GERMAN GROCERY DISCOUNTERS: DYNAMICS AND REGIONAL IMPACT. THE CASE OF SCHLESWIG-HOLSTEIN (GERMANY)

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Abstract: Grocery discount stores have long dominated developments in the German food retail sector, and they continue to grow. This paper discusses the reasons for this long-term success based on internal decision-making parameters such as price, adjustment of product range, choice of location, and size of new stores. The result is significant customer acceptance, but also adverse developments viewed critically in various governance constellations. The paper is based on expert interviews and a comprehensive collection of data on grocery discount stores and supermarkets in the German federal state of Schleswig-Holstein.

Key words: retailing, German grocery discounters, cluster development, regional planning, governance

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Introduction and objectives

The retail sector is subject to an inherent dynamics that results in perpetual adaptation processes vis-à-vis competitors, customer needs, technological development, and institutional conditions. This gives rise to new operation forms, changing operating variables and changing strategies for achieving an optimal mix of operating forms or locations that might have been completely unheard of, or at least under-appreciated, in the past. Working on the thesis that this seemingly chaotic image of store openings and closures, of price and product range adjustments, opening times, adaptations to customer trends, lifestyles and mobility is subject to a systematic logic, McNair (1931, 1958; Hollander 1960) developed the theory of a "wheel of retailing" analogous to Nieschlag's (1954) 'laws' on the "dynamics of business forms". These 'laws' state that retail business forms are subject to a lifecycle that extends from a phase of innovation and surprise to a phase of maturity, and subsequently to decline and death. The goal of retailers must be to forestall the phase of decline as long as possible using all the means available to them, be it by always creating (their own) mini-innovations or by imitating the success strategies of competitors. This approach clearly addresses first the so-called internal factors of any operating form (price structure, size of assortment, positioning of services, choice of location), which are relatively autonomous and can be changed relatively quickly. So-called external factors (always seen in relationship to internal factors), be they demographic changes, purchasing power development or institutional and planning guidelines, can only be influenced in the long term – if at all – by a single competitor. Agergard et al. (1970) demonstrate these relationships in their "spiral theory" of retailing. They ask to what degree economic trends toward rationalisation, standardisation, increased size and increased cost-effectivity have an impact on attractiveness to customers, often driven by opposing trends of individualisation, lifestyle differentiation and convenience. To what extent do product and spatial niches emerge for new operation forms in a web of ageing and ever-growing providers of goods and services? Other authors see the spatial combination with other providers and operation forms as a chance to increase customer appeal by means of coupling (Brown 1993: 191 ff.; Hotelling 1929; Nelson 1958).

What do these considerations mean for one of the most dynamic operation forms in the German retail sector – for grocery discount stores, a successful model increasingly exported to other European countries, North America and Australia? While the discount store concept can also be applied to products such as shoes, textiles or hygiene items, it is above all the over 15,000 grocery discount stores that increasingly define the everyday shopping experience in Germany. The oligopolistic structure of six major chains (Aldi, Lidl, Netto Markendiscount, Penny, NettoDansk and Norma) today has a significant impact on consumption patterns, their architecturally standardised stores make urban and rural neighbourhoods virtually interchangeable. The neologism 'Aldi-fication' (German *Aldisierung*) reveals the degree to which the discount store has become part of the social mainstream and the place the idea has in consumer psychology. 'Aldi-fication' has become a huge trend extending to all forms of consumption, mainly in terms of a relentless search for low prices, often mutating into virtual quests for the greatest savings and price comparison, and in turn to forms of (cheap) production and (cheap) labour. Especially at a time when purchasing power in Germany tends to be seen as shrinking due to high taxes and high costs of living and mobility, grocery discount stores have become the first alternative in terms of fulfilling basic needs. This does not mean that the economic success of the discount stores is ensured over long periods of time. Repeatedly, 'surprises' have been needed in order to prevail over other retail formats, such as supermarkets with their own discount brands. A central question for this analysis has thus been how grocery discount stores have changed over time. How far are other business models no longer perceived as competitors but as partners? What is the public opinion on discounters (as represented in the media, in local politics and among civil society), and what role does this play in the identification of strengths and weaknesses, potential for and risks to expansion?

State of research

Let us briefly define the concept of the discount store, which, historically, is – with all due prudence – a German 'invention'. The stores are characterised by low prices, segments of different size dominated by their own labels, standardised store structure and interior design, a limited number of product lines, 'simple' product presentation and minimal service, dense promotion, high visibility, and high recognition. Aldi is one of the best known brands in Germany. As a rule, stores are of medium-size, ranging from 500 to 1,000 square metres of retail space, increasingly accompanied by large car parks that enhance the value of urban and rural areas characterised by Augé as "non-places" (Augé 2012).

The discount phenomenon has been poorly studied considering its size and significance. While German grocery discount stores have been on the market for almost 50 years and have dramatically grown in number over the last 20 years, very little has been published on the subject during this time that goes beyond simple narratives to examine empirically and systematically customer structures, location choices, or effects on competitors. This has much to do with the extreme discretion of the families that own the discount store chains (Gerhard, Hahn 2005; Acker 2010; Jürgens 2011). What has been published is often rather a characterisation of marketing specifics or contributions to a developing cult status for individual competitors. These timeless and placeless considerations certainly do not meet the criteria of a critical social analysis of the consequences of the 'Aldi-fication' of society (Brandes 2001). Other studies have tried to approach the discount store phenomenon on the basis of economic models, but they remain particularist in their argumentation and in their Popperian tradition of hypotheses and their verification (e.g. Deleersnyder et al. 2007; Schmitz 2009; Morschett et al. 2005; Esbjerg et al. 2012; Nesset et al. 2011). Spatio-temporal approaches, such as Agergard's et al. (1970) "spiral theory", have remained largely unnoticed (e.g. Brown 1993, 1994 does not cite them, as opposed to Kulke 1992). Newer perspectives, such as governance or language-related methods that could complement traditional quantitative approaches, are only slowly making headway in the research on the retail industry (Fuchs, Kalfagianni 2009; Jürgens 2012a; Otnes et al. 2012; Messeghem, Fourquet-Courbet 2013). They allow an extension of the scope for defining economic success to previously neglected stakeholder groups (beyond supplier, customer and producer) and subjective positions (i.e. media discourses).

Methodology

This paper is based on studies conducted in Schleswig-Holstein, Germany's northernmost state, in the years 2011 and 2012. In a multistage process, all discount stores in the state were identified and analysed by means of GIS processes on the basis of spatial and other geo-demographic criteria. Systematic address lists from the Nielsen Company (Nielsen Company 2011) of all discount stores and supermarkets and official demographic data made it possible to identify size and organisation patterns of discounters and supermarkets. The analysis of the public perception of discounter markets was based on a survey of local newspapers and Internet blogs as well as on interviews with representatives of the retail industry, public administration officials, real estate specialists, and citizen groups in selected communities (Jürgens 2012a) in an attempt to identify arguments for and against the opening of discount stores. Representatives of the various discount store chains themselves never consented to an interview.

'Internal' parameters of success: competition in the discount store

In the recent years, a variety of internal changes have characterised the grocery discounter market that are witnesses to their attempts to address new social developments such as 'moralisation' (green/fair trade concepts, regionalisation of goods), an ageing population, individualisation and the ethnic diversification of the customer base. Their product range has increased significantly in size from the original few hundred to a few thousand in the so-called soft discounters. The variation in package size, the mix of house brands and brand-name products, long-storage items and fresh produce, basic and convenience goods, food and non-food, certified and ethnic foods, have contributed to the once small stores having virtually doubled in size over the last decade (Fig. 1). In extreme cases the stores have reached a size of more than 1,500 square metres of retail space. The chance that customers can meet all shopping needs in one discount store has grown significantly. The revenue share of discounters for so-called fast moving consumer goods increased by 16.6% between 2006 and 2011. By comparison, in the so-called small supermarkets with less than 400 square metres of retail space, this percentage dropped by one-third (Metro 2012: 37). Between 2005 and 2011 the number of independent bakeries in Germany shrank by almost 2,600 to 14,170 businesses (http://www.baeckerhandwerk.de/baecker-handwerk/zahlen-fakten/ (2 May 2013), which can also be attributed to the establishment of so-called baking stations in grocery discounters.

In general, these larger discount chains are no longer able to find rental space in more central, built-up locations that meet the requirements of their standardised demands. Thus, they turn increasingly to establishing their stores in peri-urban locations, on arterial roads, or in commercial parks. Free parking, automated machines for returning bottles, and the chance to buy, as 'smart shoppers', promotional goods of limited availability help the discounters to fascinate customers and draw them to parts of town that were once perceived as peripheral (at least during shopping hours). This attraction is further precipitated by the fact that retailers who once acted 'individually' in their decision-making have developed strategic regional partnerships in which they couple the forces of their own niche markets with those of their competitors. Increasingly, grocery discounters and supermarkets combine the limits of a discounter product range of ca. 1,000 items with the 'unlimited' range of more than 10,000 products that might be found in a supermarket. Figure 2 shows, on the basis of the Aldi (discount store) and Edeka (supermarket) chains, the extent to which this phenomenon has spread. Often this store combination is accompanied by a textile discount store or a beverage market, so that suddenly a shopping cluster emerges in the middle of nowhere. Another model for increasing the range of products and the appeal and acceptance of a discount store is to offer seasonal and regional fresh produce by providing space to local and mobile direct marketers, who will even be courted by the discounter if they do not take the initiative themselves (Jürgens 2013: 54). The development of a reputation beyond the simple criteria of price, that is, images of 'trust', 'locality', 'home', 'origin', of transparency of goods and production chains, are becoming increasingly important for discounters as well, in response to (often never asked) questions of 'enlightened' and ethically-minded customers.

The virtual synchronicity of success and 'failure' of the discount idea is documented in the headlines of major daily and specialty newspapers (Table 1) that on the one hand reflect the general criticism of discounters in terms of the quality of

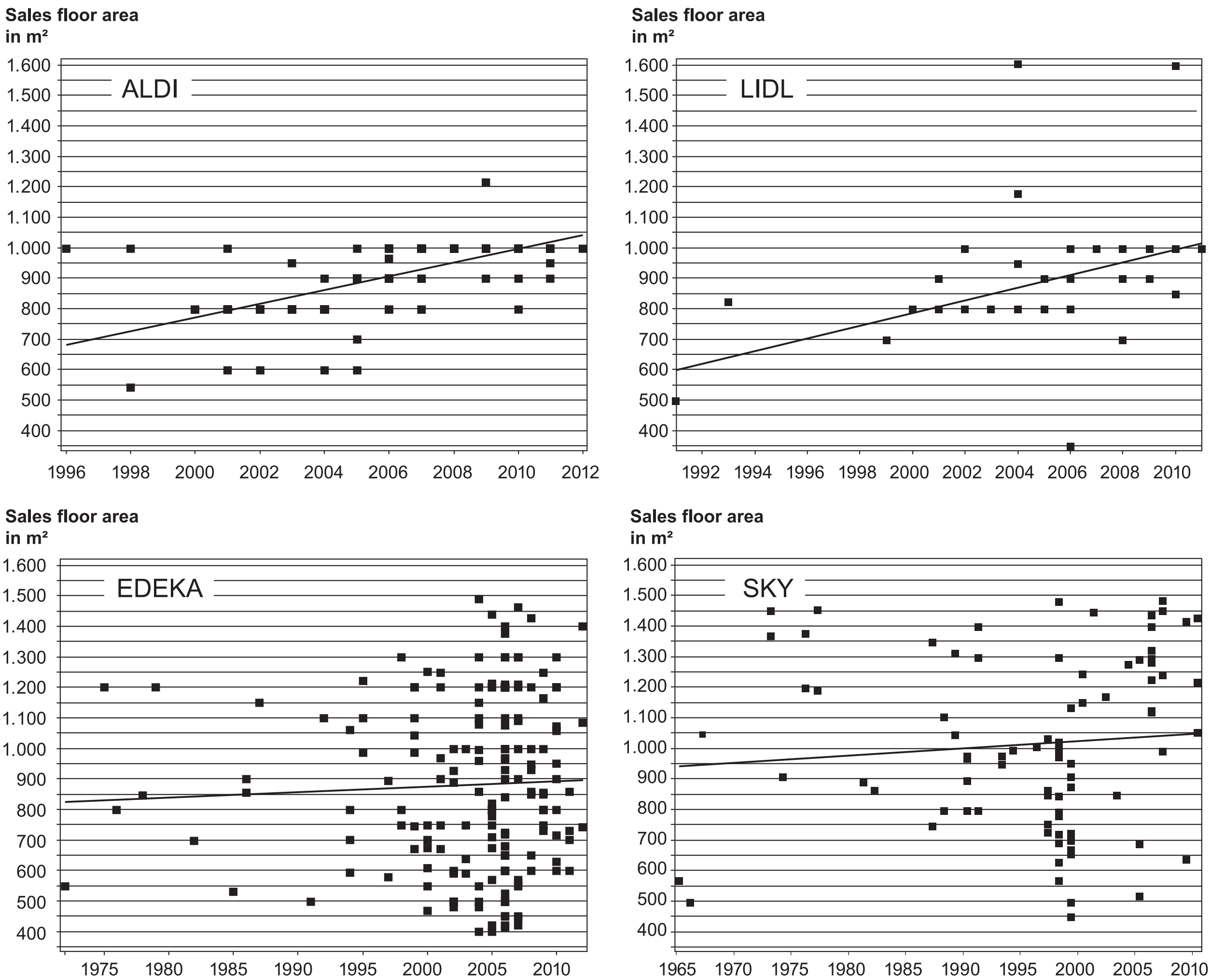

Fig. 1. Dynamics of the sales floor area in German discounter and supermarket chains in the province of Schleswig-Holstein, Germany.
Source: Nielsen Company 2011, own calculations by ArcView10.

Fig. 2a–c. Distribution of Aldi-discounter and Edeka-supermarket branches and their strategic cluster development (max. distance 150 m), the province of Schleswig-Holstein, Germany.
Source: Nielsen Company 2011, content prepared by S. Schnitker (GIS), cartographic elaboration by P. Sinuraya.

the products they sell, and on the other contribute to the 'cult' status of this retail model. The density of the store network also plays a role, as shown in Figure 3. Grocery discount stores exist in such a close network that more than 95% of all Germans shop there more or less regularly. The dominance of discounters in the urban space makes the opposite trend in rural areas all the more apparent. Where local absolute purchasing power necessary for the establishment of a discount store is not sufficient, the distances that need to be travelled to meet basic needs are many times longer than in urban areas (Fig. 4). Alternative village grocery concepts have been created in order to ensure that basic needs are met in peripheral rural areas. But unless discount store-supermarket clusters radiate into these rural regions, they will be doomed to loose their last local markets. In 2011, 585 discount grocers were concentrated in only 155 municipalities (out of a total of 1,126). Nearly 550,000 people in Schleswig-Holstein lived in municipalities with neither a discount store nor a 'major' supermarket (of a total of ca. 2.8 million inhabitants in the province of Schleswig-Holstein) (Jürgens 2012b: 38).

An all-too-rarely-used source for examining how such phenomena and developments are perceived is comments in newspaper blogs, five examples of which are presented here (Table 2). Several lines of reasoning can be distinguished: (a) the stabilising role of discount stores in times of crisis, 'stress' and low income, where discounters are recognised as pragmatic, effective and, all things considered, without alternative; (b) does

Table 1. Grocery discounters in the news (specialty and local media).

Nutella is just the beginning – Top brands in Aldi	LZ 22 June 12
Aigner: Discount jeopardises the reputation of German products	Die Welt 12 May 12
In the Aldi laboratory. The new Aldi market model	SZ 24 April 12
Traditional bakery fights the discounters	Die Welt 17 April 12
Discounter raises prices	LZ 13 Feb. 12
GfK: Discounters will not gain anything	LZ 05 Jan. 12
Discounters sit on their non-food	LZ 01 Dec. 12
The discounters lose sympathy	LZ 16 Sept. 11
Discounters dominate the fish market	LZ 09 Sept. 11
Discounters lure customers with baking stations	LZ 08 July 11
Discounts earn points with their shopping experience	LZ 27 Oct. 10
Discounters lose for the first time	LZ 11 Aug. 10
Discounters enter a marriage of convenience	LZ 01 Oct. 10
Run on discounters	SZ 18 June 08
Price explosion in the discount stores	SZ 06 Sept. 07
Shopping spree at the discounter	SZ 15 July 07
Discount is becoming socially acceptable	LZ 15 Sept. 05

Source: headlines in "Lebensmittelzeitung" (LZ), "Süddeutsche Zeitung" (SZ) and "Die Welt".

shopping always have to be 'fun'? What 'added value' must shopping have in terms of atmosphere, comfort and sensuality? Rationality is defined by one commentator as 'unattractive'. For another, the rationality of the discounter is understood as 'stone-age directness', as an opportunity to escape the marketing dictate of 'attractiveness' ("Süddeutsche Zeitung", 27 Feb. 1999); and (c) the discounter is 'excused' for its incomplete product palette and lack of 'inspiration.' One comes back, and identifies competitors only as complementary providers of goods.

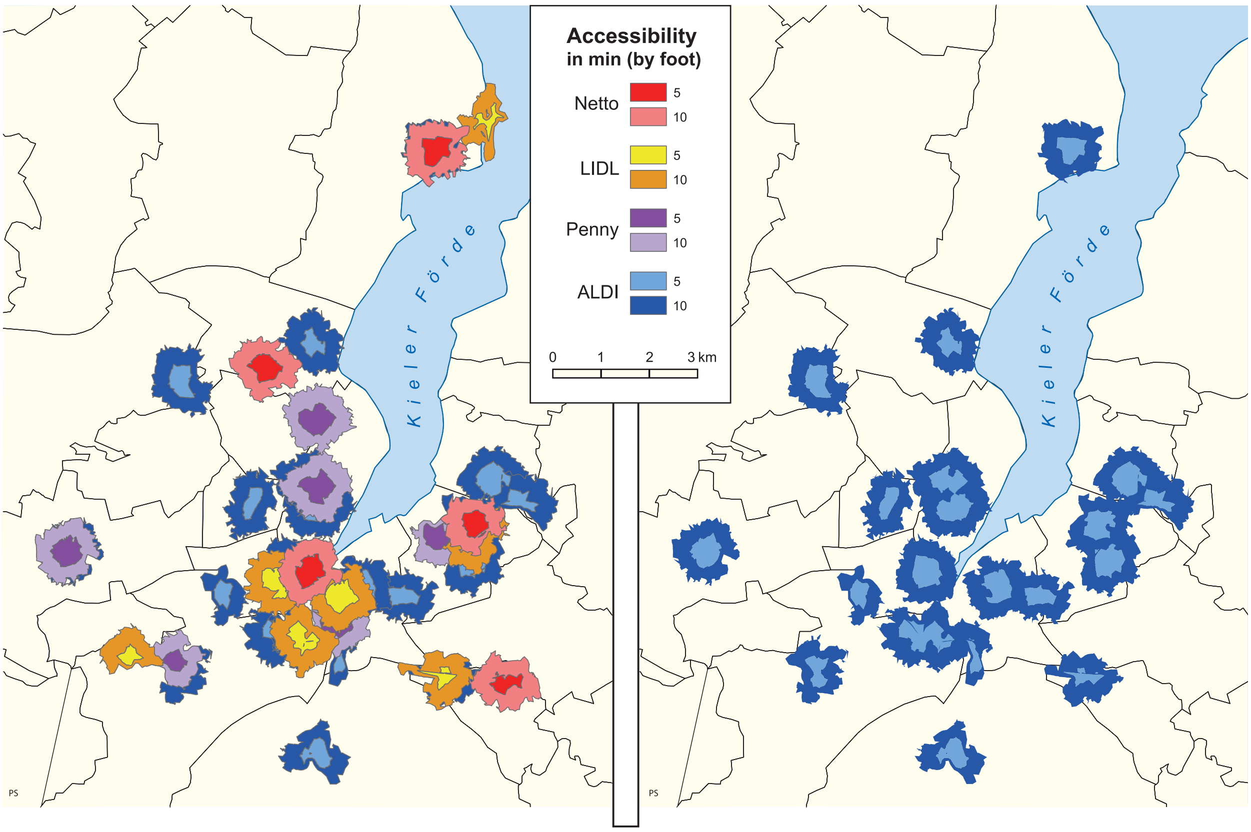

Fig. 3. Accessibility of discounters by foot in the city of Kiel, Germany.
Source: Nielsen Company 2011, content prepared by S. Schnitker (GIS), cartographic elaboration by P. Sinuraya.

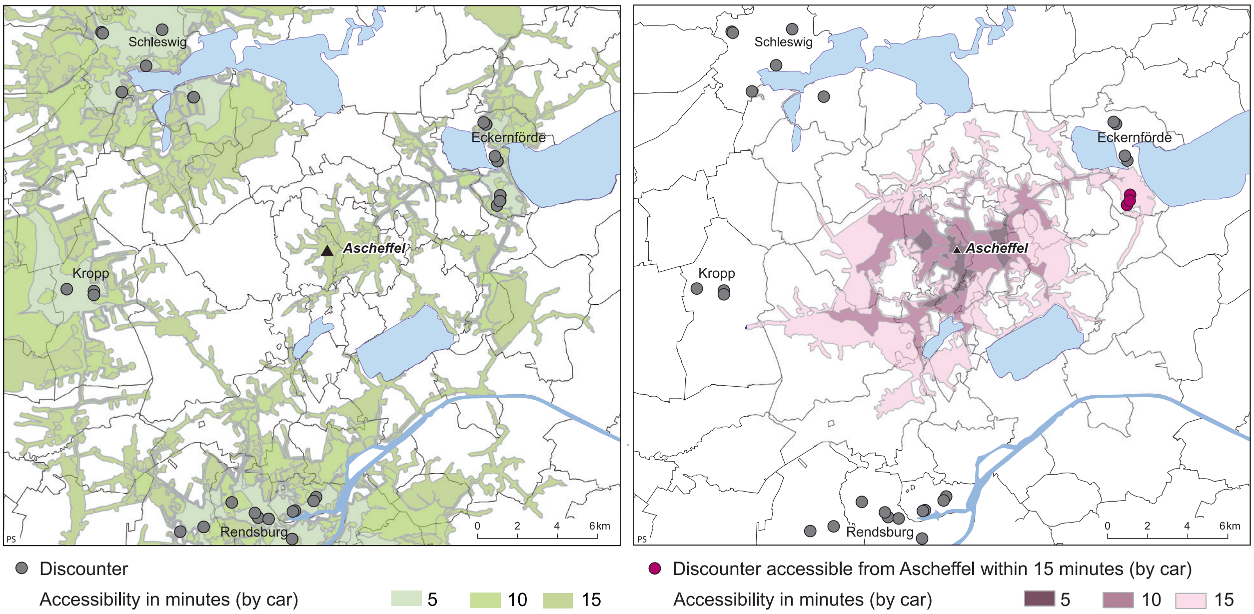

Fig. 4. Accessibility of discounters by car in the rural area of Ascheffel, the province of Schleswig-Holstein, Germany.
Source: Nielsen Company 2011, content prepared by S. Schnitker (GIS), cartographic elaboration by P. Sinuraya.

Table 2. Comments on discount stores in online newspapers.

Statement	Name of blogger and source
"Germans prefer to eat cheap" – Shouldn't it read "Germans can only afford cheap food"? No normal person voluntarily renounces quality food. With the present tax burden, low incomes, etc., many people have no other choice than to buy cheap food.	"Mündiger Staatsbürger", 3 June 2009, 2:22 p.m. in Welt Online
Not cheap, but economical in the sense that it is "worth the price". There is a difference between buying groceries pragmatically or going shopping for clothing; neither one nor the other has to be unenjoyable.	"Bildergalerien", 3 June 2009, 2:40 p.m. in Welt Online
I have never considered shopping to be fun. That it has to be fun is just a marketing scheme on the part of a retail industry that hopes to sell unneeded products by focusing on the act of buying.	"Slatibartfass", 3 June 2009, 3:08 p.m. in Welt Online
The most annoying thing about Aldi is that you have to spend just as much time in other stores buying the things that you cannot buy there.	"a.m.e.", 27 July 2010, 1:23 p.m. in Spiegel Online
Aldi is just another indicator of the downward cultural spiral – products are sold out of cardboard boxes in barren, standardised warehouses with a parking lot in front. Aldi fits perfectly in a rationalised, ghastly world in which everything is reduced to a minimum and to its simple effectiveness. No design, no beauty, no inspiration. Only cheap, cheap, cheap.	"dev0", 28 July 2010, 12:35 p.m. in Spiegel Online

Source: Welt Online and Spiegel Online.

Governance: the competition for discounters

The expansion of the discounter chains continues unabated. They open more stores, relocate from older to newer buildings, or expand existing buildings to accommodate new tenants and thus increase the drawing power of their own store. The implementation of these projects requires the consideration of complex legal planning and construction norms, the interpretation of which lies with local elected officials. They are increasingly challenged by civil society organisations, such as citizen associations, local resident or nature conservation groups. Informal governance structures emerge, often out of *ad hoc* groups that argue on the 'nimby' (not in my backyard) principle. These usually very small but necessarily media-savvy groups and the concentration of inherent technocratic 'expertise' that sometimes exceeds that of elected officials make the interpretation of planning and construction norms all the more complicated and time consuming (compare the expert interviews in Jürgens 2012a). Reasons and/or perceptions raised against allowing a grocery discounter to open a store include, for example: (a) the unaesthetic design of the very functional buildings, (b) noise and light pollution and increased traffic load, (c) adverse changes to the community and landscape, (d) adverse effects to established small retailers and the risk of the discounter acquiring a monopolistic position in the foreseeable future, (e) ideological reasons that reject a sales strategy on the basis of low prices as unethical, and (f) the threat of growing anonymity (at least in rural areas) and loss of a retail culture. A concomitant pressure on local politics and politicians is inevitable, the latter – unlike civil society initiatives – being subject to recurring legitimation through election.

Table 3 shows by means of selected headlines in local newspapers how diverse the challenges and responses towards discounters are on the part of local administrators and politicians. The 'competition' between supermarkets (compare first headline in Table 3) is a reference to an inevitable problem that if one competitor expands or moves to an improved location, it triggers a reflex to do the same among others. Unlike the 'quick' decision-making common in the private sector, policy, planning and administration are oftentimes subject to a different chronological logic of negotiations, legal security and majority formation. "A protracted planning process in turn runs the risk that the interested retailer abandons the project" (line 3 in Table 3). In some cases, a decision whether a construction project may move forward or not is forced on the parties by courts – if it is not achieved first by means of sufficient lobbying on the part of the grocery discounter chain. The arguments they put forward include (compare interviews with mayors and citizen groups in Jürgens 2012a): (a) the number of potential new jobs; (b) the demands of residents for better retail infrastructure; and (c) infrastructural 'gifts' such as the co-financing of access roads, traffic lights, etc. This pressure declines the better a community is provided with discount retailers. Since all discounter chains tend to want to be

Table 3. Grocery discounters in local news.

Competition between supermarkets	"Kieler Nachrichten", 12 April 2013 (1)
Discounter pushing for a decision	"Kieler Nachrichten", 22 Nov. 2012 (2)
New plans with light and dark sides	"Kieler Nachrichten", 09 April 2013 (3)
Lidl wants to enforce construction rights in court	"Kieler Nachrichten", 05 March 2013 (4)
Next step for new Norma market	"Kieler Nachrichten", 16 Jan. 2013 (5)
Discounter expansion, yes, but in moderation	"Schleswig-Holstein-Zeitung", 10 April 2013 (6)
Resistance to new supermarket	"Schleswig-Holstein-Zeitung", 25 March 2013 (7)
Discounter comes, park remains	"Schleswig-Holstein-Zeitung", 21 Sept. 2012 (8)

Source: "Kieler Nachrichten" and "Schleswig-Holstein-Zeitung".

Table 4. Lidl openings based on community size.

Openings	≤2,500 inhabitants	>2,500 to 5,000 inhabitants	>5,000 to ≤10,000 inhabitants	>10,000 to ≤20,000 inhabitants	Bigger communities	Total
Up to 1995	100	0	0	0	0	1
1996–2000	21	4	17	8	50	24
2001–2005	16	14	32	14	24	37
2006–2011	32	15	11	16	26	19
Total	22	11	22	12	32	81

Source: Lidl-Wasbek (2011); including northern and north-western part of Schleswig-Holstein.

present in the same (central) communities, negotiation processes may extend over several years. In the recent years they have shown increased interest in rural niches (Table 4) where gaining administrative approval for construction projects lasts only a few months, the community itself is interested in finding a grocery discounter, and resistance can be expected to be minimal.

Conclusions

The gradual changes in the discount grocery sector lead to other operation forms continuing to lose in importance. Discounters understand how to find and occupy new niches again and again, thus contributing to a reduction in the diversity of retail infrastructure. Because discounters focus in their choice of location on only a few communities and increase their attractiveness by means of strategic clustering with complementary retailers, they tend to reduce retail infrastructure in peripheral regions. GIS-based data verify this thinning trend. It is thus all the more understandable that even these peripheral communities are greatly interested in attracting grocery discounters (although sometimes in fierce discursive battles with minority citizen groups), which are perceived in these 'loser' regions as a measure of the quality of life, units securing the provision of basic needs, and as a marker of a 'modern', up-and-coming municipality. Since the authority for infrastructure planning lies in the hands of these municipalities, it is clear that the long-term societal impact of an ongoing monopolisation of the retail industry is not considered at this local political level (driven by political ambitions focused on winning the next election). The goal must be to provide individual municipalities with greater expertise beyond simple, standardised retail industry reports, or to transfer infrastructure planning authority to a higher, inter-municipal level.

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