

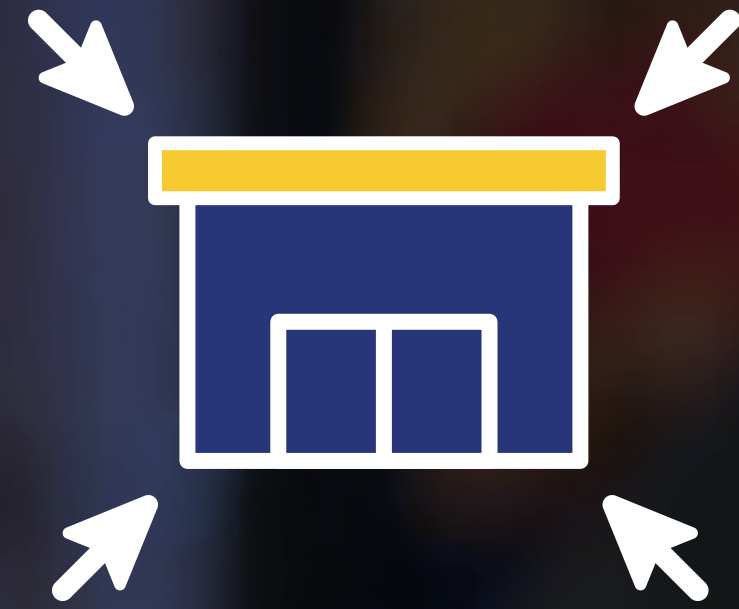


WHAT'S *in* STORE

DISCOUNT CHANNEL

THE DISCOUNT CHANNEL





**SMALLER
STORES**



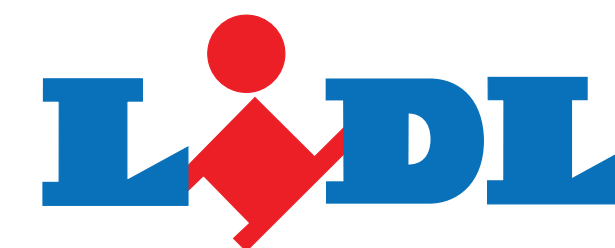
**LIMITED
ASSORTMENTS**



**PRIVATE LABEL
PRODUCTS**

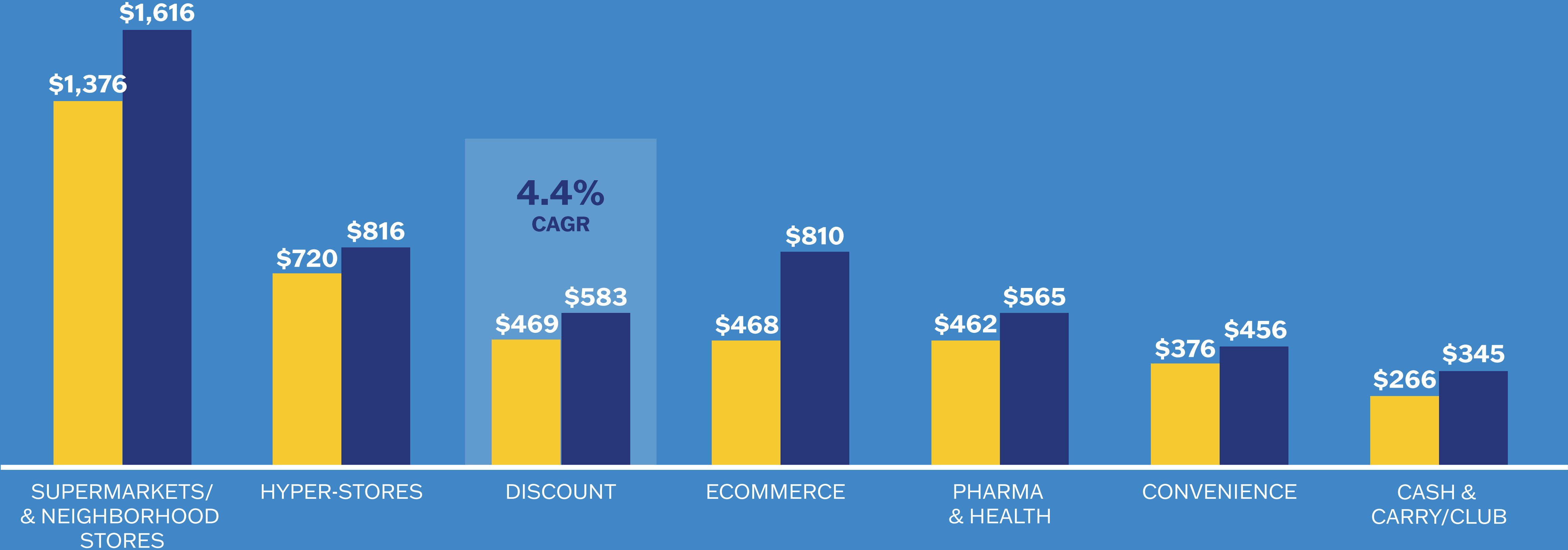


**SMALLER PACK SIZES
AT LOW PRICES**



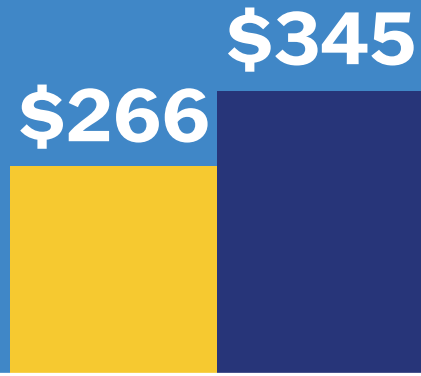
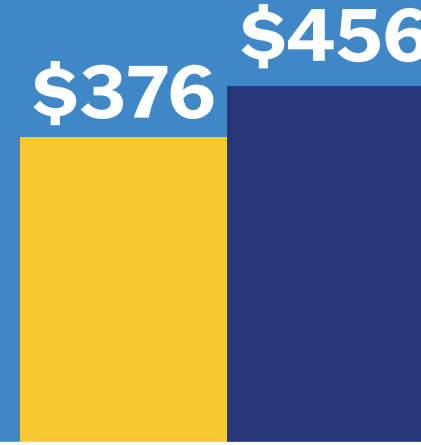
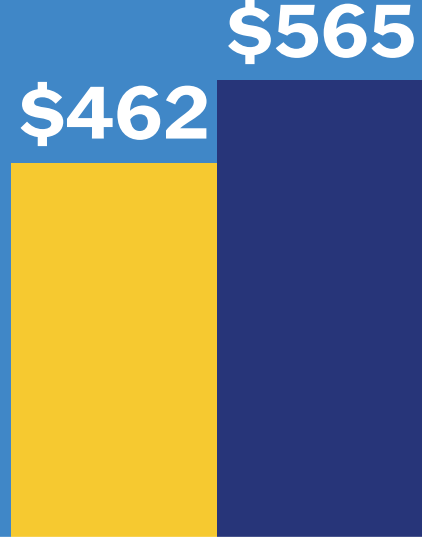
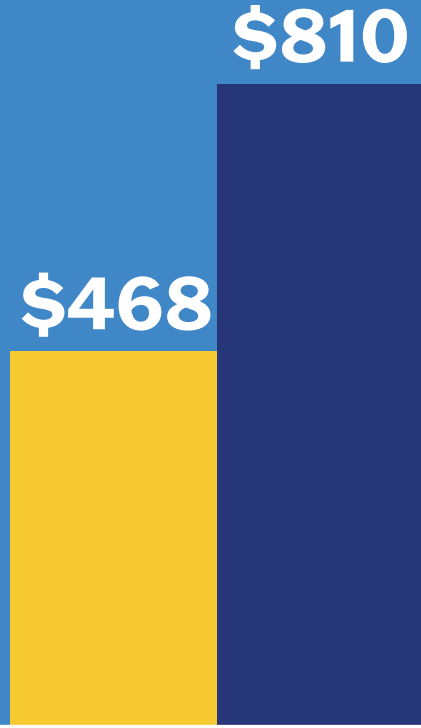
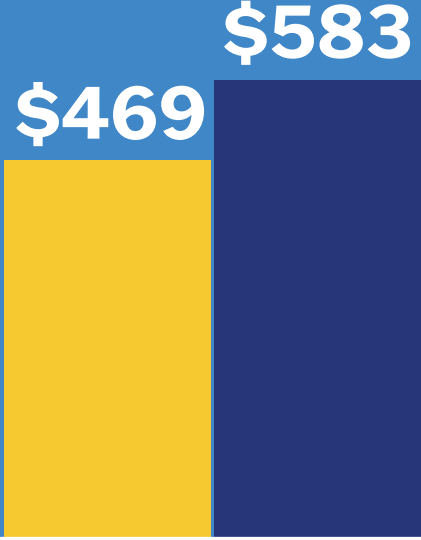
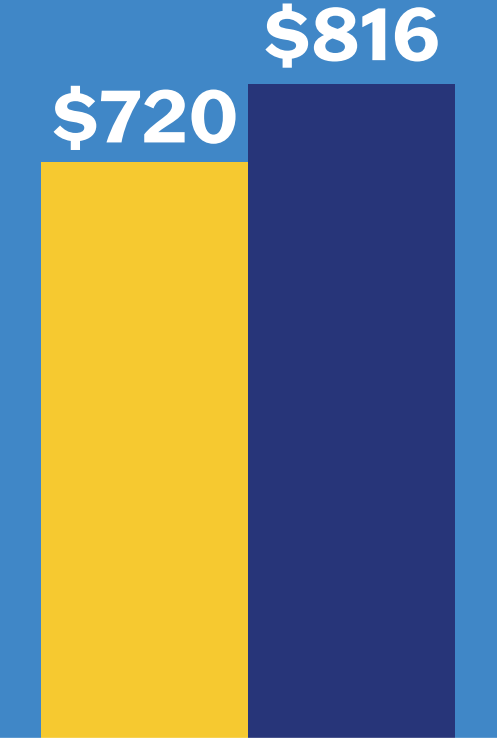
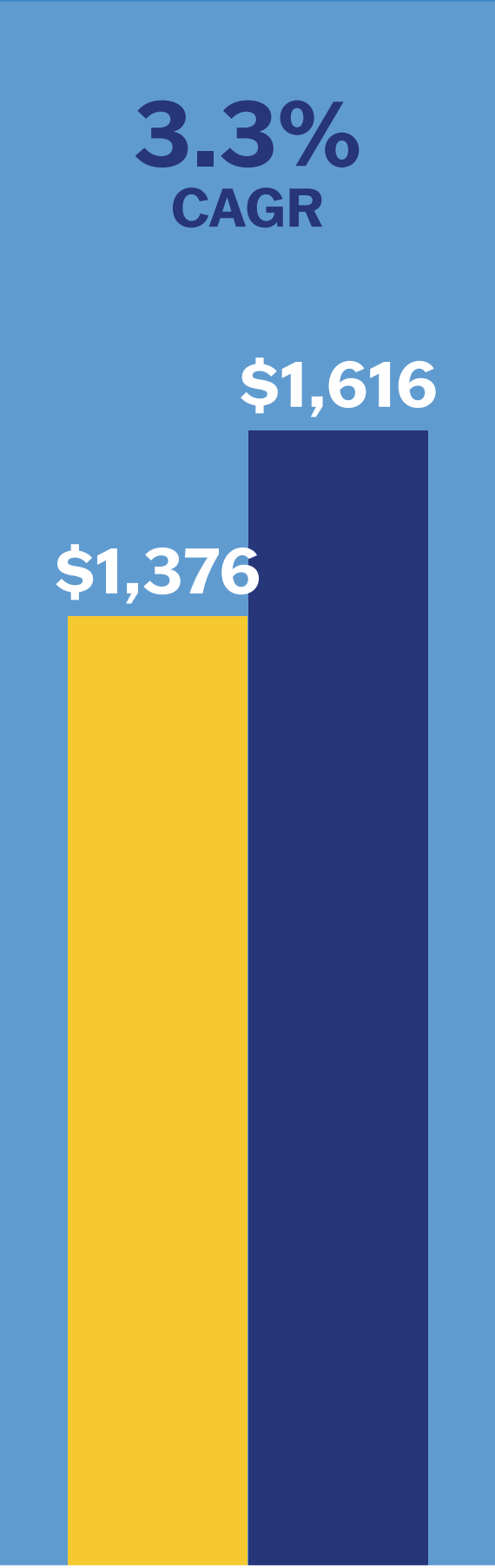
TOTAL GLOBAL GROCERY SALES BY CHANNEL 2021 - 2026, (USD bn)

2021 SALES 2026 SALES



TOTAL GLOBAL GROCERY SALES BY CHANNEL 2021 - 2026, (USD bn)

2021 SALES 2026 SALES



SUPERMARKETS/
& NEIGHBORHOOD
STORES

HYPER-STORES

DISCOUNT

ECOMMERCE

PHARMA
& HEALTH

CONVENIENCE

CASH &
CARRY/CLUB

A man in a green jacket is scanning items at a self-checkout station in a grocery store. The station is red and has a monitor and a scanner. The background shows shelves of products. The text "ENHANCEMENTS & TRANSFORMATIONS" is overlaid in white on a dark blue background.

ENHANCEMENTS & TRANSFORMATIONS

FULFILLMENT CAPABILITIES



Contactless
curbside
pickup.



DOLLAR GENERAL HAS
17,000 **CLICK & COLLECT**
LOCATIONS



**MOST STORES OFFERING
HOME DELIVERY TO
OVER 90% OF CONSUMERS**



DELIVERY PARTNERSHIPS

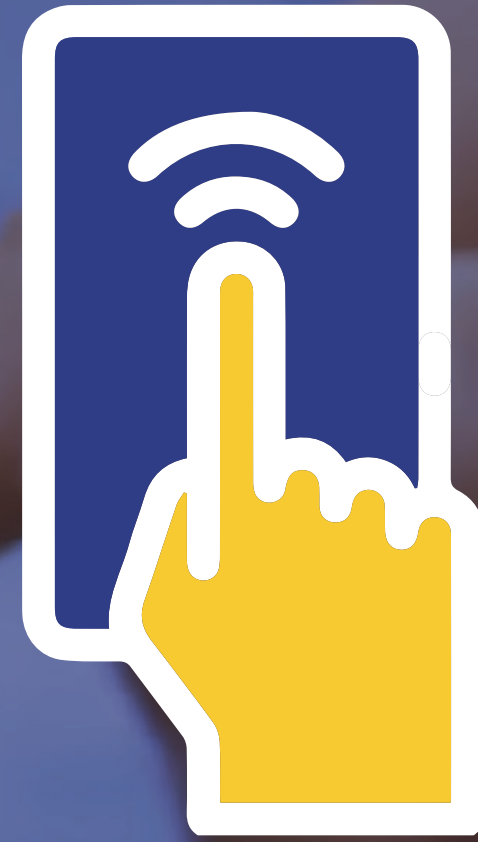


**FAST &
FRICTIONLESS
CHECKOUT**





**ALDI TRIALING FIRST
CHECKOUT-FREE STORE
IN UK & LONDON**



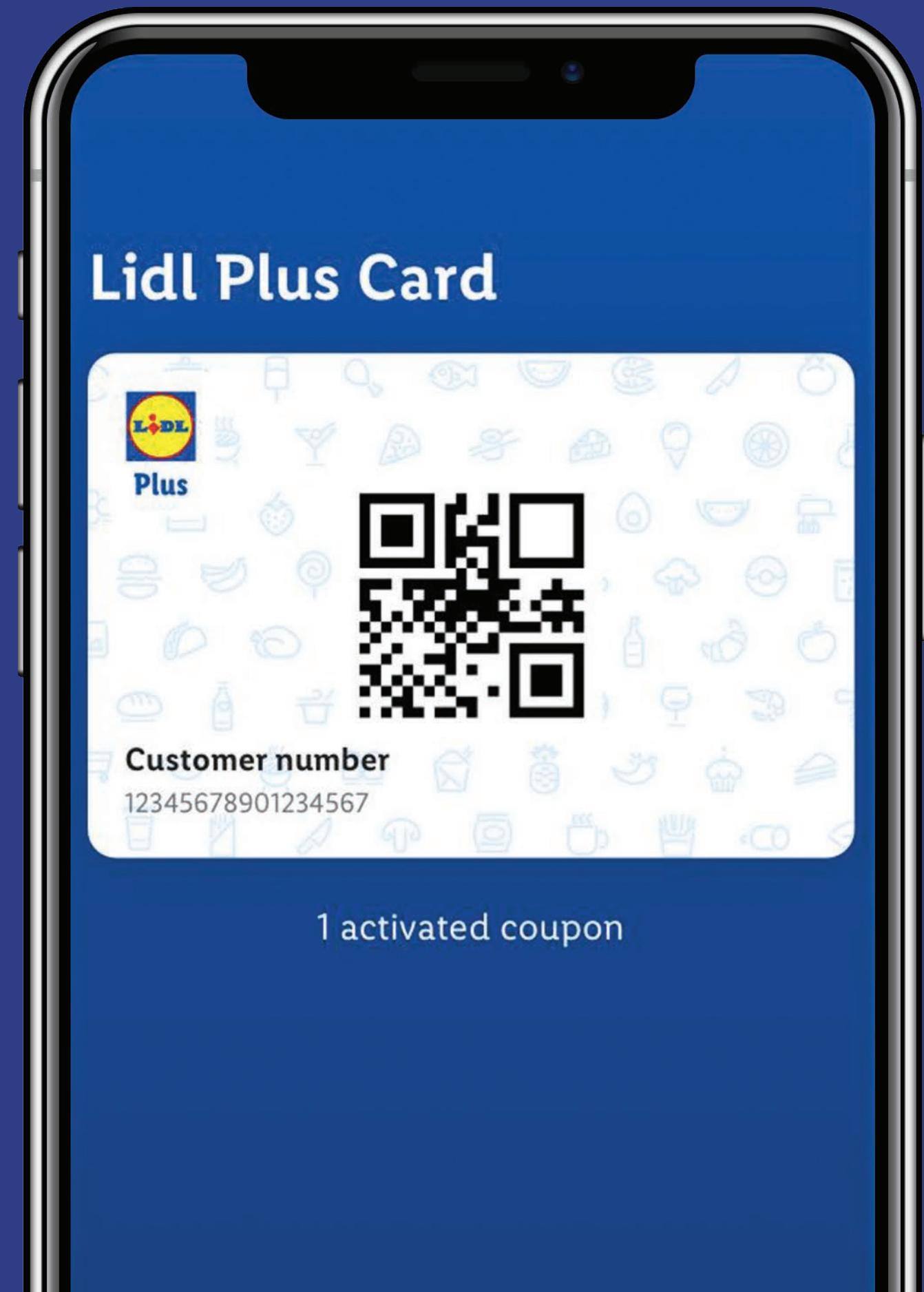
**BIEDRONKA ROLLED OUT
SELF-CHECKOUT
IN 116/159 STORES**

DIGITIZED CUSTOMER EXPERIENCES





LIDL LAUNCHES 'LIDL PLUS'





DOLLAR TREE LAUNCHES NEW MEDIA NETWORK



CHESAPEAKE
Media Group



DOLLAR GENERAL LAUNCHES POPSHELF



FUTURE OF THE DISCOUNT CHANNEL



ACCELERATION OF EXISTING TRENDS

1

Expanding online delivery and pickup networks, via **intermediary partnerships**

2

Increasing digitization of **loyalty programs**

3

In-store mobile integration for engagement and payment

NEW & EMERGING TRENDS

1

Trip consolidation
resulting in less
frequent, but larger
shopping baskets

2

Experimental
**cashier-less store
concepts** emerge

3

Data-driven,
personalized
**digital media &
advertising**