

# Geomarketing News

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## Germany's brick-and-mortar retail turnover to grow by 1.3 percent in 2020

### GfK's regional retail turnover prognosis for 2020

**Bruchsal, Germany, February 27, 2020 – GfK forecasts growth of €5.5 bil. in Germany's brick-and-mortar retail trade in 2020. Populous cities such as Berlin, Hamburg and Munich are the forerunners in terms of the most retail turnover generated, but many mid-sized cities with a wide range of services and administrative functions for the surrounding area also offer favorable retail conditions.**

GfK's new study "GfK Retail Turnover 2020" anticipates a turnover volume of €428.6 bil. for Germany's brick-and-mortar retail trade in 2020. Compared to the previous year, GfK expects a retail turnover increase of €5.5 bil., which corresponds to a nominal increase of 1.3 percent.

### Germany's regional distribution of turnover

Germany's most populous districts lead the way with regard to retail turnover: The country's capital takes first place by a wide margin in the retail turnover (mil. €) district rankings: Berlin is responsible for almost €19.5 bil. of the country's brick-and-mortar retail turnover, which corresponds to 4.54 percent of Germany's total retail turnover. As in the previous year, second through sixth places go to Hamburg (2.71%), Munich (2.63%), Cologne (1.70%), Hannover (1.58%) and Frankfurt am Main (1.06%), respectively.

But there has been a change in this year's top ten line-up: Düsseldorf and Stuttgart switch places in the rankings, with Düsseldorf taking the lead. Each of these cities is responsible for around one percent of Germany's total brick-and-mortar retail turnover. The top ten districts together generate 17.86 percent of Germany's total brick-and-mortar retail turnover.

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## Top 10 districts for total retail turnover

turnover ranking	urban district (UD) / rural district (RD)	inhabitants	retail turnover in mil. €	share as a % of total brick-and-mortar retail turnover
1	Berlin UD	3,644,826	19,454.9	4.54%
2	Hamburg UD	1,841,179	11,614.6	2.71%
3	Munich UD	1,471,508	11,258.1	2.63%
4	Cologne UD	1,085,664	7,271.0	1.70%
5	Hannover region	1,157,624	6,760.0	1.58%
6	Frankfurt am Main UD	753,056	4,538.2	1.06%
7	Düsseldorf UD	619,294	4,301.0	1.00%
8	Stuttgart UD	634,830	4,260.9	0.99%
9	Nuremberg UD	518,365	3,595.8	0.84%
10	Dortmund UD	587,010	3,483.0	0.81%

source: GfK Retail Turnover Germany 2020; UD = urban district; RD = rural district

Strong retail locations draw consumers seeking a large retail selection, good bargains and an enjoyable urban shopping experience. In this respect, large cities can offer optimal conditions for positioning brands thanks to high demand and turnover volume. But such retail hotspots frequently have fierce competition, leading to a surplus offering for certain industries and target groups. The competition for retail real estate is also highest in these areas.

As a result, somewhat smaller cities continue to grow in importance for retailers interested in optimizing or expanding their networks. Mid-sized cities that offer a variety of services for the surrounding region enjoy per capita turnover volumes almost twice that of the current national average of €5,163. Such is the case for the urban district of Würzburg, which again takes first place in the district rankings for per capita retail turnover, followed by the urban districts of Straubing and Passau. The urban district of Zweibrücken moves up three spots to seventh place with a per capita retail turnover that is more than 76 percent higher than national average.

### Top 10 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	127,880	1,309.0	198.3
2	Straubing UD	47,794	464.9	188.4
3	Passau UD	52,469	509.8	188.2
4	Trier UD	110,636	1,045.2	183.0
5	Weiden i.d.OPf. UD	42,520	399.8	182,1
6	Schweinfurt UD	54,032	494.8	177.4
7	Zweibrücken UD	34,209	311.2	176.2
8	Ingolstadt UD	136,981	1,244.2	175.9
9	Rosenheim UD	63,324	566.9	173.4
10	Koblenz UD	114,024	998.5	169.6

source: GfK Retail Turnover Germany 2020; 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 transacted 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 total and per capita values in euros and as an index (German average = 100). These calculations have been carried out for all of Germany's urban and rural districts as well as municipalities and postcodes with a retail turnover of at least €1.5 mil. and more than three retail businesses.

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](#).

**GfK – extracting the signals from the noise**

In a world of data overflow, disruption and misuse, picking up the right “signal from noise” is key to win. We at GfK are the trusted partner with more than 85 years of experience in combining data and science to help you make the right business decisions. Together with our attention to detail and advanced Augmented Intelligence, we provide you with world-class analytics that delivers not just descriptive data but actionable recommendations always-on at your fingertips. As a result, you can make key business decisions with confidence which help you drive sales, organizational and marketing effectiveness. That’s why we promise to you “Growth from Knowledge”. For more information, please visit [www.gfk.com](http://www.gfk.com) or follow GfK on Twitter [www.twitter.com/GfK](https://www.twitter.com/GfK).