Traditional & Non Traditional Trade.



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?





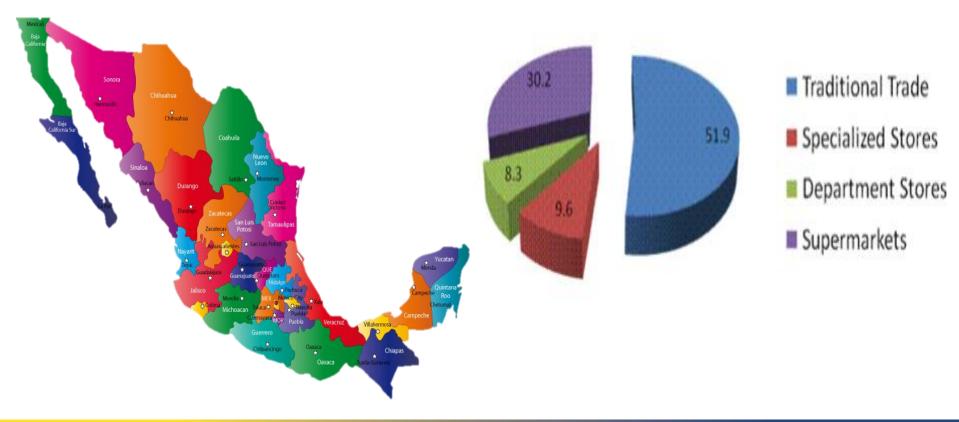


Phase I: Market Analysis.

Mexico Overall Traditional & NON Traditional Market.

127 Millions People.

Retail Sales by Type and Percent



Phase I: Market Analysis.

Mexico Overall Traditional & NON Traditional Market.



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



58 Specialized chains.

32 Self-service stores chains.

16 Department Stores chains.



Phase I: Market Analysis.

Mexico Overall Traditional & NON Traditional Market.



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

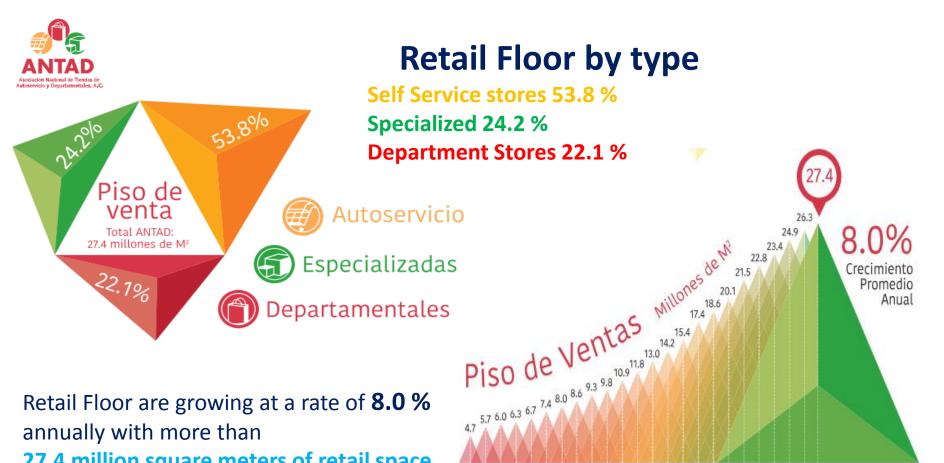
ESPECIALIZADAS

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



Phase I: Market Analysis.

Mexico Overall Traditional & NON Traditional Market.



27.4 million square meters of retail space

93' 94' 95' 96' 97' 98' 99' 00' 01' 02' 03' 04' 05' 06' 07' 08' 09' 10' 11' 12' 13' 14' 15' 16'



at the end of 2016

Phase I: Market Analysis.

Mexico Overall Traditional & NON Traditional Market.



ANTAD Members Sales

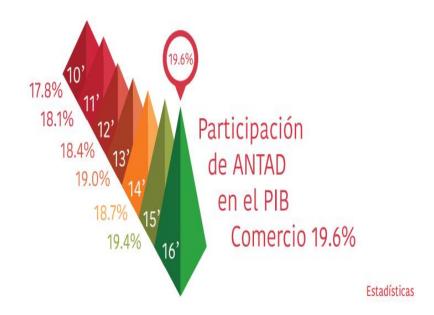
VS

Traditional Retail Sales

Ventas ANTAD vs Ventas Nacionales al Menudeo



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



It has been growing every year



Mexico Retail Market Overview

Total Stores by Customer: Hyper Supermarkets Stores

Main Products:

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

Opportunity:

ALL CATEGORIES.

HIPER SORIANA	WALMART	CHEDRAUI
		MEGACM

Logo	Customer	Stores	Income Level Customers
Soriana.	HIPER SORIANA	320	Mid
Walmart Save money. Live better.	WALMART	250	Mid
CHEDRAUI Guesta menos	CHEDRAUI	145	Mid



Mexico Retail Market Overview

Total Stores by Customer: Supermarkets

Logo	Customer	Income Level Customer	Only	Logo	Customer	Income Level Customers
merza	MERZA	Low	FOOD	BUSOSUSA.	BUJLOSUSA	Low
<u>su Bodega!</u>	SU BODEGA	Low		Smart&Final.	SMART & FINAL	Mid
STANSON OF THE STANSO	DRAMBUPO	Low		S PLAZA Suprepart	S PLAZA	Low
CENTRO COMPRCIAL CRUZ AZUL	CENTRO COMERCIAL CRUZ AZUL	Low		uper	SUPER ALAN	Low
Grape Dana Massacino	GPA	Low		Super Ahorros	SUPPER AHORROS	Low
ZORRO	ZORRO	Low		GUTIERREZ	GUTIEREZ	Low
Pitics'	PITICO	Low		SAPR SAN FRANCISCO DE ASIS	SUPER SAN FRANSICO DE ASIS	Low

Mexico Retail Market Overview

Total Stores by Customer: Supermarkets

			Only			
Logo	Customer	Income Lev Custome.	FOOD	Logo	Customer	Income Level Customers
Súper Willy's In hispanes y Maradeo	SUPER WILLY'S	Low		sumesa	SUMESA	Mid
Arteli	ARTELI	Low		COMERCIAL MEXICANA	AL PRECIO	Low
SUPER DEL NORTE.	SUPER DEL NORTE	Low		G MART	S-MART	Low
Kompras 😂	SUPER KOMPRAS	Low		city market	CITY MARKET	High
SUPERETTE Todo un super	SUPERETTE	Low		fresko ocomercial mexicana	FRESKO	High
Della Rica de Caracino	DEL RIO	Low		BODEGA Comercial Mexicana	BODEGA CM	Low

Mexico Retail Market Overview

Total Stores by Customer: Department Stores

Main Products:

- Clothes.
- Fashion Accessories.

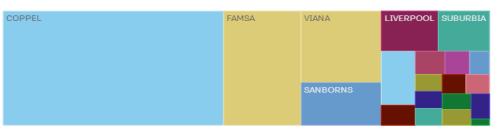
Opportunity:

Those Stores covers

Low, Middle and High Class

Depend on the Stores:

- Furniture
- Luggage
- Hardware



Logo	Logo Customer		Income Level Customers
LIVE POOL ES PARTE DE MI VIDA	LIVERPOOL	100	High
E Talacio de Hierro	PALACIO DE HIERRO	25	High
SEARS	SEARS	80	Mid
€ Coppel	COPPEL	1,100	Low
FAMSA	FAMSA	387	Low
Suburbia	SUBURBIA	90	Mid
Woolworth. Es para ti	WOOLWORTH	30	Low
Astricas de Francia	FABRICAS DE FRANCIA	20	Mid



Mexico Retail Market Overview

Total Stores by Customer: Price Clubs

Main Products:

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

Opportunity:

ALL CATEGORIES (Higher level products).

SAMS	COSTCO	CITY CLUB

Logo	Customer	Stores	Income Level Customers
Sams	SAMS	120	Mid
Costco	соѕтсо	34	High
Ellia	CITY CLUB	33	Mid



Mexico Retail Market Overview

Total Stores by Customer: Dollar Stores

Main Products:

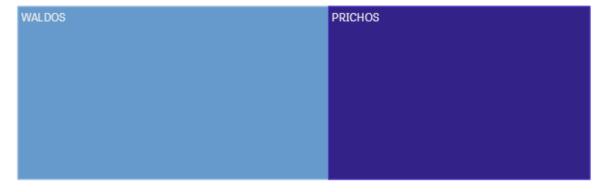
- General Merchandise.
- Toys.
- Cleaning Products.
- Fashion Accessories.

Opportunity:

Low Class

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

Logo	Customer	Stores	Income Level Customers
Tu primer opsila	WALDOS	380	Low
Photos	PRICHOS	320	Low





Mexico Retail Market Overview

Total Stores by Customer: Specialized

Logo	Customer	Stores	Income Level Customers
FARMACIAS SIMILARES' "LO MISMO PERO MAS BARATO"	FARMACIAS SIMILARES	4,000	Low
Super Farmocio	SUPER FARMCIA GUADALAJARA	1,200	Low
Farmacias del Ahorro. Te queremos bien.	FARMACIAS DEL AHORRO	1,030	Mid
benavides.	FARMACIAS BENAVIDES	360	Mid
C farmatodo. To Parmaccutto de Conflanza	FARMA TODO	102	Low
SUPERFARMACIAS EL FENIX	SUPERFARMACIAS EL FENIX	72	Low

Logo	Customer	Stores	Income Level Customers
farmacias KLYNS	FARMACIAS KLYNS	71	Low
MEDEX _X super farmacia	MEDEXX SUPER FARMACIA	70	Low
	FARMACIAS SAN PABLO	34	Low
esquivar.	ESQUIVAR	30	Low
GEN TRANSPORTE TO THE PARTY OF	FARMACIAS SAN FRANCISCO DE ASIS	30	Low

FARMACIAS SIMILARES

SUPER FARMCIA GUADALAJARA

FARMACIAS DEL HANCIAS BENAVIDES

FARMACIAS DEL HANCIAS BENAVIDES

Mexico Retail Market Overview

Total Stores by Customer: Specialized

Logo	Customer	Stores	Income Level Customers
<u>AutoZone</u>	AUTO ZONE	400	Mid
	REAFACIONARIA CALIFORNIA	130	Mid
REFACCIONARIAS DEL VALLE	REFACIONARIAS DEL VALLE	83	Mid
	MERCADO DE REFACIONES	22	Mid

Logo	Customer	Stores	Income Level Customers
A CONTRACTOR OF THE PARTY OF TH	HOME DEPOT	107	Mid
LOWE'S	LOWE'S	11	High







Mexico Retail Market Overview

Total Stores by Customer: Specialized

Logo	Customer	Stores	Income Level Customers	Logo	Customer	Stores	Income Level Customers
OfficeMax	OFFICE MAX	255	Mid	≈elektra	ELECTRA	200	Low
Office DEPOT	OFFICE DEPOT	100	Mid	STEREN Soluciones en electrónica	STEREN	100	Mid
SUPER PAPELERIAS	TONY SUPER PAPELERIAS	70	Low	RadioShack.	RADIO SHACK	70	High
OFOX Supertiendas de oficinas	OFIX	21	Low	BEST	BEST BUY	10	High
HE COMMITTEE TO A COM	ADOSA	5	Low	accessives originates shop)	MOBO Shop	200	Mid
OFFICE MAX	ffice Supp	office DEPOT	TONY SUPER OFIX PAPELERIAS	ELECTRA	Electro	nics	RADIO SHACK

Mexico Retail Market Overview

Total Stores by Customer: Specialized

Logo	Customer	Stores	Income Level Customers	Logo	Customer	Stores	Income Level Customers
Ingenia	INGENIA MUEBLES	85	Mid	DEVLYN D	DEVLYN	110	Mid
THE HOME STORE	THE HOME STORE	17	High	Confiança a la vota:	OPTICAS LUX	90	Mid
BED BATH &	BED, BATH & BEYOND	10	High				
almacenes ANFORA (Com De Cocon. y Alap Min)	ALAMCENES ANFORA	33	Mid	+KOTA	MASKOTA	311	Mid
Anforama Todo para mi Cocina.	ANFORAMA	30	Mid	petco	PETCO	5	High
INGENIA MUEBLES		MCENES ANFORA A	INFORAMA THE HOME STORE	CRILYN	OPTICASLUK	MASKOTA	



Pet Supplies

Eyeglasses

Home Supplies

THANKS

