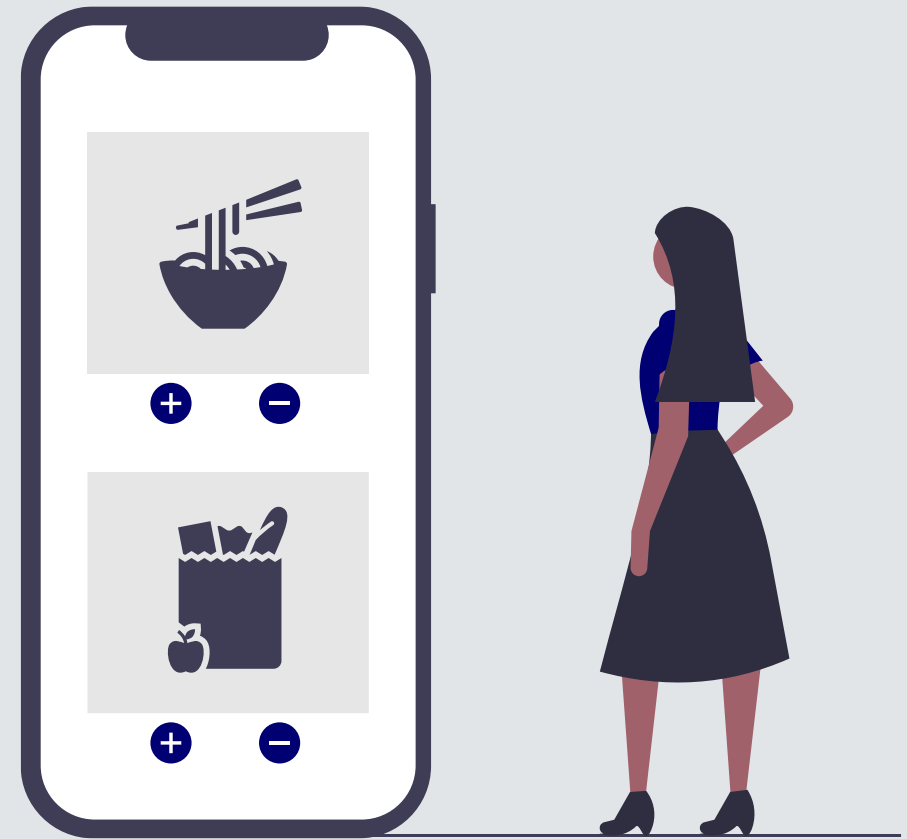


# FOOD RETAIL AND FOOD SERVICE IN GERMANY

BEFORE, DURING AND AFTER COVID-19

13.04.2021

Max-Henrik Fabian, IFH KÖLN



## IFH KÖLN

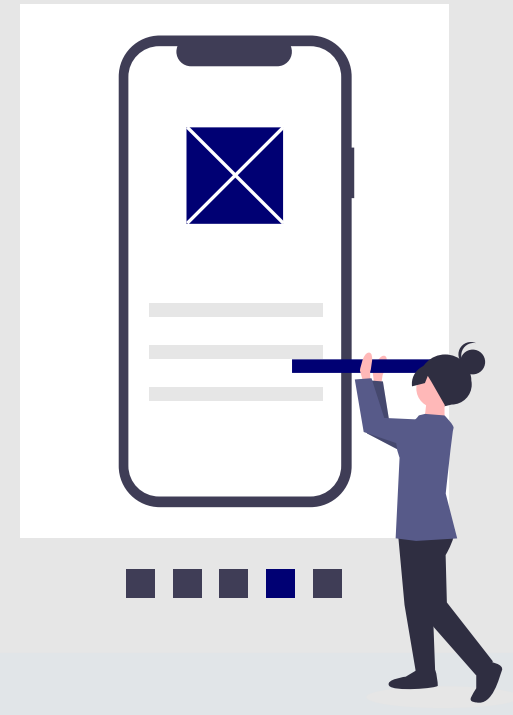
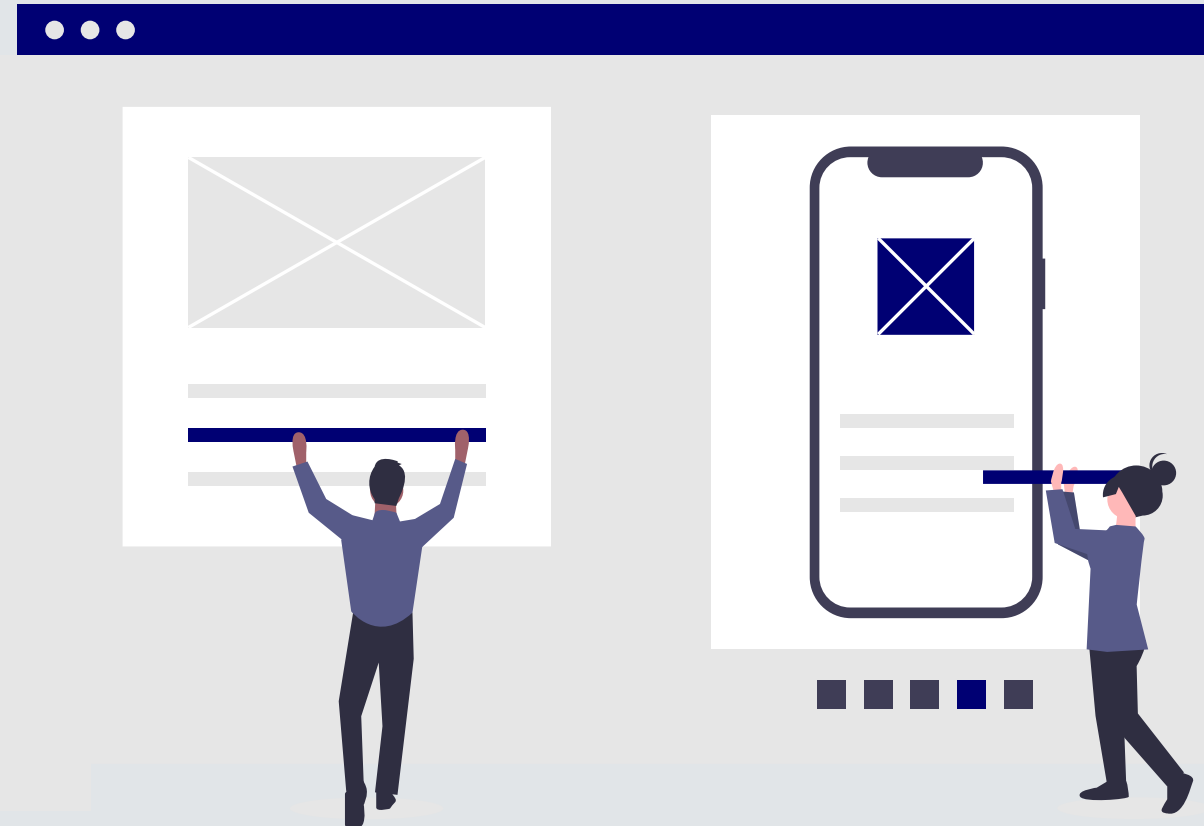
Erfolgreich im Handeln

The **Institut für Handelsforschung** IFH KÖLN is a market research and consulting company in the retail sector.

Market trends, customer behavior and competitive developments are analyzed using thorough methods. Based on this, sales, retail and location strategies are developed, implemented and monitored with the aim of making companies more successful in the retail environment.

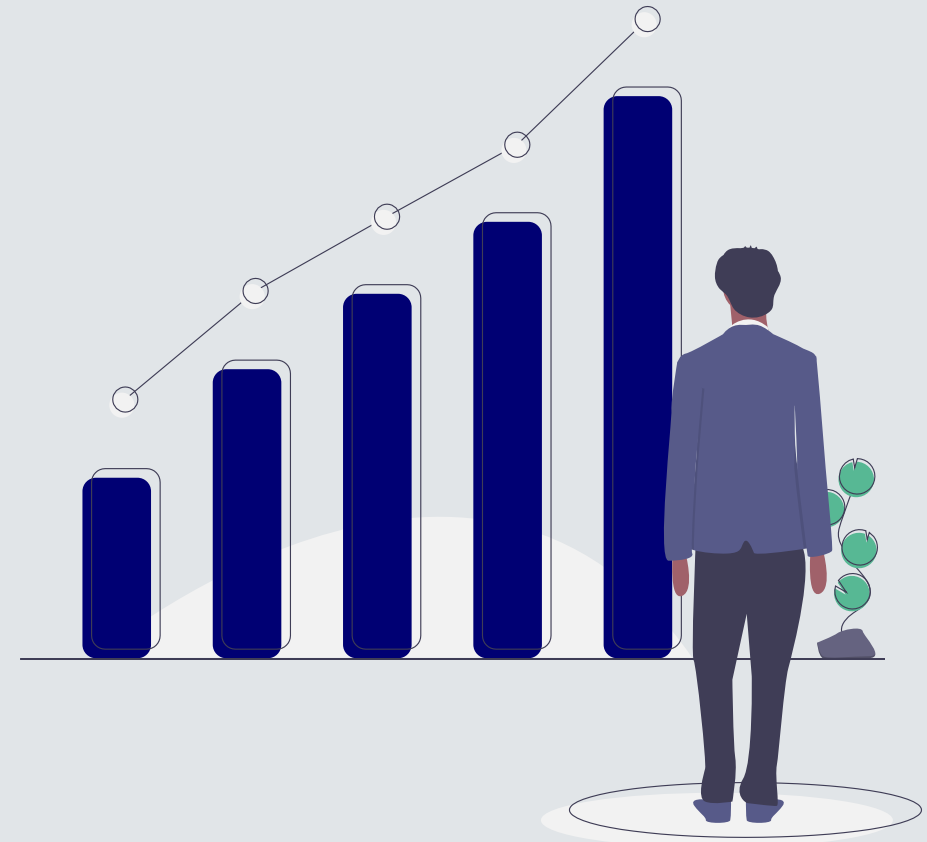
The transfer of knowledge within and for the industry is achieved through our own networks, published studies, lectures and industry-wide recognized events.

**#understand #plan #make #share**



1

**STARTING POINT  
BEFORE CORONA**

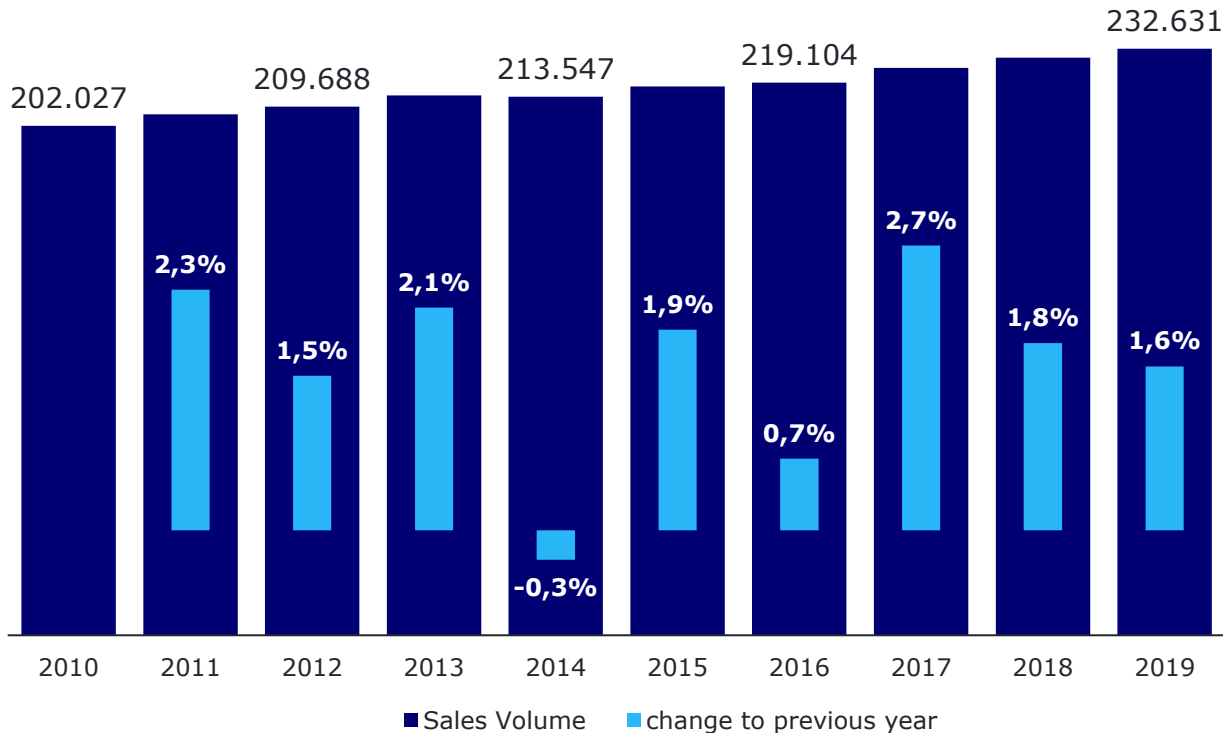


German food market with stable development and high value, also in international comparison

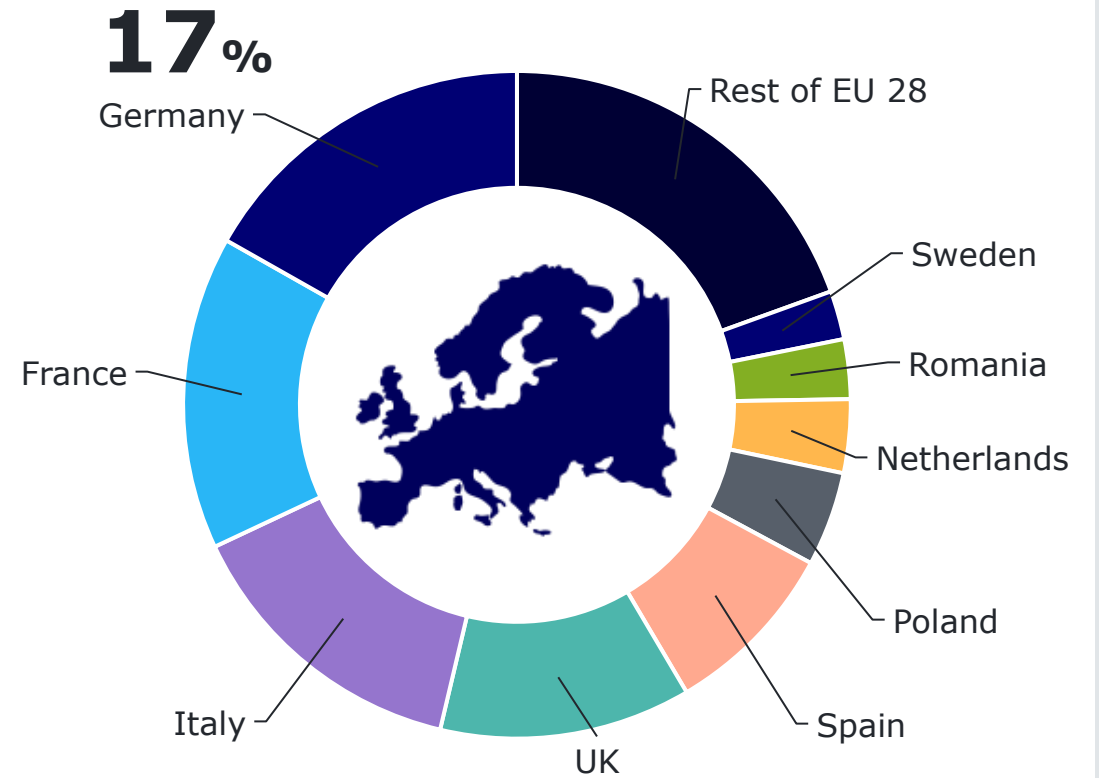
## Sales volume german food market

compound annual growth rate 2010-2019

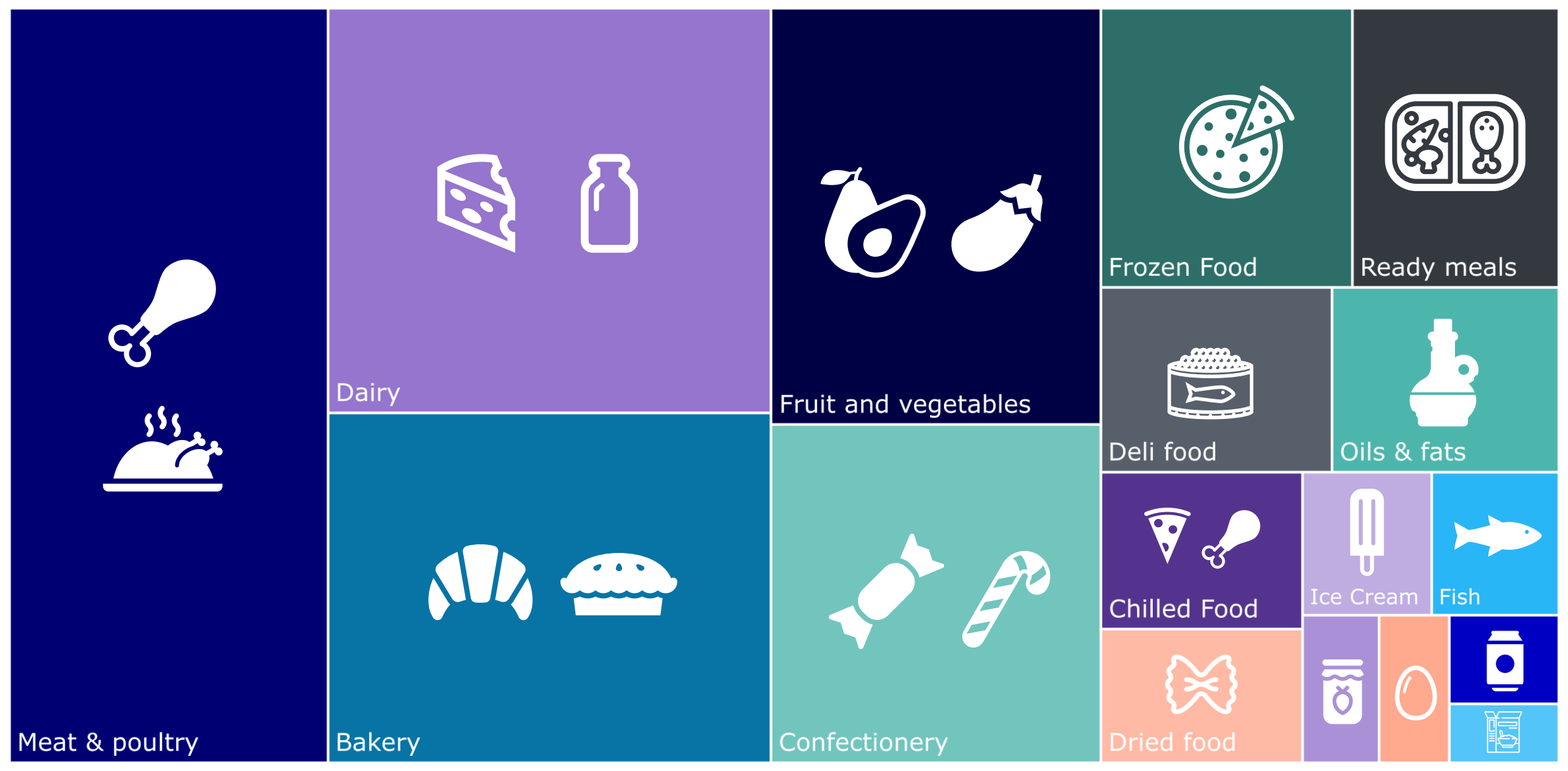
**+1,6%** p.a. sales revenue in germany



## Consumer spendings EU (food, beverages, tobacco)

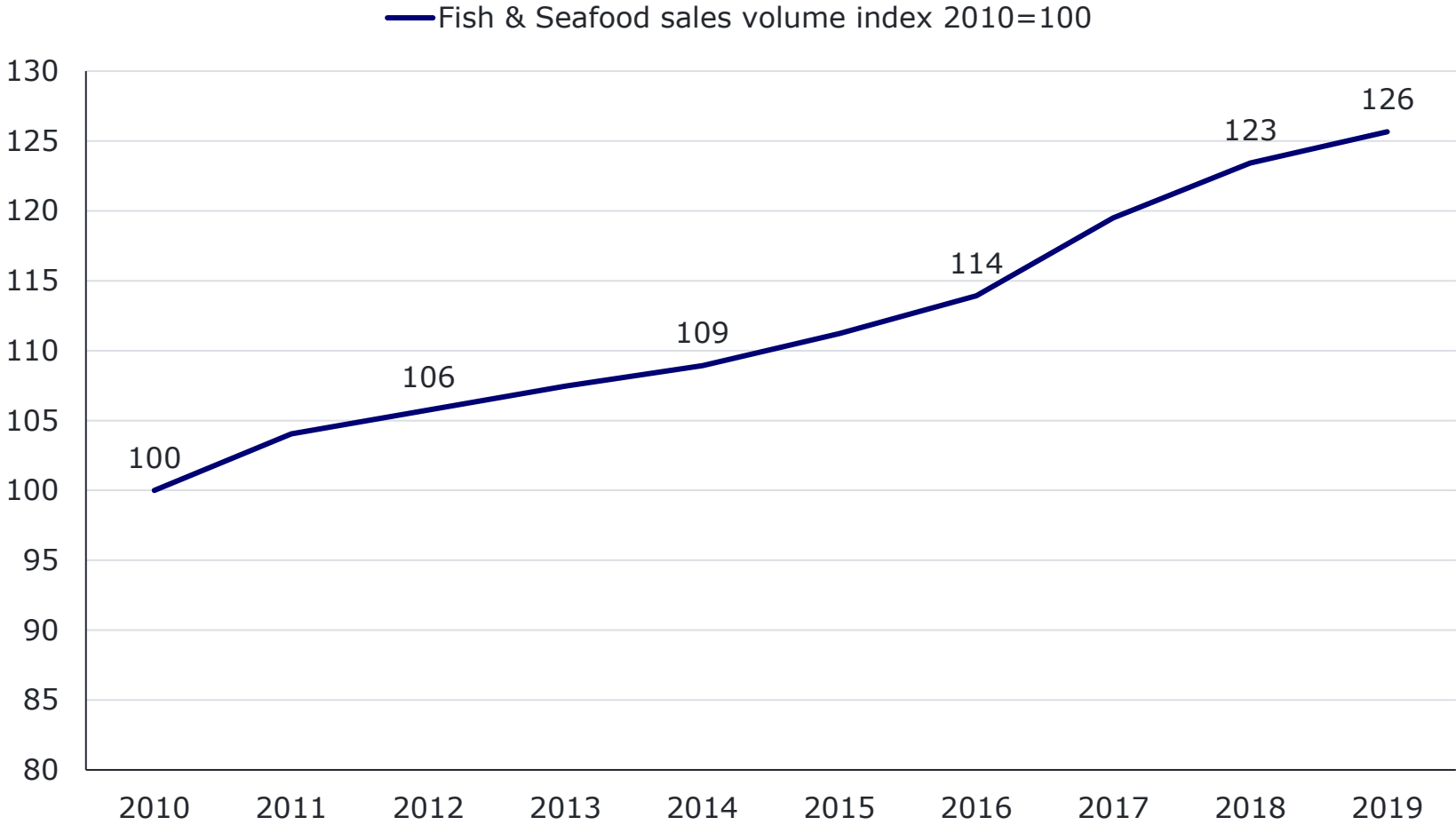


# COMMODITY GROUPS FOOD MARKET GERMANY (SELECTION)





**Fish and seafood are a growth market in the German food retail sector, outperforming the growth of the overall market**



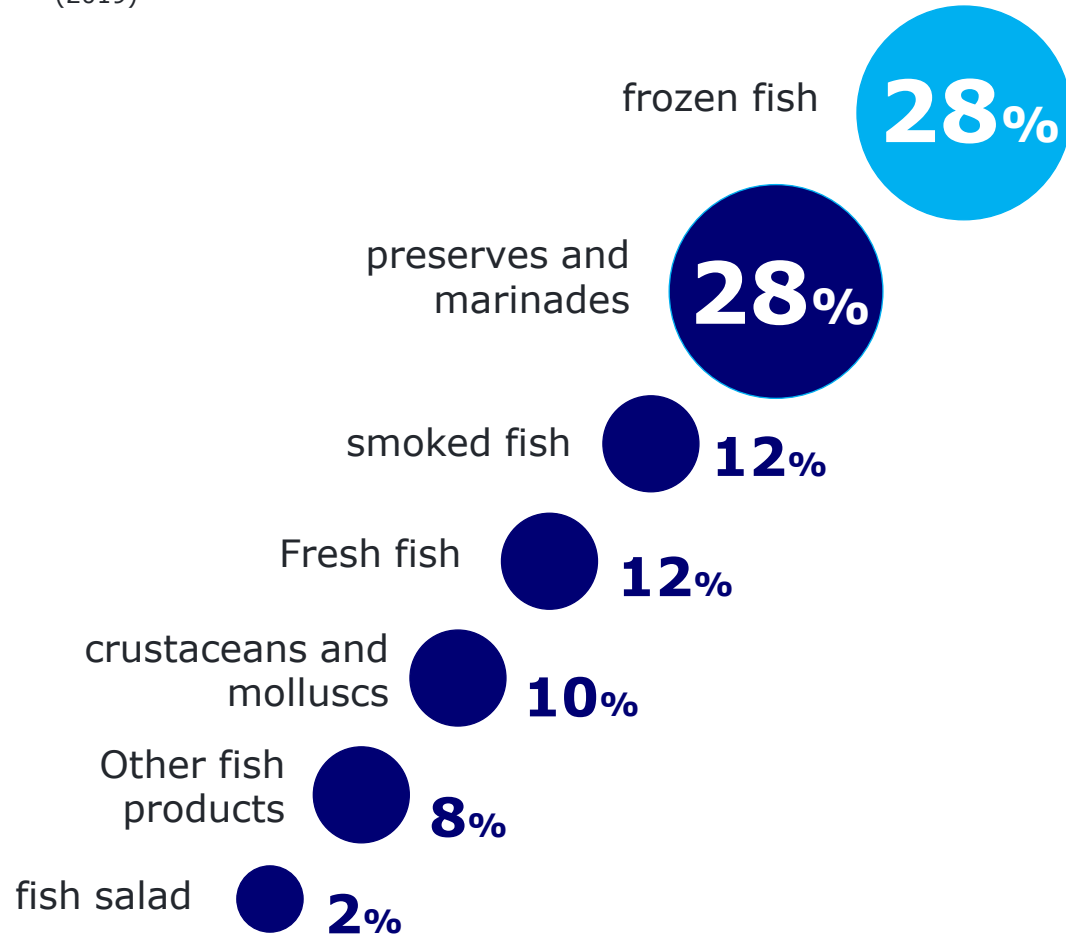
**increase in value over 10 years**  
**+25,6%**

**compound annual growth rate 2010-2020**

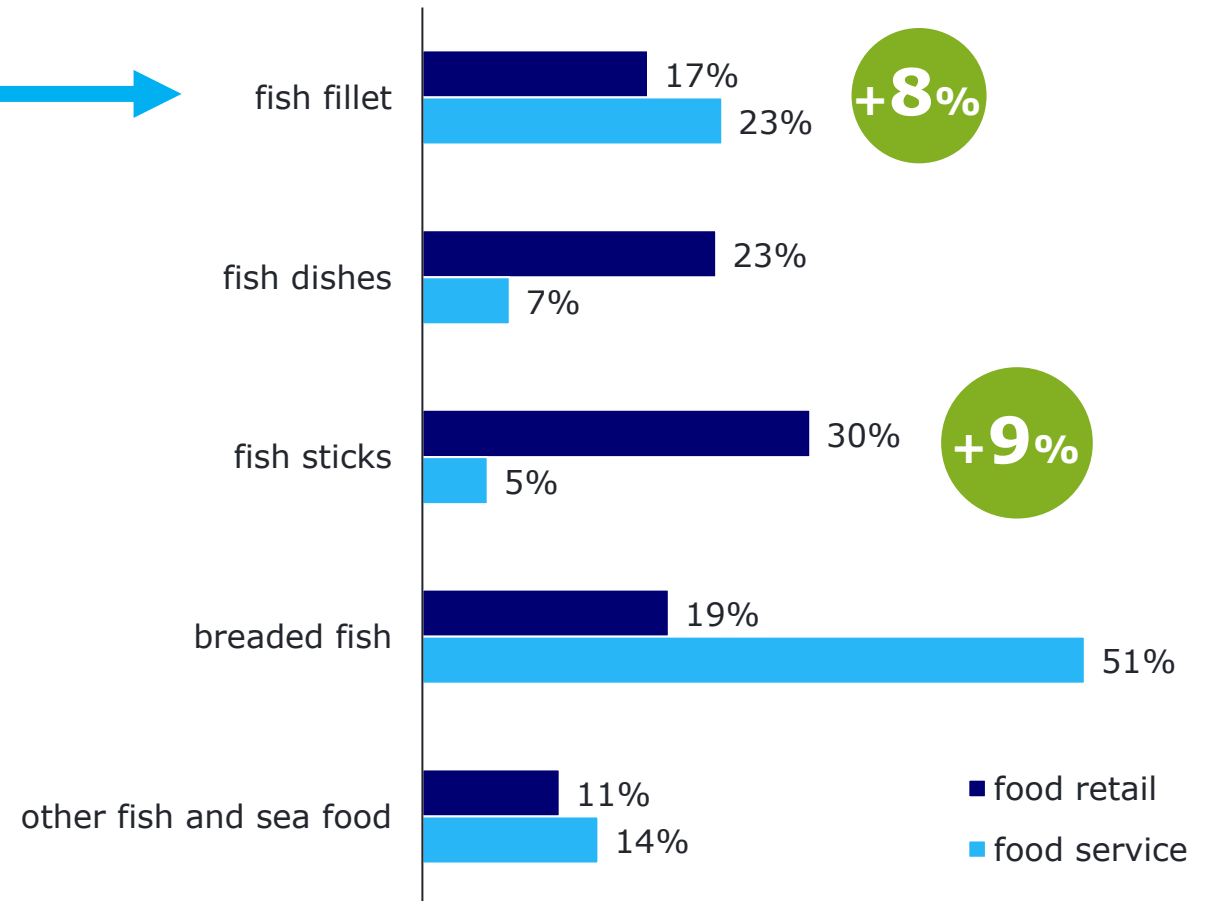
**+2,6% p.a.**  
sales revenue in germany

## Durable forms of fish are popular in GER, frozen fish fillet / fish sticks can grow in 2019

**popular fish products in germany**  
(2019)



**inland sales of frozen fish revenue shares**  
(2019; change to previous year in green bubble)



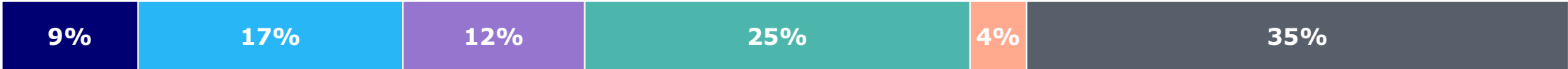


The craft food and discounters are important sales channels for fish and seafood, by far the largest sales channel, however, is the food service sector

## Consumer spending **FOOD RETAIL**



## Total consumer spending **FOOD RETAIL + FOOD SERVICE**

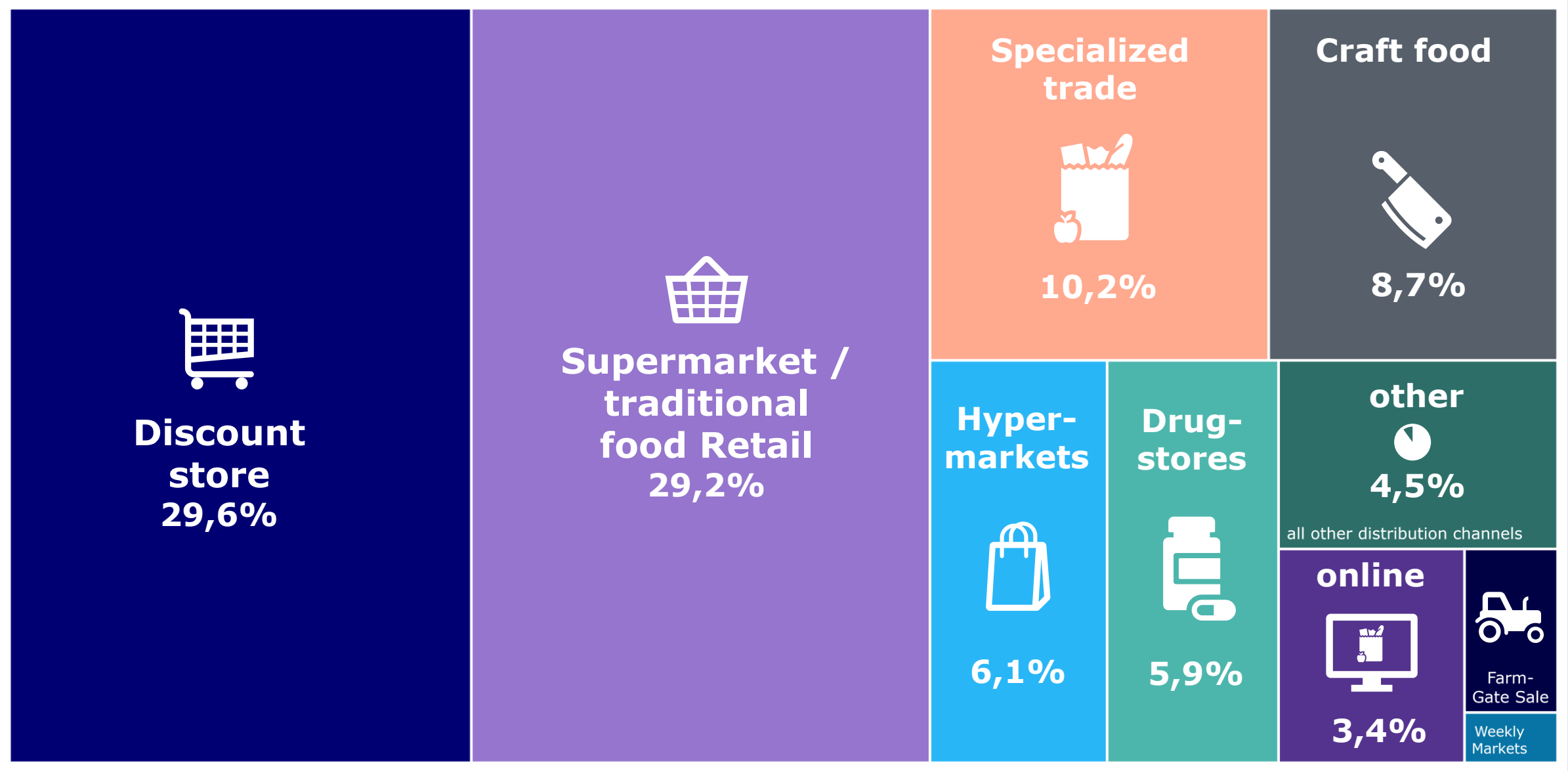


■ Hypermarkets   ■ Discounter   ■ Supermarkets   ■ Craft Food / Specialized Trade   ■ other   ■ Food Service

Source: IFH projections based on AMI, BMEL, GfK, Nielsen, press releases; Fisch-Informationszentrum e.V.; figures below 1% are not shown; \*Food service = out-of-home consumption (restaurants, snack bars, cafés, etc.).



# SALES SHARES OF DISTRIBUTION CHANNELS IN FMCG RETAIL



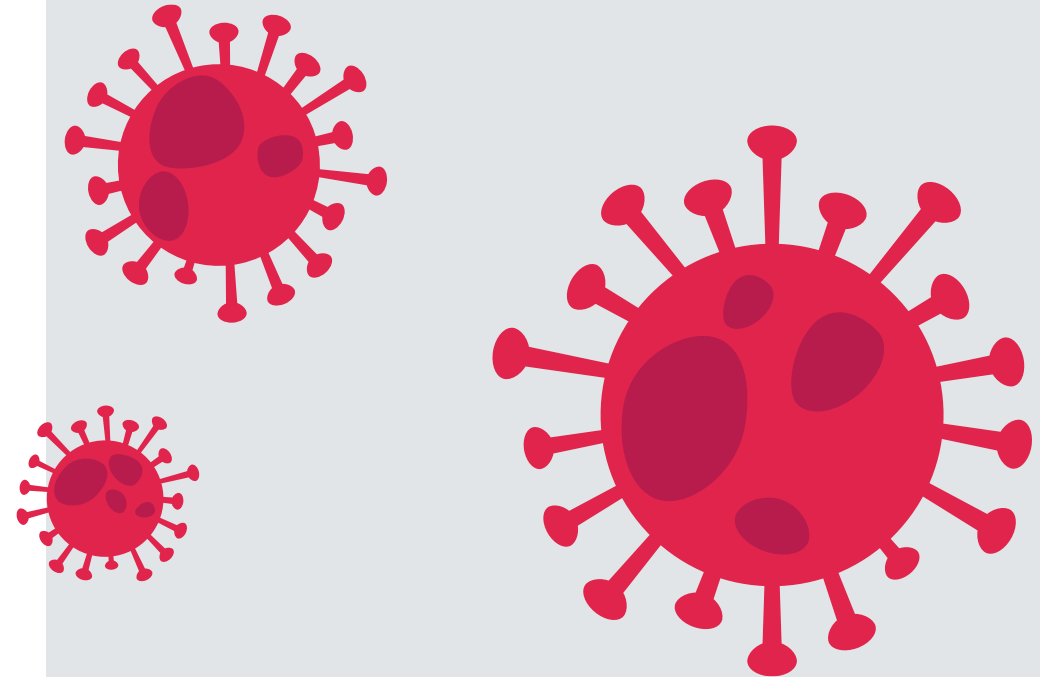


## Net sales (in millions of euros) of the companies with the highest sales in food service sector in Germany in 2019

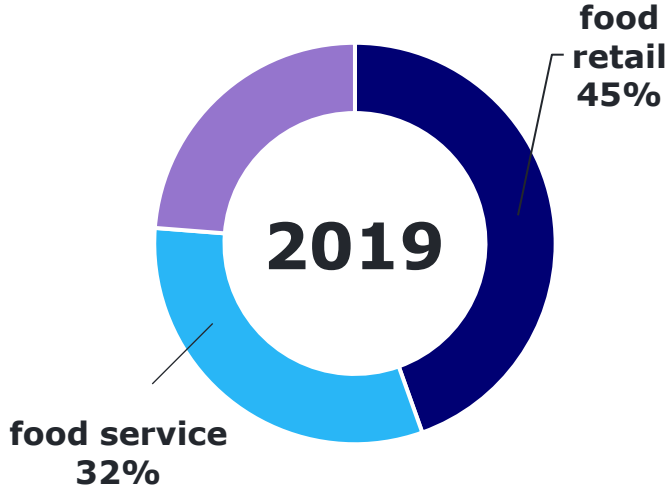
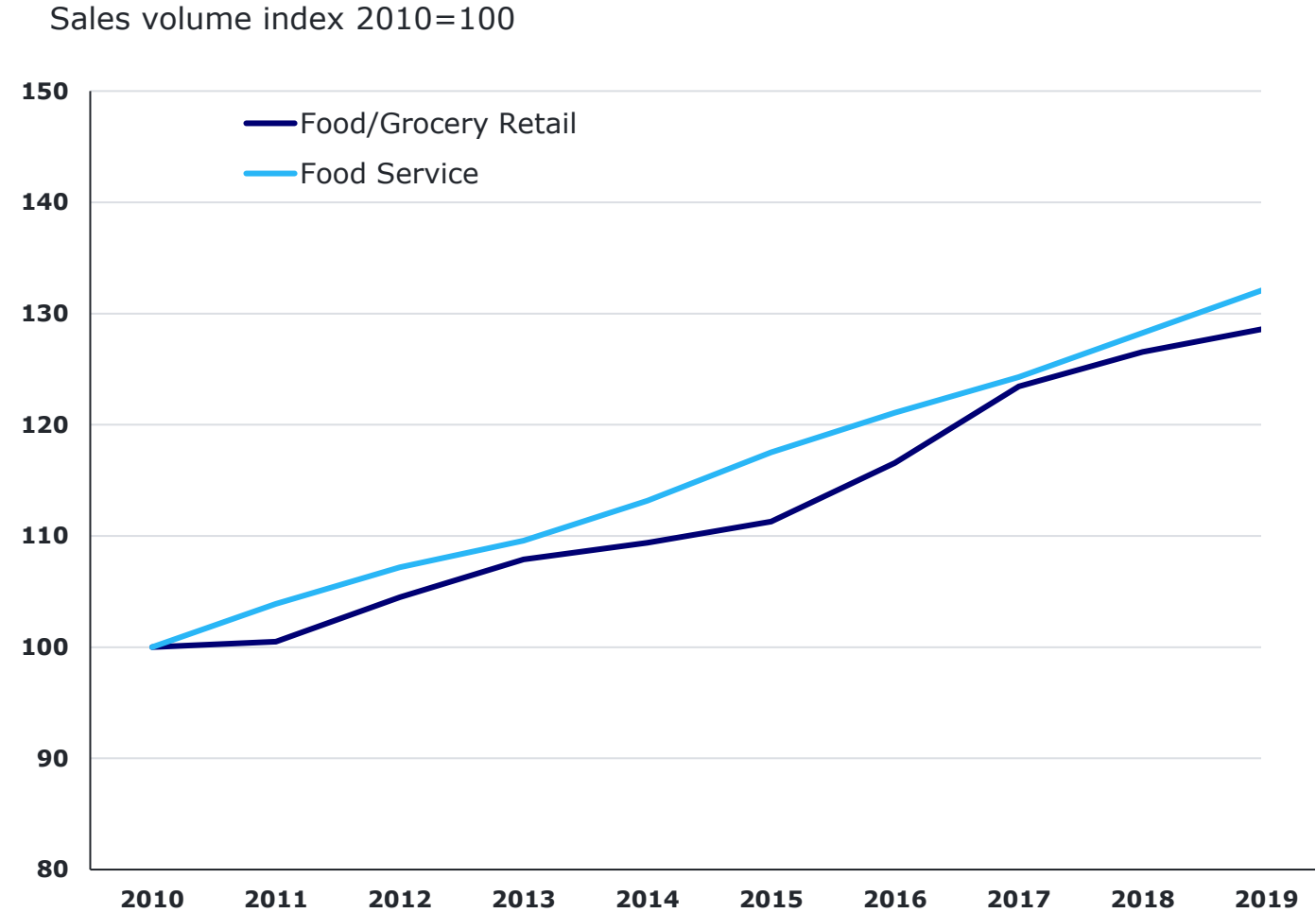


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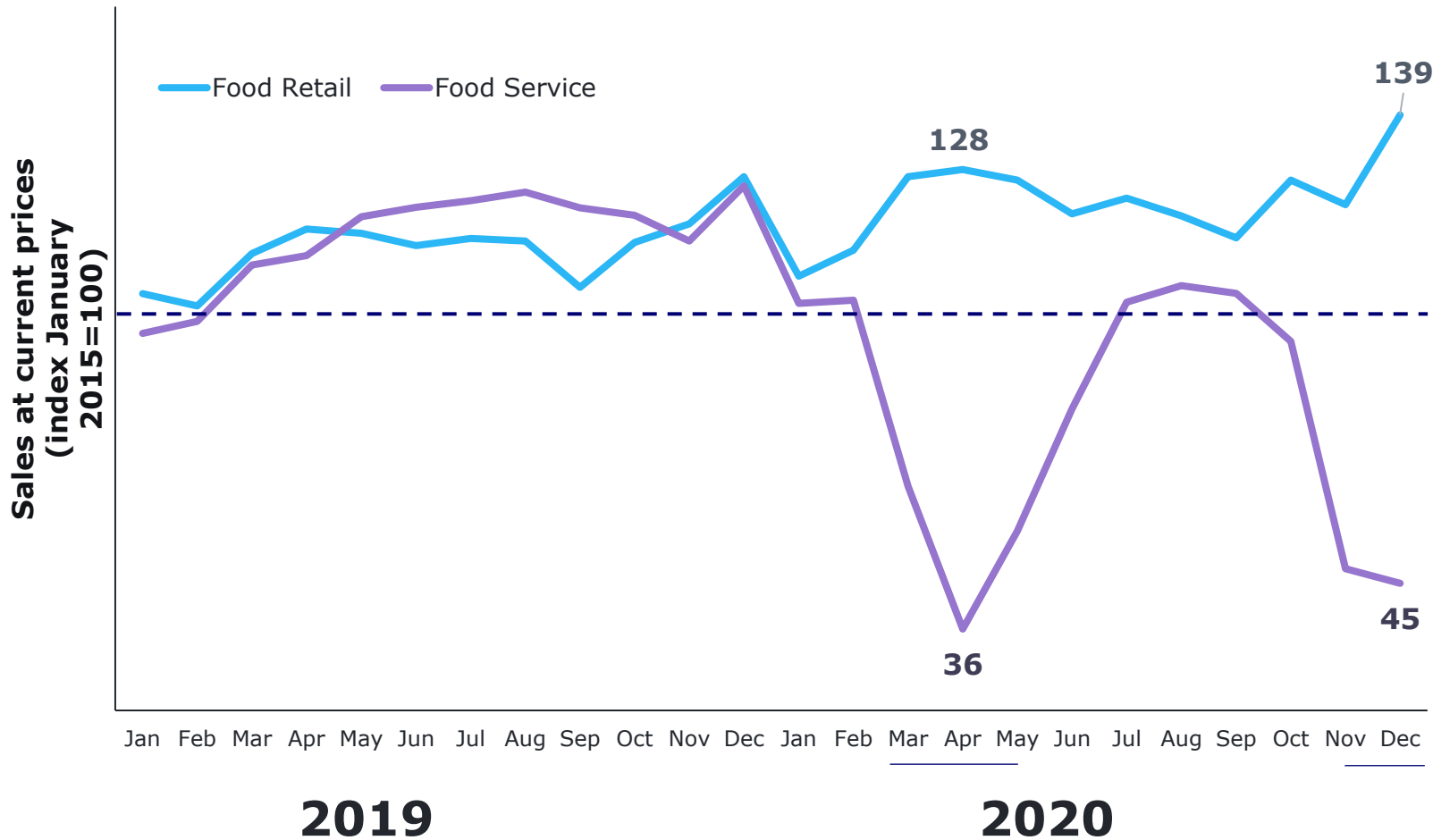
**THE IMPACT OF  
COVID-19**



## Sales development of food in retail and food service, 2010-2020, based on end-consumer prices

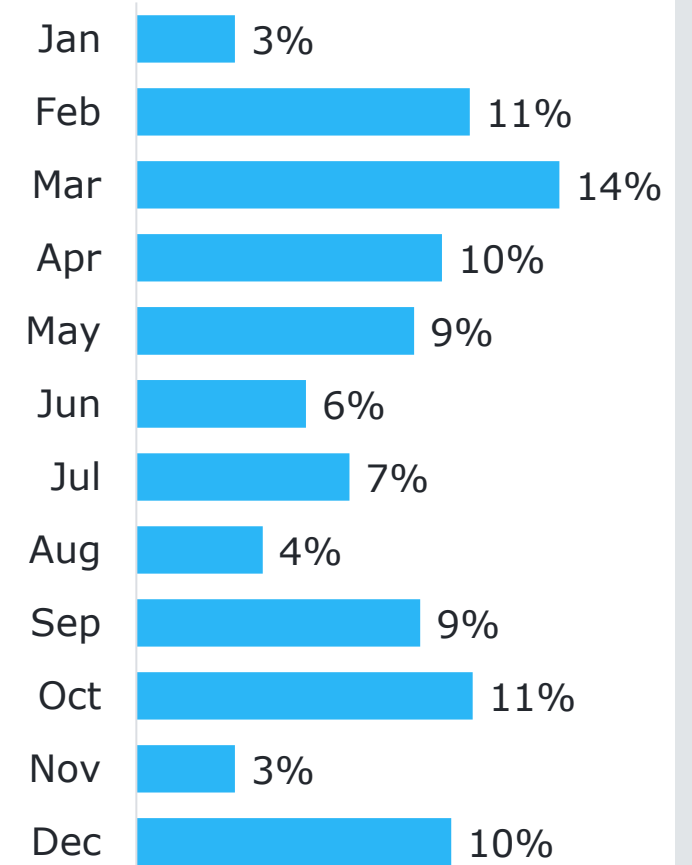


Sales index retail formats/categories over time, 2019-2020 (Germany)

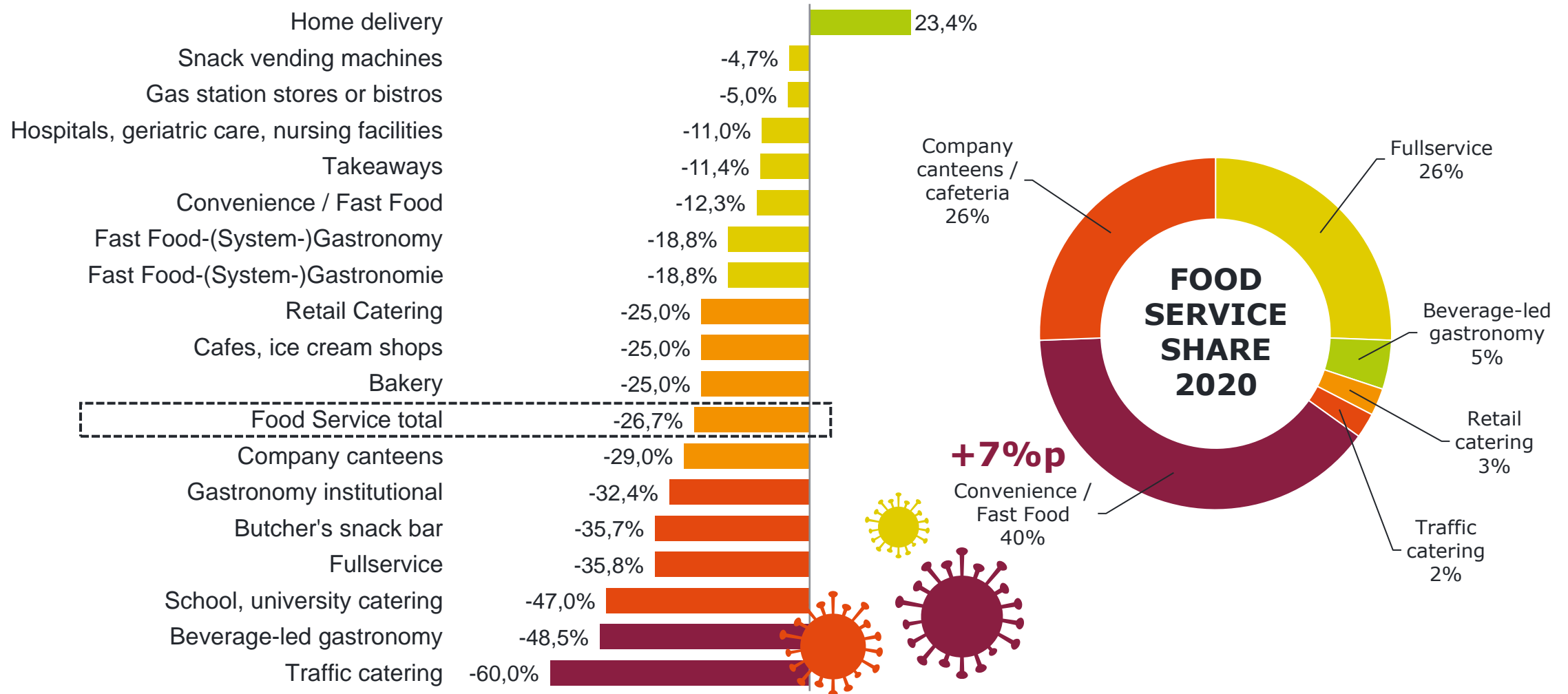


Change in sales compared with prior-year period

**FOOD RETAIL 2020**



## Large variety of differences in distribution channels in the first year of the pandemic



Because of the central role of grocery purchases, the growth of online grocery purchases in the overall retail continues to fuel the "online shift" in other industries.

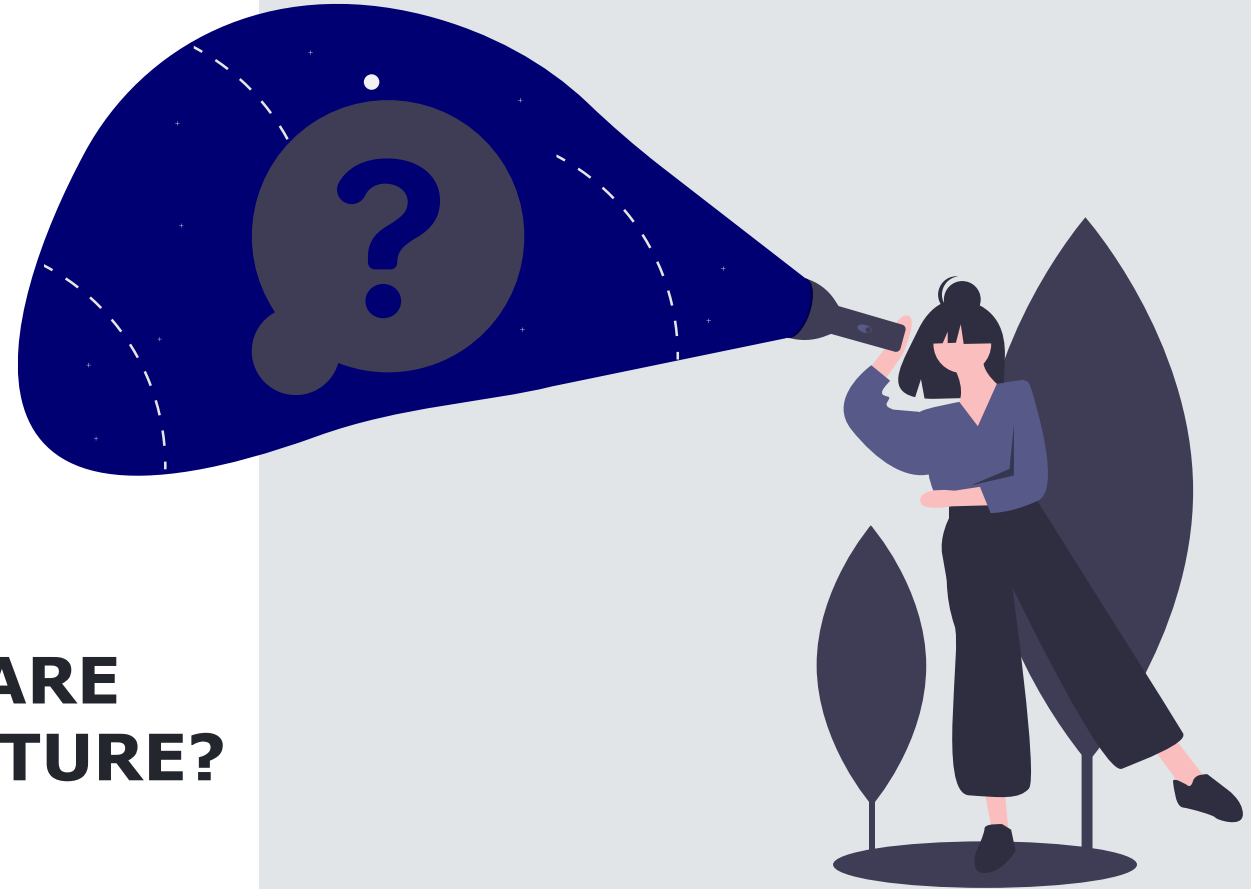


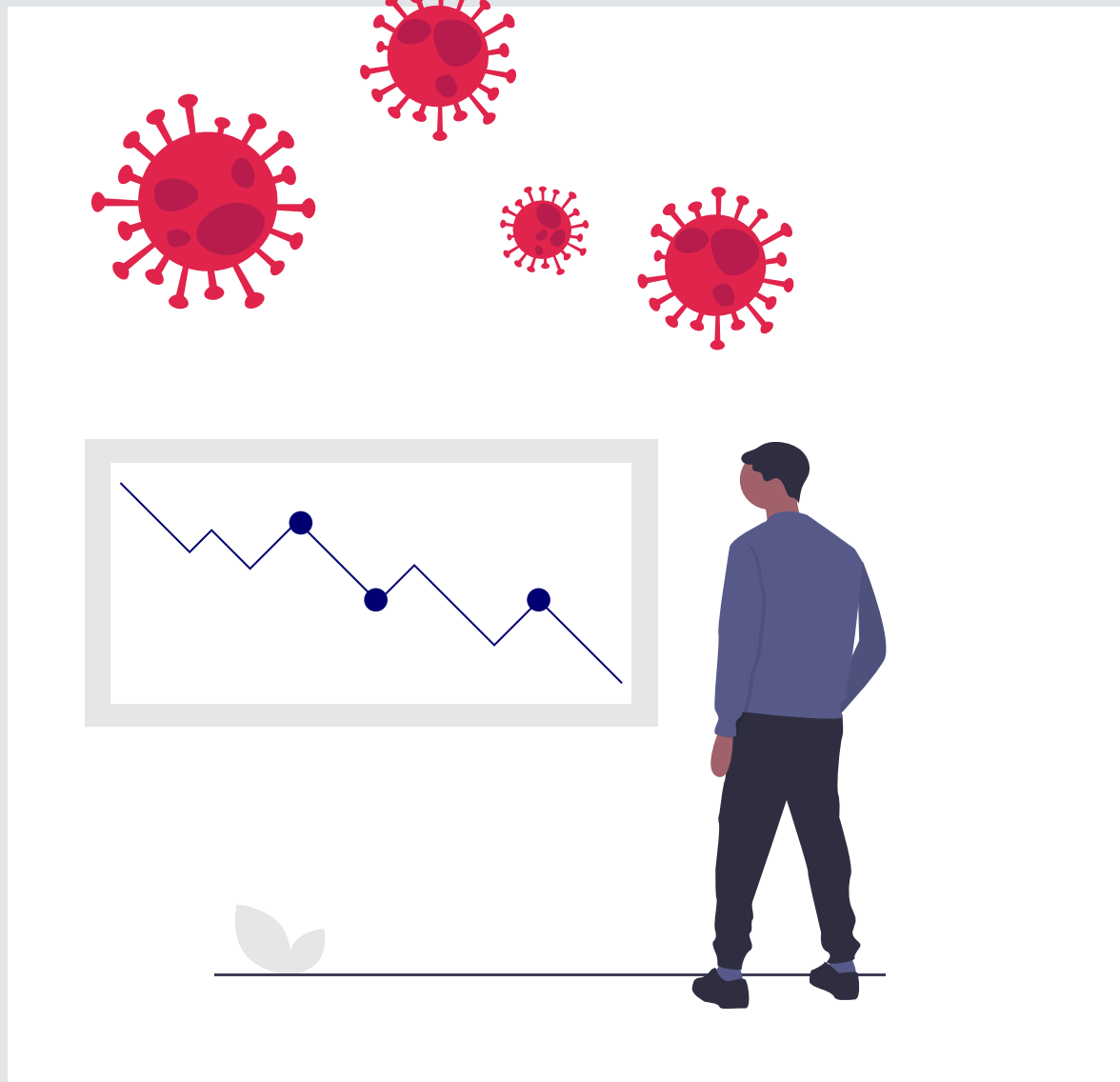


3

**POST COVID-19**

**WHICH TRENDS ARE  
SHAPING THE FUTURE?**





**Convenience**



**Sustainability**



**Health**



**Organic food**

IRISCHE WEIDEHALTUNG

PRODUKTE ▾

REZEPTE ▾



NACHHALTIGKEIT

KARRIERE

UNTERNEHMEN



Compound annual growth rate 2013-2019

+12,7% p.a. sales revenue in germany



WEIDEHALTUNG WEITER GEDACHT

UNSERE FARMEN

UNSERE WEIDEHALTUNG

UNSER ANSPRUCH

# THANK YOU FOR THE ATTENTION



## **Max-Henrik Fabian**

Consultant – Market Insights

+49 (0) 221 943607-38

m.fabian@ifhkoeln.de


**IFH KÖLN**  
Erfolgreich im Handeln

## **IFH Köln GmbH**

Dürener Str. 401 b  
50858 Köln

+49 (0) 221 943607-10

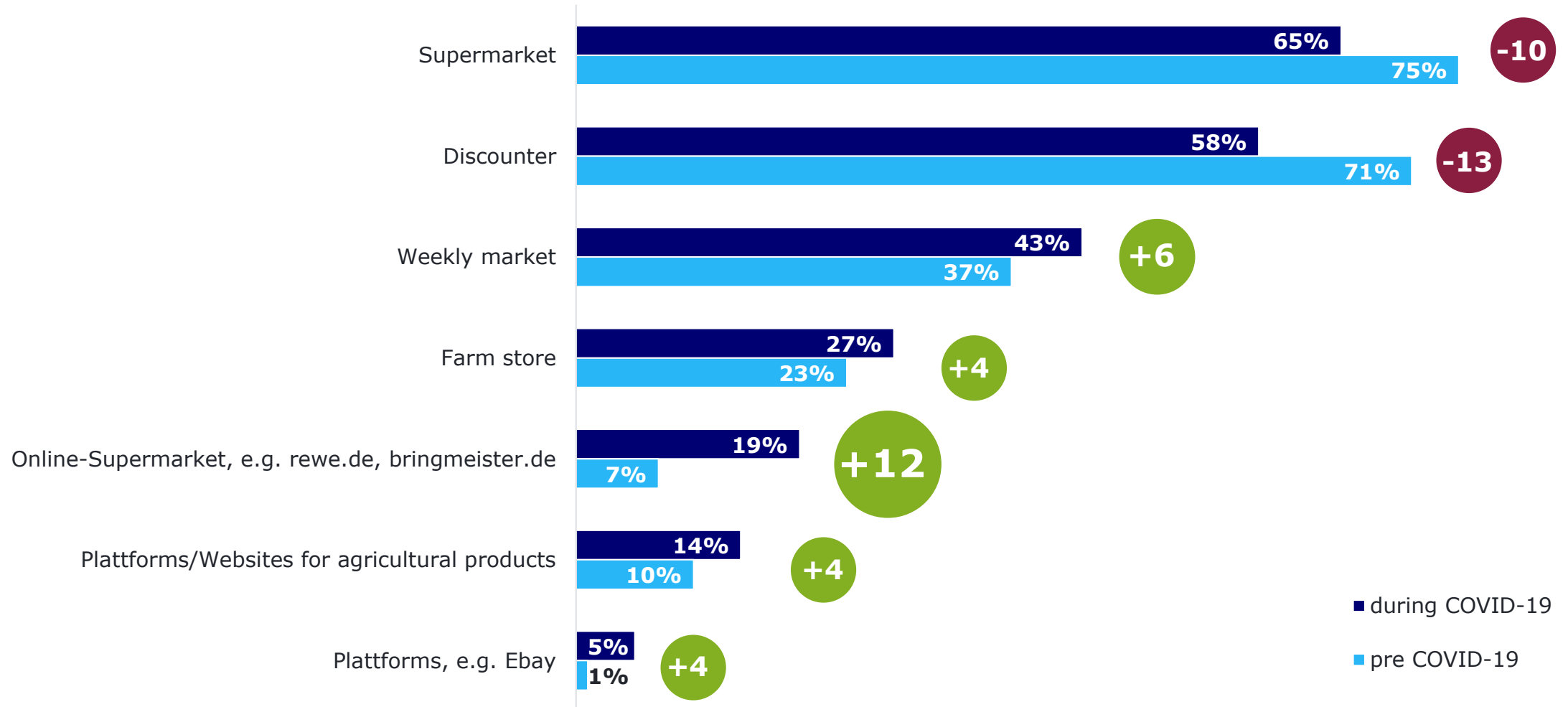
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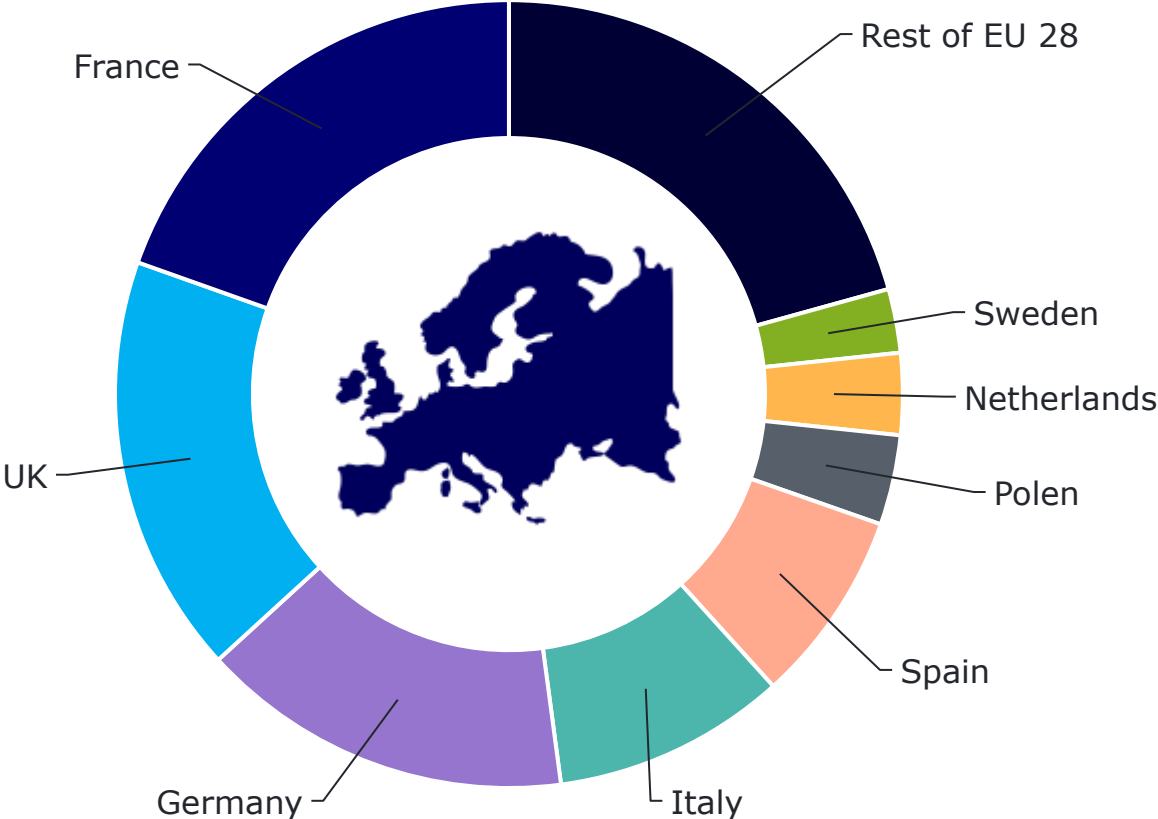
**FURTHER SLIDES**

## Consumers' preferred shopping locations of - before and since COVID-19 in comparison

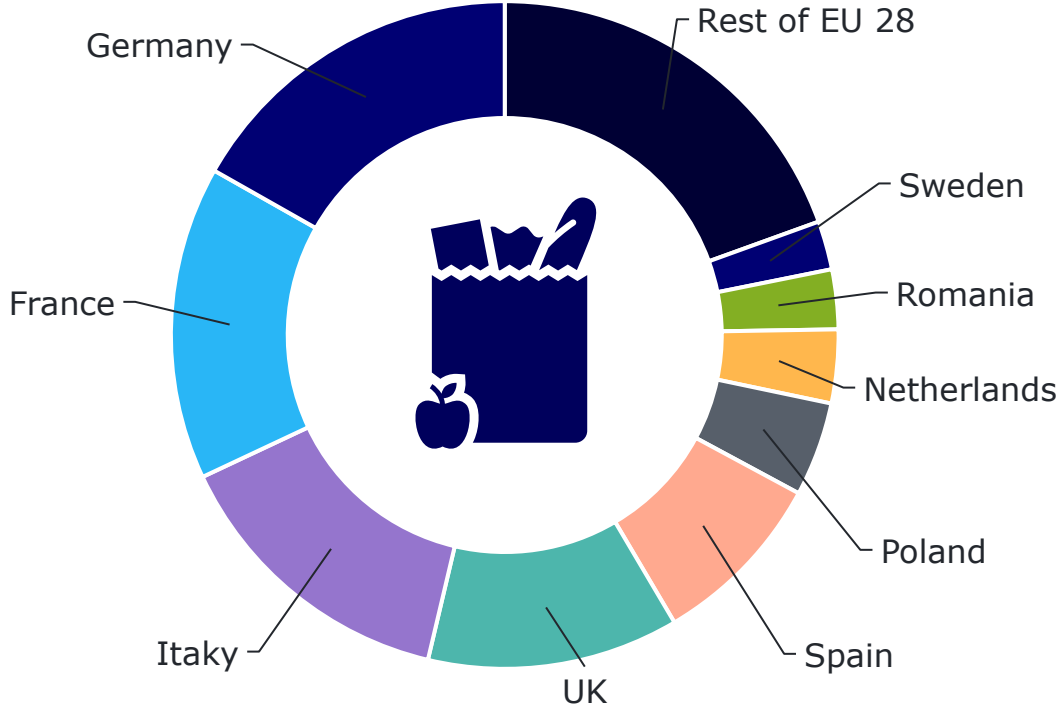


**While consumer spendings in food retail in Germany belongs to the TOP 3 countries. Germany is the largest market for food in the European Union**

Consumer spendings in food retail channels

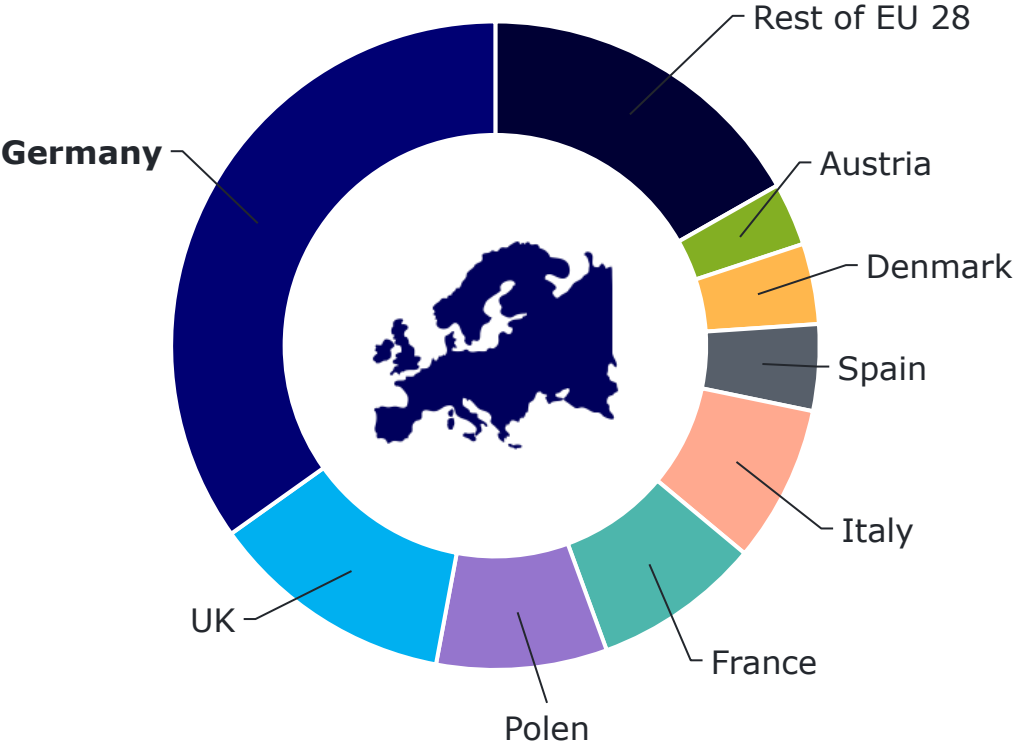


Consumer spendings food, beverages, tobacco



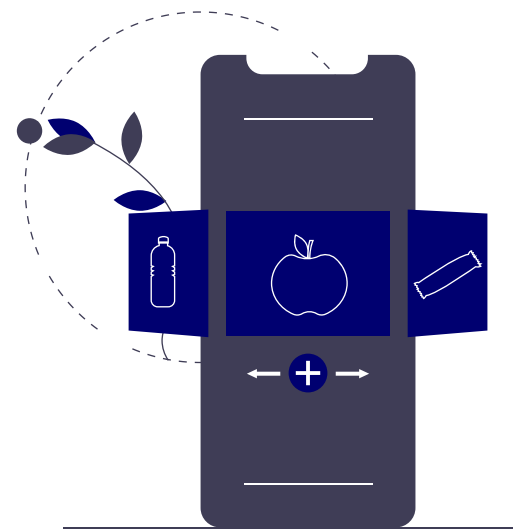
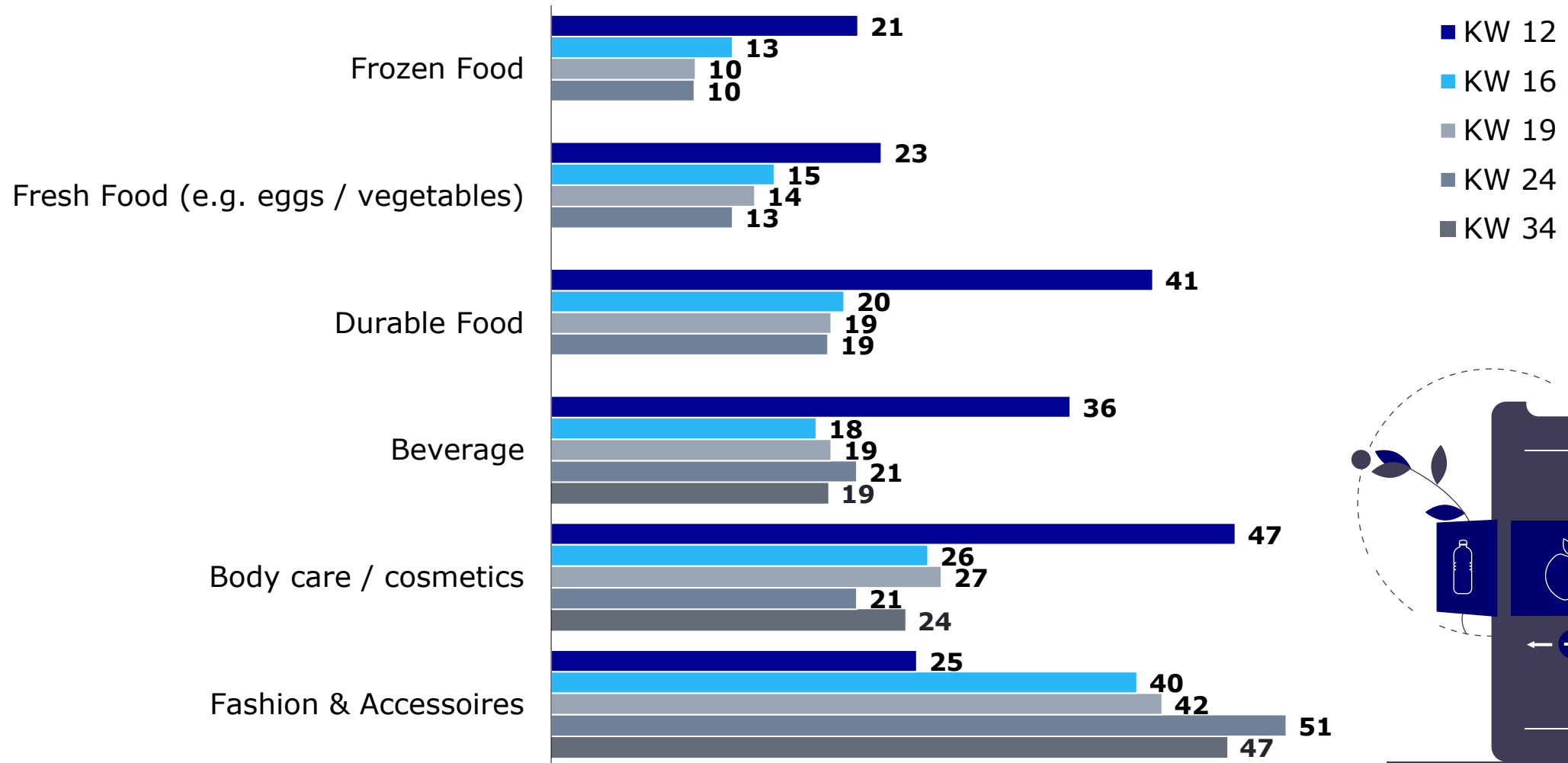
Discounters occupy a very high position in distribution to the consumer

Consumer Spendings discount stores

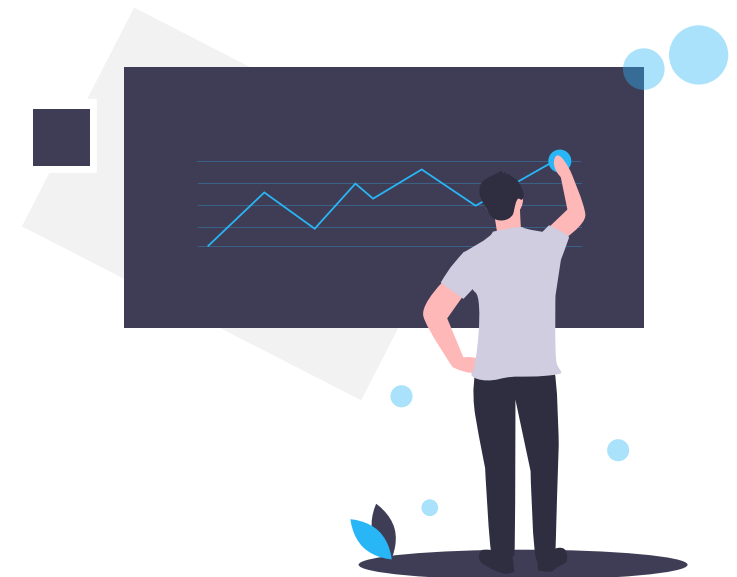




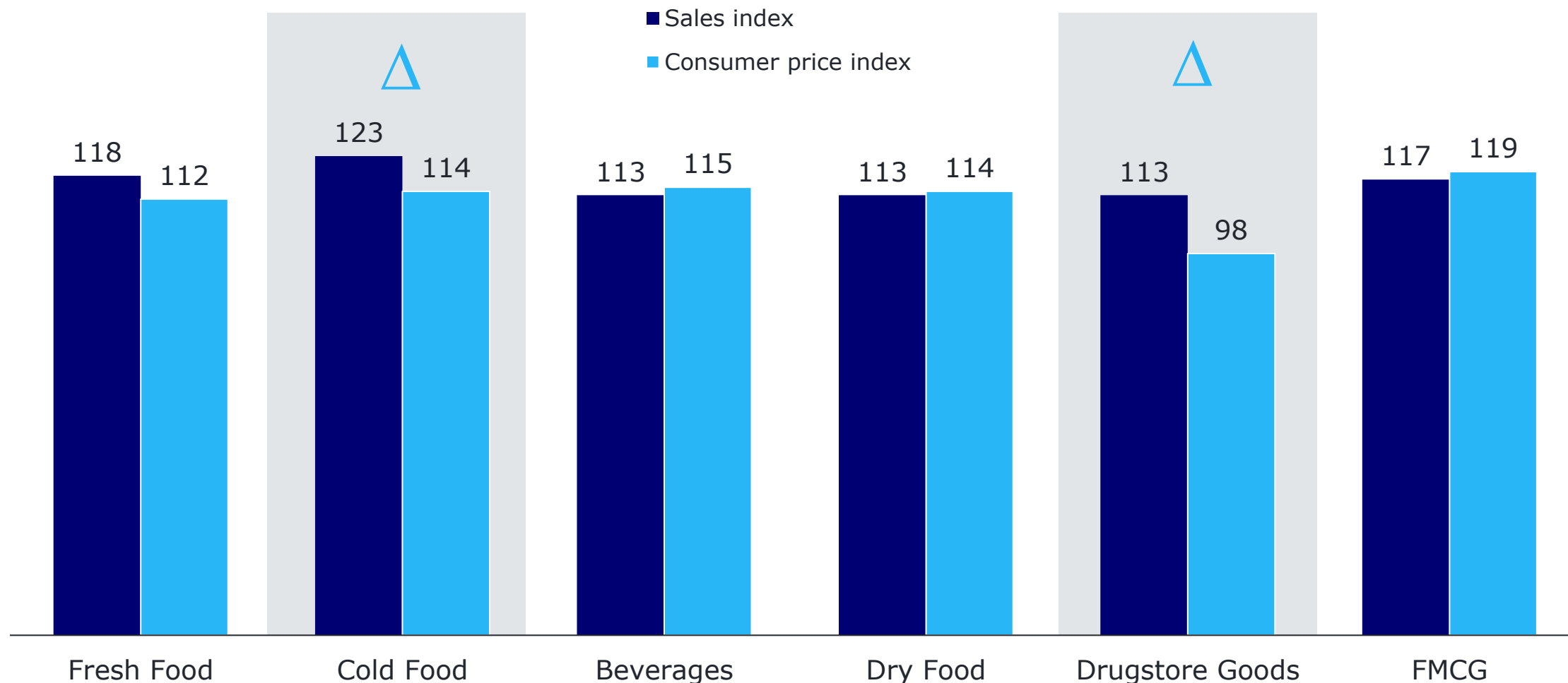
Non-Food-Products have the higher "shift" to online, Food and FMCG with special role



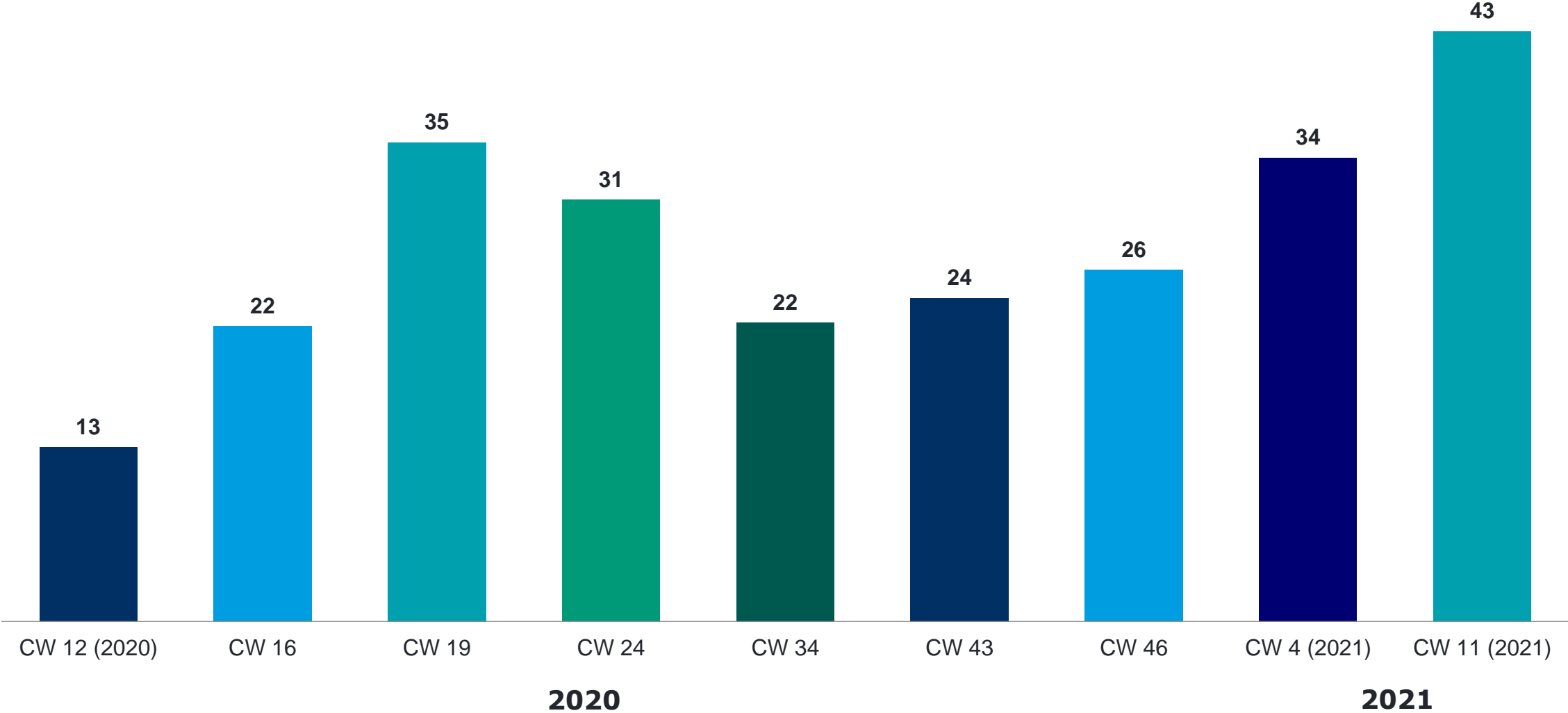
## Sales performance of distribution channels in FMCG retail 2020 vs. 2019



The sales growth was attributable to price increases. Volume increases in cold goods and drugstore products.



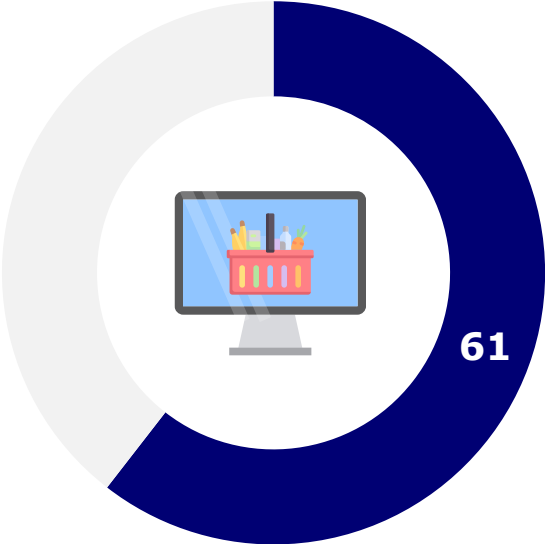
Did you make purchases online last week that you normally do in the store?



Source: IFH KÖLN <https://corona.ifhkoeln.de/>; CW 12: n = 1.000, CW 16: n = 495, CW 19: n = 496, CW 24: n = 500, CW 34: n = 597, Figures in percent

COVID-19 as a growth driver for grocery online shopping

"Weekly shopping" also online due to framework conditions caused by corona pandemic



QUESTION Which of the following statements most closely applies to you?

INFO Online grocery shoppers: n = 147; data in %; deviations in percentage points