Retail Strategy for emerging markets Adapt or Diel

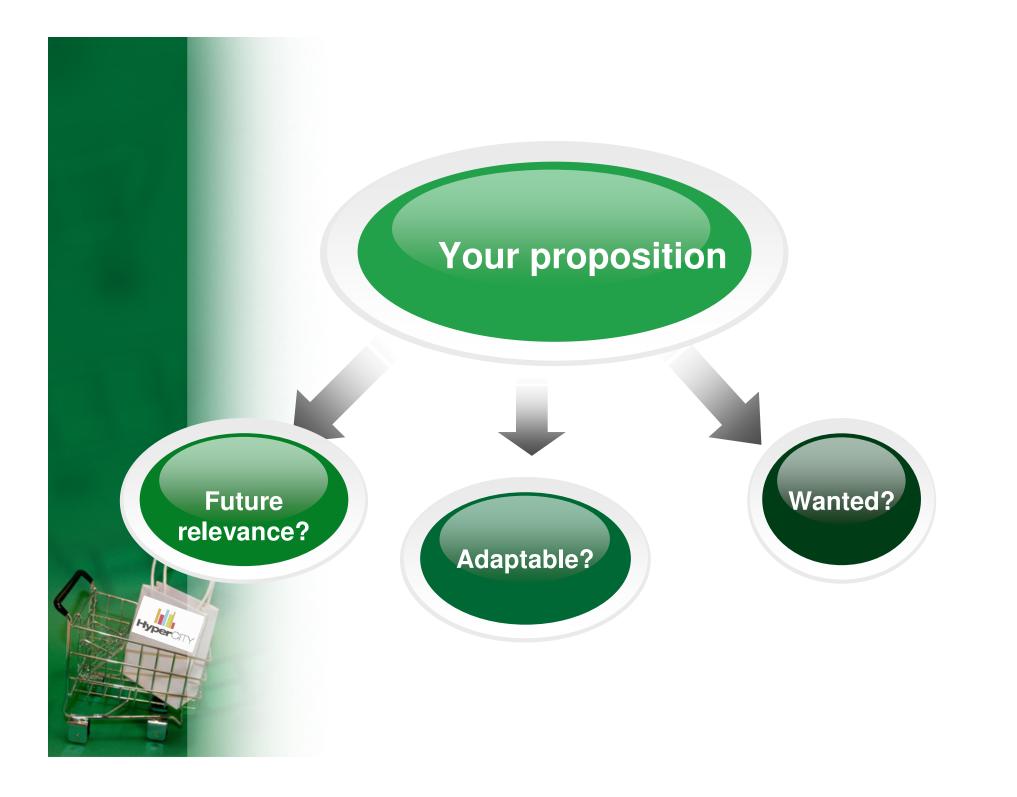
Hype

RULE NUMBER ONE

• There are no rules







Emerging market differentiators (India)

- Age group 50% population under age 25
- Projected increase in working population
- Increase in double income house holds
- Emerging larger income groups
- Increasing relevance of urban India
- Lack of alternate leisure activity



Our emerging consumer

- Increase in willingness to pay if the offering is differentiated
 - Bottled Tap Water, Mineral Water, Flavoured Mineral Water
- Convenience a new mantra
 - Processed food, ready to eat food, pre cut & packed food
 - Differentiated shopping experience for monthly purchase and regular top-up purchase
- Experimental

SPO I

- Occasional luxury is good
- Value for Space and Time

Our new 'spenders'

- Family visitors
- Psuedo shoppers
- The sitters
- The in-store consumer
- The celebs
- The playground seeker



Other visitors

- The tourist bus
- The picnicker
- The opportunist
- The Gamer
- The competitors
- The authority

