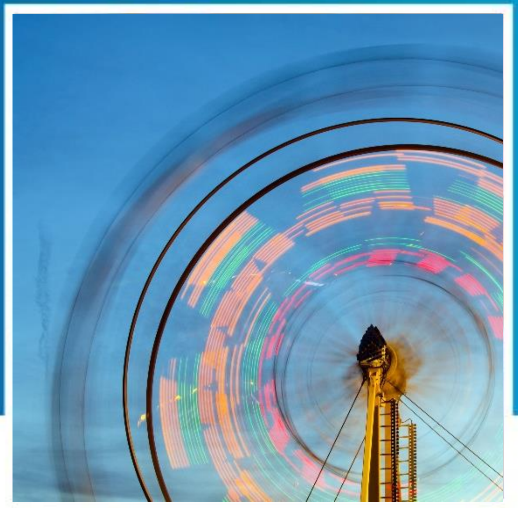
UNIVERSES 2019
GERMANY



Updated: September 2019

Growth delivered.

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Introduction

This Universes 2019 booklet, provided by IRI, is a brief but comprehensive summary covering the most important retail Classes of Trade in the Federal Republic of Germany.

The data reflects the retail landscape in 2018/2019 and forms the basis for the projection of IRI Retail Audit for the current year. The **annual figures in the subsequent charts** are to be interpreted as follows:

Number of stores: as of January 1st of the given year.

Turnover: Gross revenue of the previous year.

Background sources used for the production of this booklet include: updated and projected data, IRI's own retailer research, official statistics, publications by various organizations and associations related to the retail industry as well as data provided to IRI by the retail industry itself.

Total retail food trade – Development incl. Aldi

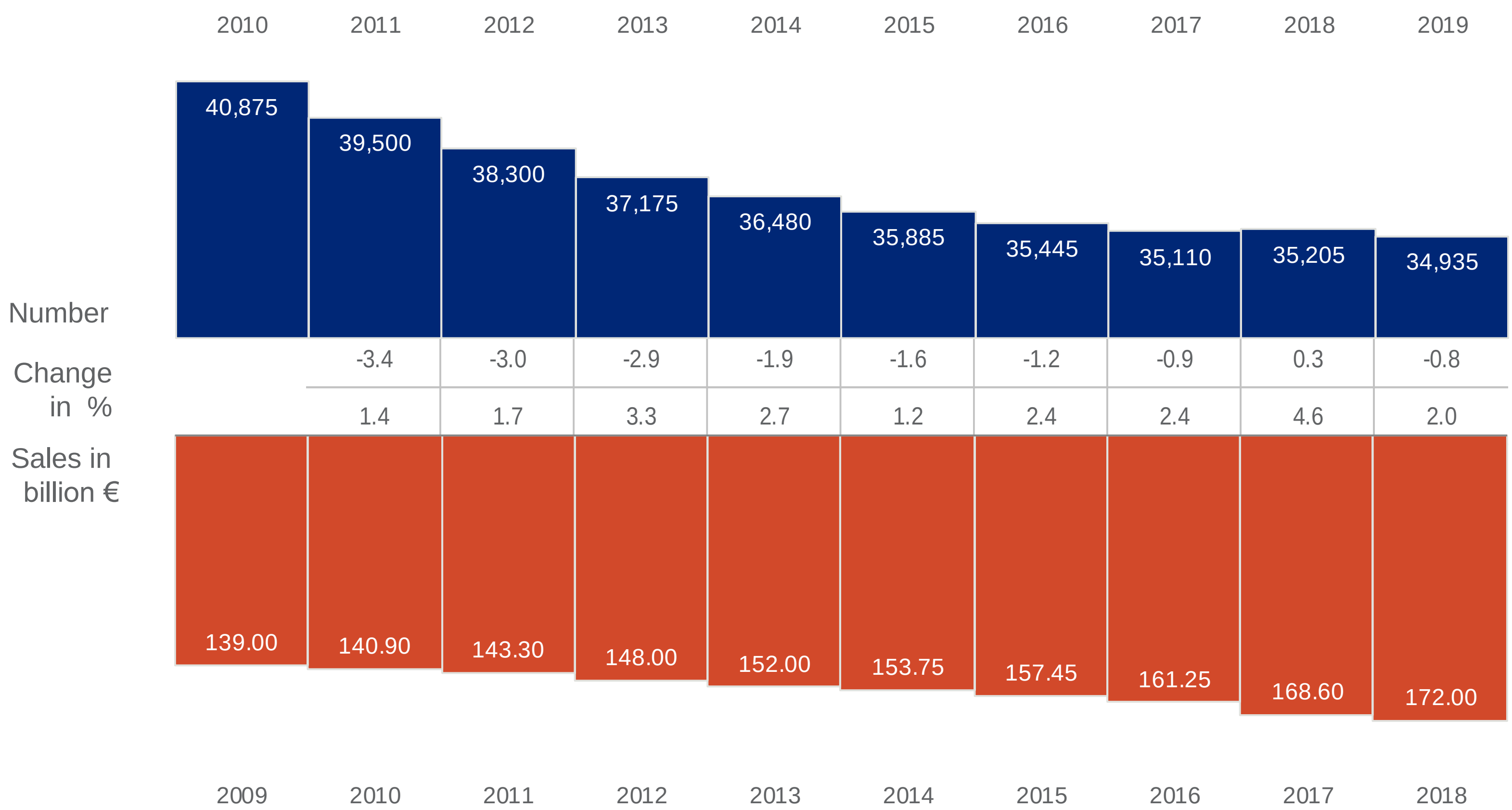
Continued consolidation

Value sales in the grocery class of trade (incl. Aldi) increased by 2.0% to €172.00bn in 2018.

The number of stores in Germany has decreased. The continuing negative trend among smaller traditional grocery stores was also followed by a decrease in the number of discounters, whereas the number of hypermarkets slightly increased. In total the number of stores has decreased by 0.8%. At the end of 2018, Germany had a total of 34,935 grocery stores with Aldi itself ending the year with a total of 4,140 stores nationwide.

As in previous years, the following review of the grocery trade does not include the following classes of trade: Department stores and cash & carry outlets. The hypermarket non-food sales are not included in the stated numbers.

Total retail food trade – incl. Aldi



Store types – Definitions

Hypermarkets

Hypermarkets are self-service retail stores with large surface size (800 sq m and more, as long as they are not discounters) offering groceries as well as consumer durables and consumer goods mostly for short to middle term use. Large hypermarkets, also known as self-service department stores, carry a range similar to that of department stores including groceries and semi-luxuries for short, middle and long term use. In general, hypermarkets have central check-out areas and spacious customer parking lots. They are frequently situated on the outskirts of cities.

Discounters (incl. Aldi)

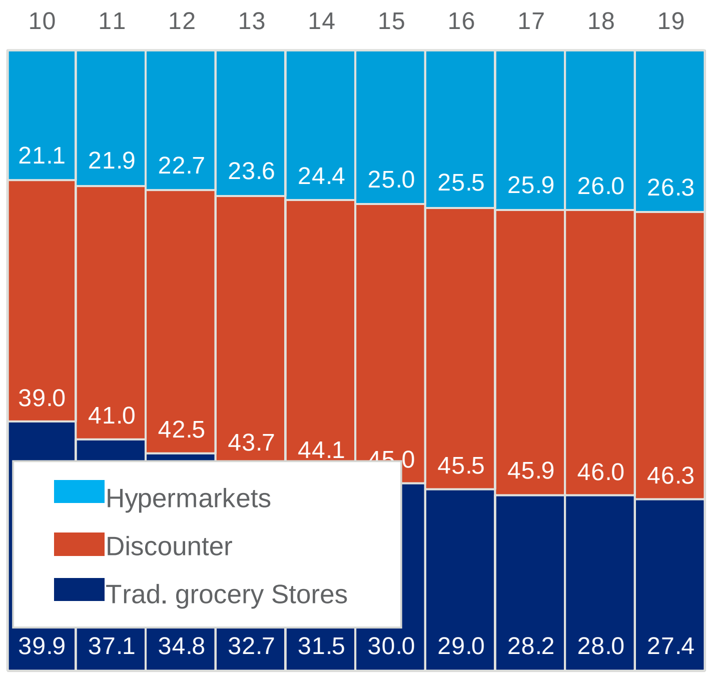
Discounters are self-service stores carrying mainly groceries in a limited range with emphasis on low prices. They have only basic furnishing and central check-outs. The most important representatives of this type of stores are Aldi, Lidl, Netto, Norma, Penny.

Traditional grocery stores

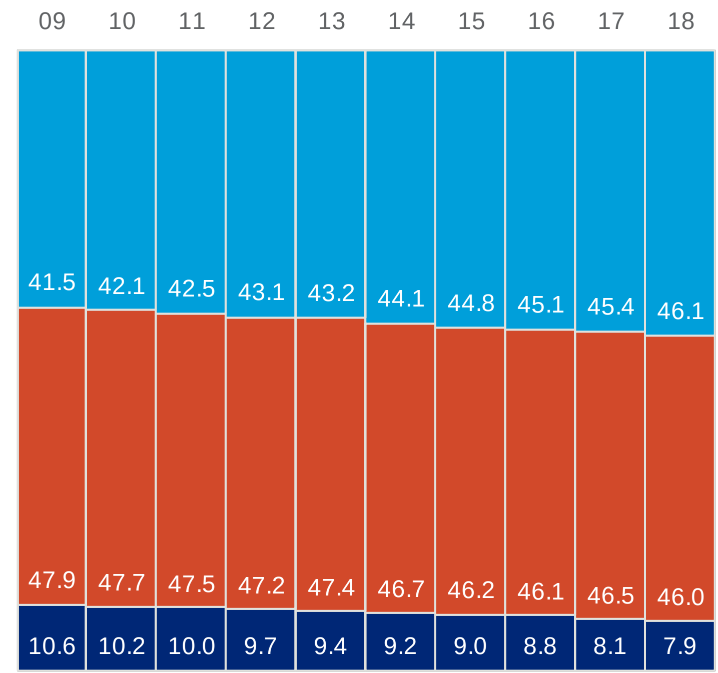
Outlets of the traditional retail food trade are stores with a range of goods consisting mainly of groceries. Stores of this type are neither hypermarkets nor discounters. Specialty shops offering groceries on the side are excluded (e.g. bakeries, confectioneries etc.).

Store types – incl. Aldi

Number of stores in %



Sales share in %



Ret. groc. trade – No.	10	11	12	13	14	15	16	17	18	19
No.	40,875	39,500	38,300	37,170	36,480	35,885	35,445	35,110	35,205	34,935
Change in %		-3.4	-3.0	-2.9	-1.9	-1.6	-1.2	-0.9	0.3	-0.8

Ret. groc. trade – € in bn	09	10	11	12	13	14	15	16	17	18
€ in bn	139.00	140.90	143.30	148.00	152.00	153.75	157.45	161.25	168.60	172.00
Change in %		1.4	1.7	3.3	2.7	1.2	2.4	2.4	4.6	2.0

Hypermarkets – Development

Hypermarkets were among the winners in Total Grocery in 2018 again.

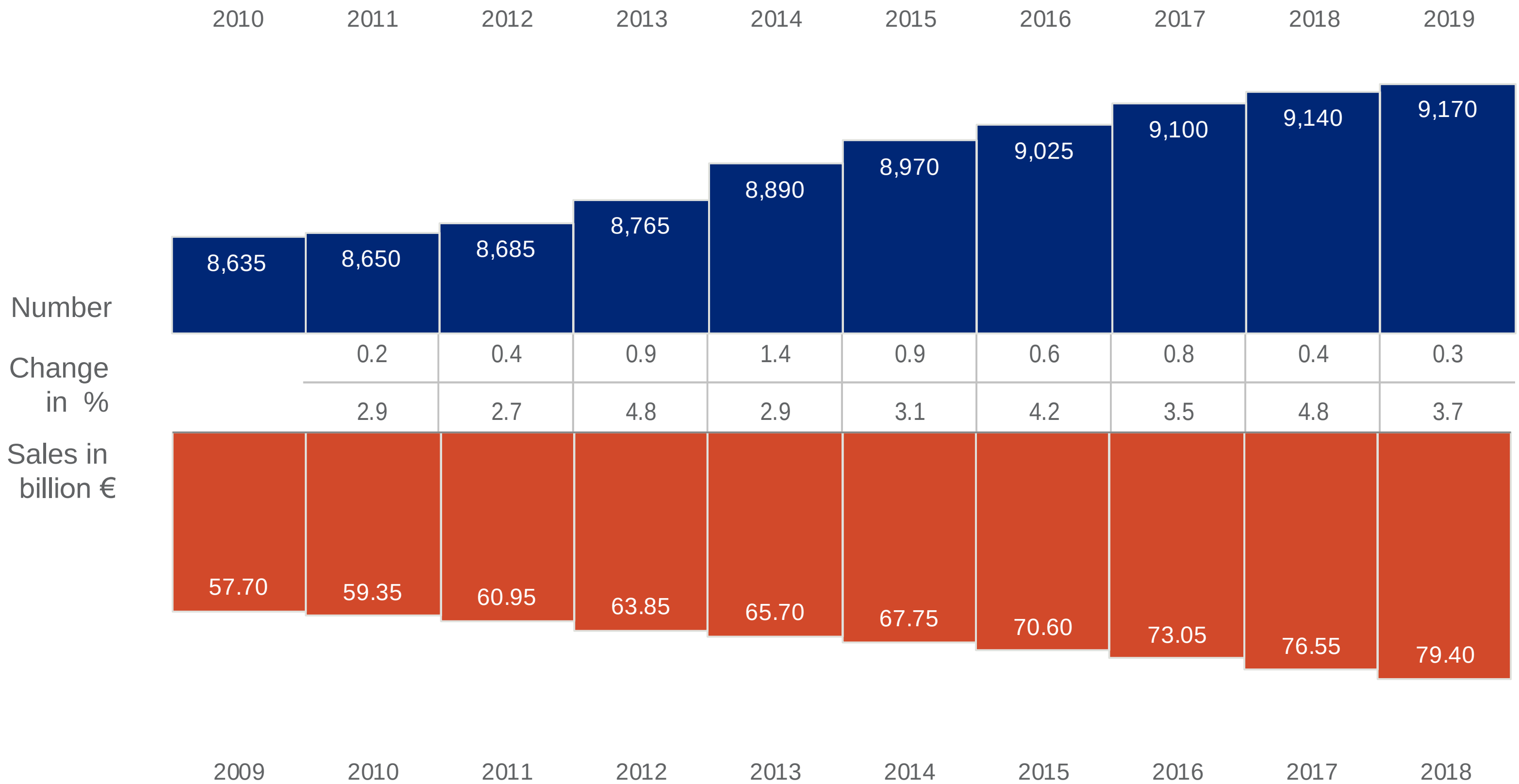
Due to the openings and selling space expansions the number of stores increased to 9,170. Nevertheless, it should be noted that 53.6% of the hypermarkets sales volume is generated by the smaller markets (selling spaces ranging from 800 to 1,499 sq m or from 1,500 to 2,499 sq m), which account for 77.6% of all hypermarkets.

Value sales increased to €79.40bn in 2018; hence the average turnover for hypermarkets slightly increased to €8,5 m as well.

Regional distribution of hypermarkets at the end of 2018, by IRI regions:

• North-West	1,740	(– 0.9%)
• North Rhine-Westphalia	1,815	(– 0.3%)
• Central	1,375	(+ 1.1%)
• South	2,655	(+ 1.1%)
• East	1,585	(+ 0.3%)
• Total:	9,170	(+ 0.3%)

Hypermarkets



Discounters – Development incl. Aldi

Discounters – positive performance in 2018

The decrease of number of stores by 0.2% was accompanied by an increase in value sales by 0.9% to €79.10bn.

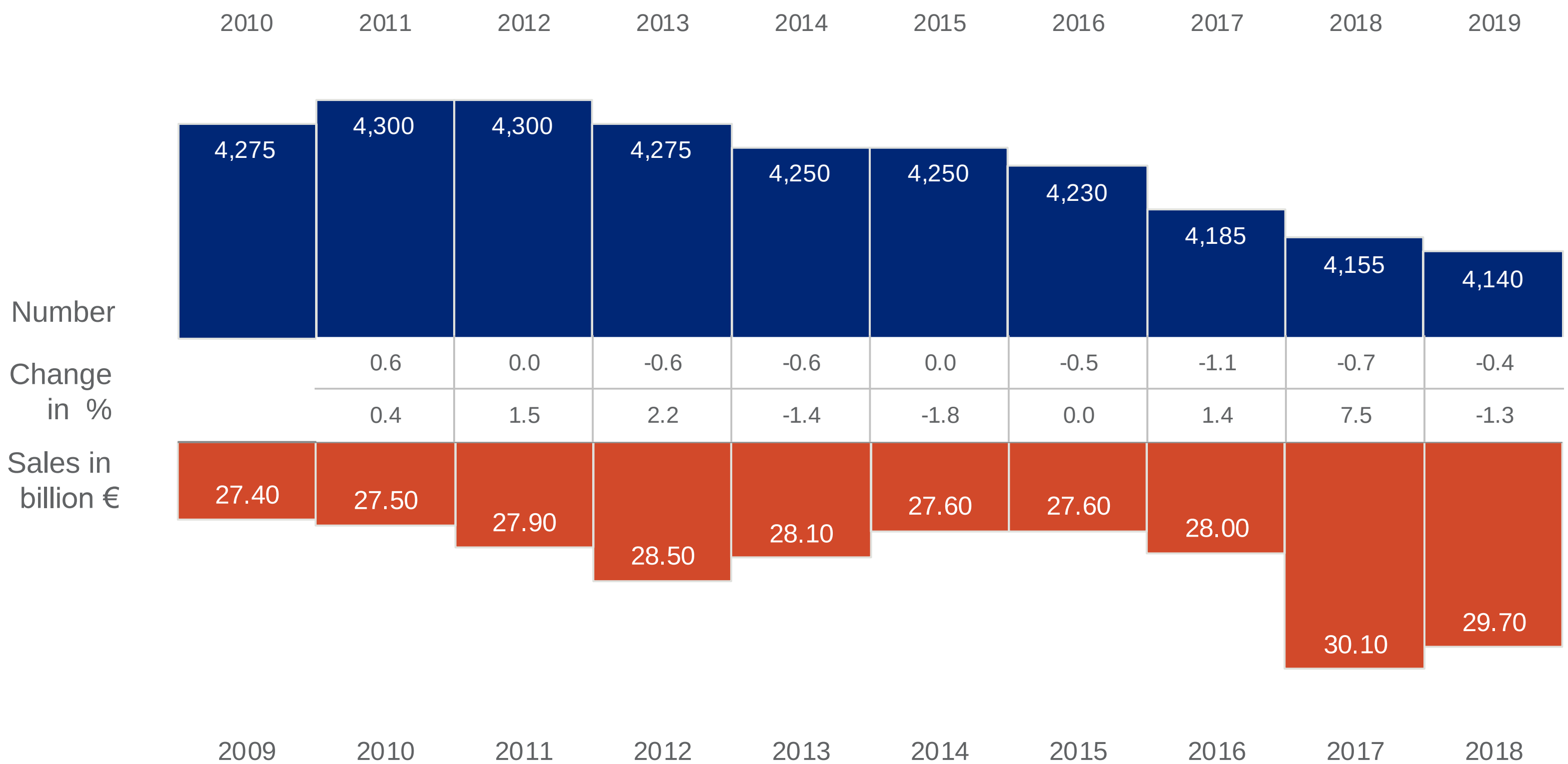
In 2018 this store type represents a value share of 46% of total grocery, which puts discounters even ahead of traditional grocery.

When Aldi is not included, discounters nowadays represent 28.7% of the total grocery value sales in Germany (€172.00bn).

Regional distribution of discounters (incl. Aldi) at the end of 2018, East vs West:

• West	12,030	(– 0.5%)
• East	4,145	(+ 0.4%)
• Total	16,175	(– 0.2%)

Aldi



* co-operation partner GfK: FOOD-Sales exclusively

Discounters – excl. Aldi

Discounters

Company	Name	Discounters incl. Aldi		Discounters excl. Aldi	
		Number 01.01.2019	Sales 2018	Number 01.01.2019	Sales 2018
		16,175	**79.10**	**12,035**	**49.40**
		Share in %		Share in %	
Classic Discounters					
Aldi	Aldi	26	38		
Lidl & Schwarz	Lidl	21	24	28	38
Norma	Norma	8	5	11	9
Brand Name Discounters					
Penny	Penny	13	10	18	17
Netto North/South	Netto	28	21	38	33
Edeka Retailers	Diska, NP, Treff	4	2	5	3

Traditional grocery stores – Development

Number of Outlets and Value Sales continue to decline

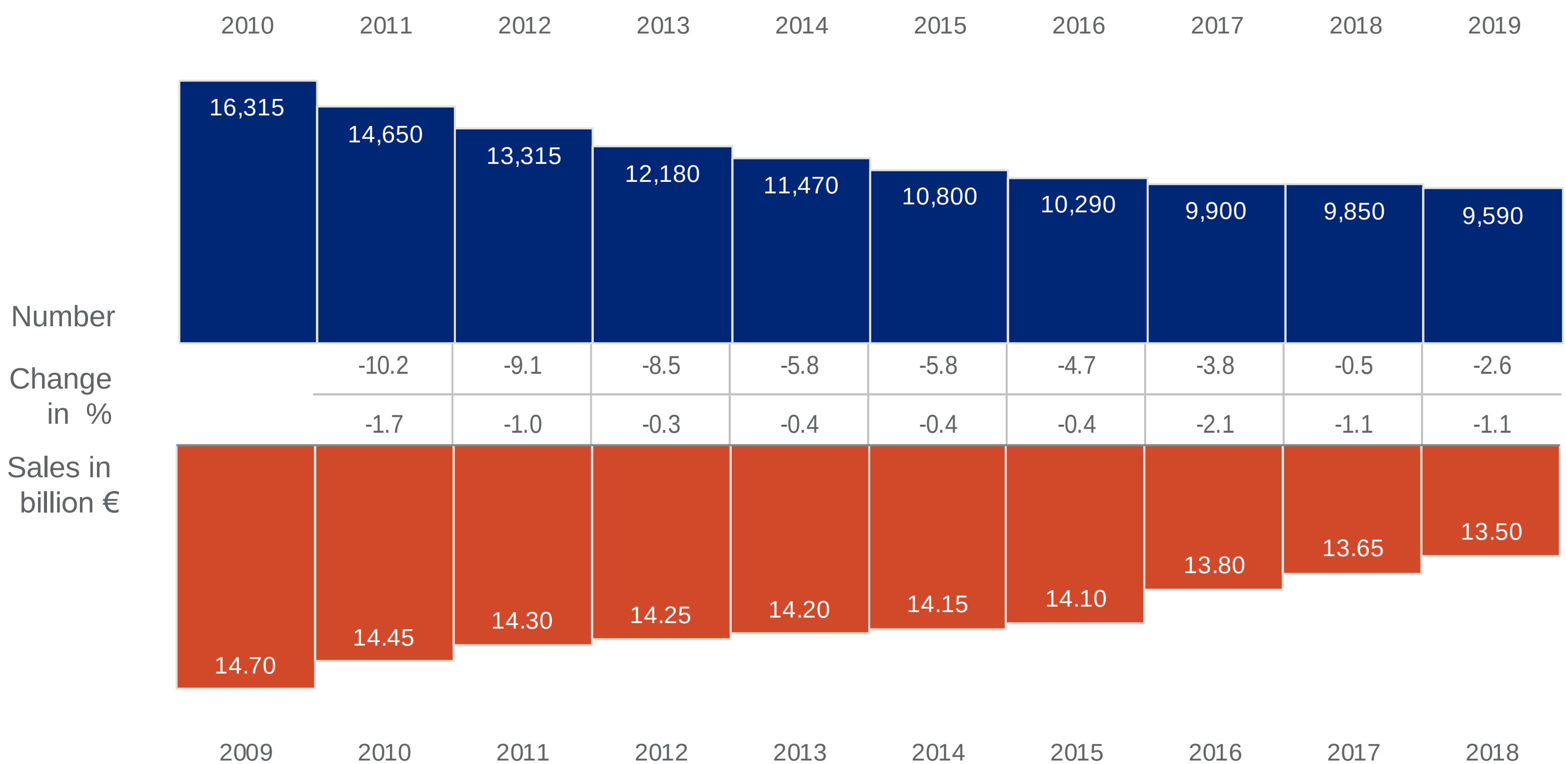
The total number of traditional grocery stores has declined. The number of stores in the largest category (3,665 stores up to 199 sq m) decreased by -5.1 %.

The entire traditional grocery store category again suffered losses in value sales in 2018. Sales fell by 1.1% to €13.50bn. Traditional grocery stores thus account for only 9.5% of total retail grocery sales (excl. Aldi).

Regional distribution of traditional grocery stores at the end of 2018, East vs West:

• West	7,715	(– 2.5%)
• East	1,875	(– 3.1%)
• Total	9,590	(– 2.6%)

Traditional grocery stores



Store types – excl. Drugstores

	Number of stores					Sales in billion				
	01.01.2018		19:18	01.01.2019		2017		18:17	2018	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Hypermarkets	9,140	29.4	0.3	9,170	29.8	76.54	55.2	3.7	79.38	55.8
Discounters	12,060	38.9	-0.2	12,035	39.1	48.32	34.9	2.2	49.40	34.7
Traditional grocery stores	9,850	31.7	-2.6	9,590	31.1	13.65	9.9	-1.0	13.52	9.5
Total	**31,050**	**100.0**	**-0.8**	**30,795**	**100.0**	**138.50**	**100.0**	**2.7**	**142.30**	**100.0**
Aldi	4,155		-0.4	4,140		30.10		-1.3	29.70	

Selling space categories – Development

IRI distinguishes among seven different categories of surface size. In addition, discounters are classified as a separate category regardless of their actual size.

Traditional grocery stores are divided into three categories according to size:

- up to 199 sq m
- 200 to 399 sq m
- 400 to 799 sq m (supermarkets).

The hypermarket segment is divided into markets of:

- 800 to 1,499 sq m
- 1,500 to 2,499 sq m
- 2,500 to 4,999 sq m
- 5,000 sq m or more (self-service department stores).

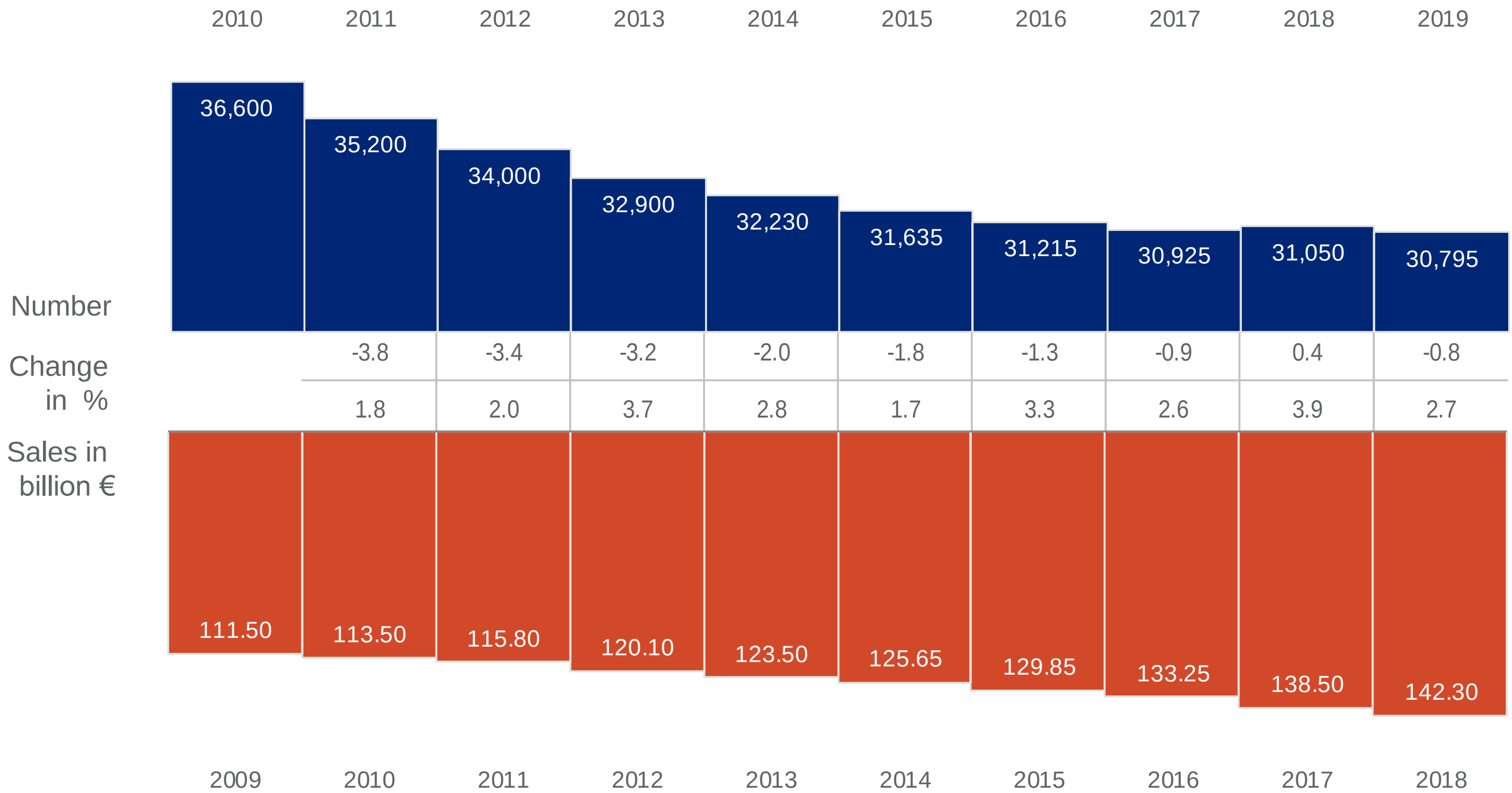
Selling space categories – incl. Aldi

	Number of stores					Sales in billion €				
	01.01.2018		19:18	01.01.2019		2017		18:17	2018	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
up to 199 sq m	3,860	11.0	-5.1	3,665	10.5	1.350	0.8	-2.2	1.320	0.8
200 to 399 sq m	2,780	7.9	-0.4	2,770	7.9	2.700	1.6	-1.9	2.650	1.5
400 to 799 sq m	3,210	9.1	-1.7	3,155	9.0	9.600	5.7	-0.5	9.550	5.6
800 to 1499 sq m	4,270	12.1	-0.9	4,230	12.1	21.600	12.8	3.5	22.350	13.0
1500 to 2499 sq m	2,830	8.0	2.1	2,890	8.3	19.350	11.5	4.3	20.180	11.7
2500 to 4999 sq m	1,370	3.9	1.5	1,390	4.0	17.085	10.1	3.9	17.750	10.3
5000 s qm or more	670	1.9	-1.5	660	1.9	18.500	11.0	3.2	19.100	11.1
Discounters excl. Aldi	12,060	34.3	-0.2	12,035	34.4	48.315	28.6	2.2	49.400	28.7
Aldi	4,155	11.8	-0.4	4,140	11.9	30.100	17.9	-1.3	29.700	17.3
Total	**35,205**	**100.0**	**-0.8**	**34,935**	**100.0**	**168.600**	**100.0**	**2.0**	**172.000**	**100.0**

Selling space categories – excl. Aldi

	Number of stores					Sales in billion €				
	01.01.2018		19:18	01.01.2019		2017		18:17	2018	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
up to 199 sq m	3,860	12.4	-5.1	3,665	12.0	1.360	1.0	-2.9	1.320	0.9
200 to 399 sq m	2,780	9.0	-0.4	2,770	9.0	2.700	1.9	-1.9	2.650	1.9
400 to 799 sq m	3,210	10.3	-1.7	3,155	10.2	9.600	6.9	-0.5	9.550	6.7
800 to 1499 sq m	4,270	13.8	-0.9	4,230	13.7	21.600	15.6	3.5	22.350	15.7
1500 to 2499 sq m	2,830	9.1	2.1	2,890	9.4	19.350	14.0	4.3	20.180	14.2
2500 to 4999 sq m	1,370	4.4	1.5	1,390	4.5	17.085	12.3	3.9	17.750	12.5
5000 s qm or more	670	2.2	-1.5	660	2.1	18.500	13.4	3.2	19.100	13.4
Discounters excl. Aldi	12,060	38.8	-0.2	12,035	39.1	48.315	34.9	2.2	49.400	34.7
Total	**31,050**	**100.0**	**-0.8**	**30,795**	**100.0**	**138.510**	**100.0**	**2.7**	**142.300**	**100.0**

Total retail food trade – excl. Aldi

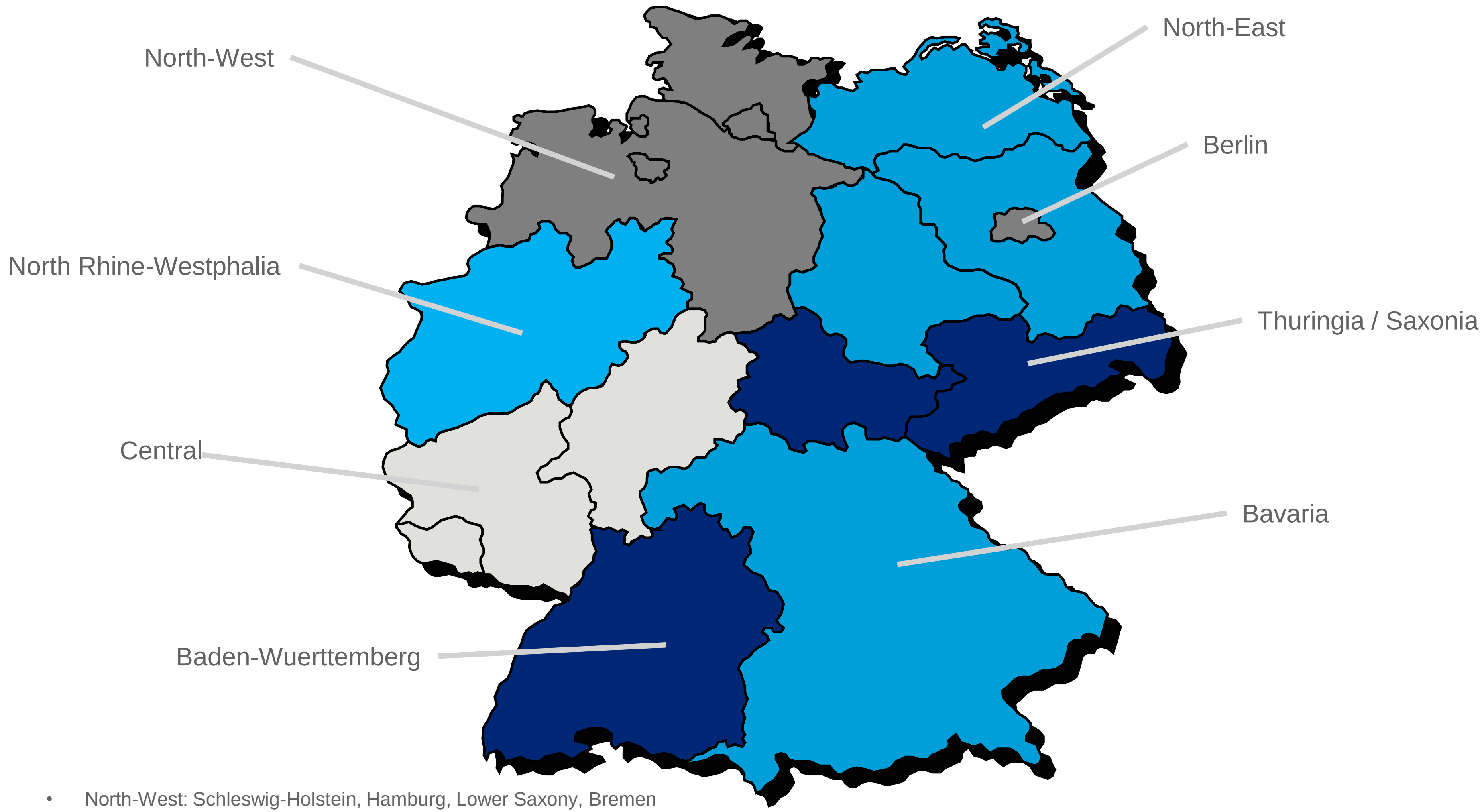


Regions – excl. Aldi

	Number of stores					Sales in billion €				
	01.01.2018		19:18	01.01.2019		2017		18:17	2018	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
North-West	4,965	16.0	-1.1	4,910	15.9	24.240	17.5	2.7	24.905	17.5
North Rhine-Westphalia	5,890	19.0	-0.4	5,865	19.0	28.660	20.7	2.7	29.445	20.7
Central	4,380	14.1	-0.8	4,345	14.1	18.830	13.6	2.7	19.345	13.6
Baden-Wuerttemberg	3,750	12.1	-2.5	3,655	11.9	18.150	13.1	2.7	18.645	13.1
Bavaria	5,200	16.7	-0.1	5,195	16.9	19.400	14.0	2.7	19.930	14.0
North-East	3,085	9.9	-0.5	3,070	10.0	12.180	8.8	2.8	12.515	8.8
Thuringia/Saxony	2,955	9.5	-0.7	2,935	9.5	11.350	8.2	2.7	11.660	8.2
Berlin	825	2.7	-0.6	820	2.7	5.700	4.1	2.7	5.855	4.1
Total Germany	**31,050**	**100.0**	**-0.8**	**30,795**	**100.0**	**138.510**	**100.0**	**2.7**	**142.300**	**100.0**

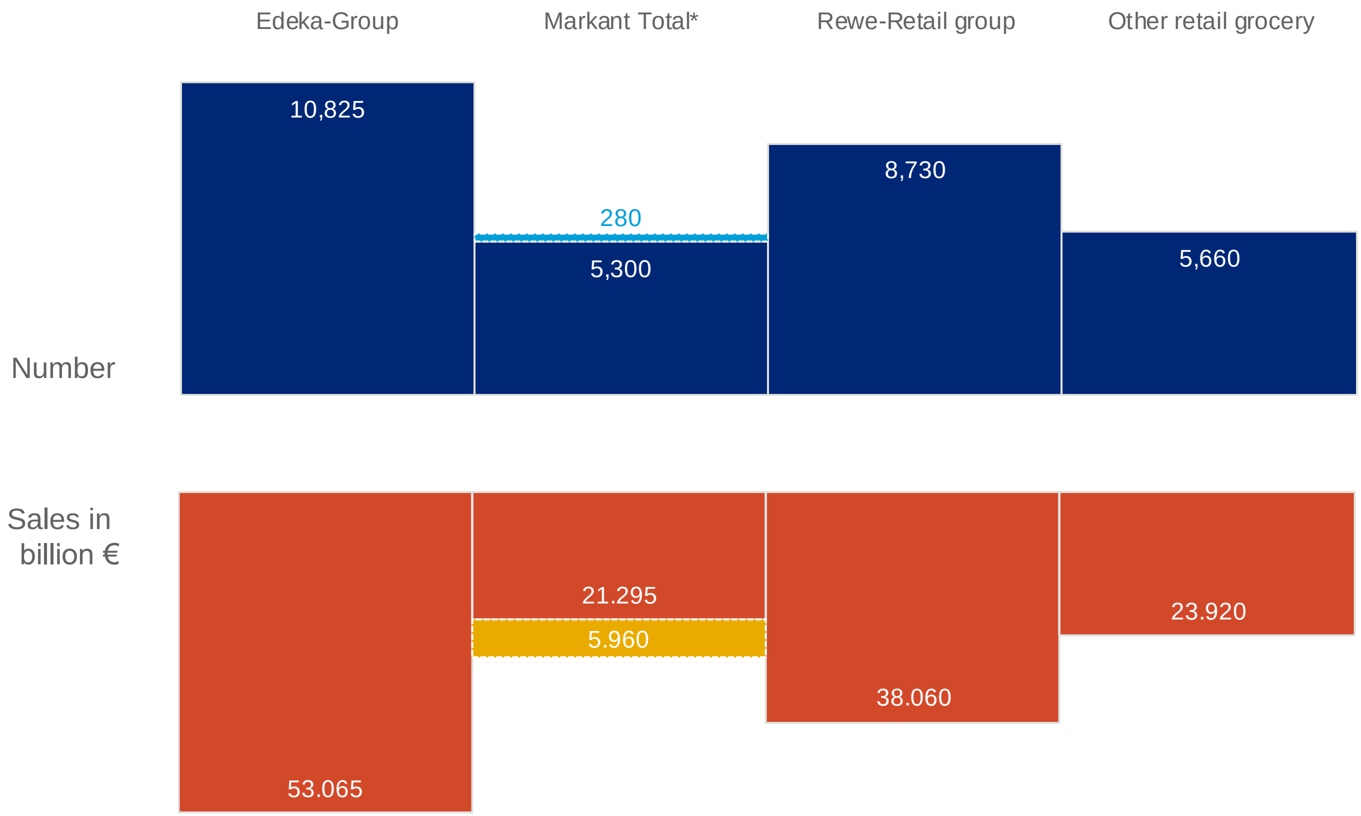
- North-West: Schleswig-Holstein, Hamburg, Lower Saxony, Bremen
- Central: Hesse, Rhineland-Palatinate, Saarland
- North-East: Mecklenburg-Western Pomerania, Brandenburg, Saxony-Anhalt

Regions



- North-West: Schleswig-Holstein, Hamburg, Lower Saxony, Bremen
- Central: Hesse, Rhineland-Palatinate, Saarland
- North-East: Mecklenburg-Western Pomerania, Brandenburg, Saxony-Anhalt

Key-Accounts – excl. Aldi, drugstores



* consists of Markant ex. real,- and 280 real,- sales outlets with value sales of €5.960 bn.

Key-Accounts – excl. Aldi, drugstores

Average sales per store in million €	2018
Edeka-Group	4.90
• Retailers	6.10
• Edeka Discounters/Cooperations	3.41
Markant Total	4.88
• Markant ex. real,-	4.02
• real,- (formerly Metro Einzelhandel)	21.29
Rewe Retail Group	4.36
Other retail grocery	4.23
Total	**4.62**

Key-Accounts – excl. Aldi, drugstores

	Number of stores		Sales in billion €		Number of stores > 200 m²		Sales in billion €	
	01.01.2019		2018		01.01.2019		2018	
	abs.	%	billion €	%	abs.	%	billion €	%
Edeka-Group	10,825	35.1	53.065	37.3	9,305	34.2	52.420	37.1
• Retailers	6,010	19.5	36.660	25.8	4,490	16.5	36.015	25.5
• Affiliated companies/Coop.	4,815	15.6	16.405	11.5	4,815	17.7	16.405	11.6
Markant Total	5,580	18.1	27.255	19.2	4,225	15.5	26.795	19.0
• Markant ex. real,-	5,300	17.2	21.295	15.0	3,945	14.5	20.835	14.8
• real,- (formerly Metro Einzelhandel)	280	0.9	5.960	4.2	280	1.0	5.960	4.2
Rewe Retail Group	8,730	28.4	38.060	26.7	8,230	30.5	37.900	27.0
Other retail grocery	5,660	18.4	23.920	16.8	5,370	19.8	23.865	16.9
Total	**30,795**	**100.0**	**142.300**	**100.0**	**27,130**	**100.0**	**140.980**	**100.0**

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Key-Accounts – excl. Aldi, incl. drugstores

	Number of stores		Sales in billion €		Number of stores > 200 m²		Sales in billion €	
	01.01.2019		2018		01.01.2019		2018	
	abs.	%	billion €	%	abs.	%	billion €	%
Edeka-Group	11,010	30.8	53.555	33.6	9,490	29.7	52.910	33.5
• Retailers	6,010	16.8	36.660	23.0	4,490	14.1	36.015	22.8
• Affiliated companies/Coop.	5,000	14.0	16.895	10.6	5,000	15.6	16.895	10.7
Markant Total	10,250	28.8	43.885	27.5	8,895	27.8	43.425	27.5
• Markant ex. real,-	9,970	28.0	37.925	23.8	8,615	26.9	37.465	23.7
• real,- (formerly Metro Einzelhandel)	280	0.8	5.960	3.7	280	0.9	5.960	3.8
Rewe Retail Group	8,730	24.5	38.060	23.9	8,230	25.7	37.900	23.9
Other retail grocery	5,660	15.9	23.920	15.0	5,370	16.8	23.865	15.1
Total	**35,650**	**100.0**	**159.420**	**100.0**	**31,985**	**100.0**	**158.100**	**100.0**
of which drugstores	4,855		17.120		4,855		17.120	

Edeka Group – Definition and development

Definition

Stores with a product range consisting mainly of food that are members of an Edeka cooperative or pass to account through the Edeka purchasing office.

Overall development

The Edeka Group in its entirety (Edeka Retailers, Edeka Affiliates/Cooperations) continues to rank first by a wide margin in the German retail food trade. The group‘s share of value sales is 37.3%.

Development of Edeka Retailers

Edeka Retailers are split into 7 Edeka commercial companies (German abbreviation: EHG). The respective wholesale companies have merged. In this booklet Edeka Denmark and ADEG are integrated into these companies only for the sake of completeness.

With 6,010 grocery stores, Edeka retains its position as the second largest key-account group after the Rewe Group. Edeka tops the grocery class of trade with sales of €36.660bn and shows a share of 25.8%.

Edeka Group – Definition and development

Development of Edeka Affiliates and Cooperations

Frey and Kissel, Netto South, as well as the discounters of the 7 Edeka companies are summarized in this key account group.

They add up to 4,815 stores representing value sales of €16.405bn.

Edeka Group – Organizational Classification

Company	Headquarters	Company	Headquarters
a) EHG Nord / Danmark		**e) EHG Südwest**	
Edeka Nord (Edeka Danmark)	Neumünster	Edeka Südwest	Offenburg
b) EHG Minden-Hannover		**f) EHG Nordbayern-Sachsen-Thüringen**	
Edeka Minden-Hannover	Minden	Edeka Nordbayern	Rottendorf
c) EHG Hessenring		**g) EHG Südbayern / ADEG**	
Edeka Hessenring	Melsungen	Edeka Südbayern Feneberg (ADEG)	Gaimersheim Kempten
d) EHG Rhein-Ruhr			
Edeka Rhein-Ruhr	Moers		

Edeka Group – Sales channels

Type	Sales channels
Hypermarkets	E-aktiv Markt E-Center E-Center Herkules Edeka E-Neukauf E-Reichelt Kaufmarkt Kupsch Marktkauf
Discounters	-

Type	Sales channels
Trad. Grocery Stores	E-aktiv Markt Edeka E-neukauf Feneberg Kupsch Lüning Nah & Gut

Edeka Group – Organizational Classification and Sales channels

Company	Headquarters	Type	Sales channels
h) Edeka Disc./Coop.		Hypermarkets	SBK
Frey & Kissel	Landau		
Netto Markendiscount	Maxhütte	Discounters	Netto
Diska	Rottendorf		Diska
NP	Minden		NP
Treff	Offenburg		Treff
		Drugstores	Budnikowsky

Markant – Definition and development

Definition

Stores with a range of mostly grocery products as well as drugstores making their purchases through the Markant accounting office.

Development

The key account group Markant consists of 5,580 retail food stores, which attained sales of €27.255bn. With those figures Markant is the third largest key account group in terms of sales after Edeka and Rewe.

Starting from 2016 charges Metro via Markant. This reorganization will be considered further.

With 280 sales outlets, former Metro Retailers account for sales of €5.960bn.

Markant – Organizational Classification

Company	Headquarters	Company	Headquarters
Bartels-Langness	Kiel	Klaas & Kock	Gronau
Bünting	Leer	LHG Eibelstadt	Eibelstadt
Cames	Neuss	Lupus	Pforzheim
Citti	Kiel	Müller	Ulm
dm Werner	Karlsruhe	Netto Supermarkt	Stavenhagen
Giehl	Nistertal	Okle	Singen
Globus	St. Wendel	Real	Mönchengladbach
Jibi	Bielefeld	Rossmann	Burgwedel
Kaes	Mauerstetten	Tegut	Fulda
Kaufland	Neckarsulm	Utz	Ochsenhausen

Markant – Sales Channels

Type	Sales channels	Type	Sales channels	Type	Sales channels
Hypermarkets	Citti	Discounters	Netto Supermarkt	Trad. Grocery Stores	Cames
	Coma				Ihre Kette
	Combi	Drugstores	dm		K+K Markt
	Famila		Kloppenburg		Markant
	Globus		Müller		Tegut
	Handelshof		Rossman		Um's Eck
	Jibi Markt				
	Kaufland				
	K+K Markt				
	Markant				
	Real				
	Tegut				
	V-Markt				

Rewe Retail Group – Definition and development

Definition

Stores with a range consisting primarily of grocery products as well as drugstores operated and supplied by Rewe Zentral AG or other Rewe central offices.

Development

The Rewe Retail Group is the second largest group within the German Retail Food Trade after Edeka Group. Last year 8,730 outlet stores generated a sales volume of €38.060bn. This results in a share of 26.7% of the total retail food sales.

Since 2014 the former Toom SB warehouses are integrated as REWE Center into the Rewe Regions.

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Rewe Retail Group – Organizational classification and sales channels

Company	Headquarters	Type	Sales channels	Type	Sales channels
Brücken	Hagen	Hypermarkets	Hit	Discounters	Penny
Coop*	Kiel		Kaufpark		
Dohle	Siegburg		Rewe	Trad. Grocery Stores	Rewe
Penny	Cologne		Rewe Center		Nahkauf
Petz	Wissen		Wasgau		
Rewe Dortmund	Dortmund				
Rewe Zentrale	Cologne			Drugstores	—
Wasgau	Pirmasens				

* As from 2018: Acquisition of Coop/Sky by Rewe

Other retail grocery stores – Definition and development

Definition

All other stores with a product range consisting mainly of groceries and not belonging to any of the key account groups described above.

Development

The number of stores decreased slightly by 0.4%, whereas sales value increased by 3.0% compared to the previous year.

At present the group consisting of other retail grocery stores comprises approximately 18.4% of all retail food stores. With sales of €23.920bn they account for 16.8% of total retail grocery sales.

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Other retail grocery stores – Organizational classification and sales channels

Company	Headquarters
KG Königs Wusterhausen	Königs Wusterhausen
KG Leipzig	Leipzig
KGV Magdeburg	Magdeburg
Konsum Altenburg	Altenburg
Konsum Dresden	Dresden
Lidl Discount	Neckarsulm
Norma	Nuremberg
Other (not affiliated)	

Type	Sales channels
Hypermarkets	AEZ
	Konsum Frische-Markt
	NEZ
Discounters	Lidl
	Norma
Trad. Grocery Stores	Konsum
	NEZ
Drugstores	—

Drugstores/Perfumeries and specialized retailers – Definitions

Drugstores/Perfumeries and Specialized Retailers: In this group are the traditional specialty trade, drugstores, and the drugstore and perfume departments of department stores.

Traditional Specialty Trade: The traditional specialty trade covers specialty perfumeries.

Specialty Perfumeries: Affiliated or non-affiliated stores with sales almost exclusively from the depot cosmetics area offering a marginal range of other products.

Discount Drugstores: Retail outlets carrying drugs and cosmetics as their core product range. As a rule, these stores operate on the discounter principle (limited, relatively low-price range), offering an easily handled fast-moving brand-name product range on a self-service basis.

Drugstore and Perfumery Departments in Department Stores: Specialty perfumery and drugstore departments at Karstadt and Kaufhof.

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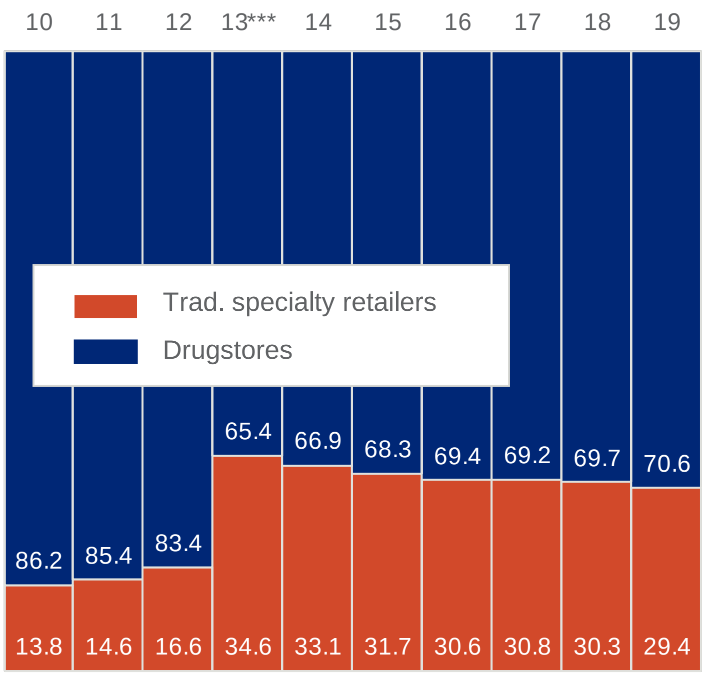
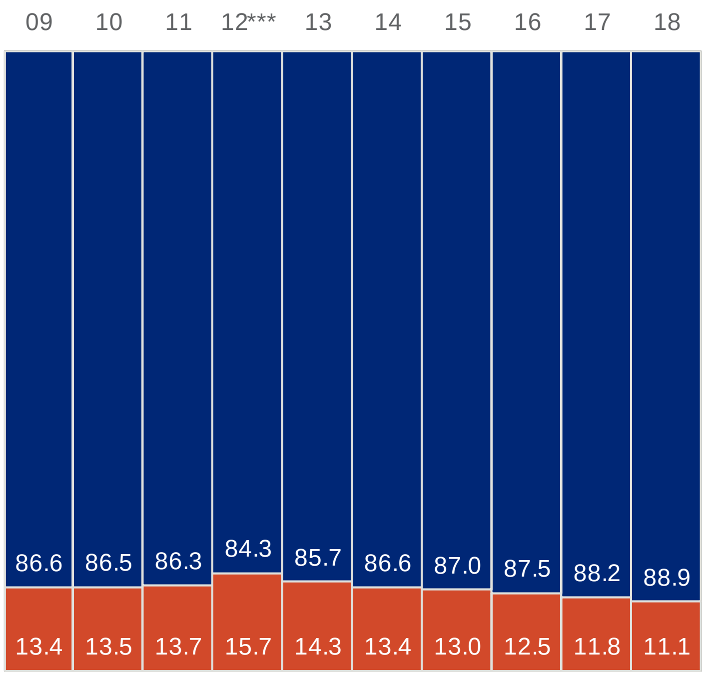
Drugstores/Perfumeries and specialized retailers* – excl. Chain Department Stores





Ret. groc. trade										
Number of stores: Year	10	11	12	13***	14	15	16	17	18	19
No.	15,015	14,045	12,290	5,890	6,005	6,245	6,450	6,700	6,760	6,880
Change in %		-6.5	-12.5	-52.1	2.0	4.0	3.3	3.8	0.9	1.8

Ret. groc. trade										
Sales: Year	09	10	11	12***	13	14	15	16	17	18
€ in bn	15.14	15.26	15.64	13.94	15.29	16.35	17.41	18.24	18.80	19.32
Change in %		0.8	2.5	-10.8	9.9	6.9	6.5	4.8	3.1	2.8

* since 01.01.2009 excl. specialty drugstores ** contains also online sales share *** Insolvency of Schlecker

Drugstores/Perfumeries and specialized retailers – Development

The Drug and Specialty Perfumery (since 01.01.2009 excl. specialty drugstores) sectors increased in value sales by 2.7% to €19.91bn versus year ago.

The number of discount drugstores increased by 140 stores to a total of 4,855 stores.

The discount drugstores increased their share of total drug and specialty perfumery (excl. department stores, since 01.01.2009 excl. specialty drugstores) to 70.6% (previous year: 69.7%), and at same time increased their value share to 88.6% (previous year: 88.2%).

Regional distribution of drugstores and specialty perfumeries (excl. chain department stores), by IRI regions:

• North-West	1,270
• North Rhine-Westphalia	1,555
• Central	930
• Baden-Wuerttemberg	880
• Bavaria	1,110
• North-East	460
• Thuringia/Saxonia	405
• Berlin	270
• Total	6,880

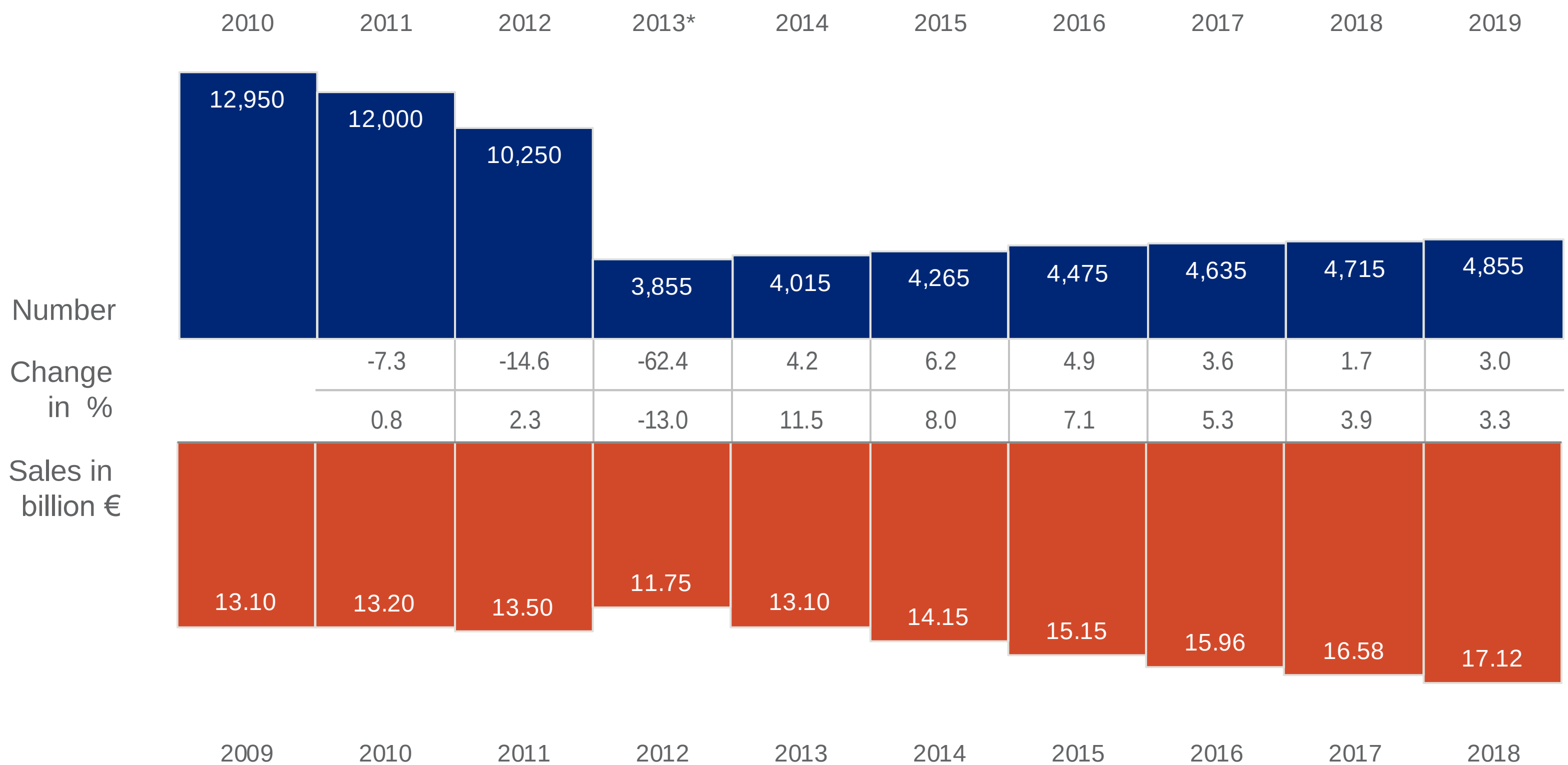
Drugstores/Perfumeries and specialized retailers

	Number of stores					Sales in billion €				
	01.01.2018		19:18	01.01.2019		2017		18:17	2018	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Spec. Perfumeries	2,045	29.5	-1.0	2,025	28.7	2.220	11.5	-0.9	2.200	11.1
Chain Department stores	175	2.5	0.0	175	2.5	0.590	3.0	-0.8	0.585	2.9
Drugstores	4,715	68.0	3.0	4,855	68.8	16.580	85.5	3.3	17.120	86.0
Total	**6,935**	**100.0**	**1.7**	**7,055**	**100.0**	**19.390**	**100.0**	**2.7**	**19.905**	**100.0**

Drugstores

	Number 01.01.2019	Sales 2018
	4,855	€17,12bn
	Shares in %	
dm	41	47
Rossmann (incl. Kloppenburg)	44	38
Müller	11	12
Budnikowsky	4	3

Drugstores

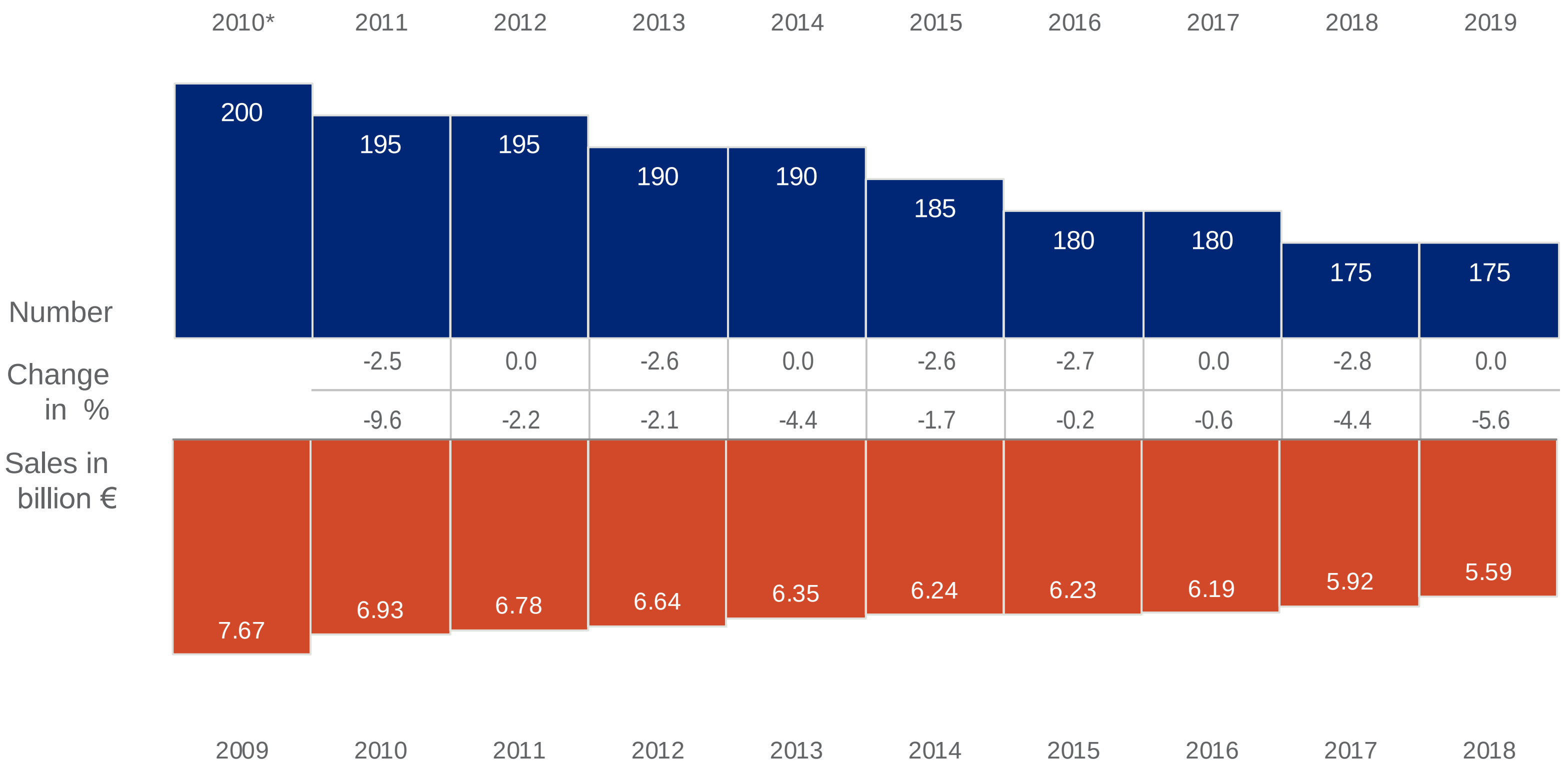


* Insolvency of Schlecker

Store types – Total retail food trade and drugstores

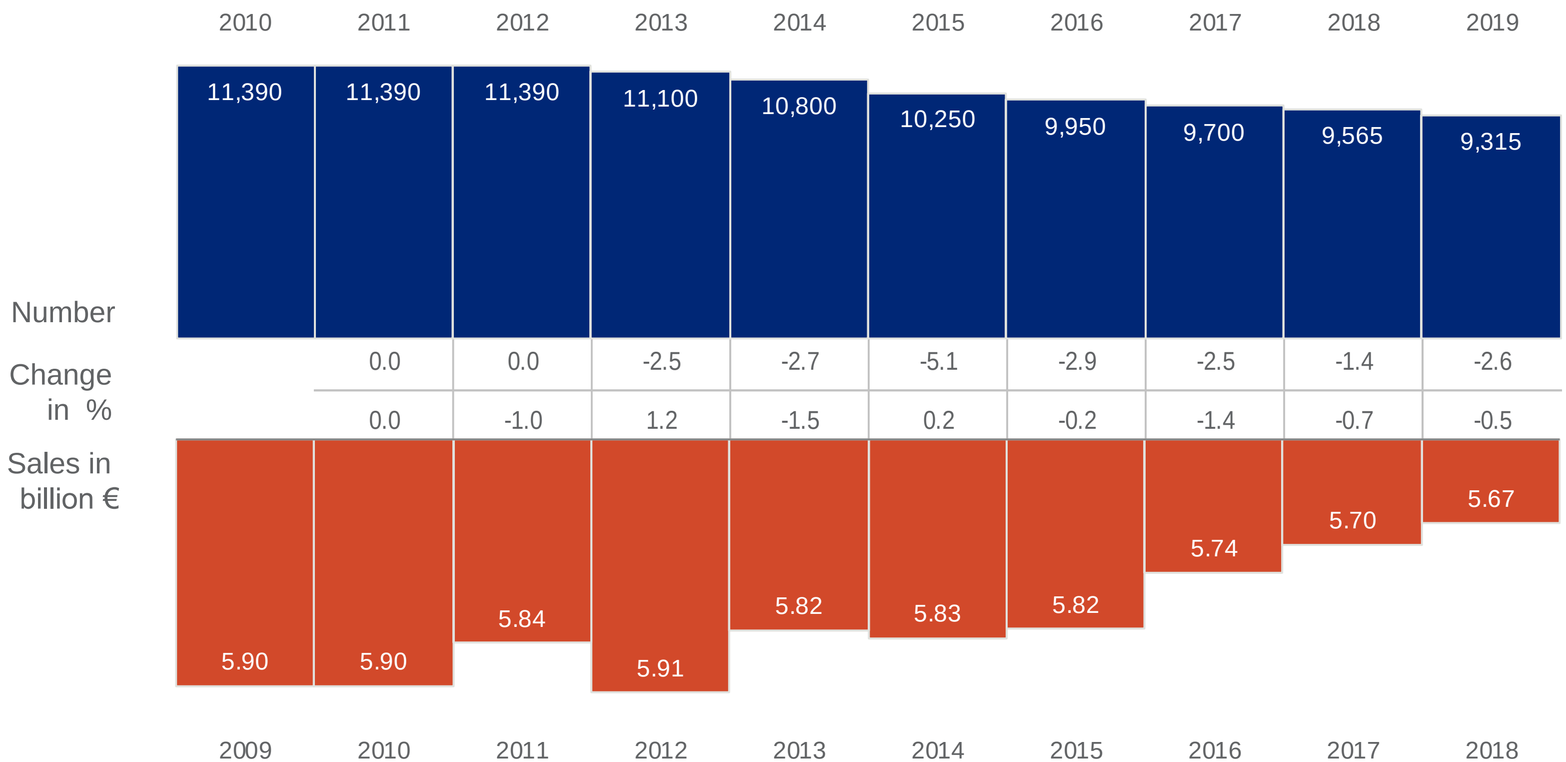
	Number of stores					Sales in billion				
	01.01.2018		19:18	01.01.2019		2017		18:17	2018	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Hypermarkets	9,140	22.9	0.3	9,170	23.0	76.54	41.3	3.7	79.38	42.0
Discounters	12,060	30.2	-0.2	12,035	30.2	48.32	26.1	2.2	49.40	26.1
Trad. grocery stores	9,850	24.7	-2.6	9,590	24.1	13.65	7.4	-1.0	13.52	7.1
Aldi	4,155	10.4	-0.4	4,140	10.4	30.10	16.2	-1.3	29.70	15.7
Drugstores	4,715	11.8	3.0	4,855	12.3	16.58	9.0	3.3	17.12	9.1
Total	**39,920**	**100.0**	**-0.3**	**39,790**	**100.0**	**185.18**	**100.0**	**2.1**	**189.12**	**100.0**

Department stores



* as from 2010: excl. Hertie (Karstadt Kompakt) due to insolvency

Beverage specialty stores*



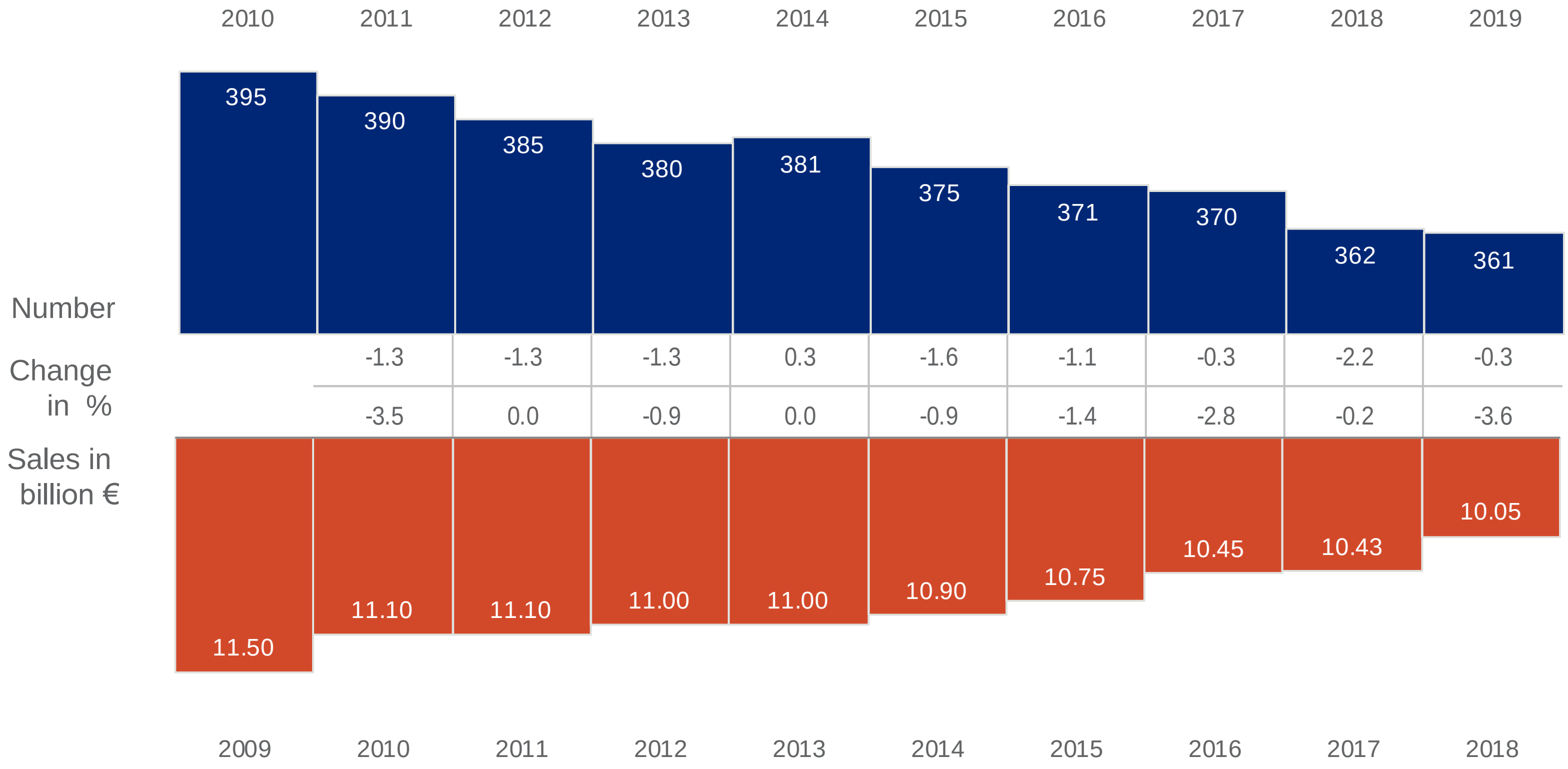
* Sales: Beer and Nonalcoholic beverages product categories

Beverage specialty stores – Regions

	Number of stores				
	01.01.2018		19:18	01.01.2019	
	abs.	%	%	abs.	%
North-West	925	9.7	-2.2	905	9.7
North Rhine-Westphalia	1,880	19.7	-2.7	1,830	19.7
Central	1,255	13.1	-2.8	1,220	13.1
Baden-Wuerttemberg	1,180	12.3	-2.5	1,150	12.4
Bavaria	2,065	21.6	-2.4	2,015	21.6
North-East	855	8.9	-2.9	830	8.9
Thuringia/Saxony	1,230	12.9	-2.8	1,195	12.8
Berlin	175	1.8	-2.9	170	1.8
Total Germany	**9,565**	**100.0**	**-2.6**	**9,315**	**100.0**

- North-West: Schleswig-Holstein, Hamburg, Lower Saxony, Bremen
- Central: Hesse, Rhineland-Palatinate, Saarland
- North-East: Mecklenburg-Western Pomerania, Brandenburg, Saxony-Anhalt

C&C Outlets


2010
2011
2012
2013
2014
2015
2016
2017
2018
2019
Number
395
390
385
380
381
375
371
370
362
361
Change in %
-1.3
-1.3
-1.3
0.3
-1.6
-1.1
-0.3
-2.2
-0.3
-3.5
0.0
-0.9
0.0
-0.9
-1.4
-2.8
-0.2
-3.6
Sales in billion €
11.50
11.10
11.10
11.00
11.00
10.90
10.75
10.45
10.43
10.05
2009
2010
2011
2012
2013
2014
2015
2016
2017
2018

Total market

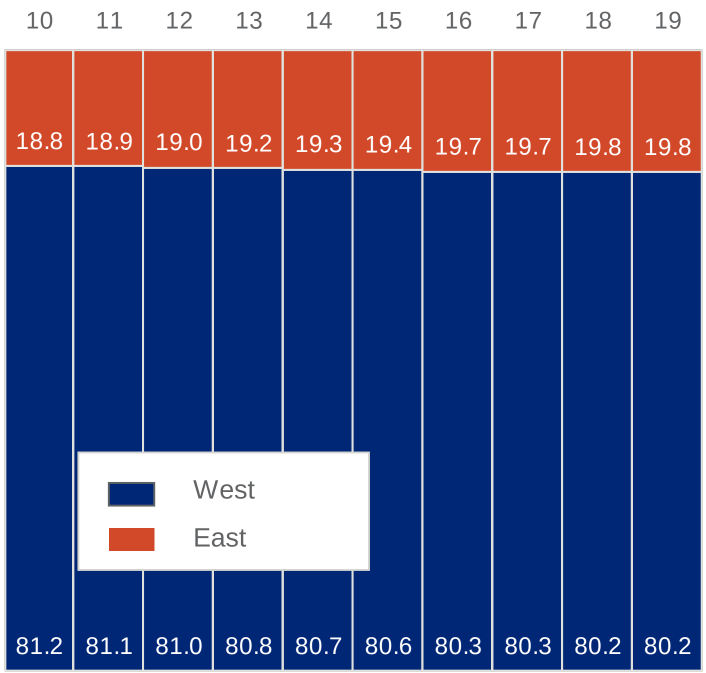
	Number of stores					Sales in billion €				
	01.01.2018		19:18	01.01.2019		2017		18:17	2018	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Hypermarkets	9,140	17.6	0.3	9,170	17.7	76.535	37.8	3.7	79.380	38.5
Discounters	12,060	23.2	-0.2	12,035	23.4	48.315	23.8	2.2	49.400	23.9
Aldi	4,155	8.0	-0.4	4,140	8.0	30.100	14.8	-1.3	29.700	14.4
Trad. grocery stores	9,850	18.9	-2.6	9,590	18.6	13.650	6.7	-1.0	13.520	6.6
Drugstores/Perfumeries*	6,760	13.0	1.8	6,880	13.3	18.800	9.3	2.8	19.320	9.4
Chain department stores**	175	0.3	0.0	175	0.3	1.810	0.9	-4.7	1.725	0.8
Beverage speciality stores	9,565	18.3	-2.6	9,315	18.0	5.700	2.8	-0.5	5.670	2.7
C&C Outlets**	360	0.7	0.0	360	0.7	7.910	3.9	-4.2	7.580	3.7
Total	**52,065**	**100.0**	**-0.8**	**51,665**	**100.0**	**202.820**	**100.0**	**1.7**	**206.295**	**100.0**

* specialty perfumeries and retail drugstores only (no specialty drugstores included)

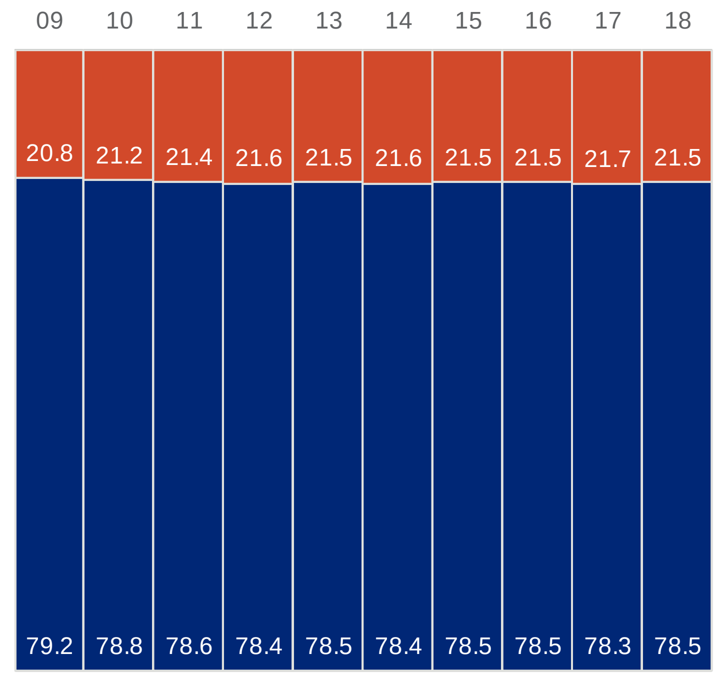
** Chain department stores and C&C Outlets **only grocery sales**

Pharmacies

Number of stores in %



Sales share in %



Ret. groc. trade	10	11	12	13	14	15	16	17	18	19
No.	21,576	21,481	21,333	21,181	20,963	20,902	20,317	20,153	19,849	19,528
Change in %		-0.4	-0.7	-0.7	-1.0	-0.3	-2.8	-0.8	-1.5	-1.6

Ret. groc. trade	09	10	11	12	13	14	15	16	17	18
€ in bn	37.00	37.80	38.70	39.80	41.80	43.90	46.90	48.80	49.80	51.10
Change in %		2.2	2.4	2.8	5.0	5.0	6.8	4.1	2.0	2.6

Source: IQVia, Frankfurt / Main

Pet stores – Definition

Retail outlets which offer pet supplies such as pet food, accessories and also live animals.

Pet stores include multiple stores, that is pet supply retailers with at least 4 branch stores and independent supply retailers with selling space of over 300 sq m.

	Number of stores					Sales in billion €				
	01.01.2018		19:18	01.01.2019		2017		18:17	2018	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Freßnapf	885	57.7	-1.7	870	55.0	1.250	66.0	4.0	1.300	66.0
Futterhaus	295	19.2	8.5	320	20.3	0.344	18.1	7.0	0.368	18.7
Petstores (excl. Freßnapf, Futterhaus)	355	23.1	9.9	390	24.7	0.301	15.9	0.3	0.302	15.3
Total	**1,535**	**100.0**	**2.9**	**1,580**	**100.0**	**1.895**	**100.0**	**4.0**	**1.970**	**100.0**

Do-It-Yourself stores/Garden centers – Definition and development

Do-It-Yourself stores

Retail outlets with a covered surface size of 1,000 sq m or more and having their own cash registers and selling primarily to private consumers. These retail outlets carry a wide range of products for the Do-It-Yourself market.

Garden centers

Retail outlets with surface size of 400 sq m or more whose turnover results mostly from the sale of garden tools and supplies (incl. fertilizer and pesticide). The outlet must have at least one own cash register.

Number of stores per 01.01.2019:

• Do-it-yourself stores	2,155
• Garden centers	400

Gas stations – Definition

Point of sale for petrol and lubricants that are owned and operated by either oil companies or independents, that

- are supplied regularly by distributors,
- have a walk in shop and which …

Street gas stations

… are located on public streets (but not next to a motorway).

Interstate gas stations

... are located next to a motorway.

Truck stops

… are located in the immediate catchment area of the motorway but not next to a housing area. They have free access and parking places for trucks.

Gas stations

	Number of stores *					Sales**
	01.01.2018		19:18	01.01.2019		18:17
	abs.	%	%	abs.	%	%
Street gas stations	9,285	95.6	-6.1	8,715	95.3	-0.6
• Aral	2,195	22.6	-1.8	2,155	23.6	-0.5
• Shell	1,835	18.9	1.9	1,870	20.4	-1.5
• Esso	970	10.0	-1.0	960	10.5	-2.0
• Jet	650	6.7	1.5	660	7.2	0.0
• Orlen/Star***	580	6.0	-100.0	0	0.0	-2.0
• Westfalen	230	2.4	0.0	230	2.5	-2.8
• Other street gas stations	2,825	29.1	0.5	2,840	31.1	1.1
BAB-Gas station (motorway)	430	4.4	0.0	430	4.7	2.0
Total	**9,715**	**100.0**	**-5.9**	**9,145**	**100.0**	**-0.4**

* Basis: Number of gas stations with stores (incl. truck stops und motorway service areas, interstate gas stations, excl. brand-independent gas stations)
** Only grocery sales
*** as from 2019: Orlen/Star is not part of IRI Universe

Street gas stations – Regions

	Number of stores *					Sales**
	01.01.2018		19:18	01.01.2019 ***		18:17
	abs.	%	%	abs.	%	%
North-West	1,430	15.4	-12.9	1,245	14.3	-1.2
North Rhine-Westphalia	2,065	22.2	-9.7	1,865	21.4	-1.0
Central	1,255	13.5	-0.8	1,245	14.3	-0.6
Baden-Wuerttemberg	1,255	13.5	0.0	1,255	14.4	0.0
Bavaria	1,665	17.9	0.3	1,670	19.2	-0.3
North-East	705	7.6	-9.2	640	7.3	-0.6
Thuringia/Saxony	670	7.2	-12.7	585	6.7	-0.3
Berlin	240	2.6	-12.5	210	2.4	-0.5
Total Germany	**9,285**	**100.0**	**-6.1**	**8,715**	**100.0**	**-0.6**
• West	7,670	82.6		7,280	83.5	
• East	1,615	17.4		1,435	16.5	

* Basis: Number of gas stations with stores (incl. truck stops und motorway service areas, interstate gas stations, excl. brand-independent gas stations)
** Only grocery sales
*** as from 20109: Orlen/Star is not part of IRI Universe

- North-West: Schleswig-Holstein, Hamburg, Lower Saxony, Bremen
- Central: Hesse, Rhineland-Palatinate, Saarland
- North-East: Mecklenburg-Western Pomerania, Brandenburg, Saxony-Anhalt

Products and services of IRI

Markets

- Nonalcoholic beverages
- Beer
- Spirits/Sparkling wine/Wine
- Hot beverages
- Sweets/Confectionery/Long-lasting Baked Goods
- Chilled food
- Food
- Fragrance/Cosmetics
- Bodycare
- OTC
- Detergents, Cleansers and Cleaning Agents
- Petfood

InfoScan

- Classic retail grocery stores
  - Stores up to 199 m^2
  - Hypermarkets 200-799 m^2
  - Hypermarkets > 800 m^2
  - Discounters
  - Brand-Name Discounters
  - Classic Discounters (Aldi, Norma Lidl)
- Drugstores
- Chain Department stores
- Speciality perfumeries
- Beverage Specialty stores
- C&C Outlets
- Pet shops
- Garden centers
- Do-it-yourself stores
- Gas stations
- Kiosks, Snack-Bars
- E-commerce**
- ILD

IRi Infoscan

*** only available for some categories - no standard; E-commerce = stand-alone total segment including online drugstores + perfumeries + department stores + Amazon; no NAD available*

Basic data – Germany

Population	83.0 M.
German	73.0 M.
Non-German	10.0 M.
Private households	40.68 M.
Private German households	36.44 M.
Private non-German households	4.24 M.
Retail grocery stores (excl. Aldi)	30,795

Population/Households: GfK-Prognosis 01.01.2019

Basic data – Germany

	Population			Area	Inhabitants
	in thousands	in million	percentage	in sq km	per sq km
North-West	13,395	13.4	16.1	64,689	207
North Rhine-Westphalia	17,933	17.9	21.6	34,112	526
Central	11,345	11.3	13.7	43,545	261
Baden-Wuerttemberg	11,076	11.1	13.3	35,748	310
Bavaria	13,083	13.1	15.8	70,542	185
North-East	6,330	6.3	7.6	73,403	86
Thuringia/Saxony	6,221	6.2	7.5	34,652	180
Berlin	3,645	3.6	4.4	891	4,090
Total Germany	**83,029**	**83.0**	**100.0**	**357,582**	**232**
• West	66,833	66.8	80.5	248,636	269
• East	16,196	16.2	19.5	108,946	149

- North-West: Schleswig-Holstein, Hamburg, Lower Saxony, Bremen
- Central: Hesse, Rhineland-Palatinate, Saarland
- North-East: Mecklenburg-Western Pomerania, Brandenburg, Saxony-Anhalt

Source: Own calculation based on official statistics: Statistisches Bundesamt, Wiesbaden 2019

Basic data – Germany

	Number of stores		Sales in billion €		Population		Inhabitants per store	Stores per 1000 Inh.
	abs.	%	billion €	%	in thousands	%		
North-West	4,910	15.9	24.905	17.5	13,395	16.1	2,728	0.37
North Rhine-Westphalia	5,865	19.0	29.445	20.7	17,933	21.6	3,058	0.33
Central	4,345	14.1	19.345	13.6	11,345	13.7	2,611	0.38
Baden-Wuerttemberg	3,655	11.9	18.645	13.1	11,076	13.3	3,030	0.33
Bavaria	5,195	16.9	19.930	14.0	13,083	15.8	2,518	0.40
North-East	3,070	10.0	12.515	8.8	6,330	7.6	2,062	0.48
Thuringia/Saxony	2,935	9.5	11.660	8.2	6,221	7.5	2,120	0.47
Berlin	820	2.7	5.855	4.1	3,645	4.4	4,445	0.22
Total Germany	**30,795**	**100.0**	**142.300**	**100.0**	**83,029**	**100.0**	**2,696**	**0.37**
• West	23,970	77.8	112.270	78.9	66,833	80.5	2,788	0.36
• East	6,825	22.2	30.030	21.1	16,196	19.5	2,373	0.42

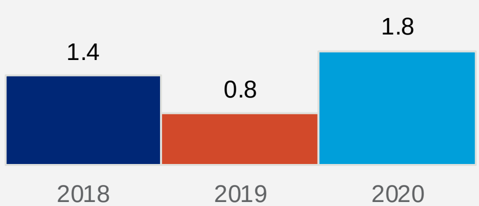
- North-West: Schleswig-Holstein, Hamburg, Lower Saxony, Bremen
- Central: Hesse, Rhineland-Palatinate, Saarland
- North-East: Mecklenburg-Western Pomerania, Brandenburg, Saxony-Anhalt

Source: Own calculation based on official statistics: Statistisches Bundesamt, Wiesbaden 2019

Economic key data – Germany

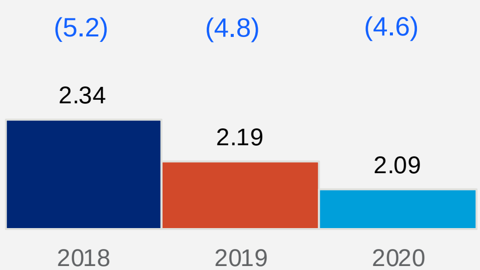
Economic growth

Change in real
Gross National Product
(compared to previous year
in %)



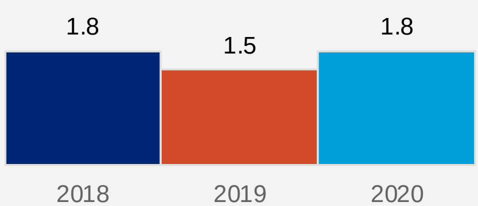
Employment market

Unemployment in million
(rate in %)*



Price development

Price level of private
consumption
(compared to previous year
in %)

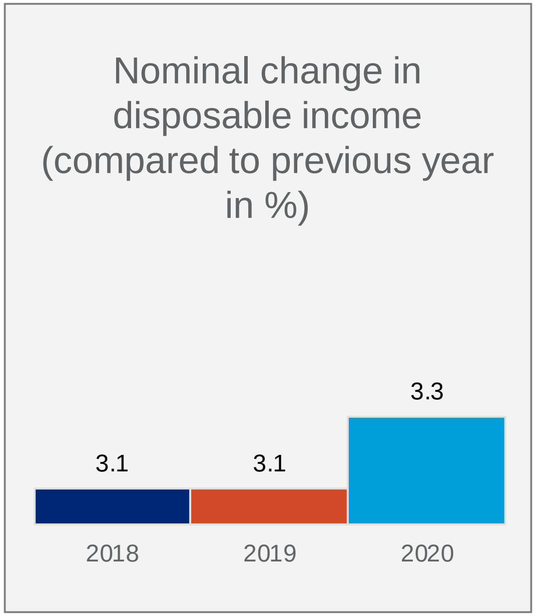


* Share of unemployed compared to domestic employable persons (residency concept)

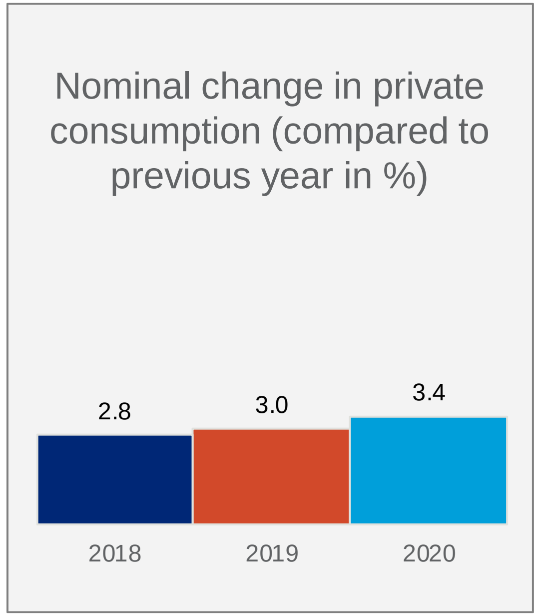
Source: Projektgruppe „Gemeinschaftsdiagnose“ Joint Economic Forecast Spring Report 2019; (as of: 12.04.2019)

Economic key data – Germany

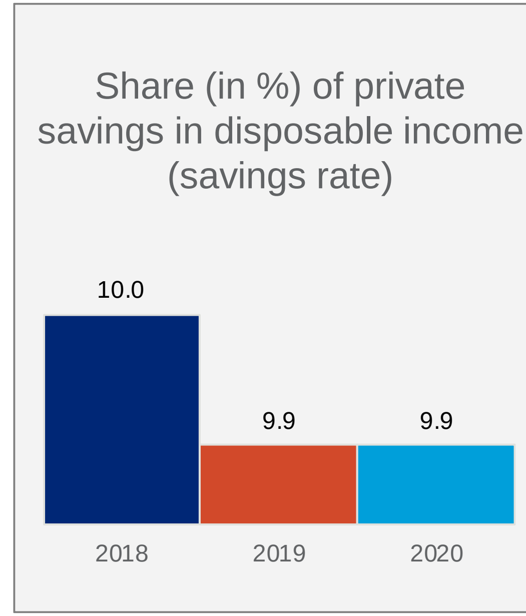
Income



Private consumption



Private savings



Source: Projektgruppe „Gemeinschaftsdiagnose“ Joint Economic Forecast Spring Report 2019; (as of: 12.04.2019)

THANK YOU!

For More Information, Contact Us…

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