UNIVERSES 2020
GERMANY

Updated: September 2020

Growth delivered.

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Introduction

This Universes 2020 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 2019/2020 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

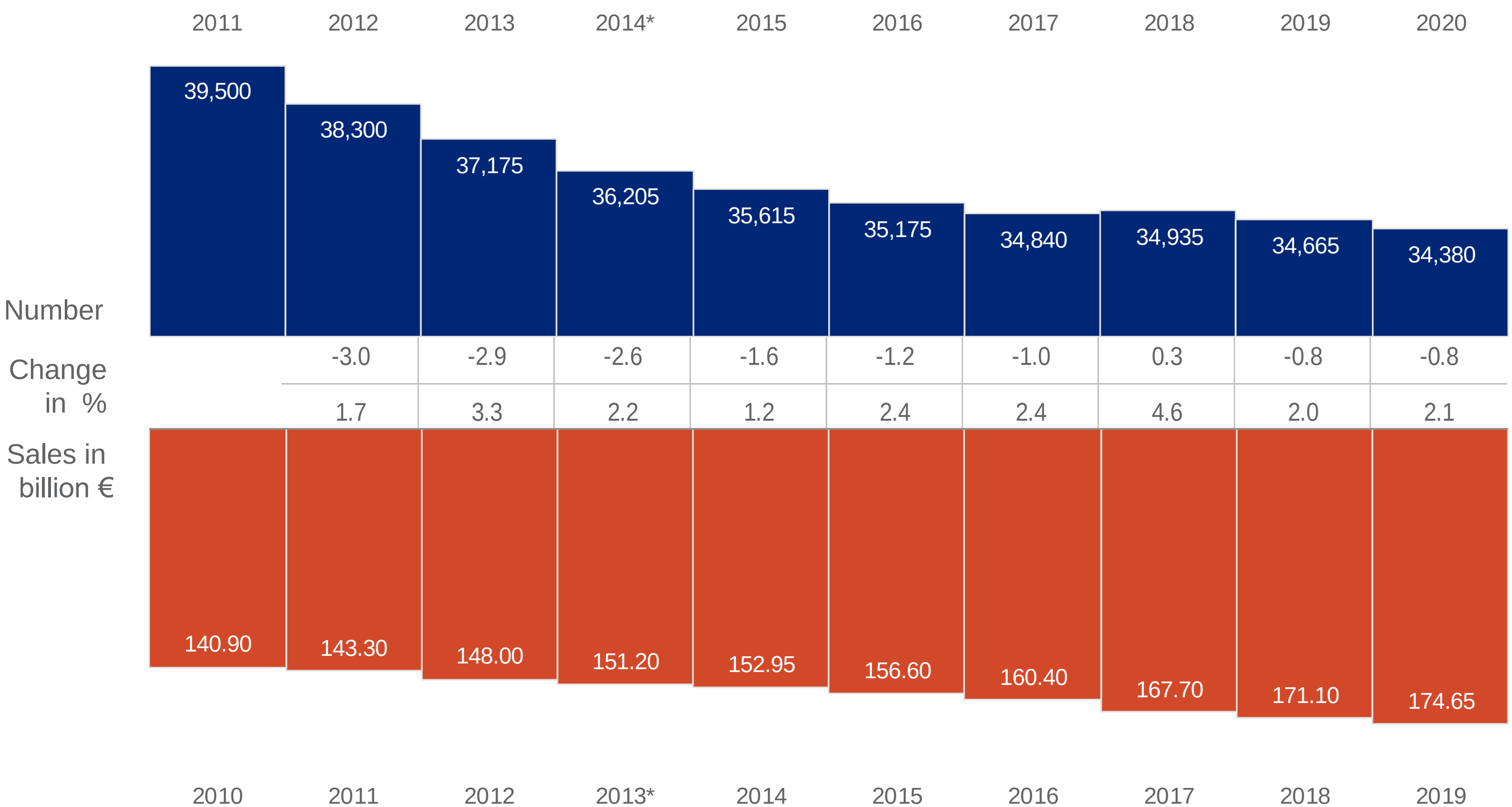
Value sales in the grocery class of trade* (incl. Aldi) increased by 2.1% to €174.65 bn in 2019.

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 2019, Germany had a total of 34,380 grocery stores with Aldi itself ending the year with a total of 4,250 stores nationwide.

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

* Due to the decision of tegut (Markant) to discontinue the data delivery (effective since 01.01.2020), all data from tegut has been respectively removed from the IRI Universe starting from the year 2014.

Total retail food trade – incl. Aldi



* As from 2014: tegut has been removed from the IRI Universe

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)

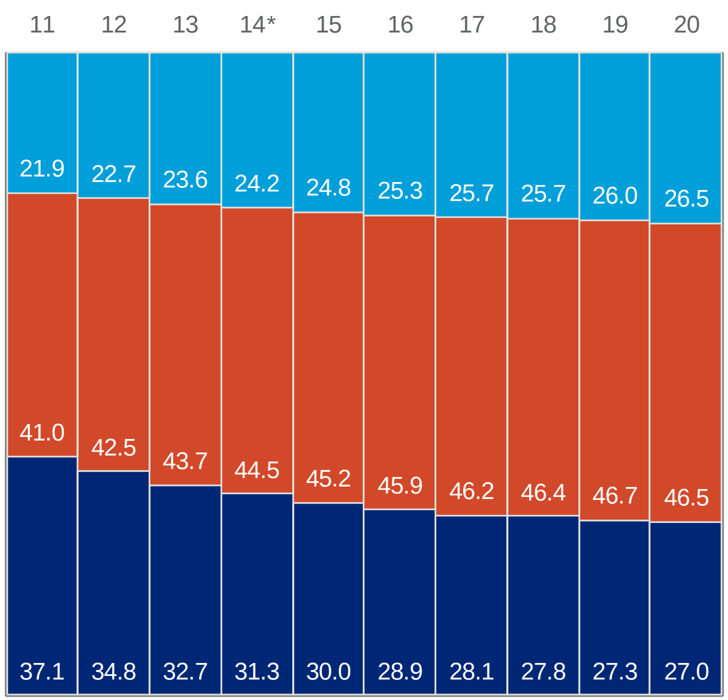
Discounters are self-service stores carrying mainly groceries in a limited range with emphasis on low prices. They have only basic furnishing and central check-outs. The most important representatives of this type of stores are Aldi, Lidl, Netto, Norma, Penny.

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 %

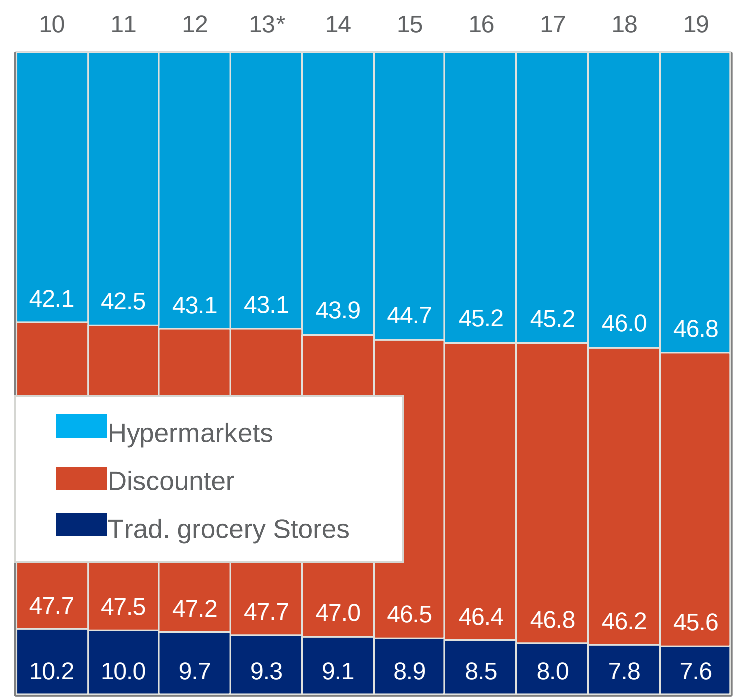


39,500 37,175 35,615 34,840 34,665

38,300 35,205 35,175 34,935 34,380

-3.0 -2.9 -1.9 -2.4 -1.2 -1.0 0.3 -0.8 -0.8

Sales share in %



Ret. groc. trade 140.90 148.00 152.95 160.40 171.10

No. / € in bn 143.30 151.20 156.60 167.70 174.65

Change in % 1.7 3.3 2.2 1.2 2.4 2.4 4.6 2.0 2.1

* As from 2014: tegut has been removed from the IRI Universe

Hypermarkets – Development

Hypermarkets were among the winners in Total Grocery in 2019 again.

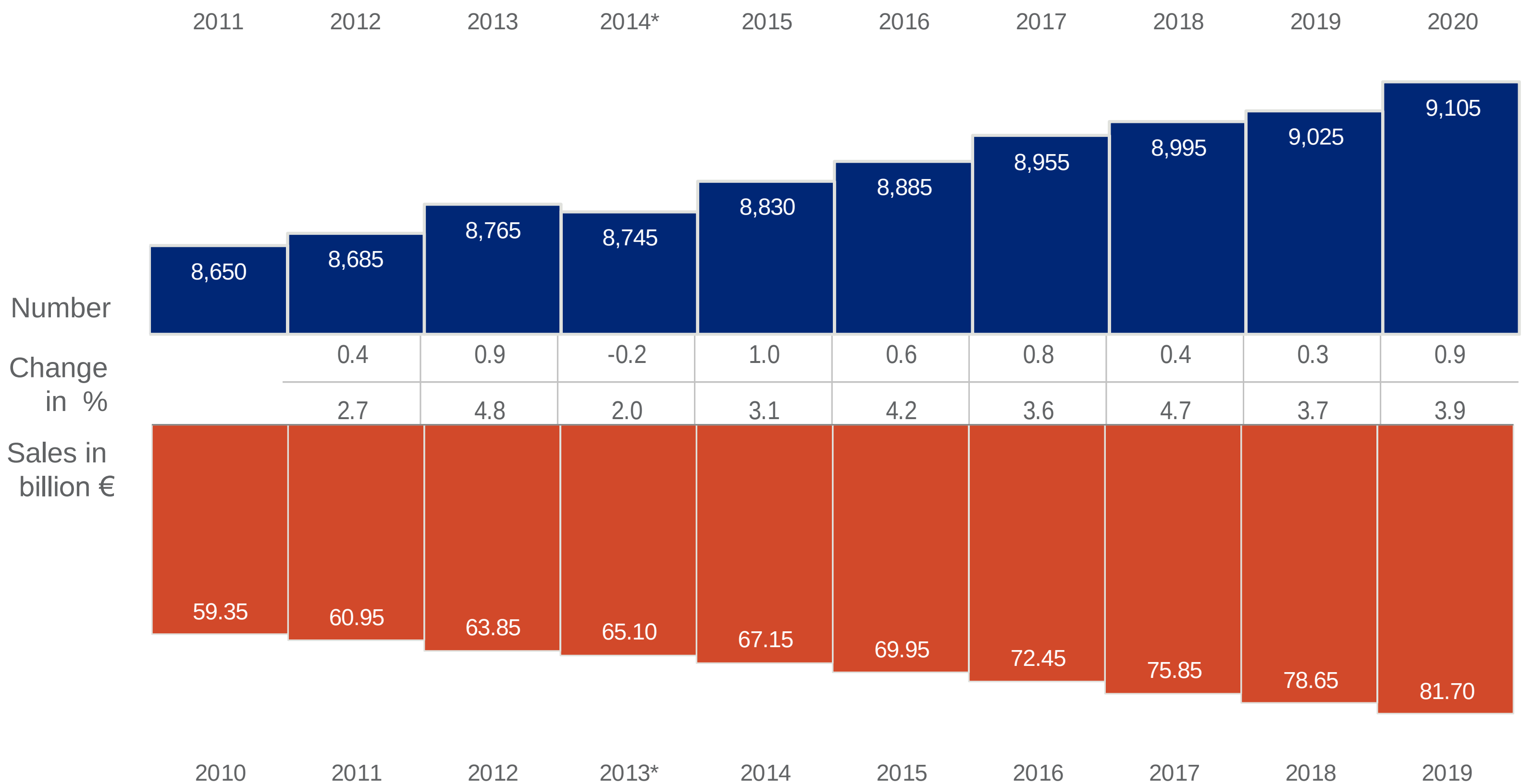
Due to the openings and selling space expansions the number of stores increased to 9,105. Nevertheless, it should be noted that 53.4% of the hypermarkets sales volume is generated by the smaller markets (selling spaces ranging from 800 to 1,499 sq m or from 1,500 to 2,499 sq m), which account for 77.4% of all hypermarkets.

Value sales increased to €81.70bn in 2019; hence the average turnover for hypermarkets slightly increased to €9m as well.

Regional distribution of hypermarkets at the end of 2019, by IRI regions:

• North-West	1,755	(+ 1.1%)
• North Rhine-Westphalia	1,815	(0.0%)
• Central	1,295	(+ 0.9%)
• South	2,645	(+ 0.8%)
• East	1,595	(+ 1.8%)
• Total:	9,105	(+ 0.9%)

Hypermarkets



* As from 2014: tegut has been removed from the IRI Universe

Discounters – Development incl. Aldi

Discounters – positive performance in 2019

The decrease of number of stores by 1.1% was accompanied by an increase in value sales by 0.7% to €79.68bn.

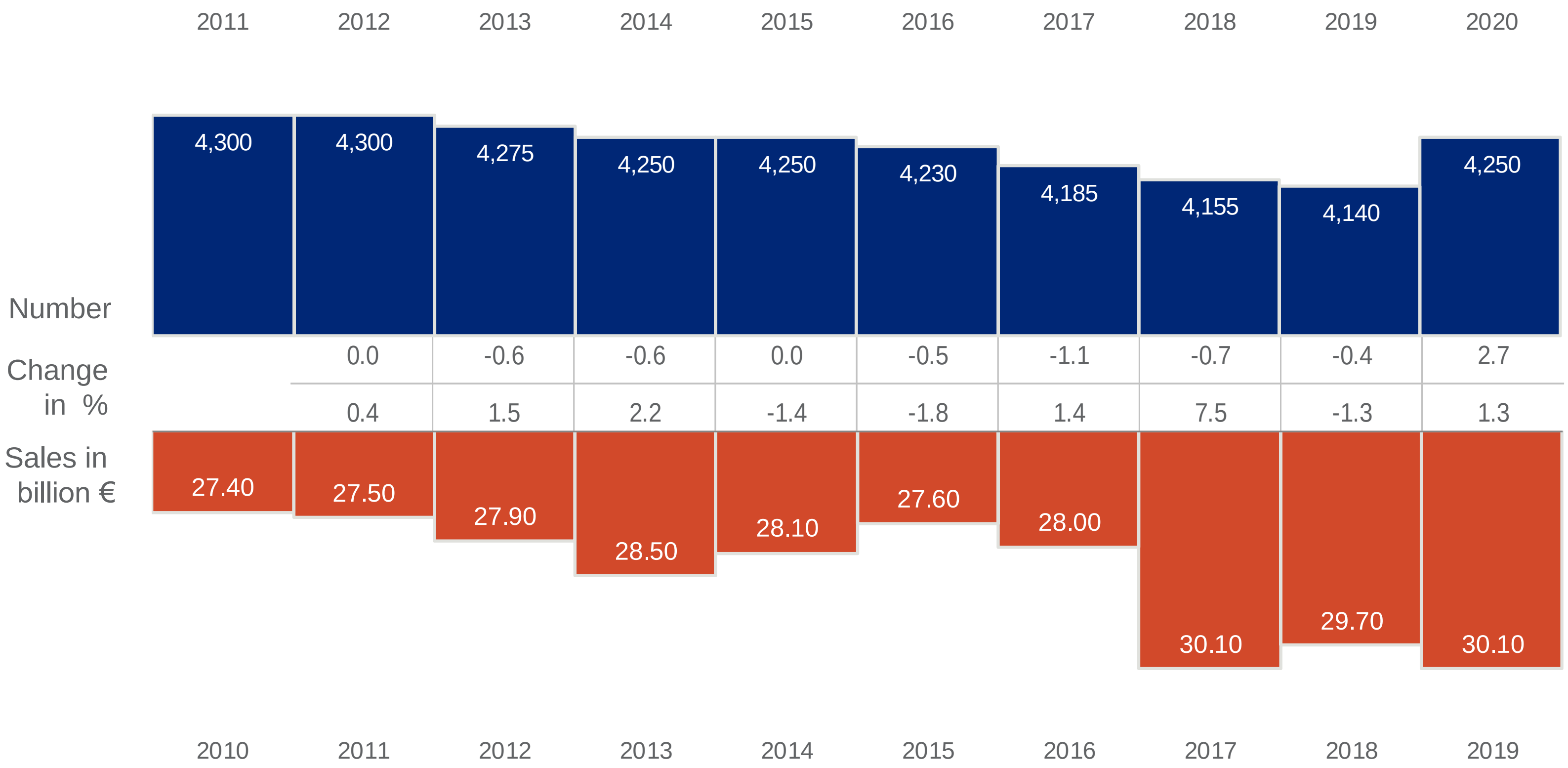
In 2019 this store type represents a value share of 46% of total grocery, which puts discounters even ahead of traditional grocery.

When Aldi is not included, discounters nowadays represent 28.3% of the total grocery value sales in Germany (€174.65bn).

Regional distribution of discounters (incl. Aldi) at the end of 2019, East vs West:

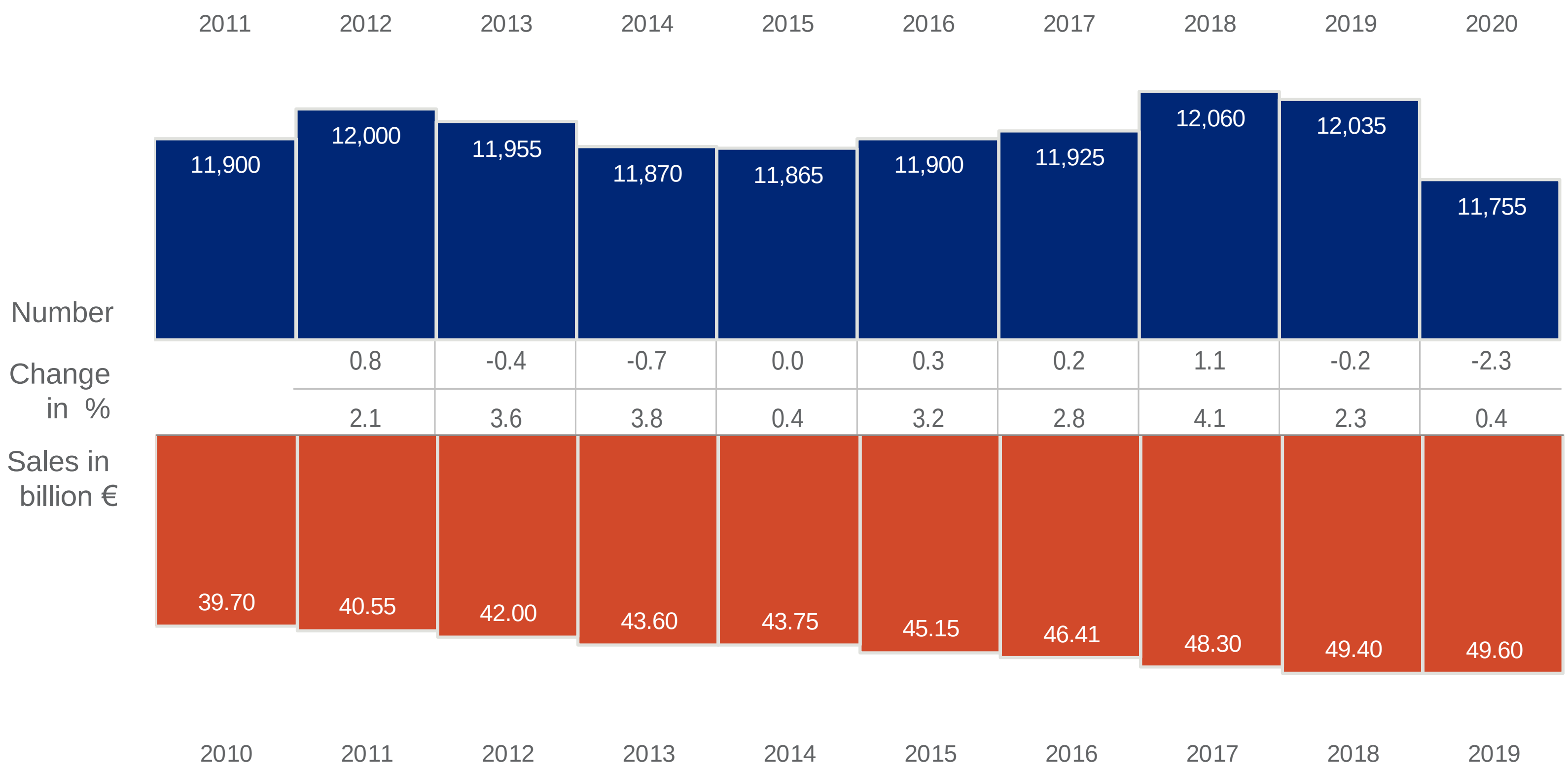
• West	11,940	(– 0.7%)
• East	4,065	(– 1.9%)
• Total	16,005	(– 1.1%)

Aldi



* co-operation partner GfK: FOOD-Sales exclusively

Discounters – excl. Aldi



Discounters

Company	Name	Discounters incl. Aldi		Discounters excl. Aldi	
		Number 01.01.2020	Sales 2019	Number 01.01.2020	Sales 2019
		16,005	**79.68**	**11,755**	**49.58**
		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 Disc./Coop.*	Diska, NP	4	2	5	3

*All Treff-Discounters have been closed down by 31.12.2019

Traditional grocery stores – Development

Number of Outlets and Value Sales continue to decline

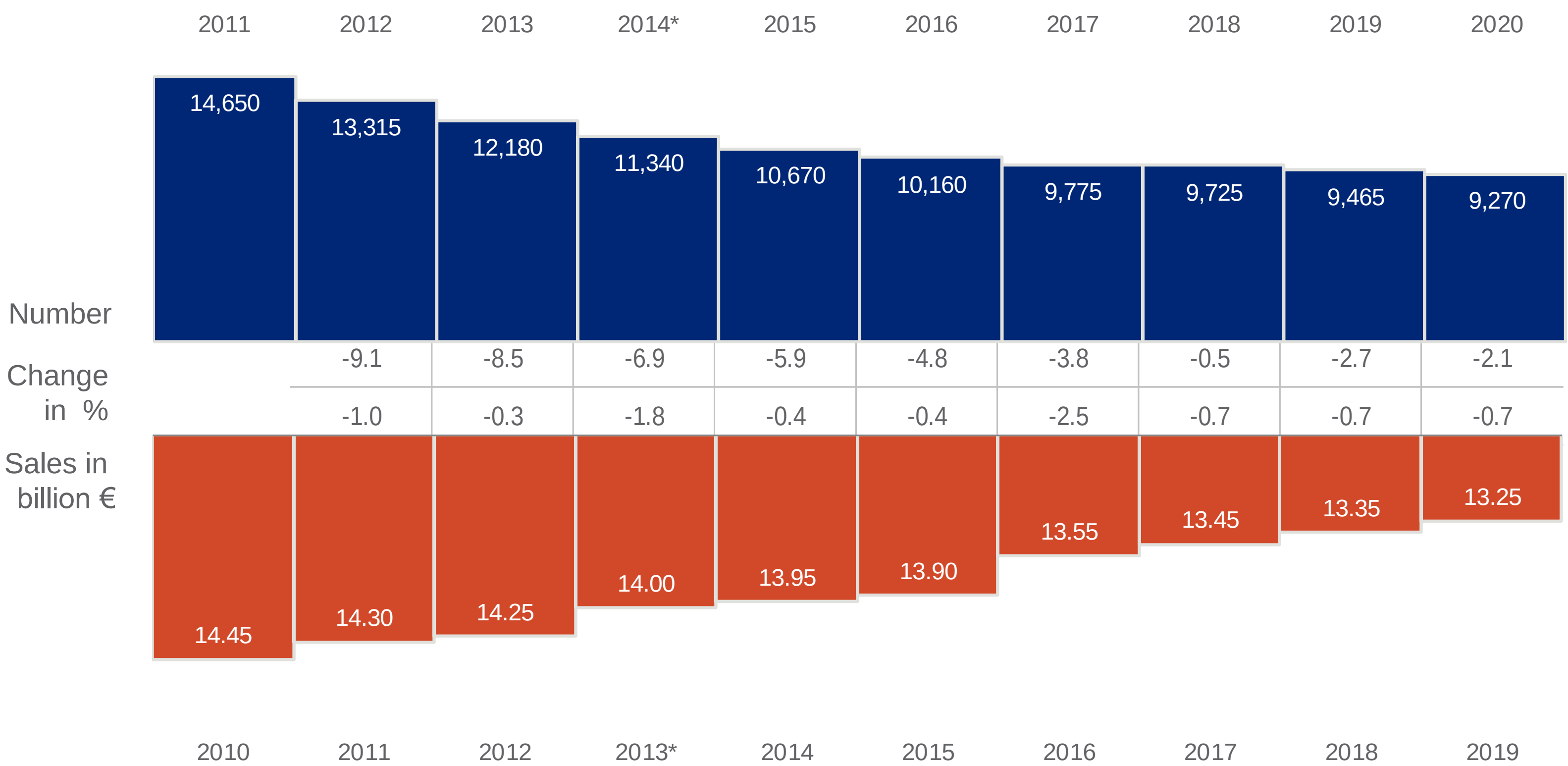
The total number of traditional grocery stores has declined. The number of stores in the largest category (3,530 stores up to 199 sq m) decreased by 3.7 %.

The entire traditional grocery store category again suffered losses in value sales in 2019. Sales fell by 0.7% to €13.25bn. Traditional grocery stores thus account for only 9.2% of total retail grocery sales (excl. Aldi).

Regional distribution of traditional grocery stores at the end of 2019, East vs West:

• West	7,490	(– 1.9%)
• East	1,780	(– 2.9%)
• Total	9,270	(– 2.1%)

Traditional grocery stores



* As from 2014: tegut has been removed from the IRI Universe

Store types – excl. Drugstores

	Number of stores					Sales in billion				
	01.01.2019		20:19	01.01.2020		2018		19:18	2019	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Hypermarkets	9,025	29.6	0.9	9,105	30.2	78.68	55.7	3.9	81.72	56.5
Discounters	12,035	39.4	-2.3	11,755	39.0	49.40	34.9	0.4	49.58	34.3
Traditional grocery stores	9,465	31.0	-2.1	9,270	30.8	13.33	9.4	-0.5	13.26	9.2
Total	**30,525**	**100.0**	**-1.3**	**30,130**	**100.0**	**141.40**	**100.0**	**2.2**	**144.55**	**100.0**
Aldi	4,140		2.7	4,250		29.70		1.3	30.10	

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).

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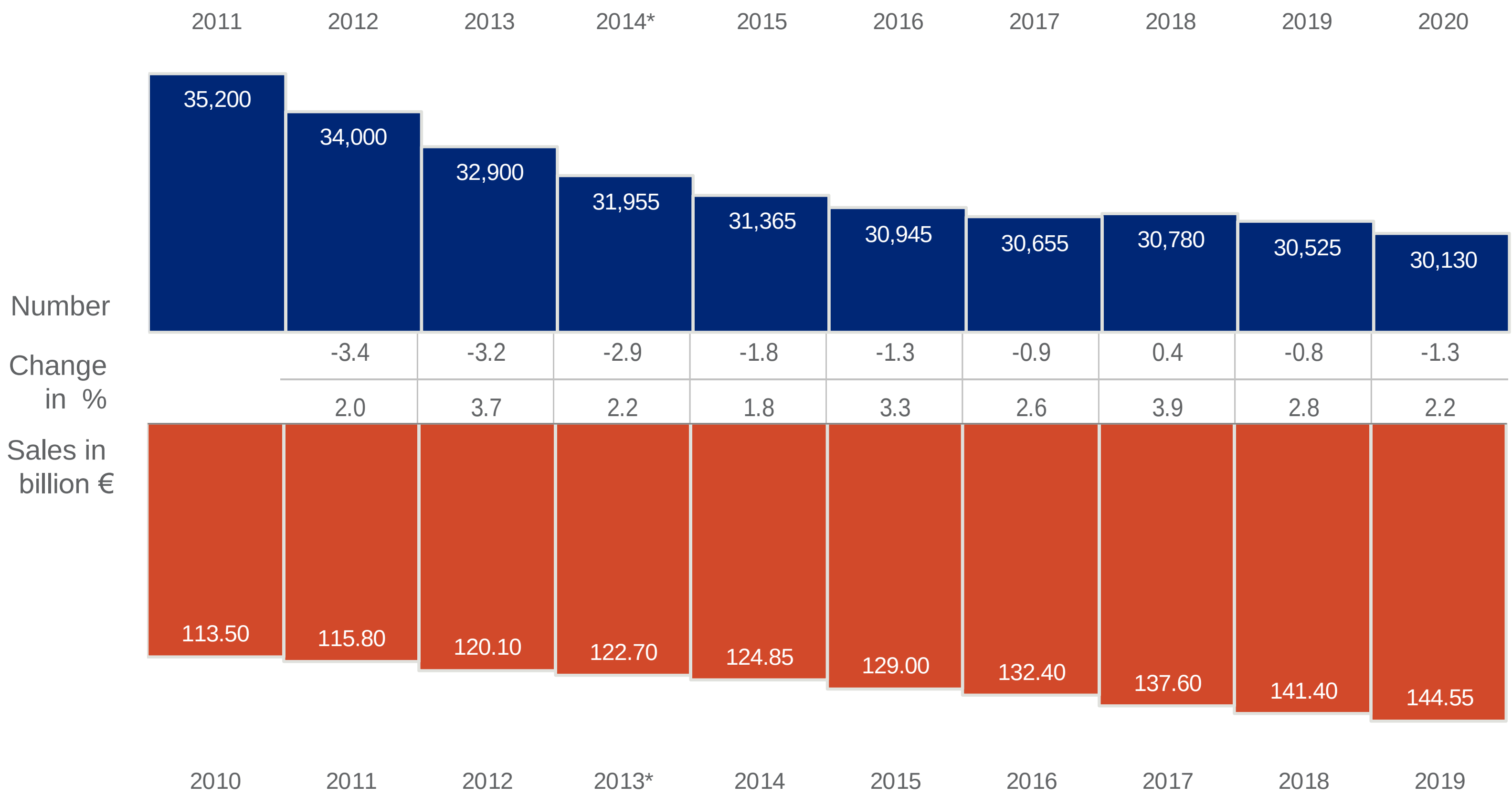
Selling space categories – incl. Aldi

	Number of stores					Sales in billion €				
	01.01.2019		20:19	01.01.2020		2018		19:18	2019	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
up to 199 sq m	3,665	10.6	-3.7	3,530	10.3	1.320	0.8	-2.3	1.290	0.7
200 to 399 sq m	2,740	7.9	-0.7	2,720	7.9	2.620	1.5	-1.1	2.590	1.5
400 to 799 sq m	3,060	8.8	-1.3	3,020	8.8	9.385	5.5	-0.1	9.375	5.4
800 to 1499 sq m	4,167	12.0	-0.6	4,140	12.0	22.100	12.9	3.6	22.905	13.1
1500 to 2499 sq m	2,814	8.1	3.4	2,910	8.5	19.795	11.6	4.6	20.710	11.9
2500 to 4999 sq m	1,384	4.0	1.2	1,400	4.1	17.680	10.3	4.1	18.405	10.5
5000 s qm or more	660	1.9	-0.8	655	1.9	19.100	11.2	3.1	19.700	11.3
Discounters excl. Aldi	12,035	34.8	-2.3	11,755	34.1	49.400	28.8	0.4	49.575	28.4
Aldi	4,140	11.9	2.7	4,250	12.4	29.700	17.4	1.3	30.100	17.2
Total	**34,665**	**100.0**	**-0.8**	**34,380**	**100.0**	**171.100**	**100.0**	**2.1**	**174.650**	**100.0**

Selling space categories – excl. Aldi

	Number of stores					Sales in billion €				
	01.01.2019		20:19	01.01.2020		2018		19:18	2019	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
up to 199 sq m	3,665	12.0	-3.7	3,530	11.7	1.320	0.9	-2.3	1.290	0.9
200 to 399 sq m	2,740	9.0	-0.7	2,720	9.0	2.620	1.9	-1.1	2.590	1.8
400 to 799 sq m	3,060	10.0	-1.3	3,020	10.0	9.385	6.6	-0.1	9.375	6.5
800 to 1499 sq m	4,167	13.7	-0.6	4,140	13.7	22.100	15.6	3.6	22.905	15.8
1500 to 2499 sq m	2,814	9.2	3.4	2,910	9.7	19.795	14.0	4.6	20.710	14.3
2500 to 4999 sq m	1,384	4.5	1.2	1,400	4.6	17.680	12.5	4.1	18.405	12.7
5000 s qm or more	660	2.2	-0.8	655	2.2	19.100	13.5	3.1	19.700	13.6
Discounters excl. Aldi	12,035	39.4	-2.3	11,755	39.1	49.400	35.0	0.4	49.575	34.4
Total	**30,525**	**100.0**	**-1.3**	**30,130**	**100.0**	**141.400**	**100.0**	**2.2**	**144.550**	**100.0**

Total retail food trade – excl. Aldi



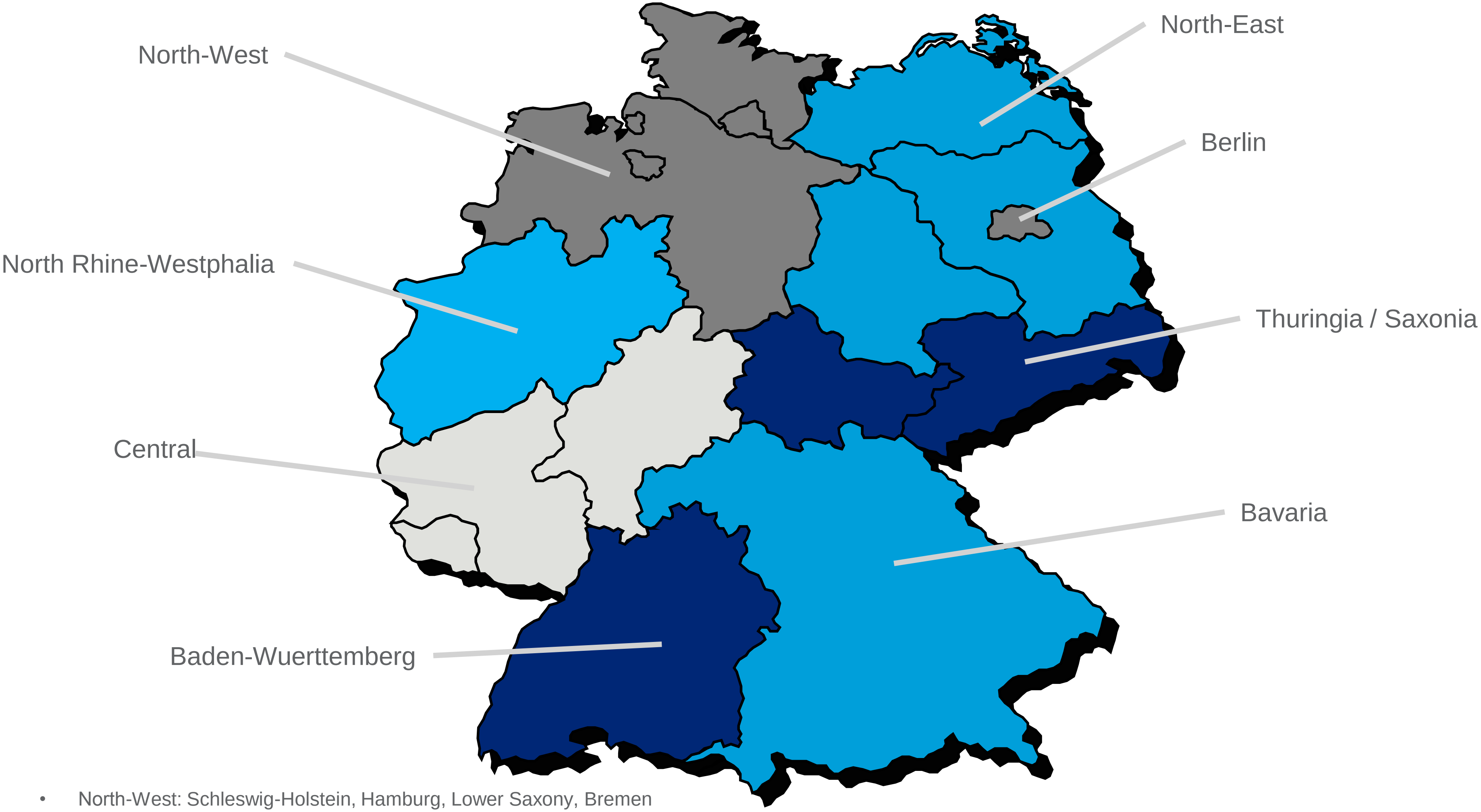
* As from 2014 Tegut has been removed from the IRI Universe

Regions – excl. Aldi

	Number of stores					Sales in billion €				
	01.01.2019		20:19	01.01.2020		2018		19:18	2019	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
North-West	4,905	16.1	-1.2	4,845	16.1	24.880	17.6	2.2	25.435	17.6
North Rhine-Westphalia	5,865	19.1	-1.1	5,800	19.2	29.445	20.8	2.2	30.100	20.8
Central	4,192	13.7	-1.5	4,130	13.7	18.785	13.3	2.2	19.205	13.3
Baden-Wuerttemberg	3,648	12.0	-1.6	3,590	11.9	18.615	13.2	2.2	19.030	13.2
Bavaria	5,150	16.9	-1.4	5,080	16.9	19.790	14.0	2.2	20.230	14.0
North-East	3,070	10.1	-1.3	3,030	10.1	12.515	8.9	2.2	12.795	8.9
Thuringia/Saxony	2,875	9.4	-1.2	2,840	9.4	11.515	8.1	2.2	11.770	8.1
Berlin	820	2.7	-0.6	815	2.7	5.855	4.1	2.2	5.985	4.1
Total Germany	**30,525**	**100.0**	**-1.3**	**30,130**	**100.0**	**141.400**	**100.0**	**2.2**	**144.550**	**100.0**

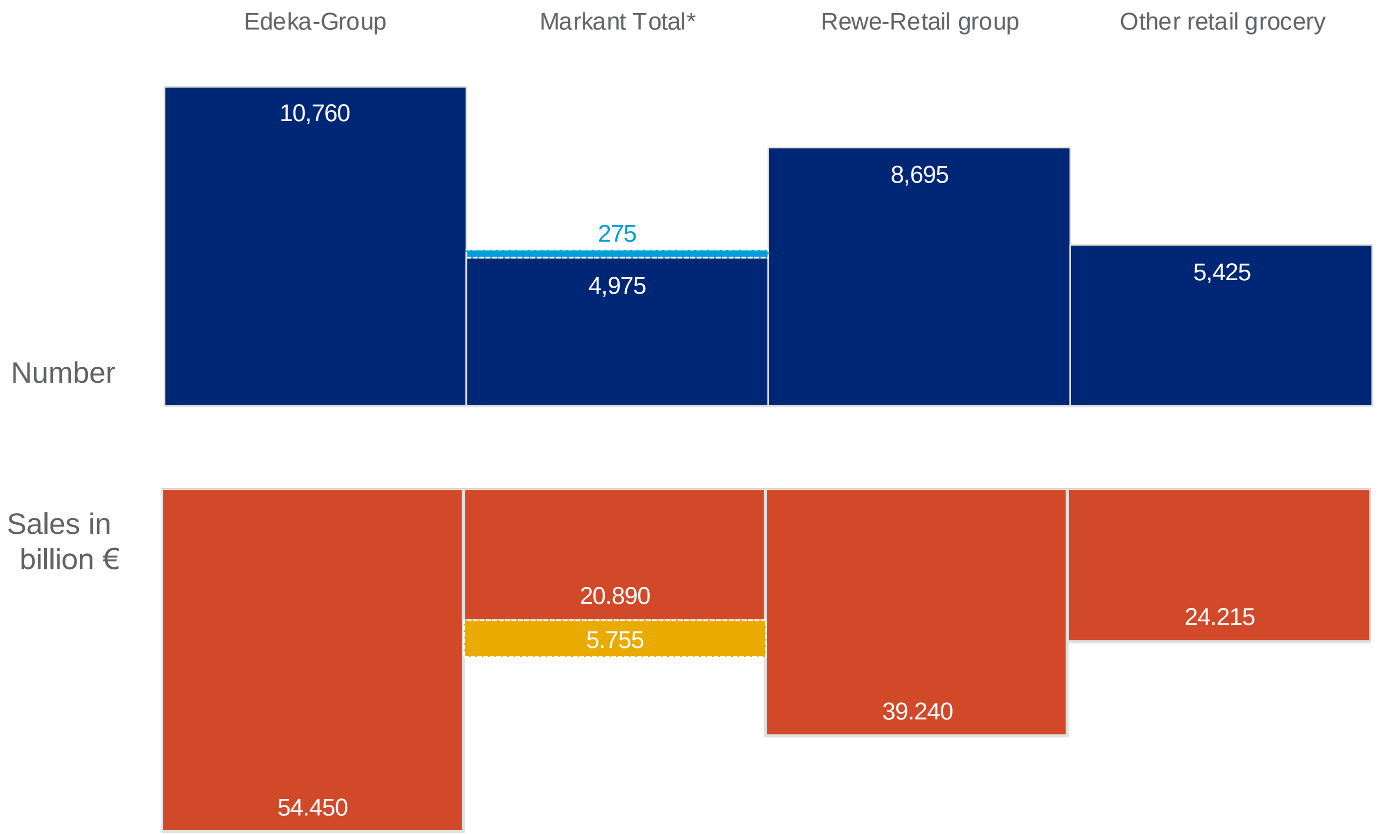
- North-West: Schleswig-Holstein, Hamburg, Lower Saxony, Bremen
- Central: Hesse, Rhineland-Palatinate, Saarland
- North-East: Mecklenburg-Western Pomerania, Brandenburg, Saxony-Anhalt

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 275 real, - sales outlets with value sales of €5.755 bn.

Key-Accounts – excl. Aldi, drugstores

Average sales per store in million €	2019
Edeka-Group	5.06
• Retailers	6.33
• Edeka Discounters/Cooperations	3.44
Markant Total	5.08
• Markant ex. real,-	4.20
• real,- (formerly Metro Einzelhandel)	20.93
Rewe Retail Group	4.51
Other retail grocery	4.46
Total	**4.80**

Key-Accounts – excl. Aldi, drugstores

	Number of stores		Sales in billion €		Number of stores > 200 m²		Sales in billion €	
	01.01.2020		2019		01.01.2020		2019	
	abs.	%	billion €	%	abs.	%	billion €	%
Edeka-Group	10,760	35.7	54.450	37.6	9,270	34.9	53.820	37.5
• Retailers	6,030	20.0	38.165	26.3	4,540	17.1	37.535	26.1
• Affiliated companies/Coop.	4,730	15.7	16.285	11.3	4,730	17.8	16.285	11.4
Markant Total	5,250	17.4	26.645	18.5	3,960	14.9	26.195	18.3
• Markant ex. real,-	4,975	16.5	20.890	14.5	3,685	13.9	20.440	14.3
• real,- (formerly Metro Einzelhandel)	275	0.9	5.755	4.0	275	1.0	5.755	4.0
Rewe Retail Group	8,695	28.9	39.240	27.1	8,205	30.8	39.080	27.3
Other retail grocery	5,425	18.0	24.215	16.8	5,165	19.4	24.165	16.9
Total	**30,130**	**100.0**	**144.550**	**100.0**	**26,600**	**100.0**	**143.260**	**100.0**

Key-Accounts – excl. Aldi, incl. drugstores

	Number of stores		Sales in billion €		Number of stores > 200 m²		Sales in billion €	
	01.01.2020		2019		01.01.2020		2019	
	abs.	%	billion €	%	abs.	%	billion €	%
Edeka-Group	10,940	31.2	54.940	33.8	9,450	29.9	54.310	33.7
• Retailers	6,030	17.2	38.165	23.5	4,540	14.4	37.535	23.3
• Affiliated companies/Coop.	4,910	14.0	16.775	10.3	4,910	15.5	16.775	10.4
Markant Total	10,050	28.6	43.845	27.0	8,760	27.8	43.395	27.0
• Markant ex. real,-	9,775	27.8	38.090	23.5	8,485	26.9	37.640	23.4
• real,- (formerly Metro Einzelhandel)	275	0.8	5.755	3.5	275	0.9	5.755	3.6
Rewe Retail Group	8,695	24.7	39.240	24.3	8,205	25.9	39.080	24.3
Other retail grocery	5,425	15.5	24.215	14.9	5,165	16.4	24.165	15.0
Total	**35,110**	**100.0**	**162.240**	**100.0**	**31,580**	**100.0**	**160.950**	**100.0**
of which drugstores	4,980		17.690		4,980		17.690	

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 37.6%.

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 6,030 grocery stores and sales of €38.165bn, Edeka Retailers represent 26.3% of the total retail food sales.

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 4,910 stores representing value sales of €16.775bn.

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
Budnikowsky	Hamburg		
Frey & Kissel	Landau	Discounters	Netto
Netto Markendiscount	Maxhütte		Diska
Diska	Rottendorf		NP
NP	Minden		
		Drugstores	Budnikowsky
		Trad. Grocery Stores	SBK compact

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 5,250 retail food stores, which attained sales of €26.645bn. 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 275 sales outlets, former Metro Retailers (Real) account for sales of €5.755bn.

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Markant – Organizational Classification

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

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		Müller		Markant
	Globus		Rossman		Um's Eck
	Jibi Markt				
	Kaufland				
	K+K Markt				
	Markant				
	Real				
	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 8,695 outlet stores generated a sales volume of €39.240bn. This results in a share of 27.1% of the total retail food sales.

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

Rewe Retail Group – Organizational classification and sales channels

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

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 by 4.1%, whereas sales value increased by 1.2% compared to the previous year.

At present the group consisting of other retail grocery stores comprises approximately 18% of all retail food stores. With sales of €24.215bn 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	Type	Sales channels
KG Königs Wusterhausen	Königs Wusterhausen	Hypermarkets	AEZ
KG Leipzig	Leipzig		Konsum Frische-Markt
KGV Magdeburg	Magdeburg		NEZ
Konsum Altenburg	Altenburg		
Konsum Dresden	Dresden	Discounters	Lidl
Lidl Discount	Neckarsulm		Norma
Norma	Nuremberg		
Other (not affiliated)		Trad. Grocery Stores	Konsum NEZ
		Drugstores	—

Drugstores/Perfumeries and specialized retailers – Definitions and development

Perfumeries and specialized retailers

Due to IRI's strategic decision to exit the premium cosmetics business (effective since 01/2020), all information related to specialty perfumeries and department stores have been respectively removed from the IRI Universe. Additional information regarding the development of the traditional specialty trade and department stores until 2019 is available in the IRI Universes 2019.

Drugstores Definition

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.

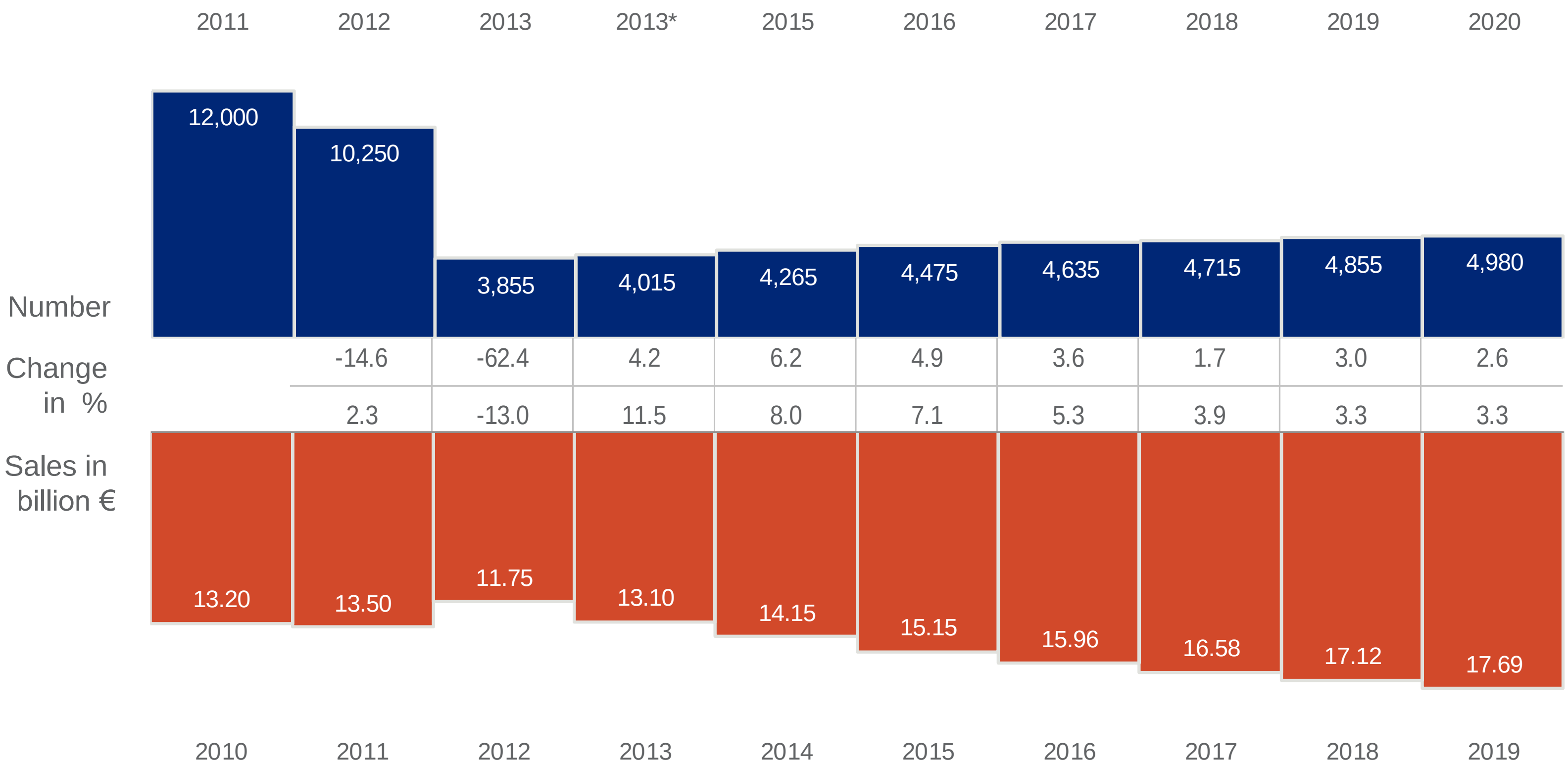
Drugstores Development

The value sales increase of 3.3% to 17.69bn was accompanied by an increase of the number of drugstores to a total of 4,980 stores.

Drugstores

	Number 01.01.2020	Sales 2019
	4,980	€17,69bn
	Shares in %	
dm	41	47
Rossmann (incl. Kloppenburg)	44	38
Müller	11	12
Budnikowsky	4	3

Drugstores

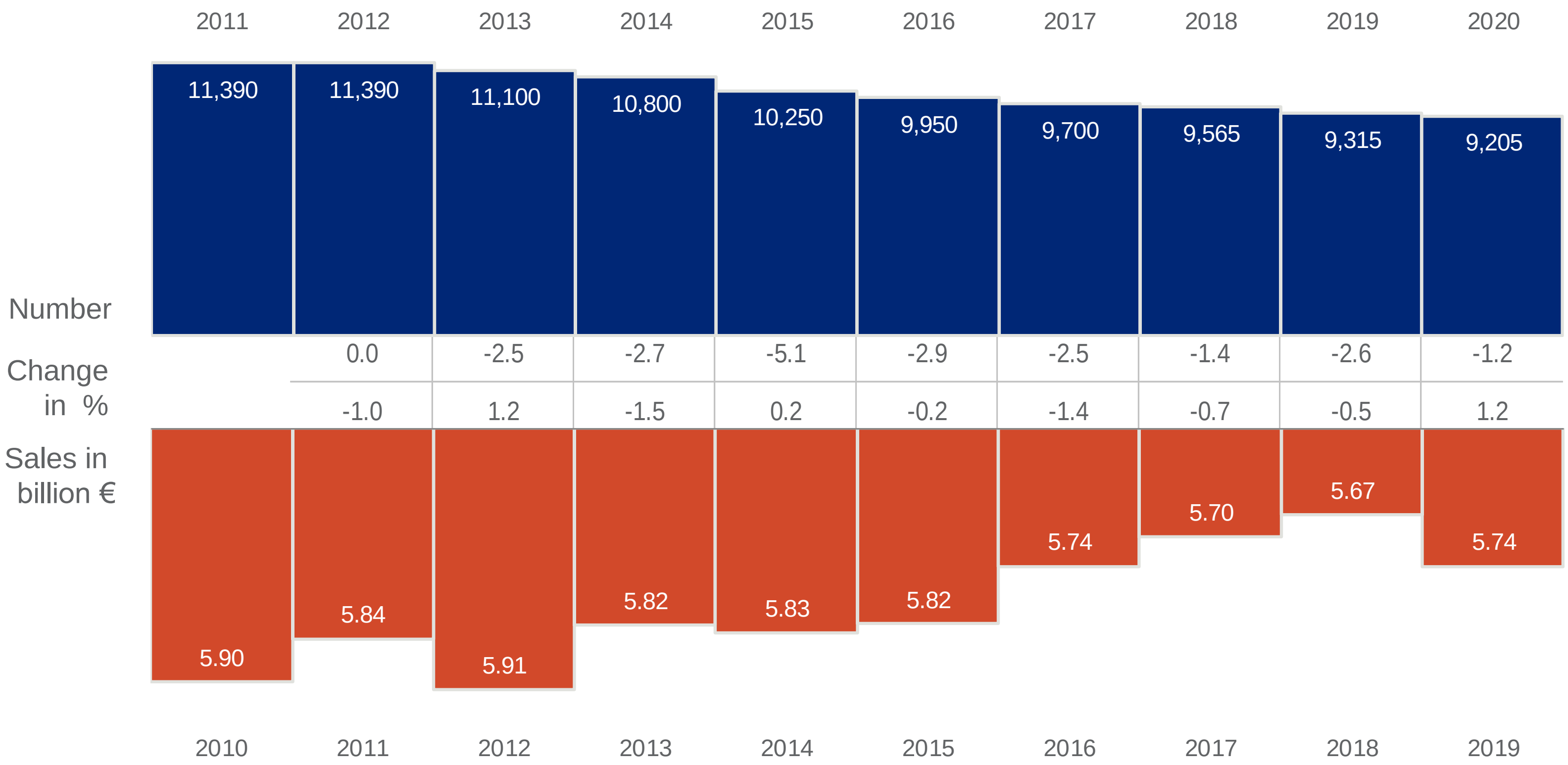


* Insolvency of Schlecker

Store types – Total retail food trade and drugstores

	Number of stores					Sales in billion				
	01.01.2019		20:19	01.01.2020		2018		19:18	2019	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Hypermarkets	9,025	22.8	0.9	9,105	23.1	78.68	41.8	3.9	81.72	42.5
Discounters	12,035	30.5	-2.3	11,755	29.8	49.40	26.2	0.4	49.58	25.8
Trad. grocery stores	9,465	23.9	-2.1	9,270	23.6	13.33	7.1	-0.5	13.26	6.9
Aldi	4,140	10.5	2.7	4,250	10.8	29.70	15.8	1.3	30.10	15.6
Drugstores	4,855	12.3	2.6	4,980	12.7	17.12	9.1	3.3	17.69	9.2
Total	**39,520**	**100.0**	**-0.4**	**39,360**	**100.0**	**188.22**	**100.0**	**2.2**	**192.34**	**100.0**

Beverage specialty stores*



* Sales: Beer and Nonalcoholic beverages product categories

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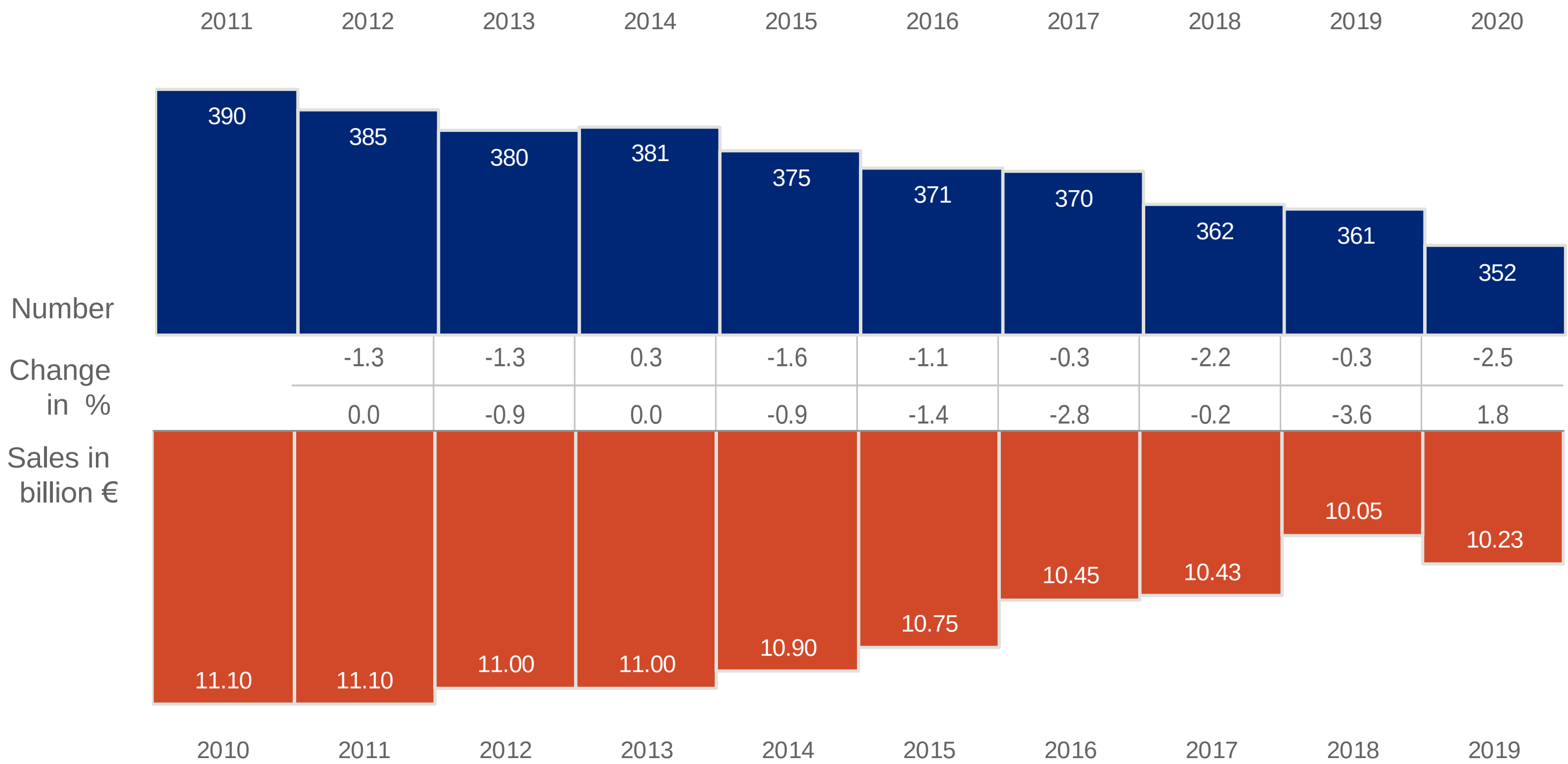
Beverage specialty stores – Regions

	Number of stores				
	01.01.2019		20:19	01.01.2020	
	abs.	%	%	abs.	%
North-West	905	9.7	-1.1	895	9.7
North Rhine-Westphalia	1,830	19.6	-1.1	1,810	19.7
Central	1,220	13.1	-1.2	1,205	13.1
Baden-Wuerttemberg	1,150	12.3	-1.3	1,135	12.3
Bavaria	2,015	21.8	-1.2	1,990	21.7
North-East	830	8.9	-1.2	820	8.9
Thuringia/Saxony	1,195	12.8	-1.3	1,180	12.8
Berlin	170	1.8	0.0	170	1.8
Total Germany	**9,315**	**100.0**	**-1.2**	**9,205**	**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


2011 2012 2013 2014 2015 2016 2017 2018 2019 2020
Number
390 385 380 381 375 371 370 362 361 352
Change in %
-1.3 -1.3 0.3 -1.6 -1.1 -0.3 -2.2 -0.3 -2.5
0.0 -0.9 0.0 -0.9 -1.4 -2.8 -0.2 -3.6 1.8
Sales in billion €
11.10 11.10 11.00 11.00 10.90 10.75 10.45 10.43 10.05 10.23
2010 2011 2012 2013 2014 2015 2016 2017 2018 2019

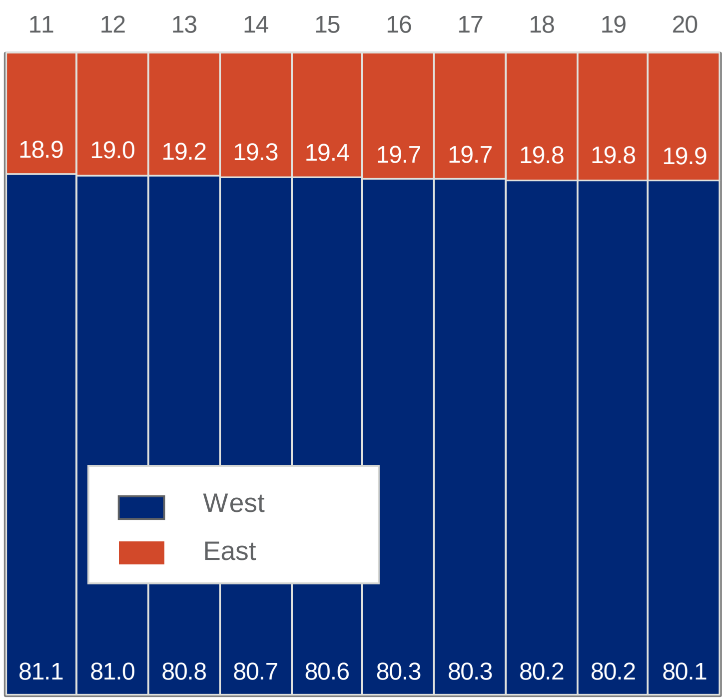
Total market

	Number of stores					Sales in billion €				
	01.01.2019		20:19	01.01.2020		2018		19:18	2019	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Hypermarkets	9,025	18.3	0.9	9,105	18.6	78.675	39.1	3.9	81.720	39.8
Discounters	12,035	24.6	-2.3	11,755	24.0	49.400	24.5	0.4	49.575	24.1
Aldi	4,140	8.4	2.7	4,250	8.7	29.700	14.7	1.3	30.100	14.6
Trad. grocery stores	9,465	19.2	-2.1	9,270	19.0	13.325	6.6	-0.5	13.255	6.4
Drugstores	4,855	9.9	2.6	4,980	10.2	17.120	8.5	3.3	17.690	8.6
Beverage speciality stores	9,315	18.9	-1.2	9,205	18.8	5.670	2.8	-0.8	5.625	2.7
C&C Outlets*	360	0.7	-2.2	352	0.7	7.580	3.8	2.2	7.750	3.8
Total	**49,195**	**100.0**	**-0.6**	**48,917**	**100.0**	**201.470**	**100.0**	**2.1**	**205.715**	**100.0**

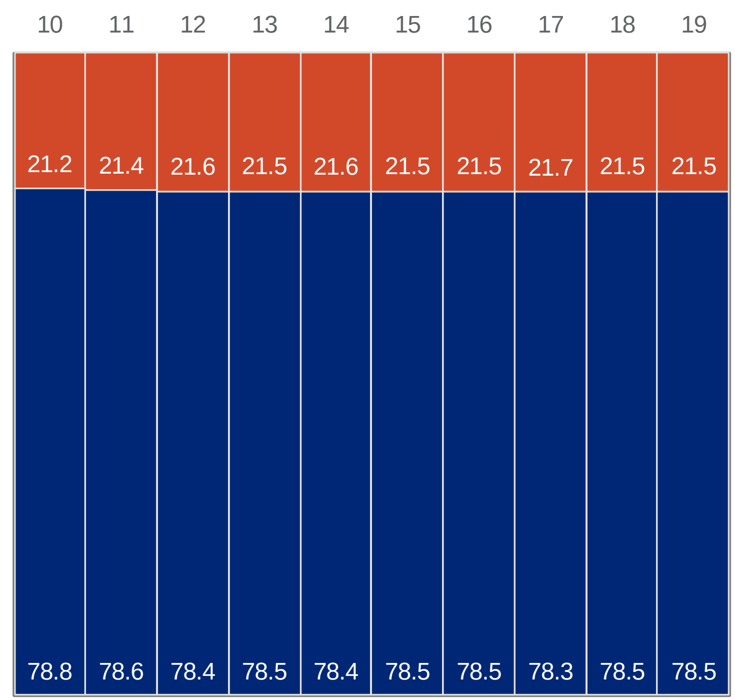
* C&C Outlets **only grocery sales**

Pharmacies

Number of stores in %



Sales share in %



21,481 21,181 20,902 20,153 19,528

21,333 20,963 20,317 19,849 19,205

-0.7 -0.7 -1.0 -0.3 -2.8 -0.8 -1.5 -1.6 -1.7

Ret. groc. trade

No. / € in bn

Change in %

37.80 39.78 43.90 48.80 51.10

37.80 41.80 46.90 49.80 53.10

2.4 2.8 5.0 5.0 6.8 4.1 2.0 2.6 3.9

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 €				
	01.01.2019		20:19	01.01.2020		2018		19:18	2019	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Freßnapf	870	55.0	-1.7	855	55.3	1.300	66.0	7.3	1.395	66.3
Futterhaus	320	20.3	3.1	330	21.4	0.368	18.7	8.7	0.400	19.0
Petstores (excl. Freßnapf, Futterhaus)	390	24.7	-7.7	360	23.3	0.302	15.3	2.6	0.310	14.7
Total	**1,580**	**100.0**	**-2.2**	**1,545**	**100.0**	**1.970**	**100.0**	**6.9**	**2.105**	**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 01.01.2020:

• Do-it-yourself stores	2,140
• Garden centers	395

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**
	01.01.2019		20:19	01.01.2020		19:18
	abs.	%	%	abs.	%	%
Street gas stations	8,715	95.3	-0.2	8,695	95.3	-0.6
• Aral	2,155	23.6	0.0	2,155	23.6	-0.5
• Shell	1,870	20.4	-0.3	1,865	20.4	-1.5
• Esso	960	10.5	-2.1	940	10.3	-2.0
• Jet	660	7.2	-0.8	655	7.2	0.0
• Westfalen	230	2.5	0.0	230	2.5	-2.8
• Other street gas stations	2,840	31.1	0.4	2,850	31.2	1.1
BAB-Gas station (motorway)	430	4.7	0.0	430	4.7	2.0
Total	**9,145**	**100.0**	**-0.2**	**9,125**	**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

Street gas stations – Regions

	Number of stores*					Sales**
	01.01.2019		20:19	01.01.2019		19:18
	abs.	%	%	abs.	%	%
North-West	1,245	14.3	-1.2	1,230	14.2	-1.2
North Rhine-Westphalia	1,865	21.4	-0.3	1,860	21.4	-1.0
Central	1,245	14.3	-0.4	1,240	14.3	-0.6
Baden-Wuerttemberg	1,255	14.4	-0.4	1,250	14.4	0.0
Bavaria	1,670	19.2	0.0	1,670	19.2	-0.3
North-East	640	7.3	0.8	645	7.4	-0.6
Thuringia/Saxony	585	6.7	0.0	585	6.7	-0.3
Berlin	210	2.4	0.0	210	2.4	-0.5
Total Germany	**8,715**	**100.0**	**-0.3**	**8,690**	**100.0**	**-0.6**
• West	7,280	83.5		7,250	83.4	
• East	1,435	16.5		1,440	16.6	

* 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

- 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
- Bodycare
- OTC
- Detergents, Cleansers and Cleaning Agents
- Petfood

InfoScan

- Classic retail grocery stores
  - Stores up to 199 m²
  - Hypermarkets 200-799 m²
  - Hypermarkets > 800 m²
  - Discounters
  - Brand-Name Discounters
  - Classic Discounters (Aldi, Norma Lidl)
- Drugstores
- 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 + Amazon; no NAD available*

Basic data – Germany

Population	83.2 M.
German	72.8 M.
Non-German	10.4 M.
Private households	40.77 M.
Private German households	36.07 M.
Private non-German households	4.70 M.
Retail grocery stores (excl. Aldi)	30,130

Population/Households: GfK-Prognosis 01.01.2020

Basic data – Germany

	Population			Area	Inhabitants
	in thousands	in million	percentage	in sq km	per sq km
North-West	13,426	13.4	16.1	64,689	208
North Rhine-Westphalia	17,947	17.9	21.6	34,112	526
Central	11,369	11.4	13.7	43,545	261
Baden-Wuerttemberg	11,100	11.1	13.3	35,748	311
Bavaria	13,125	13.1	15.8	70,542	186
North-East	6,325	6.3	7.6	73,403	86
Thuringia/Saxony	6,205	6.2	7.5	34,652	179
Berlin	3,669	3.7	4.4	891	4,118
Total Germany	**83,167**	**83.2**	**100.0**	**357,582**	**233**
• West	66,967	67.0	80.5	248,636	269
• East	16,200	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	4,845	16.1	25.435	17.6	13,426	16.1	2,771	0.36
North Rhine-Westphalia	5,800	19.2	30.100	20.8	17,947	21.6	3,094	0.32
Central	4,130	13.7	19.205	13.3	11,369	13.7	2,753	0.36
Baden-Wuerttemberg	3,590	11.9	19.030	13.2	11,100	13.3	3,092	0.32
Bavaria	5,080	16.9	20.230	14.0	13,125	15.8	2,584	0.39
North-East	3,030	10.1	12.795	8.9	6,325	7.6	2,087	0.48
Thuringia/Saxony	2,840	9.4	11.770	8.1	6,205	7.5	2,185	0.46
Berlin	815	2.7	5.985	4.1	3,669	4.4	4,502	0.22
Total Germany	**30,130**	**100.0**	**144.550**	**100.0**	**83,167**	**100.0**	**2,760**	**0.36**
• West	23,445	77.8	114.000	78.9	66,967	80.5	2,856	0.35
• East	6,685	22.2	30.550	21.1	16,200	19.5	2,423	0.41

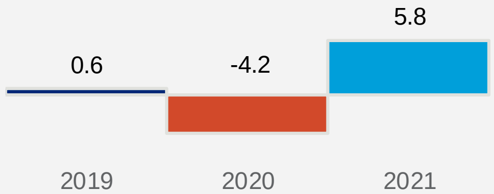
- North-West: Schleswig-Holstein, Hamburg, Lower Saxony, Bremen
- Central: Hesse, Rhineland-Palatinate, Saarland
- North-East: Mecklenburg-Western Pomerania, Brandenburg, Saxony-Anhalt

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

Economic key data – Germany

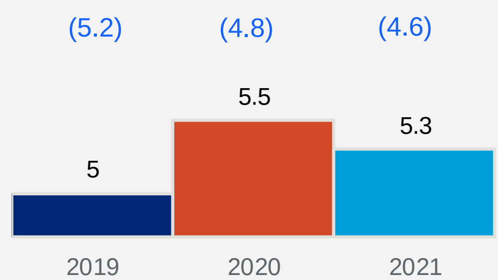
Economic growth

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



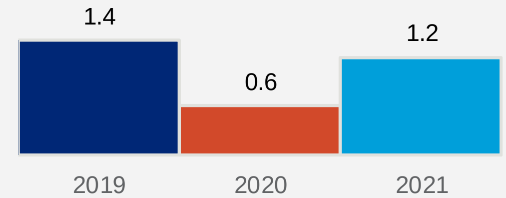
Employment market

Unemployment in million
(rate in %)*



Price development

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



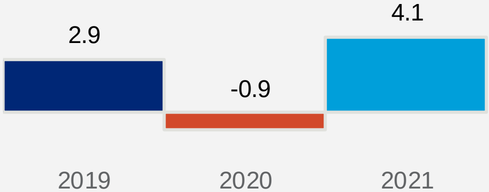
* Share of unemployed compared to domestic employable persons (residency concept)

Source: Project Group „Gemeinschaftsdiagnose“ Joint Economic Forecast Spring Report 2020; (as of: 08.04.2020)

Economic key data – Germany

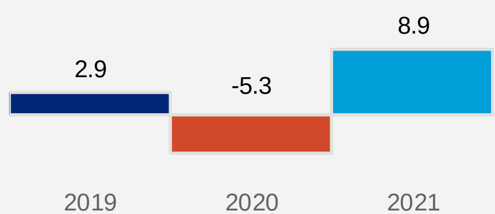
Income

Nominal change in disposable income (compared to previous year in %)



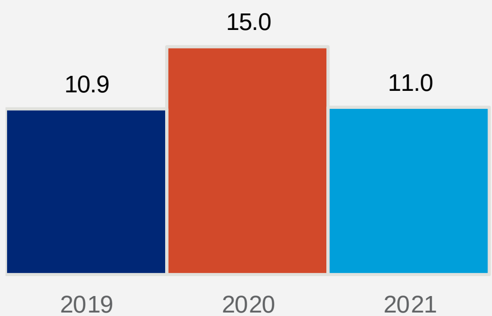
Private consumption

Nominal change in private consumption (compared to previous year in %)



Private savings

Share (in %) of private savings in disposable income (savings rate)



Source: Project Group „Gemeinschaftsdiagnose“ Joint Economic Forecast Spring Report 2020; (as of: 08.04.2020)

THANK YOU!

For More Information, Contact Us…

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