

Retail in Germany

May 2025

Table of Contents

Retail in Germany

EXECUTIVE SUMMARY

Retail in 2024: The big picture Similar growth rates for discounters and supermarkets, while interest in organic food and drinks continues to rise

Enhancing retail success through omnichannel integration What next for retail?

OPERATING ENVIRONMENT

Informal retail Opening hours for physical retail Summary 1 - Standard Opening Hours by Channel Type 2024 Seasonality Christmas Summer Sales

MARKET DATA

Table 1 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2019-2024 Table 2 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2019-2024 Table 3 - Sales in Retail Offline by Channel: Value 2019-2024 Table 4 - Sales in Retail Offline by Channel: % Value Growth 2019-2024 Table 5 - Retail Offline Outlets by Channel: Units 2019-2024 Table 6 - Retail Offline Outlets by Channel: % Unit Growth 2019-2024 Table 7 - Sales in Retail E-Commerce by Product: Value 2019-2024 Table 8 - Sales in Retail E-Commerce by Product: % Value Growth 2019-2024 Table 9 - Grocery Retailers: Value Sales, Outlets and Selling Space 2019-2024 Table 10 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2019-2024 Table 11 - Sales in Grocery Retailers by Channel: Value 2019-2024 Table 12 - Sales in Grocery Retailers by Channel: % Value Growth 2019-2024 Table 13 - Grocery Retailers Outlets by Channel: Units 2019-2024 Table 14 - Grocery Retailers Outlets by Channel: % Unit Growth 2019-2024 Table 15 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2019-2024 Table 16 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2019-2024 Table 17 - Sales in Non-Grocery Retailers by Channel: Value 2019-2024 Table 18 - Sales in Non-Grocery Retailers by Channel: % Value Growth 2019-2024 Table 19 - Non-Grocery Retailers Outlets by Channel: Units 2019-2024 Table 20 - Non-Grocery Retailers Outlets by Channel: % Unit Growth 2019-2024 Table 21 - Retail GBO Company Shares: % Value 2020-2024 Table 22 - Retail GBN Brand Shares: % Value 2021-2024 Table 23 - Retail Offline GBO Company Shares: % Value 2020-2024 Table 24 - Retail Offline GBN Brand Shares: % Value 2021-2024 Table 25 - Retail Offline LBN Brand Shares: Outlets 2021-2024 Table 26 - Retail E-Commerce GBO Company Shares: % Value 2020-2024 Table 27 - Retail E-Commerce GBN Brand Shares: % Value 2021-2024 Table 28 - Grocery Retailers GBO Company Shares: % Value 2020-2024 Table 29 - Grocerv Retailers GBN Brand Shares: % Value 2021-2024 Table 30 - Grocery Retailers LBN Brand Shares: Outlets 2021-2024 Table 31 - Non-Grocery Retailers GBO Company Shares: % Value 2020-2024 Table 32 - Non-Grocery Retailers GBN Brand Shares: % Value 2021-2024 Table 33 - Non-Grocery Retailers LBN Brand Shares: Outlets 2021-2024 Table 34 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2024-2029 Table 35 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2024-2029 Table 36 - Forecast Sales in Retail Offline by Channel: Value 2024-2029

Table 37 - Forecast Sales in Retail Offline by Channel: % Value Growth 2024-2029 Table 38 - Forecast Retail Offline Outlets by Channel: Units 2024-2029 Table 39 - Forecast Retail Offline Outlets by Channel: % Unit Growth 2024-2029 Table 40 - Forecast Sales in Retail E-Commerce by Product: Value 2024-2029 Table 41 - Forecast Sales in Retail E-Commerce by Product: % Value Growth 2024-2029 Table 42 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2024-2029 Table 43 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029 Table 44 - Forecast Sales in Grocery Retailers by Channel: Value 2024-2029 Table 45 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2024-2029 Table 46 - Forecast Grocery Retailers Outlets by Channel: Units 2024-2029 Table 47 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2024-2029 Table 48 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2024-2029 Table 49 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029 Table 50 - Forecast Sales in Non-Grocery Retailers by Channel: Value 2024-2029 Table 51 - Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2024-2029 Table 52 - Forecast Non-Grocery Retailers Outlets by Channel: Units 2024-2029 Table 53 - Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2024-2029

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Convenience Retailers in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Slowdown due to return to normality, while rising number of rail journeys boosts convenience stores Shell & DEA remains largest player but Rewe Markt gains further ground Forecourt retailers dominate but convenience stores innovate

PROSPECTS AND OPPORTUNITIES

Challenges will force convenience retailers to adapt store format for greater differentiation Operational shifts likely to give greater prominence to major grocery retailers Switch to electric cars will force forecourt retailers to rethink current business model

CHANNEL DATA

- Table 54 Convenience Retailers: Value Sales, Outlets and Selling Space 2019-2024
- Table 55 Convenience Retailers: Value Sales, Outlets and Selling Space: % Growth 2019-2024
- Table 56 Sales in Convenience Retailers by Channel: Value 2019-2024
- Table 57 Sales in Convenience Retailers by Channel: % Value Growth 2019-2024
- Table 58 Convenience Retailers GBO Company Shares: % Value 2020-2024
- Table 59 Convenience Retailers GBN Brand Shares: % Value 2021-2024
- Table 60 Convenience Retailers LBN Brand Shares: Outlets 2021-2024
- Table 61 Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space 2024-2029
- Table 62 Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029
- Table 63 Forecast Sales in Convenience Retailers by Channel: Value 2024-2029
- Table 64 Forecast Sales in Convenience Retailers by Channel: % Value Growth 2024-2029

Supermarkets in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Supermarkets adjust strategies by responding to price challenges from discounters Two dominant players focus on strengthening distinct competitive advantages Loyalty scheme competition intensifies as Payback partner changes

PROSPECTS AND OPPORTUNITIES

Competing with discounters through premium products including organic, vegan food and local sourcing Adapting price positioning to macroeconomic conditions could boost consumer loyalty Two largest players set to develop e-commerce activities

CHANNEL DATA

Table 65 - Supermarkets: Value Sales, Outlets and Selling Space 2019-2024Table 66 - Supermarkets: Value Sales, Outlets and Selling Space: % Growth 2019-2024Table 67 - Supermarkets GBO Company Shares: % Value 2020-2024Table 68 - Supermarkets GBN Brand Shares: % Value 2021-2024Table 69 - Supermarkets LBN Brand Shares: Outlets 2021-2024Table 70 - Supermarkets Forecasts: Value Sales, Outlets and Selling Space 2024-2029Table 71 - Supermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Hypermarkets in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Closure of last Mein Real outlets adds to long-term challenges for hypermarkets Kaufland's dominance unchallenged despite gains by competitors Competitive pricing and premium positioning boost competitiveness of Kaufland's private label

PROSPECTS AND OPPORTUNITIES

Channel saturation but smaller hypermarkets offer some growth opportunities Omnichannel services to gain a competitive edge over pure-play e-commerce Local sourcing set to become key differentiator to competing with smaller store formats

CHANNEL DATA

- Table 72 Hypermarkets: Value Sales, Outlets and Selling Space 2019-2024
- Table 73 Hypermarkets: Value Sales, Outlets and Selling Space: % Growth 2019-2024
- Table 74 Hypermarkets GBO Company Shares: % Value 2020-2024
- Table 75 Hypermarkets GBN Brand Shares: % Value 2021-2024
- Table 76 Hypermarkets LBN Brand Shares: Outlets 2021-2024
- Table 77 Hypermarkets Forecasts: Value Sales, Outlets and Selling Space 2024-2029
- Table 78 Hypermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Discounters in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Discounters continues to expand extensive private label offer to outperform grocery retailers Competitive landscape largely unchanged in a concentrated channel Challenges in non-grocery offer forces focus on selected categories

PROSPECTS AND OPPORTUNITIES

Lack of expansion opportunities will encourage network optimisation and push into new types of store locations Tentative expansion in online grocery delivery and expansion of digital services Natural and organic food expected to play more prominent role

CHANNEL DATA

- Table 79 Discounters: Value Sales, Outlets and Selling Space 2019-2024
- Table 80 Discounters: Value Sales, Outlets and Selling Space: % Growth 2019-2024
- Table 81 Discounters GBO Company Shares: % Value 2020-2024
- Table 82 Discounters GBN Brand Shares: % Value 2021-2024
- Table 83 Discounters LBN Brand Shares: Outlets 2021-2024
- Table 84 Discounters Forecasts: Value Sales, Outlets and Selling Space 2024-2029
- Table 85 Discounters Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Small Local Grocers in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Stagnant sales as channel suffers from higher prices compared to other grocery formats Fragmented channel dominated by independents, but several chains lead Greater focus on unique services to retain customer base

PROSPECTS AND OPPORTUNITIES

Decline in outlet numbers and intense price competition set to impact future growth Reliance on nicotine and tobacco products likely to be reduced More services and differentiated product offering may help offset main challenges

CHANNEL DATA

Table 86 - Small Local Grocers: Value Sales, Outlets and Selling Space 2019-2024Table 87 - Small Local Grocers: Value Sales, Outlets and Selling Space: % Growth 2019-2024Table 88 - Small Local Grocers GBO Company Shares: % Value 2020-2024Table 89 - Small Local Grocers GBN Brand Shares: % Value 2021-2024Table 90 - Small Local Grocers LBN Brand Shares: Outlets 2021-2024Table 91 - Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space 2024-2029Table 92 - Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

General Merchandise Stores in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Variety stores continues on upwards growth trajectory Galeria continues to lose share while main competitors make gains Department store chain Galeria focuses on path to profitability to remain afloat

PROSPECTS AND OPPORTUNITIES

Variety stores set to record solid performance despite slowdown in growth No short-term relief for department stores due to significant challenges Closer integration of e-commerce with store-based activities expected

CHANNEL DATA

Table 93 - General Merchandise Stores: Value Sales, Outlets and Selling Space 2019-2024Table 94 - General Merchandise Stores: Value Sales, Outlets and Selling Space: % Growth 2019-2024Table 95 - Sales in General Merchandise Stores by Channel: Value 2019-2024Table 96 - Sales in General Merchandise Stores by Channel: % Value Growth 2019-2024Table 97 - General Merchandise Stores GBO Company Shares: % Value 2020-2024Table 98 - General Merchandise Stores GBN Brand Shares: % Value 2021-2024Table 99 - General Merchandise Stores LBN Brand Shares: Outlets 2021-2024

Table 100 - General Merchandise Stores Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 101 - General Merchandise Stores Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

 Table 102 - Forecast Sales in General Merchandise Stores by Channel: Value 2024-2029

Table 103 - Forecast Sales in General Merchandise Stores by Channel: % Value Growth 2024-2029

Apparel and Footwear Specialists in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Offline stores face decline amid cost pressures and shifting consumer preferences Zara and Takko perform well by adapting to consumer trends and economic shifts E-commerce's strength and the struggles of mid-market players

PROSPECTS AND OPPORTUNITIES

Future challenges amid economic pressures and shifting consumer habits Esprit's exit from local market set to reshape mid-market fashion Innovation and social commerce set to influence future strategies of apparel and footwear specialists

CHANNEL DATA

Table 104 - Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space 2019-2024Table 105 - Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space: % Growth 2019-2024Table 106 - Apparel and Footwear Specialists GBO Company Shares: % Value 2020-2024Table 107 - Apparel and Footwear Specialists GBN Brand Shares: % Value 2021-2024Table 108 - Apparel and Footwear Specialists LBN Brand Shares: Outlets 2021-2024Table 109 - Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space 2024-2029Table 110 - Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Appliances and Electronics Specialists in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

E-commerce growth drives decline of store sales and function shift of outlets Media-Saturn-Holding GmbH strengthens leadership, with low number of smaller brands growing Brand success heavily depends on in-store consumer experience

PROSPECTS AND OPPORTUNITIES

Continual sales decline due to further growth for appliances and electronics e-commerce Innovations in delivery will shape market dynamics Right to Repair will increase importance of repair services in appliances and electronics specialists

CHANNEL DATA

Table 111 - Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space 2019-2024

Table 112 - Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space: % Growth 2019-2024

 Table 113 - Appliances and Electronics Specialists GBO Company Shares: % Value 2020-2024

Table 114 - Appliances and Electronics Specialists GBN Brand Shares: % Value 2021-2024

Table 115 - Appliances and Electronics Specialists LBN Brand Shares: Outlets 2021-2024

Table 116 - Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 117 - Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Home Products Specialists in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Home improvement and gardening stores suffer from poor weather conditions Homewares and home furnishings stores faces further challenges Pet shops and superstores remains strongest performer overall

PROSPECTS AND OPPORTUNITIES

Number of outlets set to further fall, but value decline will start to ease Sustainability versus acquisition for homewares and home furnishing stores Facilitating purchases and developing stores to remain key strategies

CHANNEL DATA

Table 118 - Home Products Specialists: Value Sales, Outlets and Selling Space 2019-2024
Table 119 - Home Products Specialists: Value Sales, Outlets and Selling Space: % Growth 2019-2024
Table 120 - Sales in Home Products Specialists by Channel: Value 2019-2024
Table 121 - Sales in Home Products Specialists by Channel: % Value Growth 2019-2024
Table 122 - Home Products Specialists GBO Company Shares: % Value 2020-2024
Table 123 - Home Products Specialists GBN Brand Shares: % Value 2021-2024
Table 124 - Home Products Specialists LBN Brand Shares: Outlets 2021-2024
Table 125 - Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space 2024-2029
Table 126 - Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029
Table 127 - Forecast Sales in Home Products Specialists by Channel: Value 2024-2029
Table 128 - Forecast Sales in Home Products Specialists by Channel: % Value Growth 2024-2029

Health and Beauty Specialists in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sales of beauty specialists continue to recover in 2024 Health concerns support sales of pharmacies and optical goods stores Wide price range benefits health and personal care stores

PROSPECTS AND OPPORTUNITIES

Positive outlook for health and beauty specialists in Germany Challenges in the competitive landscape of pharmacies Differentiation and loyalty set to become increasingly important

CHANNEL DATA

Table 129 - Health and Beauty Specialists: Value Sales, Outlets and Selling Space 2019-2024
Table 130 - Health and Beauty Specialists: Value Sales, Outlets and Selling Space: % Growth 2019-2024
Table 131 - Sales in Health and Beauty Specialists by Channel: Value 2019-2024
Table 132 - Sales in Health and Beauty Specialists by Channel: % Value Growth 2019-2024
Table 133 - Health and Beauty Specialists GBO Company Shares: % Value 2020-2024
Table 134 - Health and Beauty Specialists GBN Brand Shares: % Value 2021-2024
Table 135 - Health and Beauty Specialists LBN Brand Shares: Outlets 2021-2024
Table 136 - Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space 2024-2029
Table 137 - Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029
Table 138 - Forecast Sales in Health and Beauty Specialists by Channel: Value 2024-2029
Table 139 - Forecast Sales in Health and Beauty Specialists by Channel: Value 2024-2029

Vending in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Tobacco vending decline undermines channel's performance Tobaccoland consolidates its overall lead in 2024 Broader food assortment to encompass greater variety of snacking options

PROSPECTS AND OPPORTUNITIES

Healthier snacking options and alternative nicotine products set to become more widely available Consumer electronics and other non-food products offer opportunities for impulse purchases "Smarter" vending concepts may help offset competition from convenience retailers

CHANNEL DATA

Table 140 - Vending by Product: Value 2019-2024Table 141 - Vending by Product: % Value Growth 2019-2024Table 142 - Vending GBO Company Shares: % Value 2020-2024Table 143 - Vending GBN Brand Shares: % Value 2021-2024Table 144 - Vending Forecasts by Product: Value 2024-2029Table 145 - Vending Forecasts by Product: % Value Growth 2024-2029

Direct Selling in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Direct selling sales approach stagnation in Germany Major exit illustrates shift away from direct selling towards retail e-commerce Health and beauty products remain a pillar of direct selling model in Germany

PROSPECTS AND OPPORTUNITIES

Stagnation for direct selling as competition from retail e-commerce intensifies Embracing the digital aspects will be crucial to survival More consolidated competitive landscape ahead likely

CHANNEL DATA

Table 146 - Direct Selling by Product: Value 2019-2024Table 147 - Direct Selling by Product: % Value Growth 2019-2024Table 148 - Direct Selling GBO Company Shares: % Value 2020-2024Table 149 - Direct Selling GBN Brand Shares: % Value 2021-2024Table 150 - Direct Selling Forecasts by Product: Value 2024-2029Table 151 - Direct Selling Forecasts by Product: % Value Growth 2024-2029

Retail E-Commerce in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Retail e-commerce benefits from advanced technologies Rising competition within retail e-commerce landscape: Exits and entrants Convenience and price orientation remain key for retail e-commerce

PROSPECTS AND OPPORTUNITIES

Further growth expected for retail e-commerce in Germany Highlighting unique value to compete with budget brands Facilitating online sales with even greater convenience

CHANNEL DATA

- Table 152 Retail E-Commerce by Channel: Value 2019-2024
- Table 153 Retail E-Commerce by Channel: % Value Growth 2019-2024
- Table 154 Retail E-Commerce by Product: Value 2019-2024
- Table 155 Retail E-Commerce by Product: % Value Growth 2019-2024
- Table 156 Retail E-Commerce GBO Company Shares: % Value 2020-2024
- Table 157 Retail E-Commerce GBN Brand Shares: % Value 2021-2024
- Table 158 Forecast Retail E-Commerce by Channel: Value 2024-2029
- Table 159 Forecast Retail E-Commerce by Channel: % Value Growth 2024-2029
- Table 160 Forecast Retail E-Commerce by Product: Value 2024-2029
- Table 161 Forecast Retail E-Commerce by Product: % Value Growth 2024-2029

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus
 of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/retail-in-germany/report.