



Retail in Slovenia

April 2023

Table of Contents

EXECUTIVE SUMMARY

Retail in 2022: The big picture

Informal retail

What next for retail?

MARKET DATA

Table 1 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2017-2022

Table 2 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2017-2022

Table 3 - Sales in Retail Offline by Channel: Value 2017-2022

Table 4 - Sales in Retail Offline by Channel: % Value Growth 2017-2022

Table 5 - Retail Offline Outlets by Channel: Units 2017-2022

Table 6 - Retail Offline Outlets by Channel: % Unit Growth 2017-2022

Table 7 - Retail GBO Company Shares: % Value 2018-2022

Table 8 - Retail GBN Brand Shares: % Value 2019-2022

Table 9 - Retail Offline GBO Company Shares: % Value 2018-2022

Table 10 - Retail Offline GBN Brand Shares: % Value 2019-2022

Table 11 - Retail Offline LBN Brand Shares: Outlets 2019-2022

Table 12 - Retail E-Commerce GBO Company Shares: % Value 2018-2022

Table 13 - Retail E-Commerce GBN Brand Shares: % Value 2019-2022

Table 14 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2022-2027

Table 15 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2022-2027

Table 16 - Forecast Sales in Retail Offline by Channel: Value 2022-2027

Table 17 - Forecast Sales in Retail Offline by Channel: % Value Growth 2022-2027

Table 18 - Forecast Retail Offline Outlets by Channel: Units 2022-2027

Table 19 - Forecast Retail Offline Outlets by Channel: % Unit Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Grocery Retailers in Slovenia

KEY DATA FINDINGS

2022 DEVELOPMENTS

MOL Group sells 39 service stations to Shell in Slovenia in 2023, to strengthen its position in a booming channel

Investors aim for acquisitions of Mercator and Tuš, while Mercator-CG seeks to acquire Supermarketi Franca

Traditional retailers face challenges in an evolving, modernised category

PROSPECTS AND OPPORTUNITIES

Convenience stores tipped for success, as players in the channel expand their product portfolios

Sustainability trends set to drive players' strategies and consumers' shopping behaviour

Discounters set to benefit should inflationary pressures continue longer than anticipated

CHANNEL DATA

Table 20 - Grocery Retailers: Value Sales, Outlets and Selling Space 2017-2022

Table 21 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2017-2022

Table 22 - Sales in Grocery Retailers by Channel: Value 2017-2022

Table 23 - Sales in Grocery Retailers by Channel: % Value Growth 2017-2022

Table 24 - Grocery Retailers Outlets by Channel: Units 2017-2022

Table 25 - Grocery Retailers Outlets by Channel: % Unit Growth 2017-2022

- Table 26 - Grocery Retailers GBO Company Shares: % Value 2018-2022
- Table 27 - Grocery Retailers GBN Brand Shares: % Value 2019-2022
- Table 28 - Grocery Retailers LBN Brand Shares: Outlets 2019-2022
- Table 29 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2022-2027
- Table 30 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027
- Table 31 - Forecast Sales in Grocery Retailers by Channel: Value 2022-2027
- Table 32 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2022-2027
- Table 33 - Forecast Grocery Retailers Outlets by Channel: Units 2022-2027
- Table 34 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2022-2027

Non-Grocery Retailers in Slovenia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Non-grocery retail sees a robust ongoing recovery, thanks to the beneficial economic situation in Slovenia and reopening of tourism
 Acquisitions and new store openings are a persistent trend, heralding ongoing opportunities
 Sustainability trends also seen in non-grocery retail, with second-hand apparel competing with fast-fashion brands

PROSPECTS AND OPPORTUNITIES

Steady ongoing growth expected, with health trends, convenience, and affordability driving shopping behaviours
 Beauty specialist Douglas launches in Slovenia, with more new players expected to follow over the forecast period
 Omnichannel strategies will become increasingly important as e-commerce set to remain relevant following its pandemic boom

CHANNEL DATA

- Table 35 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2017-2022
- Table 36 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2017-2022
- Table 37 - Non-Grocery Retailers GBO Company Shares: % Value 2018-2022
- Table 38 - Non-Grocery Retailers GBN Brand Shares: % Value 2019-2022
- Table 39 - Non-Grocery Retailers LBN Brand Shares: Outlets 2019-2022
- Table 40 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2022-2027
- Table 41 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027
- Table 42 - Forecast Sales in Non-Grocery Retailers by Channel: Value 2022-2027
- Table 43 - Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2022-2027
- Table 44 - Forecast Non-Grocery Retailers Outlets by Channel: Units 2022-2027
- Table 45 - Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2022-2027

Direct Selling in Slovenia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Direct selling sees ongoing, albeit somewhat muted, growth, while players embrace an omnichannel strategy
 Changing behaviours mean e-commerce poses a notable threat to direct selling
 Direct selling continues to attract sellers who lost their jobs or seek a secondary income stream

PROSPECTS AND OPPORTUNITIES

Challenges set to remain for direct selling
 Tighter EU legislations regarding direct marketing will further limit performance
 Inventive use of online options could lead to opportunities for online sellers

CHANNEL DATA

- Table 46 - Direct Selling by Product: Value 2017-2022
- Table 47 - Direct Selling by Product: % Value Growth 2017-2022

Table 48 - Direct Selling GBO Company Shares: % Value 2018-2022

Table 49 - Direct Selling GBN Brand Shares: % Value 2019-2022

Table 50 - Direct Selling Forecasts by Product: Value 2022-2027

Table 51 - Direct Selling Forecasts by Product: % Value Growth 2022-2027

Retail E-Commerce in Slovenia

KEY DATA FINDINGS

2022 DEVELOPMENTS

E-commerce is the big winner, as Big Bang takes home the coveted Adriatic Champion Award for the second year running

Expansions and acquisitions offer win-win success for platforms and brands alike, with fashion a major area to watch

Third-party merchants remain notable in e-commerce

PROSPECTS AND OPPORTUNITIES

E-commerce will continue to develop over the forecast period

Financial and technological innovations will help to support ongoing growth

Secure payment structures will remain a crucial key to developments, with crypto tipped to be an area to watch

CHANNEL DATA

Table 52 - Retail E-Commerce by Product: Value 2017-2022

Table 53 - Retail E-Commerce by Product: % Value Growth 2017-2022

Table 54 - Retail E-Commerce GBO Company Shares: % Value 2018-2022

Table 55 - Retail E-Commerce GBN Brand Shares: % Value 2019-2022

Table 56 - Forecast Retail E-Commerce by Product: Value 2022-2027

Table 57 - Forecast Retail E-Commerce by Product: % Value Growth 2022-2027

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-slovenia/report.