

Infografía

# Abarrotes en línea: un desafío conjunto para minoristas y proveedores de CPG

Si bien los supermercados en línea han seguido aumentando, los supermercados y los grupos de bienes de consumo empaquetados deben trabajar juntos para arreglar la economía diluyente del canal.

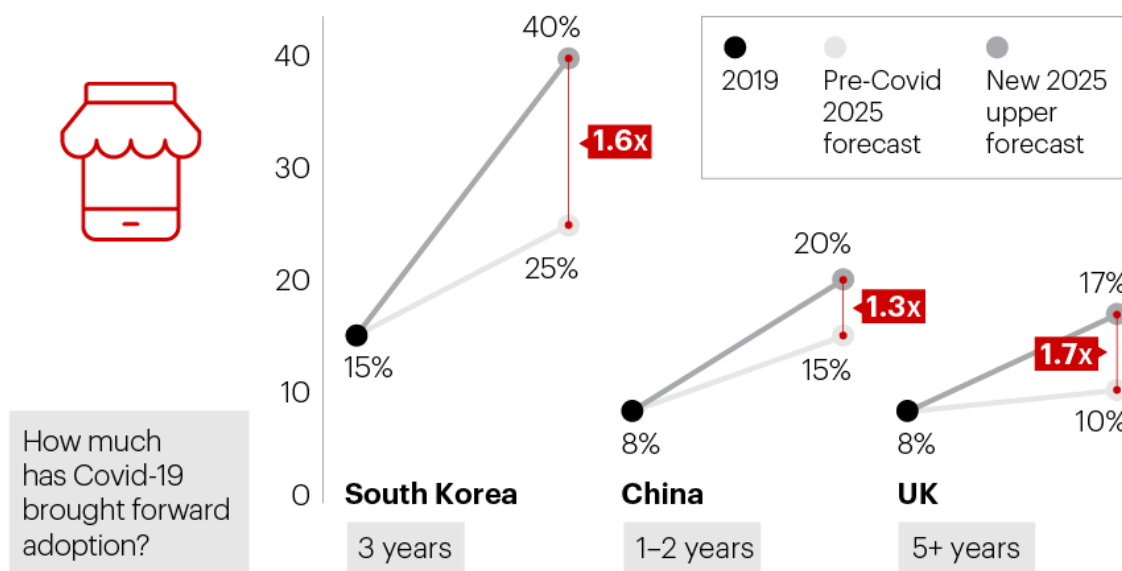
Por Joëlle de Montgolfier, Marc-André Kamel y François Faelli

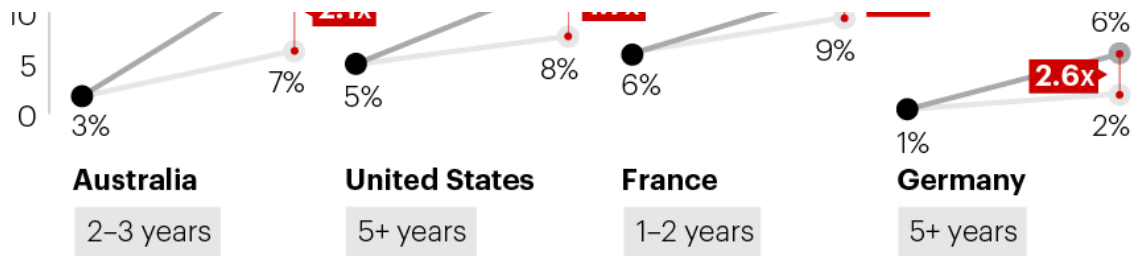
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## No going back

Covid-19 accelerated online grocery adoption by years, and we now expect 2025 to further outpace prepandemic forecasts

### Proportion of grocery sales from online orders





# A common challenge

Online profitability remains a problem for both grocers and consumer packaged-goods groups (CPGs)

Grocers' estimated earnings margin per order (before interest and taxes), without charging customer fees



Food and beverage CPGs' estimated earnings margin (before interest, taxes, depreciation, and amortization)



# The path forward

Grocers and CPGs can take independent actions to win profitably

Grocers and CPGs can take independent actions to win profitability online—but the big change will come from working together

### Grocers



- ✓ **Reduce the cost of picking and delivery**, while optimizing online basket economics
- ✓ **Tailor networks using different fulfillment models** to suit local catchment dynamics, partnering where necessary
- ✓ **Enhance the online customer experience**, recouping the cost of the value-added service
- ✓ **Monetize the digital channel** (selling data and advertising space, renting out excess warehouse capacity, etc.)

### CPGs



- ✓ **Redesign products, packaging, and logistics** to improve unit economics
- ✓ **Tailor the online value proposition** to improve conversion and reduce customer acquisition costs
- ✓ **Innovate to drive repeat purchases and increase customer lifetime value**
- ✓ **Build better brand and category performance tracking**

### Together



**Lower system costs** from “factory to shelf” and invest in automation



**Test and learn** across the offering



**Use online data** to boost retention and drive bigger baskets



**Increase digital awareness and conversion** through precision marketing

**Note:** 2025 online grocery forecasts represent the high end of Bain & Company estimate accounting for factors such as new customer recruitment and fulfillment capacity increases

**Sources:** Bain & Company analysis; Nielsen; IRI; LSA; bevh; KOSIS; Australian Bureau of Statistics; CEIC; Forrester; Euromonitor; Bain Covid-19 Consumer/Shopper Survey, powered by Dynata; APQC; S&P Capital IQ; FMI; NRF; Jefferies; Material Handling & Logistics Conference; Bain Advisory Network



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## Autores



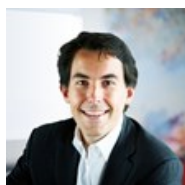
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