



FINNISH GROCERY TRADE 2024

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Finnish Grocery Trade Association

The Finnish Grocery Trade Association (PTY) represents the interests of the grocery trade and wholesale grocery trade in the policy-making process. The aim is for the grocery sector to operate in an environment of free competition and to be known as a responsible sector and operator that takes the interests of consumers into account.

The trade sector is a significant employer and investor in Finland and it is important to pay attention to its perspectives in decision-making processes. The Finnish Grocery Trade Association co-operates actively with the Finnish Commerce Federation.

In addition to industry advocacy, the Finnish Grocery Trade Association develops industry-wide, non-competitive operating models that promote efficiency, social responsibility and cooperation throughout the value chain.

Organisation

Board of Directors

Working Groups 2024

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 **Tuula Loikkanen**

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**

Legislation, foodservice wholesale trade – Legal Counsel, LL.M. **Tea Taivalkoski**

Food safety, self-monitoring – Food Specialist **Anna Salminen**

Chemical policy, product safety affairs, commerce safety – Senior Advisor **Terhi Kuljukka-Rabb**

Support services – Assistant **Heidi Nylund**

Communications, statistics – Communications Manager **Mari Mattila**

TEXTS Finnish Grocery Trade Association

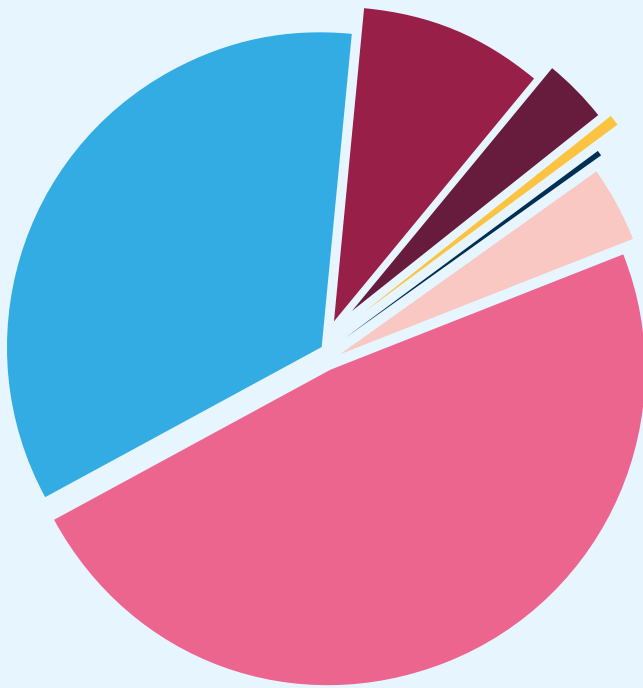
TRANSLATION Delingua Language Services

PHOTOS Finnish Grocery Trade Association

LAYOUT Tiina Aaltonen, Grappo

KEY FIGURES 2023

Market shares of the Finnish grocery trade groups in 2023 EUR 22,930 million



| | MARKET SHARE, % | GROCERY SALES. MEUR |
|---|-----------------|---------------------|
| ● S GROUP | 48.3 | 11,067 |
| ● K GROUP | 34.3 | 7,862 |
| ● LIDL | 9.6 | 2,205 |
| ● TOKMANNI* | 3.2 | 739 |
| ● MINIMANI* | 0.6 | 139 |
| ● M-KETJU* | 0.3 | 60** |
| ● OTHER PRIVATE* | 3.7 | 858 |

Grocery sales incl. VAT

Sources: NielsenIQ Grocery Shop Directory,
*Finnish Grocery Trade Association

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

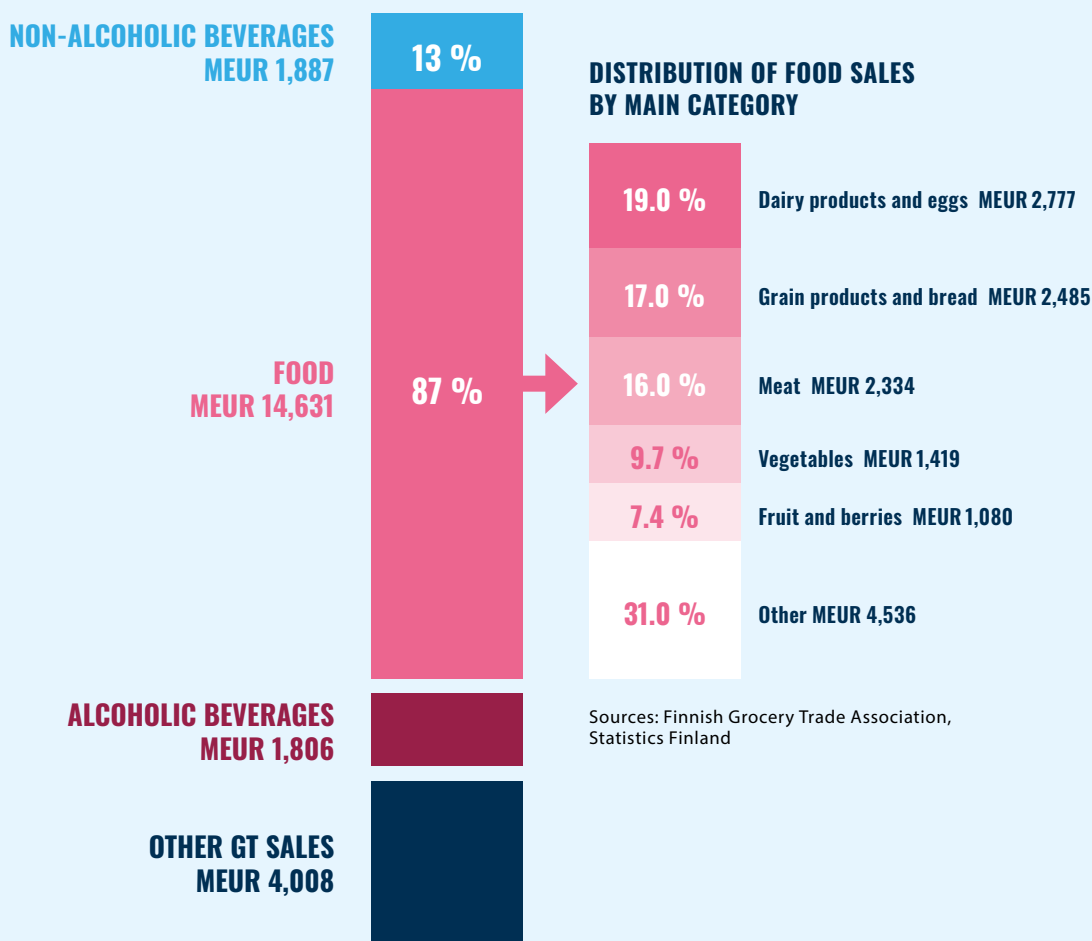
Grocery Retail Sales 2023 • MEUR 22,930

| | |
|--|------------------------------|
| Sales value development | 6.0% |
| Sales volume development | -1.1% |
| Sales per resident | EUR 4,100 |
| Grocery retail sales EUR per household (number of households in 2022*) | EUR 7,855 |
| Number of shops (markets) | 2,734 |
| Plus specialised grocery shops / market halls / direct sale halls / online grocery retailers (active in e-commerce only) | 734 |
| and discount stores and service station shops (part of grocery trade) | 938 |
| Grocery sales area in grocery shops (excl. specialised markets) | 2.4 million m ² |
| Average sales per square metre | EUR 8,400 per m ² |
| Residents per grocery shop | 1,263 |

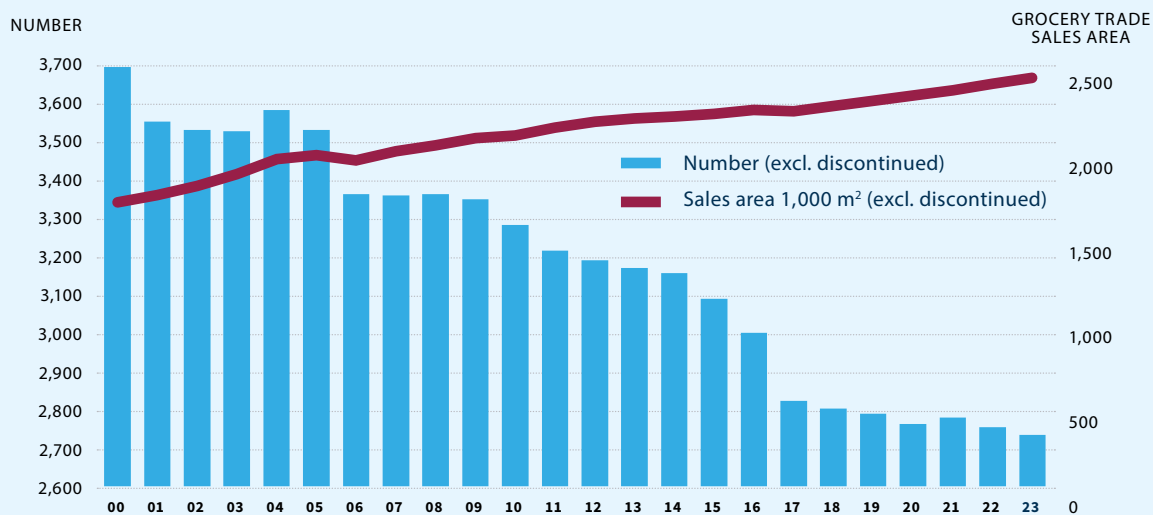
Sources: NielsenIQ Grocery Shop Directory, *Statistics Finland

Retail sales of food and non-alcoholic beverages in 2023

EUR 16,517 million



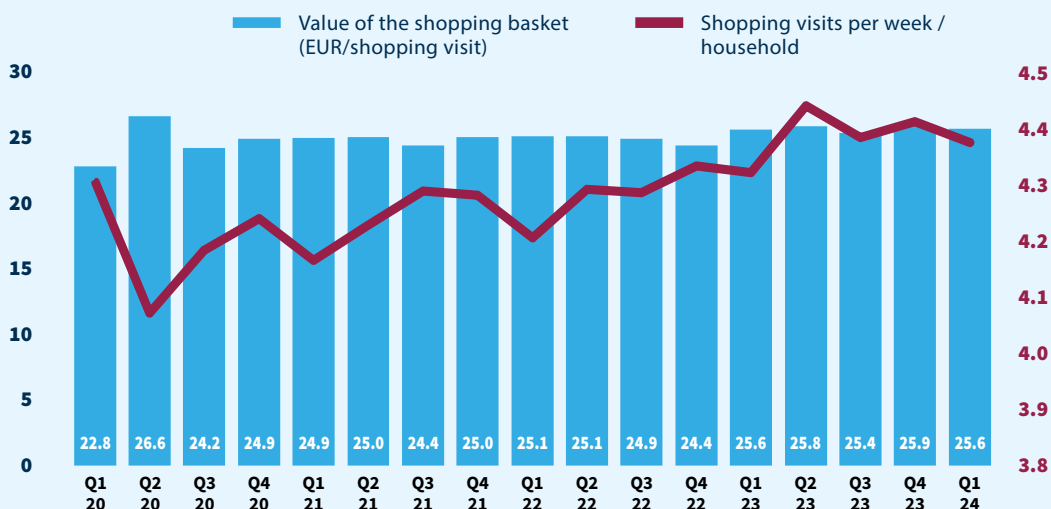
Grocery trade shops, number and sales area (excl. specialised markets)



Source: NielsenIQ Grocery Shop Directory

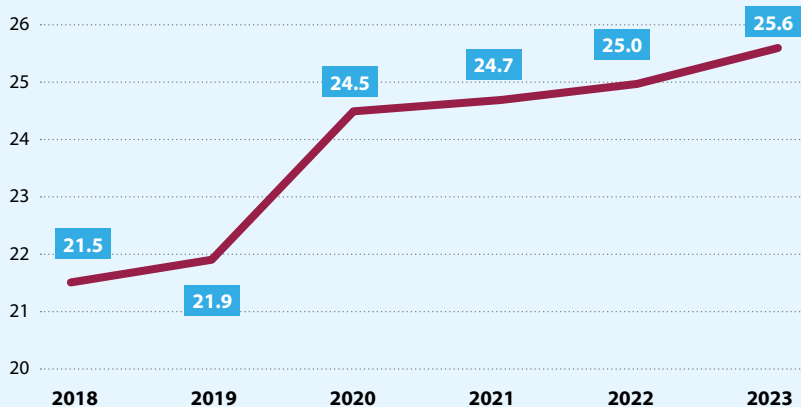
Groceries purchase costs

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



Source: NielsenIQ Homescan

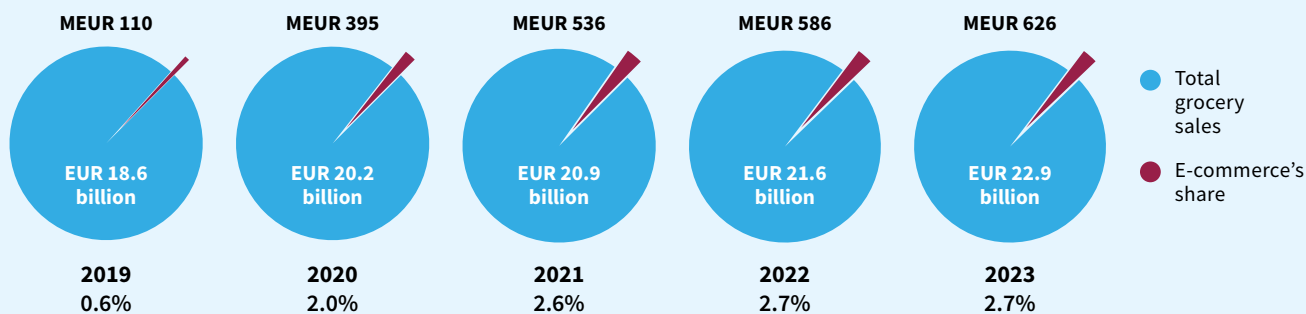
Shopping basket value (EUR) development 2018–2023



Source: NielsenIQ Homescan

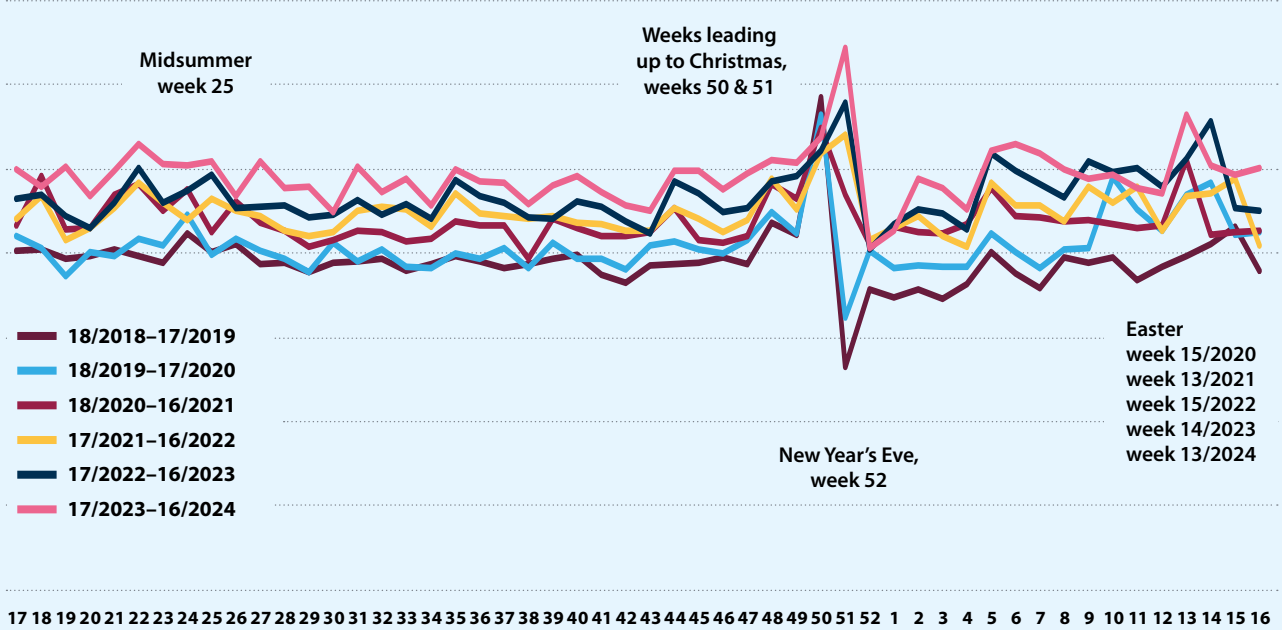
Value of e-commerce of groceries

Share of total grocery sales



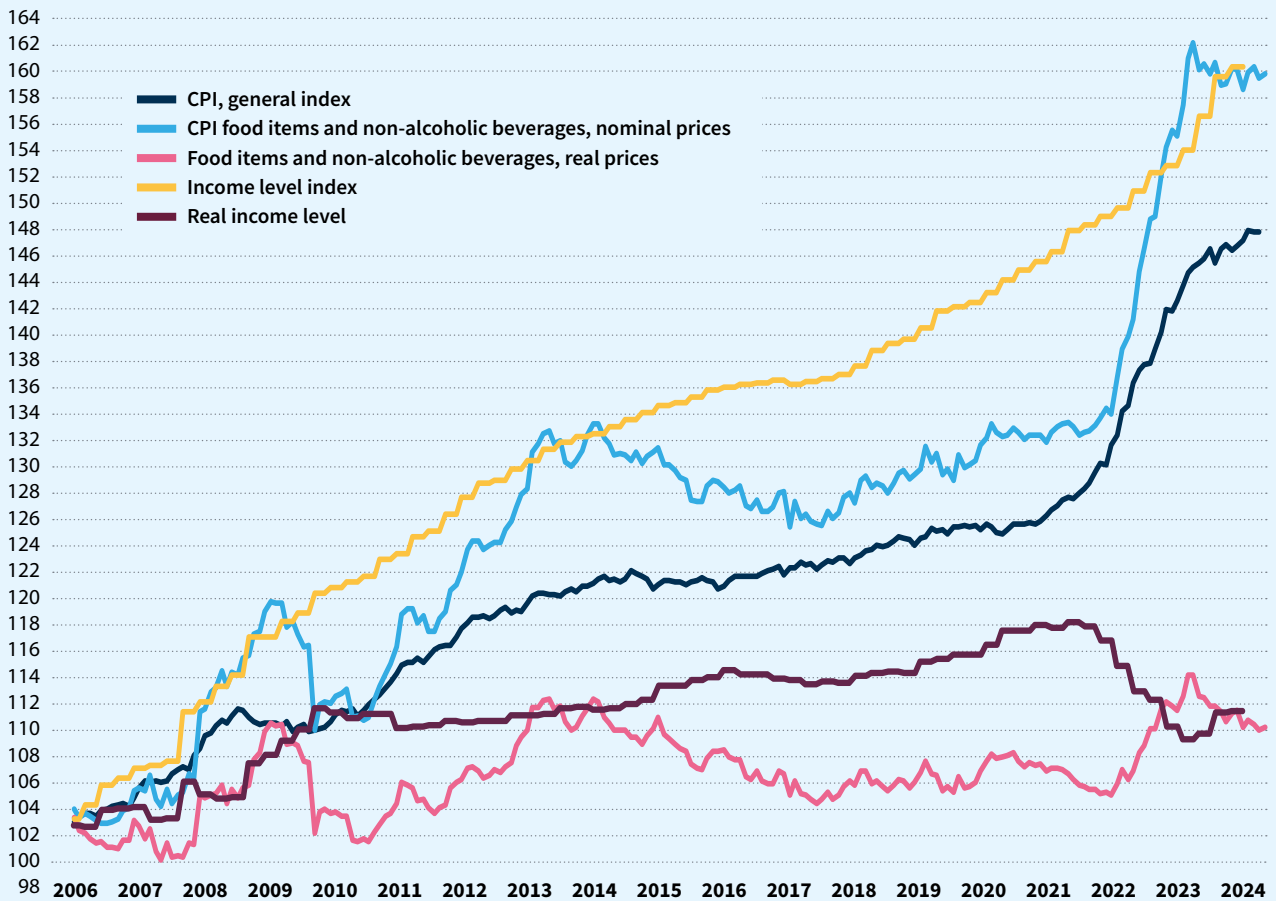
Source: NielsenIQ Homescan

Weekly trend of groceries purchase costs | week 18/2018-16/2024



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 2018–2023

| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|--|-------|-------|-------|-------|-------|-------|
| Total number markets (excl. specialised markets) | 2,804 | 2,789 | 2,763 | 2,779 | 2,755 | 2,734 |
| Total number (incl. specialised markets) | 4,550 | 4,507 | 4,461 | 4,476 | 4,427 | 4,406 |
| Value shift % | 3.4% | 2.5% | 8.4% | 3.1% | 3.7% | 6.0% |
| Volume shift % | 0.3% | 0.6% | 6.6% | 0.7% | -5.2% | -1.1% |

Source: NielsenIQ Grocery Shop Directory

The figures for 2020–2023 include online grocery retailers (active in e-commerce only).

Number of market stores in 2000–2023; see page 4.

Number of shops by shop type 2023

| SHOP TYPE | SALES AREA/DEFINITION | TOTAL 1 JANUARY 2024 |
|---|--|-------------------------|
| Hypermarkets | Citymarket, Prisma and Minimani | 164 |
| Department stores | ≥ 1,000 m ² (share of groceries in all sales less than 2/3) | 91 |
| Supermarkets, large | ≥ 1,000 m ² (share of groceries in all sales more than 2/3) | 735 |
| Supermarkets, small | 400–999 m ² | 543 |
| Markets, large | 200–399 m ² | 756 |
| Markets, small | 100–199 m ² | 256 |
| Small shops | < 100 m ² | 189 |
| Specialist shops / market halls / online grocery retailers (active in e-commerce only) | | 734 |
| Discount stores, part of grocery trade | | 460 |
| Service station shops, part of grocery trade | | 478 |
| Total 1 January 2024 | | 4,406 |
| Mobile shops (buses and boats) | | 4 |
| Discontinued | | 187 |

Source: NielsenIQ Grocery Shop Directory

Sales of groceries by shop type 2023, EUR million

| SHOP TYPE | SALES AREA/DEFINITION | TOTAL 1 JANUARY 2024 |
|---|--|-------------------------|
| Hypermarkets | Citymarket, Prisma and Minimani | 7,012 |
| Department stores | ≥ 1,000 m ² (share of groceries in all sales less than 2/3) | 436 |
| Supermarkets, large | ≥ 1,000 m ² (share of groceries in all sales more than 2/3) | 8,858 |
| Supermarkets, small | 400–999 m ² | 2,758 |
| Markets, large | 200–399 m ² | 2,136 |
| Markets, small | 100–199 m ² | 369 |
| Small shops | < 100 m ² | 143 |
| Specialist shops / market halls / online grocery retailers (active in e-commerce only) | | 321 |
| Discount stores, part of grocery trade | | 633 |
| Service station shops, part of grocery trade | | 129 |
| Total | | 22,796 |
| Mobile shops (buses and boats) | | 1 |
| Discontinued | | 133 |
| Yhteensä 1.1.2024 | | 22,930 |

Source: NielsenIQ Grocery Shop Directory

Sales of groceries by chain in 2023

EUR 22,930 million (incl. VAT, incl. discontinued shops), shops total 4,406 (excl. discontinued shops)

| Syndicate | Chain | Number of shops | Grocery sales percentage | Grocery sales MEUR | Average sales per shop, MEUR |
|--------------------|-----------------------|-----------------|--------------------------|------------------------------|------------------------------|
| S Group | Prisma | 76 | 18.1% | 4,160 | 54.7 |
| | S-market** | 456 | 23.0% | 5,263 | 11.5 |
| | Alepa + Sale | 458 | 6.7% | 1,530 | 3.3 |
| | Other | 84 | 0.5% | 115 | 1.4 |
| | S Group total | 1,074 | * 48.3% | * 11,067 | 10.3 |
| K Group | K-Citymarket | 81 | 11.8% | 2,714 | 33.5 |
| | K-Supermarket | 251 | 11.8% | 2,710 | 10.8 |
| | K-Market | 748 | 10.2% | 2,343 | 3.1 |
| | Other | 125 | 0.4% | 95 | 0.8 |
| | K-ryhmä total | 1,205 | * 34.3% | * 7,862 | 6.5 |
| Lidl | | 202 | * 9.6% | * 2,205 | 10.9 |
| Tokmanni | Tokmanni store | 201 | - | - | - |
| | Miny store | 6 | - | - | - |
| | Tokmanni total | 207 | 3.2% | 739 | 3.6 |
| Minimani | | 7 | 0.6% | 139 | 19.8 |
| M-ketju | | 53 | 0.3% | *** 59.6 | 1.1 |
| Other | | 1,658 | 3.7% | 858 | 0.5 |
| TOTAL | | * 4,406 | 100% | * 22,930 | * 5.2 |
| Syndicate | Chain | Number of shops | Grocery sales percentage | Average sales per shop, MEUR | |
| R-kioski Oy | R-kioskit | 379 | 299 | 0.7 | |

Number of shops at the end of 2023

Sources: Figures with *: NielsenIQ Grocery Shop Directory, other figures: Finnish Grocery Trade Association

** includes Food Market Herkku

*** 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 2022 and 2023

| | Number 2022 | Number 2023 | Sales 2022 | Sales 2023 | Sales shift, % |
|-------------------|-------------|-------------|----------------|----------------|----------------|
| S GROUP | | | | | |
| Sokos | 20 | 20 | 367.7 | 396.2 | 7.7% |
| Prisma | 74 | 76 | 3,968.3 | 4,342.4 | 9.4% |
| K GROUP | | | | | |
| K-Citymarket | 81 | 81 | 2,584.5 | 2,673.2 | 3.4% |
| TOKMANNI* | 202 | 207 | 1,168.0 | 1,208.6 | 3.5% |
| MINIMANI** | 7 | 7 | 147.5 | 154.3 | 4.6% |
| TOTAL | 384 | 391 | 8 236.0 | 8 774.7 | 6.5% |

Number of shops at the end of 2023. E-commerce included in the statistics if the company has an online store.

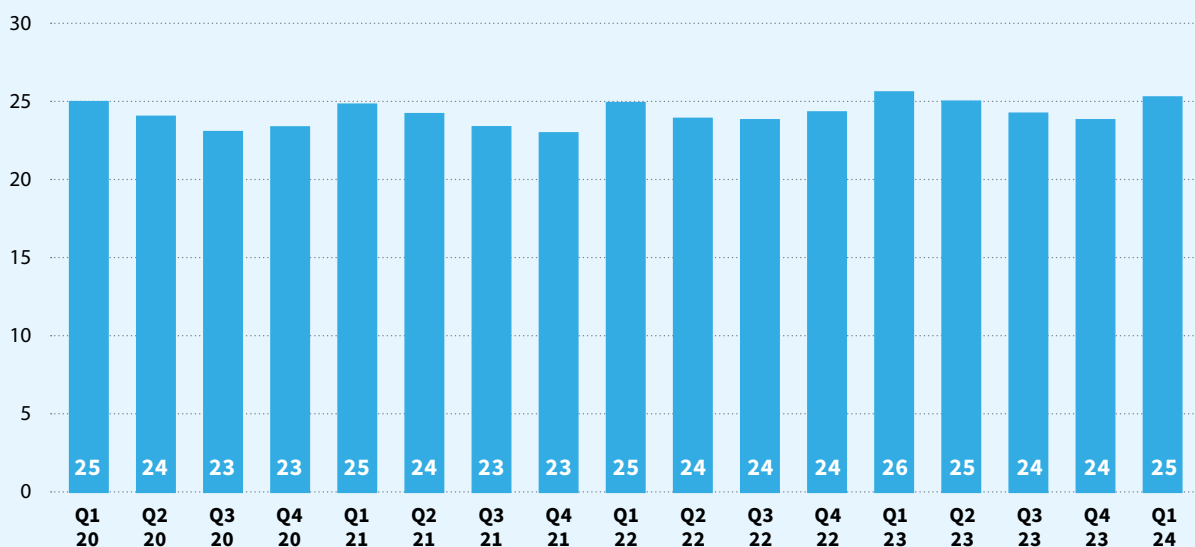
Source: Finnish Grocery Trade Association

* 2022: Includes 198 Tokmanni stores and 4 Miny stores. 2023: Includes 201 Tokmanni stores and 6 Miny stores.

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

Share of private labels in grocery purchases, %

Quarters 2020–2024



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

Source: NielsenIQ Homescan

Village shops 2023, excl. those discontinued

| REGION | NUMBER | GROCERY SALES, MEUR | % OF VILLAGE SHOPS' GROCERY SALES |
|----------------------|------------|---------------------|-----------------------------------|
| Uusimaa | 11 | 4.5 | 5.3% |
| Southwest Finland | 19 | 8.8 | 10.4% |
| Satakunta | 4 | 0.5 | 0.6% |
| Kanta-Häme | 2 | 0.3 | 0.3% |
| Pirkanmaa | 9 | 3.2 | 3.8% |
| Päijät-Häme | 5 | 2.7 | 3.2% |
| Kymenlaakso | 6 | 3.0 | 3.5% |
| South Karelia | 4 | 1.6 | 1.8% |
| South Savo | 7 | 4.1 | 4.9% |
| North Savo | 10 | 4.5 | 5.3% |
| North Karelia | 6 | 2.9 | 3.4% |
| Central Finland | 4 | 0.9 | 1.1% |
| South Ostrobothnia | 7 | 2.3 | 2.6% |
| Ostrobothnia | 13 | 8.1 | 9.6% |
| Central Ostrobothnia | 5 | 6.1 | 7.1% |
| North Ostrobothnia | 15 | 10.1 | 11.8% |
| Kainuu | 6 | 1.2 | 1.4% |
| Lapland | 17 | 10.4 | 12.3% |
| Åland | 14 | 9.9 | 11.6% |
| Total | 164 | 85.1 | 100% |

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
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