

GCA Annual Survey 2026

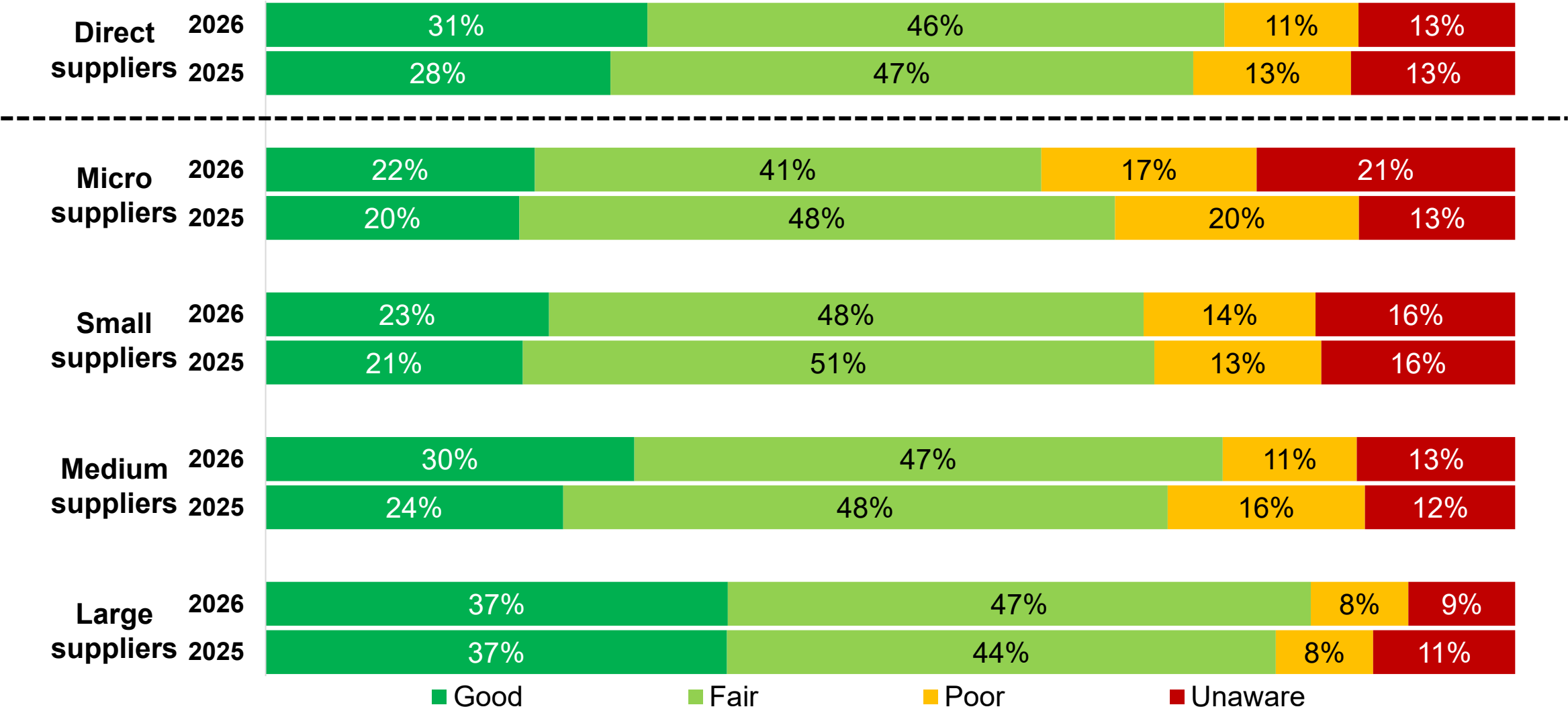


Groceries Code
Adjudicator

YouGov[®]

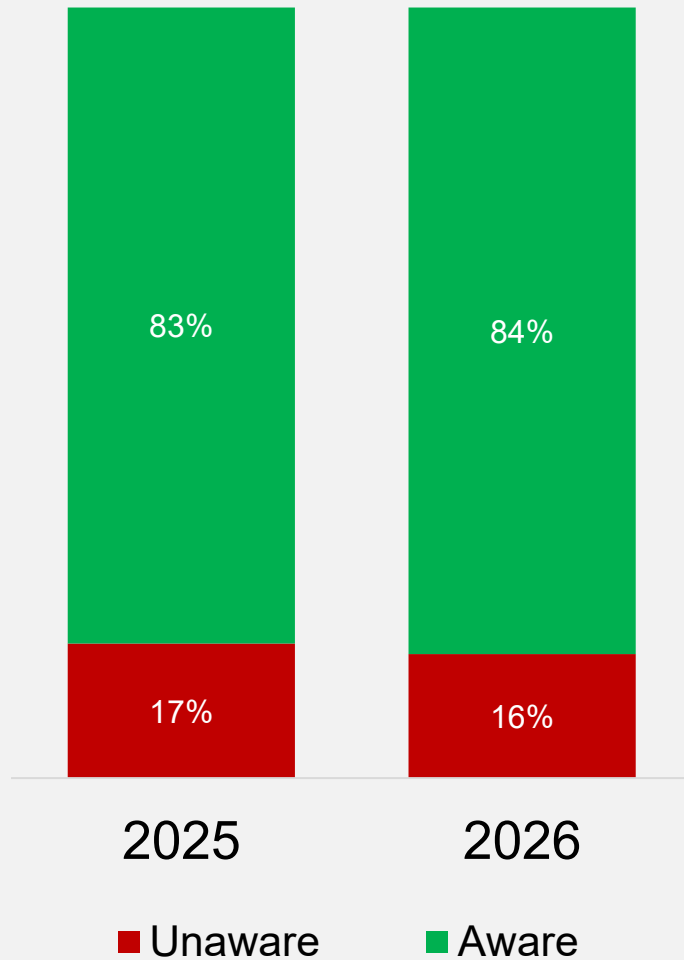
Understanding of the Code

Direct suppliers

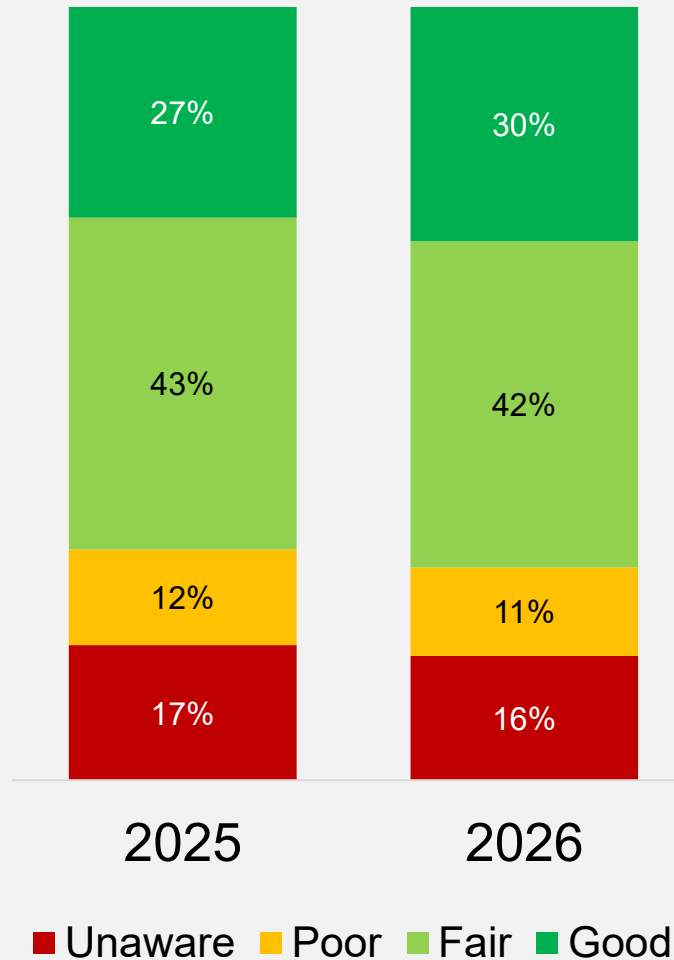


Awareness and understanding of the GCA's role

GCA awareness



Understanding of the GCA's role

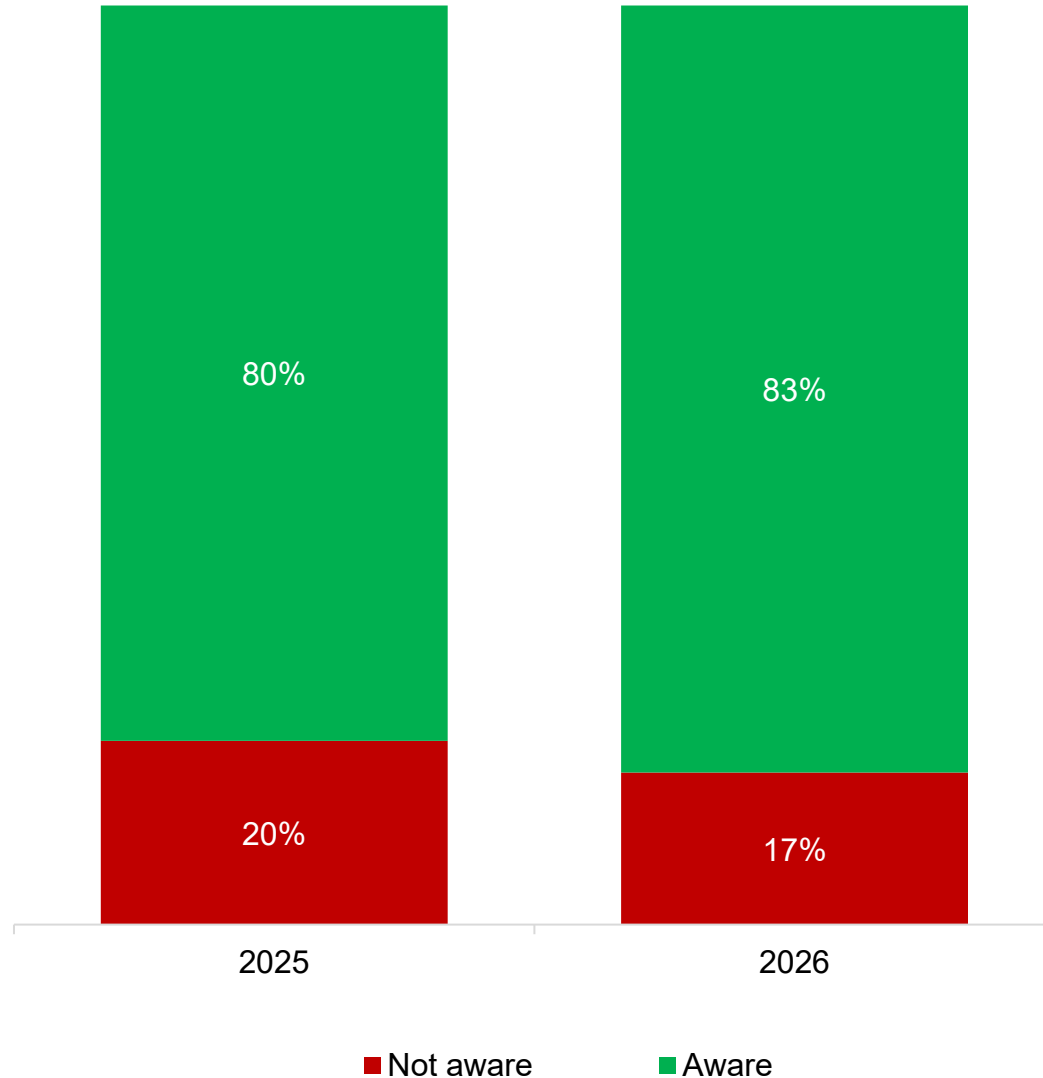


The larger the business the more likely it is to be aware of the GCA. 72% of micro suppliers are aware of the GCA, compared with 88% of large suppliers.

Similarly, businesses in the UK are more likely to be aware of the GCA (86%) than businesses outside of the UK (76%).

Awareness of GCA confidentiality

Awareness by direct supplier size



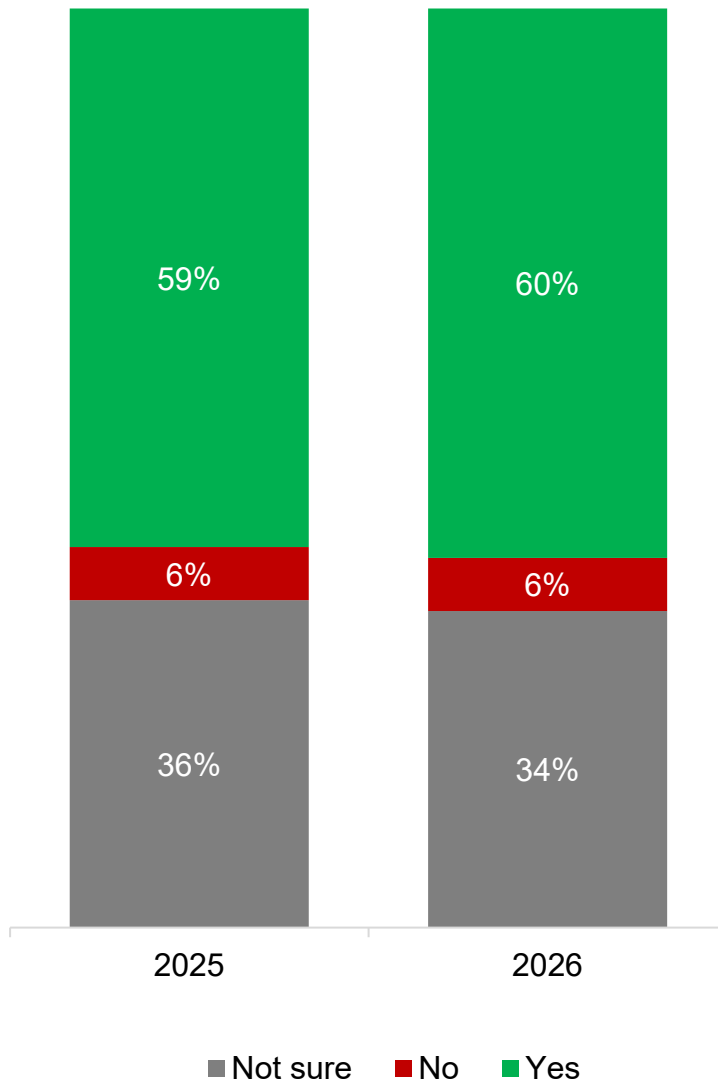
71% of micro suppliers

81% of small suppliers

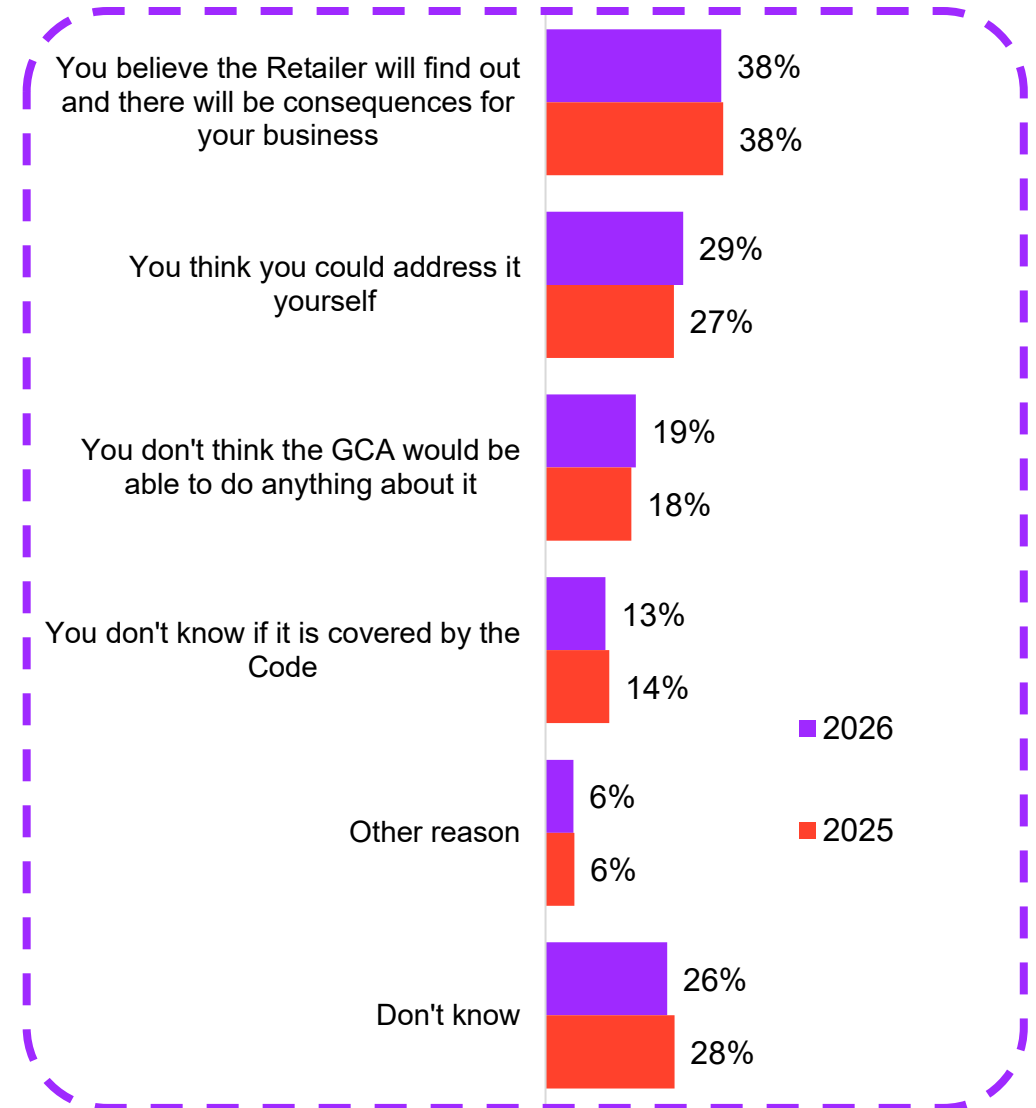
86% of medium suppliers

87% of large suppliers

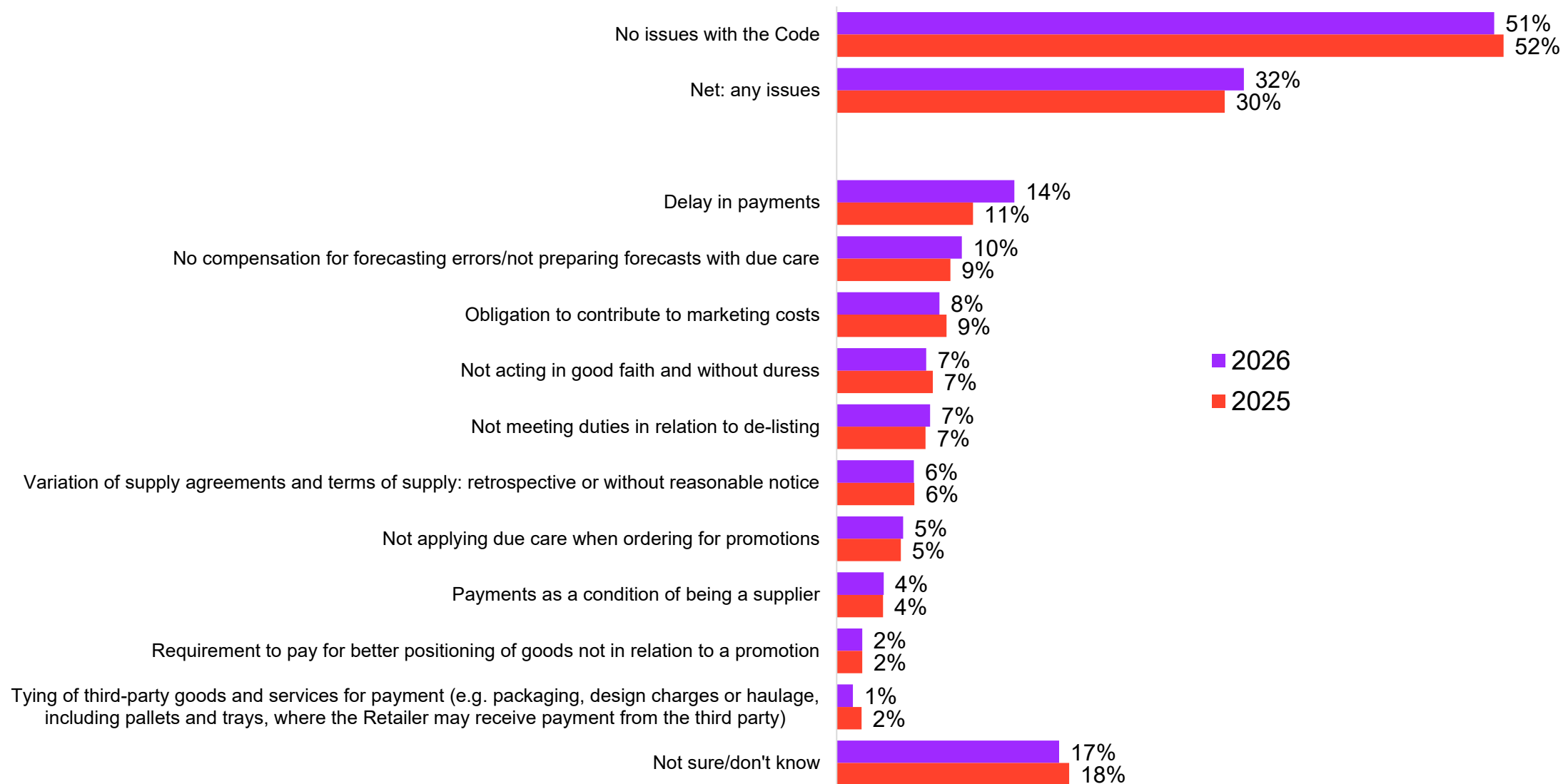
Why suppliers may not raise issues with the GCA



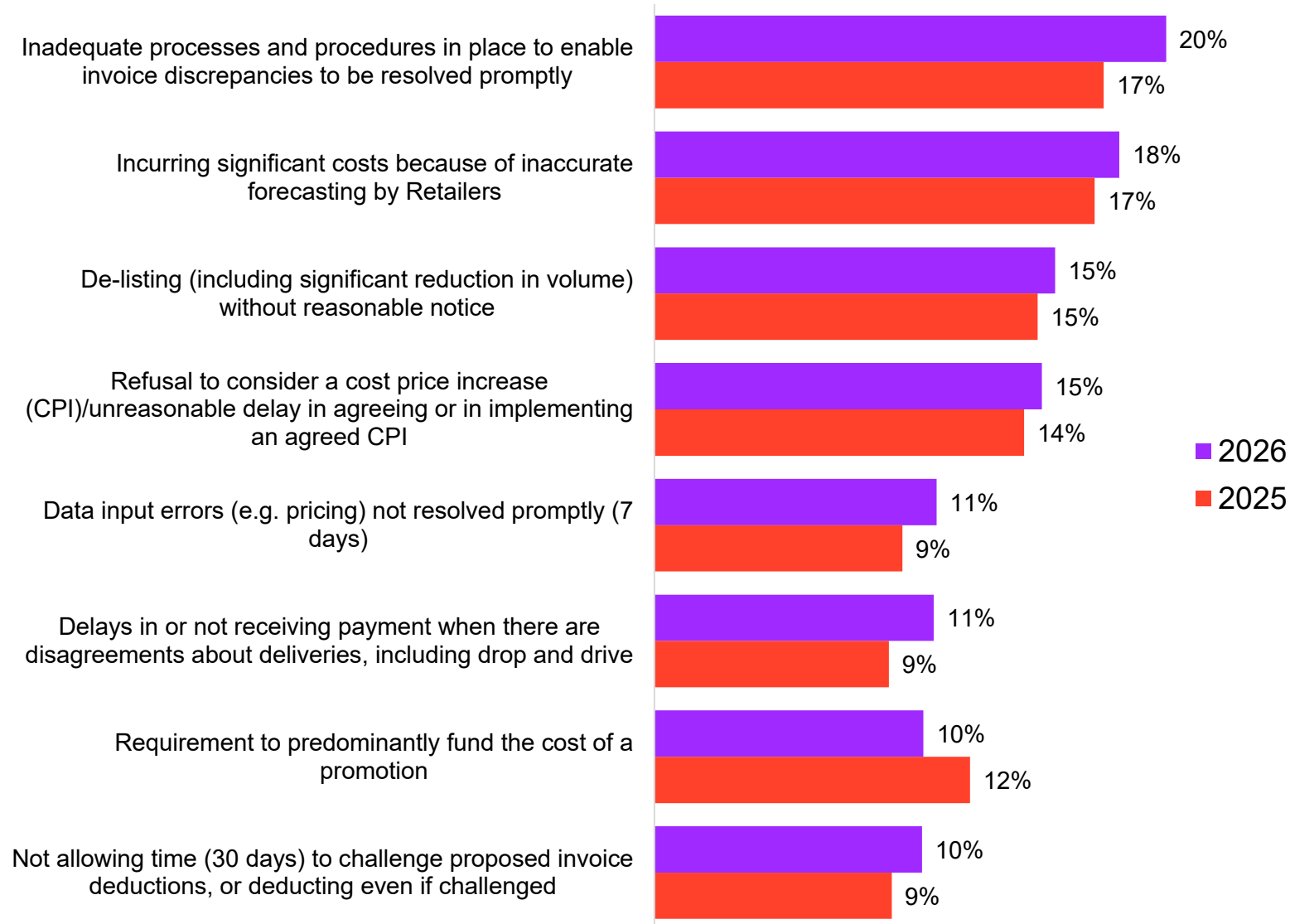
Among this
40%...



Issues experienced (in Code terms)

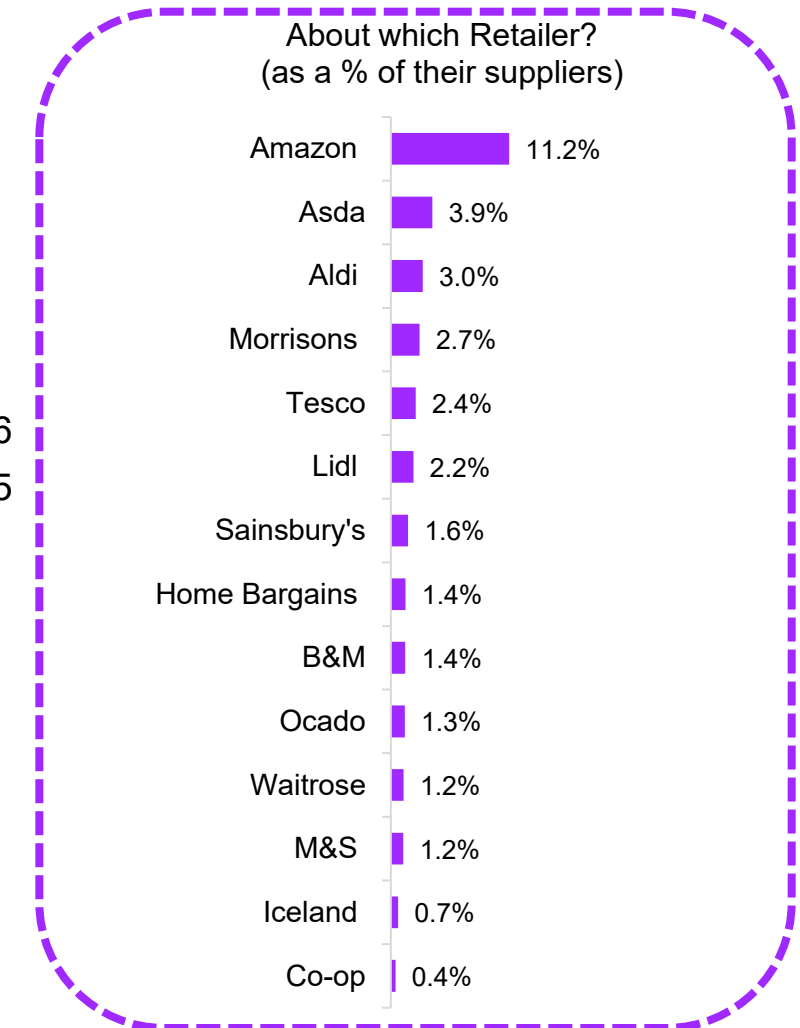


Issues experienced (in supplier terms)



Note: issues mentioned by 10% or more in 2026 are included

8% have raised an issue with a Retailer in the last year



Issues experienced (in supplier terms) – by Retailer

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

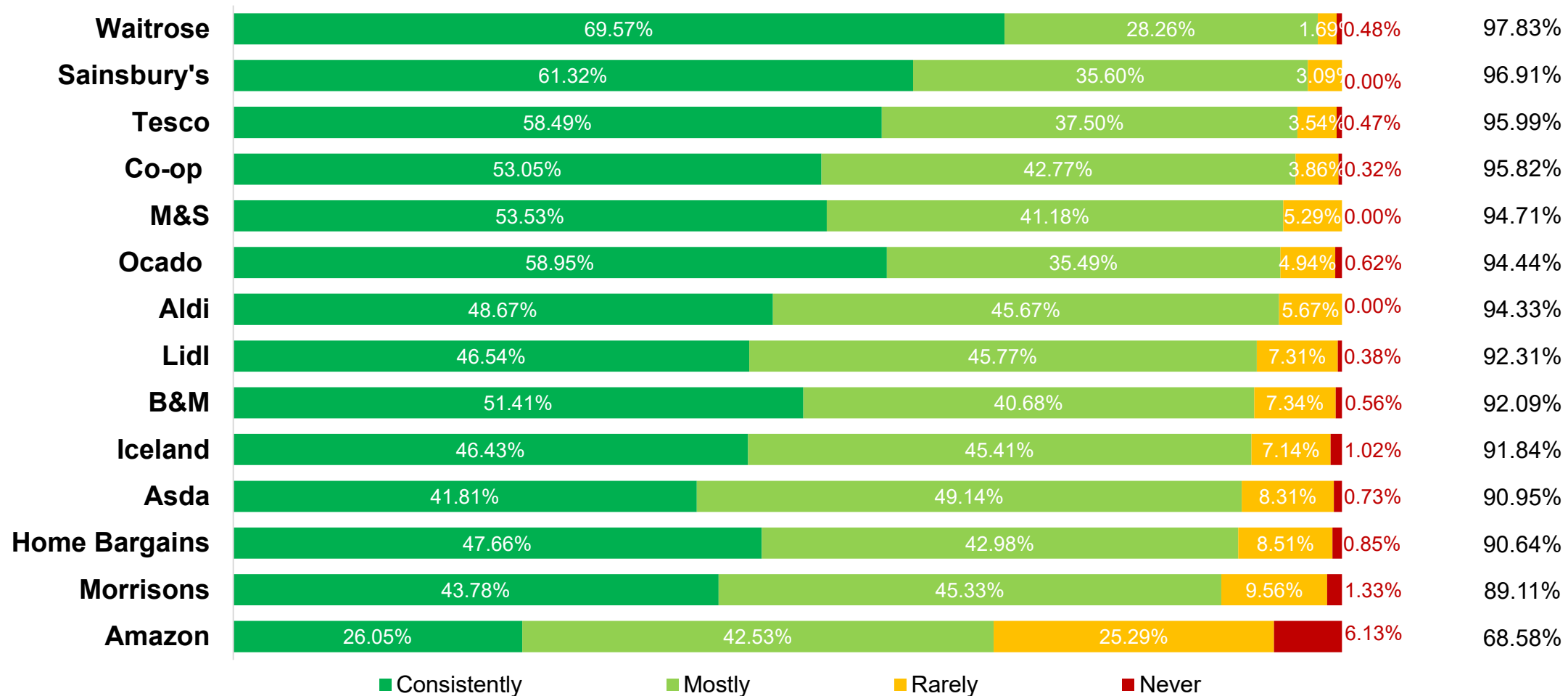
How to read this table for each issue:

- 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

Overall compliance with the Code

Net consistently or mostly



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

Perceived compliance with the Code from 2014 to 2026

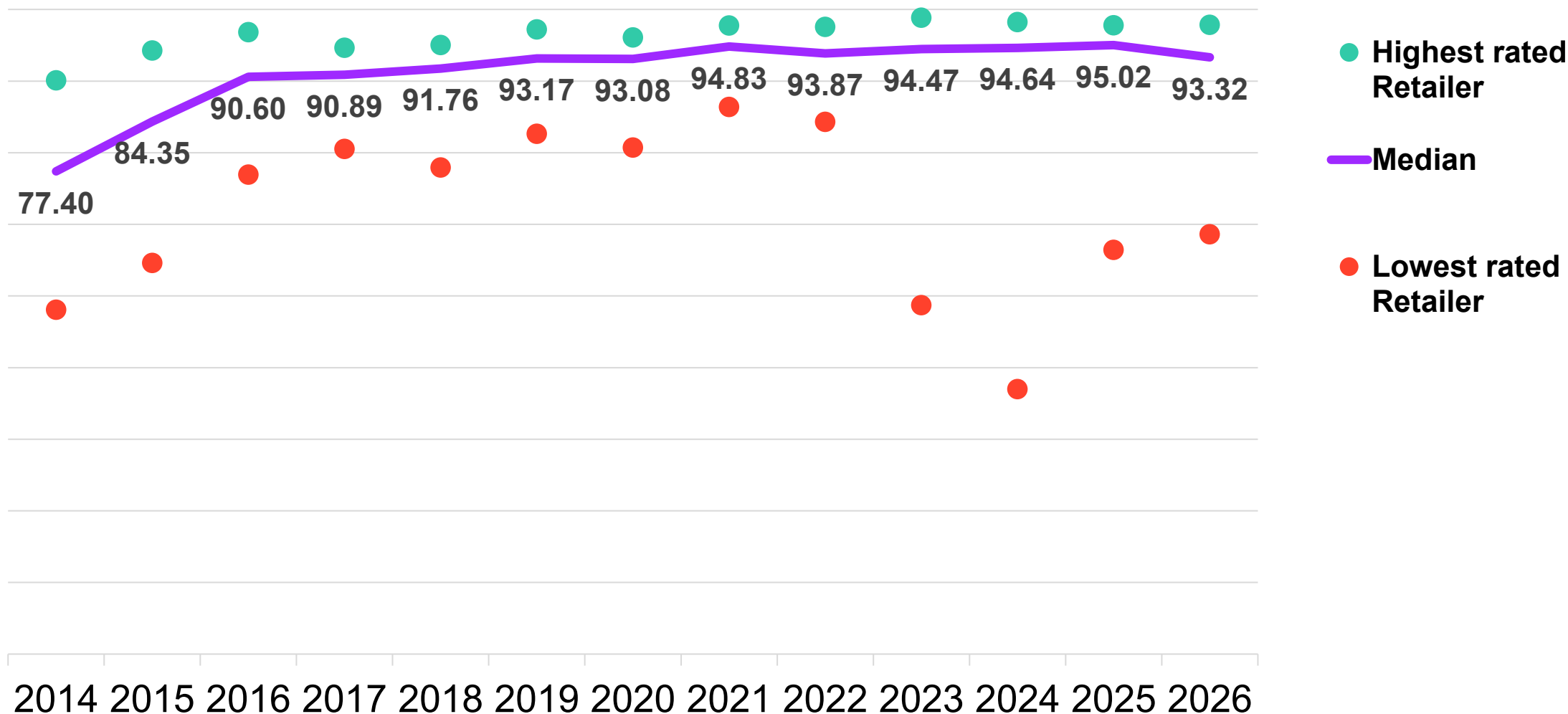
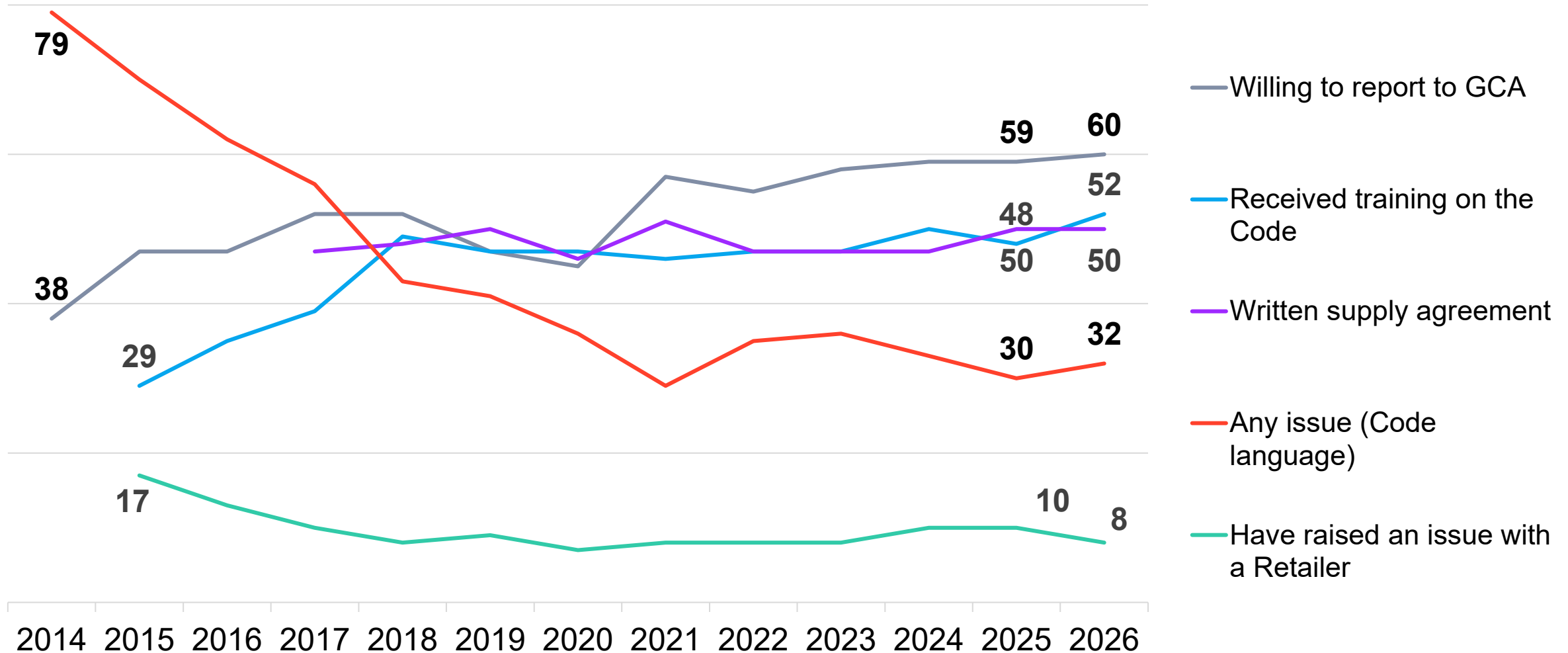


Chart shows the median retailer % for 'consistently' or 'mostly' follow the Code

Selected key trends 2014 to 2026





Groceries Code Adjudicator – Supplier deep dive 2025/2026

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Method

Overview

YouGov Qualitative were commissioned to conduct 28 x in-depth 45-minute Zoom/Telephone interviews with a range of direct suppliers that took part in the larger quantitative survey, for the GCA's yearly tracking study.

The research focused on the following areas:

- The current state of supplier-Retailer relationships, and how they're changing.
- Suppliers' understanding and perceptions of Retailer commercial strategy.
- How cost conversations have evolved since 2024/2025.
- Suppliers' willingness to raise Code issues and barriers to raising them with the buyer, CCO or GCA.
- Testing suppliers' trust and confidence in confidentiality and no-retaliation commitments.

The aim of the research was to better understand direct suppliers' experiences of Retailer relationships and Code compliance over the past year, with a focus on identifying and examining barriers to raising issues.

Sample frame

- ✓ All suppliers interviewed 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 GSCOP and the GCA.
- ✓ Half of the sample consisted of **larger/macro** businesses, and half of **smaller/micro** businesses.
- ✓ We recruited a **maximum of 10 suppliers** who said they **would not raise a Code-related issue** with the GCA in the future.
- ✓ All suppliers had **not taken part** in last years' interviews.

Relationships with Retailers and buyers

Suppliers tend to view their relationships with Retailers as nuanced and highly variable, rather than uniformly positive or negative

Elements of more positive relationships:

- **Accessible buyers.** Having stable lines of communication with buyers is crucial. When buyers prioritise accessibility, this leads to dramatically better relationships.
- **Stability and mutual reliance.** Several suppliers cite the benefits of having longstanding relationships built on mutual trust and accumulated goodwill, sometimes after decades of partnership.
- **Transparent and collaborative communication.** Many praise certain retailers for their supportive approaches to collaboration.
- **Enabling innovation and rewarding profitability.** Some suggest that Retailers engage more heavily with suppliers that deliver good results, implying that hard work pays off for some suppliers.



Elements of more negative relationships:

- **Power imbalance.** It is felt that Retailers hold the power and leverage it to get what they want out of suppliers.
- **Selective responsiveness.** Buyers are often described as responsive when *they* want something and going quiet when the supplier needs something.
- **Slow decision-making.** Many suppliers describe facing difficulty negotiating, suggesting certain Retailers use delay tactics to avoid difficult conversations.
- **Automation.** As reflected in 2024/2025, the automation of the supplier-buyer relationship continues, critiqued for leading to less collaborative, more transactional relationships.

Overall, suppliers describe relationships where trust and fairness are unevenly distributed

Supplier levels of risk exposure:

Most exposed to risk

Least exposed to risk

The smaller the supplier, the more they describe **accommodating rather than collaborating** with Retailers.

Own-label suppliers are more **structurally exposed to Retailer cost pressures**.

Dependency on one/few Retailers leaves suppliers highly exposed, as *losing* a relationship poses an existential threat.

Commodity or fresh produce suppliers describe the most **price-focused, transactional relationships**.

Fresh, perishable, and weather-dependent producers face intense pressure, carrying **high production risks** and exposure to **cost volatility**.

Micro vs. macro
supplier

Own-label vs. branded

Supplying one/few
Retailers vs. multiple/
many

In commodity category
vs. niche category

Fresh, perishable, and
weather-dependent vs.
ambient or processed
goods

Larger suppliers have **structural advantages**: dedicated account teams, top-to-top relationships, brand credibility.

Branded suppliers tend to have **better negotiating leverage and more resilience to range rationalisation**.

Suppliers of multiple Retailers have higher resilience, with better ability to **absorb losing a relationship**.

Niche category suppliers often operate with **few competitors**, giving them leverage to **negotiate**.

Ambient or processed goods suppliers face **less acute supply chain issues**. Challenges are more about **cost negotiation and category importance**.

Innovation and commercial strategy

Retailer strategy is generally clear if suppliers are prepared to seek out the information, but implementation of strategy is often uneven

Suppliers report strong understanding of Retailer strategy, describing it as one of the things Retailers are communicating best.

Strategy visibility

Retailer **conferences/strategy events** are cited as **the greatest source of strategy information**. Various also mention attending quarterly business reviews for investment, pricing, and category updates.

Some Retailers are **praised for moving away from paid IGD conferences to free, virtual updates**. However, suppliers continue to describe **pay-to-access strategy events as a significant barrier** – particularly for suppliers with less financial flexibility.

Suppliers increasingly report **building their own strategy intelligence**, through **trade news, store visits, research reports, and online sources**.

Strategy implementation

Inconsistency between stated strategy and practice is felt to be common; even Retailers that are viewed positively on strategy overall are not uniformly seen this way.

Inconsistent implementation can look like:

- **Broken commitments** (e.g., exclusive product deals dropped when circumstances change)
- **Conflicting signals from buyers**
- **Lack of support and follow-through** on stated intentions (e.g., range reductions limiting new product success)

Some branded suppliers find increased opportunities to innovate, while own-label suppliers can struggle with limited support

Retailers are becoming more selective in their innovation support, prioritising categories aligned to strategic growth areas such as health and wellness, and premiumisation.

Innovation opportunities

Compared with 2024/2025, some suppliers experience increased Retailer appetite for innovation.

Suppliers whose offerings already align with strategic priorities are favoured for investment. For example:

- Health-focused suppliers benefit from **lower-HFSS priorities and wellness trends**.
- Luxury product suppliers benefit from **premiumisation**.
- British-sourced suppliers benefit from focus on **British goods**.

Other suppliers **seek ways to make their offering more attractive for investment**. This is sometimes possible, if they can provide **data and proof of commercial value**.

Innovation risks

While suppliers in trending categories are prioritised, others struggle to innovate at all (e.g. suppliers in snack categories limited by regulated ingredient pressures).

Some cite requests for innovation that put the supplier at commercial risk; own-label suppliers describe receiving requests for bespoke innovation, with small production runs and cost pressures limiting returns and endangering their business if a relationship ends.

Some suppliers also report reluctance to discuss opportunities with buyers, fearful that they may develop similar propositions with other suppliers.

Cost conversations

Suppliers' experiences around cost are highly inconsistent; some report improvements while others cite endless pushback

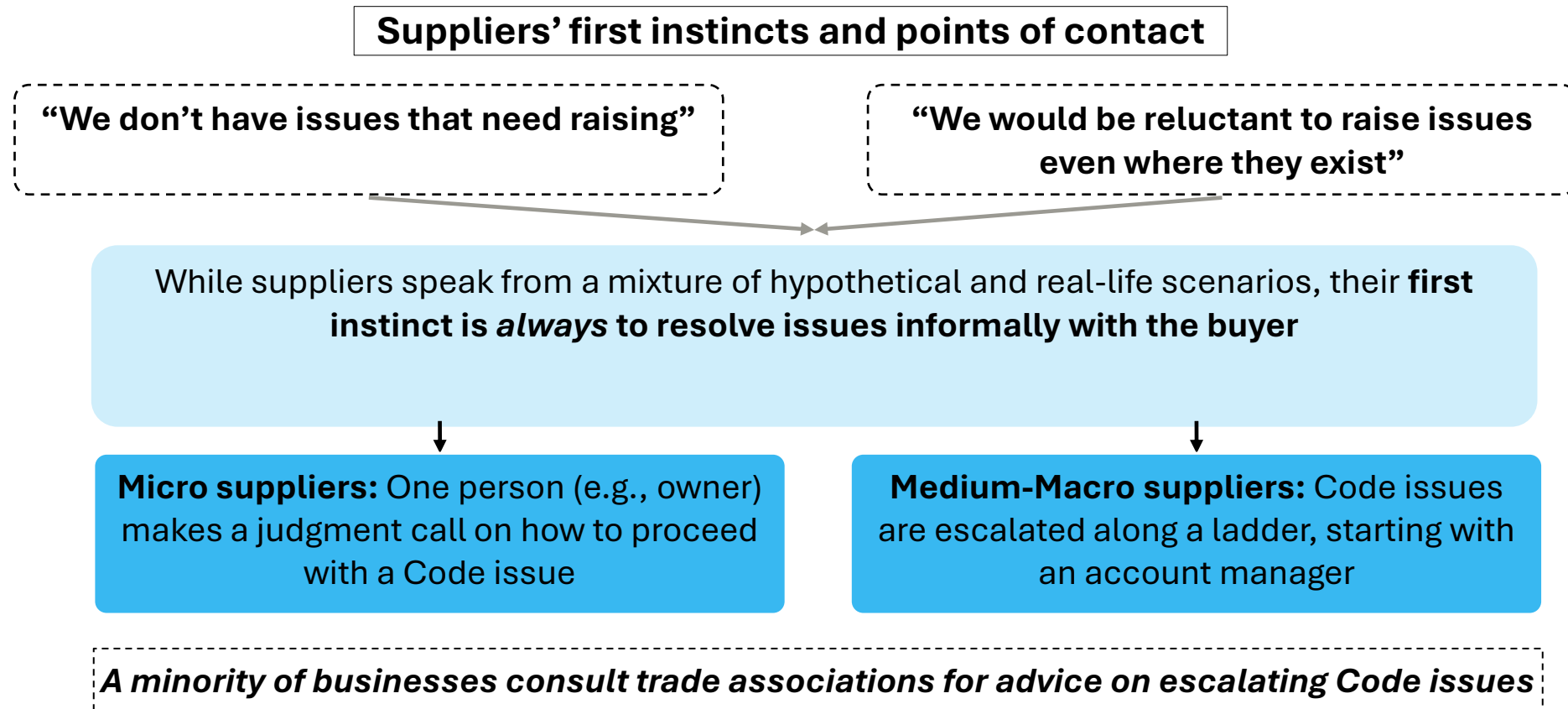
While the grocery industry faces ongoing, competing challenges, supplier experiences appear to be shaped largely by individual buyer and Retailer behaviours.

The cost landscape	Who's most exposed?	How suppliers respond
It's felt that buyers are under even greater pressure to resist or minimise CPIs, despite clear cost pressures on suppliers. Cost conversations operate from a more volatile baseline; fallout from the US-Iran war comes on top of pre-existing, competing pressures. Increasingly complex cost justification processes make negotiations harder, with longer periods of non-response, more last-minute decisions and frequent stalemates.	Fresh, perishable, and weather-dependent suppliers are most exposed to cost pressures, often faced with intense supply chain volatility, and expectations of honouring guaranteed pricing agreements. Suppliers in own-label categories increasingly operate in a permanent tender cycle. Meanwhile, branded suppliers cite greater pressure to fund promotions, retail media and marketing investments.	Most treat CPIs as a last resort, preferring to absorb extra costs over commercial risk unless absolutely necessary. Some suppliers with stronger bargaining leverage may refuse to supply Retailers as a last-resort negotiation tool. Suppliers with weaker leverage continue to defend their position through cost competitiveness, or increasingly, adapting their commercial models (e.g. order-by-order pricing, temporary surcharges).

Understanding the escalation journey

Suppliers are split, with many saying that they have no issues to raise, and others saying that they *do* have issues but are reluctant to raise them

Regardless of their current context, suppliers' first instincts converge almost universally on the same thing: resolving issues informally, directly with the buyer



Suppliers balance an array of considerations before deciding whether escalating beyond buyer level is worth the risk

Their greatest concerns revolve around the possible damage raising an issue could do to the working relationship.



Relationship risk

Escalating beyond the buyer feels like a signal that the relationship has failed. The perceived severity of escalating makes suppliers fearful that the relationship could be irreversibly damaged or lost entirely.

Retailer-supplier power imbalance. Willingness to raise Code issues correlates heavily with suppliers' exposure to risk, and how able they are to absorb a lost relationship.



Trust in the mechanism

Distrust in confidentiality. Suppliers sense that many Retailers and buyers strongly dislike suppliers using CCOs and the GCA, and fear of exposure deters them.

Poor understanding of how issues are resolved. Grey areas lead to hesitation; many are uncertain how issues are investigated and have a limited understanding of possible outcomes.



Cost-benefit calculation

Scepticism that raising issues is worth the risk. Some smaller issues can be absorbed or overlooked; unless a Code issue carries significant financial risk, raising it might be ill-advised.

Reputation and career concerns. Internal culture and fears of poor business outcomes can discourage escalation, particularly among those in less senior roles.

Suppliers also have a variety of assumptions about what raising Code issues is like, which heavily influences their attitudes

These assumptions are driven by hearsay, guesses and some first-hand experience of dealing with Retailers and CCOs.

01

Most suppliers believe that if they raise an issue with a CCO/the GCA (but especially a CCO), their identity will likely become known.

- Many struggle to imagine how Retailers can be challenged without revealing identifiable info; concern is especially acute among micro and niche category suppliers.
- Awareness of how issues are investigated is also very low.

02

Some believe that if a case is taken to the GCA, the Retailer is under no obligation to carry on trading afterwards.

- Some suppliers assume that the outcome of going to the GCA is a Retailer fine, and that the supplier-Retailer relationship will end.
- The ongoing benefits of a business relationship are viewed to outweigh the value of a fine.

03

Many believe that raising an issue could damage the relationship, even if nobody retaliates.

- Suppliers do not necessarily expect blatant retaliation but expect relationships to become transactional and distrustful with tougher negotiations.
- They assume that Retailers could 'play the long game' and retaliate later in subtle, unprovable ways.

04

Suppliers think there is a considerable risk that the process may not solve their problem.

- They anticipate slow investigations, that complaints might not be seen as breaches, or that the CCO may side with the Retailer.
- Suppliers know what they could *lose* by reporting, not what they will *gain*.

Supplier trust and confidence

Positive experiences with individual CCOs do not fully overcome concerns about the role itself

Suppliers sometimes distinguish between trust in a particular CCO and trust in a Retailer-employed function. As a result, positive interactions can coexist with continued reluctance to raise issues overall.

Positive experiences are often attributed to the individual

Many suppliers who have engaged with CCOs report **constructive experiences** where issues were **resolved successfully**.

However, this **does not translate into wider confidence**.

Some worry that **‘it only takes one bad CCO’** or feel that **taking an issue to a CCO can be an unnecessary, radical response**.

Suppliers question how independent CCOs really are

Suppliers continue to see CCOs as part of the Retailer, closely connected to buyers and commercial teams, and ultimately accountable to the Retailer.

Several suppliers compare CCOs to HR: **expected to operate fairly but ultimately serving the interests of the Retailer**.



Suppliers describe **feeling more comfortable when CCOs appear removed from buying teams**.

Suppliers also want to see more information on the number of complaints received and resolved by CCOs. The prospect of CCOs routinely dealing with issues **makes concerns about being identifiable less prominent**.

Reactions to CCOs' confidentiality commitment and Retailers' non-retaliation agreement reveal a gap between awareness and confidence

“In 2023, Retailers committed to no retaliation when a supplier brings a Code issue to the business. This is along with a previous commitment by CCOs to hear supplier issues in confidence.”

Awareness of commitments

Awareness is broadly high but mixed; some suppliers are familiar with only one, and others unaware of both.

- Suppliers become aware through **training, GSCOP updates, conferences, trade media, and independent research.**
- Several micro suppliers describe **actively researching the Code themselves as a potential safeguard**, rather than recalling a consistently communicated message.

Supplier attitudes

Suppliers' concerns about retaliation are typically framed hypothetically rather than rooted in experience.

- Confidence tends to be stronger where suppliers have **greater familiarity with GSCOP, established Retailer relationships, or previous experience of raising issues.**
- Some larger, multi-category suppliers cite having **experienced retaliation** following a complaint but feel unable to prove this due to lack of evidence.
- It's also felt that **adherence to no-retaliation can only be proven over time.** One supplier in a live dispute explains that the *real* test will be whether the Retailer relationship remains unchanged in six months.



Uneven awareness, mixed experiences and perceived risks suggest that commitments alone are not enough. The GCA can help build confidence by clarifying its role, the forms of retaliation they monitor, and demonstrating how protections are applied.

Many are not looking for better promises, but proof that issues are investigated and suppliers are protected

Most already know that rules and commitments exist and want to see evidence of those rules in action, to alleviate worries about Retailers acting outside of them.

Most impactful



Evidence that issues are acted on and resolved

Evidence that suppliers can raise concerns without commercial repercussions (rather than reassurance on no retaliation)

Greater visibility of how often CCOs deal with issues and hold Retailers to account

Clearer explanation of the process

Stronger reassurance on confidentiality alone

Least impactful

Actions for boosting confidence

- Communication that **normalises issue-raising**
- **Greater transparency** around the **volume and type of issues** raised with CCOs and the GCA
- **Stronger reassurance** on **how** anonymity is maintained
- **Proof that reporting is safe** through anonymised case studies
- **Greater visibility** of how issues are handled and **outcomes**

► **Key findings from 2025/2026**

Key findings highlight that a supplier's likelihood to raise a Code issue is heavily contingent on their internal capabilities, and exposure to risk

- 01** | **Underlying power dynamics and commercial dependence are the strongest predictors of willingness to raise Code issues.** The supplier's perceived importance to the Retailer, and the Retailer's perceived importance to the supplier, determine where power sits. This shapes supplier willingness to raise Code issues.
- 02** | **The biggest barrier to raising Code issues is a lack of faith that the process can truly protect suppliers' business interests.** The challenge is no longer convincing suppliers that protections exist but convincing them that those protections work in practice. Seeing greater evidence of issue resolution – without commercial repercussions – would help suppliers overcome this barrier.

- 03** | **Internal supplier culture is an overlooked barrier in issue-raising.** Interviews reveal tension between account managers and senior leadership in escalating Code issues. Some are prohibited to raise issues by senior leadership, while others accept unfair treatment by Retailers, unprepared to put their careers on the line.
- 04** | **Suppliers' strategic positioning and innovation success depend as much on their own capacity to access information as on what Retailers share with them.** Suppliers who invest in strategy news report a clearer picture of their strategic positioning, meaning they are more able to align themselves with Retailer priorities without needing to be told. Those without this capacity are more reliant on ad hoc, inconsistent disclosure from buyers, putting them on the back foot.



Thank you