

the next chapter, in which we are careful to distinguish buyer and seller concentration, and to employ consistent criteria of measurement.

#### 6.4 The changing face of retail outlets (Tables 6.6 - 6.9)

Both from casual empiricism and previous studies, it is clear that the face of food retailing has undergone a major shift in recent decades. Due to the spread of, first, supermarkets and then hypermarkets, the demise of the traditional counter-service family-run store has been dramatic and probably irreversible.

**Table 6.6: Grocery Turnover by Store Type**

	hypermarkets		supermarkets		others*
	1996	<i>change since 1980</i>	1996	<i>change since 1990</i>	1996
Austria	12	+3	52	+11	36
Belgium/Luxembourg	16	-	70	+5	14
Denmark	17	<i>n.a.</i>	59	+8	24
Finland	22	<i>n.a.</i>	51	-1	27
France	51	+16	44	-	5
Germany	24	+8	52	+7	24
Greece	5	+5	51	<i>n.a.</i>	44
Ireland	12	<i>n.a.</i>	41	<i>n.a.</i>	47
Italy	13	+13	39	<i>n.a.</i>	48
Netherlands	5	+3	82	+7	13
Portugal	42	+42	28	+10	30
Spain	34	+22	25	+5	31
Sweden	13	<i>n.a.</i>	64	+4	23
UK	45	+29	42	+2	13

*These figures are for percentages of national aggregate turnover accounted for by each type of outlet*  
*\* superettes & clerk service*

*Source: ACNielsen, Retail Pocket Book, 1998; La Distribution Alimentaire, 1998.*

*Definitions: Hypermarkets an 2,500 + sq.m.; Supermarkets an 400-2,499 sq.m.; others (including superettes and clerk service) an <400 sq.m. These definitions, whilst typical, are not universally adopted by all data sources. The above cited sources appear to have used these definitions.*

- The diffusion of hypermarkets (columns 2 and 3 of table 6.6) is obviously well under way, but incomplete, in all member states.

According to these figures, it is most advanced in the UK and France (in line with their relatively high concentration levels). In most other countries, there is relative uniformity, with the hypermarket market share lying in the region 10-20% - with the exception of the two Iberian countries (both of which, interestingly, have been significantly penetrated by French retailers.) In nearly all countries, however, the increase in their market share since 1980 has been significant.