FINNISH GROCERY TRADE
2017

PTY

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PHOTOS P. 3 Kesko Oyj, other photos FGTA and image banks

LAYOUT Tiina Aaltonen, gra & grappo

PRINTING Erweko Oy 2017

DEREGULATION
MUST CONTINUE

Many indicators of the Finnish economy show cautious signs of recovery. The development can also be seen in the grocery trade where sales development has been weak or even negative for years. The volume development of the grocery trade's sales, 1.6%, in 2016 was strongest since 2007. Factors contributing to this included the deregulation of opening hours in early 2016, decrease in the price level of food and strengthening of consumers' trust.

It is important that this budding upward turn in the economy and consumers' purchasing power continue to grow stronger. We will also need measures to support positive economic development in future. The growing Finnish demand supports increasing the number of jobs and companies' investment opportunities in Finland.

Deregulation is one of Sipilä's government's key projects. Implementing this key project is also essential for Finnish trade. In the latest comparison between OECD countries, the regulation in Finnish retail trade was the fifth strictest among 27 countries. Trade regulation is significantly lighter in Sweden where also the profitability of retail business is clearly better than in Finland.

Trade regulation in Finland among the strictest in OECD countries.

The grocery trade is a significant taxpayer that brings work and supports living in all of Finland. Deregulating and demolishing excessive red tape will help ensure the preconditions for grocery trade's significant investments and for employing people in Finland as well as maintaining an extensive shop network. At the same time, the prerequisites for competition in the sector are increased.

A great example of successful deregulation is removing the limitations of shops' opening hours. This reform improved customers' service and brought thousands of new jobs to the commercial sector. Also the changes made in May 2017 in the Land Use and Building Act are necessary steps in the right direction. To ensure that its benefits are turned into reality, it is important that municipalities take into consideration the reform's objectives also in the changes of valid master plans.

Deregulation has started off well and it should be continued. Both the reform of the food legislation and the regional government reform present chances to lighten regulation and monitoring and making them more sensible. At the same time, it must be ensured that the administrative burden and authority fees of companies will not grow.

A quick way of bringing about deregulation is to remove the restrictions of the selections of shops. Sales restrictions should be removed especially for alcoholic beverages and pharmaceuticals. Finnish trade industry companies are responsible actors, and there are plenty of examples of lighter regulation in Europe. Finland should also continue bravely on the road leading to legislation reforms and increasing competition.

Jorma Rauhala
President of the Finnish Grocery Trade Association

DEVELOPMENT THROUGH SELF-REGULATION AND FREE COMPETITION

In Finland, also the food trade has woken up to find new ways to respond to the changes in society and global competition. The significance of the food supply chain on Finnish national economy, employment, regional development and the security of supply is considerable. That's why the question of improving the competitiveness of our food supply chain is important, and it cannot be answered without taking the chain into account as a whole. The current report on food politics still paid only a little attention to developing other operating conditions than those of the primary production. When planning the further actions of the process, we must assume a wider view.

In addition to a forward-thinking and a wide perspective, the development of the food industry must be based on the starting points of free competition, an encouraging regulation environment and industry's self-regulation. Also tax solutions can support the growth of the industry. One central aspect is deregulation of unnecessary norms. At the same time, it must be ensured that we don't create new restrictive and stiff legislation with one hand. Self-regulation and increasing co-operations are clearly a more flexible and efficient way of promoting matters than legislation. Increasing national or EU-level regulation is not Finland's benefit nor does it promote the competitive strengths and growth of the Finnish food supply chain.

SELECTION RESTRICTIONS MUST BE DEREGULATED ALSO IN FINLAND

Also Finland should move towards a more unregulated and free competitive environment by removing selection restrictions. The renewals and reforms can be realised in a responsible manner and incrementally, if necessary. The Alcohol Act reform has been in the works for long, and its aim to remove the sales restrictions of alcoholic beverages sold in shops will support the domestic market and restrict importing alcohol by tourists. The reform is especially important for small shops.

Also the distribution of pharmaceuticals must be renewed in Finland, like has been done in other Nordic countries. The reform can be realised without compromising the safety of medications so that the availability of pharmaceuticals is improved and distribution of medicine is ensured throughout Finland. At the same time, this would bring significant savings to consumers and the state in medical expenses. Instead of imagining threats, we should focus on maintaining a new kind of open and extensive discussion.

Kari Luoto
Managing Director of the Finnish Grocery Trade Association

Finland has the cheapest food in the Nordic countries

Finland is a large and sparsely populated country with high taxation and plenty of legislation regarding actors in the food industry. More than 40% of food prices consist of taxes and food VAT (14%) is almost triple when compared to the average of EU15 countries (5%). Without taxes, food prices in Finland are close to the average of EU countries. In 2015, food prices in Finland were the cheapest in the Nordic countries.

TRADE IS AN IMPORTANT PART OF SOCIETY

The grocery trade operations are vital in order for society to work and the everyday life of consumers to continue smoothly. Trade plays a significant role as a foundation block of society, ensuring services and the habitability of the entire country and providing employment opportunities.

Out of all the industries in Finland, the trade sector employs the most people. In 2016, it employed 290,000 people, approximately 62,000 of whom worked in the grocery trade and Foodsercive wholesales.

The Finnish grocery trade is characterised by the formation of chains and the centralisation of procurement and logistics. The situation is similar in the other Nordic countries; without large volumes it is impossible to be as efficient as necessary in vast, sparsely populated countries. Without sufficient cost-efficiency, prices would escalate, selections would shrink, and customers would have a poorer service and reduced accessibility.

The structure of the Finnish grocery trade has also been changed by the migration to growth centres, the increased use of cars as well as a more extensive selection of goods and underlying IT development that has made the management of such selection possible. In 25 years, the number of market-size stores has gone down from nearly 10,000 stores to approximately 3 000 stores. Selections have tripled in 20 years.

Large stores are clearly more cost efficient than smaller ones. For a long time, large stores have played a significant role in Finland. The largest stores, that is to say 30 per cent of stores, account for 81 per cent of all grocery sales. However, smaller stores are a lot more important than their volume might suggest in their role in maintaining the food supply and the habitability of the entire country and as local service providers.

In 2016, the value of grocery retail sales was approximately 16.738 billion euros.

The duties of grocery trade

- Creating the extensive selections to meet consumer demand.
- Maintaining the trade service network across the entire country.
- Developing food supply chain efficiency and productivity.
- Looking after food safety.
- Monitoring the sale of age-restricted products.
- Ensuring food supply and distribution in Finland.
- Ensuring free competition and availability of several purchasing channels.
- Securing employment.
- Taking environmental aspects into consideration in all operations.

Private labels are part of shop selections

With private labels, shops wants to offer consumers high-quality products needed in everyday life at affordable prices. Other objective of private labels include increasing customer loyalty, strengthening the market position and the chain brand, increasing retail trade's profit, improving the quality of products and ensuring the control of the supply chain. For a food industry company, an opportunity to manufacture private labels can present a great chance for expanding the customer base and turnover. The private label share of consumer purchases is approximately 25% (2017). On a European level, this figure is low as in France and Britain, the share of private labels is around 30–40%.

FOODSERVICE WHOLESALE TRADE IN FINLAND

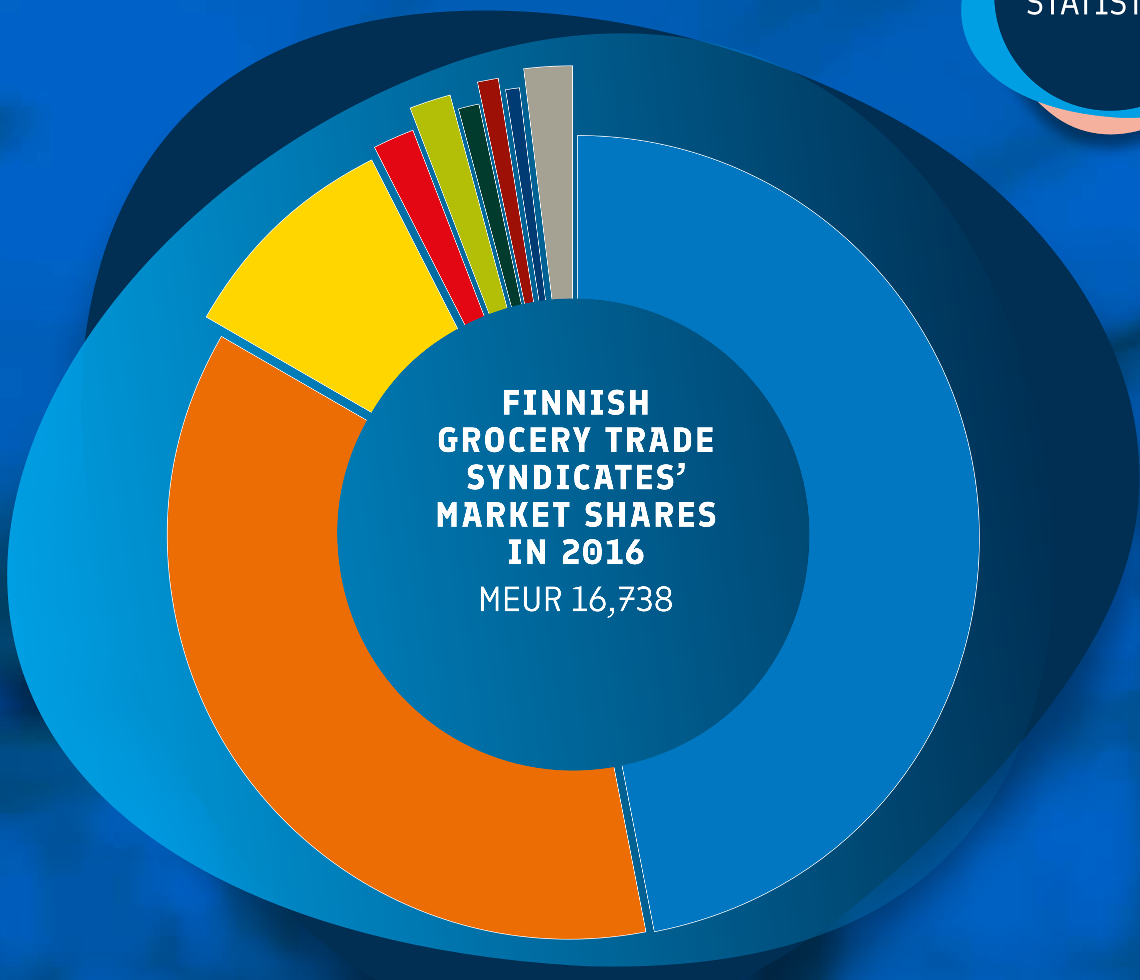
The Foodservice wholesale trade is in charge of external supply of items for the retail trade. The industry is also called HoReCa wholesales (Hotels, Restaurants and Catering), referring to one of the key customer groups of the industry. The Foodservice wholesale trade also has other important customer groups, such as public administration kitchens. The sector is a socially significant industry.

Every day, one in two Finns uses the services of Foodservice companies when having a meal or a coffee in restaurants, cafés, and workplace or school canteens. Hotels, cafés, restaurants and public administration institutions are the largest customer groups of Foodservice companies. About Finnish 20,355 professional kitchens, i.e. Foodservice points, serve their customers about 868 million meals per year. Most of their ingredients are purchased from Foodservice wholesalers.

RELIABLE SERVICE AND NEW TRENDS

Ensuring the safety of the products and deliveries and the security of delivery is especially important in the industry as the Foodservice wholesale trade operates in socially vulnerable functions such as child and old-age welfare and hospitals. The industry plays an important part in ensuring the security of supply in our country. The continuously united streams of goods and the extensive selections of wholesales create logistical efficiency while benefiting the environment.

The largest product groups in wholesale trade usually include fresh produce, frozen foods and ready-made foods. The companies in the Foodservice wholesale trade constantly develop their selections and listen to their customers carefully. The companies in the industry also introduce new international trends and products in Finland. The Foodservice wholesales of the member companies of the Finnish Grocery Trade Association operate nationally with an extensive selection and their revenue in 2016 was nearly EUR 2 million.



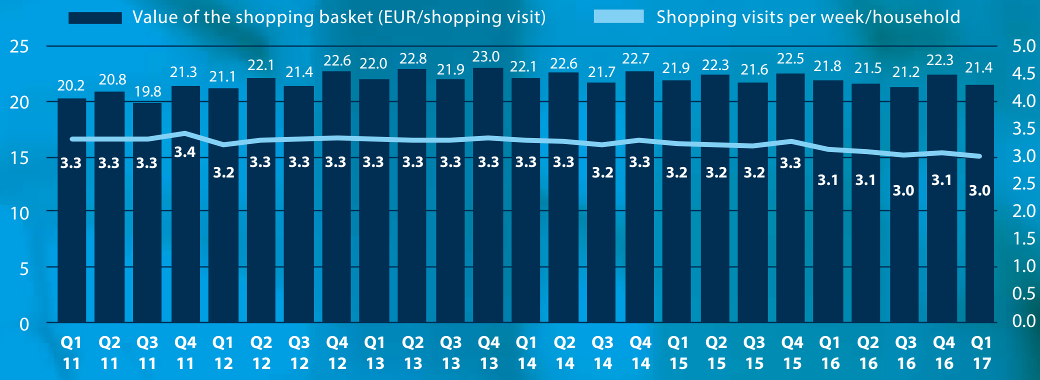
GROUP	MARKET SHARE %	GROCERY SALES (MEUR)
S Group	47.2%	7,896
K Group	36.2%	6,055
Lidl*	9.3%	1,551
Tokmanni Group*	1.7%	276***
Suomen Lähikauppa Oy (until 11 April 2016)	1.5%	249
Stockmann*	1.0%	165
Minimani*	0.6%	93
M-ketju*	0.6%	93**
Other private*	1.9%	360

Grocery sales incl. VAT Kesko Plc bought Suomen Lähikauppa Oy in April 2016.
Source: Nielsen Finland Oy, marked with*, source: Finnish Grocery Trade Association
** M-ketju figure total sales, incl. household goods, source: Finnish Grocery Trade Association
***Tokmanni Group, incl. all Tokmanni stores and their grocery sales, source Finnish Grocery Trade Association (PTY).
Nielsen Grocery Shop Directory only includes some of the Tokmanni stores.

KEY FIGURES 2016

Consumer goods purchase expenses

Value of the shopping basket (EUR) and shopping visits per week/household, quarter periods



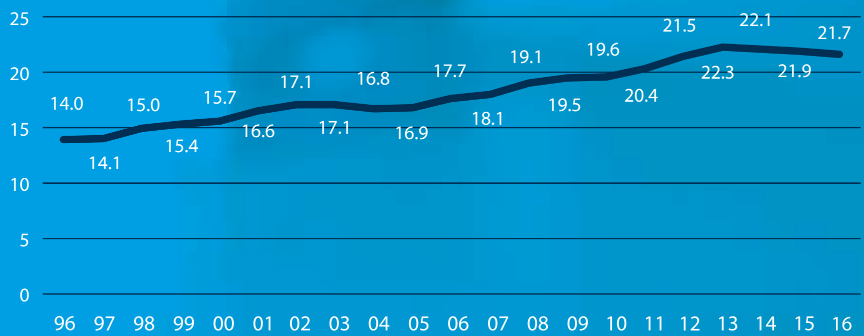
Source: Nielsen Homescan

Retail trade of consumer goods 2016 MEUR 16,738

Sales value development	0.9%
Sales volume development	1.6%
Sales per resident	EUR 3,000
Retail trade of consumer goods EUR/household (number of households in 2015*)	EUR 6,302
Number of stores (markets)	3,002
Plus special grocery stores/market halls/direct sale halls	877
Grocery trade sales area of grocery stores	2.2 million m²
Average sales per square metre	EUR 7,200/m²
Residents/grocery store	1,415

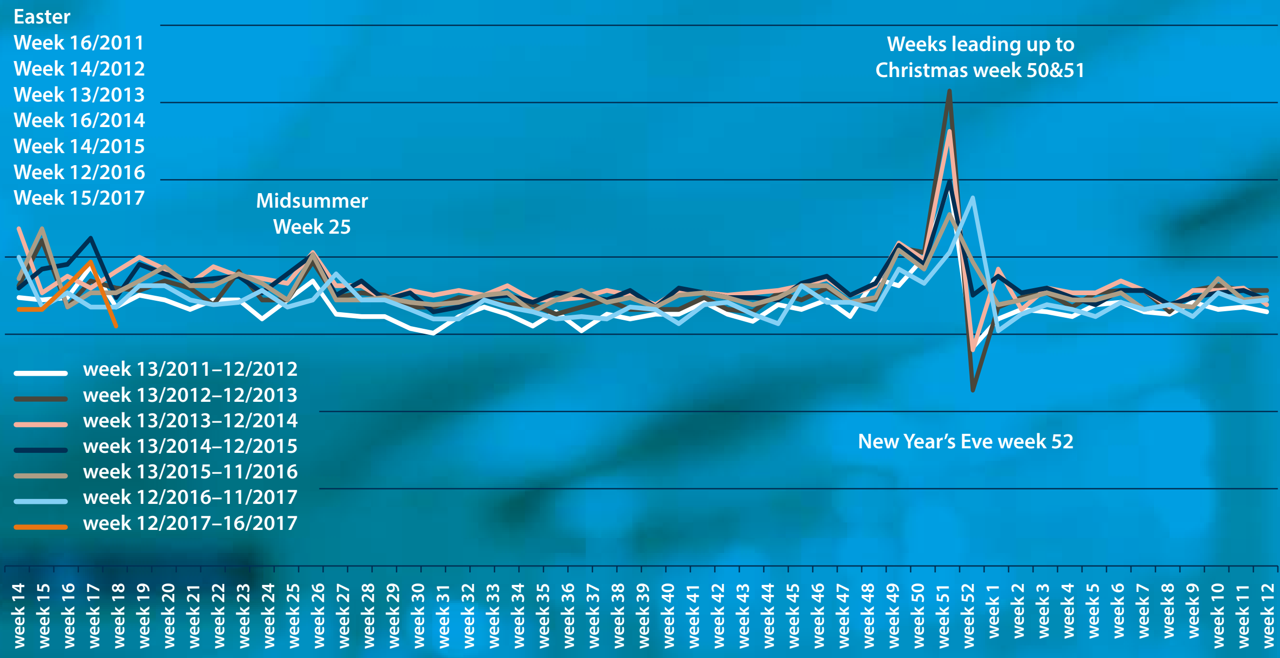
Source: Nielsen Finland Oy, *Statistics Finland

Shopping basket value (EUR) development 1996–2016



Source: Nielsen Homescan

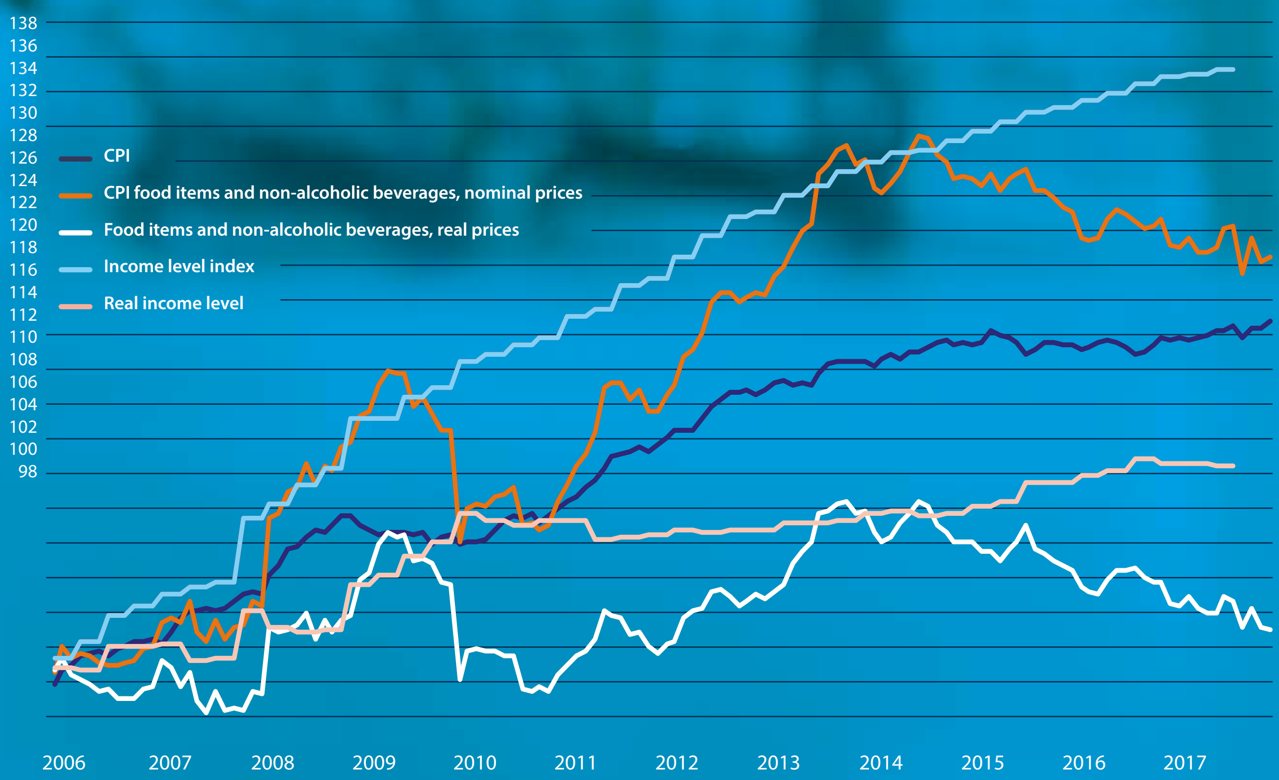
Weekly trend of grocery store purchase expenses | week 13/2011–16/2017



Source: Nielsen Homescan

Price development of food items compared to the inflation and the change in income level

(2005 = 100)



Source: Statistics Finland

Sales of grocery trade shops, value shift and volume shift 2002–2016

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Total number markets	3,533	3,529	3,584	3,532	3,364	3,361	3,365	3,351	3,283	3,216	3,192	3,171	3,157	3,090	3,002
Total number	4,163	4,129	4,192	4,109	3,942	3,922	3,904	3,917	3,923	3,964	3,981	4,066	4,101	4,004	3,879
Sales MEUR	10,948	11,265	11,529	11,601	12,028	12,842	13,934	14,339	14,331	15,104	15,891	16,399	16,599	16,424	16,308
Value shift %	5.1%	3.3%	1.7%	2.3%	4.2%	5.2%	8.1%	3.1%	0.0%	5.0%	5.1%	3.2%	0.9%	-0.7%	0.9%
Volume shift %	2.4%	2.7%	3.3%	2.4%	3.0%	3.5%	0.8%	-0.5%	0.0%	1.1%	-0.1%	0.1%	0.1%	0.4%	1.6%

Source: Nielsen Grocery Shop Directory

Number of stores by store type in 2016

Store type	Sales area/definition	Total 1 January 2016
Hypermarkets	Citymarket, Prisma, and Minimani	149
Department stores	≥ 1,000 m^2 (share of consumer goods in all sales less than 2/3)	88
Supermarkets, large	≥ 1,000 m^2 (share of consumer goods in all sales more than 2/3)	645
Supermarkets, small	400–999 m^2	405
Markets, large	200–399 m^2	1,009
Markets, small	100–199 m^2	349
Small shops	< 100 m^2	357
Special stores		847
Market halls/direct sale halls		30
Total 1 January 2015		**3,879**
Mobile shop cars and boats		13
Discontinued		890

Source: Nielsen Grocery Shop Directory

Sales of consumer goods by store type 2003–2016 (MEUR)

Store type	2003	2004	2005[1]	2006	2007	2008	2009	2010[2]	2011	2012[3]	2013	2014	2015	2016
Hypermarkets	2,618	2,692	2,772	2,984	3,150	3,460	3,706	3,802	4,131	4,398	4,524	4,519	4,592	4,726
Department stores	549	585	611	615	632	654	662	558	563	584	567	571	541	504
Supermarkets, large	3,458	3,718	3,789	3,984	4,347	4,704	4,827	4,913	5,140	5,482	5,775	6,019	6,046	6,307
Supermarkets, small	1,838	1,665	1,648	1,615	1,686	1,826	1,850	1,776	1,843	1,859	1,871	1,783	1,709	1,763
Markets, large	1,921	1,986	1,916	1,950	2,102	2,301	2,295	2,306	2,408	2,541	2,601	2,628	2,499	2,166
Markets, small	536	515	490	481	492	514	492	473	479	461	456	438	415	329
Small shops	194	212	216	238	271	308	332	317	321	325	338	346	324	220
Special stores and halls	151	155	158	160	163	167	175	185	218	240	268	296	298	293
Total	**11,265**	**11,528**	**11,600**	**12,027**	**12,843**	**13,934**	**14,339**	**14,331**	**15,104**	**15,891**	**16,399**	**16,599**	**16,424**	**16,308**
Mobile shop cars and boats	23	20	18	16	14	12	12	10	9	8	7	6	5	5
Discontinued	120	90	289	359	190	151	178	185	145	139	145	100	161	425
Total	**11,408**	**11,638**	**11,907**	**12,402**	**13,047**	**14,097**	**14,529**	**14,526**	**15,257**	**16,038**	**16,551**	**16,705**	**16,591**	**16,738**

Source: Nielsen Grocery Shop Directory

1 Store type classification changed for hypermarkets into a chain-based model, including the chains K-citymarket, Prisma, and Euromarket Other classifications remain. Changes made in the chart retrospectively.

2 Minimani included in hypermarkets as of 2010

3 Euromarket included in supermarkets, large as of 2012

Sales of consumer goods by chain in 2016

MEUR 16,738 (incl. those discontinued) stores total 3,879 (excl. those discontinued)

Syndicate	Chain	Number of stores	Grocery sales percentage	Grocery sales MEUR	Average sales/ store, MEUR
S Group	Prisma	64	16.0%	2,671	41.7
	S-market	434	22.9%	3,839	8.8
	Alepa + Sale	449	7.6%	1,271	2.8
	Other	88	0.7%	114	1.3
S Group total		**1,035**	*** 47.2%**	*** 7,896**	**7.6**
K Group	K-citymarket	80	11.8%	1,978	24.7
	K-supermarket	228	12.2%	2,047	9.0
	K-market	655	9.4%	1,572	2.4
	Siwa, Valintatalo, and Euromarket as of 12 April 2016	340	2.1%	343	1.0
	Other	145	0.7%	115	0.8
K Group total		**1,448**	*** 36.2%**	***6,055**	**4.2**
Lidl		**157**	**9.3%**	**1,551**	**9.9**
Tokmanni		***** 162**	**1.7%**	***** 276**	**1.7**
Suomen Lähikauppa Oy	Siwa	–	1.1%	177	0.4
	Valintatalo + Euromarket	–	0.4%	72	0.6
Suomen Lähikauppa total (until 11 April 2016)		**–**	*** 1.5%**	*** 249**	**0.4**
Stockmann	GT sales of department stores	**7**	**1.0%**	**165**	**23.6**
Minimani		**5**	**0.6%**	**93**	**18.6**
M-ketju		**70**	**0.6%**	**** 93**	**1.3**
Other		**995**	**1.9%**	**360**	**0.4**
ALL THOSE IN THE GROCERY SHOP DIRECTORY TOTAL		*** 3,879**	**100.0%**	*** 16,738**	*** 4.3**

Syndicate	Chain	Number of stores	Grocery sales MEUR	Average sales/ store, MEUR
R-kioski Oy	R-kioski	**599**	**285**	**0.5**

Number of stores at the end of 2016. Kesko Plc bought Suomen Lähikauppa Oy in April 2016.
Source:
* marked Nielsen Grocery Shop Directory
Others, source: Finnish Grocery Trade Association
** M-ketju incl. sales of household goods, source: Finnish Grocery Trade Association (PTY)
*** Number and sales of Tokmanni stores incl. all Tokmanni stores, source Finnish Grocery Trade Association (PTY). Nielsen Grocery Shop Directory only includes some of the Tokmanni stores.

Total sales (MEUR), number and sales development of FGTA's member company department stores in 2015 and 2016 (VAT 0%)

	Number 2015	Number 2016	Sales 2015	Sales 2016	Sales shift %
KESKO					
Citymarket	81	80	2,067	2,062	-0.2%
S GROUP					
Sokos	18	19	362	351	-3.0%
Prisma	64	64	2,863	3,030	5.8%
STOCKMANN department stores in Finland	7	7	543	451	-16.9%
TOKMANNI	156	162	756	776	2.7%
MINIMANI	5	5	110	109	-0.6%
TOTAL	**331**	**337**	**6,701**	**6,779**	**1.2%**

Source: Finnish Grocery Trade Association
E-commerce included in the statistics if the company has an online shop.

SALES OF CLOTHING AND FOOTWEAR IN 2016

The value of the entire clothing trade sank by 0.7% in 2016. The sales of footwear increased by 1.4% compared to the previous year. The share of sportswear in the entire trade of clothing and footwear was 20.3%.

Source: Finnish Association of Textile and Footwear Importers and Wholesalers.

Clothing trade 2016 MEUR 2,689 (-0.7%)

EUROPEAN ONLINE STORES
MEUR 167, 6.2% (+22.3%)

OTHER CLOTHING TRADE MEUR 537, 20.0% (-6.1%)

OTHER SPORTSWEAR TRADE MEUR 50, 1.9% (-9.1%)

DEPARTMENT STORES' SPORTSWEAR
MEUR 80, 3.0% (-1.9%)

SPORTS TRADE CHAINS MEUR 294, 11.0% (+6.4%)
Budget Sport, Intersport, Kesport, Sportia, Stadium, Top-Sport, Erätukku, XXL

CHAINS MEUR 928.0, 34.5% (-2.1%)
Aleksi 13, Dressmann, H&M, Halonen, KappAhl, Lindex, Marimekko, Nanso, Seppälä, Moda, Zara, VILA, Vero Moda, Polarn O Pyret, Texmoda, Jack&Jones, Only, Name it, Selected, Ellos, Zara, Brothers, FilippaK, Mango

DEPARTMENT STORES MEUR 632, 23.5% (-0.7%)
Anttila, Citymarket, Prisma, Sokos, Stockmann, Tokmanni*

**Anttila was removed from the statistics because of bankruptcy in the middle of 2016.*

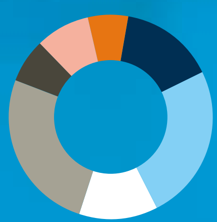
Footwear trade in 2016 MEUR 583 (1.4%)

E-COMMERCE FROM EU COUNTRIES MEUR 37.2, 6.4% (+22.1%)

OTHER SPORTS FOOTWEAR TRADE
MEUR 50, 8.6% (-7.4%)

DEPARTMENT STORES' SPORTS FOOTWEAR
MEUR 40.9, 7.0% (+3.0%)

SPORTS CHAINS MEUR 150.5, 25.8% (+0.9%)
Budget Sport, Intersport, Kesport, Erätukku, SGN Sportia, Stadium, Top-Sport, XXL



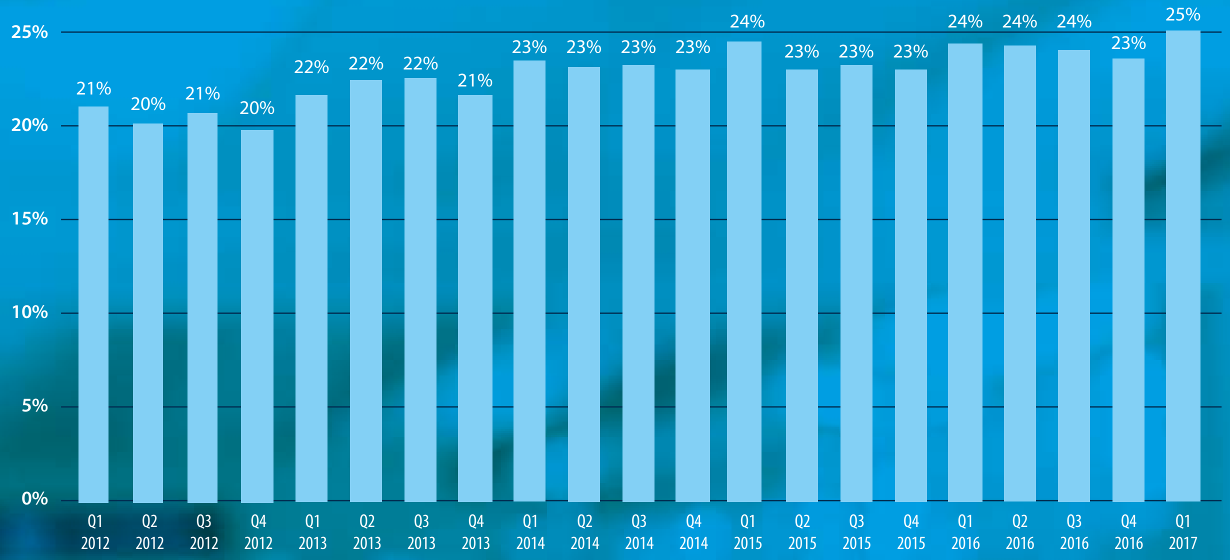
CHAINS MEUR 87, 14.8%, (-0.6%)
Aleksi 13, Din Sko, Halonen, Koo-Kenkä, Lindex, Marimekko, Seppälä, Zara, Vagabond

DEPARTMENT STORES MEUR 145, 24.9% (+4.2%)
Anttila, Citymarket, Prisma, Sokos, Stockmann, Tokmanni*

SHOE SHOPS MEUR 73,
12.5%, (-3.0%)

**Anttila was removed from the statistics because of bankruptcy in the middle of 2016.*

Share of commercial brands in consumer goods purchases (percentage)
Quarter periods 2012–2017



The size differences between bars with the same percentage are due to decimal rounding.

Source: Nielsen Homescan

Village shops 2016, excl. those discontinued

Province		Number	Grocery sales, M EUR	Percentage
1	Uusimaa	20	7.8	6.2%
2	Finland Proper	29	10.4	8.3%
4	Satakunta	11	3.8	3.0%
5	Tavastia Proper	9	1.8	1.5%
6	Pirkanmaa	20	8.5	6.8%
7	Päijänne Tavastia	5	3.7	2.9%
8	Kymenlaakso	11	4.2	3.3%
9	South Karelia	11	5.7	4.5%
10	Southern Savonia	13	6.4	5.1%
11	Northern Savonia	17	5.6	4.4%
12	North Karelia	10	5.2	4.1%
13	Central Finland	9	2.8	2.2%
14	Southern Ostrobothnia	14	4.6	3.7%
15	Ostrobothnia	22	12.8	10.2%
16	Central Ostrobothnia	6	5.7	4.6%
17	Northern Ostrobothnia	23	14.3	11.4%
18	Kainuu	8	1.7	1.4%
19	Lapland	22	12.2	9.7%
20	Åland	15	8.5	6.8%
Total		**275**	**125.8**	**100.0%**

Source: Nielsen Grocery Shop Directory

PTY

THE FINNISH GROCERY TRADE ASSOCIATION

The Finnish Grocery Trade Association (PTY) is a lobbyist for the grocery trade and Foodservice wholesale trade in industrial and social policy-making processes. The operational prerequisites of the sectors and the member companies of the association are developed with the help of proactive and informed lobbying. The objective is that the grocery trade acts in an environment of free competition and is known as a responsible operator that takes the consumers' interest into account.

Trade is a significant employer and investor in Finland and it is important to pay attention to its perspectives in social decision-making processes. The Finnish Grocery Trade Association (PTY) also actively cooperates with the Finnish Commerce Federation in its lobbying operations. In addition to industrial lobbying, the Finnish Grocery Trade Association also develops sector-wide, non-competitive operational models promoting efficiency and the realisation of social responsibility as well as cooperation throughout the value chain. For instance, product safety and self-monitoring work secures a high level of safety for food items and products to ensure the trust of the consumers.

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TOKMANNI	**Tokmanni Group** | **www.tokmanni-konserni.fi** Isolammintie 1, FIN-04600 Mäntsälä • Tel. +358 (0)20 778 2000
minimani	**Minimani** | **www.minimani.fi** Yrittäjäntie 12, FIN-60100 Seinäjoki • Tel. +358 (0)29 080 1580
M	**‚M Itsenäiset Kauppiaat Oy** | **www.m-ketju.fi** Uudenmaankatu 106, FIN-05840 Hyvinkää • Tel. +358 (0)400 837 025

MEMBER ORGANISATIONS

KAUPPIASLIITTO	**K Retailer Federation** | **www.k-kauppiasliitto.fi** Sörnäistenkatu 2, FIN-00580 HELSINKI • Tel. +358 (0)10 53 010

PROCUREMENT COMPANIES

SOK	**SOK Corporation** | **www.s-kanava.fi** P.O. BOX 1, FIN-00088 S-RYHMÄ • Fleminginkatu 34, FIN-00510 HELSINKI • Tel. +358 (0)10 76 8011
K	**Kesko Food** | **www.kesko.fi** Satamakatu 3, FIN-00016 KESKO • Satamakatu 3, FIN-00160 HELSINKI • Tel. +358 (0)10 5311
TUKO LOGISTICS	**Tuko Logistics Cooperative** | **www.tuko.fi** P.O. BOX 115, FIN-04201 KERAVA • Postlarinkatu 4, FIN-04200 KERAVA • Tel. +358 (0)20 77 111¸
MEIRA NOVA	**MeiraNova Oy** | **www.meiranova.fi** Palkkitie 10, FIN-4300 Tuusula • Tel. +358 (0)10 76 86 500

Grocery trade and **Foodservice wholesale trade** employ about

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Finnish Grocery Trade Association PTY

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