



The Retail Cities US CPG Commercial *Leadership* Series

Mapping the next \$3 trillion of **retail growth** - the Macro, Architectural and People Strategies required to win the US Commerce Market

The era where CPG commercial teams could exceed targets managing the growth of Walmart and Amazon has ended. A new era has emerged where brands will need to carefully map and strategize routes-to-market in order to outperform.

This workshop series provides you with the insights required to predict, map, and capture growth.

The Top 100 and the US Retail Growth Map

Which Retailers are Winning the Future and Why?

FREE Introductory Webinar to the Series

MARCH 14

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US Dollar Stores 2024/25

A Return to Growth?

APRIL 18

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Hitting the GM(ROI) - The US Retail Economic Map

How Retailers are Managing the Transition in Their Revenue/Asset Model

APRIL 24

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The US Macro Growth Map

Winning the World's Largest Emerging Market Part 1 - Pockets of Growth

JUNE 12

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The US Commerce/ Content Growth Map

Winning the World's Largest Emerging Market Part 2 - Winning the New Traditional Trade

SEPTEMBER 12

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2025-2030 US Strategy Growth Map

1, 3 & 5 Year Predictions

DECEMBER 9

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The Retail Cities US CPG Commercial *Leadership* Series

Date: 14 March 2024; 11 AM EST/8AM PST

The Top 100 and the US Retail Growth Map

Which Retailers are Winning the Future and Why?

In this presentation, Retail Cities presents the debut of the “Retail Cities 100”, a ranking of the 100 largest retail and foodservice operators in the US, with an eye towards the ones moving up the ranking fastest. In addition to the ranking itself, you will walk away with our critical conclusions about the changing marketplace:

- 1. The nature of volume concentration:** the Top 100 captured more than 100% of the total growth in the US retail marketplace in 2023. For all the talk about a fragmented landscape, volume continues to concentrate, even the single seller business continues to be aggregated under the umbrella of a few large marketplaces.
- 2. C-store consolidation powered by acquisition:** major acquisitions power consolidation in the US’s most fragmented channel – Convenience.
- 3. The 5 Es:** retail growth strategies revolve around Essentials, Eating Out, Expertise, Elegance and eCommerce. These describe the market’s evolution better than traditional channels.

The ranking serves as both a snapshot of today and a forecast into tomorrow’s retail growth story.

Date: April 18 2024; 11AM EST/8AM PST

“US Dollar Stores 2024/25: A Return to Growth?”

At Retail Cities, one of our primary areas of expertise is the global Value Discount Channel. In this webinar, we bring that perspective to its US manifestation - the value/dollar class of trade. In many ways, the rise of value discount in the US is predictable, with an income distribution reminiscent of an emerging market, but high purchasing power per capita - the US lends itself perhaps better than any market on earth to a format aimed at shoppers living from pay event to pay event.

This webinar captures the channel’s prospects for post-inflationary recovery and the level and nature of growth we should expect from Dollar General, Dollar Tree, Family Dollar, Aldi and the US’s other value-centric retailers. We also examine the different roles these stores play - from urban convenience shop to rural general store - and the changing role of value discounters in verticals such as health, beauty and food.

Date: 24 April 2024; 11 AM EST/8AM PST

Hitting the GM(ROI) - The US Retail Economic Map

How Retailers are Managing the Transition in Their Revenue/Asset Model

American retailer economics are in transition as the commerce world shifts. New costs to drive an omni-channel connection to shoppers, inflationary pressure in products and wages, and a more complex global supply chain are pressuring retailer profit models.

In this presentation, Retail Cities looks at the changing drivers of economic success with a particular focus on GMROI and how GMROI can be a predictive measure indicating broader retailer financial strength or difficulty. You will leave with a better understanding of the operational implications of these changing financial models and how retailers are adapting their strategies to drive improved financial performance.

In particular, brand suppliers will leave with the implications of how retailer financials are transforming and the best strategies to partner with these retailers for growth and improved returns.

Date: 12 June 2024; 11 AM EST/8AM PST

The US Macro Growth Map

Winning the World’s Largest Emerging Market Part 1 - Pockets of Growth

At Retail Cities, we look at the entire world of retail and seek to put the US into the appropriate global context, and then help brands and retailers develop strategies to capture global growth. Looking at the US through that lens, you quickly realize that although the US has incredible wealth, prosperity and infrastructure the unequal distribution of that makes the US look more like what used to be called a “developing” or “emerging” market in terms of that distribution.

That polarization, which manifests itself in a wide range of ways, creates opportunities that look more like growth opportunities in more traditional emerging markets, and properly leveraged, the US can register those levels of accelerated growth.

This session will look at:

- ◆ Income distribution and the 3 key types of shoppers
- ◆ The large share the traditional and unstructured trade plays in densely populated urban markets
- ◆ The diverse ethnic makeup and the need for targeted strategies
- ◆ The regional strength of markets such as California, Texas, Florida and New York that would all be Top 20 economies on their own

You will leave this session with a new view on the US as a growth market and the opportunities that exist for brand suppliers and retailers to capitalize



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The **Retail Cities** US CPG Commercial **Leadership** Series

Date: 12 September 2024; 11 AM EST/8AM PST

The US Commerce/Content Growth Map

Winning the World's Largest Emerging Market Part 2 - Winning the New Traditional Trade

Today, Amazon is the US's largest retailer in total Gross Merchandise Volume, although today almost 70% of that business is driven by small resellers on Amazon's 3P marketplace. Many of the world's largest "retailers" aren't retailers at all, but marketplaces of independent sellers.

At the same time, more and more marketing is being created and amplified by a broad network of independent content creators. This generates a commercial/content "distribution" model strongly reminiscent of the "traditional trade" in markets such as Brazil, India and Nigeria. For years, global brands have used partners, playbooks, creative small scale logistics and dense penetration of mindshare to win these millions of small bodegas, kirana shops, markets and pushcarts. Today, that same energy and approach will be required to win this refragmented sales/marketing ecosystem.

This presentation will focus on:

- ◆ The blurring of B2B and B2C at retail and how that changes channel strategy
- ◆ Managing the 3P ecosystem for upside and (critically) for mitigating commercial disruption
- ◆ "The New CPM" - how a "Content Penetration Model" will be essential for winning in this fragmented content creation world

Date: 9 December 2024; 11 AM EST/8AM PST

2025-2030 US Strategy Growth Map

1, 3 & 5 Year Predictions

Retail Cities will deliver predictions for the rest of the decade. Looking at the consumer, shopper and retail dynamics driving the future of the marketplace, Retail Cities issues its predictions at 3 levels to fuel your plans across a range of time horizons:

- ◆ **Reflectors:** near in events likely to become true that need to fuel your 2025 OGS dynamics driving the Ms and 2026 plans
- ◆ **Shapers:** longer-cycle events likely to be true that will critically shape the 2026 plan and influence the 3-year strat plan
- ◆ **Transformers:** predictions that reflect a trend in the industry that probably won't be specifically true, but highlight an area, skillset, opportunity or potentially disruptive threat that must be scenario planned for in a long-term strategic planning exercise

You will leave the session with a clear view of retail's future and the pillars they need to build their tactical and strategic plans.

This series is delivered by:

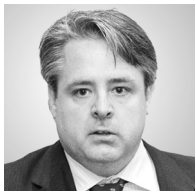


Bryan is Retail Cities' Managing Director for North America. He is an industry expert, keynote speaker, and advisor, with over 25 years of experience helping retailers, brands and their trading partners adapt to and win in the changing retail world through his expertise on both physical and digital retail, including retail ecommerce. Bryan spent over 20 years as Chief Knowledge Officer for Retail at Kantar and served as SVP of Commerce for Omnicom's retail marketing agencies. He is a frequent speaker at industry conferences, and his perspective has been featured in news outlets such as CNBC, the BBC and Fox Business.

BRYAN GILDENBERG

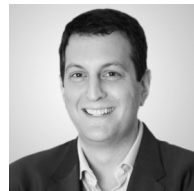


With 2 guests for **US Dollar Stores 2024/25**



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 various discounters globally, presenting Discounter workshops since 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 is a renowned Discounter expert, presenting Discounter workshops since the early 2000s.

ETHAN SINICK



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