UNIVERSES 2018
GERMANY

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Growth delivered.

Contents

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IRi

Introduction

This Universes 2018 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 2017/2018 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

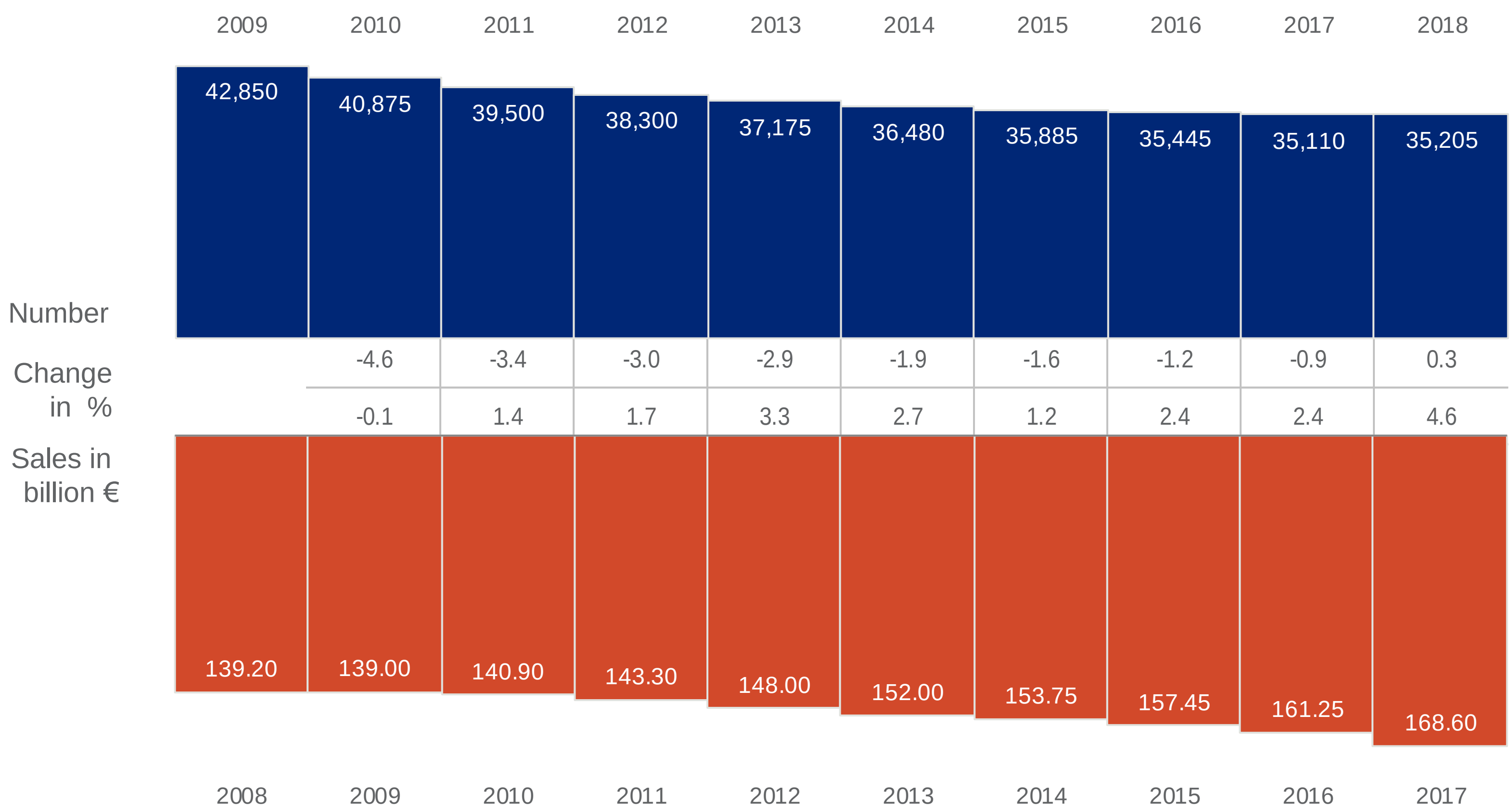
Continued consolidation

Value sales in the grocery class of trade (incl. Aldi) increased by 4.6% to €168.60bn in 2017.

The number of stores in Germany remains virtually unchanged. The continuing negative trend among smaller traditional grocery stores was compensated by the slight increase of the number of discounters and hypermarkets. In total the number of stores has increased by 0.3%. At the end of 2017, Germany had a total of 35,205 grocery stores with Aldi itself ending the year with a total of 4,155 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)

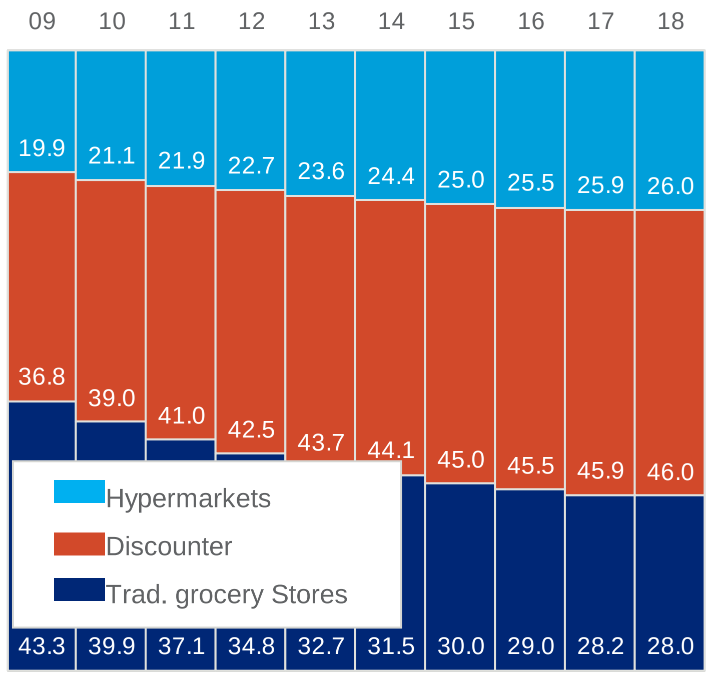
Discounters are self-service stores carrying mainly groceries in a limited range with emphasis on low prices. They have only basic furnishing and central check-outs. The most important representatives of this type of stores are Aldi, Lidl, Netto, Norma, Penny.

Traditional grocery stores

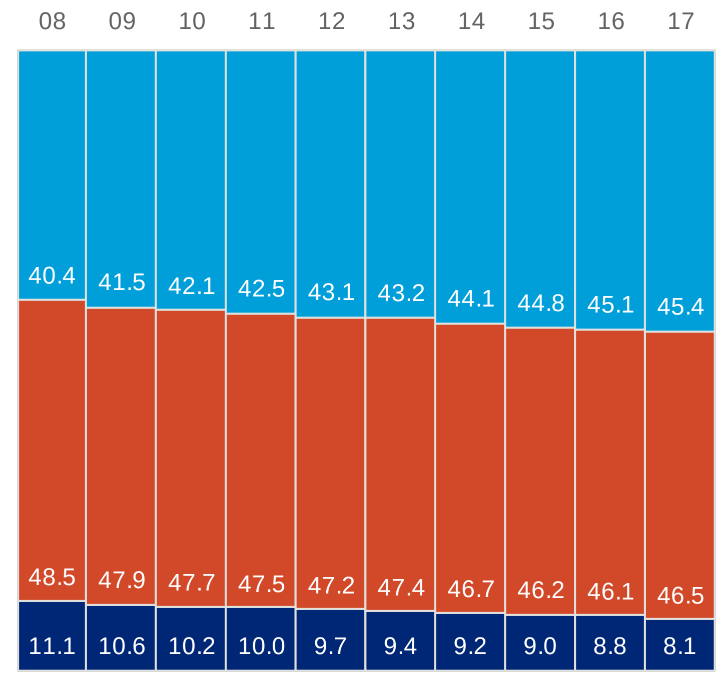
Outlets of the traditional retail food trade are stores with a range of goods consisting mainly of groceries. Stores of this type are neither hypermarkets nor discounters. Specialty shops offering groceries on the side are excluded (e.g. bakeries, confectioneries etc.).

Store types – incl. Aldi

Number of stores in %



Sales share in %



Ret. groc. trade No. / € in bn

	09	10	11	12	13	14	15	16	17	18
No.	42,850	40,875	39,500	38,300	37,170	36,480	35,885	35,445	35,110	35,205
Change in %		-4.6	-3.4	-3.0	-2.9	-1.9	-1.6	-1.2	-0.9	0.3

	08	09	10	11	12	13	14	15	16	17
€ in bn	139.20	139.00	140.90	143.30	148.00	152.00	153.75	157.45	161.25	168.60
Change in %		-0.1	1.4	1.7	3.3	2.7	1.2	2.4	2.4	4.6

Hypermarkets – Development

Hypermarkets were among the winners in Total Grocery in 2017 again.

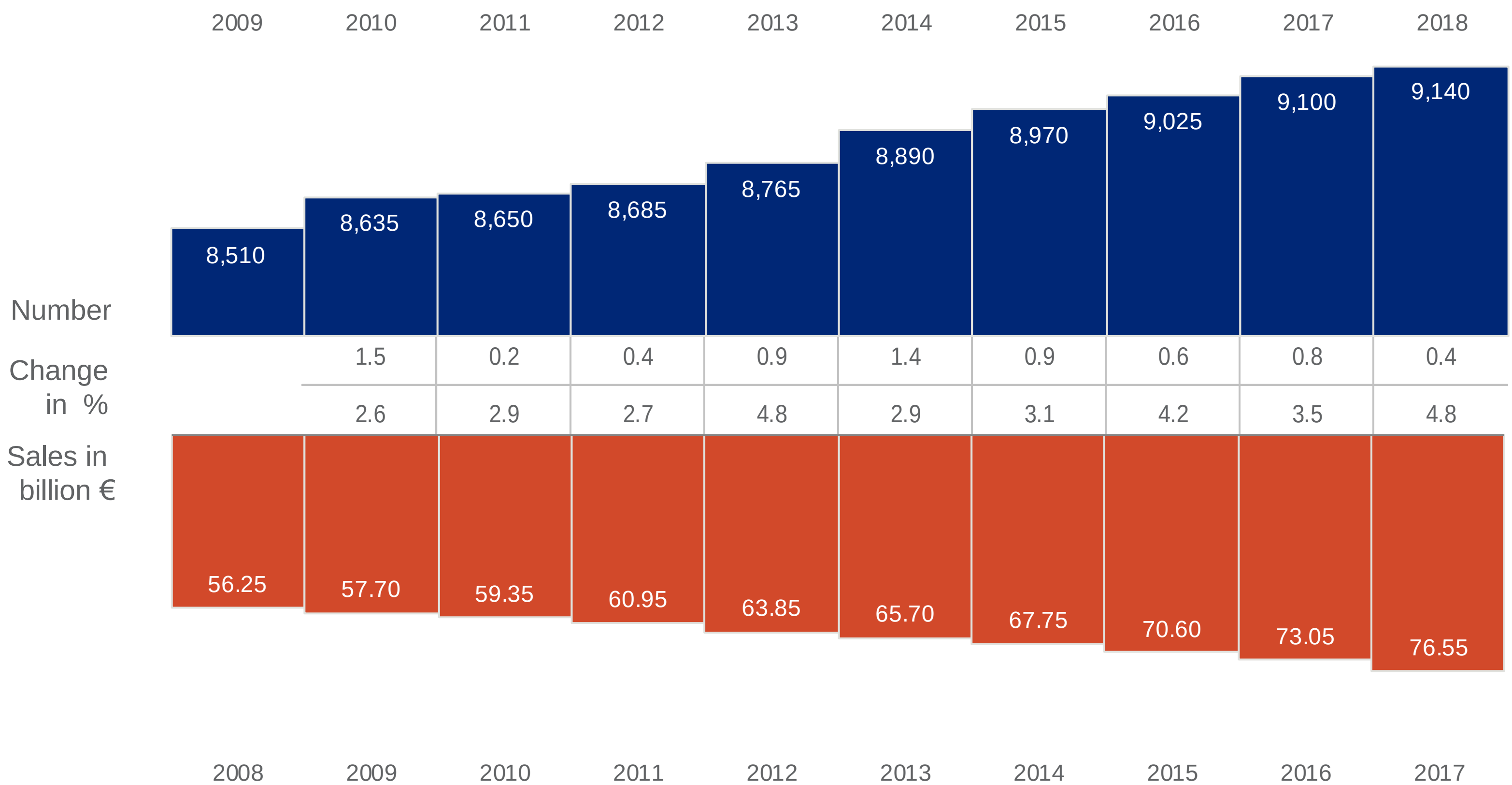
Due to the openings and selling space expansions the number of stores increased to 9,140. Nevertheless, it should be noted that 53.5% of the hypermarkets sales volume is generated by the smaller markets (selling spaces ranging from 800 to 1,499 sq m or from 1,500 to 2,499 sq m), which account for 77.7% of all hypermarkets.

Value sales increased to €76.55bn in 2017; hence the average turnover for hypermarkets slightly increased to €8m as well.

Regional distribution of hypermarkets at the end of 2017, by IRI regions:

• North-West	1,755	(+ 0.9%)
• North Rhine-Westphalia	1,820	(– 1.4%)
• Central	1,360	(+ 0.7%)
• South	2,625	(+ 1.2%)
• East	1,580	(+ 0.6%)
• Total:	9,140	(+ 0.4%)

Hypermarkets



Discounters – Development incl. Aldi

Discounters – positive performance in 2017

The increase of number of stores by 0.7% to 16,215 was accompanied by an increase in value sales by 5.4% to €78.42bn.

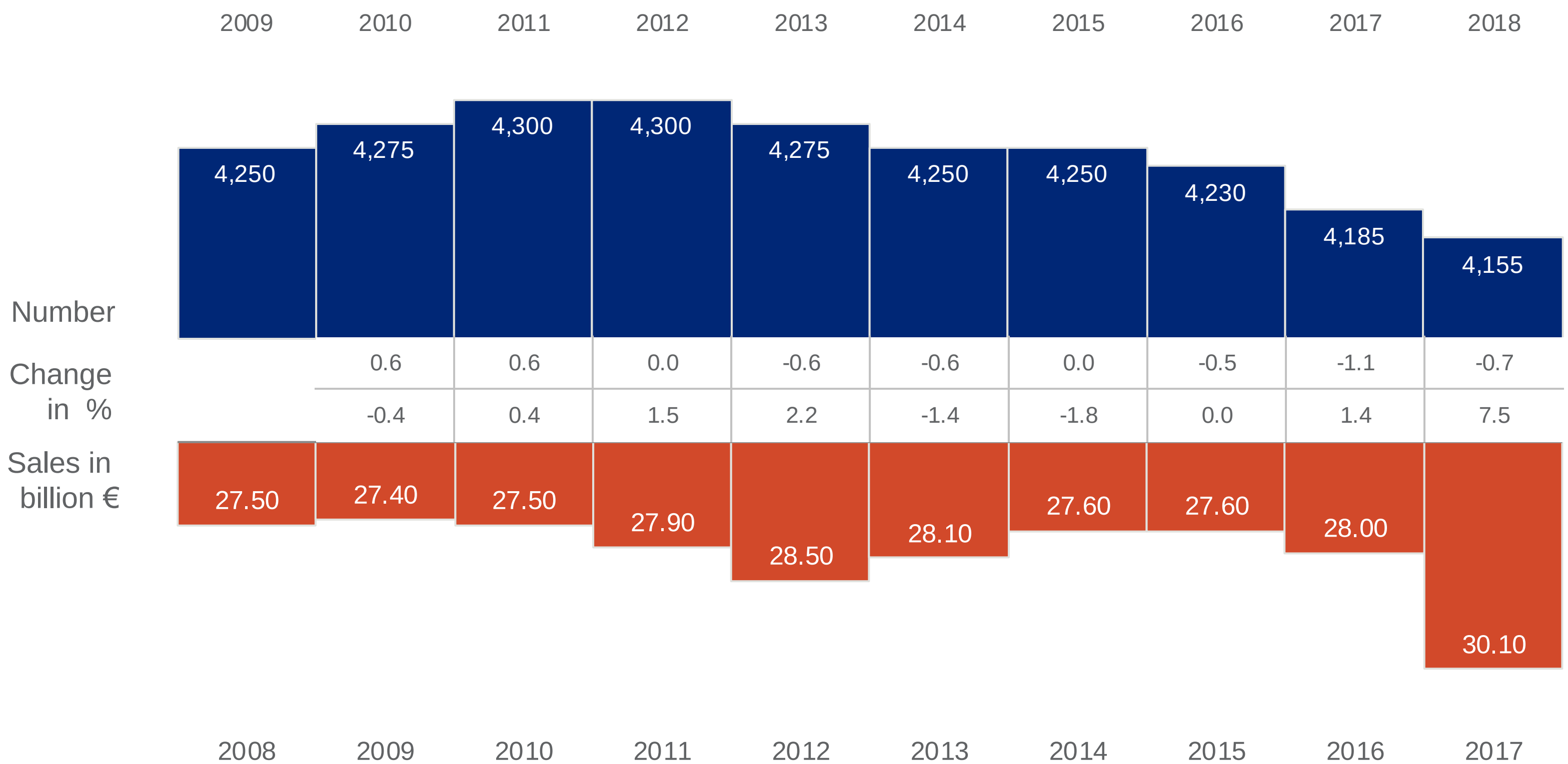
In 2017 this store type represents a value share of 46.5% of total grocery, which puts discounters even ahead of traditional grocery.

When Aldi is not included, discounters nowadays represent 28.7% of the total grocery value sales in Germany (€168.60bn).

Regional distribution of discounters (incl. Aldi) at the end of 2017, East vs West:

• West	12,085	(+ 0.8%)
• East	4,130	(+ 0.4%)
• Total	16,215	(+ 0.7%)

Aldi



* co-operation partner GfK: FOOD-Sales exclusively

Discounters – excl. Aldi

Discounters

Company	Name	Discounters incl. Aldi		Discounters excl. Aldi	
		Number 01.01.2018	Sales 2017	Number 01.01.2018	Sales 2017
		16,215	**78.42**	**12,060**	**48.32**
		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

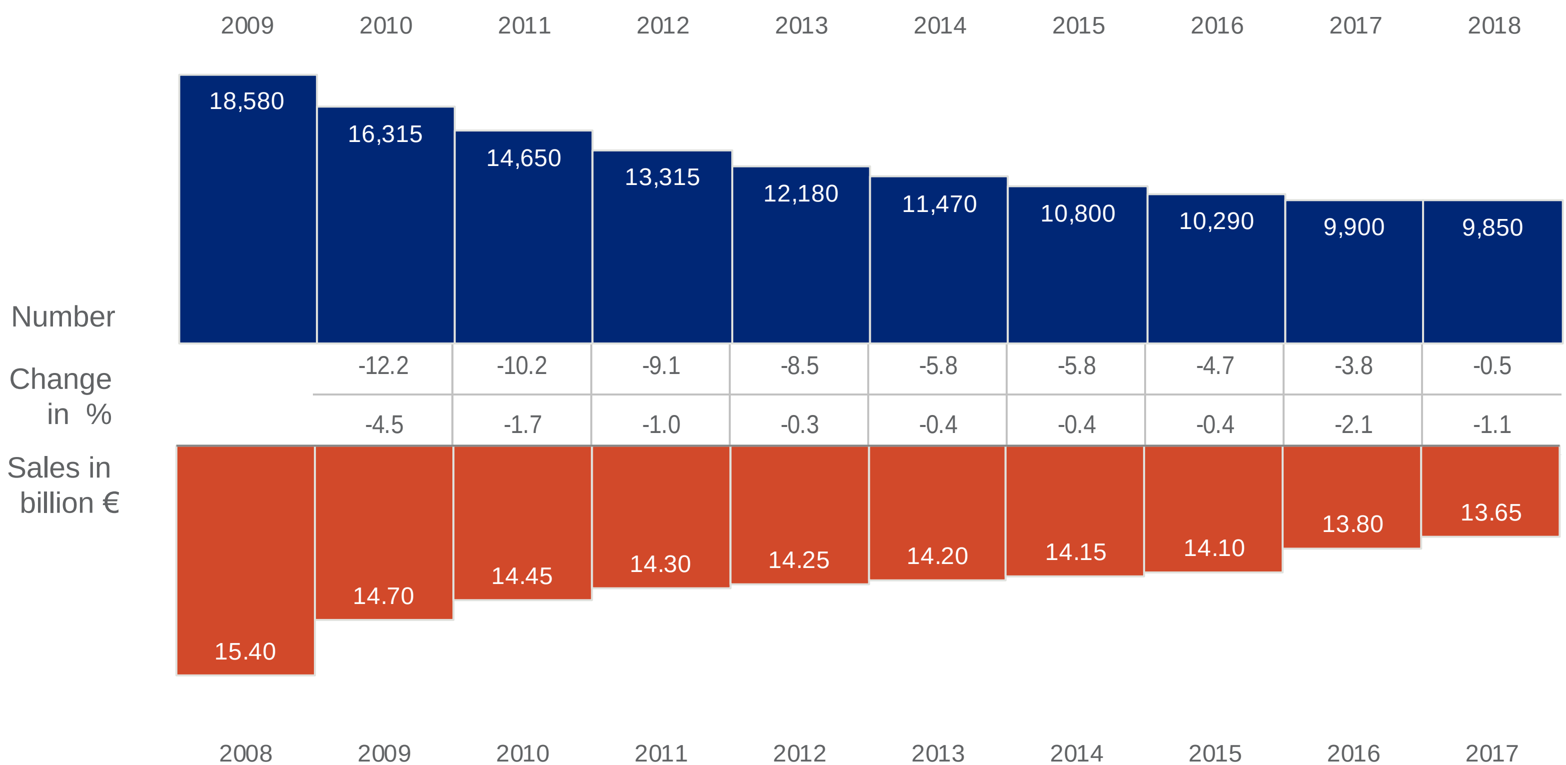
The total number of traditional grocery stores has declined. The number of stores in the largest category (3,860 stores up to 199 sq m) decreased by 4.3 %. In comparison to last year there is a significant decline due to the bigger classes of 200 to 399 sq m and 400 to 799 sq m increasing only with 3.9% and 0.6% respectively.

The entire traditional grocery store category again suffered losses in value sales in 2017. Sales fell by 1.1% to €13.65bn. Traditional grocery stores thus account for only 9.9% of total retail grocery sales (excl. Aldi).

Regional distribution of traditional grocery stores at the end of 2017, East vs West:

• West	12,085	(+ 0.8%)
• East	4,130	(+ 0.4%)
• Total	16,215	(+ 0.7%)

Traditional grocery stores



Store types – excl. Drugstores

	Number of stores					Sales in billion				
	01.01.2017		18:17	01.01.2018		2016		17:16	2017	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Hypermarkets	9,100	29.4	0.4	9,140	29.4	73.07	54.8	4.7	76.54	55.2
Discounters	11,925	38.6	1.1	12,060	38.9	46.41	34.8	4.1	48.32	34.9
Traditional grocery stores	9,900	32.0	-0.5	9,850	31.7	13.77	10.4	-0.8	13.65	9.9
Total	**30,925**	**100.0**	**0.4**	**31,050**	**100.0**	**133.25**	**100.0**	**3.9**	**138.50**	**100.0**
Aldi	4,185		-0.7	4,155		28.00		7.5	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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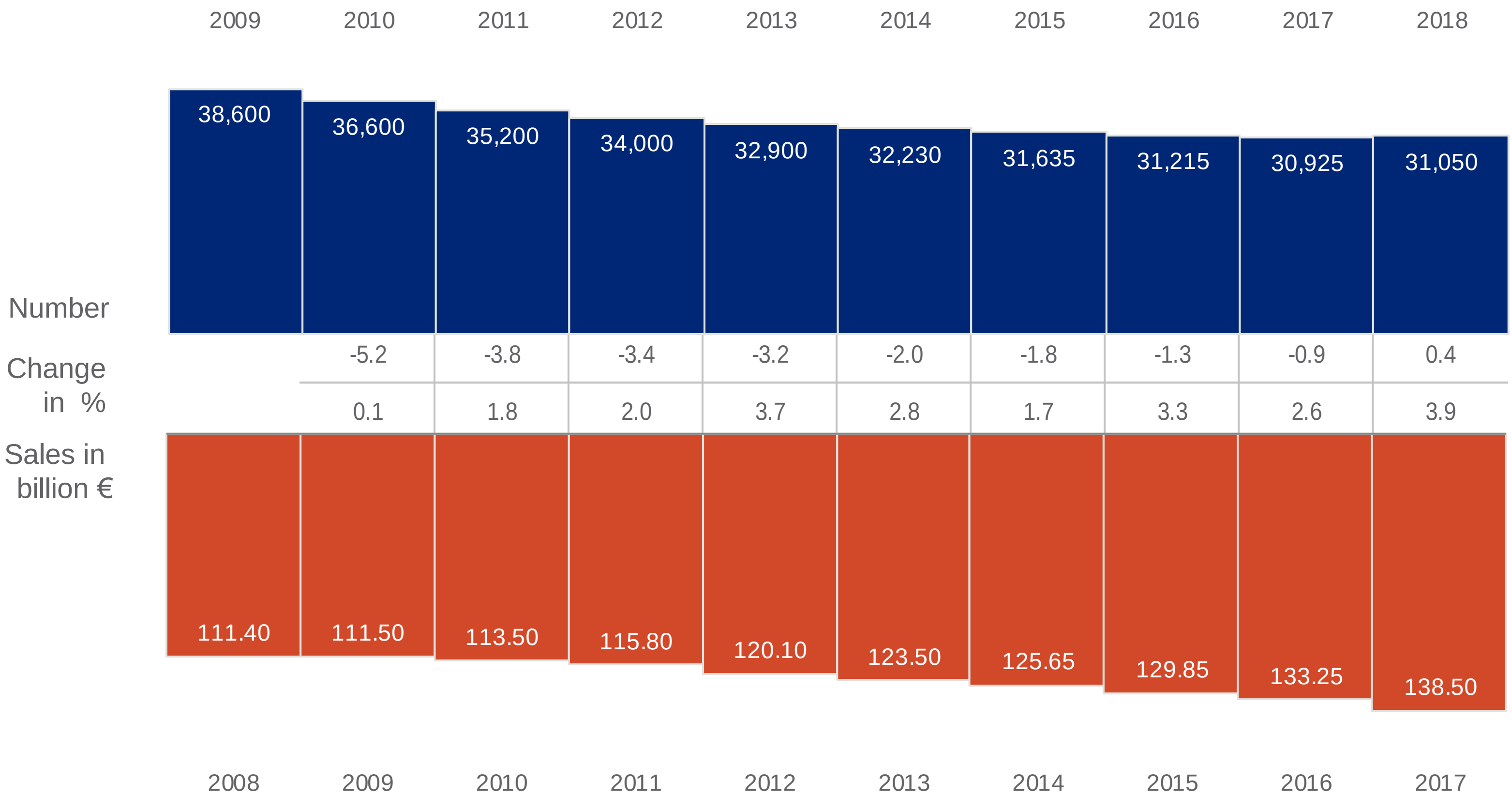
Selling space categories – incl. Aldi

	Number of stores					Sales in billion €				
	01.01.2017		18:17	01.01.2018		2016		17:16	2017	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
up to 199 sq m	4,035	11.5	-4.3	3,860	11.0	1.400	0.9	-2.9	1.350	0.8
200 to 399 sq m	2,675	7.6	3.9	2,780	7.9	2.740	1.7	-1.5	2.700	1.6
400 to 799 sq m	3,190	9.1	0.6	3,210	9.1	9.630	6.0	-0.3	9.600	5.7
800 to 1499 sq m	4,295	12.2	-0.6	4,270	12.1	20.760	12.9	4.0	21.600	12.8
1500 to 2499 sq m	2,775	7.9	2.0	2,830	8.0	18.220	11.2	6.2	19.350	11.5
2500 to 4999 sq m	1,360	3.9	0.7	1,370	3.9	16.190	10.0	5.5	17.085	10.1
5000 s qm or more	670	1.9	0.0	670	1.9	17.900	11.1	3.4	18.500	11.0
Discounters excl. Aldi	11,925	34.0	1.1	12,060	34.3	46.410	28.8	4.1	48.315	28.6
Aldi	4,185	11.9	-0.7	4,155	11.8	28.000	17.4	7.5	30.100	17.9
Total	**35,110**	**100.0**	**0.3**	**35,205**	**100.0**	**161.250**	**100.0**	**4.6**	**168.600**	**100.0**

Selling space categories – excl. Aldi

	Number of stores					Sales in billion €				
	01.01.2017		18:17	01.01.2018		2016		17:16	2017	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
up to 199 sq m	4,035	13.0	-4.3	3,860	12.4	1.400	1.1	-2.9	1.350	1.0
200 to 399 sq m	2,675	8.6	3.9	2,780	9.0	2.740	2.1	-1.5	2.700	1.9
400 to 799 sq m	3,190	10.3	0.6	3,210	10.3	9.630	7.1	-0.3	9.600	6.9
800 to 1499 sq m	4,295	13.9	-0.6	4,270	13.8	20.760	15.6	4.0	21.600	15.6
1500 to 2499 sq m	2,775	9.0	2.0	2,830	9.1	18.220	13.7	6.2	19.350	14.0
2500 to 4999 sq m	1,360	4.4	0.7	1,370	4.4	16.190	12.2	5.5	17.085	12.3
5000 s qm or more	670	2.2	0.0	670	2.2	17.900	13.4	3.4	18.500	13.4
Discounters excl. Aldi	11,925	38.6	1.1	12,060	38.8	46.410	34.8	4.1	48.315	34.9
Total	**30,925**	**100.0**	**0.4**	**31,050**	**100.0**	**133.250**	**100.0**	**3.9**	**138.500**	**100.0**

Total retail food trade – excl. Aldi



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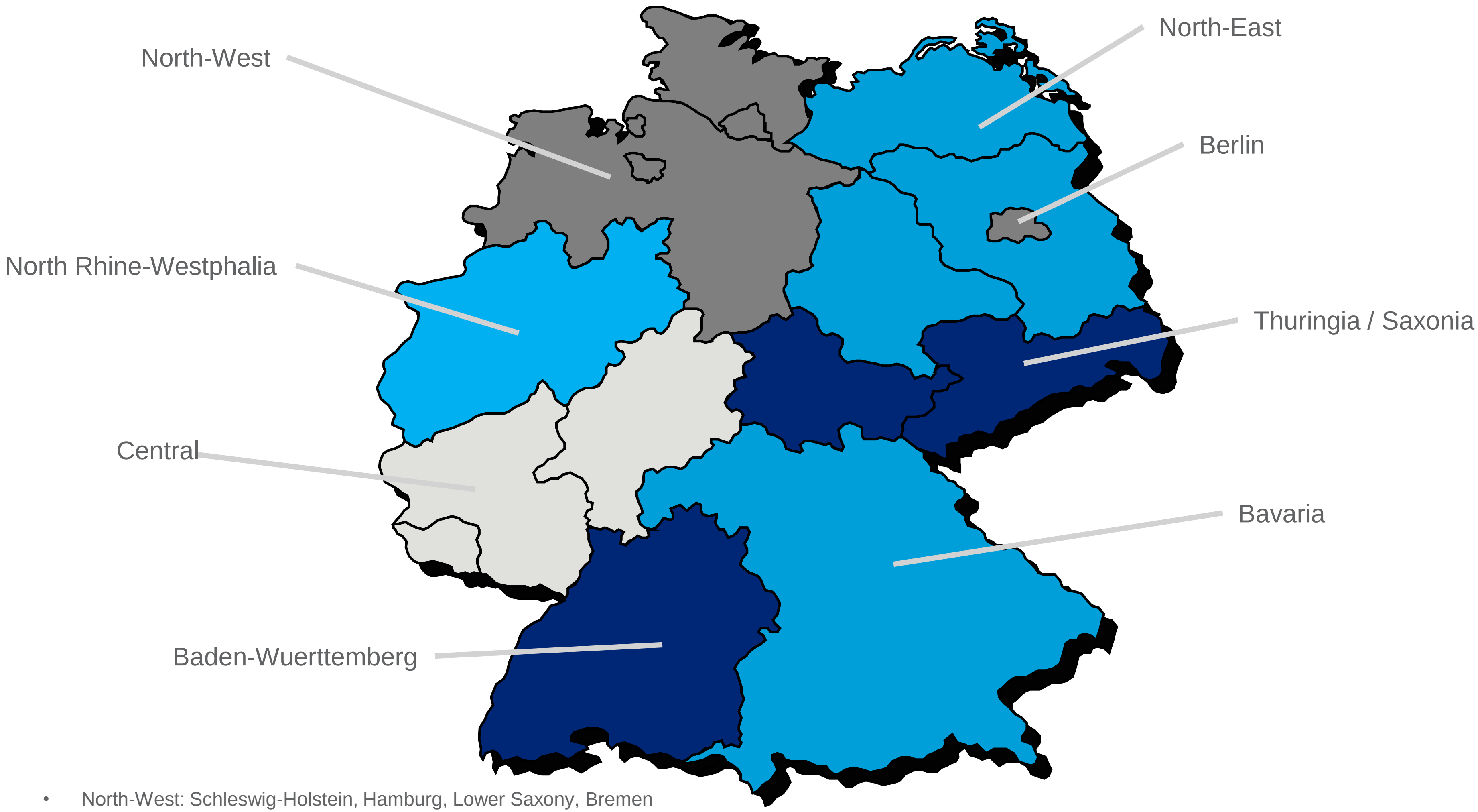
Regions – excl. Aldi

	Number of stores					Sales in billion €				
	01.01.2017		18:17	01.01.2018		2016		17:16	2017	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
North-West	4,955	16.0	0.2	4,965	16.0	23.320	17.5	3.9	24.240	17.5
North Rhine-Westphalia	5,900	19.1	-0.2	5,890	19.0	27.570	20.7	4.0	28.650	20.7
Central	4,335	14.0	1.0	4,380	14.1	18.120	13.6	3.9	18.830	13.6
Baden-Wuerttemberg	3,720	12.0	0.8	3,750	12.1	17.460	13.1	4.0	18.150	13.1
Bavaria	5,160	16.7	0.8	5,200	16.7	18.660	14.0	4.0	19.400	14.0
North-East	3,060	9.9	0.8	3,085	9.9	11.720	8.8	3.9	12.180	8.8
Thuringia/Saxony	2,945	9.6	0.3	2,955	9.5	10.920	8.2	3.9	11.350	8.2
Berlin	850	2.7	-2.9	825	2.7	5.480	4.1	4.0	5.700	4.1
Total Germany	**30,925**	**100.0**	**0.4**	**31,050**	**100.0**	**133.250**	**100.0**	**3.9**	**138.500**	**100.0**

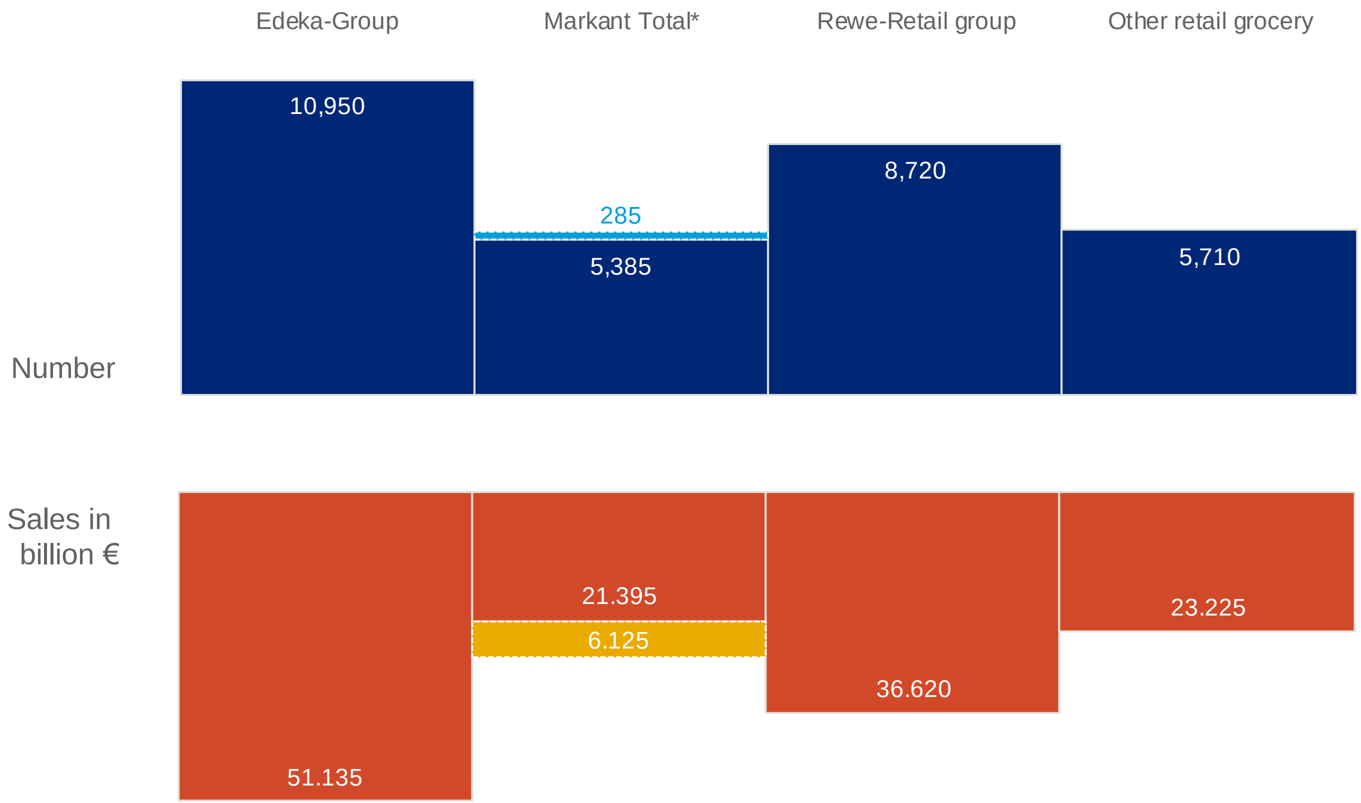
- North-West: Schleswig-Holstein, Hamburg, Lower Saxony, Bremen
- Central: Hesse, Rhineland-Palatinate, Saarland
- North-East: Mecklenburg-Western Pomerania, Brandenburg, Saxony-Anhalt

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 €6.125 bn.

Key-Accounts – excl. Aldi, drugstores

Average sales per store in million €	2017
Edeka-Group	4.67
• Retailers	5.71
• Edeka Discounters/Cooperations	3.36
Markant Total	4.85
• Markant ex. real,-	3.97
• real,- (formerly Metro Einzelhandel)	21.49
Rewe Retail Group	4.20
Other retail grocery	4.07
Total	**4.46**

Key-Accounts – excl. Aldi, drugstores

	Number of stores		Sales in billion €		Number of stores > 200 m²		Sales in billion €	
	01.01.2018		2017		01.01.2018		2017	
	abs.	%	billion €	%	abs.	%	billion €	%
Edeka-Group	10,950	35.3	51.135	36.9	9,350	34.4	50.465	36.8
• Retailers	6,105	19.7	34.870	25.2	4,505	16.6	34.200	24.9
• Affiliated companies/Coop.	4,845	15.6	16.265	11.7	4,845	17.8	16.265	11.9
Markant Total	5,670	18.2	27.520	19.8	4,245	15.6	27.050	19.8
• Markant ex. real,-	5,385	17.3	21.395	15.4	3,960	14.6	20.925	15.3
• real,- (formerly Metro Einzelhandel)	285	0.9	6.125	4.4	285	1.0	6.125	4.5
Rewe Retail Group	8,720	28.1	36.620	26.5	8,210	30.2	36.470	26.5
Other retail grocery	5,710	18.4	23.225	16.8	5,385	19.8	23.165	16.9
Total	**31,050**	**100.0**	**138.500**	**100.0**	**27,190**	**100.0**	**137.150**	**100.0**

Key-Accounts – excl. Aldi, incl. drugstores

	Number of stores		Sales in billion €		Number of stores > 200 m²		Sales in billion €	
	01.01.2018		2017		01.01.2018		2017	
	abs.	%	billion €	%	abs.	%	billion €	%
Edeka-Group	10,950	30.6	51.135	33.0	9,350	29.3	50.465	32.8
• Retailers	6,105	17.1	34.870	22.5	4,505	14.1	34.200	22.2
• Affiliated companies/Coop.	4,845	13.5	16.265	10.5	4,845	15.2	16.265	10.6
Markant Total	10,385	29.0	44.100	28.4	8,960	28.1	43.630	28.4
• Markant ex. real,-	10,100	28.2	37.975	24.5	8,675	27.2	37.505	24.4
• real,- (formerly Metro Einzelhandel)	285	0.8	6.125	3.9	285	0.9	6.125	4.0
Rewe Retail Group	8,720	24.4	36.620	23.6	8,210	25.7	36.470	23.7
Other retail grocery	5,710	16.0	23.225	15.0	5,385	16.9	23.165	15.1
Total	**35,765**	**100.0**	**155.080**	**100.0**	**31,905**	**100.0**	**153.730**	**100.0**
of which drugstores	4,715		16.580		4,715		16.580	

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 36.9%.

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 6,105 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 €34.870bn and shows a share of 25.2%.

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 4,845 stores representing value sales of €16.265bn.

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	Gaimersheim
		Feneberg	Kempten
		(ADEG)	
d) EHG Rhein-Ruhr			
Edeka Rhein-Ruhr	Moers		

Edeka Group – Sales channels

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

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

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 5,670 retail food stores, which attained sales of €27.520bn. 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 2017 charges Metro via Markant. This reorganization will be considered further.

With 285 sales outlets, former Metro Retailers account for sales of €6.125bn.

Markant – Organizational Classification

Company	Headquarters	Company	Headquarters
Bartels-Langness	Kiel	Klaas & Kock	Gronau
Budnikowsky	Hamburg	LHG Eibelstadt	Eibelstadt
Bünting	Leer	Lupus	Pforzheim
Cames	Neuss	Müller	Ulm
Citti	Kiel	Netto Supermarkt	Stavenhagen
dm Werner	Karlsruhe	Okle	Singen
Giehl	Nistertal	Real	Mönchengladbach
Globus	St. Wendel	Rossmann	Burgwedel
Jibi	Bielefeld	Tegut	Fulda
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	Budnikowsky		K+K Markt
	Famila		dm		Markant
	Globus		Kloppenburg		Tegut
	Handelshof		Müller		Um's Eck
	Jibi Markt		Rossman		
	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 8,720 outlet stores generated a sales volume of €36.620bn. This results in a share of 26.5% 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 increased slightly by 0.4%, whereas sales value increased by 4.0% 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 €23.225bn 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.

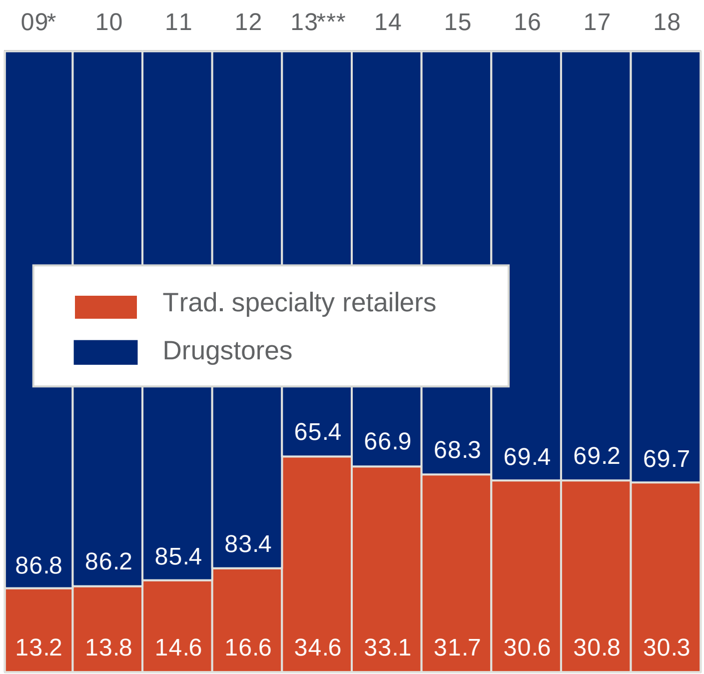
Specialty Perfumeries: Affiliated or non-affiliated stores with sales almost exclusively from the depot cosmetics area offering a marginal range of other products.

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.

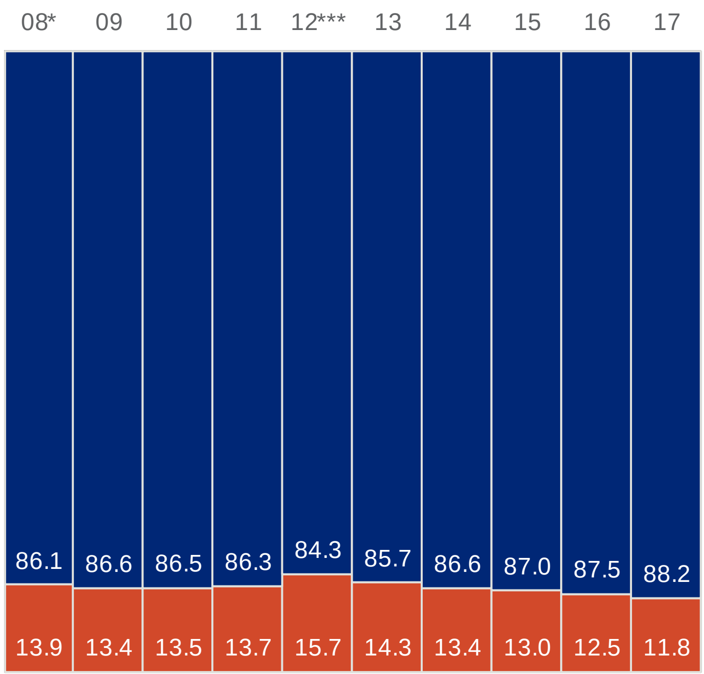
Drugstores/Perfumeries and specialized retailers* – excl. Chain Department Stores

Number of stores in %



Ret. groc. trade	09*	10	11	12	13***	14	15	16	17	18
No. / € in bn	15,890	15,015	14,045	12,290	5,890	6,005	6,245	6,450	6,700	6,760
Change in %		-5.5	-6.5	-12.5	-52.1	2.0	4.0	3.3	3.8	0.9

Sales share in % **



Ret. groc. trade	08*	09	10	11	12***	13	14	15	16	17
No. / € in bn	14.80	15.14	15.26	15.64	13.94	15.29	16.35	17.41	18.24	18.80
Change in %		2.3	0.8	2.5	-10.8	9.9	6.9	6.5	4.8	3.1

* 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 €19.39bn versus year ago.

The number of discount drugstores increased by 80 stores to a total of 4,715 stores.

The discount drugstores reduced their share of total drug and specialty perfumery (excl. department stores, since 01.01.2009 excl. specialty drugstores) to 69.7% (previous year: 69.2%), but increased their value share to 88.2% (previous year: 87.5%).

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

• North-West	1,240
• North Rhine-Westphalia	1,530
• Central	915
• Baden-Wuerttemberg	865
• Bavaria	1,095
• North-East	450
• Thuringia/Saxonia	400
• Berlin	265
• Total	6,760

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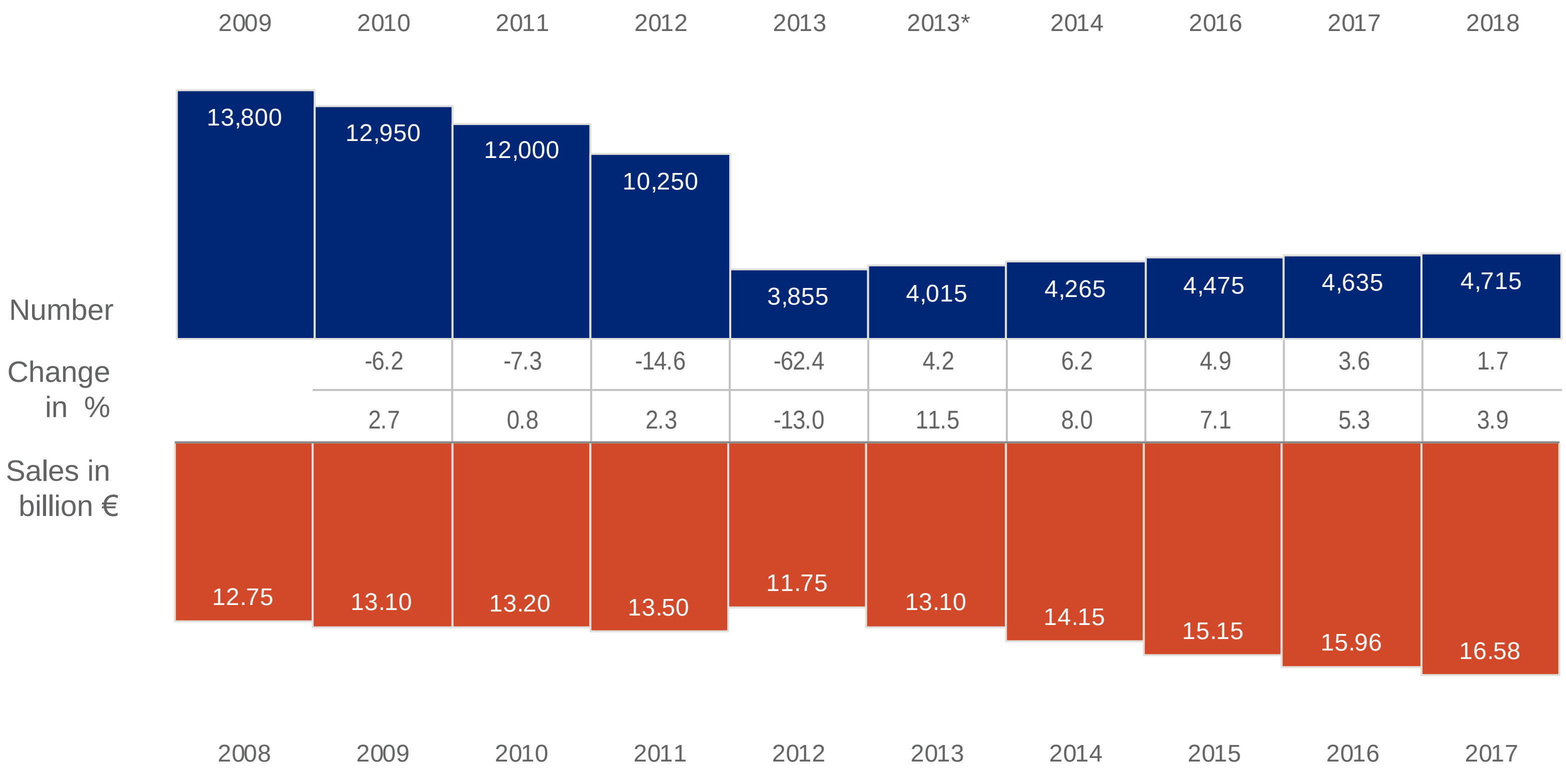
Drugstores/Perfumeries and specialized retailers

	Number of stores					Sales in billion €				
	01.01.2017		18:17	01.01.2018		2016		17:16	2017	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Spec. Perfumeries	2,065	30.0	-1.0	2,045	29.5	2.280	12.1	-2.6	2.220	11.5
Chain Department stores	180	2.6	-2.8	175	2.5	0.640	3.4	-7.8	0.590	3.0
Drugstores	4,635	67.4	1.7	4,715	68.0	15.960	84.5	3.9	16.580	85.5
Total	**6,880**	**100.0**	**0.8**	**6,935**	**100.0**	**18.880**	**100.0**	**2.7**	**19.390**	**100.0**

Drugstores

	Number 01.01.2018	Sales 2017
	4,715	€16.58bn
	Shares in %	
dm	41	47
Rossmann (incl. Kloppenburg)	44	38
Müller	11	12
Budnikowsky	4	3

Drugstores

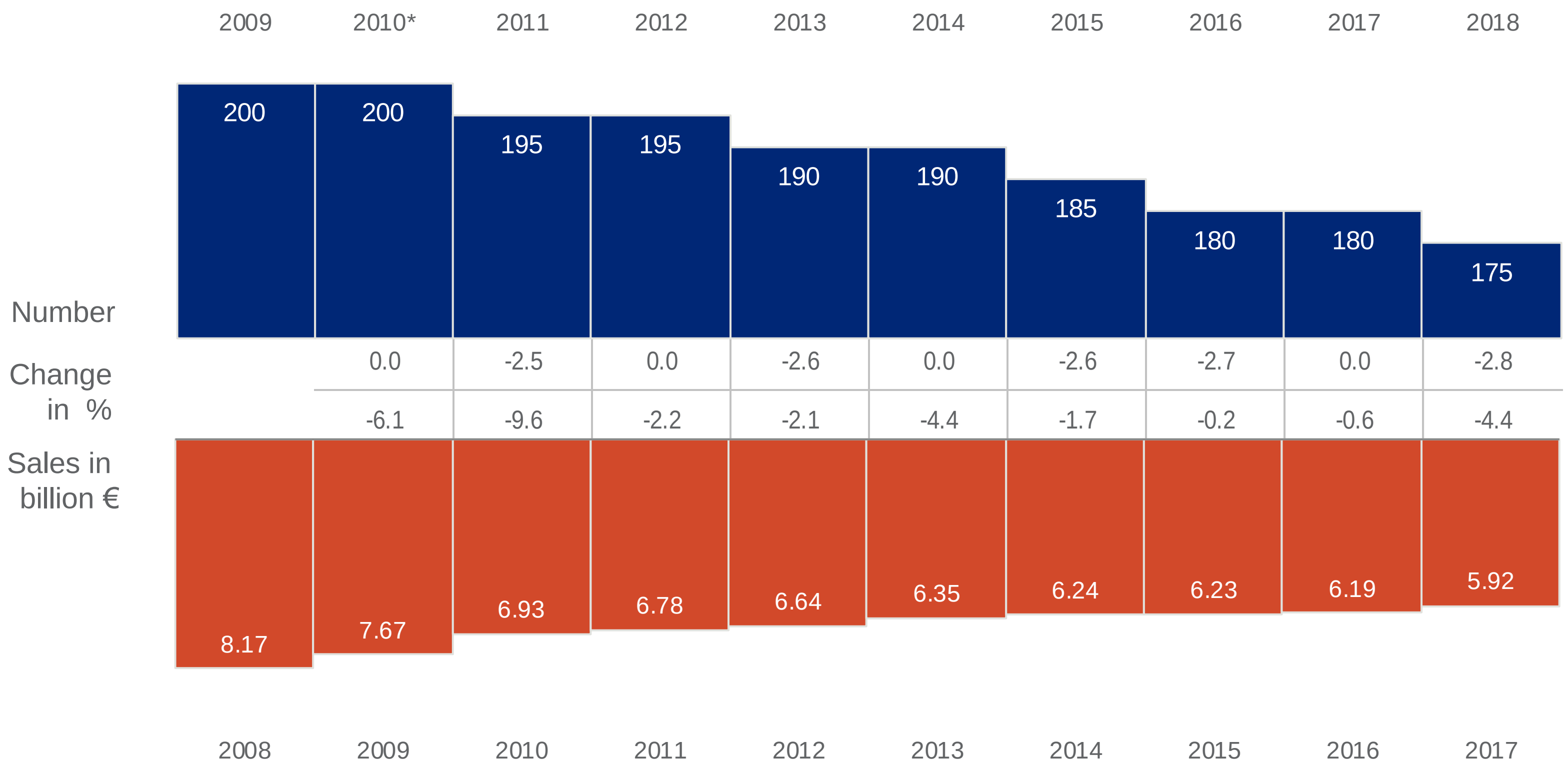


* Insolvency of Schlecker

Store types – Total retail food trade and drugstores

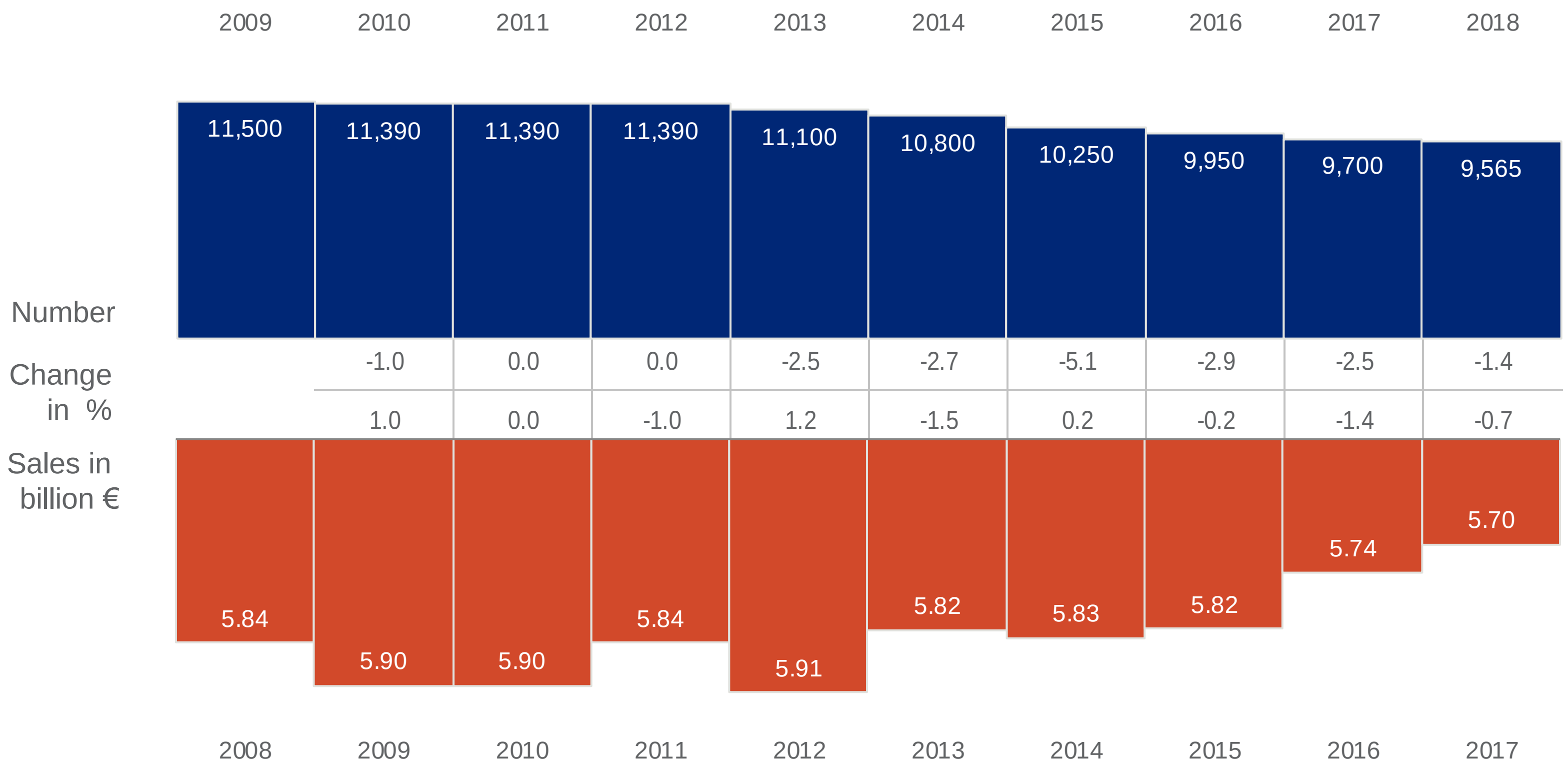
	Number of stores					Sales in billion				
	01.01.2017		18:17	01.01.2018		2016		17:16	2017	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Hypermarkets	9,100	22.9	0.4	9,140	22.9	73.07	41.2	4.7	76.54	41.3
Discounters	11,925	30.0	1.1	12,060	30.2	46.41	26.2	4.1	48.32	26.1
Trad. grocery stores	9,900	24.9	-0.5	9,850	24.7	13.77	7.8	-0.9	13.65	7.4
Aldi	4,185	10.5	-0.7	4,155	10.4	28.00	15.8	7.5	30.10	16.2
Drugstores	4,635	11.7	1.7	4,715	11.8	15.96	9.0	3.9	16.58	9.0
Total	**39,745**	**100.0**	**0.4**	**39,920**	**100.0**	**177.21**	**100.0**	**4.5**	**185.18**	**100.0**

Department stores



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

Beverage specialty stores*



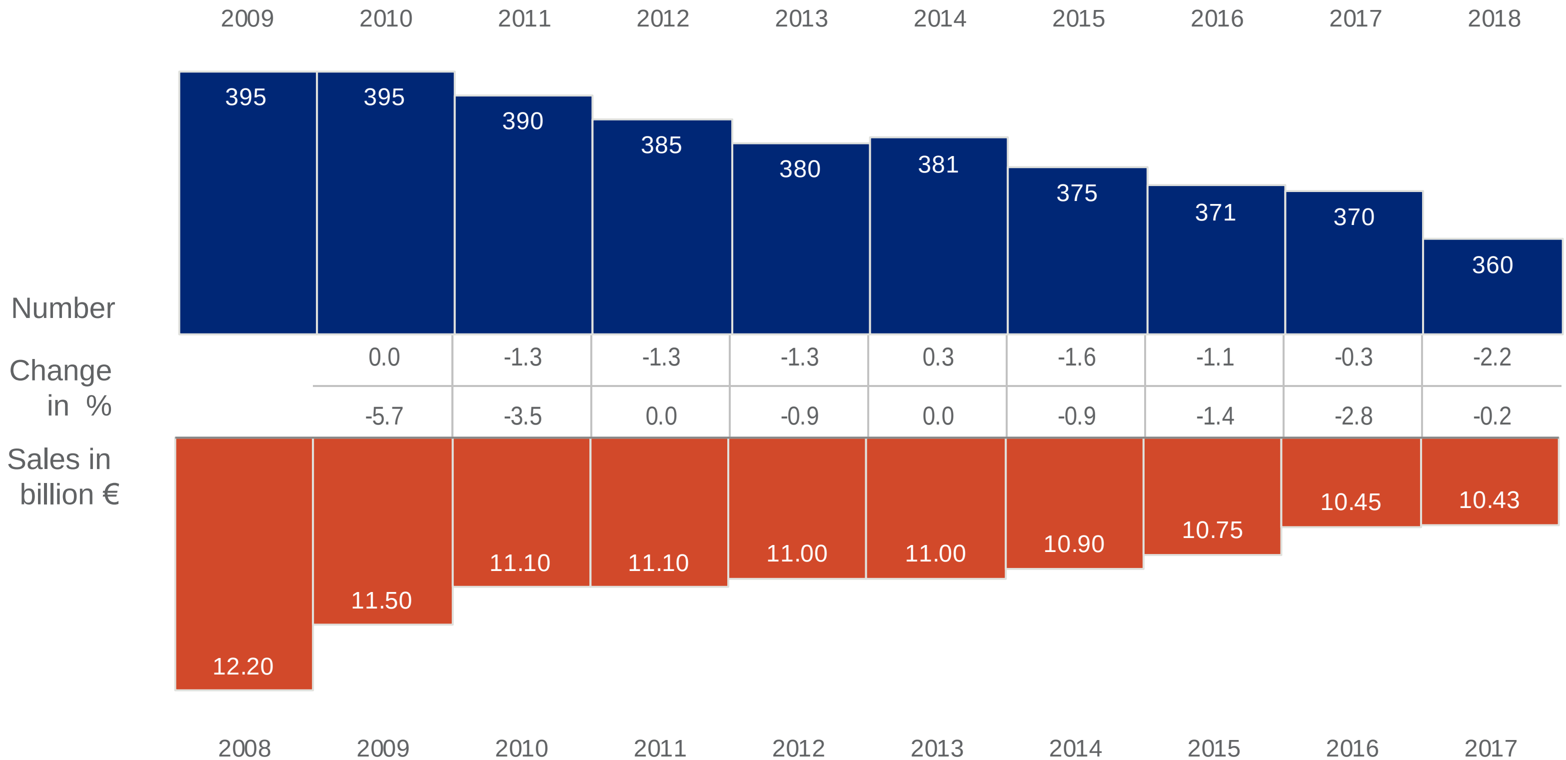
* Sales: Beer and Nonalcoholic beverages product categories

Beverage specialty stores – Regions

	Number of stores				
	01.01.2017		18:17	01.01.2018	
	abs.	%	%	abs.	%
North-West	935	9.6	-1.1	925	9.7
North Rhine-Westphalia	1,910	19.7	-1.6	1,880	19.7
Central	1,275	13.2	-1.6	1,255	13.1
Baden-Wuerttemberg	1,200	12.4	-1.7	1,180	12.3
Bavaria	2,090	21.5	-1.2	2,065	21.6
North-East	870	9.0	-1.7	855	8.9
Thuringia/Saxony	1,245	12.8	-1.2	1,230	12.9
Berlin	175	1.8	0.0	175	1.8
Total Germany	**9,700**	**100.0**	**-1.4**	**9,565**	**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



2009
2010
2011
2012
2013
2014
2015
2016
2017
2018
395
395
390
385
380
381
375
371
370
360
Number
Change
in %
0.0
-1.3
-1.3
-1.3
0.3
-1.6
-1.1
-0.3
-2.2
-5.7
-3.5
0.0
-0.9
0.0
-0.9
-1.4
-2.8
-0.2
Sales in
billion €
12.20
11.50
11.10
11.10
11.00
11.00
10.90
10.75
10.45
10.43
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017

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Total market

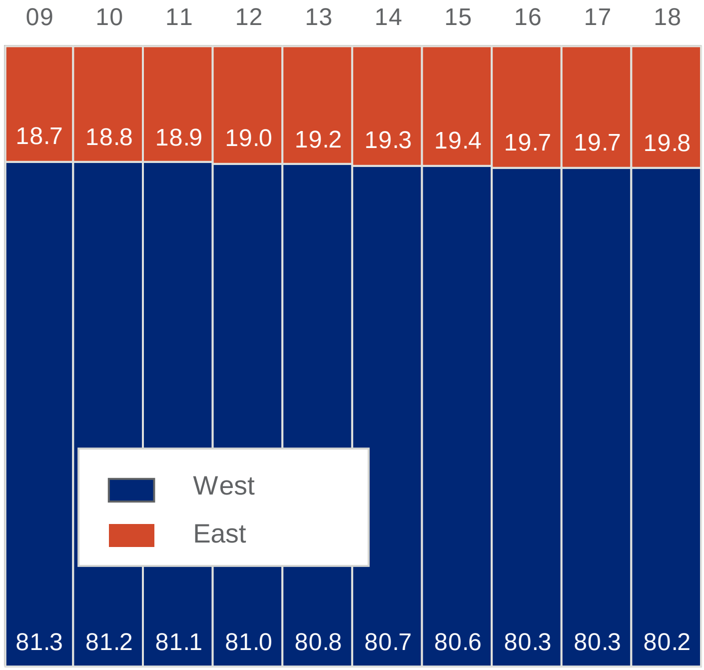
	Number of stores					Sales in billion €				
	01.01.2017		18:17	01.01.2018		2016		17:16	2017	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Hypermarkets	9,100	17.5	0.4	9,140	17.6	73.070	37.5	4.7	76.535	37.8
Discounters	11,925	22.9	1.1	12,060	23.2	46.410	23.8	4.1	48.315	23.8
Aldi	4,185	8.0	-0.7	4,155	8.0	28.000	14.3	7.5	30.100	14.8
Trad. grocery stores	9,900	19.0	-0.5	9,850	18.9	13.770	7.1	-0.9	13.650	6.7
Drugstores/Perfumeries*	6,700	12.9	0.9	6,760	13.0	18.240	9.4	3.1	18.800	9.3
Chain department stores**	180	0.3	-2.8	175	0.3	1.825	0.9	-0.8	1.810	0.9
Beverage speciality stores	9,700	18.7	-1.4	9,565	18.3	5.740	2.9	-0.7	5.700	2.8
C&C Outlets**	370	0.7	-2.7	360	0.7	8.070	4.1	-2.0	7.910	3.9
Total	**52,060**	**100.0**	**0.0**	**52,065**	**100.0**	**195.125**	**100.0**	**3.9**	**202.820**	**100.0**

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

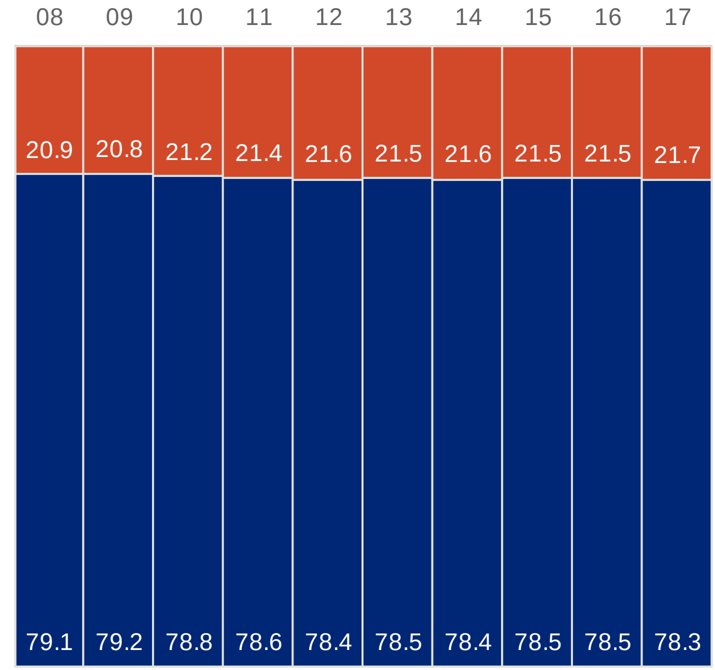
** Chain department stores and C&C Outlets **only grocery sales**

Pharmacies

Number of stores in %



Sales share in %



Ret. groc. trade

	09	10	11	12	13	14	15	16	17	18
No.	21,581	21,576	21,481	21,333	21,181	20,963	20,902	20,317	20,153	19,849
Change in %		0.0	-0.4	-0.7	-0.7	-1.0	-0.3	-2.8	-0.8	-1.5

	08	09	10	11	12	13	14	15	16	17
€ in bn	36.30	37.00	37.80	38.70	39.80	41.80	43.90	46.90	48.80	49.80
Change in %		1.9	2.2	2.4	2.8	5.0	5.0	6.8	4.1	2.0

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 4 branch stores and independent supply retailers with selling space of over 300 sq m.

	Number of stores					Sales in billion €				
	01.01.2017		18:17	01.01.2018		2016		17:16	2017	
	abs.	%	%	abs.	%	billion €	%	%	billion €	%
Freßnapf	880	57.9	0.6	885	57.7	1.184	65.8	5.6	1.250	66.0
Futterhaus	290	19.1	1.7	295	19.2	0.315	17.5	9.2	0.344	18.1
Petstores (excl. Freßnapf, Futterhaus)	350	23.0	1.4	355	23.1	0.301	16.7	0.0	0.301	15.9
Total	**1,520**	**100.0**	**1.0**	**1,535**	**100.0**	**1.800**	**100.0**	**5.3**	**1.895**	**100.0**

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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 01.01.2018:

• Do-it-yourself stores	2,145
• 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**
	01.01.2017		18:17	01.01.2018		17:16
	abs.	%	%	abs.	%	%
Street gas stations	9,255	95.6	0.3	9,285	95.6	-0.5
• Aral	2,195	22.7	0.0	2,195	22.6	-0.5
• Shell	1,840	19.0	-0.3	1,835	18.9	-1.5
• Esso	990	10.2	-2.0	970	10.0	-2.0
• Jet	620	6.4	4.8	650	6.7	2.0
• Orlen/Star	570	5.9	1.8	580	6.0	-2.0
• Westfalen	235	2.4	-2.1	230	2.3	-2.8
• Other street gas stations	2,805	29.0	0.7	2,825	29.1	1.1
BAB-Gas station (motorway)	430	4.4	0.0	430	4.4	2.0
Total	**9,685**	**100.0**	**0.3**	**9,715**	**100.0**	**-0.3**

* 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**
	01.01.2017		18:17	01.01.2018		17:16
	abs.	%	%	abs.	%	%
North-West	1,425	15.4	0.4	1,430	15.4	-1.1
North Rhine-Westphalia	2,055	22.2	0.5	2,065	22.3	-0.8
Central	1,255	13.6	0.0	1,255	13.5	-0.4
Baden-Wuerttemberg	1,250	13.5	0.4	1,255	13.5	0.1
Bavaria	1,660	17.9	0.3	1,665	17.9	-0.1
North-East	705	7.6	0.0	705	7.6	-0.6
Thuringia/Saxony	665	7.2	0.8	670	7.2	-0.1
Berlin	240	2.6	0.0	240	2.6	-0.9
Total Germany	**9,255**	**100.0**	**0.3**	**9,285**	**100.0**	**-0.5**
• West	7,645	82.6		7,670	82.6	
• East	1,610	17.4		1,615	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

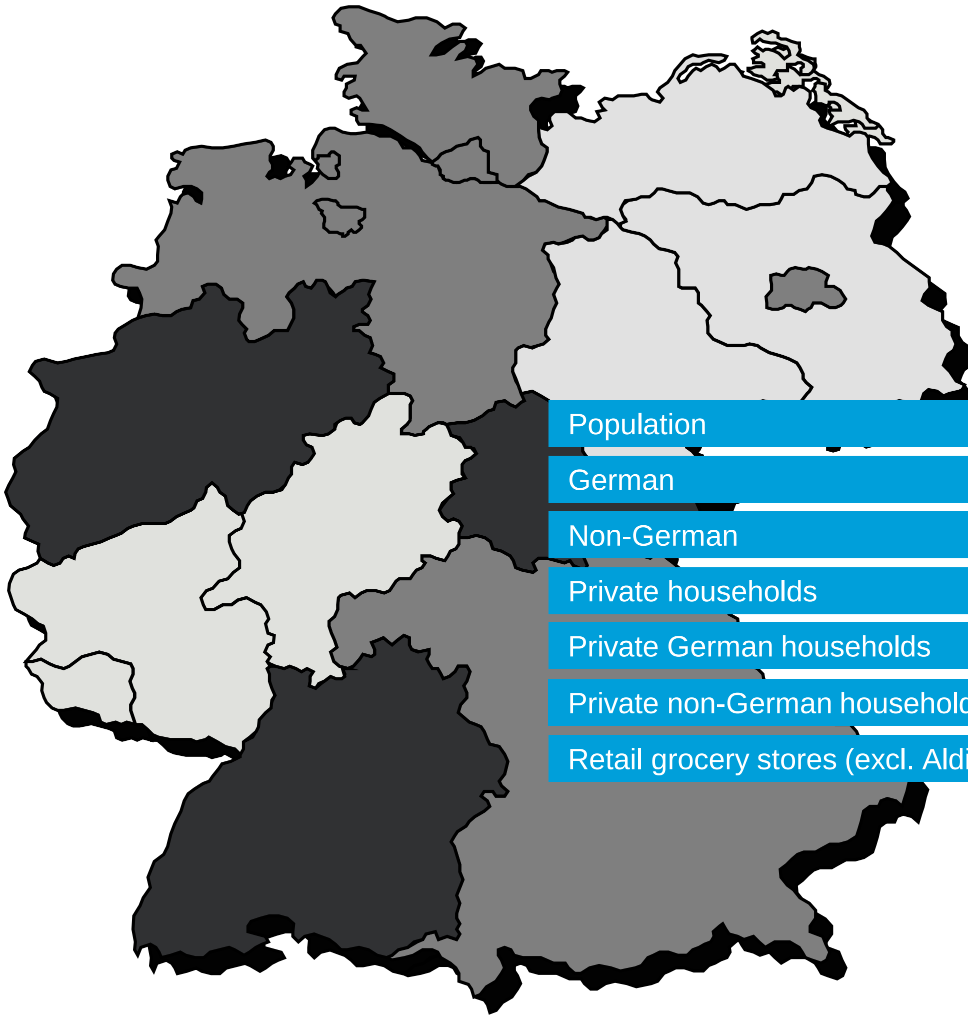
Products and services of IRI

Markets	InfoScan

• 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
	• 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
	• 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	82.8 M.
German	73.1 M.
Non-German	9.7 M.
Private households	40.35 M.
Private German households	36.15 M.
Private non-German households	4.2 M.
Retail grocery stores (excl. Aldi)	31,050

Population/Households: GfK-Prognosis 01.01.2018

Basic data – Germany

	Population			Area	Inhabitants
	in thousands	in million	percentage	in sq km	per sq km
North-West	13,342	13.3	16.1	64,570	207
North Rhine-Westphalia	17,894	17.9	21.7	34,113	525
Central	11,292	11.3	13.7	43,538	259
Baden-Wuerttemberg	10,984	11.0	13.3	35,751	307
Bavaria	12,970	13.0	15.7	70,550	184
North-East	6,336	6.3	7.7	73,320	86
Thuringia/Saxony	6,232	6.2	7.5	34,652	180
Berlin	3,590	3.6	4.3	892	4,026
Total Germany	**82,640**	**82.6**	**100.0**	**357,386**	**231**
• West	66,482	66.5	80.4	248,522	268
• East	16,158	16.1	19.6	108,864	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 2018

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Basic data – Germany

	Number of stores		Sales in billion €		Population		Inhabitants per store	Stores per 1000 Inh.
	abs.	%	billion €	%	in thousands	%		
North-West	4,965	16.0	24.240	17.5	13,342	16.1	2,687	0.37
North Rhine-Westphalia	5,890	19.0	28.660	20.7	17,894	21.7	3,038	0.33
Central	4,380	14.1	18.830	13.6	11,292	13.7	2,578	0.39
Baden-Wuerttemberg	3,750	12.1	18.150	13.1	10,984	13.3	2,929	0.34
Bavaria	5,200	16.7	19.400	14.0	12,970	15.7	2,494	0.40
North-East	3,085	9.9	12.180	8.8	6,336	7.7	2,054	0.49
Thuringia/Saxony	2,955	9.5	11.350	8.2	6,232	7.5	2,109	0.47
Berlin	825	2.7	5.700	4.1	3,590	4.3	4,352	0.23
Total Germany	**31,050**	**100.0**	**138.510**	**100.0**	**82,640**	**100.0**	**2,662**	**0.38**
• West	24,185	77.9	109.280	78.9	66,482	80.4	2,749	0.36
• East	6,865	22.1	29.230	21.1	16,158	19.6	2,354	0.42

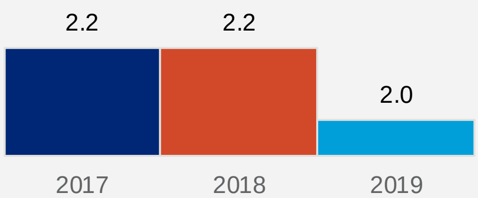
- North-West: Schleswig-Holstein, Hamburg, Lower Saxony, Bremen
- Central: Hesse, Rhineland-Palatinate, Saarland
- North-East: Mecklenburg-Western Pomerania, Brandenburg, Saxony-Anhalt

Source: Own calculation based on official statistics: Statistisches Bundesamt, Wiesbaden 2018

Economic key data – Germany

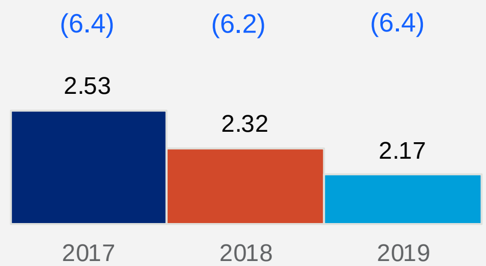
Economic growth

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



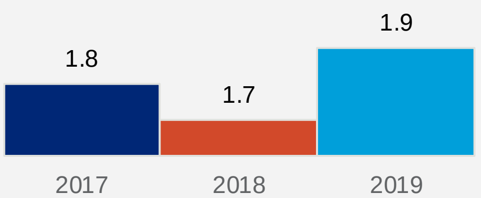
Employment market

Unemployment in million
(rate in %)*



Price development

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



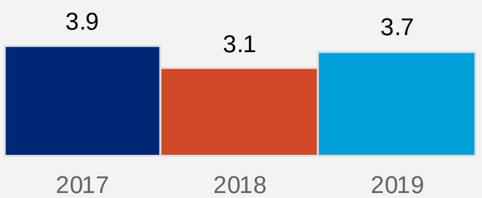
* Share of unemployed compared to domestic employable persons (residency concept)

Source: Projektgruppe „Gemeinschaftsdiagnose“ Joint Economic Forecast Spring Report 2018; (as of: 12.04.2018)

Economic key data – Germany

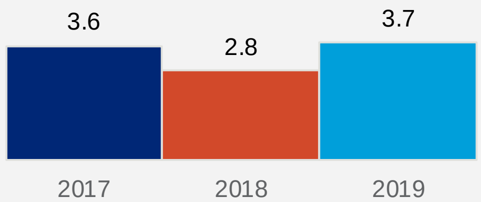
Income

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



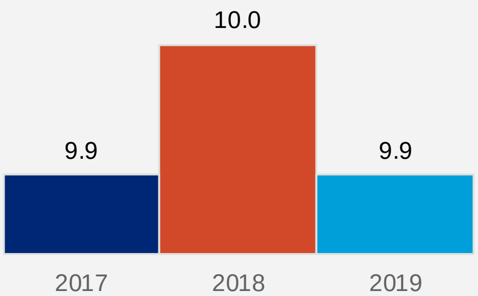
Private consumption

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



Private savings

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



Source: Projektgruppe „Gemeinschaftsdiagnose“ Joint Economic Forecast Spring Report 2018; (as of: 12.04.2018)

THANK YOU!

For More Information, Contact Us…

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