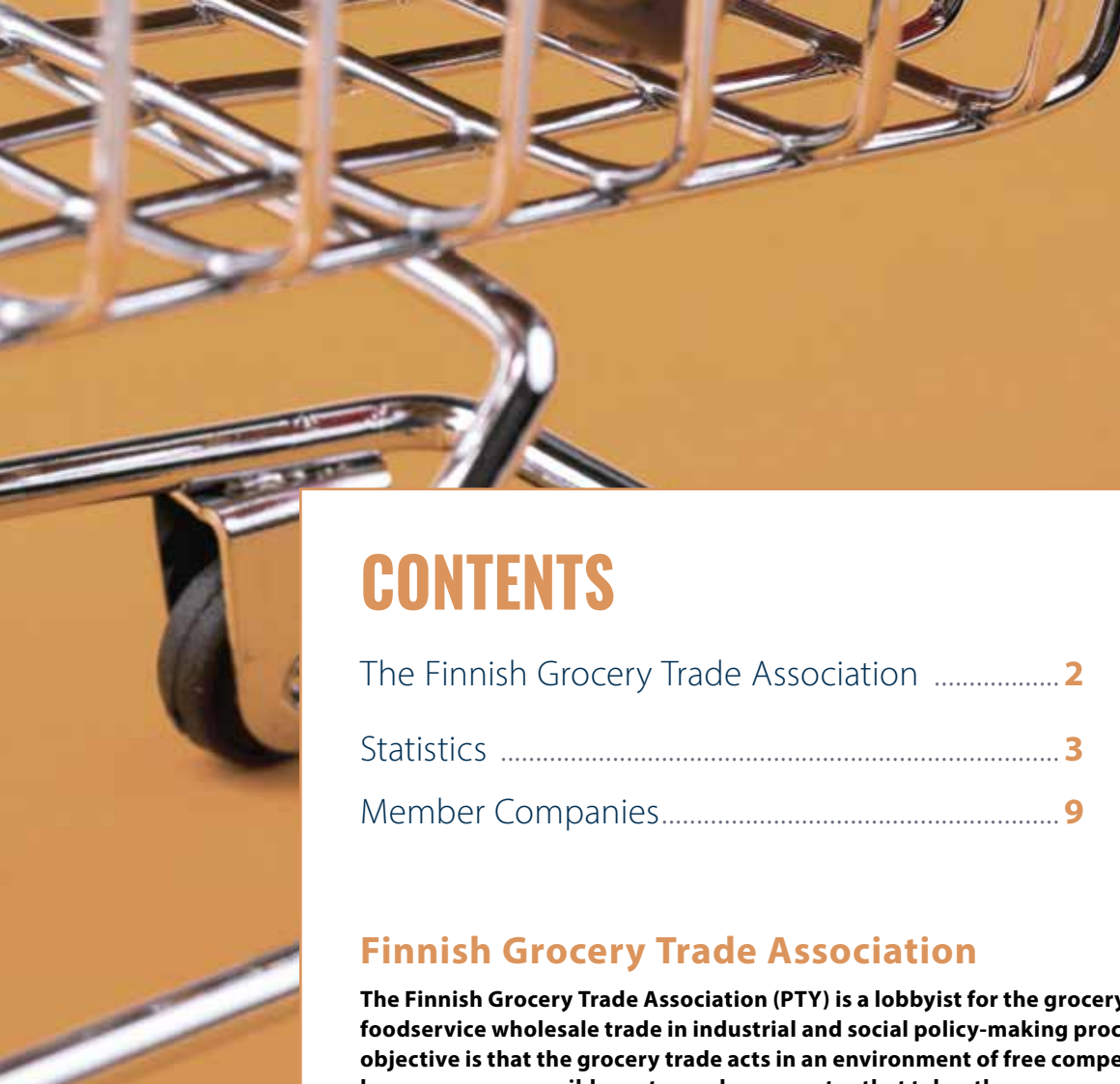




FINNISH GROCERY TRADE

2021

 PTY



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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 2021

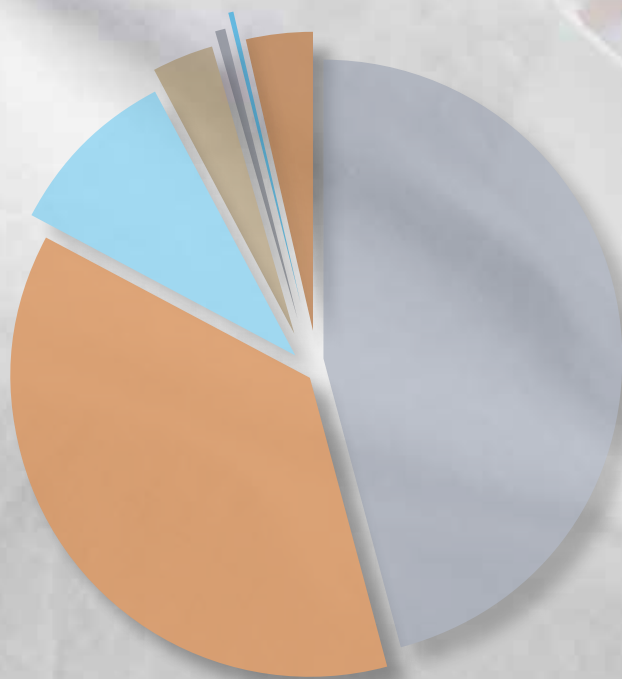
Retail Group | Foodservice Wholesale Group | Local Grocery Store Group
 Resource Efficiency Group | Product Safety Group | Self-monitoring Group
 Communications Group | Steering group regarding issues related to GS1




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 2020

EUR 20.231 billion



	S GROUP	46.0%	EUR 9,315 million
	K GROUP	36.9%	EUR 7,457 million
	LIDL	9.5%	EUR 1,924 million
	TOKMANNI GROUP*	3.2%	EUR 656 million **
	MINIMANI*	0.6%	EUR 116 million
	M-KETJU*	0.3%	EUR 69 million ***
	OTHER PRIVATE*	3.4%	EUR 694 million

Grocery sales incl. VAT
Source: NielsenIQ Grocery Shop Directory

* marked, source: Finnish Grocery Trade Association

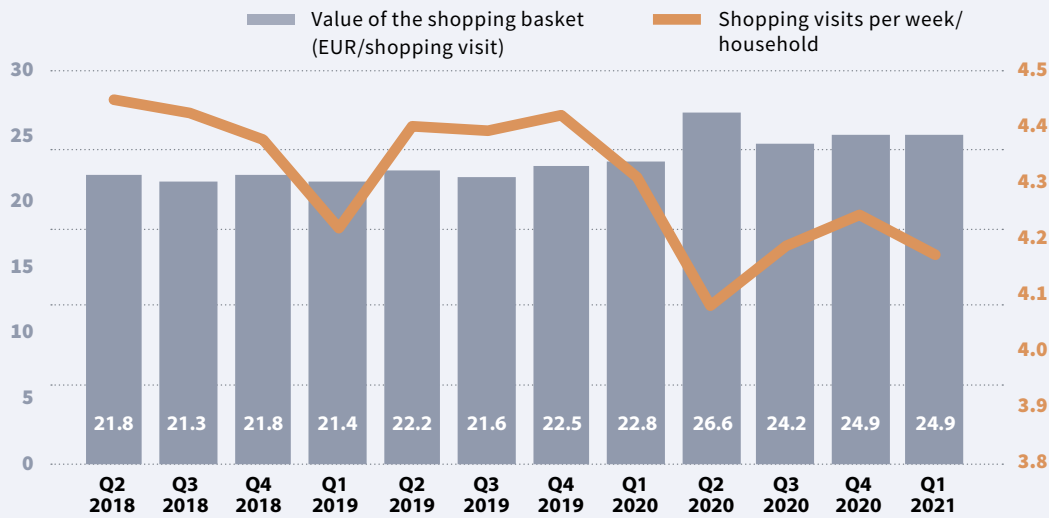
** Statistical model used for Tokmanni was modified in 2018. Therefore, the Group's figures are not comparable with previous years.

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

KEY FIGURES 2020

Consumer goods purchase expenses

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



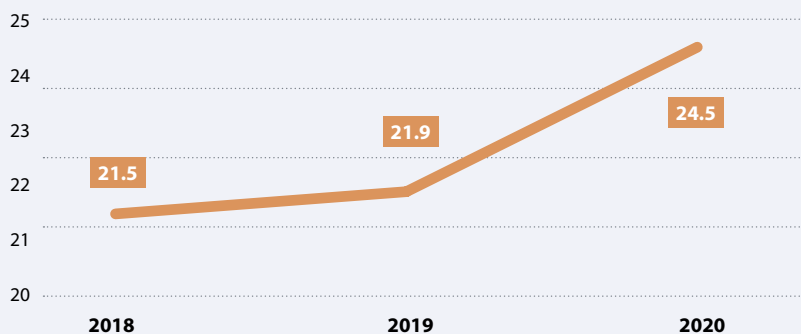
Source: NielsenIQ Homescan. The weighting method of the panel was changed in the beginning of 2021. Therefore, the data is comparable only until 2018.

Retail trade of consumer goods 2020 • MEUR 20,231

Sales value development	8.4%
Sales volume development	6.6%
Sales per resident	EUR 3,600
Retail trade of consumer goods EUR/household (number of households in 2019*)	EUR 7,259
Number of shops (markets)	2,763
Plus specialised grocery shops / market halls / direct sale halls / online grocery retailers (active in e-commerce only)	764
and low-cost shops and service station shops (part of grocery trade)	934
Grocery sales area in grocery shops (excl. specialised markets)	2.3 million m ²
Average sales per square metre	EUR 7,800/m ²
Residents/grocery shop	1,239

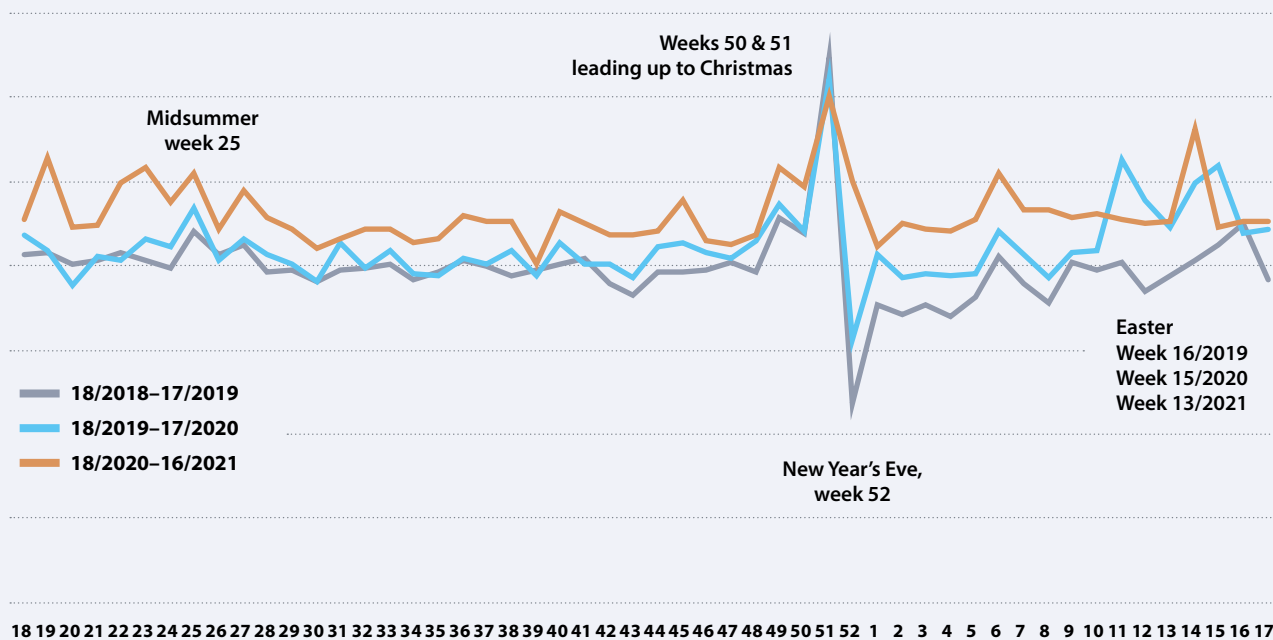
Sources: NielsenIQ Grocery Shop Directory, *Statistics Finland

Shopping basket value (EUR) development 2018–2020



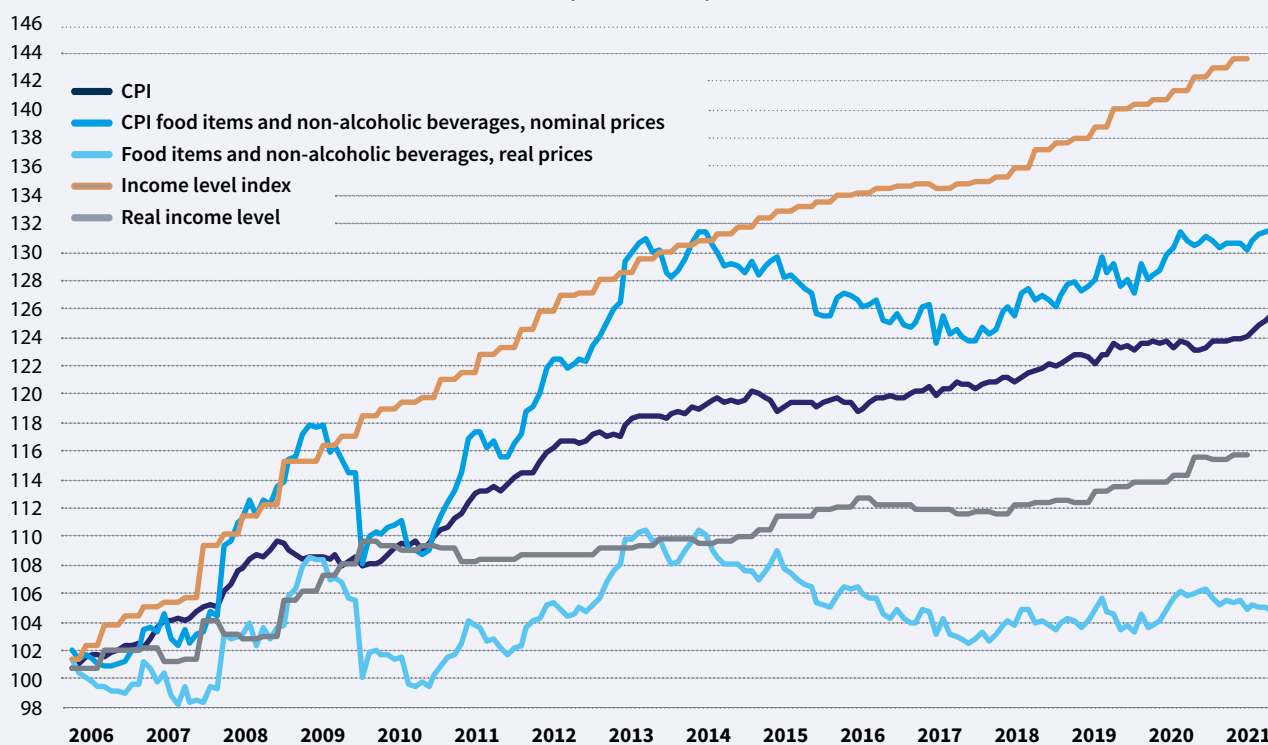
Source: NielsenIQ Homescan. The weighting method of the panel was changed in the beginning of 2021. Therefore, the data is comparable only until 2018.

Weekly trend of grocery shop purchase expenses | week 18/2018–16/2021



Source: NielsenIQ Homescan. The weighting method of the panel was changed in the beginning of 2021. Therefore, the data is comparable only until 2018.

Price development of food items compared to the inflation and the change in income level (2005 = 100)



Source: Statistics Finland

Number of grocery trade shops, value shift and volume shift 2016–2020

	2016	2017	2018	2019	2020
Total number markets (excl. specialised markets)	3,002	2,824	2,804	2,789	2,763
Total number (incl. specialised markets)	4,882	4,624	4,550	4,507	4,461
Value shift %		1.0%	3.4%	2.5%	8.4%
Volume shift %		1.0%	0.3%	0.6%	6.6%

Source: NielsenIQ Grocery Shop Directory
2020 figures include online grocery retailers (active in e-commerce only)

Number of shops by shop type 2020

SHOP TYPE	SALES AREA/DEFINITION	TOTAL 1 JANUARY 2021
Hypermarkets	Citymarket, Prisma and Minimani	157
Department stores	≥ 1,000 m ² (share of consumer goods in all sales less than 2/3)	86
Supermarkets, large	≥ 1,000 m ² (share of consumer goods in all sales more than 2/3)	703
Supermarkets, small	400–999 m ²	501
Markets, large	200–399 m ²	806
Markets, small	100–199 m ²	284
Small shops	< 100 m ²	226
Specialist shops / Market halls / Online grocery retailers (active in e-commerce only)		764
Low-cost shops, part of grocery trade		361
Service station shops, part of grocery trade		573
Total 1 January 2021		4,461
Mobile shop cars and boats		11
Discontinued		198

Source: NielsenIQ Grocery Shop Directory

Sales of consumer goods by shop type 2020 (MEUR)

SHOP TYPE	SALES AREA/DEFINITION	TOTAL 1 JANUARY 2021
Hypermarkets	Citymarket, Prisma and Minimani	5,928
Department stores	≥ 1,000 m ² (share of consumer goods in all sales less than 2/3)	396
Supermarkets, large	≥ 1,000 m ² (share of consumer goods in all sales more than 2/3)	7,715
Supermarkets, small	400–999 m ²	2,437
Markets, large	200–399 m ²	2,204
Markets, small	100–199 m ²	384
Small shops	< 100 m ²	169
Specialist shops / Market halls / Online grocery retailers (active in e-commerce only)		267
Low-cost shops, part of grocery trade		474
Service station shops, part of grocery trade		155
Total 1 January 2021		20,130
Mobile shop cars and boats		3
Discontinued		98
Total 1 January 2021		20,231

Source: NielsenIQ Grocery Shop Directory

Sales of consumer goods by chain in 2020

MEUR 20,231 (incl. those discontinued) stores total 4,461 (excl. those discontinued)

Syndicate	Chain	Number of shops	Grocery sales percentage	Grocery sales MEUR	Average sales/ shop, MEUR
S Group	Prisma	70	16.3%	3,305	47.2
	S-market	438	21.6%	4,364	10.0
	Alepa + Sale	459	7.2%	1,464	3.2
	Food Market Herkku	5	0.4%	81	16.2
	Other	84	0.5%	101	1.2
S Group total		1,056	* 46.0%	* 9,315	8.8
K Group	K-Citymarket	81	12.5%	2,537	31.3
	K-Supermarket	241	12.5%	2,538	10.5
	K-Market	769	11.3%	2,278	3.0
	Other	139	0.5%	104	0.7
K Group total		1,230	* 36.9%	* 7,457	6.1
Lidl		193	* 9.5%	* 1,924	10.0
Tokmanni		192	3.2%	** 656	3.4
Minimani		6	0.6%	116	19.3
M-ketju		52	0.3%	*** 69	1.3
Other		1,732	3.4%	694	0.4
TOTAL		*4,461	100%	* 20,231	* 4.5

Syndicate	Chain	Number of shops	Grocery sales MEUR	Average sales/ shop, MEUR
R-kioski Oy	R-kioskit	457	301	0.6

Number of shops at the end of 2020.

Sources: * marked NielsenIQ 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

Total sales (MEUR), number and sales development of FGTA's member company department stores in 2019 and 2020 (VAT 0%)

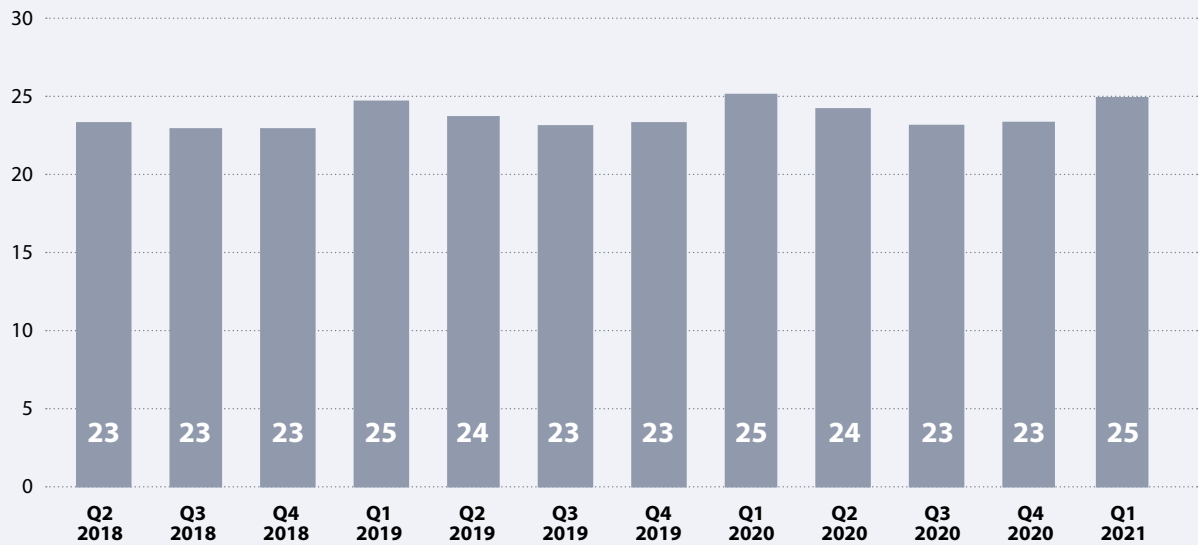
	Number 2019	Number 2020	Sales 2019	Sales 2020	Sales shift, %
KESKO					
K-Citymarket	81	81	2,280	2,506	9.9%
S GROUP					
Sokos	20	20	366	296	-19.1%
Prisma	68	70	3,255	3,569	9.7%
TOKMANNI	191	192	944	1,073	13.6%
MINIMANI	5	6	116	134	15.4%
TOTAL	365	369	6,961	7,578	8.9%

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 Q2/2018-Q1/2021



Source: NielsenIQ Homescan. The weighting method of the panel was changed in the beginning of 2021. Therefore, the data is comparable only until 2018.

Village shops 2020. excl. those discontinued


PROVINCE	NUMBER	GROCERY SALES, MEUR	PERCENTAGE
1 Uusimaa	13	6,3	6,9%
2 Southwest Finland	20	7,4	8,1%
4 Satakunta	8	1,4	1,5%
5 Kanta-Häme	6	1,9	2,0%
6 Pirkanmaa	13	7,3	7,9%
7 Päijät-Häme	6	2,9	3,2%
8 Kymenlaakso	5	2,9	3,1%
9 South Karelia	5	1,6	1,7%
10 South Savo	8	4,5	4,8%
11 North Savo	11	6,2	6,7%
12 North Karelia	7	3,5	3,8%
13 Central Finland	3	0,8	0,8%
14 South Ostrobothnia	11	3,6	4,0%
15 Ostrobothnia	16	8,2	8,9%
16 Central Ostrobothnia	5	5,9	6,4%
17 North Ostrobothnia	14	7,2	7,9%
18 Kainuu	9	1,6	1,7%
19 Lapland	19	11,8	12,8%
20 Åland	13	7,2	7,8%
Yhteensä	192	91,9	100%

Source: NielsenIQ Grocery Shop Directory

MEMBER COMPANIES OF THE FINNISH GROCERY TRADE ASSOCIATION

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	Lidl Finland Ky lidl.fi Niittymäentie 7, FI-02200 Espoo • Tel. +358 (0)9 234 561
	Tokmanni Group tokmanni.fi Isolammintie 1, FI-04600 Mäntsälä • Tel. +358 (0)20 778 2000
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	Wihuri Oy wihuri.fi Wihurinaukio 2, FI-00570 Helsinki • Tel. +358 (0)20 510 10
	Heinon Tukku Oy heinontukku.fi Orionintie 18–22, FI-02200 Espoo • Tel. +358 (0) 20 717 000
	Suomen Palvelutukkurit Oy palvelutukkurit.fi Äyritie 8 E, FI-01510 Vantaa • Tel. +358 (0)40 186 2948
	Minimani minimani.fi Yrittäjäntie 12, FI-60100 Seinäjoki • Tel. +358 (0)29 080 1580
	M Itsenäiset Kauppiat Oy m-ketju.fi Hämeenkatu 21–23, FI-05800 Hyvinkää • Tel. +358 (0)400 837 025

MEMBER ORGANISATIONS

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