



Euromonitor
International

The Online Grocery Landscape of the US

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INTRODUCTION

Scope

Key findings

THE ONLINE GROCERY LANDSCAPE

Introduction: The US online grocery market today

Who is the American online grocery shopper?

The battle between cost and convenience is perpetual

Online grocery in the US is largely consolidated among four major players

Meals, dairy and processed meat and seafood are the leading categories

What categories are over-indexing online and which are under-indexing?

Click-and-collect experiences short-term turbulence but long-term potential is strong

The PC remains the leading way to order groceries, with mobile devices close behind

FUTURE OUTLOOK

Online grocery will be the largest source of future sales growth for food and beverages

Amazon vs Walmart battle will define the coming years of online grocery

Gen Z's family formation patterns will necessitate a pivot to new types of consumers

Tech scepticism among Gen Z will slow adoption of newer ordering methods

CATEGORY DIVE: FOOD

Meal kits have been standout performers in the past, but they are slipping

The "infinite shelf" is more important in snacks than any other food category

Online shoppers are more sceptical of fresh food than of any other category

Baked foods face the same challenge as fresh food, but processed categories do not

Walmart outgrows the dairy category overall with its private label products

CATEGORY DIVE: BEVERAGES

The complexity of alcohol selling has made third-party services especially important

Hot drinks is the category that overperforms in online grocery more than any other

Soft drinks looks remarkably similar online and offline

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