Grocery Retail Structure 2013

Co. operative Societies	Store n	Store numbers				
Co-operative Societies	2012	2013	Y-O-Y			
The Co-operative Group	1,753	1,783	1.7 %			
Midcounties	163	175	7.4%			
Southern	139	155	11.5%			
Scotmid	152	153	0.7%			
Midlands	117	122	4.3%			
East of England	78	79	1.3%			
Lincolnshire	55	62	12.7 %			
Chelmsford Star	32	34	6.3%			
Heart of England	20	21	5.0 %			
Tamworth	14	14	0.0%			
Other Co-operative Societies	39	39	0.0%			
ΤΟΤΑΙ	2 562	2 637	2 93%			

Convenience Multiples			
Tesco	1,834	1,978	7.9 %
Tesco Express	1,217	1,337	9.9%
One Stop	617	641	3.9%
Martin McColl/Rs McColl	606	664	9.6%
Sainsbury's Local	415	498	20.0%
M&S Simply Food	76	82	7.9 %
Checkers Express (Sandpiper CI)	23	22	-4.3%
Whistlestop (SSP)	21	22	4.8%
Jones Convenience Stores (JCS)	17	17	0.0%
Morrisons	0	14	
Waitrose	11	11	0.0%
Other Convenience Multiples	24	10	-58.3%
TOTAL	3,027	3,318	9.61%

Symbols			
Booker (Premier)	2,700	2,802	3.8%
Premier	2144	2137	-0.3%
Premier Express	556	665	19.6%
Bestway (Best-one / Best-in)	2,511	2,624	4.5%
Spar UK	2,427	2,414	-0.5%
Musgrave Retail Partners GB	2,188	2,265	3.5%
Londis	1910	1980	3.7%
Budgens	83	93	12.0%
Centra	59	59	0.0%
Mace (Northern Ireland only)	136	133	-2.2%
Landmark (Lifestyle / Lifestyle Express / Scandia)	2,198	2,200	0.1%
Costcutter	1,620	1,704	5.2 %
Nisa	844	970	14.9 %
Nisa	840	913	8.7%
Loco	4	57	1325.0%
Palmer & Harvey (Mace, Supershop, Your Store, Key Store)	892	875	-1.9 %
Today's	337	377	11.9 %
Day Today	210	233	11.0%
Today's	127	144	13.4%
Bargain Booze	184	174	-5.4%
Thorougoods	28	20	-28.6%
Select Convenience	156	154	-1.3%
JW Filshill	160	158	-1.3%
Key Store	136	135	-0.7%
Key Store Express	24	23	-4.2%
WHSmith	115	115	0.0%
Welcome Break	35	35	0.0%
Moto	53	53	0.0%
Roadchef	27	27	0.0%
Select & Save	85	90	5.9 %
Vivo / Vivo Essentials (Northern Ireland)	83	79	-4.8 %
Simply Fresh	27	42	55.6 %
TOTAL	16,371	16,889	3.16%

Affiliated Multiples (included above)

Total	1,069	1,057	-1.1%
Other Affiliated Multiples	120	120	0.0%
McBride Retail	10	10	0.0%
Pickwicks	12	14	16.7%
Hunnyhill Stores (Spar)	13	13	0.0%
GT Retail (Spar)	18	18	0.0%
Lawrence Hunt & Co (Spar)	28	27	-3.6%
Amigo Shop (Compass UK)	49	44	-10.2%
Gilletts Callington (Spar)	57	60	5.3%
Alfred Jones (Warrington) (Spar)	76	69	-9.2%
Henderson Retail (Spar)	79	70	-11.4%
Costcutter	89	89	0.0%
G&E Murgatroyd (Spar)	82	90	9.8%
CJ Lang & Sons (Spar)	108	114	5.6%
Blakemore Retail (Spar)	328	319	-

Unaffiliated Independents TOTAL 19,237 18,826 -2.1% **GRAND TOT** ,<mark>670 1.1</mark>%

TAL	41,197 4	1

Multiples	Store n	umbers	Change
Multiples	2012	2013	Y-O-Y
Attached			
Tesco	492	497	1.0%
Morrisons	301	314	4.3%
Sainsbury's	265	283	6.8%
Asda	195	217	11.3%
Waitrose	14	14	0.0%
Со-ор	13	13	0.0%
TOTAL	1,280	1,338	4.5%
Multiples Standalone			
The Co-operative Group	202	203	0.5%
M&S Simply Food/BP Connect	142	160	12.7 %
Tesco	217	218	0.5%
Tesco Express/Esso	198	198	0.0%
Tesco - standalone	19	20	5.3%
Waitrose	1	2	100.0%
TOTAL	222	225	1.4%
Oil Company Owned Multiples			
Esso	581	537	-7.6 %
Shell	843	803	-4.7 %
BP	306	314	2.6%
Murco	189	232	22.8%
Maxol	28	30	7.1%
TOTAL	1.947	1.916	-1.6%

Dealer Multiple

MRH (GB)	325	377	16.0 %
Rontec Watford	234	148	-36.8 %
Euro Garages	70	120	71.4%
Park Garage Group	96	58	-39.6%
Motor Fuel Group	58	58	0.0%
Snax 24	58	53	-8.6%
HKS Retail	25	27	8.0%
MPK Garages	40	25	-37.5%
Spring Petroleum	30	25	-16.7 %
Synergie Holdings (formerly Aleef Garages)	23	23	0.0%
Brobot Petroleum	23	23	0.0%
Petrogas	23	23	0.0%
Alfred Jones (Warrington)	19	18	-5.3%
Penny Petroleum	18	18	0.0%
Cornwall Garage Group	16	16	0.0%
Brookfield Group	15	15	0.0%
Thames Petroleum (Scotland) Ltd	9	14	55.6%
Hills of Corby Hill	13	13	0.0%
Sewell Retail	12	12	0.0%
Valli Forecourts	17	12	-29.4%
The Carsley Group	12	12	0.0%
Manor Service Stations	12	12	0.0%
M & L Richardson	15	11	-26.7%
AY&Y Patel	11	11	0.0%
The Kay Group	11	11	0.0%
Roadside Group	10	11	10.0%
Majid & Sons Service Station/U&I Fuels	10	10	0.0%
Krisco Scyon Group	10	10	0.0%
Golden Cross Group	10	10	0.0%
Refuel & Go (formerly Sectorsure)	10	10	0.0%
Platinum Retail Ltd	0	10	
KSC Worldwide Ltd	9	10	11.1 %
Other Dealer Independents	3908	3,958	1.3%
TOTAL	5,152	5,164	0.2%
JOINT VENTURES (included above and	left)		
Spar	637	643	0.9%
Londis	326	350	7.4%
Mace	355	335	-5.6%
Costcutter	267	267	0.0%
Tesco Express/Esso	198	198	0.0%
M&S Simply Food/BP Connect	142	160	12.7%

88 36 50

90 2.3% 24 -33.3% 50 0.0%

2,099 2,117 0.9%

8,601 8,643 0.5%

TOP 10

Multi-Format Estates	C-Stores	Forecourts standalone	Forecourts attached	Forecourts joint ventures	Supermarkets	Superstores	Hypermarkets	Store N 2012	l umbers 2013	Change YOY
Tesco	1,978	218	497	0	192	480	235	2,938	3,103	5.6 %
The Co-operative Group	1,783	203	13	0	827	1	0	2,801	2,814	0.5%
Booker (Premier)	2,802	0	0	90	0	0	0	2,700	2,802	3.8%
Spar UK	2,414	0	0	643	26	0	0	2,460	2,440	-0.8%
Musgrave Retail Partners GB	2,265	0	0	335	133	0	0	2,327	2,398	3.1%
Costcutter	1,704	0	0	267	0	0	0	1,620	1,704	5.2 %
Sainsbury's	498	0	283	0	245	301	65	1,013	1,109	9.5%
Marks & Spencer	82	160	0	0	423	21	0	654	686	4.9 %
Asda	0	0	217	0	190	271	72	518	533	2.9 %
Morrisons	14	0	314	0	209	281	1	473	505	6.8%
Totals	13,540	581	1,324	1,335	2,245	1,355	373	17,504	18,094	3.4%

	2012 SUBEDMARKETS		2012			HYPERMARKETS 2013	Store n	umbers	Change
Co-operatives	2012	2013	2012	2013	2012	2013	2012	2013	Y-O-Y
The Co-operative Group		827	1	1	0	0	846	828	-2.1 %
Midlands	76	72	3	3	0	0	79	75	-5.1%
Midcounties	67	67	0	0	0	0	67	67	0.0%
Midcounties	57	57	0	0	0	0	57	57	0.0%
Tuffins	10	10	0	0	0	0	10	10	0.0%
East of England	54	54	0	0	0	0	54	54	0.0%
Lincolnshire	18	18	0	0	0	0	18	18	0.0%
Scotmid	38	36	0	0	0	0	38	36	-5.3%
Anglia	14	17	0	0	0	0	14	17	21.4 %
Southern	14	13	0	0	0	0	14	13	-7.1 %
Heart of England	13	14	0	0	0	0	13	14	7.7%
Channel Islands	13	13	0	0	0	0	13	13	0.0%
Other Co-operatives	6	6	0	0	0	0	6	6	0.0%
TOTAL	1,158	1,137	4	4	0	0	1,162	1,141	-1.8%

Tesco	190	192	470	480	227	235	887	907	2.3%
Iceland Frozen Food	812	786	0	0	0	0	812	786	-3.29
Lidl	590	600	0	0	0	0	590	600	1.7%
Sainsbury's	242	245	299	301	57	65	598	611	2.2%
Marks & Spencer	416	423	20	21	0	0	436	444	1.8%
M&S Food Halls	300	298	20	21	0	0	320	319	-0.39
M&S Simply Food	116	125	0	0	0	0	116	125	7.8%
Morrisons	207	209	266	281	0	1	473	491	3.8%
Aldi	406	477	0	0	0	0	406	477	17.5%
Asda	184	190	265	271	69	72	518	533	2.9%
Wilkinson	304	308	63	64	0	0	367	372	1.4%
Poundland	392	430	0	0	0	0	392	430	9.7%
Poundstretcher	387	400	0	0	0	0	387	400	3.4%
Farmfoods	320	320	0	0	0	0	320	320	0.09
Waitrose	232	240	44	47	1	1	277	288	4.0%
B&M Retail	193	324	0	0	0	0	193	324	67.9
Home Bargains (TJ Morris)	248	282	0	0	0	0	248	282	13.79
Heron Foods	180	240	0	0	0	0	180	240	33.3
99p Stores	175	200	0	0	0	0	175	200	14.39
Jack Fulton (Frozen Value)	88	102	0	0	0	0	88	102	15.9%
J&J Wilson	55	70	0	0	0	0	55	70	27.39
Cook	49	33	0	0	0	0	49	33	-32.7
Booths	27	28	0	0	0	0	27	28	3.7%
CK's Supermakets	20	20	0	0	0	0	20	20	0.09
Filco Supermarkets	10	11	0	0	0	0	10	11	10.0
Other Multiples	50	50	10	10	12	12	72	72	0.09
TOTAL		6,180	1,437	1,475	366	386	7,580	8,041	6.1%

independent G	GII	EI	aı	U	00	.CI	2		
Budgens	102	97	0	0	0	0	102	97	-4.9%
Eurospar	33	26	0	0	0	0	33	26	-21.29
Supervalu	37	36	0	0	0	0	37	36	-2.7%
Other independent grocers	37	37	1	1	0	0	38	38	0.0%
TOTAL	209	196	1	1	0	0	210	197	-6.2%
TOTAL	209	196	1	1	0	0	210	197	-6.2%

NOTES

Booker (Premier) Budgens Other Joint Ventures TOTAL

GRAND TOTAL

NOTES Source: IGD/William Reed Business Media. Variations in data: totals for 2012 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/cg from frozen food specialists to supermarkets). Names: where a company uses a fascia other than its own name, the fascials given, withit heparent 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 are owned by mitolegendent retailers, for the sake of consistency, the supplying wholesaler has been identified for symbol stores with additional brands or formast lemised below. Multiples: must have at least 105 stores. Convenience Retailers: must be under 280s gm/3,000s ft in size and stock at least seven of the following product categories: aicohol, bakery, chilled, confectionery, fast food/FTG, 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 jointsites and have been subtracted from thetotal. Traditional& Specialist Grocery Retailers: CIN's are defined as having a confectionery, tobacco and newspaper sales bases. Specialist grocers must have a strong grocery sales base. Off-licences arejointsites and have been subtracted from the total. Iraditional & Specialist Grocery Netailers: L. HS are defined as having a confectionery, tobacco and newspaper sales base. Specialist grocers must have a strong grocery sales base. Of 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 280sg m/3,000sg (th in size, and stock a wide range of general food and grocery categories. Superstores must be over 2,250sg m/2,500sg (th. The definition of a Hypermarket has been amended this year to include only outlets that are at least 5,400 sg m/60,000 sg (th in size.

Specialist CTNs	Store n	umbers	Change
Specialist CTNs	2012	2013	Y-O-Y
Martin McColl	653	601	-8.0 %
Rippleglen	117	124	6.0%
Supercigs/Supernews	53	63	18.9%
Mercury News/Evening Telegraph/Evening Post	36	32	-11.1%
Arden News/Candies/York Smokers	28	12	-57.1%
Maynews	20	17	-15.0%
GT News	46	44	-4.3%
Aleef News	26	20	-23.1%
Finlays Newsagents	21	20	-4.8%
Newsplus Group	20	20	0.0%
Other CTNs	2,413	2,347	-2.7%
TOTAL	3,296	3,176	-3.6%

Specialist Off-licences Bargain Booze	487	466	-4.3%
Bargain Booze	40/ 231	400 254	-4.3% 10.0%
	201		
Bargain Booze Plus	256	212	-17.2%
Majestic Wine Warehouse	176	193	9.7%
Oddbins	35	35	0.0%
EFB Retail (Whittalls Wines/Booze Buster/Simply Drinks)	130	88	-32.3%
Rhythm & Booze/BigIn Booze (Bibby)	68	68	0.0%
Winemark	77	76	-1.3%
Spirited Wines/Nicolas	62	47	-24.2%
G101 Off Sales	47	44	-6.4%
Wineflair - Mace	34	41	20.6%
Hartleys/The Offie (previously M&O Trading)	22	30	36.4%
Wine Rack	21	19	-9.5%
The Whisky Shop	18	21	16.7 %
Kellys Wines/Discount Booze	25	25	0.0%
Adnams Cellar & Kitchen	12	11	-8.3%
Laithwaites	11	12	9.1%
Other off-licences	2,386	2,359	-1.1%
TOTAL	3,611	3,535	-2.1%
Specialist Bakers			
Greggs (incl. Bakers Oven)	1,571	1,671	6.4%

Greggs (incl. Bakers Oven)	1,571	1,671	6.4 %
Sayers the Bakers (Bolton)	153	161	5.2%
Coopland & Son (Scarborough)	126	146	15.9 %
Cooplands (Doncaster)	85	85	0.0%
West Cornwall Pasty Co	75	76	1.3%
Patisserie Holdings	88	98	11.4 %
Greenhalgh's	60	62	3.3%
WT Warren & Son (Warrens)	58	51	-12.1%
Birds (Derby)	54	55	1.9 %
Other Bakers	4,842	5,084	5.0 %
TOTAL	7,173	7,489	4.4%

Other Specialists

Butchers			
Butchers	6,540	6,501	-0.6 %
TOTAL	6,540	6,501	-0.6%
Farm Shops			
Farm Shops	3,300	3,356	1.7%
TOTAL	3,300	3,356	1.7%
Green Grocers			
Greengrocers	1,772	1,765	-0.4 %
TOTAL	1,772	1,765	-0.4 %
Fishmongers			
Fishmongers	990	988	-0.2%
TOTAL	990	988	-0.2%
Health Food Shops			
Holland & Barrett	742	797	7.4%
Holland & Barrett	650	700	7.7%
Nature's Way	50	55	10.0%
GNC	42	42	0.0%
Other health food shops	78	78	0.0%
TOTAL	1,031	875	-15.1%
Chocolatier/Confectioner			
Thorntons	591	506	-14.4 %
Owned	364	314	-13.7%
Franchised	227	192	-15.4%
Hotel Chocolat	63	69	9.5%
Mr Simms Olde Sweet Shoppe	70	76	8.6 %
Other Chocolatiers/Confectioners	103	110	6.8 %
TOTAL	827	761	-8.0 %
Other Food Specialists			
Whittard	73	59	-19.2%
Willitidiu			
Other Food Specialists	3,201	3,189	-0.4%
·······			-0.4% -0.8%
Other Food Specialists	3,201	3,189	
Other Food Specialists	3,201	3,189	
Other Food Specialists TOTAL	3,201 3,274	3,189 3,248	-0.8%
Other Food Specialists TOTAL	3,201 3,274	3,189 3,248	-0.8%

GRAND TOTAL

31,814 31,694 -0.4%

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