

The background of the slide is a dark green surface covered with various fresh fruits and vegetables. These include apples, blueberries, raspberries, carrots, celery, lemons, pomegranates, radishes, avocados, ginger, garlic, tomatoes, and nuts. The produce is scattered around the central text, creating a vibrant and natural aesthetic.

The Availability Effect: Why trust, margin and loyalty start at the shelf edge

Introduction

Availability is a hidden battleground of grocery retail. While price and quality dominate headlines, what ultimately defines shopper trust is reliability. This means consumers finding what they came for, every time. The UK grocery industry is widely regarded as one of the most sophisticated and operationally disciplined in the world, yet even in such a finely tuned system, small inconsistencies can have a disproportionate negative impact.

Every day, millions of transactions depend on the precision of supply chains, forecasting systems, and store execution. When these falter, the effects are immediate and visible. One in five UK grocery trips involve at least one out-of-stock item – that’s around **930 million shopping visits each year** where customers leave without something they wanted. Across the sector, that equates to roughly **£2.1 billion in displaced sales**, alongside longer-term risks to brand trust and customer loyalty.



One in five UK grocery trips involve at least one out-of-stock item

This study brings together in-store audits, a nationally representative survey of 2,000 UK households, and economic modelling to quantify the scale, cost, and behavioural impact of availability. It provides a holistic view of how stock gaps emerge, how they shape shopper sentiment, and what retailers can do to mitigate them.

The findings reveal that availability now sits at the intersection of customer experience, efficiency, and brand trust. In a market where consumer expectations are rising, margins remain under pressure and shopper missions are fragmenting, even small stockouts can quickly undermine long term confidence. Availability has become both a test of execution and a proxy for reliability.

The report is structured around three sections:



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Lessons from the shelf edge:

Unveiling the results of the store audit and quantifying the scale of the challenge, exploring why small gaps create big risks and mapping shopper tolerance thresholds.



PAGE 8

The consumer reality:

Analysing survey data to examine expectations, tolerance and trust, and identifying five key trends shaping shopper priorities.



PAGE 22

Turning availability into advantage:

Outlining strategic priorities for grocery retailers to strengthen resilience, rebuild confidence, and transform consistency into a competitive edge.

Availability is no longer a background measure of efficiency - it is a frontline test of trust, loyalty, and performance in modern grocery retail.



Section one: Lessons from the shelf edge

UK grocery runs on one of the most sophisticated supply chains in the world. Tens of thousands of products flow through multi-temperature networks every day, and shelves are continuously replenished to tight schedules. The precision required to maintain this rhythm is extraordinary – and it shows.

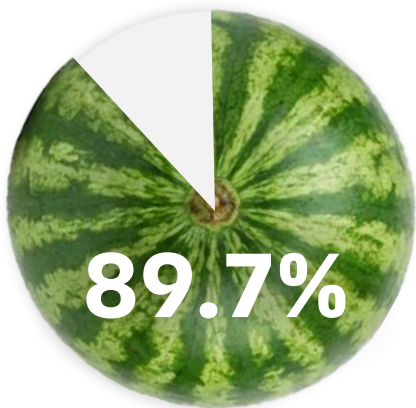
Our national audit found an **average on-shelf availability rate of 89.7%**, rising to **97.1% when comparable substitutes were included**. This consistency reflects a sector that has mastered operational complexity at scale. Yet even within this high-performing system, small differences in availability translate directly into commercial impact. When scaled across the UK’s £180 billion in-store grocery market, minor gaps add up quickly.

Drawing on store audit results and consumer tolerance modelling, our study shows **£2.1 billion of grocery sales each year are at risk from stock gaps** – sales either lost outright or displaced to competitors as shoppers switch stores, delay purchases or trade down.

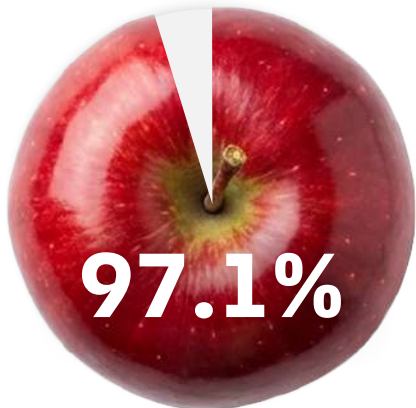
That risk is far from theoretical. **Around one in five grocery trips involves an out-of-stock item – equivalent to roughly 930 million shopping visits each year where shoppers can’t find something they want**. While these experiences are often brief, psychologically, they can leave a lasting impression, reinforcing how even small inconsistencies can shape perceptions of reliability.

Even though such gaps account for a small share of transactions, their impact on shopper experience is disproportionate. Today’s consumers have grown accustomed to instant gratification and plentiful choice, expecting products to be available when they need them. In this context, availability has become a quiet but powerful differentiator: a margin of just one or two percentage points in on-shelf performance can make a significant difference to trading results and customer loyalty.

Shelf availability rate



Average overall availability %



Average availability with substitutes %



930 million

Annual UK grocery trips with at least one item out-of-stock



£2.1 billion grocery sales at risk each year from stock gaps

Source: Retail Economics, DHL Supply Chain



How we measured stockouts

Retail Economics conducted in-store audits across 100+ store locations nationwide, across a mix of retailers, formats and regions. Each audit assessed 40 high-frequency grocery items across fresh, ambient and household categories to reflect a typical weekly household shop.



100+ store locations nationwide



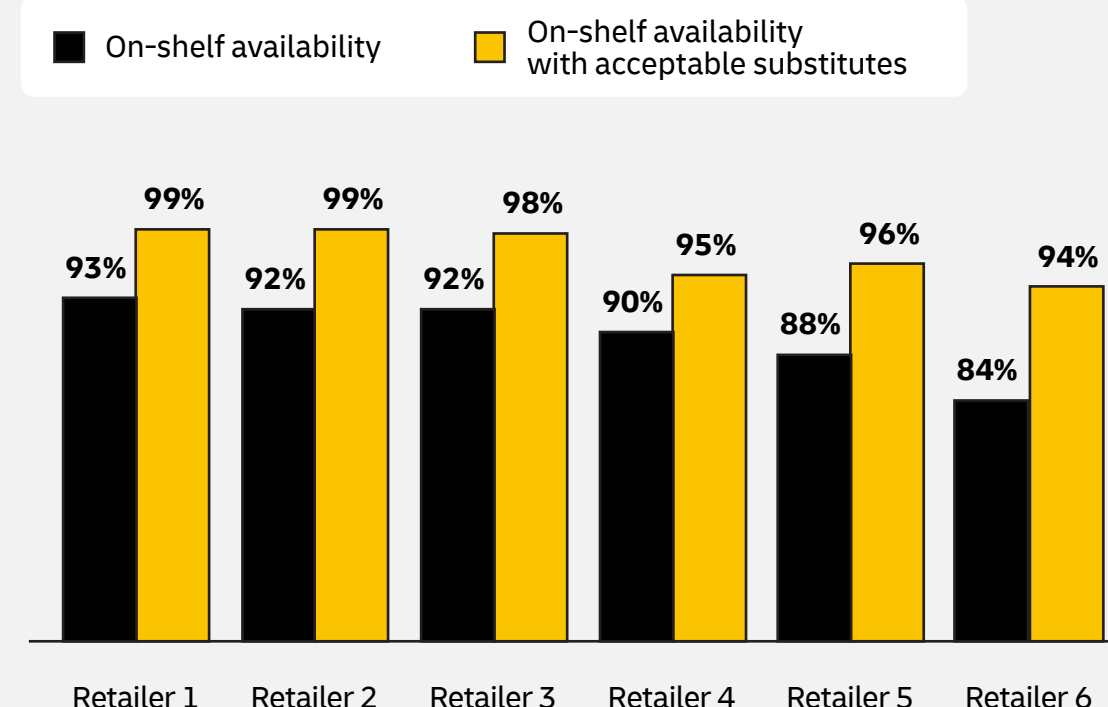
40 high-frequency grocery items

Availability snapshot

Availability across UK grocery remains high but uneven. The research exposes clear variation by retailer, format, region and day of the week – showing where operational pressures collide with rising shopper expectations for immediacy. Shelf-edge precision now hinges as much on timing, format and product mix, as on supply-chain efficiency. Consistency across stores and throughout the week has become a defining measure of retail execution excellence.

Availability by retailer

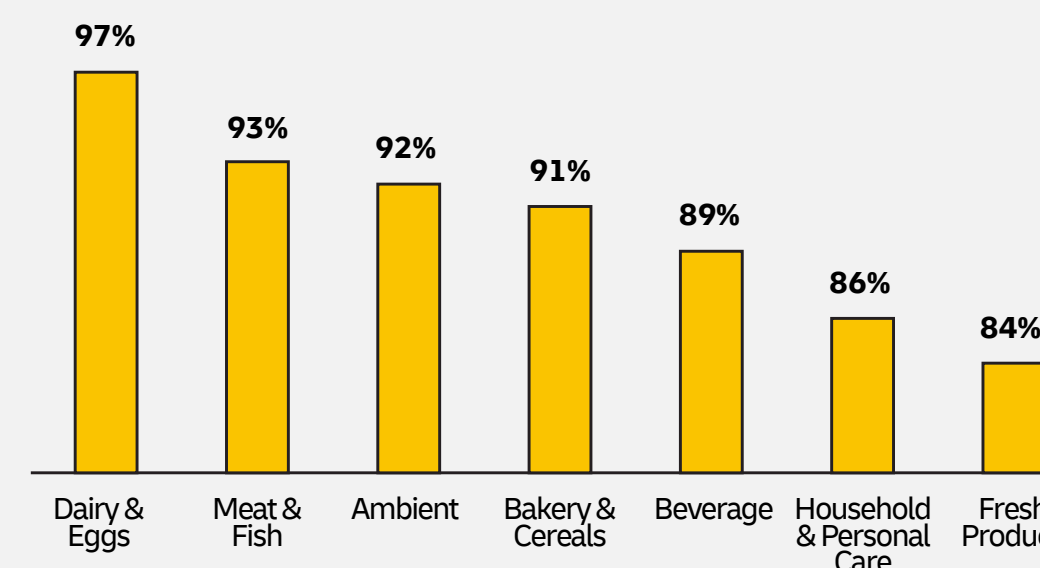
On-shelf availability varies across retailers, reflecting differences in format mix and supply chain execution.



Retailer 1 leads at around 93%, with Retailer 2 and 3 close behind, while Retailer 6's lower score reflects the complexity of smaller convenience formats. Including acceptable substitutes, most achieve above 95% effective availability overall.

Availability by product category

Availability varies by category due to differences in shelf life, handling, and in-store range. Fresh produce is most exposed to short-term gaps driven by tight replenishment cycles, short product life, and limited buffers in smaller stores. Household and personal care items also sit lower, as slower turnover and bulkier packs lead retailers to carry leaner volumes with less room for disruption. In contrast, ambient groceries and staples benefit from stable demand and optimised restocking, supporting strong on-shelf availability.

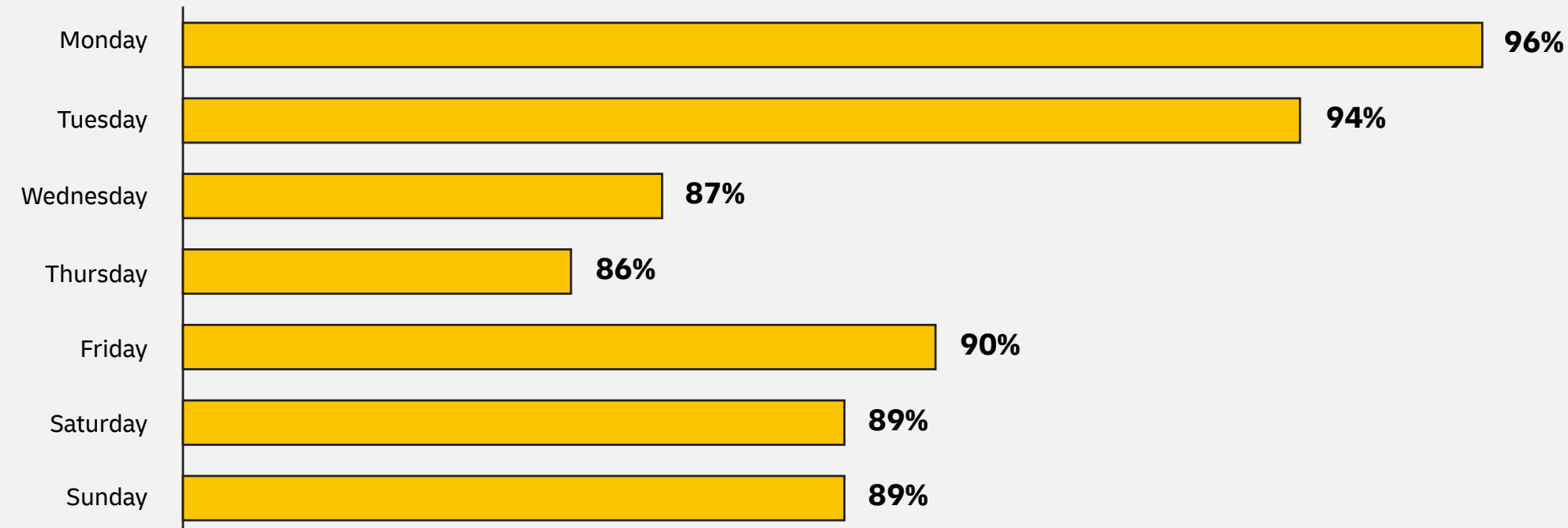




Availability by day of the week

Availability peaks early in the week as stores recover from weekend trading and fresh deliveries enter the network. Midweek dips reflect lighter delivery volumes, leaner replenishment schedules,

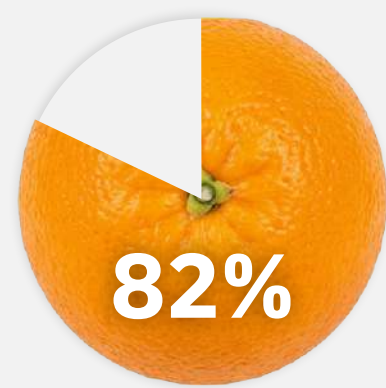
and promotional changeovers that can temporarily disrupt shelf stability. Levels rise again heading into the weekend as retailers rebuild stock ahead of higher footfall.



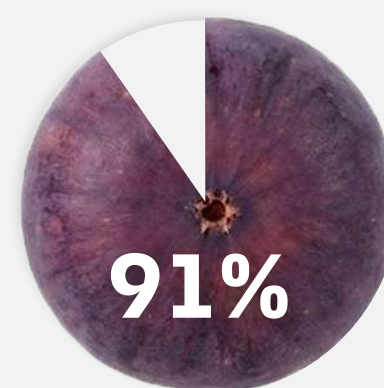
Availability by store format

Availability improves with store size, driven by differences in storage, delivery frequency, and operational support. Supermarkets and hypermarkets benefit from larger backrooms, advanced replenishment

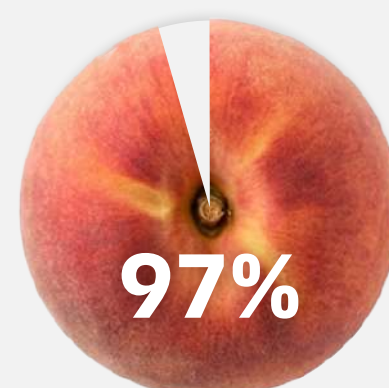
tools, and dedicated teams, allowing faster response to gaps. Convenience formats have smaller ranges, limited storage, and centralised ordering, so even minor delays or demand shifts can quickly translate to shelf gaps.



Convenience stores



Supermarkets

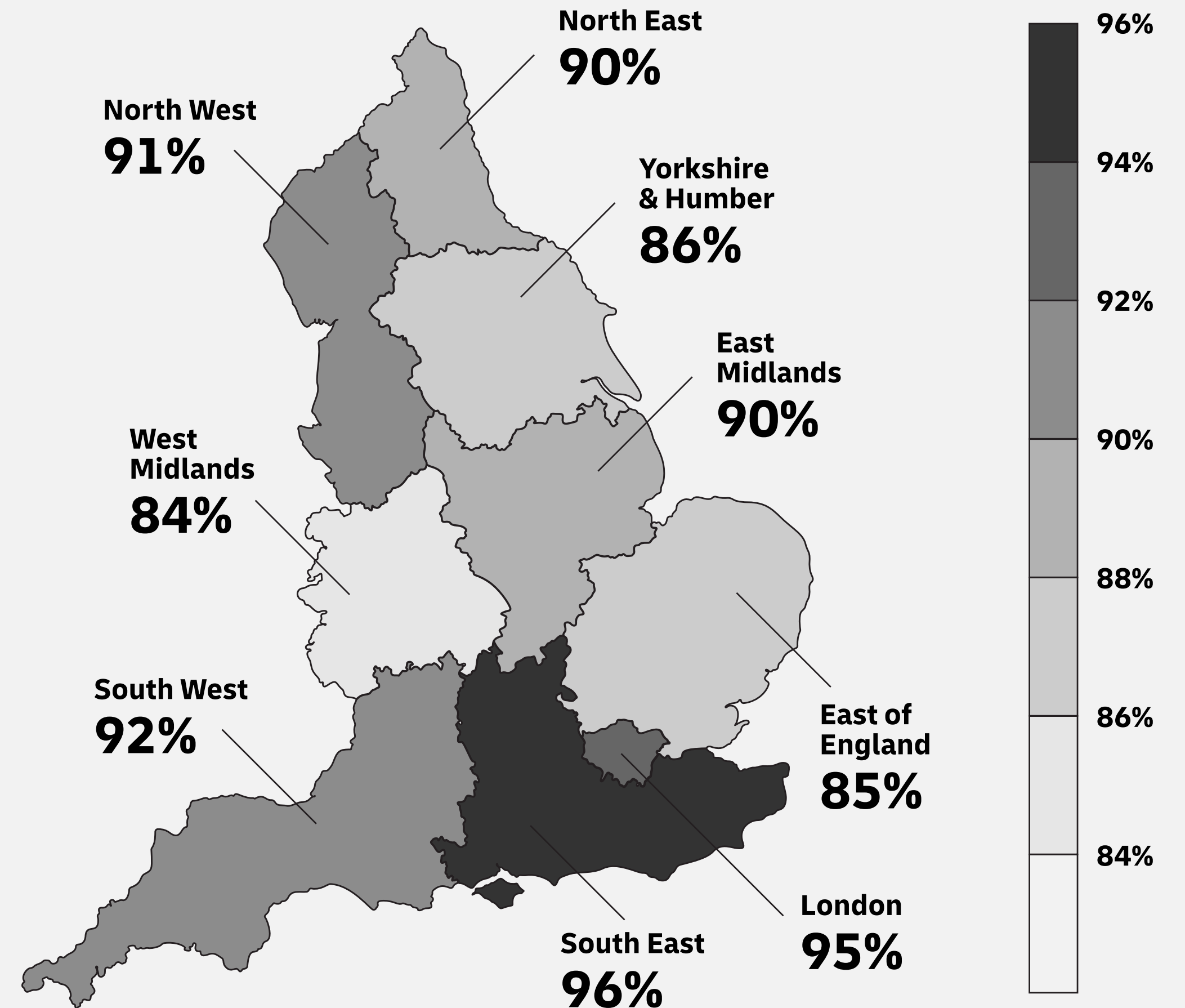


Hypermarkets

Availability by region

London and the South East show the highest availability, supported by dense store networks and robust delivery infrastructure. Frequent replenishment and proximity to distribution hubs sustain strong shelf

performance in these high-demand areas. Elsewhere, availability remains broadly stable, reflecting a resilient national model across diverse geographies.





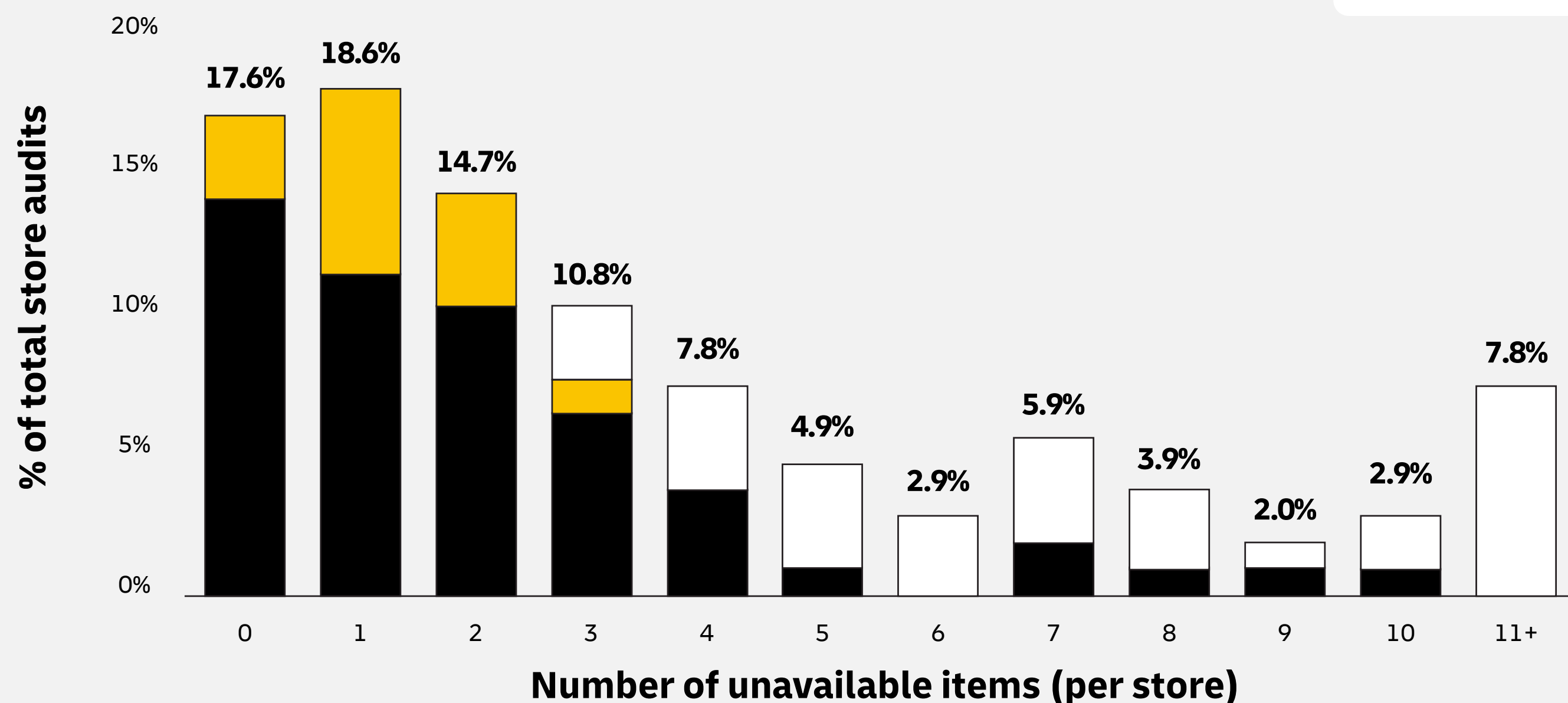
Shopper tolerance to stock gaps

Our research highlights how quickly consumer patience runs out when encountering missing items. While overall availability remains high, even small gaps can have a noticeable impact on trust – particularly for the main weekly shop. Multiple ‘out-of-stock’ moments on a single trip can quickly escalate frustration, damaging perceptions of reliability and loyalty.

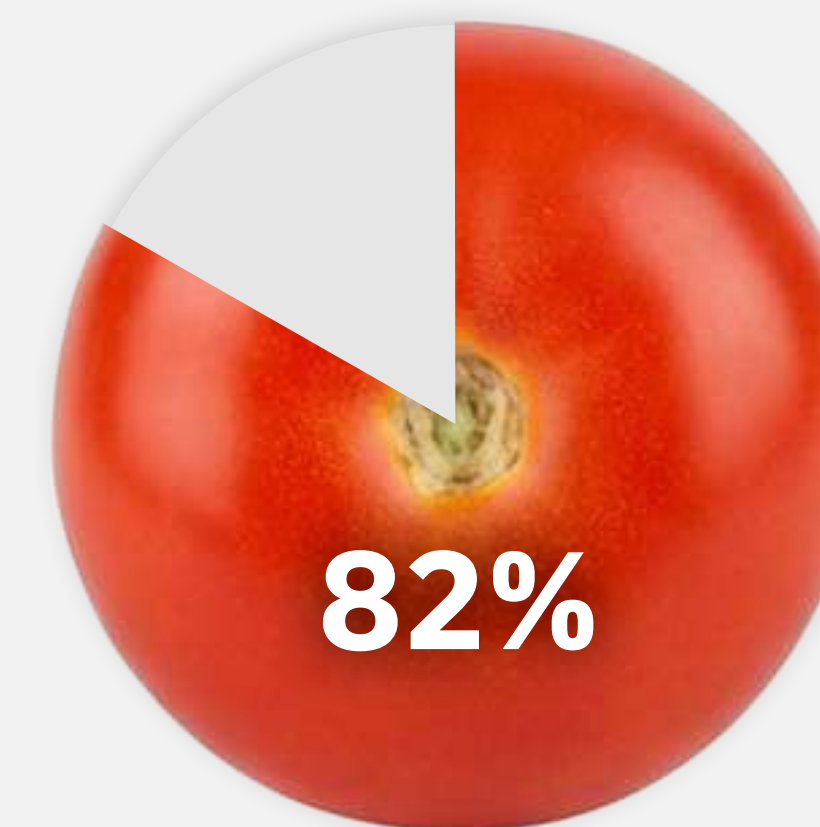
Across all audits, **82% of stores** had at least one item missing from a typical weekly shop, and nearly two-thirds (64%) recorded two or more missing items. Smaller-format stores were most exposed, with limited ranges, lean staffing, and faster turnover heightening the risk and visibility of gaps.

Distribution of unavailable items recorded per store visit

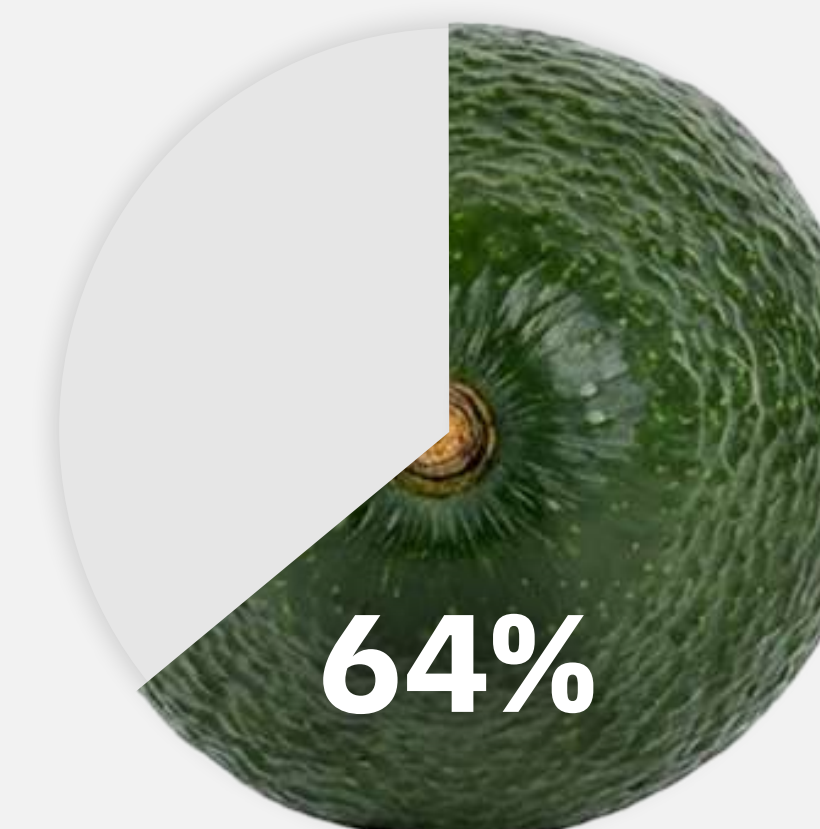
82% of stores had at least one item missing from a typical weekly shop, with smaller formats showing greater exposure to higher counts of missing lines.



Data may not total 100% due to rounding.
Source: Retail Economics, DHL Supply Chain



Stores missing at least one item from a typical weekly shop



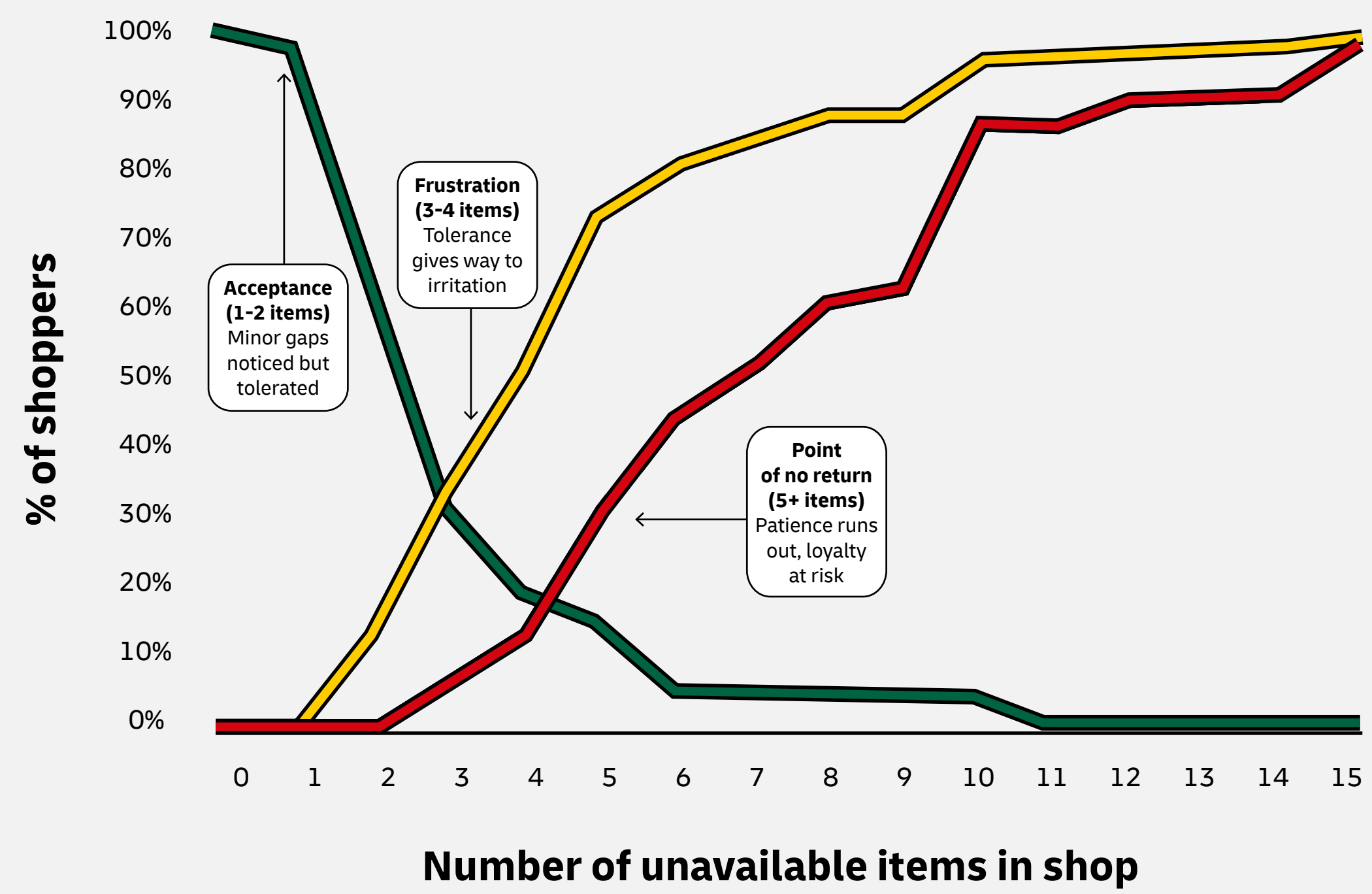
Stores recording two or more missing items



To understand how these results translate into shopper behaviour, we modelled shopper tolerance using a Van Westendorp analysis approach –

identifying the point at which the experience of missing items shifts from acceptable to frustrating, and ultimately, to the point of no return.

Frustration builds fast when shelves fall short: Shopper tolerance curve for unavailable items



Source: Retail Economics, DHL Supply Chain

Three thresholds

Applied here, it reveals three clear behavioural thresholds:



Acceptable (1-2 items missing)

Minor irritation; most shoppers continue as normal. Around half of stores sit within this range.



Frustration (3-4 items missing)

Gaps become noticeable and erode confidence, though most shoppers would still return. Roughly one in five stores fall here.



Point of no return (5+ items missing)

Patience collapses; shoppers are unlikely to revisit. Around 30% of stores, largely smaller formats, fall into this high-risk zone.

Availability remains one of the strongest markers of trust in grocery retail. Increasing unavailability, leads to quickly escalating frustration. Closing even marginal gaps can shift stores back into the acceptable range, protecting sales and reinforcing the reliability that keeps shoppers coming back.



Section two: The consumer reality – expectations, tolerance and trust

This section examines how shoppers experience and interpret stock gaps in practice, from how much they notice and tolerate them, to how these moments shape perceptions of value and trust. It explores five behavioural themes that reveal what availability really means to consumers today, and how these expectations influence loyalty.

Reliability redefined: Availability at the core of value perception

Availability has always been a pillar of grocery excellence, but its influence on where consumers shop is now more visible. In this context, it reflects not just whether a product is on the shelf, but whether a retailer can deliver consistently across stores, categories and missions.

Our research shows that **one in three consumers now rate product availability as more important than price** when deciding where to shop. This doesn't signal a decline in price sensitivity; it highlights that reliability defines whether value is delivered in practice. A well-curated range or sharp price point only matters if shoppers can complete their shop.

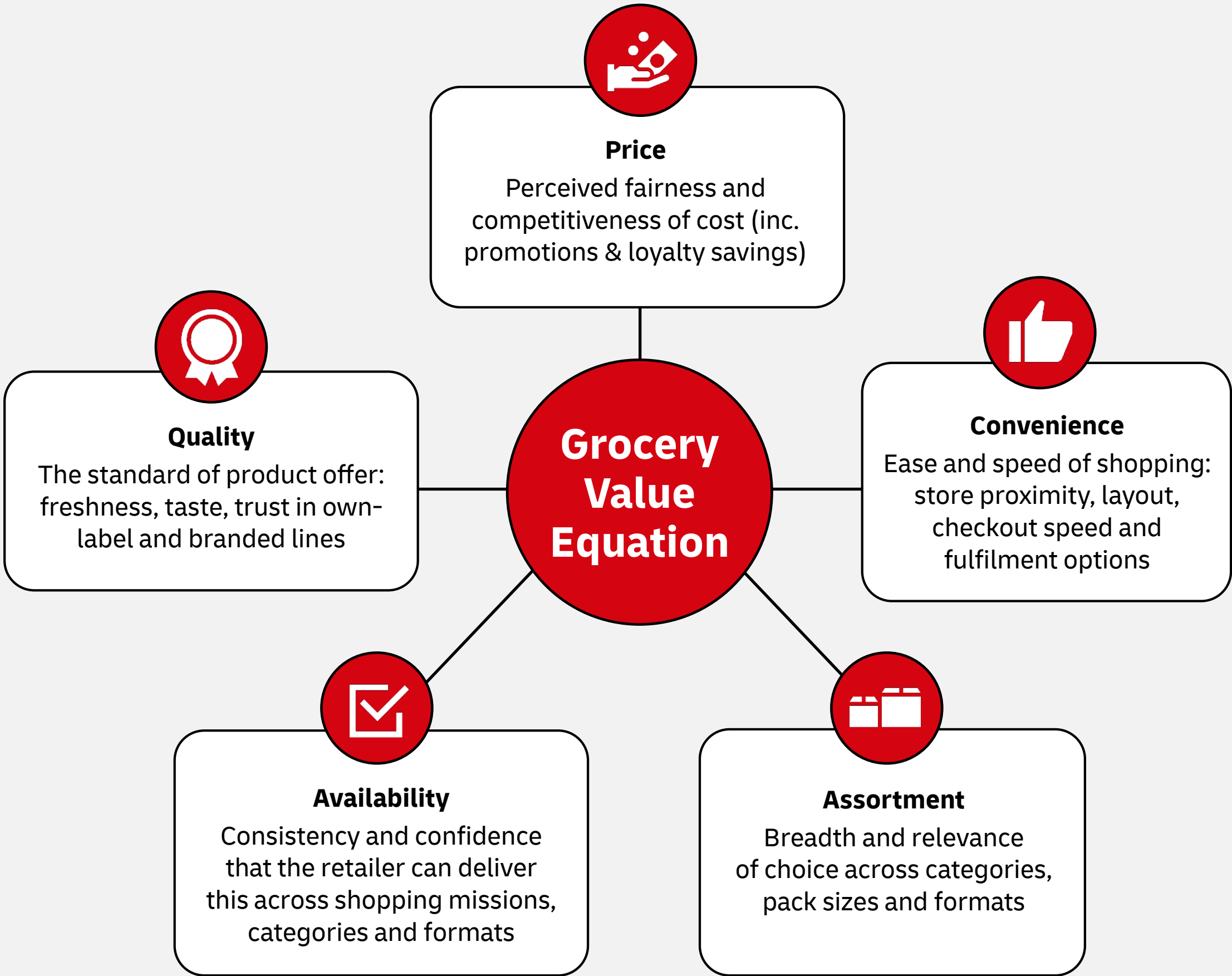


1 in 3 consumers look
for availability over price

Today, shopper value extends beyond price. Reliability underpins the five pillars of perceived grocery value (as seen in the below diagram). If shoppers can't buy the deal, the deal doesn't matter.

Availability carries extra weight for young families with children and affluent households - high-spend and high-frequency shoppers. These customers

typically have larger basket sizes and plan fuller missions, making them more exposed to out-of-stocks. For time-pressed households balancing work, family and rising living costs, a missing item isn't just a minor irritation. It can mean making additional trips, changing meal plans, or disappointing a child!



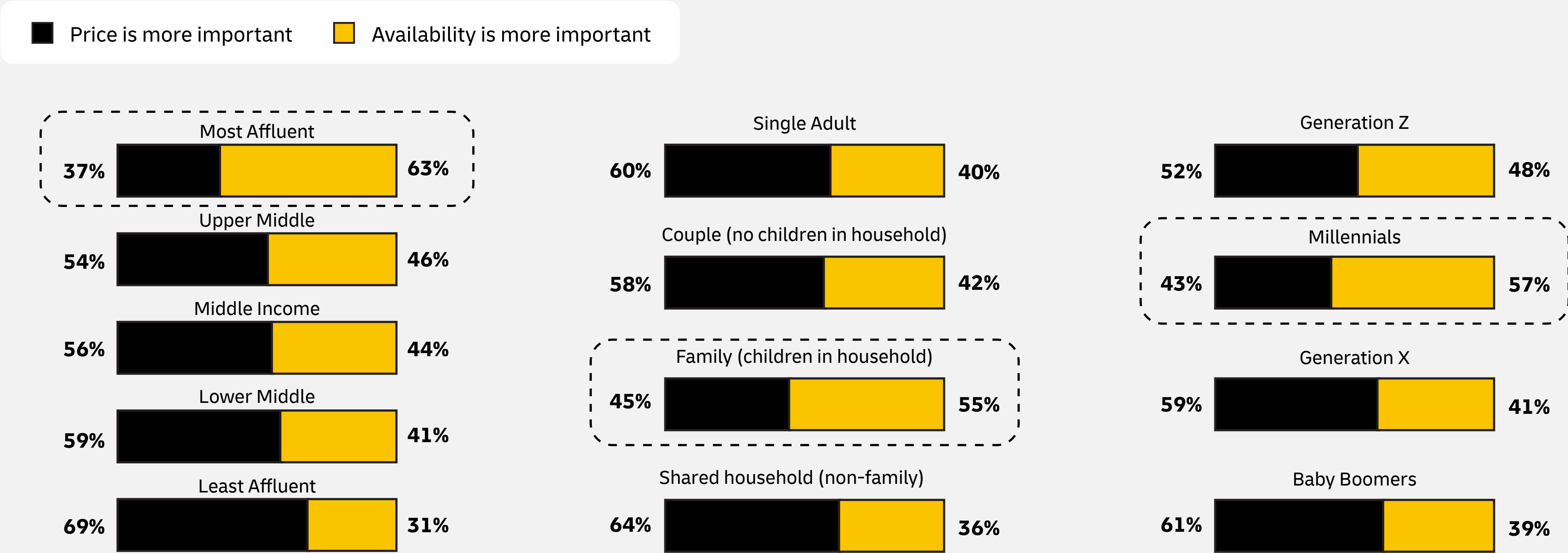
Source: Retail Economics, DHL Supply Chain



Availability often a deciding factor in where people shop

One in three shoppers say product availability is more important than price when deciding where to shop, with the share rising sharply among affluent and family households.

All these factors shape long-term perceptions of reliability. These groups are twice as likely on average to describe stock gaps as a ‘deal-breaker’, prompting them to question reliability and shopping elsewhere.



Source: Retail Economics, DHL Supply Chain

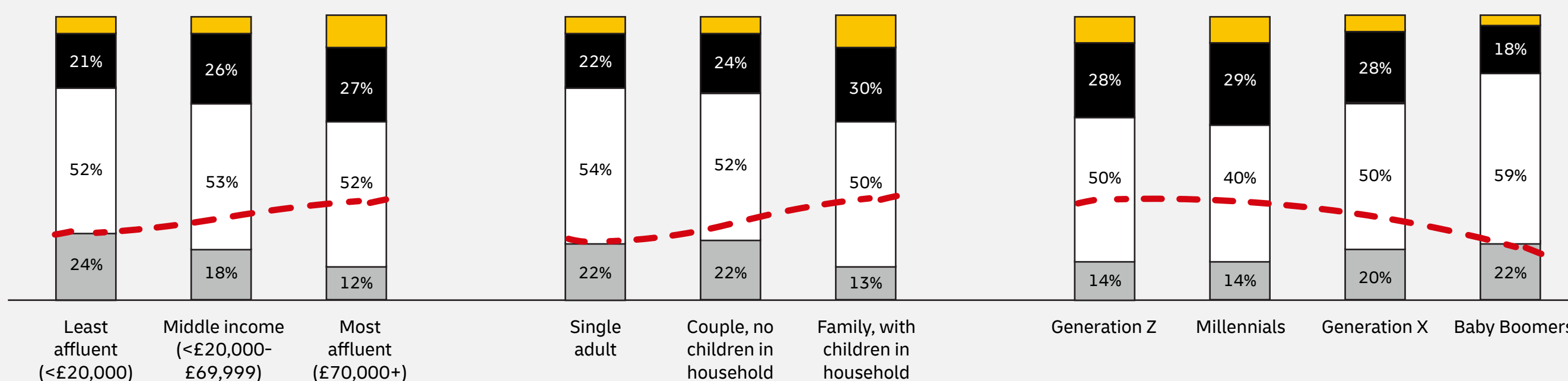


How missing items shape perception

Families with children and younger households are most likely to feel frustrated by stock gaps, reflecting higher expectations for speed and reliability.

Which of the following statements best describes how you usually feel if items you want are unavailable when shopping in a supermarket?

- It's a deal-breaker - makes me question the store's reliability and consider shopping elsewhere
- It's a small inconvenience - I usually find an alternative
- It's frustrating - and usually means making another trip or changing plans
- I don't mind - it doesn't really affect me
- Net Frustration



Source: Retail Economics, DHL Supply Chain

Importantly, the data reveals two key insights:

- **Availability is the operational expression of trust:** it links price, quality, and experience in the shopper's mind.
- **Loyalty is built on consistency, not tolerance:** in a market defined by choice and tight margins, on-shelf reliability is a daily brand promise, not just an operational goal.



Shopper tolerance personas

Our research identified four distinct shopper personas using cluster analysis. Different characteristics capture tolerance levels to stockouts, household structure, mission type, and life stage. The analysis highlights how time pressures shape perceptions of reliability – and where commercial risk lies.

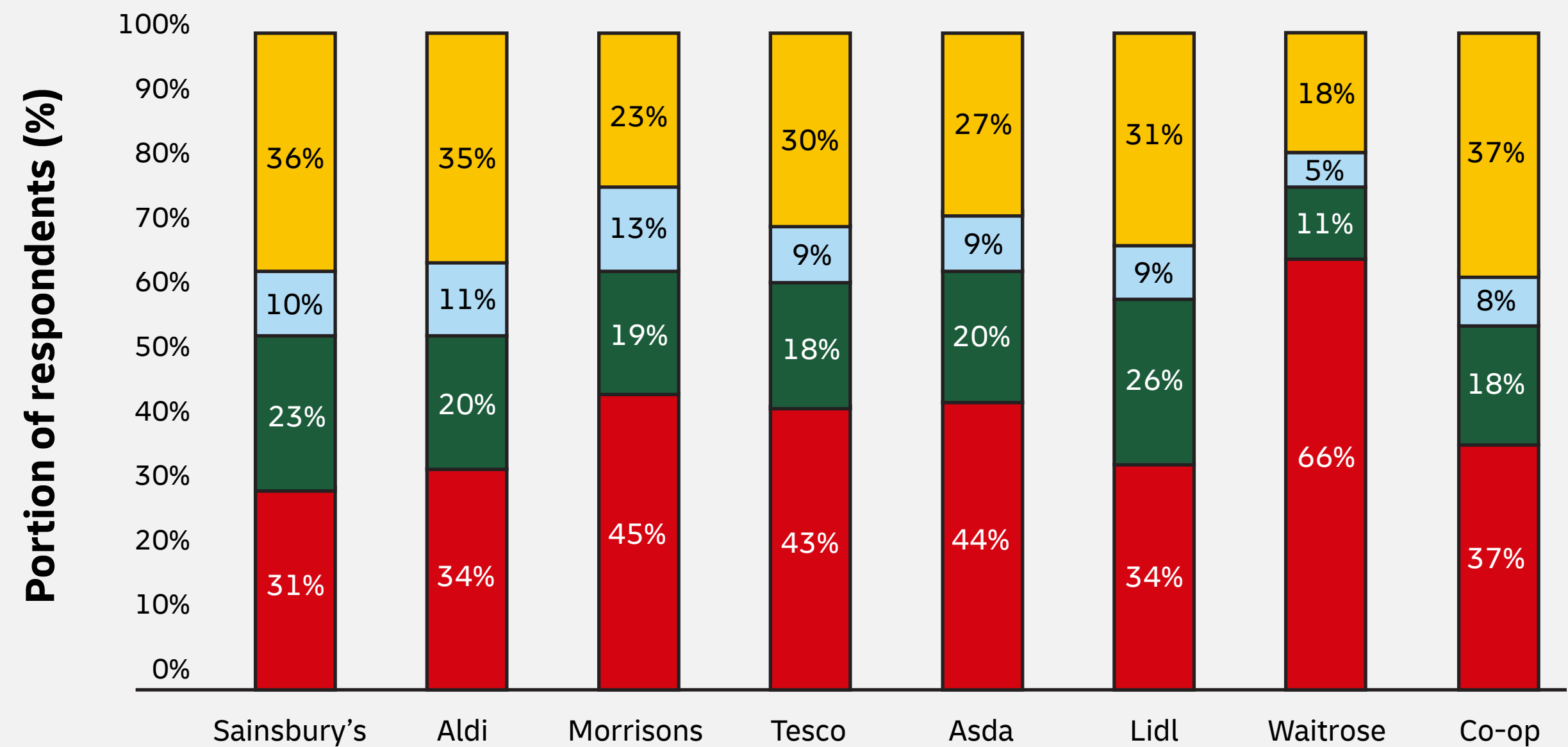
Where each persona shops

Retailer exposure varies sharply by shopper mix. Retailers with a higher share of low-tolerance shoppers face the greatest risk from availability issues.

For retailers, understanding where each persona over-indexes offers a roadmap to protecting share. In many ways, the challenge is about matching availability execution to the expectations of each customer type.



Which of the following supermarkets does your household shop at most often for groceries?



The Defectors

The Flexers

The Pragmatists

The Faithfuls

Source: Retail Economics, DHL Supply Chain



The Defectors

Low tolerance



Profile:

Time-pressed family shoppers who expect to complete their shop without compromise. When items are missing, frustration builds quickly and repeat gaps trigger switching.

Commercial signal:

Protect at all costs

High spenders with low tolerance: even minor gaps risk permanent switching and lost loyalty.

Household characteristics:

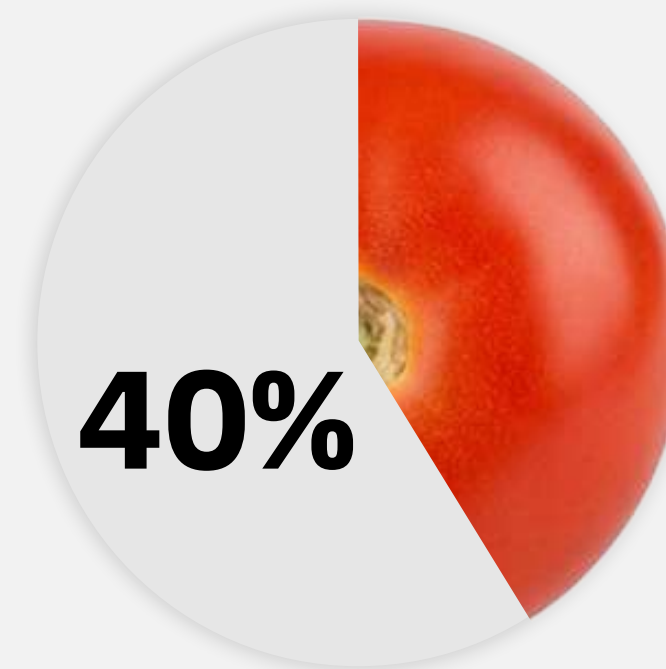
2.7 people

Families with children and dual incomes, large weekly baskets

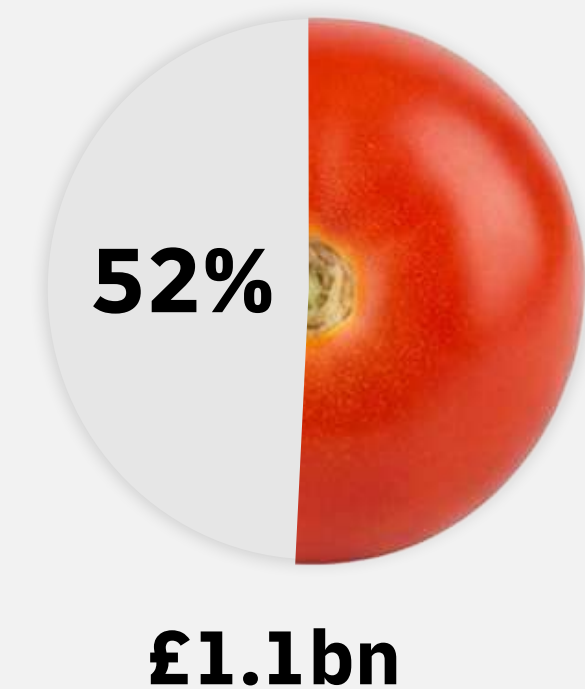
Weekly grocery spend:

£190

Proportion of shoppers:

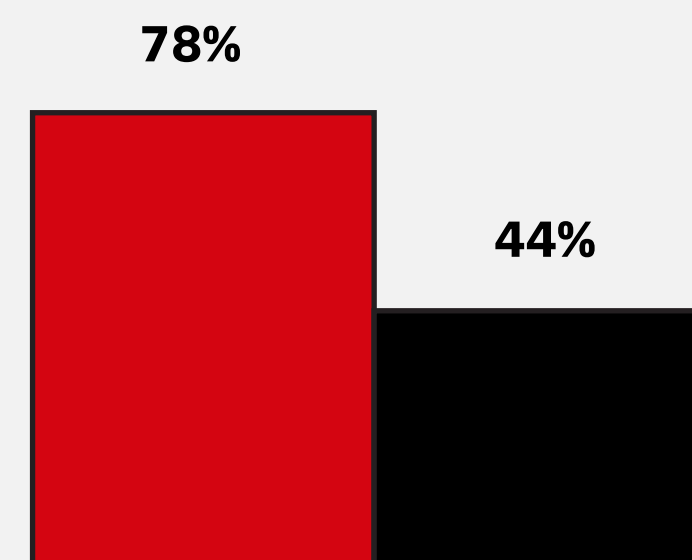


Proportion of total sales at risk from poor availability:

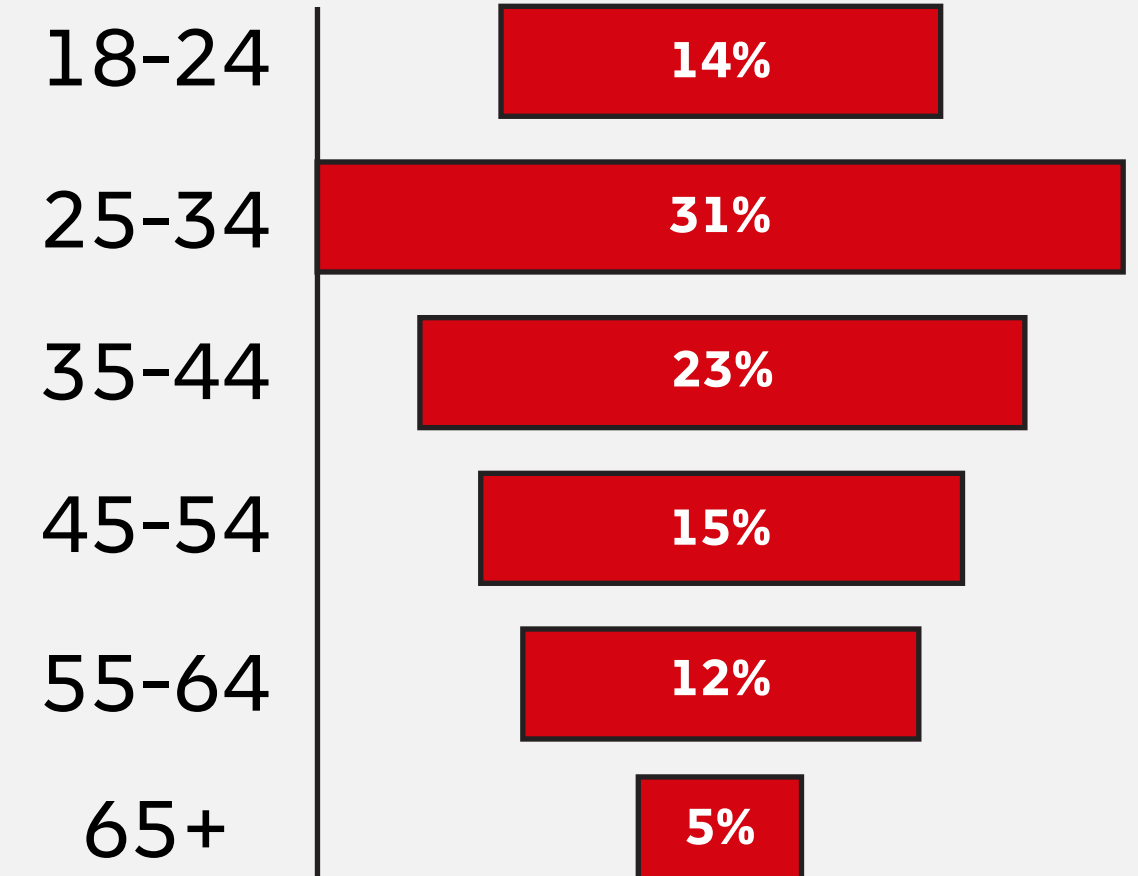


% switched stores in past year due to stock gaps:

Defectors UK Average



Age:





The Flexers

Mid-low tolerance



Profile:

Younger, agile shoppers who flex easily between retailers and channels. They are fairly brand-agnostic and adapt quickly when items are missing, substituting products or stores based on convenience or speed.

Commercial signal:

Win through flexibility

Dynamic missions mean transparent stock visibility and seamless substitutions are critical to retention.

Household characteristics:

1.9 people

Younger singles or couples, smaller urban households.

Weekly grocery spend:

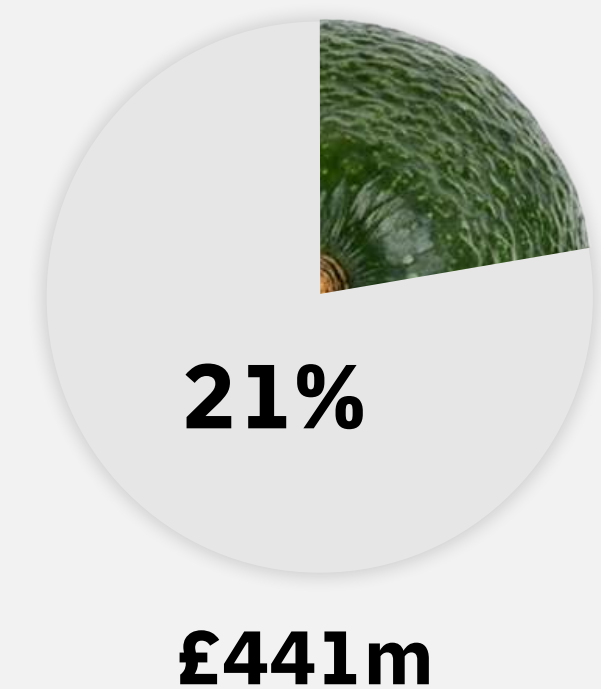
£111

Low-tolerance shoppers (the **Defectors** and **Flexers**) account for **six in ten** consumers, but drive **around three-quarters of all sales at risk** from stock gaps. Together they represent over **£1.5 billion of the £2.1 billion displaced spend caused by availability issues in UK grocery** each year. These groups are high-value and brand-fluid: when items aren't available, they move quickly and decisively.

Proportion of shoppers:

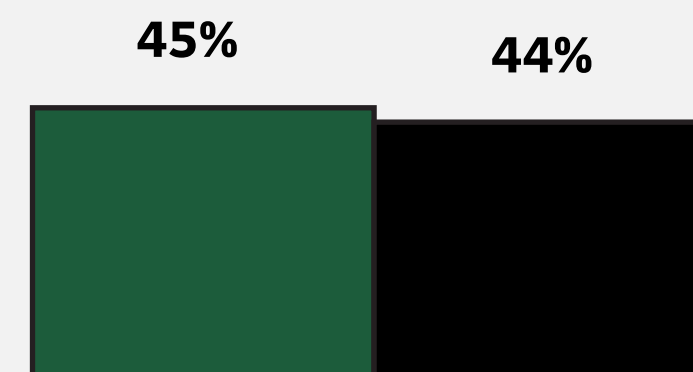


Proportion of total sales at risk from poor availability:

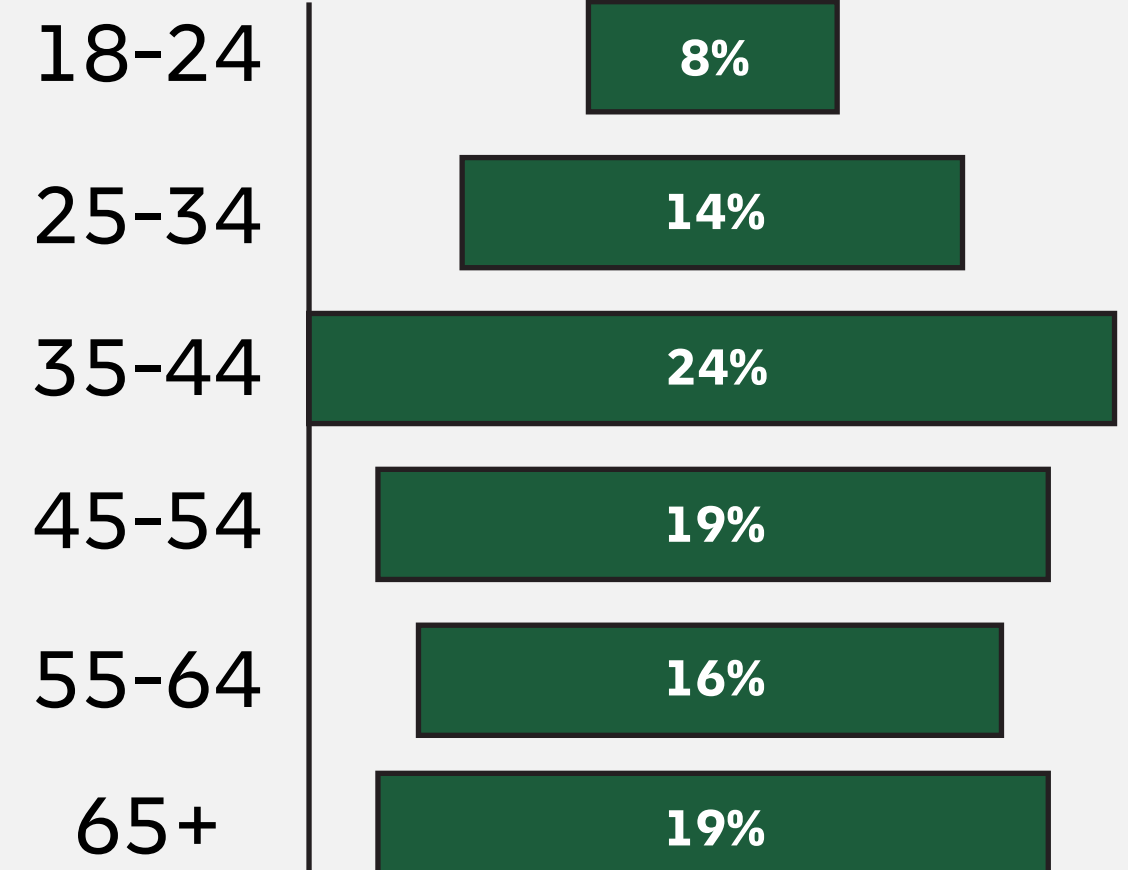


% switched stores in past year due to stock gaps:

Flexers UK Average



Age:





The Pragmatists

Mid-high tolerance



Profile:

Practical, value-conscious shoppers who accept the occasional gap if pricing and experience stay consistent. Frustration only builds when gaps persist.

Commercial signal:

Maintain reliability

Price and familiarity hold them, but repeat gaps risk long-term erosion of trust.

Household characteristics:

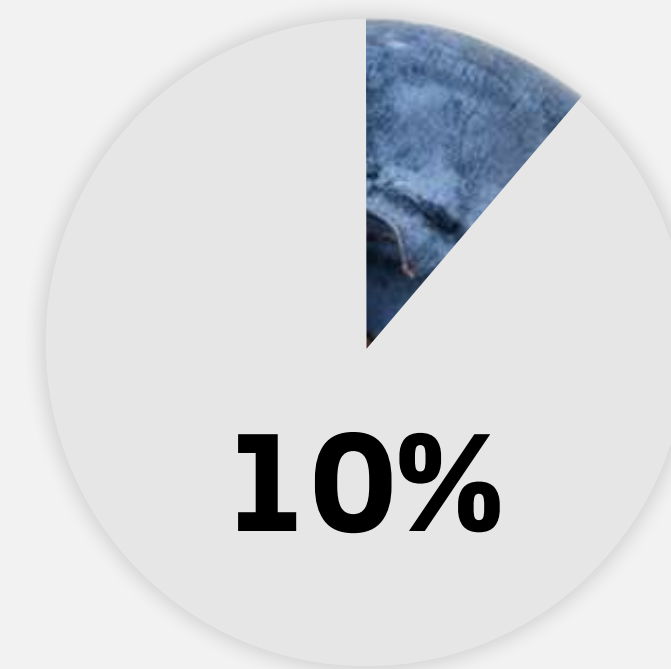
2.1 people

Settled couples or smaller families

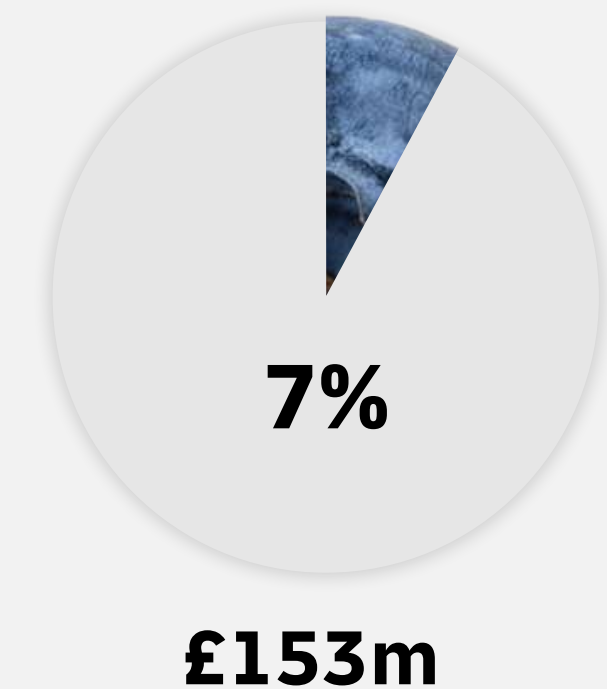
Weekly grocery spend:

£92

Proportion of shoppers:

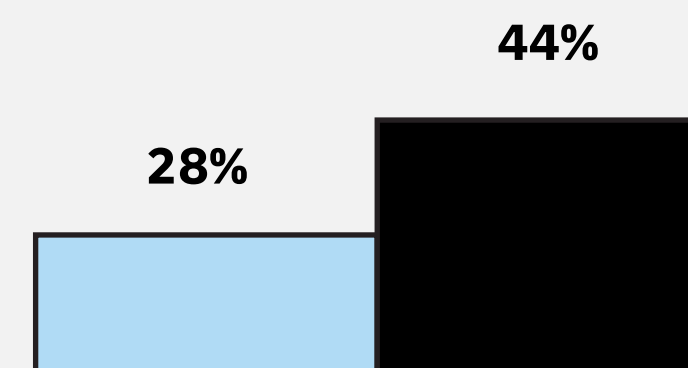


Proportion of total sales at risk from poor availability:

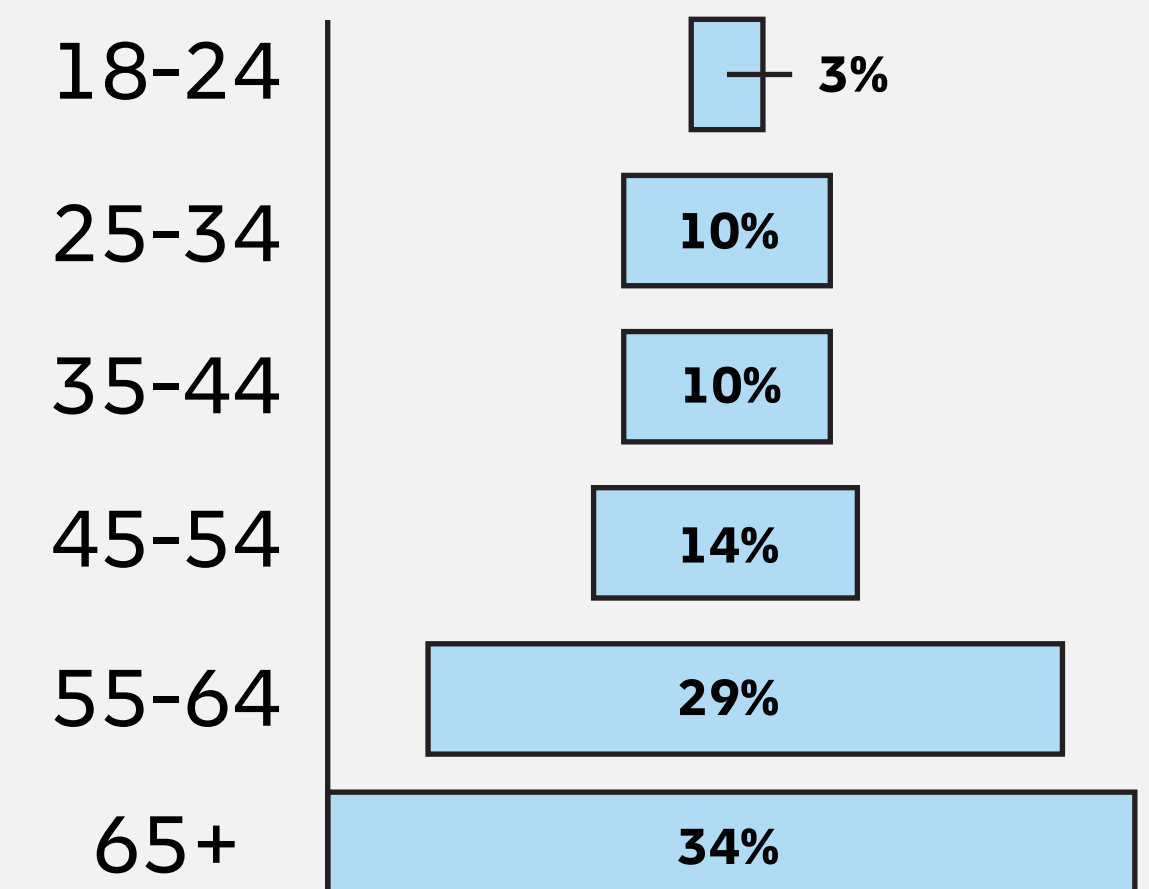


% switched stores in past year due to stock gaps:

■ Pragmatists ■ UK Average



Age:





The Faithfuls

High tolerance



Profile:

Older, routine-led shoppers who value familiarity and trust. They stick to their preferred supermarket and accept minor gaps, adjusting their basket rather than switching stores.

Commercial signal:

Sustain loyalty

Dependable but spend less: consistency sustains goodwill.

Household characteristics:

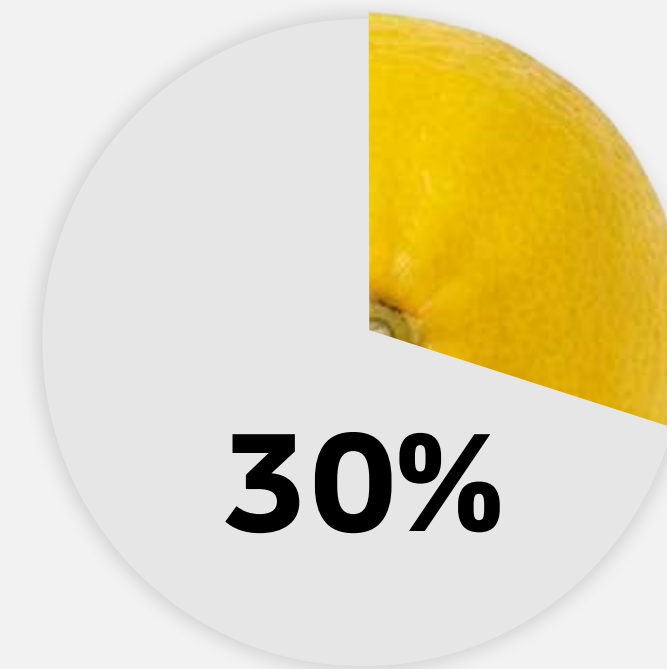
1.7 people

Older couples or single-person households, frequent small-basket trips.

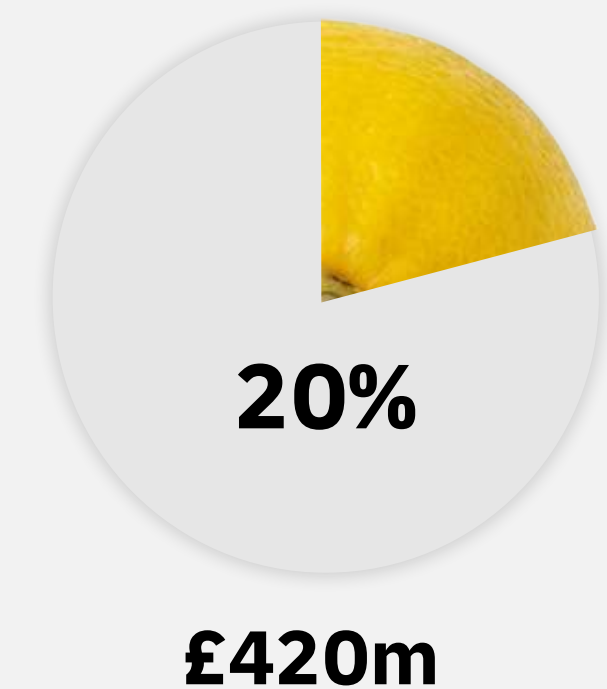
Weekly grocery spend:

£88

Proportion of shoppers:

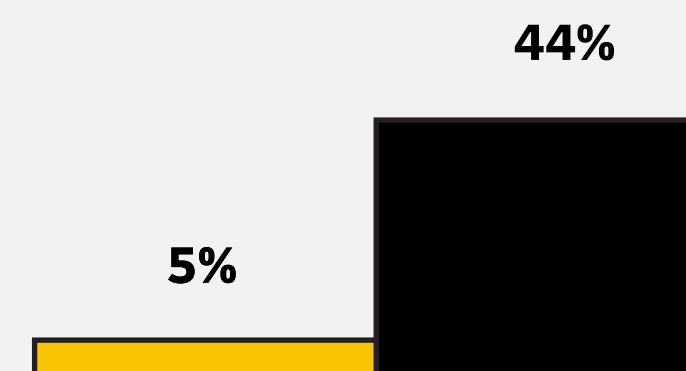


Proportion of total sales at risk from poor availability:

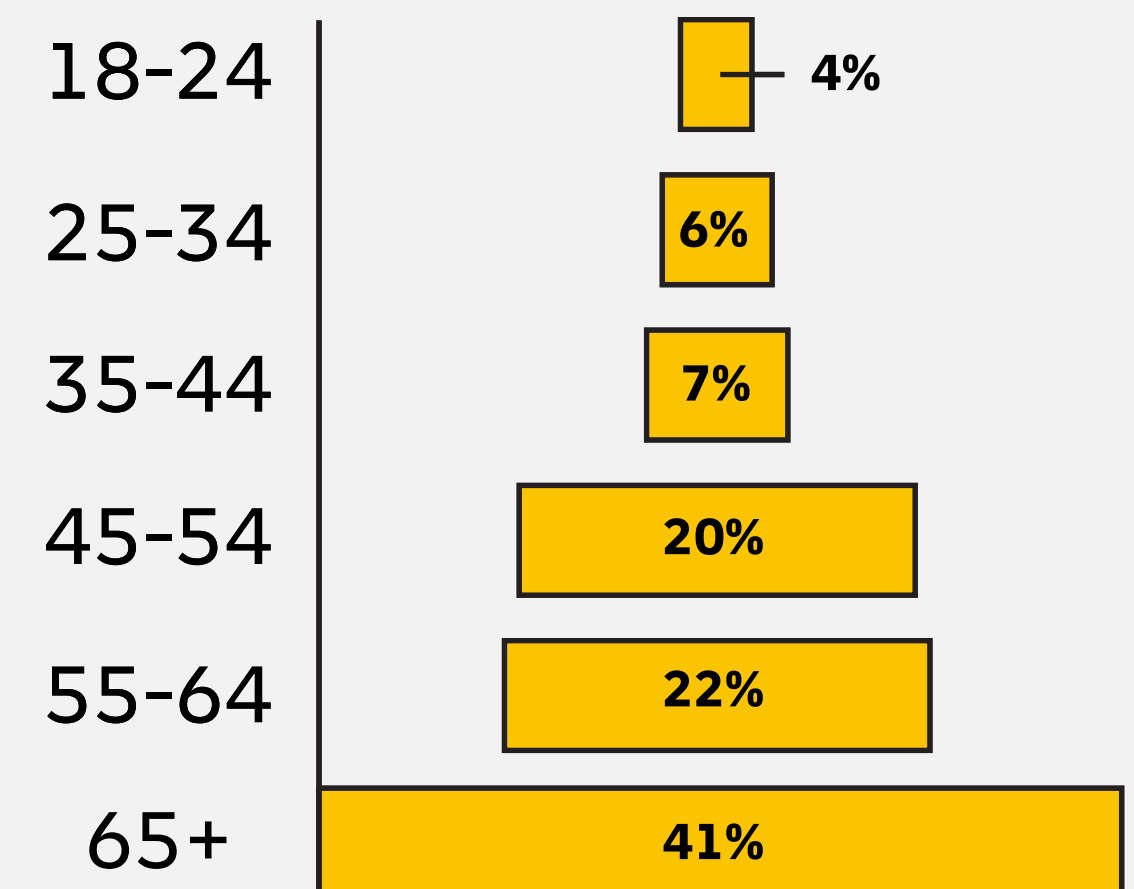


% switched stores in past year due to stock gaps:

Faithfuls UK Average



Age:





Mission and product sensitivity: why some gaps matter more than others

Not all 'gaps' are equal. Shopper tolerance for missing items varies sharply depending on the type of trip and the products involved. For example, a stockout during a top-up shop could just be a mild inconvenience, but might be a deal-breaker when shoppers are meal planning for entertaining.

Our research confirms that 'meal-for-tonight' and 'special-occasion' shops are the most sensitive missions, with around **three in five shoppers saying a missing item would disrupt their shop** and often lead to a secondary trip. Top-up or non-food missions, by contrast, carry much higher tolerance. Here, shoppers can delay, substitute, or shop elsewhere later with minimal disruption.

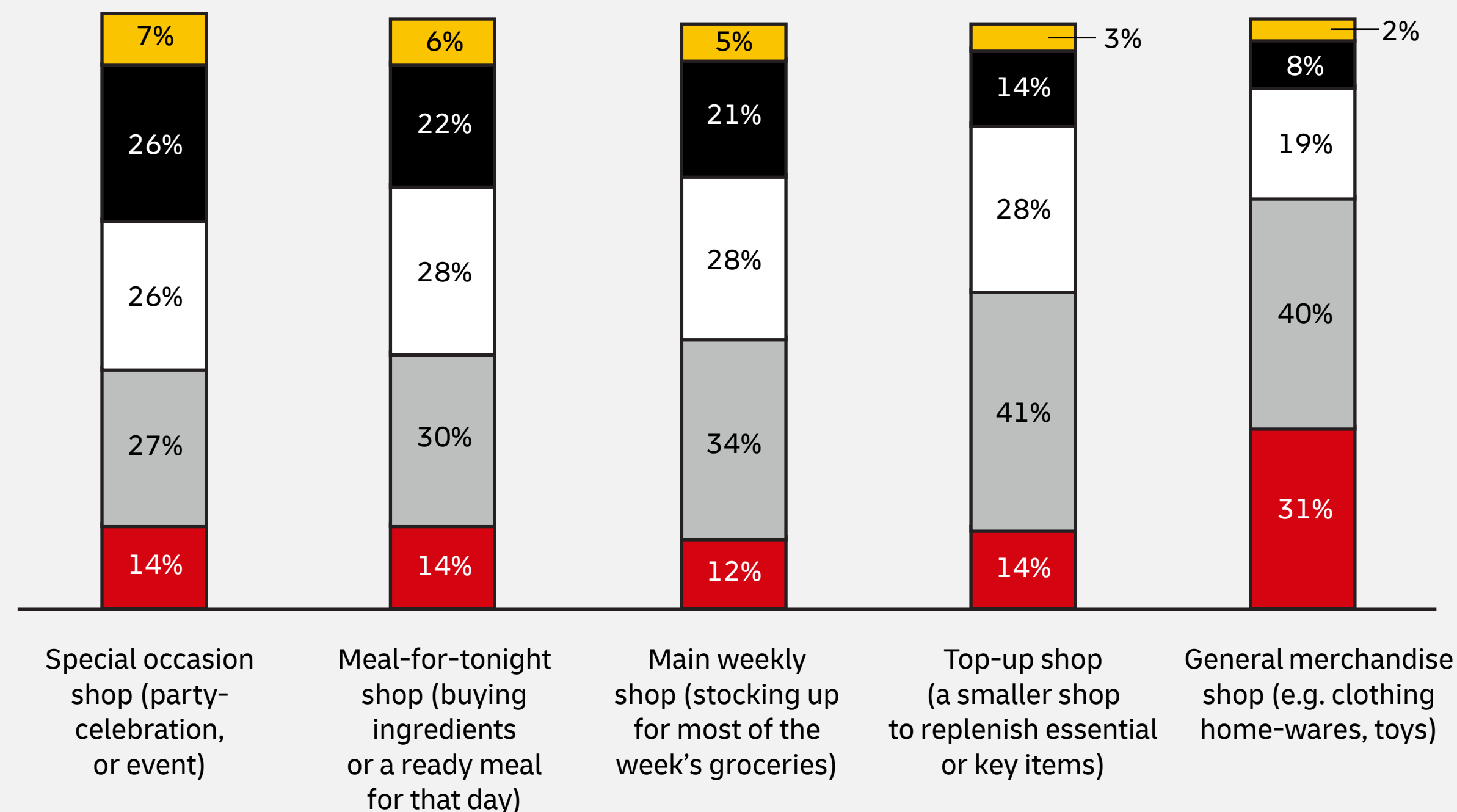
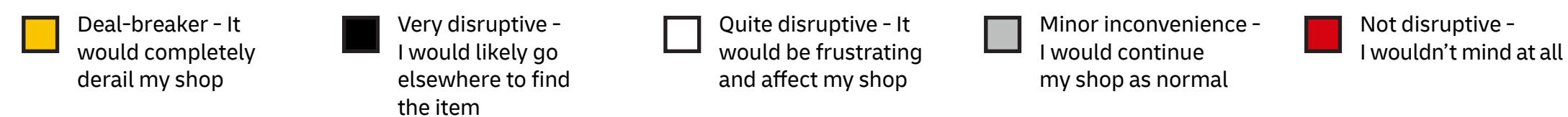


Three in five shoppers say a missing item would disrupt their shop

Mission matters: why some gaps hit harder than others

For retailers, this underscores that context shapes consequence. Operational excellence during 'mission-critical' shops (especially in evenings and weekends) delivers disproportionate gains in satisfaction and loyalty. Small lapses in these moments carry far greater weight than gaps elsewhere.

If an item you are looking for is not available (and there is no suitable alternative), how disruptive would that be depending on the type of trip?



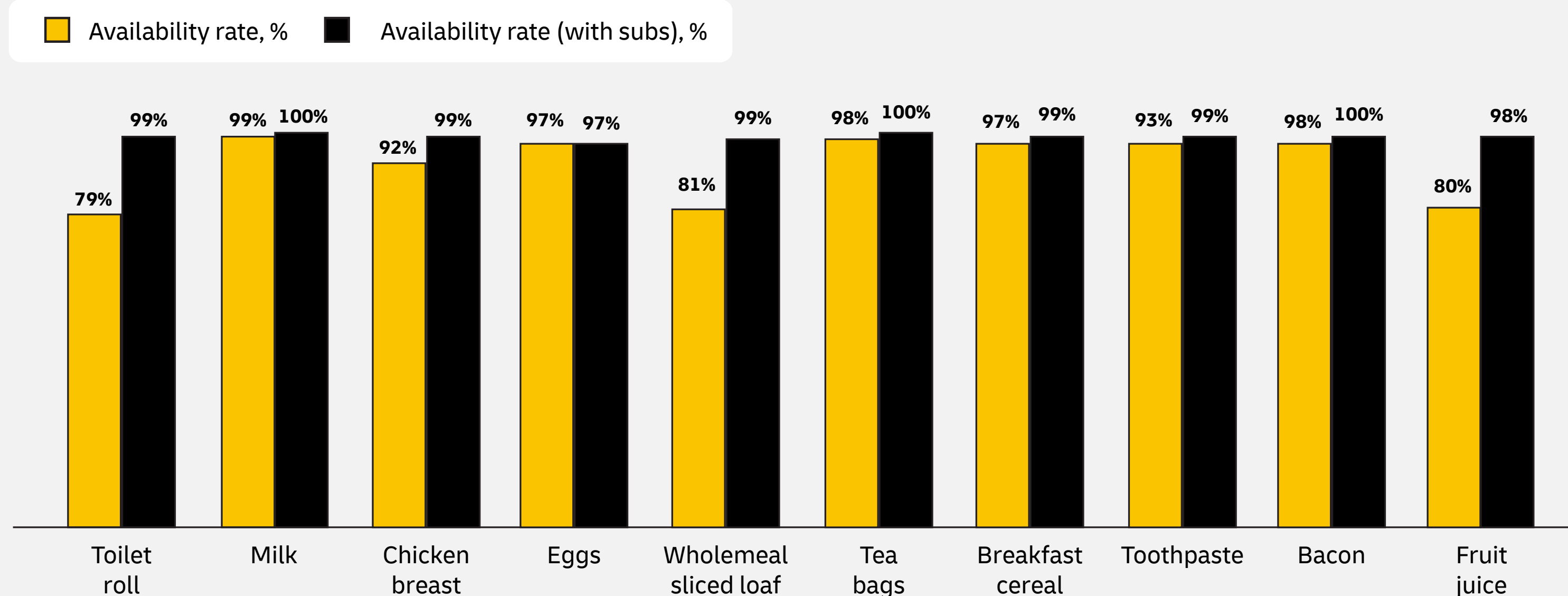


Strong availability for everyday essentials that matter most, but even one gap can cause disproportionate frustration

The items that cause the most frustration if unavailable are everyday essentials that anchor household routines like toilet roll, milk and bread. Shoppers expect to find these always available, and when they're not, the reaction is immediate and emotional.

Audit data shows on-shelf availability across these top 10 items averaged 92%, rising to near-perfect levels once acceptable substitutes are included. Yet when a preferred brand or SKU is missing (especially in visible, high-frequency categories), shoppers still perceive it as a failure, even when an alternative is available.

Top 10 items shoppers say cause most frustration if unavailable and their availability rates



Key insight:

The gap between operational success and perceived reliability highlights that **availability is defined by the shopper's experiences, not just what the data shows**. The quality of substitution, range depth, and the emotional reassurance of seeing shelves full, all play a role in maintaining trust.

Source: Retail Economics, DHL Supply Chain



The multi-store mindset: loyalty redefined

Loyalty in grocery hasn't disappeared – it's evolved into something more dynamic.

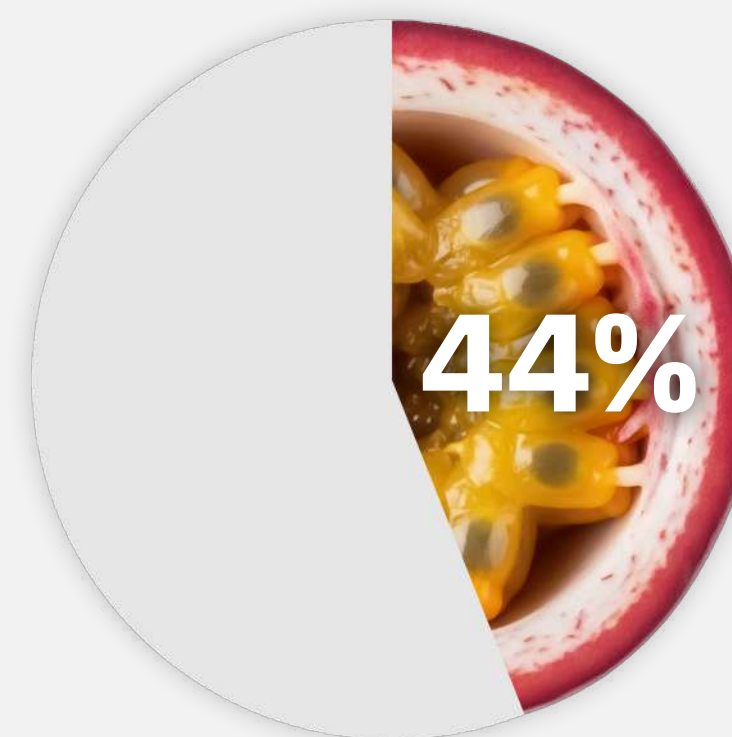
Many households still have a preferred supermarket for their main weekly shop, but they now distribute their spend across multiple formats, missions, and channels. The average UK household now shops for groceries almost five times a week, visiting around eight different stores over a typical 12-week period¹.

It reflects a more agile mindset, where customers flex between full-line supermarkets, discounters and convenience stores based on immediate needs and perceived reliability. But that flexibility cuts both ways. When availability falls short, it's easier than ever for spend to flow elsewhere – sometimes permanently.

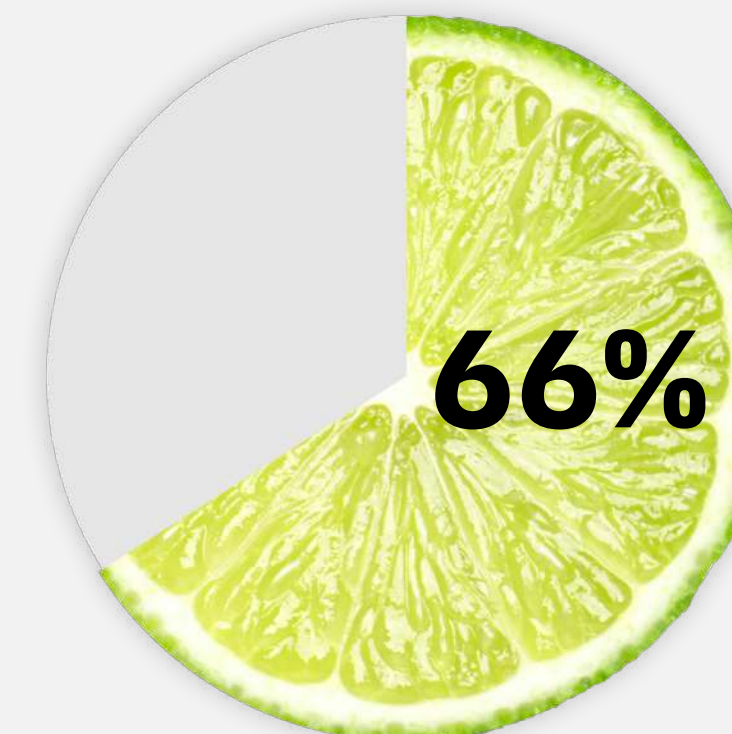
Our data shows that **44% of consumers have switched or added another supermarket in the past year due to availability issues**, rising to almost two-thirds among under-45s. This group is less likely to have a single 'main' store and more likely to spread their spend across several.

For most shoppers, these aren't permanent defections but temporary shifts in where and how they shop. Yet the effect is the same: spend is redistributed, loyalty fragments, and once habits change, they're hard to win back.

1. NIQ Homescan, 2024



44% of consumers have switched or added another supermarket in the past year due to availability issues

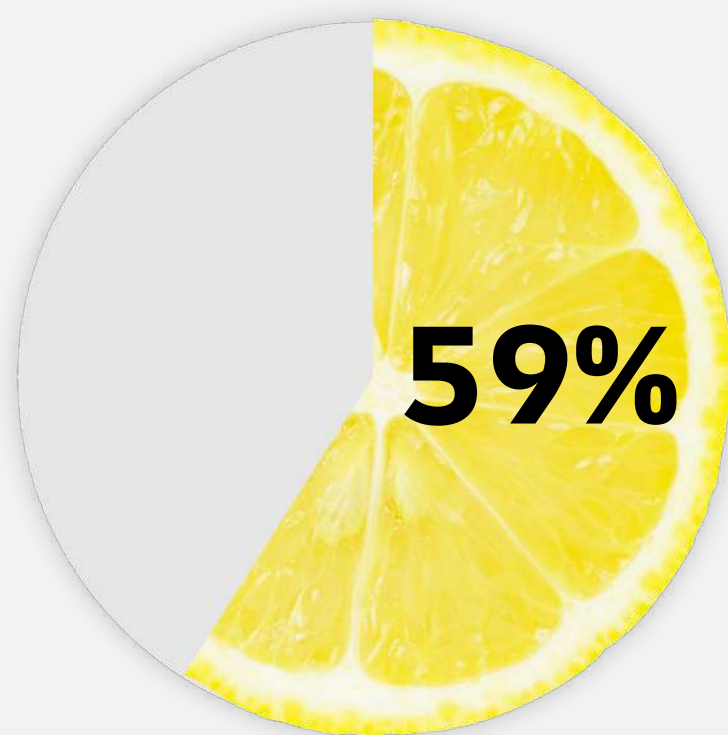


Rising to almost two-thirds among under-45s





Shopping across multiple stores has become the norm... and stock gaps accelerate it

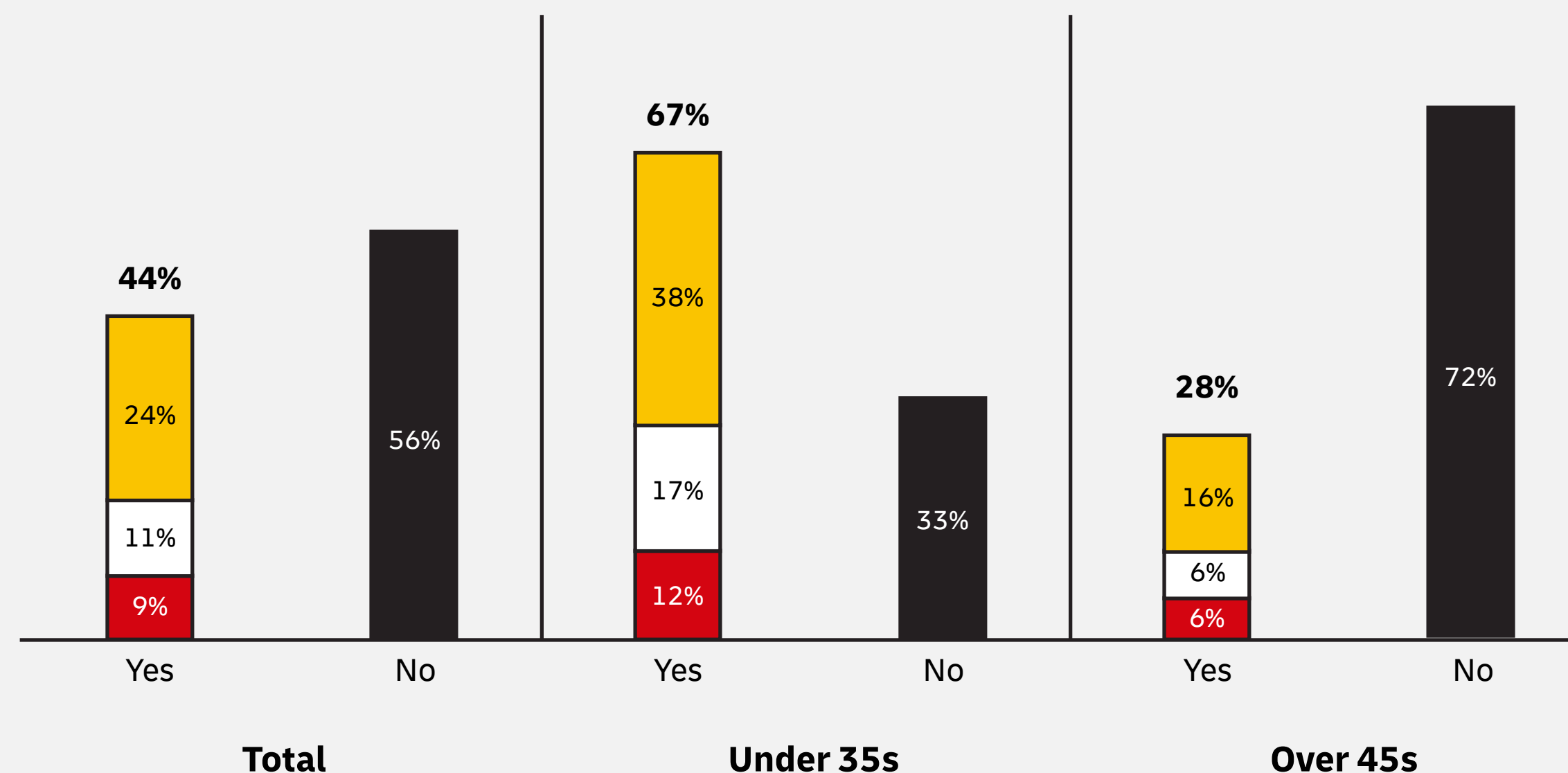


Nearly six in ten say product availability is why they shop multiple stores

Nearly six in ten (59%) say product availability is a key reason they shop across multiple supermarkets – a reminder that reliability drives repeat missions just as much as price or promotions. For retailers, operational consistency protects share of spend. In a market where loyalty is fluid and switching is effortless, availability has become the quiet currency of trust – the factor that turns reliability into retention.

In the past 12 months, have you changed the main place you shop for groceries because items you wanted were frequently unavailable?

- Yes - I started shopping at another supermarket as well as my usual one
- Yes - I switched temporarily but then went back
- Yes - I switched to a different supermarket permanently
- No - I have not changed supermarkets due to availability





Availability in convenience: small formats, high stakes

The leading grocers are expanding convenience and forecourt estates at pace, reflecting how shopping habits continue to shift towards smaller, more frequent trips.

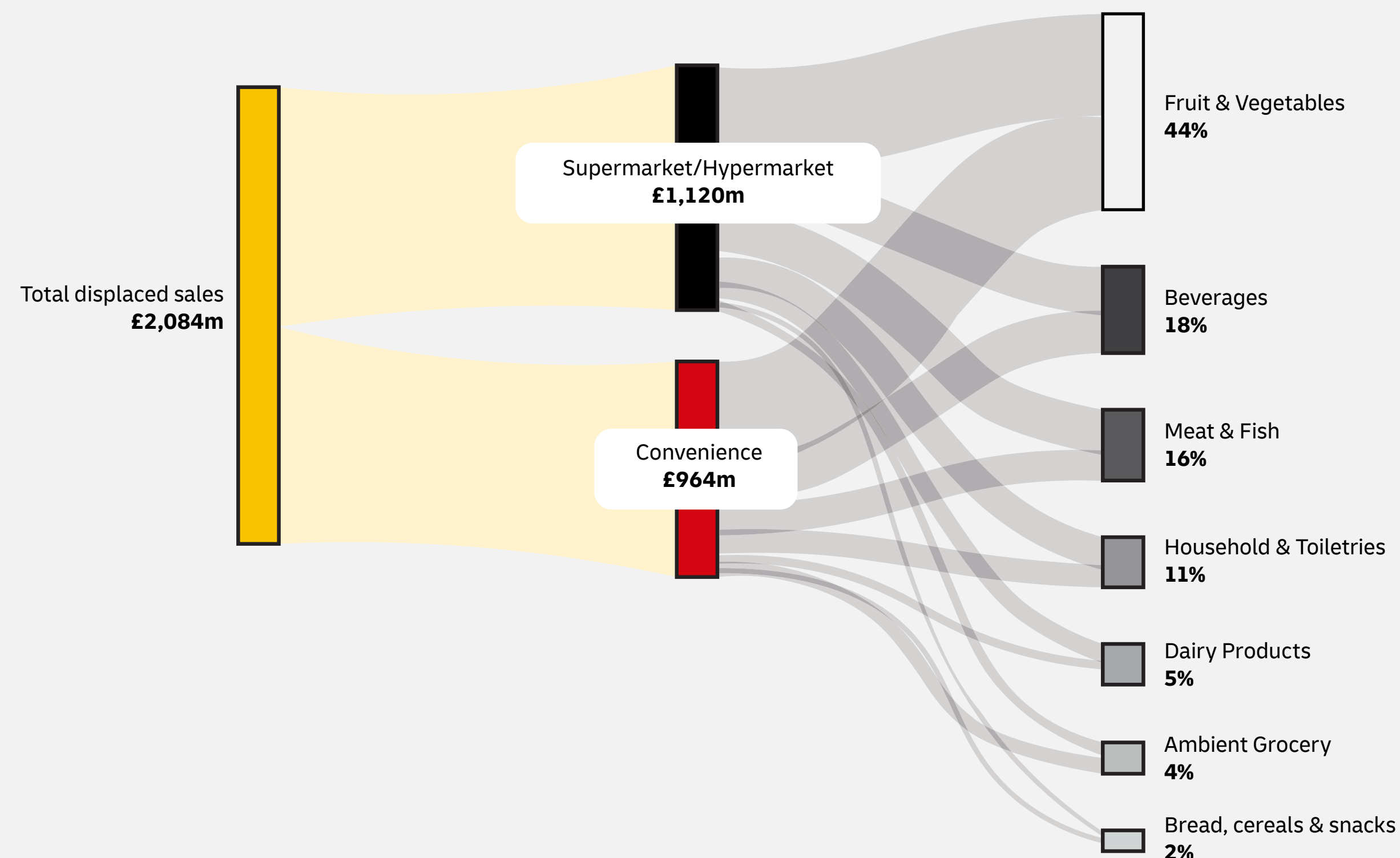
Hybrid working, smaller households and busier lifestyles have made convenience stores a fast-growing segment - the go-to format for top-ups, forgotten essentials, on-the-go and meal-for-tonight missions. However, as this format grows in prominence, the challenge of maintaining full shelves has intensified. **Convenience stores represent around one-fifth of grocery sales yet account for almost half of all displaced spend.**

Our audit found availability rates for convenience stores typically sit in the low-to-mid-80% range, compared with supermarkets and hypermarkets operating well into the 90s. Closing that gap would deliver a meaningful commercial uplift.

Consumers are aware of this difference: **two in three (63%) say stock availability is lower in convenience stores** than in larger supermarkets. This tension reflects both operational and demand-side realities.

The combination of rising shopper expectations and compact operational models explains why convenience formats have lower availability rates. But it also highlights the opportunity: these high-velocity, high-visibility stores are where marginal improvements in on-shelf performance can deliver outsized returns.

Convenience formats carry a disproportionate share of sales at risk from stock gaps





Distinct pressures driving stock gaps in smaller-format stores

Demand-side factors	Operational factors
Short, purposeful trips: Shoppers spend only a few minutes in-store and don't have time to look for alternatives.	Limited space: Smaller stockrooms restrict storage and reduce buffer capacity.
Immediate needs: Trips are often mission-based (e.g. 'meal for tonight'), so missing items can derail the shop.	Smaller ranges: Fewer SKUs and substitutes heighten the visibility of any gaps.
High expectations: Many shoppers expect the same reliability as larger supermarkets despite smaller formats.	Rapid turnover: High delivery frequency and fast stock rotation increase exposure to short-term disruption.
Low tolerance: Little time or willingness to search for alternatives. Missing items are often skipped or bought elsewhere.	Multi-use operations: Many stores now double as local hubs for click-and-collect or rapid delivery, stretching capacity further.
	Tight staffing: Lean teams mean even minor delivery delays or replenishment issues can quickly translate to empty shelves.

The combination of rising shopper expectations and compact operational models explains why convenience formats have lower availability rates. But it also highlights the opportunity: these high-velocity, high-visibility stores are where marginal improvements in on-shelf performance can deliver outsized returns.





Section three: Turning availability into an advantage – strategic focus points for retailers

Availability has always defined grocery excellence, but the challenge has evolved.

Today's customers shop across multiple channels and missions, expect instant access to products, and have little tolerance for disruption. Combined with tighter margins and greater demand volatility, this complexity is testing even the most advanced supply chains. The next phase of competitiveness will come from using technology, data, and collaboration to make availability predictable, flexible, and seamlessly executed end-to-end.

To stay ahead, grocers must evolve availability from a store-level metric into a connected, predictive, and resilient system.



Our research highlights five focus points:

1. Predict and prevent with AI-driven foresight

Maintaining availability now means seeing disruption before it happens. Leading grocers are combining store, supplier, and logistics data to anticipate stock gaps and local demand shifts in real time. DHL Supply Chain's AI-enabled control towers bring this data together using predictive analytics to forecast short-term surges, re-route inventory, and trigger proactive interventions. The result: fewer gaps, lower waste, and a more stable supply chain.

2. Strengthen supplier partnerships for end-to-end visibility

Availability starts upstream. Closer collaboration with suppliers (e.g. sharing forecasts, stock data, and transport planning) creates a single version of truth and reduces volatility. DHL Supply Chain's supplier-to-shelf visibility and collaborative planning tools integrate production, warehousing, and transport into one transparent network, helping partners react faster and maintain continuity when disruption strikes.

3. Raise the bar for convenience availability

Convenience formats remain central to growth, but they carry greater operational complexity. Smaller footprints, limited back-room space, and rapid turnover make shelf availability harder to maintain. DHL Supply Chain helps retailers optimise small-format efficiency through high-frequency deliveries, store-ready packaging, and smart inventory management, ensuring top-up missions are as reliable as the weekly shop.

4. Build resilience for the unforeseen

From equipment breakdowns to local staffing shortages, disruption often happens where it's least expected. Building resilience means designing flexible networks that adapt instantly. DHL Supply Chain's multi-temperature infrastructure, national transport coverage, and workforce planning solutions enable rapid re-routing and redeployment - keeping shelves stocked even when conditions change.

5. Make reliability part of the brand promise

Shoppers equate stocked shelves with dependability. Treating availability as part of the brand experience means embedding reliability across planning, logistics, and store execution. DHL Supply Chain's integrated fulfilment and logistics solutions turn that promise into practice, ensuring consistency that builds confidence, repeat custom, and market share.

Availability has always mattered, but in a market defined by choice, it's now the clearest signal of trust. Grocers that combine predictive intelligence with operational precision will keep shelves full and build the resilient, data-driven supply chains that define the future of grocery retail.

Conclusion

Product availability has become the defining pressure point in UK grocery. In one of the world's most competitive retail markets, even small gaps can have big consequences. One in five shopping trips now involve at least one missing item, costing around £2.1 billion in displaced sales each year and eroding shopper confidence in reliability.

Today's consumers are more mobile, informed and selective. They shop across multiple retailers and channels, and when shelf gaps appear, it often impacts loyalty with low tolerance levels and frustration. Availability has become a subtle but decisive factor in where and how people choose to shop. It's become a currency of trust that underpins loyalty in an era of effortless comparison and low switching costs.

For retailers, this presents both challenge and opportunity. High expectations, rising complexity and growing pressure on convenience formats mean that small operational variances now carry disproportionate commercial weight. Yet those same dynamics make the rewards for getting availability right even greater. Consistency across missions and formats not only protects sales, but reinforces the brand promise that keeps shoppers coming back.

The next wave of competitiveness will be defined by foresight and precision - by retailers and partners able to predict disruption, integrate data and execute flawlessly. In summary, availability has become the frontline proof of reliability, trust and performance for next generation grocery.

Methodology

This study uses a triangulated approach combining in-store audits, consumer research, and economic modelling.

Store audits were conducted by Retail Economics in Q4 2025 across six major grocers, covering 102 stores nationwide. Each represented a mix of convenience stores, supermarkets, and hypermarkets, weighted by total sample to reflect the UK market. Products were recorded as available if the exact SKU was present; close equivalents were logged as substitutes in line with standard grocery auditing practice.

A nationally representative survey of 2,000 UK grocery shoppers explored how consumers react to stock gaps and the impact on perceptions of reliability.

Findings were combined with ONS spending data, population estimates, and Retail Economics' proprietary datasets to model the total value of grocery sales affected by stock gaps – displaced spending that may be redirected or lost as a result of an out-of-stock item.

For more information on methodology, contact Retail Economics.



About DHL Supply Chain

DHL Supply Chain is the retail sector's trusted logistics partner, providing end-to-end warehousing, fulfilment, distribution and omnichannel solutions for many of the UK's most recognisable retailers, grocers and consumer brands. Powered by advanced automation, data-driven optimisation and a commitment to sustainable operations, DHL helps retailers innovate faster, improve availability, reduce cost and deliver exceptional customer experiences with speed and reliability - all with the agility and resilience that modern retail demands.

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About Retail Economics

Retail Economics is an independent economics research consultancy focused on the consumer and retail industry.

Retail Economics analyse the complex economic landscape and draw out actionable insight for their clients. Leveraging Retail Economic's own proprietary retail data and applying rigorous economic analysis, to transform information into points of action.

Learn more at www.retaileconomics.co.uk

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