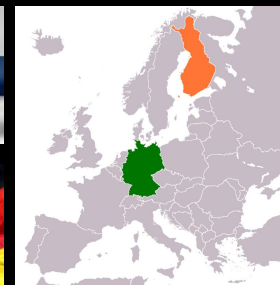




30th September 2025

German Retail Landscape and Premium Private Label Opportunities for Finnish Companies



IPLC

IPLC Partner D-A-CH

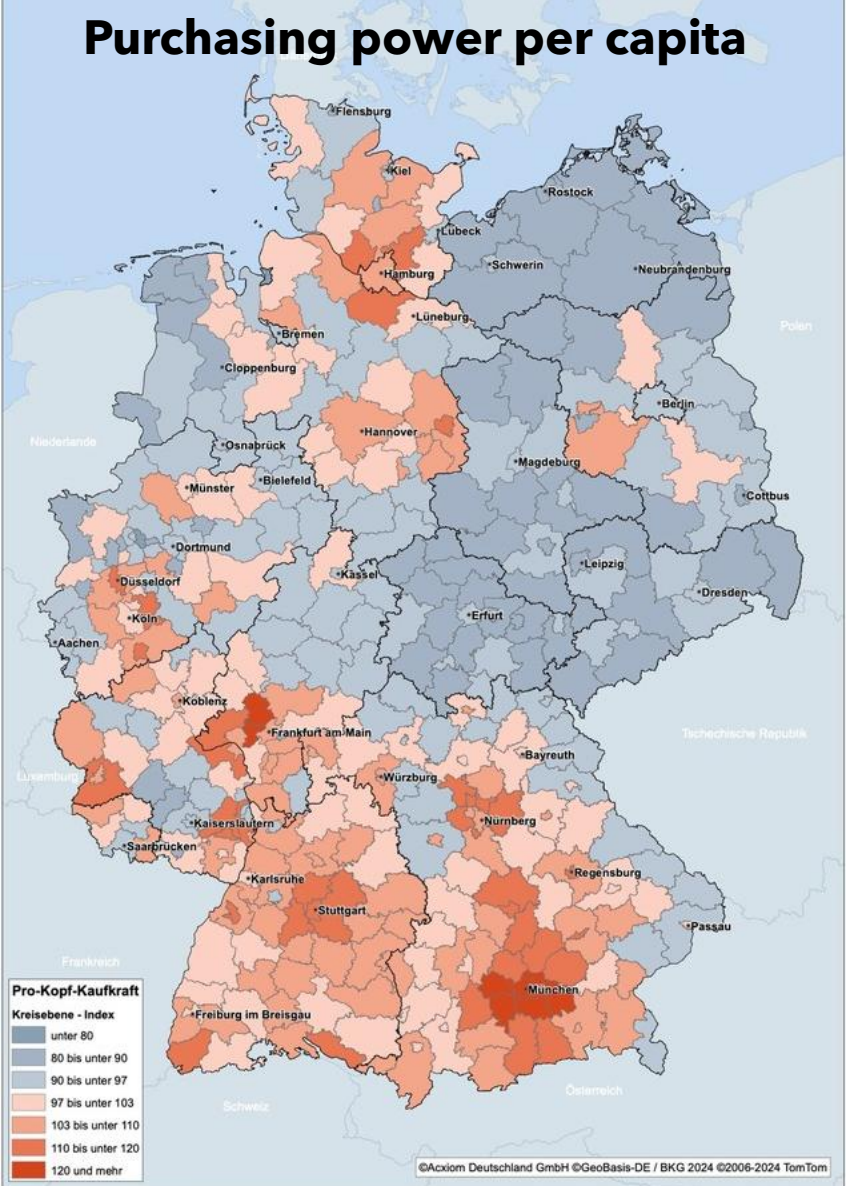


- ▶ René Dolata
- ▶ IPLC Partner since 08/2022
- ▶ Based in Dortmund

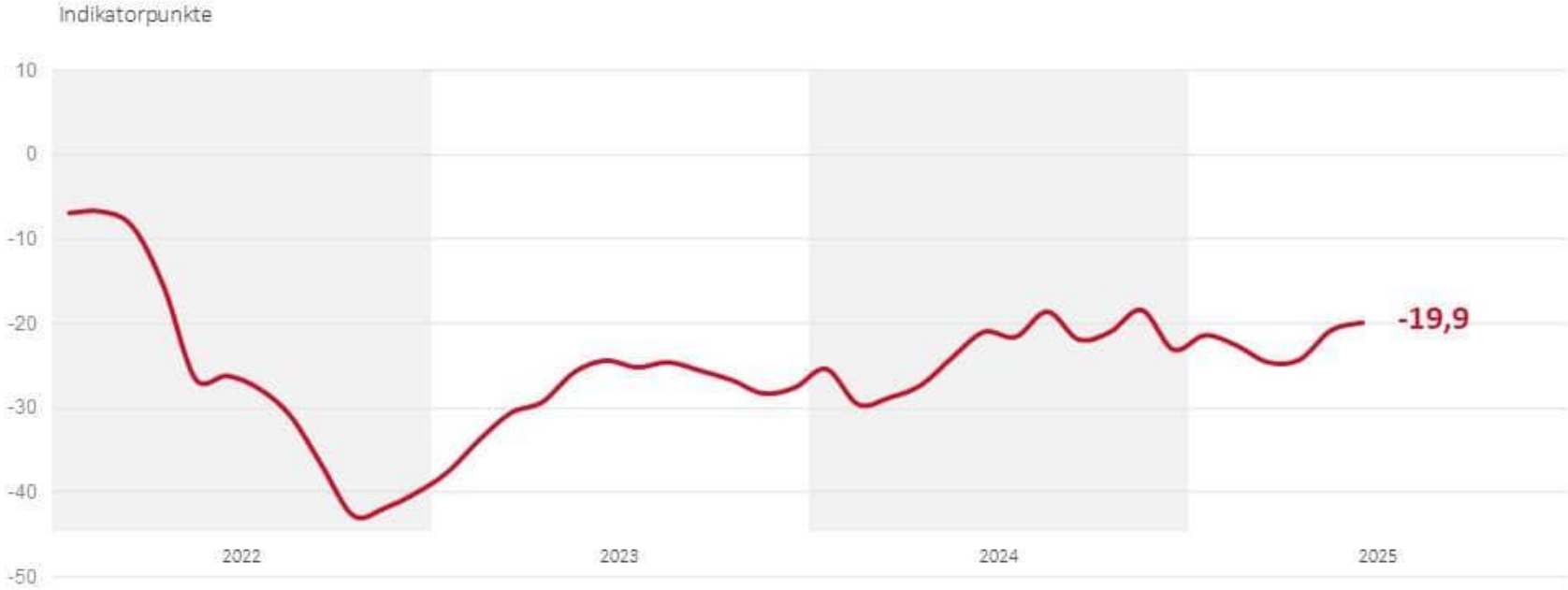
- ▶ > 30 years FMCG Marketing and Sales
- ▶ > 20 years Private Label
 - J.W. Ostendorf GmbH & Co. KG – paints and laques
 - Luhns GmbH – detergents, cleaners and personal care
 - Wilkinson Sword GmbH – razors and blades
- ▶ Interim Management in Sales, e.g. in dairy



Germany is different across the country



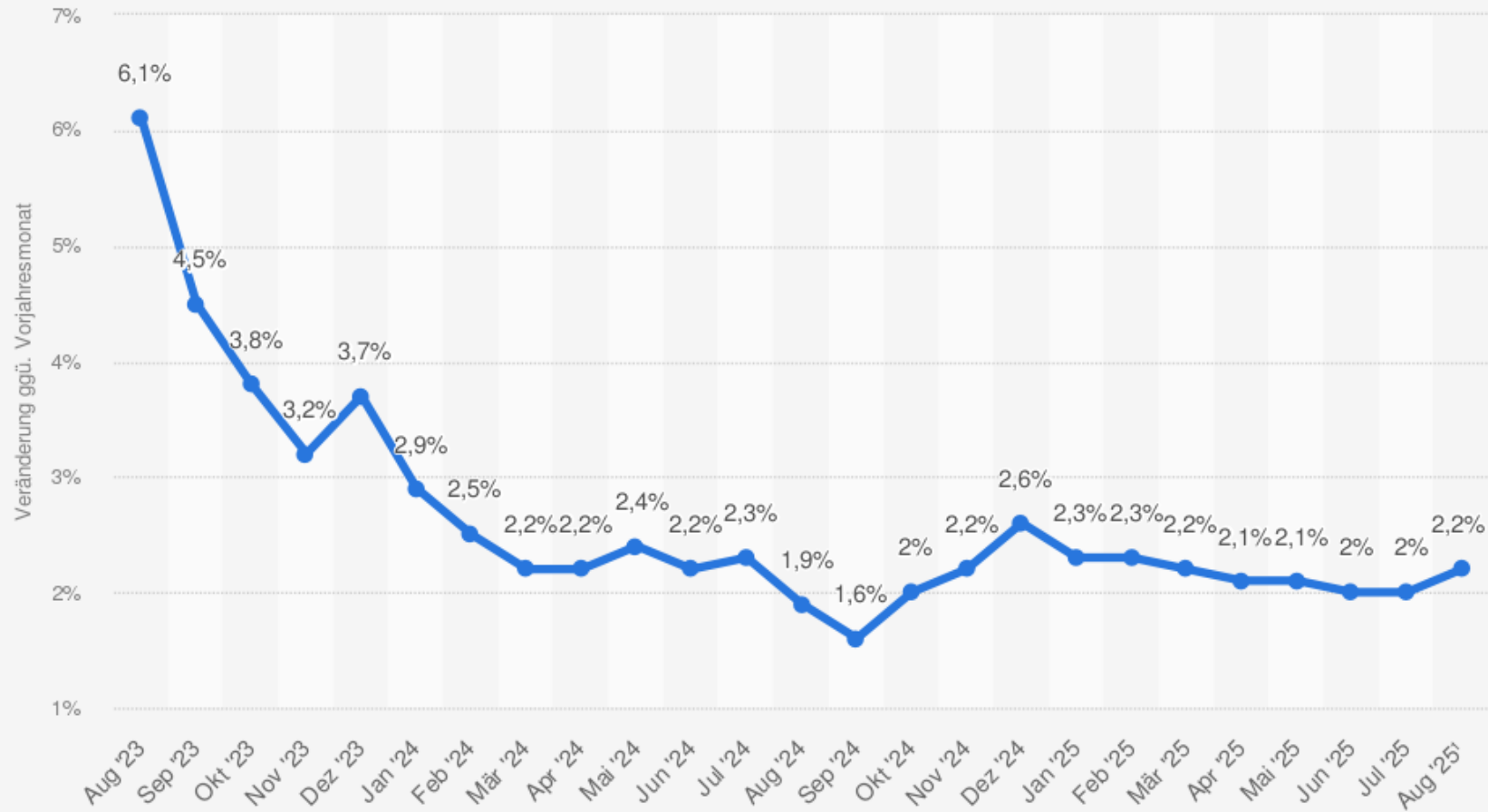
Consumer Climate still negative but slightly improving



	Monat			
	3/2025	4/2025	5/2025	6/2025
Indikatorpunkte	-24,6	-24,3	-20,8	-19,9

Quelle: GfK Konsumklima powered by NIM, kofinanziert durch EU-Kommission

Inflation rates in Germany

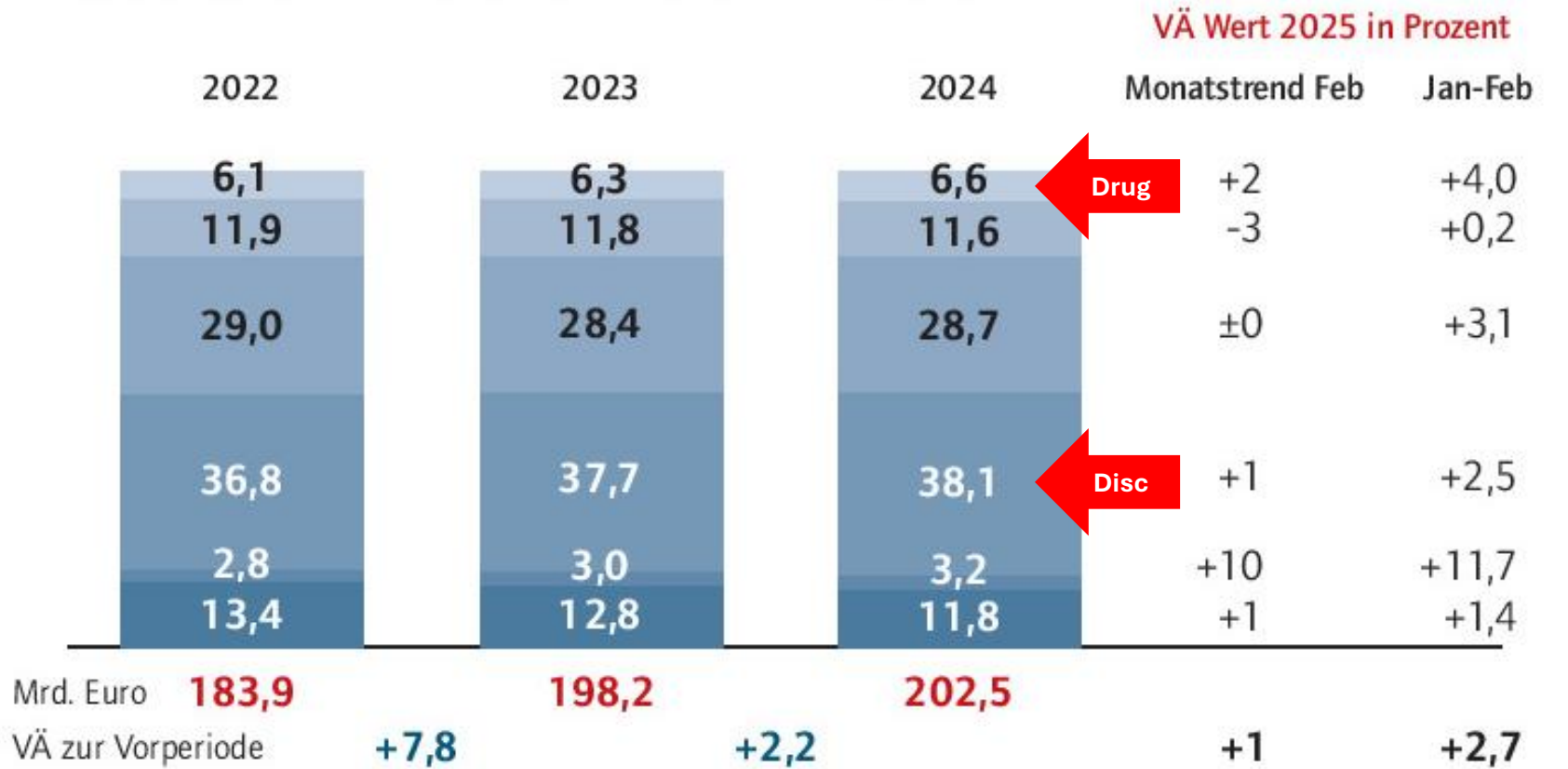


Quelle
Statistisches Bundesamt
© Statista 2025

Weitere Informationen:
Deutschland; Basisjahr 2020 = 100



Shares per retail format / Discount continuously gaining share



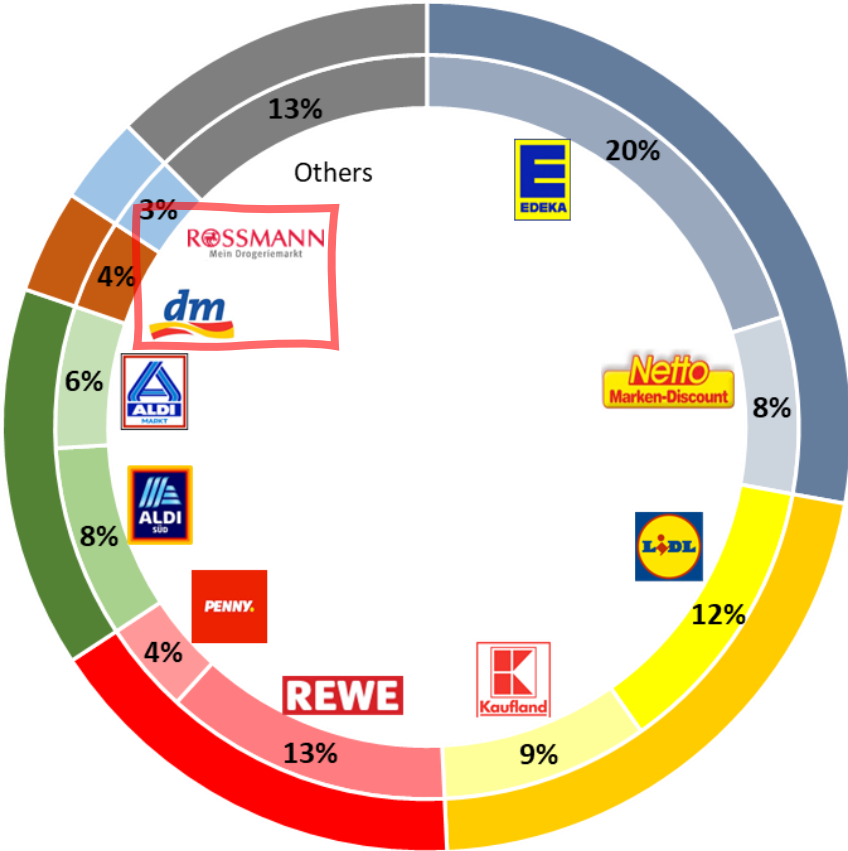
■ Drugstores
 ■ Dept. stores
 ■ Supermarkets
 ■ Discounter
 ■ E-Commerce
 ■ Spec. retail

Stand jeweils zum Jahresende, Bonsumme FMCG (inkl. Frische) *SBW mit Real-Effekt

LZ GRAFIK; QUELLE: YOUNGOV FMCG

Market shares in German FMCG

- ▶ Total market 219 b€ net sales
- ▶ Big 4 make 80% in FMCG net sales with ca. 25.000 stores
 - ▶ **EDEKA Group** (incl. Edeka and Netto)
 - ▶ **SCHWARZ Group** (Lidl and Kaufland)
 - ▶ **REWE Group** (incl. Rewe and Penny)
 - ▶ **ALDI** (North and South)



EDEKA



Headquarters, New York Ring 6, Hamburg

- 7 Regions



56b€ net sales

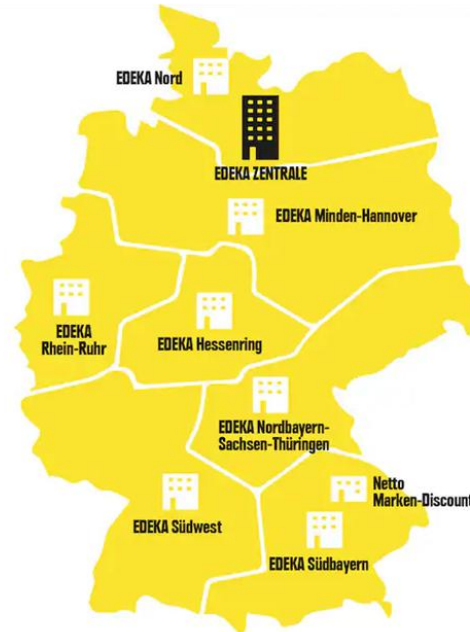
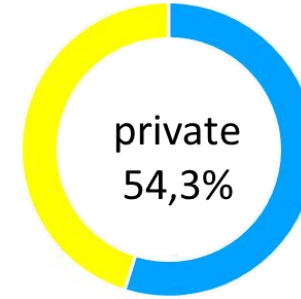
- #1 Deutschland
- #5 Europa



29% market share in FMCG



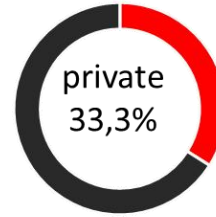
11.231 stores



REWE



Headquarter Rewe Group
Domstraße 20, Köln
21 countries



31 Mrd. € net sales



16% market share in FMCG
#4 in Germany
#3 in Europa



6.844 stores

REWE **REWE:XL**

**REWE
TO GO**

WASGAU

PENNY.

nahkauf

akzenta
lecker, günstig, nett

AUF EINEN BLICK 2022

HANDEL DEUTSCHLAND



HANDEL INTERNATIONAL



CONVENIENCE



BAUMARKT



TOURISTIK



SONSTIGE



IN DIESEN LÄNDERN SIND WIR VERTRETEN



BELGIEN CONWAY, KONING AAP - **BULGARIEN** BILLA - **DÄNEMARK** APOLLO - **FINNLAND** APOLLO - **FRANKREICH** KUONI - **GROSSBRITANNIEN** KUONI - **ITALIEN** PENNY - **KROATIEN** BIPA - **LITAUEN** IKI - **NIEDERLANDE** LEKKERLAND, PRIJSVRIJ VAKANTIES - **NORWEGEN** APOLLO - **ÖSTERREICH** BILLA, PENNY, BIPA, ADEG, DERTOUR, MEIERS WELTREISEN, BILLA REISEN - **POLEN** DERTOUR, MEIERS WELTREISEN, EXIM TOURS - **RUMÄNIEN** PENNY, DERTOUR - **SCHWEDEN** APOLLO - **SCHWEIZ** KUONI, HELVETIC TOURS, ITS COOP TRAVEL - **SLOWAKEI** BILLA, DERTOUR, MEIERS WELTREISEN - **SPANIEN** CONWAY - **TSCHECHIEN** BILLA, PENNY, DERTOUR, MEIERS WELTREISEN, EXIM TOURS, FISCHER GROUP - **UNGARN** PENNY, DERTOUR, MEIERS WELTREISEN

ALDI



Aldi Nord, Essen, North Rhine Westphalia



Aldi Süd, Mülheim, North Rhine Westphalia

15 % market share in FMCG



number of products: ca. 1.750

Private Label share: 79%



2.220



1.940

total 4.160 stores



12b€



16b€

total 28b € net sales



Quelle: Statista

SCHWARZ GROUP

SCHWARZ

pre
zero

Im Dienste der Umwelt: Unser Abfall- und Recyclingmanager für ein sauberes Morgen

SCHWARZ
PRODUKTION

Verantwortung von Anfang an: Unser Lieferant für höchste Qualität und Nachhaltigkeit



#2 in Germany
#1 in Europe

Vielfalt ist unsere Stärke



Die Schwarz Digits in Zahlen

7.500 IT und Digital-Experten bilden das Herzstück des digitalen Ökosystems.

1.250 IT- und Digitallösungen stellen wir unseren Kunden, Unternehmen und Organisationen der öffentlichen Hand bereit.

34 IT-Einheiten weltweit sorgen für maximale digitale Souveränität.



LIDL



Neckersulm, Baden-Wuerttemberg



12% market share in FMCG



number of products: ca. 4.500

Private Label share: 60%



3.250 stores



24b net sales



KAUFLAND



Kaufland Dienstleistung GmbH & Co KG, Neckarsulm



- Part of Schwarz Group
- Markant member
- 7 DCs
- 8 countries



25,5b€ net sales



9% market share



725 stores (hypermarkets)



Loyalty Programs



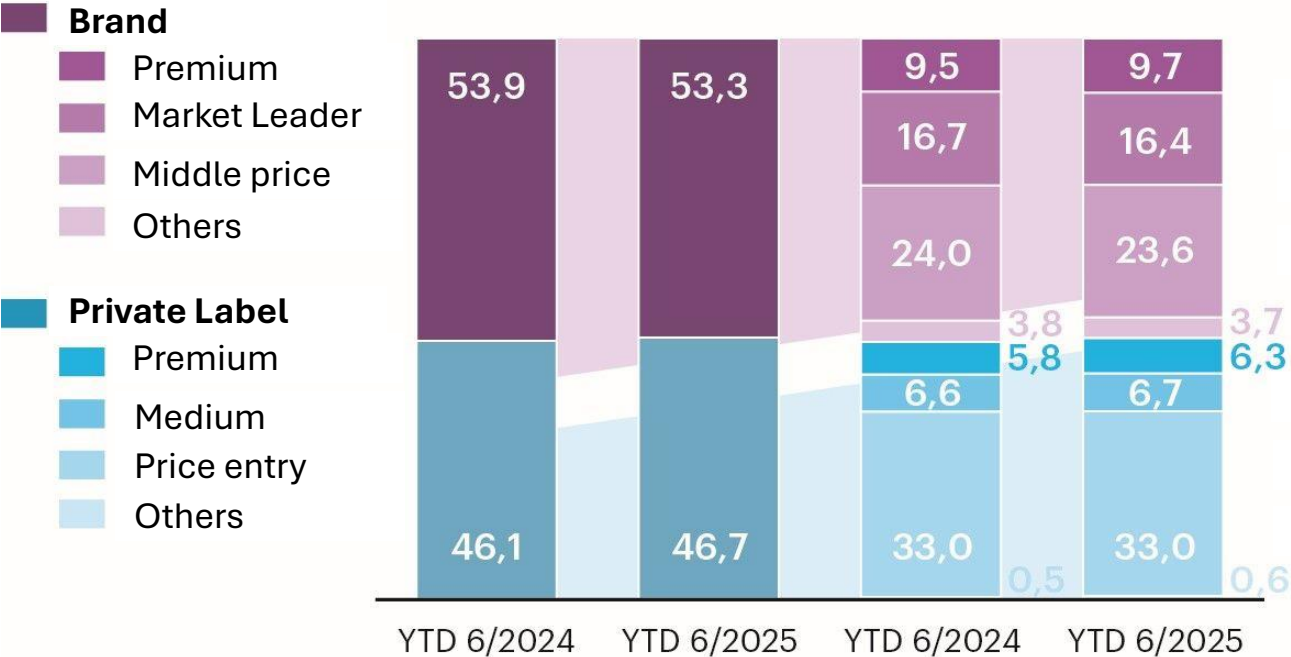
Multi-Partner Program



Market Share per Quality Level in Brand and Private Label

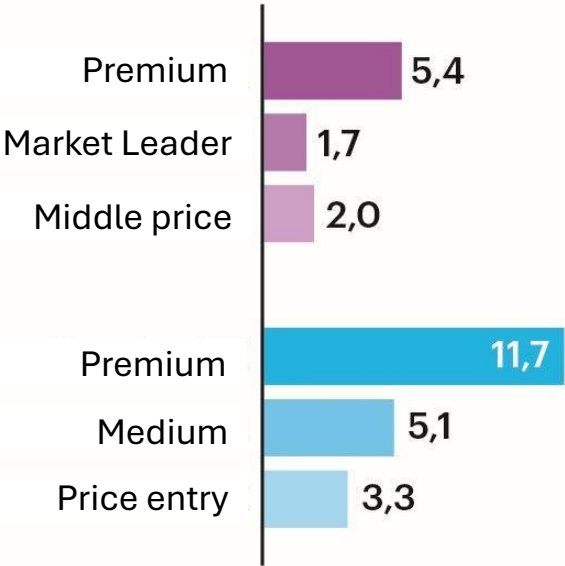
In first half-year, premium brand and premium private label are gaining share

Market share brand and PL



Sell-out development

YTD 6/2025 vs. YTD 6/2024



Private Label Quality Structure in Germany

- ▶ German PL quality structure is Good-Better-Best
- ▶ Poor quality as price entry level does not exist
- ▶ Lowest quality level is defined by Aldi standard
- ▶ NGO ratings like Stiftung Warentest and Ökotest are important
- ▶ Retailers obligate PL manufacturers to match quality of branded market leader (and/or Aldi) on PL price entry level
- ▶ With “Regional”, “Organic” or “Vegan” retailers add additional quality stages into their PL architecture
- ▶ Room for creativity and exclusivity in medium, premium and luxury Private Label
- ▶ Added value or extraordinary recipes needed to justify premium and luxury PL
- ▶ Premium and luxury tier in food retail during the whole year, in discount seasonal peaks with luxury PL products like X-Mas, Easter, Spanish week, French week etc.



What's needed to be preferred PL-supplier in German retail?

Requirements

- Comply with German legislation
- Required certifications and audits
- Sustainable (product, packaging and transport)
- Delivery reliability
- Provide full and correct data in time
- Competitive price



To become a preferred supplier

- Uniqueness
- Understand the market, the retailer and the consumer insights
- Build a relationship



EDEKA Premium and Luxury PL



Price / Quality

EDEKA
GENUSSMOMENTE



REWE Premium and Luxury PL



Price / Quality

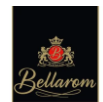


ALDI North & Soth harmonized Private Label



Price / Quality

LIDL Premium and Luxury PL



Price / Quality

IPLC The Retailer Brand Specialists



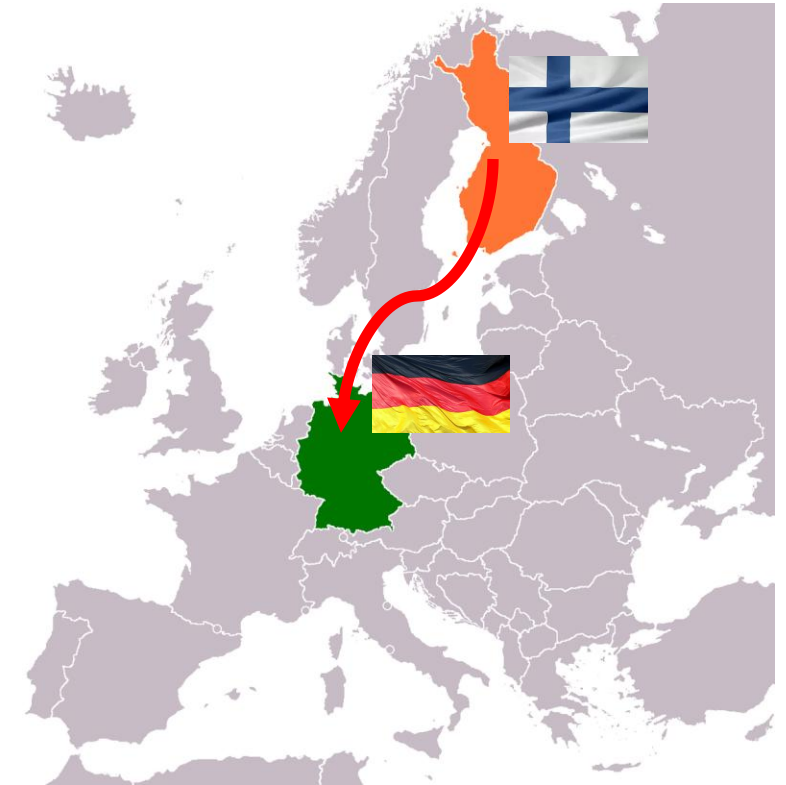
15.09.2025

Lidl expands premium segment

Lidl has permanently added selected products from its high-quality own brand 'Deluxe' to its range. Until now, these products were mainly available seasonally, for example at Christmas or Easter. According to the company, 'Deluxe' products differ from the regular range in terms of their origin, more complex manufacturing processes and attractive packaging.

Key Take-Aways

- ▶ German retailers are open for new suppliers, especially in PL
- ▶ PL is all about differentiation from competitors, so new suppliers from “new” countries are welcome
- ▶ There are huge opportunities to enter German PL market, however processes and requirements (quality, regulatory, logistics, etc.) needs to be understood before approaching retailers. IPLC market entry guides provide guidance for Finnish manufacturers.
- ▶ PL Premium and Luxury segments are ongoing increasing
- ▶ Shoppers still buy in brick and mortar. Online is gaining share still on a small base
- ▶ Strong focus on pricing as Lidl tries to take over price leadership from Aldi
- ▶ Deep category development know how on retailer’s side
- ▶ Supplying PL to German retail can lead to a long-term partnership
- **Doing things right from the very beginning**
- **IPLC-Team is happy to discuss and to support you on your way to German retail**



IPLC Partner



Many thanks!

In case you want to evaluate your business opportunities in Germany in depth, or if you want to join a guided store visit with important background information in January, please reach out to Juha Korhonen



René Dolata
Partner DACH

m +49 176 60 86 77 82

e rdolata@iplc-europe.com

 www.iplc-europe.com

 [linkedin.com/in/rené-dolata-044a7343](https://www.linkedin.com/in/rené-dolata-044a7343)



Juha Korhonen 

m +358 40 711 59 16

e jkorhonen@iplc-europe.com

www.iplc-europe.com