

- The rise of the supermarket, on the other hand, appears to have peaked, with, typically, less dramatic growth in their share during the 1990s.

Obviously, this is part due to the rise of the hypermarket and part to their already high share at the turn of the decade. Nevertheless, there remains considerable scope for growth in both forms in some member states - notably Italy.

- The other major selling development has been in the rapid growth of discount stores

(This is a term which evidently intersects the hypermarket/supermarket nomenclature in most data sources.³⁶) As can be seen from Table 6.7, discount stores increased their market share in all member states between 1991 and 1996 - typically by between 5% and 7%, although strangely (in the light of the previous point) by 10% in Italy. This may suggest the emergence of a dual industry in that country, the reasons for which deserve further attention. In the next chapter, we identify the role of specific firms (for example, Aldi and Lidl) in this development.

Table 6.7: Growth in numbers of discount stores

	1996		1991		growth in share (% points)
	% of national turnover	no. of stores	% of national turnover	no. of stores	
Austria	17	568	14	530	3
Belgium/Luxembourg	25	762	18	587	7
Denmark	20	739	15	544	5
Finland	12	820	10	760	2
France	7	1940	1	436	6
Germany	30	12130	24	8290	6
Greece	n.a.	n.a.	n.a.	n.a.	n.a.
Ireland	n.a.	n.a.	n.a.	n.a.	n.a.
Italy	10	2360	..	60	10
Netherlands	13	607	10	482	3
Portugal	9	314	2	30	7
Spain	9	2315	5	1180	4
Sweden	11	305	6	166	5
UK	11	1440	6	1129	5

Source: The Retail Pocket Book 1998, ACNielson

In general terms, franchising is an organisational structure which can be used to gain a leading market position without necessarily incurring the same magnitude of sunk costs as would full-fledged ownership.

At this stage in our research, we have little to add on this issue beyond the data reproduced in Table 6.8

36. There appears to be no formal definition of what constitutes a distant store. Nevertheless, different sources