

January 2020

Convenience Retailing Conference

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Commercial Director



Agenda



Definition

Market View Full Year 2019

Retail Trade Layout

Stores Universe vs Resident

Universe Evolution

Contribution Convenience vs Super Markets

Summary and Conclusion

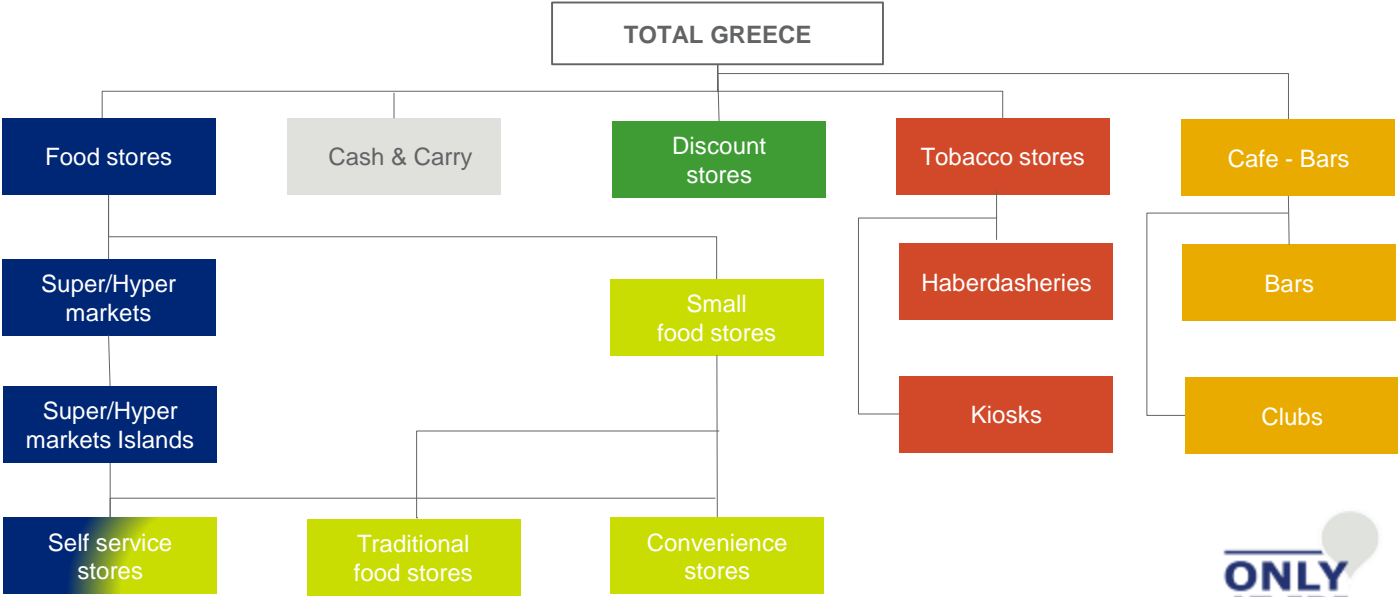
Convenience stores Definition

Cambridge Academic Content Dictionary

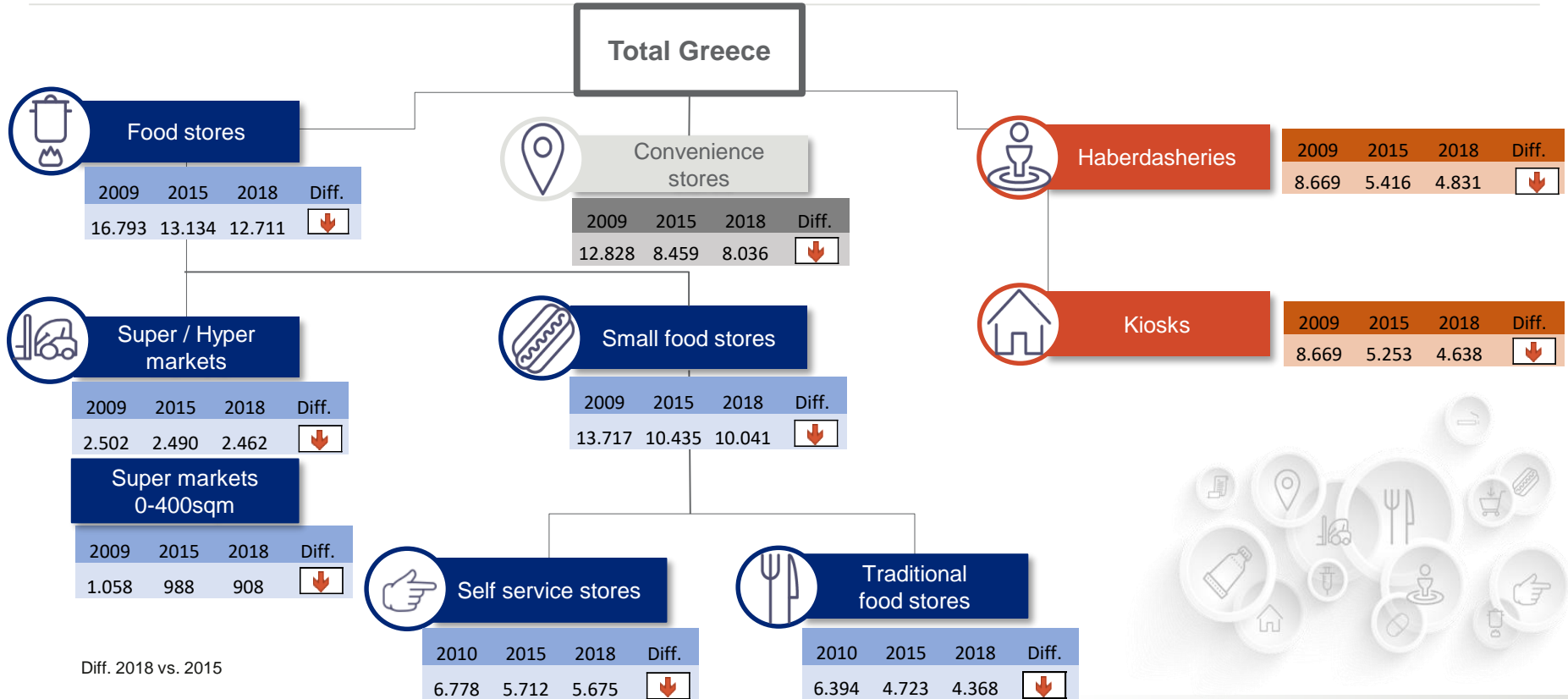
“A small store
often **opens for long hours**
that sells
popular food and other products”



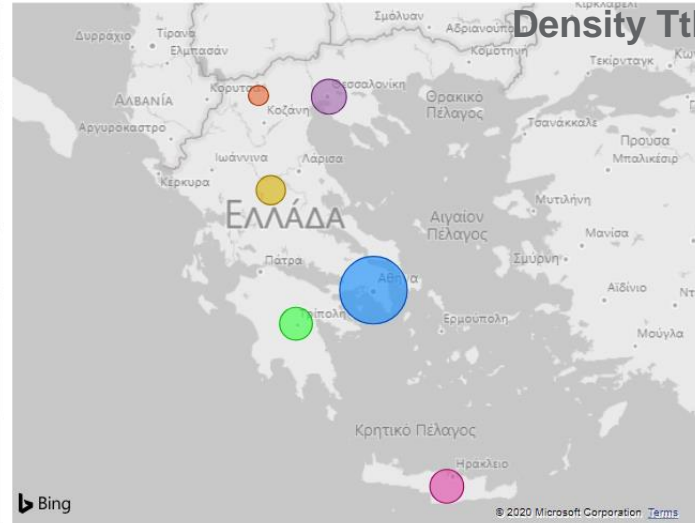
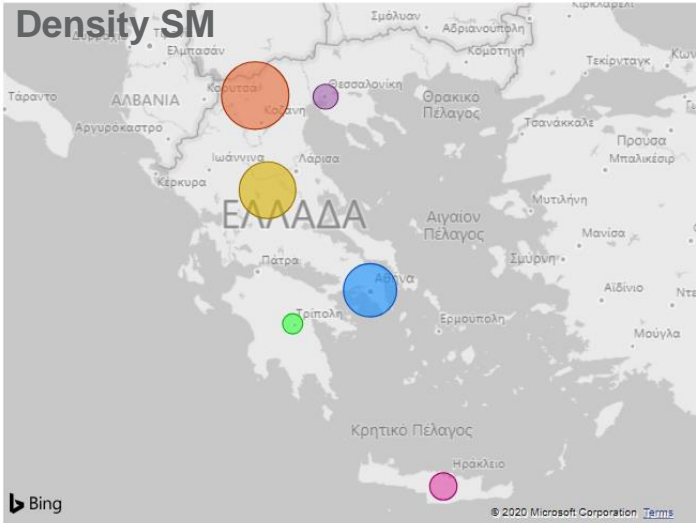
Retail Trade Layout



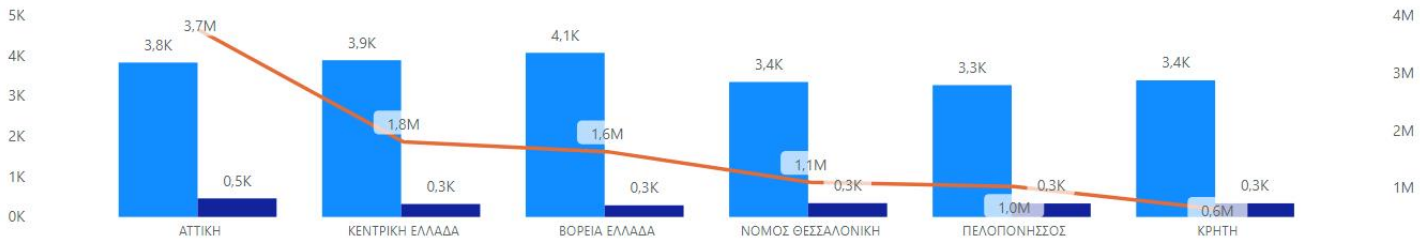
Retail Trade layout



Density vs Population

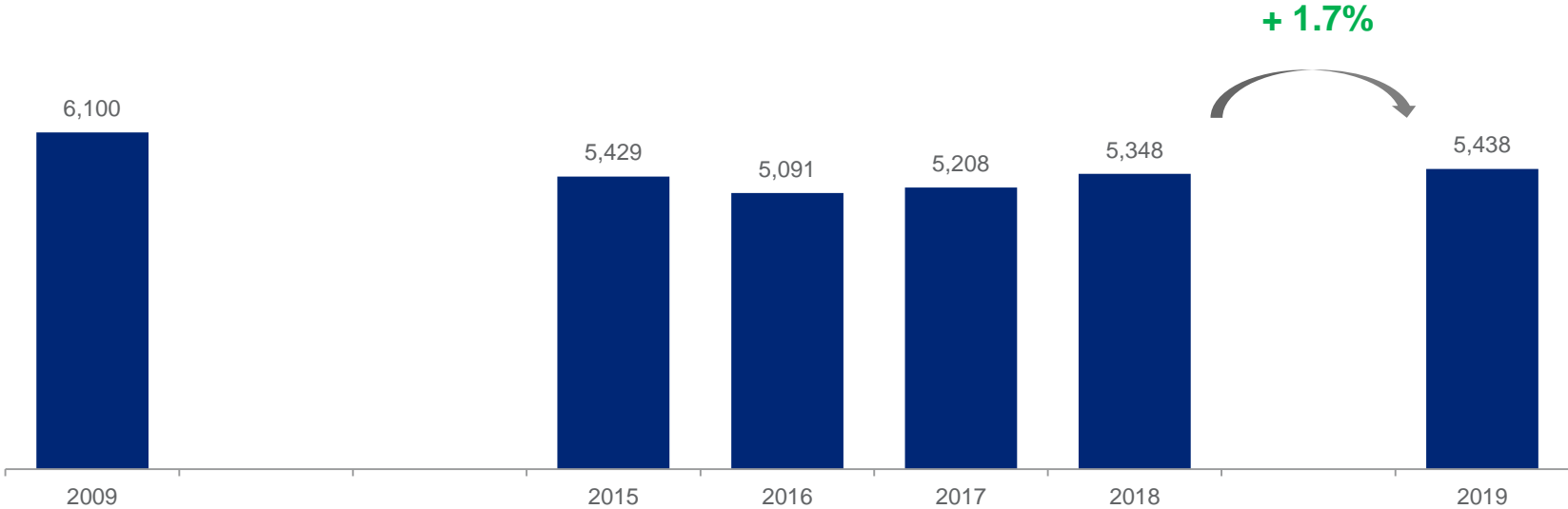


● Density SM ● Density Ttl ● Population



FMCG evolution

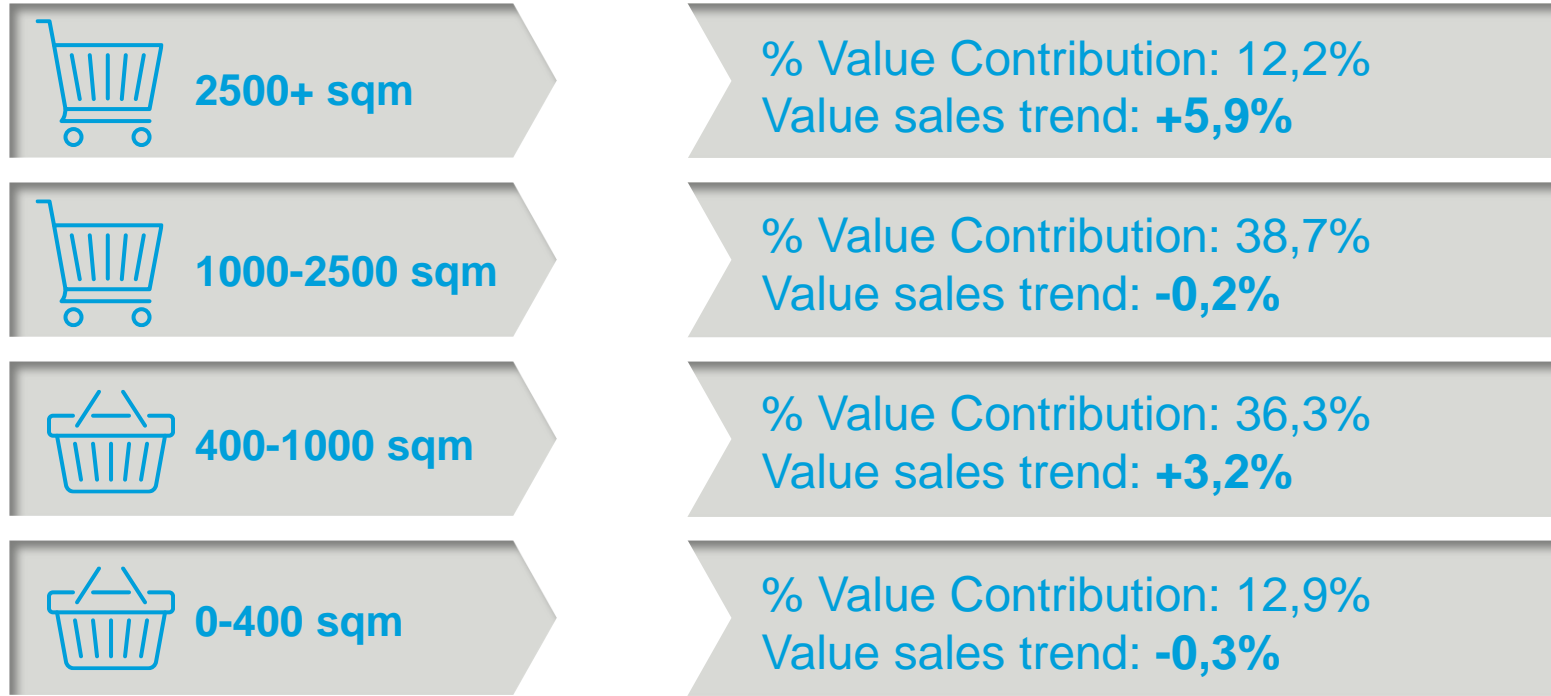
FMCG (Food, HBA, Household) | Super/Hyper markets | Value Sales in mio €



Source: IRI InfoScan, HM/SM, Year 2019

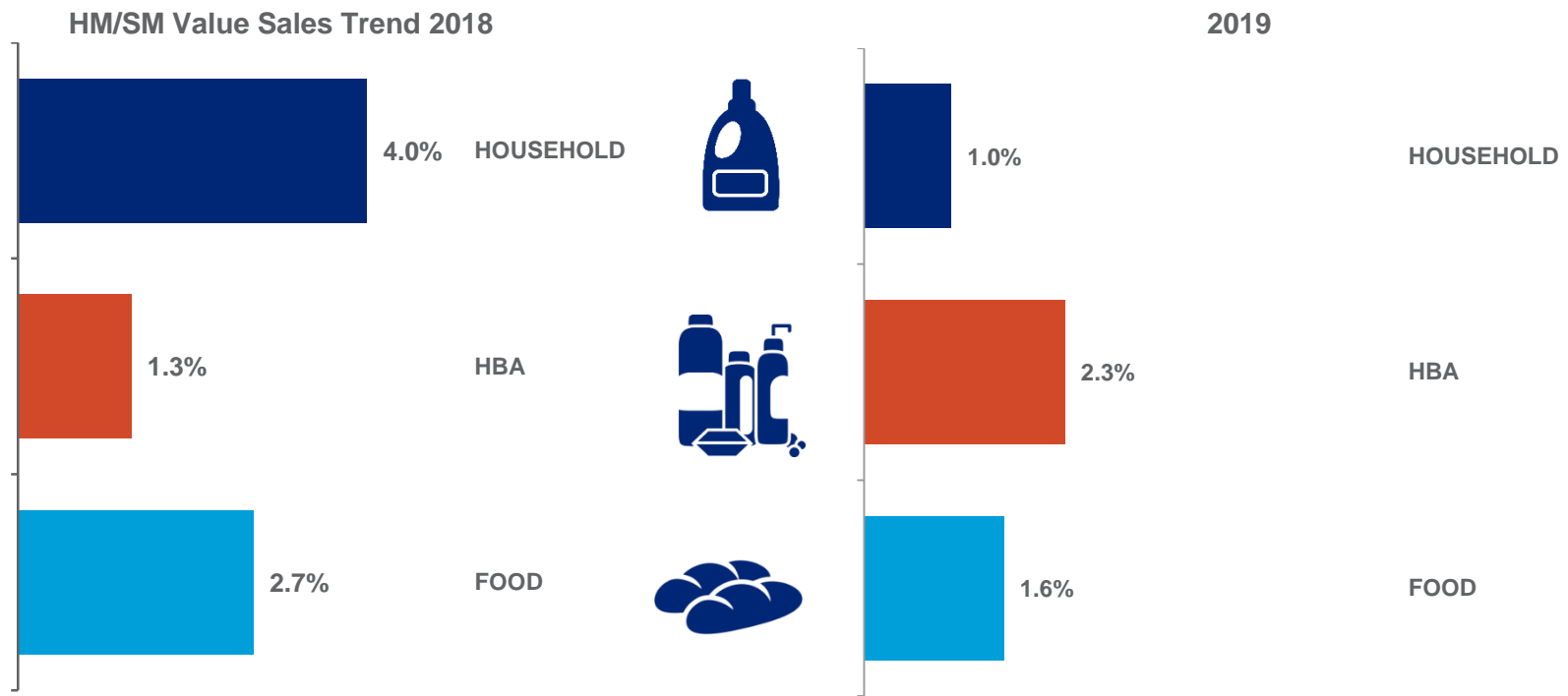
0-400 sqm format decrease their sales value

Trends per Shop Type - Year 2019



Source: IRI InfoScan, HM/SM, YTD: Jan-Dec 2019

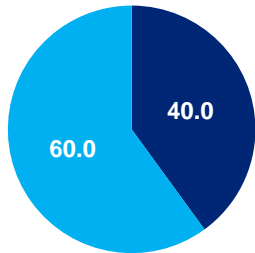
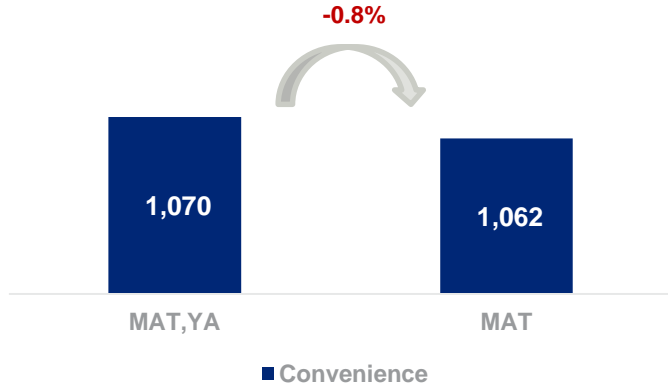
HBA overperforms Food category in 2019



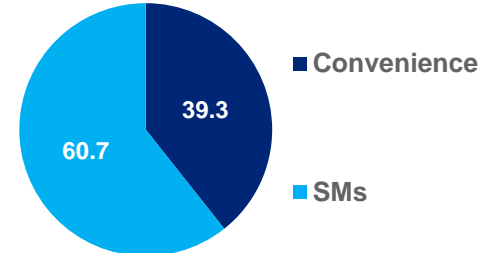
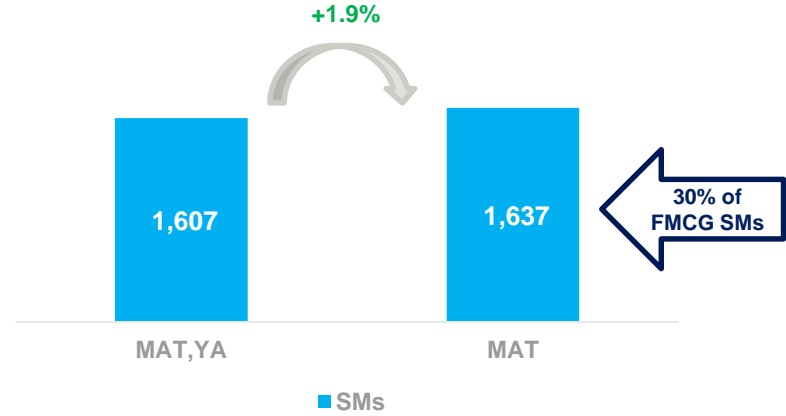
Source: IRI InfoScan, HM/SM, YTD: Jan-Dec 2019

Slightly reduced sales for Small Channel in MAT

25 Top Categories Value Sales Trend in millions – MAT November 19



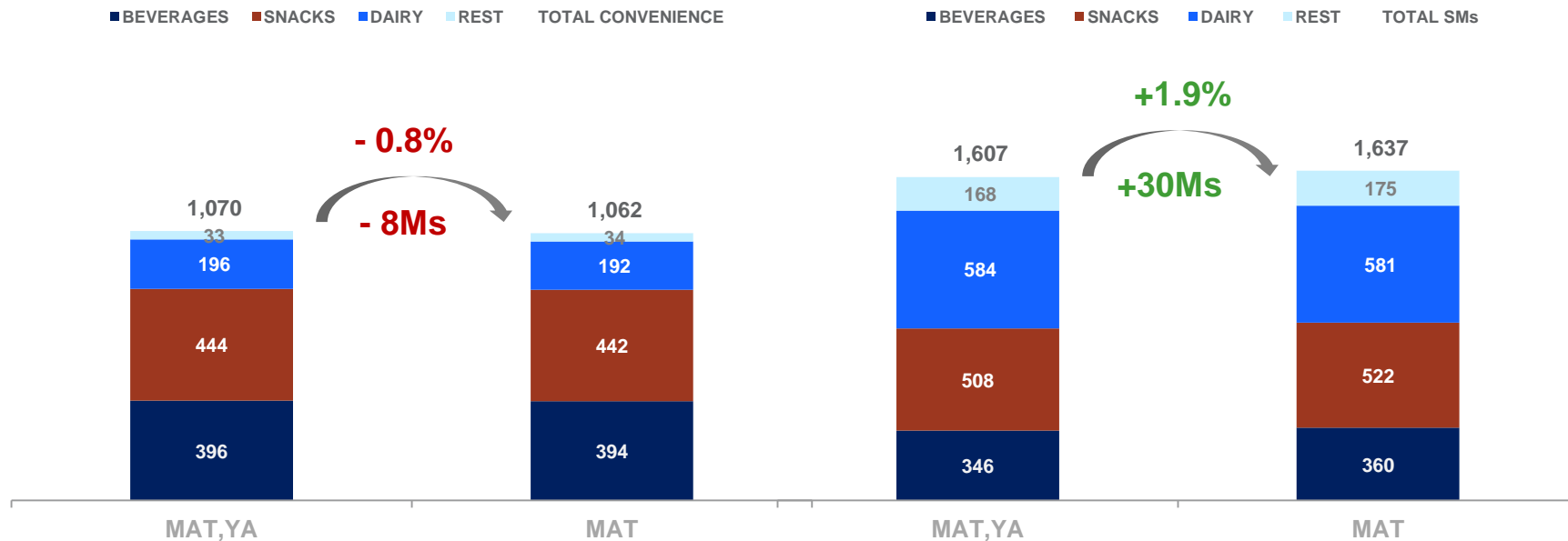
MAT, YA



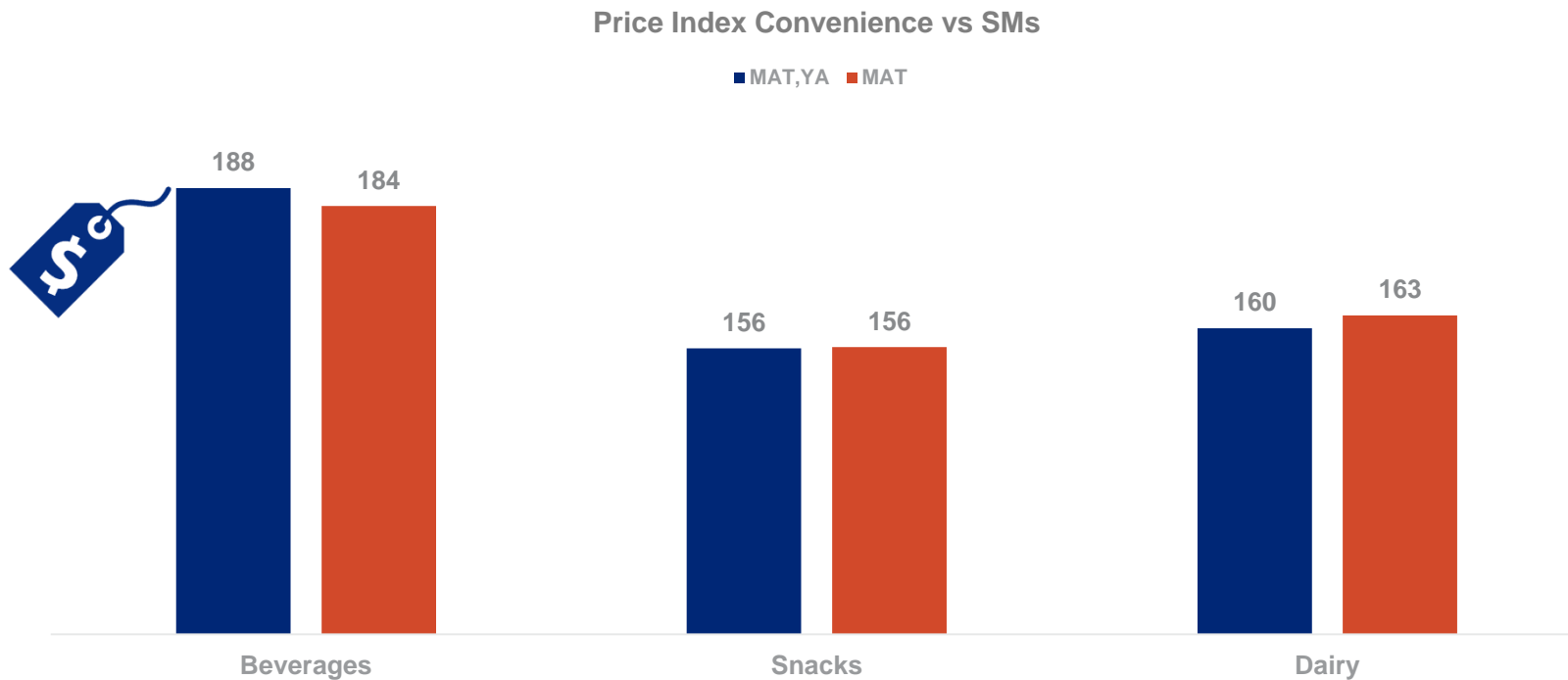
MAT

Reduced sales for Small Channel comes from all 3 Giga Categories

Value Sales Trend per Giga Category in millions – MAT November 19



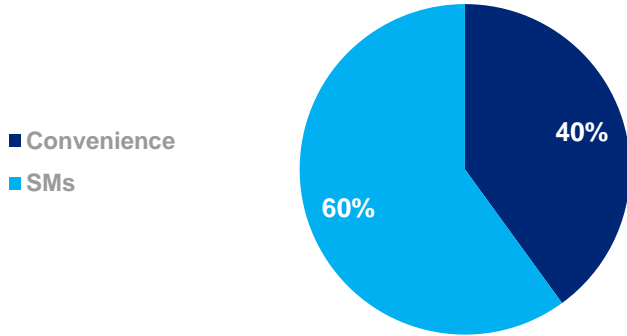
Highest prices in Beverages, although slightly reduced



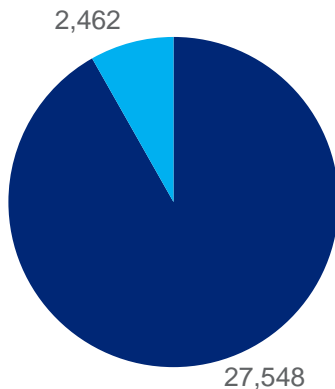
40% of total sales comes from the 15% average number of SKUs

6 Categories coming from Snacking, Bevs & Confectionary have the below results

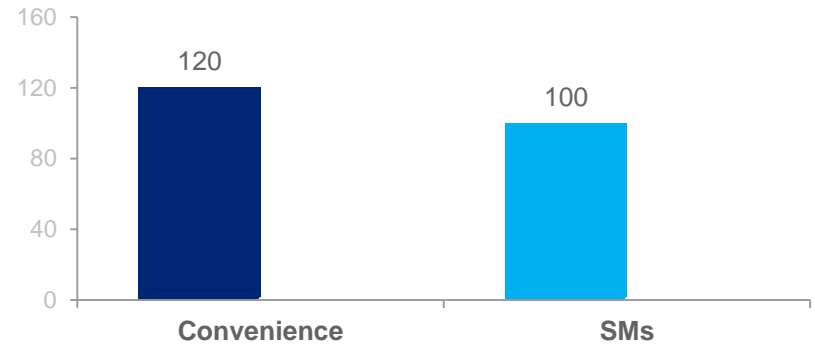
Value Contribution



Stores Number

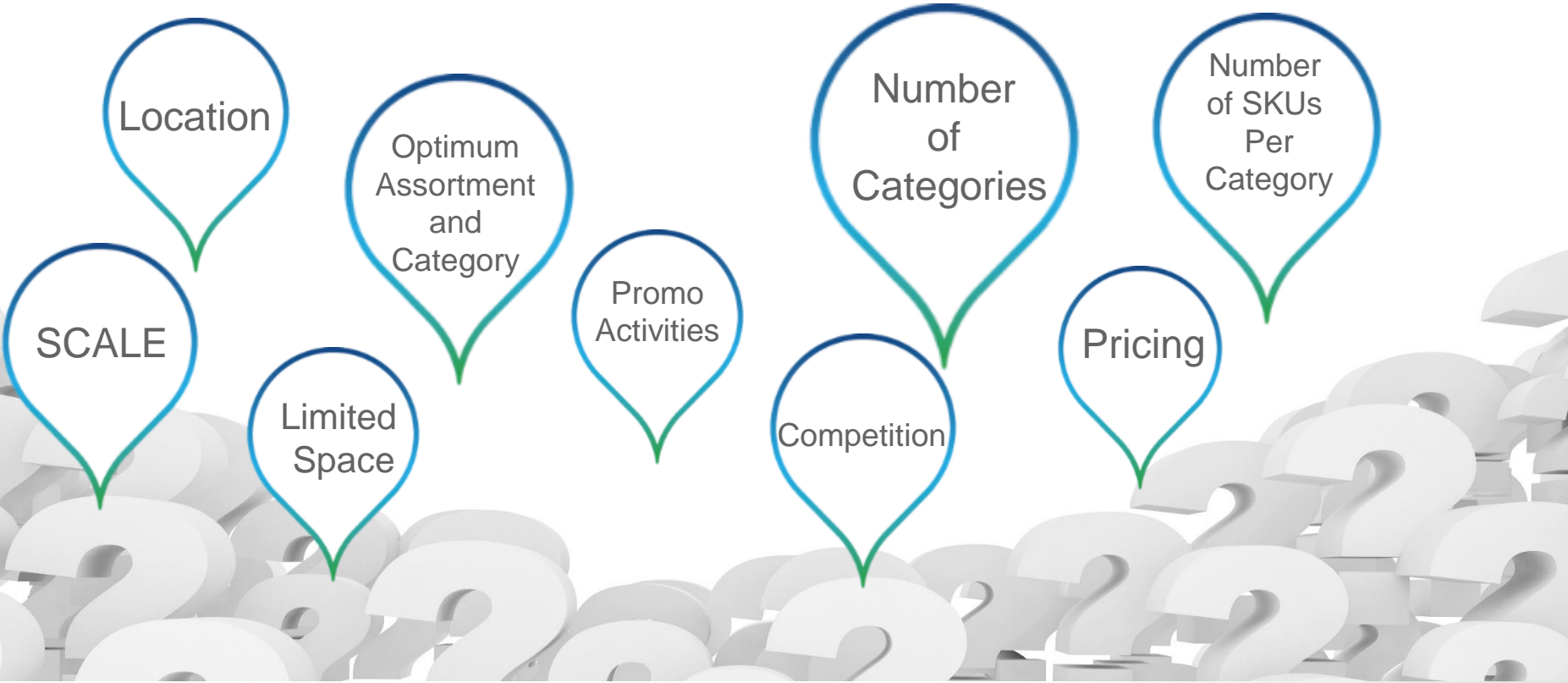


Price Index



“Convenience stores distribute approx. 15% of SKU’s of Super Markets”

Affiliated Challenges





THANK YOU!



For More Information, Contact Us...

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