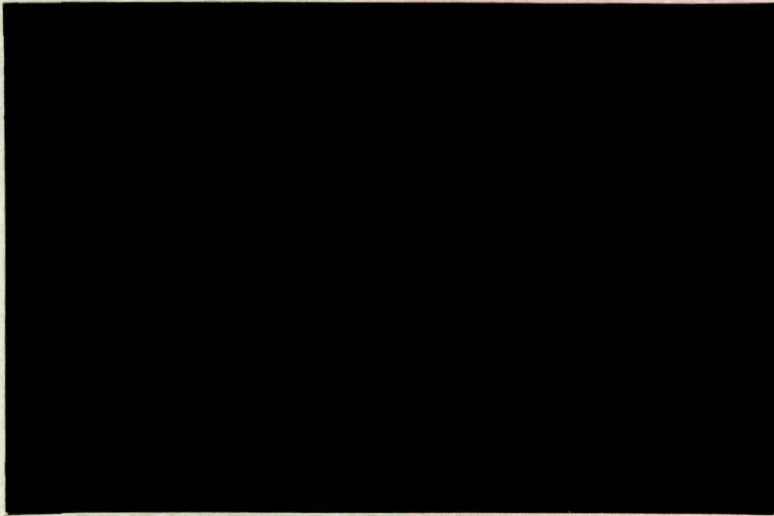


**somo**  
Keizersgracht 132  
1015 CW Amsterdam

8949



*Stichting Onderzoek Multinationale Ondernemingen*  
*Centre for Research on Multinational Corporations*

**somo**

ALDI

A company profile

on the

'King of Discount'

Report for FIET in Geneva

Marijke Smit

February 1993

**SOMO**

Keizersgracht 132  
1015 CW Amsterdam

**SOMO (Centre for Research on Multinational Companies)**

Keizersgracht 132

1015 CW Amsterdam

The Netherlands

telephone: (0)20 - 6391291

fax: (0)20 - 6391321

**SOMO**Keizersgracht 132  
1015 CW AmsterdamContent

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## Introduction

FIET decided to focus on the secretive German food discounter ALDI. On December 10 and 11, 1992 EURO-FIET organised a seminar with trade unionists from Germany, Belgium and Denmark on ALDI North in Brussels. For 1993 a follow-up meeting is planned.

FIET requested SOMO, the Dutch Centre for Research on Multinational Corporations, to write a company profile on ALDI. SOMO gathered the information on ALDI by using its own documentation centre, databanks, other specialised libraries and by asking information from trade unions. The Austrian GPW and the Dutch Dienstenbond FNV have send reply letters, which contained interesting information.

SOMO hopes that this report will be useful to both EURO-FIET and national trade unionists in their dealings with ALDI management.

The content of this report is as follows. First a short general overview of ALDI, including a very brief historical outline. In the second paragraph the situation per country is described (the length of these country profiles differs, depending on the available information). In the next paragraph the complicated company structure is explained. In paragraph 4 the financial situation is described. In the 5th paragraph both the strategic policy of ALDI and that of trade unions confronting ALDI is described.

In this report the German names of the companies are used: ALDI Nord (North) and ALDI Süd (South). All currencies are (also given) in Deutsche Mark (DM).

### 1. General Overview

In 1946 Karl and Theodor Albrecht took over the small shop (100 square meters) from their mother Anna in Schonnebeck, a suburb of Essen.<sup>1</sup> In 1953 the 31 shops of the Albrecht brothers realised a turnover of DM 6 million. In 1958 they opened their first no-frills grocery shop under the name ALDI, short for Albrecht Discountgesellschaft (discount store).<sup>2</sup> In 1960 the 300 ALDI shops realised a turnover of DM 900 million. In 1961 the two brothers divided the company among themselves. Theodor Albrecht owns ALDI Nord and Karl Albrecht owns ALDI Süd. The borderline between the companies strangely divides Germany: from the Dutch border at Bocholt between Essen and Mülheim through the Ruhr-area to Hessen.

In the 1970s and 1980s ALDI started its expansion across the borders of Germany.

ALDI Nord and ALDI Süd not only employ activities in different countries, but also have a different logo and sell other goods. ALDI Nord sells a wider range of articles (600 to ALDI Süd's 450) including deep frozen goods and cigarettes. ALDI Nord's shops have an average size of 400 square meters in the Federal Republic of Germany, while 60 % of ALDI Süd's shops are larger than 600 square meters. Buying and selling prices are, however, the same at ALDI Nord and ALDI Süd.

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<sup>1</sup>. Industriemagazin, March 1989.

<sup>2</sup>. Business Magazine, 1/6/1990.

Nowadays ALDI is a chain of food discount supermarkets that owns over 3,500 stores in eight countries: Federal Republic of Germany, the Netherlands, Belgium, Austria, Denmark, United Kingdom, France and the United States.<sup>3</sup> Aldi Nord covers the north of Germany, former East-Germany, the Netherlands, Belgium, Denmark and France. Aldi Süd covers the south of Germany, Austria, the UK and the USA. Additionally ALDI might have some interests in Luxembourg, Italy and Spain. ALDI has been listed as the number 9 on the list of the world's biggest food retailing companies in 1991.<sup>4</sup> The Albrecht family is still the owner (and manager) of the discount chain and besides has interests outside the retailing trade.

ALDI has estimated sales of DM 27.4 billion in 1991. The net margins are estimated at 1-2 %. The share of food products in total turnover is 90 %.

The average store size is 9,000 square feet. The number of product lines in most countries is 600-650. In the stores the goods are displayed in their cardboard delivery boxes, which often have to be opened by the customers, put on basic shelving. ALDI's stores have been described as "Spartan" and ALDI's formula as "Pile 'em high, sell it cheap". The stores in Europe are usually located in densely populated areas.

Karl Albrecht's maxim is: "Poor people have to save money, rich people like to". In order to be able to sell articles at discount rates ALDI cuts costs everywhere. Only the absolute minimum of personnel is employed, which causes problems regarding the workload.

ALDI's formula is based on selling its products cheap and therefore ALDI wants to buy them cheap, too. ALDI succeeds in that objective by using its formidable purchasing power. It is said that ALDI's conditions are very strict. Still ALDI seems to have established good, steady relations with many suppliers. Mike Dawson from Lebensmittel Zeitung says about ALDI: "Customers love them because the goods are so cheap and suppliers love them because ALDI's buyers stick to their word. If a relatively minor supplier gets an agreement from ALDI's buyers, he knows he has a long-term commitment. Other big chains sometimes just toy with small suppliers."<sup>5</sup> Some suppliers make the mistake of becoming dependant on ALDI.

ALDI is a secretive group that has a worldwide policy of not talking to the press. The Albrecht brothers are shy to the point of obsession, especially since Theodor was kidnapped and held for a DM 7 million ransom in 1971. It is said that German retailers are characteristically reticent, but that ALDI leads the field in corporate silence.<sup>6</sup> The policy of non-co-operation with the media applies as much to top executives as to check-out staff.

ALDI's juridical structure enables the company to keep financial information to itself. ALDI does not

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<sup>3</sup>. Supermarket News, 1/6/1992.

<sup>4</sup>. The companies are: Tengelmann (1, FRG), American Stores (2, USA), Kroger (3, USA), Rewe (4, FRG), Carrefour (5, F), Ito-Yokado (6, J), Safeway (7, USA), Sainsbury (8, UK), ALDI (9, FRG), Auchan (10, F). Supermarket News, 30/11/1991.

<sup>5</sup>. Business Magazine, 1/6/1990.

<sup>6</sup>. Business Magazine, 1/6/1990.

want to be seen as a multinational corporation. ALDI maintains that the ALDI management in each country is independent.

Forbes lists the two brothers Albrecht in The World's 291 Billionaires in 1992; Forbes estimates their joint fortune at US \$ 5.1 billion (DM 10.4 billion).

## 2. Situation per Country

Table 1. ALDI: estimated number of shops and number of employees worldwide<sup>7</sup>

	<u>Shops</u>	<u>Employees</u>
Germany	2,400	20,000
Netherlands	268	3,020
Belgium	263	2,500
Austria	193	2,300
Denmark	157	1,000
United Kingdom	47	n.a.
France	37	n.a.
USA	<u>350</u>	<u>n.a.</u>
Total	3,715	28,820+



Based on a lot of estimations the above table with the number of shops and the number of employees of ALDI has been compiled. As the number of employees is not known for three countries the total of 28,820 persons is given a +, meaning that the number of employees of these three countries should be added.

### 2.1. Federal Republic of Germany

Most of the ALDI stores are to be found in its home country, Germany. ALDI employs 20,000 people in the country. About 75 % of the employees are women.

ALDI's turnover in Germany was estimated at around DM 18 billion in 1989.<sup>8</sup>

In German food retailing ALDI is the number 3, after Metro Group and Rewe AG. In the discount sector ALDI is the undisputed number 1. The number 2 discounter is Plus, owned by Tengelmann. In 1991 the discounters (ALDI, Plus, Penny, Lidl, Norma) have a joint market share of 23 % in (the old

<sup>7</sup>. The most recent known data has been used, varying from 1990 to 1993.

<sup>8</sup>. European Retail Magazine as cited by Food Magazine.

territory of) Germany.<sup>9</sup> ALDI was the first discounter and therefore its 'new' competitors are often referred to as "Aldi-Nativen".

In 1991 it was estimated that 73 % of German households shop at ALDI's 2,100 stores. The market share in Germany is 12 %. In 1992 ALDI owns 2,400 stores and has a market share of 13 %.

The circulation speed of the ALDI articles is the highest in German retail. It takes 8 days on average to sell the articles from a store. It is said that the articles are sold 11-30 days before the suppliers are payed.

ALDI sells own-labels, but also well-known brands -often in larger packages than its competitors. The special offers of non-food products are famous in Germany. ALDI has sold, for instance, 100.000 Commodore Personal Computers. From January till April 1990 both ALDI Nord and Süd sold over 100 different special offer products in the non-food sector. The largest categories were garments (23) and household articles and ironmongery (18).<sup>10</sup>

There are both shops belonging to ALDI Nord as to ALDI Süd in Germany. There are some 20 ALDI Nord companies each of which is responsible for between 50 and 90 shops. There are also about 20 ALDI Süd companies.

ALDI is well-known for its neighbourhood shops, but from 1986 onwards ALDI experimented with shops in free standing buildings, a larger assortment, enough parking space, etc. ALDI sometimes rents part of its store space to others, like Hermes Fleisch and Diechmann and Hermes shoe discount.

The new stores in the former German Democratic Republic are very popular. In 1991 M+M Eurodata, a German research institute, expected 500 ALDI shops to be established in the former GDR in the medium term. Discounters are expected to gain a total market share of 20 %.

ALDI has very low personnel costs, about 3-5 % of sales. This is less than half of the personnel costs of its competitors. ALDI pays its employees better than its competitors, but employs less people per shop and expects working overtime and over 100 % dedication.

## 2.2. The Netherlands

ALDI started its activities in the Netherlands in March 1975 by buying the supermarket chain Combi. To begin with these stores ALDI established a national chain, which is especially strong with new units in new population centres or new shopping centres in the somewhat bigger cities.

ALDI has no real headquarters in the Netherlands. There is, however, a service department, called ALDI Inkoop (Buying), in Culemborg. Furthermore, ALDI operates in this country via five trading companies. These trading companies own the 268 stores (July 1991): Albrecht Culemborg BV (52 stores), Albrecht Ommen BV (56 stores), Aldi Best BV (77 stores), Aldi Drachten BV (37 stores) and Aldi Zaandam BV (45 stores). The distribution centres are located in the above mentioned 5 towns.

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<sup>9</sup>. County Netwest Securities in Das Sonderangebot, December 1991.

<sup>10</sup>. M+M Eurodata as cited by Lebensmittel Praxis, 4/10/1991.

In Zaandam there are, for instance, 16 trucks with 20 drivers that deliver the goods to the 45 shops.<sup>11</sup>

The parent company of both Aldi Inkoop BV and Aldi Zaandam BV is Albrecht Culemborg BV. The parent company of both Albrecht Culemborg BV and Albrecht Ommen BV is Albrecht Aldimarkt GmbH in Essen, Germany. The parent company of Aldi Best is ALOG-Onroerend goed- en handelsmaatschappij BV, Culemborg. For Aldi Drachten BV no parent company is mentioned.

These six ALDI companies in the Netherlands employ 3.020 people at the end of 1990: Aldi Inkoop BV (20), Albrecht Culemborg BV (700), Albrecht Ommen BV (750), Aldi Best BV (550), Aldi Drachten BV (600) and Aldi Zaandam (400).<sup>12</sup> In Zaandam this number has risen to 432 in 1993.<sup>13</sup>

The average store size is 500 square meters. The average number of articles per store is 700. 200-300 articles are own-labels. ALDI stores are simple, with the box-presentation of articles.

ALDI in the Netherlands becomes, according to Food Trends, more and more a quality discounter. ALDI carries (fancy) labels with a product quality which is sometimes higher as that of the well-known labels. Besides, ALDI has remarkable 'in-out' campaigns (often with luxurious non-food products which are not normally carried), which means that articles are sold for extremely low prices.

ALDI is probably the cheapest supermarket chain in the Netherlands.

Estimates of ALDI's retail sales in the Netherlands differ a lot. A Dutch financial newspaper estimated those sales at only Dfl. 260 million (DM 293 million) in 1989, but a Dutch food magazine estimated those sales for only one year later at Dfl. 1.900 million (DM 2.1. billion).<sup>14</sup> Another source mentions detailed results per trading company (see table 2). Total turnover is estimated at Dfl. 1.4 billion (DM 1.6 billion) and profits at Dfl. 29 million (DM 33 million).

It is estimated (by Food Trends) that 77 % of the average ALDI supermarket sales are dry groceries. Most of the food products have been produced in the Netherlands, while most of the non-food items, like detergents, are imported from Germany.

ALDI's market share in the Netherlands is increasing. The market share developed from 4,8 % (1986, 1987) to 7 % in 1991.<sup>15</sup> ALDI's customers are people with a low income who buy everything in that store and people with a high income who only buy some bulk products at ALDI and the rest at Albert Heijn (market share of over 26 %).

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<sup>11</sup>. Letter of Jacqueline Bergervoet, Dienstenbond FNV, 27/1/1993.

<sup>12</sup>. D&B 25.000. The Principal Companies in The Netherlands 1993.

<sup>13</sup>. Excluding people who have been employed for a shorter period than a half year. Letter from Jacqueline Bergervoet, Dienstenbond FNV, 27/1/1993.

<sup>14</sup>. Het Financieele Dagblad, 12/2/1992; Food Trends, 1991.

<sup>15</sup>. AGB/Attwood in Food Trends 1991; Het Financieele Dagblad, 31/10/1992.



Table 2. ALDI: sales and profit in the Netherlands, 1990 (in Dutch guilders)<sup>16</sup>

	<u>sales</u>	<u>profit</u>
Aldi Best BV	374,710.938	6,907.971
Albrecht Ommen BV	338,577.145	9,296.439
Albrecht Culemborg BV	277,651.939	4,751.648
Aldi Drachten BV	223,574.251	5,728.632
Aldi Zaandam BV	<u>213,817.731</u>	<u>2,331.388</u>
<b>Total</b>	1,428.322.004	29,016.078

The new Dutch legislation obliging bourse-listed companies to disclose information if shareholders' stakes rise to a level of 5 % led to the discovery of an interest of 5.58 % of ALDI in the Dutch supermarket chain De Boer Winkelbedrijven NV in Beilen. The De Boer management had not been informed when the interest was bought, but didn't react alarmed as there is still a bigger shareholder (Nationale Nederlanden insurance company with 10 %). ALDI holds this interest through its holding company Holta BV in Culemborg. The interest has been built up recently. An ALDI spokeswoman said the interest should be seen as a normal investment. In 1991 De Boer booked sales of Dfl. 1.3 billion (DM 1.5 billion).

### 2.3. Belgium

ALDI started its activities in Belgium at the end of 1976. Nowadays ALDI owns 263 stores in Belgium in 1992.<sup>17</sup> The stores sell around 600 articles on sales surfaces of 500 - 700 square meters. ALDI employs some 2,500 women and men.

The ALDI companies in Belgium are owned by Hutha GmbH and WEBA GmbH in Germany. There is also an ALDI Coordination Centre in Belgium.<sup>18</sup> The four trading companies, covering the stores, are mentioned in table 3. Total turnover is BF 37,760 million (DM 2.3 billion) in 1991.

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<sup>16</sup>. D&B 25.000 The Principal Companies in The Netherlands 1993.

<sup>17</sup>. Nouvelle Gazette, 26/11/1992.

<sup>18</sup>. Belgium has since 1982 a Coordination Centre Statute that offers very generous tax exemptions to companies establishing a Coordination Centre in the country. In 1990 already 225 multinational companies established such a centre. The Coordination Centres have to service the Group companies.

Table 3. ALDI: sales in Belgium, 1991 (in million BF)

	<u>sales</u>
ALDI Rijkevorsel NV	11,850
Aldi Erpe-Mere NV	9,267
ALDI Gembloux NV	8,922
ALDI Roeselare NV	<u>6,240</u>
<b>Total</b>	<b>37,760</b>



ALDI starts a new company when there are more than 60 to 70 shops controlled by an existing ALDI company.

In 1991 largest sales were recorded by GB.INNO.BM -often called the GIB Group-with BF 131 billion (DM 8 billion). At some distance the GIB Group is followed by Delhaize (DM 4.9 billion), Makro (DM 2.5 billion) and ALDI (DM 2.3 billion).

ALDI is among the fastest growers. Its gross and net margins are far higher than those of the other above mentioned retailers. ALDI's personnel costs are far out the lowest in the sector.

Between 1985 and 1989 the number of ALDI shops in Belgium rose by 30 %, sales went up by 50 %.<sup>19</sup> When ALDI still owned 250 shops in Belgium (1989) its market share was 8 %.<sup>20</sup> Discounters (ALDI, Colruyt, Dial) have a joint market share of 20 % in Belgium in 1991.<sup>21</sup>

#### 2.4. Austria<sup>22</sup>

ALDI's first retail activity outside its home country was in Austria. ALDI started its activities in this country in 1968 by buying and restructuring a chain of 50 shops under the name Hofer KG in Sattledt.<sup>23</sup> In 1980 Hofer already owned about 110 branches and now -in 1993- 193.

<sup>19</sup>. Lebensmittel Preaxis, 4/10/1991.

<sup>20</sup>. European Retail Magazine as cited by Food Trends'91.

<sup>21</sup>. County Netwest Securities in Das Sonderangebot, December 1991.

<sup>22</sup>. Most information in this paragraph has been provided by the Gewerkschaft der Privatangestellten GPA in a extensive reply letter to SOMO dated 19/1/1993.

<sup>23</sup>. There is one company under the name Albrecht GmbH & Co. KG in Seefeld. Its activities are: 4 stores, hotel with 160-180 beds, trade in food products, sport products, textiles. According to different sources this company employs 120 to 175 people. It is not clear if and how this company fits

All the stores carry the ALDI Süd logo and a Hofer symbol (strike).

Hofer KG in Sattledt is the parent company of five subsidiaries:

1. Hofer KG Zweigniederlassung Sattledt KG
2. Hofer KG Zweigniederlassung Rietz KG
3. Hofe KG Zweigniederlassung Stockerau KG
4. Hofer KG Zweigniederlassung Trumau KG
5. Hofer KG Zweigniederlassung Hausmannstätten KG.

In these 5 towns the distribution centres are located. All the trucks are owned by Hofer. All the suppliers deliver their goods at the distribution centres.

In 1989 Hofer's turnover in Austria was estimated at DM 1.8 billion.<sup>24</sup>

With sales of öS 10.000 million (DM 1.8 billion) Hofer KG ranked 5th in 1990.<sup>25</sup> The number one, Konsum Österreich, sold for öS 34.200 million (DM 6.2 billion) in 1990. The numbers two to four are Billa, Spar and Metro.

In January 1993 Hofer's sales are estimated by experts at öS 15 billion (DM 2.7 billion).

Hofer employs 1,350 employees in 1990, far less than the 5,698 employees of Julius Meinl, the number 6th with sales of öS 9,723 million (DM 1.8 billion).

On January 1, 1993 Hofer employs 2,300 people. 80 % of the employees are women. 75 % of the employees work part-time. In the supermarkets the percentage of women and of part-timers is even higher.

The arrival of the deep price discounter marked the start of a new era in Austrian food retailing. Other food retailers tried to copy ALDI's formula, but they were not so succesful. Other discounters are Mondo, Zielpunkt, Ledi and Familia.

## 2.5. Denmark

ALDI opened its first shop in Denmark in 1977. In 1991 ALDI owns 157 stores with an actual turnover of some DKr. 3 billion (DM 988 million). ALDI operates in Denmark as two companies, employing a total of 1,000 employees.

ALDI Holding in Karlslunde, an ALDI division, recorded a loss of DKr. 20 million (DM 6.6 million) in 1991 versus a loss of Dkr. 4 million (DM 1.3 million) in 1990. Net turnover was DKr. 851 million

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in the Hofer structure. K Copress Austria 1992; Hoppenstedt - Grossunternehmen in Österreich. Österreich 2000, 1992; Der Handels Compass Österreich 1991/92, August 1991.

<sup>24</sup>. European Retail Magazine as cited by Food Magazine'91.

<sup>25</sup>. Goldener Trend'91.

(DM 280 million) for 1991, somewhat more than in 1990.

Aldi Marked KS in Karlslunde employs 420 people.<sup>26</sup>

ALDI flourished during the Danish recession. Other retailers, like the Danish Co-op and Dansk Supermarked, introduced discount stores of their own in 1978: respectively Bonus and Fakta on the one hand and Netto on the other.

ALDI had to bear the cost of 12 loss-making years before finally making profit in 1988, reverting to losses again in 1990. ALDI has made losses worth a total of DM 30 million and booked a profit of DM 1.8 million in 1988. ALDI sees better times ahead.<sup>27</sup>

ALDI faces stiff competition from Netto, the number one discounter, in Denmark. The Danish market has traditionally been difficult for foreign retailers. ALDI and Edeka Denmark (50 % owned by German wholesaler Edeka Zentrale; 520 outlets) are expanding heavily. They have increased their market share to 9.7 % in 1992. Together they control more than 15 % of all grocery stores in Denmark. FDB remains Denmark's largest retailer.

Discounters like ALDI, Netto and Fakta have a joint market share of 14 % in Denmark in 1991.<sup>28</sup>

## 2.6. United Kingdom

ALDI started its activities in the United Kingdom in April 1990. ALDI announced to set up a 200-strong network of discount supermarkets by 1993. In 1992 a number of an eventual 300 stores was mentioned by ALDI. The pace of new openings seems somewhat disappointing, probably due to difficulties in securing sites and getting planning permissions. In October 1991 ALDI opened its 30th store, in September 1992 its 47th store.

Analysts estimated in 1991 that ALDI could grow to sales of Pounds 560 million (DM 2.1 billion) in the United Kingdom in four years' time; this would represent a market share of almost 2 %.<sup>29</sup> In 1992 ALDI says it aims at a market share of 2.5 %.

Most of the stores are located in the West-Midlands and the North-West. The ALDI stores are extremely basic: boxes and cartons are stacked on the floor. ALDI has a small range of 600 to 650 articles. ALDI does not offer the full range of food and household products, let alone the extras offered by the major supermarket chains, such as bakery, delicatessen, flowers, magazines, pharmacy and petrol. ALDI predominantly sells unbranded lines of basic commodities at low prices instead of known brands. Some analysts indicate that ALDI's unknown brands policy might pose problems in the UK.

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<sup>26</sup>. Kompass Danmark 1992/93.

<sup>27</sup>. European Retail, 26/5/1992 and 27/10/1992; Lebensmittel Praxis, 4/10/1991.

<sup>28</sup>. County Netwest Securities in Das Sonderangebot, December 1991.

<sup>29</sup>. Corporate Intelligence Research cited by The Sunday Times, 3/2/1991.

ALDI's prices can be around 20 % below those of other supermarkets. A survey showed that over 90 % of the ALDI shoppers are attracted by the prices and that the average age of these shoppers in the UK is 45.6 years old.<sup>30</sup>

The British food market is worth about Pounds 35 billion (DM 130 billion) in 1991 and is fairly static. The big multiples also sell flowers, newspapers, pharmacies etc. worth Pounds 20-25 billion, and this market is still growing. The top five control about 75 % of the market. The British market is seen as highly attractive as margins are much higher than on the Continent: Sainsbury, Tesco and Argyl are used to margins of 7 %, compared to 3 % of supermarket chains on the Continent and 1-2 % of discounters on the Continent.<sup>31</sup>

There have always been dicounters in British food retail, for instance UK based Kwik Save (700 shops), that dominates the discount market. The cut-throated competition and no-frills approach brought forward by foreign discounters like ALDI of Germany, Netto of Denmark and Prix Unique of France, however, is a recent phenomenon in the UK. It led to massive discounting, pressure on margins and Sunday opening.<sup>32</sup> Tesco accelerated its costly store expansion programmes in which it tries to cover the country in massive one-stop superstores because of the competition of the foreign discounters.<sup>33</sup> Analysts say that if ALDI would spark a price war, Sainsbury and Tesco would be ruined as the companies they are today, because their entire strategies -costly new superstores and heavy spending- are built on the basis of no price war. Kwik Save cutted prices in its stores when ALDI and Netto opened nearby. Analysts say that the biggest threat of ALDI to the large supermarket chains is that their low prices will raise consumer awareness of just how low prices can go.

In 1990 ALDI put formal allegations of anti-competitive practices by major supermarket chains to the Office of Fair Trading. According to ALDI the UK supermarket chains were operating like a buying cartel that kept prices up and foreign competition down. The OFT could not find 'firm evidence' in support of these claims and would not start a more formal investigation, but will continue to examine allegations that some manufacturers refused to supply ALDI.<sup>34</sup> ALDI gained a lot of free publicity by its allegations.

In 1991 Tesco, the giant food retailer, has been accused of putting pressure on suppliers whose brands are cheaper in ALDI stores. The pressure has fallen short of discontinuing brands. In August 1991 Burtons Biscuits admitted it had come under pressure from Tesco because its Wagon Whell biscuits were being sold in one of the ALDI stores for 49p (for six) against 59p in Tesco stores. Burtons claims ALDI is paying more than 49p to buy the biscuits. Whitbread, the big brewer, was also under pressure from Tesco because Heineken was sold cheaper at ALDI's than at Tesco's. Whitbread is the

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<sup>30</sup>. Harris International Marketing in Super Marketing, April 17, 1992.

<sup>31</sup>. The Independent on Sunday, 7/4/1991.

<sup>32</sup>. The Observer, 8/12/1991.

<sup>33</sup>. The Sunday Times, 3/2/1991.

<sup>34</sup>. The Sunday Times, 3/2/1991; The Times, 1/3/1991.

official UK distributor for Heineken, but doesn't supply ALDI directly. It is said that Whitbread gave Tesco discounts on 12 and 14 multi-packs in order to enable Tesco to compete with ALDI.<sup>35</sup>

At the end of 1991 ALDI and Gateway (owned by Isoceles) decided to join forces from spring 1992 onwards in three neighbouring stores in the North-East (Durham, Redcar, Wallsend). The Gateway hypermarkets will be split into two stores, each with a separate entrance. ALDI will use 7k square feet at each location, while Gateway uses the remaining 14k square feet. According to both managements the stores will be complementary rather than in competition with each other. ALDI will sell its grocery products at discount rates, while Gateway will sell fresh products and other ranges complementary to those ALDI sells. The media called it an 'unique link-up'. ALDI and Gateway consider the three neighbouring stores as 'pilot projects'. Gateway sold 42 of its stores in the North-East to Kwik Save earlier in 1991. Gateway started a discount chain of its own, Food Giant, in August 1991 and plans to continue it. The 14 Food Giant stores (December 1991) are much larger (38-40k square ft) than the ALDI stores and unlike ALDI they carry a full line of 10,500 products. With the three stores ALDI will gain its first foothold in the North-East. In January 1993 ALDI announced to build a massive distribution centre in Darlington (350,000 sq.ft; 150 employees) to serve a new network of supermarkets through the North-East region.<sup>36</sup>

Early in 1992 ALDI announced plans to move into West Yorkshire, which would mean a direct confrontation with the Danish discounter Netto.

Iceland Frozen Foods noticed that the opening of an ALDI store opposite Iceland's Shirley, Uk store, meant an increase of sales in its own store of 20 %. In March 1992 Iceland Frozen Foods, which claims its business does not overlap, started discussing possible site sharing ventures with a number of discount stores, including ALDI.

ALDI started to build a 150,000 square feet national distribution centre at Atherstone, Warwickshire, worth 14 million pounds (DM 49 million), in April 1992. It has to be finished in February, 1993. The distribution centre will create 300 jobs. In September 1992 ALDI started to move its UK headquarters from Lutterworth to Atherstone.

## 2.7. France

In January 1988 ALDI opened a shop in Croix, near Lille, its first one in France. In 1991 ALDI owns 37 supermarkets in France, in the North and the East.<sup>37</sup> 20 of these stores have been opened in 1991. The total sales surface is 27,933 square meters.

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<sup>35</sup>. Mail on Sunday, 25/8/1991.

<sup>36</sup>. The Northern Echo, 1/1/1993.

<sup>37</sup>. Atlas, 19-26/12/1991.



Since 1988/1989 the three German 'hard discounters' ALDI, Norma and Lidl own outlets in France. Norma and Lidl both own more shops in 1991 than ALDI. In 1990 a survey had already indicated that ALDI was not the cheapest discounter in France.<sup>38</sup>

A survey of OCC Strategy Consultants<sup>39</sup> found that these 'hard discounters' have approximately 300 sales outlets in France in 1992. Together they have a national market share of 3 %. In some regions, however, their market share is up to 8 %. These discounters open 30 % of all new outlets each year. Prices are some 15 % lower than at the French food retailers Casino and Carrefour. The French supermarket chains are advised by analysts to either copy the discounters' techniques of control over costs and prices or reposition themselves by targeting a more specific client sector. Most of the big French chains have now introduced their own hard discount lines on basic food and household items.

## 2.8. Other European countries

There is some -unfortunately often contradictory- information on ALDI's (alleged) activities in three other European countries: Spain, Italy and Luxembourg.

Spain.

In 1989 the Financial Times mentioned that ALDI has interests in Spain.<sup>40</sup> In the same year a German magazine mentioned that ALDI owns an estimated 150 shops in Spain.<sup>41</sup>

In 1991, however, a number of sources reported that ALDI planned to enter the Spanish market, suggesting that ALDI did not yet own any shops in Spain.<sup>42</sup>

A Spanish source<sup>43</sup> suggested in one and the same article that ALDI already owned supermarkets in Spain (by indicating that ALDI was going to merge its supermarket interests in the country) and that ALDI was planning to start activities in Spain. It said that ALDI might try to start activities in Spain through Ifa Española, a central buyer, which already used the ALDI brand name in Spain. The article suggested that ALDI might acquire a stake in Ifa, with which it has had a dispute over the use of the name ALDI.

To complete the confusion in this matter, another, more specialised Spanish magazine writes in 1992 that it is possible that the "king" of discount starts in Spain at the beginning of 1993.<sup>44</sup>

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<sup>38</sup> . Que choisir in Lebensmittel Praxis, 4/10/1991.

<sup>39</sup> . European Retail, 10/11/1992.

<sup>40</sup> . Financial Times, 15/8/1989.

<sup>41</sup> . Industriemagazin, March 1989.

<sup>42</sup> . Forbes, 22/7/1991; Supermarket News, 30/9/1991.

<sup>43</sup> . Dinero & Negocios, 21/11/1991.

<sup>44</sup> . Anuario de la Distribución 1991.

The conclusion is that ALDI must have had plans for Spain for a long period, but that it is not clear what exactly materialized.

Italy.

It is said that ALDI expanded into Italy in the 1980s.<sup>45</sup> One of the most important German food magazines wrote in early 1990 that there were rumours that ALDI would soon set up in Italy and that ALDI has already reserved around 15 outlets of 200-300 square meters.<sup>46</sup> In 1990 another source<sup>47</sup> indicated that there were reports that ALDI indeed had bought 15 sites in Italy. It was understood that ALDI had taken premises in the Lombardi region around Milan and Venetto, near Venice. Sources claimed that ALDI is, for the first time, looking for a domestic partner to help the expansion, due to the fragmented nature of the Italian retail market. Again another source stated at the end of 1990 that ALDI would likely next expand to Italy (and Spain).<sup>48</sup>

The conclusion is again that it is not clear either if ALDI's plans for Italy materialized.

Luxembourg.

In a Dutch specialised food magazine it was said in 1992 that ALDI owns shops in Luxembourg, without any further specification.<sup>49</sup> No other sources have been found confirming ALDI's interests in Luxembourg.

## 2.9. United States of America

Since 1977 ALDI owns stores in the United States. Its headquarters are in Batavia, Illinois (west from Chicago). ALDI sells around 800 articles in its stores.

At first ALDI was not very popular with the American consumer, who is used to more service and a more pleasant shopping environment. Furthermore, there was a scandal about rat infected food articles in a distribution centre near Chicago. But when the recession hit the consumer ALDI's low priced articles became more popular, although ALDI seemed to have some problems with offering its articles cheaper than US discounters. Nowadays ALDI is well-known by most consumers in the neighbourhood of an ALDI store. One of ALDI's main competitors is the discounter Save-a-lot owned by Wetterau.

It is estimated that ALDI owns 337 stores with an average sales surface of 800 - 1,000 square meters

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<sup>45</sup>. Business Magazine, 1/6/1990.

<sup>46</sup>. Lebensmittel Zeitung, 5/1/1990.

<sup>47</sup>. The Grocer, 6/1/1990.

<sup>48</sup>. Supermarket News, 10/12/1990.

<sup>49</sup>. Bob van Schaik in Consudel, 1992.



and estimated sales of DM 2.2 billion in the USA medio 1992.<sup>50</sup> In October 1992 ALDI owns about 350 stores.<sup>51</sup>

ALDI started in the Mid-West, but is now also going to the East. In Pennsylvania some stores and a new distribution centre have been opened; the dc is the ninth in the USA. It is said that ALDI plans to open 2,000 stores in the East.<sup>52</sup>

In Akron, Ohio operates a company called Fred W. Albrecht Grocery Co.<sup>53</sup> This company has a quite different formula and is -as far as could be established- not an ALDI company.

Besides the ALDI supermarkets the Albrecht family owns a chain of 27 supermarkets under the name Trader Joe in California.

The Markus-Stiftung of the Albrecht family has an interest of approximately 11 % in Albertsons Inc. in Idaho, the sixth largest supermarket chain in the USA, with turnover of more than DM 13 billion a year.

### 3. Company Structure

In the beginning of the 1960s Theodor and Karl split the company in two parts: ALDI Nord and ALDI Süd. The official name is Aldi Einkauf GmbH & Co. oHG. in respectively Essen and Mülheim/Ruhr. ALDI Nord, the company of Theodor Albrecht, owns stores in the north of Germany, the northern regions Nordrhein-Westfalen and Hessen. After the German unification ALDI Nord is also active in Eastern Germany. ALDI Nord owns stores in the Netherlands, Belgium, Denmark and France. The logo of ALDI Nord carries the colors blue-white-red.

ALDI Süd, owned by Karl Albrecht, takes care of southern Germany. ALDI Süd owns stores in the Austria, the USA and the UK. The ALDI Süd logo is dominated by the colours yellow, red, blue and orange.

Both ALDI Nord and ALDI Süd use the juridical structure of GmbH & Co.KG, a limited partnership. In 1992 there are 42 of these regional companies with each 50 -100 branches. By dividing the two large companies in little pieces ALDI avoids the laws on publication of company data. The regional

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<sup>50</sup>. Consudel citing Corporate Intelligence (UK), June 1992: 337 stores. Wirtschafts Woche, June 12, 1992, mentions around 340 stores. Another source, The Sunday Times already counted 245 stores in 1991 (February 3, 1991).

<sup>51</sup>. Supermarket News, 12/10/1992.

<sup>52</sup>. Consudel, June 1992.

<sup>53</sup>. Fred W. Albrecht Grocery Co. is run by Steve Albrecht jr. In 1991 it celebrated its 100th anniversary as a family-run firm. This company operates supermarkets under three names: Click, Acme and Y-mart. The Click stores are large, sometimes have video rental and large floral departments, while the Acme's are traditional supermarkets. The Fred W. Albrecht Grocery Co. ranks 9th in a list of the largest privately owned companies in Cleveland, Ohio. Revenues were US \$ 479.8 million in 1991.

companies are often not registered under the name of ALDI or Albrecht, but under the family name of the limited partner, who sometimes only invests as little as DM 800. The largest silent partner in the regional limited partnerships are often one of the two big family foundations, the Siepmann-Stiftung (ALDI Süd) and the Markus-Stiftung (ALDI Nord). The use of these foundations saves taxes. Both ALDI Nord and ALDI Süd have central buying organisations as service institutes for the regional ALDI companies.

It has been estimated that ALDI Nord has a higher turnover and a larger market share in the Federal Republic of Germany than ALDI Süd.

The Albrecht family owns many companies.<sup>54</sup> One is the Hutha Holding GmbH in Berlin. Its purpose is to take interests in other companies.

Another is the forwarding company Spedition Mickleit GmbH & Co.KG in Hamburg of Theo Albrecht and his two sons Theo jr. and Berthold. This company takes care of the forwarding of imported products for the ALDI stores, which arrive in the port of Hamburg. Theo Albrecht and his wife Cäcilie are the owners of a real estate company carrying their names. The Theo Albrecht family also owns chicken factories. Furthermore, the Theo Albrecht family owns a coffee roasting and tea packaging facilities. They also sell insurances to ALDI employees.

Karl Albrechts' wife Maria and his son Karl jr. have interests in a number of ALDI companies, including real estate companies, too.

See the schemes of Theo and Karl Albrechts' empires in the appendix.

#### **4. Financial Situation**

Due to its special juridical form ALDI does not have to publish its financial results. Therefore, only estimates can be made.

For dozens of years ALDI's turnover jumped ahead each year with around DM 1.5 billion. But since 1986 there seems to be some stagnation.

In 1989 ALDI's turnover was estimated at around DM 20 billion.<sup>55</sup> According to estimates the turnover of ALDI Nord was DM 11.9 billion (55 %) and that of ALDI Süd DM 9.7 billion in 1989, leading to total turnover of DM 21.6 billion.<sup>56</sup> In 1989 it was estimated that about one third of ALDI Süd's turnover is realised abroad.<sup>57</sup>

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<sup>54</sup>. Wirtschaft Woche, 12/6/1992.

<sup>55</sup>. Industriemagazin, March 1989.

<sup>56</sup>. M+M Eurodata as cited by Food Trends '91.

<sup>57</sup>. Wirtschafts Woche, 27/1/1989.

The estimates about ALDI's turnover in 1990 vary from DM 24 billion to DM 28.7 billion and DM 29.6 billion.<sup>58</sup> For 1990 ALDI Nord's turnover is estimated at DM 13.2 billion (55 %) and ALDI Süd's turnover at DM 10.8 billion (with total turnover of DM 24 billion).<sup>59</sup> This would mean growing sales for ALDI Nord (+ DM 1.3 billion) and declining sales for ALDI Süd (- DM 1.1 billion). Over 1991 ALDI's turnover is estimated at DM 27.4 billion.

As ALDI is a privately-owned company it does not face the same pressure to produce immediate financial returns as public companies do. Therefore, and because analysts believe ALDI has considerable financial strength<sup>60</sup>, ALDI is able to sustain losses or very small margins for a long time. Because of future prospects ALDI has remained in Denmark, while it is making losses for many years.

## **5. Strategic Policy**

In this paragraph some important elements of the strategic policy of both ALDI and trade unions dealing with the company are described.

### **A. Multinational.**

ALDI has a complex structure (see paragraph 3) and certainly does not want to be seen as a multinational corporation although it has activities in a number of countries. Each company should be seen as an independent one, both juridically and organisatorically. One of the reasons the ALDI management refused to participate in the FIET seminar was exactly the point of not wanting to be labelled a multinational.

It is not consistent that ALDI on the one hand does not want to be seen as a multinational corporation and on the other hand uses Belgium legislation for multinational corporations to its own advantage. ALDI established a Coordination Centre in Belgium (see paragraph 2.3) based on the Coordination Centre Statute, which explicitly states that such a Centre has to be part of a multinational Group with a consolidated turnover of at least BF 10 billion (DM 614 million). This saves ALDI a lot of taxes. Being labelled a multinational has certain disadvantages for a willingly secretive company, especially in the field of providing information. There are specific guidelines on multinational corporations of both the OECD and the ILO about disclosing some basic information (like the number of shops per country, the number of employees, etc.). Dutch based clothing retailer C&A, owned by the family Brenninkmeijer (originating from Germany), is another example of a multinationally operating company that strongly denies being one.

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<sup>58</sup>. Respectively: M+M Eurodata in Lebensmittel Praxis, 4/10/1991; Supermarket News, 30/9/1991 in Consudel, November 1991; Sunday Times, 3/2/1991.

<sup>59</sup>. M+M Eurodata in Lebensmittel Praxis, 4/10/1991.

<sup>60</sup>. Financial Times, 6/9/1990; Yorkshire Post, 30/5/1991.

For national trade unions and international trade union federations this attitude of multinationally operating corporations is difficult, because much energy has to be put in finding even relatively simple information which is needed for further developing strategies.

Perhaps new EC regulations will be developed that will force ALDI and other companies to more openness in the future.

#### B. Demand for all-round and flexible personnel.

The ALDI employees have to be all-round or multifunctionally skilled. They have to memorize the three-digit codes for the 600-700 articles and service the check-outs, clean the shop floors and windows after the shop closes and perform warehouse duties, including heavy lifting and driving internal transport means.

The ALDI employees do not have to learn the prices of the articles, nor do they use scanning equipment. The CPU-system (=Call-Price-Up) is used: the cashier types the codes of an article in and the cash register "knows" and adds the right price of that day. The management often tests the cashiers in order to see if they know all the codes, if they act accurately in order to prevent theft, etc.

Sometimes ALDI employees also have flexible contracts. In Belgium, for instance, ALDI makes use of individual contracts of 28 hours per week averaged out over a three month period.

#### C. Wages and the premium bonus system.

In the countries under review ALDI seems to pay above average wages. Often there is a fixed wage plus a premium bonus system. The premium is calculated on turnover plus working hours divided by the number of staff. In Denmark ALDI pays fixed wages without premiums.

In Austria the total wage is about 30-40 % higher than the minimum wage as agreed upon in the collective bargaining agreement.

In Belgium ALDI works with a OPU-premium system (OPU = Omzet Per Uur = Sales per Hour). This premium is 30 % of the sales per hour of a shop for a full-time working employee (= 36 hours a week). A part-timer receives the premium proportional to her/his contract hours. When the employee falls ill or is on leave the premium still is payed. This premium bonus system makes up a large part of the total salary. The system can have a negative effect on staff because it encourages low staffing levels and a high workload.

In Germany ALDI has claimed that part of the premium payment is to cover small periods of extra time worked by employees, for example when opening or closing up the shops.

In general, trade unions would rather see that wages are not linked to performance.

#### D. Working time/workload/overtime.

For trade unions it is often hard to find out how many hours ALDI employees work exactly. The German trade union HBV developed a booklet that helps to monitor the actual time worked.

In Germany HBV and the Workers' Council often are in conflict with the ALDI management. One of the main issues is that it is the company policy to employ as few employees as possible. The consequence is that the workload is very heavy. Branch managers regularly are required to work (unpaid) overtime of 7,5 hours a week. Other full-time employees have to make overtime for 3 hours a week.

In many countries there is a general debate going on around more opening hours in the retail sector.

At least 150 employees of ALDI Süd in Germany went on strike on June, 21 1988 in order to demand the continuation of shopclosing at 18.30 hours at least until the end of 1989.

In Austria ALDI's company Hofer KG is well-known for its above average wages, but in exchange Hofer expects very extreme results of its employees. Because of the heavy workload employees usually do not stay for a long period. Hofer does not pay the time during lunch. In practise working overtime is often required, especially of part-timers. Part-timers often have to work overtime, because these payments are not taking into account for holiday and Christmas payments. This practise was followed by other food retailers. The trade union therefore has turned it into an issue in the collective bargaining agreement to prevent this kind of abuse.

#### E. Security.

The lack of security in ALDI shops stems from ALDI's determination to cut costs wherever possible. Customers and employees have a common interest to point out to the ALDI management that it has a responsibility in security matters.

In many ALDI stores there is not even a telephone connection, in order to minimize costs. Employees and trade unions have protested against this from the viewpoint of security. It is said that ALDI received complaints from the German fire brigades that they could not be notified quickly enough in an emergency.<sup>61</sup> There seems to be a change of policy from the side of the ALDI management: telephones are being installed in many stores, not for the security of the personnel, but because ALDI is introducing a new ordering system (by modem) for which a telephone connection is needed. In Belgium the trade unions BBTK/SETCa and CNE organised a strike around security issues after a number of incidents, like violent hold-ups, occurred. Unions closed 21 shops for a four hour period to pressurise ALDI. The unions have reached an agreement with ALDI Erpe-Mere NV for a number of stores in the region of Brussels concerning security in March 1992. Telephones and silent alarm systems will be installed, the money will be collected on Saturdays and on other days two employees will take the money to the bank, and camera monitoring will be installed in five stores. The management will only contract security personnel in periods with a high risk.<sup>62</sup> Later on a similar agreement was reached for the province Henegouwen and for ALDI Gembloux NV. The trade unions continue to campaign until all ALDI stores are covered by a security agreement. The demands are: to install telephone in each and every store, to collect money in the stores systematically, to let security personnel check the stores on a regular basis, especially in certain periods.

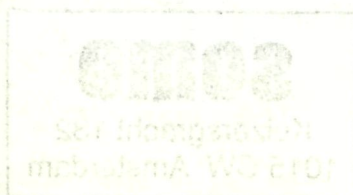
Most Dutch ALDI stores have no telephone connection. Management argues that this is to the advantage of its employees: a telephone would distract the employees so they would realise less sales and -because of the premium bonus system- would receive less salary. The stores that fall under ALDI Drachten BV have to install telephone in its 600 stores, because a labour inspector ordered this. ALDI's neighbours in other parts of the country get tired of passing on messages to the ALDI stores; more and more neighbours refuse to continue this.

In Austria all stores have telephone, so the police can be warned in case of an emergency. There are, however, no other security measures. The trade union GPA has asked over and over again for the

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<sup>61</sup>. Institute of Grocery in Business Magazine, 1/6/1990.

<sup>62</sup>. Letter from Vandaele of ALDI Erpe-Mere NV to Frissen of FETCA, March 31, 1992.



installation of a special emergency key near the checkouts (but without results) and GPA has protested against the fact that employees have to carry the days results to the nearest bank without any protection.

#### F. New technology.

In 1989 ALDI installed a very modern system with Nixdorf-PLU-cash registers (PLU= Price-Looking-Up), connected with NCR-and Nixdorf-8862 computers in the Federal Republic of Germany. This system is equipped for an assortment with maximal 999 articles<sup>63</sup>, indicating that ALDI does not want to introduce as many articles as most other food retailers (outside the discount segment).

ALDI has been slow in introducing technology in shops and central offices in Germany but now its use is extensive. In shops EDP cash registers are used extensively to monitor the frequency of cash transactions. It is also possible to link the cash register with a timing system to monitor working time on a constant basis. Besides, ALDI has been experimenting with self-service payment systems that makes cash payments more difficult, but the reactions from customers has not been very positive so far. Furthermore, card payment systems were being developed to offer customers cash advances. This can cause more work for cashiers and increase the risk of having imbalances in tills.<sup>64</sup>

Although ALDI is starting to introduce different forms of new technology, ALDI not providing ALDI shops with scanning equipment. The ALDI employees still have to learn all the codes of the articles by head. The prices are registred in the computers and the cash registers.

#### G. Bad example in the food retail sector.

In Austria there have been -and still are- many disputes between the Hofer management on the one hand and the trade union and Workers Council on the other hand. Hofer was, for instance, the first trading company to establish an age limit for employing new personnel (35 years) in the country. There have been problems over application forms and labour contracts which did not follow the Austrian laws in all aspects. Furthermore, there are problems at Hofer which are common to the whole food retail sector in Austria (working time, working conditions, overwork payment, etc.). In the last few years the Workers Councils succeeded in improving working conditions for the employees. Hofer's policies have been detrimental to the whole Austrian food retail sector, because other companies tried to copy Hofer's social policy. This led to big conflicts between managements and Workers Councils of these companies.<sup>65</sup>

In Denmark the relations between the trade union HK and the ALDI management are not as good as with other retailers. Working conditions in ALDI are described by HK as poor with little job security and opportunities for career and skills development.<sup>66</sup>

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<sup>63</sup>. Industriemagazin, March 1989.

<sup>64</sup>. Report of the FIET seminar on ALDI North, Brussels, December 10 and 11, 1992.

<sup>65</sup>. Letter from GPA, 19/1/1993.

<sup>66</sup>. Report of the FIET seminar on ALDI North, Brussels 10 and 11, 1992.

## Conclusion

ALDI has been one of the first chains of food discounters. Nowadays it is one of world's largest food retail chains with an estimated turnover of DM 27.4 billion in 1991.

Low prices, few articles, small shops and a sober shopping environment are at the essence of ALDI's formula. Its extremely cost-conscious behaviour leads to problems with its employees. Although ALDI's employees are better payed than those of its competitors work at ALDI is difficult: too few employees per shop, heavy workload, etc. One of the most important issues in ALDI shops in many countries is security. ALDI employees without telephones in the shop and without security guards often -justifiably- do not feel safe. This is an important issue to tackle for employees and trade unions. Especially in Belgium results have been booked by trade unions in this matter.

Other important issues for trade unions are: the premium bonus system in most countries, the introduction of new technology, working hours and working overtime, the demand for multifunctional and flexible employees. Some of these issues are not typical for ALDI, but apply to most food retailers in Europa.

ALDI remains strong on its home market, the Federal Republic of Germany. After the reunification ALDI focuses on states in the former German Democratic Republic. ALDI also operates abroad: in the Netherlands, Belgium, Austria, Denmark, the United Kingdom, France and the United States of America. ALDI operates in some of these countries with success and good profits, like in Austria, and in some of these countries with losses, like in Denmark. ALDI's start in the United Kingdom is a rather recent venture and caused considerable upheaval in the country. ALDI faces stiff competition in many countries, like France.

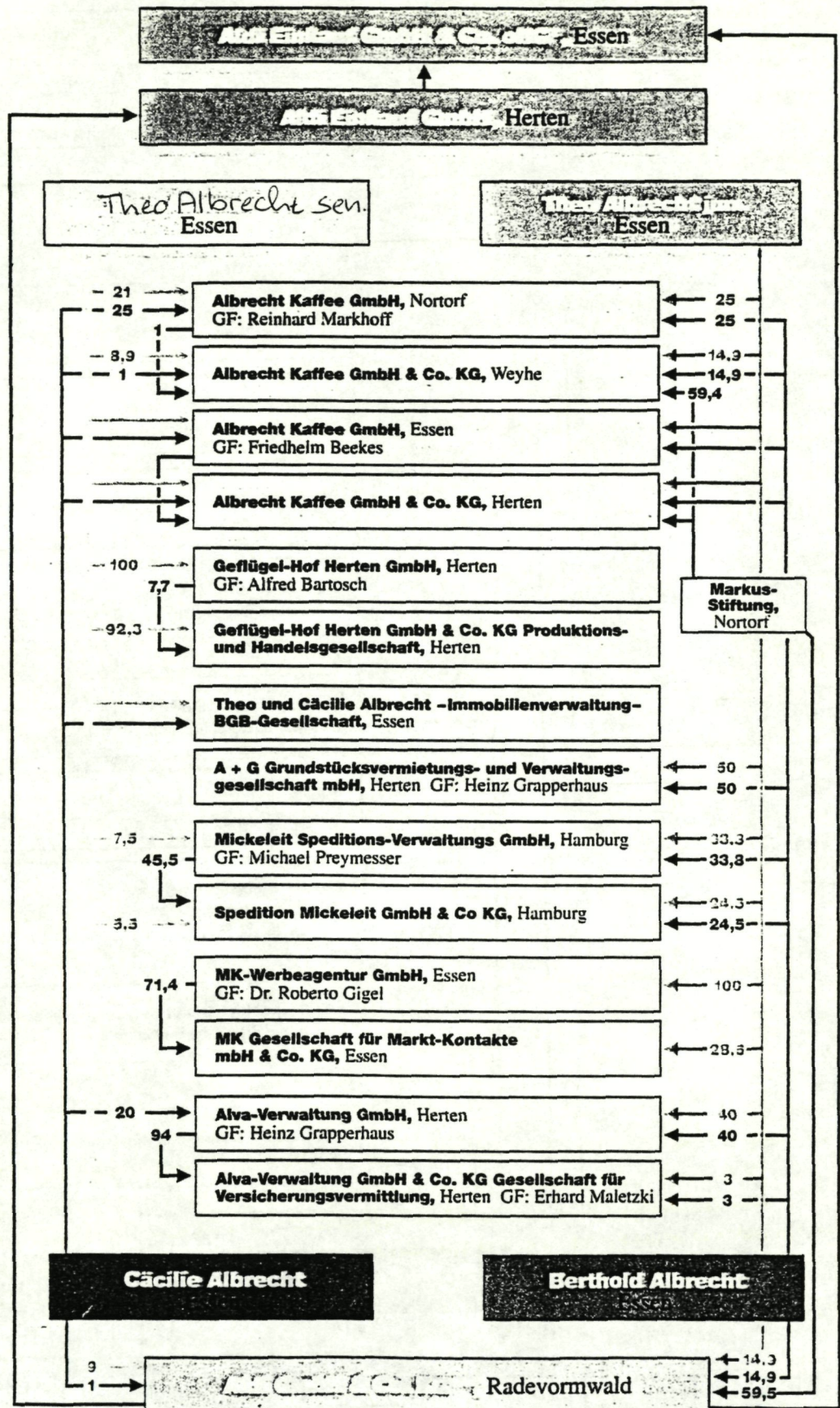
ALDI has payed attention to the possibility of expanding to Spain, Italy and Luxembourg, but it is not clear if ALDI owns any shops in these countries at this moment. It would be useful if trade unionists could look further into this matter.

ALDI's complicated company structures, with ALDI Nord and ALDI Süd and the division of both 'parent companies' in smaller entities, is meant to operate as secretively as possible. By operating that way low taxes can be payed. Another consequence is that employees, trade unions, governments, suppliers and consumers are kept in the dark. They do not even receive the bare minimum of information about the company that is of great importance to their interests. Although there are differences between ALDI Nord and ALDI Süd the things they have in common are more important. ALDI should be seen as a multinationally operating entity by trade unions, the EC, etc. Plans have to be developed to force the company to more openness.

APPENDIX

# Theo Albrechts Reich: Undurchsichtiger Riese

Wesentliche Beteiligungen des Aldi-Nord-Konzerns (in Prozent)

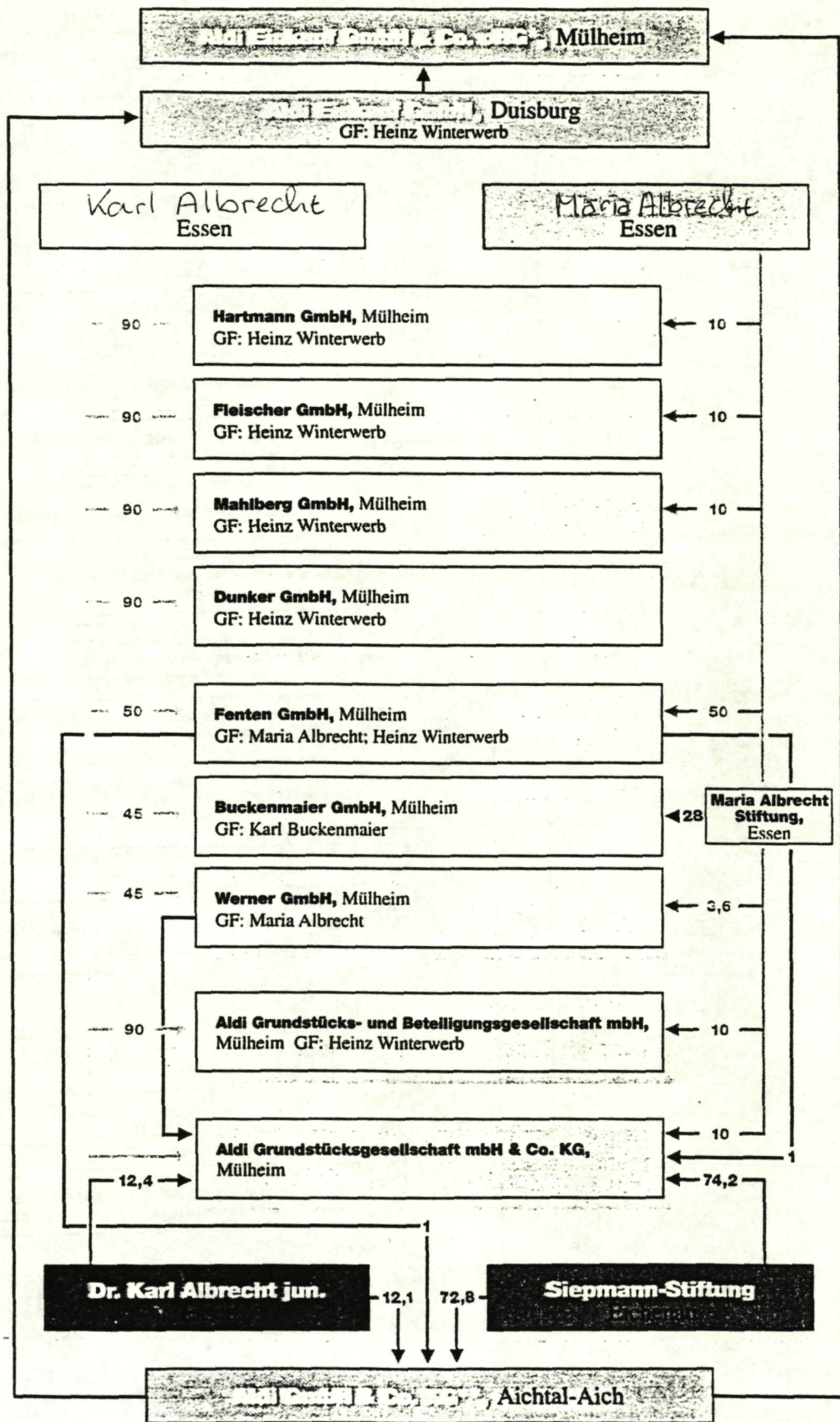


\* weitere Gesellschafter: 13 Aldi GmbH & Co. KG \*\* sowie 19 weitere Aldi-Niederlassungen



# Karl Albrechts Reich: Verschachtelter Multi

Wesentliche Beteiligungen des Aldi-Süd-Konzerns (in Prozent)



\* weitere Gesellschafter: 13 Aldi GmbH & Co. KG \*\* sowie 21 weitere Aldi-Niederlassungen

SOMO  
Paulus Potterstraat 20  
1071 DA Amsterdam (Neth.)  
Telefoon: 020-737515

