

Retailers' Perspective

The changing retail landscape, are local players gearing up?

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6 April 2017

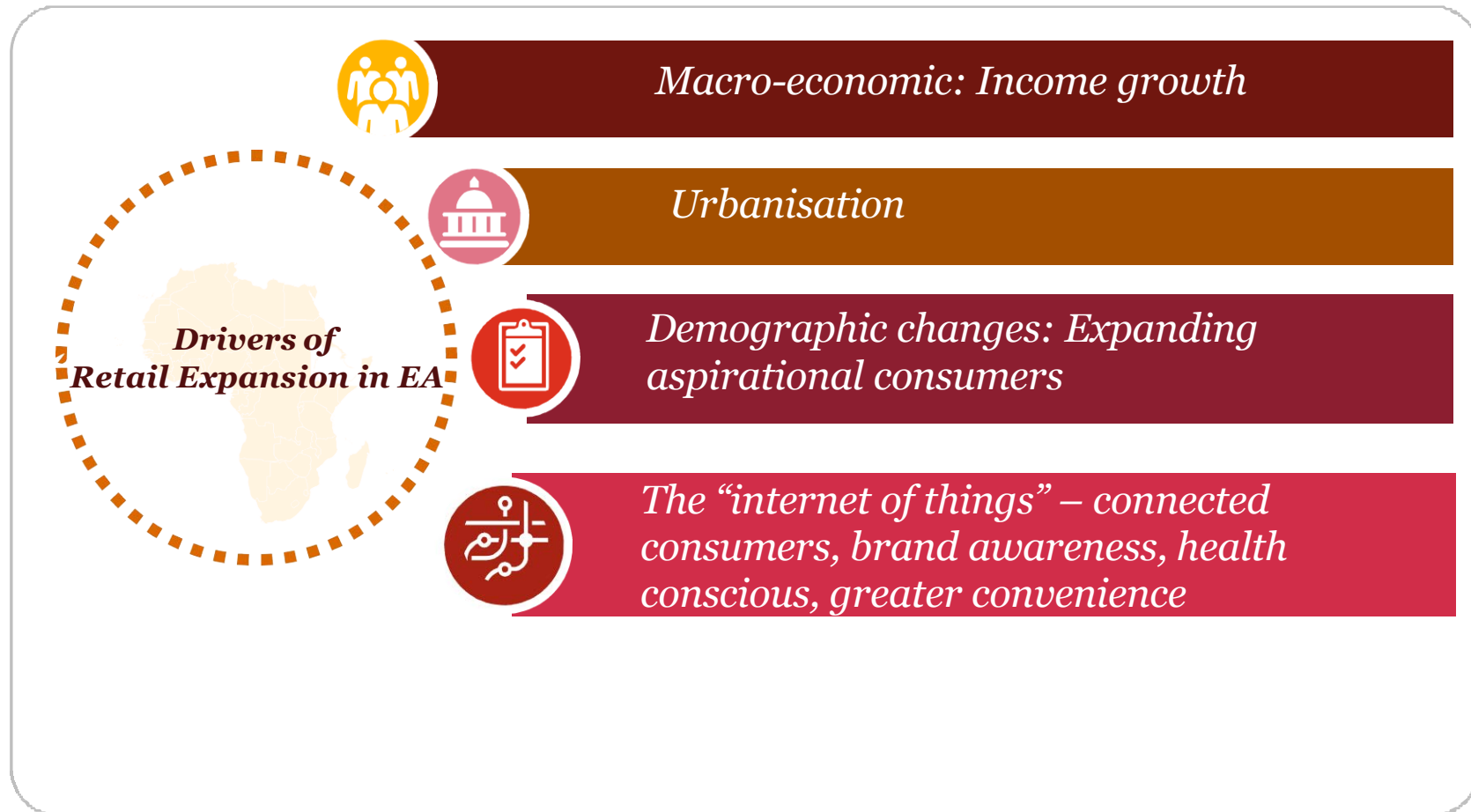


Agenda

1. Introduction
2. Home-grown champions making their mark
3. Challenges in the sector



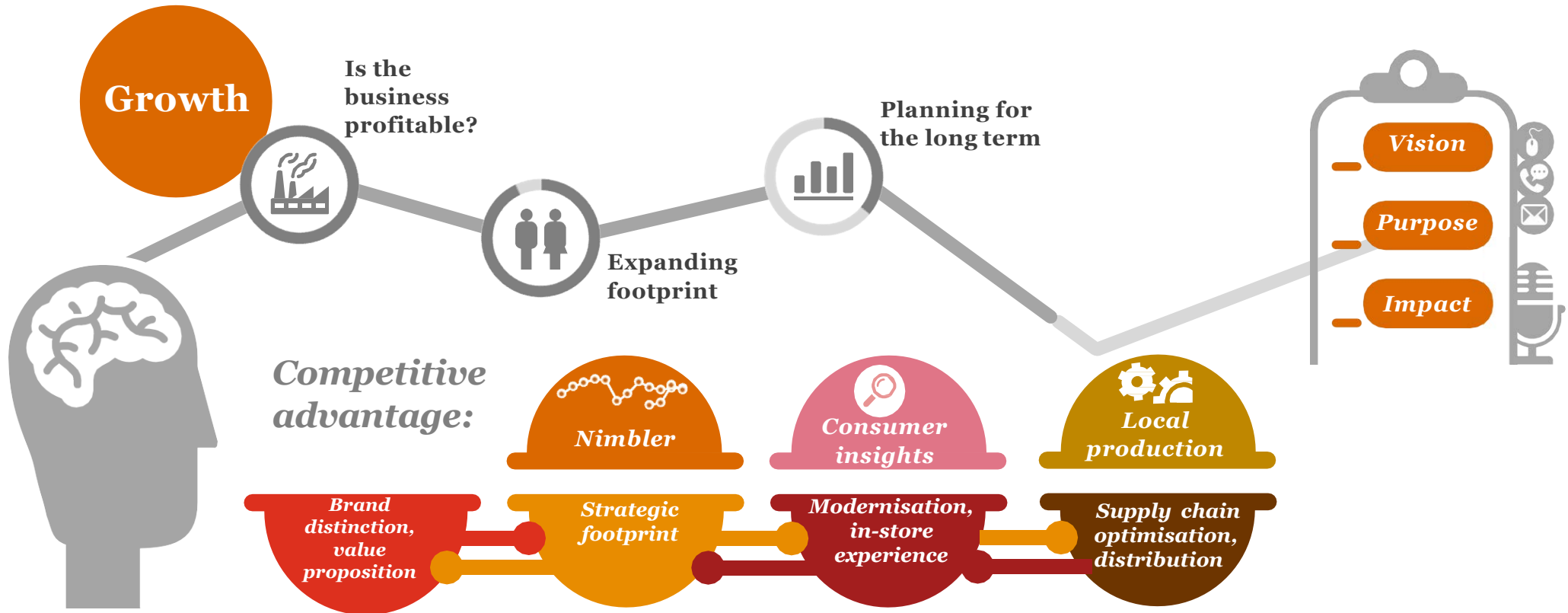
Mega trends driving retail and consumer expansion in the East Africa region





Home-grown champions

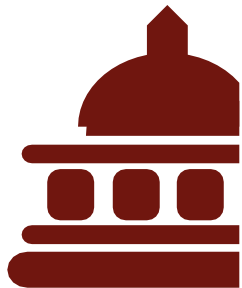
What are the key differentiators?





Challenges

“Home-grown operators are none the less increasingly claiming their turf”



Family owned businesses; professionalisation, governance, “the missing middle”



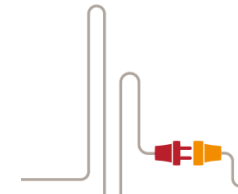
Dominant informal sector



Cost of formal retail space



Supply chain and supplier capacity constraints



High distribution costs



Operational efficiencies

End

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