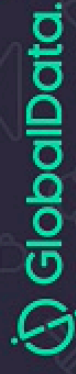


The total discount retail market has grown by 75.1% during the period 2012-2017 and is forecast to grow 36.1% over the next five years

Total discount retail market
£23.9bn
2017

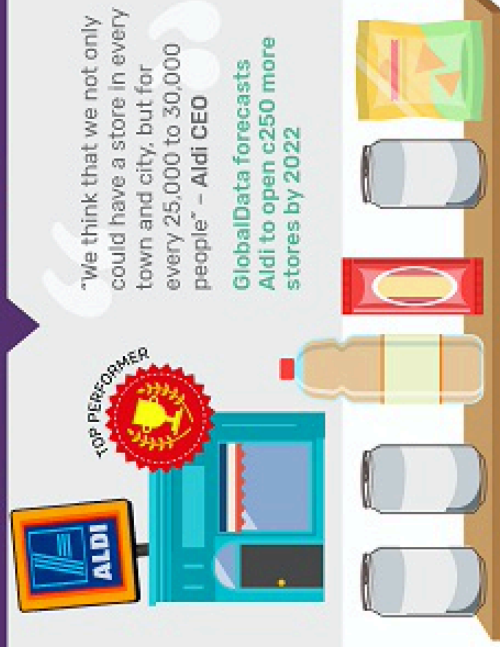


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FOOD & GROCERY



Discounters will gain £13.7bn of food & grocery sales between 2012-2022e



The improving consumer perception of discounters' own label products has facilitated rapid growth. Increasing own label penetration will be essential to offset the effects of input inflation.

DIY & GARDENING



Discounters will gain £1.4bn of DIY & gardening sales between 2012-2022e



The discount DIY & gardening market will benefit from consumers trading down during future periods of restricted disposable income.

HEALTH & BEAUTY



Discounters will gain £2.0bn of health & beauty sales between 2012-2022e



The health and beauty market depends on known and trusted brands; the discounters can capitalise on this by undercutting the mainstream stores with opportunistic buying and lower overheads.