

Grocery Retail Structure 2013

CONVENIENCE

Co-operative Societies	Store numbers 2012	Store numbers 2013	Change 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%
TOTAL	2,562	2,637	2.93%

Convenience Multiples	Store numbers 2012	Store numbers 2013	Change Y-O-Y
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	Store numbers 2012	Store numbers 2013	Change Y-O-Y
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)	Store numbers 2012	Store numbers 2013	Change Y-O-Y
Blakemore Retail (Spar)	328	319	-
CJ Lang & Sons (Spar)	108	114	5.6%
G&E Murgatroyd (Spar)	82	90	9.8%
Costcutter	89	89	0.0%
Henderson Retail (Spar)	79	70	-11.4%
Alfred Jones (Warrington) (Spar)	76	69	-9.2%
Gilletts Callington (Spar)	57	60	5.3%
Amigo Shop (Compass UK)	49	44	-10.2%
Lawrence Hunt & Co (Spar)	28	27	-3.6%
GT Retail (Spar)	18	18	0.0%
Hunnyhill Stores (Spar)	13	13	0.0%
Pickwicks	12	14	16.7%
McBride Retail	10	10	0.0%
Other Affiliated Multiples	120	120	0.0%
Total	1,069	1,057	-1.1%

Unaffiliated Independents	Store numbers 2012	Store numbers 2013	Change Y-O-Y
TOTAL	19,237	18,826	-2.1%
GRAND TOTAL	41,197	41,670	1.1%

FORECOURTS

Multiples	Store numbers 2012	Store numbers 2013	Change Y-O-Y
Attached	492	497	1.0%
Tesco	301	314	4.3%
Morrisons	265	283	6.8%
Sainsbury's	195	217	11.3%
Asda	14	14	0.0%
Waitrose	13	13	0.0%
Co-op	1,280	1,338	4.5%
Multiples Standalone	202	203	0.5%
The Co-operative Group	142	160	12.7%
M&S Simply Food/BP Connect	217	218	0.5%
Tesco	198	198	0.0%
Tesco Express/Esso	19	20	5.3%
Tesco - standalone	1	2	100.0%
Waitrose	222	225	1.4%
TOTAL	222	225	1.4%
Oil Company Owned Multiples	581	537	-7.6%
Esso	843	803	-4.7%
Shell	306	314	2.6%
BP	189	232	22.8%
Murco	28	30	7.1%
Maxol	1,947	1,916	-1.6%
TOTAL	1,947	1,916	-1.6%

Dealer Multiple	Store numbers 2012	Store numbers 2013	Change Y-O-Y
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	3,908	3,958	1.3%
TOTAL	5,152	5,164	0.2%

JOINT VENTURES (included above and left)	Store numbers 2012	Store numbers 2013	Change Y-O-Y
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%
Booker (Premier)	88	90	2.3%
Budgens	36	24	-33.3%
Other Joint Ventures	50	50	0.0%
TOTAL	2,099	2,117	0.9%

GRAND TOTAL	8,601	8,643	0.5%
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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 (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 listed below. Multiples: must have at least 10 stores. Convenience Retailers: must be under 280sqm/3,000sq ft in size and stock at least seven of the following product categories: alcohol, 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 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 over 280sqm/3,000sq ft in size, and stock a wide range of general food and grocery categories. Superstores must be over 2,250sqm/25,000sq ft. The definition of a Hypermarket has been amended this year to include only outlets that are at least 5,400sqm/60,000sq ft in size.

TOP 10

Multi-Format Estates	C-Stores	Forecourts standalone	Forecourts attached	Forecourts joint ventures	Supermarkets	Superstores	Hypermarkets	Store Numbers 2012	Store Numbers 2013	Change Y-O-Y
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	263	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	1,235	2,245	1,355	373	17,504	18,094	3.4%

SUPERMARKETS

Co-operatives	2012	2013	2012	2013	2012	2013	2012	2013	Store numbers 2012	Store numbers 2013	Change Y-O-Y
The Co-operative Group	845	827	1	1	0	0	0	0	846	828	-2.1%
Midlands	76	72	3	3	0	0	0	0	79	75	-5.1%
Midcounties	67	67	0	0	0	0	0	0	67	67	0.0%
Tuffins	57	57	0	0	0	0	0	0	57	57	0.0%
East of England	54	54	0	0	0	0	0	0	54	54	0.0%
Lincolnshire	18	18	0	0	0	0	0	0	18	18	0.0%
Scotmid	38	36	0	0	0	0	0	0	38	36	-5.3%
Anglia	14	17	0	0	0	0	0	0	14	17	21.4%
Southern	14	13	0	0	0	0	0	0	14	13	-7.1%
Heart of England	13	14	0	0	0	0	0	0	13	14	7.7%
Channel Islands	13	13	0	0	0	0	0	0	13	13	0.0%
Other Co-operatives	6	6	0	0	0	0	0	0	6	6	0.0%
TOTAL	1,158	1,137	4	4	0	0	0	0	1,162	1,141	-1.8%

Multiples	Store numbers 2012	Store numbers 2013	Change Y-O-Y
Tesco	190	192	2.3%
Iceland Frozen Food	812	786	-3.2%
Lidl	590	600	1.7%
Sainsbury's	242	245	2.2%
Marks & Spencer	416	423	1.8%
M&S Food Halls	300	298	-0.3%
M&S Simply Food	116	125	7.8%
Morrisons	207	209	3.8%
Aldi	406	477	17.5%
Asda	184	190	2.9%
Wilkinson	304		