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Retail in Germany

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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

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

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

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

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

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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
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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

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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

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

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

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

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