



PTY

30

1992-2022



# FINNISH GROCERY TRADE

2022





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## Finnish Grocery Trade Association

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**The Finnish Grocery Trade Association (PTY) is a lobbyist for the grocery retail trade and foodservice wholesale trade in industrial and social policy decision-making processes. The objective is that the grocery trade acts in an environment of free competition in Finland and is known as a responsible sector and an operator that takes the consumers' interest into account.**

**The trade sector 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 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

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### Board of Directors

#### Working Groups 2022

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

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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**

#### TEXTS

Finnish Grocery Trade Association

#### TRANSLATION

Delingua Language Services

#### PHOTOS

PTY








#### LAYOUT

Tiina Aaltonen, Gra & Grappo

# MARKET SHARES OF THE FINNISH GROCERY TRADE GROUPS IN 2021

## EUR 20,866 MILLION



	MARKET SHARE, %	GROCERY SALES, MEUR
 S GROUP	46.1	9,618
 K GROUP	36.6	7,631
 LIDL	9.6	2,006
 TOKMANNI*	3.3	683**
 MINIMANI*	0.6	126.7
 M-KETJU*	0.3	65.7***
 OTHER PRIVATE*	3.5	736

Grocery sales incl. VAT

Source: NielsenIQ Grocery Shop Directory

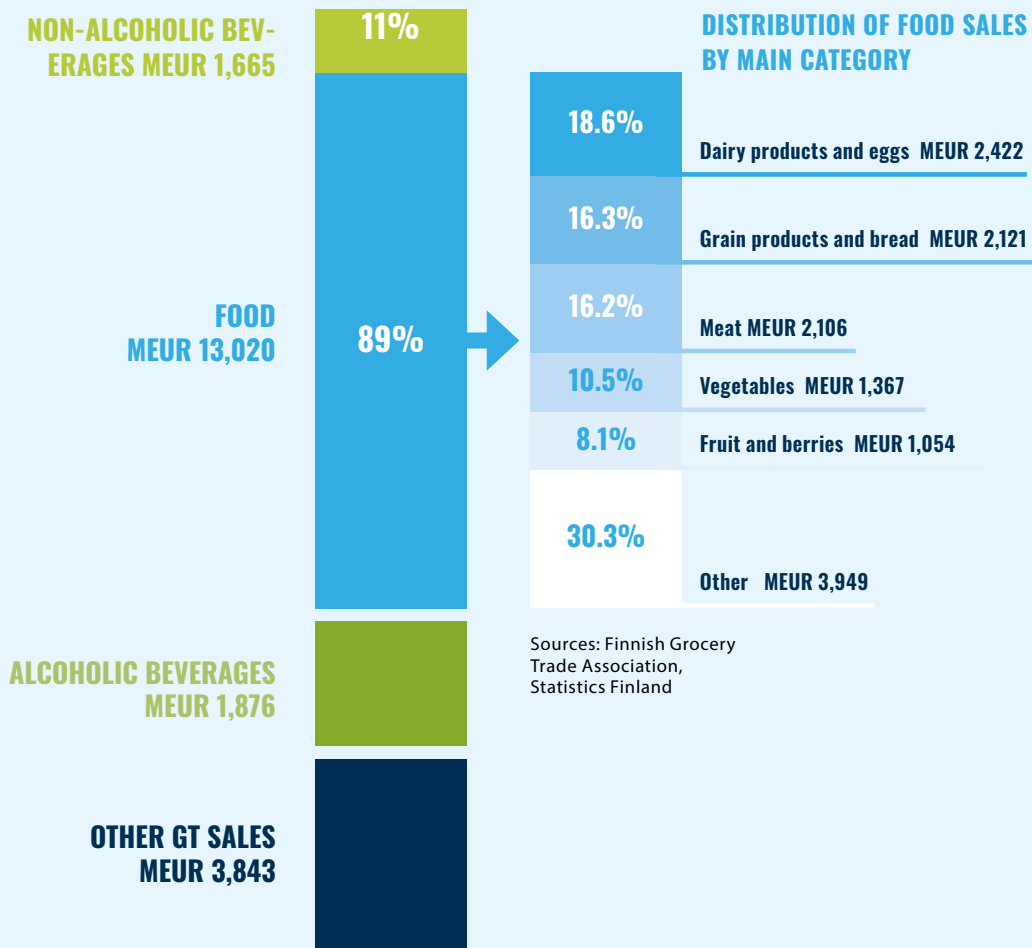
Information with an asterisk (\*), source: Finnish Grocery Trade Association

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

\*\*\* M-ketju's sales includes sales of household goods, source: Finnish Grocery Trade Association

# KEY FIGURES 2021

## Retail sales of food and non-alcoholic beverages in 2021 EUR 14,685 million



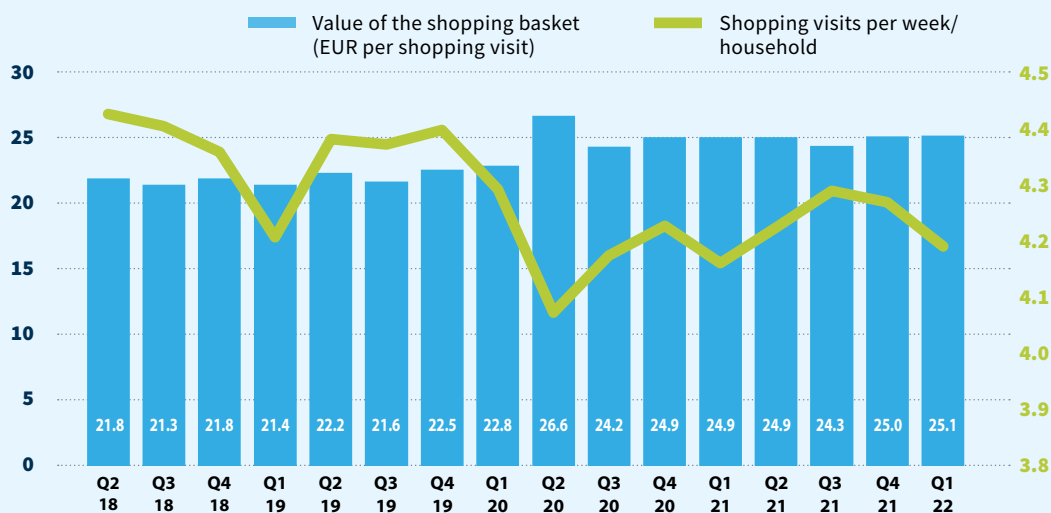
## Grocery retail sales 2021 • MEUR 20,866

Sales value development	3.1%
Sales volume development	0.7%
Sales per resident	EUR 3,800
Grocery retail sales EUR per household (number of households in 2020*)	EUR 7,371
Number of shops (markets)	2,779
Plus specialised grocery shops / market halls / direct sale halls / online grocery retailers (active in e-commerce only)	764
and discount stores and service station shops (part of grocery trade)	933
Grocery sales area in grocery shops (excl. specialised markets)	2.3 million m <sup>2</sup>
Average sales per square metre	EUR 7,900 per m <sup>2</sup>
Residents per grocery shop	1,236

Sources: NielsenIQ Grocery Shop Directory, \*Statistics Finland

### Groceries purchase costs

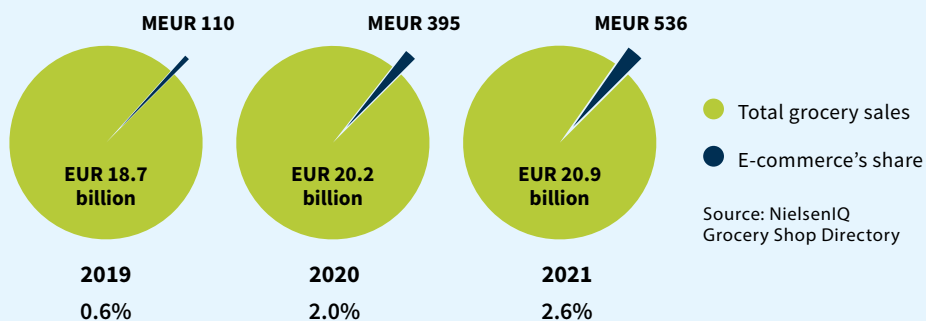
Value of the shopping basket (EUR) and shopping visits per week/household, quarters



Source: NielsenIQ Homescan. The weighting method of the panel was changed in 2021. The data is comparable until 2018 and therefore, the data published here should not be compared to time series published earlier.

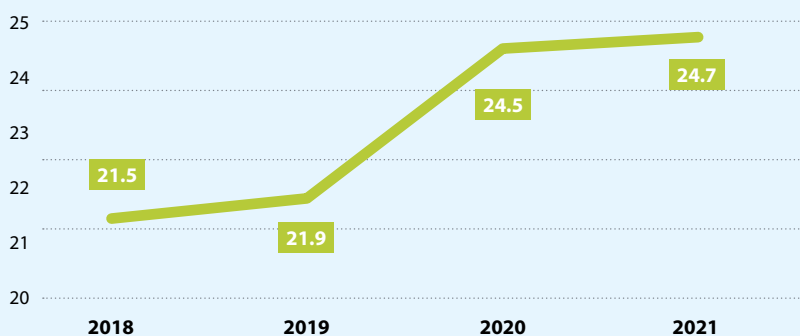
### Value of e-commerce of groceries

Share of total grocery sales



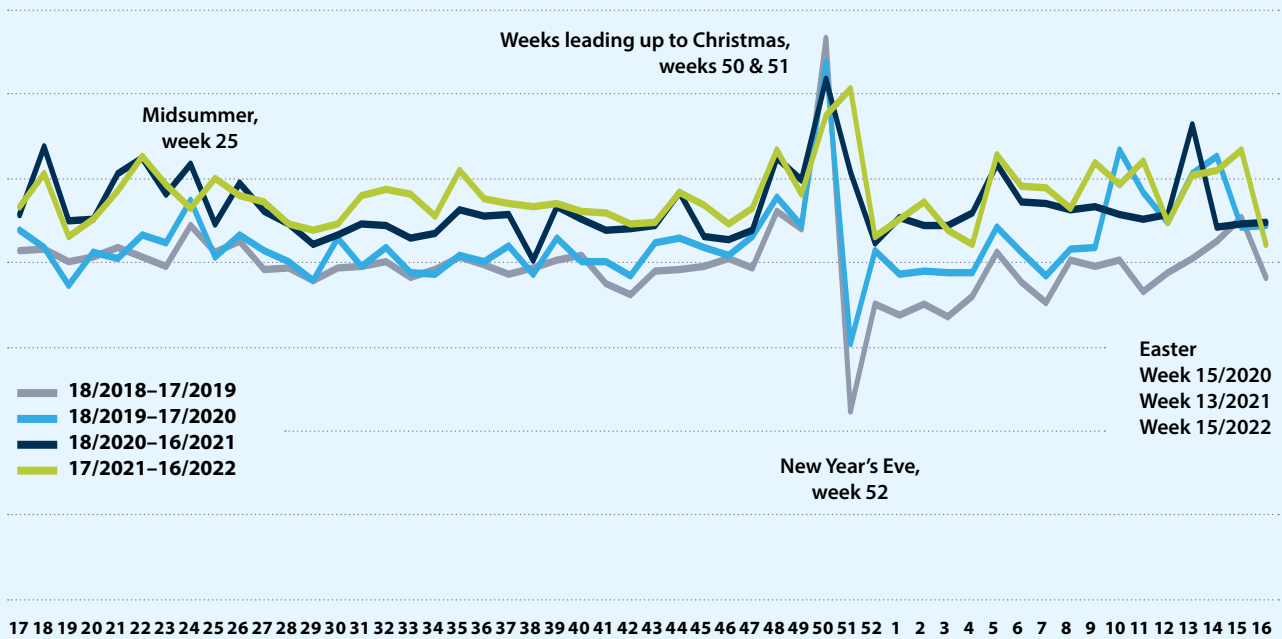
Source: NielsenIQ Grocery Shop Directory

### Shopping basket value (EUR) development 2018–2021



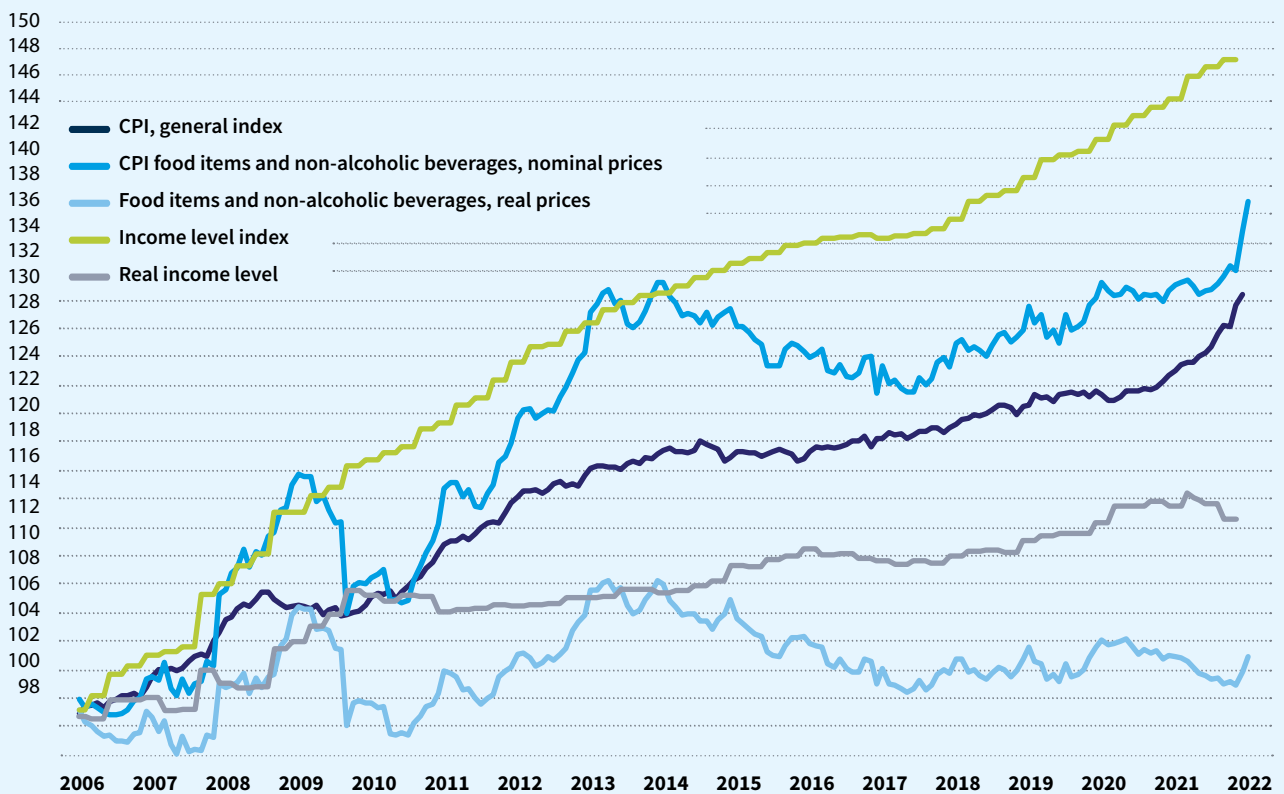
Source: NielsenIQ Homescan. The weighting method of the panel was changed in 2021. The data is comparable until 2018 and therefore, the data published here should not be compared to time series published earlier.

### Weekly trend of groceries purchase costs | week 18/2018–16/2022



Source: NielsenIQ Homescan. The weighting method of the panel was changed in 2021. The data is comparable until 2018 and therefore, the data should not be compared to time series published earlier.

### 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 2016–2021

	2016	2017	2018	2019	2020	2021
Total number markets (excl. specialised markets)	3,002	2,824	2,804	2,789	2,763	2,779
Total number (incl. specialised markets)	4,882	4,624	4,550	4,507	4,461	4,476
Value shift %		1.0%	3.4%	2.5%	8.4%	3.1%
Volume shift %		1.0%	0.3%	0.6%	6.6%	0.7%

Source: NielsenIQ Grocery Shop Directory  
The figures for 2020 and 2021 include online grocery retailers (active in e-commerce only)

## Number of shops by shop type 2021

SHOP TYPE	SALES AREA/DEFINITION	TOTAL 1 JANUARY 2022
Hypermarkets	Citymarket, Prisma and Minimani	158
Department stores	≥ 1,000 m <sup>2</sup> (share of groceries in all sales less than 2/3)	88
Supermarkets, large	≥ 1,000 m <sup>2</sup> (share of groceries in all sales more than 2/3)	712
Supermarkets, small	400–999 m <sup>2</sup>	518
Markets, large	200–399 m <sup>2</sup>	795
Markets, small	100–199 m <sup>2</sup>	277
Small shops	< 100 m <sup>2</sup>	231
Specialist shops / market halls / online grocery retailers (active in e-commerce only)		764
Discount stores, part of grocery trade		382
Service station shops, part of grocery trade		551
<b>Total 1 January 2022</b>		<b>4,476</b>
Mobile shops (buses and boats)		8
Discontinued		172

Source: NielsenIQ Grocery Shop Directory 2021

## Sales of groceries by shop type 2021, EUR million

SHOP TYPE	SALES AREA/DEFINITION	TOTAL 1 JANUARY 2022
Hypermarkets	Citymarket, Prisma and Minimani	6,222
Department stores	≥ 1,000 m <sup>2</sup> (share of groceries in all sales less than 2/3)	412
Supermarkets, large	≥ 1,000 m <sup>2</sup> (share of groceries in all sales more than 2/3)	7,901
Supermarkets, small	400–999 m <sup>2</sup>	2,569
Markets, large	200–399 m <sup>2</sup>	2,183
Markets, small	100–199 m <sup>2</sup>	381
Small shops	< 100 m <sup>2</sup>	168
Specialist shops / market halls / online grocery retailers (active in e-commerce only)		301
Discount stores, part of grocery trade		509
Service station shops, part of grocery trade		148
<b>Total</b>		<b>20,795</b>
Mobile shops (buses and boats)		2
Discontinued		69
<b>Total 1 January 2022</b>		<b>20,866</b>

Source: NielsenIQ Grocery Shop Directory

## Sales of groceries s by chain in 2021

EUR 20,866 million (incl. VAT, incl. discontinued shops), shops total 4,476 (excl. discontinued shops)

Syndicate	Chain	Number of shops	Grocery sales percentage	Grocery sales MEUR	Average sales per shop, MEUR
<b>S Group</b>	Prisma	71	16.6%	3,460	48.7
	S-market	445	21.6%	4,515	10.1
	Alepa + Sale	464	7.1%	1,477	3.2
	Food Market Herkku	3	0.3%	60	20.0
	Other	83	0.5%	106	1.3
<b>S Group total</b>		<b>1,066</b>	<b>* 46.1%</b>	<b>* 9,618</b>	<b>9.0</b>
<b>K Group</b>	K-Citymarket	81	12.6%	2,636	32.5
	K-Supermarket	244	12.3%	2,571	10.5
	K-Market	768	11.1%	2,319	3.0
	Other	137	0.5%	105	0.8
<b>K Group total</b>		<b>1,230</b>	<b>* 36.6%</b>	<b>* 7,631</b>	<b>6.2</b>
<b>Lidl</b>		<b>197</b>	<b>* 9.6%</b>	<b>* 2,006</b>	<b>10.2</b>
<b>Tokmanni</b>		<b>196</b>	<b>3.3%</b>	<b>** 683</b>	<b>3.5</b>
<b>Minimani</b>		<b>6</b>	<b>0.6%</b>	<b>126.7</b>	<b>21.1</b>
<b>M-ketju</b>		<b>58</b>	<b>0.3%</b>	<b>*** 65.7</b>	<b>1.1</b>
<b>Other</b>		<b>1,723</b>	<b>3.5%</b>	<b>736</b>	<b>0.4</b>
<b>TOTAL</b>		<b>*4,476</b>	<b>100%</b>	<b>* 20,866</b>	<b>* 4.7</b>

Syndicate	Chain	Number of shops	Grocery sales MEUR	Average sales per shop, MEUR
<b>R-kioski Oy</b>	<b>R-kioski</b>	<b>462</b>	<b>301</b>	<b>0.6</b>

Number of shops at the end of 2021.

Sources: figures with an asterisk: (\*)NielsenIQ Grocery Shop Directory, other figures: 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's sales includes sales of household goods, source: Finnish Grocery Trade Association

Differences in totals are due to decimal rounding.

## Total sales (EUR million, VAT 0%), number and sales shift of PTY's member company department stores in 2020 and 2021

	Number 2020	Number 2021	Sales 2020	Sales 2021	Sales shift %
<b>S GROUP</b>					
Sokos	20	20	297	313	5.4%
Prisma	70	71	3,577	3,742	4.6%
<b>K GROUP</b>					
K-Citymarket	81	81	2,506	2,613	4.3%
<b>TOKMANNI</b>	192	196	1,073	1,142	6.4%
<b>MINIMANI</b>	6	6	134	146	9.0%
<b>TOTAL</b>	<b>369</b>	<b>374</b>	<b>7,587</b>	<b>7,956</b>	<b>4.9%</b>

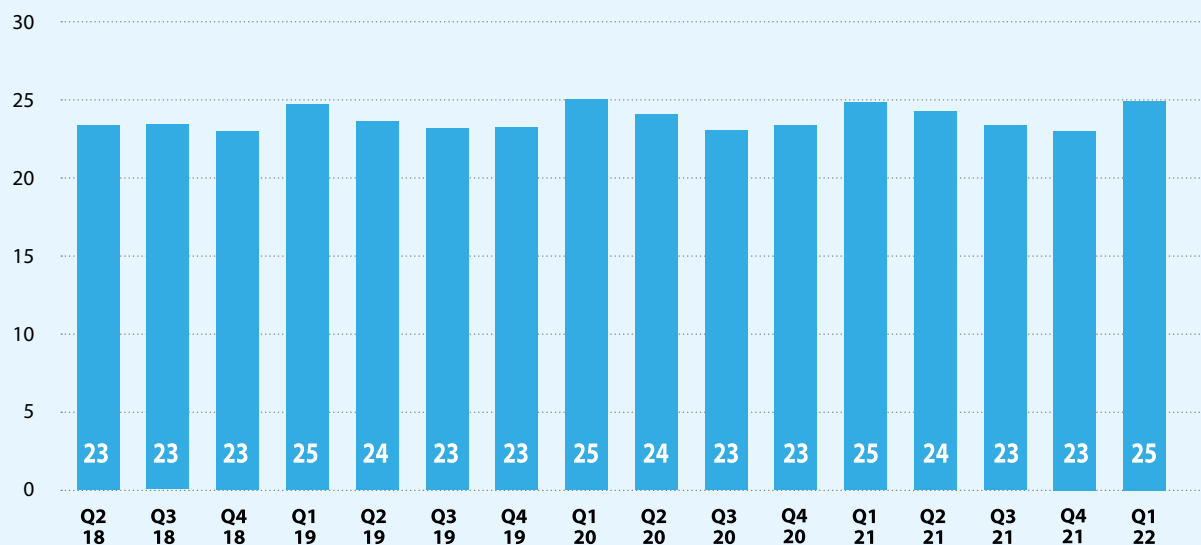
Source: Finnish Grocery Trade Association

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



## Share of private labels in grocery purchases, %

Quarters 2018–2022



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

Source: NielsenIQ Homescan. The weighting method of the panel was changed in 2021. The data is comparable until 2018 and therefore, the data should not be compared to time series published earlier.

## Village shops 2021, excl. those discontinued

REGION	NUMBER	GROCERY SALES, MEUR	% OF VILLAGE SHOPS' GROCERY SALES
1 Uusimaa	14	6.0	6.4%
2 Southwest Finland	22	8.1	8.6%
4 Satakunta	7	1.1	1.2%
5 Kanta-Häme	4	0.9	1.0%
6 Pirkanmaa	12	6.5	6.9%
7 Päijät-Häme	6	3.2	3.4%
8 Kymenlaakso	6	3.0	3.1%
9 South Karelia	5	1.5	1.6%
10 South Savo	7	4.6	4.8%
11 North Savo	11	6.5	6.9%
12 North Karelia	8	3.4	3.6%
13 Central Finland	3	0.8	0.9%
14 South Ostrobothnia	10	3.2	3.4%
15 Ostrobothnia	15	7.7	8.2%
16 Central Ostrobothnia	5	5.7	6.1%
17 North Ostrobothnia	15	8.1	8.6%
18 Kainuu	8	1.5	1.6%
19 Lapland	19	12.5	13.2%
20 Åland	14	9.9	10.5%
<b>Total</b>	<b>191</b>	<b>94.1</b>	<b>100%</b>

Source: NielsenIQ Grocery Shop Directory 2021

## MEMBERS OF THE FINNISH GROCERY TRADE ASSOCIATION



**SOK Corporation**  
s-ryhma.fi



**Kesko**  
kesko.fi



**Lidl Finland Ky**  
lidl.fi

**TOKMANNI**

**Tokmanni Group Oyj**  
tokmanni.fi



**R-kioski Oy**  
r-kioski.fi

**minimani**

**Minimani Yhtiöt Oy**  
minimani.fi



**M Itsenäiset Kauppiat Oy**  
m-ketju.fi



**Kauppahalli24.fi**

**Seulo Palvelut Oy**  
kauppahalli24.fi

**KESPRO**

**Kespro**  
kespro.com

**MEIRANOVA**

**Meira Nova Oy**  
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**Aimo**<sup>VALIO</sup>

**Valio Oy / Valio Aimo®**  
valio.fi/ammattilaiset



**Suomen Palvelutukkurit Oy**  
palvelutukkurit.fi

**K KAUPPIASLIITTO**

**The K-Retailers' Association**  
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Finnish Grocery Trade Association



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