

GCA Annual Survey 2025

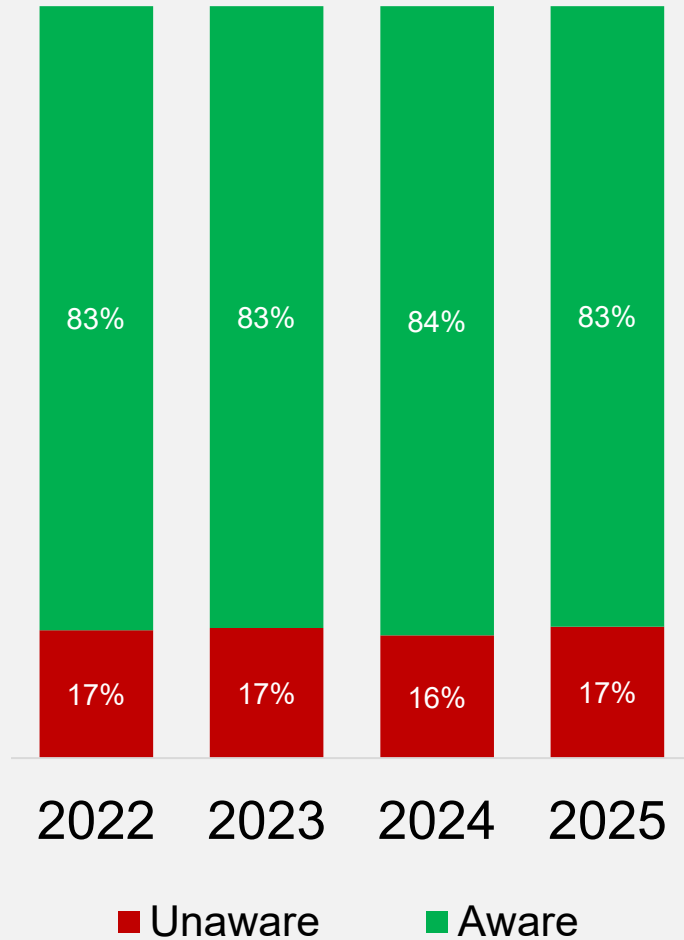


Groceries Code
Adjudicator

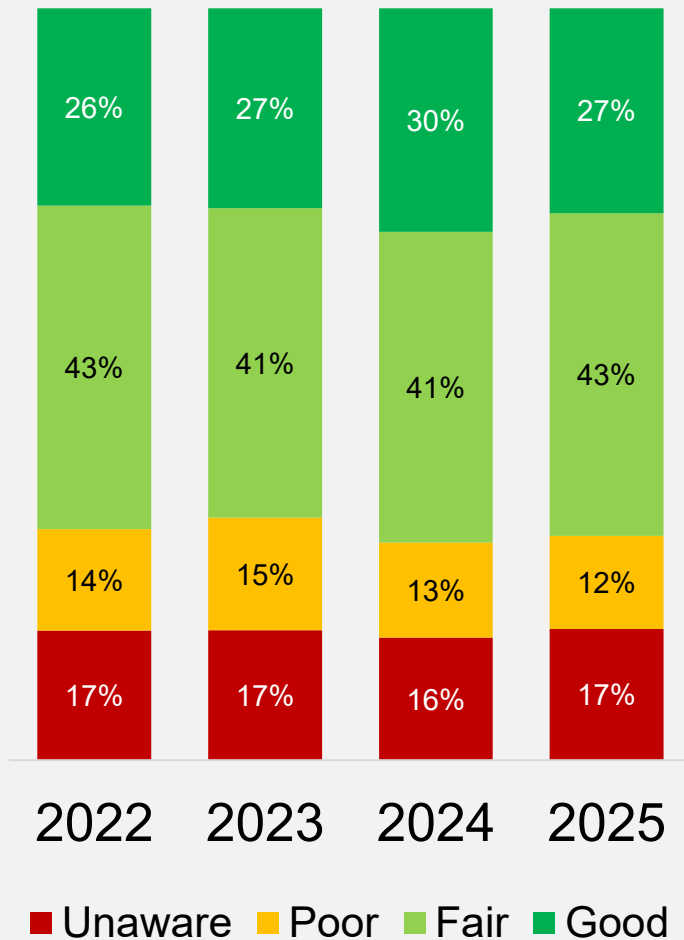
YouGov[®]

Understanding of the GCA's role

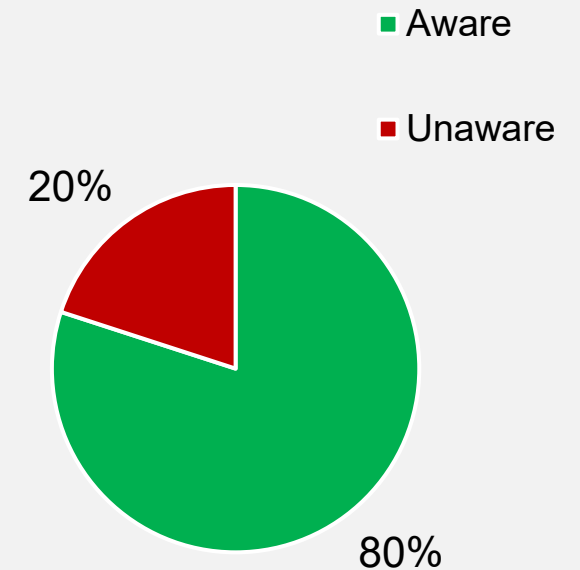
GCA awareness



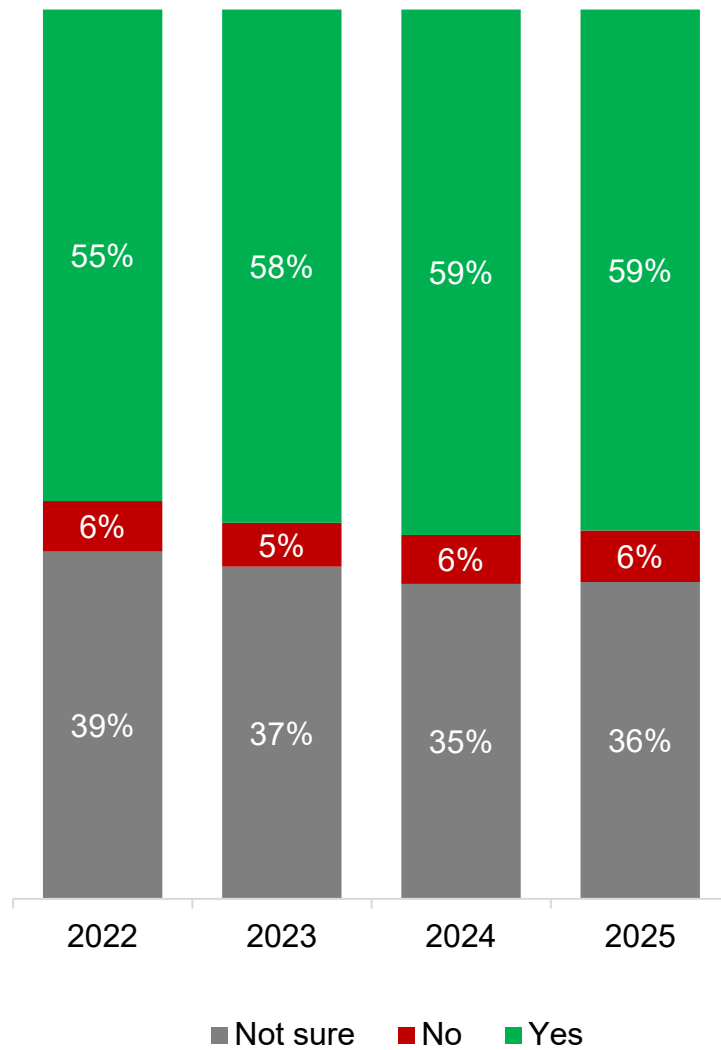
Understanding of the GCA's role



Aware that GCA operates confidentially?

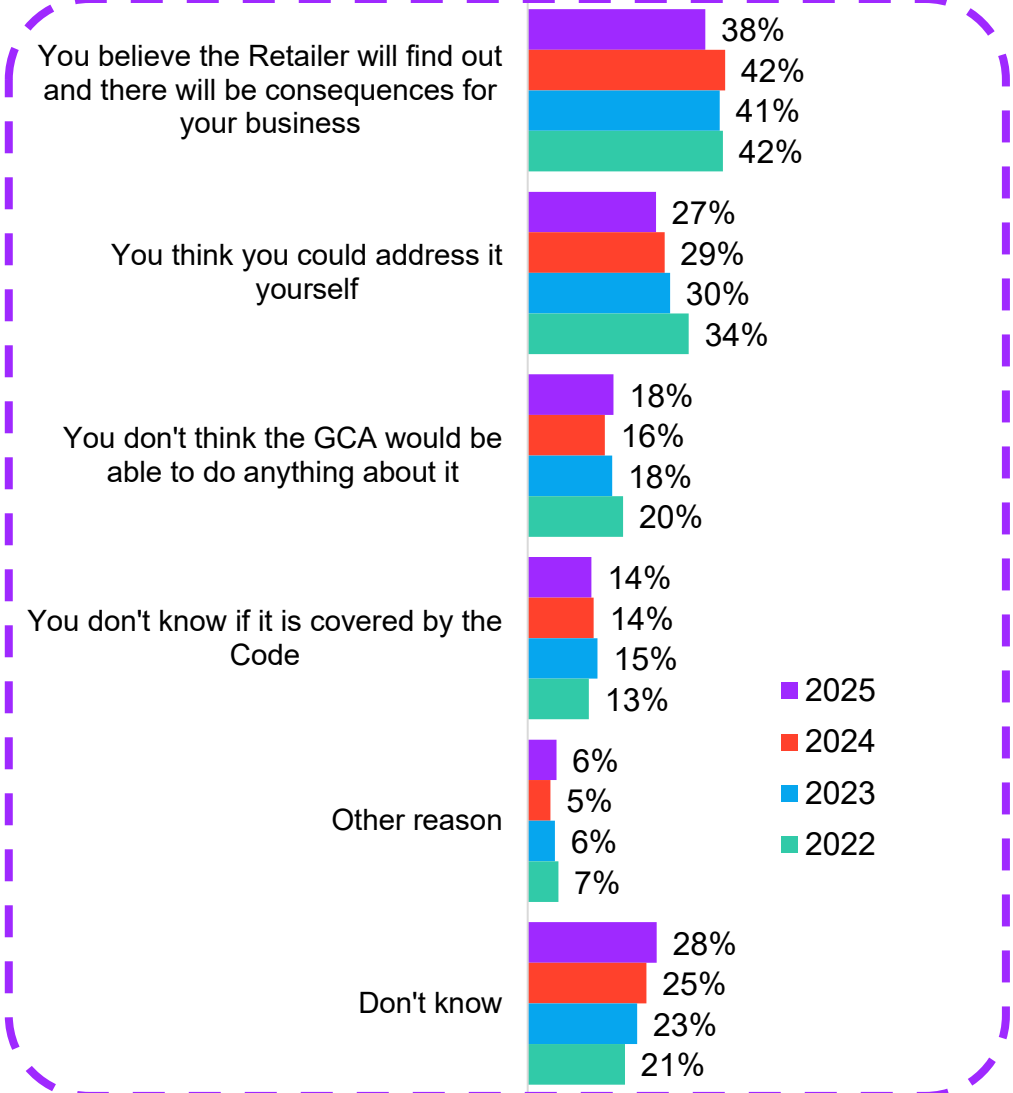


Would you raise an issue with GCA?

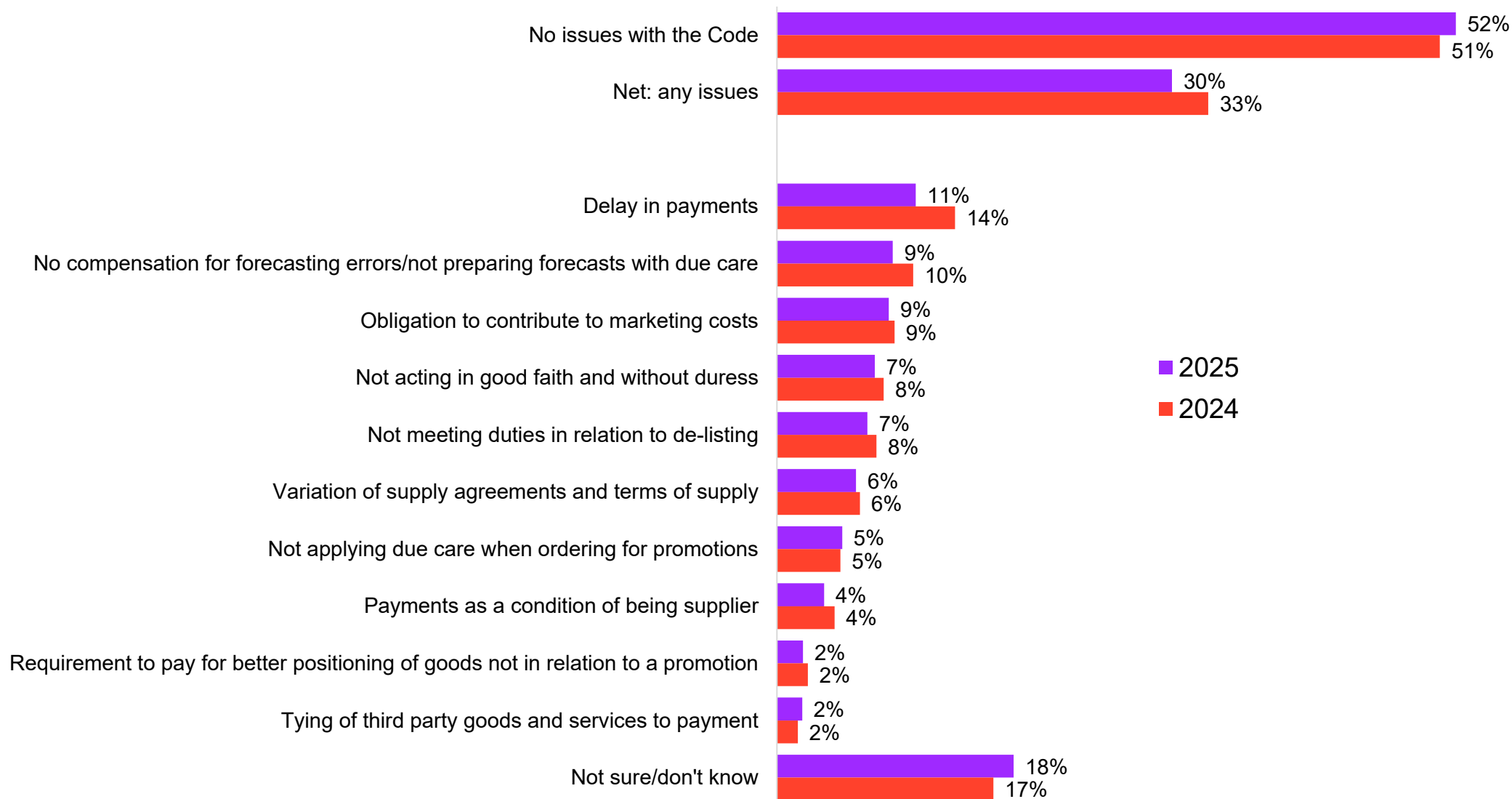


Among this group of no and don't know

Why might not raise with the GCA



Issues experienced (in Code terms)

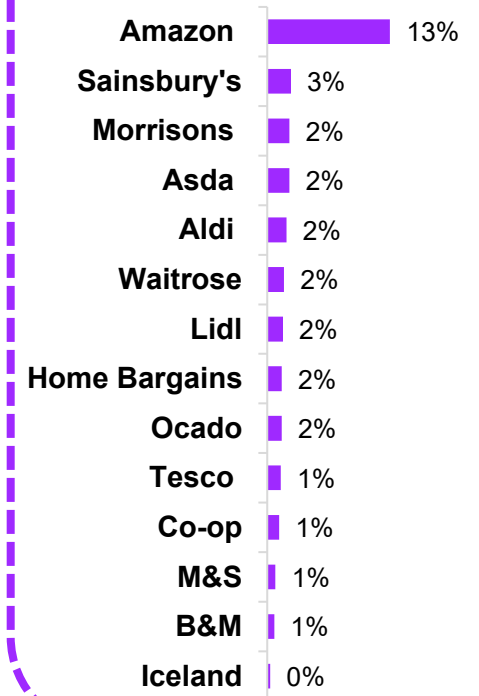


Issues experienced (in supplier terms)



10% have raised an issue with a retailer in the last year

About which Retailer?
(as a % of their suppliers)



Issues experienced (in supplier terms)

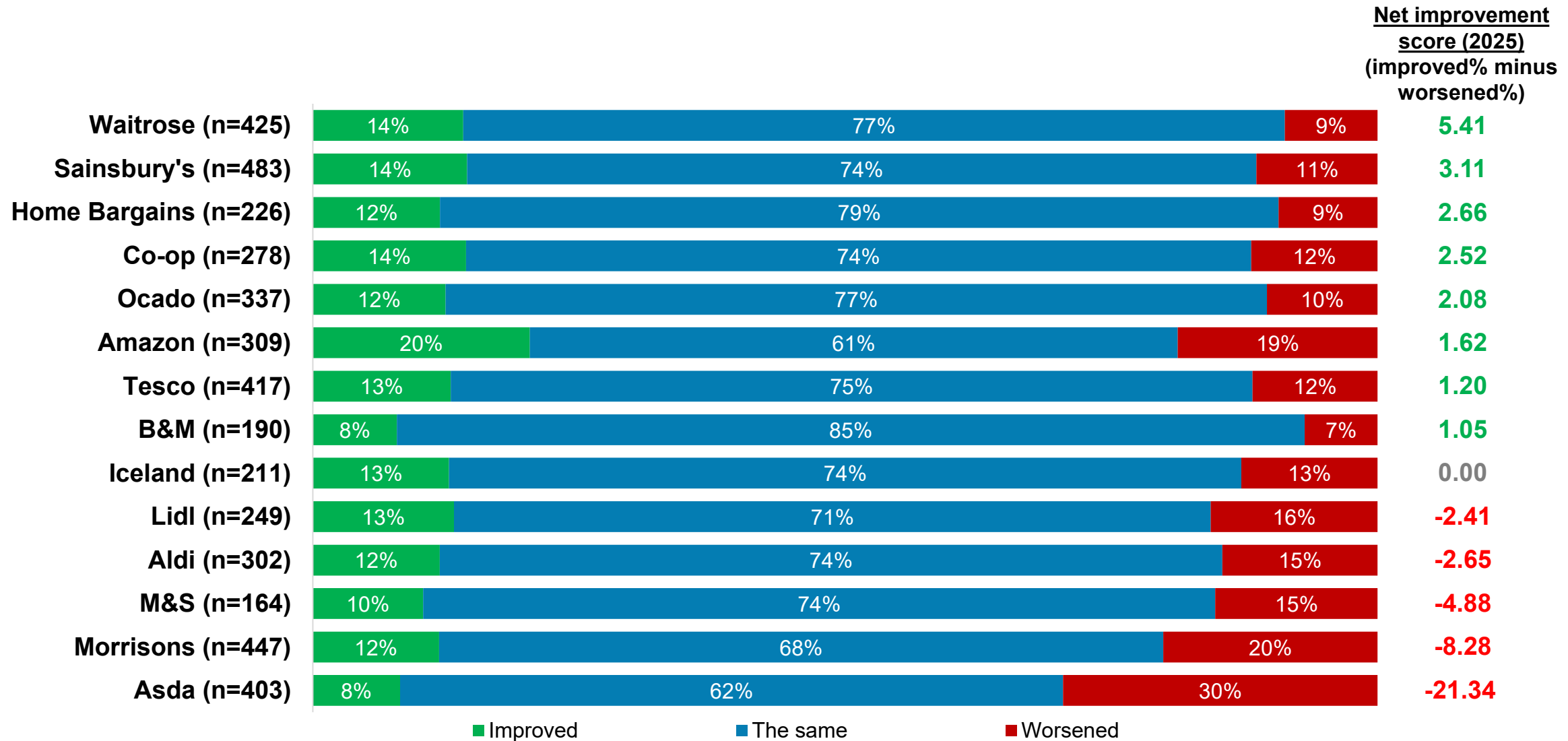
	Retailer 1	Retailer 2	Retailer 3	Retailer 4	Retailer 5	Retailer 6	Retailer 7	Retailer 8	Retailer 9	Retailer 10	Retailer 11	Retailer 12	Retailer 13	Retailer 14
Inadequate processes and procedures in place to enable invoice discrepancies to be resolved promptly	1%	2%	14%	7%	2%	6%	0%	3%	3%	2%	5%	0%	3%	4%
Incurring significant costs because of inaccurate forecasting by Retailers	2%	2%	6%	6%	5%	6%	5%	3%	5%	3%	5%	2%	6%	6%
De-listing (including significant reduction in volume) without reasonable notice	5%	1%	7%	4%	3%	3%	3%	1%	4%	1%	3%	2%	3%	3%
Refusal to consider a cost price increase (CPI)/unreasonable delay in agreeing or in implementing an agreed CPI	4%	3%	9%	5%	3%	5%	2%	3%	3%	4%	5%	1%	5%	5%
Requirement to predominantly fund the cost of a promotion	1%	7%	10%	3%	2%	1%	1%	4%	3%	2%	4%	2%	5%	1%
Data input errors (e.g. pricing) not resolved promptly (7 days)	1%	1%	7%	4%	1%	2%	1%	1%	1%	1%	3%	1%	2%	2%
Not allowing time (30 days) to challenge proposed invoice deductions, or deducting even if challenged	1%	1%	8%	3%	2%	3%	0%	2%	1%	0%	3%	0%	1%	1%
Delays in or not receiving payment when there are disagreements about deliveries, including drop and drive	0%	1%	7%	3%	2%	5%	0%	1%	1%	1%	3%	0%	1%	2%
Undisputed invoices not paid according to agreed terms	0%	1%	6%	3%	2%	3%	1%	1%	1%	1%	3%	0%	1%	1%
Retrospective changes to supply agreements	0%	1%	4%	1%	3%	2%	1%	1%	1%	1%	2%	0%	2%	2%
Unilateral changes to supply agreements/terms of supply by Retailers without reasonable notice	0%	0%	4%	1%	2%	2%	2%	1%	2%	0%	2%	0%	1%	1%
Variation of supply chain procedures without reasonable notice	0%	0%	4%	2%	1%	2%	1%	0%	1%	0%	2%	1%	1%	2%
Running a promotional activity at supplier's cost which varies from that agreed in length, positioning, distribution or type	0%	1%	2%	2%	1%	0%	1%	1%	1%	0%	2%	0%	1%	0%
Difficulty in securing appropriate EPOS/warehouse data to validate timely payment from Retailer	0%	1%	1%	1%	2%	3%	0%	1%	1%	1%	3%	1%	1%	2%
Requests for lump sum payments relating to Retailer margin shortfall not agreed at the start of the contract period	0%	1%	4%	1%	1%	1%	2%	1%	1%	1%	2%	1%	2%	0%
Requests for payments to keep your existing business with a Retailer (pay to stay)	0%	1%	4%	1%	0%	1%	1%	1%	1%	1%	2%	0%	1%	0%

How to read this table: for each issue:

- All issues that are 3% or lower are coloured green
- All issues that are between 4% and 6% are coloured amber
- All issues that are 7% or more are coloured red

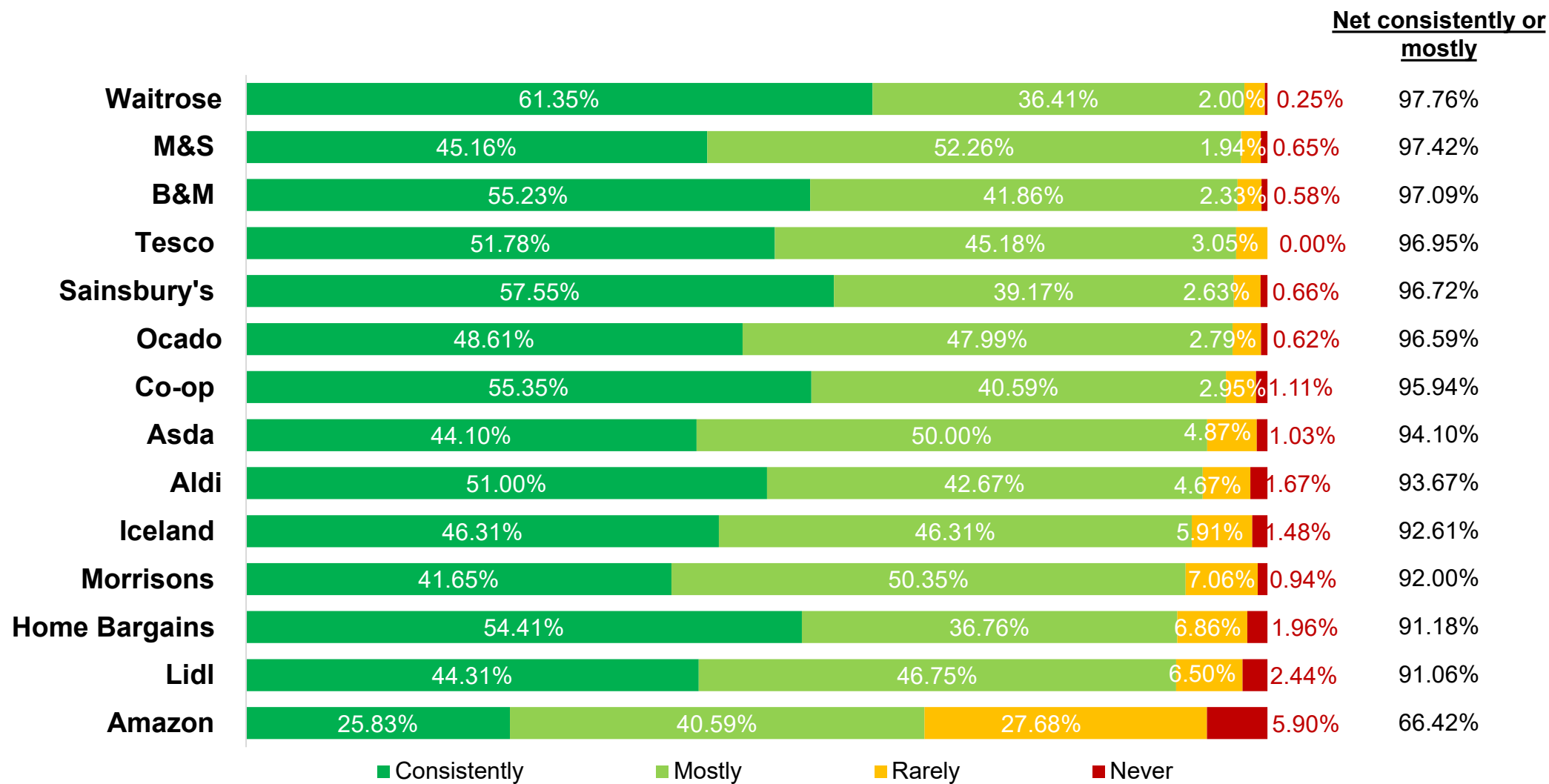
N.B. Retailers have been shuffled and are NOT shown in alphabetical order

Change in Retailer practice over the past 12 months



N.B. Retailers have been ranked by net improvement score to 2 dp.

Overall compliance with the Code



N.B. Retailers have been ranked net 'consistently' and 'mostly' to 2dp.

Perceived compliance with the Code from 2014 to 2025

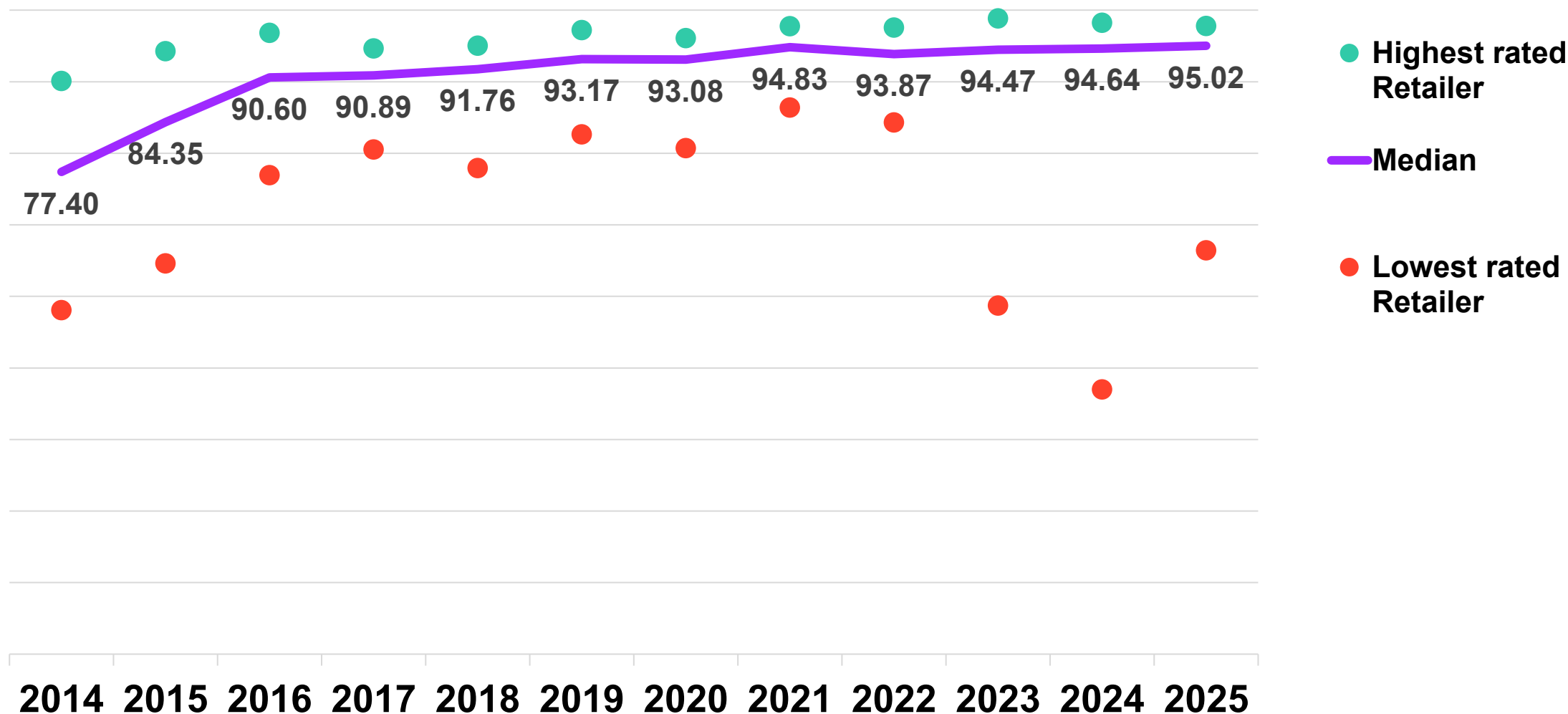
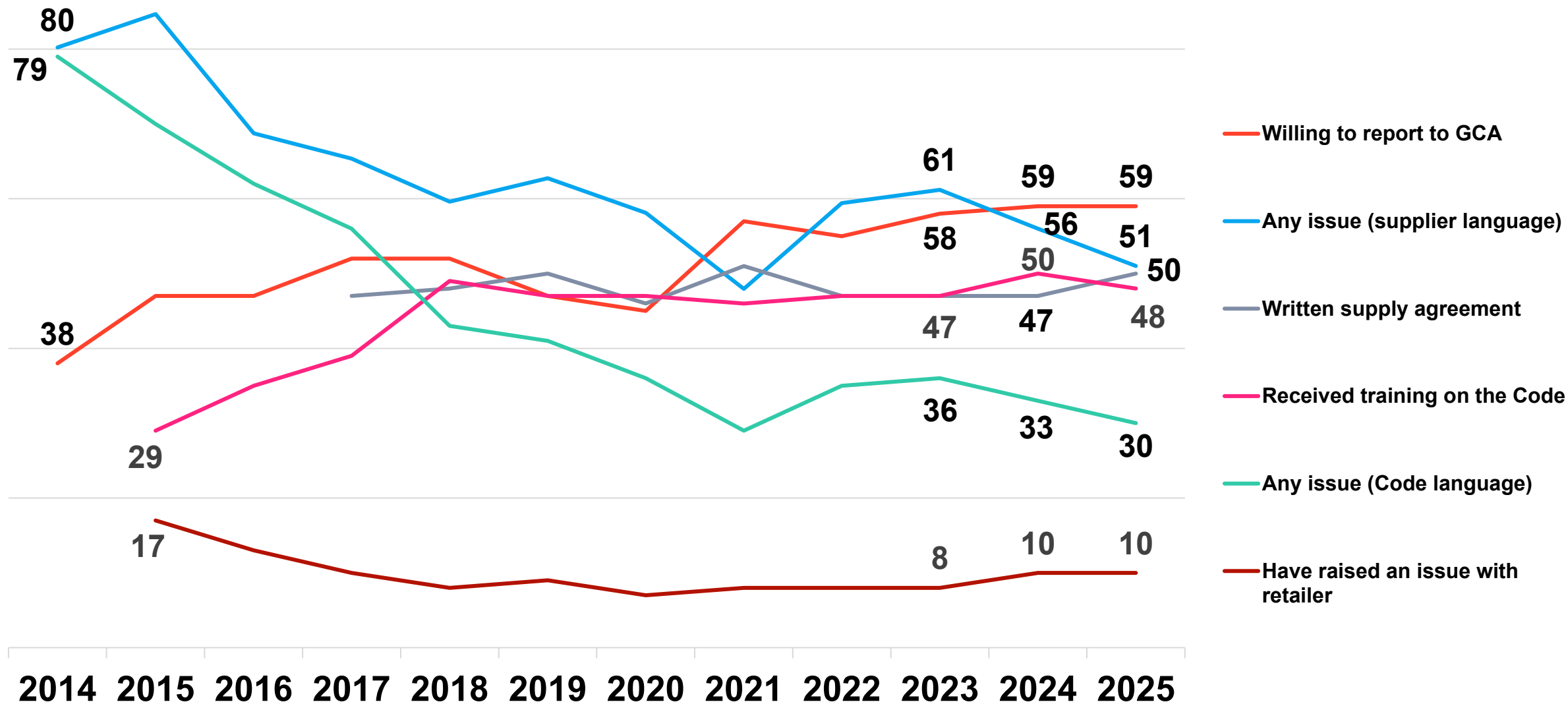


Chart shows the median retailer % for 'consistently' or 'mostly' follow the Code

Selected key trends 2014 to 2025





Groceries Code Adjudicator – The Code and Supplier Experiences 2025

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Method

Overview

The YouGov Qualitative team were commissioned to conduct 28 x in-depth 30–45-minute Zoom/Telephone interviews with a range of direct suppliers that took part in the larger quantitative survey.

The research focused on the following areas:

- Communication, engagement and supplier-buyer relationships.
- Changes to Retailers' leadership, strategies, processes and systems.
- Retailers' attitudes towards innovation.
- Delayed payments, forecasting issues, obligations to contribute to marketing costs and cost price changes.
- Code issues, and motivations/barriers to raising complaints.

The aim of the research was to better understand the state of play for suppliers, the nature of supplier-buyer relationships, and overall Code compliance.

Sample frame

- ✓ All interviewees were direct suppliers.
- ✓ A minimum of three interviews were conducted per Retailer across the list of 14 Designated Retailers.
- ✓ All had a fair/good understanding of the Code and the GCA.
- ✓ Half of the sample consisted of macro businesses and half of smaller/micro businesses.
- ✓ A maximum of 10 of the 28 suppliers interviewed would *not* raise a Code-related issue with the GCA in the future.
- ✓ *None* of the suppliers had taken part in previous years' interviews.

All suppliers were informed that their participation would be treated in the strictest confidence. Their responses have been anonymised to maintain their privacy.

The State of Play in 2024/25

Suppliers have experienced a challenging and turbulent supply landscape in 2024/2025, with expectations for this to continue

Some words suppliers use to describe the industry include...

‘Challenging’

- **Extreme competition.**
- Need to evolve with **consumer habits.**
- **Climate change** affecting supply chains.
- Navigating the impacts of the **cost-of-living crisis.**

“It's challenging in terms of getting shelf space...it's a spinning plates type of scenario...there's always something you need to do to ensure the brand stays on shelf.” (Micro)

‘Volatile’

- Increasingly **erratic** and **turbulent** landscape, due to **climate change, inflation** and **global political and economic volatility.**
- Suppliers are **uncertain** what the future will look like and how to **prepare** for it.

“I think turbulent is a fair word right now...COVID was just crazy for our industry. We came out the back of that...but it's not gonna go away. We're now in a world where climate change is starting to really affect.” (Macro)

‘Rationalisation’ and **‘Consolidation’** are also **increasingly important** features of the landscape...

- Retailers have a **growing focus** on **efficiency** and **streamlined processes**
- Drive to **weed out underperforming stakeholders.**

“[Xx] have got a big rationalisation program going...SMEs [are] the ones that get minced...you don't get involved in the process as much as the big guys do, so you don't get a chance to state...why you are important.” (Micro)

Relationships with Retailers and Buyers

Some reported improvements in Retailer relationships since 2023/24, but poor communication and unstable contractual agreements provoke distrust

Positive Aspects of Relationships

- It is felt that Retailers are **displaying better awareness of and engagement with GSCOP**.
- **Clarity on Retailers' strategy is mixed but considered to have improved** since 2023/24.
- Some suppliers report **increased collaboration with Retailers** and a **boost for innovation opportunities** since 2023/2024.
- Other positives mentioned include **fairness and transparency, mutual respect**, and Retailers' genuine interest in **supporting suppliers' growth**.



Negative Aspects of Relationships

- Many suppliers report **ongoing struggles to maintain effective communication with buyers**. **High buyer turnover and movement across categories** is felt to have caused a **drain of category expertise**.
- **Some buyers display a lack of understanding and/or implementation of GSCOP and fail to take accountability when things go wrong**.
- **Short termism from Retailers continues to be a significant problem**, with suppliers citing **short term contracts, uncommunicated range reviews, and inconsistent ordering patterns**.

The Mechanics of the Relationship

High-level strategy and leadership changes are well communicated, but many suppliers feel ‘in the dark’ regarding changes to processes and systems

Strategy & Leadership

- Most Retailers’ **strategies appear to remain consistent**; renewed focus on **growth and innovation** since 2023/2024.
- **Low prices and promotional depth remain central**, provoking supplier concern.
- **Growing emphasis on health and sustainability**, and on UK-sourced goods.
- **Fresh and imported produce suppliers** appear **more engaged** with Retailer strategy than others.

Practices, Systems & Processes

- **Sharp rise in Retailer portal updates** has partially brought **improved efficiency**, but **teething issues** and **poor tech support** continue to disrupt.
- **Supplier-buyer relationships are increasingly transactional** due to the **rise of the ‘desktop buyer’**, increasing efficiency but reducing **rapport and transparency**.
- **Understaffing** in Retailer teams is viewed as **impacting process**.

Suppliers call for:

- ✓ **Free supplier days and events.**
- ✓ **Improved Retailer alignment on key changes.**
- ✓ **More frequent touchpoints** within Retailer teams.
- ✓ **Dedicated troubleshooting personnel** for effective query resolution.
- ✓ **Live training sessions** on using new Retailer portals.

“Everybody in this industry has cut out heads to maximize profits or at least hold where they are...my feeling is that buyers are doing the best they can, with a lot of suppliers and a lot more work to do.”
(Macro)

Payment disputes are costly in suppliers' time, money and energy

01

Nature & Causes of Payment Issues

- **Delayed payments** stem from **both human and system errors**.
- **Overly complicated payment processes** are commonly cited.
- Some Retailers **do not respect agreed payment terms**.

02

Impact on Suppliers

- **Delayed payments strain suppliers' cash flow**, as they face costs long before product delivery.
- **Retailers appear unaware or indifferent** as to how **delays jeopardise the supply chain**, supplier stability and cash flow.

03

The Dispute Process

- **Dispute resolution can take several months and** usually happens when a **senior Retailer team member** gets involved.
- **Speaking to a human can be difficult**, and the **lack of a clear escalation process or dedicated dispute handler** adds to delays.

04

Suggested Improvements

- **Clear escalation process is needed**, with an **easily accessible, dedicated contact or team** for payment issues.
- **Direct human contact** would **reduce** misunderstandings, **increase** efficiency and **speed up** the process.

*"[Xx] For the last two years it's been me constantly asking 'Why is this short paid? Can you send me a debit note?'...they're just so poor with communication and no one seems to know what they're doing."
(Macro)*

"If [the payment terms] is 60 days, it should be paid on 60 days. Otherwise call it 72 days and pay on 72 days...'cause at least then you can make adjustments for it....it has a big knock-on effect." (Macro)

"Trying to get to an actual human being who...has the authority to make decisions and review the evidence...is just painfully difficult and unreasonable so." (Macro)

Forecasting continues to be described as a persistent challenge

01

Forecasting Challenges & Inaccuracy

- **Computer-generated forecasts** are often **unreliable, unclear, and unusable**.
- Many suppliers use forecasts as a guide but **lean heavily on their own expertise and experience** for correcting errors.

02

Operational & Stock Management Issues

- **Poor forecasting and erratic Retailer behaviour** create **cost and planning issues**, particularly damaging to fresh produce and imported goods suppliers.
- **Failures to meet stock targets** result in **negative feedback**.

03

Retailer Responsibility

- Retailers often appear **unwilling to accept responsibility** for forecasting issues.
- The **onus** is frequently placed on the supplier to **deal with unsold stock, or to supply stock at short notice**.

04

Suggested Improvements

- Giving suppliers **free access to sales data**.
- Implementing a **minimum weekly order commitment**.
- **Updating portals** for a more **streamlined forecasting process**.

"The [xx] forecast can be really volatile, especially on high performing lines, and at promo periods...They have continually been under ordering, so then our availability to promise is too low."
(Macro)

"The forecasts that you receive are very inaccurate and doesn't reflect what they order. And then if you don't fulfil the orders, you get feedback...it always comes back on the supplier that we are inflexible." (Macro)

"If for some reason sales don't come in against the forecast number...we are left with a surplus of stock or a stock problem...there seems to be zero accountability on them to rectify the problem." (Macro)

Most have not been obliged to contribute to marketing costs, but flag Retailers' persuasive sales tactics regarding promotions

01

Attitudes Towards Marketing Costs

- Many suppliers have **not experienced a direct pressure to contribute to marketing costs**, though they note **Retailers' persuasiveness** for suppliers to **spend on their rate cards**.

02

Lack of Transparency & Fairness

- Retailers are felt to be wary about **sharing rate of sale information** with suppliers – meaning suppliers sign over money for marketing without **knowing what they can expect in return**.

03

Obligations to Contribute to Marketing Costs

- Reports of being obliged to contribute to marketing costs are **anecdotal but significant** – some describe being led to believe that they are **contractually obliged to contribute**, or risk being **suppressed/de-listed**.

04

Suggested Improvements

- It's felt that **increased awareness of GSCOP** (particularly among micro suppliers) would help empower suppliers to **identify unreasonable requests**.

"When you want to launch something...[xx are] very persuasive/aggressive on taking up their internal suite of options and why wouldn't they?...They're selling you things as well as buying things from you." (Micro)

"There's very rarely a conversation about it. [They say] 'This is what you spent last year'...And you are like, 'so how are we gonna get the sales there to warrant that spend?' And that's where the conversation falls off a cliff." (Micro)

"I've got a lot of experience...I know where a line's drawn and I have no issues with it...Some people may not know what an unreasonable request is or a reasonable request is." (Micro)

Conversations around cost are more reciprocal, though Retailers often overlook the complications behind increases or decreases

01

The Cost Landscape

- **Growing promotional expectations** impose **additional costs** on suppliers.
- It's felt that **macro suppliers get the biggest say on cost price.**
- **Awareness and understanding of EPR** are mixed.

02

Cost Price Increases

- Suppliers approach **CPIs** with **great caution.**
- **Retailer reactions vary** by product and brand strength.
- There's concern that **securing CPIs will become more difficult**, despite **rising cost pressures.**

03

Cost Price Decreases

- Many suppliers are still recovering from **inflationary backlogs** – CPDs squeeze them even further.
- Premium/bigger brands have **more leverage to decline CPDs.**

04

Suggested Improvements

- Retailers rarely **explain** their resistance to CPIs or need for CPDs clearly - providing **clear feedback** would enable **negotiation.**

"[EPR] is on the radar. Everybody knows it's coming...but the mantra from [xx] was, let's all work together to try and avoid these costs...it's nonsense...suppliers are at a point now where they've got nothing left to play with." (Macro)

"The price of [xx] has probably increased with 50% since last year, and it's extremely hard to have realistic conversations with [xx] because you're in a contract...there needs to be flexibility." (Macro)

"[Xx] I find very easy to work with...from a pricing point of view...we sometimes have some pushback, but it's generally 'can you explain this to us', very open and wanting to get more information rather than combative." (Micro)

Innovation and Commercial Strategy

Conversations around innovation and strategy are often clear in theory, but implementation can be messy and long-winded

Strategy

- **Communication from senior leadership** is generally **strong on strategy**.
- However, buyers **don't always act in alignment** with Retailer strategy.
- Suppliers attribute **frequent leadership changes** and **short-termism** to **volatility** in strategy.
- Increasingly, suppliers are turning to **market reports** and **trade press** to interpret Retailer strategies.

“

Their strategy 12 months ago was very different to the one that they set out six months ago, which is now transitioning to something [else]...almost as though it's not working. (Macro)

Innovation is talked about more than it actually happens...systems and procedures stifle good ideas. (Micro)

We get a lot of positive signs from the Retailers [but] they don't actually commit to anything. (Macro)

”

Innovation

- Some suppliers note **increased innovation since 2023/24**, but **significant roadblocks** remain.
- Retailers often express **interest in innovation**, yet **decision-making can be slow, capacity-limited, or shaped by exclusivity demands**. Buyer **knowledge gaps** can also quickly **derail** ideas.
- For **micro suppliers**, **exclusivity** is rarely **viable**.
- Innovation needs **clear processes, flexible shelf strategies, and greater support** – especially for suppliers with fewer resources.

Raising Issues, the Code and the GCA

Awareness of 'no retaliation' is high, but this does not translate to confidence in raising Code issues

As with 2023/2024, previous experience and hearsay guide scepticism.

Awareness Challenges

Awareness of CCOs is **generally high** but **few have used them**.

Low understanding of how issues are dealt with in confidence/how impartial a CCO can truly be.

Some suppliers appear **unaware** of the **Tell the GCA reporting platform**, citing a need for **anonymous support**.

Concerns over Outcomes

Many will only **escalate payment concerns** when they **cannot afford** to let the issue go **unchallenged**.

When suppliers *have* raised issues with CCOs, outcomes have sometimes been **disappointing**.

Even when escalation does achieve results, the **underlying systemic problems** (e.g., faulty invoice systems, automated portals) **often remain unresolved**.

Lack of 'Real' Need

Many suppliers **weigh up the seriousness** of an issue against the **potential damage** of raising a complaint.

While some suppliers note the **effectiveness** of citing the Code for **moving conversations along**, others view mentioning the Code as overly **combative**.

"We raised an issue with the CCO. They came back and said there was no breach, because they didn't consider the reduction in range to be 'significant.'" (Micro)

"I expected to call someone independent about [xx]...then found out I'd be calling someone inside [xx]. The anxiety was through the roof." (Micro)

Suppliers praise the impact that GCA has on the industry – but see room to instil greater confidence and increase issue-raising

Address 'Grey Areas'

Vague wording on **fairness, equity, significance and reasonableness** empowers supermarkets to **set terms**.

Suppliers feel **unable to challenge** CCO's Code interpretations (or know how to) – **clearer guidance** would provide much-needed **clarity**.

Feedback loops are lacking, with suppliers **not always informed** *how* their complaints are assessed.

Raise Awareness of GCA's/CCOs' Roles

Awareness of GCA's actions remains **low**.

Greater visibility of casework would **build confidence** that issues are being **resolved**.

Lack of a **clear enforcement record** leaves some suppliers **frustrated**, noting little **evidence of public action** such as fines, naming and shaming, or legal proceedings against Retailers.

Support for Micro Suppliers

Create **lighter-touch pathways** that **reduce cost and complexity** for **smaller suppliers** when navigating compliance processes.

Create **clearer guidance** on **escalation routes** - including who suppliers can **approach** before raising an issue, and who they can **turn to** if they need to **challenge** a CCO's interpretation.

Key Learnings

Key learnings from 2025

01

Retailers are showing **far more movement** this year on **strategic positioning and openness to innovation and NPD ideas**. However, strategies often remain **in flux**, and suppliers are facing **growing pressure to keep pace with the changing landscape** – or risk being **outcompeted**.

02

Cost pressures remain intense and are becoming **increasingly complex**. This year, the squeeze comes from **multiple fronts**: ongoing **inflation**, further rises in **key commodities**, **National Living/Minimum Wage increases**, and the looming cost of **Extended Producer Responsibility**. The challenge surrounds which suppliers can **add value** while remaining **cost-effective**.

03

Retailers are **leaning more heavily on promotional frequency and depth** - shifting away from the cost-price reduction requests that characterised findings in 2023/2024.

04

Conversations with suppliers suggest that **‘no retaliation’ assurances are not working in practice**. Greater **transparency** on how CCO **decisions are reached**, what **support pathways** exist to **challenge them**, and **visibility of case volumes** would build much-needed **confidence** in CCOs.

05

Forecasting issues have always posed challenges for suppliers, but their concerns increasingly surround the **availability of supply**. Suppliers expect to see **further instability** in the global supply chain due to **geopolitical issues, climate change and economic volatility**.

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Adjudicator

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