

Ireland (ROI) Grocery Retail Market Overview 2026

BORD BIA
IRISH FOOD BOARD



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Introduction

The Republic of Ireland enters Q2 2026 with a structurally strong consumer base underpinned by continued population growth, high labour market participation and positive earnings momentum. The Central Statistics Office (CSO) reports that average weekly earnings reached €1,011.88 in Q4 2025, representing year-on-year growth of 3.1%, reflecting sustained employment expansion and improving nominal incomes across all major sectors of the economy.¹ This supportive income backdrop is reinforced by statutory pay policy: Ireland's national minimum wage rose to €14.15 per hour from 1 January 2026, lifting baseline earnings for lower-paid households.² Demographic fundamentals remain supportive: As of the 27th of April, Ireland's mid-year 2026 population is estimated at 5,356,950, an increase of 48,911 year on year, driven by net migration and natural increase.³

Against this backdrop, the Irish grocery retail market remains highly competitive, innovation-intensive and strategically dynamic, characterised by sustained competition between value-focused discounters and full-service supermarkets differentiated on quality, range, fresh food capability and convenience. As a directional indicator of consumer demand, the most recent CSO Retail Sales Index shows that retail sales volumes in February 2026 were 0.8% higher year-on-year, despite a month-on-month decline, underlining both the underlying resilience of consumer spending and the short-term volatility arising from inflation, pricing pressure, promotion intensity and discretionary sensitivity.⁴

The Irish grocery sector is comparatively mature and sophisticated in terms of store standards, fresh food execution and merchandising, with leading retailers continuing to invest in upgraded store formats, deli and food-to-go propositions and in-store theatre. Grocery retail remains predominantly store-based; however, online has consolidated its role within the channel mix. As of early 2026, online grocery accounted for 6.1% of total take-home grocery sales, reflecting steady structural growth supported by improvements in fulfilment capability, digital interfaces and data-driven loyalty programmes rather than short-term demand distortion.⁵ As shoppers become more cautious and value-driven, retailers are refocusing on making value easier to navigate, reducing friction in-store and online, sharpening store propositions and selectively investing in digital tools, loyalty and operational efficiency to sustain engagement and margins.

Macroeconomic Conditions

Headline indicators remained distorted through 2025, as multinational activity continued to inflate measured GDP. CSO's preliminary results show GDP growth of 12.3% in 2025; however, Modified Domestic Demand (MDD) – a better proxy for domestically generated activity – rose by 4.9%, signalling steady underlying momentum rather than exceptional domestic expansion.⁶

The cost-of-living backdrop persisted into early 2026. CPI inflation was 3.6% year on year in March, with food and non-alcoholic beverages up 2.3%, sustaining price sensitivity, promotional participation and own-label penetration.⁷ Consistent with IGD's view of Ireland as a mature, fiercely competitive grocery market—and its forecast that the market will continue to grow moderately but steadily over the next five years (reaching €27.3bn by 2030; 2.4% CAGR, 2025–2030)—shoppers heightened focus on price is reinforcing discounters' appeal and increasing pressure on full-service supermarkets to defend value perception through sharper entry-price points and targeted promotions.⁸

This demand backdrop is echoed in consumer confidence measures. The Irish League of Credit Unions' March 2026 Consumer Sentiment Index reports a marked deterioration in sentiment as households brace for higher costs and a weaker economy, which typically translates into more deliberate basket planning, down-trading and lower tolerance for price shocks.⁹

External risks intensified into 2026. A more fragmented global trading environment – including the risk of renewed US-led tariff escalation associated with a Trump policy agenda – increases uncertainty for imported inputs (packaging, ingredients and non-food) and supplier pricing. Against this backdrop, the Central Bank of Ireland highlighted renewed disruption in the Middle East and associated energy-price uncertainty; as a net energy importer, Ireland is exposed to terms-of-trade shocks that can erode real purchasing power and raise business costs.¹⁰

Overall, the macro backdrop for Irish grocery retail entering 2026 is one of steady but unspectacular domestic growth (driven more by inflation and price-led nominal expansion than by strong real volume gains) while lingering cost-of-living pressures and elevated external risks continue to amplify price competition and compress strategic headroom.

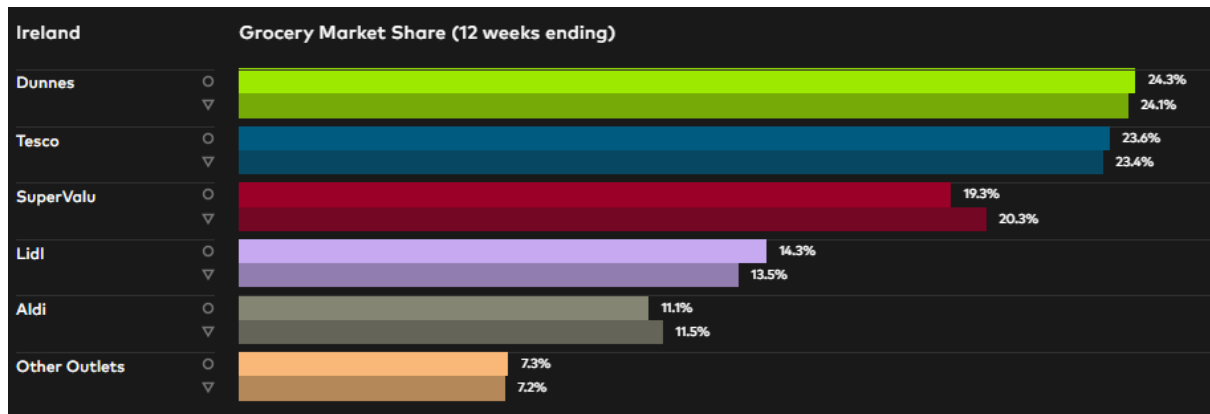
Ireland Retail Market Dynamic

The Ireland retail market is a mature, highly competitive market with five supermarkets dominating from a market share perspective. After a volatile number of trading years driven by tariffs, geopolitical tensions and the inflation shock, the trading environment remains uncertain and promotion led, with elevated price competition, cost pressures and external risks continuing to drive volatility in consumer behaviour.

Worldpanel’s most recent take home grocery figures for Ireland show that sales increased by 5.2% year on year in the four weeks to 22 March 2026. While overall shopping frequency declined by 2.6%, packs per trip increased by 1.3%, indicating fewer but more considered shopping missions. Ongoing geopolitical pressures and elevated grocery inflation continue to influence household budgets, with 26% of Irish shoppers now describing themselves as financially struggling, according to Worldpanel.

Value continues to shape shopper behaviour. Spend on promotions fell by 16% year on year, reducing opportunities for shoppers to manage costs through deals and contributing to smaller overall baskets. As a result, own label strengthened further, with value share rising to 46.5%, nearly two percentage points higher than the previous month. Irish shoppers spent an additional €76 million on own-label products year on year, with premium own label performing particularly strongly. Branded products continued to grow in both value (+4.3%) and volume terms, albeit at a slower pace than own label.

The Irish grocery market remains highly competitive. Dunnes Stores maintained the leading position with a 24.3% market share, supported by continued new shopper recruitment. Tesco followed closely with a 23.6% share, driven by strong value growth and shopper acquisition. SuperValu held a 19.3% share, supported by increased packs per trip and new shoppers. Discounters continue to exert pressure on the market, with Aldi and Lidl growing to a combined share of over 25%, underlining their increasing relevance for value-focused consumers in 2026.



¹¹Unless otherwise stated, all market share figures referenced in this report relate to this same four-week period ending 22 March 2026.

Key Players in the Market

Supermarkets

Supermarkets continue to represent the single largest grocery channel in Ireland, accounting for approximately half of total grocery expenditure, though their share has declined steadily in recent years as spend continues to migrate towards online, value-led and convenience-focused formats.¹²

The growing demand for convenience amongst consumers is accelerating retailers’ investment in digital and rapid-fulfilment solutions. Supermarkets have continued to enhance their online platforms and mobile apps, extending into “top-up” and last-minute missions through on-demand grocery delivery.¹³ For example, Tesco Ireland launched its rapid delivery service, Whoosh, offering a range of 3,000+ products delivered in as little as 45 minutes.¹⁴ Similarly, SuperValu partnered with Uber Eats to offer rapid grocery delivery in as little as 40 minutes from selected stores.¹⁵ These initiatives sit alongside click-and-collect and home delivery services, reflecting a broader shift towards omnichannel convenience and faster logistics to meet time-poor shoppers’ expectations.

Sustainability continues to be a priority for Irish consumers, with recent research indicating that social norms around environmental responsibility is strengthening. The latest RED C Sustainability Monitor shows that a clear majority of Irish adults believe brands should take the lead in helping consumers live more sustainably, reflecting growing discomfort with environmentally harmful behaviours and increasing social pressure to act responsibly.¹⁶ In parallel, NielsenIQ's most recent Green Gauge Consumer Study finds that sustainability remains a meaningful consideration in purchasing decisions, with packaging sustainability continuing to influence consumer choice despite ongoing cost-of-living pressures.¹⁷ This is reinforced by wider European evidence, with over four in ten consumers rating the environmental impact of packaging as an important factor when making purchase decision.¹⁸

Supermarkets are increasingly cementing their role as community anchors through long-term social investment and grassroots partnerships. SuperValu maintains a high-profile presence by sponsoring the Tidy Towns competition and the GAA All-Ireland Senior Football Championship, while also targeting food education for 170,000 children through its "Let's GROW" program. Tesco Ireland balances large-scale logistics with local choice, redistributing surplus food via FoodCloud and funding thousands of neighborhood projects through its "Blue Token" Community Fund and "Stronger Starts" meal initiative. Meanwhile, Dunnes Stores leverages its physical footprint to support local health and social services, hosting national collection drives for charities like Make-A-Wish Ireland and providing essential infrastructure for Enable Ireland. Together, these efforts demonstrate that corporate social responsibility has shifted from a discretionary activity to a baseline consumer expectation across the Irish market.

It is expected that Supermarkets will remain the largest type of grocery retailer in Ireland in value terms despite greater competition from discounters and convenience stores. Across Europe's grocery sector, consumer preferences are increasingly shifting towards smaller convenience store formats, Ireland is no different. Retailers are, however, responding by expanding their network of city centre, smaller footprint stores, catering to the demand for easily accessible shopping options e.g., Tesco Express store format.¹⁹

Dunnes Stores

Founded in 1944, Dunnes Stores is an 82-year-old, family-owned Irish retailer and currently Ireland's number one grocery retailer, holding a 24.3% value market share. The business combines a long-standing heritage with a scale and relevance that continues to resonate strongly with Irish shoppers.²⁰

Dunnes Stores operates 138 stores, offering a distinctive combination of food, fashion and homeware. Larger formats are typically anchored by a dedicated market-style food hall, supported by a broad wine offering and a premium food-to-go or foodservice proposition. The presence of specialist concessions, including James Whelan Butchers and Sheridan's Cheesemongers, further enhances food credentials and reinforces Dunnes' positioning as a quality-led retailer.

The retailer operates a clearly tiered private-label structure, spanning Everyday Savers, the core Dunnes Stores Range, and its premium Simply Better Collection. Simply Better is positioned around clean ingredients, premium quality and strong perception cues, and sits at the heart of Dunnes' food strategy. The range is supported by partnerships such as that with Neven Maguire, who regularly creates from-scratch recipes using Simply Better products, amplified across digital and social channels. More than 90 Irish producers, including Wexford Preserves, now supply the Simply Better range, underlining Dunnes' commitment to Irish sourcing and artisan production.

Brand storytelling and value are central to Dunnes' consumer engagement strategy. The retailer frequently spotlights its smaller food producers through short-form video content and in-store activations, responding to strong consumer demand for local and Irish-produced food. This is complemented by cooking demonstrations and chef-led "Chef-approved" meal solutions using Dunnes ingredients and cookware.

Dunnes Stores' proposition is reinforced by one of the most distinctive promotional mechanics in Irish grocery retail, centered on high-impact money-off vouchers and the VALUEclub loyalty scheme, which rewards spend simply and transparently. Alongside selective acquisitions and partnerships, and continued development of its online proposition through Buymie, Dunnes is well positioned for growth. IGD forecasts suggest the retailer will outperform the wider market, accounting for 17.1% of all additional grocery sales generated in Ireland between 2025 and 2030.²¹

SuperValu

SuperValu is part of the Musgrave Group, a sixth-generation, family-owned Irish business with over 140 years' experience in food retail and wholesale. Headquartered in Cork, Musgrave operates SuperValu alongside Centra and Daybreak in Ireland, with additional wholesale and retail operations in Spain, making it Ireland's largest grocery and food distributor. SuperValu holds a 19.3% share of the Irish grocery market and operates ~223 stores across the Republic of Ireland, with a presence in Northern Ireland.²² The brand positions itself as Ireland's local retailer, operating predominantly through a franchise model of independently owned stores, supported by a smaller number of company-owned locations managed directly by Musgrave.

Fresh food leadership underpins the SuperValu proposition, with a strong focus on quality fresh produce, expert butchery and bakery counters, and close relationships with Irish suppliers. Musgrave invests over €1 billion annually in Irish food, with more than 90% of goods sourced on the island of Ireland, supporting jobs and local economies.²³ This positioning is reinforced through SuperValu's national brand campaign, "The Difference is Real", highlighting trust, authenticity and expertise.

SuperValu continues to invest in modernised store formats, featuring market-style layouts, enhanced fresh food zones and specialist service counters, alongside growing food-for-now and digital capabilities. Loyalty is driven through SuperValu Real Rewards and the Frank & Honest app. While Musgrave is forecast to grow behind the overall market, with a sales CAGR of 1.5% versus market growth of 2.4%, SuperValu's strong community focus and fresh food credentials continue to anchor its relevance in Irish grocery retail.²⁴

Tesco Ireland

Tesco is a leading multinational grocery and general merchandise retailer operating across five markets: Ireland, the United Kingdom, Hungary, the Czech Republic and Slovakia. Entering Ireland in 1997, Tesco has grown to become the country's second-largest grocery retailer, holding a 23.6% market share.²⁵

Tesco operates a fully multi-format retail estate in Ireland, with 190 stores spanning Tesco Extra hypermarkets, core supermarkets, Express convenience stores and Metro formats, supported by the country's largest online grocery operation. In Ireland, Tesco continues to expand delivery and click-and-collect services nationwide, while scaling Tesco Whoosh, its rapid-delivery proposition offering grocery delivery in as little as 45 minutes, reinforcing its strength in convenience-led missions.

Strategically, Tesco focuses on value-led market share growth, targeting long-term share gains towards 30%. In Ireland, this is delivered through Aldi Price Match, Low Everyday Prices and Clubcard Prices, alongside increasing personalisation enabled by Clubcard data. Significant investment continues in digital, AI, automation and unified commerce, creating a seamless omnichannel experience. Operationally, the retailer is pursuing a strong "save to invest" agenda, driving efficiency through simplified store operations, extensive self-checkout and scan-as-you-shop rollout, and streamlined service formats.

Tesco maintains a strong commitment to Irish suppliers and local communities, sourcing from over 500 Irish food and drink suppliers and supporting more than 13,000 farm families, with 100% of fresh chicken, beef, pork and lamb sold in Ireland being Irish-sourced. The retailer has also donated more than €8m through its Community Fund and raised over €9m via its partnership with the Children's Health Foundation.²⁶ Looking ahead, Tesco is forecast to outperform the Irish grocery market, with a sales CAGR of 2.8% versus market growth of 2.4%, driven by above-average store growth in convenience.²⁷

Value Retailers

Aldi (Süd) and Lidl have steadily grown their share of the Irish grocery market since entering in 1999 and 2000, respectively. In Ireland, both operate a softer discount model than in many other markets. Inflationary pressure on household incomes, combined with the breadth of quality Irish food and drink across both retailers' ranges, has made their value-led offer increasingly attractive to Irish consumers.

Sustained growth is predicted in Ireland over the next five years, both in retail value sales and number of outlets. The pair hold a combined share of 24.4% of the grocery retail market in Ireland.²⁸

Investment in the Irish grocery market is forecast to continue, underpinned by significant long-term capital commitments from both Lidl and Aldi. Lidl Ireland has announced a €600 million investment over the five years to deliver 35 new stores alongside a €200 million regional distribution centre in Cork, strengthening its logistical infrastructure across the south and south-east of the country.²⁹ In parallel, Aldi Ireland has committed €400 million to opening 30 additional stores nationwide by 2028–29, signalling continued confidence in expansion-led growth within the Irish market.³⁰

Sustainability and origin of food products is important to Irish consumers. This is reflected in their various sustainability initiatives including the reduction of plastic packaging and an emphasis on reducing their overall environmental impact. However, there is likely to be greater public scrutiny of and demand for sustainability programmes over the coming years leading to a more favourable perception among consumers of those retail players that address these concerns.

ALDI (Sud)

ALDI is a multinational discount retailer with an 11.1%% market share in Ireland. Operating as part of the Aldi Süd group, which covers markets including Ireland, the UK, the U.S. and Australia, ALDI Ireland currently operates circa 165 stores nationwide.³¹

ALDI's engagement with Irish suppliers continues to deepen, with the retailer having spent approximately €10 billion with Irish producers since 1999 and recording a 58% increase in purchasing from Irish suppliers since 2019.³² Reflecting the gastro-nationalistic traits of Irish shoppers, ALDI continues to place emphasis on quality Irish produce, supported by ongoing efforts to broaden its branded and local product range. The retailer also continues to invest aggressively in price reductions across core grocery staples, reinforcing its commitment to maintaining price leadership and its stated ambition to “never be beaten” on price in the Irish market.

A central pillar of ALDI's supplier strategy is its Grow with ALDI programme, delivered in association with Bord Bia. The programme provides mentorship, marketing support and national promotional listings for emerging Irish producers. Since its launch, ALDI has invested over €10m in the initiative, with the 2025 programme featuring 52 products from 29 suppliers, competing for longer-term national listings. The Grow with ALDI platform continues to act as a key route to market for early-stage suppliers, with successful participants often securing repeat or permanent listings based on sales performance.³³

ALDI is also investing to enhance the in-store experience while retaining its no-frills operating model. This includes the rollout of in-store bakeries, now present in around 20 Irish stores, strengthening its fresh food and convenience offer. From a sustainability perspective, ALDI is focused on reducing its carbon footprint, improving energy efficiency, minimising refrigerant impact and cutting waste, including the rollout of rooftop solar generation across 44 Irish stores in 2025, supported by a €5m investment.³⁴ Corporate social responsibility also remains a core pillar of the strategy, with ongoing partnerships with Barnardos and FoodCloud, alongside its role as Official Fresh Food Partner of the IRFU through to 2028. Combined with continued growth outperformance (sales CAGR of 2.6% versus a market average of 2.4%) ALDI remains well positioned to outperform the wider Irish grocery market in the medium term.³⁵

Lidl

Lidl, the multinational discount retailer, entered the Republic of Ireland in 2000 and has since become Ireland's fastest-growing grocery retailer, holding an estimated 14.3% share of the grocery market.³⁶ Lidl operates a highly curated range of approximately 1,400 SKUs, predominantly private label, complemented by a limited but growing selection of branded products. The retailer now operates around 220 stores across the island of Ireland, including c.181 stores in the Republic.³⁷

Lidl's latest Supplier and Business Partner Impact Report further underline the retailer's strong commitment to Irish sourcing, with over €2bn procured from Irish suppliers in 2025, including approximately €1.4bn in Irish agri-food spend, representing a double-digit increase year on year. Around 70% of products sold by Lidl Ireland continue to be sourced locally, with Irish suppliers supported across both food and non-food categories.³⁸

Through its Kickstart supplier development programme, developed in association with Bord Bia, Lidl provides small and medium-sized Irish food and drink producers with an opportunity to secure a trial in-store listing, with potential progression to longer-term supply contracts and access to Lidl's

international network. Since inception, the programme has supported over €37m of investment, while Irish food and drink exports through Lidl's global network exceeded €400m in 2025, reflecting Lidl's growing role as a route to export for Irish producers.³⁹

Sustainability and responsible growth underpin Lidl's long-term strategy. The retailer is pursuing a net-zero pathway, targeting a 70% reduction in Scope 1 and 2 emissions by 2030 and a 35% reduction in Scope 3 emissions by 2034, supported by renewable energy adoption and low-emissions logistics. Lidl opened Ireland's first near-zero-energy retail store in Maynooth in 2025 and has led industry initiatives such as the Deposit Return Scheme, becoming the first retailer to exceed 100 million returns.⁴⁰

Convenience Retailers

Convenience banners in Ireland include Centra, Mace and Daybreak, all part of the Musgrave Group; Spar and Londis, part of the BWG Group; Costcutter and Gala. Convenience retail in Ireland is a dynamic and fast-growing channel, driven by consumer demand for speed, accessibility and quality. This channel represents a significant share of total retail sales, with steady year-on-year growth as consumers increasingly seek quick and efficient shopping solutions. The channel benefits from strong footfalls, particularly in high-traffic areas, contributing to robust sales across categories such as fresh food, beverages, and impulse purchases.

Convenience stores are strategically located across Ireland to maximise accessibility and consumer reach. They are a dominant presence in urban centres, suburban neighbourhoods and key transport hubs, including petrol stations, train stations and city-centre locations. Their widespread distribution ensures that consumers can access essential goods and ready-to-eat meals quickly, whether commuting, working, or traveling. Many stores also serve as community hubs in rural areas, providing essential grocery items and fresh produce where larger supermarkets may not be available.

The in-store experience has evolved significantly in recent years, as retailers adopt technology to improve convenience and efficiency. Self-checkout is now widespread, enabling faster transactions and shorter queues at peak times. Many stores also offer mobile payments, click-and-collect and digital loyalty programmes to strengthen customer engagement. In parallel, premium coffee stations, fresh food-to-go and expanded chilled and hot meal ranges cater to time-poor consumers seeking quality, on-the-go options. As innovation continues, convenience retailers in Ireland are expected to invest further in technology, sustainability and customer-focused solutions to meet evolving demand.⁴¹

Centra

Centra is part of Musgrave Retail Partners Ireland, one of the largest grocery and food distributors in the country. As of April 2026, it operates over 480 convenience stores across the Republic and Northern Ireland. The brand serves over 3 million customers per week. Centra supports the Irish economy by partnering with around 1,800 Irish suppliers, including sourcing its entire own-brand milk exclusively from Irish creameries, and ensuring that its own-brand meat and eggs are born, bred and reared on the island of Ireland. It is also a proud member of Guaranteed Irish, reflecting its ongoing commitment to local sourcing, job creation, and community investment. Centra's network operates under a franchise model, with each store independently owned and run by local retailers, supported by Musgrave's scale in supply chain, store design and technology. The retailer is known for its consistent focus on quality, value and friendly service.⁴²

Spar

SPAR is one of Ireland's leading convenience retail banners, with a heritage spanning more than 60 years. Since opening its first store in Dublin in 1963, the brand has placed convenience and community at its core, continually adapting its offer to meet the evolving needs of Irish consumers. Today, SPAR operates in every county nationwide, supported by a strong network of independent retailers and local partnerships.

The brand forms part of BWG Foods, a leading wholesale and retail group in Ireland. Across its SPAR, EUROSPAR, Mace, Londis and XL formats, BWG works with independent retailers across a network of over 1,000 convenience-focused stores. SPAR alone provides employment for approximately 14,000 people locally, underlining its role as a key contributor to local economies and communities across the country.⁴³

Premium Grocery Retail

Donnybrook Fair

Founded in 1999, Donnybrook Fair is a premium gourmet food retailer specialising in fresh foods such as deli meats, bakery products, fruit & vegetables, and fresh cuts of meat, alongside a wide range of ambient products. Now part of the Musgrave Group, Donnybrook operates three locations across Dublin. Each store features an artisan butcher, a served fresh seafood counter, coffee to go and extensive ranges of handmade deli foods, supported by a full grocery offer. Donnybrook Fair also operates several cafés. Selected Donnybrook Fair meal solutions are now available in several SuperValu supermarkets nationwide, increasing brand awareness and reach among Irish consumers.⁴⁴

Avoca

Founded in 1723, Avoca is a clothing manufacturing, retail and food business with a strong heritage in Irish craftsmanship. It operates 14 stores and cafés across Ireland, many of which incorporate large food halls offering a premium grocery and food-to-go proposition. Avoca is part of the Aramark Corporation, the US-based foodservice, facilities and uniform services provider. The brand offers a broad range of own-label products, including freshly baked goods, prepared meals and preserves produced in-store or through its central kitchen, alongside a curated selection from artisan producers.

Key Insights and Drivers in the Irish Grocery Retail Market

Sustainability

Sustainability is increasingly shaping competitive dynamics in Irish grocery retail, with shoppers, regulators and retailers demanding greater transparency, traceability and visible progress on environmental outcomes. However, the ability to pay remains a key constraint. While stated willingness to pay a premium varies by study and category, Ireland-specific evidence highlights the affordability challenge: PwC's 2025 Irish Voice of the Consumer study finds that 37% of Irish consumers say they are willing to pay more for food that supports the environment.⁴⁵ For retailers, this creates a dual imperative: sustainability must be both credible and easy to understand at shelf (e.g., clearer packaging, fewer and more trusted claims) while also being delivered in a way that does not materially worsen price perception. In practice, this dual imperative is best realized through visible material reduction and "Plain English" messaging on everyday goods. Retailers like Lidl and Aldi maintain their value-leader status by using bold, front-of-pack claims such as "100% Recyclable" or "Plastic Removed," which signal progress without the "premium-green" aesthetic that often triggers price anxiety; Lidl's Maynooth store (Ireland's first net zero supermarket) adds further proof points without undermining the value proposition.

Regulation is also accelerating sustainability action. The EU's Packaging and Packaging Waste Regulation (PPWR) (Regulation (EU) 2025/40) entered into force on 11 February 2025 and will generally apply from 12 August 2026, raising expectations on packaging design, recyclability and waste prevention across grocery.⁴⁶ In parallel, evolving sustainability reporting requirements are increasing scrutiny and data demands across supply chains. Consumer expectations continue to rise. RED C's Consumer Sustainability Monitor (March 2026) finds a strong and growing expectation that brands should take a leadership role in helping people live more sustainably, with transparency and clear proof of action increasingly critical to building consumer trust—particularly among younger adults.⁴⁷ Bord Bia's Origin Green programme continues to support food producers in meeting these expectations, reinforcing Ireland's reputation for sustainable food production.

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Local Provenance

Local sourcing continues to play a central role in Irish grocery retail, reflecting both shopper expectations and retailers' efforts to strengthen supply chain resilience. Recent consumer research shows that quality, freshness and trust remain critical drivers of food choice in Ireland; PwC's Irish Voice of the Consumer Survey 2025 found that 57% of Irish shoppers are highly concerned about food quality and production standards.⁴⁷ Against a backdrop of geopolitical instability, climate highlight events and ongoing cost volatility, retailers are reviewing category sourcing to reduce risk exposure and reliance on distant supply chains. In practice, this is translating into expanded Irish ranges, clearer origin labelling and deeper partnerships with domestic suppliers—visible across retailers through clearly badged Irish ranges and structured supplier programmes, such as SuperValu's Food Academy 'Taste of Local' spotlighting emerging producers (e.g. Homespun chicory syrup; Zingibeer ginger beer), Lidl's Kickstart trialling new Irish-made brands with potential longer-term listings (e.g. Mary-Ellen's Meadow; The Smokin' Butcher), ALDI's Grow with ALDI platform providing a route to market for emerging suppliers, Dunnes Stores' Simply Better range emphasising premium Irish provenance via named local producers (e.g. Wexford Home Preserves), and Tesco Ireland's Made in Ireland navigation improving the visibility of Irish-origin lines across fresh categories.



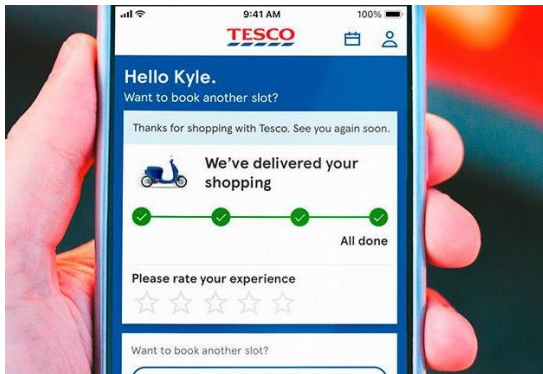
Provenance remains especially influential in fresh categories, notably meat, dairy and fresh produce, where quality, freshness and trust materially shape purchase decisions. In these categories, clear origin cues, welfare and sustainability assurances, and credible traceability help shoppers feel confident about what they are buying and who produced it, particularly when price promotions or private-label options narrow traditional quality signals. Consumers are highly familiar with, and place strong trust in, the Bord Bia Quality Assurance Mark, which signals quality, sustainability standards and full traceability back to an Irish farm—reinforcing Ireland's distinctive provenance advantage at shelf. In Q1 2026 Bord Bia's most recent Quality Mark Retail Audit, 98% of beef, 79% of chicken, 100% of lamb and 82% of pork carried the Quality Mark on pack. In Q1 2026, the proportion of facings carrying the Bord Bia Quality Mark ranged from 86% in Aldi and 82% in Lidl, to 78% in Dunnes Stores, 74% in Tesco and 72% in SuperValu, indicating consistently high Quality Mark presence across the major grocery retailers.⁴⁸

Omnichannel

Irish grocery retail is rapidly embracing an omnichannel approach as shoppers expect seamless journeys across in-store, online and mobile touchpoints. Major retailers are investing further in convenience-led formats, while discounters continue to gain momentum, prompting ongoing changes to store layouts that better serve busy, mission-driven shoppers. E-commerce, personalised recommendations powered by data, and frictionless payment technologies are now integral to the grocery landscape. According to Kantar, online grocery sales accounted for a record 6.9% of total market share in February 2025, up from 5.8%, highlighting the lasting impact of pandemic-driven shopping habits.⁴⁹ Over the latest 12-week period, more than 19% of Irish households bought groceries online, with online sales growing at double-digit rates year over year, fuelled by more frequent shopping trips and larger basket sizes.⁵⁰

Rapid fulfilment is a key omnichannel enabler. In practice, Irish shoppers can now order groceries through multiple routes: (1) retailers' own websites and apps for scheduled home delivery and click-and-collect; (2) rapid-delivery propositions such as Tesco Whoosh for top-up missions; and (3) third-party delivery marketplaces and restaurant platforms that increasingly carry grocery and convenience ranges (e.g., Just Eat and similar services), alongside retailer partnerships (e.g., SuperValu via Uber Eats). This broad access is helping make food and grocery delivery a mainstream part of everyday shopping in Ireland, with over 41% of Irish internet users using online food delivery services each month, placing Ireland among the highest penetration markets in Western Europe.⁵¹ Importantly, this level of usage reflects habitual, repeat behaviour rather than one-off trial, with grocery and meal ordering increasingly converging on the same digital platforms. In response, retailers are embedding delivery and click-and-collect within core operations, supported by AI-led forecasting, inventory optimisation and substitution logic to improve availability and picking accuracy. For suppliers, growth in convenience and rapid missions increases the need to review range, pack sizes and formats.⁵¹

Stores remain central, so retailers are linking in-store speed with digital engagement through self-checkout and scan-and-go, tied to shopper accounts, digital receipts and personalised offers. AI is increasingly used for forecasting, pricing and personalisation, improving labour efficiency and reducing friction, while deepening loyalty through more relevant communications. With volume growth slow and margins tight, retailers are also expanding retail media and broader digitisation, creating new monetisation and brand engagement touchpoints. Overall, Ireland is moving towards more integrated experiences that connect discovery, purchase, fulfilment and loyalty across channels.



Consumer Centric

Irish grocery retailers are increasingly aligning with consumer priorities around value, convenience, quality and health, as cost-of-living pressures continue to shape behaviour. In 2025, 71% of Irish consumers reported being extremely or very concerned about the cost of food, with price cited as the most important purchase driver, accelerating switching towards value-led and private-label options. At the same time, shoppers continue to prioritise convenience and quality, with strong demand for fresh, accessible meal solutions alongside everyday value. Health and wellness has become a core influence on grocery choices, with 57% of Irish consumers concerned about the health impacts of ultra-processed foods, 47% planning to increase fresh produce consumption, and 30% willing to switch brands for health benefits. This is driving momentum behind functional, clean-label and better-for-you products, intensifying retailer investment in health-focused ranges while increasing pressure on brands to differentiate through credible benefits, innovation and trust.⁵²

Final Remarks

As Ireland moves through 2026, the grocery retail market remains resilient yet highly competitive, underpinned by favourable demographic and labour market fundamentals but constrained by persistent cost-of-living pressures and elevated external risk. Discounters continue to gain relevance as value remains paramount, while full-service and premium retailers focus on defending share through sharper pricing, fresh food excellence, provenance, convenience and omnichannel investment. Sustainability, local sourcing and community engagement have become baseline expectations rather than differentiators, intensifying the need for credible, cost-effective delivery. Overall, market growth is set to be steady rather than expansive, with success increasingly dependent on operational efficiency, proposition clarity and the ability to balance affordability with long-term strategic investment.

Report Author

This report was prepared by Bord Bia – The Irish Food Board, the Irish government trade agency for the food and drink industry. Our role is to contribute to the sustained success of Irish food and drink, and we take great pride in the sector's produce, its people, its place and its progress. We focus on supporting and enabling our clients (producers and farmers) to perform at their best - bringing Ireland's outstanding food, drink and horticulture produce to markets worldwide.

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