



# Europe's **Non-Food/ Variety** Discounters

Part of the Retail Cities' **Value Discounter Nextellence** Workshop Series



When: **December 11th, 10:00CET/09:00GMT**

Where: **Zoom Webinar**, pre-registration at least 24-hours prior to start required

Did your organization achieve its volume growth targets in 2024?

What's your outlook for 2025 – do you think you'll have an easy time selling more units in the next 12-month planning cycle?

The value discounter channel in Europe is increasingly pan-European, its composed of a diverse set of international and local operators, and it is growing per SKU volumes at levels unmatched by any other class-of-trade in European physical retail.

Getting the **STRATEGY** right for this channel is **STEP 1**, getting the **RESOURCES** to lift per SKU volumes is **STEP 2**. **The hard work, STEP 3** – getting the plan and resources **ALIGNED** and realigned across 2025 – is where **Retail Cities** will help you on your journey.

## Two challenges remain **formidable**:

1. Finding the right SKUs to align with the channel's desired price points
2. Cross-border coordination.

This session will provide an update on the channel and how it will shape in 2025/26, profiling key retailers. It will also provide best practical advice on how to win with the right pack and promo. Companies that sign-up for a 2025/26 **Discounter Channel Nextellence Journey** will also receive expert assistance getting the plan and resources aligned and realigned across 2025.

Join the **Retail Cities'** panel of **Variety Discounter experts** for a 2.5-hour discussion on what the future of the **Variety Discount Channel** will look like in Europe as it evolves over the next five years. Most importantly, make sure to follow our step-planning guide to help you recalibrate for success: What the next wave of competition in the channel looks like, how this will impact SKU and volume growth strategies, and what resources are required to **align for success**.

Contact Desiree Fung to find out if your company is already registered OR you need assistance getting registered.

**REGISTER HERE** >>>

The Retail Cities' **Value Discounter Nextellence** Workshop Series

## Kickoff Session - Variety Discounters in 2024

by **RAY** Gaul

Ray Gaul, Retail Cities President, will start the discussion with a recap of how three big changes in the ways Variety Discounters compete for consumers defined the year 2024. Each presenter will then address these changes in more detail in the three featured discussions for this year's workshop.

1. **PRICE MATCH.** Lidl began directly calling out Action in its weekly communications with shoppers. How will this change Action's approach in 2025/26?
2. **SHE.MU.TOK.** Chinese direct importers – Shein, Temu, and Tik Tok and others – began targeting and re-targeting consumers that shop regularly at Action using geolocation and other technique to know the consumer better than she knows herself. How will this change the channel and consumers?
3. **LOCALIZATION.** Facing new levels of competition from Lidl, Chinese direct importers, and more – Europe's leading variety discounters began localizing assortment and improving their own digital skills – what does this mean for channel governance and resources?

## “Lights, Camera, Action!”

by **ETHAN** Sinick

Ethan Sinick, a consultant that helps brands develop the right assortment and negotiation strategies to win when selling through Action, will provide his views on how Action has changed in 2024 and what he sees as the emerging business model for 2025/26.

The foundation of a 2025/26 “Action Strategy” requires that suppliers recognize that across 11 countries in Europe, the growth of Action is supported by growing household penetration and consumer acceptance of a simple, convenient and exciting value retail model. The opportunity to grow with Action requires suppliers to support the pillars of simplicity and excitement in balance with their overall brand strategy in the market. Balancing the opportunity with Action requires a clear understanding of the ways in which shoppers add Action into an increasingly complex monthly repertoire of retailer solutions.

## SHE.MU.TOK and More

by **MATTHEW** Nobbs

Matthew Nobbs, a consultant that works with Chinese Direct Importers and has worked with organizations such as Pepco/Poundland, Lidl/Schwarz Group – will provide his unique perspective on three important questions for 2025/2026.

- **Question 1:** Who are these Chinese Direct Importers and how will they evolve as they scale?
- **Question 2:** How will leading retailers react to this new form of competition?
- **Question 3:** How should national branded suppliers prepare to both ride this new wave of volume growth while simultaneously making adjustments to avoid cannibalization and channel conflict?

## Localization in the Variety Channel – Is it a Thing?

by **SEBASTIAN** Rennack

Sebastian Rennack, a former retailer turned consultant that lives in both Germany and Poland, and has been tracking several variety discounters in both countries across the 2nd half of 2024, will give his perspective on how instore competition is changing at both a local level and international level in 2024 and what that means for 2025. He will answer the biggest question Retail Cities received from our discounter channel members in 2024: Is Localization a thing in the Variety Channel?

Sebastian will spotlight several case studies where what you see at a variety discounter in Germany is different from what you see at the same variety discounter in Poland. Further, Sebastian will give his views on how leading suppliers can align strategies at their head office level and at country level, noting that getting this balance right is not just important for growth in this channel but also in avoiding a “pan-European race to the bottom” when it comes to pack-price-promotion strategies on pan-European SKUs.

## Variety Discount Strategies, Resources and Alignment

by **RAY** Gaul

Ray Gaul will summarize this year's event by discussing best-in-class supplier approaches to building the right Strategies, Resources, and Alignment to grow volumes in 2025/26.

As always, our session will end with a simple checklist that we suggest you deploy to help you grow volumes in 2025/26.

# Our Experts



Ray is a co-founder and CEO of Retail Cities. Over the last 20 years, Ray has focused on understanding the retailer-on-retailer competition and how that changes brand strategies and investments and has become a world-renowned expert on the dynamics of retail competition and the future of the commerce. He has been generating detailed intelligence on Aldi and Lidl via workshops starting in the early 2000s. Ray is a frequent keynote speaker at trade and private client conferences.

**RAY Gaul**



Ethan is Managing Director of Shirland Ventures, a retail intelligence advisory business. He works with both Retail Cities and the Total Negotiation Group to advance CPG companies' understanding of the rapidly changing retail landscape. Prior to Shirland Ventures, Ethan was the head of MVI's International expansion team and played the lead role in establishing the Aldi & Lidl classroom workshops that have run annually since the early-2000s.

**ETHAN Sinick**



Sebastian Rennack is founder of Aletos Retail Advisory, internationally recognized analyst and long-standing contributor to Lebensmittel Zeitung, the leading German weekly business newspaper for the FMCG and food retail sector. He has extensive hands-on industry experience as former member of the international operations teams of Schwarz Group and Metro Group in Germany, Poland, Ukraine and Russia.

**SEBASTIAN Rennack**



Matthew is a pure commercial retailer, having spent 22 years at Lidl in senior roles, quickly progressing through roles in Buying and Supply Chain, becoming a Senior Director in 2005 with Supply Chain, Non-Food Trading, Promotional, Marketing and PR accountability. He also worked at the world leading health retailer Holland & Barrett and Q-commerce leading company Gorillas, before moving into consultancy.

**MATTHEW Nobbs**

