






THE FMCG RETAIL BUSINESS IN THE '20S

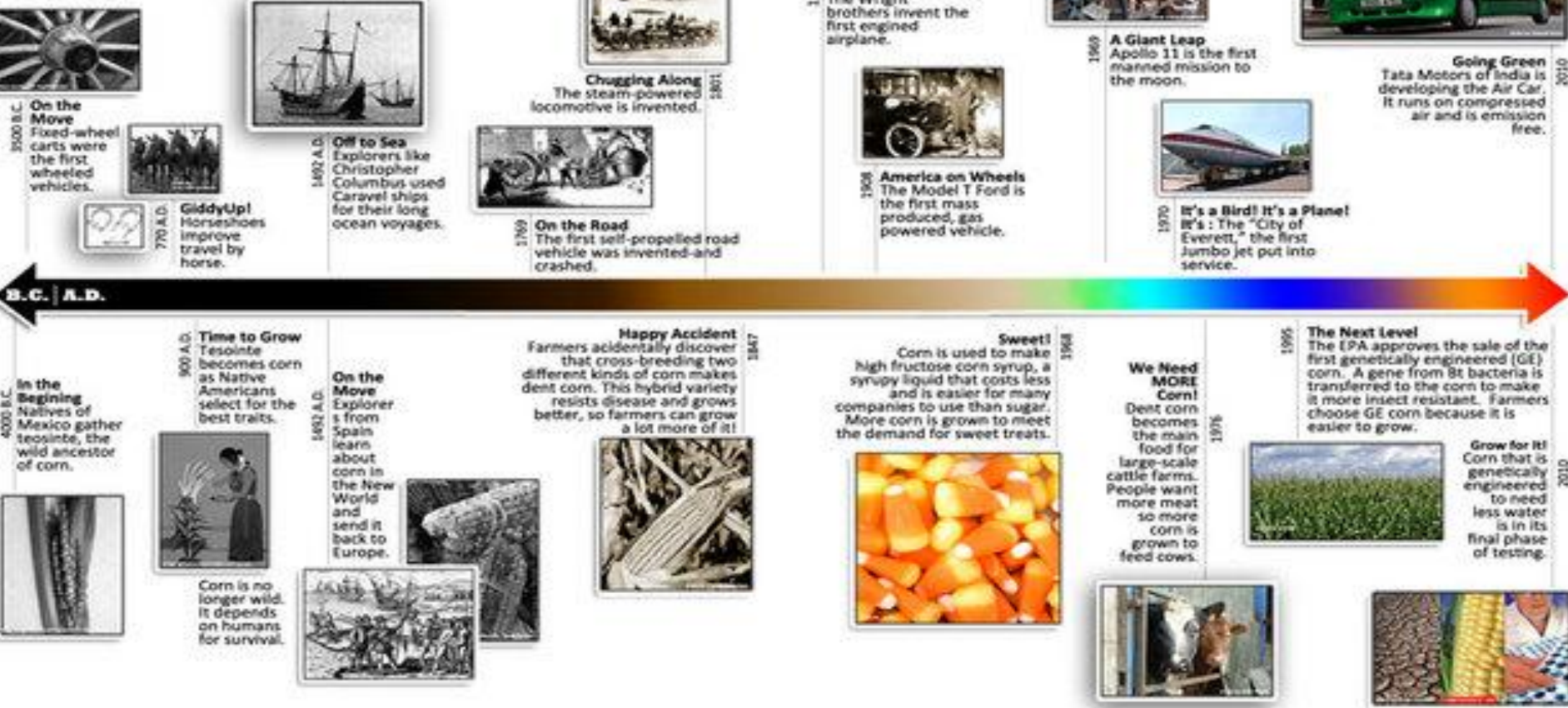
ΛΕΥΤΕΡΗΣ ΚΙΟΣΗΣ
ΓΕΝΙΚΟΣ ΔΙΕΥΘΥΝΤΗΣ ΙΕΛΚΑ



	Original State	1 st Disruption	2 nd Disruption (Sustaining Innovation)	3 rd Disruption	4 th Disruption
Timeline	Before 1900s	1900-1940	1940-1970	1970-1990	1990 to Present
Profitability	GM=45% Turn=2.5x ROI=113%	GM=40% Turn=3x ROI=120%	GM=40% Turn=3x ROI = 120%	GM= 23% Turn=5x ROI=115%	GM=5% Turn=25x ROI=125%
Retailer Types	Specialty Stores Aka Local Corner Stores 	1. Department Stores Aka General Merchants  Example: Macy's Marshall Fields 2. Catalog Retailers	1. Malls Aka Strip Centers, Mass  Example: Gap, Malls 2. Specialty Catalogs	Discount Dept Stores Aka Category Killers, Value  Example: Costco, Kmart, Target ▪ Also include specialty discount stores – HomeDepot, Staples, Toys R Us, FutureShop etc.	Internet Retailing Aka e-commerce  Example: Amazon, eBay, Dell ▪ Introduced "Navigation" as a business where business can become affiliated with the customer by providing info.
Business Model	<ul style="list-style-type: none"> ▪ Higher service, high inventory, high prices, and local knowledge. ▪ <u>Shopping Experience</u>: Behind-the-Counter 	<ul style="list-style-type: none"> ▪ lower service, lower prices ▪ <u>Shopping Experience</u>: Self-Service Shopping Cart ▪ <u>Enabling Technology</u>: Railroad (department stores) and Rural Free Mail Delivery (Catalog Retailers) ▪ <u>Product Selection</u>: Standard Products 	<ul style="list-style-type: none"> ▪ Targeted selection ▪ <u>Shopping Experience</u>: Suburban Life ▪ <u>Enabling Technology</u>: Automobile ▪ <u>Product Selection</u>: Mass Market Products 	<ul style="list-style-type: none"> ▪ lower service, lower prices ▪ <u>Shopping Experience</u>: One-Stop Shopping ▪ <u>Enabling Technology</u>: Computer Systems, Distribution Systems, and Vendor Management ▪ <u>Product Selection</u>: Commoditization (global megabrands) and private brands 	<ul style="list-style-type: none"> ▪ <u>Shopping Experience</u>: Online Virtual Shopping and Services ▪ <u>Enabling Technology</u>: Internet and Navigation-as-a-business. ▪ <u>Product Selection</u>: Infinite and Customization

Getting There

Technology makes our lives easier and more enjoyable. You are familiar with how transportation has changed to be faster and safer. Agriculture has also had tremendous changes. These changes have allowed fewer farmers to grow more food. Check out this timeline comparing the changes in transportation to the changes in growing corn.



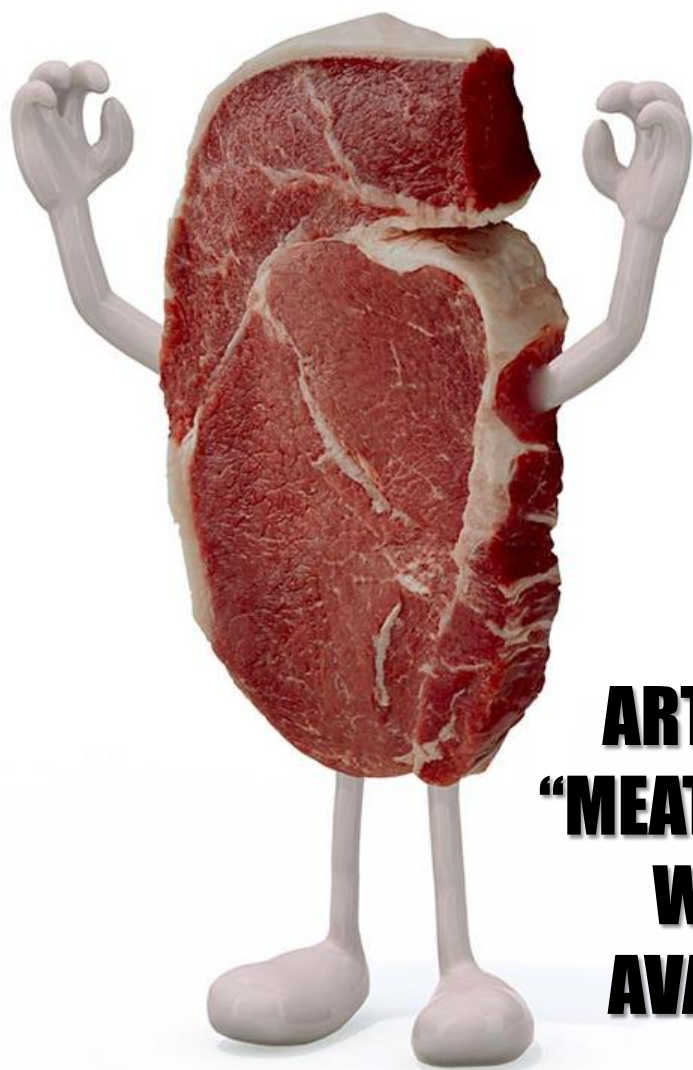
THE WORLD IN 2030

- Population: 8,5 billion
- Food consumption: +50%
- Energy consumption: +45%
- Water consumption: +30%
- 70% will live in cities
- Population of China: 1,4 billion
- Population of India: 1,5 billion
- Average age in the West (25% of world population): 44 years
- Average age in the developing world (75% of world population): 32 years

**CLIMATE
CHANGE
TARGETS WILL
HAVE BEEN
MISSED EVERY
YEAR SINCE
2017**

**BY 2030
THERE WILL BE
AREAS ON THE
PLANET THAT
BECOME NO-GO
AREAS BECAUSE
POLLUTION IS SO
BAD**

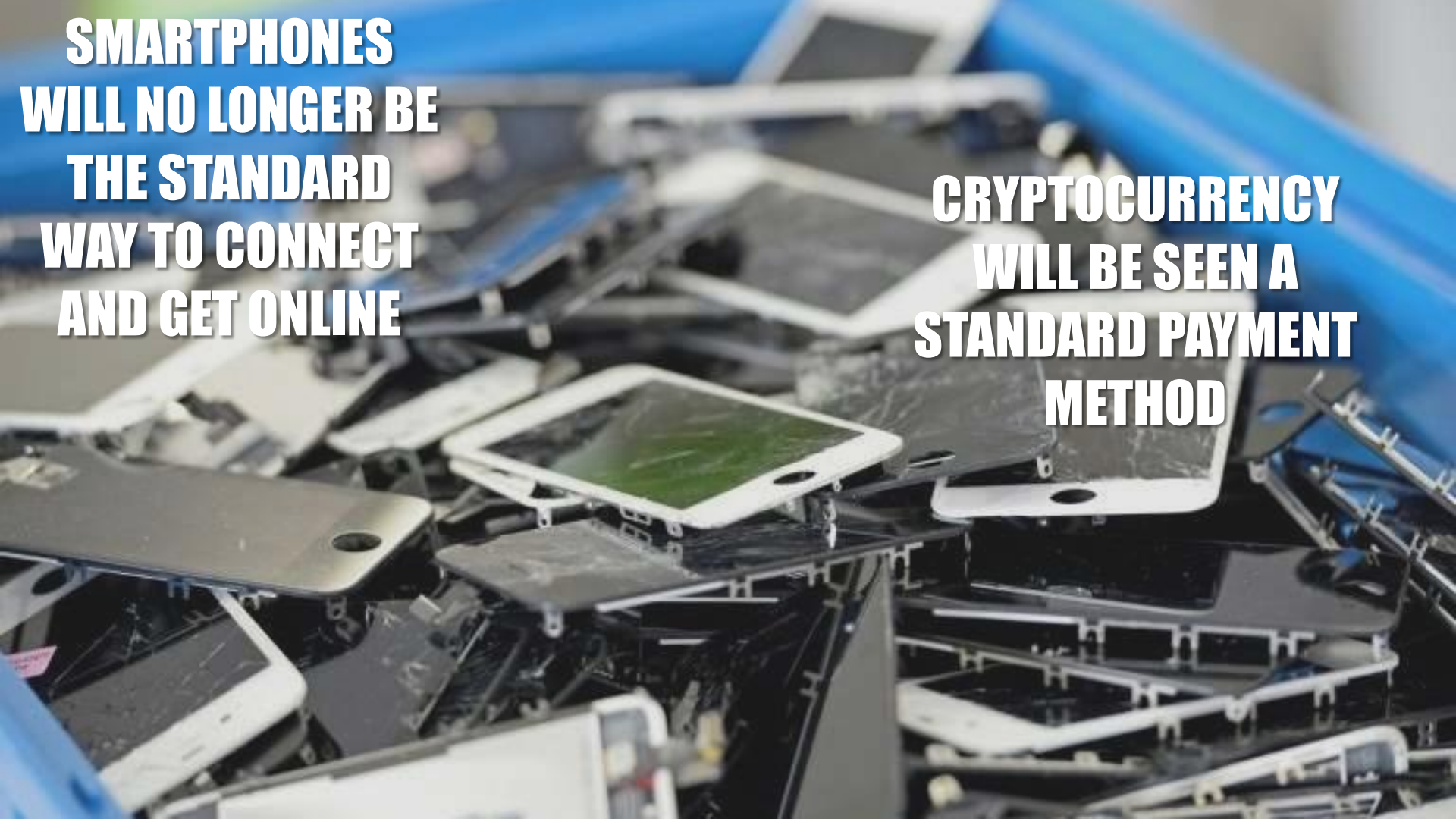




**ARTIFICIAL
“MEAT” WILL BE
WIDELY
AVAILABLE**



**VEGANISM
WILL BE
PREVALENT**



**SMARTPHONES
WILL NO LONGER BE
THE STANDARD
WAY TO CONNECT
AND GET ONLINE**

**CRYPTOCURRENCY
WILL BE SEEN A
STANDARD PAYMENT
METHOD**



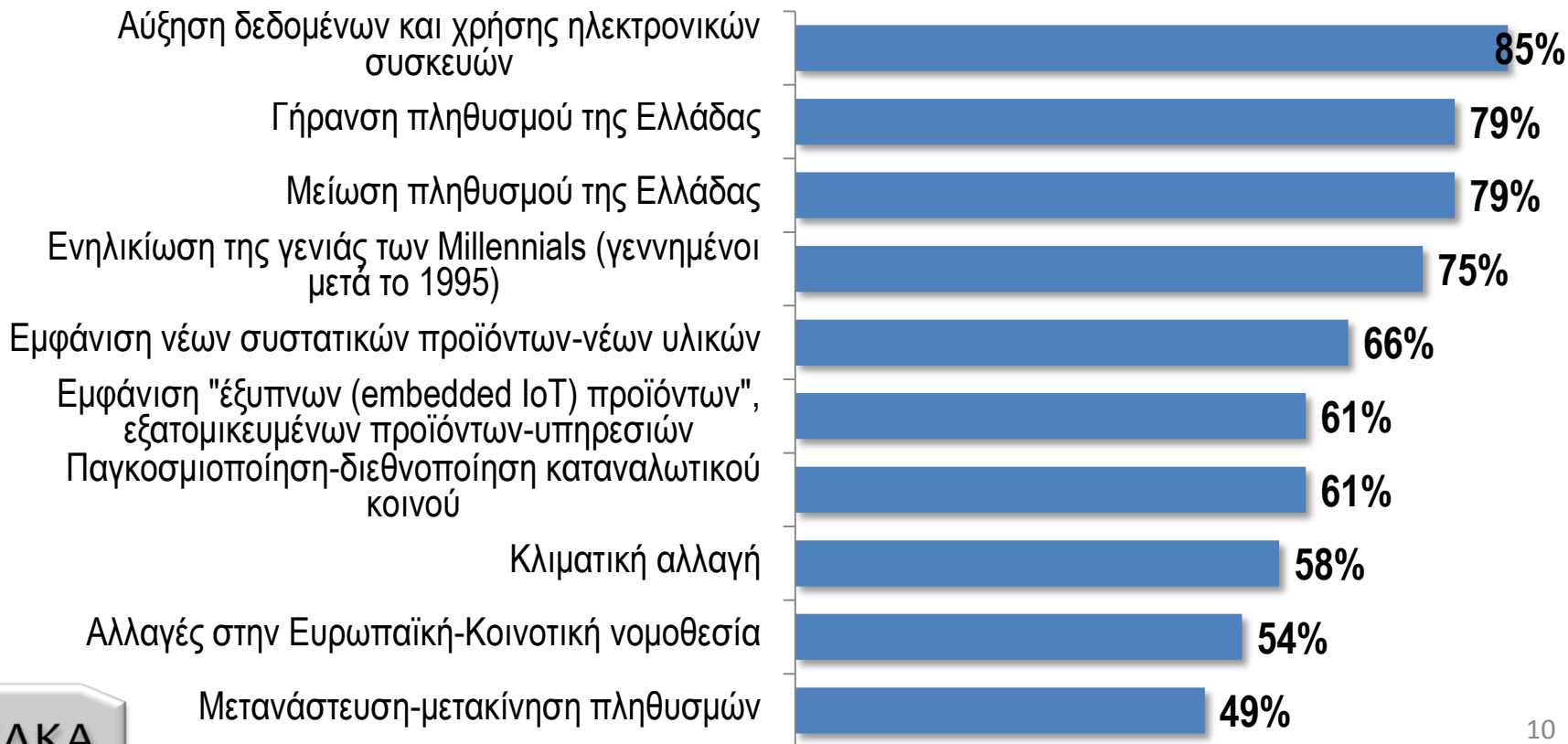
**ARTIFICIAL INTELLIGENCE
WILL AUTOMATE MUCH OF
THE HEALTHCARE
DIAGNOSTICS**

**ROBOTS WILL
OFFER
COMPANIONSHIP**



**EVERYTHING WE BUY AND
EVERYTHING WE USE WILL BE
CONNECTED TO THE INTERNET OF
THINGS AND PROVIDE TRILLIONS
UPON TRILLIONS OF DATA POINTS**

ΤΙ ΠΙΣΤΕΥΟΥΝ ΤΑ ΣΤΕΛΕΧΗ ΤΗΣ ΕΛΛΑΔΑΣ



ΠΡΟΒΛΕΨΗ 1: Η ΔΥΝΑΜΗ ΤΗΣ ΠΡΟΔΡΑΣΤΙΚΟΤΗΤΑΣ



ΠΡΟΒΛΕΨΗ 2: ΟΙ ΑΓΟΡΑΣΤΙΚΕΣ ΕΜΠΕΙΡΙΕΣ ΕΙΝΑΙ ΣΥΓΚΕΚΡΙΜΕΝΕΣ ΚΑΙ ΌΧΙ ΓΕΝΙΚΕΣ

JESICA

FUN CASUAL



MONICA

MODERN CHIC



ΠΡΟΒΛΕΨΗ 3: Η ΙΔΙΟΚΤΗΣΙΑ ΑΥΤΟΚΙΝΗΤΩΝ ΜΕΙΩΝΕΤΑΙ



**ΠΡΟΒΛΕΨΗ 4:
ΤΟ ΝΑ ΑΓΟΡΑΖΕΙΣ
'ΟΤΙ ΘΕΛΕΙΣ
'ΟΠΟΥ ΘΕΛΕΙΣ
'ΟΠΟΤΕ ΘΕΛΕΙΣ
'ΟΠΩΣ ΘΕΛΕΙΣ
ΕΙΝΑΙ ΚΑΝΟΝΙΚΟΤΗΤΑ**



ΠΡΟΒΛΕΨΗ 5: ΤΑ ΚΑΤΑΣΤΗΜΑΤΑ ΓΙΝΟΝΤΑΙ SHOWROOMS, ΚΕΝΤΡΑ ΔΟΚΙΜΗΣ ΚΑΙ ΚΕΝΤΡΑ BRAND



ΠΡΟΒΛΕΨΗ 6: ΤΟ PURE PLAY ΔΕΝ ΑΠΟΤΕΛΕΙ ΣΗΜΑΝΤΙΚΟ ΜΕΡΟΣ ΤΟΥ ΛΙΑΝΕΜΠΟΡΙΟΥ





**ΠΡΟΒΛΕΨΗ 7:
ΤΑ ROBOTICS
ΑΝΤΙΚΑΘΙΣΤΟΥΝ
ΠΟΛΛΕΣ ΔΟΥΛΕΙΕΣ
ΣΤΟΝ ΚΛΑΔΟ ΤΟΥ
ΛΙΑΝΕΜΠΟΡΙΟΥ**

ΠΡΟΒΛΕΨΗ 8: Ο ΑΝΤΑΓΩΝΙΣΜΟΣ ΓΙΑ ΤΟ ΔΙΑΘΕΣΙΜΟ ΕΙΣΟΔΗΜΑ ΤΩΝ ΚΑΤΑΝΑΛΩΤΩΝ ΕΧΕΙ ΑΥΞΗΘΕΙ



**Change is the law of life.
And those who look only to
the past or present are
certain to miss the future.**

- John F. Kennedy

