Press release

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Twenty districts responsible for one-fourth of Germany's stationary retail turnover

GfK's 2018 regional retail turnover prognosis

Bruchsal, February 27, 2018 – GfK's latest prognosis of regional retail turnover in 2018 shows promising conditions for retail locations not just in Germany's most populous metropolises, but also in several mid-sized cities.

GfK's study "GfK Retail Turnover 2018" forecasts a 2018 turnover volume of €419.7 bil. for Germany's stationary retail trade. This equates to a slight nominal increase of one percent compared to the previous year.

Many factors impact whether more money in real terms is available to retail. Industry-specific challenges such as trends in commodity and wholesale prices and especially the growth of online trade play an important role in this regard.

Regional distribution of turnover in Germany

As expected, Germany's most populous districts generate the highest retail turnover. Metropolitan areas such as Berlin, Hamburg and Munich far outpace Germany's other districts in terms of total retail turnover. With more than three million inhabitants, Germany's capital Berlin has a retail turnover of €18.7 bil., which equates to 4.46 percent of the country's total retail turnover. Hamburg has a retail turnover of €11.4 bil. (2.73%), and Munich has €11.1 bil. (2.64%). Urban districts such as Frankfurt, Stuttgart and Düsseldorf each have one percent of Germany's total retail turnover.

Top 20 districts for total retail turnover

ranking	urban district (UD) / rural district (RD)	inhabitants	retail turnover in mil. €	share of total stationary retail turnover
1	Berlin UD	3,550,948	18,712.6	4.46%
2	Hamburg UD	1,798,654	11,440.5	2.73%
3	Munich UD	1,452,826	11,098.7	2.64%
4	Cologne UD	1,070,357	7,234.6	1.72%
5	Hannover region	1,146,225	6,698.4	1.60%
6	Frankfurt am Main UD	731,009	4,430.0	1.06%
7	Stuttgart UD	626,144	4,232.2	1.01%
8	Düsseldorf UD	611,302	4,221.5	1.01%
9	Nuremberg UD	510,405	3,571.1	0.85%
10	Dortmund UD	585,352	3,499.4	0.83%
11	Essen UD	583,768	3,360.2	0.80%
12	Bremen UD	563,257	3,201.5	0.76%
13	Recklinghausen RD	617,364	3,148.5	0.75%
14	Aachen city region	550,261	3,034.8	0.72%
15	Dresden UD	543,501	3,007.3	0.72%
16	Rhein-Sieg-Kreis RD	597,475	2,813.4	0.67%
17	Leipzig UD	564,305	2,756.9	0.66%
18	Mettmann UD	483,581	2,584.5	0.62%
19	Rhein-Neckar-Kreis RD	543,889	2,516.9	0.60%
20	Ludwigsburg RD	536,480	2,504.2	0.60%

source: GfK Retail Turnover Germany 2018; UD = urban district; RD = rural district

Germany's top ten districts comprise almost 18 percent of the nation's total stationary retail turnover, while the top 20 districts comprise approximately one-fourth. Once they achieve a certain critical mass, retail locations attract consumers from further afield due to a larger selection, opportunities to find good deals and an appealing shopping atmosphere. But these retail hotspots also have the most competition and highest rent levels, if there are suitable vacancies at all.

Given this, smaller locations can represent important growth opportunities for expansion-oriented retailers. Mid-sized cities that supply the surrounding area with goods and services can command per-capita retail turnover values twice that of the national average. This is the case in 2018 for the urban districts of Würzburg, Passau and Straubing, which lead the district rankings for per-capita turnover potential. With the exception of the urban district of Trier, the top ten spots are all held by

Bavarian urban districts. But compared to the country's large metropolises, these districts have much lower total retail turnover volumes due to the smaller number of inhabitants.

The highest-ranking city with more than 300,000 inhabitants in the per-capita turnover rankings is the urban district of Mannheim in twentieth place. This location has a per-capita turnover that is 1.5 times the national average. With a forecasted total retail turnover volume of approximately €2.4 bil., Mannheim ranks twenty-first in the volume-based rankings, which puts it just behind Ludwigsburg, a rural district with more than 500,000 inhabitants.

Top 20 districts for per-capita retail turnover

index ranking	urban district (UD) / rural district (RD)	inhabitants	retail turnover in mil. €	retail turnover index
1	Würzburg UD	125,514	1,307.0	204.4
2	Passau UD	50,578	519.6	201.6
3	Straubing UD	46,727	472.1	198.3
4	Weiden i.d.OPf. UD	42,369	410.4	190.1
5	Schweinfurt UD	52,398	502.2	188.1
6	Trier UD	109,197	1,045.4	187.9
7	Rosenheim UD	62,108	581.4	183.7
8	Kempten (Allgäu) UD	67,028	602.1	176.3
9	Ingolstadt UD	132,545	1,182.2	175.0
10	Landshut UD	69,641	617.9	174.1
11	Regensburg UD	147,011	1,276.2	170.4
12	Zweibrücken UD	34,534	298.4	169.6
13	Koblenz UD	113,384	975.0	168.8
14	Flensburg UD	86,556	717.2	162.6
15	Hof UD	44,580	362.3	159.5
16	Aschaffenburg UD	69,080	560.0	159.1
17	Heilbronn UD	123,105	997.8	159.1
18	Memmingen UD	43,095	341.6	155.6
19	Kaiserslautern UD	98,894	775.9	154.0
20	Mannheim UD	304,362	2,369.9	152.8

GfK Retail Turnover Germany 2018; UD = urban district; RD = rural district; per-capita index (100 = national average)

Note: The per-capita values represent a purely mathematical benchmark, because retail at the respective locations is by no means driven only by local inhabitants. Insight into the drawing power of the regions in question can be gained by correlating retail turnover with population size.

About the study

GfK Retail Turnover shows the regional distribution of stationary retail turnover. In contrast to GfK Purchasing Power, which is calculated at consumers' places of residence, GfK Retail Turnover refers to points of sale. The retail turnover values exclude automobile and fuel sales as well as online and mail-order trade.

GfK annually calculates GfK Retail Turnover for every regional level as a total volume as well as per inhabitant in euros and as an index (German average = 100). These calculations are carried out for all of Germany's urban and rural districts, postcodes and municipalities with more than 10,000 inhabitants.

The study "GfK Retail Turnover" is also available for many other European countries.

Additional information on GfK's regional market data can be found here.

Print-quality illustrations can be found here.

About GfK

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