



FINNISH GROCERY TRADE

2020



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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 objective is that the grocery trade acts in an environment of free competition and is known as a responsible sector and an 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 also actively co-operates 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 co-operation throughout the value chain.

Organisation

Board of Directors

Working Groups 2020

Retail Group | Foodservice Wholesale Group | Local Grocery Store Group
Resource Efficiency Group | Product Safety Group | Self-monitoring Group
Communications Group | Steering group regarding issues related to GS1

Personnel

Business policy – Managing Director **Kari Luoto**
Product safety, foodservice wholesale legislation – Senior Advisor, LL.M. **Merja Söderström**
Supply chain development – Director **Ilkka Nieminen**
Administration and finances – Administrative Assistant **Terhi Karunka**
Retail and distribution pool – Emergency Preparedness Manager **Lauri Kulonen**
Legislation – Legal Counsel, LL.M. **Tea Taivalkoski**
Food safety, self-monitoring – Food Specialist **Anna Salminen**
Support services – Assistant **Heidi Nylund**
Communications, statistics – Communications Manager **Mari Mattila**

MARKET SHARE OF THE FINNISH GROCERY TRADE GROUPS IN 2019

EUR 18.647 billion

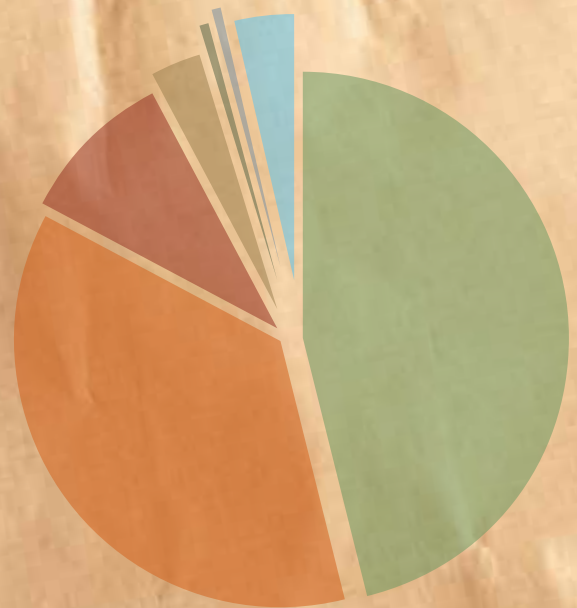
| | | | |
|---|------------------------|-------|--------------------|
|  | S GROUP | 46.2% | EUR 8 615 million |
|  | K GROUP | 36.5% | EUR 6 809 million |
|  | LIDL | 9.6% | EUR 1 797 million |
|  | TOKMANNI GROUP* | 3.1% | EUR 579 million ** |
|  | MINIMANI* | 0.5% | EUR 99 million |
|  | M-KETJU* | 0.4% | EUR 75 million *** |
|  | OTHER PRIVATE* | 3.6% | EUR 672 million |

Grocery sales incl. VAT
Source: Nielsen Grocery Shop Directory

* marked, source: Finnish Grocery Trade Association

** Statistical model used for Tokmanni was modified in 2018. Therefore, the group's figures are not comparable with previous years.

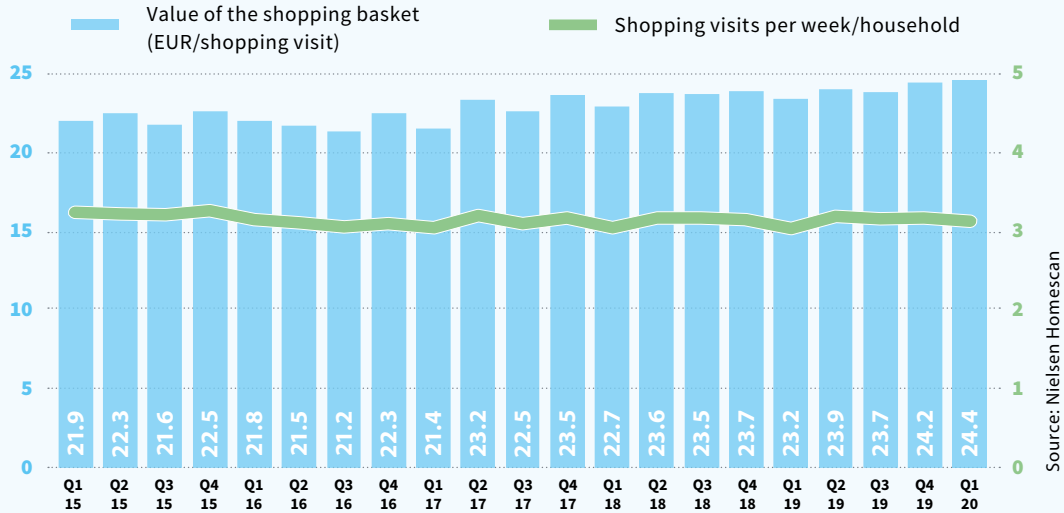
*** M-ketju figure total sales, incl. some household goods, source: Finnish Grocery Trade Association



KEY FIGURES 2019

Consumer goods purchase expenses

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



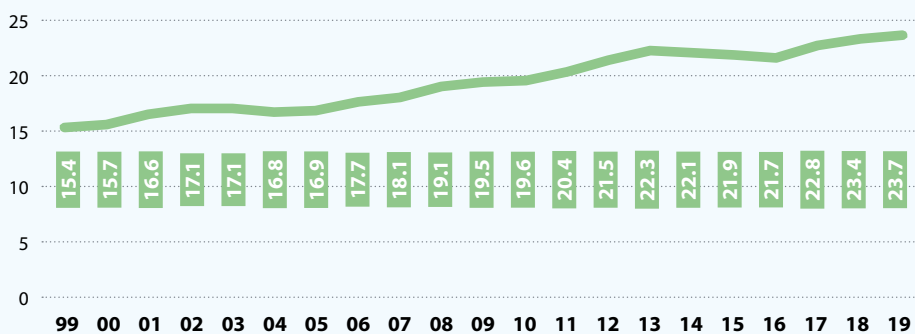
Source: Nielsen Homescan

Retail trade of consumer goods 2019 • MEUR 18,647

| | |
|--|----------------------------|
| Sales value development | 2.5 % |
| Sales volume development | 0.6 % |
| Sales per resident | EUR 3,400 |
| Retail trade of consumer goods EUR/household (number of households in 2018*) | EUR 6,783 |
| Number of shops (markets) | 2,789 |
| Plus specialised grocery shops / market halls / direct sale halls | 774 |
| and low-cost shops and service station shops (part of grocery trade) | 944 |
| Grocery sales area in grocery shops (excl. specialised markets) | 2.3 million m ² |
| Average sales per square metre | EUR 7,200/ m ² |
| Residents/grocery shop | 1,224 |

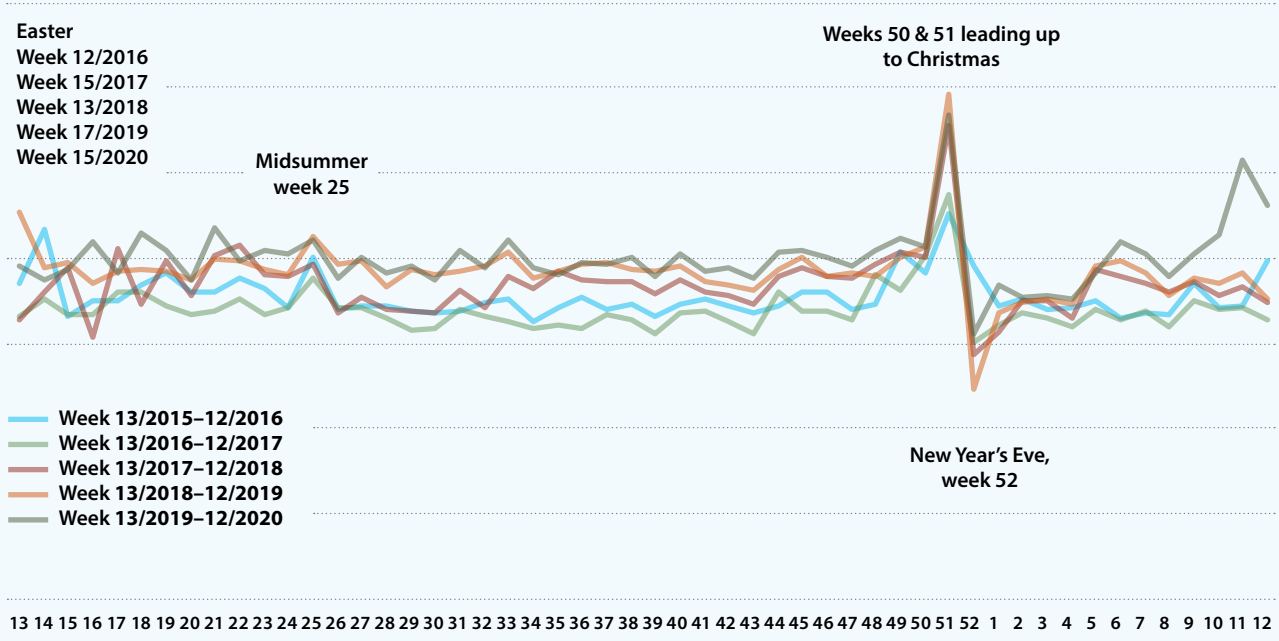
Sources: Nielsen Grocery Shop Directory, *Statistics Finland

Shopping basket value (EUR) development 1999–2019



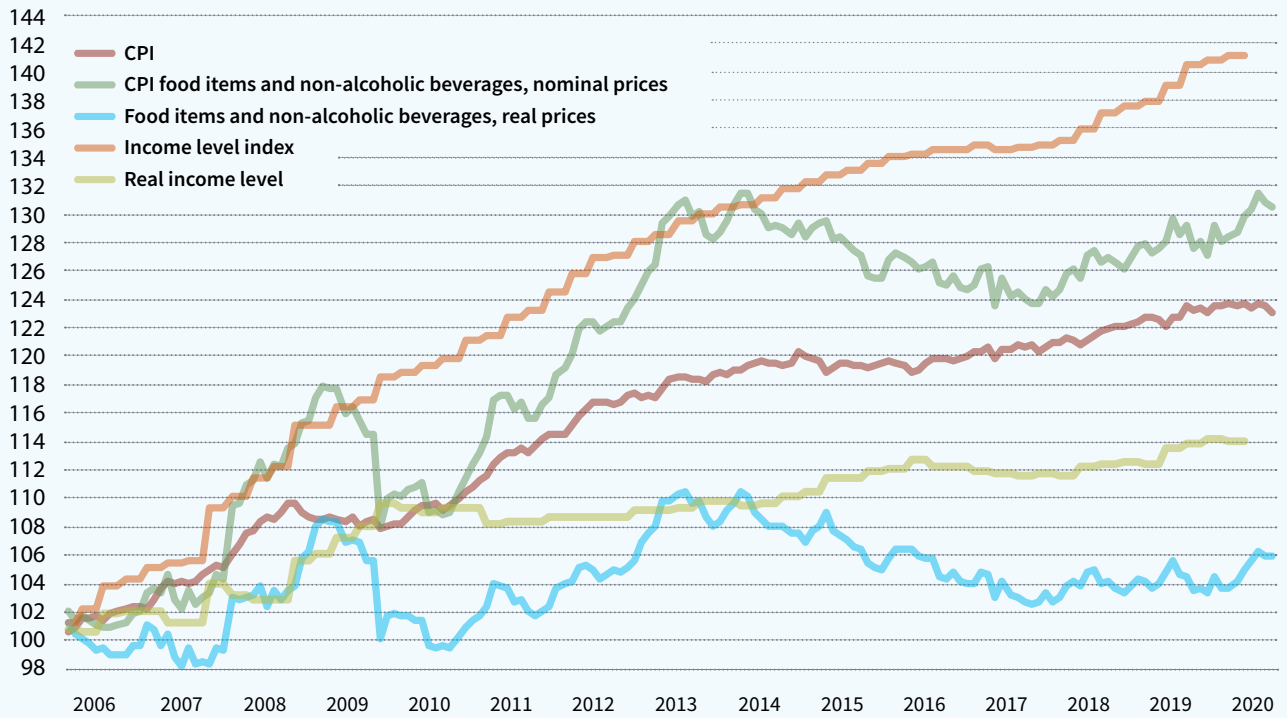
Source: Nielsen Homescan

Weekly trend of grocery shop purchase expenses | week 13/2015–12/2020



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 2016–2019

| | 2016 | 2017 | 2018 | 2019 |
|--|--------|--------|--------|--------|
| Total number markets (excl. specialised markets) | 3,002 | 2,824 | 2,804 | 2,789 |
| Total number (incl. specialised markets) | 4,882 | 4,624 | 4,550 | 4,507 |
| Total sales, MEUR (excl. those discontinued) | 16,976 | 17,340 | 18,078 | 18,520 |
| Value shift % | | 1.0 % | 3.4 % | 2.5 % |
| Volume shift % | | 1.0 % | 0.3 % | 0.6 % |

Source: Nielsen Grocery Shop Directory

Number of shops by shop type 2019

| SHOP TYPE | SALES AREA/DEFINITION | TOTAL 1 JANUARY 2020 |
|--|---|----------------------|
| Hypermarkets | Citymarket, Prisma and Minimani | 154 |
| Department stores | ≥ 1,000 m ² (share of consumer goods in all sales less than 2/3) | 87 |
| Supermarkets, large | ≥ 1,000 m ² (share of consumer goods in all sales more than 2/3) | 699 |
| Supermarkets, small | 400–999 m ² | 483 |
| Markets, large | 200–399 m ² | 836 |
| Markets, small | 100–199 m ² | 293 |
| Small shops | < 100 m ² | 237 |
| Specialist shops | | 745 |
| Market halls/direct sale halls | | 29 |
| Low-cost shops, part of grocery trade | | 353 |
| Service station shops, part of grocery trade | | 591 |
| Total 1 January 2020 | | 4,507 |
| Mobile shop cars and boats | | 11 |
| Discontinued | | 202 |

Source: Nielsen Grocery Shop Directory

Sales of consumer goods by shop type 2019 (MEUR)

| SHOP TYPE | SALES AREA/DEFINITION | TOTAL 1 JANUARY 2020 |
|--|---|----------------------|
| Hypermarkets | Citymarket, Prisma and Minimani | 5,303 |
| Department stores | ≥ 1,000 m ² (share of consumer goods in all sales less than 2/3) | 352 |
| Supermarkets, large | ≥ 1,000 m ² (share of consumer goods in all sales more than 2/3) | 7,169 |
| Supermarkets, small | 400–999 m ² | 2,183 |
| Markets, large | 200–399 m ² | 2,126 |
| Markets, small | 100–199 m ² | 368 |
| Small shops | < 100 m ² | 172 |
| Specialist shops | | 220 |
| Market halls/direct sale halls | | 29 |
| Low-cost shops, part of grocery trade | | 417 |
| Service station shops, part of grocery trade | | 180 |
| Total | | 18,520 |
| Mobile shop cars and boats | | 3 |
| Discontinued | | 125 |
| Total 1 January 2020 | | 18,647 |

Source: Nielsen Grocery Shop Directory

Sales of consumer goods by chain in 2019

MEUR 18,647 (incl. those discontinued) stores total 4,507 (excl. those discontinued)

| Syndicate | Chain | Number of shops | Grocery sales percentage | Grocery sales MEUR | Average sales/ shop, MEUR |
|----------------------|---------------|-----------------|--------------------------|--------------------|---------------------------|
| S Group | Prisma | 68 | 15.9% | 2,967 | 43.6 |
| | S-market | 433 | 21.7% | 4,055 | 9.4 |
| | Alepa + Sale | 461 | 7.4% | 1,387 | 3.0 |
| | Delicatessen | 6 | 0.5% | 97 | 16.2 |
| | Other | 87 | 0.6% | 110 | 1.3 |
| S Group total | | 1,055 | * 46.2% | *8,615 | 8.2 |
| K Group | K-Citymarket | 81 | 12.1% | 2,262 | 27.9 |
| | K-Supermarket | 243 | 12.5% | 2,326 | 9.6 |
| | K-Market | 777 | 11.3% | 2,116 | 2.7 |
| | Other | 142 | 0.6% | 107 | 0.8 |
| K Group total | | 1,243 | * 36.5% | * 6,809 | 5.5 |
| Lidl | | 186 | * 9.6% | * 1,797 | 9.7 |
| Tokmanni | | 191 | 3.1% | ** 579 | 3.0 |
| Minimani | | 5 | 0.5% | 99.4 | 19.9 |
| M-ketju | | 58 | 0.4% | *** 75.5 | 1.3 |
| Other | | 1,769 | 3.6% | 672 | 0.4 |
| TOTAL | | * 4,507 | 100% | * 18,647 | * 4.1 |

| Syndicate | Chain | Number of shops | Grocery sales MEUR | Average sales/ shop, MEUR |
|--------------------|-----------------|-----------------|--------------------|---------------------------|
| R-kioski Oy | R-kioski | 513 | 309 | 0.6 |

Number of shops at the end of 2019.

Sources: * marked Nielsen Grocery Shop Directory, others Finnish Grocery Trade Association

**Statistical model used for Tokmanni was modified in 2018. Therefore, the Group's figures are not comparable with previous years.

*** M-ketju incl. sales of some household goods, source: Finnish Grocery Trade Association

In K Group and S Group's figures, the difference between the sales figures of the chain and those of the whole group is due to decimal rounding.

Total sales (MEUR), number and sales development of FGTA's member company department stores in 2018 and 2019 (VAT 0%)

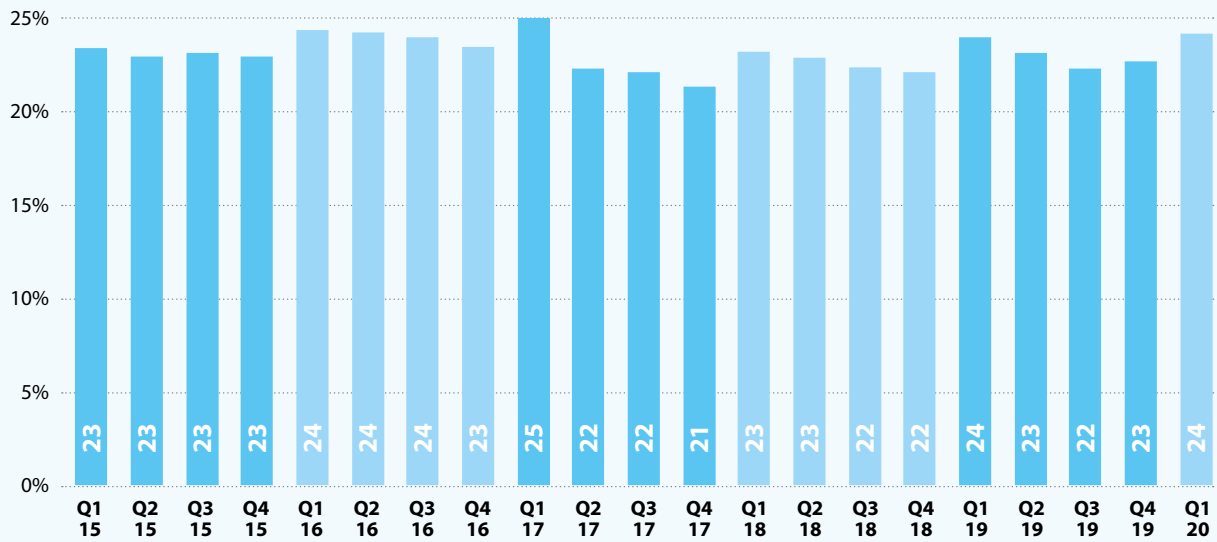
| | Number 2018 | Number 2019 | Sales 2018 | Sales 2019 | Sales shift, % |
|-----------------|-------------|-------------|--------------|--------------|----------------|
| KESKO | | | | | |
| K-Citymarket | 81 | 81 | 2,191 | 2,280 | 4.1% |
| S GROUP | | | | | |
| Sokos | 19 | 20 | 362 | 366 | 1.0% |
| Prisma | 66 | 68 | 3,156 | 3,255 | 3.1% |
| TOKMANNI | 186 | 191 | 870 | 944 | 8.5% |
| MINIMANI | 5 | 5 | 113 | 116 | 2.7% |
| TOTAL | 357 | 365 | 6,692 | 6,961 | 4.0% |

Source: Finnish Grocery Trade Association

E-commerce included in the statistics if the company has an online shop.

Share of private labels in consumer goods purchases (percentage)

Quarter periods Q1/2015–Q1/2020



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

Source: Nielsen Homescan

Village shops 2019. excl. those discontinued

| PROVINCE | NUMBER | GROCERY SALES, MEUR | PERCENTAGE |
|-------------------------|------------|---------------------|--------------|
| 1 Uusimaa | 15 | 5.8 | 5.9% |
| 2 Southwest Finland | 25 | 8.3 | 8.3% |
| 4 Satakunta | 10 | 3.3 | 3.3% |
| 5 Kanta-Häme | 6 | 1.7 | 1.7% |
| 6 Pirkanmaa | 14 | 7.2 | 7.2% |
| 7 Päijät-Häme | 4 | 1.7 | 1.7% |
| 8 Kymenlaakso | 8 | 3.3 | 3.3% |
| 9 South Karelia | 7 | 3.5 | 3.5% |
| 10 South Savo | 10 | 6.2 | 6.2% |
| 11 North Savo | 13 | 5.8 | 5.8% |
| 12 North Karelia | 8 | 5.1 | 5.1% |
| 13 Central Finland | 5 | 1.5 | 1.5% |
| 14 South Ostrobothnia | 11 | 4.0 | 4.0% |
| 15 Ostrobothnia | 17 | 8.5 | 8.6% |
| 16 Central Ostrobothnia | 6 | 5.9 | 5.9% |
| 17 North Ostrobothnia | 15 | 8.1 | 8.2% |
| 18 Kainuu | 8 | 1.7 | 1.8% |
| 19 Lapland | 19 | 11.3 | 11.4% |
| 20 Åland | 12 | 6.6 | 6.7% |
| Total | 213 | 99.2 | 100 % |

Source: Nielsen Grocery Shop Directory

MEMBER COMPANIES OF THE FINNISH GROCERY TRADE ASSOCIATION

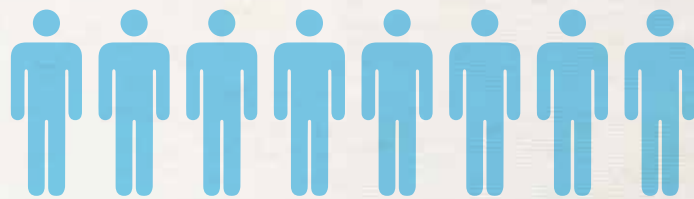
| | |
|---|---|
|  | SOK Corporation www.s-kanava.fi P.O. BOX 1, FI-00088 S Group • Fleminginkatu 34, FI-00510 HELSINKI • Tel. +358 (0)10 76 8011 |
|  | Kesko Food www.kesko.fi P.O. BOX 1, FI-00016 KESKO • Työpajankatu 12, FI-00580 HELSINKI • Tel. +358 (0)10 53030 |
|  | Lidl Finland Ky www.lidl.fi Niittymäentie 7, FI-02200 Espoo • Tel. +358 (0)9 234 561 |
|  | Tokmanni Group www.tokmanni-konserni.fi Isolammintie 1, FI-04600 Mäntsälä • Tel. +358 (0)20 778 2000 |
|  | R-kioski Oy www.r-kioski.fi P.O. BOX 1, FI-01641 VANTAA • Koivuvaarankuja 2, FI-01640 VANTAA • Tel. +358 (0)20 554 4000 |
|  | Wihuri Oy www.wihuri.fi Atomitie 5 A, FI-00370 HELSINKI • Tel. 020 510 10 |
|  | Heinon Tukku Oy www.heinontukku.fi Orionintie 18–22, FI-02200 ESPOO • Tel. 020 717 000 |
|  | Suomen Palvelutukkurit Oy www.palvelutukkurit.fi Äyritie 8 E, FI-01510 Vantaa • Tel. +358 (0)40 186 2948 |
|  | Minimani www.minimani.fi Yrittäjätie 12, FI-60100 Seinäjoki • Tel. +358 (0)29 080 1580 |
|  | M Itsenäiset Kauppiat Oy www.m-ketju.fi Uudenmaankatu 106, FI-05840 Hyvinkää • Tel. +358 (0)400 837 025 |

MEMBER ORGANISATIONS

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

PROCUREMENT COMPANIES

| | |
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|  | SOK Corporation www.s-kanava.fi P.O. BOX 1, FI-00088 S Group • Fleminginkatu 34, FI-00510 HELSINKI • Tel. +358 (0)10 76 8011 |
|  | Kesko Food www.kesko.fi P.O. BOX 1, FI-00016 KESKO • Työpajankatu 12, FI-00580 HELSINKI • Tel. +358 (0)10 53030 |
|  | MeiraNova Oy www.meiranova.fi Palkkitie 10, FI-4300 Tuusula • Tel. +358 (0)10 76 86 500 |



*Grocery trade and
Foodservice wholesale trade
employ about*

80,000
people.

*The industries invest
hundreds of millions
in Finland every year.*

Finnish Grocery Trade Association



PTY

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