SUPERMARKET & RETAILER
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Household cleaning & sanitisation

Jeanne-Riëtte Martins writes of the trends and insights of keeping it clean in 2021. In South Africa, the leaning products market had an estimated value of R20 billion in 2019, with the largest segment being laundry care. The Covid-19 pandemic saw many consumers allocating more of their budget to cleaning products.

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Jaime van Aswegen says that dynamite comes in small packages when she shows us the revamp of the Norwood Spar.

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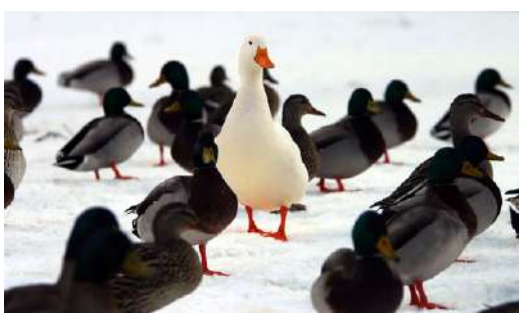
Delight your customers



Aki Kalliatakis quotes the American idiom, "Dance with the one who brung you!" In other words, how can you expect your customers to be loyal if you are not visibly loyal to them?

NEWS

BMi research

Covid-19 pandemic has resulted in shifts in consumer demand for dairy products, as well as changed consumer purchase habits.

NielsenIQ research

A new report on the true cost of liquor bans of South Africa's liquor bans, including verified data up to end Q1, 2021 and insights and analysis of 'Where to from here?' for the local sector.

Retail excellence – an ever moving target

Jane Sarah Rosen's dad was a member of a retail team that visited Disney World when she was eight years old. Its objective was to instil a set of core values into these trainees and managers that would, in turn, re-energise the very values that drove the in-store retail shopping experience for staff and customers alike.

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The year round season of Back-to-School

Helen Maister

In any normal year retailers would be starting the back-to-school planning and buying, getting ready for the year to come. Traditionally there would be a great influx of consumer spend in December and January for the upcoming school year.

This has changed suddenly in the past year. Consumers have had to take over their dining room tables or had to find nooks in their homes to work and study from. The home office has seen a new dawn. Companies have afforded employees a stipend for stationery and office supplies. Schools no longer have to print out reams of material for their students. It is all done at home.

The stationery industry is starting to boom with cute themes and pretty prints. There is a great drive to individuate and sooth the monotony of being at home constantly. The other side of the scale is good quality and at a good price, as the majority of South Africans are extremely price sensitive. Year round consumers are buying stationery as the need arises.

Long-term, the cleaning products market is always expanding and is undoubtedly one of the biggest markets, both nationally and globally.

Cleaning products are a necessity and any industry with such great demand fosters a large and competitive market. The basic need to keep one's home clean and hygienic on a regular basis means that consumers will always purchase at least a basic range. There are specific trends driving growth in the category, such as the increase in urbanisation, better standards of living, product innovation and accessibility of surface cleaning products.

A report by Mordor Intelligence finds that the leading cleaning product brands in South Africa have benefited from their extensive distribution networks across sales channels, with e-commerce having 'cleaned up' since 2020, in the light of Covid-19 and its effects on purchasing.

In this month's Store Watch we cover my personal favourite Spar – Spar Norwood. Everything you wish to purchase in one small store. I don't think I have ever gone to Spar Norwood, looking for some obscure product and come out empty handed. We also take a look at an Italian hypermarket in a lower income area.

The Covid-19 pandemic has resulted both in shifts in consumer demand for dairy products as well as changed consumer purchase habits with fewer customers' in-store and consumers favouring garage forecourts given their convenience.

As a result, garage forecourts have adjusted their product mix to ensure a more balanced offering between immediate consumption and future consumption pack alternatives.

BMi Research reveals that the local dairy market weathered these shifts in dairy products relatively well. The biggest winner in these consumer shifts was the buttermilk and maas category which recorded volume growth in 2020 compared to 2019.

Helen Maister

Helen Maister

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Who brung you to the party?

How can you expect your customers to be loyal if you are not visibly loyal to them?

Aki Kalliatakis
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In this series of Supermarket & Retailer's articles, we share stories of what some organisations and managers have done to motivate and inspire their teams. We give you practical ideas of what you can do to create the most amazing, customer-driven company in the world.

There's a wonderful American idiom that goes "Dance with the one who brung you!" If you know American culture, you'll know that it means that if someone invited you to a party, you should stick with them, not leave them alone, and certainly not go and hang out with others.

> "There is an unwritten rule in society that you have an obligation to stay loyal to someone who has been loyal to you from the beginning."

You probably agree with it when it comes to your friends and family in your personal life, but it all seems to fall apart in business. But it shouldn't be that way.

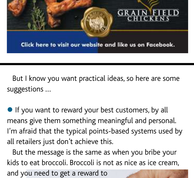
I've said it before, and I'll say it again: how can you expect your customers to be loyal if you are not visibly loyal to them?

In compiling the content for my latest book, I brainstormed at least 156 ways to add value for your customers to capture their hearts (and their wallets), but the most astounding fact was that most of these ideas and innovations are free, or cost a minimal amount.

For example, my friend Taki, who own a business that manufactures and distributes biltong (for overseas readers, that's what is called 'jerky'), one small act of including a toothpick in the package – worth just a few cents – made all the difference. Just a silly little toothpick to clean your teeth. (Of course, one of SA's biggest retailers picked up this idea and immediately imitated it.)

So what can you do to create a business or a brand that your customers love? What will create positive feelings about you? What will make them say "I know this is good for me"?

Most of us in business don't produce spectacular rock concerts, nor do we run theme parks or 5-star hotels.



But I know you want practical ideas, so here are some suggestions …

- If you want to reward your best customers, by all means give them something meaningful and personal. I'm afraid that the typical points-based systems used by all retailers just don't achieve this.

  But the message is the same as when you bribe your kids to eat broccoli. Broccoli is not as nice as ice cream, and you need to get a reward to eat it. But when the parents stop rewarding them, kids stop eating it.

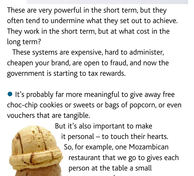
> "Whether it's with kids, adults, employees or customers, we tend to default to carrot and stick – rewards or punishments …"

These are very powerful in the short term, but they often tend to undermine what they set out to achieve. They work in the short term, but at what cost in the long term?

These systems are expensive, hard to administer, cheapen your brand, are open to fraud, and now the government is starting to tax rewards.

- It's probably far more meaningful to give away free choc-chip cookies or sweets or bags of popcorn, or even vouchers that are tangible.

  But it's also important to make it personal – to touch their hearts. So, for example, one Mozambican restaurant that we go to gives each person at the table a small paper cone of peanuts.



> An ice-cream shop in Umhlanga always adds a small scoop of another flavour on top of your cone.

- Honour your customers, and make them feel important. As a minimum, recognise them when they walk in. Even if you just say "Nice to see you again." In 99% of cases you will be right! Introduce them to others. Ask them their opinion on a new product or a new display. Even scribble handwritten little thank you notes for them and randomly put them in their shopping bags.

- Use the power of positive emotions – it's so simple to make them laugh a bit with a corny joke, or by wearing something totally ridiculous, or even bringing in a magician. You can do quizzes, and lucky draws, and strange contests, and live music from your local high school band – or your staff doing a talent show. You can even bring in an out of work cartoonist or artist to draw their caricatures, or a mime. We are dying of boredom, and a little bit of kindness goes such a long way. You don't even have to be a humour creator – you can be a humour curator. So start collecting the things that make you laugh and spread the joy. Humour is a secret weapon in business – and in life!

- People also love secrets and mysteries. Secrets create social currency, especially if they are remarkable and make people feel special and unique. You can include secret venues, secret guests, secret information, secret events, secret sales and previews, secret 'behind the scenes' tours. You can also reveal mysteries slowly, like a cliff-hanger in a TV series. Secret special service (like Chef's Table) or 'hidden menus' – for example, when you send them a secret note about where to find something that other customers cannot access – are all a lot of fun. Those that are 'in the know' love it and it makes them feel like insiders, which also creates communities or 'tribes.' And the dirty little secret about secrets? They tend not to stay secret very long!

- Nostalgia and tapping into older customers' memories is a great strategy – and a lovely loyalty spinner. I read once that nostalgia is the vice of the aged – and it's true! Remind customers of something positive in the past.

Just do something – anything – that adds value.

For example, we all wanted to be a 'rebel' when we were younger and even old music brings back memories. I saw this at Pensioners Day at a butchery chain, and loved it. All five senses can be used – a certain smell immediately took me back decades. You could even send your customers notes and photos about positive events from their past – like what your store looked like when it first opened.

These are just a handful of ideas and, if you'd like, tell us if you want to hear more. The point is, just do something – anything – that adds value.

And don't just run off with someone else and ignore those who brung you.

Aki Kalliatakis is the managing partner of The Leadership Launchpad, a company dedicated to helping clients become more customer driven. He can be contacted at (011) 640 3958, or via the website at www.leadershiplaunchpad.co.za

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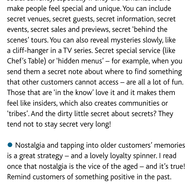

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The write stuff

The stationery and office supplies category is vast. Incorporating locally manufactured ranges, budget options imported from China and Korea, luxury imports from Europe and North America, and everything in between, it's an exciting market.

Ann Baker-Keulemans

In 2020, the Covid-19 lockdown was instrumental in driving the work-from-home trend and forced home schooling on a vast number of under-prepared families. There was a mad scramble for stationery, arts and crafts products, and office supplies. And then the world settled into what is fast becoming the new normal. Home-office set ups are taking shape while remote learning finds its feet. In addition, digitisation has shifted stationery and office supply requirements. Stationery needs are clearly changing, but to what extent does this affect the retail space?

Who is your target market?
Retailers should still be stocking stationery items and office supplies, albeit targeted for their catchment area and customer base of schools, universities, residential homes and complexes, office parks, large corporates, industrial and business areas, and small traders selling onto the end consumer. The secret is to understand the needs of each customer segment, to maintain and adjust the range and stock levels accordingly.

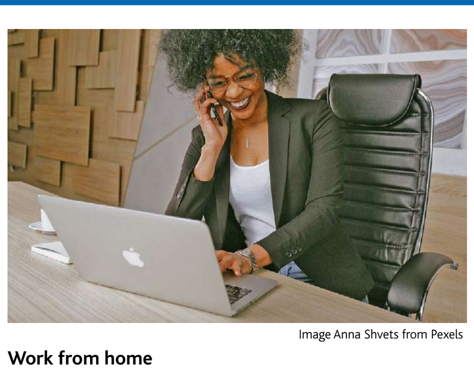

Image Anna Shvets from Pexels

Work from home
The Covid pandemic has forced a revision of the traditional office-based model. Many businesses have discovered that their employees are equally productive, and sometimes even more so, when based at home. Remote working is a far more sustainable practice than previously thought, and even for companies that might prefer their employees to be on-site, continued safety concerns mean that a full migration back to the office is unlikely to happen soon.

It is for this reason that global and local businesses, including Shopify and Twitter, are providing their remote workforce with a stipend or reimbursements to cover at-home office supplies – and this covers everything from paper, pens, and printer ink, to desks, chairs, cushions, and laptop stands.

In some cases, an entire office set-up is required, particularly if the employee is going to continue working from home or is self-employed. In this case a full complement of stationery and office supplies is necessary – from cabinets and office furniture, files, and labelling, all the way through to mouse batteries, punches, and staplers. For those who have returned to the office, office supplies and stationery requirements may have also shifted as the company moves to more digitised or sustainable solutions.

The paperless office
Environmentally aware offices and individual consumers are driving the paperless office movement in an attempt to minimise their carbon footprint and produce less waste. In other cases, cost-cutting measures, efficiency initiatives, and technological innovations are encouraging paper-free workspaces.

For those who cannot go completely paperless, sustainable paper suppliers and recyclable materials are increasingly on-trend. This is offset by a growing middle class, a rising adult literacy rate, and an increasing number of consumers where price is the driving factor and the option of going paperless, or using sustainable supplies, is just too expensive.

The Protection of Personal Information Act (POPIA) has also affected the growth of the paperless office. For certain businesses, the repercussions of a data leak are so serious that no hard copies of data are permitted, and everything must be actioned, recorded, and stored online.

ADVERTORIAL

Back-to-School is bigger than ever

The global pandemic and subsequent lockdowns that followed were able to change the way schools, offices and workspaces operated. With many learners and professionals either opting to or being forced to work from home, a shift has been made to the digitization of the learning/work process and flow.

Aimed at building a lasting trade partnership, Freedom Stationery prioritises easy and convenient stock replenishment with extensive merchandising, point-of-sale and marketing support. 1m, 2m, 3m or 5m drops are available to suit your store, featuring fast-moving items with fantastic margins.

Despite this, there continues to be a demand in stationery and office supplies, especially in the build-up to back-to-school this year.

Learners attending online classes from home in particular, has resulted in an increased demand for equipment and supplies that would simulate the "in-class experience". Whilst stand-alone desks, monitors, chairs, keyboards, and classroom equipment have understandably enjoyed increased sales during the new normal. The industry has seen a high demand for the traditional office and stationery supplies. These range from basic paper products, writing instruments, school, home stationery to arts and craft supplies.

Marlin's extensive range of everyday stationery with an emphasis on providing "Real Good Value" by offering high quality products at competitive prices is perfectly positioned to meet this demand, with a host of supporting brands that are geared toward consumer needs.

This, in essence, means that the demand has not changed for the back-to-school season. If anything, it has increased, and retailers should work towards meeting this demand by stocking stationery items and office supplies, particularly product ranges that are geared more specifically to their market.

Marlin doesn't just provide the stock, but presents an entire offering that has been designed to serve as an end-to-end solution for every stationery department.

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Back to (home) school
Of the parents we spoke with, most agreed that their home-schooling stationery requirements were less than what they would have had to provide according to stationery lists provided by schools. In most cases, this was due to a reduction in loss – It's a lot harder for children to lose their stationery at home than it is for them to misplace it at school.

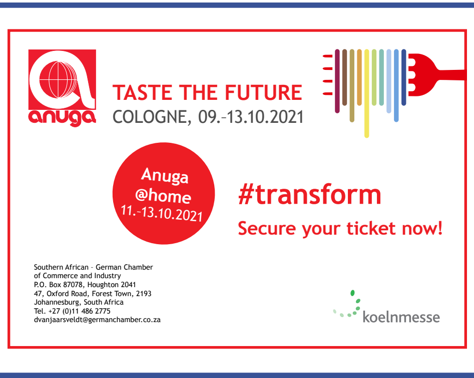
For many, school stationery lists are still the driving force behind their stationery purchases. Government schools have been sending work home via WhatsApp, and this requires students to have a full complement of school stationery at home.

That said, back to school needs vary wildly from age group to age group, and from rural to government to private school. This is where understanding your target market comes into play.

Digital transformation?
As a developing country, South Africa is behind in terms of equitable access to technology such as tablets, laptops, and personal PCs. Internet access is still out of reach for many rural learners, which means traditional stationery at affordable prices remains in demand. This demand is set to increase as government works to increase access to schooling for underprivileged and rural learners of all ages.

Private schools have been moving away from traditional paper notebooks and towards digital and online learning for some time now. Over the past year and a half, repeated school closures have seen a surge in online learning.

One teacher we spoke with commented that in the current situation, all the stationery she needs to do her job as a high school teacher is a red pen. Notes are sent digitally, classes are held online, and even tests are taken and marked online. Similarly, herstudents may choose to take notes by hand, but many prefer to use some form of technology to do so, making their stationery requirements negligible and based mainly on personal preference. Of course, this may change according to the lockdown situation, but the move towards digitisation is and will continue to march on.



Need versus want
Stationery is a strange beast – some people use the bare minimum, while others covet and collect. In our mini consumer survey, several consumers admitted to buying more stationery than they needed simply for the pleasure of it.

Higher-end pens and notebooks were cited as 'want' purchases rather than 'need' purchases, with parents and teachers alike claiming that girls tend to enjoy stationery more than boys.

Price is a driving factor for many, but for those who can afford it, quality can also be important, and a fair number of consumers are prepared to pay more for a higher quality product. This is as applicable for notebooks and pens as it is for bigger ticket items.

For the consumer whose business depends on it, a reliable printer with good after sales support is preferable to a cheap and chirpy machine.

For people forced to WFH, home office set-ups have become vital, and consumers are prepared to pay for comfort in the form of ergonomic chairs, height-adjustable desks, foot rests, and laptop stands.

The Covid effect
A potential blow to the stationery market was dealt by the pandemic in the form of earnings and job losses. For consumers on the bread line, feeding their families takes precedence over school fees and stationery lists. For those who have lost their jobs or been furloughed, the need for stationery at home is greatly diminished. But whether this will have a long-term effect on the market is still to be seen.

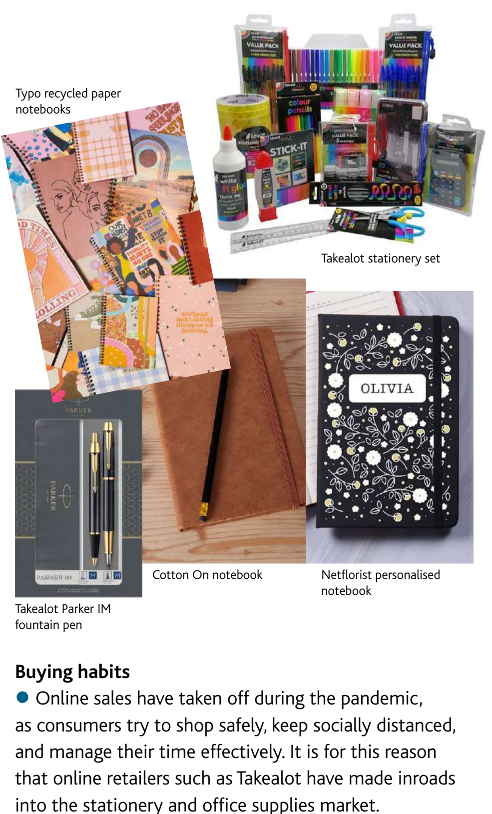
Image Oladimeji Ajegbile by Pexels

Stationery as a destination driver
As the demand for quality products increases, so too does the opportunity to create a destination shop with a carefully selected range of high-quality or bespoke stationery. A few key products that answer basic office needs are ideal – most consumers we spoke with mentioned pens, clutch pencils and lead, and notebooks as their most frequently used stationery items.

Basic school stationery is a guaranteed market, and as these requirements differ between age groups, but change very little year on year, retailers can easily base their stock on the stationery lists of local schools. A word of warning though: if you are going to offer a stationery range, do so reliably and consistently.

Retailers face stiff competition from specialist stores, forcing a cost versus quality standoff. Retailers can often afford to cut prices, or offer a lower-cost range, whereas speciality stores must also cater to consumers looking for high-end or unique solutions, gifts, and luxury items.

A Typo or Cotton On notebook may cost more than an own-brand exam pad, but certain consumers are willing to pay for a fun, quirky, or themed product. Speciality suppliers such as Waltons or Makro offer a one-stop home-office shop and also provide discounts on bulk purchases for smaller offices. Larger companies may also go direct to suppliers for the majority of their on-site office equipment and stationery needs.



Buying habits
- Online sales have taken off during the pandemic, as consumers try to shop safely, keep socially distanced, and manage their time effectively. It is for this reason that online retailers such as Takealot have made inroads into the stationery and office supplies market.
- Following suit, retailers and speciality suppliers have had to up their online shopping and collection or delivery options. As restrictions loosen, consumers who enjoy the visceral shopping experience return to stores but may still use online shopping as a convenience measure.
- Certain times of the year, particularly the back-to-school rush, result in loss-leading deals on stationery being offered to draw customers into the store. The hope here is that the deals on offer are good enough to encourage shoppers who will then complete the bulk of their shopping in-store. This approach may not be as effective in the future, however, with online shopping making it far easier for consumers to be picky about what they buy from where.

What to stock
With an overwhelming array to choose from, retailers often turn to own-brand products and traditional favourites that enjoy brand loyalty from consumers. Understanding the needs of your customer base is vital to stocking the correct array of stationery and office supplies, while also taking into account the competition from speciality suppliers and online outlets. Stores with a lower LSM base must remain price-driven, whereas stores with a consumer base that has more disposable income can look at a more varied offering.

South Africa as a growing market
An article on the Africa Business Pages website suggests that we can expect to see growth in the 2020 – 2026 period in the stationery and office supplies category, at an international level as well as the local one.

The article says, "According to a recent report issued by the Emirates Industrial Bank Journal, demand for stationery and allied paper products has seen a growth of almost 27 per cent in the last two years." A major portion of the increased imports of stationery products has been attributed to the increasing demand for these products in Dubai's re-export markets, (e)specially the emerging markets in Africa.

Dubai wholesalers offer African retailers a comprehensive range of stationery products, at a range of prices. Cheap imports from China, Korea, and Hong Kong are as readily available as higher-quality products from Europe, North America, and Asia. They also allow retailers to buy only what they need, instead of having to commit to a set container load directly from the manufacturers.

The African Business Pages article goes on to say that "Industry experts believe that African markets are extremely price sensitive and most of the requirements originating from Africa are for low priced goods – quality being a secondary consideration." It does, however, point out that South Africa is becoming known as a major destination for stationery products, with the country emerging as one of UAE's leading trading partners in the region. The report also says that South African consumers are no longer satisfied with poor quality products and are willing to pay good prices for quality products.

CNA – A case study
The journey of CNA exemplifies the pitfalls associated with being a speciality store with too many specialities. Their recent rebirth, however, shows a renewed focus on stationery and home-schooling. The CNA website states that the chain has "embarked on a 5-year growth plan focussed on smaller store/shop sizes in convenient locations to better serve the broader South African customer."

In addition to this they have narrowed their focus to a full range of "scholastic, home office and fashionable on trend items," as well as an improved arts and crafts offering (no doubt fuelled by increasingly desperate parents faced with prolonged home schooling and the entertainment of younger children).

They are also undertaking to provide a comprehensive early childhood development (ECD) range. Whether this strategy will work remains to be seen, as nobody predicted the impact Covid-19 would have on retailers and the economy as a whole. **SR**

Sources:
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www.cna.co.za
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Ann Baker-Keulemans, a highly experienced business and consumer journalist, is published in numerous print and online platforms, writing on topics related to business, lifestyle, and health, with extensive knowledge on the SA retail and wholesale landscape. She holds a Bachelor of Arts degree in English Literature (British and Commonwealth) and Media Studies and is a member of the Golden Key Honour Society. ann@wilkinsross.co.za
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Household cleaning & sanitation

Trends, insights & keeping it clean in 2021

Jessica Maria Kearney
Senior Editor, Food Ingredients First

Disinfectant and other cleaning products have been in high demand since the pandemic started and shortages in parts and the largest segment hard-hit, particularly over-the-counter (OTC) disinfectant wipes, sanitizers and cleaning products, continue to be in short supply. Meanwhile, consumers are paying more attention to what they clean with, including surface cleaners, toilet cleaners, bleach and alcohol-based products, and are looking for products that are more effective, more convenient, more hygienic and more sustainable. Here's what we think the cleaning industry can expect in 2021 and beyond.

Overview

In 2020, the cleaning products market is always-on-the-move, with consumers looking for products that are effective both externally and globally. Cleaning products are essential to keep people healthy, but they are also a source of toxic, single-use plastic waste. Consumers want products that are convenient and effective, but they also want products that consumers will always purchase at least twice.

Cleaning products are a mature market, but it is also ripe for innovation in advanced, deeper cleaning, better-for-people-and-planet formulations, and more convenient packaging. Consumers want products that are effective, convenient, hygienic and sustainable. Companies have benefitted from their consumer distribution networks and have had to adapt to the ever-changing demand and supply chain issues, while also keeping their employees safe and healthy.

Manufacturers are focused their marketing and other efforts on the "essentials" and on products that clean, disinfect, sanitize, and deodorize. Cleaning products are, and are driven by, the pandemic.

Cleaning products are essential to keep people healthy, but they are also a source of toxic, single-use plastic waste. Consumers want products that are convenient, hygienic and sustainable. Companies have benefitted from their consumer distribution networks and have had to adapt to the ever-changing demand and supply chain issues, while also keeping their employees safe and healthy.

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Clean-safe trends

- Disinfectants including surface cleaners, bleach, sanitizers, and other products that are effective against coronavirus and other pathogens will be in high demand. Companies will need to show that their products are effective against these pathogens and that they are safe to use around people.
- Consumers are increasingly buying in bulk and the "essentials" are being purchased more than other products. Companies are having to adjust their production and supply chains to meet demand. Companies are also having to adjust their marketing and other efforts to focus on the essentials.
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Cleaning up our environmental act

Consumers are increasingly concerned about the impact of household cleaning products and chemicals could have on the environment. Companies are being asked to provide more information about their products and how they, through exposure from their products, are affecting the environment. Companies are being asked to provide more information about their products and how they, through exposure from their products, are affecting the environment. Companies are being asked to provide more information about their products and how they, through exposure from their products, are affecting the environment.

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Cleaning products are essential to keep people healthy, but they are also a source of toxic, single-use plastic waste. Consumers want products that are convenient, hygienic and sustainable. Companies have benefitted from their consumer distribution networks and have had to adapt to the ever-changing demand and supply chain issues, while also keeping their employees safe and healthy.

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Laundry and powders

Laundry and powders are being affected by the pandemic. Distributors and food and beverage companies have discontinued over-the-counter sales of laundry and powders, and companies have had to adjust their production and supply chains to meet the increased awareness about hygiene.

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Sanitisation and hygiene

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In-store sanitisation

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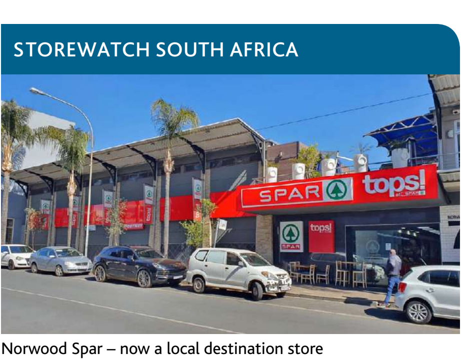
Avoid the purchase & use of antimicrobial, non-porous & practical products & surfaces

Jessica Maria Kearney is a freelance journalist and a senior editor for Food Ingredients First. Her interests include food and beverage innovation, food safety, food and beverage ingredients, and food and beverage packaging. She has been a journalist for 15 years and has written for a variety of trade publications and consumer magazines. She is also a freelance copywriter and a freelance proofreader.



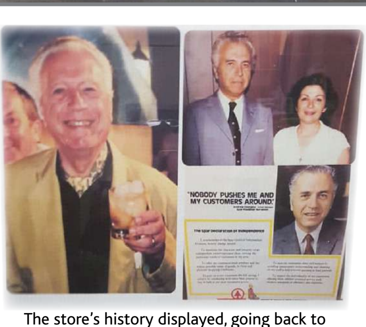
Norwood Spar – now a local destination store

Dynamite comes in small packages

Jaime van Aswegen
Staff writer
Supermarket & Retailer

Super A Spar, now known as the Norwood Spar, was established in 1938. This founder member store ranks as one of the first 10 Spar stores to open up in South Africa. Being owned and managed by family and extended family for over 83 years, co-owner George Mouskides provides us with insights about this local destination store.

Vintage image of the store

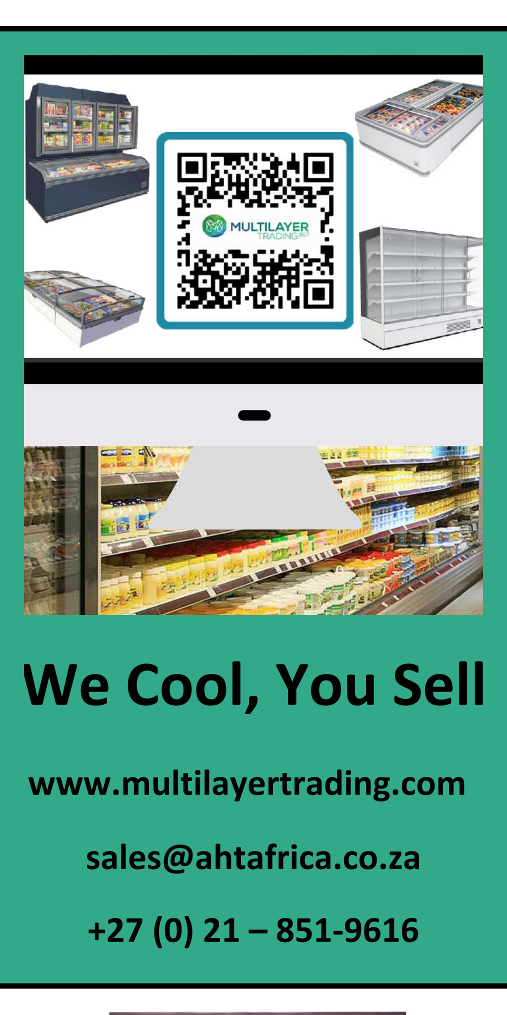


The store's history displayed, going back to Andrew who founded it in 1918

The 1 050m² FOH (2 700m² in total) retail space was scheduled for a revamp as the dreaded Covid-19 pandemic hit South Africa. Sticking with their decision, they proceeded with the revamp of the store over a year later.

A dedicated team of experts assisted and most upgrades were completed in the evenings. This ensured little to no impact on the shoppers who frequent the store. Solar panels have been installed to assist with energy generation and saving.

This store is situated in an area that is surrounded by families from various religious groups. To meet these varied community traditions and practices, the bakery caters a wide range of freshly baked goods. The store boasts a separate Kosher HMR section that follows strict regulations around meal prep. The general HMR department is also well stocked to provide simple and tasty meals that are ready-to-go. The Butchery division caters for general, Kosher and Halaal meats – all situated in dedicated fridges around the store.



Anniversary brochure from store published in 1999

It was exciting to find many different brands and products that aren't readily available in most retail outlets and, after chatting to management, it was evident that they pride themselves on sourcing and providing products for any niche request they may receive. This has ensured customer satisfaction which, in turn, has provided the store with many loyal clients.

The family essence that the business runs on can be felt all around the store, where loyal shoppers call staff members by name. The store values their staff and runs it with heart. Norwood Spar employs 110 staff, which is more than most stores this size.

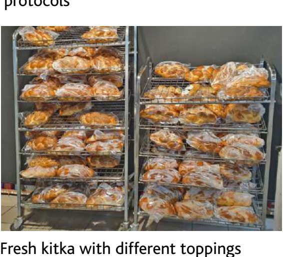
Mouskides spoke about keeping certain employees on even though they were not essential to the team. They view this as part of their social responsibility. A few old age homes and schools in the area also benefit from the store's social responsibility programme.

The Norwood Spar story reads that their objective is to continuously strive to achieve the highest standards of quality. They consistently meet the needs of every customer in caring – and in the homely way which is truly felt at this neighbourhood Spar.

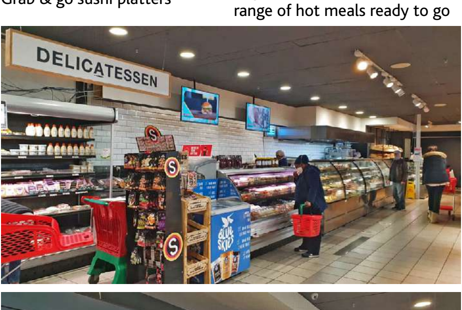
Lovely fresh produce greets shoppers

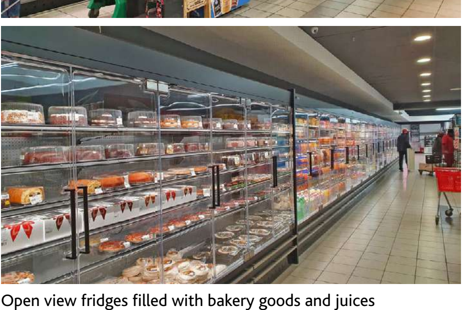
Kosher HMR following all protocols

Grab & go sushi platters

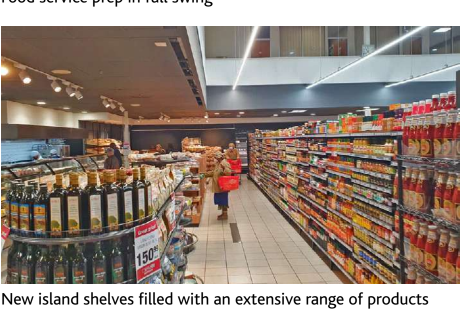

Fresh kitka with different toppings to cater for any taste

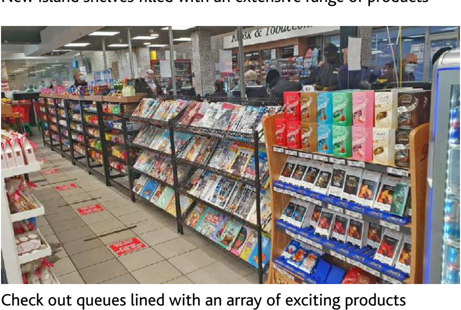
Regular HMR with an extensive range of hot meals ready to go

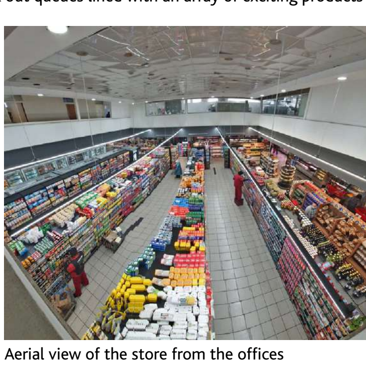


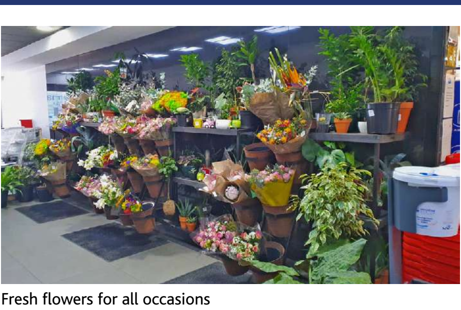

Open view fridges filled with bakery goods and juices

Food service prep in full swing


New island shelves filled with an extensive range of products


Check out queues lined with an array of exciting products


Aerial view of the store from the offices


Fresh flowers for all occasions

Checkout counters and staff follow Covid-19 protocols

Shelves are continuously restocked

Refreshments fully stocked

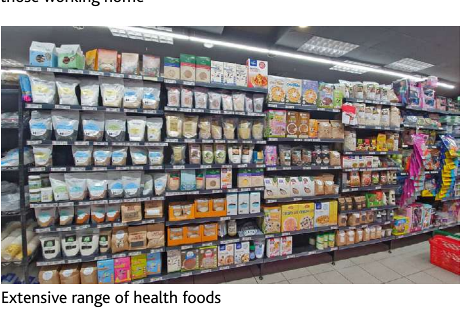
Halaal butchery items in a dedicated fridge to cater for Muslim shoppers who frequent the store

Entertainment options for children

Krispy Kreme stand filled with delicious doughnuts

Printer cartridges for those working home

Blue Skies vegan ice cream


Extensive range of health foods

Wide range of speciality drinks available in store

CBD infused products available in store

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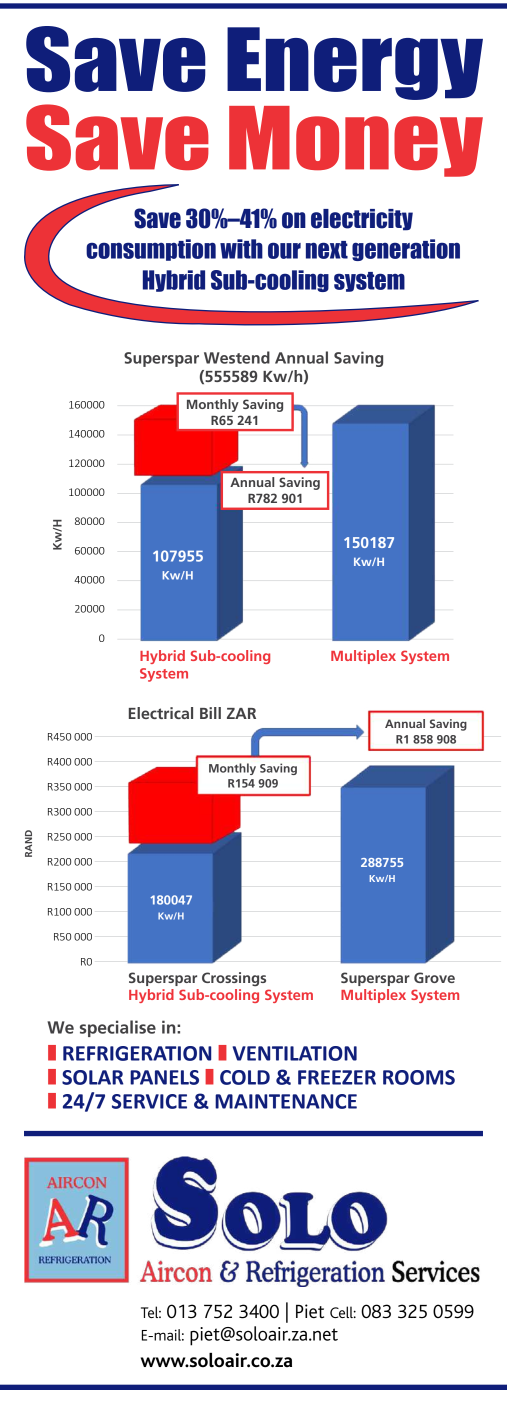

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Italian hypermarket in a lower income area

By Antonello Vilardi
adapted by Hippo Zourides

Once again, we bring a contribution from our Italian correspondent and another look at an adaptation to local conditions.

Previously a failed Auchan hypermarket, the site was taken over by COOP and refurbished earlier this year.

The local competition is intense, so the store has had to adopt certain strategies to remain relevant. So far, the formula appears to have succeded.

LOCATION	
City	Reggio Calabria
Situated	Southern Italy across from Sicily
Population	200 000
Income level	Low to middle

The sign on the outside highlights the Master Franchising agreement with Coop Alleanza 3.0

STORE	
Brand	IperCOOP
Franchise	COOP Alleanza 3.0
Format	Hypermarket
Located in	Ninfee Shopping Centre
Size	3 000m²
Storage area	1 700m²
Checkouts	16
Employees	126
Trading hours	Mon-Fri 9am - 9pm
	Sat 8.30am - 9pm
	Sun 9am - 8pm

COMPETITION	
DeSPAR	Price discounting is heavy in this market
MD	
Deco	
Supermercarti Conte	
Sigma	
CONAD	
Sidis	
Lidl	
Eurospin	

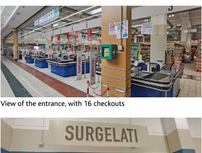
View of the large underground car park

View of the hypermarket entrance

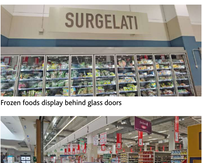
SALES	
Annual sales	€30m (R510 million)
Average basket	€25.60 (R435)
Customer count	22 400 per week
Sunday count	2 800 = 12.5% of week
Promotions	On 10 day cycles

DEPARTMENTS	
'Open squares'	Butchery
	Fresh produce
	Delicatessen
	Sushi
	Fish market
Groceries and perishables	
Non food	Electronics
	Stationery/books
	Houseware
	DIY
	Gardening
	Outdoor furniture
	Camping
	Sports
	Luggage
	Childcare
	Clothing/textiles
	Footwear
Services	Airtime
	Scratch cards
	Gift cards

Granarolo low fat milk 1 litre is the biggest seller in the store, having sold 100 000 Skus in one year



View of the entrance, with 16 checkouts



Frozen foods display behind glass doors

Perspective of the checkout area viewed from the shopping centre

PRODUCT MIX	
No. of SKUs	30 000
Branded products	Most important
Private label (PL)	Less so
PL contribution	13%

MAIN STRATEGIES
COOP loyalty card (usage 90%)
Enhanced fresh departments
Recently refurbished
Discount prices
Regular promotions

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Glacier Frameless Sliding Door Systems

CASE CLOSED
Energy Saving Solutions

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Covid-19 pandemic shifts consumer demand for dairy products

By Khathu Musingadi
Research Analyst
at BMi Research

The Covid-19 pandemic has resulted both in shifts in consumer demand for dairy products as well as changed consumer purchase habits with fewer customers in-store and consumers favouring garage forecourts given their convenience.

As a result, garage forecourts have adjusted their product mix to ensure a more balanced offering between immediate consumption and future consumption pack alternatives.

BMi Research reveals that the local dairy market weathered these shifts in dairy products relatively well.

> "The biggest winner in these consumer shifts was the buttermilk and maas category which recorded volume growth in 2020 compared to 2019."

Unfortunately, it was the only value-added dairy category which recorded volume growth during the year.

The reason for this is that both buttermilk and maas are viewed as affordable and healthy beverage alternatives, consumed with meals, to which consumers migrate during tougher economic times. This was particularly evident given that volumes of larger and more affordable pack sizes grew, with garage forecourts and bottom end retailers showing the most prominent volume growth as a result of their convenience relative to other larger outlets.

Despite the popularity of buttermilk and maas, particularly amongst middle to lower end consumers, it is expected that volumes of both products will remain fairly static this year. Inevitable price increases as a result of growing input costs are expected to lead to some degree of resistance from consumers.

Other dairy beverages were not as fortunate with volumes of drinking yoghurt, spoonable yoghurt and dairy juice blends all declining in 2020 compared to 2019 largely as a result of a depressed local economy and high levels of unemployment which resulted in consumers diverting their spend to food essentials.

Drinking yoghurt is regarded as relatively more expensive than other beverage alternatives. It's also a popular on-the-go consumption beverage. However, with Covid-19 enforced lockdowns consumers were mostly at home which was less conducive to drinking yoghurt consumption.

Although drinking yoghurt volumes declined across all channels in 2020 – in particular for smaller pack sizes – top end retailers recorded a smaller decline. It is expected that the drinking yoghurt category will see further declines before staging a recovery given the third wave of Covid-19 infections and the unrest seen in July.

Spoonable yoghurt has traditionally been positioned as a healthy alternative as well as an on-the-go meal, snack or lunchbox treat for children. This positioning, combined with increased awareness around healthy eating, has allowed this category to enjoy increased acceptance and to penetrate new consumer segments in recent years. Despite a number of innovations around flavours and the emergence of high-protein and indulgence variants, this category was not exempt from the volume decline trend.

> "The biggest declines have been in immediate consumption packs as consumers have focused more of their spend on family pack sizes that are more affordable."

The category is expected to recover over the medium to longer term as consumers become more active and mobile, and children return to school.

Dairy juice blends followed a similar downward volume trend in 2020, again as a result of the negative performance of the local economy which meant that consumers were more focused on purchasing essentials rather than this product, which is perceived to be more expensive than other beverage alternatives.

Sales through wholesalers and top end retailers showed a smaller decline than other channels, arguably because these channels were open more consistently during the lockdowns.

As consumers become increasingly more mobile in 2021 it is anticipated that this will help the dairy juice blends category to recover.

Although milk production continued despite the lockdowns imposed in response to the Covid-19 pandemic, not surprisingly, exports and sales through on consumption outlets declined in 2020.

Exports declined due to longer border crossing lead times and economic declines across most Southern African countries while enforced lockdowns constrained sales at on-consumption outlets. Excess milk was directed towards milk powders, cheese, buttermilk and maas with the result that prices of these products reduced in the second quarter of 2020. There was also a shift towards UHT milk at the expense of fresh milk.

According to a joint OECD-FAO Agricultural Outlook 2020 – 2029 report, milk supplies are forecast to grow more rapidly than demand for milk. This is likely to put pressure on unprocessed milk prices while demand in low-income markets is expected to decline as a result of a decrease in disposable income. SR

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NielsenIQ has completed a new report on the effects of South Africa's liquor bans, including verified data up to end Q1, 2021 and insights and analysis of '*Where to from here?*' for the local sector

The true cost of liquor bans

South Africa's latest liquor ban equated to a loss of R7.6-Billion during the four weeks it lasted (based on average sales – 13 weeks to end of May 2021 of R1.9-Billion per week). This stems from a NielsenIQ report entitled ***Recovering from a Sobering Situation*** which offers in-depth data and insights, against the backdrop of the local liquor sector heading into uncharted territory due to South Africa's globally unprecedented liquor bans. The report data is drawn from a variety of industries and included off-site consumption, namely grocery chains, self-service, counter service and semi-wholesalers and redistributors as well as on-site consumption at licensed taverns, local bars, and pubs. Not included were restaurants, hotels, markets, and events.

> "What the study found, is that with each new wave and lockdown; immediate pre- and post-lockdown behaviour changes are merging into a pattern and people are not reverting to behaviours, and in certain cases products, that were favoured before Covid-19. The reality is a changed consumer and changed in-store shopping patterns."
>
> **Ged Nooy – NielsenIQ SSA Commercial Director**

Looking back at the financial fallout of the liquor ban the report found that after the First Prohibition (June 2020) the sector was able to recover two weeks of lost sales but these gains were short-lived and rapidly declined in the weeks that followed. Consumers also carefully considered which categories to purchase in case of re-closure and spirits and wine captured 78% of incremental sales in the weeks post prohibition.

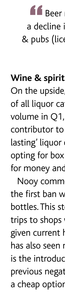
Sales after the Second Prohibition (September 2020) also initially gained ground for three weeks but in the ten weeks that followed were less than the Same Period Last Year (week ending 15 November 2020) and by the end of 2020, liquor sales were down by 36% year on year (2020 vs. 2019).

Beer takes a beating

After the end of the third ban in January this year, liquor categories performed quite differently in terms of regained sales and growth. In the first quarter of 2021, liquor grew across all categories except beer which remained under pressure, driven by a decline in on-consumption in taverns, local bars & pubs (licensed) which has resulted in less demand through the wholesalers.

Numerous factors have contributed to this including a decline in those who are buying beer in taverns. The increase in Constrained Consumers (those impacted by job and income loss) – of whom 66% are newly constrained (NielsenIQ Consumer Insights Study 2020) – has led to altered patterns and purchase behaviour to better manage their reduced spending. They have been heavily impacted by pressure on the economy and their finances/income and they simply don't have the cash to spend in Taverns.

So, despite beer experiencing single-digit growth in March 2021, due to the absolute size of beer in the category, sales were 33% less versus the same period last year (NielsenIQ RMS 5-week sales period ending 04/04/21). At a total market level (on and off consumption) beer was therefore undeniably under pressure.

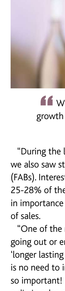


> "Beer remained under pressure, driven by a decline in on-consumption in taverns, local bars & pubs (licensed) which has resulted in less demand through the wholesalers."

Wine & spirits fight back

On the upside, wine and spirits showed the most growth of all liquor categories and picked up in terms of sales and volume in Q1, 2021. Of this, box wine was the biggest contributor to volume. Consumers are moving to 'longer lasting' liquor options which are clearly shown by them opting for box wine, which they perceive as better value for money and at the right price point for stocking up.

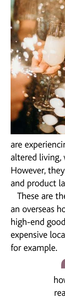
Nooy comments; "This speaks to the trends we saw after the first ban where consumers were buying longer-lasting bottles. This stocking up also reduces the number of trips to shops which is a big consideration for consumers given current health and safety concerns. This category has also seen notable product innovation/adaptation is the introduction of 'premium boxed wines' to counter previous negative perceptions as boxed wine being a cheap option.



> "Wine and spirits showed the most growth of all liquor categories and picked up in terms of sales and volume"

"During the last few weeks of the first quarter of 2021, we also saw stimulation in Flavoured Alcoholic Beverages (FABs). Interestingly, prior to Covid-19 large cans averaged 25-28% of the total category sales but they have gained in importance and during Q1, 2021 commanded 33% of sales.

"One of the reasons for this is that people are not going out or entertaining as much. They are happy to buy 'longer lasting bottles' like quarts and box wine as there is no need to impress their guests and image is no longer so important! In line with this, the industry has also seen a dip in sales of premium gin and has moved away from the incredible growth seen in the ultra-premium gin category before Covid-19."



Insulated high-end consumers continue to spoil themselves

It is important to remember this segment – although they only make up 2% in this market. Insulated Consumers (those who have not been impacted by job losses and the resultant wallet squeeze) and whose spending remains fairly resilient ... they are experiencing some reset behaviours due to their altered living, working and entertaining circumstances. However, they still want to experiment and innovation and product launches still appeal to them.

These are the consumers who would normally travel for an overseas holiday at least once a year who appreciate high-end goods and still want to spoil themselves with expensive local holiday expensive and premium whiskey, for example.

> "The big question now is how do manufacturers and retailers reach this highly desirable segment of consumers who are still not as keen to go out?"

This is where NielsenIQ highlights the continued rise of the omni-shopper experience using channels such as: Social media endorsements, whisky and wine clubs and innovative online shopping options, amongst the insights contained within the report. SR

NielsenIQ provides a complete, unbiased view of consumer behaviour. Powered by a ground-breaking consumer data platform and fueled by rich analytic capabilities, it enables bold, confident decision-making for the world's leading consumer goods companies and retailers. NielsenIQ has operations in nearly 100 markets, covering more than 90% of the world's population. Visit www.nielseniq.com.

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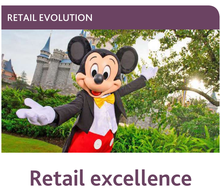


Retail excellence ... an ever moving target

Jane Sarah Rosen

I have a strong memory from my childhood. My Dad, a retail man, was going to Disney World for work. Being eight years old, the prospect of my father hanging out with Mickey Mouse for the sake of business was beyond me. I recall Dad coming home after three weeks of being away in Florida. Being one of a triplet, the three of us sat at the foot of his bed while he told us stories of team building events, showed us shaky handcam recordings of war cry anthems being yelled by teams clothed in brightly opposing coloured t-shirts, and projected photos of work colleagues posing with the beloved Mickey outside the Epcot centre. He had magic in his eyes, the future of South Africa's retail was glittering with potential.

Many years later with dad retired and my parents moving house, the three of us kids, now young adults, were helping to sift through items that had accumulated over three decades.

Mountains of memories in the form of photo albums, video cassettes and primitive nursery school scribbles prompted a nostalgic trip into the past. It was here that we revisited the same video tape of the 1997 Disney trip, a now shockingly pixelated account in comparison to the mobile phone video capabilities of today. Dad retold the story of how a top South African retailer took a team of people to Disney World in an attempt to learn greatness from the best.

The purpose of the trip, I now understood, was bigger than Mickey. Its objective was to instil a set of core values into these trainees and managers that would, in turn, re-energise the very values that drove the in-store retail shopping experience for staff and customers alike. It seemed like a magical period in the retail age, where those who could, were able to gain the knowledge to execute the highest levels of global retail excellence right here on South African soil.

So often a trip to the supermarket is a banal and begrudged activity.

Fuelled by parking bay battles, overcrowded avocado-pokers in the fresh food section and unfriendly staff asking flatly for loyalty cards, disinterested that you, once again, left your shopping bags at home.

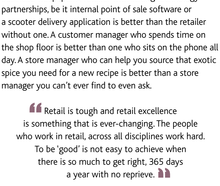
Surely this was not the retail excellence dream of the 90's?

Fast forward to today, and I find myself working with top people on all sides of retail; store managers, head office executives, merchandising agencies, distributor partners and brands alike. I have much to learn, but I know the age-old elements of retail execution in more detail now and I understand how complex it all is; inventory management, merchandising and display efforts, in-store promotional executions, broadsheet production, planogramming, ranging and customer service. These are the basics, which, if you get right, you have a good store. But is this enough to make it a great one?

Technology and pandemics aside, I so often hear from friends how a trip to the supermarket is a banal and begrudged activity. Fuelled by parking bay battles, overcrowded avocado-pokers in the fresh food section and unfriendly staff asking flatly for loyalty cards, disinterested that you, once again, left your shopping bags at home. Surely this was not the retail excellence dream of the 90's? Has the global standard of retail simmered down to the bottom line as a sole measure, rather than a strive for brand pageantry and innovation both on shelf and online? Or do profits and pomp have nothing to do with one another?

Each retailer has their own aesthetic, their own identity and their own philosophy. On the one side of the spectrum, less is more. We see this in the higher LSM retail category a lot; a regard for minimalism as a core value is key. There is no place for banners, bunting and dump bins. A well-lit and well-stocked shelf is the only thing that matters. Price is irrelevant when you are giving your customer what they want. For those on the other end of the spectrum are retail chains who believe more is more. Originating from the 'hypermarket' era of the 1970's and inspired by big-box stores in France and the US, these chains hinge their values on an immersive shopper experience. The key here is customer engagement and in order to delight shoppers in a more meaningful way, brands must flood the floor with a vast range of brand activity. This includes parking bay media, retail radio humming in the background, wet demo promoters offering shoppers a taste of new products, bunting suspended between aisles, dump bins full of delights, flashing aisle wobblers catching our line of sight and free-standing units (FSUs) piled with product at every turn. Price in this territory is king.

If both philosophies, albeit wildly opposite in values, have a place in retail, then is retail excellence linked to what we see in a store or is retail excellence linked to how we feel in a store? And if it is linked to how we feel in the store, then surely being able to build a relationship with your local supermarket manager is more important than dump bins piled with discounted washing powder. Others would argue that the perception of greatness is in the hands of the trolley-beholder; with one LSM group appreciating the price of the soap, and the other, the soap's branding efforts.



However, irrespective of the retail group or LSM, the investments that retailers make into their people, their stores, their suppliers and their partnerships determine greatness. A retailer with an epic loyalty campaign is better than the retailer with a poor one. A store filled with well-designed and strategically placed in-store advertising structures is better than a poorly lit store with fading bulkhead wallpaper. A retailer with strong technology partnerships, be it internal point of sale software or a scooter delivery application is better than the retailer without one. A customer manager who spends time on the shop floor is better than one who sits on the phone all day. A store manager who can help you source that exotic spice you need for a new recipe is better than a store manager you can't ever find to even ask.

> "Retail is tough and retail excellence is something that is ever-changing. The people who work in retail, across all disciplines work hard. To be 'good' is not easy to achieve when there is so much to get right, 365 days a year with no reprieve."

With so much evolving in the retail space in terms of online shopping, 60 minute delivery services, social media platforms and online content, retail greatness is an ever moving target. When we look at the global standards and the evolution of retail spaces like Amazon Go, there is still so much for South African retailers to learn. Our industry must continue to strive for global retail standards, however high the bar may be. Management must continue to travel and bring back new ideas. Operational teams have to take risks investing in big-idea projects, like field sales platforms and artificial intelligence technology. The future isn't around the corner, it has already arrived and it is evasive, impressive, impatient and fast moving. Retailers have to get closer to their customers and give them what they want, even if shoppers don't quite know what that is yet.

Retailers cannot marinade in the lukewarm puddles of 'good enough'. They need to dive deeper and push harder to continually strive for retail excellence. Disney was just the start of it. Times have changed but the future of South Africa's retail is glittering with potential. SR

Jane Sarah Rosen is Co-Founder of ConnectGroup & Head of Software at MegaVision Media. Jane specialises in FMCG and retail technology platforms. She has eight years of experience working with global brands, local retailers and agency / distributor partners, particularly on B2B field sales technology platforms. Jane also works very closely with the ConnectGroup's parent company MegaVision Media, particularly on the reporting dashboards for township branding projects.

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CASE CLOSED
Energy Saving Solutions

Glacier Door Systems has introduced their **Close the Case** Glass Door retrofit solutions for refrigerated supermarket display cases, existing glass door freezer rooms and glass door freezer display cabinets. These solutions guarantee energy-savings in an ever-increasing energy cost environment.

Features and Benefits

- Double glazed glass doors with Argon gas fill for superior insulation.
- Glass durability and clarity with torsion bar for positive closing.
- Glass door heating option for high humidity environments.
- Glass doors available with hold open brackets and LED lighting options.
- Flex modelling means glass panels are customised to fit existing cabinets and are tailored to suit each store's specific environment.

Air Shield Glass Doors

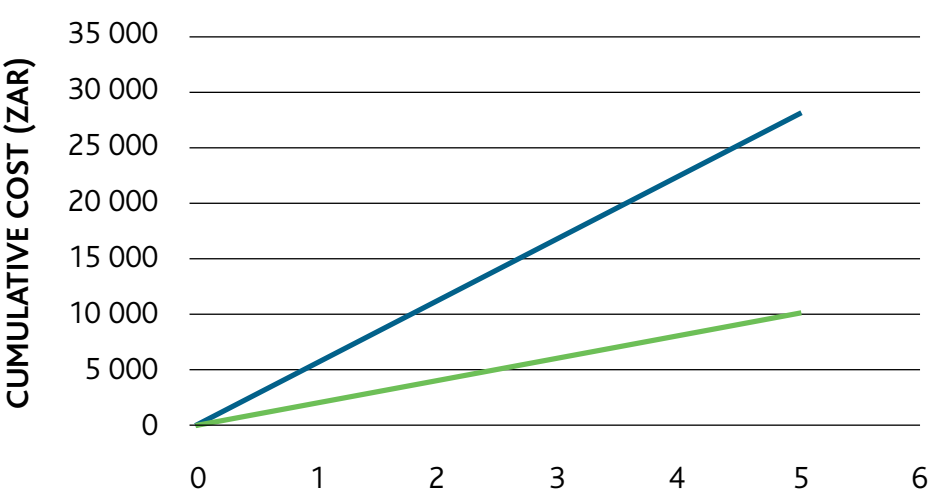
A quick and easy energy-saving retrofit solution, Air Shield Glass Doors can be fitted to any existing open refrigeration case, saving up to 40% on energy consumption.

Note: The value proposal is based on R1.31 per kWh and 40% energy saving. These are averages based on our experience and can be validated per store.

Eco Leaf Freezer Doors

Designed as a 'swop-out', energy-saving replacement glass door utilising 220V technology that eliminates the need for voltage-reducing capacitors. This results in an amperage reduction from 1.29A on the standard door to 0.46A (64%) with the replacement Eco Leaf Door.

Note: The value proposal is based on R1.31 per kWh and 64% energy saving. These are averages based on our experience and can be validated per store.



	AMPS	VOLTS	WATTS
Glacier Eco Leaf Door	0,46	230	105.8
Glacier Standard Door	1,29	230	296.7

The value benefit

- High-quality locally manufactured solutions featuring the latest energy-saving technology.
- Demonstrated good pay back periods can be expected.
- Customised solutions to suit your store.
- ISO 9001 accredited factory.
- Safety toughened glass in accordance with SABS/ SANS certification.
- Flexible installation timing to offset any customer disruption.
- Financing options available.

You can trust a Glacier door

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