

# Convenience Stores in Germany

May 2022

**Table of Contents** 

## Convenience Stores in Germany - Category analysis

### **KEY DATA FINDINGS**

#### 2021 DEVELOPMENTS

Demand remains strong in residential areas, less so in transit hubs

Expansion strategies shift away from downtown urban locations

Forecourt retailers enjoys a slow return to normality

## PROSPECTS AND OPPORTUNITIES

High expectations for retail in German transit hubs

Convenience stores leads the push to digitise retailing in Germany

Rewe's forecourt retail strategy boosted by takeover of wholesaler Lekkerland

### CHANNEL DATA

Table 1 - Convenience Stores: Value Sales, Outlets and Selling Space 2016-2021

Table 2 - Convenience Stores: Value Sales, Outlets and Selling Space: % Growth 2016-2021

Table 3 - Convenience Stores GBO Company Shares: % Value 2017-2021

Table 4 - Convenience Stores GBN Brand Shares: % Value 2018-2021

Table 5 - Convenience Stores LBN Brand Shares: Outlets 2018-2021

Table 6 - Convenience Stores LBN Brand Shares: Selling Space 2018-2021

Table 7 - Convenience Stores Forecasts: Value Sales, Outlets and Selling Space 2021-2026

Table 8 - Convenience Stores Forecasts: Value Sales, Outlets and Selling Space: % 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 9 - Cash and Carry Sales: Value 2016-2021

Seasonality

Christmas

Summer sales

Payments

Delivery and collection

Emerging business models

### MARKET DATA

Table 10 - Sales in Retailing by Store-based vs Non-Store: Value 2016-2021

Table 11 - Sales in Retailing by Store-based vs Non-Store: % Value Growth 2016-2021

Table 12 - Sales in Store-based Retailing by Channel: Value 2016-2021

Table 13 - Sales in Store-based Retailing by Channel: % Value Growth 2016-2021

Table 14 - Store-based Retailing Outlets by Channel: Units 2016-2021

Table 15 - Store-based Retailing Outlets by Channel: % Unit Growth 2016-2021

Table 16 - Sales in Non-Store Retailing by Channel: Value 2016-2021

- Table 17 Sales in Non-Store Retailing by Channel: % Value Growth 2016-2021
- Table 18 Grocery Retailers: Value Sales, Outlets and Selling Space 2016-2021
- Table 19 Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021
- Table 20 Sales in Grocery Retailers by Channel: Value 2016-2021
- Table 21 Sales in Grocery Retailers by Channel: % Value Growth 2016-2021
- Table 22 Grocery Retailers Outlets by Channel: Units 2016-2021
- Table 23 Grocery Retailers Outlets by Channel: % Unit Growth 2016-2021
- Table 24 Non-Grocery Specialists: Value Sales, Outlets and Selling Space 2016-2021
- Table 25 Non-Grocery Specialists: Value Sales, Outlets and Selling Space: % Growth 2016-2021
- Table 26 Sales in Non-Grocery Specialists by Channel: Value 2016-2021
- Table 27 Sales in Non-Grocery Specialists by Channel: % Value Growth 2016-2021
- Table 28 Non-Grocery Specialists Outlets by Channel: Units 2016-2021
- Table 29 Non-Grocery Specialists Outlets by Channel: % Unit Growth 2016-2021
- Table 30 Mixed Retailers: Value Sales, Outlets and Selling Space 2016-2021
- Table 31 Mixed Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021
- Table 32 Sales in Mixed Retailers by Channel: Value 2016-2021
- Table 33 Sales in Mixed Retailers by Channel: % Value Growth 2016-2021
- Table 34 Mixed Retailers Outlets by Channel: Units 2016-2021
- Table 35 Mixed Retailers Outlets by Channel: % Unit Growth 2016-2021
- Table 36 Retailing GBO Company Shares: % Value 2017-2021
- Table 37 Retailing GBN Brand Shares: % Value 2018-2021
- Table 38 Store-based Retailing GBO Company Shares: % Value 2017-2021
- Table 39 Store-based Retailing GBN Brand Shares: % Value 2018-2021
- Table 40 Store-based Retailing LBN Brand Shares: Outlets 2018-2021
- Table 41 Non-Store Retailing GBO Company Shares: % Value 2017-2021
- Table 42 Non-Store Retailing GBN Brand Shares: % Value 2018-2021
- Table 43 Grocery Retailers GBO Company Shares: % Value 2017-2021
- Table 44 Grocery Retailers GBN Brand Shares: % Value 2018-2021
- Table 45 Grocery Retailers LBN Brand Shares: Outlets 2018-2021
- Table 46 Grocery Retailers LBN Brand Shares: Selling Space 2018-2021
- Table 47 Non-Grocery Specialists GBO Company Shares: % Value 2017-2021
- Table 48 Non-Grocery Specialists GBN Brand Shares: % Value 2018-2021
- Table 49 Non-Grocery Specialists LBN Brand Shares: Outlets 2018-2021
- Table 50 Non-Grocery Specialists LBN Brand Shares: Selling Space 2018-2021
- Table 51 Mixed Retailers GBO Company Shares: % Value 2017-2021
- Table 52 Mixed Retailers GBN Brand Shares: % Value 2018-2021
- Table 53 Mixed Retailers LBN Brand Shares: Outlets 2018-2021
- Table 54 Mixed Retailers LBN Brand Shares: Selling Space 2018-2021
- Table 55 Forecast Sales in Retailing by Store-based vs Non-Store: Value 2021-2026
- Table 56 Forecast Sales in Retailing by Store-based vs Non-Store: % Value Growth 2021-2026
- Table 57 Forecast Sales in Store-based Retailing by Channel: Value 2021-2026
- Table 58 Forecast Sales in Store-based Retailing by Channel: % Value Growth 2021-2026
- Table 59 Forecast Store-based Retailing Outlets by Channel: Units 2021-2026
- Table 60 Forecast Store-Based Retailing Outlets by Channel: % Unit Growth 2021-2026
- Table 61 Forecast Sales in Non-Store Retailing by Channel: Value 2021-2026
- Table 62 Forecast Sales in Non-Store Retailing by Channel: % Value Growth 2021-2026
- Table 63 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026
- Table 64 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026
- Table 65 Forecast Sales in Grocery Retailers by Channel: Value 2021-2026
- Table 66 Forecast Sales in Grocery Retailers by Channel: % Value Growth 2021-2026
- Table 67 Forecast Grocery Retailers Outlets by Channel: Units 2021-2026
- Table 68 Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2021-2026

- Table 69 Non-Grocery Specialists Forecasts: Value Sales, Outlets and Selling Space 2021-2026
- Table 70 Non-Grocery Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026
- Table 71 Forecast Sales in Non-Grocery Specialists by Channel: Value 2021-2026
- Table 72 Forecast Sales in Non-Grocery Specialists by Channel: % Value Growth 2021-2026
- Table 73 Forecast Non-Grocery Specialists Outlets by Channel: Units 2021-2026
- Table 74 Forecast Non-Grocery Specialists Outlets by Channel: % Unit Growth 2021-2026
- Table 75 Mixed Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026
- Table 76 Mixed Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026
- Table 77 Forecast Sales in Mixed Retailers by Channel: Value 2021-2026
- Table 78 Forecast Sales in Mixed Retailers by Channel: % Value Growth 2021-2026
- Table 79 Forecast Mixed Retailers Outlets by Channel: Units 2021-2026
- Table 80 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/convenience-stores-in-germany/report.