

# Global HBC retail trends

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## Planet Retail

- Provides retailers, suppliers and investors with critical insights on the global retail industry that create competitive advantage;
- Has macroeconomic insights into 211 countries
- Monitors 7,000 retail and restaurant operations
- Delivers daily news, a weekly magazine, reports, executive opinion briefings.

*Continually updated by global team of analysts*

The screenshot displays the Planet Retail website interface. At the top, there is a navigation bar with links for 'About Us', 'Media', 'Events', 'My Account', 'Company Methodology', 'Country Methodology', and 'Logout'. A search bar is located on the right side of the navigation bar. Below the navigation bar, there is a main content area with a large banner for 'Planet Retail's 2011 Global Retail Ranking Posters' and a 'Download now' button. The banner also features a bar chart with categories: Foodservice, Non-Grocery, and Grocery. To the right of the banner is a 'MY ACCOUNT' section for user 'Elisa Williams', including contact information and a 'Watch our training video' button. Below the banner are several sections: 'CUSTOMISE HOMEPAGE' with checkboxes for 'Companies & Banners', 'News & Insight', 'Countries', 'Reports', 'Data Analysis', 'Stay Connected', 'Images', 'Store Tours', and 'Latest Updates'; 'MY NEWS & INSIGHT' with a list of news items including 'Planet Retail's 2010 Mergers & Acquisition Ranking', 'BURGER KING introduces ice cream to US menu', 'KESA ELECTRICALS continuing sale talks', 'NETFLIX to split DVD rentals under Qwikster and offers CEO apology', 'CARREFOUR looking to re-enter Russia', and 'JOUECLUB launches click & collect service'; 'REPORTS' with a 'Recommended' report titled 'State of the Sector: Foodservice in Japan, 2011' and a 'Recently Viewed' report titled 'CIO Interview - Kroger'; 'LATEST UPDATES' with tabs for 'My Updates', 'All Updates', and 'New Features'; 'STORE TOURS'; 'COMPANIES & BANNERS'; 'COUNTRIES'; 'DATA ANALYSIS'; 'IMAGES'; and 'STAY CONNECTED' with RSS feeds for 'Boris's Economy Blog', 'Rob's Global Retail Blog', and 'Natalie's Grocery Blog', along with social media links for Facebook, Twitter, and LinkedIn. At the bottom, there is a footer with the text 'Your definitive resource for global retail intelligence', copyright information for 2011 Emap, and the Planet Retail logo with the tagline 'Powering Retail Decisions'.

# Sample Clients of Planet Retail



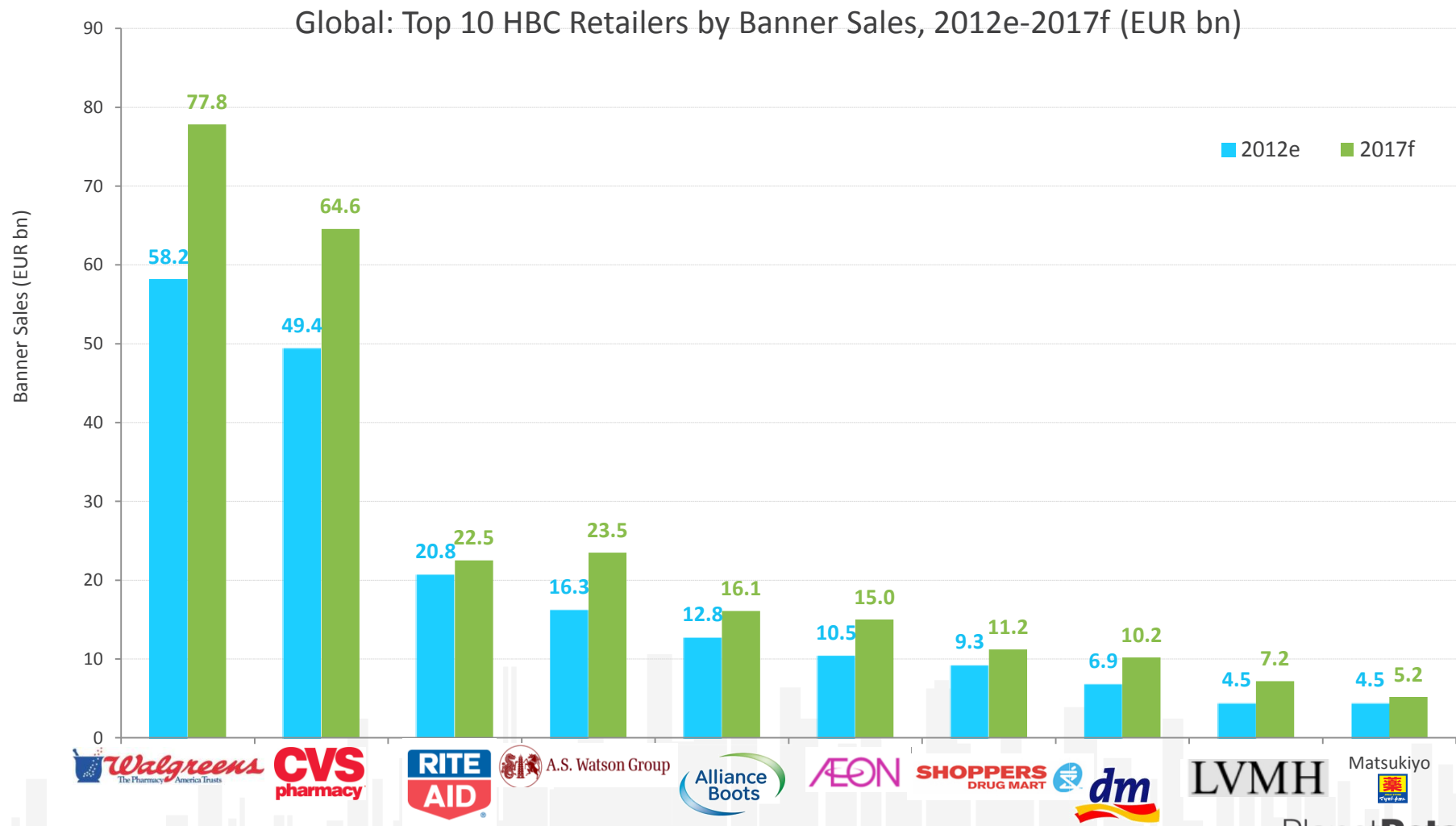
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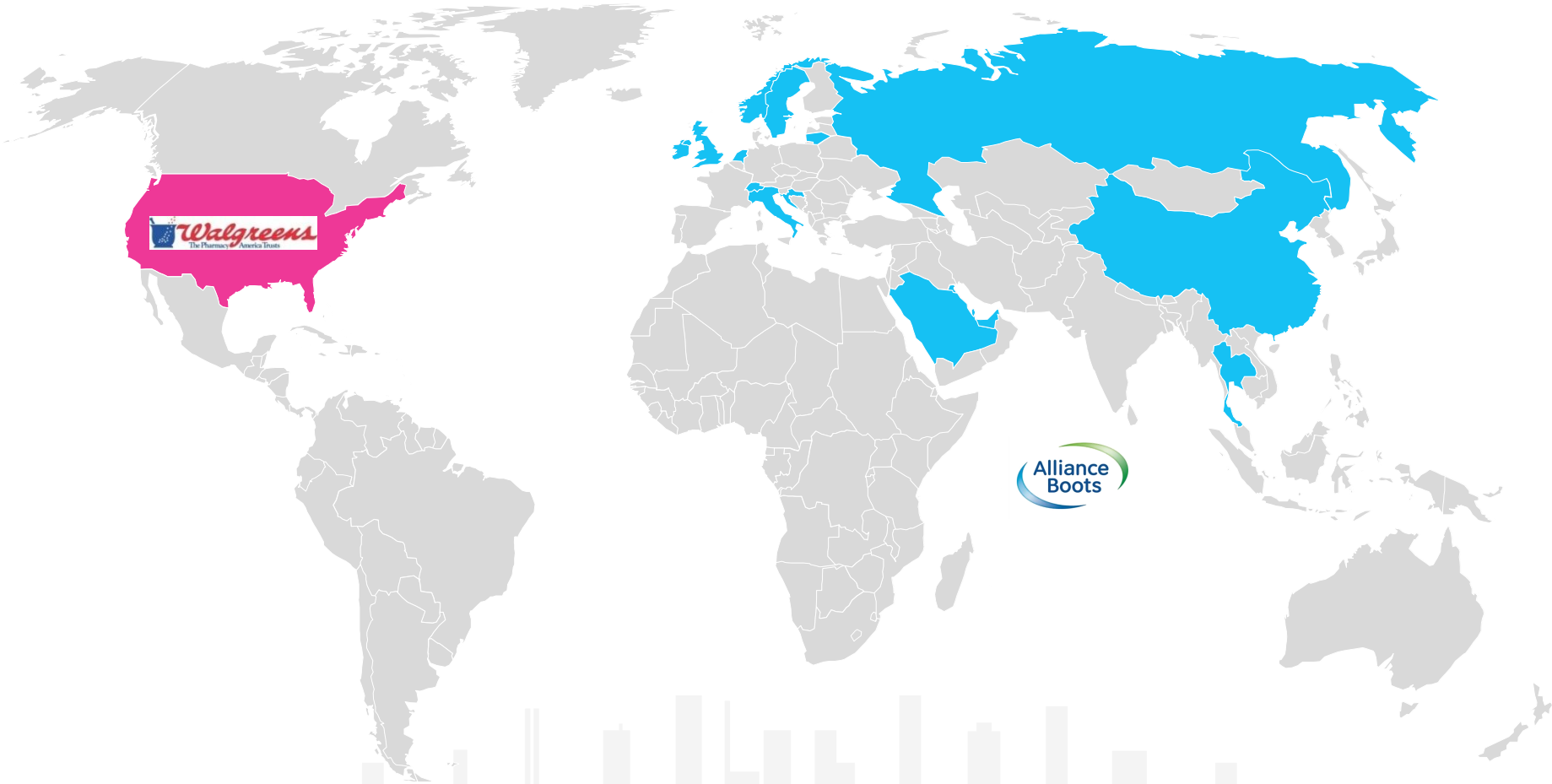
# Overview



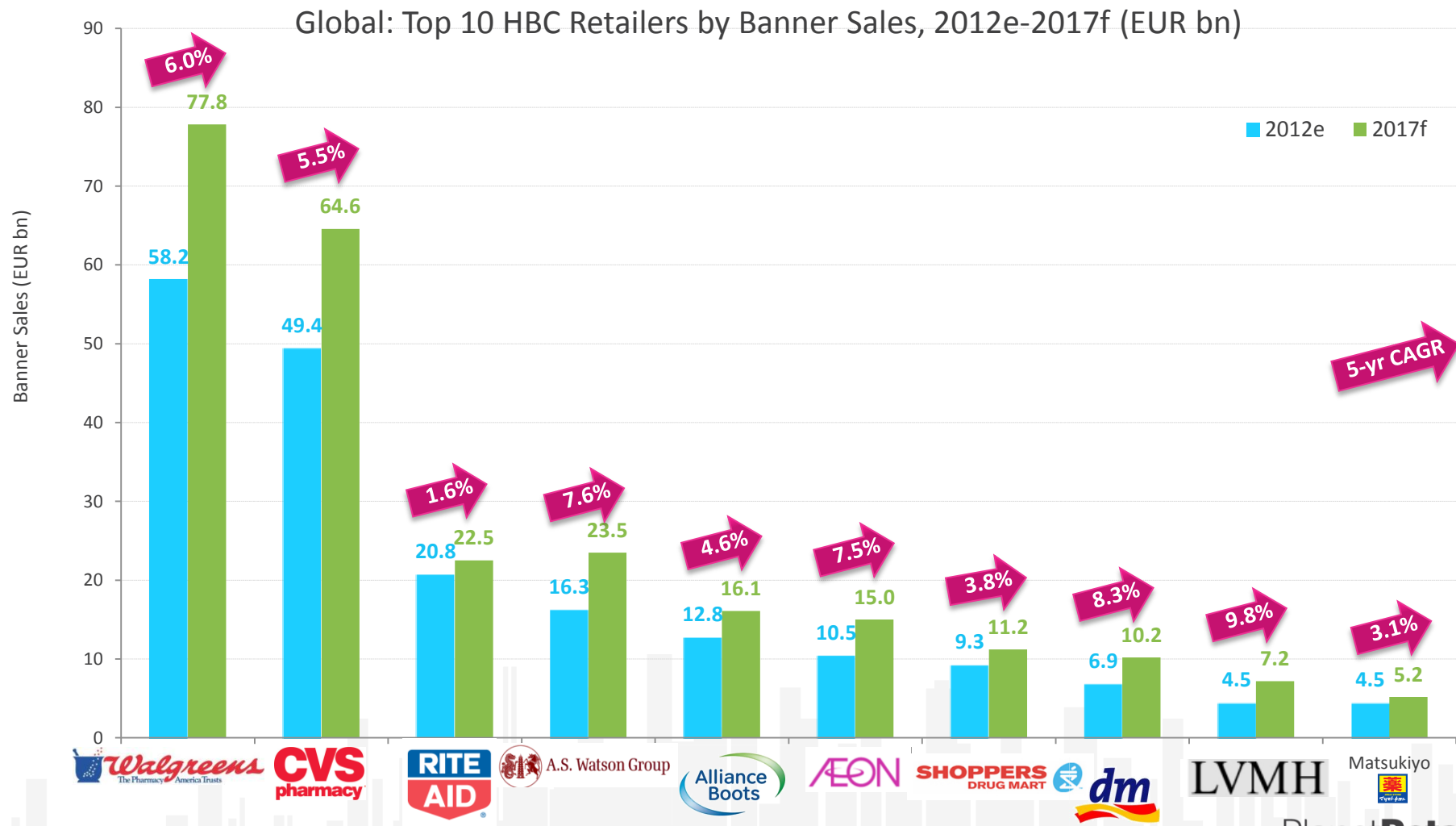
Leading US players will continue to dominate global rankings in 2017.



The Walgreens Alliance Boots Deal will significantly expand Walgreens' geographical reach.



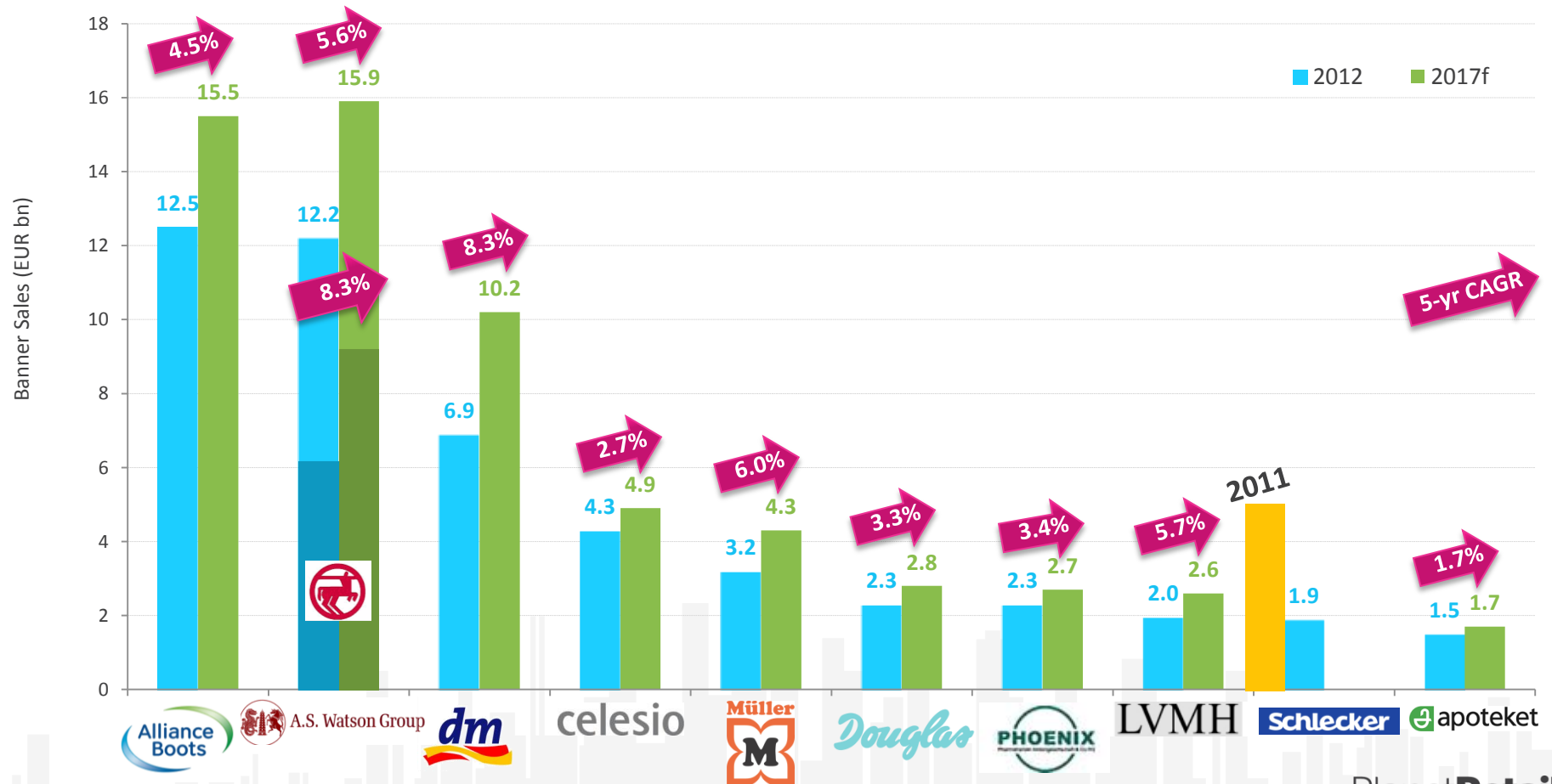
Leading US players will continue to dominate global rankings in 2017.





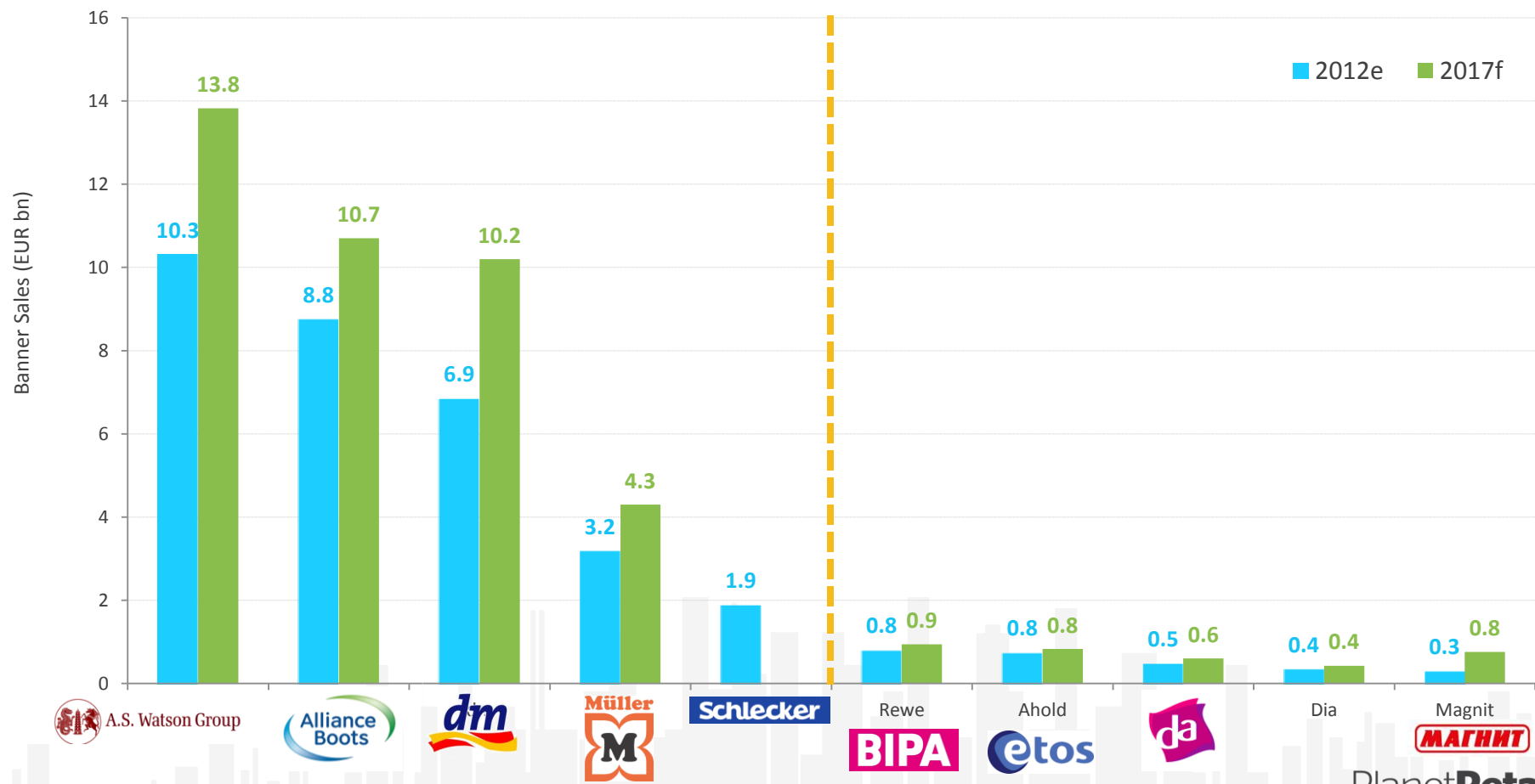
Several European HBC players have benefited from Schlecker's downfall.

Europe: Top 10 HBC Retailers by Banner Sales, 2012e-2017f (EUR bn)

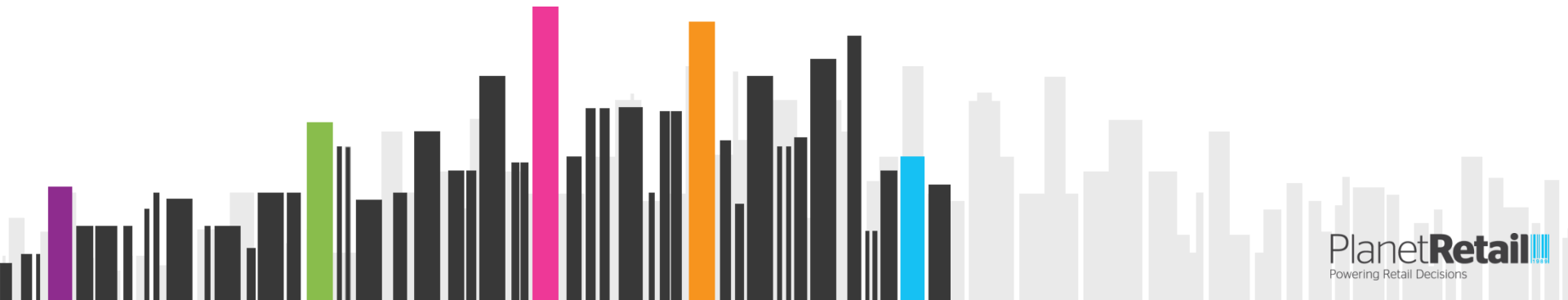


The European drugstore channel is increasingly getting consolidated with four major players stepping out.

Europe: Top 10 Drugstore Operators by Banner Sales, 2012e-2017f (EUR bn)

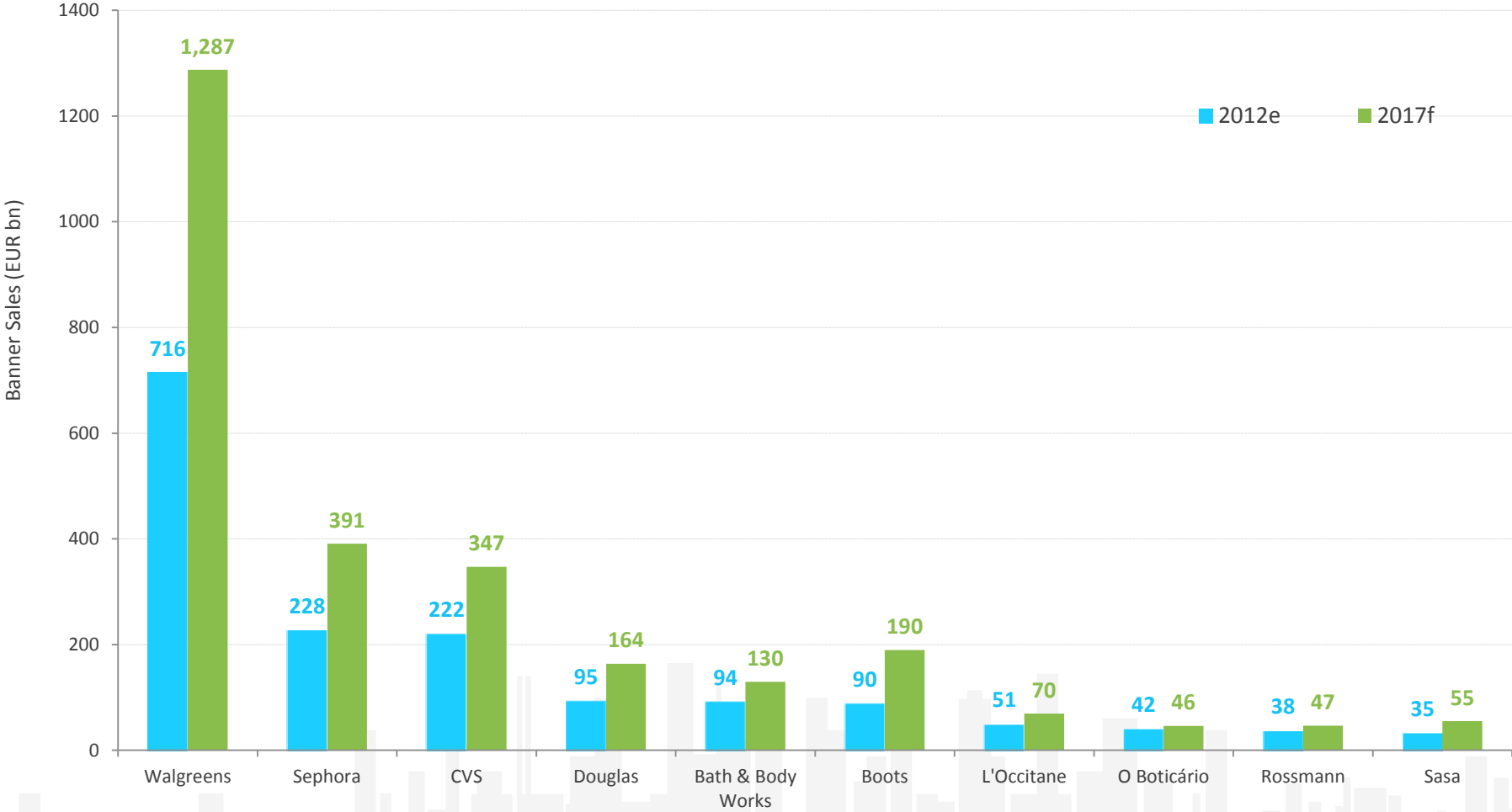


# E-Commerce



Walgreens has stepped up its activity in e-commerce over the last year and now it is a leader among its peers in this fast growing area.

Global: Top 10 HBC E-commerce Retailers by Banner Sales, 2012e-2017f (EUR bn)





With a variety of brands/websites, Walgreens manages to have a strong presence across the whole health & beauty and pharmacy sector.

Walgreens' online shops, 2013

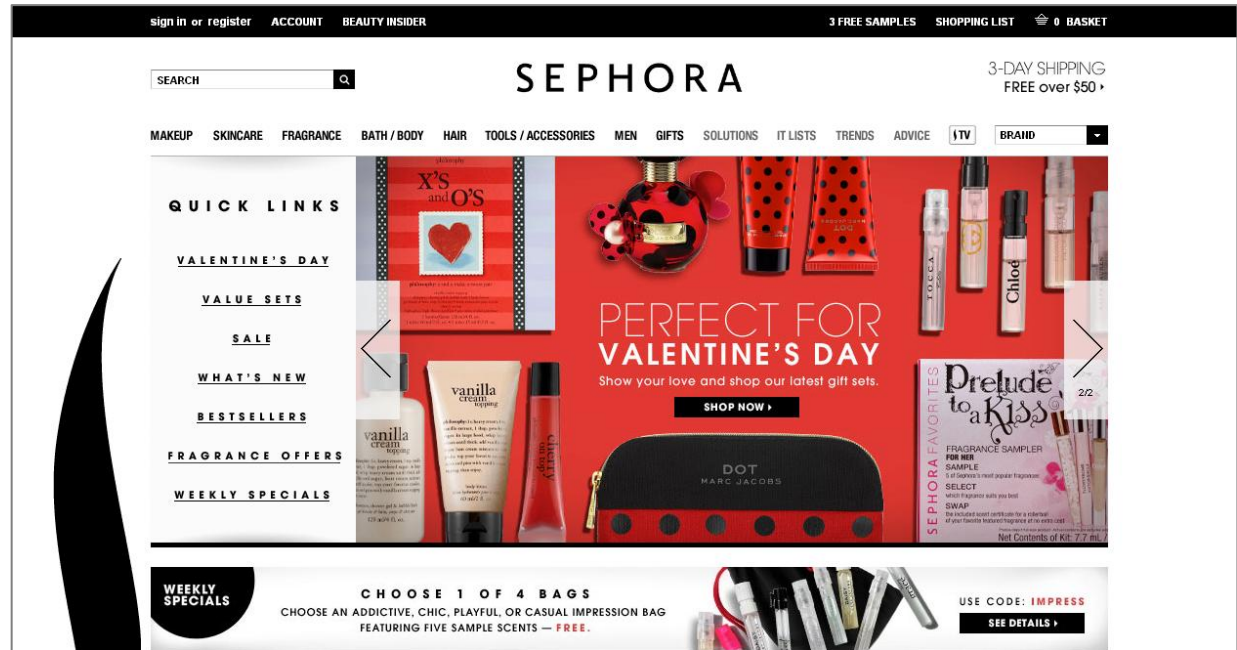
Online Shop	SKUs	Description
 the uncommon drugstore	86,569	Online provider of health, beauty, vision, and pharmacy products - acquired in 2011
 AT THE CORNER OF HAPPY & HEALTHY™	70,974	Online pharmacy providing refill prescriptions, flu shots and the ability to print photos.
	17,483	Offers skin care, hair care and makeup
 where science and beauty click®	11,191	Online beauty retailer worldwide, selling premium brands
 powered by drugstore.com™	657	Offers a simple way to order contact lenses

Source: Planet Retail



# LVMH's Sephora uses e-commerce to explore new markets.

- LVMH's Sephora extended sephora.com to Canada before it entered the market
- It acquired a 70% stake in Sack's before entering Brazil



Copyright: Sephora.com

Other beauty retailers are rather cautious when it comes to e-commerce.

- In August 2011, dm started selling its popular private labels via Amazon.de
- Amazon is the vendor and responsible for logistics and pricing.
- The Amazon warehouse is served just like any other store.



Alone among manufacturer brands: 'Brand Shops' within Amazon's drugstore category



Rossmann offers inflatable boats and camping equipment in its online shop.

Copyright: Amazon.de

Copyright: Rossmannversand.de

dm is able to do a low-cost trial and benefit from Amazon's expertise.

- Benefits:
  - ▶ Low-cost trial.
  - ▶ Drives volume.
  - ▶ The only cheaper alternative to a variety of manufacturer brands.
  - ▶ Increasing brand recognition.
  - ▶ Increased catchment area.



“Amazon is just like another store for us.”

**ERICH HARSCH**

CEO  
dm



dm is able to do a low-cost trial and benefit from Amazon's expertise.

- Concerns:
  - ▶ Officially serving as a wholesaler, hence no control over Amazon's pricing (due to European legislation on RPM).
  - ▶ Cannibalisation with brick & mortar stores.
  - ▶ No impulse buying.

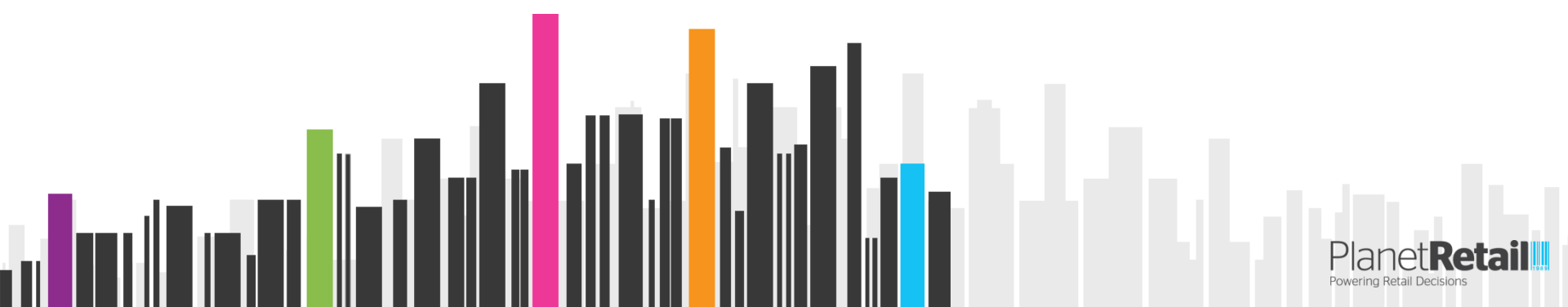


"Amazon is just like another store for us."

**ERICH HARSCH**

CEO  
dm

# Private Label Trends





HBC remains a category that is very sensitive regarding private labels.

Newsletter Startseite ALDI International Inhalt

**Hofer** schneller einkaufen spart Zeit und Geld. Und Geld.

Aktuelle Angebote Sortiment Infos und Service Unternehmen Karriere Filialstandorte

Sie sind hier: [Startseite](#) → [Sortiment](#) → [Neu im Sortiment](#) → Anti-Schuppen Shampoo

**Neu im Sortiment**

[Zur Produktübersicht](#)

Höchste Qualität zu niedrigsten Preisen!

Anti-Schuppen

**Anti-Schuppen Shampoo**

per Flasche **5,69** (1,90/100 ml)

HEAD & SHOULDERS

Produkt 2/31

- Per E-Mail empfehlen
- In Einkaufsliste legen
- Einkaufsliste ansehen
- Seite drucken

**GARNIER Fructis sampon** többféle 250 ml/flakon

699 Ft helyett **599 Ft** /flakon -14% (299 Ft)

**GARNIER Fructis balszam** többféle 200 ml/flakon

699 Ft helyett **599 Ft** /flakon -14% (299 Ft)

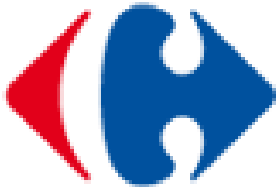
2012.09.13 - 09.19. csütörtöktől szombatig

ALDI

FSC®-tanúsítvánnyal rendelkező papírra nyomtatva.

MIX Fehérje-konzisztencia-kiegészítő FSC® C043918

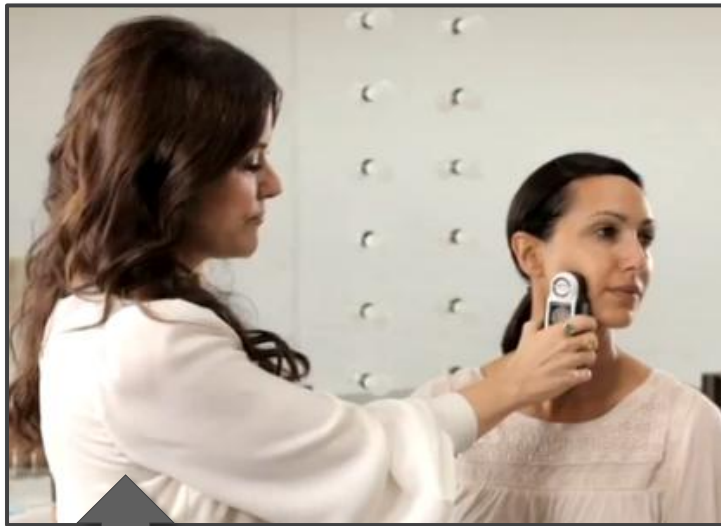
Pictures - Copyright: Aldi Süd



Private labels have not disappeared from retailers' shelves – however, shoppers might not notice them.



# Pioneer and best practice: Alliance Boots' No7



Copyright: Alliance Boots

No7's latest innovation: Match Made.



In Boots' drugstores, No7 products have a large presence and fill many shelves.

**Alliance Boots aims to make its No7 range a USD1 billion brand by 2015 (up from USD315 million in 2011).**



No7 is known in countries in which Boots does not even operate a single outlet!

"We want to go global with skin care and we will use all opportunities that we can find."



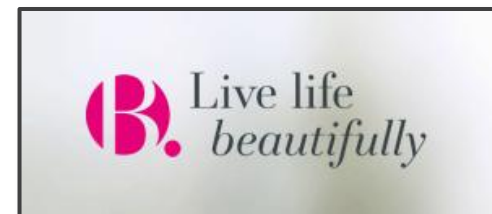
Copyright: Alliance Boots

STEFANO PESSINA  
CEO  
Alliance Boots



Finally, Superdrug follows the trend of its fiercest competitor launching venture brand B.

- Standalone website
- No evidence it has been developed by Superdrug
- Trained experts in stores
- If successful, export to overseas retail businesses



Copyright: Superdrug





Retailer names disappear from private label products.

Economy

Standard

Premium

Added value



Introduced in November 2012



Launched in August 2011



Rolled out in August 2010



Added in November 2012



Retailer names disappear from private label products.

Economy

Standard

Added value



Launched in February 2011



Relaunched in January 2013



Relaunched in Autumn 2012



Introduced in January 2013

But not from all products...



Copyright: Walgreens

# Social Media & Beauty Blogs




Everybody is talking about social media – it's inevitable! But...



Would you  a tampon?

Reasons you'll ♥ o.b.® tampons ...

If the pure existence of a product or retailer is not enough to “like” it the relevance and value of the social media presence has to be extended!




**The o.b. Brand**  
4.583 „Gefällt mir“-Angaben · 156 sprechen darüber

Gesundheit/Schönheit  
Designed by a female gynecologist, o.b.® tampons provide custom-fit protection that gives women the freedom to pursue their passions.

Info

DESIGNED FOR MORE CONTROL, more comfort.

LESS WASTE

 **4.583**

58 Green Tips

Lose the Applicator

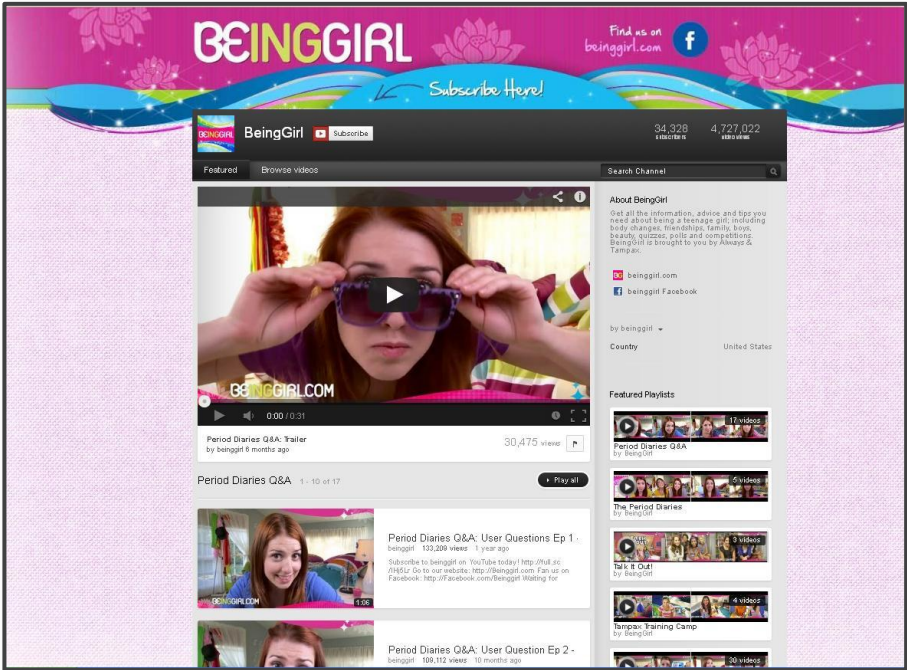
Fotos

„Gefällt mir“-Angaben

58 Tips

Lose the Applicator

In sensitive categories becoming a trusted advisor especially helps to target younger customers.



Copyright: Nosotras

Copyright: beinggirl

Generally spoken, retailers and manufacturers need to lose their faceless, impersonal image.

**Emma Benwell** @itsEMmagical 16h  
 Painting and redecorating sounds like it could be fun. It's not. And it's taking forever.

**The Body Shop UK** @TheBodyShopUK  
 @itsEMmagical Think how lovely your newly painted home will be! As a gift, we'd love to send you a fragrance oil & burner :- ) #TBSGiveJoy  
 ← Hide conversation

7:48 PM - 12 Apr 12 via web · Details  
 ← Reply ↻ Retweet ★ Favorite


**Mirka Moore** @Kahanka 21h  
 what a horrible day today, started with blue skies, now pouring down with rain....

**The Body Shop UK** @TheBodyShopUK  
 @Kahanka it really has been miserable! Would you like a shower gel from our new Earth Lovers range? A gift to cheer up your day #TBSGiveJoy  
 ← Hide conversation

**Duane Reade** hat einen Link geteilt.  
 vor 18 Stunden

It's National Grilled cheese day today- tell us what are your favorite condiments to add to your grilled cheese- tomatoes, avocado? And most importantly do you use Swiss or American cheese? <http://eatocracy.cnn.com/2012/04/12/national-grilled-cheese-day/>

Übersetzung anzeigen



**National grilled cheese day**  
 eatocracy.cnn.com

While you're frying up some eggs and bacon, we're cooking up something else: a way to celebrate today's food holiday. Hot off the press: April 12 is National Grilled Cheese Day! Whether you call it a

Gefällt mir · Kommentieren · Teilen

17 Personen gefällt das.

**Jann Dougherty** Love love love Duane Reade!  
 vor 17 Stunden · Gefällt mir · 1

**Duane Reade** Jann Dougherty we love you right back!  
 vor 16 Stunden · Gefällt mir · 1

They could borrow faces from employees for a personal touch...





**Boots UK**

Diese Seite gefällt mir · 23. August 2012

✕

Gefällt mir · Kommentieren · Teilen

👍 268 Personen gefällt das.

🗨️ 3 mal geteilt

💬 Vorherige Kommentare anzeigen 6 von 61

**Robvn White Andrew** It's on Amazon for £28. free

Schreibe einen Kommentar ...



...or make use of already existing, free and honest feedback of countless beauty blogs (and vlogs).

**Beauté BLOG**

Accueil Nouveau : Le Live ! Blogs à voir À propos de moi Contact Forum Presse

Rechercher

jeudi 24 janvier 2013

**Le Post Parité #14 : Blue Motherfuckin' Lagoon**

*Cette semaine, Seb est allé se faire masser. Et pas n'importe où. Le veinar.*

En Islande il y a deux trucs cool à faire. Compter le nombre de consonnes qu'il y a dans chaque mot OU aller se détendre à Blue Lagoon.

Comme je ne sais pas lire, j'ai été me détendre.

Dernière Vidéo

Comment faire un ombré nails avec les

**Le blog de Laura**

Accueil Blogroll Communauté et contact

LUNDI 21 JANVIER 2013

Glossybox Hautes Résolutions, avec un peu de retard...

*Glossybox Hautes Résolutions*

GET A FREE GIFT!  
WHEN YOU PURCHASE \$30 OR MORE

SHOP NOW!

*Le Blog Beauté d'Emé.*

Accueil Présentation Retrouvez-moi aussi sur Ma wish-list Liens Me contacter

08/09/12

**Déménagement du blog !**

Celles qui me suivent sur ma page facebook Nos Trucs et Astuces de Filles avec Emé savent qu'un grand changement est prévu sur le blog.

Et oui, j'ai décidé de quitter Blogspot pour rejoindre Wordpress et par la même occasion, avoir mon propre domaine.

Emé Afficher mon profil complet

QUI CHERCHE, TROUVE :)

Rechercher

Make-up

*beautyblog*

Mes tendances fantaisistes...

Accueil Qui Suis-je? Look Make up LookBook Dû Je Shop Vide-Dressing Je lis Voyages

...or make use of already existing, free and honest feedback of countless beauty blogs (and vlogs).

 **Lidl France**  
4 January

Testées et approuvées par les mamans blogueuses, les nouvelles couches "Toujours" ont également fait l'unanimité auprès des bébés grâce à leur finesse et au système innovant Drylock. Normal, ne méritent-ils pas le meilleur ?

See translation



**ultra fine + fiable**

**ultra absorbante**

**ultra propre + sèche**

**douce + confortable**

Companies can go even further and use these trusted bloggers as brand ambassadors.

Beauty bloggers can become the "face" of a faceless company

Jess Zaino  
[www.cheapchicshoppingtours.com](http://www.cheapchicshoppingtours.com)

**Show Us Some Leg Facebook Contest**

DuaneReadeTV · 13 videos

507 views

Like  54

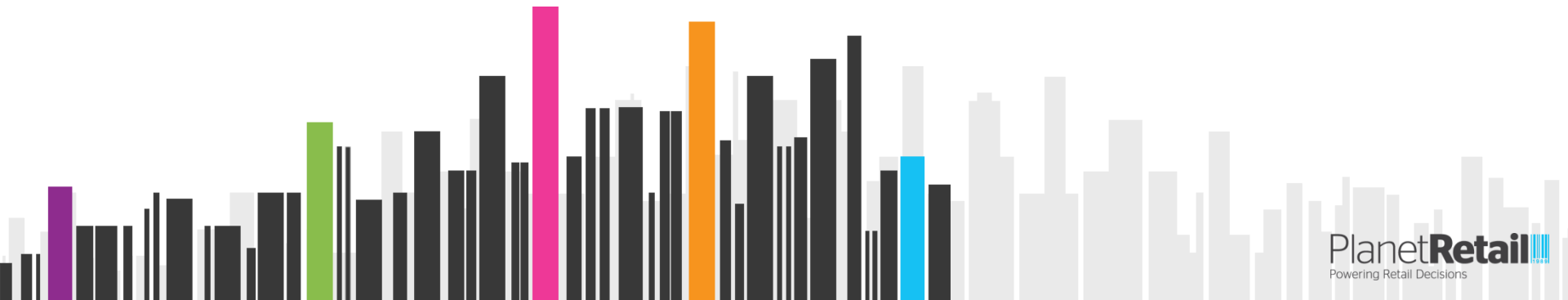
About Share Add to

Published on 18 Nov 2012

Enter the "Show Us Some Leg" contest by submitting original photos of yourself or a family member wearing Duane Reade™ brand hosiery!



# Summary



## Implications

- The Walgreens Alliance Boots Deal will significantly expand Walgreens' geographical reach.
- In HBC, the trend leads away from retailers names on private labels. The biggest players only put them on core products to be perceived as experts.
- If the pure existence of a product or retailer is not enough to “like” it the relevance and value of the social media presence has to be extended!
- On social media, retailers and manufacturers need to lose their faceless, impersonal image.

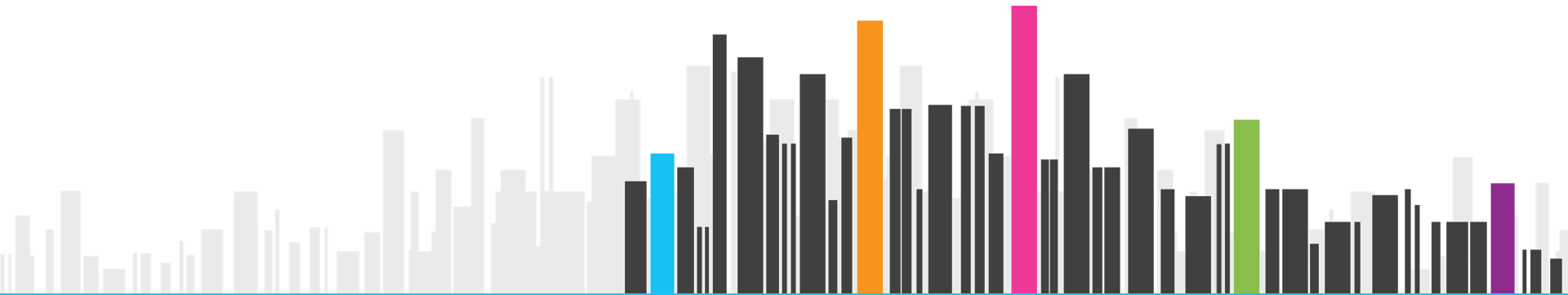
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