

# Geomarketing News

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**Thomas Muranyi**  
Public Relations  
T +49 7251 9295 280  
[thomas.muranyi@gfk.com](mailto:thomas.muranyi@gfk.com)

## Germany's brick-and-mortar retail turnover to grow by €3.4 bil. in 2019

### GfK's regional retail turnover prognosis

**Bruchsal, Germany, February 20, 2019 – GfK forecasts a slight nominal growth of 0.8 percent for Germany's brick-and-mortar retail turnover in 2019. In addition to Germany's largest cities, several mid-sized cities offer favorable retail conditions with high turnover potential.**

GfK's study "GfK Retail Turnover 2019" forecasts a turnover volume of €423.1 bil. for Germany's brick-and-mortar retail in 2019. Compared to the previous year, GfK anticipates a rise in retail turnover of €3.4 bil., which corresponds to a slight nominal increase of 0.8 percent.

### Germany's regional distribution of turnover

Brick-and-mortar retail turnover is most concentrated in Germany's districts with the largest populations. The top spots go to the metropolises of Berlin, Hamburg and Munich: Germany's capital is the undisputed frontrunner with a retail turnover of more than €18.9 bil., which equates to 4.48 percent of the country's total retail turnover. Hamburg places second with a retail turnover of €11.5 bil. (2.71 percent), followed by Munich with €11.1 bil. (2.62 percent). Fourth and fifth places go to the urban district of Cologne (1.70 percent) and the Hannover region (1.59 percent), while the urban districts of Frankfurt, Stuttgart and Düsseldorf each have approximately one percent of Germany's total retail turnover.

GfK GeoMarketing GmbH  
[www.gfk.com/geomarketing](http://www.gfk.com/geomarketing)  
[geomarketing@gfk.com](mailto:geomarketing@gfk.com)

Bruchsal branch:  
Werner-von-Siemens-Str. 9  
Building 6508  
76646 Bruchsal, Germany  
T +49 7251 9295100  
F +49 7251 9295290

Hamburg branch:  
Herrengaben 5  
20459 Hamburg, Germany

Nuremberg branch:  
Nordwestring 101  
90419 Nuremberg, Germany

Management Board  
Friedrich Fleischmann

Amtsgericht Mannheim  
HRB 250872  
Ust-ID: DE 143585033

## Top 20 districts for total retail turnover

turnover ranking	urban district (UD) / rural district (RD)	inhabitants	retail turnover in mil. €	share of total brick-and-mortar retail turnover
1	Berlin UD	3,613,495	18,938.9	4.48%
2	Hamburg UD	1,830,584	11,470.5	2.71%
3	Munich UD	1,456,039	11,106.1	2.62%
4	Cologne UD	1,080,394	7,202.3	1.70%
5	Hannover region	1,152,675	6,709.6	1.59%
6	Frankfurt am Main UD	746,878	4,461.2	1.05%
7	Stuttgart UD	632,743	4,232.8	1.00%
8	Düsseldorf UD	617,280	4,216.0	1.00%
9	Nuremberg UD	515,201	3,564.2	0.84%
10	Dortmund UD	586,600	3,442.0	0.81%
11	Essen UD	583,393	3,383.1	0.80%
12	Bremen UD	568,006	3,204.7	0.76%
13	Recklinghausen RD	616,824	3,152.7	0.75%
14	Aachen city region	554,068	3,090.5	0.73%
15	Dresden UD	551,072	3,043.8	0.72%
16	Rhine-Sieg-Kreis RD	599,056	2,846.4	0.67%
17	Leipzig UD	581,980	2,776.6	0.66%
18	Mettmann RD	485,409	2,621.2	0.62%
19	Rhine-Neckar-Kreis RD	546,745	2,571.9	0.61%
20	Ludwigsburg RD	542,630	2,555.9	0.60%

source: GfK Retail Turnover Germany 2019; UD = urban district; RD = rural district

Germany's top 20 districts comprise one-fourth of the nation's total brick-and-mortar retail turnover, while the top 10 districts alone make up almost 18 percent. The stronger a retail location, the greater its ability to draw consumers. When choosing where to shop, consumers seek a large selection, opportunities to find good deals and an appealing urban retail experience. But such retail hotspots frequently have fierce competition, leading to a surplus offering for certain segments and target groups. Rent levels are also often very high, assuming suitable spaces can be found at all.

Given these factors, smaller cities are of ever greater importance to expansion-oriented retailers. Mid-sized cities with a wide range of services and administrative functions for the surrounding area can command per capita retail turnover volumes twice that of the national average (€5,110). Such is the case for the urban districts of Würzburg, Passau and Straubing, which lead the district rankings

for per capita turnover potential in 2019. With a per capita retail turnover 1.5 times the national average, the urban district of Mannheim – a large city with more than 300,000 inhabitants – also places among the top 20 districts.

### 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	126,635	1,303.3	201.4
2	Passau UD	51,781	518.8	196.1
3	Straubing UD	47,586	473.3	194.6
4	Weiden i.d.OPf. UD	42,543	404.6	186.1
5	Trier UD	110,013	1,043.1	185.5
6	Schweinfurt UD	53,437	501.3	183.6
7	Rosenheim UD	63,080	576.6	178.9
8	Ingolstadt UD	135,244	1,205.6	174.4
9	Kempten (Allgäu) UD	68,330	597.9	171.2
10	Zweibrücken UD	34,270	299.8	171.2
11	Koblenz UD	113,844	989.7	170.1
12	Landshut UD	71,193	614.4	168.9
13	Regensburg UD	150,894	1,284.8	166.6
14	Heilbronn UD	125,113	1,022.7	160.0
15	Flensburg UD	88,519	722.2	159.6
16	Memmingen UD	43,470	349.7	157.4
17	Aschaffenburg UD	69,928	558.2	156.2
18	Hof UD	45,950	363.0	154.6
19	Kaiserslautern UD	99,684	785.2	154.1
20	Mannheim UD	307,997	2,375.9	151.0

source: GfK Retail Turnover Germany 2019; UD = urban district; RD = rural district; 100 = national average

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

## **About the study**

GfK Retail Turnover reveals the regional distribution of brick-and-mortar retail turnover. In contrast to GfK Purchasing Power, which is calculated at consumers' places of residence, GfK Retail Turnover is calculated at the 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 value and per capita value 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 accessed [here](#).

**Print-quality illustrations** can be found [here](#).

## **About GfK**

GfK connects data and science. Innovative research solutions provide answers for key business questions around consumers, markets, brands and media – now and in the future. As a research and analytics partner, GfK promises its clients all over the world “Growth from Knowledge”.

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