Global Retail Trends 2010

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Key Findings

Covering Trends in Global Retail Markets

- In major markets like the US and the UK, retail spending is expected to decline, while emerging markets like China expect a growth in 2010.
- There are signs of improvement for US consumers, but the recent destruction of wealth is expected to limit consumer spending.
- Asia is believed to represent the best growth prospects for retailers and consumer-products companies in 2010.
- In India, garments, fashion accessories, cosmetics and white goods are expected to continue the uptrend of 2009 in 2010 and beyond.
- Forecasts show a continued growth of functional food in 2010, for example by a higher nutritional value for consumers.

Company and Product Information

About our Reports

Market reports by yStats.com inform top managers about recent market trends and assist with strategic company decisions

A list of advantages

- yStats.com provides secondary market research: By using various sources of information we ensure maximum objectivity for all obtained data. As a result companies get a precise and unbiased impression of the market situation.
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- Headquartered in Hamburg, Germany, the firm is a specialist for secondary research with a strong international focus.
- Major clients include Otto Group, Wirecard, Credit Suisse, Deloitte, Red Bull, Beiersdorf and Deutsche Post.

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Table of Contents (1 of 3)

Global Retail Trends 2010

Table of Contents (2 of 3)

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Table of Contents (3 of 3)

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Samples

One of the consumer goods spending trends for 2010 is that local and regional grocery players will become acquisition targets.

Top 5 Retail Spending Trends

- Discretionary spending cutbacks continue to change the way consumers shop. Consumers now use coupons with an enthusiasm not seen in many years—for the first three quarters of 2009, Inmar reported that manufacturer coupon redemptions were up 26%.
- Food departments outperformed nonfood, health and beauty and general merchandise departments as Americans returned to cooking and eating at home—boosting grocery channel shopping trips in the process. Store brands grew becoming an acceptable alternative—or even preferred brand—for many. Meanwhile, consumers "traded down" across categories, preferring chicken, turkey and pork to beef and seafood. While value channels such as supercenters, club and dollar stores, as well as online retailers, drove shopping trips to their stores, discretionary retail channels (home improvement, office supply and pet stores) saw declines.

Top Five Consumer Goods Spending Trends in 2010

1. **Restraint remains the new normal.** Americans' confidence has been slower to rebound compared to other parts of the world. The need to save money, unemployment and other economic issues continue to be top of mind, suggesting that any return to past behavior may take some time—if at all.
2. **Value is a top priority.** With no signs of readiness to open wallets, a focus on low prices at the expense of all other variables threatens margins. Value messaging must also include some point of differentiation beyond pricing. Manufacturers and retailers that "drive the recession wave" and take an active role in innovation and ad spending are likely to be the big winners.
3. **Store brand growth continues.** Even with year-end 2009 softness in store brand dollar share growth as retailers cut prices across the store to be more competitive, unit share growth continues and retailer focus has never been stronger.
4. **Grocery consolidation intensifies.** Local and regional players, unable to drive profits in the soft economy, will become acquisition targets and some larger national and regional grocers will divest unprofitable formats and banners to strengthen investments behind their winning formats and banners.
5. **Assortment wars escalate.** Retailer efforts to simplify the consumer shopping experience by eliminating aisle and shelf clutter will cause market share land grabs for small and medium-sized brands in pursuit of elusive revenue growth. Retailers may lose sales as they shift away from in-store merchandising that drove impulse buying and built shopper baskets. Look for brands caught in the trap of greater store brand focus and assortment optimization to forge alliances with key retailers, enter or step-up efforts as store brand suppliers, and/or explore direct-to-consumer sales.

Source: Brandweek, December 2009

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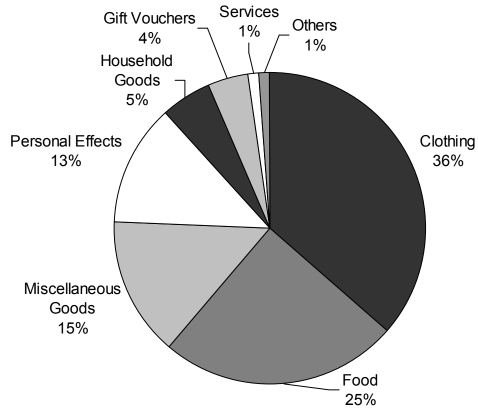
Clothing (36%) was the top category sold at department stores in Japan in April 2010, followed by food (25%).

Japanese Department Stores Sales Breakdown, by Category in %, April 2010



The survey covered sales at 92 department store operators with 267 shops.
Source: Japan Economy News, May 2010

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