The Value of European Retail

A factbook

EuroCommerce for retail & wholesale

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& wholesale

This graphic version of the Value of European Retail factbook is based on extensive desk research by Chris Smith, an independent analyst, directed by Christian Verschueren, Christel Delberghe and Jean-Albert Nyssens, respectively director-general, executive director for competitiveness and communication, and chief economist at EuroCommerce. It captures data and contributions from member associations, official statistics, consultancies and research organisation. The EuroCommerce staff also contributed to the factbook. The authors are grateful to all those contributors.

You can access the full version of the Value of European Retail factbook (a set of 150+ slides) at **www.eurocommerce.eu**

July 2021

Foreword

Facts matter!

Facts and figures are essential to provide evidence and to show scale and dimension of the retail sector. As proof points, they also form a solid basis for underpinning policy arguments.

By bringing together relevant data from our national associations, official statistics, research organisations and consultancies, and compiling them in a structured way, we have sought to fill an important gap.

We hope that this first “Value of European Retail” factbook will provide a valuable source of information and knowledge for anyone wishing to know more about European retail.

Christian Verschueren
Director-General

Contents

I What is Retail?

A few basic definitions

Retail

The sale of goods to the public in relatively small quantities for final use or consumption rather than for resale. Etymologically, the word retail stems from the French word "retailler" which means "cut back, cut off, into smaller pieces".

Today, the word is used for a wide diversity of players selling a wide array of products and services to consumers, i.e. B2C, through many store formats and channels, including online. Retailers operate through various business models, such as large integrated chains of stock listed or private companies, groups of small independent retailers or franchisees, or consumer cooperatives.

Distributive trade

The technical and statistical definition of the business sector involved in commerce and trade, and covering retail, wholesale, and distributive trade, grouped under statistical NACE codes G45 47; for the purpose of this factbook, only G47 (retail trade) is taken into account, at the exclusion of G45 (car sales and repair) and G46 (wholesale, B2B trade).

Commerce

A broad term describing the activity of trading, buying and selling, and including both retail and wholesale activities. Sometimes also used to define the distributive trade sector. Often used with the prefix "e --" to describe online retail ("e commerce").

Shop / store

A building or part of a building where goods or services are sold to final customers. The word is evolving to describe e-commerce operations as well ("e-shop", "webshop"). The words "shop" and "store" are used in interchangeably in this report, even though the word "store" is more frequently in use in the US than in Europe.

European retail in numbers

Retail annual turnover is **€3.2 trillion**

- This represents almost **1/5 of European GDP**
- This represents about **1/3 of total household consumption**

3.5 million retail businesses across Europe

- **99% of these are SMEs:**
  - 60% of employment
  - 50% of turnover
  - 50% of added value
- but also global leaders: **Carrefour / Tesco / Metro / Ikea / Kingfisher/ Ceconomy / Schwarz / Inditex**

Retail employs close to **20 million people**

- Together with 10 million in wholesaler, **retail & wholesale employ 1 in 7 working European**
- **62% are women** (European average is 46%)
- **15% are young people under 25** (European average is 9%)
- **Local jobs:** in 95% of Europe's regions, retail is #1, #2 or #3 employer

Europe is a **global leader** in retail

- **24 retailers among the top 50** global leaders,
- But it is losing ground in the top 10 global retail league:

	2008	2019
1.	Walmart	Walmart
2.	**Carrefour**	Amazon
3.	**Metro AG**	Costco
4.	**Tesco**	**Schwarz**
5.	**Schwarz**	Kroger
6.	Kroger	Walgreen Boots Alliance
7.	Home Depot	Home Depot
8.	Costco	**Aldi**
9.	**Aldi**	**Carrefour**
10.	Target	CVS

I What is Retail?

If retail did not exist, what would we miss?

Many products in one place

Shoppers would need to go to many more places to find the products they were looking for, be it in food and groceries or non food.

Choice: a broad range of products and services

Retailers, through the different segments that they cater for, allow shoppers to access a broad range of products and services and define themselves where to buy on the quality vs price scale. There is also a broad range of shop formats.

Immediate availability

In stores and warehouses, retailers maintain stocks of products and make products readily available. Only when products are sold out, or out of stock, does the shopper realise that value. In e-commerce, this translates into fast delivery times.

Efficiency and speed of moving goods

Retailers have developed very strong and dense networks of warehouses, transport and stores, allowing goods to move efficiently and quickly from all over the world. Without these, we would have a combination of less variety, more traffic congestion, increased time to identify and access products.

Reach & density

The possibility to go into a store a short distance from my home or office, or better, the ability to have the goods delivered where I want them.

Time saver

Retail saves significant time and energy by providing a wide range of products "under one roof" in stores and / or in combination with a broad e-commerce catalogue that can be rapidly delivered / picked up.

Affordable prices

By consolidating volumes, retailers place mass orders on behalf of customers, hence reducing production costs and prices. In making bulk purchases, their stores allow thousands of shoppers to make individual purchases and benefit from better conditions.

Transparency & comparison

Increasingly, through barcodes, price indicators, labelling, certification of origins, shoppers know better what they are buying and can compare products and prices.

Fun experience

Shopping is also a leisure activity. It can be a real pleasure when stores provide a fun/pleasant experience and are staffed with friendly and welcoming sales associates.

Inspiration

Through the buying, producing, curating and displaying of products, retailers inspire shoppers with new food & recipes, attractive ways to dress, new ways to improve their home or better ways to follow their hobby or sport.

Social interaction

Shops and malls continue the tradition of markets set up centuries ago where people trade goods in a common place. For many people, the local store or supermarket is one of the main places where they interact with other people.

Identification

Many people identify with the retailers where they shop. These shops are part of their identity.

Trust & assurance

The shopper trusts that the retailer selects and curates quality and safe products for his/her at the best conditions, from reliable suppliers.

Quality, safety & freshness

In food, this also translates into freshness, safety and respect of cold chain / end of use dates.

Vibrant cities, towns, and villages

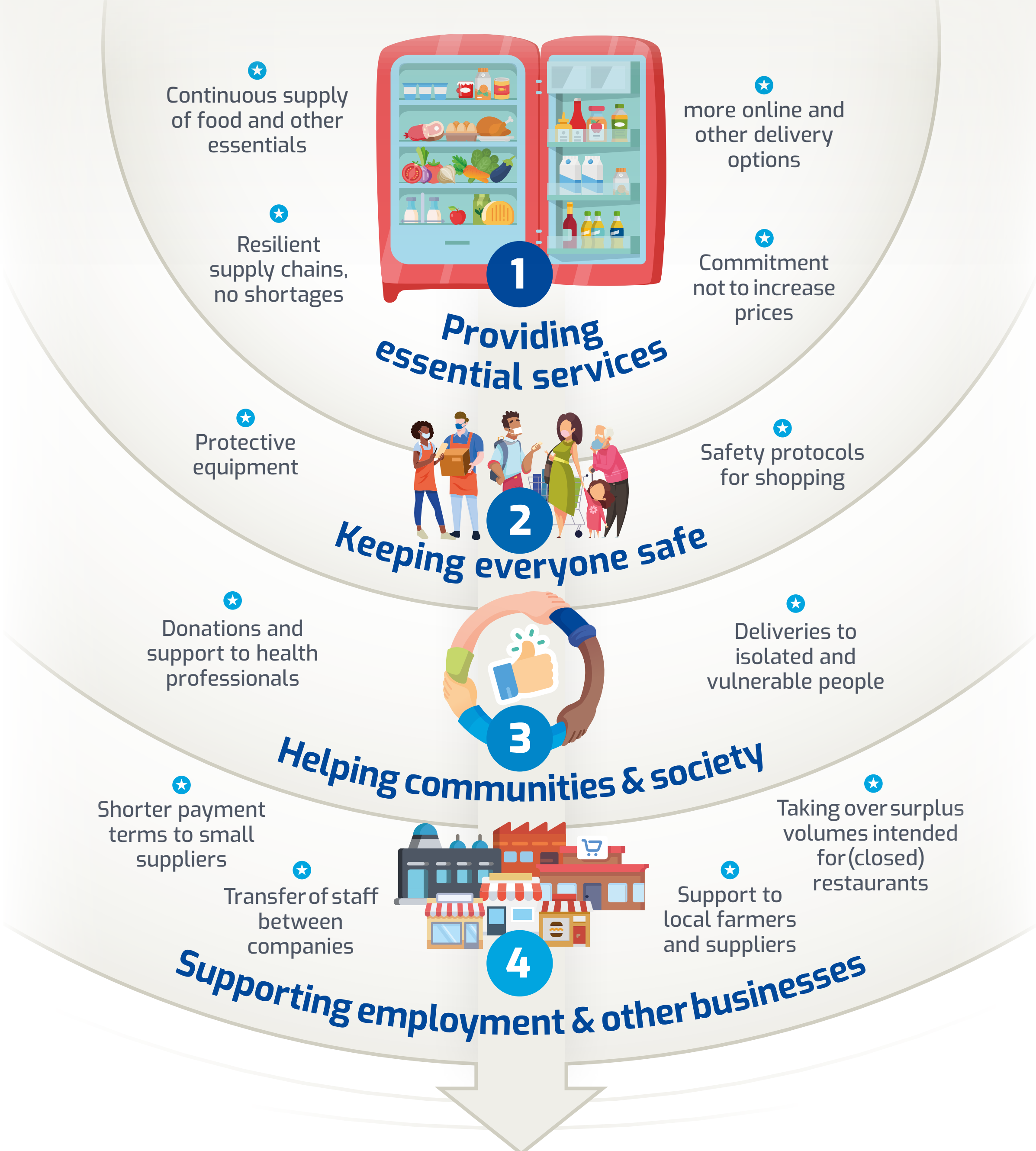
Thanks to the many retail outlets of large and small companies, and together with cafés, restaurants, (movie) theatres, museums, cultural centres, and art galleries, town centres are vibrant communities and places people want to go.

Jobs

Retail provides close to 20 million jobs in Europe to many women, young, sometimes people with lower levels of education, giving them opportunities and training.

II Retail and COVID

An essential ecosystem for all Europeans

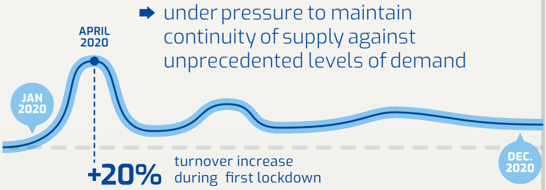


Responsibility ★ Solidarity ★ Cooperation

Impact of COVID-19: «A tale of two cities...»

«...it was the best of times»
for retailers selling food and groceries, the so-called "essentials", but also DIY, toiletry and hygiene products, petfood, computers, printers, video games

➡ under pressure to maintain continuity of supply against unprecedented levels of demand

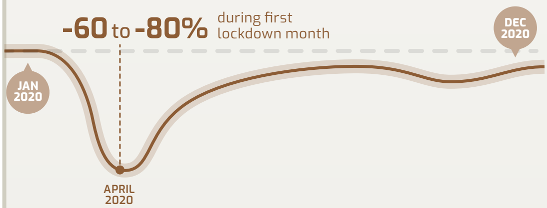


- **Higher, volatile demand**
  leading to shortages of supply in selected key categories
- **Higher sales**
  from closure of restaurants and canteens
- **Higher costs**
  · safety measures
  · additional labour costs
  · handling volatile demand
  · logistics and supply chain disruption

Source: Nielsen

«...it was the worst of times»
for retailers selling so-called "non-essentials", i.e. clothing, luxury, furniture, or in tourist areas, as well as for wholesalers selling to restaurants, hotels, cafés.

➡ ordered by government to close or hit dramatically by the restrictions of people's movements or plummeting demand



- **Plummeting sales €300bn** estimated annual losses in Europe;
- **-30 to -40% annual turnover** for fashion retailers
- **Online sales + click & collect** helped, but did not compensate for lost sales
- **Bankruptcies** e.g. **50,000** expected in Germany

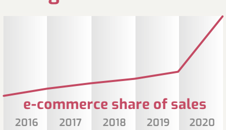
Source: Eurostat, McKinsey

A shift to online shopping and working

- **Online trend is there to stay**

Online sales growth accelerated by restrictions on brick-and-mortar stores

- **Digital investment accelerated**



6 years online growth in 8 months in the apparel, fashion and luxury sector

Source: Eurostat, McKinsey

Changing consumer behaviour

- **Depressed consumer confidence**
  50% of consumers are looking for a way to save money
- **Price is top priority for consumers**
- **Focus on health and sustainability**
- **Safety first !**
  30% of consumers view disinfection and safety measures as top priority for shopping in-store

III Challenges and mega-trends

Digital transformation of retail

2019 vs. 2004

64%

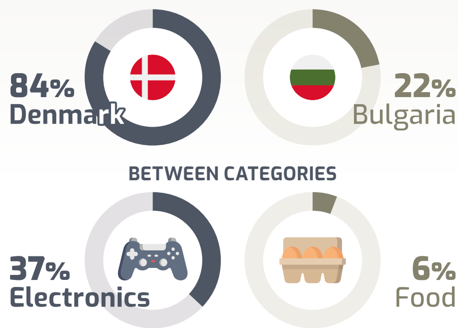
of European consumers shopped online

up from **22%** 15 years ago

Source: Eurostat

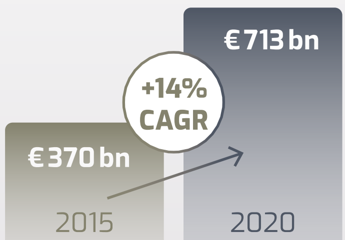
WITH HUGE DIFFERENCES:

BETWEEN COUNTRIES



Double digit growth

of e-commerce sales every year in Europe



Source: RetailX, Ecommerce Europe, Eurostat

The future is omnichannel

58% of consumers are shopping omnichannel

for **75%** of spending

DE example

Source: HDE, GfK

Acceleration during COVID-19

In COVID-19 times, e-commerce grew as fast in 2 months as in the past 10 years, also in food and groceries

10 years pre-COVID

2 months during COVID

Source: McKinsey

but few retailers are prepared

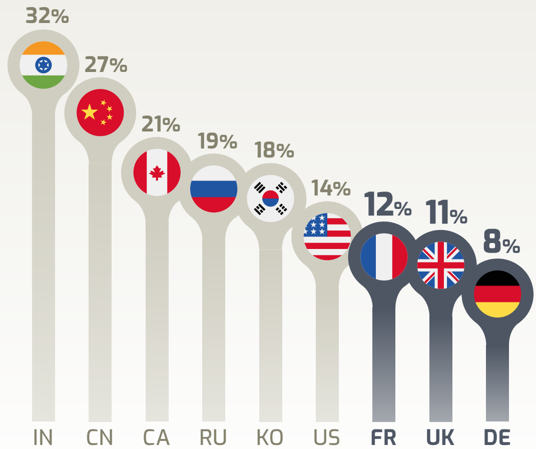
67% of retail businesses have NO e-commerce sales!

Source: Eurostat, 2018, i.e. pre-COVID

E-commerce growth rate

is lower in Europe than in US and Asia

E-commerce growth rate 2018 19, (fcst) %
Source: eMarketer

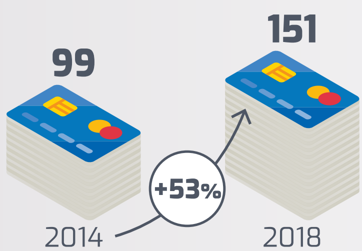


The biggest challenge is

how to make the omnichannel model profitable

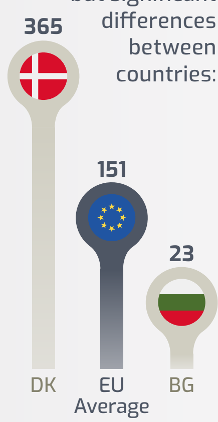
Continuous growth of digital payments

Number of card transaction per person per year (EU27+UK),



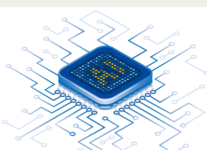
Source: ECB, Eurostat

but significant differences between countries:



but many people still prefer cash

To stay relevant, retailers need to make huge investments in:



Technology

- Process automation
- Robotics
- AI & data
- Fintech
- Blockchain
- Payments

Stores

- New store format, e.g. proximity
- Refurbishment of existing stores

People

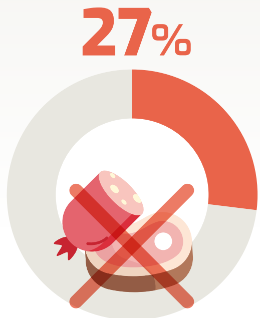
- Reskilling
- Upskilling
- Wages

III Challenges and mega-trends

Growing consumer awareness about health & the environment

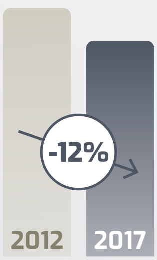
More than two-thirds of European consumers say that their **consumption habits affect the environment**

One-fourth of European consumers say they **will buy less meat in next 5 years, primarily for health reasons**



Source: EuroBarometer, ING

Disappearance and closure of stores in towns and villages



Across Europe, the total **numbers of stores fell 12%**

Source: Eurostat

Vacancy rates

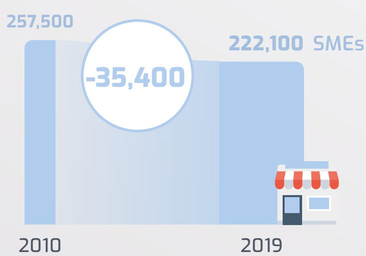
tend to be higher (up to 30%) in smaller towns and shopping centres

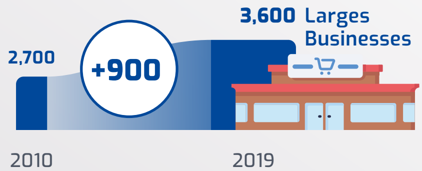
Security

Shop closures lead to a loss of community and higher criminality

Small, independent retail businesses are giving way to larger retail chains

DE example. Source: HDE

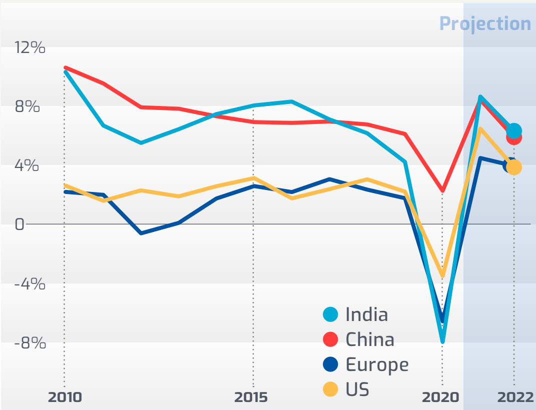




Challenging socio-economic context

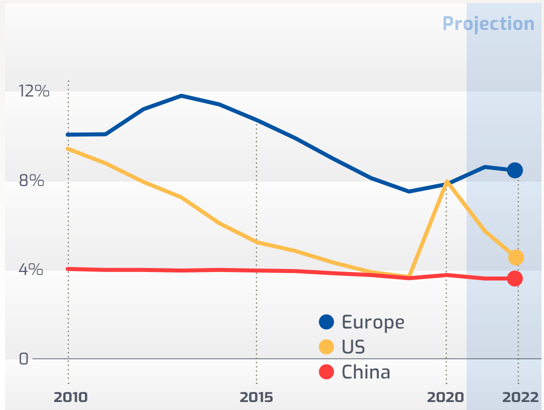
Slow economic growth

compared to US, China, India



Relatively high unemployment

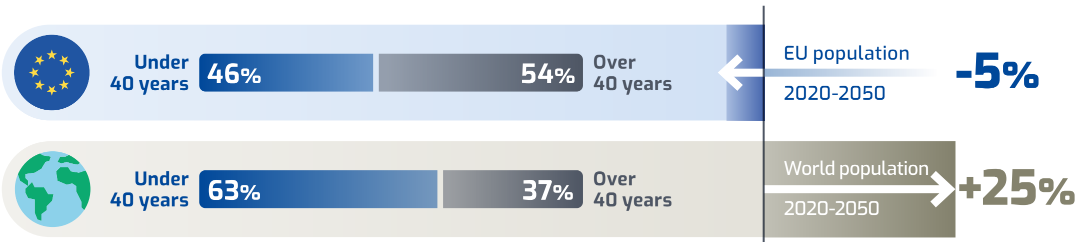
compared to US, China



Source: IMF

Ageing population

Shrinking population



Source: UN, Eurostat

Growing competitive pressure on traditional retailers

IV The value of European retail

Serving customers, helping consumers

1

A Retailers deliver an essential service to everyone's daily life

B Retailers provide choice, access and convenience

C Retailers sell quality products at affordable prices

D Consumers like retailer brands, also known as 'private labels'

E Retailers guarantee quality and safety

A Retailers deliver an essential service to everyone's daily life

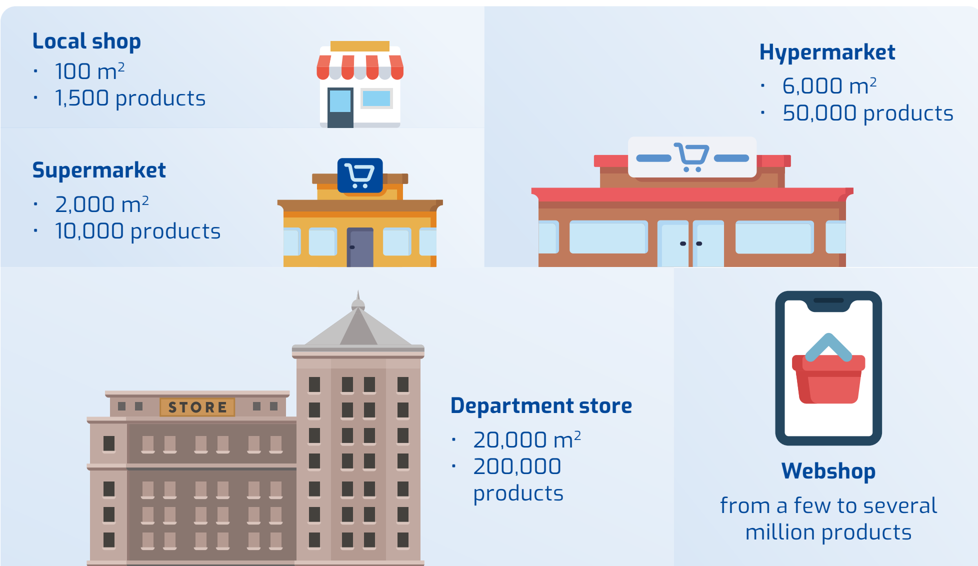
Variety of essential products

Retailers provide an essential service, too often taken for granted: making food and other daily products available and affordable, all the time, everywhere

B Retailers provide choice, access and convenience

Many formats and channels, huge choice

Small stores sell more than 1,500 unique items; hypermarkets up to 80,000 or even 100,000 (numbers are rough averages; there is huge variation between formats, depending on location, business model, etc.)



Source: EuroCommerce members

Retailers have products for all kinds of needs, aspirations, and demands

Grocery shops everywhere, easily accessible

90% of Spanish consumers go shopping for groceries on foot

Source: ASEDAS

Over 99.5% of Germans live within a 15 minute drive (and 57% with a 15-minute walk) of both a discounter and mainstream supermarket retailer

Source: HDE

C Retailers sell quality products at affordable prices

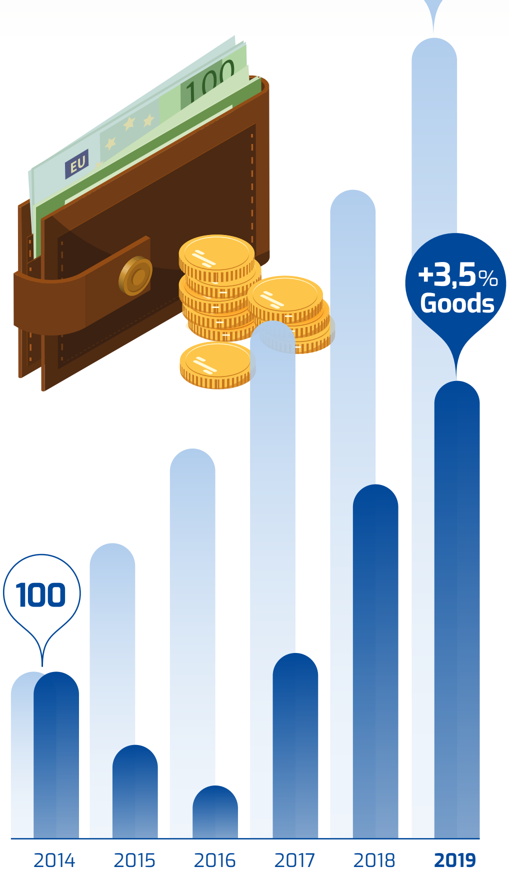
Strong negotiations with suppliers, mass orders, logistics efficiencies, no frills

- Retailers negotiate hard but fairly with suppliers, passing on the benefits to consumers
- Retailers place mass orders with suppliers on behalf of individual consumers
- Retailers master efficiencies in supply chain and logistics
- Retailers control and reduce costs in all their all operations, everywhere, all the time

Consumers benefit

Keeping inflation in check, to benefit the customer's purse

Price inflation of goods is below service price inflation, an effect that can be attributed to retailers



EU27 Household Inflation, 2014-2019 (Index 2014 = 100) Source: Eurostat

D Consumers like retailer brands, also known as 'private labels'

of EU shoppers agree with the following statement:

"private labels are usually extremely good value for money"

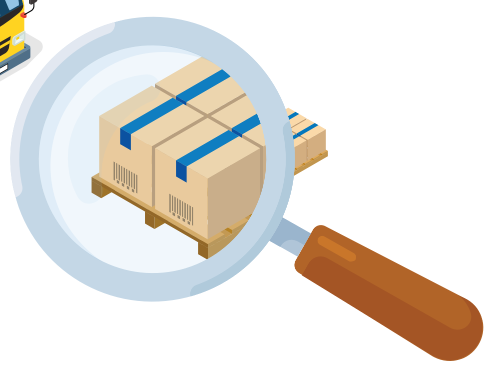
of EU shoppers agree with the following statement:

"I am a smart shopper when I buy private label products"

Source: Nielsen, IR

E Retailers guarantee quality and safety

with quality control, quality assurance and certification schemes, and traceability throughout the supply chain



GLOBALG.A.P. · Global Aquaculture Alliance · FSC · IFS Food · Rainforest Alliance Certified · primus GFS · GRMS · BRCGS · PEFC · Marine Stewardship Council · asc Farmed Responsibly Certified

IV The value of European retail

Being inclusive employers

2

(A) Retail is Europe's number 1 employer

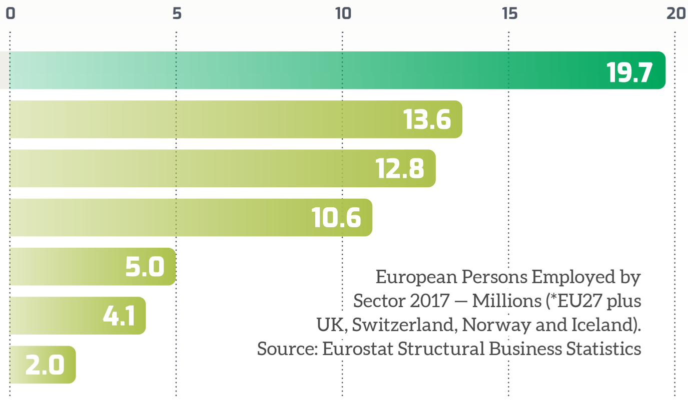
(B) Retailers grow people

(C) Retailers are inclusive employers

A Retail is Europe's number 1 employer

20 million
direct jobs in Europe

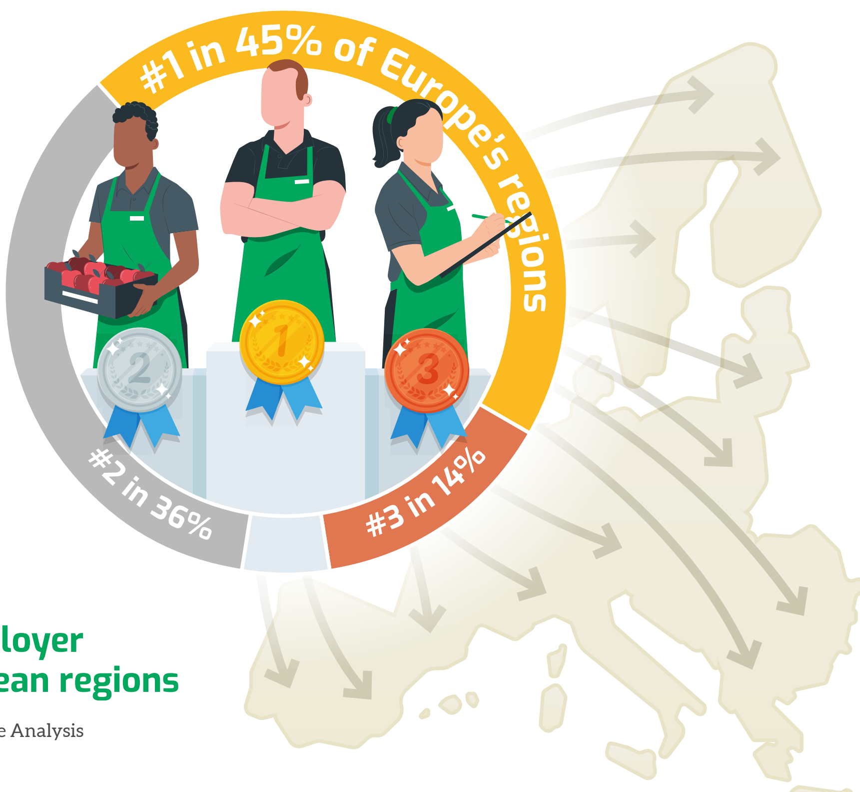
Retail employs 19.7 million people in Europe*, making us the largest private sector employer; with an additional 10.6 million employees in wholesale, the commerce sector employs 1 in 7 Europeans.



European Persons Employed by Sector 2017 — Millions (*EU27 plus UK, Switzerland, Norway and Iceland). Source: Eurostat Structural Business Statistics

Jobs in the communities, everywhere in Europe

Retail is the # 1, 2, or 3 employer in 95% of Europe's regions.



Retail = Top employer in 95% of European regions

Source: Eurostat, EuroCommerce Analysis

We are also a major indirect employer

Advertising
Retailers account for ~10% of total global advertising spend

Data / Advisory

Payment service providers
revenue from retailers hit $1tn globally in 2018

IT

Property investment
Retail accounts for 15% of total in Europe

Energy and other utilities

Retailers are major collectors of waste
batteries, packaging, electric equipment, clothes,...

Suppliers

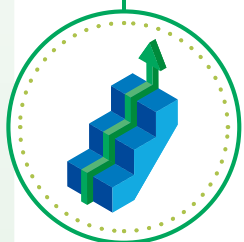
Logistics and delivery services

Professional services

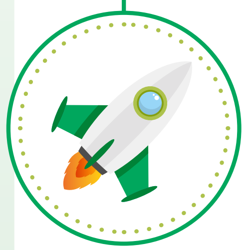
B Retailers grow people

Apprenticeships
We are the leading provider of apprenticeships in several European countries

First entry job
We provide job opportunities for people entering the jobs market, and train staff with less experience



Career progression
We provide real progression opportunities, with a visible pathway from the shop floor to the boardroom



Upskilling and reskilling
We provide upskilling opportunities, so our people keep up with technology, customer expectations, and the job market

(c) Retailers are inclusive employers

First job for many

15% of retailers' workers are under 25

Flexible jobs

32% are part-time workers

For most of those (80%), part-time work in retail is a personal choice, to be combined with other work, studies, or family care.

Source: EuroFound

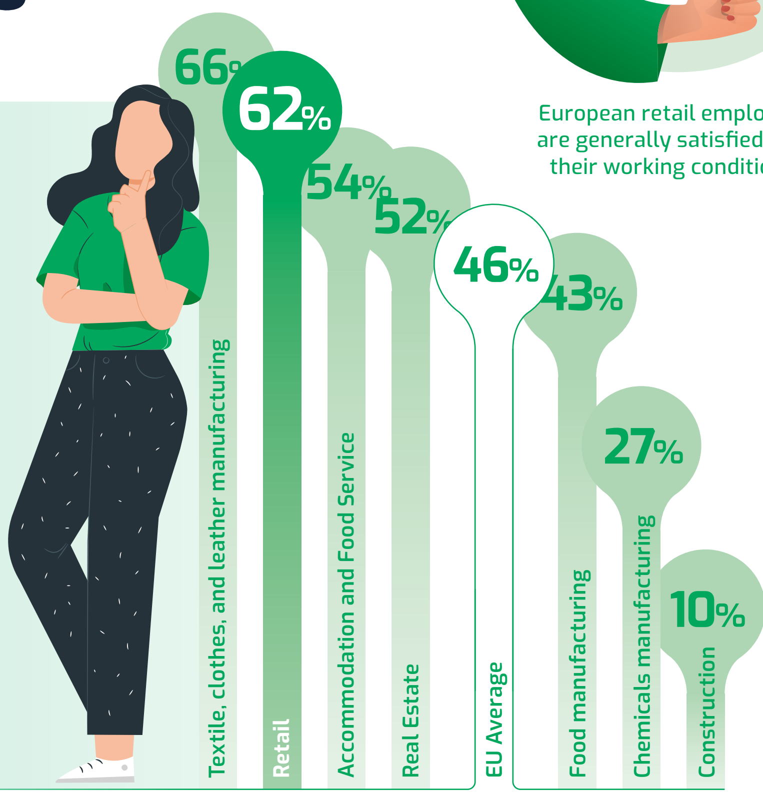
European retail employees are generally satisfied with their working conditions.

Women inclusive

62% of workers

Retail is a key source of employment for women, with 62% of retail workers being women, compared to an average of 46% in Europe as a whole.

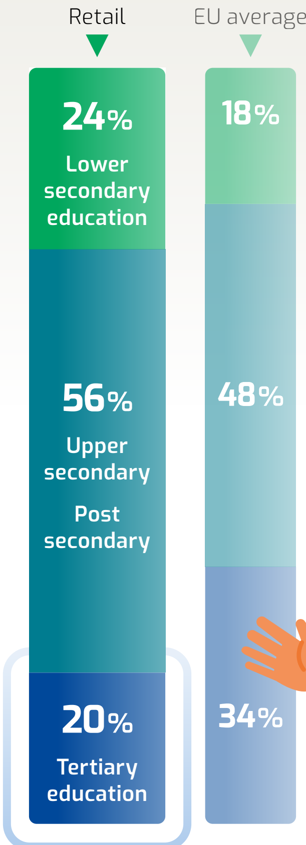
Women as Share of Workforce Europe 2019 EU27 + UK, Switzerland, Iceland and Norway
Source: Eurostat, EuroCommerce Analysis



1 in 4 workers has no upper secondary education qualification

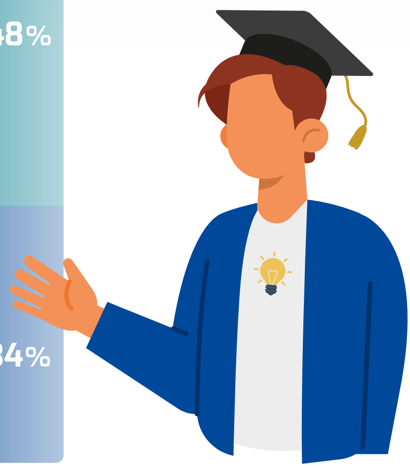
Retail provides job opportunities for workers with less formal education and early school leavers. Retailers help them develop their skills to progress.

Source: Eurostat, Idea Consult



But retail also hires highly skilled people

Retail provides jobs in growth areas like software development, artificial intelligence, and engineering.



IV The value of European retail

Acting sustainably

3

Ⓐ Retailers care for the planet

Ⓑ Retailers help customers to make healthy choices

Ⓒ Retailers value cooperation with suppliers

A Retailers care for the planet by

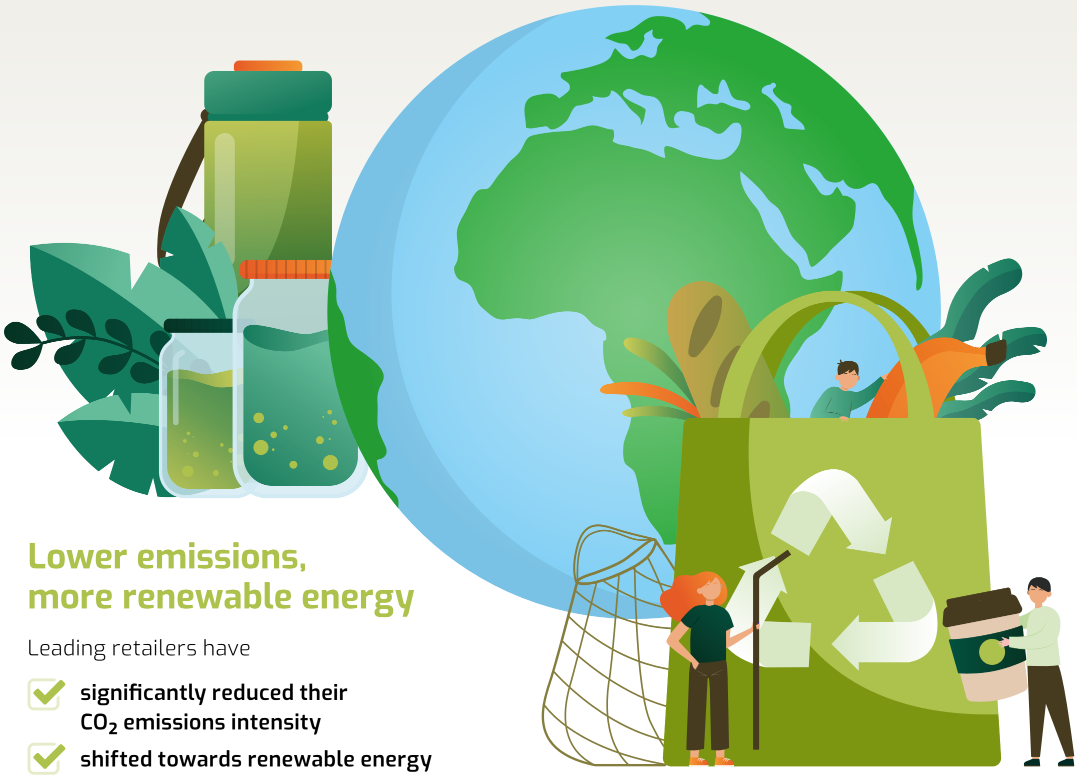
Retailers are engaged

in the shift towards a more circular economy and the UN Sustainable Development Goals.

ELLEN MACARTHUR FOUNDATION

SUSTAINABLE DEVELOPMENT GOALS

- Consumer Goods Forum charters
- National associations' commitments on plastic reduction
- Company commitments on plastics

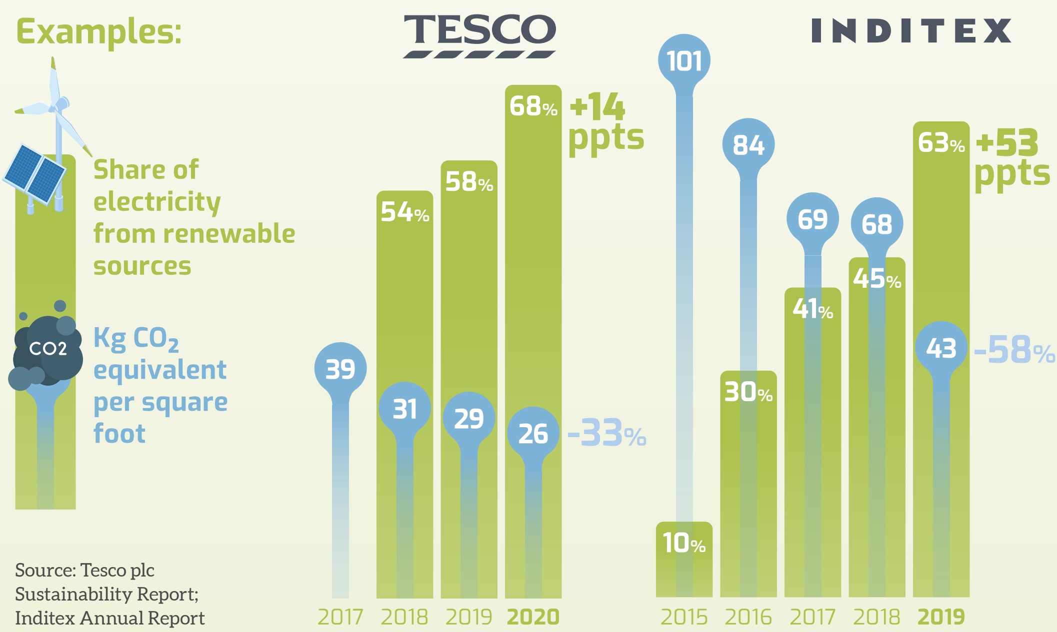


Lower emissions, more renewable energy

Leading retailers have

- significantly reduced their CO_2 emissions intensity
- shifted towards renewable energy

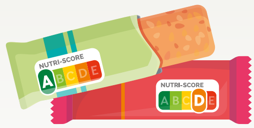
Examples:



Source: Tesco plc Sustainability Report; Inditex Annual Report

B Retailers help customers to make healthy choices

Rebalancing product ranges for a healthier diet



Informative packaging & labelling

Store design & layout

Positive influence

Nudging and making choice for consumers to support and improve their health.

Reformulating products

Encouraging healthy lifestyles

Examples of actions:

LIDL: Lidl Reduction Strategy 2025 (DE) will **reduce salt and sugar** in own brand products by 20%

Carrefour: Carrefour has **reformulated products** to reduce salt, sugar and fat in their own brand products

Ahold Delhaize: Ahold Delhaize (NL, BE, CZ, RO, EL) targets **45%** of private label sales to come from **nutritious products** by 2025

MERCADONA: Mercadona (ES, PT) have introduced **new own brand ranges** to support healthy consumer choices

Jerónimo Martins: In 2020, by reformulating products, Jerónimo Martins **removed** from the market **2,468 tons of sugar**, 58 tons of salt and 212 tons of fat.

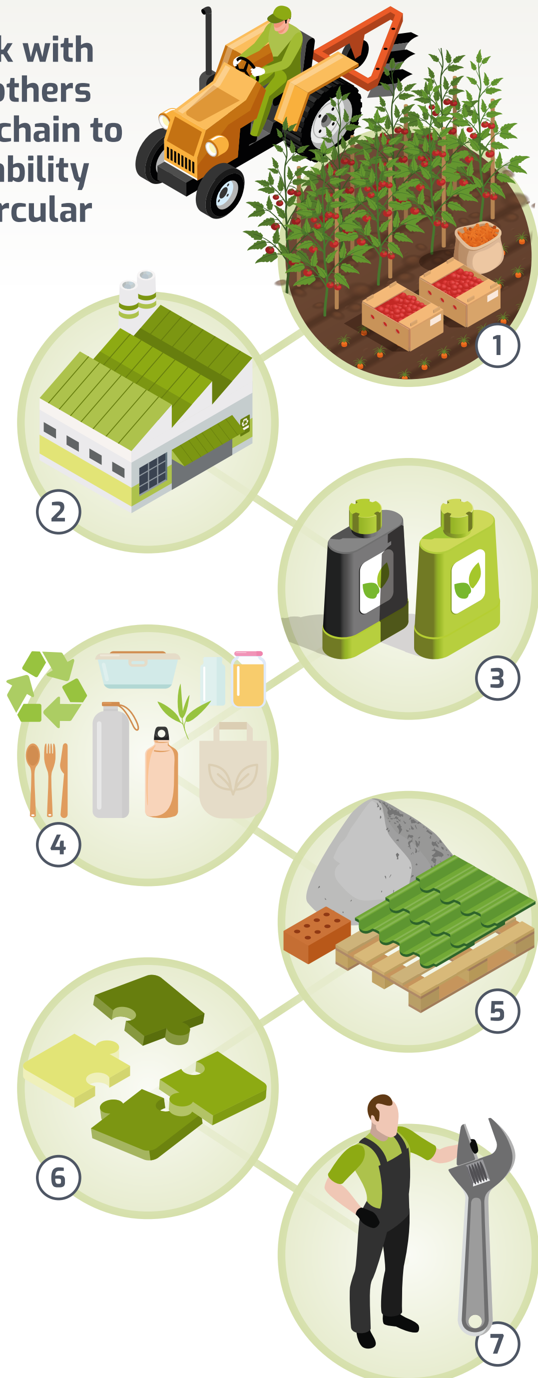
colruyt: Colruyt's encourages consumers to lead **healthy lifestyles** with "Cooking Class" (BE)

DECATHLON: Decathlon (many countries) supports projects with sports as a way to i**mprove health and social inclusion**

TESCO: Tesco (UK, EI, PL, CZ, SK) has **removed sweets and chocolates** from checkout areas to help consumers make healthy choices

C Retailers value cooperation with suppliers

Retailers work with farmers and others in the supply chain to drive sustainability and a more circular economy:



1. Development of organic agriculture
2. Support to local producers
3. Responsible use of chemicals
4. Eco-designed products
5. More efficient use of raw materials
6. Optimisation of processes
7. Take-back and repair services

IV The value of European retail

Contributing to vibrant communities

4

- (A) Retailers are the lifeblood of communities
- (B) Retailers are good neighbours...
- (C) ...and contribute beyond their core business

A Retailers are the lifeblood of communities

They are making cities attractive...

They keep city centres **vibrant & safe**

They are **key investors in cities**

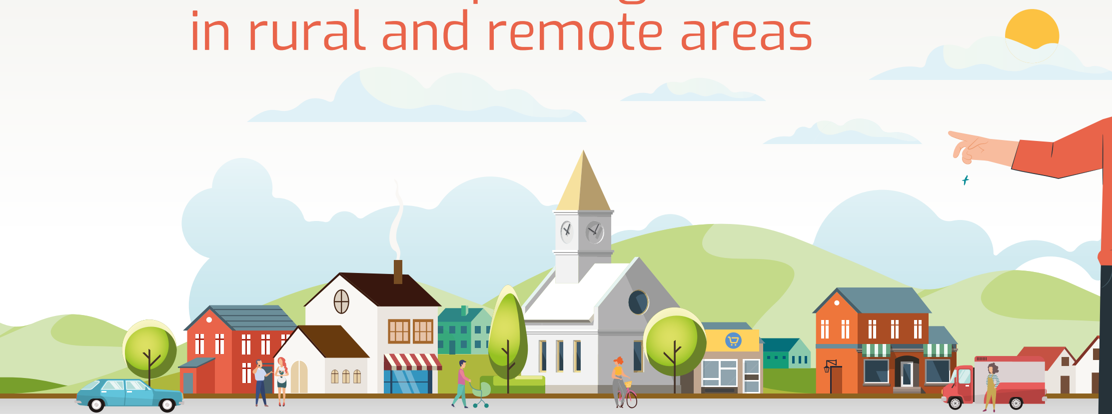
They promote **green mobility**

Shopping is a main reason for people to visit city centres

Consumers' main reason for visiting city centres in Germany

Source: IFH, HDE

...and underpinning communities in rural and remote areas



Retailers make it possible for people **to stay and live in these areas**

They keep **economic activities** in remote areas

Retail ensures rapid access to supermarkets

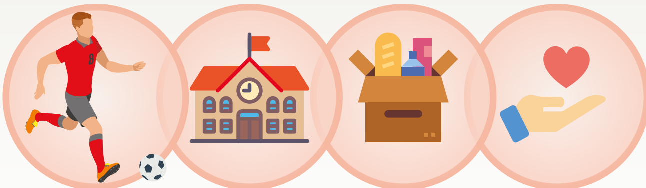
Retail creates local jobs everywhere

Retail is #1, 2 or 3 employer in 95% of European regions

Retail jobs are local by nature

B Retailers are good neighbours...

Sponsorships and donations to local



Sports team

Schools

Charities & food banks

Associations

Retail support the fabric of communities

Creating footfall for other local businesses

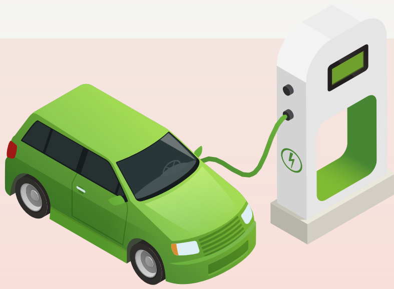
Paying significant local taxes

Selling local farmers' products

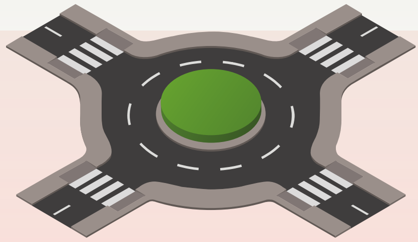
Expanding the market for local suppliers

Supporting digitalisation of small shops

C ...and contribute beyond their core business



Providing charging stations for cars



Funding access roads also benefit other businesses and society

Preserving and giving new life to heritage buildings

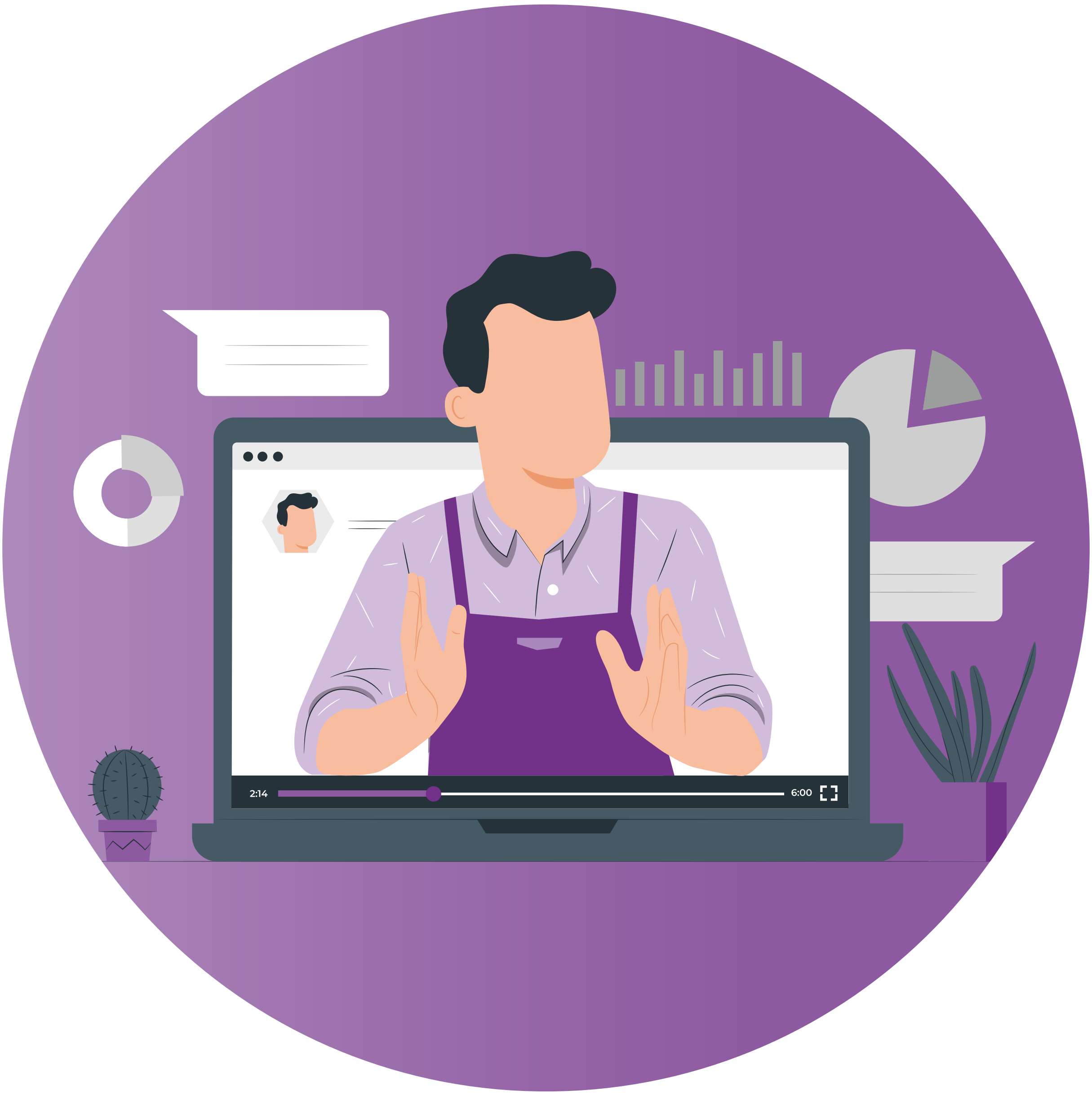
Contributing to Smart Cities projects

Providing housing besides shops

Increasing the value of neighbouring properties

Source: EuroCommerce members

IV The value of European retail



Leveraging digital technologies

A Digital boosts consumer choice

B Digital increases transparency, quality, efficiency, and sustainability

C Digital creates jobs in retail

5

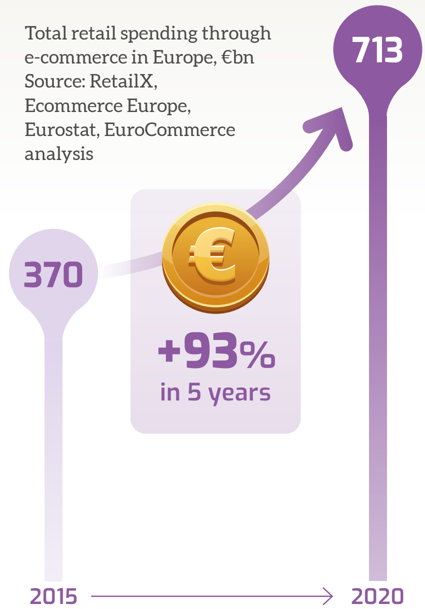
A Digital boosts consumer choice

Consumers are increasingly embracing e-commerce

Share of European adults who have made an online purchase in last 12 months (EU27 + UK, NO, IS, CH)
Source: Eurostat

Increasing online spend

Total retail spending through e-commerce in Europe, €bn
Source: RetailX, Ecommerce Europe, Eurostat, EuroCommerce analysis

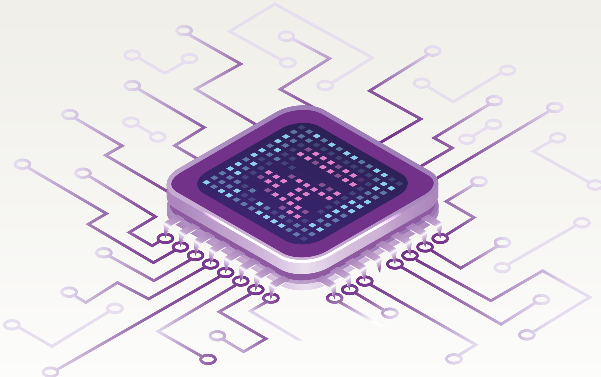


With digital technology, retailers offer combined services online and in-store, boosting choice, experience and convenience

Connecting products with services

Searching, ordering, paying, getting delivered... all seamlessly across channels

Providing access to customers in remote areas and/or with limited mobility



Big data and artificial intelligence help!

Massive investment

Retailers invest massively in new technologies such as artificial intelligence, robotics, process automation, and blockchain.

77%

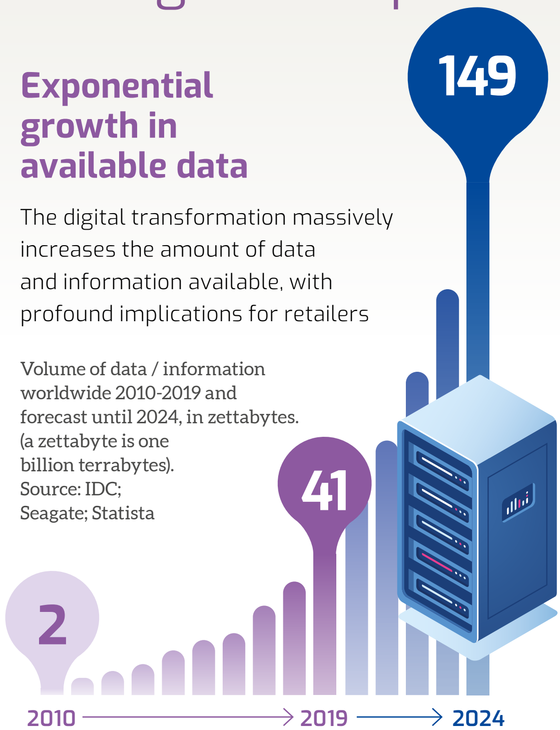
of retailers plan to deploy A.I. by 2021

Source: Gartner

- Retailers and wholesalers invested €140bn in 2018 in AI.
- Retail investment is approximately equal to average profit margin.

Exponential growth in available data

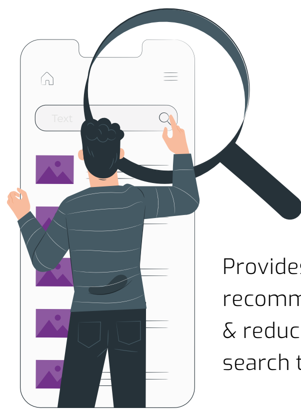
The digital transformation massively increases the amount of data and information available, with profound implications for retailers



Volume of data / information worldwide 2010-2019 and forecast until 2024, in zettabytes. (a zettabyte is one billion terrabytes). Source: IDC; Seagate; Statista

Consumers benefit from big data and AI in retail

Improves and personalises the customer service & experience



Provides recommendations & reduces search time

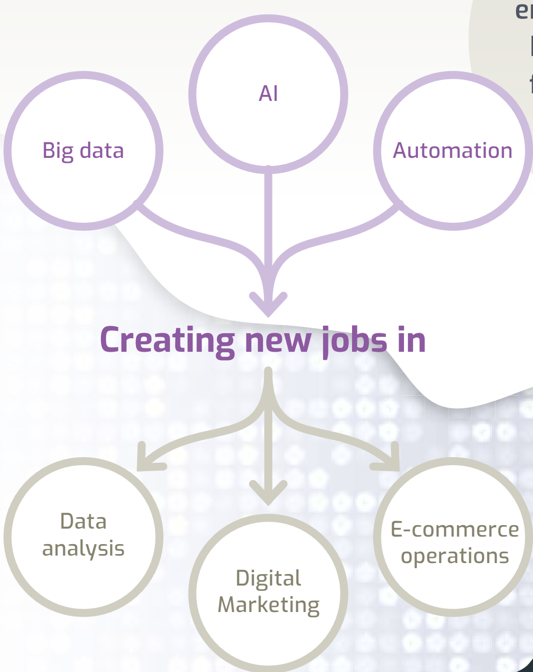
B Digital increases transparency, quality, efficiency, and sustainability

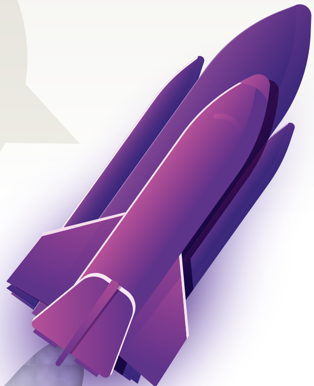
Digital supports information transparency

- Provides more accurate and real-time pricing in stores with digital price tags
- Allows greater product information than on label/package
- Increases access to information (support good choices, recipes, health, etc.)
- Allows easy price comparison

C Digital creates new jobs in retail

Digital is an opportunity to help employees focus on higher value jobs, fulfilling tasks, or customer service.





We adapt to digital technology and invest in reskilling and training.

V Leading European retailers

Top 50 European retailers

Global Retail Sales 2019 (USD bn)

1	Schwarz Group (Lidl-Kaufland)	126,1
2	Aldi	106,3
3	Carrefour	90,5
4	Tesco	81,3
5	Ahold Delhaize	74,2
6	Edeka	61,2
7	Rewe Group	55,8
8	Auchan	51,2
9	E Leclerc	43,4
10	LVMH	41,8
11	IKEA / INGKA	41,6
12	Casino	38,8
13	J Sainsbury	36,3
14	Intermarché Les Mousquetaires	35,4
15	Inditex	31,6
16	X5	26,8
17	Mercadona	26,1
18	Metro AG	25,3
19	Migros	25,0
20	H&M	24,7
21	Groupe Adeo (Leroy Merlin)	24,5
22	Ceconomy (Mediamarkt-Saturn)	24,2
23	Coop Switzerland	23,3
24	Système U	22,9
25	WM Morrisons	22,4
26	Jerónimo Martins (Pingo Doce-Biedronka)	20,9
27	Kingfisher	14,7
28	El Corte Inglés	14,6
29	Conad	14,3
30	Décathlon	13,9
31	Coop Italia	13,5
32	Kering	13,5
33	John Lewis Partnership	13,0
34	Marks and Spencer	12,9
35	Dixons Carphone	12,9
36	Spar Austria	12,4
37	ICA Gruppen	12,2
38	Otto	11,9
39	S Group (SOK)	11,6
40	Dirk Rossmann	11,2
41	Richemont	11,1
42	dm-drogerie markt	10,8
43	NorgesGruppen	10,0
44	ABF / Primark	10,0
45	Coop UK	9,8
46	Signa (Karstadt-Kaufhof-Inno)	9,5
47	Esselunga	9,0
48	Cora-Louis Delhaize	8,9
49	Tengelmann	8,9
50	Colruyt Group	8,8

Note: 1. Several of these retail companies are cooperative structures, group of independent retailers, or franchise organisations, with therefore many small-and-medium sized enterprises underpinning these global leaders. **2.** Only retail companies headquartered in Europe have been listed. For the sake of accuracy, there are a few global retail companies with significant sales in Europe, such as Amazon, Walgreens Boots Alliance, or AS Watson/Hutchison Whampoa. But European sales figures are smaller than in the rest of the world or are unknown.

Source: Global Powers of Retail, 2021 (Deloitte), Company reports (Carrefour)

Top 10 European food retailers

(European sales 2019)

1. Schwarz Group (Lidl, Kaufland) (DE)
2. Aldi (DE)
3. Rewe Group (DE)
4. Tesco (UK)
5. Carrefour (FR)
6. Edeka (DE)
7. Les Mousquetaires (Intermarché) (FR)
8. E. Leclerc (FR)
9. Sainsbury (UK)
10. Auchan (FR)

Top 10 European personal care retailers

(European sales 2019)

1. DM-Drogerie Markt (DE)
2. Walgreens Boots Alliance (US)
3. Dirk Rossmann (DE)
4. A.S. Watson (HK)
5. Müller (DE)
6. Douglas Holding (DE)
7. Sephora (FR)
8. Yves Rocher (FR)
9. Beauty Alliance (DE)
10. The Body Shop (UK)

Top 10 European fashion and clothing retailers

(European sales 2019)

1. Inditex (Zara) (ES)
2. H&M (SE)
3. Primark (UK)
4. LVMH (FR)
5. C&A (NL)
6. M&S (UK)
7. Next (UK)
8. JD Sports (UK)
9. Calzedonia (IT)
10. Arcadia (UK)

Top 10 European DIY / home improvement retailers

(European sales 2019)

1. Groupe Adeo (Leroy Merlin) (FR)
2. Kingfisher (B&Q, Castorama) (UK)
3. Obi (DE)
4. Bauhaus (DE)
5. Hornbach (DE)
6. Les Mousquetaires (Bricomarché) (F)
7. XL-Byg(g) Nordic (DK)
8. Hagebau (DE)
9. Rewe Group (Toom) (DE)
10. Stark Group (DK)

Top 10 European consumer electronics retailers

(European sales 2019)

1. Ceconomy (Mediamarkt Saturn)(DE)
2. Euronics (NL)
3. Expert (CH)
4. Dixons Carphone (UK)
5. Fnac-Darty (FR)
6. Argos (Sainsbury's) (UK)
7. Boulanger (FR)
8. UniEuro (IT)
9. RTV Euro AGD (PL)
10. Electronic Partner (DE)

Top 10 European furniture retailers

(European sales 2019)

1. IKEA (SE)
2. Steinhoff (ZA)
3. XXXLutz (AT)
4. JYSK (DK)
5. Otto (DE)
6. Möbel Höffner (DE)
7. Conforama (FR)
8. BUT (FR)
9. Howdens (UK)
10. Roller (DE)

Note: 1. Several of these retail companies are cooperative structures, group of independent retailers, or franchise organisations, with therefore many small-and-medium sized enterprises underpinning these global leaders. **2.** In contrast to the previous page, companies that are not headquartered in Europe have been listed here, when they are in the top 10 of their categories. **3.** Some data sources, but not the one we have used here, put Amazon in the top 10 for some of those categories.

Source: Retail Index, EDRA

EuroCommerce members (at July 2021)

National associations

Austria	Wirtschaftskammer Österreich (WKÖ)
Belgium	Comeos
Bulgaria	Association of Modern Trade (AMT)
Croatia	Hrvatska Gospodarska Komora (HGK)
	Hrvatska Udruga Poslodavaca (HUP)
Cyprus	Cyprus Chamber of Commerce & Industry (CCCI)
Czech republic	Svaz Obchodu a Cestovniho Ruch Čr (SOCR)
Denmark	Dansk Erhverv
Estonia	Eeste Kaupmeeste Liit (EKL)
Finland	Kaupan Liitto (KL)
France	Conseil du Commerce de France (CDCF)
	Fédération du Commerce et de la Distribution (FCD)
Germany	Bundesverband Grosshandel, Aussenhandel, Dienstleistungen e.V. (BGA)
	Handelsverband Deutschland (HDE)
Greece	Hellenic Confederation of Commerce and Entrepreneurship (ESEE)
Hungary	Orszagos Kereskedelmi Szövetseg (OKSZ)
	Vállalkozók És Munkáltatók Országos Szövetsége (VOSZ)
Iceland	Icelandic chamber of trade (SVTH)
Ireland	Retail Ireland
Italy	Federdistribuzione
Lithuania	Lietuvos prekybos įmonių asociacija (LPĮA)
Luxembourg	Confédération Luxembourgeoise du Commerce (CLC)
Malta	Malta Chamber of SMEs
Netherlands	MKB Nederland
	Raad Voor Nederlandse DetailhandeL (RND)
Norway	VIRKE
Poland	Polską Organizacją Handlu i Dystrybucji (POHID)
Portugal	Confederação do Comércio e Serviços de Portugal (CCP)
	Associação Portuguesa de Empresas de Distribuição (APED)
Romania	Asociația Marilor Rețele Comerciale din România (AMRCR)
Slovakia	Slovak Association of Modern Trade (SAMO)
Slovenia	Trgovinska zbornica Slovenije (TZS)
Spain	Asociación Nacional Grandes de Empresas de Distribución (ANGED)
	Asociación de Empresas de Supermercados (ASEDAS)
	Asociación Supermercados (ACES)
Sweden	Svensk Handel

Companies

Ahold Delhaize
amazon
Auchan RETAIL
A.S. Watson Group
CECONOMY
COLRUYT GROUP
coop
DECATHLON
EDEKA Stiftung
El Corte Inglés
ESSELUNGA
HERBALIFE NUTRITION
ifa
IKEA
INDITEX
Jerónimo Martins
K
kappé international
SCHWARZ
LIDL
Kaufland
Kingfisher
markant
MERCADONA
METRO
Musgrave
PRIMARK
REWE GROUP
SONAE
SPAR
TESCO
Walgreens Boots Alliance

Affiliated associations and federations

CBL centraal bureau levensmiddelenhandel
SVENSK DAGLIG VARU HANDEL
dse direct selling europe
ECOMMERCE EUROPE
EDRA
etrc
etu
EuCER Council
EUEW
Fecc EUROPEAN ASSOCIATION OF CHEMICAL DISTRIBUTORS
GIRP
seldia The European Direct Selling Association

EuroCommerce is the principal European organisation representing the retail and wholesale sector.

It embraces national associations in 28 countries and 5 million companies, both leading global players such as Carrefour, Ikea, Metro and Tesco, and many small businesses. Retail and wholesale is the link between producers and consumers. Over a billion times a day, retailers and wholesalers distribute goods and provide an essential service to millions of business and individual customers. The sector generates 1 in 7 jobs, offering a varied career to 26 million Europeans, many of them young people. It also supports millions of further jobs throughout the supply chain, from small local suppliers to international businesses. EuroCommerce is the recognised European social partner for the retail and wholesale sector.

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