

Food Retail in Europe / Germany



1 Nutrition becomes more political



Strategy to reduce sugar, fat and salt



Quelle: BMEL/Janine Schmitz/photothek.net

Strategy to reduce sugar, fat and salt



Improve Animal Welfare

International Animal Welfare Conference in Brussels



Denmark, the Netherlands, Sweden and Germany presented their European Animal Welfare Initiative at the International Animal Welfare Conference and discussed the envisaged goals.

▶ [more](#)

Improving the welfare of laying hens



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The BMEL lobbies for more animal welfare at national and EU levels, Source: photoGraphie / Fotolia.com

Improving animal welfare in Germany

Improve Animal Welfare



Number of animals
in Germany:

26,9 Mio of pigs



502 Mio of poultry



Reduce food waste

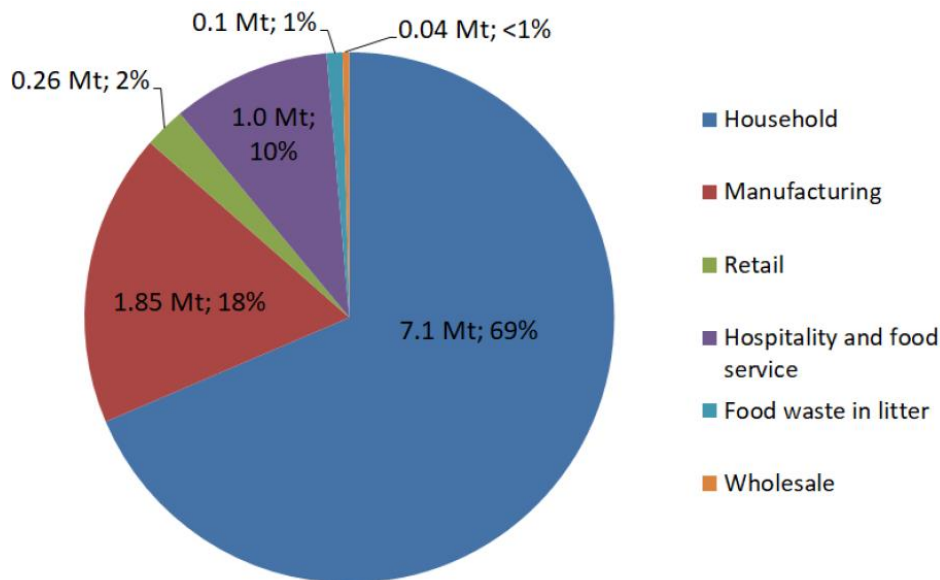


A conference poster for "Conference on Food Waste Prevention and Management". It features the logos of Interreg CENTRAL EUROPE and STREFOWA. The text includes "reducefoodwaste.eu", "Best at 26/4/19", and "University of Natural Resources and Life Sciences Vienna". A blue speech bubble says "Fully booked!!". To the right, there is a list of topics: "appreciati", "inspiration", "sustaini", "f", "respo", "educator", "rese:", "coc", "d".

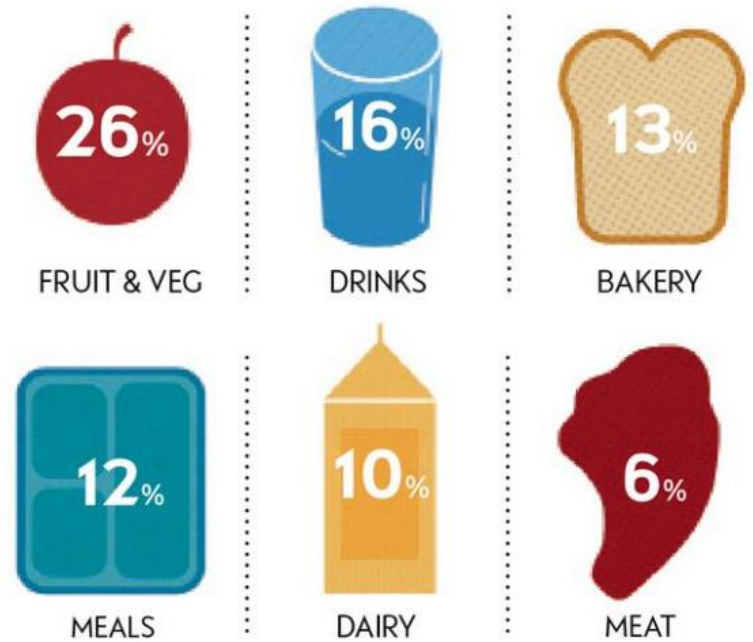


Reduce food waste

Amounts of food wasted in the UK by sector
(total post-farm-gate = 10 Mt)



Which types of food are wasted the most?



Source WRAP

2 Convenience-food, out-of-home consumption and sustainable products become more important

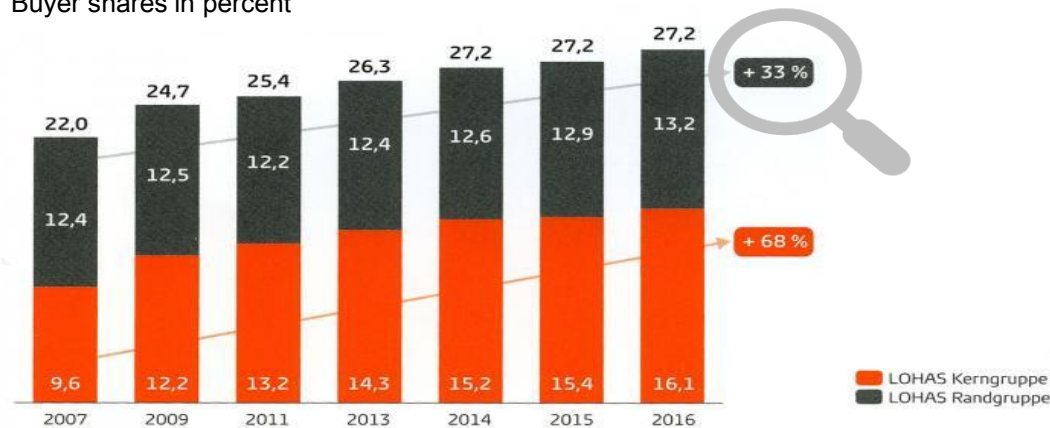


Growing diversification of lifestyles



LOHAS (Lifestyle of Health and Sustainability): Growing target group

Buyer shares in percent



* Lifestyle of Health and Sustainability

© GfK | Quelle: bis 2008 20.000er, ab 2009 30.000er GfK ConsumerScan, ab 2012 30.000er (CP+)

Trading up



Supermarkets offer more high class and premium products

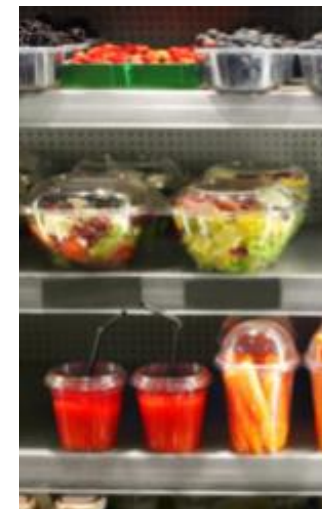
Convenience Food



Convenience-food is one of the most dynamic sectors in food-trade

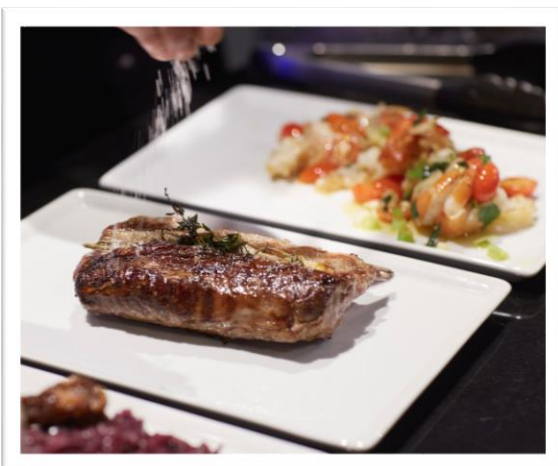


Take-away concepts



Grocerants (In-store dining)

- many supermarkets offer more space for in-store dining
- good potential for breakfast and lunch



Sustainable products

- increasing demand for regional or locally sourced products



Sustainable products

- increasing variety of organic products





Fairtrade

FAIRTRADE Germany

Development of Turnover (in million EURO)



FAIRTRADE
DEUTSCHLAND



Source: TransFair e.V. • Get the data • Created with Datawrapper

3 Digitalisation is changing food trade



Food retail in Germany

- The German food retail market is highly concentrated with high market saturation
- There is a high share of discounter which results in a very strong competition and small margins

Discounter (Market share about 46%)

< 1200 qm



Supermarkets (Market share about 42%)

1200 – 5000 qm



Hypermarkets (Market share about 12%)

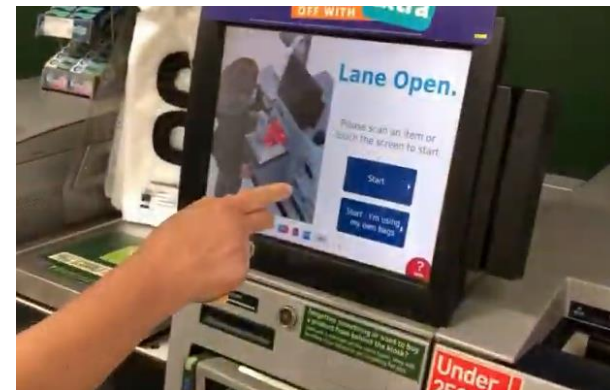
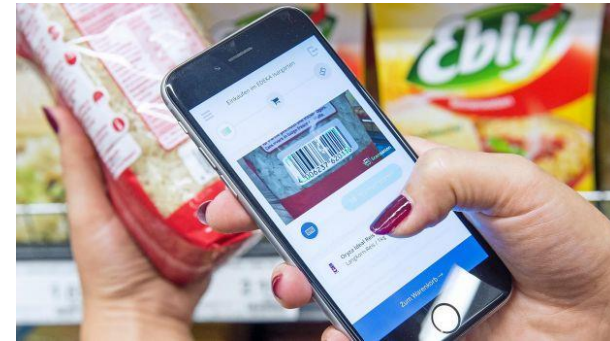
> 5000 qm



Digital Transformation



- WiFi: free access in the stores
=> infrastructure for many customers
- Mobile: in touch with customers (eg. Loyalty Apps)
=> communication channel
- Self-Scanning
=> fast payment
- Omnichannel
=> diversification of distribution channels
- ESL: Electronic Shelf Label
=> time-saving for retailers and accurate



Online Food Retailing

- not stationary versus online, it is **emotional vs. non-emotional**
- online food retailing segment keeps growing (still at a low level)
- focusing on metropolitan areas / large cities

