

FOOD WONDERLAND

JDV'S VISION ON THE FUTURE
SUPERSTORE FORMAT





Hello!

Thank you for taking the time to read all about our vision on the new superstore format. What we call the Food Wonderland.

The future superstore is a true Food Wonderland. Creating the ultimate fresh experience fitting today's shopper's mission with a touch of retail theatre.

We are always open for conversation, so please let us know what you think and how you envision the future superstore.

Enjoy!



Index

1. Consumer Behaviour

What is the new customer decision tree?

2. The answer of retail

How can retail claim leadership and answer on changing needs?

3. Easy food solutions

Let's make life easier and offer easy, fast and convenience without compromises.

4. Excitement

Let's make shopping into a true adventure with a full and exciting experience.

5. Food Wonderland

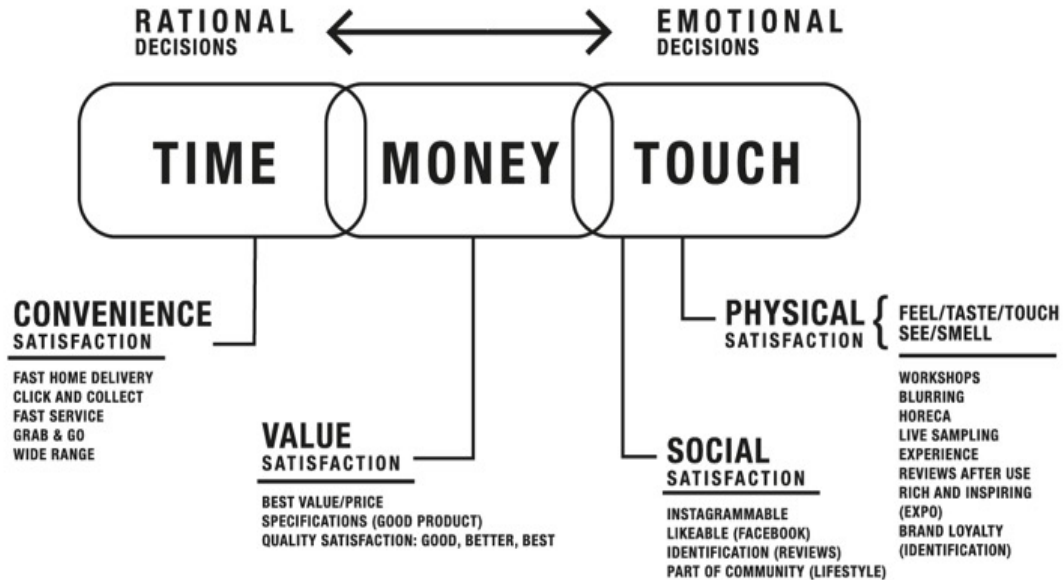
When we bring all this together; we see the future of the superstore.



CONSUMER BEHAVIOUR | SHOPPER'S MISSION

1

UNDERSTANDING THE NEW CONSUMER DECISION TREE



Customers do not think in formats, concepts and formulas. They are driven by their needs. In other words: we have to understand the shopper's mission.

Time

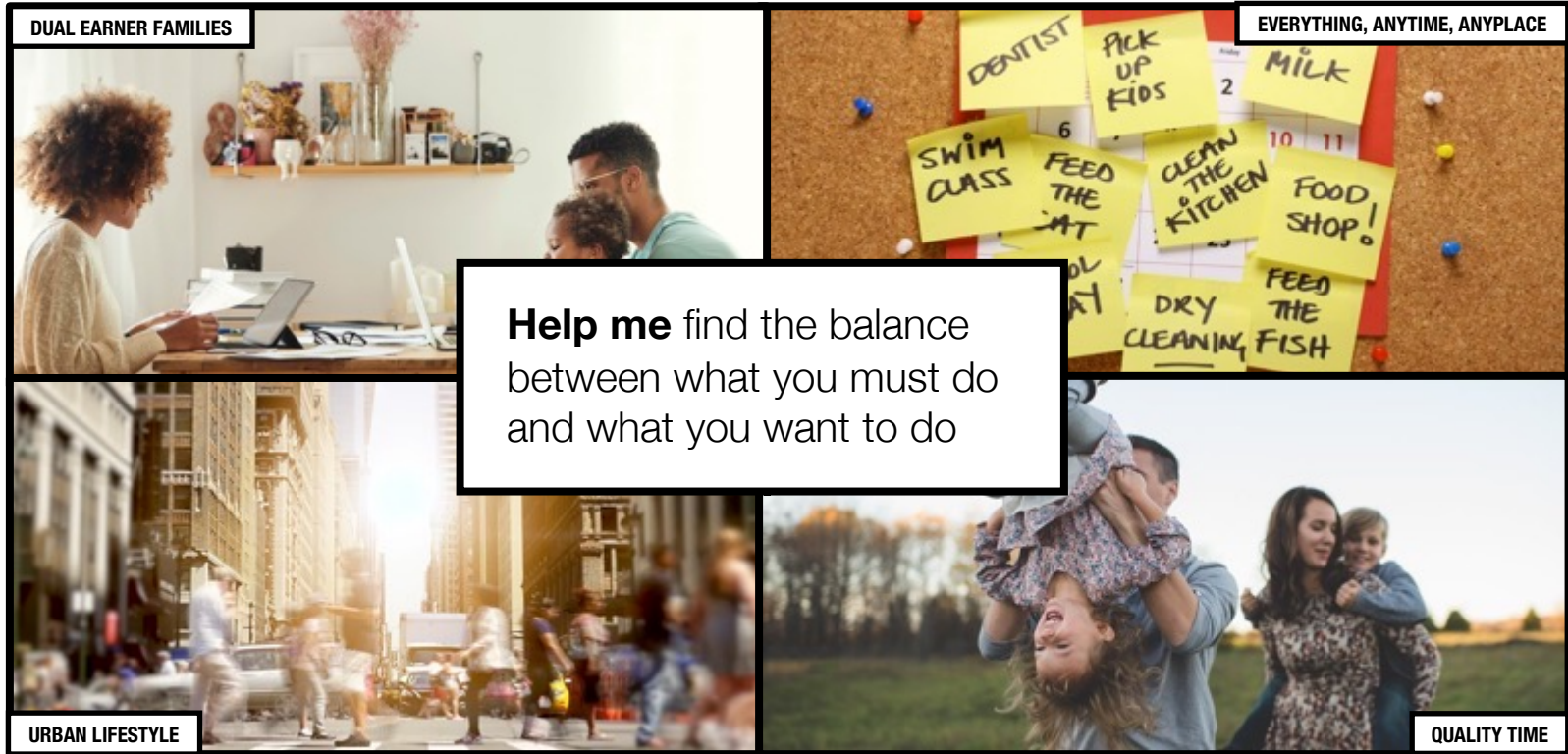
I am driven mainly by the need for easy, fast and convenient satisfaction. A very functional and rational shopper's mission.

Money

I have a tight budget or just want to spend much on this service or product. I am willing to spend some more effort to get the best deal.

Touch

I have some more time and money to spend for an extended experience. Because it enriches me in a social way or in a physical way.



CUSTOMER BEHAVIOUR | GENERATION Z & MILLENIALS



61%

DOES NOT FEEL LIKE COOKING
AT LEAST ONCE A WEEK



44%

HAS FOOD DELIVERED IF
NOT FEEL LIKE COOKING



48%

GOOD FOOD IS A WAY TO
DISTRACT FROM STRESS



59%

WANTS TO SAVE MORE
I THE COMING PERIOD



34%

IS CONCERNED ABOUT JOB OR
TO BE FINANCIALLY AFFECTED
BY THE CRISIS

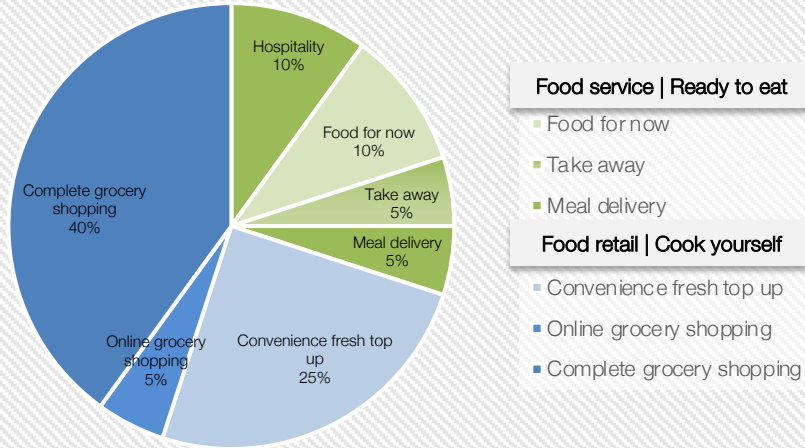


24%

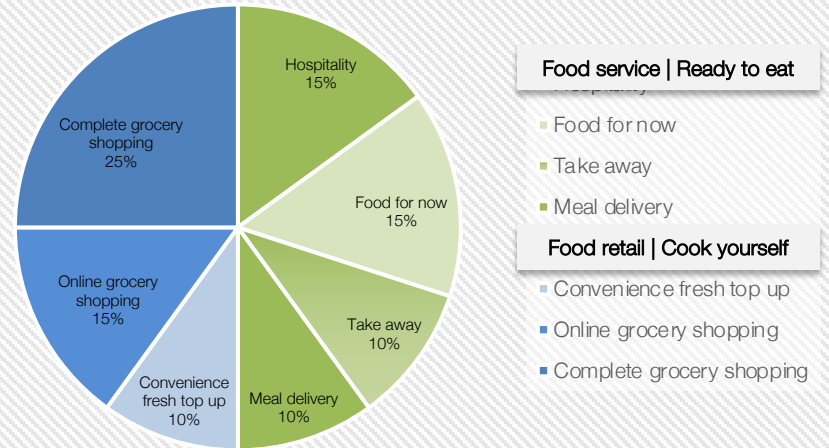
CAN HARDLY MAKE
THE ENDS MEET

Percentages are averages of Generation Z and Millennials together
Source: TFRC / FSIN, Foodshopper onderzoek 2021

Share of stomach 2020



'What if scenario'
Share of stomach 2027



WHAT IF EUROPE WILL FOLLOW THE AMERICAN STANDARD?

And out of home consumption will grow to a market share of 50%.

CONSUMER BEHAVIOUR | SHOPPING TRIPS

Consumers do not think in channels or segments. Especially younger consumers use different arguments to make up their mind and chose a solution for their needs.

When and what do I want?

- Direct consumption
- Today
- This week
- This month
- This year

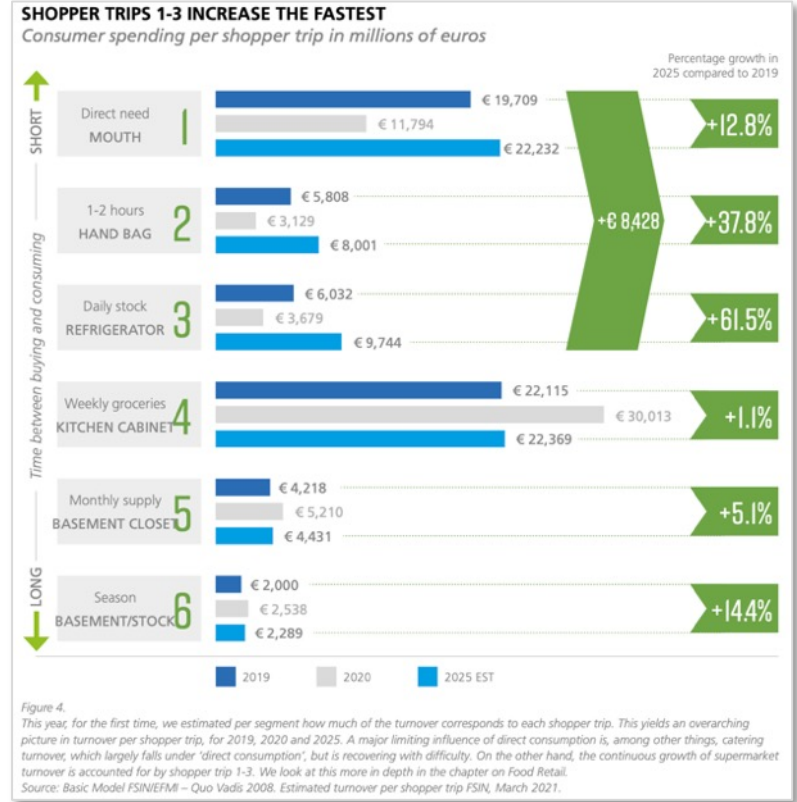
Why do I want it?

- Because it is part of my routine
- Because it is easy, fast and/or comfortable
- Because it creates a wow-experience, offers enjoyment and/or excitement

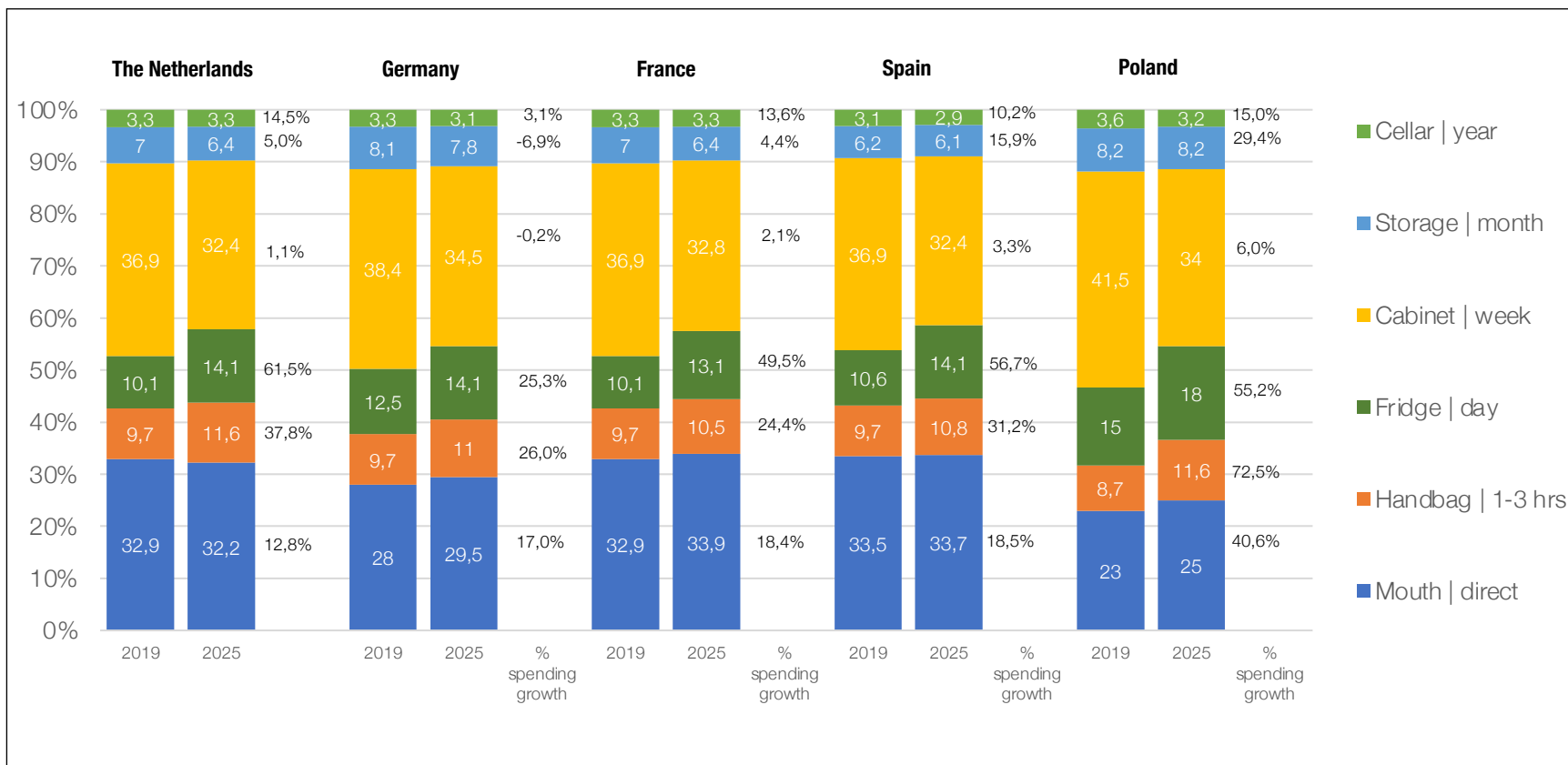
Where do I want it?

- While on the move
- While at home
- At a location out of home

Example The Netherlands



CONSUMER BEHAVIOUR | SHIFT TO THE SHORTER TERM CONSUMPTION



Source: Planet Retail & FSIN

CONSUMER BEHAVIOUR | READY FOR THE FUTURE?

- Consumers will shorten the time between buying and consumption; growth from weekly to daily shopping
- Great potential for easy food solutions creating healthy, tasty and attractive ways to make life easier
- Home meal delivery is claiming share of stomach, food retail answers with easy food solutions ready to eat and heat
- The number of hot items and ultra-fresh items will grow in all formats, due to changing shopping behavior





THE ANSWER OF RETAIL | MODULAR THINKING

2

THE ANSWER OF RETAIL | OPTIMISED MULTI FORMAT UNDERSTANDING

Multi format has conquered the European market. Multi format strategy understands the different shopper's mission on the different moments and always comes with a relevant answer on the unique shopper's mission under one brand umbrella. But be careful, a true multi format strategy is not real estate but function driven!

Multi format ≠ multi real estate

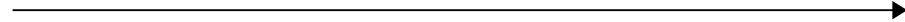
- Location profile sets role of format
- Format role defines proposition
- Format proposition defines store size

Multi format ≠ linear sqm extension

- Extra space for additional concept modules
- Only when relevant for location profile





MULTI FORMAT								
ONLINE FOOD SERVICE	FOOD SERVICE	CONVENIENCE	NEIGHBOURHOOD	SUPERMARKET MEDIUM	SUPERMARKET LARGE	SUPERSTORE	HYPERMARKET	ONLINE STORE
Ready to eat	Ready to eat	Grab&Go	Fresh Top-up	Stock-up			Bulk-up	Bulk-up
1 hrs <	1 hrs <	4 hrs <	32 hrs <	72 hrs <	Week <	Month <	Month >	Month >
Range	+	+	++	+++	++++	+++++	++++++	+++++++
Size	x	+	++	+++	++++	+++++	++++++	x
Speed	0	+++++	++++	+++	++	+	+	0
Spend	+	+	++	+++	++++	+++++	++++++	+ - ++++++
Margin	+++++	+++++	++++	+++	++	+	+	+
Sales/m2	-	+++++	++++	+++	++	+	+	x

IMPULSE
FOOD FOR NOW








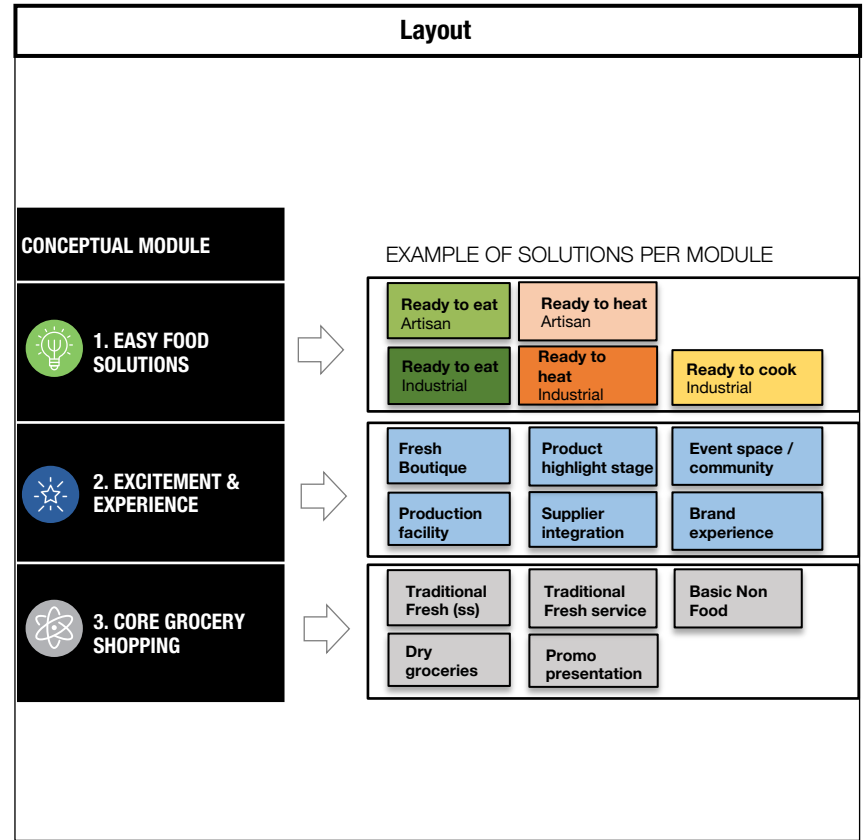
PLANNED
FOOD FOR LATER

THE ANSWER OF RETAIL | LEARNING FROM THE FOOD MARKET

Food for later	Food for now	Integration food for now and later	Foodmarket integrated in other concepts
Farmer's market/Souk market	Foodcourt Streetfood	Foodhall	Shopping centre
			
			Super- market
			Department store

THE ANSWER OF RETAIL | HIERARCHY OF FORMATS LEADING TO MODULAR APPROACH

Format		
FORMAT	DESCRIPTION	SIZE
 1. CONVENIENCE STORE	Small format grocery stores. Stores typically have extended opening hours and are located in convenient high-traffic sites, such as along major roads and transport hubs. Examples of convenience stores include: Tesco Express, Carrefour Express.	< 400 sqm
 2. NEIGHBOURHOOD STORE	Small grocery outlets selling a wide selection of food, drinks, grocery and household essentials. Stores are typically found in secondary locations such as residential neighbourhoods. Examples of neighbourhood stores include: Coop, SPAR, Auchan A2Pas.	around 400 sqm
 3. SUPERMARKETS	Self-service store with a largely grocery offer, ranging from 400 to 2,500 square metres. Examples of supermarkets include: Trader Joe's, Champion.	400-2500 sqm
 4. DISCOUNT STORES	Limited assortment self-service supermarkets. Stores are characterised by low service levels, low prices and usually high penetration of private label products. Examples of discount stores include: Aldi, Lidl, Dia.	up to 1500 sqm
 5. HYPERMARKETS & SUPERSTORES	Bigger stores with an extended assortment and experience. The focus of the food market is on food, the hypermarket also offers an extended non food assortment.	2500 >





MODULE | EASY FOOD SOLUTIONS

3

MODULE | EASY FOOD SOLUTIONS



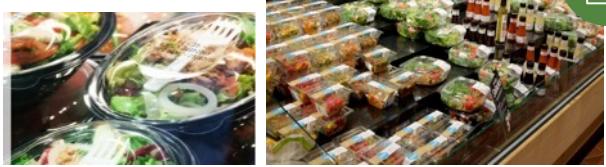
MODULE | EASY FOOD SOLUTIONS

READY TO EAT

Ready to eat
Artisan



Ready to eat
Industrial



Out of home

READY TO HEAT

Ready to heat
Artisan



Ready to heat
Industrial



At home

READY TO COOK

Ready to cook



At home

MODULE | EASY FOOD SOLUTIONS

WELKOM BIJ DE NIEUWE AFDELING
PANNETJE VAN PLUS

PADELLA STORY
Vanaf nu verkopen we heerlijke warme Pizzas en Padella's op de afdeling **PANNETJE VAN PLUS**. Een pizza kennen we allemaal en we leggen je graag uit wat een Padella is.

DE BODEM IS GEMAAKT VAN MEEL, MELK EN EIEREN

WID VULLEN DEZE MET HEERLIJKE, GEZONDE EN DIVERSE INGREDIËNTEN

KEUZE UIT 6 VARIANTEN

1 PADELLA IS GENOEG VOOR 1 PERSOON

BINNEN 3 MINUTEN VERS GEMAAKT EN GEBAKKEN TERWILDE WACHT

ONZE WARMES PIZZAS EN PADELLAS HAAL JE AF IN DE WINKEL OF BESTEL JE GEWONDIG VIA THUISBEZORGD!

PLUS & Lam PizzaExpress

Pannetje van Plus is a Dutch concept realised with a Plus Franchiser. A food service concept within the supermarket format selling ready to eat and ready to eat products that are more healthy, more fun and more attractive. It is an enormous success.





MODULE | EXCITEMENT

4



MODULE | EXCITEMENT

Fresh boutique



Product highlight stage



Event space / Community



Production facility



Supplier integration



Brand experience



SUSTAINABLE

ORGANIC GROWN BY CERTIFIED FARMERS

VEGGIE & VEGAN

Enrich me with a better story and show leadership

{ 40 MOUTHWATERING }
VEGAN DINNER
RECIPES!

FAIRTRADE & ORIGIN

EDWARD PRENDVILLE
VEGGIE & VEGAN LONDON
A GUIDE TO ETHICAL EATING IN THE CAPITAL

HEALTHY LIFESTYLE

Easy to throw out.

Better to throw on.

We make a living by what we get, but we make a life by what we give.
Winston Churchill

Stop focusing on how much you eat & start focusing on what you eat.
FOOD MATTERS®

- Fair and healthy choices

With every pair you purchase, TOMS will give a pair of new shoes to a child in need. **One for One.**

FAIRTRADE: IN NUMBERS

££££ 1 OUT OF 4: POUNDS SPENT ON FAIRTRADE PRODUCTS, ARE SPENT IN SANSBURY'S.

👤👤👤 2 OUT OF 3: PEOPLE UNDERSTAND THAT THE FAIRTRADE SYMBOL MEANS 'A BETTER DEAL FOR FARMERS AND WORKERS'.

👤👤👤👤👤 6 OUT OF 10: CONSUMERS BELIEVE THEIR SHOPPING CHOICES CAN HELP FARMERS AND WORKERS IN POORER COUNTRIES.

👤👤👤👤👤👤 7.5 OUT OF 10: SHOPPERS BELIEVE INDEPENDENT CERTIFICATION IS THE BEST WAY TO VERIFY A PRODUCT'S ETHICAL CLAIMS.

SOURCE: [HTTP://WWW.FAIRTRADE.ORG.UK/WHAT_IS_FAIRTRADE/FACTS_AND_FIGURES.ASPX](http://www.fairtrade.org.uk/what_is_fairtrade/facts_and_figures.aspx)

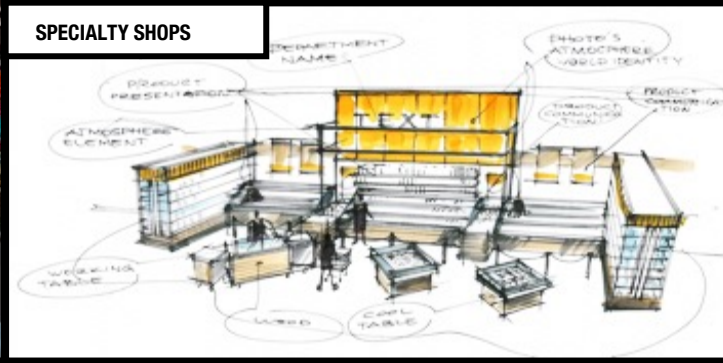
SOCKS ARE THE MOST REQUESTED ITEM IN HOMELESS SHELTERS

ONE PAIR PURCHASED = ONE PAIR DONATED

MODULE | EXCITEMENT

EXCITEMENT

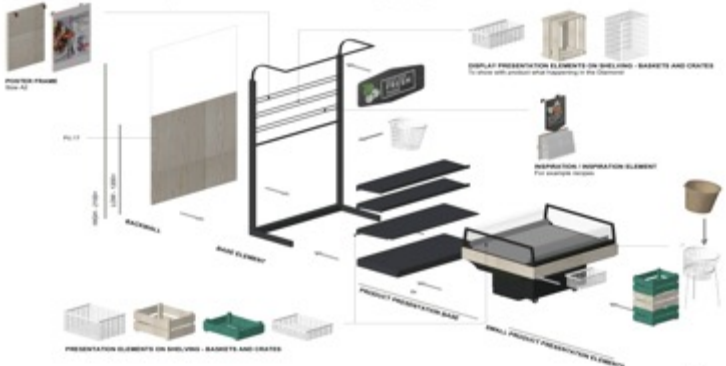
- Tastes from around the world
- Transparency food chain
- Diversity
- Communal dining
- Authentic experience
- Shareable & instagrammable
- Always surprising
- Re-use of empty spaces



MODULE | EXCITEMENT

**MODULAR
FLEXIBILITY
IS CRUCIAL**

D2.0 DIAMONDS | SYSTEM OVERVIEW



WALL SOLUTION



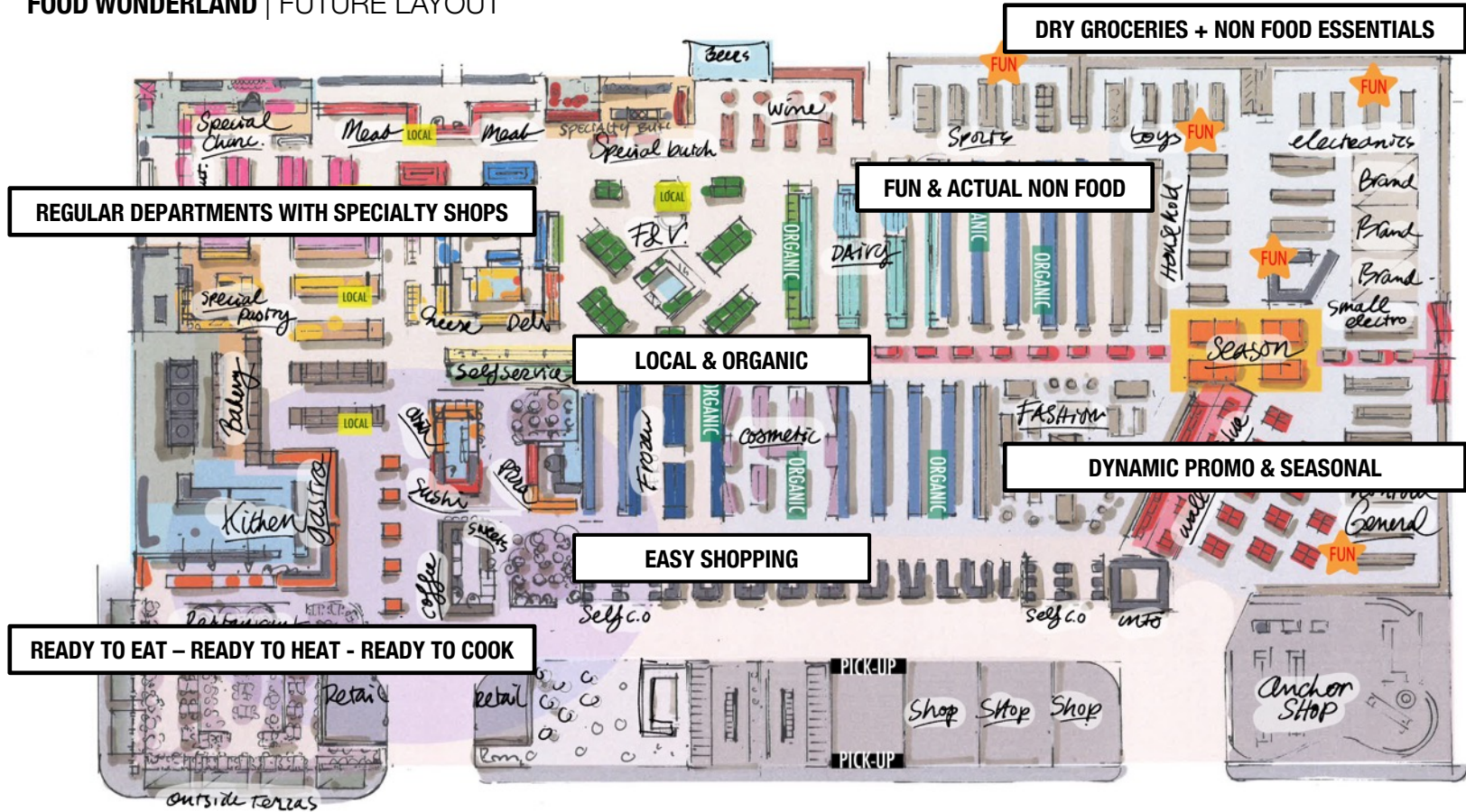
ISLAND SOLUTION



FOOD WONDERLAND | FUTURE SUPER STORE

5

FOOD WONDERLAND | FUTURE LAYOUT



FOOD WONDERLAND | SPECIALTY SHOPS

FRANCE

Worlds finest pastries and bread



ITALY

Worlds most delicious and fresh
pasta's and pizza's



IRELAND

Worlds most juiciest meat



BELGIUM

Worlds most tastiest chocolate



THE NETHERLANDS

Worlds silkiest dairy



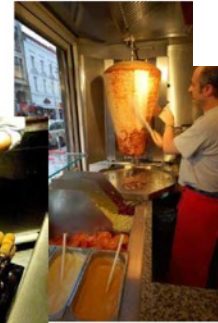
SWISS

Worlds most tastiest cheese



TURKISH

Worlds tasties doner kebab

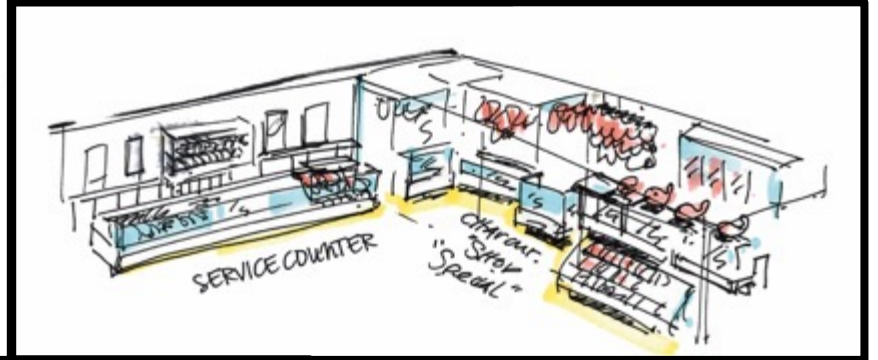
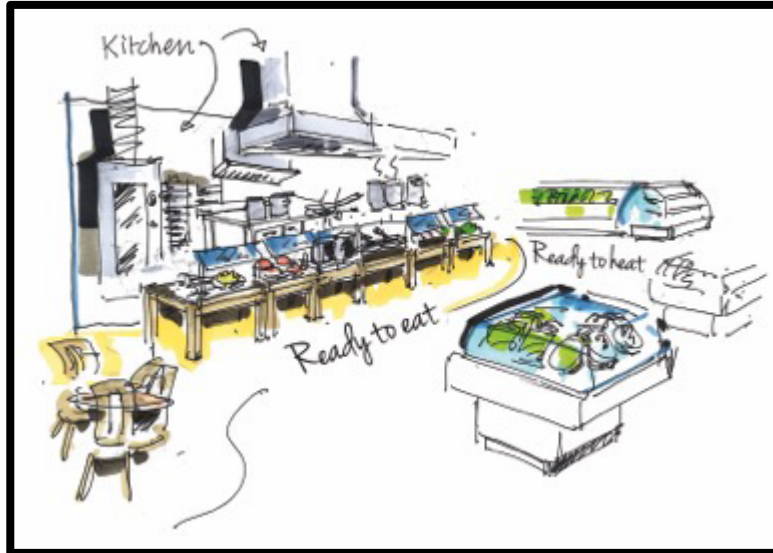


GREECE

Worlds best quality olive oil



FOOD WONDERLAND | SPECIALTY SHOPS





THANK YOU

josdevries.eu