



FORMAL INDEPENDENT TRADE IN SOUTH AFRICA

Providing manufacturer's with insight into South Africa's formal independent grocery trade channel, its major buying groups & the opportunities & challenges it presents

A Channel in Transition

The current economic and trading environment has had a fundamental impact on FMCG retailers and wholesalers, how they trade and on who is winning and who is losing. Of significance has been the consolidation and growth of the independent buying groups and the transition of business models to effectively respond to shopper demands and market pressures.

The Ti Formal Independent Grocery Channel Report provides manufacturer's with actionable information that will enable you to build informed and aligned customer business plans, change immediate relational behaviour with your independent trade customer, and drive short to medium term market share gains.

Benefits of the Report

- **Understand the macro trends** impacting wholesale / buying group behaviour and the associated impact on suppliers and other key stakeholders
- Identify the resulting **implications and opportunities** for your business
- **Gain insight into the key players** and their estimated contribution to the channel
- Build a **relevant route-to-market strategy** and customer business plan
- **Fast, easy access** to a ready-to-use insight and image-rich PPT report

Report Content

Evolution of the Independent route-to-market

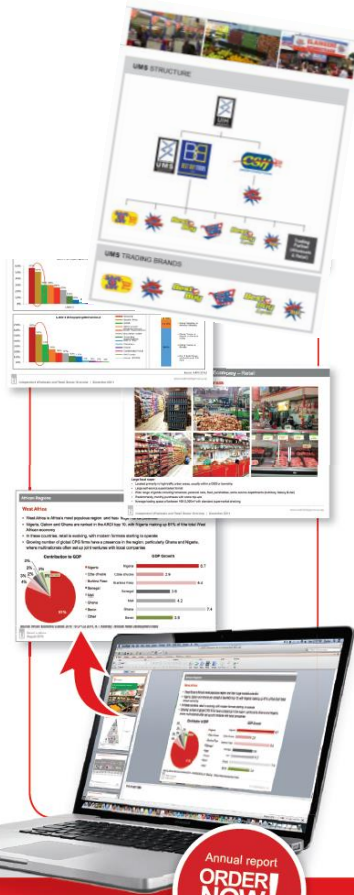
- The South African FMCG Route-to-Market:
 - Where have we come from?
 - Where are we today?

Formal Independent Wholesale – a channel in transition




















- Estimated relative size, scope and growth of the Formal Independent Trade channel in South Africa, taking into account turnover, store footprint and supplier alignment

Key trends, Impacts and Opportunities

- A clear perspective on how Independent trade players are responding to current market dynamics, pinpointing the implications and opportunities for consumer goods manufacturers

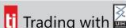




	 UIH <small>UMS INVESTMENT HOLDINGS (Pty) Ltd</small>	 THE B.E.C.			
SOME OF THE MEMBER BRANDS	 	  	  	 <small>YOUR STYLE • YOUR STORE</small>  <small>Our goal you must score</small> 	   
NUMBER OF MEMBER STORES *	Network of over 300 independently owned supermarkets, wholesalers and hybrid outlets	Network of over 170 independent retail and wholesale operators	Network of over 220 independent, wholesale, retail and distribution outlets	Network of over 250 independent, wholesale, retail and distribution outlets	Network of 70 wholesale stores and over 650 independent buying group members

*Note numbers have been rounded

Find out how these major players are both influencing, and responding to, the trends & developments driving the Formal Independent Trade Channel & it's Buying Groups



UMS + BEST BUY
South Africa 65%
Africa 35%


Focused on redefining current thinking in the independent space + ensuring UIH remains ahead of the market in terms of innovation for growth

Over 150 National Promotions annually

Global affiliation through the UMS / IGA PARTNERSHIP

Trading in 5 African countries

Access to 25,000 stokvels through the UMS Stokvel Programme




ICC BUYING GROUP

UNtrade Investment Holdings Formed

November 2017 - UMS restructures its business into a consolidated holding company to be known as UMS Investment Holdings (UHS) Ltd

- Create a more cohesive group across all facets of wholesale and retail
- Allow UMS to maintain & build the company ethos and value system which remains its pillar and foundation



LSM 2-6

CUSTOMERS
include independent general dealers, traders, hawkers, vendors and consumers

GAUTENG DC fully operational

UMS BRAND RELAUNCH
Crown Mince opening paved the way for

STRATEGIC FOCUS
on transparent supplier, inventory and customer partnerships

SIGNIFICANT MEMBER
own-relationship and redistribution capacity

LSM 2-6

JUMBO

MASSCASH

POWER STORE

THINK HOME

Roots Butchery

GOAL

lifestyle

DEVLAND

Varona

TUP

Trade Zone

Food Zone

Liquor Zone

Power Trade

Best Buy

UIH

For more information on the Independent Channel, please contact:
Thobeka Magubane
 +27 (31) 303 2803 | info@tradeintelligence.co.za
 or visit www.tradeintelligence.co.za

An invaluable Key Account Managers Customer Business Planning tool