



Seven & I Holdings Ltd in Retail

July 2023

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Scope

STATE OF PLAY

Seven & I Holdings Co Ltd sees sluggish historical growth, with a muted growth outlook

Offline channels dominate sales for Seven & I Holdings; e-commerce under-represented

Seven & I Holdings generates the vast majority of its sales from grocery retail

Various factors contribute to Seven & I Holdings' sales growth

EXPOSURE TO FUTURE GROWTH

Exposure to growth

Projected rankings

COMPETITIVE POSITIONING

Relative performance

Competitor overlap

Grocery retail dominates sales for Seven & I, while its e-commerce lacks geographic reach

Seven & I strong in grocery retail in Asia Pacific and the US

7-Eleven brand dominates group sales; most other brands lack a presence outside Japan

Seven & I Holdings relies heavily on the 7-Eleven brand of convenience stores

BRICKS-AND-MORTAR STRATEGY

Seven & I the global leader in convenience retail, overseas markets offer growth potential

Strategic review sees Seven & I exit non-grocery categories and focus on grocery banners

Optimisation of store openings, layouts and product range to drive customer spending

Asia Pacific dominates offline sales; Latin America growing quickly, albeit from a small base

Convenience retailers remain Seven & I's most important retail channel

The US and selected Asia Pacific markets will account for the bulk of new retail offline sales

DIGITAL STRATEGY

Seven & I is seeing a mediocre performance in retail e-commerce across categories

Q-commerce a natural fit for Seven & I due to its background in convenience retail

Digital loyalty a focus of Seven & I to drive returning customers and recurring spending

Seven & I is currently present in e-commerce only in Asia Pacific, but is growing rapidly

Retail e-commerce category contribution to sales for Seven & I differs across markets

Japan will remain the leading contributor of retail e-commerce sales over the forecast period

PRIVATE LABEL

Seven & I's private label products spans product categories and is available across brand portfolio

Private label sales aided by inflation concerns, and offer brand differentiation for Seven & I

Supplier relationships a key differentiator for quality of Seven & I's private label offerings

KEY FINDINGS

Executive summary

APPENDIX

Projected company sales: FAQs

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