

Mexico Retail Market Analysis: Traditional & Non Traditional Trade.



Mexico Retail Market Analysis

Phase I: Market Analysis.

- Mexico Overall Traditional & NON Traditional Market.
- Construction Sector estimate Growth for 2017.
- Hardware Market.
 - How Big is the hardware Business ?
 - How many stores in Mexico ?
 - Best Brands in Mexico ?
 - Best Distributors in Mexico ?



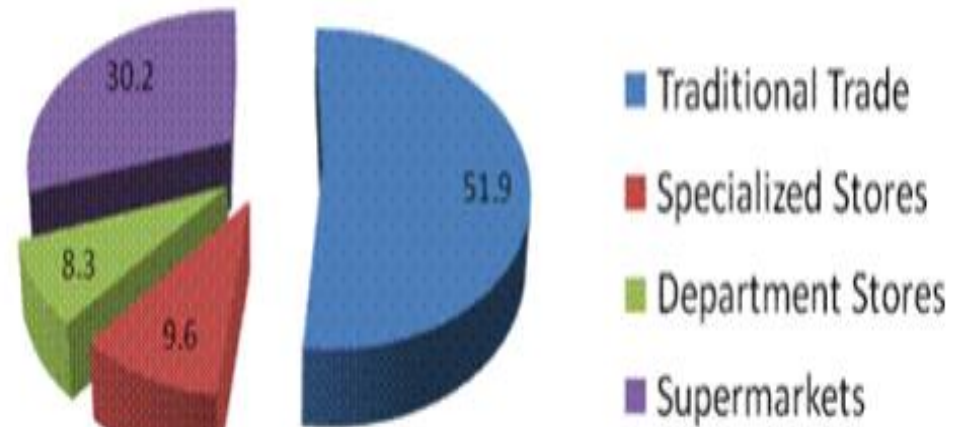
Mexico Retail Market Analysis

Phase I: Market Analysis.

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127 Millions People.

Retail Sales by Type and Percent



Mexico Retail Market Analysis

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What is ANTAD :

National Association of Department and Self service Stores

“Asociación nacional de Tiendas de Autoservicio y Departamentales”



106 Retail Chains are members of ANTAD



Especializadas

58 Specialized chains.



Autoservicio

32 Self-service stores chains.



Departamentales

16 Department Stores chains.



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SELF SERVICE

32 Chains
5,410 Stores
14.738,554 m2 retail space

DEPRATMENT STORES

16 Chains
2,152 Stores
6,048,360 m2 retail space

SPECIALIZED

56 Chains
43,964 Stores
6,609,095 m2 retail space



AUTOSERVICIOS

32 cadenas
5,410 tiendas
14'738,554 m² de piso de venta

DEPARTAMENTALES

16 cadenas
2,263 tiendas
6'048,360 m² de piso de venta

ESPECIALIZADAS

56 cadenas
43,964 tiendas
6'609,095 m² de pisos de venta



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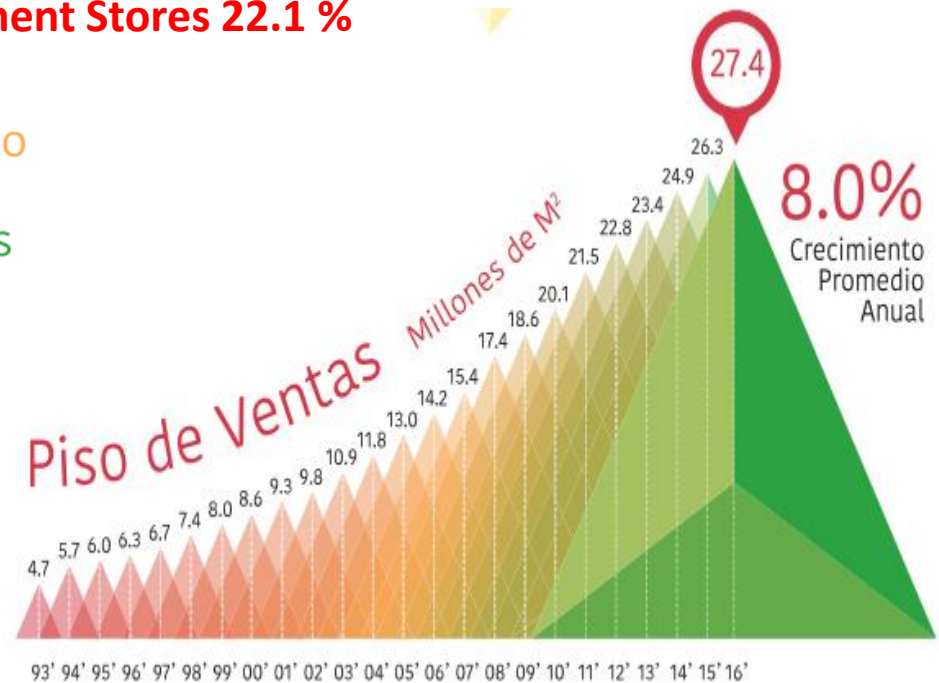


Retail Floor by type

Self Service stores **53.8 %**

Specialized **24.2 %**

Department Stores **22.1 %**



Retail Floor are growing at a rate of **8.0 %** annually with more than **27.4 million square meters of retail space** at the end of 2016



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ANTAD Members Sales

VS

Traditional Retail Sales

ANTAD Members Sales as a % of the total commerce PIB **19.6%**

Ventas ANTAD vs Ventas Nacionales al Menudeo



ANTAD = 47.6% Ventas Totales al Menudeo



Estadísticas

It has been growing every year



Mexico Retail Market Analysis

Mexico Retail Market Overview

Total Stores by Customer: **Hyper Supermarkets Stores**

Main Products:

- Food.
- Clothes.
- Cleaning Products.
- Pharmacy.

Opportunity:

- **ALL CATEGORIES.**

















Logo	Customer	Stores	Income Level Customers
	HIPER SORIANA	320	Mid
	WALMART	250	Mid
	CHEDRAUI	145	Mid



Mexico Retail Market Analysis

Mexico Retail Market Overview

Total Stores by Customer: **Supermarkets**

Logo	Customer	Income Level Customer	Only FOOD	Logo	Customer	Income Level Customers
	MERZA	Low	Only FOOD		BORGUSA	Low
	SU BODEGA	Low			SMART & FINAL	Mid
	DRAMBUPO	Low			S PLAZA	Low
	CENTRO COMERCIAL CRUZ AZUL	Low			SUPER ALAN	Low
	GPA	Low			SUPPER AHORROS	Low
	ZORRO	Low			GUTIERREZ	Low
	PITICO	Low			SUPER SAN FRANCISCO DE ASIS	Low















Mexico Retail Market Analysis

Mexico Retail Market Overview

Total Stores by Customer: **Supermarkets**

Only
FOOD

Logo	Customer	Income Level Customers	Logo	Customer	Income Level Customers
	SUPER WILLY'S	Low		SUMESA	Mid
	ARTELI	Low		AL PRECIO	Low
	SUPER DEL NORTE	Low		S-MART	Low
	SUPER KOMPRAS	Low		CITY MARKET	High
	SUPERETTE	Low		FRESKO	High
	DEL RIO	Low		BODEGA CM	Low



Mexico Retail Market Analysis

Mexico Retail Market Overview

Total Stores by Customer: **Department Stores**

Main Products:

- Clothes.
- Fashion Accessories.

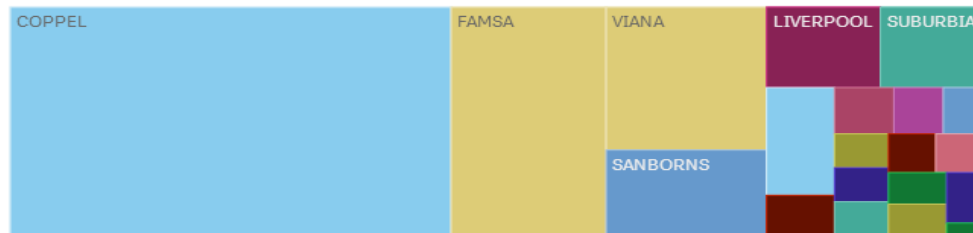
Opportunity:

Those Stores covers

Low , Middle and High Class

Depend on the Stores:

- Furniture
- Luggage
- Hardware



Logo	Customer	Stores	Income Level Customers
	LIVERPOOL	100	High
	PALACIO DE HIERRO	25	High
	SEARS	80	Mid
	COPPEL	1,100	Low
	FAMSA	387	Low
	SUBURBIA	90	Mid
	WOOLWORTH	30	Low
	FABRICAS DE FRANCIA	20	Mid



Mexico Retail Market Analysis

Mexico Retail Market Overview

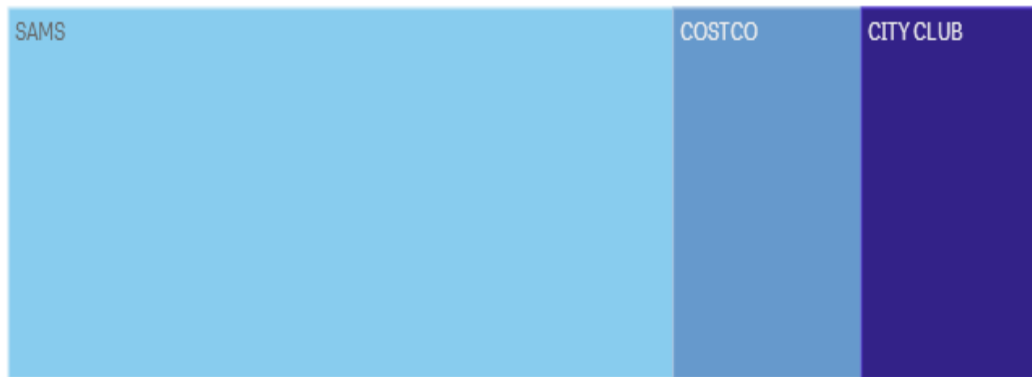
Total Stores by Customer: **Price Clubs**

Main Products:

- Food.
- Clothes.
- Cleaning Products.
- Pharmacy.

Opportunity:

- **ALL CATEGORIES (Higher level products).**



Logo	Customer	Stores	Income Level Customers
	SAMS	120	Mid
	COSTCO	34	High
	CITY CLUB	33	Mid



Mexico Retail Market Analysis

Mexico Retail Market Overview

Total Stores by Customer: **Dollar Stores**

Main Products:

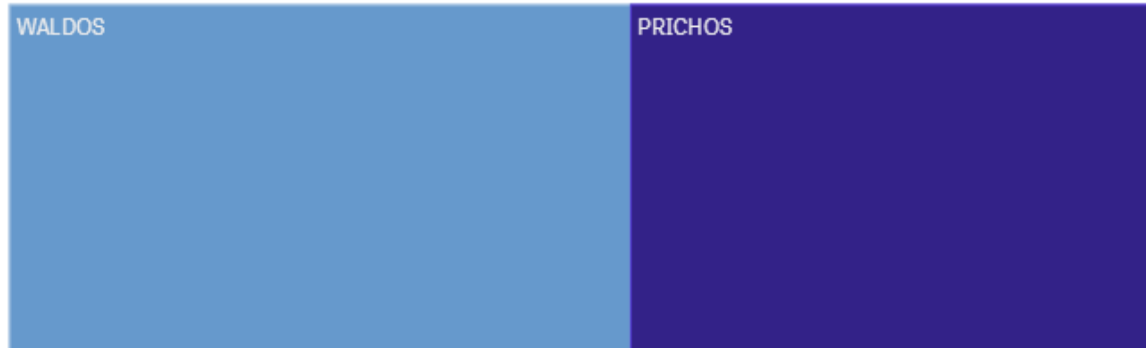
- General Merchandise.
- Toys.
- Cleaning Products.
- Fashion Accessories.

Opportunity:

Low Class

- **Toys.**
- **Dollar Items.**
- **Impulse.**
- **Stationary.**
- **Hardware.**

Logo	Customer	Stores	Income Level Customers
	WALDOS	380	Low
	PRICHOS	320	Low



Mexico Retail Market Analysis

Mexico Retail Market Overview

Total Stores by Customer: **Specialized**

Logo	Customer	Stores	Income Level Customers
	FARMACIAS SIMILARES	4,000	Low
	SUPER FARMACIA GUADALAJARA	1,200	Low
	FARMACIAS DEL AHORRO	1,030	Mid
	FARMACIAS BENAVIDES	360	Mid
	FARMA TODO	102	Low
	SUPERFARMACIAS EL FENIX	72	Low

Logo	Customer	Stores	Income Level Customers
	FARMACIAS KLYNS	71	Low
	MEDEXX SUPER FARMACIA	70	Low
	FARMACIAS SAN PABLO	34	Low
	ESQUIVAR	30	Low
	FARMACIAS SAN FRANCISCO DE ASIS	30	Low

FARMACIAS SIMILARES

SUPER FARMACIA GUADALAJARA

FARMACIAS DEL AHORRO

FARMACIAS BENAVIDES

Pharmacy





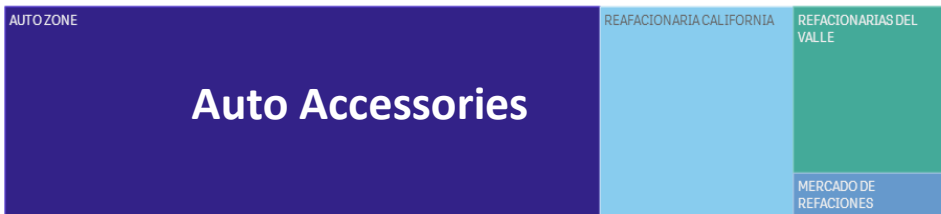
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Mexico Retail Market Overview

Total Stores by Customer: **Specialized**

Logo	Customer	Stores	Income Level Customers
	AUTO ZONE	400	Mid
	REAFACIONARIA CALIFORNIA	130	Mid
	REFACIONARIAS DEL VALLE	83	Mid
	MERCADO DE REFACIONES	22	Mid

Logo	Customer	Stores	Income Level Customers
	HOME DEPOT	107	Mid
	LOWE'S	11	High



Mexico Retail Market Analysis

Mexico Retail Market Overview

Total Stores by Customer: **Specialized**




Logo	Customer	Stores	Income Level Customers	Logo	Customer	Stores	Income Level Customers
	OFFICE MAX	255	Mid		ELECTRA	200	Low
	OFFICE DEPOT	100	Mid		STEREN	100	Mid
	TONY SUPER PAPELERIAS	70	Low		RADIO SHACK	70	High
	OFIX	21	Low		BEST BUY	10	High
	ADOSA	5	Low		MOBO Shop	200	Mid

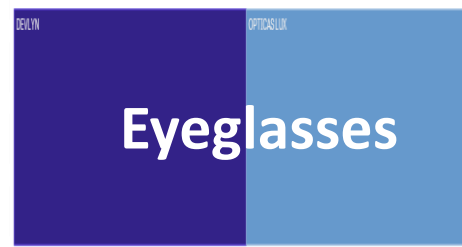


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Total Stores by Customer: **Specialized**

Logo	Customer	Stores	Income Level Customers	Logo	Customer	Stores	Income Level Customers
	INGENIA MUEBLES	85	Mid		DEVLYN	110	Mid
	THE HOME STORE	17	High		OPTICAS LUX	90	Mid
	BED, BATH & BEYOND	10	High				
	ALAMCENES ANFORA	33	Mid		MASKOTA	311	Mid
	ANFORAMA	30	Mid		PETCO	5	High



THANKS

