



# FINNISH GROCERY TRADE

**2023**

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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 2023

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 – Senior Advisor, LL.M. **Merja Söderström**

Supply chain development, environmental issues – Director **Ilkka Nieminen**

Administration and finances – Administrative Assistant **Terhi Karunka**

Retail and distribution pool – Emergency Preparedness Manager **Erica Sauvala** (as of 7 August)

Legislation, foodservice wholesale trade – 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

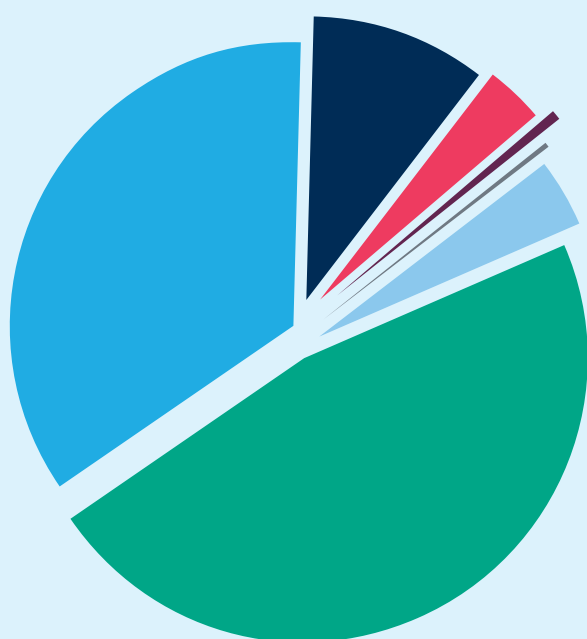
Finnish Grocery Trade Association

#### LAYOUT

Tiina Aaltonen, Gra & Grappo

# KEY FIGURES 2022

## Market shares of the Finnish grocery trade groups in 2022 EUR 21,636 million



	MARKET SHARE, %	GROCERY SALES, MEUR
<span style="color: green;">●</span> S GROUP	47.0	10,163
<span style="color: blue;">●</span> K GROUP	35.2	7,613
<span style="color: darkblue;">●</span> LIDL	9.8	2,123
<span style="color: red;">●</span> TOKMANNI*	3.3	712
<span style="color: purple;">●</span> MINIMANI*	0.6	130
<span style="color: grey;">●</span> M-KETJU*	0.3	65.6**
<span style="color: lightblue;">●</span> OTHER PRIVATE*	3.8	829

Grocery sales incl. VAT

Source: NielsenIQ Grocery Shop Directory

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

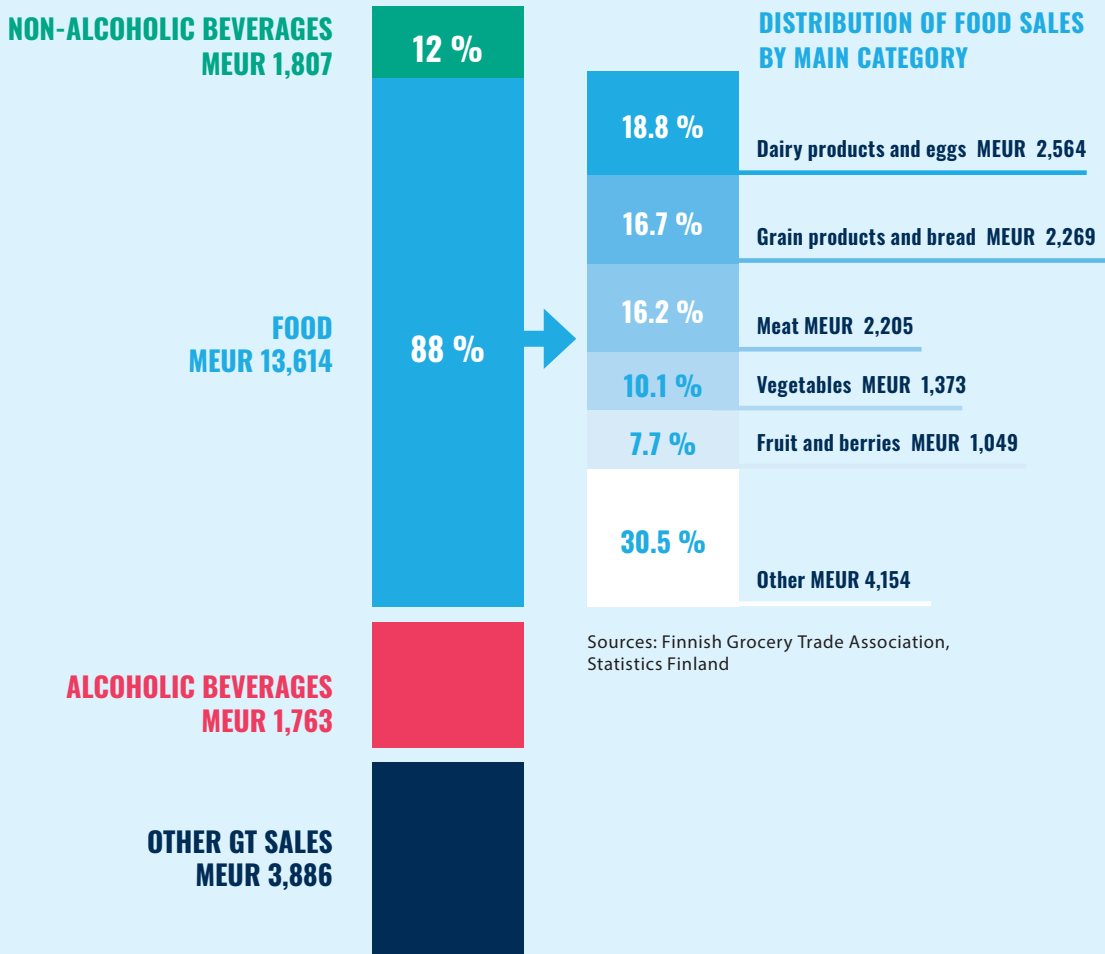
\*\* M-ketju's sales includes sales of household goods, source: Finnish Grocery Trade Association

## Grocery Retail Sales 2022 • MEUR 21,636

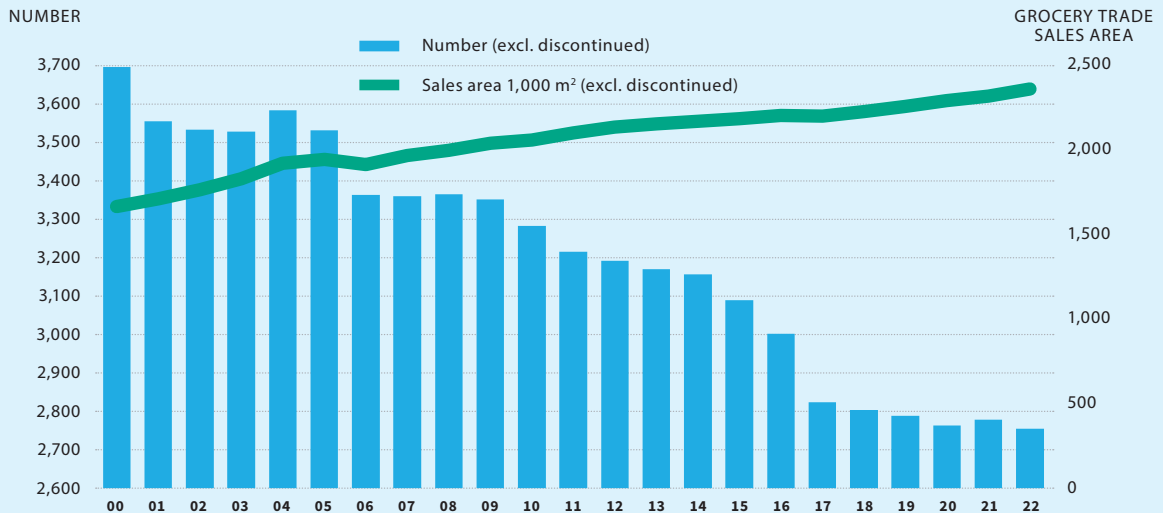
Sales value development	3.7 %
Sales volume development	-5.2 %
Sales per resident	3,900 €
Grocery retail sales EUR per household (number of households in 2021*)	7,489 €
Number of shops (markets)	2,755
Plus specialised grocery shops / market halls / direct sale halls / online grocery retailers (active in e-commerce only)	745
and discount stores and service station shops (part of grocery trade)	927
Grocery sales area in grocery shops (excl. specialised markets)	2.4 million m <sup>2</sup>
Average sales per square metre	EUR 8,000 per m <sup>2</sup>
Residents per grocery shop	1,253

Sources: NielsenIQ Grocery Shop Directory, \*Statistics Finland

## Retail sales of food and non-alcoholic beverages in 2022 EUR 15,421 million



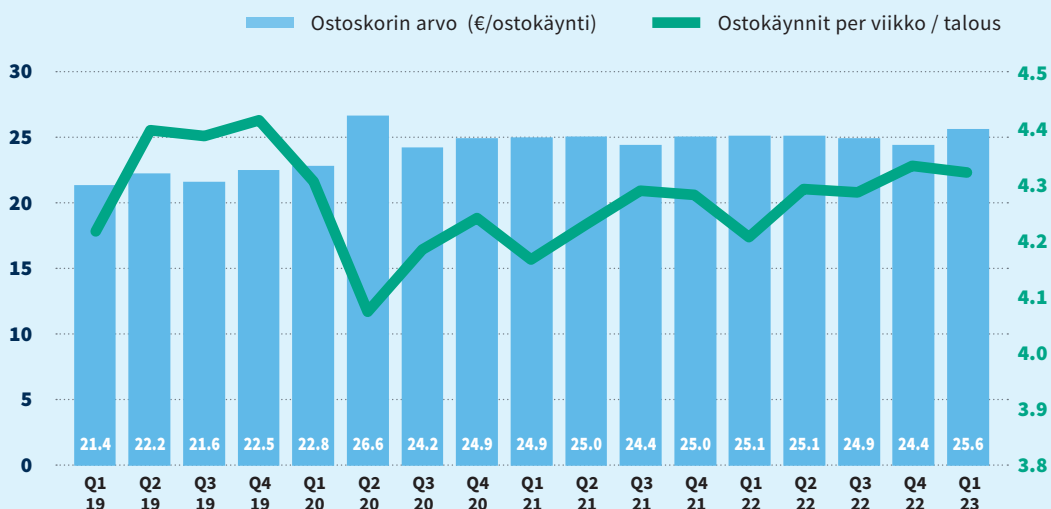
## Grocery trade shops, number and sales area (excl. specialised markets)



Source: NielsenIQ Grocery Shop Directory

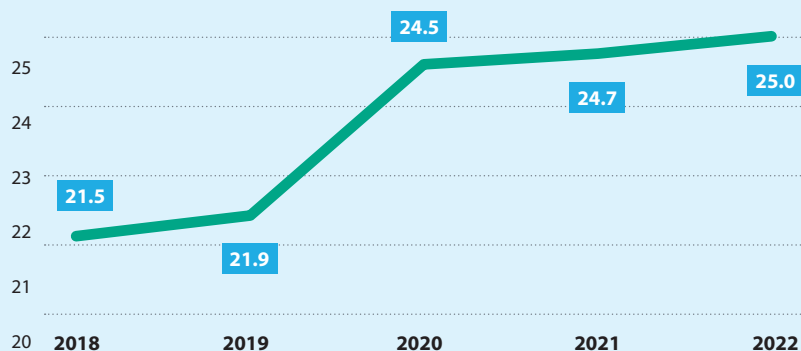
### Groceries purchase costs

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



Source: NielsenIQ Homescan

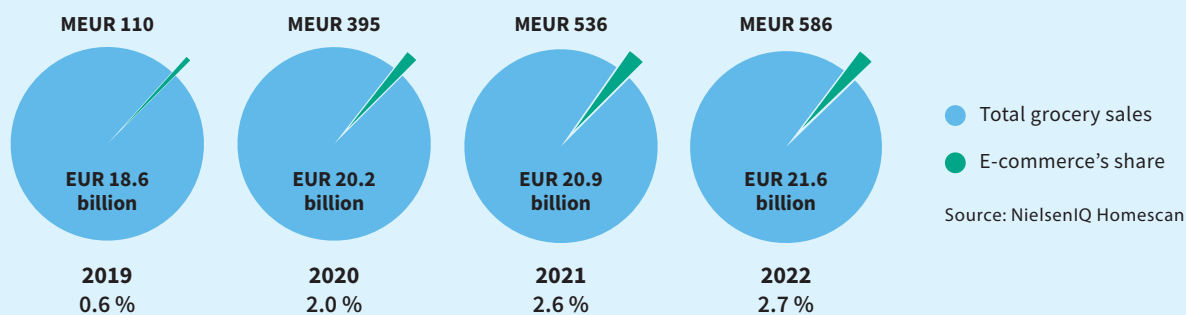
### Shopping basket value (EUR) development 2018–2022



Source: NielsenIQ Homescan

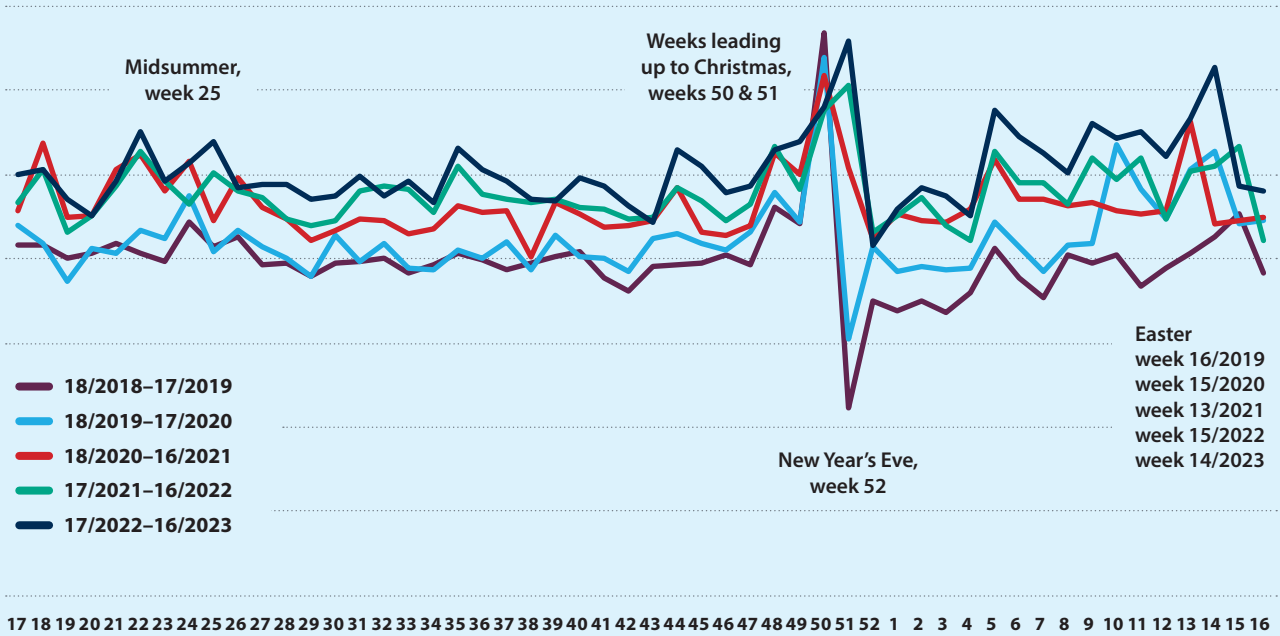
### Value of e-commerce of groceries

Share of total grocery sales



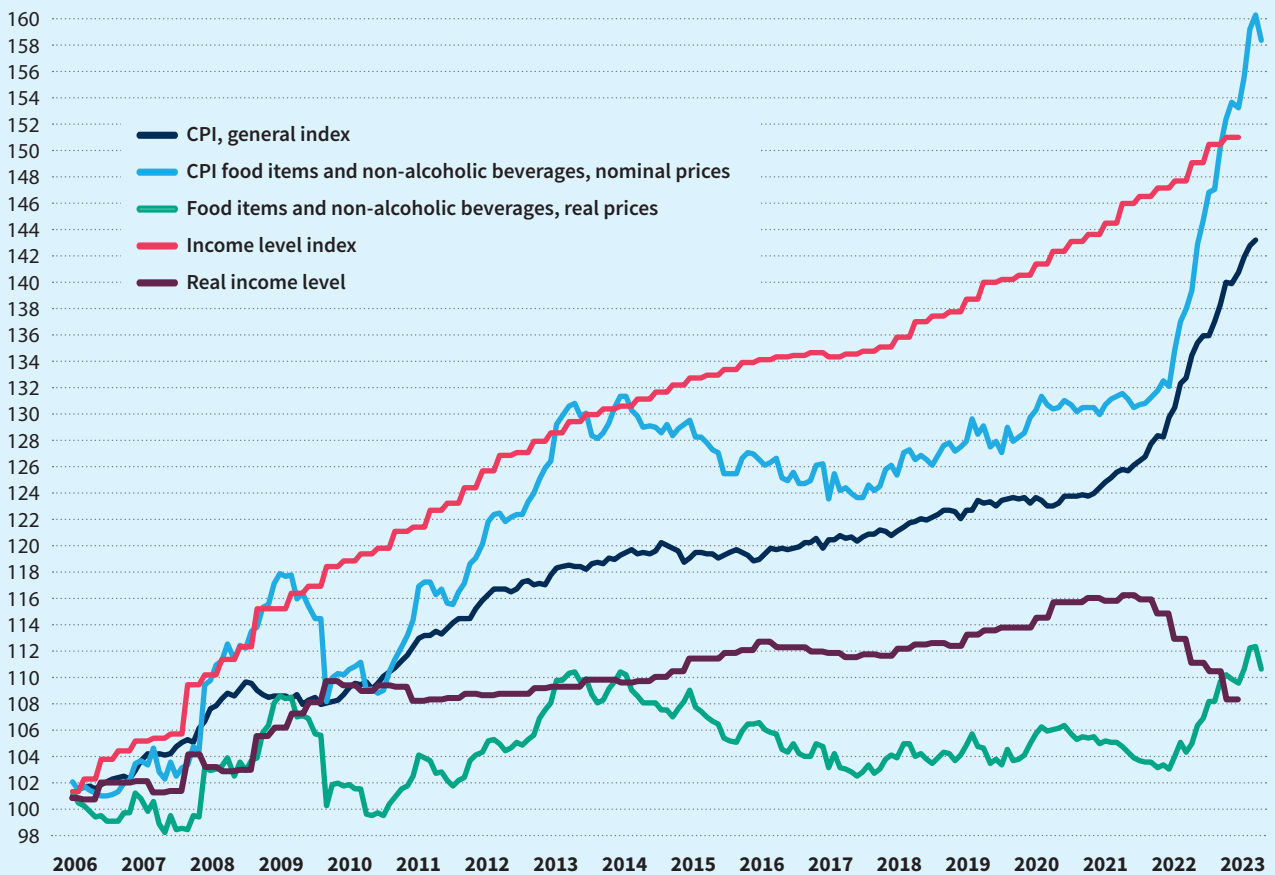
Source: NielsenIQ Homescan

### Weekly trend of groceries purchase costs | week 18/2018–16/2023



Source: NielsenIQ Homescan

### 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 2017–2022

	2017	2018	2019	2020	2021	2022
Total number markets (excl. specialised markets)	2,824	2,804	2,789	2,763	2,779	2,755
Total number (incl. specialised markets)	4,624	4,550	4,507	4,461	4,476	4,427
Value shift %	1.0 %	3.4 %	2.5 %	8.4 %	3.1 %	3.7 %
Volume shift %	1.0 %	0.3 %	0.6 %	6.6 %	0.7 %	-5.2 %

Source: NielsenIQ Grocery Shop Directory

The figures for 2020, 2021 and 2022 include online grocery retailers (active in e-commerce only)

Number of market stores in 2000–2002; see page 4.

## Number of shops by shop type 2022

SHOP TYPE	SALES AREA/DEFINITION	TOTAL 1 JANUARY 2023
Hypermarkets	Citymarket, Prisma and Minimani	162
Department stores	≥ 1,000 m <sup>2</sup> (share of groceries in all sales less than 2/3)	89
Supermarkets, large	≥ 1,000 m <sup>2</sup> (share of groceries in all sales more than 2/3)	725
Supermarkets, small	400–999 m <sup>2</sup>	527
Markets, large	200–399 m <sup>2</sup>	779
Markets, small	100–199 m <sup>2</sup>	269
Small shops	< 100 m <sup>2</sup>	204
Specialist shops / market halls / online grocery retailers (active in e-commerce only)		745
Discount stores, part of grocery trade		421
Service station shops, part of grocery trade		506
<b>Total 1 January 2023</b>		<b>4,427</b>
Mobile shops (buses and boats)		5
Discontinued		227

Source: NielsenIQ Grocery Shop Directory

## Sales of groceries by shop type 2022, EUR million

SHOP TYPE	SALES AREA/DEFINITION	TOTAL 1 JANUARY 2023
Hypermarkets	Citymarket, Prisma and Minimani	6,469
Department stores	≥ 1,000 m <sup>2</sup> (share of groceries in all sales less than 2/3)	431
Supermarkets, large	≥ 1,000 m <sup>2</sup> (share of groceries in all sales more than 2/3)	8,279
Supermarkets, small	400–999 m <sup>2</sup>	2,631
Markets, large	200–399 m <sup>2</sup>	2,145
Markets, small	100–199 m <sup>2</sup>	377
Small shops	< 100 m <sup>2</sup>	153
Specialist shops / market halls / online grocery retailers (active in e-commerce only)		345
Discount stores, part of grocery trade		568
Service station shops, part of grocery trade		135
<b>Total</b>		<b>21,533</b>
Mobile shops (buses and boats)		2
Discontinued		101
<b>Total 1 January 2023</b>		<b>21,636</b>

Source: NielsenIQ Grocery Shop Directory

## Sales of groceries by chain in 2022

EUR 21,636 million (incl. VAT, incl. discontinued shops), shops total 4,427 (excl. discontinued shops)

Syndicate	Chain	Number of shops	Grocery sales percentage	Grocery sales MEUR	Average sales per shop, MEUR
<b>S Group</b>	Prisma	74	17.2 %	3,724	50.3
	S-market	452	22.2 %	4,800	10.6
	Alepa + Sale	457	6.8 %	1,468	3.2
	Food Market Herkku	3	0.3 %	56	18.7
	other	87	0.5 %	114	1.3
<b>S Group total</b>		<b>1,073</b>	<b>* 47.0 %</b>	<b>* 10,163</b>	<b>9.5</b>
<b>K Group</b>	K-Citymarket	81	12.1 %	2,615	32.3
	K-Supermarket	248	12.0 %	2,591	10.4
	K-Market	756	10.7 %	2,310	3.1
	Other	130	0.5 %	97	0.7
<b>K Group total</b>		<b>1,215</b>	<b>* 35.2%</b>	<b>* 7,613</b>	<b>6.3</b>
<b>Lidl</b>		<b>200</b>	<b>* 9.8%</b>	<b>* 2,123</b>	<b>10.6</b>
<b>Tokmanni</b>	Tokmanni store	198	-	-	-
	Miny store	4	-	-	-
	<b>Tokmanni total</b>	<b>202</b>	<b>3.3 %</b>	<b>712</b>	<b>3.5</b>
<b>Minimani</b>		<b>7</b>	<b>0.6 %</b>	<b>** 130.2</b>	<b>18.6</b>
<b>M-ketju</b>		<b>55</b>	<b>0.3 %</b>	<b>*** 65.6</b>	<b>1.2</b>
<b>Other</b>		<b>1,675</b>	<b>3.8 %</b>	<b>829</b>	<b>0.5</b>
<b>TOTAL</b>		<b>* 4,427</b>	<b>100 %</b>	<b>* 21,636</b>	<b>* 4.9</b>

Syndicate	Chain	Number of shops	Grocery sales percentage	Average sales per shop, MEUR
<b>R-kioski Oy</b>	<b>R-kioski</b>	<b>451</b>	<b>295</b>	<b>0.6</b>

Number of shops at the end of 2022.

Sources: figures with an asterisk: NielsenIQ Grocery Shop Directory, other figures: Finnish Grocery Trade Association

\*\* Minimani store in Lieliahti, Tampere included in figures as of November 2022

\*\*\* 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 2021 and 2022

	Number 2021	Number 2022	Sales 2021	Sales 2022	Sales shift, %
<b>S GROUP</b>					
Sokos	20	20	342.3	367.7	7.4 %
Prisma	71	74	3,736.8	3,966.5	6.1 %
<b>K GROUP</b>					
K-Citymarket	81	81	2,613.2	2,584.5	-1.1 %
<b>TOKMANNI</b>	196	* 202	1,141.8	* 1,168.0	2.3 %
<b>MINIMANI</b>	6	7	146.4	** 147.5	0.7 %
<b>TOTAL</b>	<b>374</b>	<b>384</b>	<b>7 980,5</b>	<b>8,234.2</b>	<b>3.2 %</b>

Source: Finnish Grocery Trade Association

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

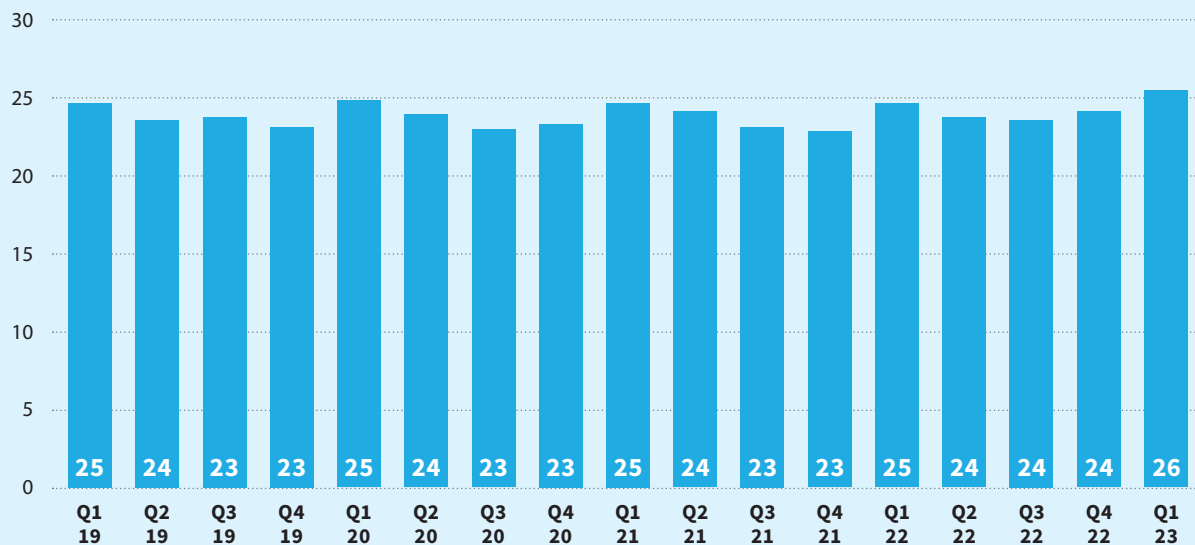
\* Includes 198 Tokmanni stores and 4 Miny stores

\*\* Minimani store in Lieliahti, Tampere included in figures as of November 2022



## Share of private labels in grocery purchases, %

Quarters 2019–2023



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

Source: NielsenIQ Homescan.

## Village shops 2022, excl. those discontinued

REGION	NUMBER	GROCERY SALES, MEUR	% OF VILLAGE SHOPS' GROCERY SALES
Uusimaa	11	4.9	5.4 %
Southwest Finland	20	8.2	9.1 %
Satakunta	6	0.8	0.9 %
Kanta-Häme	3	0.7	0.7 %
Pirkanmaa	10	5.8	6.4 %
Päijät-Häme	5	2.9	3.2 %
Kymenlaakso	6	2.9	3.2 %
South Karelia	5	1.6	1.7 %
South Savo	8	4.1	4.6 %
North Savo	11	6.4	7.0 %
North Karelia	7	3.3	3.7 %
Central Finland	3	0.9	1.0 %
South Ostrobothnia	10	3.2	3.5 %
Ostrobothnia	14	8.0	8.8 %
Central Ostrobothnia	5	5.8	6.4 %
North Ostrobothnia	15	9.8	10.8 %
Kainuu	6	1.3	1.4 %
Lapland	18	10.5	11.5 %
Åland	14	9.8	10.8 %
<b>Yhteensä</b>	<b>177</b>	<b>90.8</b>	<b>100 %</b>

Source: NielsenIQ Grocery Shop Directory

## 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



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**K KAUPPIASLIITTO**

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Finnish Grocery Trade Association



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