to Berry (2018) Supervalu (22%), Dunnes Stores (22%), and Tesco (22%) account for the highest % value share followed by Lidl (12%) and Aldi (12%). The remaining 10% of the market is accounted for by independents and other food retailers (Source: Berry, 2018). These figures are based on panel data. However, using national statistics IGD (2018) suggest a somewhat different market share profile with the Musgrave Group (including Supervalu), Tesco and Dunnes holding an overall share of 57% with each holding a share of 25%, 16% and 16% respectively. Figure 1 illustrates the overall structure of the Irish food retail market.

Figure 1: Irish Food Retail Market Structure



These data, which suggests that small independent retailers have a market share of no more than 10%, belie the true impact of the independent retailer in the Irish food retailscape. The Irish owned Musgrave Group, through their franchised symbol retailer brands, serve predominately independent family owned businesses and give voice to the needs of these community embedded operators. In terms of store numbers these include: 253 SuperValu supermarkets, 530 Centra convenience stores and 234 Daybreak stores (Marketline, 2018). The significance of this is in a focus on local, community and supporting local producers. Local producers get access to retail space and support in the development of their business. One example of this support is the SuperValu sponsored Food Academy which supports small local artisanal businesses through their journey from business inception to commercialisation. The two major multiple retailers (number of retail outlets owned by one company), Tesco, foreign owned and, Dunnes, Irish family owned business, operate a centralised decision making process with local stores implementing corporate strategies with limited flexibility in responding to context specific local needs.

Figure 2: Consumer association of local foods with retailers



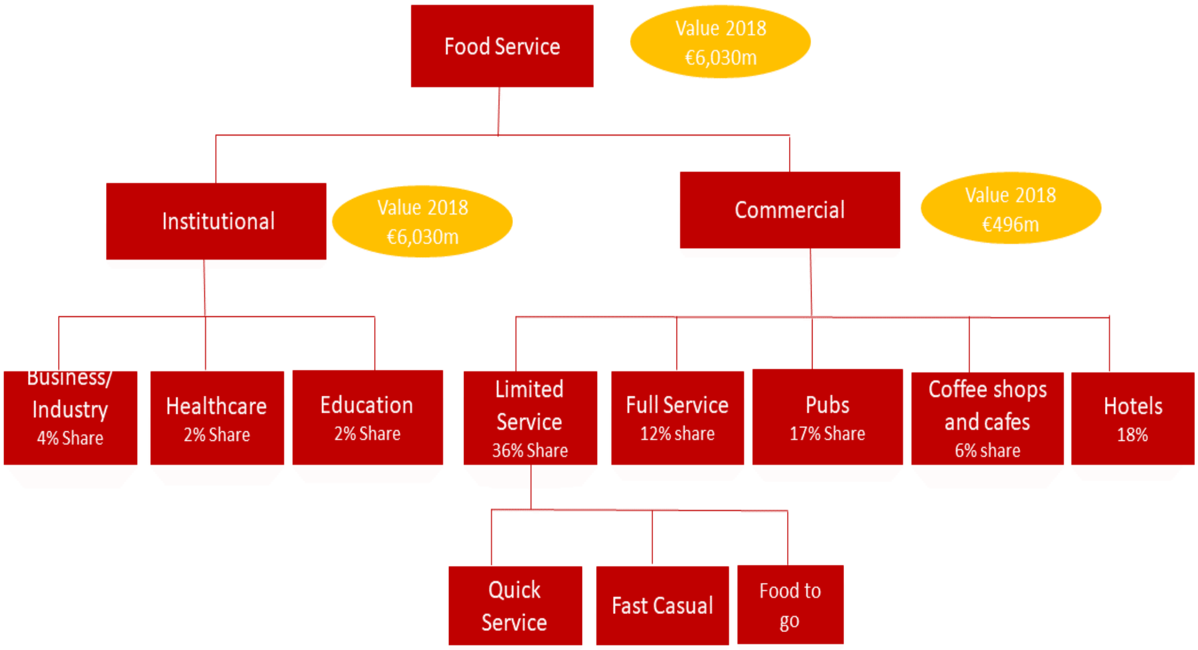
Source: The Thinking House (2017)

A key feature of this market is the recent rise in discount supermarkets Aldi and Lidl. According Fitch Solutions (2018) the rise of discounters in Ireland is parallel to consumers' increasing interest in the 'Value for money', which has been a key driver since the economic crisis in 2008. Furthermore, in response to this, the other main retailers have further introduced their own value line options. However, all retailers have also responded to the other dominant consumer needs such as health, safety, and more ethical and environmental related concerns. Furthermore, these foreign discounters have recently successfully leveraged a local product portfolio aligned to promotion and sponsorship aimed at community and local food producers. Recent research from The Thinking House (2017) found that this approach has positioned these discounters in line with the two major multiples with about 30% of consumers identifying all 4 with local foods. This contrasts with the success of the Musgrave franchise, SuperValu, with 45% of those surveyed associating this retailer with local foods. Figure 2 highlights the impact of this retailer on local focus on the perceptions of local food purchases. Local will be discussed further in the demand section.

The fight for stomach share extends beyond the tradition food retailers with a rise in the food service provisioning evident over a number of years. This reflects a shift from food preparation in the home to preparation and consumption outside the home. Food service now commands about 35% of the value of Irish food purchases. According to Bord Bia (2018) the food service market on the Island of Ireland is currently worth around €8.2bn with the Republic of Ireland

(ROI) accounting for €6.3bn of this. Furthermore, ROI annualised growth rate of 4.7% in 2018 points to continuing expansion of food service in this market. A majority of the food service provision is through commercial channels (91%) with institutional channels accounting for a mere 9% of overall food service market value. This market has benefited from growth in the wider economy, rising confidence among Irish consumers, a strong international and domestic tourism market and a falling unemployment rate. Figure 3 presents an overview of Food Service in Ireland.

Figure 3: Irish Food Service Market Overview



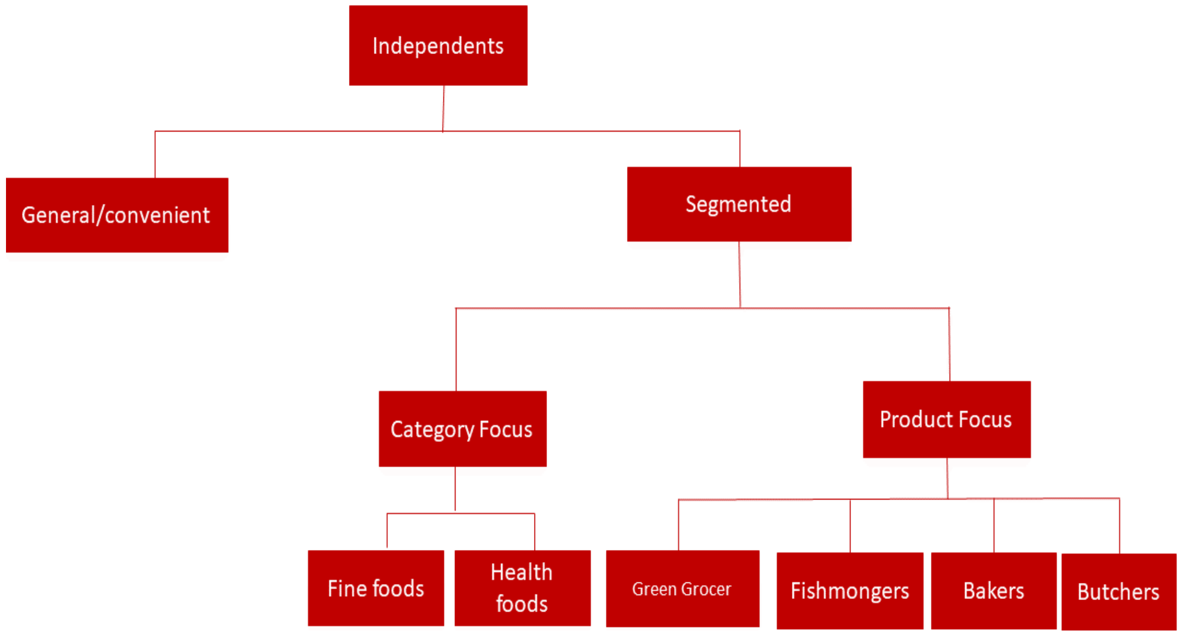
Source: Bord Bia, 2018a

Major retailers (Musgrave Group, Dunnes and Tesco) have responded to the growth in food service with their own offerings within their overall product portfolio. In addition to prepared foods offered from the deli counter a variety of prepared and ready to eat packaged foods are available, for example, salad bowls and an array of sandwiches. These are generally prepared upstream in the supply chain, hence outside the retail premises with major Irish food manufactures (e.g. Kerry Foods and Greencore) supplying the British and Irish markets.

Independent Stores

There is a selection of independent stores (e.g. butchers/artisan stores) in most large towns in Ireland, but concentration of the types of store vary (Figure 4 presents the main types of independent food stores in Ireland). Consumer interest in these stores are also increasing with butchers, independent bakeries, health food stores, and farmers market visited by Irish consumers, (54%), (39%), (32%), and (20%) respectively (Mintel, 2018a). In line with the increasing interest in independent food stores, sales of artisanal/speciality food are also increasing. This is evident in the 2018 annualised sales growth in the Republic of Ireland (ROI) of 3.2%, from €532m in 2017 to €549m in 2018 (Mintel, 2018a). This is as a result of an increased awareness of artisan food and a heightened interest in local produce due to consumer perceptions of such products offering superior quality, particularity from a health and environmental perspective, and, in some cases a desire to have a more direct relationship with food and drink producers. However, as consumers seek convenience in their purchase of local artisanal produce, they are demanding such products through major retail outlets. Indeed, Mintel reports that almost 80% of consumers would like to have such products available in their local supermarkets (Mintel, 2018a).

Figure 4. Types of Independent Stores



Alternative Food Networks

Co-operatives, country markets, farmers' markets and farm shops have a long tradition in Ireland. There are 32 country markets in operation in Ireland today (Country Markets, 2018), 135 farmers' markets (Bord Bia, 2018b) and approximately 160 community gardens (Community Gardens Ireland, 2018). Some home production is also occurring. According to Bord Bia Periscope (2017) households (hhs) produce some of their own fruits (12% of hhs), vegetables (11% of hhs), and herbs (20% of hhs). Identified in FoodWise 2025 (Irish Agri-food plan 2015 - 2025) 'new retail routes' such as 'pop-up' shops, street food occasions, the use of online and mobile technologies and various forms of food entrepreneurialism are growing food supply trends in Ireland but data in this area is currently not available.

3. Food Consumption Patterns: The Demand Side

Health, convenience, local and affordability are generally noted as key determinants of demand. The significance of these is increasing year on year and are fore-fronted in the design of many new foods. In addition, attention is being given to sustainability. According to Lavelle and Fahy's (2012) survey with 1,500 households in Ireland, 86% of respondents reported environmental concern, with 58% feeling they needed to behave in a more environmentally-friendly way. For Irish households the following factors rated the most important when making food purchase-decisions: price (73%); health (73%); taste (47%); how and where the food is produced (43%); brand (33%); and convenience food (11%) (Lavelle *et al*., 2012). Importantly new products are being designed and delivered to satisfy consumer requirements across a number of these key determinants.

Health

Like most developed markets, there is high awareness of the link between health and diet among Irish adults. This has translated into a range of food behaviours being implemented, including both avoidance and approach-based tactics. Types of ingredients, sources of food, level of processing, food preparation practices, character of the food (e.g. authentic/traditional) and cooking scripts are prominent among those seeking health solutions. This greater emphasis on health is illustrated in the increased daily intake (self-reported) of fruit and vegetable from 3 to 4 portions between 2013 and 2017. This interest in healthy eating is further evident in consumer attitudes toward fruit and fibre consumption. According to the recent Bord Bia Periscope (2017) report, a majority of Irish adults (92%) indicated that they are trying to consume a "lot of fruit and vegetables" while 83% also trying to "eat high fibre foods".

The increasing prioritisation of healthy living has also led to greater consideration of the ingredients in processed foods with a move towards avoiding sugar, salt and carbonated drinks (Bord Bia Periscope, 2017) and seeking out clean labels (Berry, 2017). For example, 72% of Irish consumers eat fresh fruit as an alternative to sugary snacks (Mintel, 2018b). This motivation to change has led to market growth in food categories with health benefits and decline in those that are categorised as unhealthy. To illustrate, markets for avocados, granola and soya/dairy free grew by 239%, 192% and 119% respectively in 2017 while, in the same year, markets for white granulated sugar, ambient pure juice and instant soup declined by 30%, 43% and 31% respectively (Berry, 2017). There is also an increased awareness of vegan and vegetarian diets and the associated health benefits. This increased awareness is believed to have encouraged consumers to reduce their meat intake or switch to more meat-free options; 64% Irish consumers reported to be currently increasing consumption of fruit and vegetables and decreasing consumption of meat (Mintel, 2018c).

The demand for healthy food solutions is evident in many consumption contexts. In the quick service restaurant (over-the-counter and drive-thru service) and fast casual (limited service but higher quality products, design and ambiance compared to quick service restaurants) there is evidence of an increasing number of healthier menu options (lower calories, lower sugar) along with use of healthier cooking methods, local sustainable ingredients and offering plant-based meals (Bord Bia, 2017). Furthermore, food solutions that address health and convenience demands are also evident within the food-on-the go market. This trend toward healthier eating is also influencing the practices of full-service restaurants (where indulgence has traditionally been an important driver of demand) where menus are being edited and recrafted to incorporate more fruit and vegetables. Food retailers are responding to this trend by aligning their own-label product portfolios to fit with healthier diets (Mintel, 2017).

When considering health, attention also needs to be given to cooking practices and the importance of this in addressing health concerns and time pressures. While taking cooking classes, as a means to enhance cooking skills, is limited (according to Bord Bia studies approximately 10% of Irish adults participate in this activity in any given year), a majority of Irish consumers viewed cooking during weekdays as important due to its association with "eating well" (52% in 2017). The importance of eating well through cooking has become more prevalent when compared to 2013 when about a third of adults viewed cooking in this way (Bord Bia, Periscope, 2017). The importance of cooking to eating well is evidenced in self-reported behaviours, in 2017 almost 70% of Irish consumers engaging in scratch cooking at least a few times a week and some 31% reporting that they are consuming convenient ready meals less often than 12 months earlier (Bord Bia, Periscope, 2017). Notwithstanding the evidence of increasing interest in scratch cooking there is also a continued reliance on using ready prepared ingredients by some in meal preparation, 48% of Irish people used such ingredients at least once a week in 2017 (Bord Bia Periscope, 2017).

Convenience

Time pressured individuals, negotiating between the many demands of everyday life, seek out time saving solutions for recurrent everyday practices. This is very evident when examining food practices where convenience food seems to play major role in shaping new consumption demands. The importance of convenient food solutions to Irish adults is evident in the growing demand for: 1) takeaway and grab-and-go solutions within food service (Bord Bia, 2017); 2) online purchasing (including click and collect) in food retail and; 3) easy to prepare and quick to cook products solution in the home (Bord Bia Periscope, 2017). According to Mintel (2018b) 35% of ROI consumers are using pre-prepared products when cooking.

The continuing consumer interest in 'high convenience' foods can be noticed by the total numbers of new pre-prepared food introduced onto the market from 2013 until 2017. In the

UK and Ireland, between 2013 and 2017 over 5,000 new ready meals products were introduced (see Table 1). This reflects a convenience seeking consumer looking for market solution that facilitate them in saving time and effort.

Table 1 Top ready meals launches, by sub category, UK (including NI) And Ireland, 2013-17

Year / Meal Type	**2013 (N)**	**2014 (N)**	**2015 (N)**	**2016 (N)**	**2017 (N)**	**Total Number**
Prepared meals	576	408	614	554	556	2708
Pastry dishes	154	117	175	172	200	818
Pizzas	173	100	173	186	156	788
Meal kits	98	76	100	110	109	493
Instant noodles	61	54	78	46	43	282
Instant pasta	25	10	21	19	17	92
Instant rice	3	4	16	5	10	38
Total sample	1090	769	1177	1092	1091	5219

Source: Mintel, June 2018, p.17

The desire for convenient food solutions is also evident in the forecourt and convenience store growth within the limited service segment (Bord Bia,2017). Additionally, the desire for more convenience is noted in increasing demand for ordering and paying for take-away foods via on-line platforms (Bord Bia, 2017). Further, Mintel (2017) speak to a “straight to you trend”, which reflects consumers’ desire for delivery on demand and a low tolerance for lead times between order to delivery. This presents a significant challenge to companies seeking to service this market. The rising number of food delivery services such as ‘JustEat’ or ‘Deliveroo’ enable consumers to conveniently order takeaways in the comfort of their own home or office, with a quarter of Irish consumers having used a delivery service to have a takeaway delivered in 2017 (Mintel, 2018b).

While some of the trends appear contradictory at first glance (e.g. increase levels of scratch cooking for health reasons and demand for convenient food solutions), taken within context we are witnessing a very strong move towards demand for more convenient healthier solutions within every given context. Interestingly, in a direct link between health and convenience

Mintel report on consumer snacking (2016) showed that 72% of consumers prefer to see healthy snacks at tills and cashpoints as opposed to confectionery as they become increasingly concerned about health and wellbeing. The increasing trend towards snacking, on the go food, and pre-prepared food may also help explain increasing consumer interest in healthier convenient food, with 50% of consumers emphasizing their interest in prepared portions of fruit and vegetables to be equal to one of their five a day, and 71% of consumers eating fruit and vegetables as a snack (Mintel, 2018).

Local

Supporting local producers and buying local is important to many Irish adults (IGD, 2018). 46% of consumers reported an increased likelihood to purchase produce that has information about the farmer or place of production on the packaging, highlighting the increasing importance of provenance to Irish consumers (Mintel, 2018a). While local is becoming a popular term in the food market, what this means still varies, ranging from distance between producer and customer (e.g. made in Ireland through to proximity to the customer's home) to the purchase location (e.g. farmers markets). According to Lavelle *et al*. (2012) Irish households perceive 'local' as 'food which is produced within my country' (63%) and 'food produced within 30km of where I live' (21%). For Irish adults the most generally perceived benefits associated with local produce, as identified in the Bord Bia Periscope (2017), include high levels of overall quality (74%) and ingredient quality (67%), safety (72%) and health (68%). Irish consumers are increasing their demand of more locally sourced products in supermarkets, especially fruit & vegetables and meat, highlighting the growing importance of local provenance of consumer goods in the mainstream retail sector. As mentioned previously, in response, there is evidence that retailers are leveraging their interest for local; for example, discounters such as Aldi have built strong relationship with Irish producers, while Musgraves have established and continue to support and build relationships with regional and local producers. This connection with local was also evident in consumer attitudes to on-line purchases with 76% of Irish consumers being willing to shop more online if there were more Irish online retailers (Mintel, 2018a).

There is some evidence between increasing demand for local and sustainability with consumers increasingly placing more value on local sourcing and ethical treatment of farmers: 59% of consumers reported that they are willing to pay a higher price for fruit and vegetables if it means a fair price was paid to farmers (Mintel, 2018c). In the case of the food on-the-go market, sustainability and locally sourced ingredients are being used as differentiators. Consumers are generally aware of the terms "sustainably produced" (56%), "carbon footprint" (70%) and "food miles" (70%). Awareness appeared to be higher among consumers who bought organic and/or local produce. Consciousness about environmental issues when choosing product is evident with 61% of adults suggesting that they think about this, with 55% preferring to buy from companies that are aware of environmental issues (Bord Bia). Ethical and environmentally friendly packaging is the top claim of the last five years, followed by ease of use (Mintel, 2018b). Retailers have responded to this by stocking more ethically and environmentally friendly products, while businesses and brands are increasingly focusing on the environmental impacts of their production and business operations (Mintel, 2018b). This could be seen in the rapid growing trend in offering products that largely embody ethical and environmental features, such as environmentally friendly packaging, reduced and bio degradable plastic packaging and environmentally friendly production, organic, etc. Table 2 illustrates the claims analysis of fruit and vegetables from 2013 – 2018. There is an increase in product claiming to be environmentally friendly as well as a steady increase of the use of environmentally friendly packaging.

Table 2. CLAIMS ANALYSIS OF PRODUCTS LAUNCHED IN THE MEALS & MEAL CENTRE, SIDE DISH, AND PROCESSED FISH, MEAT & EGG PRODUCT MARKETS, IRELAND, 2014-18

Year / Claim	2014 (N)	2015 (N)	2016 (N)	2017 (N)	2018 (N)	Total Number
Ethical – Environmentally friendly package	257	189	152	139	53	790
Ease of use	165	140	124	95	31	555
Microwaveable	137	104	88	81	50	460
Vegetarian	115	96	83	102	27	423
Ethical – Animal	26	36	44	108	30	244
No additives/preservatives	75	56	44	31	11	217
High/ added protein	35	42	61	37	27	202
Ethical – Environmentally friendly product	67	54	42	32	6	201
Low/no/reduced allergen	44	42	45	53	14	198
Seasonal	76	7	54	57	1	195
Total sample	566	482	390	351	113	1, 902

Source: (Mintel, 2018b, p.29)

4. Digital Shopping

Online Grocery Shopping

According to Berry (2017) on-line grocery shopping accounts for a small proportion of purchase at 2.2% (of sales) currently with an average grocery spend per on-line purchase in 2017 of €66.43. However, growth of this selling channel is significant with reported year on year growth of approximately 25%. This is expected to result in a 5% share of grocery spend by 2022. A variety of food and meal solutions are available to Irish consumers from the online food supply market. The main offerings include 1) online supermarket store, 2) alternative food stores (e.g. ethnic & health), 3) meal solutions, 4) food service apps, 5) box deliveries (e.g. vegetables or snacks). Examples of each is provided in Table 3.

Table 3. Online Food Supply Channels in Ireland

Type	**Example**	**Website**	**Delivery**
Online Supermarket	Supervalu	https://shop.supervalu.ie/shopping/	Home delivery or click and collect
Alternative Food Stores: 1. Ethnic 2. Health	1. Asia Market 2. Organico	https://www.asiamarket.ie/ https://www.organico.ie/food-drink	Home delivery
Meal Solutions	Drop Chef	https://dropchef.com/	Home delivery
Food Service Apps	Just Eat	https://www.just-eat.ie/	Home delivery
Box Deliveries	The Organic Supermarket	https://www.organicsupermarket.ie/	Home delivery

A range of options for the receipt of goods are available to on-line and mobile purchasers. These include home delivery, workplace delivery, click and collect (in retailer store), parcel collection point, click and collect (in non-retailer store). Mintel (2018d) report that of those who bought goods on-line 94%, 11%, 60%, 21% and 13% used the aforementioned opinions respectively. Clearly home delivery and click and collect are the two most preferred options. Only two of the main grocery retail stores, Tesco and Supervalu, currently offer an online ordering service. Currently Dunnes Stores, discounters and convenience stores do not offer this service. Online and mobile purchases are on a growth trajectory, particularly in terms of meal solutions delivery, which is likely as a result of the health trend in the food market. The meal solution market comprises of either prepared meals (often by professional chefs) or meal ingredient (Recipe) boxes (including fresh cut meat/fish and portioned fresh vegetables and potato/rice) to be cooked/prepared in the home by the consumer with the aid of an accompanying recipe card. Delivery and return costs are a concern for suppliers thus, while free delivery would encourage greater use of online grocery shopping it presents a potential barrier to suppliers.

Consumer Online Use & Trends

Social networks are popular amongst Irish consumers with 77% of consumers regularly using Facebook and 26% using Twitter. Recent research highlights the growing popularity of digital media and social networking sites in influencing consumer's interaction with food. According to Bord Bia, some 15% of consumers shared a recipe via social media, while 32% downloaded a recipe last year (2017) and 19% of consumers enjoy sharing photos of food they have prepared on social media. In addition, consumers noted that video technology promoted skills through visualization of the cooking process, reassurance during the process, application of learning and replication of the process (Mintel 2018b). These trends emphasise the high level of reliance on social media and networking sites and its importance in meal preparation and cooking behaviour.

Device ownership is high with 87%, 89% and 62% of Irish consumers owning a PC/laptop, smart phone and tablets respectively (Mintel, 2018d). In addition, 88% of Irish household have access to broadband service (Eurostat, 2018) (see Annex). This provides a strong basis for on-line purchases. Unsurprisingly the use of online and mobile purchasing platforms is increasing with Mintel (2018d) reporting a growth rate of 27% between 2017 and 2018, and an estimated sales value of €11.13bn. Push based marketing is now presenting a significant opportunity due to the potential use of geolocation data to communicate targeted location and time specific information. It is noted that the high levels of ownership of smartphones, more efficient delivery of online purchases, increased confidence in digital payment along with improved network infrastructure has driven this growth (Mintel, 2018d). While the delays in the rollout of high-speed broadband to rural areas has resulted in lower levels of participation in certain regions (Berry, 2017), strong growth is predicted in grocery retailing through this channel over the next 5 years due to ongoing enhancements of this infrastructure (Passport, 2018).

Approximately 64% of Irish customers bought products on-line in 2017, however this figure drops to 16% for grocery purchases. However, survey data from Bord Bia Periscope (2017) suggests that 13% of Irish adults order groceries on-line, with the majority (51%) of these making such purchases less than once a month. Purchases are most frequently made from home using smartphones (54%), tablets (52%), laptops/desktops (75%) and game consoles (23%). Smartphones (22%) were the main device used by Irish consumers for on-line purchase made away from home (Mintel, 2018). Mintel (2018) reports differences in the demographic profiles of those using different devices for purchasing and the types of purchases made. Students, for example, were more likely than other cohorts to make purchases online using their smartphone while away from home. Women are more likely than men to buy fashion items online. Consumers with young children are more likely to buy online when compared with those with no young children, while millennials are more likely than older consumers to purchase online. Additionally, Irish consumers are most likely to buy fashion items and travel services, have a strong preference for home delivery and are concerned about data security when purchasing on-line (Mintel, 2018d).

5. Conclusion

The Irish grocery sector is dominated by a few major retailers (foreign and domestic). Despite the dominance of the classical mainstream retailer, the grocery retail market in Ireland is highly influenced by changing consumption patterns. These changes in consumers demands has led to further significant changes in the map of the Irish food retail market. This is represented by a rise and expansion of many types of socio-technical supply platforms that are carving a niche market. This recent landscape change is prompting many retailers to respond by altering their operational and marketing strategies to meet the new consumers' demands, such as that for local and healthy offerings. The main socio-technical platforms include online shops for multiple independent local stores (artisanal shops, health food stores), AFN's (e.g., meal solutions boxes, snack boxes, vegetables & fruit box schemes), and online retail shops (Tesco & Supervalu). Despite the relatively small market share for independents, it is apparent that they are benefiting from increasing consumer awareness and concern of some issues related to health, wellbeing and sustainability. There are many types of alternative food networks operating in Ireland with farmers' markets, and farm shops two of the most popular. However, the online AFN's such as, 'meal solution' subscription schemes and vegetable and fruit box schemes are recording increasing popularity. The vegetable and fruit box schemes focus on promoting sustainability, healthy eating, and safety (organic), and supporting local producers. While 'meal solutions subscription schemes' that comprise the ready meal box schemes and recipe boxes focus on promoting convenient nutritious and healthy eating and making cooking more convenient. Common among these innovative food supply sectors is their reliance on digital and communication technology. The online grocery sales are lagging compared to the total online sales, however, it is currently finding its anchor as a convenient sales channel in the Irish grocery retail market with a significant year-on-year increase in growth. Significant ownership of technological devices (e.g., smartphones, computers, tablets) among Irish consumers, presents a promising opportunity for the online grocery retail markets to continue its growth by capturing a larger share of online users in the coming years. However, continuous growth of the online grocery purchases is conditioned by increasing the online offering of convenient, healthy and affordable food products and services, increased online avenues for local produce, and providing an efficient delivery service.

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Annex

1. Table 1: Household with broadband access

Unit/Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
% of Household	43	54	58	65	65	67	80	83	86	88

Source: (Eurostat, 2018)