



# Grocery Retailers in Asia Pacific

April 2023

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## INTRODUCTION

Scope

Key findings

## REGIONAL OVERVIEW

Asia Pacific the biggest region in terms of grocery retailers sales

After the setbacks in 2020 and 2022, growth expected for grocery retailers from 2023

Small local grocers still dominate grocery retailers sales in the Asia Pacific region

Small local grocers and supermarkets lose sales over 2017-2022

Chinese losses drag down the overall regional performance in 2017-2022

Small local grocers fighting off competition from e-commerce and modern retail

## LEADING COMPANIES AND BRANDS

Strength of small local grocers channel makes for a fragmented overall market

Japanese players in the leading positions

Japan, China and South Korea the biggest market for all of the top 10 players

7-Eleven's pan-regional presence keeps it ahead of the chasing pack

## FORECAST PROJECTIONS

Steady growth expected over the forecast period for Asia Pacific grocery retailing

Small local grocers expected to increasingly team up with e-commerce players

## COUNTRY SNAPSHOTS

China: Market Context

China: Competitive Landscape

Hong Kong, China: Market Context

Hong Kong, China: Competitive Landscape

India: Market Context

India: Competitive Landscape

Indonesia: Market Context

Indonesia: Competitive Landscape

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Malaysia: Competitive Landscape

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South Korea: Competitive Landscape

Taiwan: Market Context

Taiwan: Competitive Landscape

Thailand: Market Context

Thailand: Competitive Landscape

Vietnam: Market Context

Vietnam: Competitive Landscape

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