Universes 2017

Germany

Updated: September 2017

Contents

Contents

Introduction

This Universes 2017 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 2016/2017 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

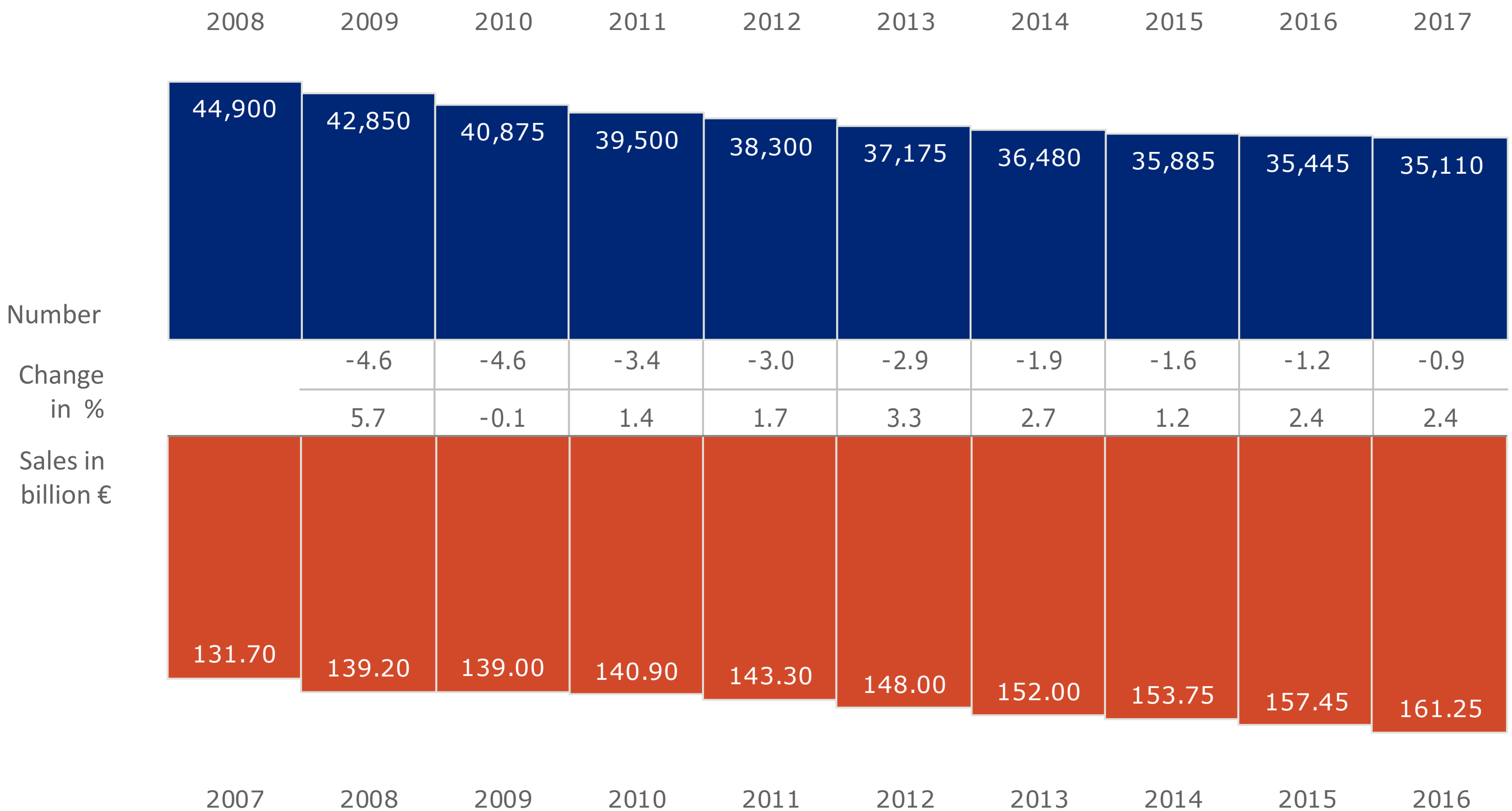
Value sales in the grocery class of trade (incl. Aldi) increased by 2.4% to €161.25bn in 2016.

The number of stores in Germany continues to decline; in total, the number of stores decreased by 0.9%. This decline is driven by the continuing negative trend among smaller traditional grocery stores. The number of discounters has hardly changed. At the end of 2016, Germany had a total of 35,110 grocery stores with Aldi itself ending the year with a total of 4,185 stores nationwide.

The causes for this trend are plain to see: A relentless price war, the continuing expansion of selling space and the reluctance of consumers to spend are the critical factors in an already difficult competitive environment. Revenue growth could only be realized by means of driving out competition.

As always, this 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)

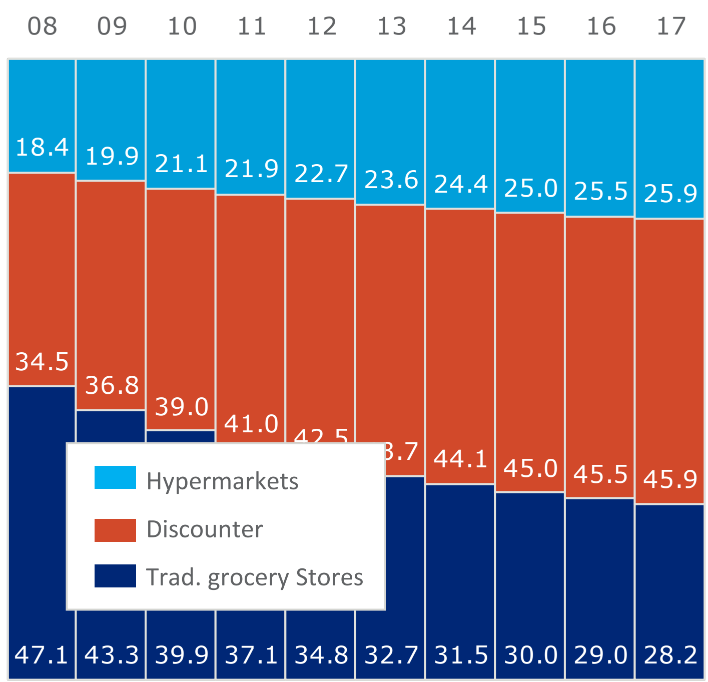
Discounters are self-service stores carrying mainly groceries in a limited range with emphasis on low prices. They have only basic furnishing and central check-outs. The most important representatives of this type of stores are Aldi, Lidl, Netto, Norma, Penny.

Traditional grocery stores

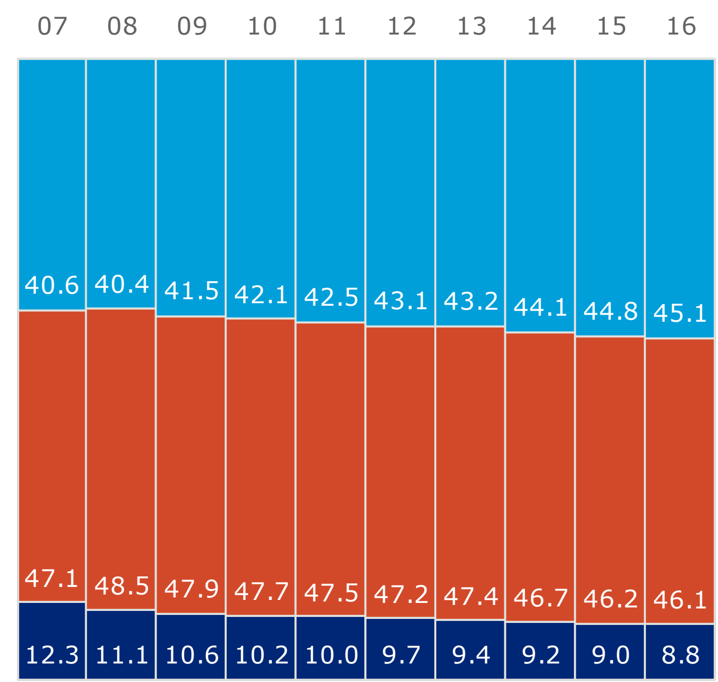
Outlets of the traditional retail food trade are stores with a range of goods consisting mainly of groceries. Stores of this type are neither hypermarkets nor discounters. Specialty shops offering groceries on the side are excluded (e.g. bakeries, confectioneries etc.).

Store types – incl. Aldi

Number of stores in %



Sales share in %



Ret. groc. trade

No. / € in bn

Change in %

	08	09	10	11	12	13	14	15	16	17
No.	44,900	42,850	40,875	39,500	38,300	37,175	36,480	35,885	35,445	35,110
Change in %		-4.6	-4.6	-3.4	-3.0	-2.9	-1.9	-1.6	-1.2	-0.9

	07	08	09	10	11	12	13	14	15	16
€ in bn	131.70	139.20	139.00	140.90	143.30	148.00	152.00	153.75	157.45	161.25
Change in %		5.7	-0.1	1.4	1.7	3.3	2.7	1.2	2.4	2.4

Hypermarkets – Development

Hypermarkets were among the winners in Total Grocery in 2016 again.

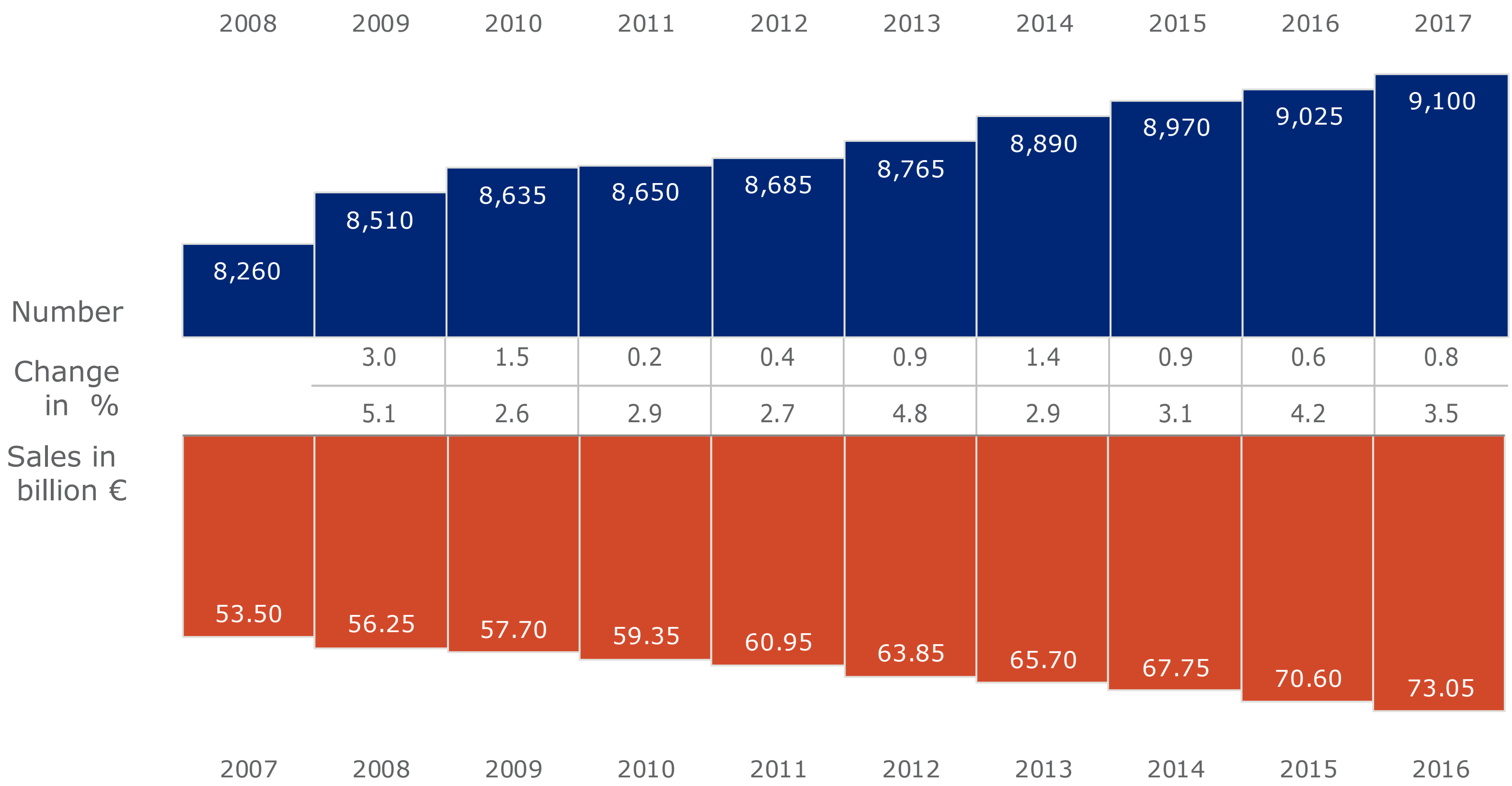
Due to the openings and selling space expansions the number of stores increased to 9,100. Nevertheless, it should be noted that 53.3% of the hypermarkets sales volume is generated by the smaller markets (selling spaces ranging from 800 to 1,499 sq m or from 1,500 to 2,499 sq m), which account for 77.7% of all hypermarkets.

Value sales increased to €73.05bn in 2016; hence the average turnover for hypermarkets slightly increased to €8m as well.

Regional distribution of hypermarkets at the end of 2016, by IRI regions:

• North-West	1,740	(+ 0.9%)
• North Rhine-Westphalia	1,845	(– 0.3%)
• Central	1,350	(+ 1.1%)
• South	2,595	(+ 1.6%)
• East	1,570	(+ 0.6%)
• Total:	9,100	(+ 0.8%)

Hypermarkets



Discounters – Development incl. Aldi

Discounters – positive performance in 2016

The number of stores remains virtually unchanged. Value sales increased by 2.3% to €74.41bn.

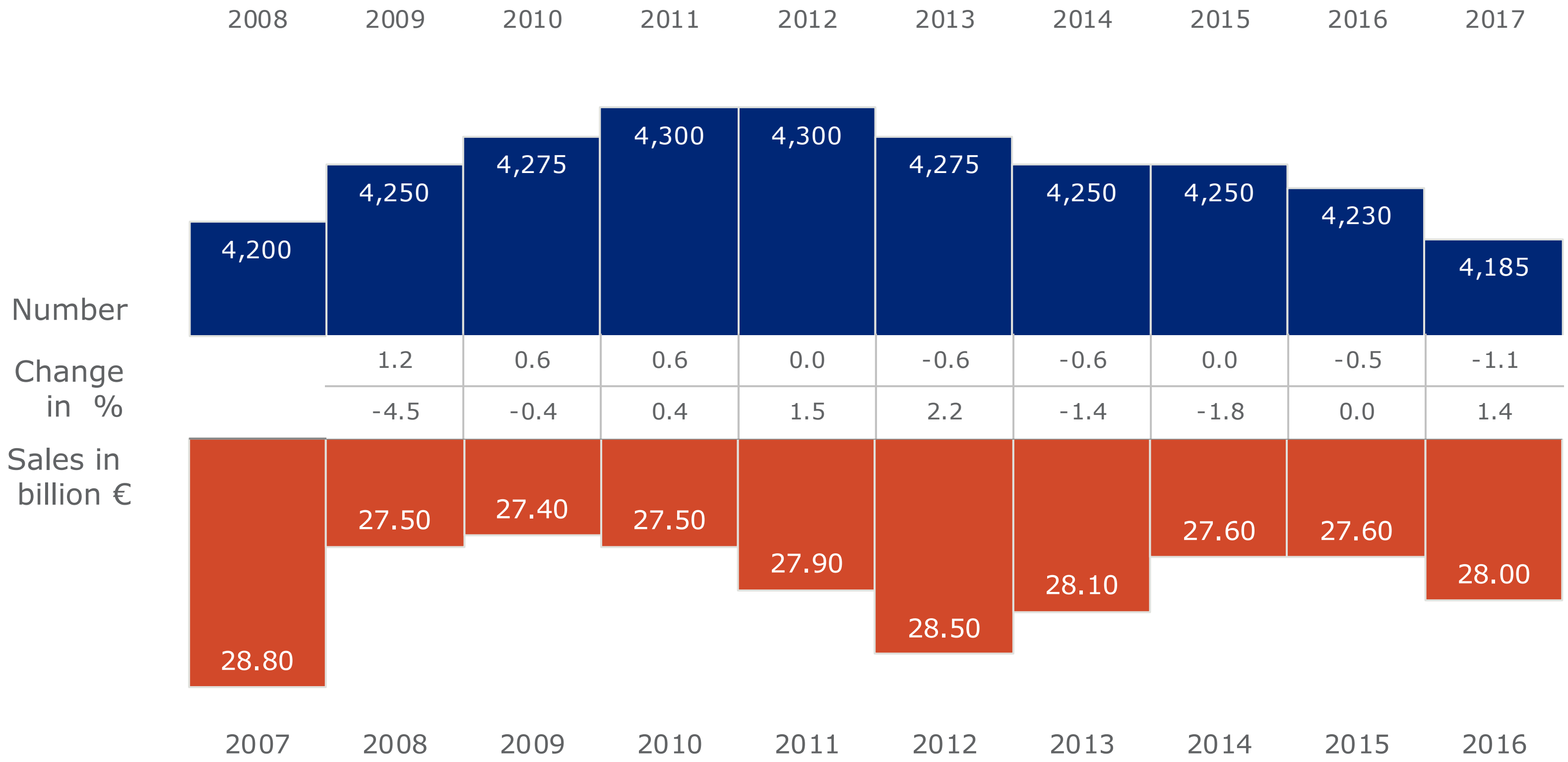
In 2016 this store type represents a value share of 46.1% of total grocery, which puts discounters even ahead of traditional grocery.

When Aldi is not included, discounters nowadays represent 28.8% of the total grocery value sales in Germany (€161.25bn).

Regional distribution of discounters (incl. Aldi) at the end of 2016, East vs West:

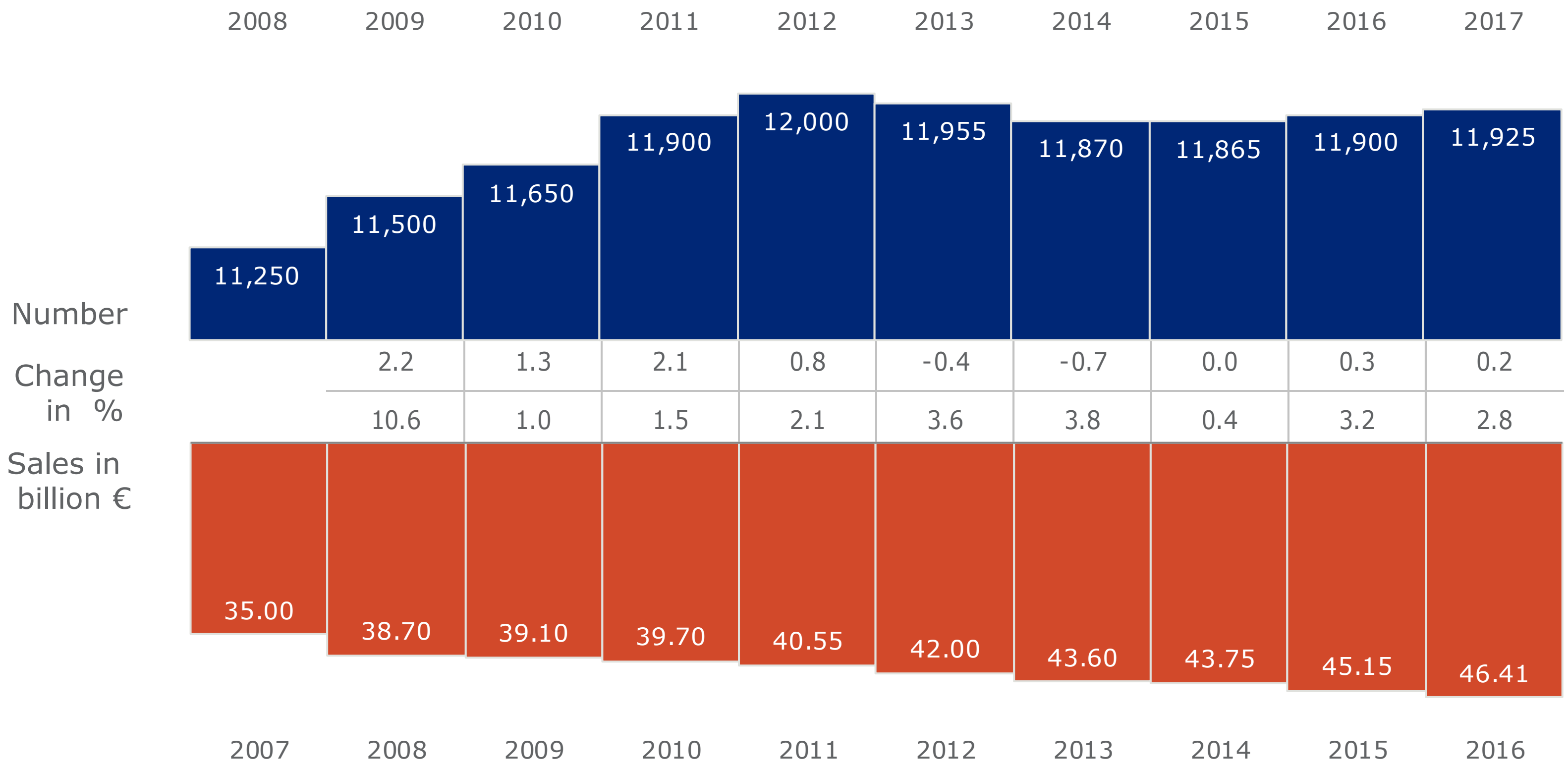
• West	11,995	(0.0%)
• East	4,115	(– 0.5%)
• Total	16,110	(– 0.1%)

Aldi



* co-operation partner GfK: FOOD-Sales exclusively

Discounters – excl. Aldi



Back to Contents

Discounters

		Discounters incl. Aldi		Discounters excl. Aldi	
		Number 01.01.2017	Sales 2016	Number 01.01.2017	Sales 2016
		16,110	**74.41**	**11,925**	**46.41**
Company	**Name**	Share in %		Share in %	
Classic Discounters					
Aldi	Aldi	26	38		
Lidl & Schwarz	Lidl	21	24	27	38
Norma	Norma	8	5	11	9
Brand Name Discounters					
Penny	Penny	13	11	18	17
Netto North/South	Netto	28	20	38	33
Edeka Retailers	Diska, NP, Treff	4	2	6	3

Traditional grocery stores – Development

Number of Outlets and Value Sales continue to decline

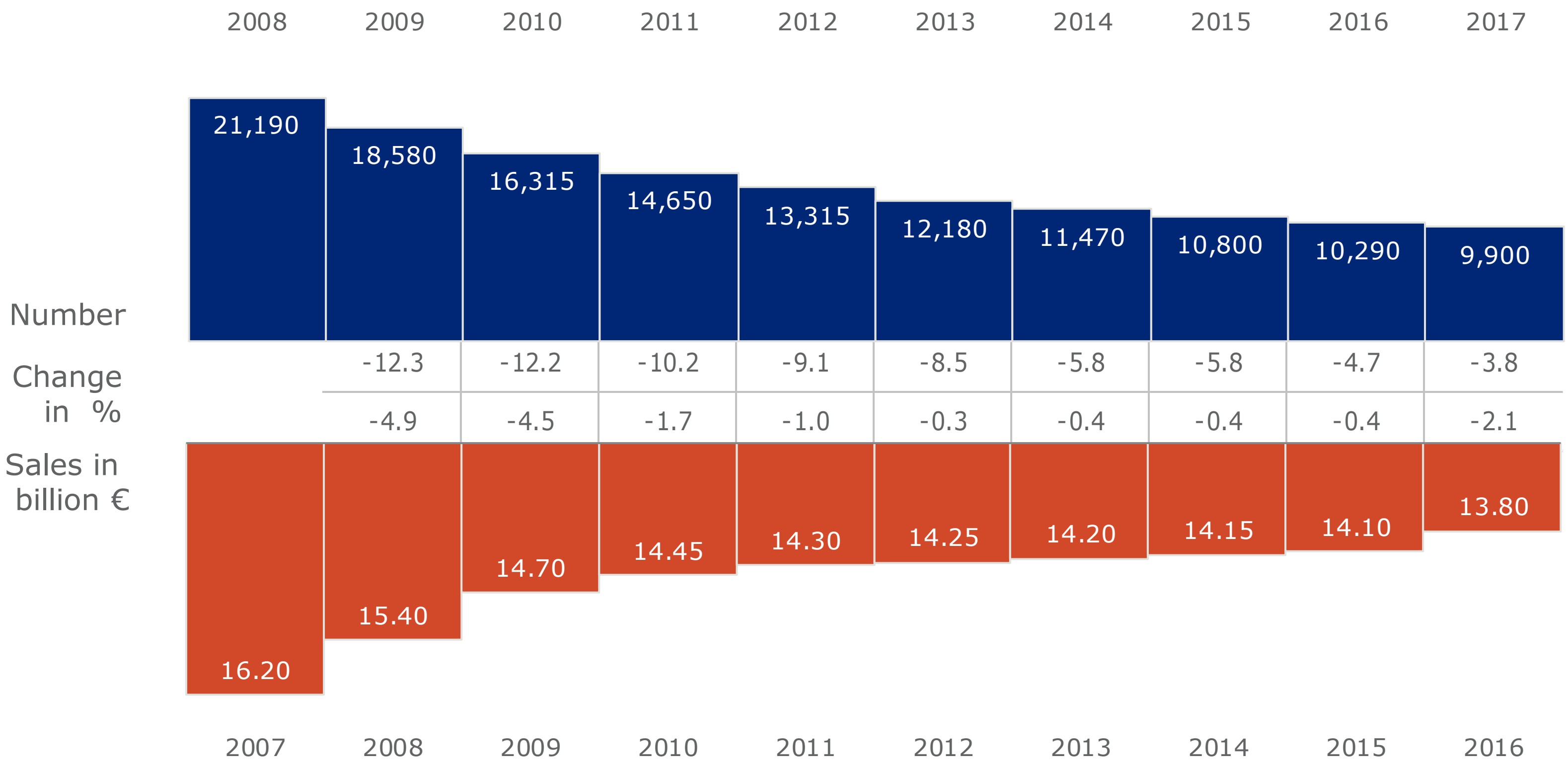
The number of traditional grocery stores in all surface size classes (up to 199 sq m, 200 to 399 sq m and 400 to 799 sq m) declined. The number of stores in the largest category (up to 199 sq m) decreased by 5.3 %.

The entire traditional grocery store category again suffered losses in value sales in 2016. Sales fell by 2.1% to €13.80bn. Traditional grocery stores thus account for only 10.3% of total retail grocery sales (excl. Aldi).

Regional distribution of traditional grocery stores at the end of 2016, East vs West:

• West	7,950	(– 3.9%)
• East	1,950	(– 3.5%)
• Total	9,900	(– 3.8%)

Traditional grocery stores



Store types – excl. Drugstores

	Number of stores					Sales in billion				
	01.01.2016		17:16	01.01.2017		2015		16:15	2016	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Hypermarkets	9,025	28.9	0.8	9,100	29.4	70.62	54.4	3.5	73.07	54.8
Discounters	11,900	38.1	0.2	11,925	38.6	45.15	34.8	2.8	46.41	34.8
Traditional grocery stores	10,290	33.0	-3.8	9,900	32.0	14.08	10.8	-2.2	13.77	10.4
Total	**31,215**	**100.0**	**-0.9**	**30,925**	**100.0**	**129.85**	**100.0**	**2.6**	**133.25**	**100.0**
Aldi	4,230		-1.1	4,185		27.60		1.4	28.00	

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).

While both the traditional grocery store categories and the discounters suffered losses in terms of number of stores, the hypermarkets could expand further.

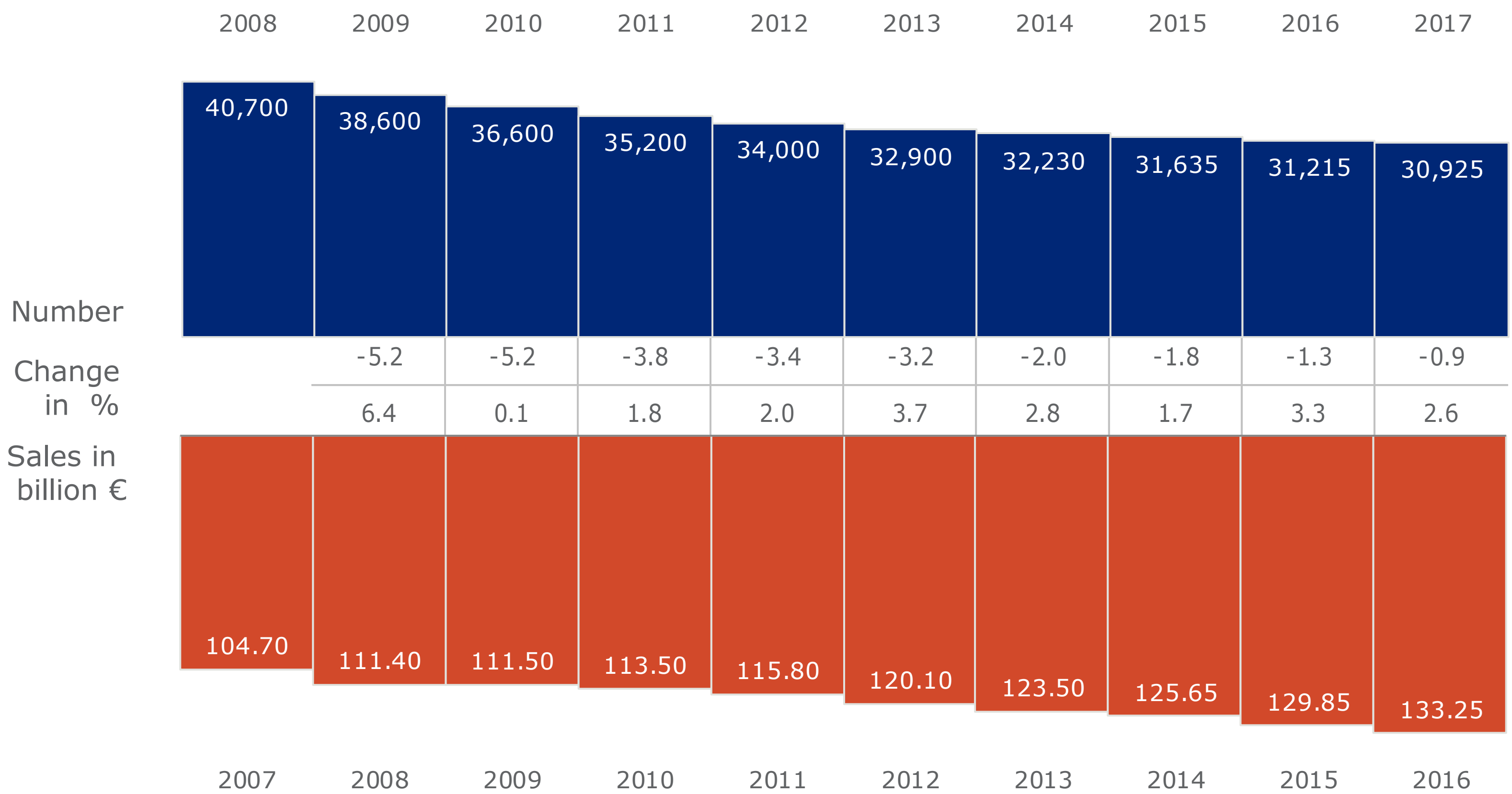
Selling space categories – incl. Aldi

	Number of stores					Sales in billion €				
	01.01.2016		17:16	01.01.2017		2015		16:15	2016	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
up to 199 sq m	4,260	12.0	-5.3	4,035	11.5	1.450	0.9	-3.4	1.400	0.9
200 to 399 sq m	2,750	7.8	-2.7	2,675	7.6	2.770	1.8	-1.1	2.740	1.7
400 to 799 sq m	3,280	9.3	-2.7	3,190	9.1	9.860	6.3	-2.3	9.630	6.0
800 to 1499 sq m	4,335	12.2	-0.9	4,295	12.2	20.180	12.8	2.9	20.760	12.9
1500 to 2499 sq m	2,675	7.5	3.7	2,775	7.9	17.490	11.1	4.2	18.220	11.2
2500 to 4999 sq m	1,340	3.8	1.5	1,360	3.9	15.600	9.9	3.8	16.190	10.0
5000 sq m or more	675	1.9	-0.7	670	1.9	17.350	11.0	3.2	17.900	11.1
Discounters excl. Aldi	11,900	33.6	0.2	11,925	34.0	45.150	28.7	2.8	46.410	28.8
Aldi	4,230	11.9	-1.1	4,185	11.9	27.600	17.5	1.4	28.000	17.4
Total	**35,445**	**100.0**	**-0.9**	**35,110**	**100.0**	**157.450**	**100.0**	**2.4**	**161.250**	**100.0**

Selling space categories – excl. Aldi

	Number of stores					Sales in billion €				
	01.01.2016		17:16	01.01.2017		2015		16:15	2016	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
up to 199 sq m	4,260	13.6	-5.3	4,035	13.0	1.450	1.1	-3.4	1.400	1.1
200 to 399 sq m	2,750	8.8	-2.7	2,675	8.6	2.770	2.1	-1.1	2.740	2.1
400 to 799 sq m	3,280	10.5	-2.7	3,190	10.3	9.860	7.6	-2.3	9.630	7.1
800 to 1499 sq m	4,335	13.9	-0.9	4,295	13.9	20.180	15.5	2.9	20.760	15.6
1500 to 2499 sq m	2,675	8.6	3.7	2,775	9.0	17.490	13.5	4.2	18.220	13.7
2500 to 4999 sq m	1,340	4.3	1.5	1,360	4.4	15.600	12.0	3.8	16.190	12.2
5000 sq m or more	675	2.2	-0.7	670	2.2	17.350	13.4	3.2	17.900	13.4
Discounters excl. Aldi	11,900	38.1	0.2	11,925	38.6	45.150	34.8	2.8	46.410	34.8
Total	**31,215**	**100.0**	**-0.9**	**30,925**	**100.0**	**129.850**	**100.0**	**2.6**	**133.250**	**100.0**

Total retail food trade – excl. Aldi

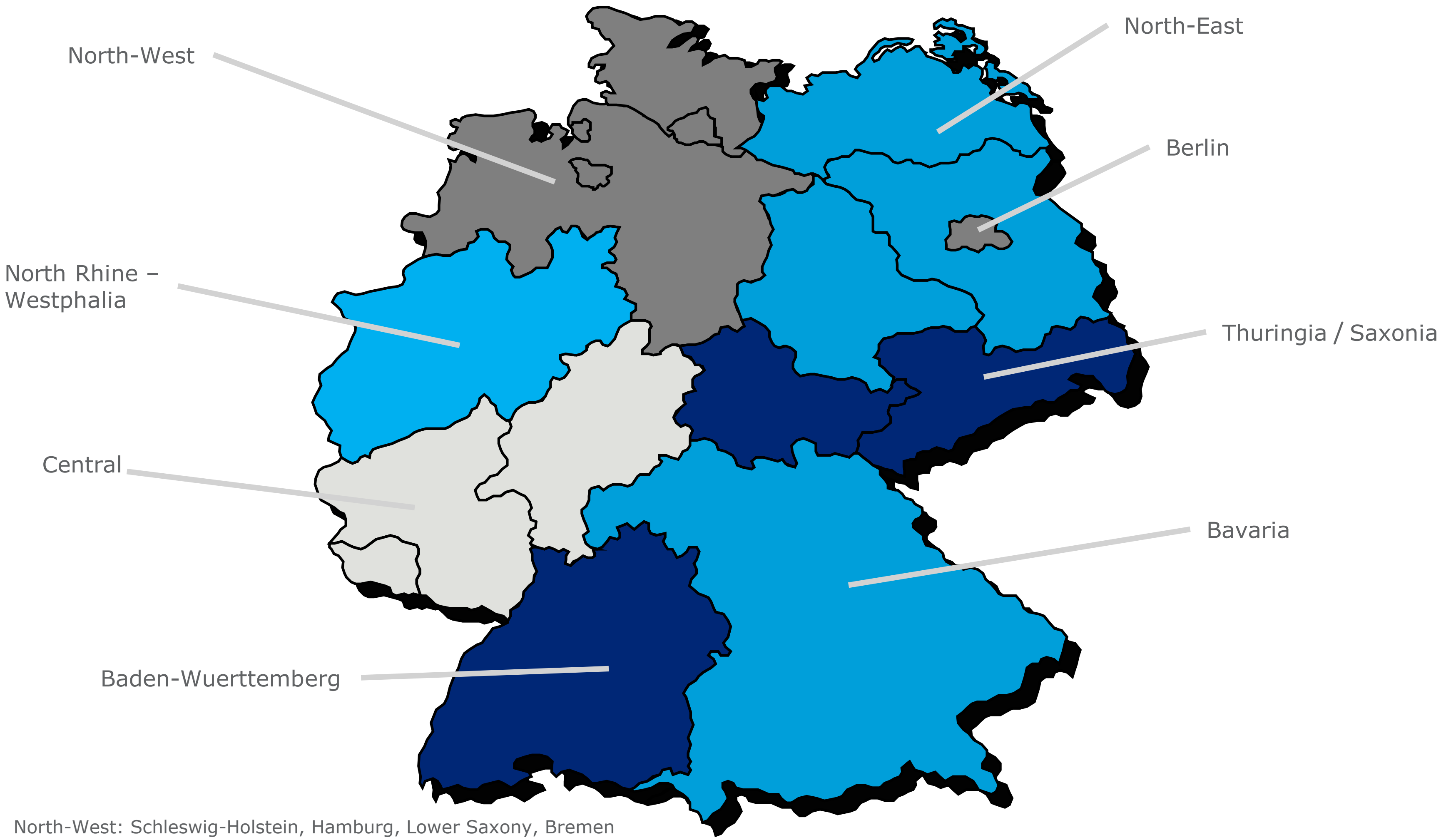


Regions – excl. Aldi

	Number of stores					Sales in billion €				
	01.01.2016		17:16	01.01.2017		2015		16:15	2016	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
North-West	4,985	16.0	-0.6	4,955	16.0	22.730	17.5	2.6	23.320	17.5
North Rhine-Westphalia	5,960	19.1	-1.0	5,900	19.1	26.865	20.7	2.6	27.570	20.7
Central	4,380	14.0	-1.0	4,335	14.0	17.660	13.6	2.6	18.120	13.6
Baden-Wuerttemberg	3,760	12.0	-1.1	3,720	12.0	17.010	13.1	2.6	17.460	13.1
Bavaria	5,205	16.7	-0.9	5,160	16.7	18.185	14.0	2.6	18.660	14.0
North-East	3,075	9.9	-0.5	3,060	9.9	11.420	8.8	2.6	11.720	8.8
Thuringia/Saxony	3,005	9.6	-2.0	2,945	9.6	10.640	8.2	2.6	10.920	8.2
Berlin	845	2.7	0.6	850	2.7	5.340	4.1	2.6	5.480	4.1
Total Germany	**31,215**	**100.0**	**-0.9**	**30,925**	**100.0**	**129.850**	**100.0**	**2.6**	**133.250**	**100.0**

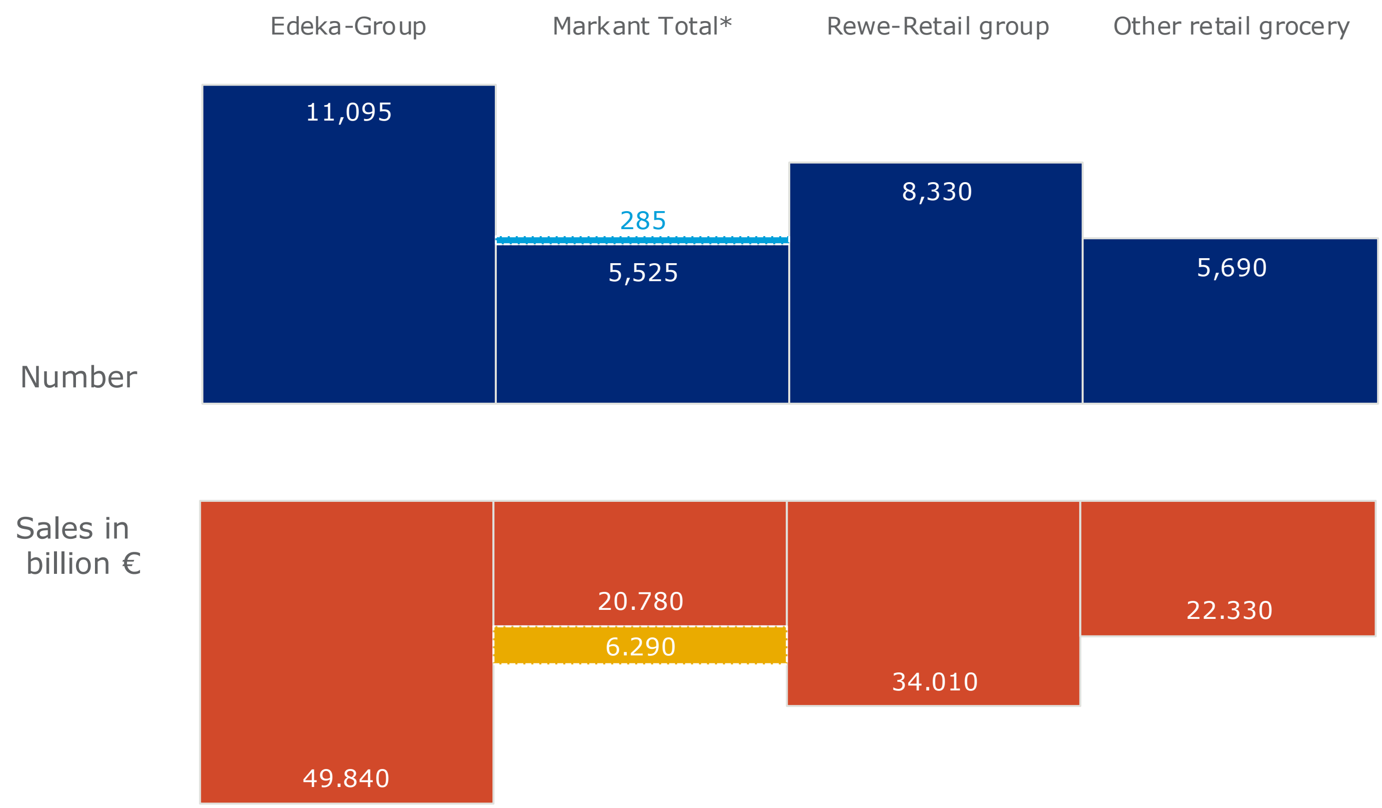
- North-West: Schleswig-Holstein, Hamburg, Lower Saxony, Bremen
- Central: Hesse, Rhineland-Palatinate, Saarland
- North-East: Mecklenburg-Western Pomerania, Brandenburg, Saxony-Anhalt

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 285 real,- sales outlets with value sales of €6.29 bn.

Key-Accounts – excl. Aldi, drugstores

Average sales per store in million €	2016
Edeka-Group	4.49
• Retailers	5.27
• Affiliated companies/Cooperations	3.36
Markant Total	4.66
• Markant ex. real,-	3.76
• real,- (formerly Metro Einzelhandel)	22.07
Rewe Retail Group	4.08
Other retail grocery	3.92
Total	**4.31**

Key-Accounts – excl. Aldi, drugstores

	Number of stores		Sales in billion €		Number of stores > 200 m²		Sales in billion €	
	01.01.2017		2016		01.01.2017		2016	
	abs.	%	billion €	%	abs.	%	billion €	%
Edeka-Group	11,095	35.9	49.840	37.4	9,445	35.2	49.145	37.3
• Retailers	6,560	21.2	34.600	26.0	4,910	18.3	33.905	25.7
• Affiliated companies/Coop.	4,535	14.7	15.240	11.4	4,535	16.9	15.240	11.6
Markant Total	5,810	18.8	27.070	20.3	4,310	16.1	26.595	20.2
• Markant ex. real,-	5,525	17.9	20.780	15.6	4,025	15.0	20.305	15.4
• real,- (formerly Metro Einzelhandel)	285	0.9	6.290	4.7	285	1.1	6.290	4.8
Rewe Retail Group	8,330	26.9	34.010	25.5	7,810	28.9	33.850	25.6
Other retail grocery	5,690	18.4	22.330	16.8	5,325	19.8	22.260	16.9
Total	**30,925**	**100.0**	**133.250**	**100.0**	**26,890**	**100.0**	**131.850**	**100.0**

Back to Contents

Key-Accounts – excl. Aldi, incl. drugstores

	Number of stores		Sales in billion €		Number of stores > 200 m²		Sales in billion €	
	01.01.2017		2016		01.01.2017		2016	
	abs.	%	billion €	%	abs.	%	billion €	%
Edeka-Group	11,095	31.2	49.840	33.4	9,445	30.0	49.145	33.2
• Retailers	6,560	18.4	34.600	23.2	4,910	15.6	33.905	22.9
• Affiliated companies/Coop.	4,535	12.8	15.240	10.2	4,535	14.4	15.240	10.3
Markant Total	10,445	29.4	43.030	28.8	8,945	28.3	42.555	28.8
• Markant ex. real,-	10,160	28.6	36.740	24.6	8,660	27.4	36.265	24.5
• real,- (formerly Metro Einzelhandel)	285	0.8	6.290	4.2	285	0.9	6.290	4.3
Rewe Retail Group	8,330	23.4	34.010	22.8	7,810	24.8	33.850	22.9
Other retail grocery	5,690	16.0	22.330	15.0	5,325	16.9	22.260	15.1
Total	**35,560**	**100.0**	**149.210**	**100.0**	**31,525**	**100.0**	**147.810**	**100.0**
of which drugstores	4,635		15.960		4,635		15.960	

Back to Contents

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�much share of value sales is 37.4%.

Development of Edeka Retailers

Edeka Retailers are split into seven 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 6,560 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 €34.600bn and shows a share of 26%.

Edeka Group – Definition and development

Development of Edeka Affiliates and Cooperations

Frey and Kissel, both Netto South and Netto North are summarized in this key account group.

They add up to 4,535 stores representing value sales of €15.24bn.

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	Type	Sales channels
Hypermarkets	E-aktiv Markt	Trad. Grocery Stores	E-aktiv Markt
	E-Center		Edeka
	E-Center Herkules		E-neukauf
	Edeka		Feneberg
	E-Neukauf		Kupsch
	E-Reichelt		Lüning
	Kaufmarkt		Nah & Gut
	Kupsch		
	Marktkauf	Drugstores	-
Discounters	Diska		
	NP		
	Treff		

Edeka Group – Organizational Classification and Sales channels

Company	Headquarters	Type	Sales channels
h) Edeka-Aff. Comp./Coop.		Hypermarkets	SBK
Frey & Kissel	Landau	Discounters	Netto
Netto Markendiscount	Maxhütte		
Netto Supermarkt	Stavenhagen	Trad. Grocery Stores	SBK compact
		Drugstore	-

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 5,810 retail food stores, which attained sales of €27.07bn. With those figures Markant is the third largest key account group in terms of sales after Edeka and Rewe.

Among the activities of the companies organized in this group the continued expansion of Kaufland is particularly worth mentioning. Drugstore operators all charge via Markant.

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

With 285 sales outlets, former Metro Retailers account for sales of €6.29bn.

Metro Cash & Carry charges via Markant starting from 2016 as well.

Markant – Organizational Classification

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

Markant – Sales Channels

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

Back to Contents

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 8,330 outlet stores generated a sales volume of €34.010bn. This results in a share of 25.5% 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
Coop	Kiel		Kaufpark		
Dohle	Siegburg		Rewe	Trad. Grocery Stores	Rewe
Penny	Cologne		Rewe Center		Nahkauf
Petz	Wissen		Sky		
Rewe Dortmund	Dortmund		Wasgau		
Rewe Zentrale	Cologne			Drugstores	—
Wasgau	Pirmasens				

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 was reduced, whereas sales value increased by 3.2% 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 €22.330bn they account for 16.8% of total retail grocery sales.

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.

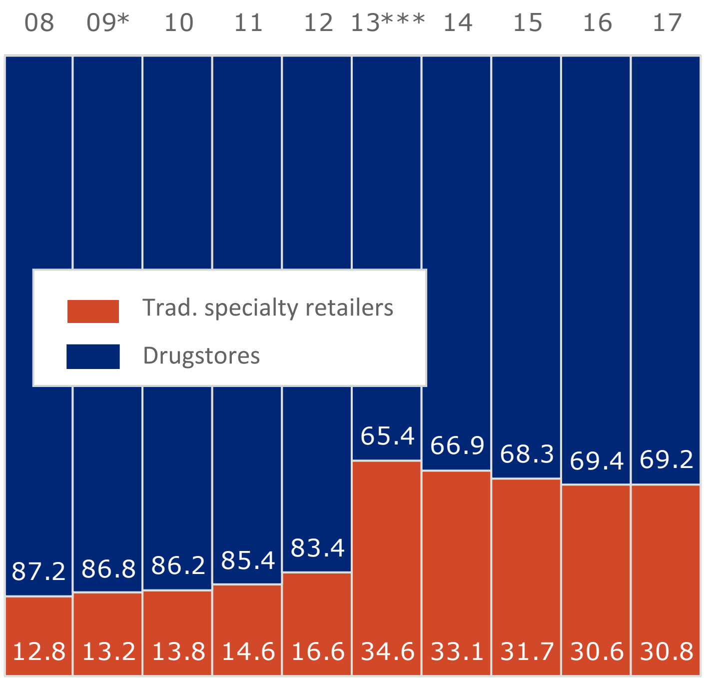
Specialty Perfumeries: Affiliated or non-affiliated stores with sales almost exclusively from the depot cosmetics area offering a marginal range of other products.

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.

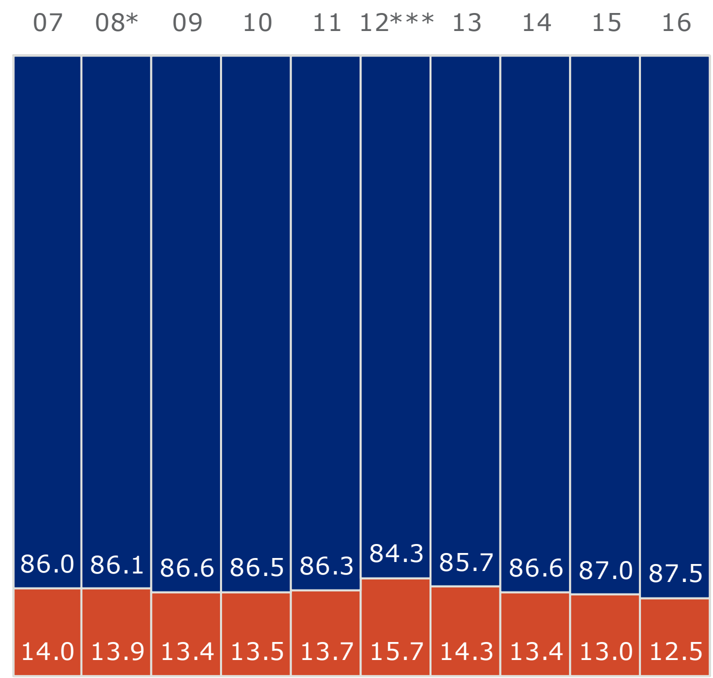
Drugstores/Perfumeries and specialized retailers* – excl. Chain Department Stores

Number of stores in %



	08	09*	10	11	12	13***	14	15	16	17
Ret. groc. trade No.	16,290	15,890	15,015	14,045	12,290	5,890	6,005	6,245	6,450	6,700
Change in %		-2.5	-5.5	-6.5	-12.5	-52.1	2.0	4.0	3.3	3.8

Sales share in % **



	07	08*	09	10	11	12***	13	14	15	16
Ret. groc. trade € in bn	14.48	14.80	15.14	15.26	15.64	13.94	15.29	16.35	17.41	18.24
Change in %		2.2	2.3	0.8	2.5	-10.8	9.9	6.9	6.5	4.8

* 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 4.7% to €18.88bn versus year ago.

The number of discount drugstores increased by 160 stores to a total of 4,635 stores.

The discount drugstores reduced their share of total drug and specialty perfumery (excl. department stores, since 01.01.2009 excl. specialty drugstores) to 69.2% (year ago 69.4%), but increased their value share to 87.5% (year ago 87%).

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

• North-West	1,235
• North Rhine-Westphalia	1,510
• Central	905
• Baden-Wuerttemberg	845
• Bavaria	1,095
• North-East	445
• Thuringia/Saxonia	400
• Berlin	265
• Total	6,700

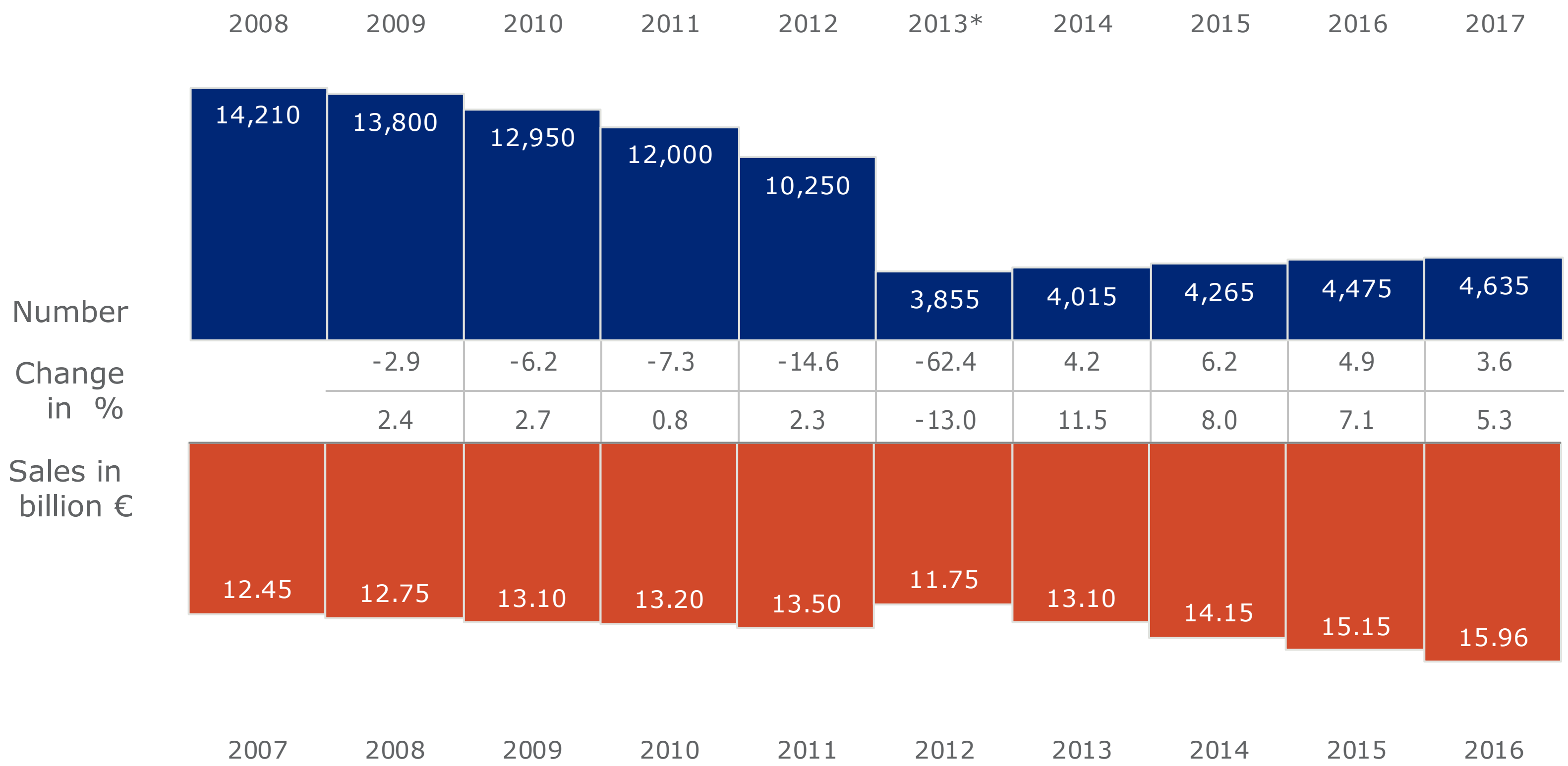
Drugstores/Perfumeries and specialized retailers

	Number of stores					Sales in billion €				
	01.01.2016		17:16	01.01.2017		2015		16:15	2016	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Spec. Perfumeries	1,975	29.8	4.6	2,065	30.0	2.260	12.5	0.9	2.280	12.1
Chain Department stores	180	2.7	0.0	180	2.6	0.630	3.5	1.6	0.640	3.4
Drugstores	4,475	67.5	3.6	4,635	67.4	15.150	84.0	5.3	15.960	84.5
Total	**6,630**	**100.0**	**3.8**	**6,880**	**100.0**	**18.040**	**100.0**	**4.7**	**18.880**	**100.0**

Drugstores

	Number 01.01.2017	Sales 2016
	4,635	€15.96bn
	Shares in %	
dm	40	47
Rossmann (incl. Kloppenburg)	44	38
Müller	12	12
Budnikowsky	4	3

Drugstores



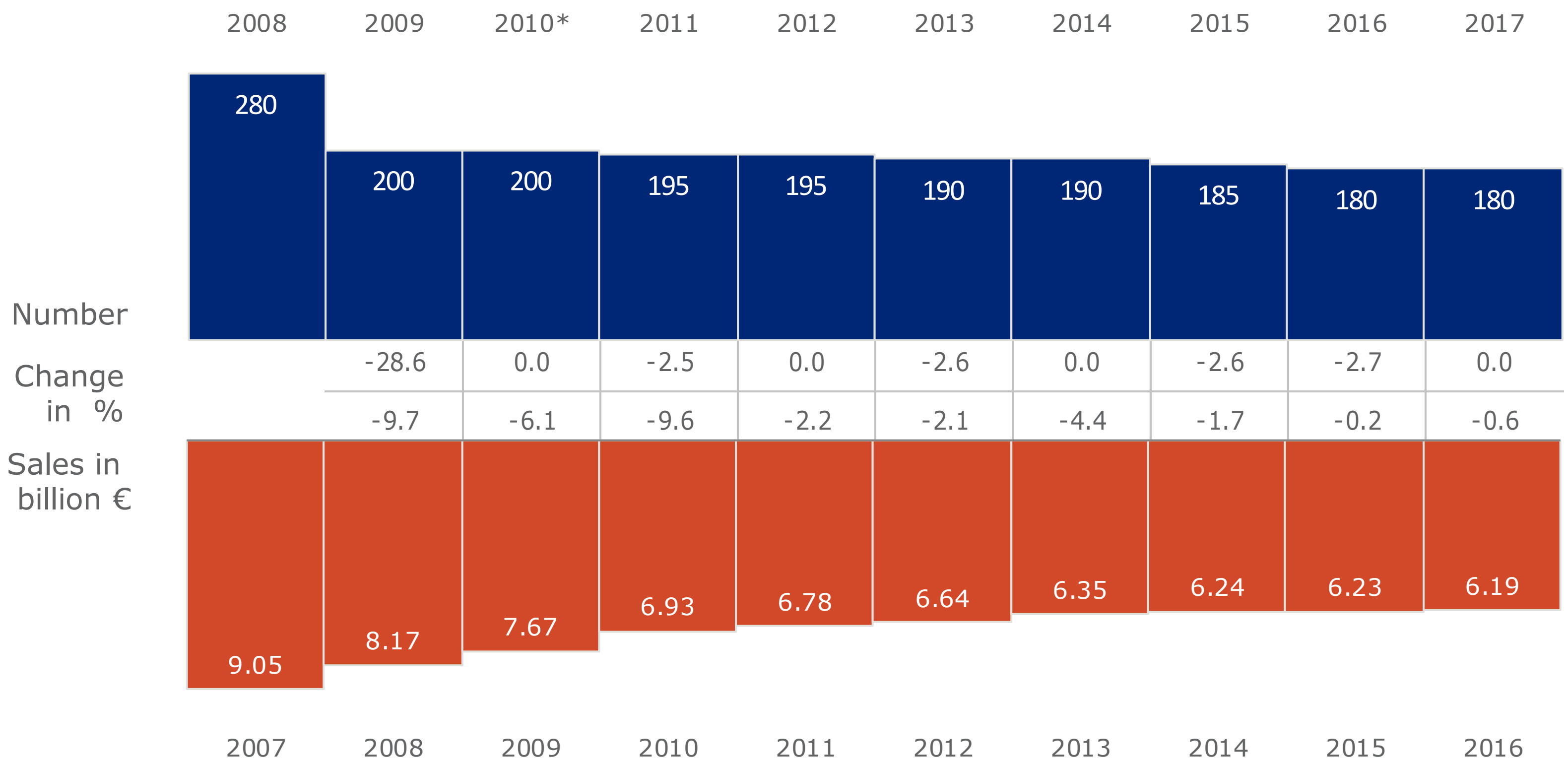
* Insolvency of Schlecker

Back to Contents

Store types – Total retail food trade and drugstores

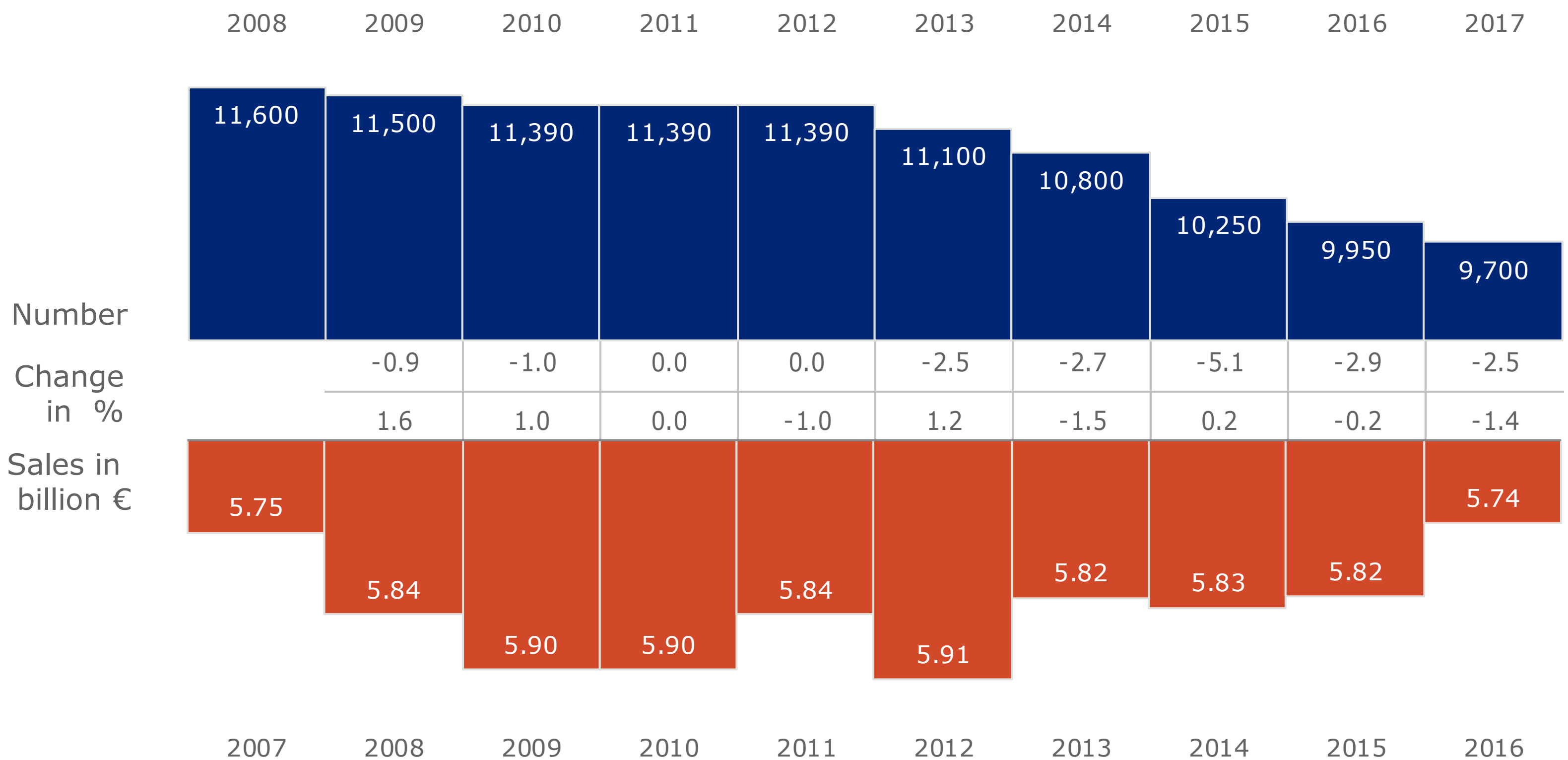
	Number of stores					Sales in billion				
	01.01.2016		17:16	01.01.2017		2015		16:15	2016	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Hypermarkets	9,025	22.6	0.8	9,100	22.9	70.62	40.9	3.5	73.07	41.2
Discounters	11,900	29.8	0.2	11,925	30.0	45.15	26.2	2.8	46.41	26.2
Trad. grocery stores	10,290	25.8	-3.8	9,900	24.9	14.08	8.1	-2.2	13.77	7.8
Aldi	4,230	10.6	-1.1	4,185	10.5	27.60	16.0	1.4	28.00	15.8
Drugstores	4,475	11.2	3.6	4,635	11.7	15.15	8.8	5.3	15.96	9.0
Total	**39,920**	**100.0**	**-0.4**	**39,745**	**100.0**	**172.60**	**100.0**	**2.7**	**177.21**	**100.0**

Department stores



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

Beverage specialty stores*



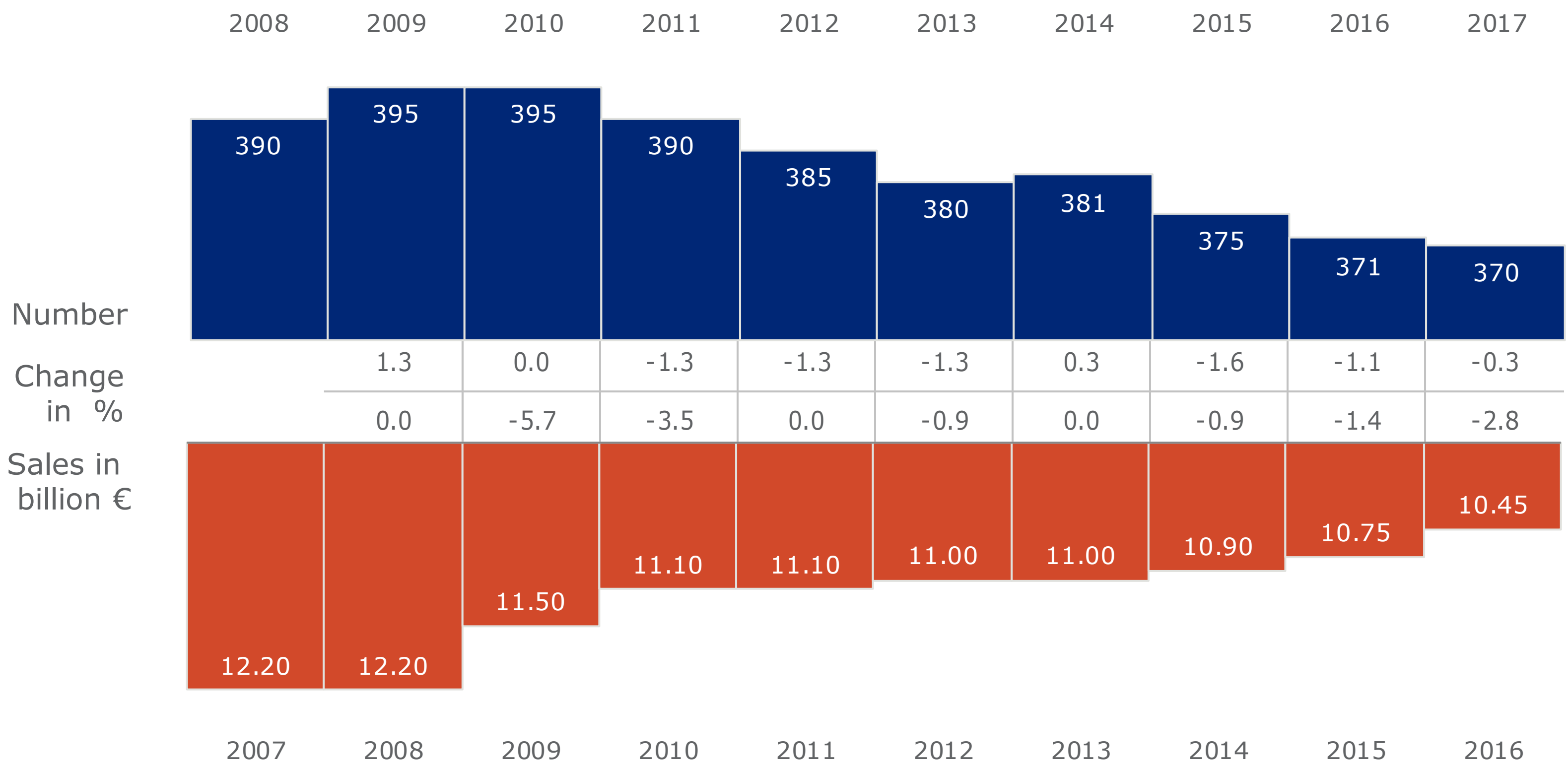
* Sales: Beer and Nonalcoholic beverages product categories

Beverage specialty stores – Regions

	Number of stores				
	01.01.2016		17:16	01.01.2017	
	abs.	%	%	abs.	%
North-West	960	9.6	-2.6	935	9.6
North Rhine-Westphalia	1,960	19.7	-2.6	1,910	19.7
Central	1,310	13.2	-2.7	1,275	13.2
Baden-Wuerttemberg	1,230	12.4	-2.4	1,200	12.4
Bavaria	2,140	21.5	-2.3	2,090	21.5
North-East	895	9.0	-2.8	870	9.0
Thuringia/Saxony	1,275	12.8	-2.4	1,245	12.8
Berlin	180	1.8	-2.8	175	1.8
Total Germany	**9,950**	**100.0**	**-2.5**	**9,700**	**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

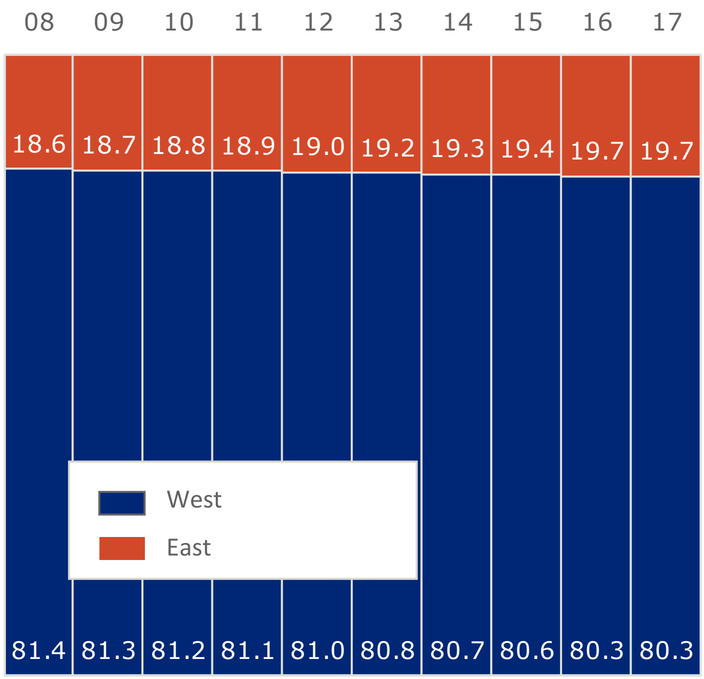

2008 2009 2010 2011 2012 2013 2014 2015 2016 2017
390 395 395 390 385 380 381 375 371 370
Number
Change in %
1.3 0.0 -1.3 -1.3 -1.3 0.3 -1.6 -1.1 -0.3
0.0 -5.7 -3.5 0.0 -0.9 0.0 -0.9 -1.4 -2.8
Sales in billion €
12.20 12.20 11.50 11.10 11.10 11.00 11.00 10.90 10.75 10.45
2007 2008 2009 2010 2011 2012 2013 2014 2015 2016

Total market (LEH + DM + Perfumeries + KWH + Aldi + C&C)

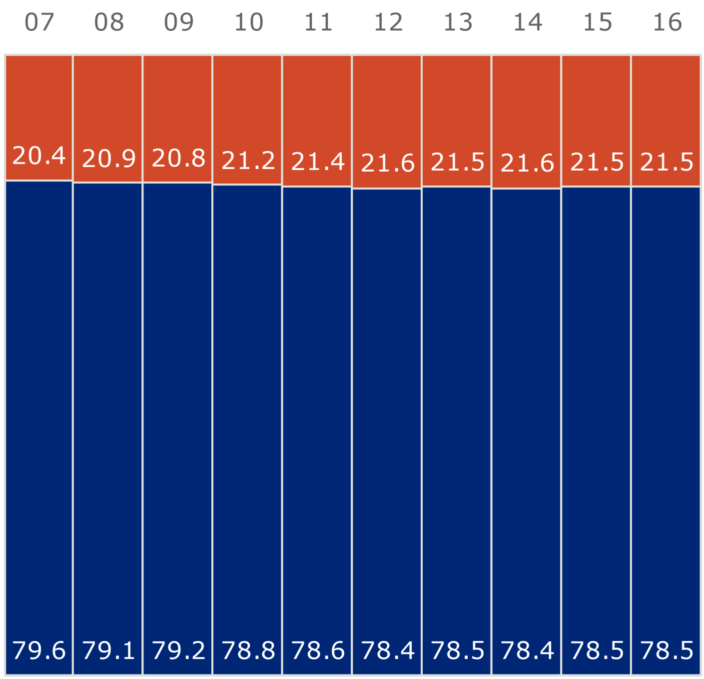
	Number of stores					Sales in billion €				
	01.01.2016		17:16	01.01.2017		2015		16:15	2016	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Hypermarkets	9,025	21.3	0.8	9,100	21.5	70.620	36.8	3.5	73.070	37.2
Discounters	11,900	28.0	0.2	11,925	28.2	45.150	23.5	2.8	46.410	23.7
Trad. grocery stores	10,290	24.2	-3.8	9,900	23.4	14.080	7.4	-2.2	13.770	7.0
Aldi	4,230	10.0	-1.1	4,185	9.9	27.600	14.4	1.4	28.000	14.3
Drugstores	4,475	10.5	3.6	4,635	10.8	15.150	7.9	5.3	15.960	8.1
Perfumeries	1,975	4.7	4.6	2,065	4.9	2.260	1.2	0.9	2.280	1.2
Chain department stores	180	0.4	0.0	180	0.4	6.230	3.2	-0.6	6.190	3.2
C&C Outlets	371	0.9	-0.3	370	0.9	10.750	5.6	-2.8	10.450	5.3
Total	**42,446**	**100.0**	**-0.2**	**42,360**	**100.0**	**191.840**	**100.0**	**2.2**	**196.130**	**100.0**

Pharmacies

Number of stores in %



Sales share in %



Ret. groc. trade

	08	09	10	11	12	13	14	15	16	17
No. / € in bn	21,579	21,581	21,576	21,481	21,333	21,181	20,963	20,902	20,317	20,153
Change in %		0.0	0.0	-0.4	-0.7	-0.7	-1.0	-0.3	-2.8	-0.8

	07	08	09	10	11	12	13	14	15	16
No. / € in bn	35.70	36.30	37.00	37.80	38.70	39.80	41.80	43.90	46.90	48.80
Change in %		1.7	1.9	2.2	2.4	2.8	5.0	5.0	6.8	4.1

Source: IMS Health, 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 four branch stores and independent supply retailers with selling space of over 300 sq m.

	Number of stores					Sales in billion €				
	01.01.2016		17:16	01.01.2017		2015		16:15	2016	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Freßnapf	870	57.8	1.1	880	57.9	1.119	66.0	5.8	1.184	66.5
Futterhaus	285	18.9	1.8	290	19.1	0.268	15.8	9.3	0.293	16.5
Petstores (excl. Freßnapf, Futterhaus)	350	23.3	0.0	350	23.0	0.308	18.2	-1.6	0.303	17.0
Total	**1,505**	**100.0**	**1.0**	**1,520**	**100.0**	**1.695**	**100.0**	**5.0**	**1.780**	**100.0**

Back to Contents

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 01.01.2017:

• Do-it-yourself stores	2,125
• 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**
	01.01.2016		17:16	01.01.2017		16:15
	abs.	%	%	abs.	%	%
Street gas stations	9,290	95.6	-0.4	9,255	95.6	-4.4
• Aral	2,215	22.8	-0.9	2,195	22.7	-4.5
• Shell	1,865	19.2	-1.3	1,840	19.0	-6.0
• Esso	1,000	10.3	-1.0	990	10.2	-1.5
• Jet	615	6.3	0.8	620	6.4	-2.2
• Orlen/Star	565	5.8	0.9	570	5.9	-4.8
• Westfalen	240	2.5	-2.1	235	2.4	-4.1
• Other street gas stations	2,790	28.7	0.5	2,805	29.0	-4.9
BAB-Gas station (motorway)	425	4.4	1.2	430	4.4	-3.5
Total	**9,715**	**100.0**	**-0.3**	**9,685**	**100.0**	**-4.4**

* 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**
	01.01.2016		17:16	01.01.2017		16:15
	abs.	%	%	abs.	%	%
North-West	1,435	15.4	-0.7	1,425	15.4	-4.7
North Rhine-Westphalia	2,070	22.3	-0.5	2,060	22.2	-4.5
Central	1,260	13.6	-0.4	1,255	13.6	-4.3
Baden-Wuerttemberg	1,255	13.5	-0.4	1,250	13.5	-4.4
Bavaria	1,665	17.9	-0.3	1,660	17.9	-4.3
North-East	705	7.6	0.0	705	7.6	-4.7
Thuringia/Saxony	665	7.2	0.0	665	7.2	-4.7
Berlin	235	2.5	2.1	240	2.6	-3.1
Total Germany	**9,290**	**100.0**	**-0.3**	**9,260**	**100.0**	**-4.4**
• West	7,685	82.7		7,650	82.6	
• East	1,605	17.3		1,610	17.4	

* 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

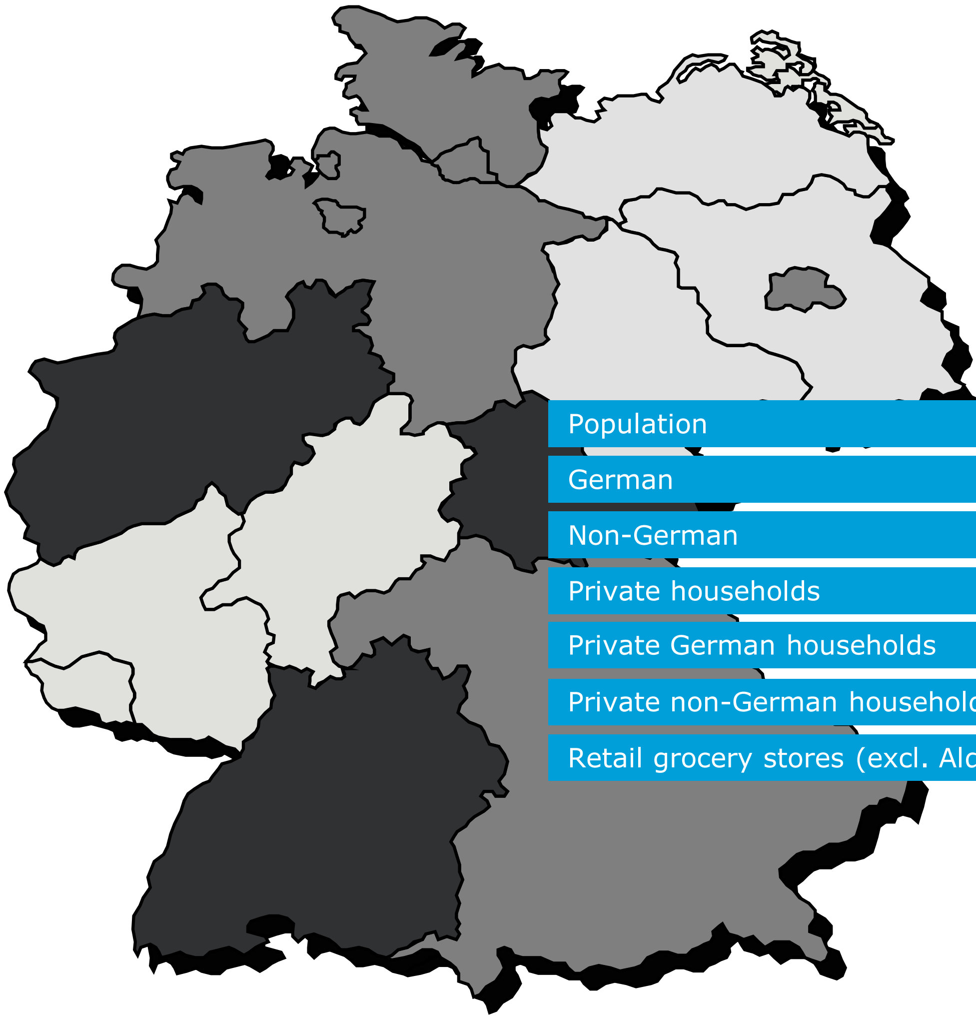
- North-West: Schleswig-Holstein, Hamburg, Lower Saxony, Bremen
- Central: Hesse, Rhineland-Palatinate, Saarland
- North-East: Mecklenburg-Western Pomerania, Brandenburg, Saxony-Anhalt

Products and services of IRI

InfoScan	
Classic retail grocery stores	Beverage Speciality Stores
· Stores up to 199 m²	C&C Outlets
· Hypermarkets 200—799 m²	Pet shops
· Hypermarkets	Do-it-yourself stores
· Discounters	Garden centers
· Brand-Name Discounters	Kiosks, Snack-Bars
· Classic Discounters (Aldi, Norma, Lidl)	Gas stations
Drugstores	
Chain Department stores	
Speciality perfumeries	

Markets	
Nonalcoholic beverages	Fragrance/Cosmetics
Beer	Bodycare
Spirits/Sparkling Wine/Wine	OTC
Hot beverages	Detergents, Cleansers and Cleaning Agents
Sweets/Confectionary/Long-Lasting Baked Goods	Petfood
Chilled Food	
Food	

Basic data – Germany



Population	82.6 M.
German	73.4 M.
Non-German	9.2 M.
Private households	40.22 M.
Private German households	36.52 M.
Private non-German households	3.7 M.
Retail grocery stores (excl. Aldi)	30,925

Population/Households: GfK-Prognosis 01.01.2017

Basic data – Germany

	Population			Area	Inhabitants
	in thousands	in million	percentage	in sq km	per sq km
North-West	13,244	13.2	16.1	64,570	205
North Rhine-Westphalia	17,866	17.9	21.8	34,113	524
Central	11,225	11.2	13.7	43,538	258
Baden-Wuerttemberg	10,880	10.9	13.2	35,751	304
Bavaria	12,844	12.8	15.6	70,550	182
North-East	6,343	6.3	7.7	73,320	87
Thuringia/Saxony	6,256	6.3	7.6	34,652	181
Berlin	3,520	3.5	4.3	892	3,948
Total Germany	**82,176**	**82.2**	**100.0**	**357,386**	**230**
• West	66,057	66.1	80.4	248,522	266
• East	16,118	16.1	19.6	108,863	148

- 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 2017

Basic data – Germany

	Number of stores		Sales in billion €		Population		Inhabitants per store	Stores per 1000 Inh.
	abs.	%	billion €	%	in thousands	%		
North-West	4,955	16.0	23.320	17.5	13,244	16.1	2,673	0.37
North Rhine-Westphalia	5,900	19.1	27.570	20.7	17,866	21.7	3,028	0.33
Central	4,335	14.0	18.120	13.6	11,225	13.7	2,589	0.39
Baden-Wuerttemberg	3,720	12.0	17.460	13.1	10,880	13.2	2,925	0.34
Bavaria	5,160	16.7	18.660	14.0	12,844	15.7	2,489	0.40
North-East	3,060	9.9	11.720	8.8	6,343	7.7	2,073	0.48
Thuringia/Saxony	2,945	9.6	10.920	8.2	6,256	7.6	2,124	0.47
Berlin	850	2.7	5.480	4.1	3,520	4.3	4,141	0.24
Total Germany	**30,925**	**100.0**	**133.250**	**100.0**	**82,176**	**100.0**	**2,657**	**0.38**
• West	24,070	77.8	105.130	78.9	66,057	80.4	2,744	0.36
• East	6,855	22.2	28.120	21.1	16,118	19.6	2,351	0.43

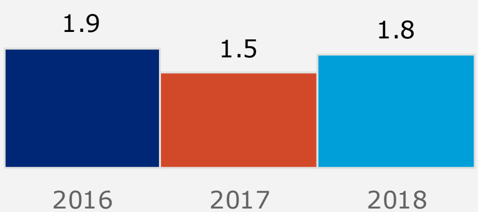
- North-West: Schleswig-Holstein, Hamburg, Lower Saxony, Bremen
- Central: Hesse, Rhineland-Palatinate, Saarland
- North-East: Mecklenburg-Western Pomerania, Brandenburg, Saxony-Anhalt

Source: Own calculation based on official statistics: Statistisches Bundesamt, Wiesbaden 2017

Economic key data – Germany

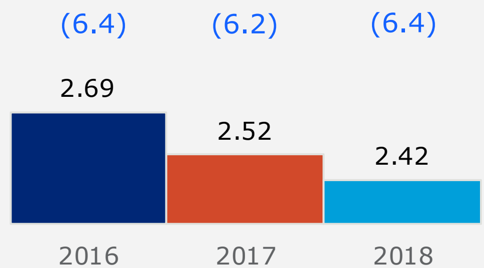
economic growth

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



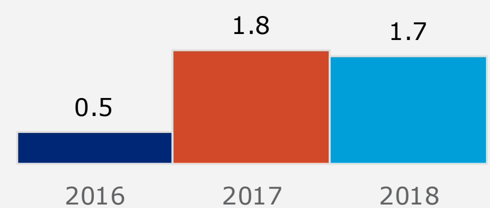
employment market

Unemployment in
million
(rate in %)*



price development

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

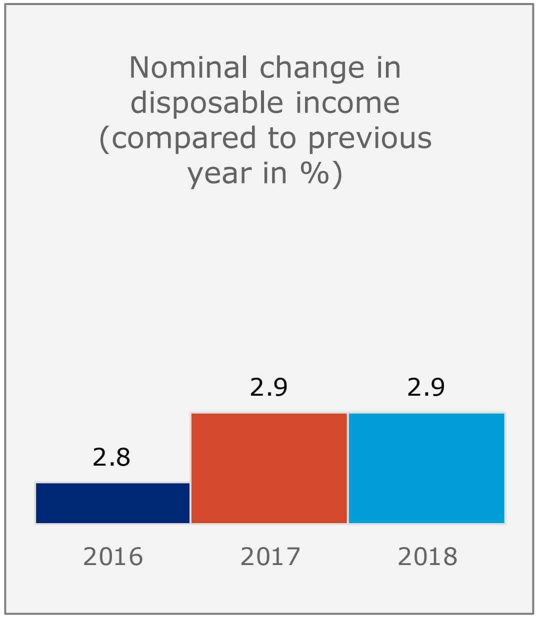


* Share of unemployed compared to domestic employable persons (residency concept)

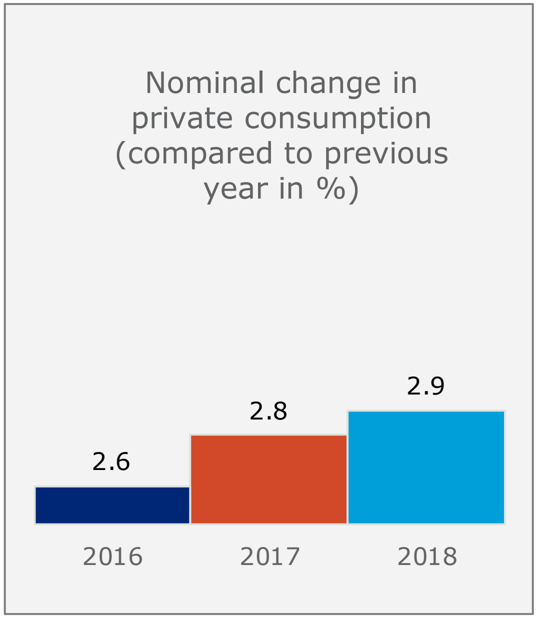
Source: Projektgruppe „Gemeinschaftsdiagnose" Joint Economic Forecast Spring Report 2017; (as of: 12.04.2017)

Economic key data – Germany

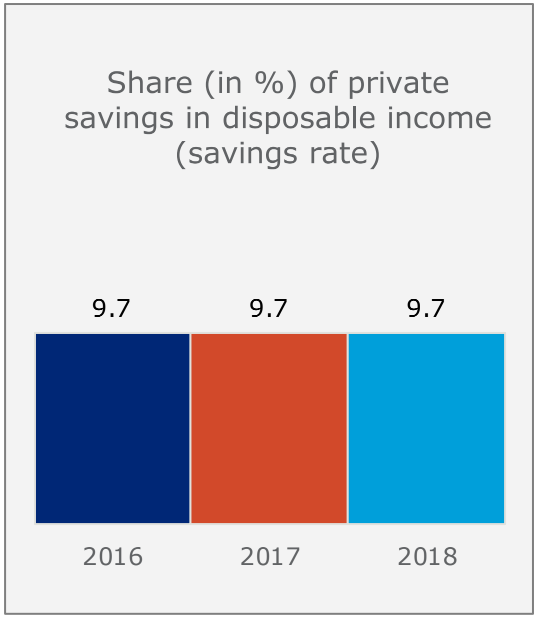
income



private consumption



private savings



Source: Projektgruppe „Gemeinschaftsdiagnose" Joint Economic Forecast Spring Report 2017; (as of: 12.04.2017)

Closing Contact / Information Slide

FOR MORE INFORMATION

Anja Liebkopf
Expert, Measurement Science
anja.liebkopf@IRIworldwide.com
+49 (0) 911 88182 255

Maksim Negorozhin
Experienced Specialist, Measurement Science
maksim.negorozhin@IRIworldwide.com
+49 (0) 911 88182 189

ABOUT IRI

IRI is a leader in delivering powerful market and shopper information, predictive analysis and the foresight that leads to action. We go beyond the data to ignite extraordinary growth for our clients in the CPG, retail and over-the-counter healthcare industries by pinpointing what matters and illuminating how it can impact their businesses across sales and marketing. Move your business forward at **www.IRIworldwide.de**

IRI Information Resources GmbH
Gladbecker Straße 1
40472 Düsseldorf