

# World Market for Retailing in 2021

September 2021

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## INTRODUCTION

### Scope

COVID-19 has transformed the global retailing industry

## THE RETAILING INDUSTRY TODAY

The retailing industry is staging a tentative recovery from the pandemic

Retailing weathered the pandemic better than other service industries

E-commerce posts strong growth as the Asia Pacific region gains ground

The rise of e-commerce powers non-store retailing to new heights

E-commerce projected to be largest global retail channel by sales in 2021

China and the US continue to display the greatest growth opportunities

## LEADING COMPANIES AND BRANDS

Market consolidation in the global retailing industry picks up speed

Walmart retains the top spot, but e-commerce players are gaining round

Online marketplace operators are recording rapid sales gains

## TOP FOUR TRENDS SHAPING THE INDUSTRY

Examining trends shaping the retailing industry

In the wake of COVID-19, omnichannel will drive the retail recovery

Store-based retail adapts, evolves and mutates

Livestreaming emerges as a tool for engaging digital shoppers in real time

China, US, UK and Brazil emerge as top markets for live selling in 2021

K-shaped recovery means a renewed focus on value for many

Discounters out-perform the rest of grocery retailing

Retailers reimagine fulfilment for a digital-first world

Almost half of population is open to robots or drones making deliveries

## GLOBAL OUTLOOK

E-commerce will increasingly be the default option for many consumers

E-commerce set to make significant gains in emerging markets

## GLOBAL CHANNEL SPOTLIGHT

Global snapshot of grocery retailers

Global snapshot of non-grocery specialists

Global snapshot of mixed retailers

Global snapshot of non-store retailing

## REGIONAL CHANNEL SPOTLIGHTS

Regional snapshot: Asia Pacific

Regional snapshot: Western Europe

Regional snapshot: Eastern Europe

Regional snapshot: North America

Regional snapshot: Latin America

Regional snapshot: Middle East and Africa

Regional snapshot: Australasia

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