

Grocery Retail Structure 2014

CONVENIENCE

Co-operative Societies	Stores		Change Y-O-Y
	2013	2014	
The Co-operative Group	1,783	1,785	0.1%
Midcounties	175	177	1.1%
Southern	155	178	14.8%
Scotmid	153	161	5.2%
Central England	122	142	16.4%
East of England	79	81	2.5%
Lincolnshire	62	62	0.0%
Chelmsford Star	34	34	0.0%
Heart of England	21	22	4.8%
Tamworth	14	13	-7.1%
Other Co-operative Societies	39	25	-35.9%
TOTAL	2,637	2,680	1.6%

Convenience Multiples	Stores		Change Y-O-Y
	2013	2014	
Tesco	1,978	2,195	11.0%
Tesco Express	1,337	1,463	9.4%
One Stop	641	732	14.2%
McColl's (McColl's Retail Group)	664	719	8.3%
Sainsbury's Local	498	585	17.5%
M&S Simply Food	84	84	0.0%
Checkers Express (Sandpiper CI)	22	22	0.0%
Whistlestop (SSP)	22	21	-4.5%
Jones Convenience Stores (JCS)	17	15	-11.8%
Morrisons M Local	14	105	650.0%
Little Waitrose	11	15	36.4%
Other Convenience Multiples	10	10	0.0%
TOTAL	3,320	3,771	13.6%

Symbols	Stores		Change Y-O-Y
	2013	2014	
Premier (Booker)	2,802	2,950	5.3%
Premier	2137	2200	2.9%
Premier Express	665	750	12.8%
Best-one / Best-in (Bestway)	2,624	2,904	10.7%
Costcutter Supermarkets Group	1,704	2,547	49.5%
Mace, SuperShop, Your Store (Palmer & Harvey)	820	0	-
Spar UK	2,414	2,312	-4.2%
Musgrave Retail Partners GB	2,265	2,296	1.4%
Londis	1980	2018	1.9%
Budgens	93	104	11.8%
Centra	59	52	-11.9%
Mace (Northern Ireland only)	133	122	-8.3%
Lifestyle Express (Landmark Wholesale)	1,985	1,976	-0.5%
Nisa	970	1,002	3.3%
Nisa	913	916	0.3%
Loco	57	86	50.9%
Today's	377	408	8.2%
Day Today	233	241	3.4%
Today's	144	167	16.0%
Thorougds/Select (Bargain Booze)	174	157	-9.8%
Thorougds	20	19	-5.0%
Select Convenience	154	138	-10.4%
Key Store/Key Store Express (JW Filshill)	158	167	5.7%
Key Store	135	139	3.0%
Key Store Express	23	28	21.7%
WHSmith	115	115	0.0%
Welcome Break	35	35	0.0%
Moto	53	53	0.0%
Roadchef	27	27	0.0%
Select & Save	90	120	33.3%
VG/Vivo / Vivo Essentials (Hendersons)	79	81	2.5%
Simply Fresh	42	45	7.1%
TOTAL	16,619	17,080	2.8%

AFFILIATED MULTIPLES (included above)			
Blakemore Retail (Spar)	319	320	0.3%
CJ Lang & Sons (Spar)	114	117	2.6%
G&E Murgatroyd (Spar)	90	98	8.9%
Costcutter	89	89	0.0%
Henderson Retail (Spar)	70	76	8.6%
Alfred Jones (Warrington) (Spar)	69	27	-60.9%
Gillett's Callington (Spar)	60	63	5.0%
Amigo Shop (Compass UK)	44	42	-4.5%
Lawrence Hunt & Co (Spar)	27	27	0.0%
GT Retail (Spar)	18	16	-11.1%
Hunnyhill Stores (Spar)	13	13	0.0%
Pickwicks	14	15	7.1%
McBride Retail	10	10	0.0%
Others Affiliated Multiples	120	120	0.0%
Total	1,057	1,033	-2.3%

Independents			
UNAFFILIATED INDEPENDENTS	18,826	18,630	-1.0%
GRAND TOTAL	41,402	42,161	1.8%

FORECOURTS

Multiples Retailers	Store numbers		Change Y-O-Y
	2013	2014	
Tesco	517	518	0.2%
Tesco (attached)	497	498	0.2%
Tesco (standalone)	20	20	0.0%
Morrisons	314	328	4.5%
Sainsbury's	283	291	2.8%
Asda	217	226	4.1%
The Co-operative Group	216	197	-8.8%
The Co-operative Group (attached)	13	13	0.0%
The Co-operative Group (standalone)	203	184	-9.4%
Waitrose	16	16	0.0%
Waitrose (attached)	14	14	0.0%
Waitrose (standalone)	2	2	0.0%
TOTAL	1,563	1,576	0.8%

Oil Company Owned Multiples			
Shell	803	789	-1.7%
Esso	537	487	-9.3%
BP	314	322	2.5%
Murco	232	231	-0.4%
Maxol	30	30	0.0%
Gulf		10	
TOTAL	1,916	1,869	-2.5%

Dealer Multiple			
MRH (GB)	377	381	1.1%
Rontec/Snax 24	148	208	40.5%
Euro Garages	120	179	49.2%
Motor Fuel Group	58	60	3.4%
Park Garage Group	58	55	-5.2%
Petrogas Group	23	42	82.6%
Spring Petroleum Group	25	29	16.0%
MPK Garages	25	28	12.0%
HKS Retail	27	27	0.0%
Brobot Group Limited	23	23	0.0%
Synergie Holdings	23	23	0.0%
Penny Petroleum incorporating Topspot Services	18	20	11.1%
Cornwall Garage Group	16	16	0.0%
Platinum Retail	10	14	40.0%
Thames Petroleum (Scotland)	14	14	0.0%
Hills of Corby Hill / Hills of Lakeland	13	13	0.0%
Krisco Scyon Group	10	13	30.0%
The Kay Group	11	13	18.2%
Manor Service Stations	12	12	0.0%
Sewell Retail	12	12	0.0%
The Brookfield Group	15	12	-20.0%
Valli Forecourts	12	12	0.0%
AY&Y Patel Dewsbury	11	11	0.0%
M & L Richardson & Sons	11	11	0.0%
Roadside Group Holdings	11	11	0.0%
The Carsley Group	12	11	-8.3%
Golden Cross Group	10	10	0.0%
Highway Stops Retail	0	10	-
KSC Worldwide Ltd	10	10	0.0%
Majid & Sons Service Stations / U&I Fuels	10	10	0.0%
Refuel & Go	10	10	0.0%
SK Fuel	0	10	-
Other Dealer Independents (inc. smaller multiples)	3,743	3,831	2.4%
TOTAL	4,878	5,141	5.4%

JOINT VENTURES (included above and left)			
Costcutter Supermarkets Group	267	745	179.0%
Spar	643	658	2.3%
Londis	350	320	-8.6%
Tesco Express/Esso	198	198	0.0%
M&S Simply Food/BP Connect	153	175	14.4%
Premier (Booker)	90	102	13.3%
Budgens	24	37	54.2%
Mace	335	0	-100.0%
Other Joint Ventures	50	50	0.0%
TOTAL	2,110	2,285	8.3%

GRAND TOTAL	8,357	8,586	2.7%
--------------------	-------	-------	------

NOTES
Source: IGD/William Reed Business Media. Variations in data: totals for 2013 are based on historical data, and year-on-year variations are sometimes due to changing data sources, acquisitions and structural changes where retailers have moved into new sectors (eg from frozen food specialists to supermarkets). Names where a company uses a fascia other than its own name, the fascia is given, with the parent company in brackets. Symbols: While most symbol stores are owned by independent retailers, for the sake of consistency, the supplying wholesaler has been identified for symbol stores with additional brands or formats itemised below. Multiples: must have at least 10 stores. Convenience Retailers: must be under 280sq m/3,000sq ft in size and stock at least seven of the following product categories: alcohol, bakery, chilled, confectionery, fast food/FG, frozen, fruit/veg, health & beauty, household/non-food, lottery, milk, newspapers/mags, packaged groceries, snacks, soft drinks, tobacco. Independents: must not belong to a symbol or franchise group and must not display a wholesaler fascia. Forecourt Convenience Retailers: must be convenience retailers as per definition above. Joint ventures and partnerships are joint sites and have been subtracted from the total. Traditional & Specialist Grocery Retailers: CTNs are defined as having a confectionery, tobacco and newspaper sales base. Specialist grocers must have a strong grocery sales base. Off-licences have a BWS sales base. Food specialists include butchers, bakers, greengrocers, health foods and specialist confectioners. Supermarkets, Superstores and Hypermarkets: Supermarkets must be above 280sq m/3,000sq ft in size, and stock a wide range of general food and grocery categories. Superstores must be over 2,250sq m/25,000sq ft. The definition of a Hypermarket has been amended this year to include only outlets that are at least 5,400 sq m/60,000 sq ft in size.

TOP 10

Multi-Format Estates	C-Stores	standalone	attached	joint ventures	Supermarkets	Superstores	Hypermarkets	CTN	Store numbers		Change Y-O-Y
									2013	2014	
Tesco	2,195	20	498	175	191	483	242	-	2,905	3,131	7.8%
Premier (Booker)	2,950	-	-	50	-	-	-	-	2,802	2,950	5.3%
The Co-operative Group	1,785	184	13	-	806	0	-	-	2,814	2,775	-1.4%
Costcutter Group	2,547	-	-	198	-	-	-	-	1,704	2,547	49.5%
Musgrave GB	2,296	-	-	320	129	-	-	-	2,398	2,425	1.1%
Spar UK	2,312	-	-	745	40	-	-	-	2,440	2,352	-3.6%
McColl's Retail Group	719	-	-	-	-	-	555	-	1,265	1,274	0.7%
Sainsbury's	585	-	291	-	248	304	70	-	1,109	1,207	8.8%
Morrisons	105	-	328	-	250	266	0	-	504	621	23.2%
Marks & Spencer	84	0	314	102	492	1	1	-	565	577	2.1%
TOTALS	13,540	581	1,324	1,335	2,245	1,355	373	555	17,504	18,094	3.4%

SUPERMARKETS

Co-operatives	2013		2014		Change Y-O-Y
	SUPERMARKETS	SUPERSTORES	SUPERMARKETS	SUPERSTORES	
The Co-operative Group	827	806	1	0	-2.7%
Central England	89	102	3	3	14.1%
Midcounties	67	63	-	-	-6.0%
East of England	54	52	-	-	-3.7%
Lincolnshire	18	18	-	-	0.0%
Scotmid	36	36	-	-	0.0%
Southern	13	11	-	-	-15.4%
Heart of England	14	15	-	-	7.1%
Channel Islands	13	13	-	-	0.0%
Other Co-ops	6	6	-	-	0.0%
TOTAL	1,137	1,122	4	3	-1%

Multiples	2013		2014		Change Y-O-Y				
	SUPERMARKETS	SUPERSTORES	SUPERMARKETS	SUPERSTORES					
Tesco	192	191	480	235	242	907	916	1.0%	
Iceland Frozen Food	786	830	-	-	-	786	830	5.6%	
Sainsbury's	245	248	301	304	65	70	611	622	1.8%
Lidl	600	600	-	-	-	600	600	0.0%	
Asda	190	189	311	319	32	32	533	540	1.3%
Poundland	430	520	-	-	-	430	520	20.9%	
Aldi	477	518	-	-	-	477	518	8.6%	
Morrisons	230	250	260	266	-	490	516	5.3%	
Marks & Spencer	479	492	2	1	-	481	493	2.5%	
Poundstretcher	400	400	-	-	-	400	400	0.0%	
B&M Retail	324	330	29	42	-	353	372	5.4%	
Wilkinson	308	299	64	73	-	372	372	0.0%	
Farmfoods	320	323	-	-	-	320	323	0.9%	
TJ Morris	282	322	-	-	-	282	322	14.2%	
Waitrose	240	251	47	54	1	288	306	6.3%	
Heron Foods	240	240	-	-	-	240	240	0.0%	
99p Stores	200	217	-	-	-	200	217	8.5%	
Frozen Value	102	101	-	-	-	102	101	-1.0%	
J&J Wilson	70	71	-	-	-	70	71	1.4%	
Cook	33	67	-	-</					