

EVOLVING STORE FORMATS

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OVERVIEW

- The Retailers
 - The Co-Operative
 - Aldi and Lidl
 - Waitrose
 - Tesco
 - Sainsburys
 - Asda
 - Morrisons
- Conclusions

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THE CO-OPERATIVE

- Convenience offer
- London focus
- Financial Terms



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ALDI/LIDL

- Acquisitive across the UK
- Changing format to allow in-town, High Street and shopping centre
- Planning considerations



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WAITROSE

- Increasingly multi-channel operator
- Click and Collect
- Little Waitrose
- JLP @ Home/Waitrose



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TESCO

- Hypermarkets
- Format 30/40
- Harris and Hoole/Giraffe
- Convenience
- Dotcom



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SAINSBURYS

- GM trading well
- Hypermarket /GM
- Central London
- Convenience



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ASDA

- Hypermarket
- Netto acquisition
- Convenience
- On-line



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MORRISONS

- Nationwide Aspirations
- Convenience
- Corporate Acquisitions
- On-line



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CONCLUSIONS

- The Hypermarkets
- In-fill stores
- Convenience

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