

# Food and Drink E-Commerce in Germany

May 2022

Table of Contents

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Growth in food and drink e-commerce continues in 2021  
Impulse grocery delivery start-ups shake up the competitive landscape  
Traditional retailers and services pivot to incorporate more e-commerce offerings

#### PROSPECTS AND OPPORTUNITIES

Work flexibility and growing digitalisation expected to maintain opportunities  
Mergers and acquisitions activity likely in the years ahead  
E-commerce strategies likely to impact in-store options

#### CHANNEL DATA

Table 1 - Food and Drink E-Commerce: Value 2016-2021  
Table 2 - Food and Drink E-Commerce: % Value Growth 2016-2021  
Table 3 - Food and Drink E-Commerce Forecasts: Value 2021-2026  
Table 4 - Food and Drink E-Commerce Forecasts: % Value Growth 2021-2026

## Retailing in Germany - Industry Overview

### EXECUTIVE SUMMARY

Retailing in 2021: The big picture  
Pandemic-induced e-commerce surge continues  
Variety stores an outlier amidst sluggish recovery for store-based retailers  
What next for retailing?

### OPERATING ENVIRONMENT

Informal retailing  
Opening hours  
Summary 1 - Standard Opening Hours by Channel Type 2021  
Physical retail landscape  
Cash and carry  
Table 5 - Cash and Carry Sales: Value 2016-2021  
Seasonality  
Christmas  
Summer sales  
Payments  
Delivery and collection  
Emerging business models

### MARKET DATA

Table 6 - Sales in Retailing by Store-based vs Non-Store: Value 2016-2021  
Table 7 - Sales in Retailing by Store-based vs Non-Store: % Value Growth 2016-2021  
Table 8 - Sales in Store-based Retailing by Channel: Value 2016-2021  
Table 9 - Sales in Store-based Retailing by Channel: % Value Growth 2016-2021  
Table 10 - Store-based Retailing Outlets by Channel: Units 2016-2021  
Table 11 - Store-based Retailing Outlets by Channel: % Unit Growth 2016-2021  
Table 12 - Sales in Non-Store Retailing by Channel: Value 2016-2021  
Table 13 - Sales in Non-Store Retailing by Channel: % Value Growth 2016-2021  
Table 14 - Grocery Retailers: Value Sales, Outlets and Selling Space 2016-2021  
Table 15 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021  
Table 16 - Sales in Grocery Retailers by Channel: Value 2016-2021

Table 17 - Sales in Grocery Retailers by Channel: % Value Growth 2016-2021

Table 18 - Grocery Retailers Outlets by Channel: Units 2016-2021

Table 19 - Grocery Retailers Outlets by Channel: % Unit Growth 2016-2021

Table 20 - Non-Grocery Specialists: Value Sales, Outlets and Selling Space 2016-2021

Table 21 - Non-Grocery Specialists: Value Sales, Outlets and Selling Space: % Growth 2016-2021

Table 22 - Sales in Non-Grocery Specialists by Channel: Value 2016-2021

Table 23 - Sales in Non-Grocery Specialists by Channel: % Value Growth 2016-2021

Table 24 - Non-Grocery Specialists Outlets by Channel: Units 2016-2021

Table 25 - Non-Grocery Specialists Outlets by Channel: % Unit Growth 2016-2021

Table 26 - Mixed Retailers: Value Sales, Outlets and Selling Space 2016-2021

Table 27 - Mixed Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021

Table 28 - Sales in Mixed Retailers by Channel: Value 2016-2021

Table 29 - Sales in Mixed Retailers by Channel: % Value Growth 2016-2021

Table 30 - Mixed Retailers Outlets by Channel: Units 2016-2021

Table 31 - Mixed Retailers Outlets by Channel: % Unit Growth 2016-2021

Table 32 - Retailing GBO Company Shares: % Value 2017-2021

Table 33 - Retailing GBN Brand Shares: % Value 2018-2021

Table 34 - Store-based Retailing GBO Company Shares: % Value 2017-2021

Table 35 - Store-based Retailing GBN Brand Shares: % Value 2018-2021

Table 36 - Store-based Retailing LBN Brand Shares: Outlets 2018-2021

Table 37 - Non-Store Retailing GBO Company Shares: % Value 2017-2021

Table 38 - Non-Store Retailing GBN Brand Shares: % Value 2018-2021

Table 39 - Grocery Retailers GBO Company Shares: % Value 2017-2021

Table 40 - Grocery Retailers GBN Brand Shares: % Value 2018-2021

Table 41 - Grocery Retailers LBN Brand Shares: Outlets 2018-2021

Table 42 - Grocery Retailers LBN Brand Shares: Selling Space 2018-2021

Table 43 - Non-Grocery Specialists GBO Company Shares: % Value 2017-2021

Table 44 - Non-Grocery Specialists GBN Brand Shares: % Value 2018-2021

Table 45 - Non-Grocery Specialists LBN Brand Shares: Outlets 2018-2021

Table 46 - Non-Grocery Specialists LBN Brand Shares: Selling Space 2018-2021

Table 47 - Mixed Retailers GBO Company Shares: % Value 2017-2021

Table 48 - Mixed Retailers GBN Brand Shares: % Value 2018-2021

Table 49 - Mixed Retailers LBN Brand Shares: Outlets 2018-2021

Table 50 - Mixed Retailers LBN Brand Shares: Selling Space 2018-2021

Table 51 - Forecast Sales in Retailing by Store-based vs Non-Store: Value 2021-2026

Table 52 - Forecast Sales in Retailing by Store-based vs Non-Store: % Value Growth 2021-2026

Table 53 - Forecast Sales in Store-based Retailing by Channel: Value 2021-2026

Table 54 - Forecast Sales in Store-based Retailing by Channel: % Value Growth 2021-2026

Table 55 - Forecast Store-based Retailing Outlets by Channel: Units 2021-2026

Table 56 - Forecast Store-Based Retailing Outlets by Channel: % Unit Growth 2021-2026

Table 57 - Forecast Sales in Non-Store Retailing by Channel: Value 2021-2026

Table 58 - Forecast Sales in Non-Store Retailing by Channel: % Value Growth 2021-2026

Table 59 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026

Table 60 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

Table 61 - Forecast Sales in Grocery Retailers by Channel: Value 2021-2026

Table 62 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2021-2026

Table 63 - Forecast Grocery Retailers Outlets by Channel: Units 2021-2026

Table 64 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2021-2026

Table 65 - Non-Grocery Specialists Forecasts: Value Sales, Outlets and Selling Space 2021-2026

Table 66 - Non-Grocery Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

Table 67 - Forecast Sales in Non-Grocery Specialists by Channel: Value 2021-2026

Table 68 - Forecast Sales in Non-Grocery Specialists by Channel: % Value Growth 2021-2026

Table 69 - Forecast Non-Grocery Specialists Outlets by Channel: Units 2021-2026

Table 70 - Forecast Non-Grocery Specialists Outlets by Channel: % Unit Growth 2021-2026

Table 71 - Mixed Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026

Table 72 - Mixed Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

Table 73 - Forecast Sales in Mixed Retailers by Channel: Value 2021-2026

Table 74 - Forecast Sales in Mixed Retailers by Channel: % Value Growth 2021-2026

Table 75 - Forecast Mixed Retailers Outlets by Channel: Units 2021-2026

Table 76 - Forecast Mixed Retailers Outlets by Channel: % Unit Growth 2021-2026

## DISCLAIMER

## SOURCES

Summary 2 - Research Sources

### 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/food-and-drink-e-commerce-in-germany/report](http://www.euromonitor.com/food-and-drink-e-commerce-in-germany/report).