Retail Report - 2025

OBSERVATOIRE NATIONAL DES PME
LUXEMBOURG

LE GOUVERNEMENT DU GRAND-DUCHÉ DE LUXEMBOURG
Ministère de l'Économie

CHAMBRE DES MÉTIERS LUXEMBOURG

CHAMBER OF COMMERCE LUXEMBOURG
POWERING BUSINESS

LUXEMBOURG CONFEDERATION

Legal Notices

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Key Figures

672,100
Population (2024)

+64.5 %
Population growth since 2000

522,650
Employees (2024)

231,290
Cross-border workers (2024)
→ **44.3 %** **of total employees**

55,800
Employees in retail (2023)
→ **11.6 %** **of total employees**

€6,073
Total revenue per capita
→ **+24.0 %** **compared to 2020**

€40,931
Purchasing power per capita (2023)
→ **€19,786** **UE-27 average**

8.6 %
Share of retail in total gross value added (2023)
→ **9.7 %** **in 2015**

Key Figures

23,800
Employees in the Horeca sector (2023)

→

+3.9%
compared **to the previous year**

3,486 million
Overnight stays (2023)

→

+24.5%
compared **to the previous year**

Figures from STATEC

Positioning in 2023 (2022)	Country	Population	Purchasing power per capita (€)	Purchasing power index EU-27
1 (1)	**Luxembourg**	**660,809**	**40,931**	**206.9**
2 (2)	Danemark	5,932,654	32,490	164.2
3 (4)	Irlande	5,149,139	26,882	135.9
4 (3)	Austriche	9,104,772	26,302	132.9
5 (7)	Allemagne	84,358,845	25,921	131.0
6 (5)	Belgique	11,697,557	25,783	130.3
7 (9)	Pays-Bas	17,811,291	25,098	126.8
8 (6)	Finlande	5,563,970	24,056	121.6
9 (8)	Suède	10,521,556	23,522	118.9
10 (10)	France	68,087,853	23,355	118.0
	EU-27 (TOTAL)	**448,964,977**	**19,786**	**100.0**

Source: © GFK und NielsenIQ: Einzelhandel Europa 2023 and 2024

01 | Foreword

Retail is both a sector rooted in long-standing tradition and an industry undergoing constant transformation. In a rapidly evolving world, it is essential to understand the trends that are redefining this sector, such as digitalization, the emergence of new business models, and increasing expectations in terms of sustainability. In this context, the growth of online commerce remains one of the greatest challenges, but also a major opportunity. It influences not only consumer behavior but also the role of retailers in our towns and cities.

The Retail Report 2025, based on an in-depth analysis and updated data, highlights key developments: a 5.3% increase in sales areas since 2019, a 13.3% growth in the food retail sector, and a contribution of 8.6% to the total gross value added. These figures illustrate the vitality and dynamism of our local commerce. More than just an analytical tool, this report serves as a strategic guide, helping businesses identify opportunities and assisting public decision-makers in planning concrete actions.

I remain committed to supporting the retail sector through this transformation by providing industry stakeholders with key resources to help them adapt and thrive in this new environment.

I commend the work carried out by the project partners, who, through reliable data and strategic vision, enable both public and private actors to make informed decisions. Together, we must continue to promote an innovative, sustainable, and forward-looking retail sector while preserving its essential role in our economy and society

Lex Delles
Minister for the Economy, SMEs, Energy, and Tourism

02 | Members of the GIE and Project Partners

GIE Observatoire national des PME

This Economic Interest Group (GIE) was established by the State, the Chamber of Commerce, and the Chamber of Skilled Trades and Crafts to support and promote small and medium-sized enterprises (SMEs) in the commerce and crafts sectors. The Observatoire national des PME (hereafter referred to as Observatoire PME) contributes to the implementation of three major projects: the management of the Trade Register ("Cadastre de Commerce"), the establishment of regional offices for the House of Entrepreneurship, and the promotion of a national business succession platform.

The Trade Register ("Cadastre de Commerce")

The national-level Trade Register provides a comprehensive overview of the structural development of various economic sectors, including retail, the food crafts sector, and the Horeca sector. Thanks to Geographic Information System (GIS) technology, the data collected in the Trade Register can be spatially mapped and analyzed, allowing it to be cross-referenced with additional market data. This tool is particularly valuable for municipalities, enabling them to better understand their economic landscape and make informed decisions in urban planning, spatial organization, city marketing, and economic development.

Members of the GIE Observatoire national des PME

LE GOUVERNEMENT
DU GRAND-DUCHÉ DE LUXEMBOURG
Ministère de l'Économie

Ministry of the Economy

The Ministry of the Economy is the main public institution responsible for SMEs, overseeing various business-related policies, including business permits and financial support programs. The Ministry plays a key role in shaping the SME Action Plan, ensuring that Luxembourg's small and medium-sized enterprises benefit from streamlined administrative processes and high-quality public services.

More information: **www.meco.gouvernement.lu**

CHAMBER OF COMMERCE LUXEMBOURG
POWERING BUSINESS

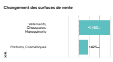
Chamber of Commerce

The Chamber of Commerce assists businesses in creation, development, and international expansion, while also acting as an independent representative of their interests.

Currently, the Chamber of Commerce has 90,000 affiliated companies, representing 75% of total employment and 80% of Luxembourg's GDP. It serves all businesses in the country, except for those in the craft and agricultural sectors.

Through its activities, initiatives, and policy recommendations, the Chamber of Commerce consistently pursues the common interests of its members, ensuring a business-friendly environment..

More information: **www.cc.lu**



Chamber of Skilled Trades and Crafts

The Chamber of Skilled Trades and Crafts is a professional body that represents and safeguards the interests of Luxembourg's crafts sector.

As a public institution with mandatory membership, it serves as the official voice of 8,500 craft businesses, employing 103,000 people. The chamber represents a diverse range of sectors, including food crafts, fashion, healthcare, mechanics, construction, technical installations, communication, multimedia, and artistic crafts.

More information: **www.cdm.lu**

Luxembourg Confederation

The Luxembourg Confederation is an employer organization that defends the interests of commerce and its affiliated federations at the national and European levels. It is the main representative body for all retail businesses in Luxembourg and plays a leading role in the development and implementation of commercial policies.

As the primary contact point for the retail sector, the Luxembourg Confederation monitors and analyzes market trends and actively participates in the development of strategies to support and revitalize urban commercial spaces. Through its continuous dialogue with public authorities, it contributes to legislative processes that shape the economic environment for retailers. The Luxembourg Confederation also serves as a key partner for cities and municipalities by providing strategic guidance for urban development and commercial site planning. Its expertise in local commerce dynamics helps public and private stakeholders identify the most effective ways to support and strengthen commercial activities in their respective regions.

More information: **www.confederation.lu**

Project Partners

LE GOUVERNEMENT
DU GRAND-DUCHÉ DE LUXEMBOURG
Ministère du Logement et de
l'Aménagement du territoire

Département de l'aménagement
du territoire

Ministry of Housing and Spatial Planning

The Department of Spatial Planning (DATer) within the Ministry of Housing and Spatial Planning is responsible for coordinating the territorial impact of national and municipal sectoral policies. It plays a crucial role in ensuring that the different economic, environmental, and social policies implemented at the national and local levels align with sustainable spatial development objectives. The goal of spatial planning is to promote a balanced and sustainable use of land, ensuring that economic growth is compatible with environmental preservation and resource management. Through strategic planning, DATer seeks to develop urban and rural areas while fostering high-quality living environments for the population. By anticipating future challenges, it aims to create functional and attractive spaces that cater to the needs of businesses, residents, and public services. DATer actively collaborates with the Observatoire national des PME, particularly in the analysis of the retail sector. The data provided by the Observatoire PME is a key element in assessing economic activity and commercial density, which in turn informs spatial development strategies. Conversely, DATer contributes important information on factors such as land use planning, accessibility, and urban centrality, which influence not only commercial activities but also public services, healthcare, education, and leisure infrastructure. Through this collaboration, DATer and the Observatoire PME contribute to a more comprehensive understanding of commercial dynamics, enabling policymakers and businesses to make data-driven decisions that promote sustainable urban and economic developmen

More information: **www.amenagement-territoire.lu**

uni.lu
UNIVERSITY OF LUXEMBOURG
Department of Geography
and Spatial Planning

University of Luxembourg – Department of Geography and Spatial Planning

The Department of Geography and Spatial Planning at the University of Luxembourg consists of an international, interdisciplinary team of over 50 researchers who study spatial development processes on local, regional, and global scales. By combining spatial analysis with applied urban planning, the department provides valuable insights that contribute to scientific research and policy recommendations. The strong synergy between academic research and practical applications enables a comprehensive understanding of economic and social developments in Luxembourg.

More information: **www.uni.lu**

03 | **Why a Trade Register?**

The retail sector is currently undergoing profound structural changes. The rise of e-commerce, multi-channel distribution, and the concept of "retailtainment" are just a few of the factors reshaping the industry. These shifts in consumer behavior present new challenges for both retailers and cities, requiring innovative approaches to ensure the long-term vitality of commercial districts.

First of all, we need to know and understand the existing retail landscape and how it is changing if we are to be able to deter mine the necessary actions.

To implement effective measures, it is essential to first understand the existing commercial landscape and its evolution over time. This requires reliable data that provides an accurate overview of business structures and location dynamics in Luxembourg. In the past, such data was scarce or incomplete, making it difficult to develop targeted commercial strategies, both at the national and local levels.

The launch of the Trade Register project in 2019 helped address this gap. By combining comprehensive field data collection with external market data, the Trade Register provides a detailed and holistic view of the commercial landscape, its structure, and its geographic distribution. Furthermore, it does not focus solely on retail but also includes businesses from other key sectors, such as Horeca, craftsmanship, and various services. This cross-sector approach enables a more accurate analysis of the economic dynamics of different regions and commercial hubs.

For a better understanding of the types of data collected in the Trade Register, please refer to Chapter 5.1 – Methodology and Data.

Moving forward, regular updates and evaluations of this data will allow for the early detection of trends and market shifts. This will help anticipate future challenges and facilitate proactive decision-making for the sustainable development of commercial areas. As a result, the Trade Register serves as a foundational tool for economic policy decisions at the local, regional, and national levels.

More information about the Trade Register service can be found in Chapter 09

04 | Who is the Retail Report for?

The information compiled in the Retail Report, presented in the form of maps and statistics, serves as a foundation for an objective discussion on the future of commercial development. It provides insights into national, urban, and economic trends, the local retail landscape, land use, and strategic site planning. As such, the report is intended for a wide audience of both public and private stakeholders:

Ministries, Chambers, and Professional Organizations

Thanks to the Retail Report, ministries, chambers, and professional organizations now have access to a national reference database on economic developments and retail trends. The various business indicators included in the report provide a solid foundation for informed discussions and policymaking.

Professional organizations can leverage this data to gain insights into trends within their respective sectors. The information can serve as a decision-making tool for developing and refining strategic actions aimed at supporting businesses and ensuring sustainable commercial growth.

Cities, Municipalities, Local Authorities, and Tourism Organizations

Cities and municipalities can use the Retail Report to stay informed about national trends in retail and Horeca. It allows them to assess their own economic situation by comparing it to national benchmarks. The report provides data that can help municipalities identify strengths and weaknesses in their commercial landscape, ultimately guiding their economic and urban planning strategies.

Important Information for Municipalities:

Since 2022, all municipalities in Luxembourg have had the opportunity to actively participate in the Trade Register project by subscribing to the service for a symbolic fee of €1,500 per year (excluding VAT). Through this program, municipalities gain access to their own raw data and various analytical tools that support evidence-based decision-making.

Municipalities interested in participating can also benefit from comprehensive advisory services and the networking opportunities provided by the Luxembourg Confederation

More details on municipal participation can be found in Chapter 09.

Retailers, Horeca Operators, and Businesses

Private economic players—such as retailers, Horeca operators, and hospitality businesses—can use the Retail Report as a tool to evaluate potential new locations for their activities. By analyzing commercial density, market trends, and competitive dynamics, businesses can make informed decisions on expansion, relocation, or investment.

Important Information for Businesses:

Since 2023, all businesses in the retail and Horeca sectors have been able to access certain key insights from the Trade Register project.

Thanks to the Localyze.lu service, interested businesses can request an interactive map that provides valuable insights into the market environment of existing or potential locations. This service offers detailed geographic and economic data, helping entrepreneurs assess opportunities and risks before making investment decisions.

More information can be found in Chapter 10.

Research Institutions

Scientific institutions can use the Retail Report as a data source for their research. The report provides an objective basis for discussion on the future of cities and regions. It also aims to raise awareness of the challenges of digitalization and to promote exchange and collaboration between the research and business sectors.

Private Individuals

The Retail Report is also intended for anyone interested in economic developments and the future of retail.

05 | Explanations and Remarks

When reading the statistics, several questions may arise—such as the exact definition of the food crafts sector, the distinction between a shopping center and a local convenience center, or what is meant by the term sales area.

The definition of retail trade can vary depending on how it is approached. A broad definition would include not only "traditional retail sectors" such as clothing, footwear, and food but also businesses that engage in food craftsmanship, such as bakeries and butcher shops.

Depending on the chosen definition, the number of recorded retail businesses can vary significantly. This example highlights the importance of clear definitions to ensure accurate data interpretation.

This chapter provides clarifications on key terms used in the report, enabling a more precise understanding of the presented data. A glossary with additional definitions is also available in Chapter 05.02.

05.01 | Methodology and Data

The study on retail trade in Luxembourg is based on various data sources. The primary source is the Trade Register, which was first established in 2019 following a comprehensive field survey conducted by a specialized retail research firm. Since then, the register has been updated every six months to ensure that the data remains current and accurate. The most recent update took place between July and September 2024. Therefore, most of the statistics presented in this report refer to this period and provide an overview of the retail landscape at the time of data collection.

05.01.01 Which Businesses Are Recorded in the Trade Register?

The term "Trade Register" can be misleading, as it includes more than just traditional retail businesses. Historically, city centers have attracted visitors primarily due to their commercial activity. However, in the digital age, where products can be easily delivered to consumers' homes, people are increasingly visiting these areas for other reasons beyond shopping.

To remain attractive, city centers must evolve into multifunctional spaces, offering a diverse mix of retail, dining, and services. Many urban development strategies are now prioritizing this multifunctionality as a key component of their revitalization efforts. The Trade Register reflects this evolution by including not only traditional retail stores but also businesses from other economic sectors, such as the Horeca industry, food craftsmanship, and certain service and craft businesses. This cross-sector approach aims to provide a comprehensive overview of economic activity at various locations throughout the country. It also facilitates a more detailed assessment of the attractiveness of different commercial zones by considering their overall economic ecosystem rather than just standalone retail activity.

**1 Traditional retail trade includes all retail businesses whose main added value comes from the sale of goods to consumers (B-to-C). Characteristics: the business must be accessible to customers, and product prices must be clearly displayed.*

**2 Food craftsmanship primarily refers to bakeries, pastry shops, confectioneries, chocolatiers, butcher shops, and caterers. It is a subsector of food retail, which also includes, for example, supermarkets specializing in food products.*

Important note:

While data collection for retail trade (in the broad sense) and the Horeca sector was conducted nationwide across the Grand Duchy, this was not the case for service providers and craft businesses, whose recording was limited to or focused solely on "commercially relevant sites." These include city centers, district and neighborhood centers, shopping centers, and local convenience centers.

When interpreting the statistics presented in the Retail Report (see Chapter 6 and following), it is essential to distinguish between economic sectors that have been fully recorded and those that have been only partially surveyed.

Below is an overview of the data collection methodology:

What information is contained in the national Trade Register? And is it updated periodically?			
Economic sector	**Recorded nationwide**	**Only recorded in commercially significant areas**	**Sales area recorded*3 (yes/no)**
Traditional retail trade	×		Yes
Food craftsmanship	×		Yes
Horeca	×		No
Service businesses with retail sales*4		×	Yes
Other service businesses		×	No
Skilled trades and craftsmanship		×	No

**3 Service businesses with retail sales: These are businesses whose primary activity falls within the service sector, but which also sell retail products. A classic example is a hair salon that also sells hair care products. All other businesses that do not fit this description are classified as "other services" or service establishments without retail sales.*

**4 Sales area: This includes, in simplified terms, "all areas that are accessible to customers and where a sales transaction can take place" (see Chapter 5.2 for further details).*

i

Not included in the Trade Register:

- Mobile vendors (sales carts, food trucks, etc.)
- Wholesale trade ("B2B")
- Car dealerships (mainly in industrial areas, away from city centers or town centers)
- Fuel and construction material trade (without regulated-price products)
- Weekly markets
- Pure online players (businesses operating exclusively online without a physical presence)

05.01.02 The Economic Sectors Covered

Breakdown of establishments by sector:

Retail Trade (Traditional)

All retail outlets (see the list of sectors on the next page), including:

- Gas station shops (generally self-service mini-markets).
- Includes specialized stores selling accessories for cars, motorcycles, and bicycles.

Food Craftsmanship

- Bakeries, pastry shops, chocolatiers
- Butcher shops

Hotels, Restaurants, Cafés, Bars (Horeca *5)

- Hotels
- Restaurants
- Fast-food restaurants, snack bars
- Bistros, cafés, ice cream parlors
- Bars, pubs, music clubs

**5 For practical reasons, no sales area has been recorded so far for the Horeca sector; only the addresses of establishments along with their corresponding sector classification have been documented.*

Mixed-Use Spaces and Sales Area Allocation

In cases of mixed-use spaces (e.g., a retail store with an integrated café), the data collection process identifies both the primary and secondary activity of the business. The classification is determined based on: Visual assessment of the dominant activity (store layout, signage, and branding). Estimated space allocation between activities (e.g., sales floor vs. dining area).The secondary activity is recorded in a comment field in the database.

Services

- Service Businesses with Retail Sales

- Pharmacies (this is the only category in this group that was fully recorded).
- Post offices
- Hair salons
- Photo studios
- Key cutting and locksmith services
- Beauty salons, massage centers, nail and foot care studios
- Gyms and fitness centers
- Etc.

- Other Service Businesses

- Real estate agencies
- Training centers
- Travel agencies
- Advertising agencies
- Dry cleaners and laundries
- Yoga studios
- Pet grooming salons
- Funeral services
- Etc.

Note: Businesses in this category may also be classified as "Service Businesses with Retail Sales" if they sell products with clearly marked prices as a secondary activity.

- Financial Services

- Bank branches
- Insurance agencies
- Investment and financial advisory firms
- Loan and credit brokers
- Accounting and tax advisory firms
- Etc.

- Medical and Social Facilities

- Medical laboratories
- Medical centers
- Dental clinics
- Physical therapy and rehabilitation centers
- Social services
- Podiatry clinics
- Home care providers
- Trade unions
- Health insurance providers
- Non-profit organizations
- Etc.

Skilled Trades and Craft Businesses

- Architecture firms
- Painting companies
- Chimney construction businesses
- Stone masonry businesses
- Tiling contractors
- Roofing companies
- Construction firms
- Bicycle repair shops
- Carpentry workshops
- Upholstery businesses
- Electrical services
- Etc.

05.01.03 Overview of Retail Sectors

Below is an overview of the classification of retail sectors and their corresponding economic activities recorded in the Trade Registe

Food Craftsmanship

- Bakeries, pastry shops, confectioneries
- Butcher shops.

Retail Trade (Traditional):

- Food Retail
- Beverages
- Pharmaceutical products
- Clothing, footwear, leather goods
- Tobacco products
- Perfumes, cosmetics
- Watches, jewelry
- Electronics, home appliances, computers, photography
- Garden supplies, pet supplies

- Cut flowers
- Toys, hobby supplies
- Furniture, home accessories
- Home textiles
- DIY, glassware, porcelain, ceramics, household goods
- Antiques, art objects
- Books, stationery, newspapers, office supplies
- Sports goods, bicycles, leisure equipment
- Optics, hearing aids, health products
- Automobile and motorcycle accessories
- Telecommunications

Service Businesses with Retail Sales

- Service (with attached retail sales)
- Other services
- Service (without attached retail sales)
- Financial services
- Medical and social institutions

Skilled Trades and Craft Businesses

- Skilled Trades and Craft Businesses

Hotels, Restaurants, Cafés, Bars

- Hotels
- Restaurants
- Fast-food restaurants, snack bars
- Bistros, cafés, ice cream parlors
- Bars, pubs, music clubs

05.02 | **Definitions**

To avoid misunderstandings in the interpretation of the figures presented in the Retail Report, and to prevent incorrect conclusions, below are explanations of the key terms used throughout the report:

- **Food Craftsmanship:** Refers primarily to bakeries, pastry shops, confectioneries, chocolatiers, butcher shops, and caterers. This sector is part of food retail, which also includes supermarkets and specialty grocery stores.
- **Local Convenience Center:** A location that includes at least one large food retailer (>400 m²), complemented by other service providers, retail stores, or dining establishments in the immediate vicinity. The majority of the sales area (more than 50%) is dedicated to food and delicatessen products.
- **Shopping Center:** A purpose-built commercial complex housing multiple retail and service businesses, including at least two major anchor stores from different sectors. The total sales area must be at least 5,000 m². While local convenience centers focus primarily on daily necessities, shopping centers offer a wider range of products and services.
- **Retail Park:** A particular type of shopping center where several large stores are located around a shared parking area, but without centralized management.
- **Village Centers:** Typically small communities with a limited central area, often with low commercial diversity and primarily serving local needs. A location is classified as a village center if it meets at least one of the following criteria:
  - At least 20 Points of Interest (POI), including at least 5 retail stores
  - A total sales area of at least 500 m²
- **City and District Centers:** Refers to all urban commercial hubs with a significant and diverse range of businesses. These areas contain at least 50 POI, including at least 10 retail stores or a total sales area exceeding 2,000 m².
- **Retail Trade (Broad Definition):** Includes both traditional retail stores and food craftsmanship businesses such as bakeries and butcher shops.
- **Traditional Retail Trade:** Covers all businesses where the primary activity is the sale of goods to consumers (B2C). The main characteristics are that the business must be accessible to customers, and product prices must be clearly displayed.
- **Multichannel Retailing:** Businesses that sell their products through multiple channels, including both physical stores and online shops.
- **Convenience Store / Self-Service Supermarket:** A small food store with a sales area of less than 400 m², offering a limited selection of everyday products. This category also includes businesses primarily selling beverages, tobacco, newspapers, and confectionery, such as gas station shops.
- **Brick-and-Mortar Retail:** Retail businesses that sell products exclusively through physical stores, without an online presence.
- **Service Businesses with Retail Sales:** Service providers whose main activity is providing services, but who also sell products as a secondary business. A classic example is a hair salon that also sells hair care products. Businesses that do not fall into this category are classified as "other service businesses" or "service providers without retail sales."

- **Chain Stores:** Businesses with multiple locations, managed under a centralized business strategy (unified pricing, branding, and marketing). These businesses typically operate from a central warehouse and share administrative functions such as accounting and business management.
- **Business Format:** The classification of retail businesses based on shared characteristics that distinguish them from other types of retailers.
- **Franchise:** A business model in which an entrepreneur purchases the rights to use an existing brand and business concept. In exchange for a fee, the franchisee is granted access to the brand, store design, and operational guidelines to sell products or services.
- **Large-Format Retailer:** Any retail store with a sales area exceeding 10,000 m^2.
- **Hypermarkets:** Large retail stores with a sales area of at least 5,000 m^2, offering a wide selection of food and non-food products (e.g., Auchan, Cactus, Leclerc).
- **Independent Retailers:** All retail businesses that are privately owned and operated by an individual, with only one store location and no branch network.
- **Vacant Commercial Spaces ("Potential Areas"):** Commercial properties that are currently unoccupied and not leased, whether owned by private entities or public institutions. The Trade Register only records vacant commercial spaces—vacant residential properties are not included.
- **Specialty Store:** A retail business focused on a specific product category, offering a wide selection, expertise, and customer service.
- **Big-Box Retailer:** A large-scale specialty store (at least 400 m^2 of sales area) that focuses on a specific product category, mainly operating under self-service, but with some customer service options. Examples include home improvement stores, pet supply stores, and electronics retailers.
- **Furniture Retail:** Includes all furniture retailers, such as home furnishing stores, interior design shops, and mattress outlets.
- **Points of Interest (POI):** All business locations recorded in the Trade Register, including retail stores, Horeca businesses, service providers, craft businesses, and vacant commercial spaces.
- **Pop-Up Store:** A temporary retail store that occupies a vacant commercial space for a limited time.
- **Showroom:** A display space primarily used for presenting products, where direct sales play a secondary role or do not take place at all.
- **Economic Sector:** A category of businesses that produce similar goods or provide similar services.
- **Commercially Relevant Locations:** Areas where retail businesses are concentrated, including city centers, shopping centers, local convenience centers, and retail parks. Additionally, this category includes potential commercial locations identified by market experts as having strong economic potential.
- **Supermarkets:** Retail stores with a sales area between 400 m^2 and 5,000 m^2, selling a full range of groceries and everyday essentials.

- **Discount Stores ("Hard Discount"):** A low-cost supermarket with an average sales area below 1,000 m² (although some newly built locations may be larger). These stores offer a limited selection of products at reduced prices. Examples include Aldi and Lidl.
- **Statuts:** a feature of the land register that provides information on what has changed in an object between two data collections.
- **Geographic Information System (GIS):** A geographical information system (GIS) is a system for capturing, storing, processing, evaluating, visualising and presenting information with a geographical or spatial reference. Using the applications and tools provided by GIS, geoinformation can be structurised and linked together to present complex issues clearly.

Sales Area

The definition of the sales area used in the Retail Report is based on the 2012 **GIF*** directive, which ensures international comparability between rental space and sales area. This definition follows the minimum consensus standard and does not diverge from established norms. According to the GIF directive, the sales area is, in simplified terms, "all areas accessible to customers where a sales transaction can take place."

By definition, this includes:

- Sales halls
- Showrooms and display areas
- Fitting rooms for customers
- Promotional zones and customer service areas
- Checkout and packaging zones
- Shopfront openings and sales areas

Only within designated sales areas:

- Dining, play, and rest areas (e.g., in bookstores)
- Supermarket trolley stations
- Escalators

Outdoor areas used for sales or sales-related activities on a more than temporary basis, such as:

- Sales stands
- Open-air sales areas

For practical reasons, no sales area data has been recorded so far for the Horeca sector; only the addresses of establishments and their respective categorization have been documented.

**GIF: This refers to a network of professionals in the real estate sector. The goal is to establish standards that enhance market transparency and drive ongoing professionalization within the industry.*

06 | Establishments and Sales Areas

This chapter provides an overview of Luxembourg's retail landscape, including the retail sector and the Horeca industry, as well as their structural evolution since the first nationwide data collection in 2019.

The report focuses in particular on the development of the number of establishments and total retail sales areas, broken down by sector, subsector, and additional categories, which allow for a detailed analysis of the structure of the commercial landscape.

	2024	2019	Change
Population of Luxembourg	672,100	626,110	+7.4 %
Number of retail businesses	3,262	3,228	+1.1 %
Retail businesses per 1,000 inhabitants	4.85	5.16	-6.0 %
Total retail sales area* *By category*	**1,112,569m²**	**1,051,460 m²**	**+5.3%**
Food Retail	348,750m²	307,954m²	+13.3%
Fashion & Beauty	230,960m²	229,980m²	+0.4%
Home Equipment	353,664m²	348,770m²	+1.4%
Leisure and Culture	107,760m²	103,580m²	+4.0%
Other Retail	55,905m²	57,710m²	-3.1%
Sales area per capita (I) *By category*	**1.66 m²**	**1.68 m²**	**-1.2%**
Food Retail *(m² per capita)*	0.52m²	0.49m²	+6.1%
Fashion & Beauty *(m² per capita)*	0.34m²	0.37m²	-8.1%
Home Equipment *(m² per capita)*	0.53m²	0.56m²	-5.4%
Leisure and Culture	0.16m²	0.17m²	-5.9%
Other Retail	0.08m²	0.09m²	-11.1%
Number of shopping centers	19	18	5.6%
Number of hypermarkets (I)	6	6	-
Number of large-format stores (II)	13	10	30.0%

i

All reported sales areas have been adjusted for vacancy rates, meaning only active retail spaces and service businesses with attached retail sales are included in the figures.

(I) Hypermarkets are retail stores with a sales area between 5,000 m² and 10,000 m², primarily focused on food retail.

(II) Large-format stores are retail businesses with a sales area exceeding 10,000 m².

Sales Area per Capita

The sales area per capita is a key indicator of market saturation. If this figure remains stable over time, it suggests that the market has reached equilibrium. A continuous increase in sales area per capita indicates that market capacity is expanding, while a decline may suggest overcapacity, requiring adjustments through market consolidation or repurposing of retail spaces.

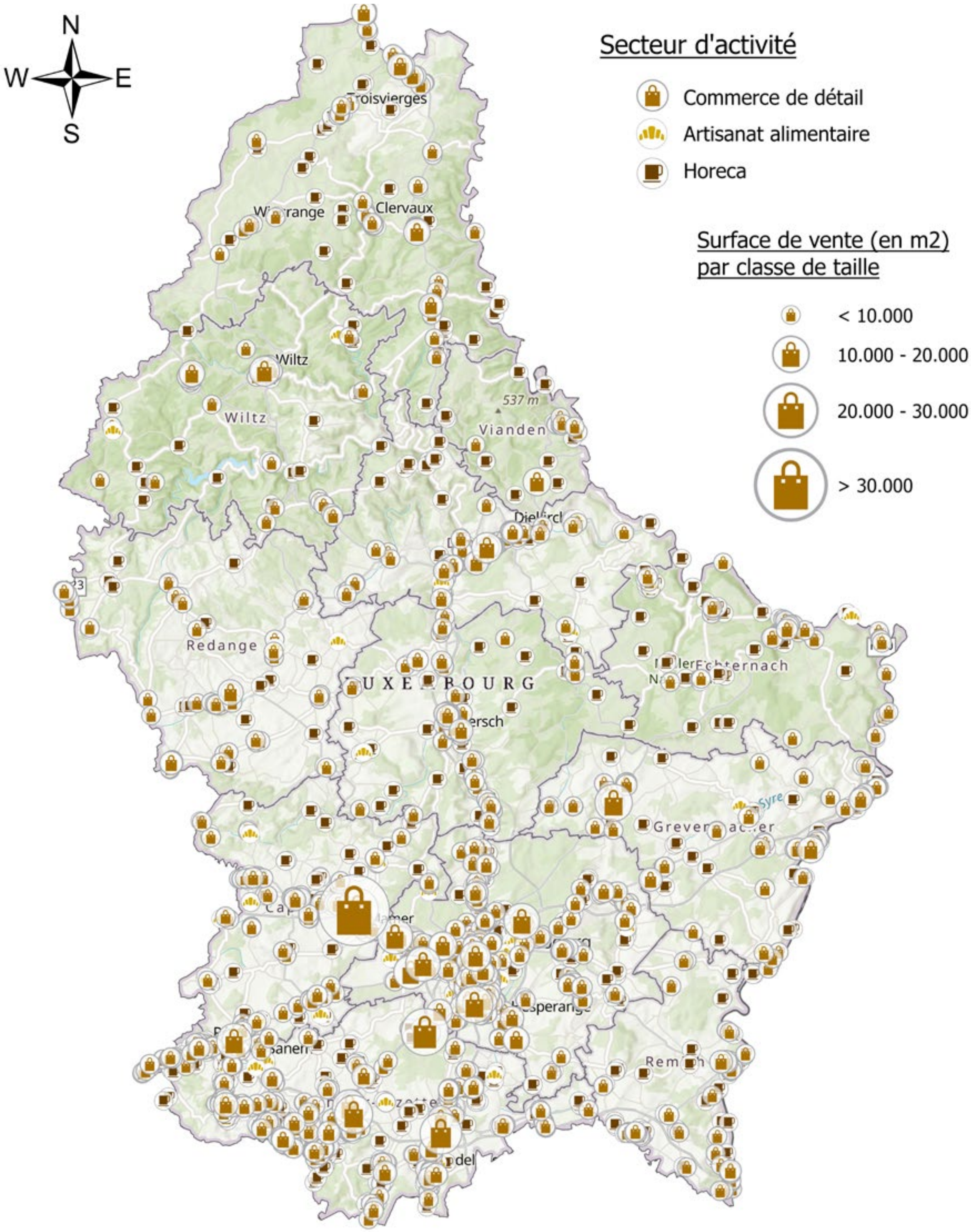
However, sales area per capita is not the only determinant of retail viability. A more critical measure is sales productivity (revenue per square meter of retail space), which provides a more accurate assessment of economic performance. Given that over 231,000 workers in Luxembourg are cross-border commuters, the sales area per capita metric must be viewed in context, as actual consumer demand extends beyond the country's resident population. .

Sales Area Size (m^2)	Total Area (m^2)	Share of Total Sales Area (%)	Number of Locations	Share of Total Retail Units (%)
< $100m^2$	$79,354m^2$	7.2%	1,741	53.4%
>= $100m^2$ et < $400m^2$	$184,210m^2$	16.8%	997	30.6%
>= $400m^2$ et < $5,000m^2$	$568,945m^2$	51.8%	501	15.4%
>= $5,000m^2$	$265,080m^2$	24.2%	23	0.7%
Total	**$1,097,589m^2$**	**100%**	**3,262 locations**	**100%**

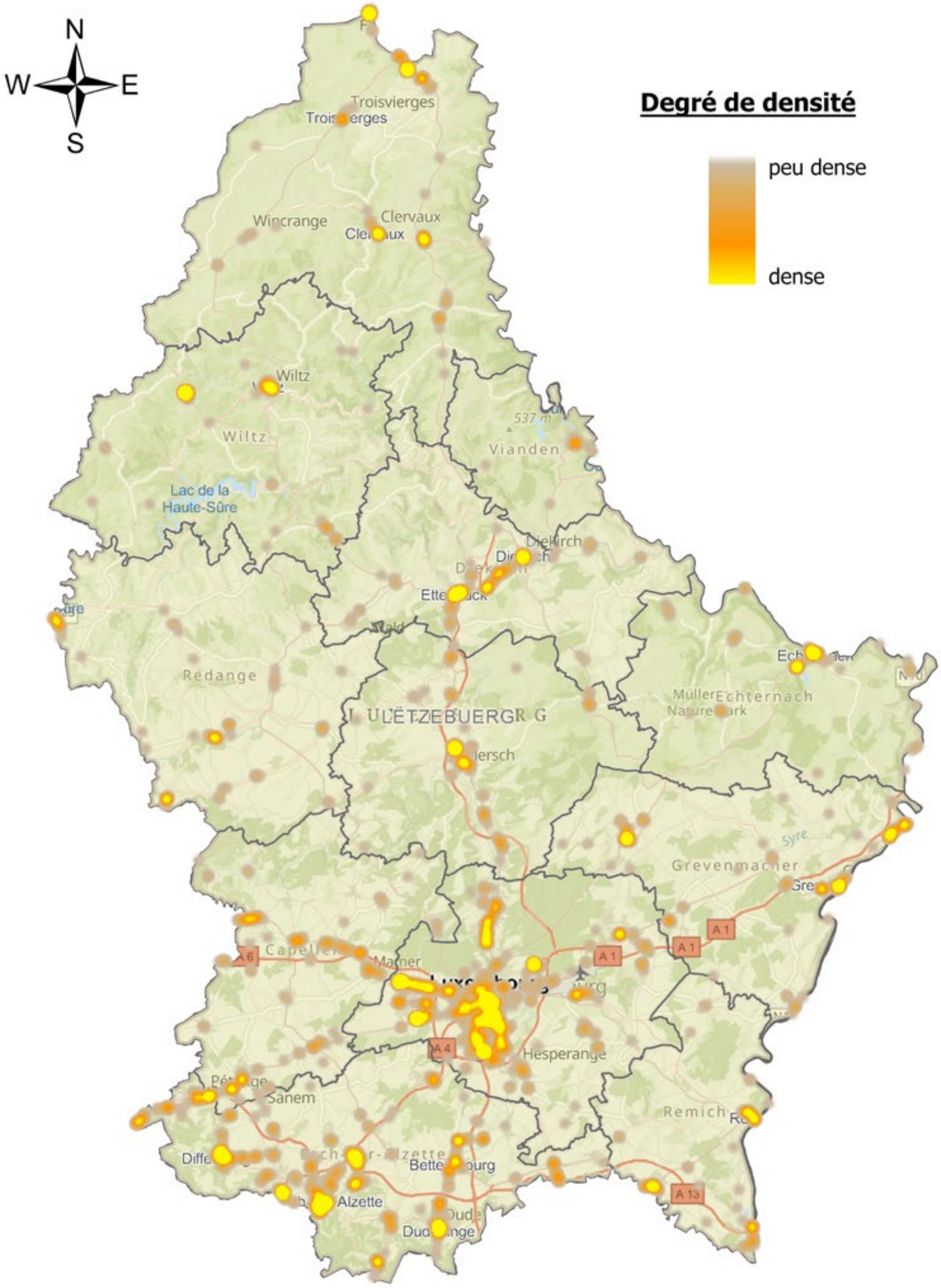
Discover the Geographic Distribution of Retail Establishments by Sector

Geographic Distribution of Establishments

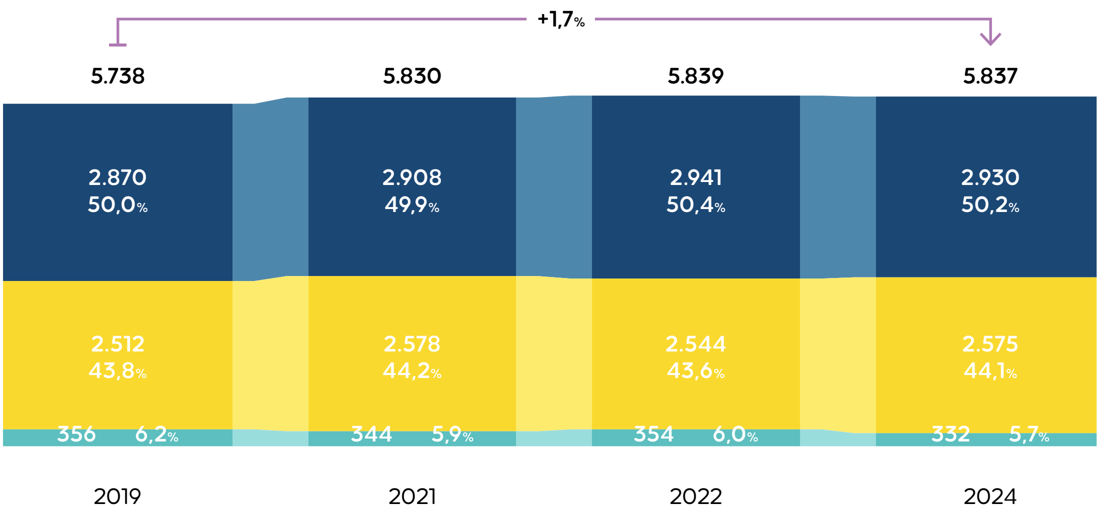
by Economic Sector



Sales Area Density Distribution



Evolution Between Q3 2019 and Q3 2024



06.01 | **Retail Trade**

The results presented in this chapter are based on data from the Trade Register, which includes all traditional retail businesses and food craftsmanship establishments. A total of 3,262 retail businesses were recorded, representing a total sales area of 1,097,039 m^2. The following statistical and cartographic analyses are based on this dataset.

To enhance clarity, retail businesses have been classified into five main categories:

- **Food Retail**
- **Fashion & Beauty**
- **Home Equipment**
- **Leisure & Culture**
- **Other Retail**

These categories cover different primary and sub-sectors recorded in the Trade Register. At the beginning of each subsection, there is an overview of the respective sectors and their breakdown.

Did You Know...?

- There are nearly 100 food stores in Luxembourg specializing in international products.
- The "Home Equipment" category has a larger total sales area than the entire food retail sector.
- Over 40% of all retailers in Luxembourg operate their own online shop.
- More than 50% of supermarkets are located within gas stations.
- The Canton of Esch-sur-Alzette has nearly twice as many bars (116) as the Canton of Luxembourg (64).

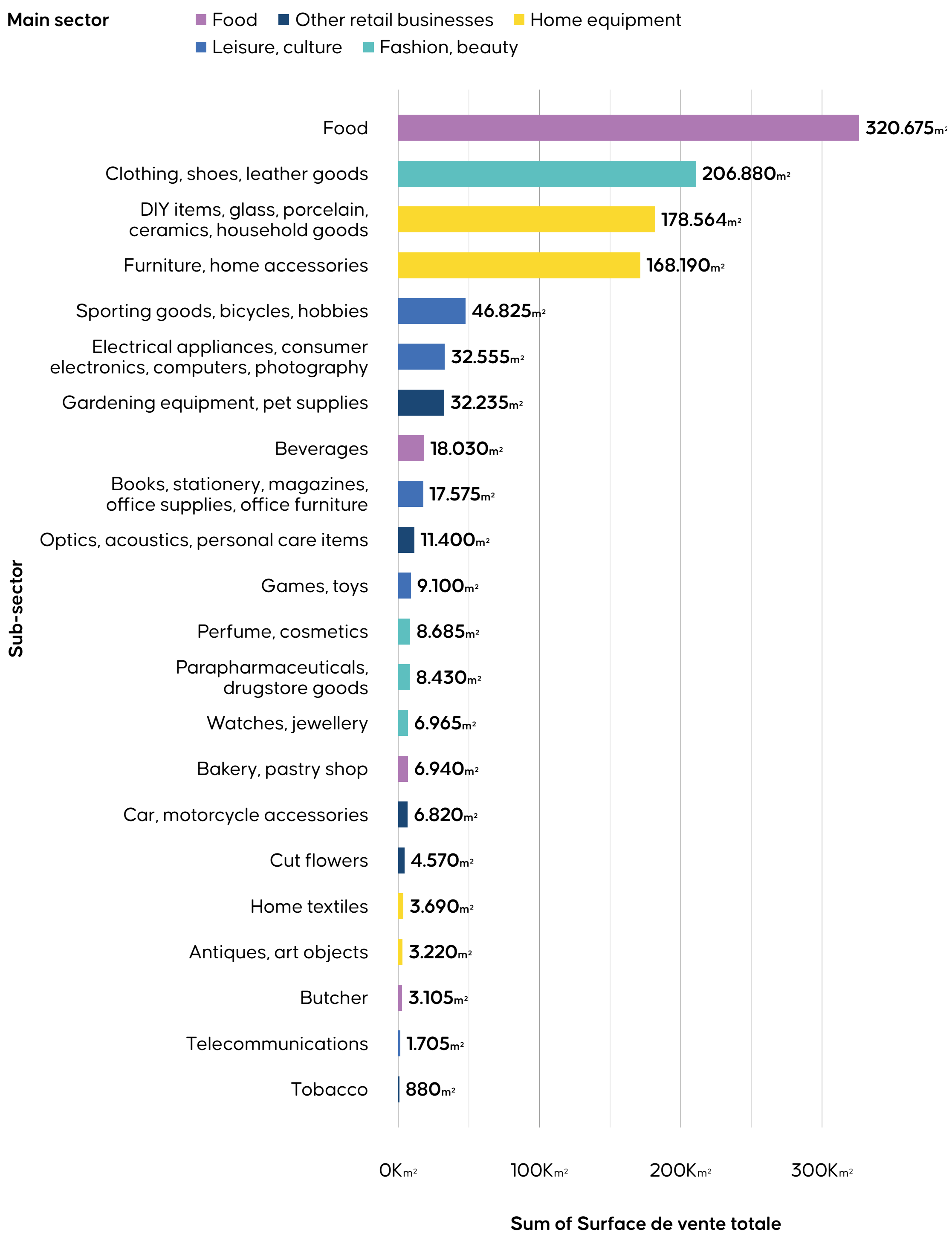
Below is an overview of the distribution of retail establishments by category:

Overview of retail categories

Category	Food Retail	Fashion & Beauty	Home Equipment	Leisure & Culture	Other Retail	Total
Number of retail establishments	1,127	924	454	439	318	**3,262**
Share of total retail establishments (%)	34.6%	28.3%	13.9%	13.5%	9.8%	**100%**
Total sales area (m^2)	348,750	230,960	353,664	107,760	55,905	**1,097,039**
Share of total sales area (%)	31.8%	21.1%	32.2%	9.8%	5.1%	**100%**
Change in sales area 2019-2024 (%)	40,796	980	4,894	4,180	-1,805	**49,045**
Average store size	309	250	779	246	176	**336**

Distribution of Retail Establishments and Sales Areas

by Sector and Category



06.01.01 | **Food Retail**

	Main Sector	Sub-Sector
691 POI 320,675 m²	Food	• General food retail, • international food stores, • specialty food stores, • organic stores, farm shops
104 POI 18,030 m²	Beverages	• Beverage retailers, • wine, spirits stores
88 POI 3,105 m²	Butcher Shops	-
244 POI 6,940 m²	Bakeries, Pastry Shops	-

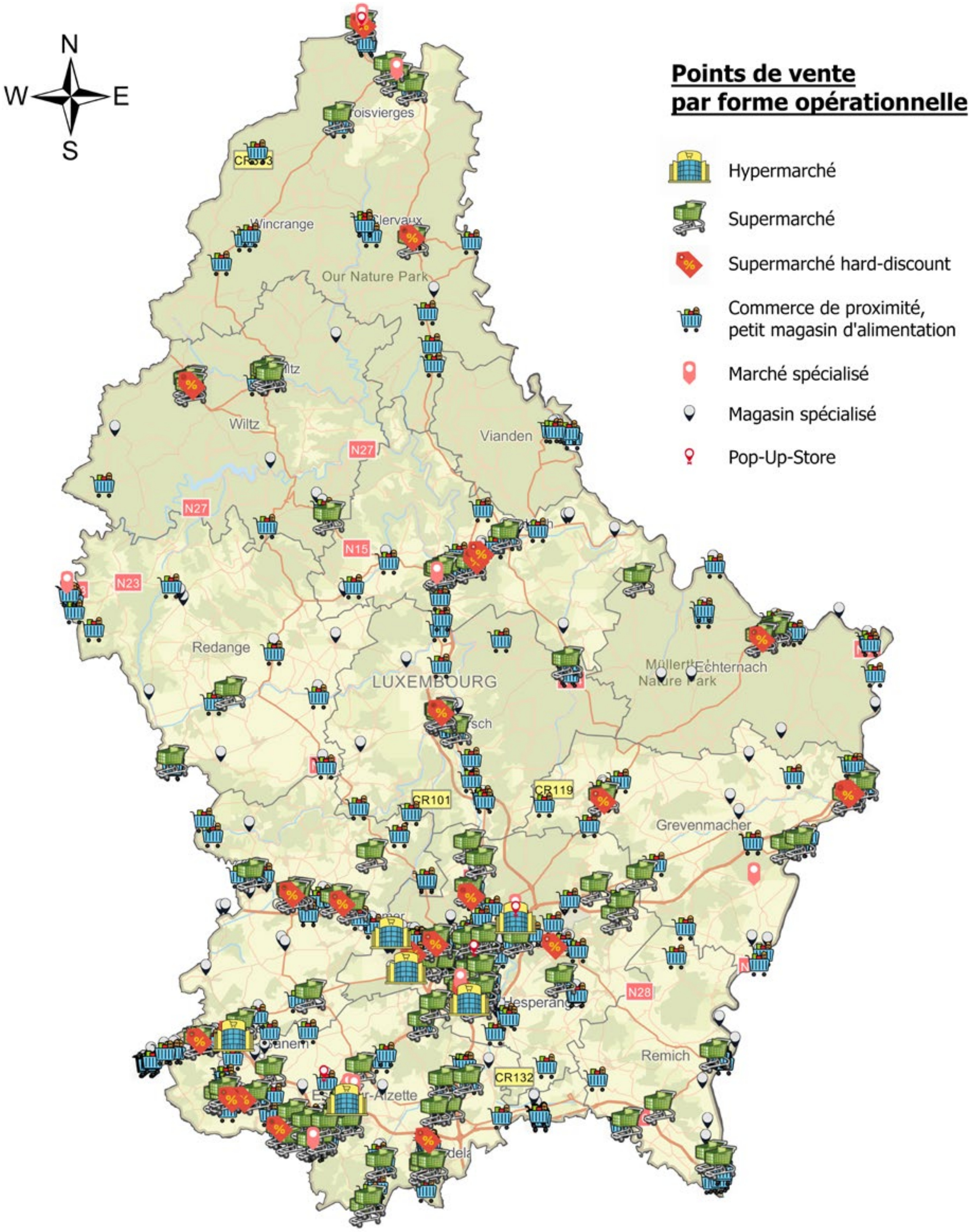
Quick Overview of the Food Retail Sector

- Net sales revenue (2024): **approx. €4,624 billion** (own calculations; source: STATEC)
- Number of retail establishments: **1,127 (+9.5% since 2019)**
- Share of total retail businesses: **34.6%**
- Total sales area: **348,750 m² (+13.2% since 2019)**
- Share of total retail sales area: **31.4%**
- Sales area per capita: **0.52 m²**
- Number of hypermarkets: **6**
- Number of supermarkets: **155**
- Number of discount stores ("Hard Discount"): **30**
- Number of organic stores: **23**
- Chain store penetration: **59% (based on 1,127 stores)**
- Share of businesses with their own online store: **16%**

Explore the Food Retail Sector by Business Type

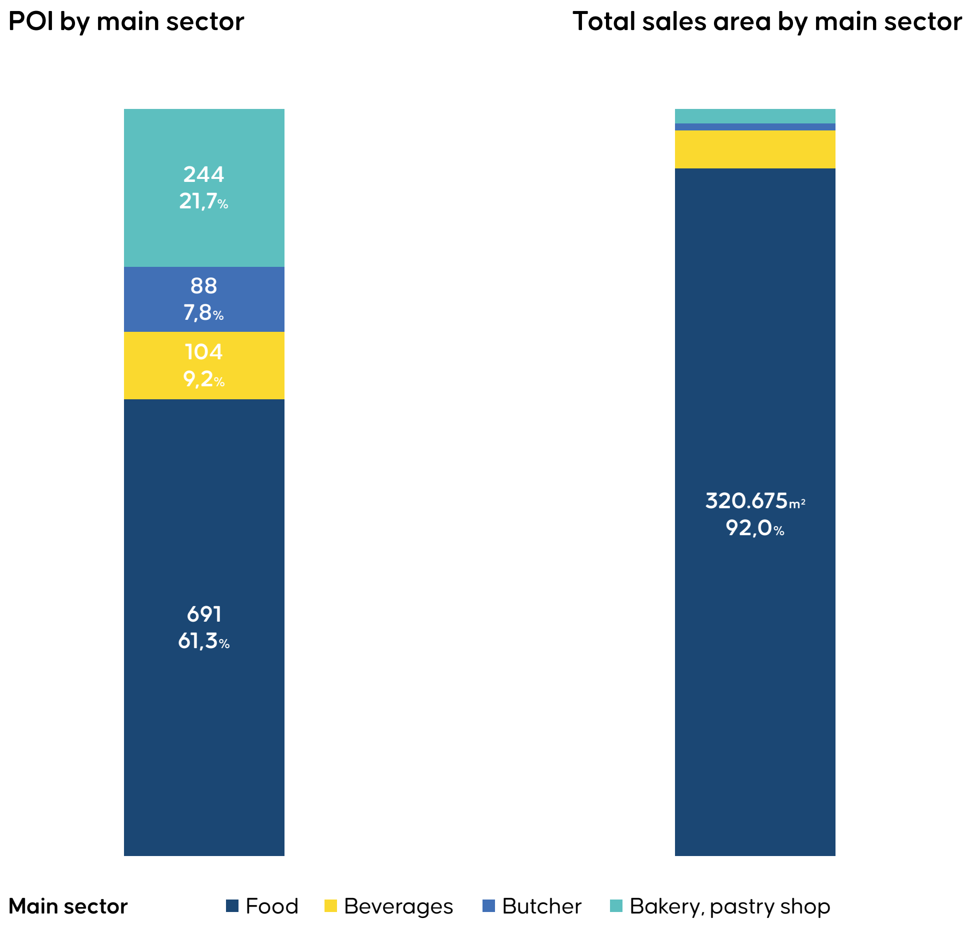
Distribution of Retail Establishments and Sales Areas

by Sector



Distribution of Retail Establishments and Sales Areas

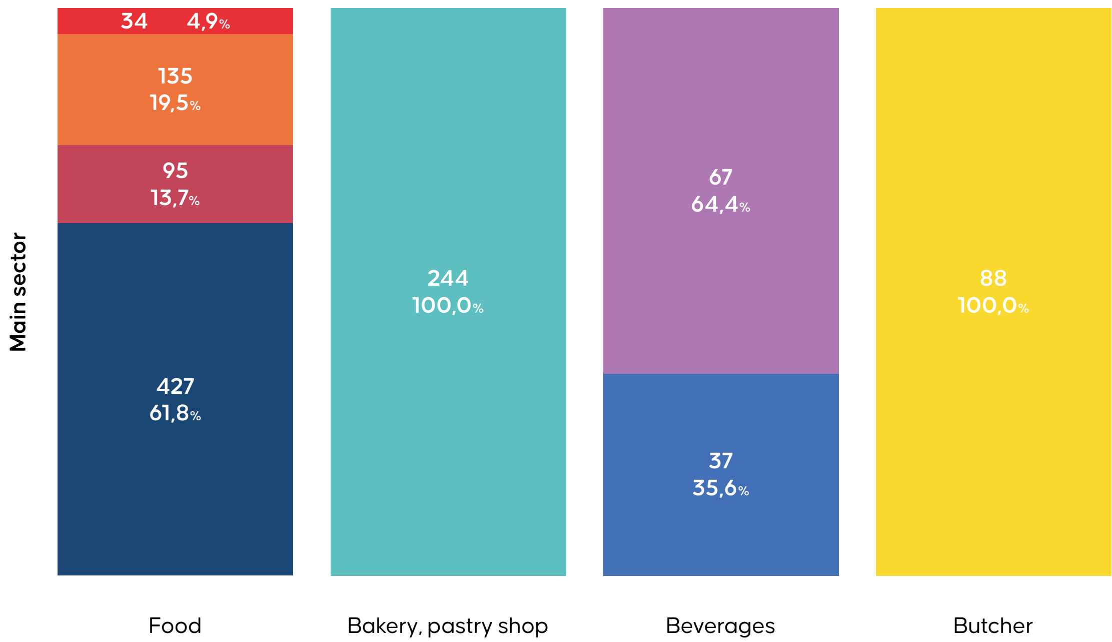
by Main-Sectors



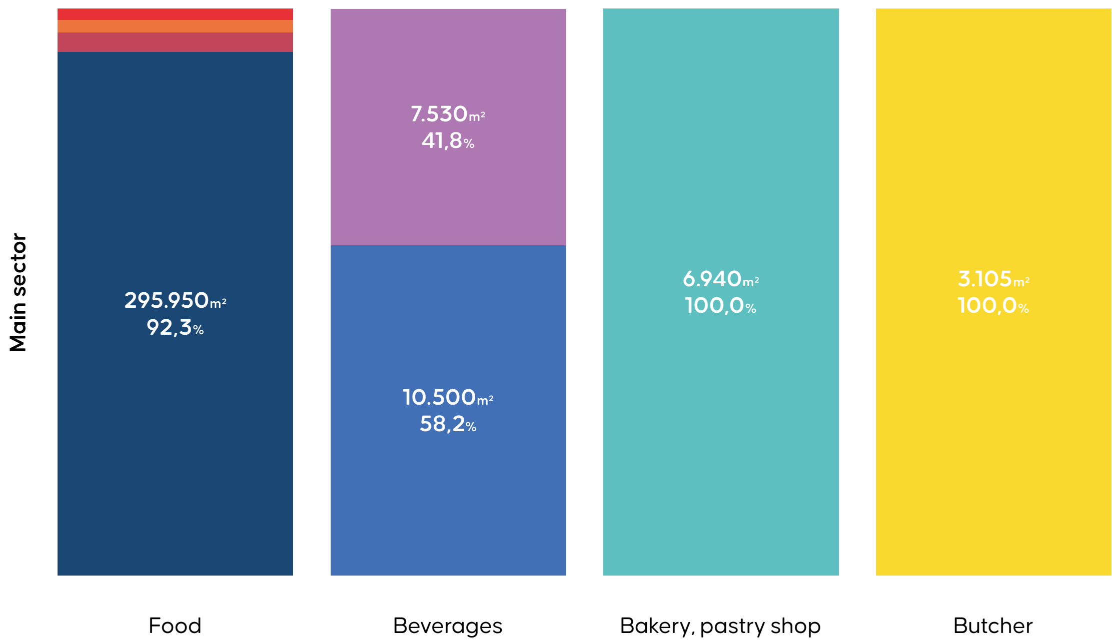
Distribution of Retail Establishments and Sales Areas

by Main and Sub-Sectors

POI by main, sub-sector

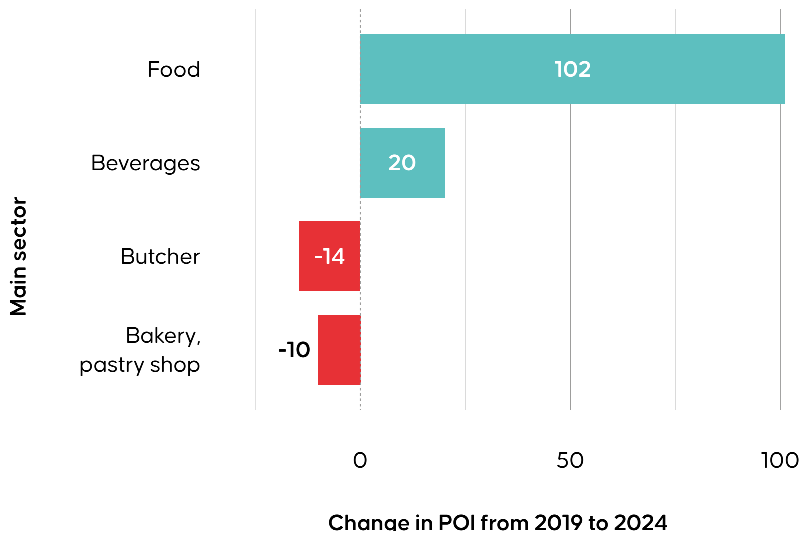


Total sales area by main, sub-sector

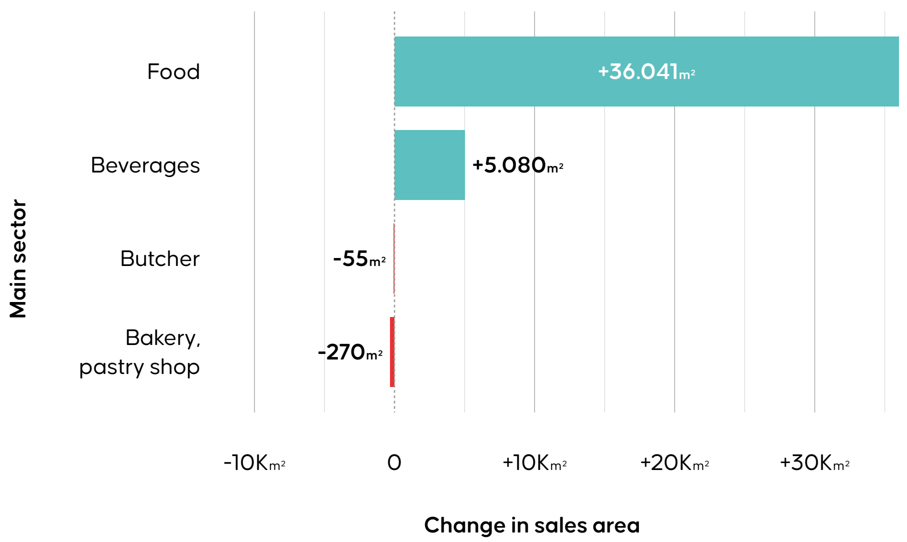


Main sector General food, International food, Specialized food, Organic shop, farm shop, Beverages, Wine, spirits, Butcher, Bakery, pastry shop

Development of the Number of Retail Establishments
by Sector



Development of Sales Areas
by Main and Sub-Sectors



Distribution of General Food Retail Establishments

by Business Type

Hypermarket:	Supermarket:	Hard Discount:	Small Supermarket:
6	105	30	283

Distribution of General Food Retail Sales Areas

by Business Type

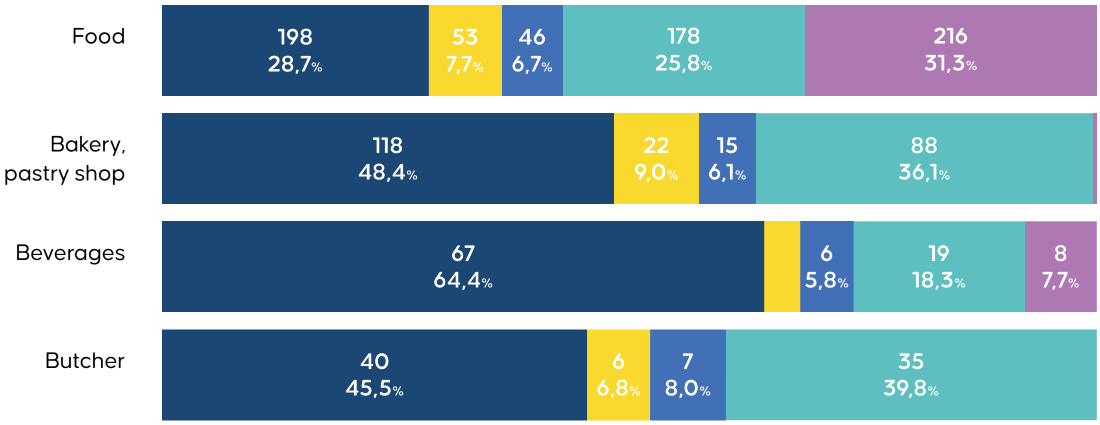
Hypermarket:	Supermarket:	Hard Discount:	Small Supermarket:
68,280m²	158,621m²	33,100m²	35,679m²

Explore the Interactive Map

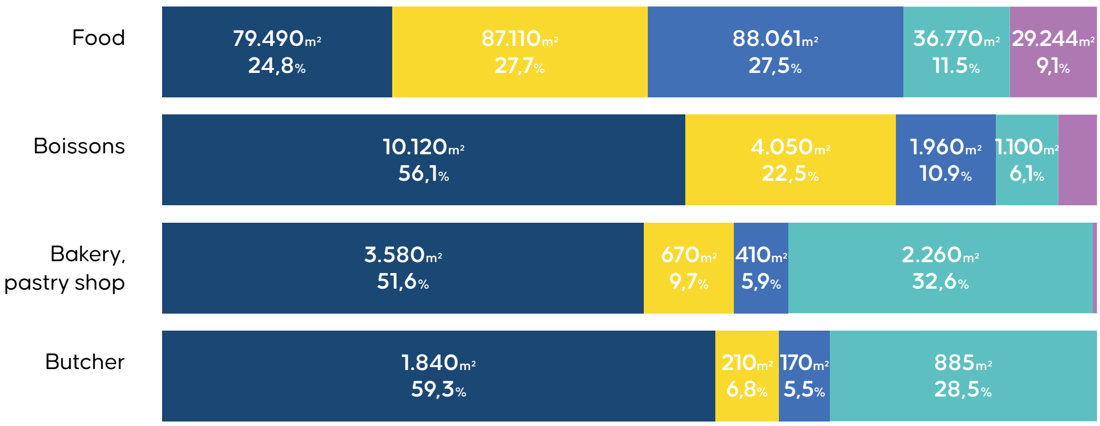
Distribution of Retail Establishments and Sales Areas

by Location Category and Sector

POI by main sector, location



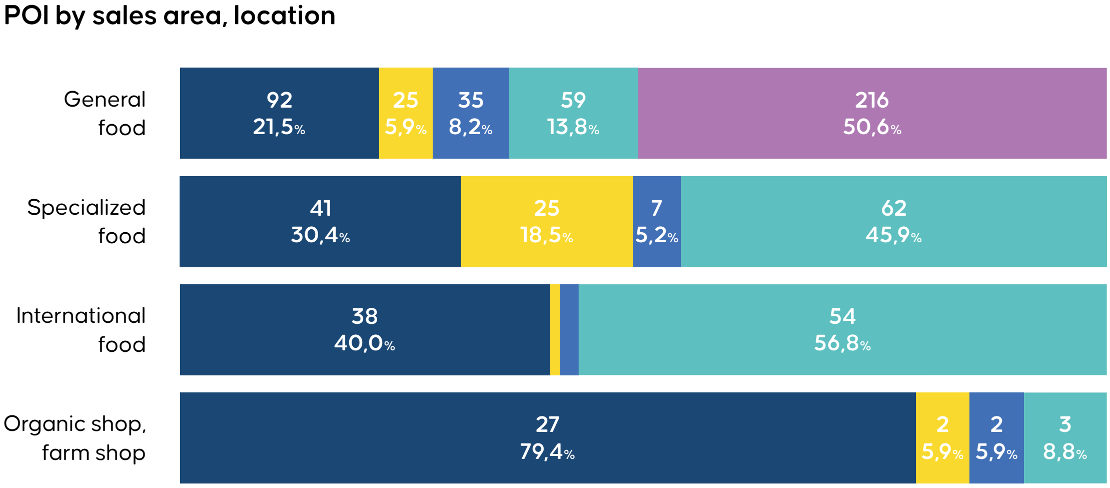
Total sales area by main sector, location

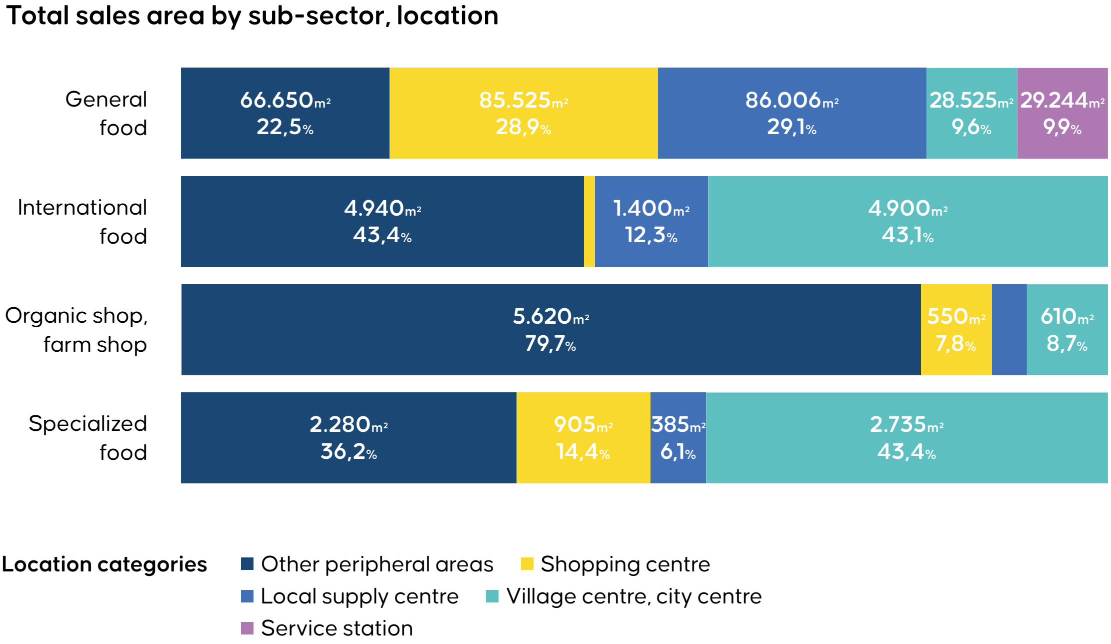


Location categories
- Other peripheral areas
- Shopping centre
- Local supply centre
- Village centre, city centre
- Service station

Distribution of Retail Establishments and Sales Areas in the Food Retail Secto

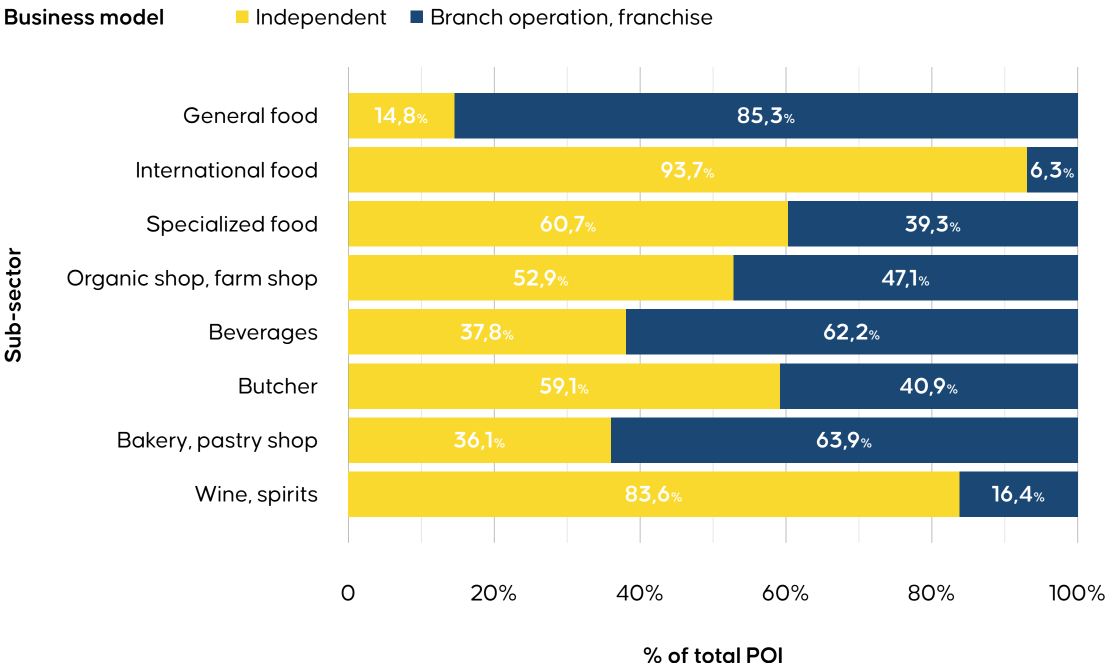
by Location Category and Sub-Sector





Distribution of Sub-Sectors

by Business Model (based on 1,127 establishments)



Distribution of Retail Establishments

by Location Category (based on 1,127 establishments)

Village and City: 320 POI

Shopping Center: 159 POI

Periphery: 423 POI

Gas Station: 225 POI

Distribution of Sales Areas

by Location Category (based on 348,750 m²)

Village and City:
41,015 m²

Shopping Center:
182,641m²

Periphery:
95,030m²

Gas Station:
30,064m²

06.01.02 | **Fashion & Beauty**

	Main Sector	Sub-Sector
119 POI 6,965 m^2	**Watches, Jewelry**	-
67 POI 8,685 m^2	**Perfumes, Cosmetics**	-
78 POI 8,430 m^2	**Parapharmaceuti-cals, Drugstores**	• CBD, Supplements • Parapharmaceutical products • Drugstores
660 POI 206,880 m^2	**Clothing, Footwear, Leather Goods**	• Shoes • Lingerie • Leather goods • Specialty fashion • Clothing

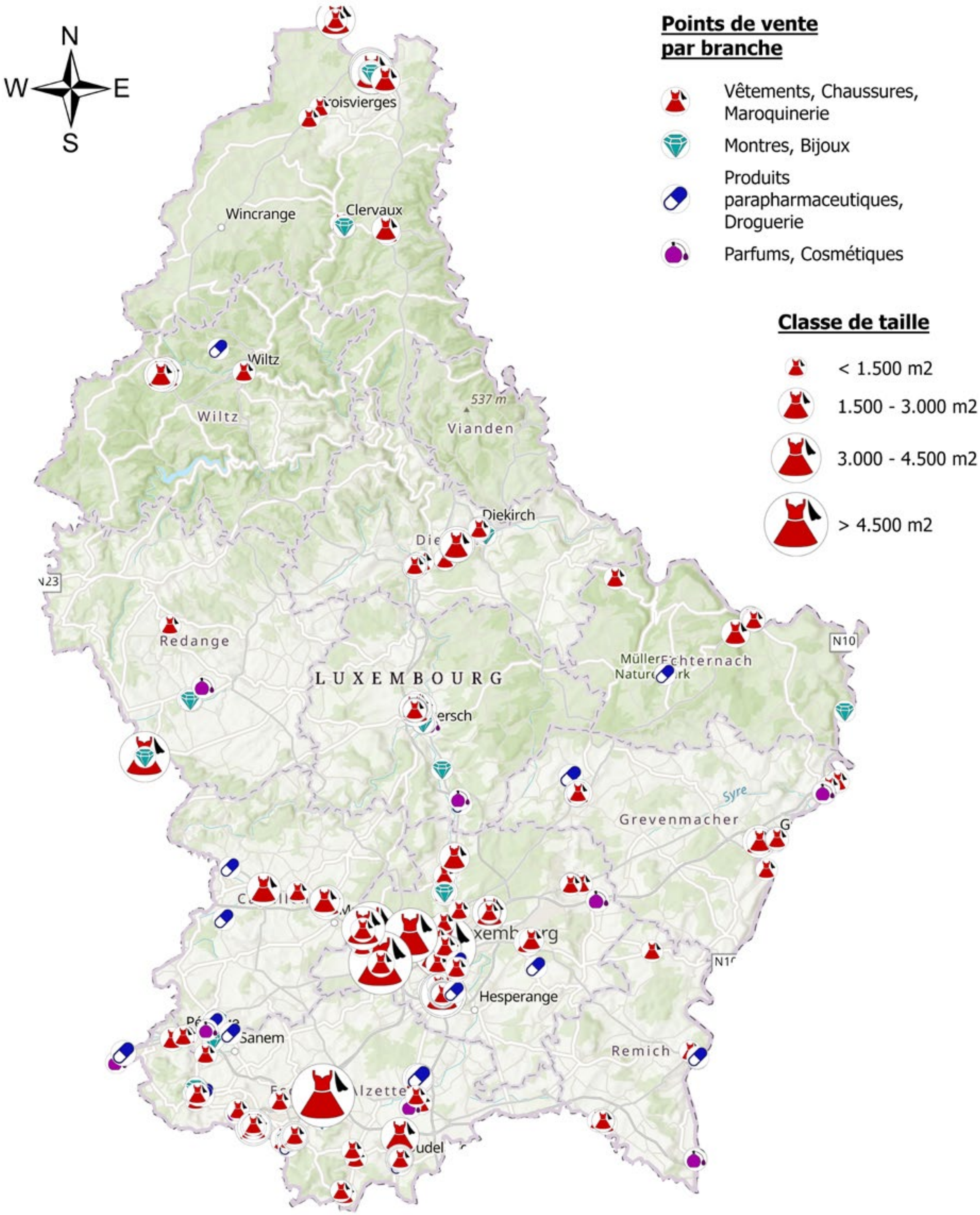
Quick Overview of the "Fashion & Beauty" Category

- Net revenue (2024): **≈ €1,488 billion**
  (own calculations; source: STATEC)
- Number of retail establishments: **924 (-10.0% since 2019)**
- Share of total retail businesses: **28.3%**
- Total sales area: **230,960m² (+0,4% since 2019)**
- Share of total retail sales area: **20.8%**
- Sales area per capita: **0.34 m²**
- Number of specialty stores: **119**
- Chain store penetration: **59.4% (based on 924 retail establishments)**
- Share of businesses with their own online store: **64.9% (based on 924 establishments)**

Explore the "Fashion & Beauty" Category by Sector and Store Size

Overview of the category

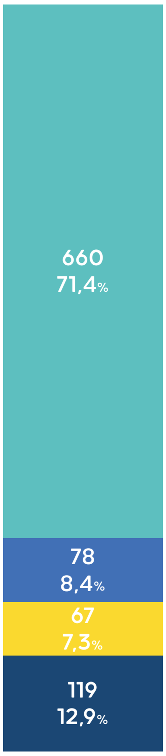
by sector and size class



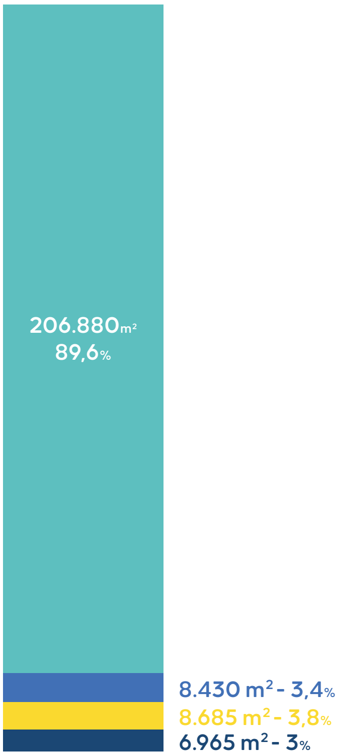
Distribution of retail establishments and sales areas

by sector

Total number of POI by main sector



Total sales area by main sector

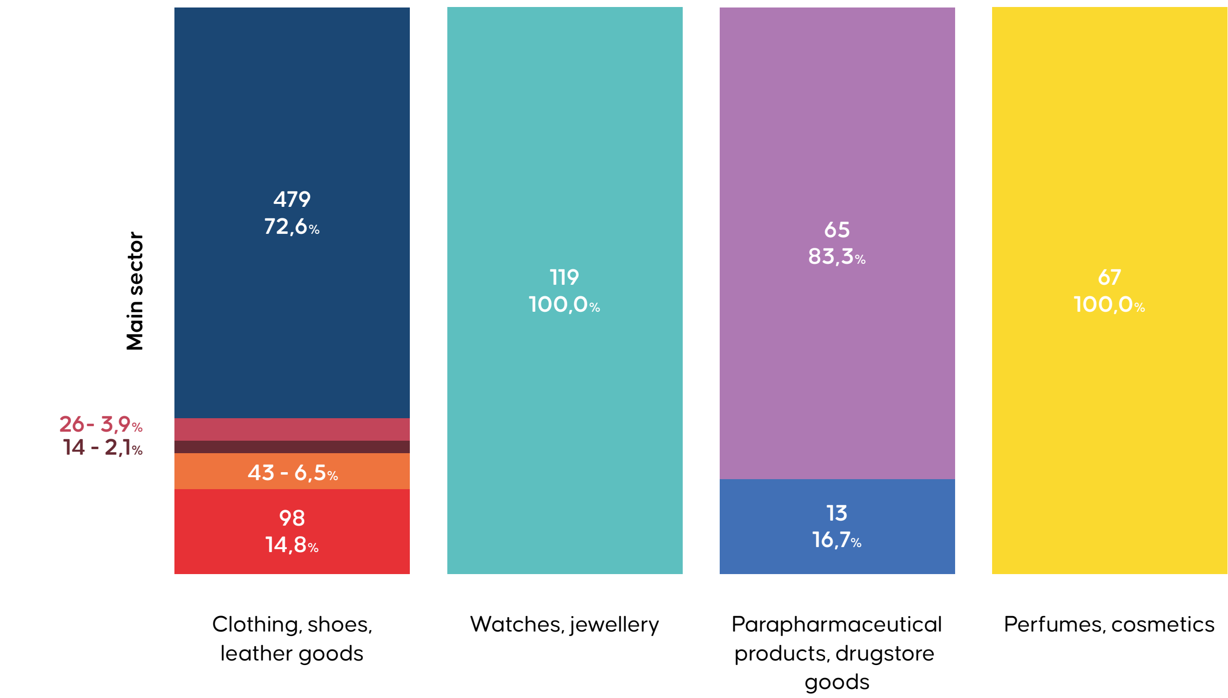


Main sector

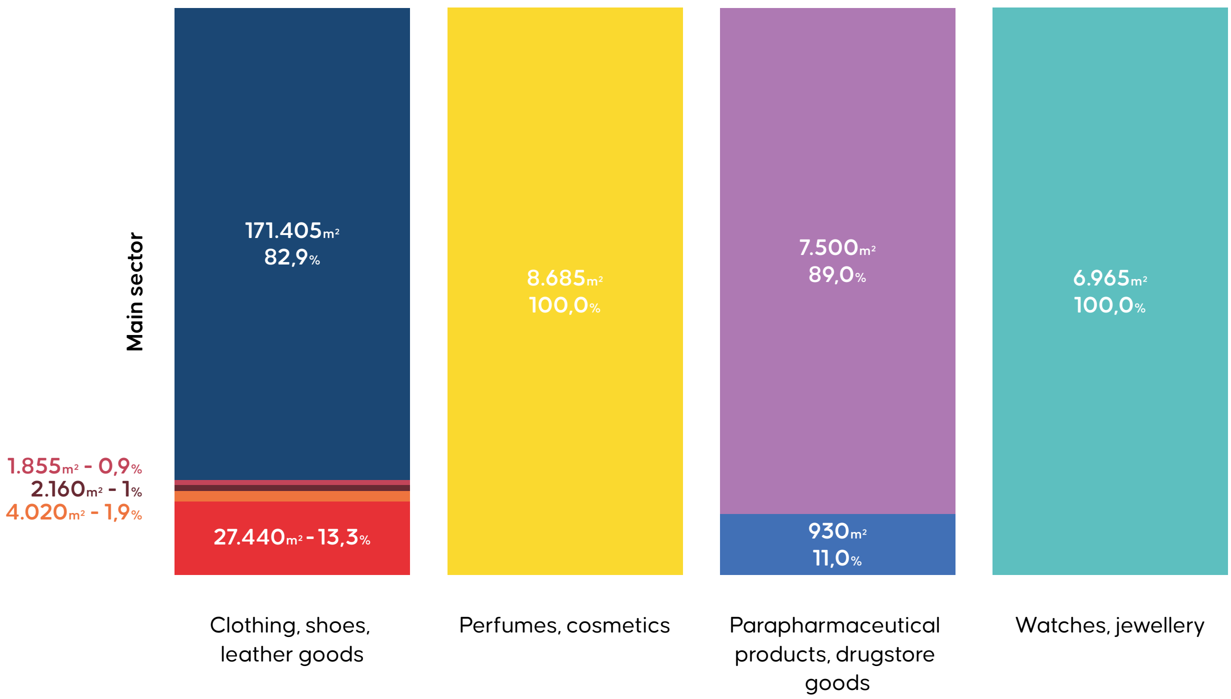
- Watches, jewellery
- Perfumes, cosmetics
- Parapharmaceuticals, drugstore products
- Clothing, shoes, leather goods

Distribution of retail establishments and sales areas
by sub-sector

Total number of POI by main, sub-sector



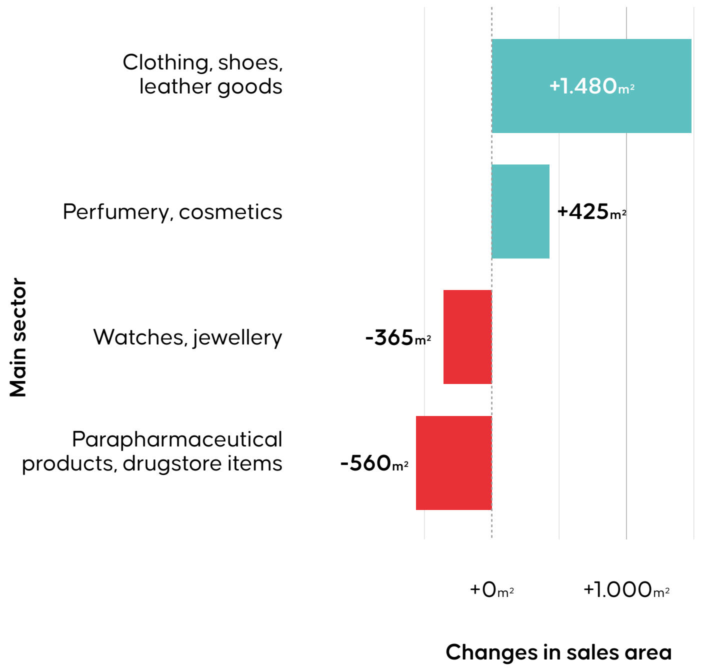
Total sales area by main, sub-sector



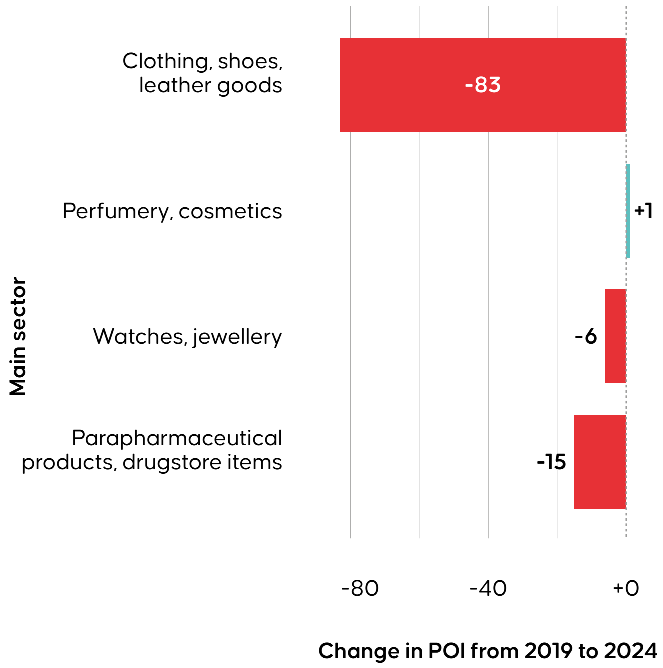
Main sector Shoes, Underwear, Leather goods, Specialized fashion, Clothing, Watches, jewellery, Parapharmaceutical products, drugstore items, CBD products, dietary supplements, Perfumes, cosmetics

Development of the number of establishments and sales areas

by sector (2019–2024)



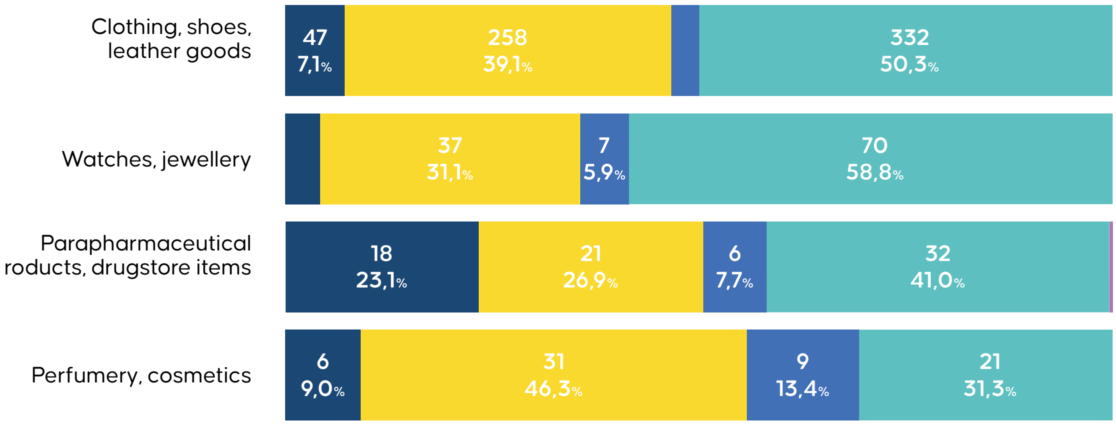
Change in POI from 2019 to 2024, development of sales area by main sector



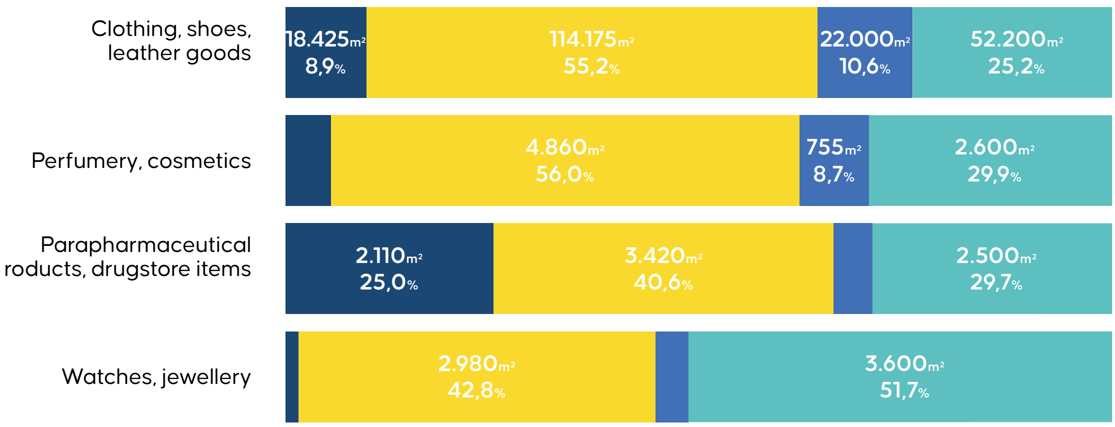
Distribution of retail establishments and sales areas

by location category and sector

POI by main sector, location



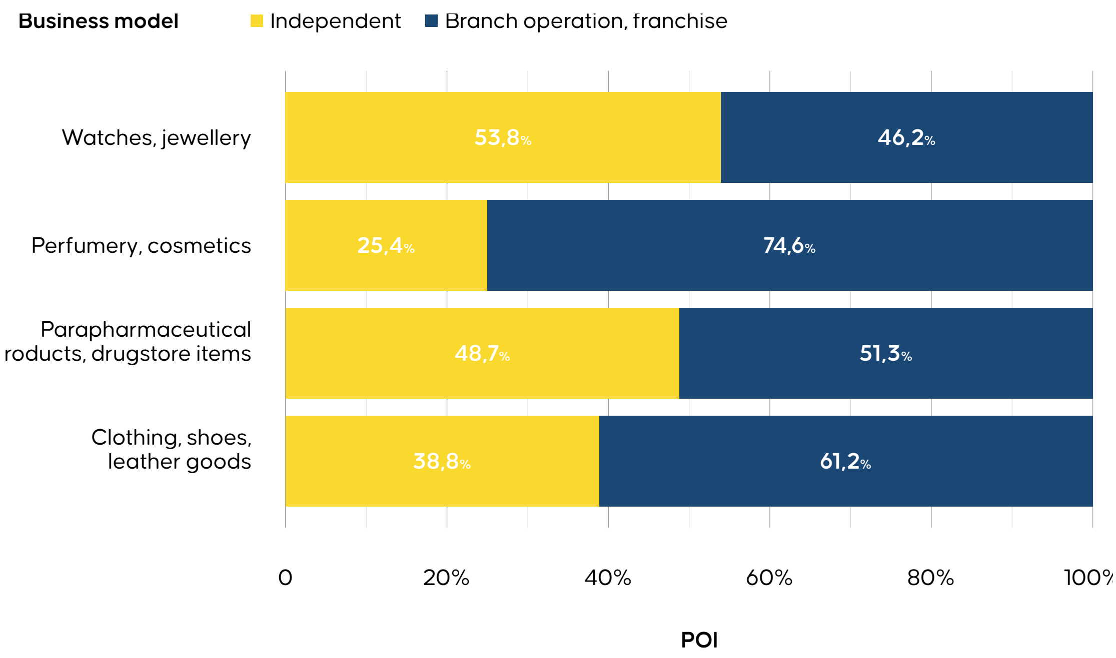
Total sales area by main sector, location



Location categories
- Other peripheral areas
- Shopping centre
- Local supply centre
- Village centre, city centre
- Service station

Distribution of sectors

by business model (based on 924 establishments)



06.01.03 | **Home Equipment**

	Main Sector	Sub-Sector
34 POI 3,220 m²	Antiques, Art Objects	-
214 POI 178,564 m²	DIY Products, Glassware, Porcelain, Ceramics, Household Goods	• DIY Products, Glassware, Porcelain, Ceramics, Household Goods • DIY Stores
176 POI 168,190 m²	Furniture, Home Accessories	• Home Accessories • Kitchens, Bathrooms • Mattresses, Bedding • Furniture
30 POI 3,690 m²	Home Textiles	-

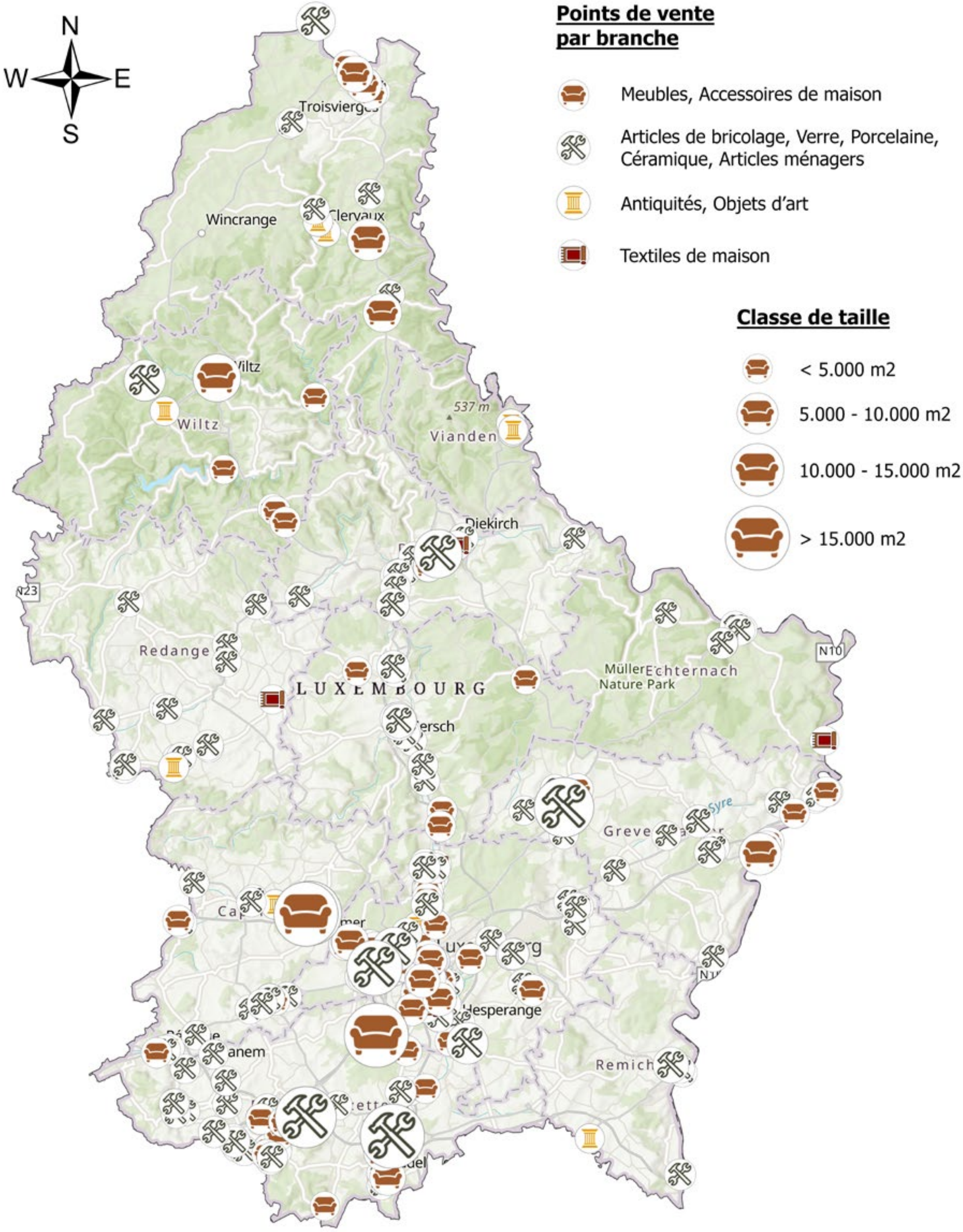
Quick Overview of the "Home Equipment" Category

- Net revenue (2024): **≈ €1,272 billion**
  (own calculations; source: STATEC)
- Number of retail establishments: **454 (+8.6% since 2019)**
- Share of total retail businesses: **13.9%**
- Total sales area: **353,664m² (+1.4% since 2019)**
- Share of total retail sales area: **31.8%**
- Sales area per capita: **0.53 m²**
- Number of large-format stores (>10,000 m²): **7**
- Chain store penetration: **28.6% (based on 454 establishments)**
- Share of businesses with their own online store: **48.5% (based on 454 establishments)**

Explore the "Home Equipment" Category by Sector and Store Size

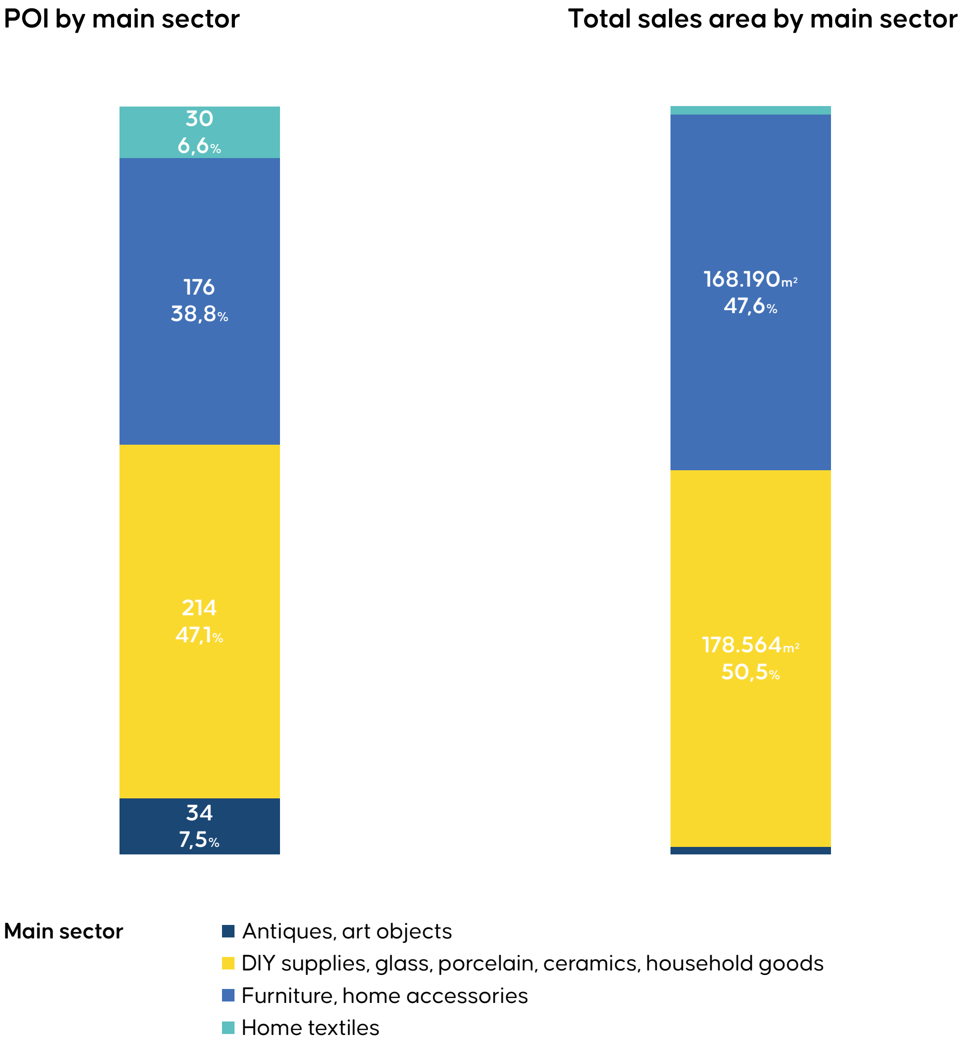
Overview of the "Home Equipment" category

by sector and store size class



Distribution of retail establishments and sales areas

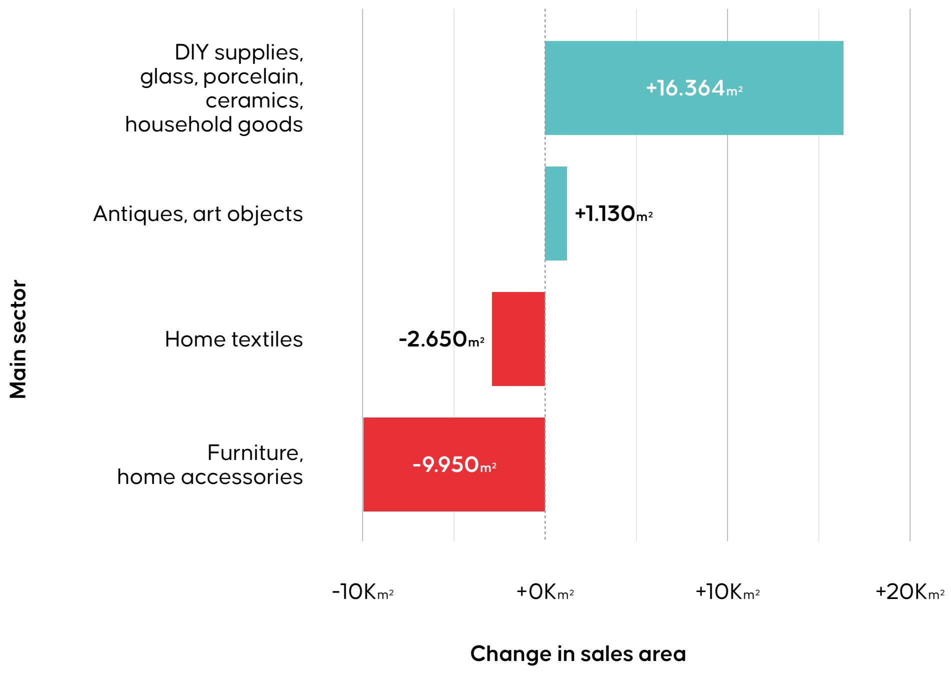
by sub-sector



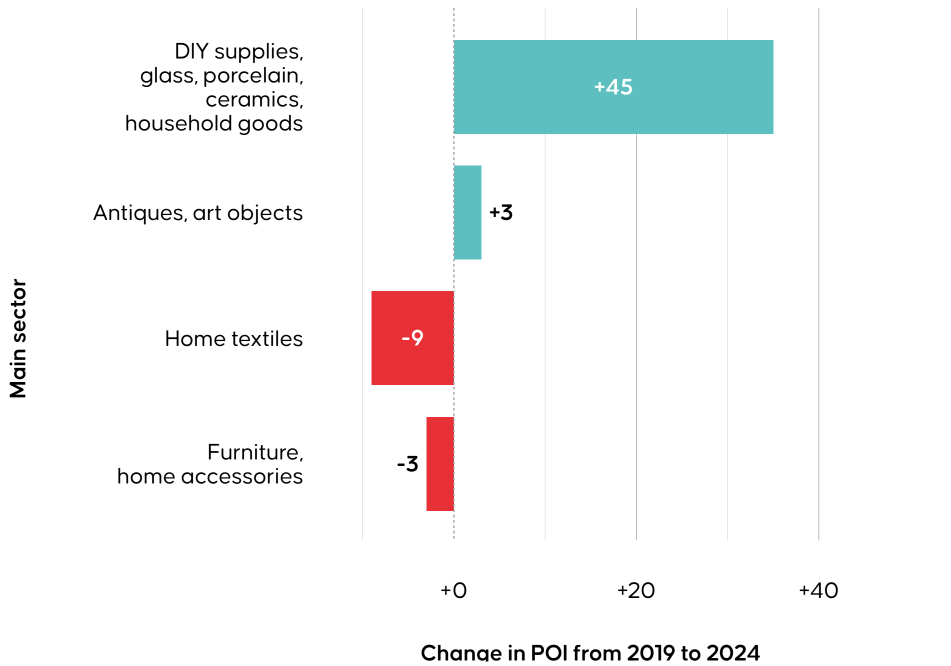
Development of the number of establishments and sales areas

by sector (2019–2024)

Change in sales area by main sector



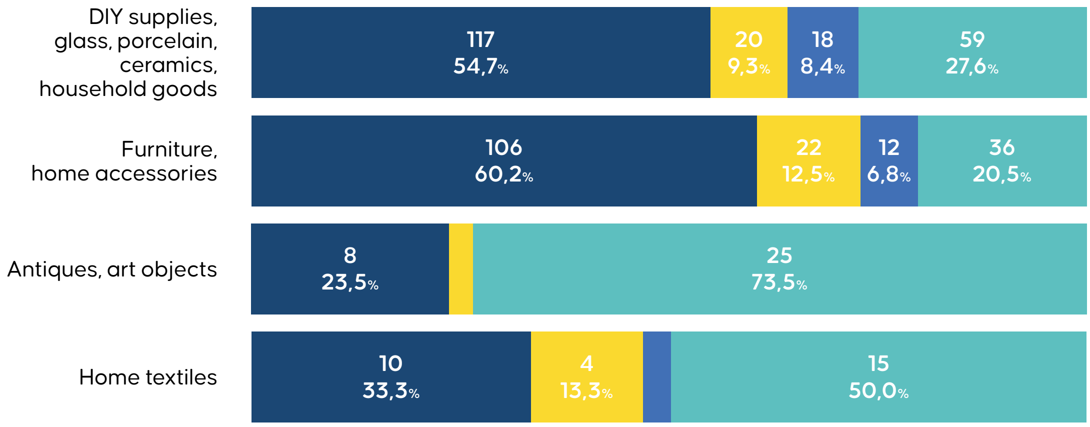
Change in POI from 2019 to 2024, change in sales area by main sector



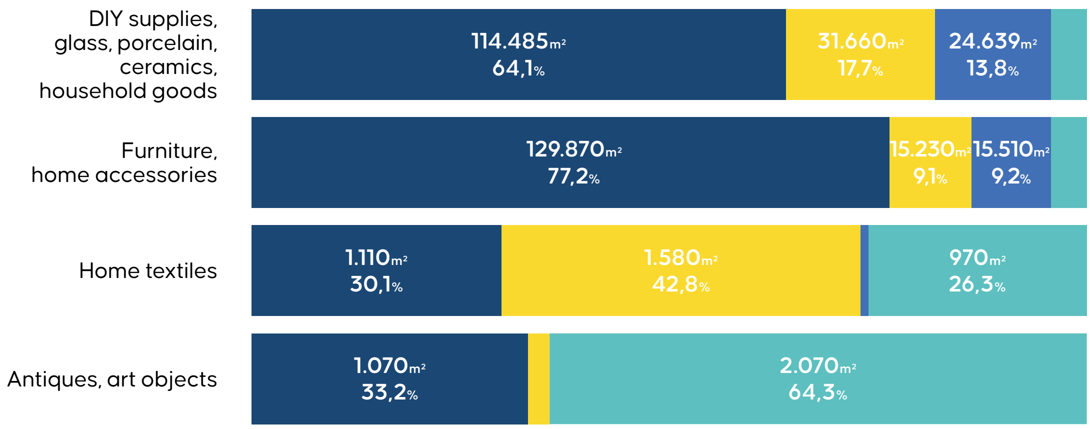
Distribution of retail establishments and sales areas

by location category and sector (based on 454 establishments / 353,664 m²)

Total number of POI by main sector, location



Total sales area by main sector, location



Location categories Other peripheral areas, Shopping centre, Local supply centre, Village centre, city centre

06.01.04 | **Leisure and Culture**

	Main Sector	Sub-Sector
113 POI 32.555 m²	**Electronics, Consumer Electronics, Computers, Photography**	-
214 POI 46.825 m²	**Sports equipment, Bikes, Hobbies**	• Sports equipment, Bikes • Instruments, Hobbies
41 POI 9.100 m²	**Jeux, Jouets**	-
129 POI 17.575 m²	**Books, Stationery, Magazines, Office supplies, Office furniture**	• Books • Magazines, Stationery, Office equipment • Office furniture
45 POI 1.705 m²	**Telecommunications**	• Telecom operator • Telecommunications

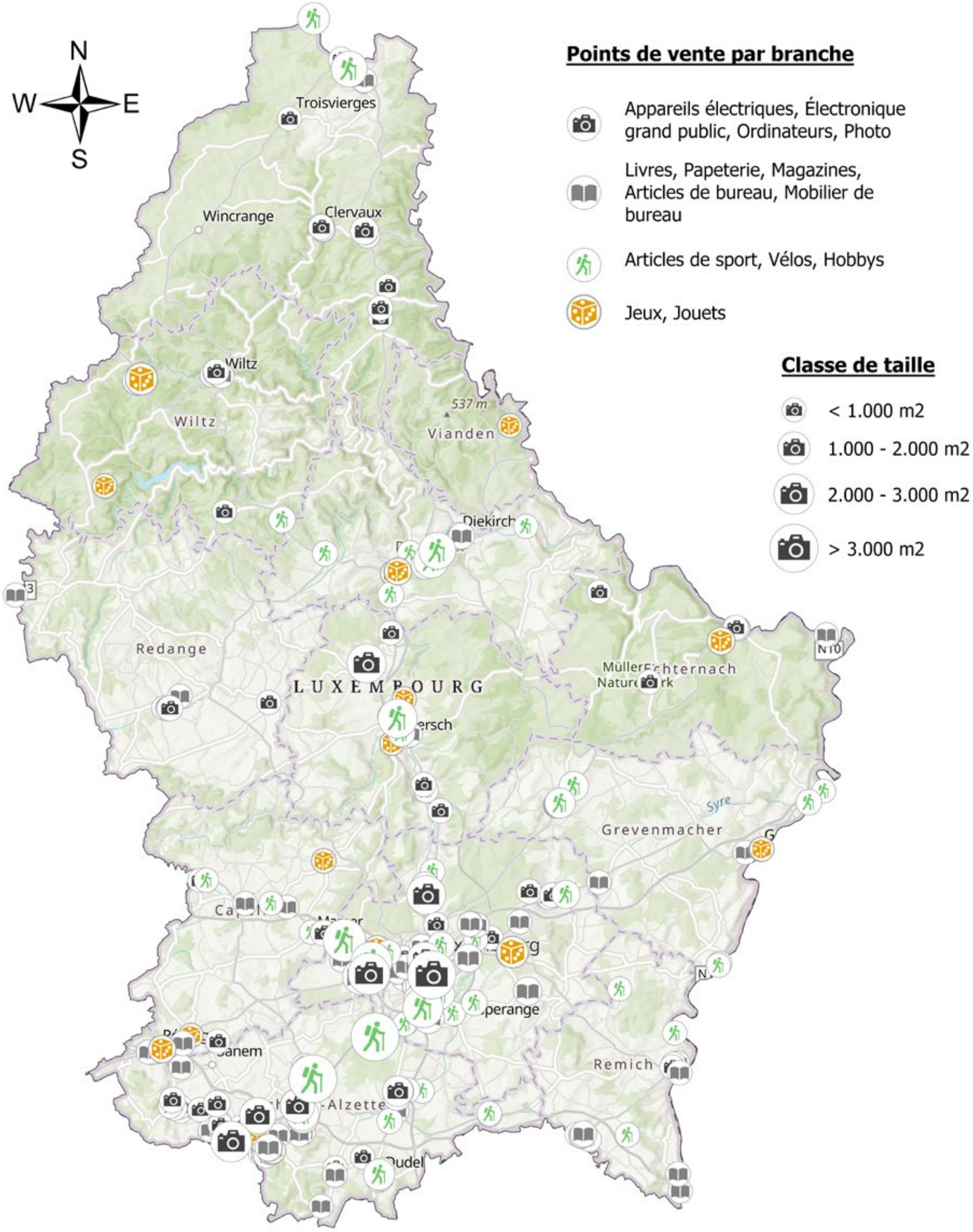
Quick Overview of the "Leisure and Culture" Category

- Net revenue (2024): **≈ €1,121 billion**
  (own calculations; source: STATEC)
- Number of retail establishments: **439 (-1.8% since 2019)**
- Share of total retail businesses: **13.5%**
- Total sales area: **107,760 m² (+4.0% since 2019)**
- Share of total retail sales area: **9.7%**
- Sales area per capita: **0.16 m²**
- Chain store penetration: **44.6% (based on 439 establishments)**
- Share of businesses with their own online store: **49.4% (based on 439 establishments)**

Explore the "Leisure and Culture" Category by Sector and Store Siz

Overview of the "Leisure and Culture" category

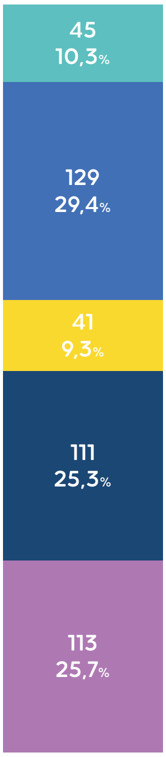
by sector and size class



Distribution of retail establishments and sales areas

by sector

POI by main sector



Total sales area by main sector

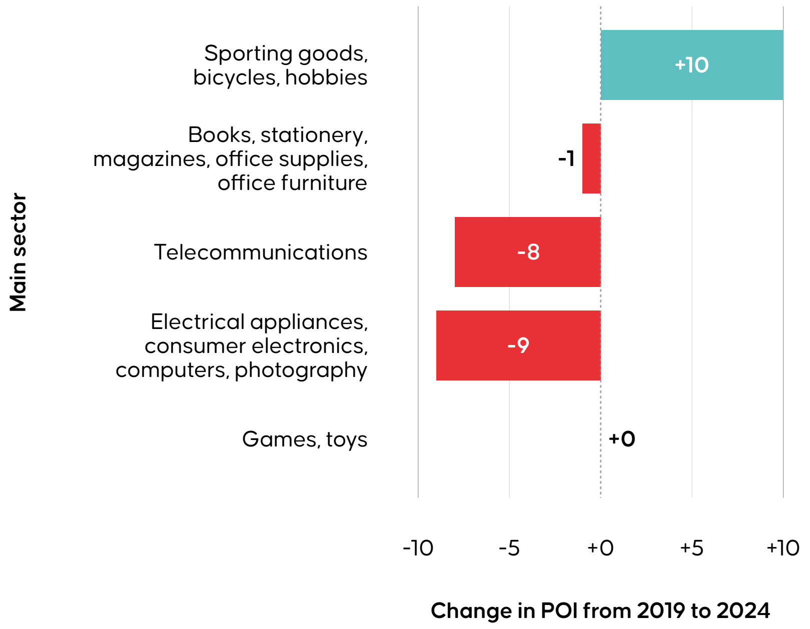
Main sector

- Electrical appliances, consumer electronics, computers, photography
- Sporting goods, bicycles, hobbies
- Games, toys
- Books, stationery, magazines, office supplies, office furniture
- Telecommunications

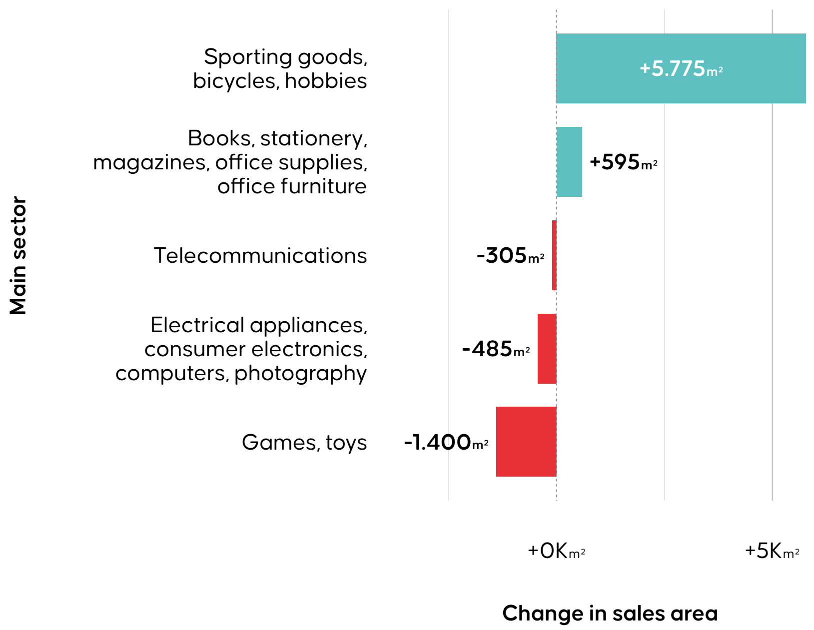
Development of the number of establishments and sales areas

by sector

Change in POI from 2019 to 2024, change in sales area by main sector



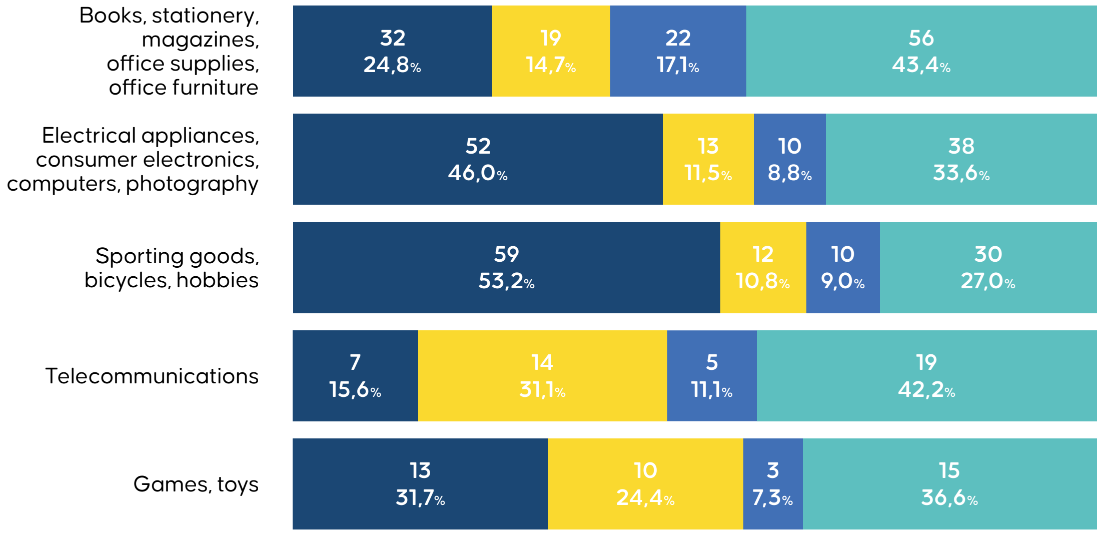
Change in sales area by main sector



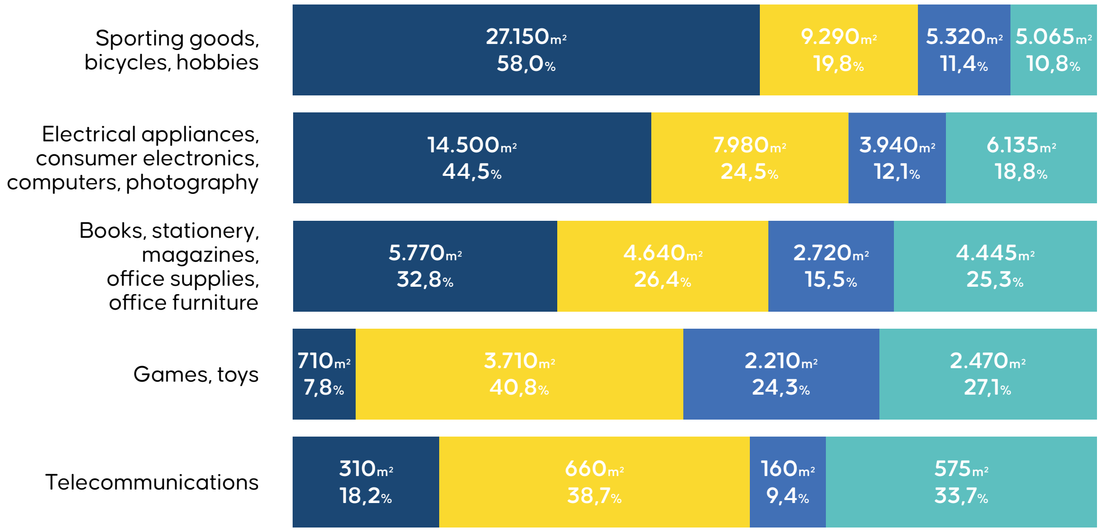
Distribution of retail establishments and sales areas

by location category and sector (based on 439 establishments / 107,760 m²)

Total number of POI by main sector, location



Total sales area by main sector, location



Location categories ■ Other peripheral areas ■ Shopping centre ■ Local supply centre ■ Village centre, city centre

06.01.05 | **Other Retail Trade**

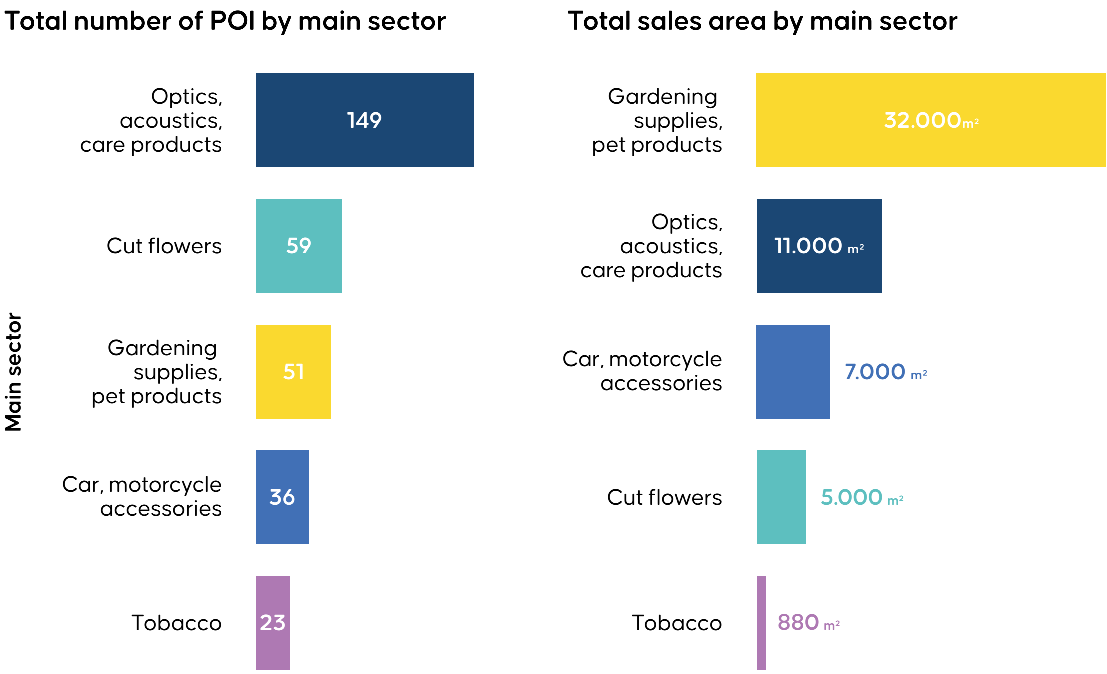
	Main Sector	Sub-Sector
36 POI 6,820 m²	**Car and Motorcycle Accessories**	-
59 POI 4,570 m²	**Cut Flowers**	-
51 POI 32,235 m²	**Garden Supplies, Pet Products**	• Pet Products • Garden Supplies
149 POI 11,400 m²	**Optics, Hearing Aids, Orthopedic and Health Products**	• Hearing Aids • Orthopedic and Health Products • Optics
23 POI 880 m²	**Tobacco Products**	-

Quick Overview of the "Other Retail Trade" Category

- Net revenue (2024): **Not Available**
- Number of retail establishments: **318 (+4.3% since 2019)**
- Share of total retail businesses: **9.8%**
- Stores with more than 1,000 m² of sales area: **6**
- Total sales area: **55,905 m² (-3.1% since 2019)**
- Sales area per capita: **0.08 m²**
- Chain store penetration: **44.7% (based on 318 establishments)**
- Share of businesses with their own online store: **39.6% (based on 318 establishments)**

Distribution of retail establishments and sales areas

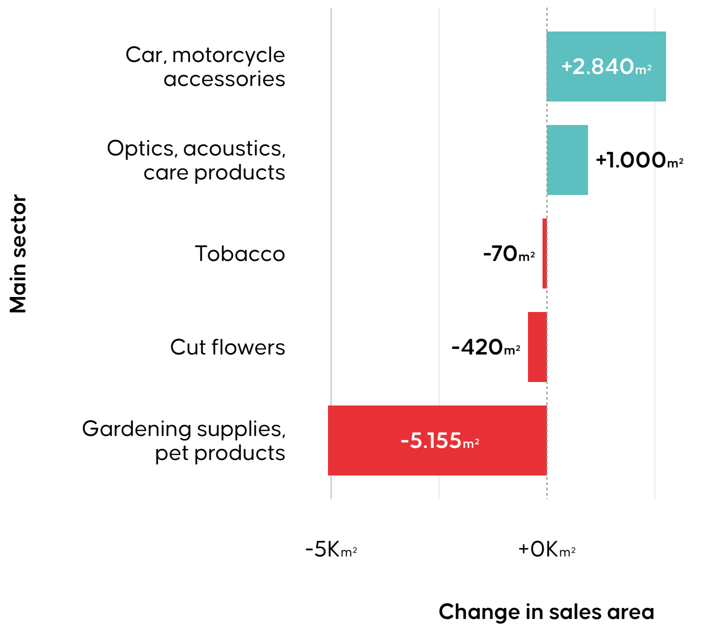
by sector



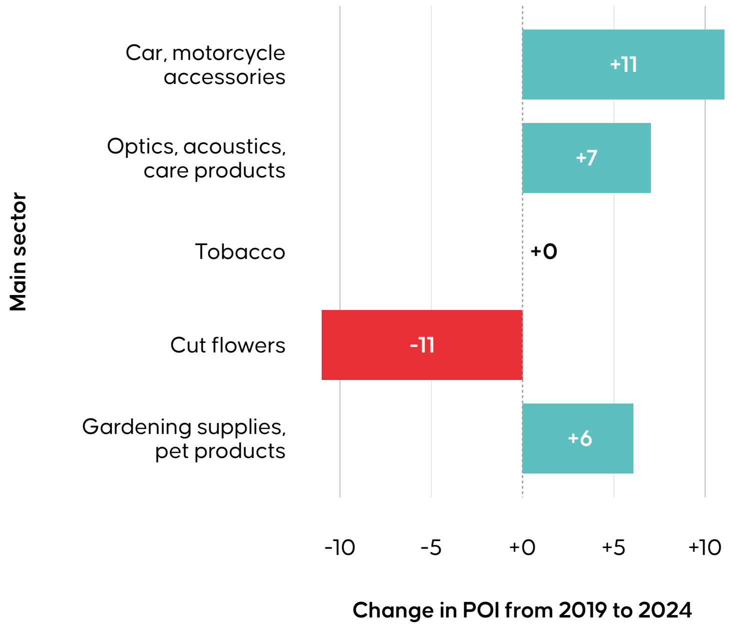
Development of the number of establishments and sales areas

by sector

Change in sales area by main sector



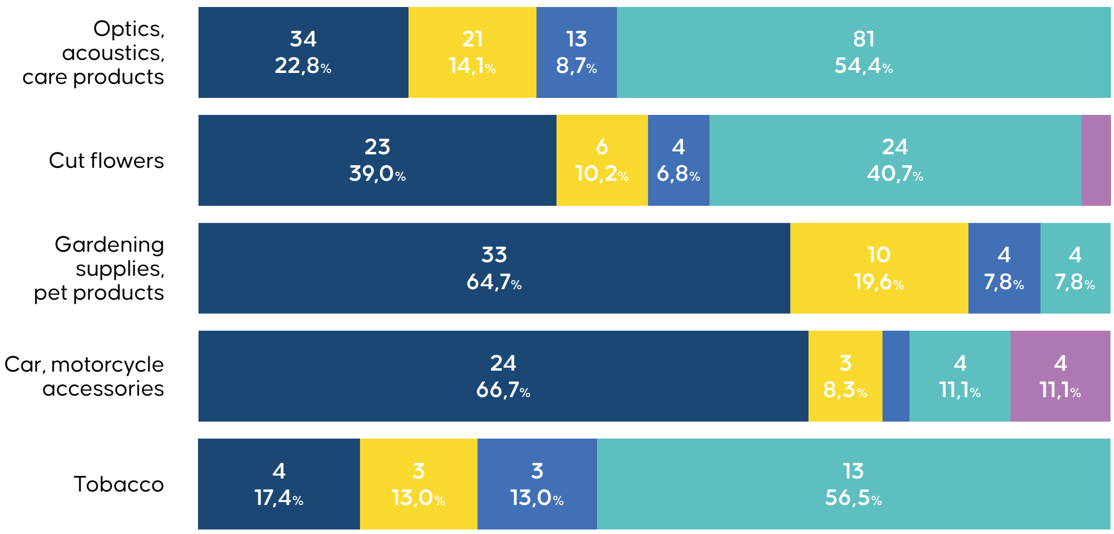
Change in POI from 2019 to 2024, change in sales area by main sector



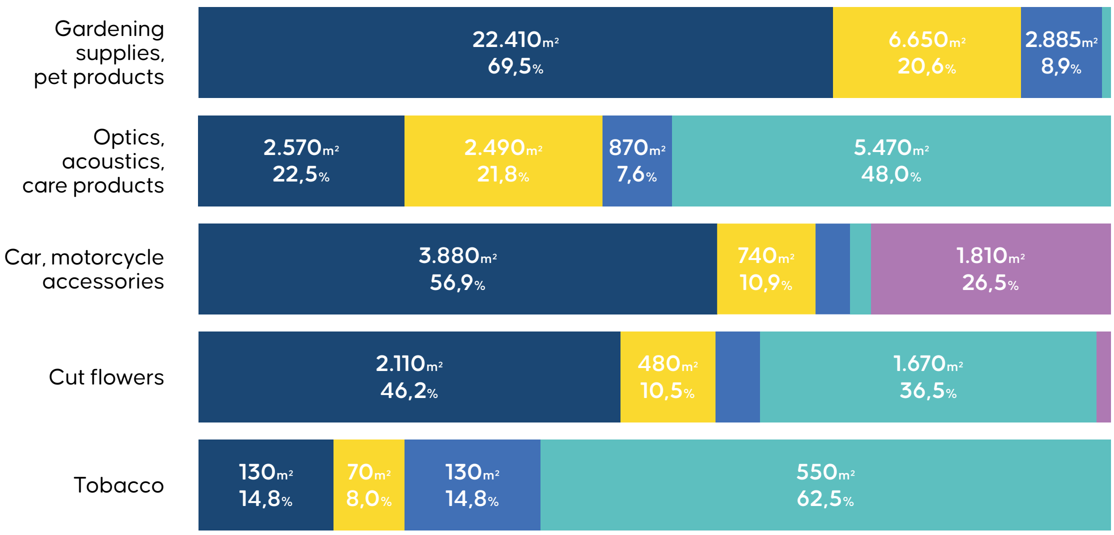
Distribution of retail establishments and sales areas

by location category and sector (base: 439 establishments / 107.760 m²)

Total number of POI by main sector, location



Total sales area by main sector, location



Location categories
- Other peripheral areas
- Shopping centre
- Local supply centre
- Village centre, city centre
- Service station

06.02 | **The Horeca Sector**

Explore the Horeca Sector by Branch

Quick Overview of the Horeca Sector

- Number of employees: **23,800 (+9.2% since 2020)**
- Share of total employees and self-employed: **4.6%**
- Number of establishments: **2,575 (+2.5% since 2019)**
- Number of establishments in Luxembourg canton: **966 (37.5% of the total)**
- Number of establishments in Esch-sur-Alzette canton: **698 (27.1% of the total)**
- Percentage of establishments located in city centers (n = 21 centers): **34.6% (891 POIs)**
- Overnight stays (2023): **3.49 million → +24.5% compared to 2022**

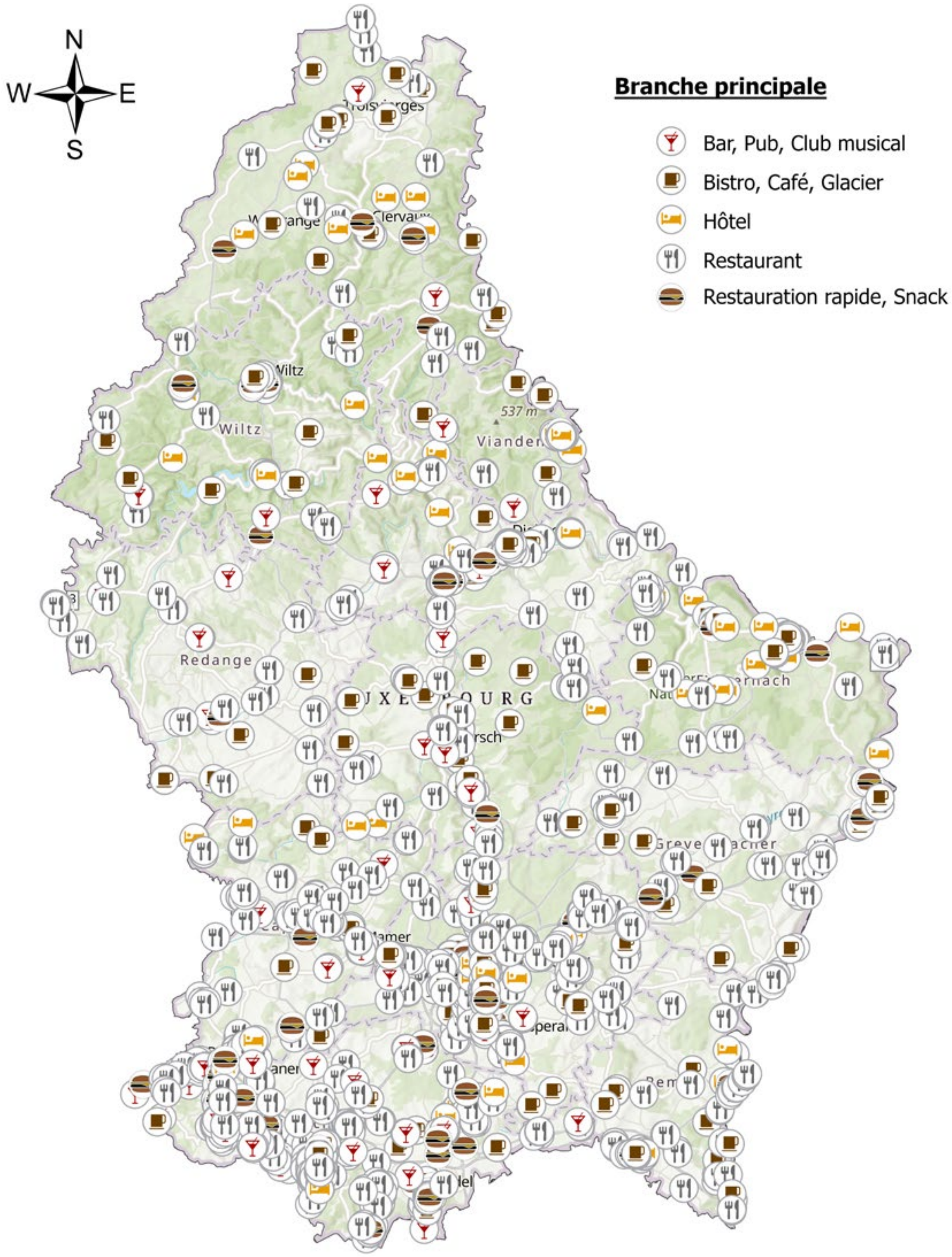
Distribution of Horeca Establishments

by Location Category (base = 348.750 m2)

Restaurant:	Fast-food / Takeaway:	Bistro, Café, Ice Cream Parlor:	Bar, Pub, Music Club:	Hotel:
1.261	376	476	265	197

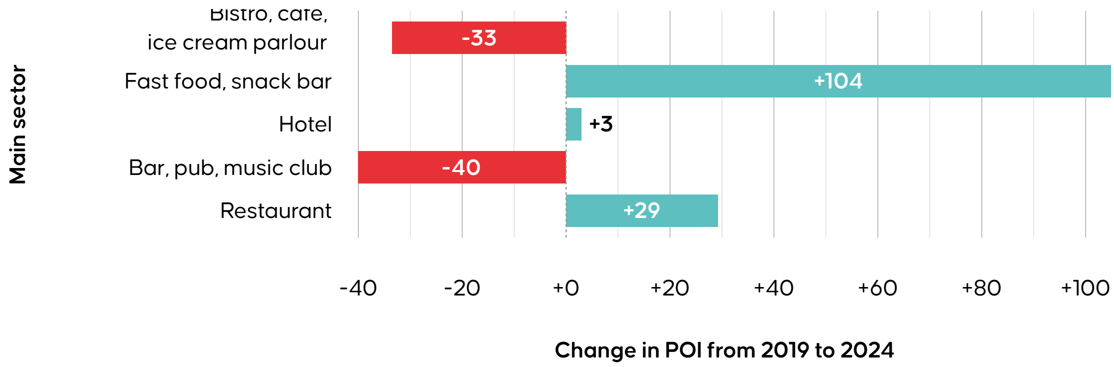
Overview of the Horeca sector

by branch



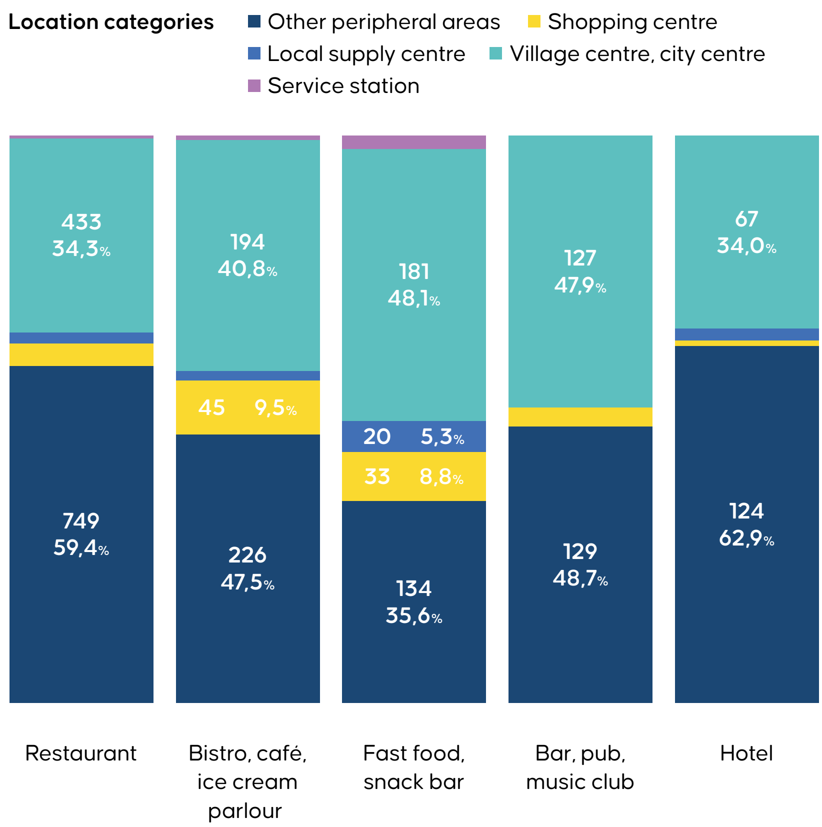
Development of the number of establishments

by branch



Distribution of establishments

by location category and branch



06.03 | **Vacant properties**

Regarding data on vacant premises, it should be noted that vacant surfaces have not been recorded across the entire country, but only at sites of commercial interest. Only those properties that, in the opinion of experts, are suitable in the short term for future use in retail, gastronomy, crafts, or the service sector—or whose future use promises revitalizing effects for a site—were included in the statistics. For methodological reasons, vacant residential properties were not included.

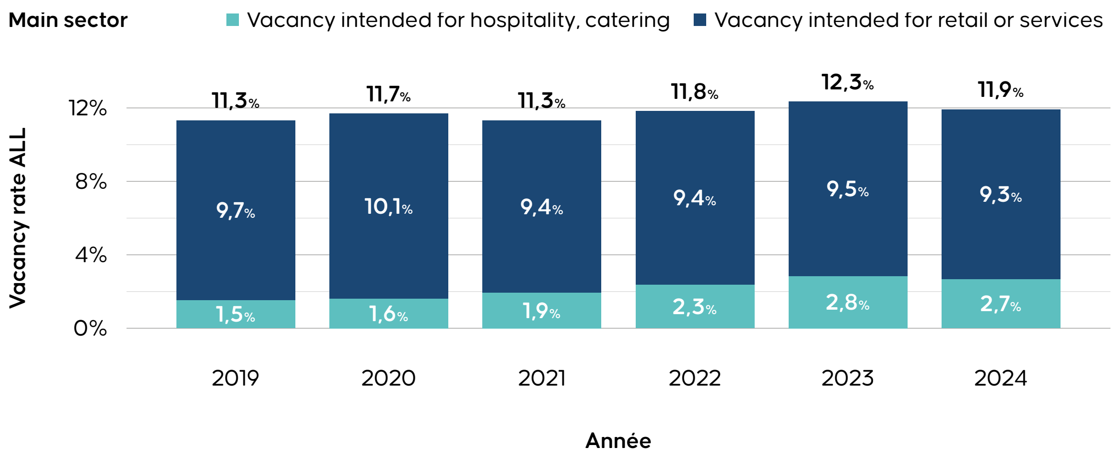
Vacant premises must be distinguished according to their appropriate future use and are therefore classified into two types:

- **Type 1: Retail/service** – refers to future use that is particularly suitable, at least in the short term, for retail and service businesses.
- **Type 2: Horeca** – refers to future use that, at least in the short term, is particularly suited to gastronomic activities due to the nature of the space.

**The vacancy rate describes the proportion of vacant spaces in relation to all other retail, gastronomy, and service establishments in the same territorial unit.*

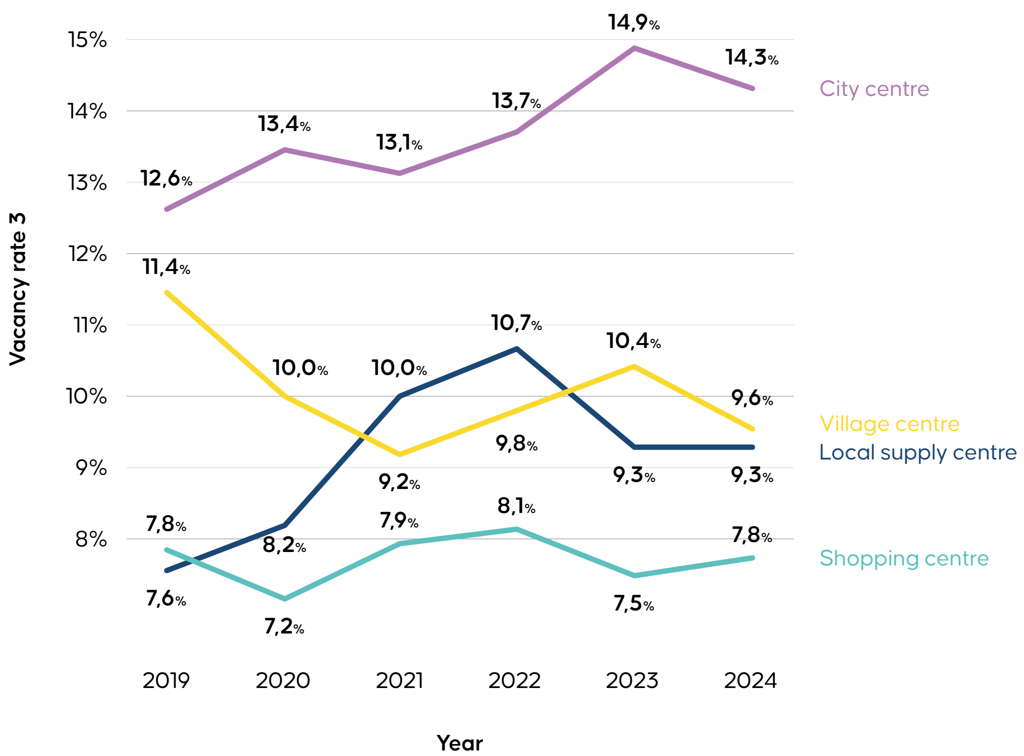
Development of the national vacancy rate

by vacancy type (2019-2024)



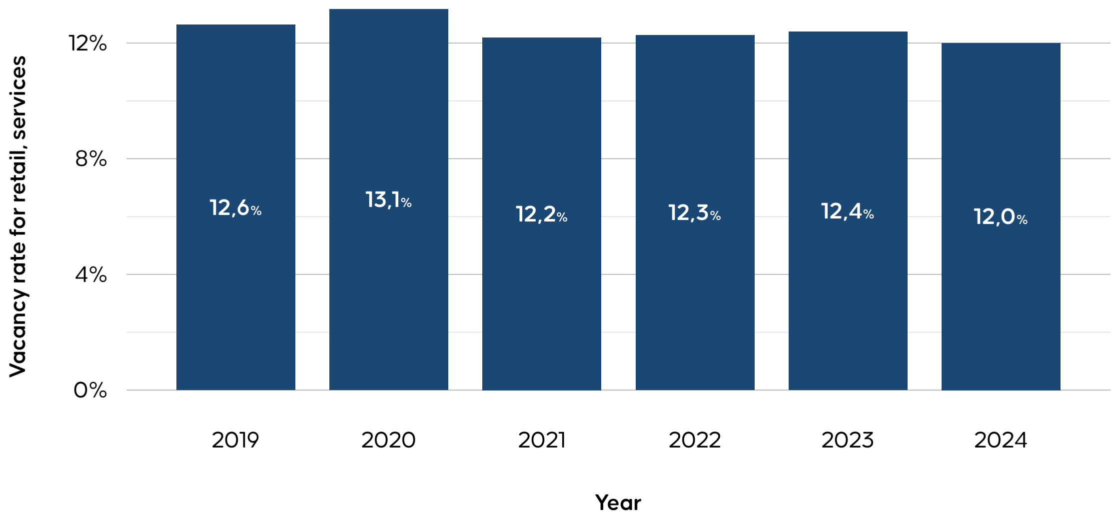
Development of the vacancy rate

by location category (2019-2024)



Development of vacancy rates

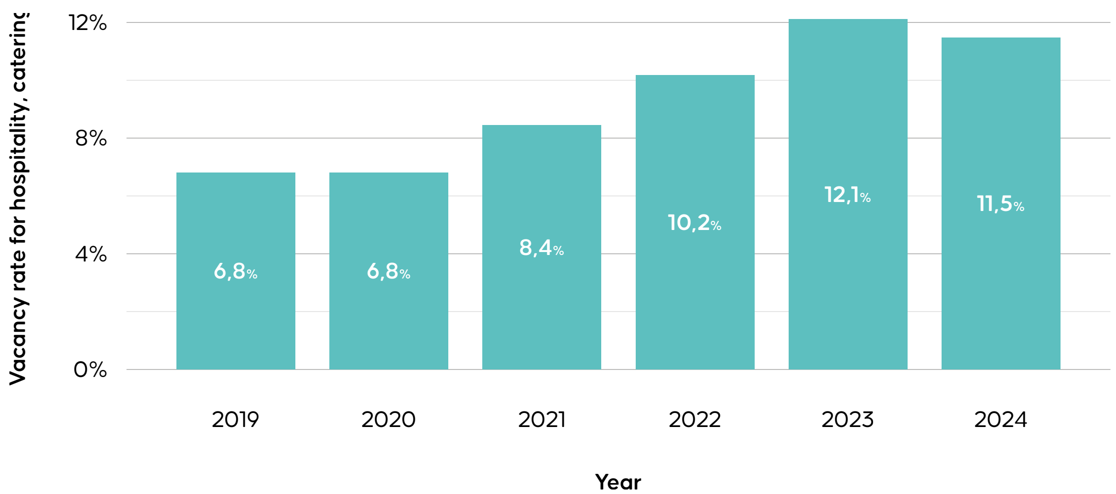
*for retail or service use (2019–2024)**



$$* \quad \frac{\text{"Service Vacancies"}}{(\text{"Service"} + \text{"Service Vacancies"})}$$

Development of vacancy rates

*for Horeca use (2019–2024)**



$$* \quad \frac{\text{"Horeca Vacancies"}}{(\text{"Horeca"} + \text{"Horeca Vacancies"})}$$

07 | Geographic Distribution of the Commercial Landscape

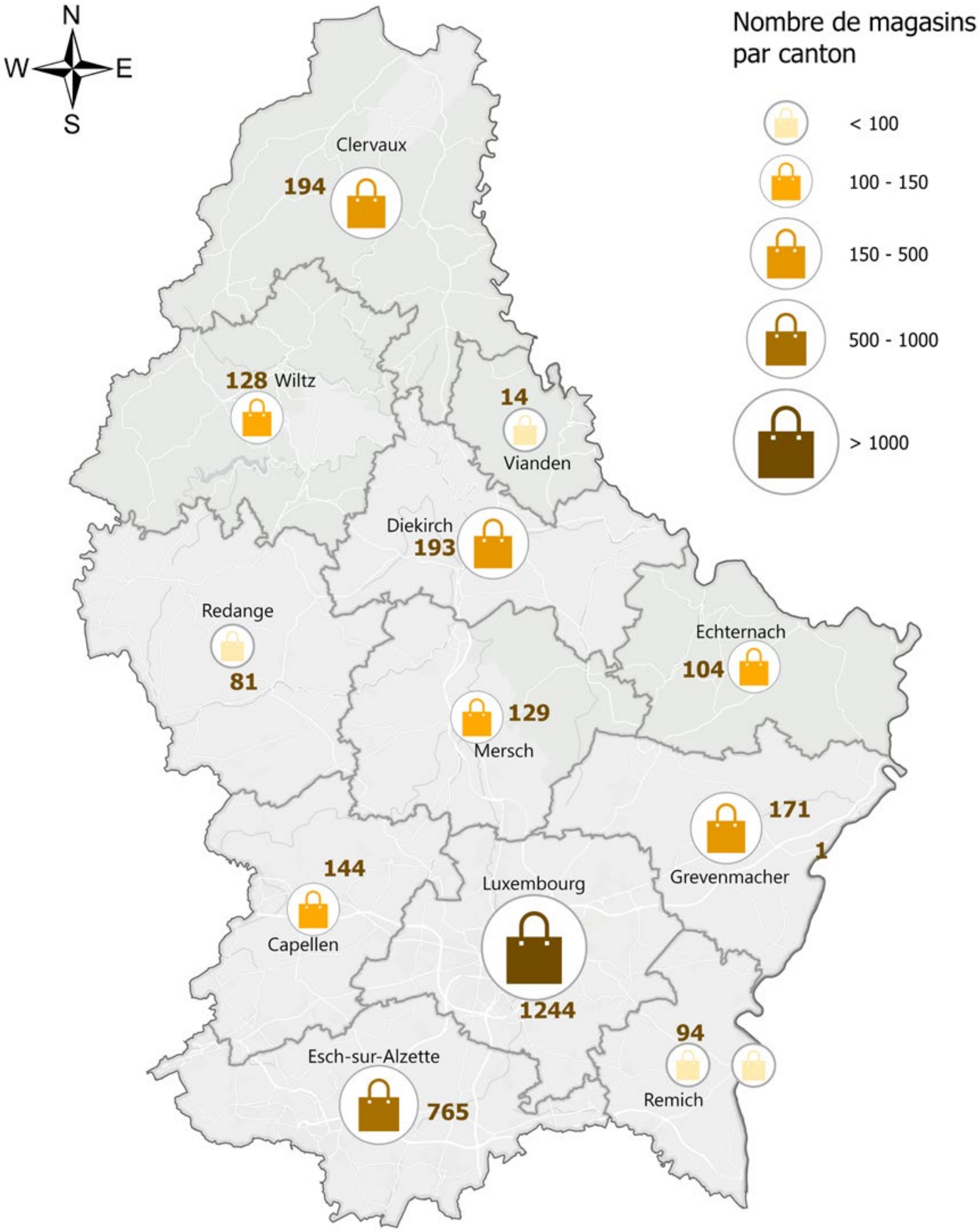
This section analyzes the distribution of commercial Points of Interest (POI) and sales areas by canton using interactive maps. These visualizations help to better understand commercial density and regional disparities, offering an essential overview for evaluating territorial commerce dynamics in Luxembourg.

07.01 | By Canton


Clerf
Wiltz
Vianden
Diekirch
Redingen
Echternach
Mersch
Grevenmacher
Capellen
Luxemburg
Remich
Esch an der Alzette

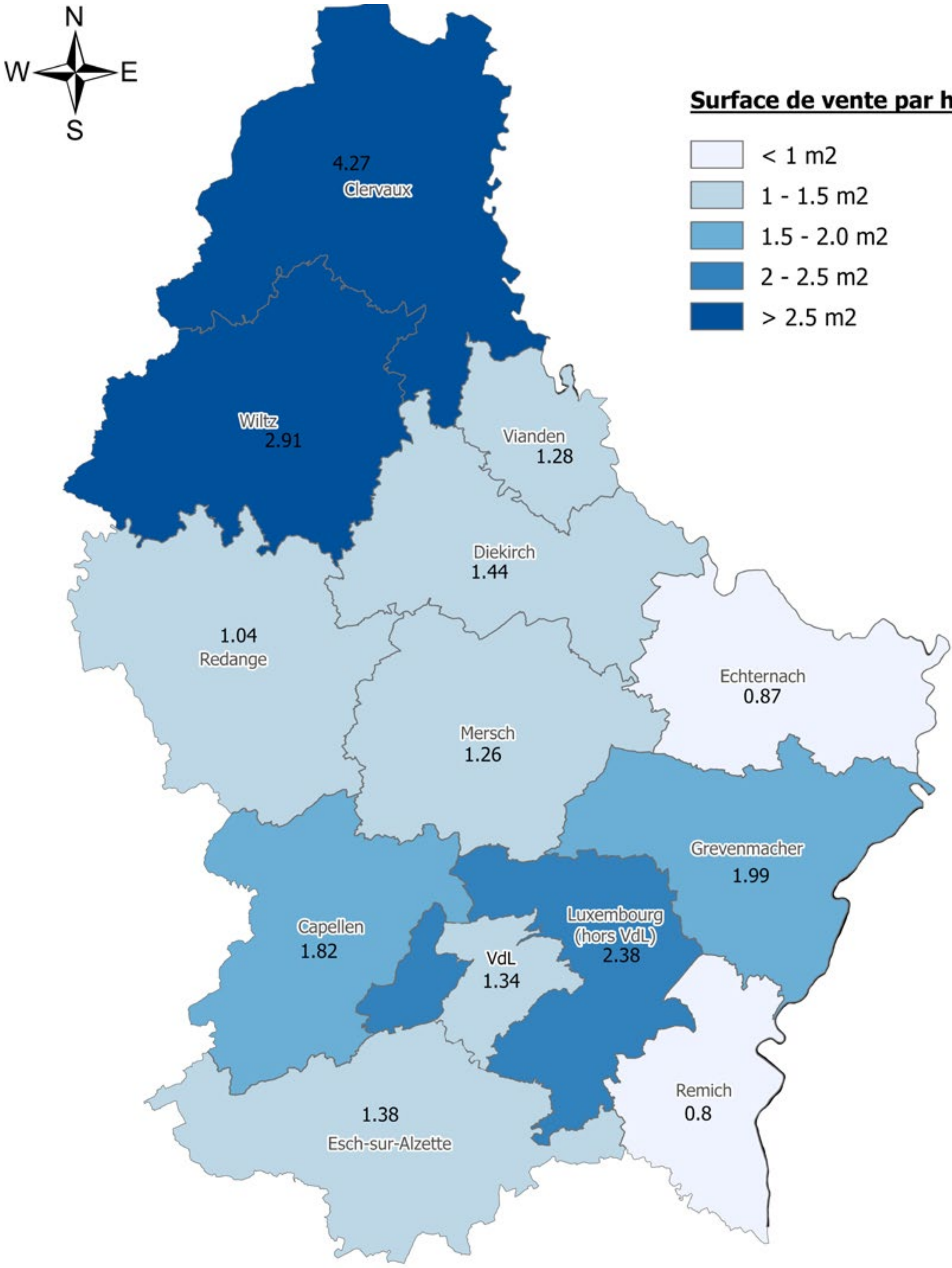
Distribution of retail stores

by canton



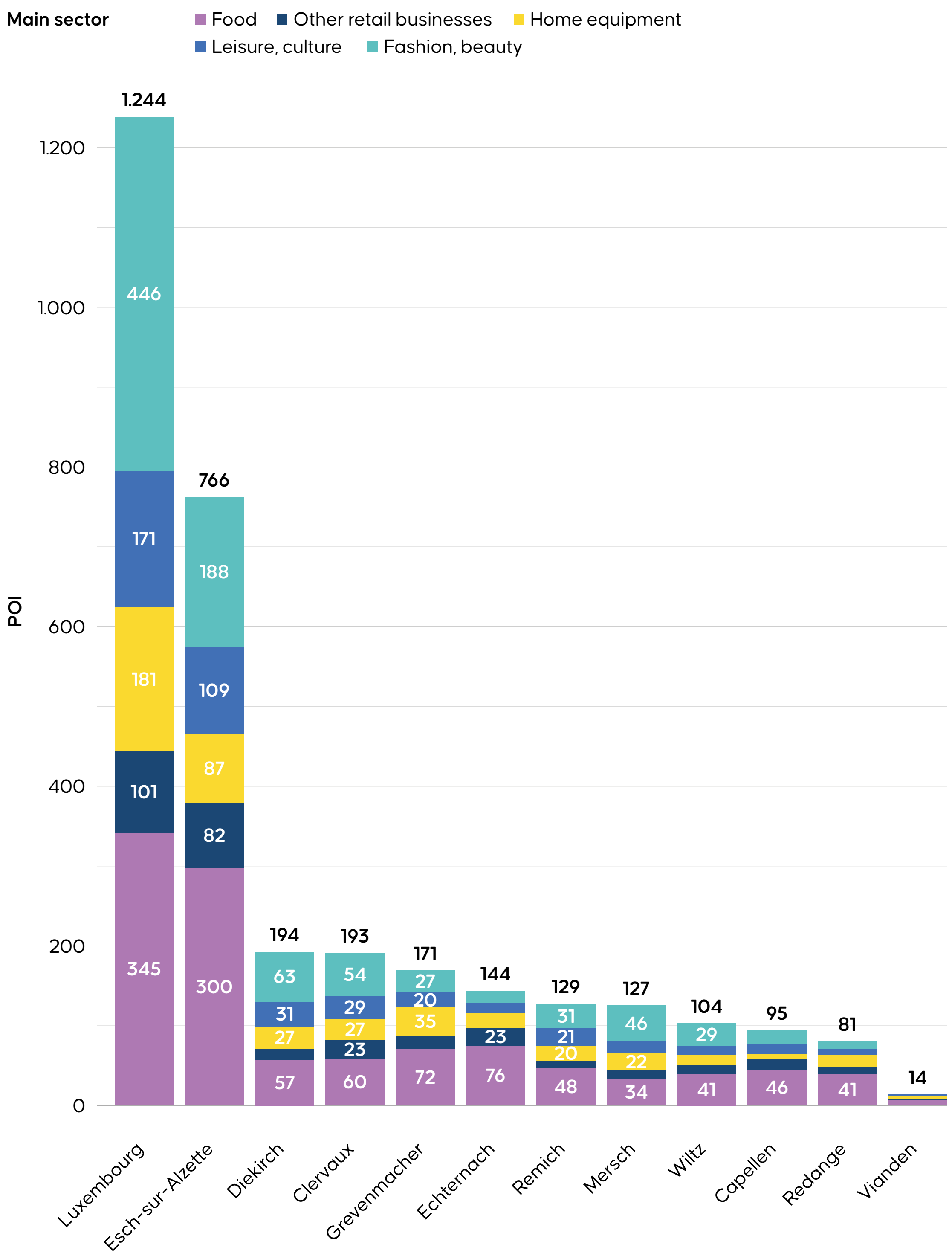
Sales area

per capita and by canton



Distribution of stores

by canton and category



Distribution of sales areas

by canton

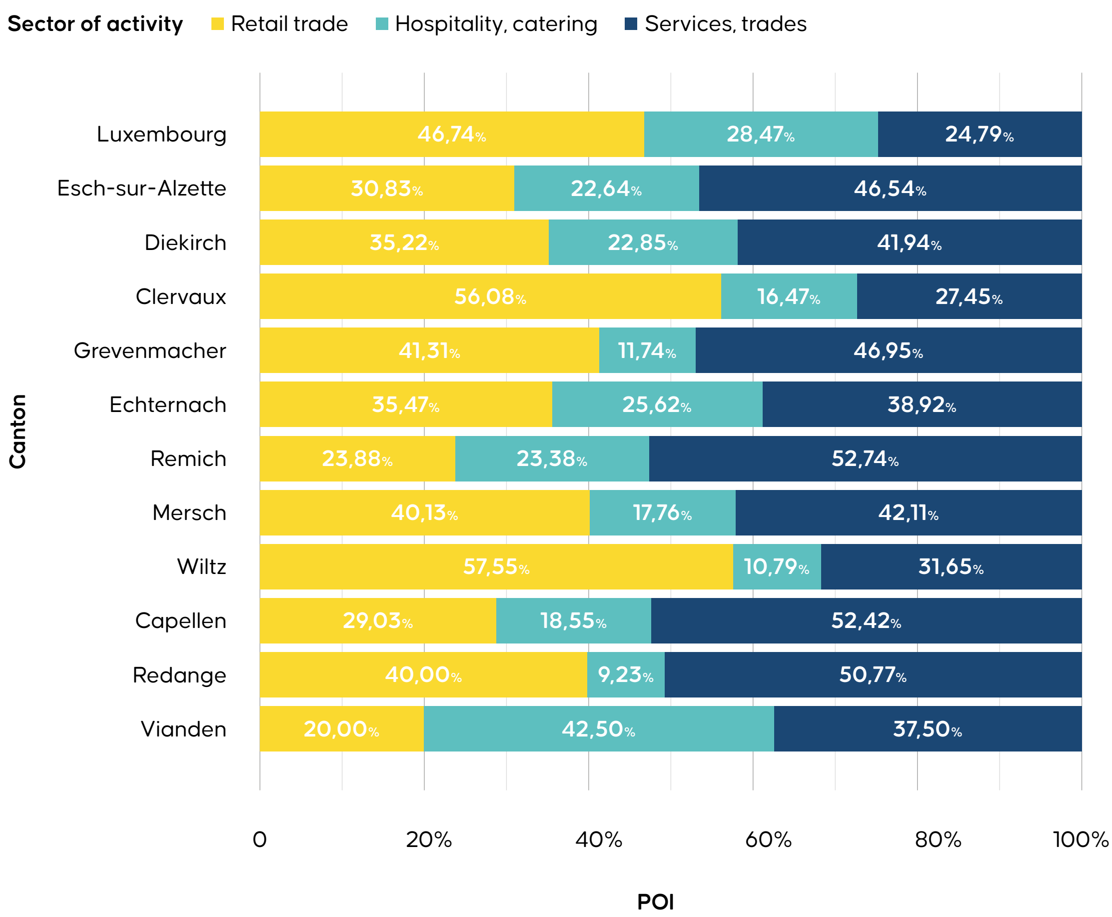
Canton	Food	Other retail businesses	Home equipment	Leisure, culture	Fashion, beauty	SdV of service businesses and Horeca	Total
Luxembourg	11.1866 m²	15.990 m²	83.605 m²	42.085 m²	111.830 m²	4.485 m²	**369.861 m²**
don't: VDL	59.400 m²	5.750 m²	21.370 m²	20.225 m²	68.505 m²	3.165 m²	**178.415 m²**
Esch-sur-Alzette	88.175 m²	11.995 m²	87.215 m²	31.610 m²	43.260 m²	4.570 m²	**266.825 m²**
Capellen	30.971 m²	3.990 m²	58.120 m²	900 m²	4.175 m²	820 m²	**98.976 m²**
Clervaux	23.610 m²	3.620 m²	28.175 m²	7.620 m²	26.725 m²	830 m²	**90.580 m²**
Grevenmacher	21.290 m²	1.940 m²	33.270 m²	3.160 m²	5.130 m²	905 m²	**65.695 m²**
Diekirch	14.364 m²	3.920 m²	17.474 m²	6.420 m²	7.930 m²	1.335 m²	**51.443 m²**
Mersch	13.119 m²	2.010 m²	11.580 m²	9.450 m²	8.935 m²	735 m²	**45.829 m²**
Wiltz	12.295 m²	2.230 m²	24.350 m²	3.690 m²	14.120 m²	310 m²	**56.995 m²**
Redange	11.735 m²	1.920 m²	2.690 m²	545 m²	4.700 m²	310 m²	**21.900 m²**
Remich	11.520 m²	810 m²	4.310 m²	1.180 m²	1.135 m²	575 m²	**19.530 m²**
Echternach	9.435 m²	950 m²	2.685 m²	1.080 m²	3.020 m²	485 m²	**17.655 m²**
Vianden	370 m²	6.530 m²	190 m²	20 m²	-	170 m²	**7.280 m²**
Total	**348.750 m²**	**55.905 m²**	**353.664 m²**	**107.760 m²**	**230.960 m²**	**15.530 m²**	**1.112.569 m²**

Distribution of sales areas

by canton

Canton	Total of SdV	SdV per person	Population
Clervaux	90,580	4.27	21,214 m²
Wiltz	56,995	2.92	19,530 m²
Grevenmacher	65,695	1.99	33,047 m²
Capellen	98,976	1.82	54,352 m²
Luxembourg	369,861	1.78	207,650 m²
don't: VDL	178,415	1.32	134,697 m²
Diekirch	51,443	1.44	35,764 m²
Esch-sur-Alzette	266,825	1.38	192,739 m²
Vianden	7,280	1.28	5,680 m²
Mersch	45,829	1.26	36,262 m²
Redange	21,900	1.04	21,138 m²
Echternach	17,655	0.87	20,283 m²
Remich	19,530	0.80	24,391 m²
Total	**672,050**	**1.66**	**1,112,569 m²**

Distribution of grouped economic sectors
by canton



07.02 | By Location Category

The following chapter provides an overview of business offerings and sales areas according to selected location categories. Special attention is given to the relationship between city centers and peripheral areas. Which locations have the most retail businesses and sales areas? How have the different locations evolved since 2019, and what challenges might they face in terms of commercial sites? What is the situation in specific retail sectors? The following statistics aim to answer these questions.

In general, five location categories are distinguished as relevant for the study's objectives (see Chapter 4). The key criteria for categorization include urban planning considerations ("city centers and neighborhood centers" vs. "scattered and secondary sites"), as well as the differentiation between forms of commercial agglomeration and cooperation ("shopping centers" and "local convenience centers").

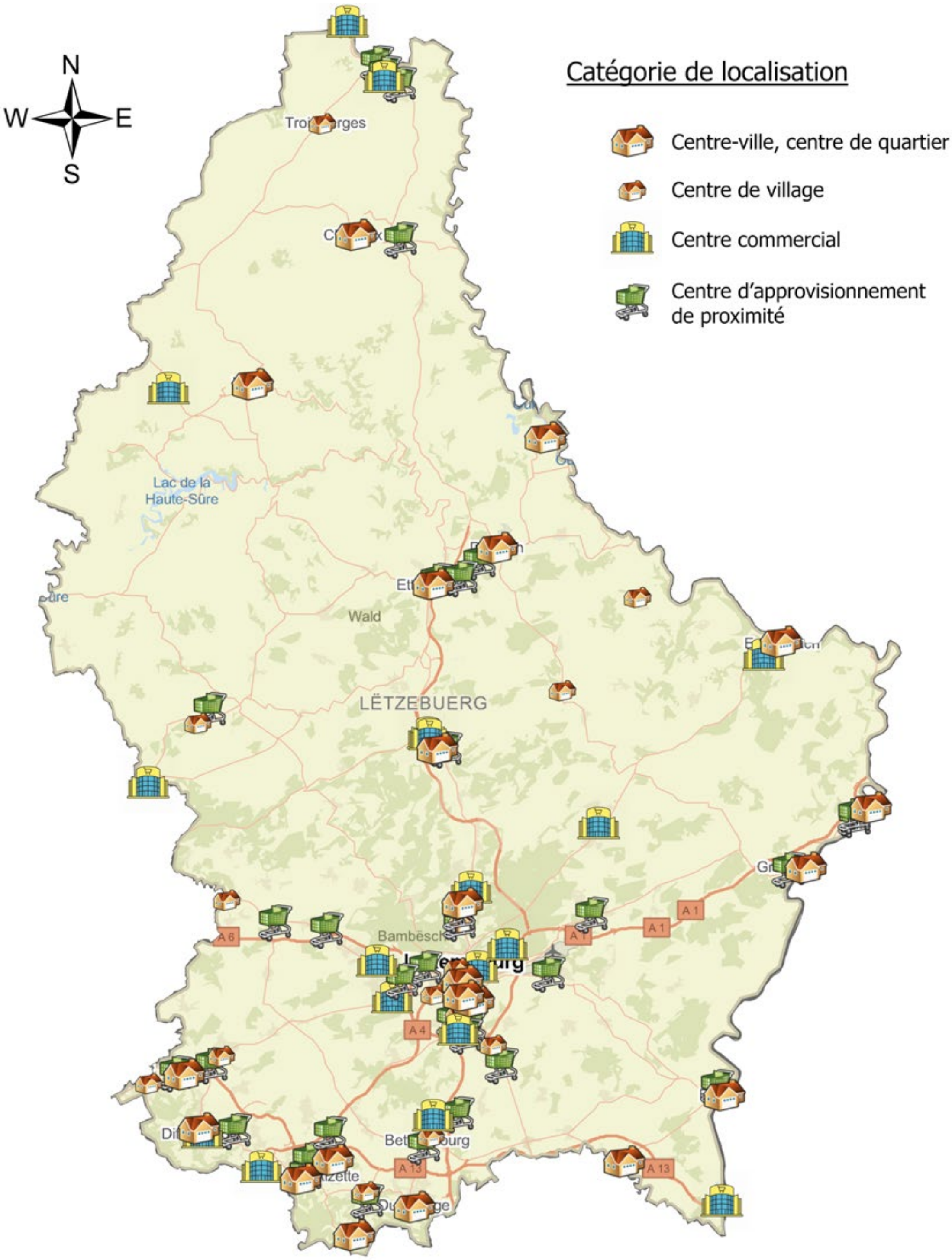
Overview of location categories

	Number of sites
a) City centre, district centre	21
b) Village centre	15
c) Shopping centre	19
d) Local supply centre	34
e) Service station	-
Other peripheral sites*	

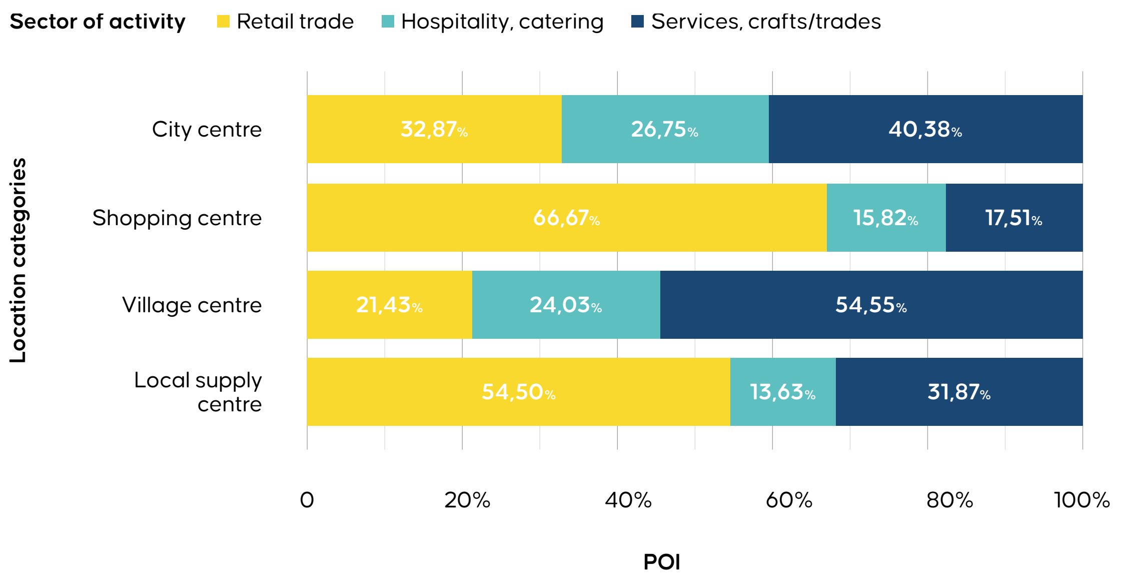
**All other sites that do not fall under categories a) to e).*

Discover the overview of commercial hubs in Luxembourg

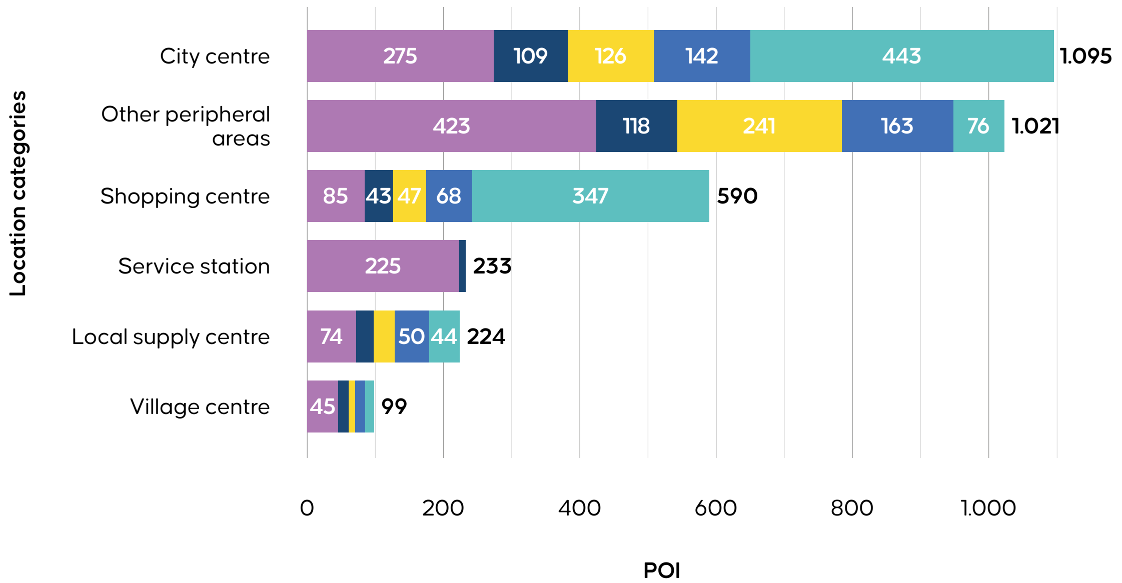
Overview of commercial hubs in Luxembourg



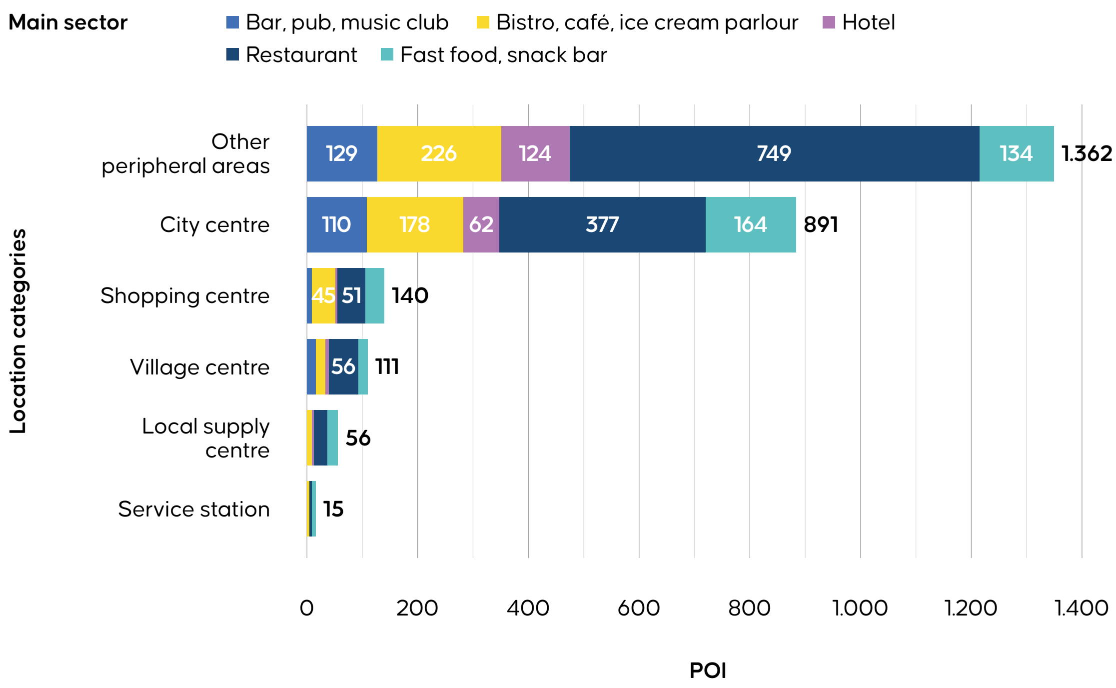
Distribution of economic sectors
by location



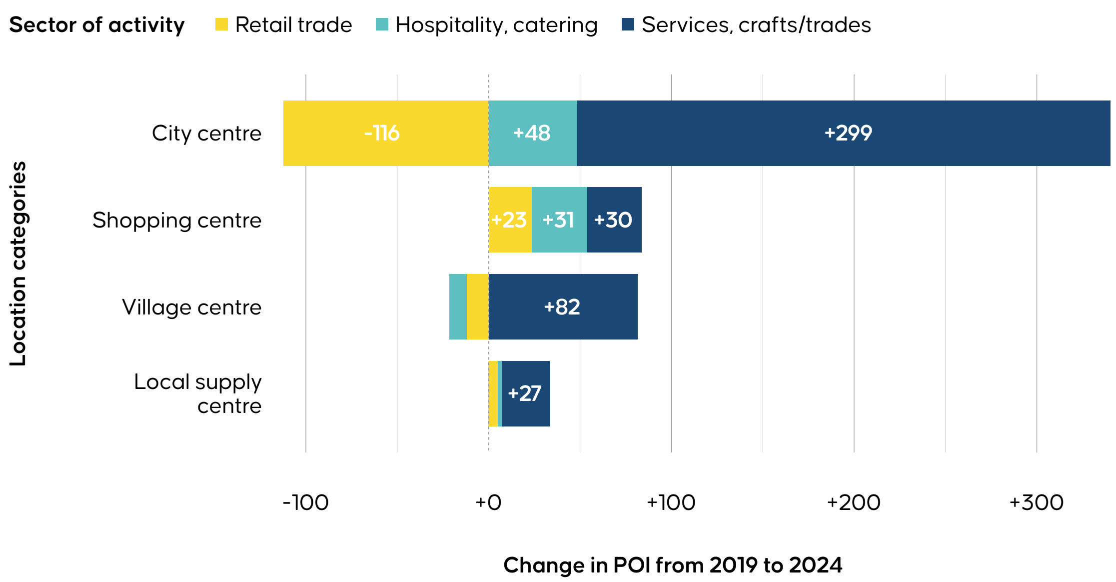
Distribution of retail categories
by location



Distribution of Horeca branches
by location



Development of economic sectors in location categories (2019–2024)



08 | Summary and Observations

Business parks and retail spaces (2019–2024)

- At the end of the third quarter of 2024, the total retail space of all surveyed businesses in the Grand Duchy amounted to nearly 1.1 million m^2. This corresponds to a retail area of 1.66 m^2 per each of the approximately 672,000 inhabitants of the country.
- The figures show that the evolution of sales areas (+5.3%) slightly lags behind the population growth (+7.4%) since Q3 2019. This may be explained, among other factors, by the ongoing growth of online retail, which—due to its lower spatial requirements—puts pressure on existing traditional retail areas. This is particularly true for retail segments that have recorded strong online growth for years, such as the fashion and consumer electronics sectors. This development is reflected in the stagnation or even decline of sales areas in some sectors.
- The evolution of the business base in retail (broadly defined) (+1.1%) and in the Horeca sector (+2.5%) between 2019 and 2024 indicates overall moderate growth, which remains well below population growth (+7.4%). Since the retail space has grown more strongly than the number of stores, this leads to an increase in the average sales area per store.

By economic sector and branch

Although both the business base and retail space have shown overall net growth since 2019, the picture varies greatly across different retail activities:

- Among the "winners" of the sector over the past five years is the food retail segment, which, in net terms, gained more than 100 new outlets (+17.3%) and over 36,000 m^2 of additional sales area (+12.7%). Other segments that have grown both in store numbers and in sales area include sports and hobby stores, DIY stores, and shops selling car and motorcycle equipment.
- Among retail segments that have declined in store numbers since 2019 are, for example, food craftsmanship, the fashion sector, and specialty stores for electrical and consumer electronics devices.

Regarding the "Food" category, which has experienced the strongest growth among the five categories studied (see Chapter 6.1), some interesting trends can also be observed:

- Since the start of data collection in 2019, food retail has grown continuously and has even outpaced demographic growth.
- This growth is evident in nearly all operational formats: supermarkets, hard-discount supermarkets, and small grocery stores have all expanded over the past five years. The hard-discount supermarket group has shown particularly strong growth, with an increase in sales area of more than 35% over five years.
- The country's increasing multiculturalism is also increasingly reflected in the retail landscape: there are now 95 food stores specializing in international products—an increase of 21.8% since 2019.
- Other "winners" within food retail include specialty shops (chocolatiers, cheese shops, etc.) and stores offering international assortments (+21.6% in sales area and, in net terms, 17 new businesses since 2019). Luxembourg's multiculturalization is therefore becoming more and more visible in the commercial landscape.
- Organic stores and farm shops have seen relatively significant growth in number over the past five years (+21.4%), though their share in overall food retail remains modest—currently around 3%.

The Horeca sector, like retail, also shows a differentiated picture in the development of its various activities since 2019:

- While the number of restaurants has increased only moderately (+2.4%), fast food restaurants recorded above-average growth (+23.3%, reaching 376 establishments).
- In contrast, the group of bars, cafés, bistros, and ice cream parlors experienced a notable decline of around 9% in the number of establishments.

By location category

In Q3 2024, the Grand Duchy of Luxembourg had 19 shopping centers with 590 retail stores (18.1% of total), 34 local convenience centers with 224 stores, and 233 gas station shops.

The 21 city and neighborhood centers, classified as such due to their urban character and variety of offerings, accounted for 1,095 retail stores, representing 33.6% of all retail businesses.

Since 2019, however, there has been a slight decline in retail activity in city centers. The data shows a trend of repurposing traditional retail spaces into service and Horeca uses. This shift has led to a relative decline in retail's share (from 37.5% in 2019 to 33.6% at the end of 2024) within the city centers' economic mix. This trend is not specific to Luxembourg but is widely observed across Europe. It also reflects the growing multifunctionality of city centers as spaces for discovery and experience.

Other conclusions on retail structure

Pop-up stores and showrooms are growing significantly: flexible and innovative concepts such as pop-up stores or showrooms—which have been trending in other countries for some time—are also developing in Luxembourg. The number of such usually temporary POIs has grown from 40 in 2019 to 69 today, a 72.5% increase. While pop-up stores are not a cure-all for structural change in city centers, they can nonetheless enhance the attractiveness of commercial sites and contribute dynamic effects.

Multichannel retail is gaining popularity: as noted in the previous Retail Report edition, "multichanneling" is one of the major trends in retail. To reach end customers, more and more stores are using different distribution channels. In 2019, only one in three stores (33.5%) had its own online shop; five years later, that figure had already risen to 44.4%. This trend toward digitalization is evident across all retail sectors studied—with the exception of car and motorcycle accessory stores.

Unused commercial spaces / Potential areas

Over the past five years, the national vacancy rate has remained relatively stable, increasing only slightly from 11.3% to 11.9%. Between 2023 and 2024, the rate even slightly decreased by 0.4 percentage points.

The majority (78%) of vacant commercial premises are spaces typically used for retail and services. The remaining 22% are spaces suited to the Horeca sector.

Regarding developments in different location categories, the picture varies:

In general, unused commercial spaces are more prevalent in city centers than in shopping centers. While the vacancy rate in shopping centers hovered around 7–8% since 2019, the rate in city centers has risen from 12.6% to 14.3% today. This indicates that urban centers, often characterized by complex ownership structures, are harder to manage than shopping centers, which benefit from centralized management. Cities and municipalities would be wise to maintain proactive management of commercial space and to tackle the issue of vacancies with new and innovative concepts.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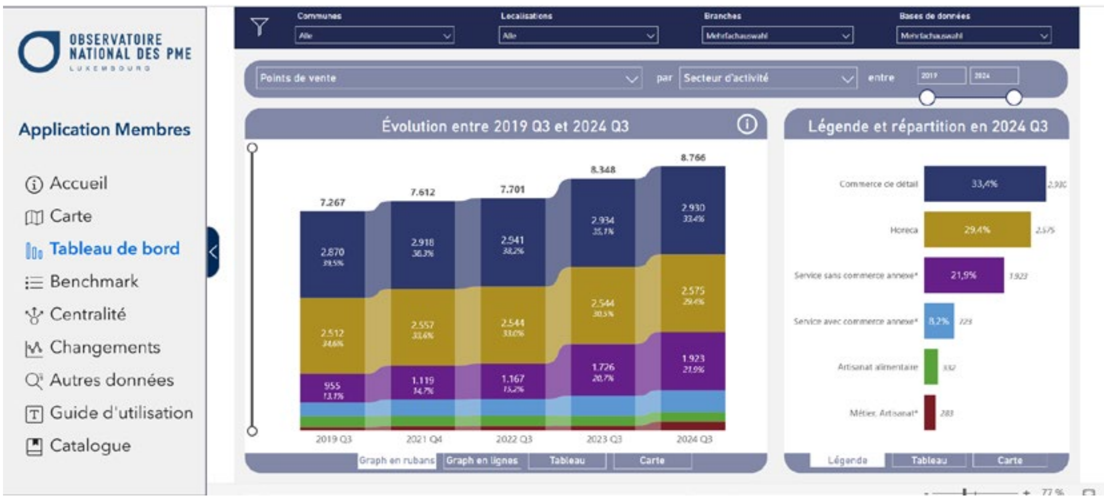
09 | The Trade Register Service "Cadastre de Commerce"

As outlined in Chapter 3, all cities, municipalities, municipal unions, and tourism associations located in the Grand Duchy of Luxembourg have the opportunity to receive access to the "Trade Register" tool. This tool can help them better understand their situation and make informed decisions in the areas of urban development, urban planning, city marketing, or economic promot

Access includes not only raw data on the local commercial environment but also other products and services, such as a dashboard specifically designed for project partners and a customized mapping tool. In addition to the processed trade register data, this mapping tool includes complementary market data, for example, on retail turnover or purchasing power at the municipal level.

Furthermore, project partners can benefit from an additional advisory service, also included in the access package. This offer includes, among other things, a usage tutorial to help users quickly familiarize themselves with the tool and discover its full range of features.

For more information about the Trade Register tool, feel free to contact us via email at the following address: **info@observatoirepme.lu** or call us.



10 | Localyze.lu – the "Site Analysis" Service for Luxembourg Entrepreneurs

Location decisions are gaining in importance, especially at a time when brick-and-mortar retail is under increasing competitive pressure. In addition to the growing competition from online retail, rising rental costs in our country are making it increasingly difficult to find profitable commercial space for physical retail.

To reduce the risks associated with long-term leases, it is essential to make well-informed and forward-looking decisions based on data by thoroughly assessing opportunities and risks. Information about the competition is a key factor among a broader set of criteria. In this context, all interested retailers, restaurateurs, and businesses in Luxembourg have the opportunity to register for the **Localyze.lu** service from the Luxembourg Confederation in order to benefit from a detailed analysis of their location.

Thanks to data from the Trade Register, **Localyze.lu** can provide relevant information on competition in your business sector. You can not only request statistics on national and regional sector developments since 2019, but also access an interactive map to better understand the current competitive environment. In addition, a range of complementary socio-demographic data is available to help assess the potential of new commercial sites.

Localyze.lu is a central pillar of the Pakt Pro Commerce, a political initiative launched in April 2016.

For more information, visit: **www.localyze.lu**

LOCALYZE.LU
BY PAKT PRO COMMERCE

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