

Greek-German Food Forum



„Analyse des deutschen Lebensmitteleinzelhandels“
«Ανάλυση του γερμανικού λιανικού εμπορίου τροφίμων
και ποτών »

08 Oktober 2026



Deutsch-Griechische
Industrie- und Handelskammer
Ελληνογερμανικό Εμπορικό
και Βιομηχανικό Επιμελητήριο



GRIECHISCHE BOTSCHAFT BERLIN
WIRTSCHAFTS- UND HANDELSABTEILUNG

Υπό την αιγίδα | Unter der Schirmherrschaft



Η γερμανική αγορά τροφίμων και ποτών χωρίζεται σε τρεις βασικές ενότητες

- Λιανεμπόριο μάρκας που με τη σειρά του χωρίζεται στο Σ/Μ και τις ειδικές αγορές σε κάθε κλάδο
- Λιανεμπόριο ιδιωτικών ετικετών που αφορά το σύνολο των DISCOUNTERS και ένα μέρος στις αλυσίδες Σ/Μ
- HORECA όπου το προϊόν διατίθεται με πολλές μορφές και για εμάς μπορεί να διαιρεθεί σε ελληνικό HORECA και γερμανικό HORECA



Country Report: Germany Retail Analyse

08 Oktober 2026

Country Report: Germany

- Top Players in the Country
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Top Players in the Country

#1 Edeka



Company Description

Edeka is the market leading grocer in Germany. The Hamburg-based retailer co-operative consists of seven regional wholesale divisions that manage the retailer's most important supermarket business, which is dominated by approximately 3,800 independent shopkeepers. Separately, a central unit runs the group's soft discount operations under the Netto Marken-Discount banner. The fact that it is only present in Germany allows the co-operative to focus on and invest in what it does best, selling groceries in Europe's largest economy. Its closest competitor is Rewe Group.



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11.028
Number of Stores
in Germany in 2024

27.90 %
Market Share
in Germany in 2024

EUR 67.035 mn
Retail Sales
in Germany in 2024

Company Agenda

Strengthening core aims - Edeka, as Germany's largest grocer, has set itself four main strategic assignments. Firstly, strengthening the independent retail division (Selbstständiger Einzelhandel, SEH). Secondly, investing in verticalisation and improved efficiency. Thirdly, establishing and developing a range policy for private labels that focuses on sustainability and resource management. Lastly, establishing and developing the retail brand Edeka as an event- and experience-orientated brand to make the shopper experience more pleasurable and indulgent.

Independent retail - To help the co-operative retailer succeed in a saturated market, Edeka is attempting to turn supermarkets into market places where people meet and dwell; making food shopping more emotional in a market that historically has been in the grip of no-frills discount players; providing personal product information; as well as offering food-to-go and convenience options. This involves substantial investment in the network, for example in 2016 Edeka invested over EUR200mn in the modernisation of its network and opening of new stores, plus improved logistics.

Innovating E-Commerce - Under Edeka's lead, former Tengelmann banner Bringmeister has evolved into one of the most innovative German grocery e-commerce operations, operating head-to-head with Amazon Fresh. The retailer is investing heavily in a sophisticated service offering which includes one hour delivery slots, on the same day and straight into shoppers' fridges. Edeka will surely continue to develop the format to minimise the gap with arch rival Rewe Group which is currently the grocery e-commerce market leader in Germany. The retailer's seven regional divisions also launched an e-commerce order platform called Olivia to provide independent shopkeepers with consistent technological solutions.

Verticalisation - Edeka is driving vertical integration across a number of product categories and in various ways. Edeka sees verticalisation as a viable way to decrease its dependence on a few suppliers in consolidated product markets, especially where commodity prices are increasingly volatile. This comes at a time when private label is becoming ever more important - not only in the discount, but also full-range divisions, where continued product innovation is key.

Completion of IT modernisation project - Edeka is now rolling out the last elements of the group-wide IT modernisation project called Lunar. These last tasks include updating the supermarket IT at store level and the supply chain management system, including transportation management. A consistent IT solution is extremely important and a substantial achievement for a retail group as complex as co-operative Edeka, which allegedly needs to manage more than one million different products on a national, regional wholesale and local retail level.

#2 Schwarz Group



Company Description

Schwarz Group has grown to become Europe's leading grocer thanks to relentless expansion - with unparalleled investment and constant work on concept improvements resulting in higher sales densities. The success of the Germany-based company, which is privately owned and restrictive in its sharing of information, rests on two banners: Kaufland hypermarkets/superstores and Lidl discount stores. It operates in 29 countries, which marks a record number among European grocers. Lidl entered the US in 2017 and Serbia in October 2018, while Australia, Moldova (and Serbia?) are on Kaufland's agenda.



© Schwarz Group

#2 Schwarz Group



4.017
Number of Stores
in Germany in 2024

21.50 %
Market Share
in Germany in 2024

EUR 51.650 mn
Retail Sales
in Germany in 2024

Country Agenda

In its home market, Schwarz Group runs Lidl discount stores and Kaufland discounting big box outlets. It has steadily extended its position in the market, turning what once was a small follower into a serious threat for all leading players, not least discount inventor Aldi Nord/Süd.

Expansion has been stagnating at Lidl as it has been consolidating its store base in favour of larger, more up-to-date locations that focus on freshness and convenience. Kaufland, meanwhile, is trying hard to find new ways to grow in smaller city locations, with more appealing store designs, without losing its price leadership reputation.

Lidl is working on both ends: Defending a price leading position with a broad array of private labels at aggressive prices, while extending its quality-led approach with themed promotions, range innovations (instore bakeries, fresh foods), and massive advertising spending.

Lidl's efforts underline its willingness to establish a new channel of its own kind positioned above the discount sector. This is reflected in its advertising strategy. Besides category efforts, these include e-commerce trials, selling ambient and drugstore goods online.

Kaufland looks to extend its leading position with aggressive price offers, while at the same time strengthening ethical credentials; this includes not only sustainability efforts but also an improved focus on regionality, with the management now being given more room for local manoeuvre. A new store concept has been rolled out but it has not yet brought the expected push in sales.

#3 Rewe Group



Company Description

Rewe Group is one of the largest German retailers and the second-largest co-operative, consisting of both company operated as well as independently run stores, which are mainly focused on grocery. It has an international arm spearheaded by the Austria-based Billa supermarket banner and the multinational Penny discount banner. Its portfolio is most diverse in Germany, where it also has big box as well as DIY stores - and an important tourism and travel pillar (not covered by LZ). The group is increasingly investing in online operations, mostly in grocery.



© LZ Retailytics

#3 Rewe Group



7,305
Number of Stores
in Germany in 2024

18.00 %
Market Share
in Germany in 2024

EUR 43.130 mn
Retail Sales
in Germany in 2018

Country Agenda

Strengthening its core supermarket business is a top priority and key to Rewe's success. With the new Rewe 2020 concept, the retailer is working hard on improving its main pillar, both the company-owned network and the stores run by independent shopkeepers, with a focus on freshness and regionality. This goes along with the recent integration of ca. 60 former Kaiser's Tengelmann supermarkets in Berlin.

Also under its new CEO Lionel Souque (since July 2017), Rewe Group will be looking to secure future growth opportunities mainly via organic expansion as the retailer is under close scrutiny from the cartel authorities due to its market power. It has ventured into new niches, which include the convenience store (>500 Rewe To Go stores in early 2019), but less so restaurant business.

Another way to grow is through collaboration. It has tightened its ties with Wasgau and Coop Germany to control the latter's operational business, as it continues and intensifies its everyday business with its partner Dohle.

Following the turnaround of Penny (Discount National) in Germany in 2015, which was originally planned for 2016/2017, the retailer cannot not remain idle on its 'supermarketisation' course. The focus is on emotionalisation, individualisation and convenience.

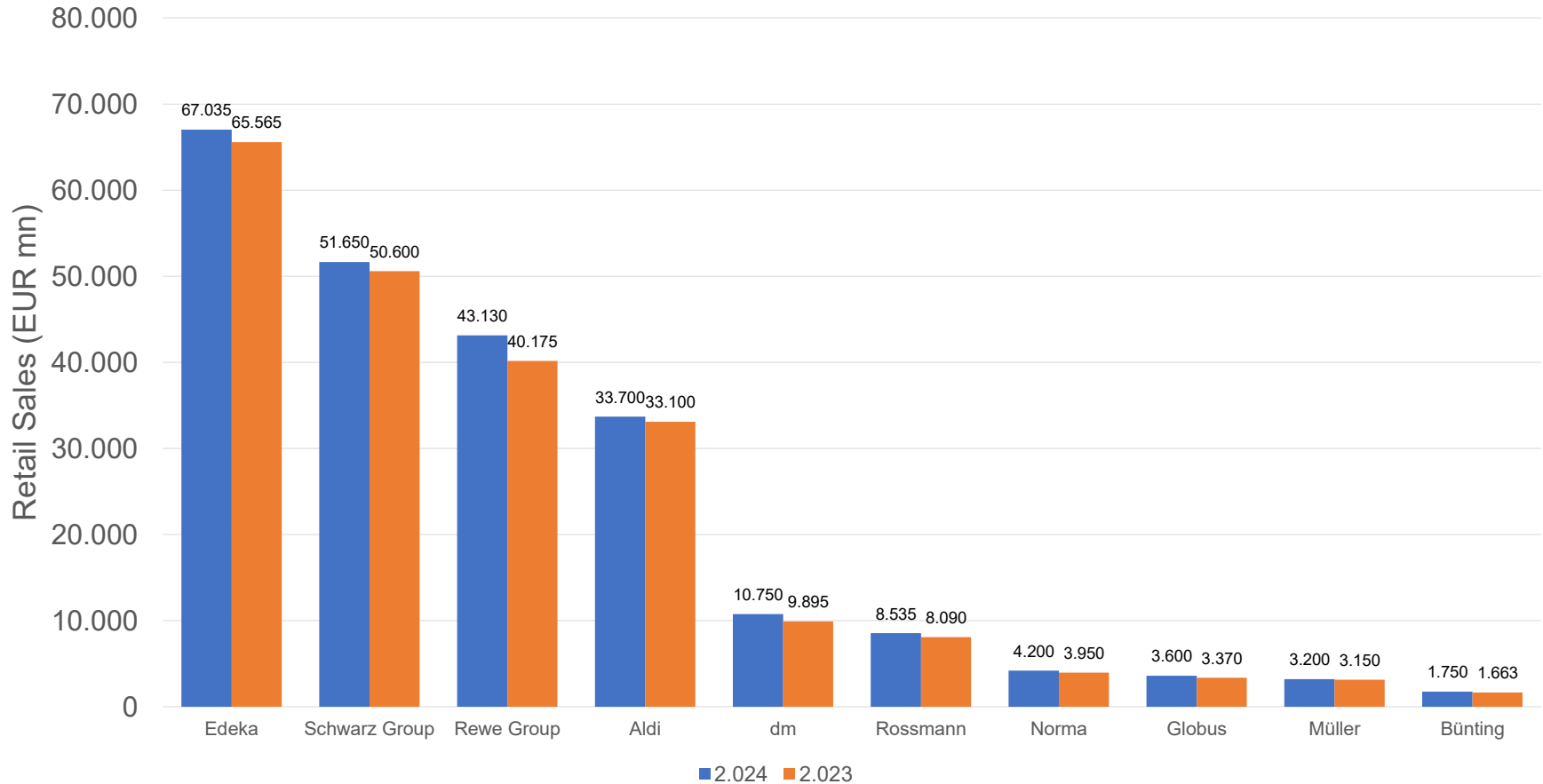
The retailer is investing heavily in the Rewe Digital division in order not to miss the e-commerce opportunity even if there is no immediate return. All e-commerce activity is to support but not cannibalise its store-based business - and to fight off threats from Amazon Fresh & co.

Charts and Tables Based on Retailer Data

Retailer Charts and Tables



Top Retailers Germany: Retail Sales (EUR mn), 2024-2023



Source: LZ

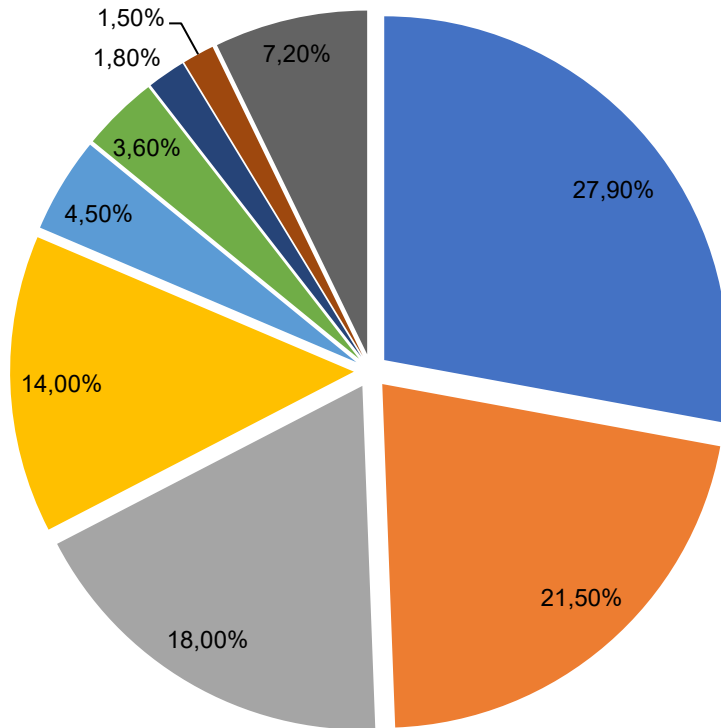
All figures are carefully prepared by LZ using the most recent data from retailers combined with our own estimates and insight.

Retailer Charts and Tables



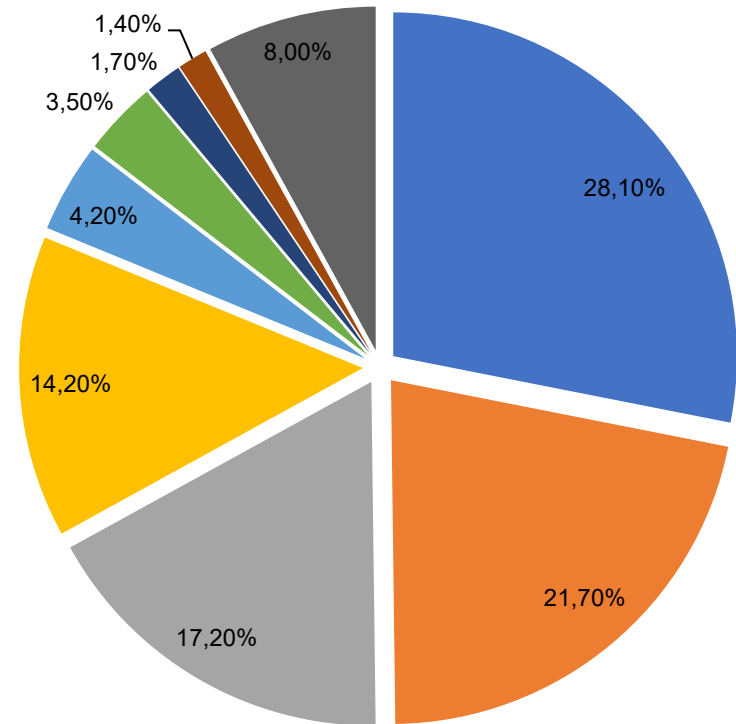
In this chart we explicitly show retailers with a market share above 2.5%. Any other players in the region are summed up as "Others".

Germany: Retailers by Market Share, 2024 (%)



■ Edeka
■ Schwarz Group
■ Rewe Group
■ Aldi
■ dm
■ Rossmann
■ Norma
■ Globus
■ Others

Germany: Retailers by Market Share, 2023 (%)



■ Edeka
■ Schwarz Group
■ Rewe Group
■ Aldi
■ dm
■ Rossmann
■ Norma
■ Globus
■ Others

Source: LZ

All figures are carefully prepared by LZ using the most recent data from retailers combined with our own estimates and insight.

Retailer Charts and Tables



Germany: Retailers by Retail Sales, 2024 + 2023

	2024		2023	
	Retailer	Retail Sales in EUR (mn)	Retailer	Retail Sales in EUR (mn)
1	Edeka	67,035	Edeka	65,565
2	Schwarz Group	51,650	Schwarz Group	50,600
3	Rewe Group	43,130	Rewe Group	40,175
4	Aldi	33,700	Aldi	33,100
5	dm	10,750	dm	9,895
6	Rossmann	8,535	Rossmann	8,090
7	Noma	4,200	Norma	3,950
8	Globus	3,600	Globus	3,370
9	Müller	3,200	Müller	3,150
10	Bünting	1,750	Bünting	1,663
11	Dohle	1,700	Dohle	1,585
12	Bartels-Langness	1,681	Bartels-Langness	1,682
13	Netto (Salling Group)	1,300	Netto (Salling Group)	1,350
14	Teegut	1,290	Teegut(Migros/basi)	1,400
15	Denns Biomarkt	962	Denns Biomarkt	869
16	V-Markt	885	V-Markt	
17	Reformhaus	720	Reformhaus	1,608
18	Klaas + Kock	690	Klaas + Kock	670
19	Alnatura	625	Alnatura	650
20	Mixmarkt	580	Mixmarket Monolith Group	490

Source: LZ

All figures are carefully prepared by LZ using the most recent data from retailers combined with our own estimates and insight.



Germany: Retailers by Retail Sales, 2024 + 2023

2024			2023		
	Retailer	Retail Sales in EUR (mn)		Retailer	Retail Sales in EUR (mn)
21	Wasgau	450		Wasgau	560
22	Fleggard/Calle	400		Fleggard/Calle	400
23	Bio Company	201		Bio Company	205
24	Konsum Leipzig	180		Konsum Leipzig	201
25	CAP	170		CAP	190

Retailer Charts and Tables



Germany: Retailers by Number of Stores, 2024 + 2023

	2024		2023	
	Retailer	Number of Stores	Retailer	Number of Stores
1	Edeka	11,028	Edeka	11,649
2	Rewe Group	7,305	Rewe Group	7,204
3	Aldi	4,244	Aldi	4,249
4	Schwarz Group	4,017	Schwarz Group	4,035
5	Rossmann	2,288	Rossmann	2,288
6	dm	2,131	dm	2,108
7	Norma	1,360	Norma	1,340
8	Reformhaus	914	Reformhaus	871
9	Müller	582	Müller	576
10	Denns Biomärkte	370	Dennree	530
11	Netto Salling Group (Dansk Supermarked)	342	Netto Salling Group (Dansk Supermarked)	342
12	Teegut	308	Teegut	344
13	Bünting	257	Bünting	251
14	Klaas + Kock	208	Klaas + Kock	211
15	Mixmarkt Monolith	189	Mixmarkt Monolith	185
16	Bartels Langness	182	Bartels Langness	205
17	Alnatura	153	Alnatura	152
18	CAP	102	Cap	103
19	Dohle	92	Dohle	92
20	Wasgau	70	Wasgau	69

Source: LZ

All figures are carefully prepared by LZ using the most recent data from retailers combined with our own estimates and insight.



Germany: Retailers by Number of Stores, 2024 + 2023

2024			2023		
	Retailer	Number of Stores		Retailer	Number of Stores
21	Globus	65		Globus	65
22	Bio Company	61		Bio Company	61
23	Konsum Leipzig	61		Konsum Leipzig	59
24	V Markt Georg Jos. Kaes	39		V Markt Georg Jos. Kaes	39
25	Fleggaard/Calle	13		Fleggaard/ Calle	16

Store Tracker

Alle Edeka-Märkte in Deutschland

Edeka betreibt aktuell **5886** Standorte* in Deutschland.

Rewe in Deutschland

Rewe Group betreibt aktuell **4216** Standorte* in Deutschland.

Kaufland in Deutschland

Kaufland betreibt aktuell **788** Standorte* in Deutschland.

Store Tracker

Aldi Nord in Deutschland

Aldi Nord betreibt aktuell **2233** Standorte* in Deutschland.

Aldi Süd in Deutschland

Aldi Süd betreibt aktuell **2018** Standorte* in Deutschland.

Lidl in Deutschland

Lidl betreibt aktuell **3271** Standorte* in Deutschland.

Netto Marken-Discount in Deutschland

Netto Marken-Discount betreibt aktuell **4405** Standorte* in Deutschland.

Source: LZ

All figures are carefully prepared by LZ using the most recent data from retailers combined with our own estimates and insight.

Store Tracker

Penny in Deutschland

Penny betreibt aktuell **2121** Standorte* in Deutschland.

Norma in Deutschland

Norma betreibt aktuell **1359** Standorte* in Deutschland.

Source: LZ

All figures are carefully prepared by LZ using the most recent data from retailers combined with our own estimates and insight.

Store Tracker

Denns Biomarkt in Deutschland

Denns Biomarkt betreibt aktuell **505** Standorte* in Deutschland.

dm Drogeriemarkt in Deutschland

dm Drogeriemarkt betreibt aktuell **2184** Standorte* in Deutschland.

Rossmann in Deutschland

Rossmann betreibt aktuell **2354** Standorte* in Deutschland.

Store Tracker

Edeka Group		11.028	67.035 Mio. €
Edeka SM , Feneberg	Vollsortiment	6.061	45.640 Mio. €
Marktkauf	Vollsortiment	109	2.680 Mio. €
Netto, NP, Diska	Discount	4.669	18.225 Mio. €
Budni	Drogeriemarkt	189	490 Mio. €
Schwarz Group		4.017	51.650 Mio. €
Lidl	Discount	3.237	30.400 Mio. €
Kaufland	Vollsortiment	780	21.250 Mio. €
Rewe Group		7.305	43.130 Mio. €
Rewe/ Center , Ihr Kaufpark	Vollsortiment	3.769	31.300 Mio. €
Penny	Discount	2.124	9.800 Mio. €
Nahkauf , Rewe To Go	Nahversorgung	1.412	2.030 Mio. €
Aldi Group		4.244	33.700 Mio. €
Aldi Süd	Discount	2.025	19.100 Mio. €
Aldi Nord	Discount	2.219	14.600 Mio. €

Source: LZ

All figures are carefully prepared by LZ using the most recent data from retailers combined with our own estimates and insight.

Store Tracker

DISCOUNT STORES

Aldi	Discount	4.244	33.700 Mio. €
Lidl	Discount	3.237	30.400 Mio. €
Netto, NP, Diska	Discount	4.669	18.225 Mio. €
Penny	Discount	2.124	9.800 Mio. €
Norma	Discount	1.360	4.200 Mio. €

Source: LZ

All figures are carefully prepared by LZ using the most recent data from retailers combined with our own estimates and insight.

Summary

Net sales from stores of the 25 leading German food retailers rose from around €233 billion in 2023 to almost €240 billion in 2024. This represents growth of 2.8 %, slightly above the rate of inflation. During the two-year period of high inflation, growth in the food retail sector lagged behind inflation figures. Last year, therefore, sales volumes roughly kept pace with turnover once again.

The figures for the individual food retailers differ slightly from their published company data, particularly in the case of the leading cooperatives, as neither wholesale nor specialist retail chains for beverages and pet food, nor online shops, are included. Non-food sales within the food retail outlets are, however, included.

Summary

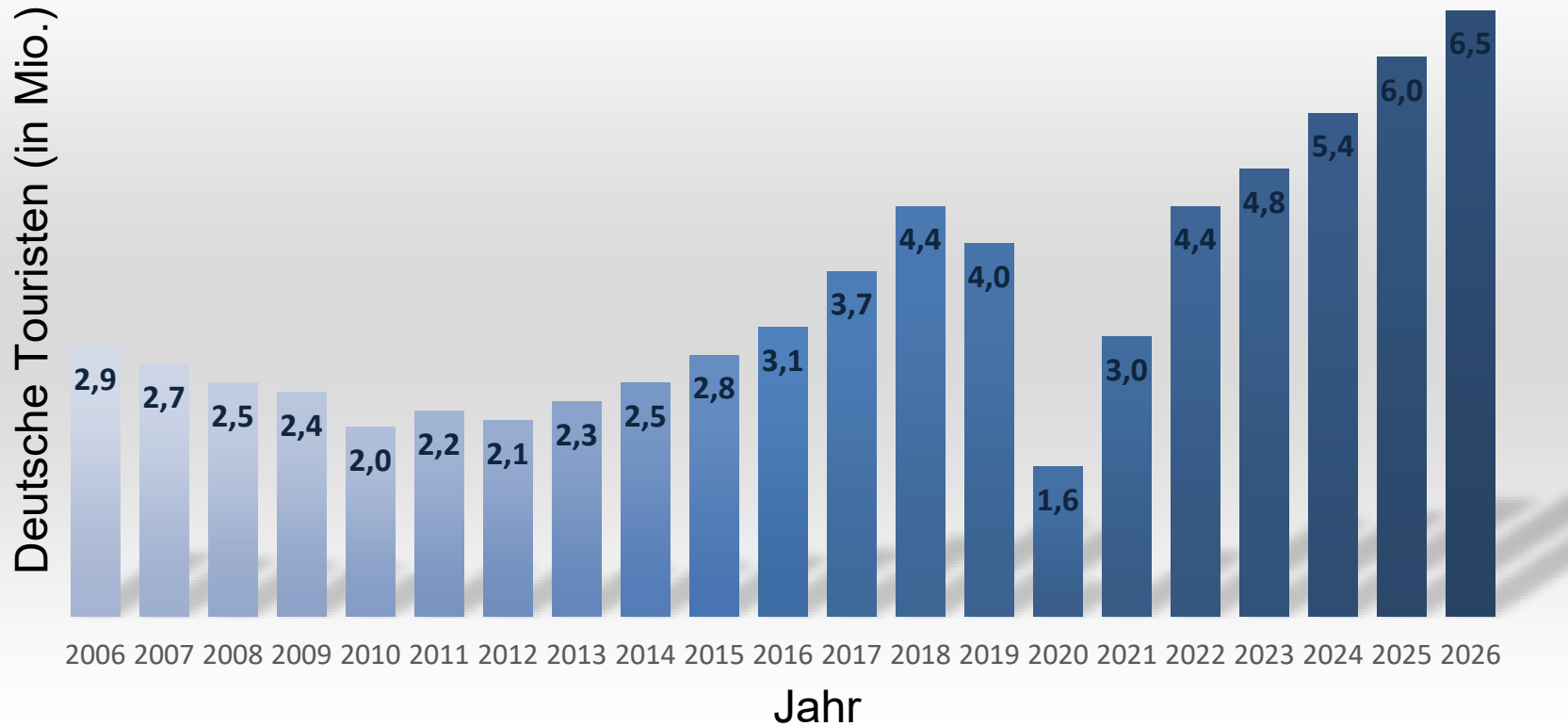
The Rewe Group saw sales rise by around €2.5 billion, making it the growth leader in the retail sector. According to Rewe's financial statements, independent retailers alone increased their share of full-range sales from €31.3 billion to €19 billion, with a 7 per cent rise in turnover. Under Rewe's management, growth was only around 3 % .

The eight RTG partners (Rossmann, Globus, Bünting, Bartels-Langness, Netto ApS, Tegut, V-Markt, Kaes and Klaas & Kock) generated a combined turnover of €19.73 billion, giving them an 8.2 % share of this leading group.

The four organic and health food retailers together account for €2.5 billion.

Touristen aus Deutschland in Griechenland – (2006–2026, mit Prognose 2026)

Deutsche Touristen 20 jährige Entwicklung



Εισερχόμενη ταξιδιωτική κίνηση ανά κατηγορία χώρας προέλευσης (σε χιλ. ταξιδιώτες)

ΠΙΝΑΚΑΣ 3: Εισερχόμενη ταξιδιωτική κίνηση ανά κατηγορία χώρας προέλευσης ⁽⁶⁾ (σε χιλ. ταξιδιώτες) ^(απ)										
	Ιανουάριος - Ιούλιος					Ιούλιος				
	2024	2025	(%) Μεταβολή	2026 ^(α)	(%) Μεταβολή	2024	2025	(%) Μεταβολή	2026 ^(α)	(%) Μεταβολή
Χώρα προέλευσης										
Χώρες ΕΕ-27	10.816,5	10.648,7	-1,6	11.561,2	8,6	3.969,7	4.235,7	6,7	3.913,7	-7,6
Χώρες ζώνης ευρώ	8.710,4	8.425,9	-3,3	9.534,5	13,2	3.111,1	3.147,0	1,2	3.166,1	0,6
εκ των οποίων:	0,0	0,0		0,0		0,0	0,0		0,0	
Γαλλία	1.064,5	972,5	-8,6	923,2	-5,1	388,5	362,4	-6,7	315,8	-12,9
Γερμανία	2.604,6	2.812,4	8,0	3.029,5	7,7	838,3	963,4	14,9	987,7	2,5
Ιταλία	990,7	1.021,5	3,1	1.272,6	24,6	402,1	404,3	0,5	544,8	34,7
Χώρες ΕΕ-27 εκτός ζώνης ευρώ	2.106,1	2.222,7	5,5	2.026,7	-8,8	858,6	1.088,7	26,8	747,6	-31,3
Λουιτές χώρες	7.166,2	7.806,2	8,9	8.482,1	8,7	2.387,3	2.527,3	5,9	2.638,6	4,4
εκ των οποίων:	0,0	0,0		0,0		0,0	0,0		0,0	
Ηνωμένο Βασίλειο	2.266,1	2.299,1	1,5	2.581,2	12,3	894,5	777,1	-13,1	901,7	16,0
ΗΠΑ	788,6	903,9	14,6	829,9	-8,2	210,2	209,7	-0,2	173,2	-17,4
ΣΥΝΟΛΟ	17.982,6	18.454,9	2,6	20.043,3	8,6	6.357,0	6.763,1	6,4	6.552,3	-3,1

Πηγή: Τράπεζα της Ελλάδος

ΠΑΡΑΚΑΛΩ ΣΗΜΕΙΩΣΤΕ

Οι πληροφορίες αυτές αφορούν τις δύο
πρώτες κατηγορίες του γερμανικού
λιανεμπορίου , δηλαδή τα πάντα εκτός
από τα στοιχεία του HORECA

Στρατιγική διείσδυσης στη γερμανική αγορά

- Πρώτα και βασικά αντλούμε τις σωστές πληροφορίες και τα σωστά δεδομένα
- Πάνω σε αυτές τις πληροφορίες καταστρώνουμε τη σωστή στρατιγική που περιλαμβάνει τις εξής παραμέτρους:

Μια αποδεκτή τιμή για το προϊόν μας.

Στόχος : ιδιωτική ετικέτα

Αν στοχεύουμε κανάλι ιδιωτικής ετικέτας , τότε πρωτεύοντα ρόλο έχει η τιμή και δευτερεύοντα ρόλο αλλά εξίσου σημαντικό έχει η αποδεκτή ποιότητα με πιστοποιήσεις (IFS) που πρέπει να διαθέτουμε και η επαγγελματική αντιμετώπιση του πιθανού πελάτη μας

Στόχος : επώνυμο προϊόν

Αν στοχεύουμε στο κανάλι των επώνυμων προϊόντων , τότε πρέπει στο μυαλό μας να έχουμε μια ολοκληρωμένη στρατιγική όπου εκτός από την αποδεκτή τιμή και ποιότητα , θα πρέπει να γνωρίζουμε εκ των προτέρων ότι δε θα πουλήσουμε απλά ένα προϊόν αλλά μία ιστορία

Θα πρέπει έτσι να ασχοληθούμε με τα εξής στάδια:

- Δημιουργία ιστορίας
- Δημιουργία προστιθέμενης αξίας με νέα μορφή ή συσκευασία προϊόντος
 - Επικοινωνία της ιστορίας αυτής

Για να έχουμε επιτυχημένο αποτέλεσμα χρειάζεται
χρόνος , χρήμα , υπομονή και επιμονή

Ενέργειες υποστήριξης του προϊόντος

- Εβδομάδα γνωριμίας
 - Ειδική προβολή εντός των καταστημάτων
 - Προβολή στα φυλλάδια της αλυσίδας
- Παρουσία στο ειδικό αφιέρωμα της Ελλάδος στην LZ που διαβάζεται από όλους τους αγοραστές ελληνικών προϊόντων στη Γερμανία
 - Έντυπη- online-διαφήμιση στην τηλεόραση
- Προώθηση με άρθρα υποστηρικτικά στο γερμανικό τύπο

Lebensmittel Zeitung

Σας ευχαριστώ πολύ για την προσοχή σας!

Stavros Tsouroukidis

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