

Supermarkets - Germany - November 2015

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“The German grocery sector is characterised by the maturity of the discount sector compared to that of other European markets. Consumers are used to splitting their grocery shopping between the discounters and supermarkets in order to get the best value for money but this has led to an underdeveloped e-commerce sector that struggles to fit with this ‘little and often’ style of shopping.”
– Thomas Slide, Retail Analyst

This report looks at the following areas:

- Online retailing showing signs of development
- A mature market restricts store expansion

The German grocery market is characterised by the maturity of its discount sector compared to other European markets, which are seeing the discounters gain share as the economic climate remains difficult. The grocery shopping habits of German consumers reflects this dominance as they are much more likely to split their shopping into numerous shopping trips than elsewhere in Europe.

However, as the economy improves and unemployment falls, the growth of the discounters has come more into line with wider grocery sales. The discounters have found that to keep attracting new customers from the supermarkets they have to improve their service and product range. But by introducing more brands and services and experimenting with e-commerce they could risk undermining their low cost-base business model, which enables them to sell at such low prices, and consequently, their point of difference from the supermarkets.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Supermarkets - Germany - November 2015

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Europe – Overview

- What you need to know
- Areas covered in this report
- Technical notes
- Consumer spending
- Retail sales
- Financial definitions
- Currencies
- Abbreviations
- Sales tax rates
 - Figure 1: VAT rates, 2011-15

Germany – Overview

- What you need to know
- Areas covered in this report

Executive Summary

- The market
- Spending and inflation
 - Figure 2: Germany: Consumer spending on food and drink (including sales tax), 2011-15
- Channels of distribution
 - Figure 3: Germany: Estimated distribution of spending on food, beverages and tobacco, 2014
- Sector size and forecast
 - Figure 4: Germany: Retail sales at all food retailers, 2010-15
- Leading players
- Key metrics
- Market shares
 - Figure 5: Germany: Leading grocery retailers' estimated shares of all food retailers' sales, 2014
- Online
 - Figure 6: Germany: Percentage of all individuals who have bought online in the past 12 months, 2014
- The consumer
- Who shops for groceries
 - Figure 7: Germany: Who is responsible for grocery shopping, September 2015
- How they shop for groceries
 - Figure 8: Germany: How they shop for groceries, September 2015
 - Figure 9: Germany: How they shop for groceries, in-store versus online, September 2015
- Where they shop for groceries
 - Figure 10: Germany: Where they shop for groceries, September 2015
 - Figure 11: Germany: Where else they buy groceries from, September 2015

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
 EMAIL: reports@mintel.com

Supermarkets - Germany - November 2015

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

What we think

Issues and Insights

Online retailing showing signs of development

The facts

The implications

A mature market restricts store expansion

The facts

The implications

The Market – What You Need to Know

Spending down with inflation

The grocers grow their share of consumer spending

Food retailers' share of total spending stabilises

Spending and Inflation

Spending

Figure 12: Germany: Consumer spending (including sales tax), 2010-15

Inflation

Figure 13: Germany: Consumer prices: Annual % change, January 2014-September 2015

Figure 14: Germany: Consumer prices: Annual % change, 2010-14

Channels of Distribution

Grocers account for 76% of spending

Figure 15: Germany: Estimated distribution of spending on food, beverages and tobacco, 2014

Sector Size and Forecast

Food retailers' share of total spending stabilises

Figure 16: Germany: Retail sales (excluding sales tax), 2010-15

Figure 17: Germany: Retail sales forecasts (excluding sales tax), 2015-20

Leading Retailers – What You Need to Know

Supermarkets stabilise their market share

Aldi sales fall in 2014

Kaiser's Tengelmann takeover blocked

Leading Retailers

Supermarkets stabilise their market share

Figure 18: Germany: Share of leading retailers sales by operation type, 2012-14

Aldi sales fall in 2014

Discounter's softening their offer

Kaiser's Tengelmann takeover blocked

Figure 19: Germany: Leading grocery retailers: Net revenues, 2012-14

Store numbers

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Germany - November 2015

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 20: Germany: Leading grocers: Store numbers, 2012-14

Sales per outlet

Figure 21: Germany: Leading grocers: Annual sales per outlet, 2012-14

Market Share

Figure 22: Germany: Leading grocery retailers' estimated shares of all food retailers' sales, 2012-14

Online

Online food retailing remains underdeveloped

Online activity

Figure 23: Germany: Percentage of all individuals who have bought online in the past 12 months, 2014

Figure 24: Germany: Percentage of all individuals purchasing online in the past 12 months, 2010-14

Online sales

Leading online players

Figure 25: Germany: Leading grocers' online offers, October 2015

The Consumer – What You Need to Know

High levels of sole/main shopping responsibility

German consumers prefer multiple shopping trips

Financial health dictates shopping behaviour

Single person households prefer small, regular shopping trips

Online remains very underused

Lidl and Rewe most popular for main shop

Discounters more dominant for secondary shopping

The Consumer – Who Shops for Groceries

High levels of grocery shopping responsibility

Figure 26: Germany: Who is responsible for grocery shopping, September 2015

Power of one

Figure 27: Germany: Distribution of household type, 2005-14

The Consumer – How They Shop for Groceries

Top-up shopping dominates

Figure 28: Germany: How they shop for groceries, September 2015

Financial health dictates shopping behaviour

Figure 29: Germany: Where they buy groceries from, by average income. September 2015

Figure 30: Germany: How they shop for groceries, by financial health, September 2015

Single person households prefer top-up shopping

Figure 31: Germany: How they shop for groceries, by household size, September 2015

Where they do regular main and top-up grocery shopping

Figure 32: Germany: How they shop for groceries, in-store versus online, September 2015

The Consumer – Where They Shop for Groceries

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Germany - November 2015

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Lidl and Rewe most popular for main shop

Figure 33: Germany: Where they spend the most on groceries, September 2015

Figure 34: Germany: Where they spend most in a typical month for groceries, by age and affluence, September 2015

Rewe is the favourite of top-up only shoppers

Figure 35: Germany: With which grocery retailer they spend the most money, selected retailers by type of shopping behaviour, September 2015

Aldi the overall favourite for top-up shopping

Figure 36: Germany: Where else they buy groceries from. September 2015

Figure 37: Germany: Where else they buy groceries from. September 2015

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Data sources

Aldi

What we think

Aldi Sud still the innovator

The UK

Costs

Online

Everywhere else

Company background

Company performance

Figure 38: Aldi: Group financial performance, 2010-14

Figure 39: Aldi: Outlet data, 2010-14

Retail offering

Edeka Group

What we think

Gastronomy attractions to inspire and attract customers

Tapping into growth markets

Upgrading the discount in-store experience

The first German discount supermarket to join a loyalty scheme

Innovative time-saving click and collect proposition

Expanded online offering

Company background

Company performance

Figure 40: Edeka Group: Core food retailing financial performance, 2010-14

Figure 41: Edeka Group: Outlet data, 2010-14

Retail offering

Real (Metro Group)

What we think

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Supermarkets - Germany - November 2015

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

New buying deal should bolster Real's competitive position
 Store revamp programme yielding positive results
 A new and more efficient logistical infrastructure to come on-stream in early 2017
 A new convenient food venture
 Company background
 Company performance
 Figure 42: Real: Group financial performance, 2010/11-2014/15
 Figure 43: Real: Outlet data, 2010/11-2014/15

Retail offering

Rewe

What we think
 Penny
 Online
 Where next
 Company background
 Company performance
 Figure 44: Rewe: Group financial performance, 2010-14
 Figure 45: Rewe: Outlet data, 2010-14

Retail offering

Rewe
 Penny
 Penny

Schwarz Group (Lidl, Kaufland)

What we think
 Cost
 Kaufland
 Expansion
 Where next
 Company background
 Company performance
 Figure 46: Schwarz Group: Group financial performance, 2010/11-2014/15
 Figure 47: Schwarz Group: Outlet data, 2010/11-2014/15

Retail offering

Spar International

What we think
 Transit locations
 Pushing its health and wellness credentials
 Leading the contactless payment revolution

BUY THIS
 REPORT NOW

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
 EMAIL: reports@mintel.com

Supermarkets - Germany - November 2015

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Strengthening local ties

New digital strategy to connect with Millennials

An award winning brand

Building on its foodservice offering

Company background

Company performance

Figure 48: Spar International: Retail sales, by country, 2010-14

Figure 49: Spar International: Outlets, 2010-14

Figure 50: Spar International: Retail sales area, 2010-14

Figure 51: Spar International: Sales per sq m, by country, 2010-14

Retail offering

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com