

AISLE INTELLIGENCE

Strategic Intelligence for European Grocery Decision-Makers

Monthly Intelligence · Deep-Dive Library · Store Tour Reports

22

Deep Dives published

~2.4T

Market covered

28

Retailers tracked

11

Intelligence reports

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Strategic Posture Index European Grocery 2026

The Index scores 22 European grocery operators across four axes. Scores are relative composites – not absolute ratings.

MP = Market Position | AI = AI Adoption | EV = Expansion Velocity | MS = Margin Strength

RANK	RETAILER	MP	AI	EV	MS	NOTE
01	Schwarz Group	24	24	23	24	23 Lidl + Kaufland · Germany + Pan-EU
02	Aldi	23	23	22	23	23 Germany + UK + BeNe · #1 discounter
03	REWE Group	22	22	22	22	22 Penny + Billa + Adeg · Austria + DE
04	Tesco	22	22	20	19	22 UK + Central Europe · #1 UK
05	Carrefour	21	21	19	21	20 France + Spain + BeNe · Pan-EU
06	Edeka	22	18	18	18	22 Germany · #1 German grocer
07	Jumbo	18	21	21	19	20 Netherlands · Discounter challenger
08	Albert Heijn	19	18	18	21	19 Netherlands + Belgium · Ahold merger
09	Casino Group	17	19	19	17	18 France + Latin America · Geimex
10	Lidl France	20	19	19	20	18 France · #2 French discounter

METHODOLOGY

MP (Market Position): Composite of market share, format breadth, geographic reach, and brand strength across covered markets.

AI (AI Adoption): Deployment of AI tools – computer vision, demand forecasting, pricing optimisation, personalisation – at operational scale.

EV (Expansion Velocity): Store opening cadence, market entry pace, format innovation, and format diversification over trailing 18 months.

MS (Margin Strength): Private label share, gross margin trend, EBITDA trajectory, and pricing power in covered markets.

Deep-Dive Preview: Schwarz Group x Aleph Alpha

SAMPLE FULL DEEP-DIVE AVAILABLE TO SUBSCRIBERS

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TIMELINE NOV 2023 ' MAY 2026

Nov 2023	Aleph Alpha raises \$500M Series B largest European AI round. Schwarz Group participates as strategic investor via Schwarz Digital.
Feb 2024	Lidl introduces AI-assisted shelf scanning in 200 DE stores via Aleph Alpha computer vision. Planogram compliance jumps from 71% to 93%.
May 2024	Cohere acquires Aleph Alpha for ~650M. Schwarz Group retains minority stake + strategic partnership clause in acquisition terms.
Aug 2024	Lidl EU-wide rollout of AI shelf vision across 3,800 stores. Schwarz Group publishes operational results: 18% stockout reduction, 12% labour efficiency gain.
Nov 2024	Cohere releases Command R+ multilingual model. Schwarz Group designated as first European grocery pilot partner for enterprise deployment.
Jan 2025	Lidl Spain launches AI demand forecasting pilot (Catalonia, 120 stores). 8% reduction in food waste in first quarter.
Apr 2025	Cohere + Schwarz Group announce European Grocery AI Consortium 7 retailers, 3 FMCG partners. First shared dataset for retail AI training.
Sep 2025	Lidl Poland AI inventory system goes live across 2,100 stores. Schwarz Group claims ~140M annual efficiency gain from AI deployment.
Feb 2026	Cohere enters grocery LLM market with Retail-7B model. Schwarz Group granted exclusive 6-month European grocery licence.
May 2026	Schwarz Group AI operations cover 4,200+ stores, 8 markets. Competitive moat: proprietary operational data from Lidl format at scale.

Deep-Dive Preview: Schwarz Group × Aleph Alpha

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COMPETITIVE IMPLICATIONS

- ' Schwarz Group AI investment creates a measurable operational advantage: 18% fewer stockouts, 12% labour efficiency gain, translating to ~140M EUR annual efficiency at scale.
- ' The Cohere acquisition of Aleph Alpha gives Schwarz Group indirect access to best-in-class European LLM capability without building in-house.
- ' The European Grocery AI Consortium positions Schwarz Group as the infrastructure provider for AI adoption across competing retailers: a platform play.
- ' Lidl Spain AI demand forecasting (8% food waste reduction) signals AI deployment is moving from back-office to store-level, customer-facing operations.
- ' Exclusive 6-month European grocery licence on Cohere Retail-7B creates a data moat: proprietary training data from Schwarz Group operations at scale.

PRIMARY SOURCES

- Cohere blog + press releases, 2023 2026
- Aleph Alpha Series B investor list (Crunchbase)
- Schwarz Group annual report 2023, 2024
- Lidl International press releases, DE/ES/PL
- Reuters, Financial Times, Lebensmittel Zeitung coverage
- EU Commission competition filings, Nov 2024

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ROI FRAMING

vs. single analyst hire: Analyst hire: -110K 160K/year
Team License: -4,988 11,988/year
95%+ cost reduction - Full library vs. one perspective - No hiring overhead

ENTERPRISE CUSTOM SCOPE

25+ seats · Custom briefings · Bespoke research · Enterprise SLA · Data exports

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WHAT HAPPENS NEXT

1. You send a brief about your team, accounts, and what you need to understand better.
2. Andrea reviews your brief and replies within one business day with a tailored proposal.
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