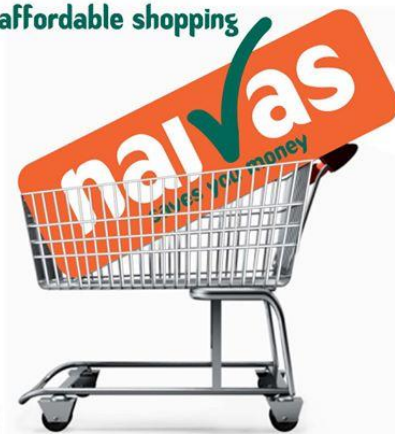




The new look of  
affordable shopping



# Retail Space is More than Available!

- Most new malls are struggling to fill shops
  - High Rental apart from the Anchor Tenants
  - Introduction of Dollar Rates Contracts
  - Way to Big Malls for small catchment zones
  - Wrong Location
  - Seriously Low Off Peak Hours
  - Repetitive and Monotonous Retail stores

50% Occupancy





30% Occupancy



40% Occupancy  
Yr1



# Who is Growing More?

- Main Retailers new shop opening Q1 till to date trail tier 2 supermarkets
- Traditional General Trade especially wholesalers becoming aggressive and growing more e.g. mulleys, Khetias etc
- New Formats are picking up especially Express Stores
- More growth in non-mall set up



# Bei zetu hazina game

**Mountain Mall Thika Road Offers**
**More discounts in store**


Buy any 2  
2ltrs and  
get a free  
cutlery set



ROYCO MCHUZI  
MIX - BEEF 500GM  
Was: 240  
Now: 216



ROYCO MCHUZI  
MIX - BEEF 200GM  
Was: 100  
Now: 90



BLUEBAND 1KG  
Was: 295  
Now: 198



NAIVAS SUGAR  
2kg 178  
1kg 89



COLGATE  
HERBAL  
100GM  
Was: 150  
Now: 110



TWISTER  
TOOTHBRUSH  
Was: 150  
Now: 110



DETTOL SOAP  
3'S PACK(all variants)  
Was: 250  
Now: 147



OMO EXTRA FRESH  
& FAST ACTION 1KG  
Was: 270  
Now: 205



NAIVAS  
PREMIUM  
TISSUE  
Best prices  
195



GEISHA 225GMS  
Was: 85 Now: 76



OHMS INFRARED COOKER OIF-B10  
Was: 4,995 Now: 3,545



OHMS 4 SLICE  
POP-UP TOASTER  
Was: 2,675  
Now: 1,735



OHMS CORDLESS KETTLE  
Was: 1,855  
Now: 1,395

**Best  
Prices**



SAMSUNG 2DOOR  
FRIDGE  
RT27H3000 SILV  
Was: 43,995  
Now: 39,995



HISENSE 55  
Was: 115,000  
Now: 87,000



HISENSE 32  
Was: 27,000  
Now: 24,000



DSTV FULL KIT  
Was: 5,700 Now: 5,200



SAMSUNG LED TV  
UA32F4000  
Was: 31,995  
Now: 29,995

One month free Compac plus  
Bouquet subscription for first 50  
customers who purchase a DSTV  
decoder at Mountain Mall branch



**naivas**  
saves you money

Offers apply only to Mountain Mall Thika road till 2nd June 2015

✓ Service ✓ Variety ✓ Freshness ✓ Low Prices



**25%** discount on all **Silentnight** products in  
Mountain mall branch for the period 28th of May to 28th of June.



Samsung Electronics East Africa marketing manager, consumer products, Ronald Arao (seated) demonstrates how the new Samsung 85" ultra high definition HD TV at Mayfair Suits in Nairobi last month. The television set costs Sh3.7 million.  
Photo/Diana Ngila Nation Media Group





## **PHENOMENAL GROWTH OF LIFESTYLE ITEMS (naivas data)**

- **In 2013 the electronics category grew by 86% Vs. 2012 the Furniture category grew by 74%**
- **In 2014 the electronics category grew by 64% Vs. 2013 the Furniture category grew by 47%**
- **The first two quarters of 2015 the Electronics category is at 66% and Furniture is at 42% quarter on quarter Vs. 2014.**

# Case Study - Diapers



AP/AOL

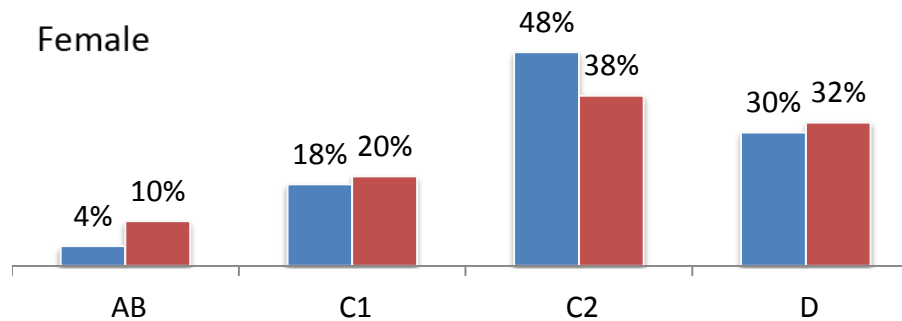
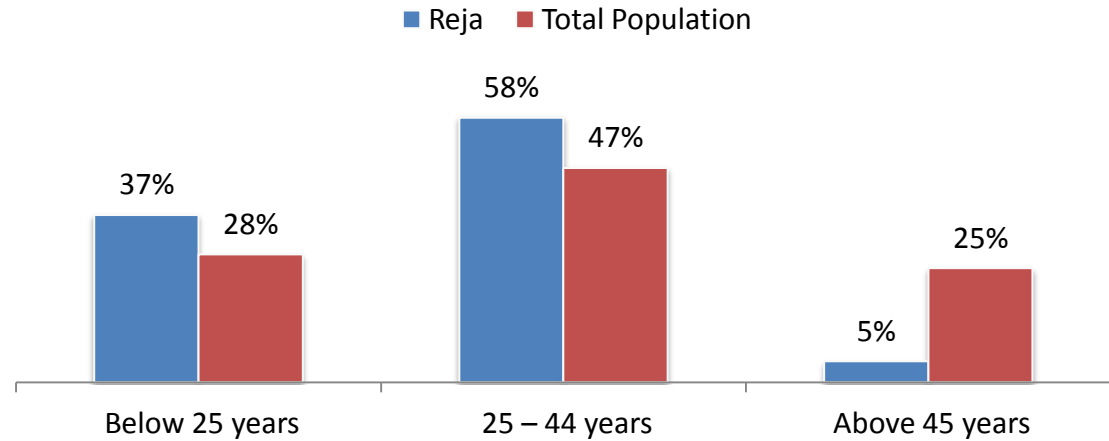
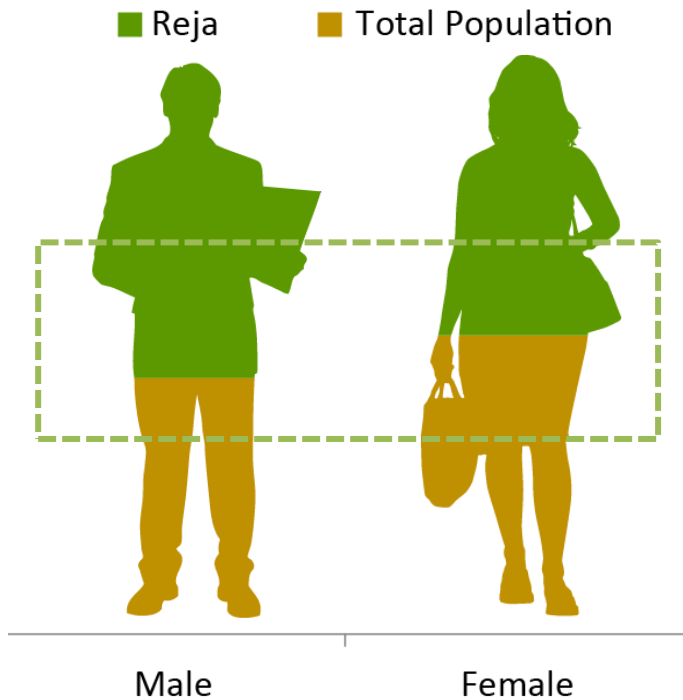
Diaper penetration in Kenya is up from 9% to than 13%.

For every 10 Babies 1 uses a diaper per night

Tier two and cheap imports make for more than 45% of the

# Males shop as much as female; rich people poor shoppers

## GENDER

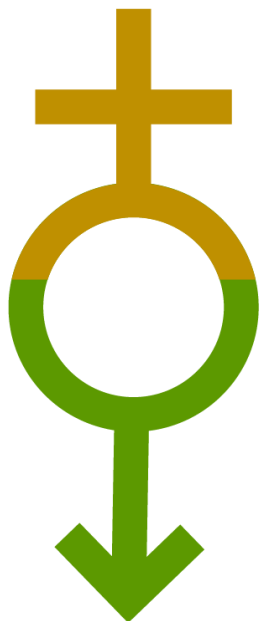




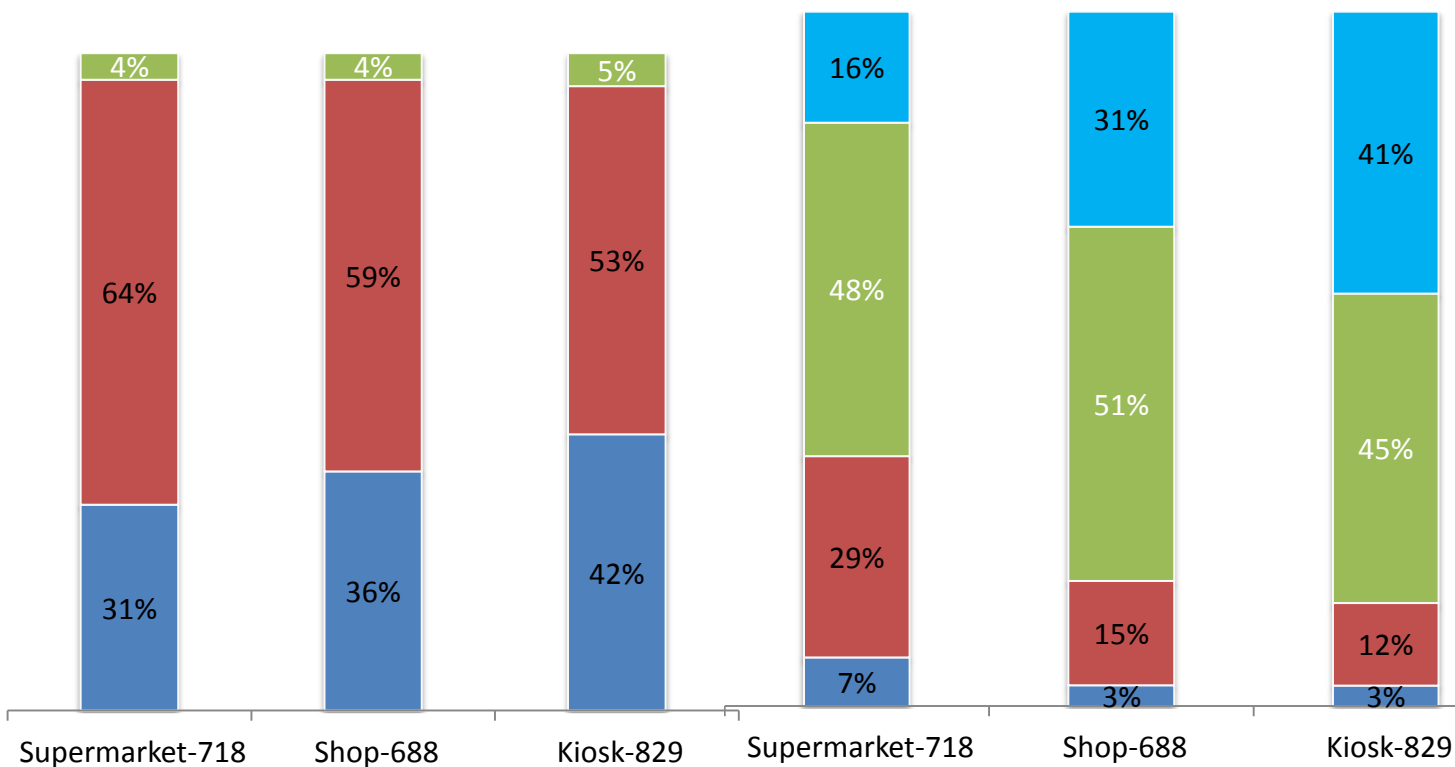
# Younger higher kiosk usage; richer higher supermarket usage

## GENDER

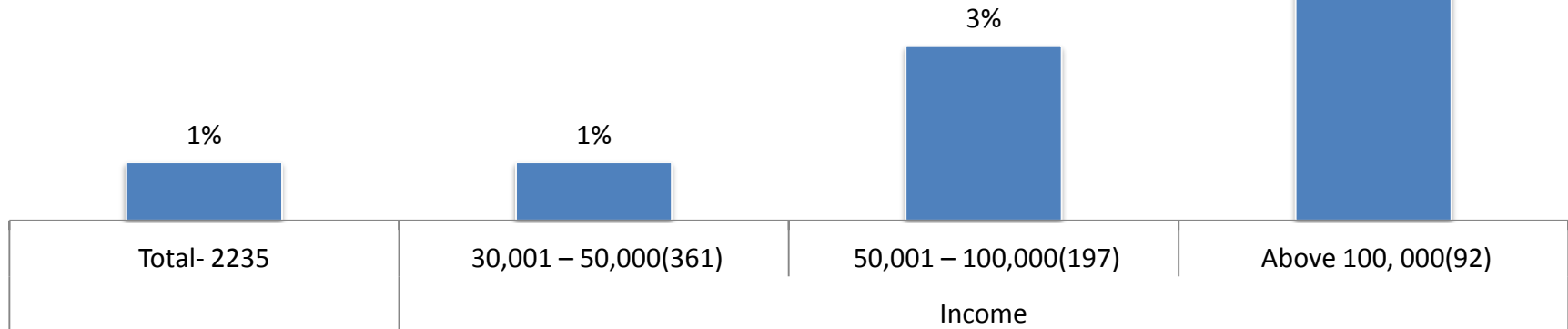
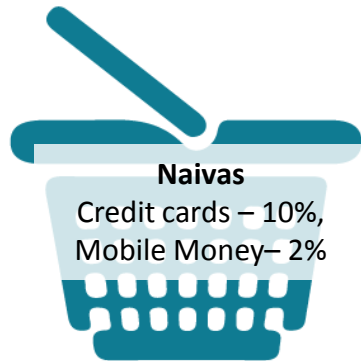
■ Male ■ Female



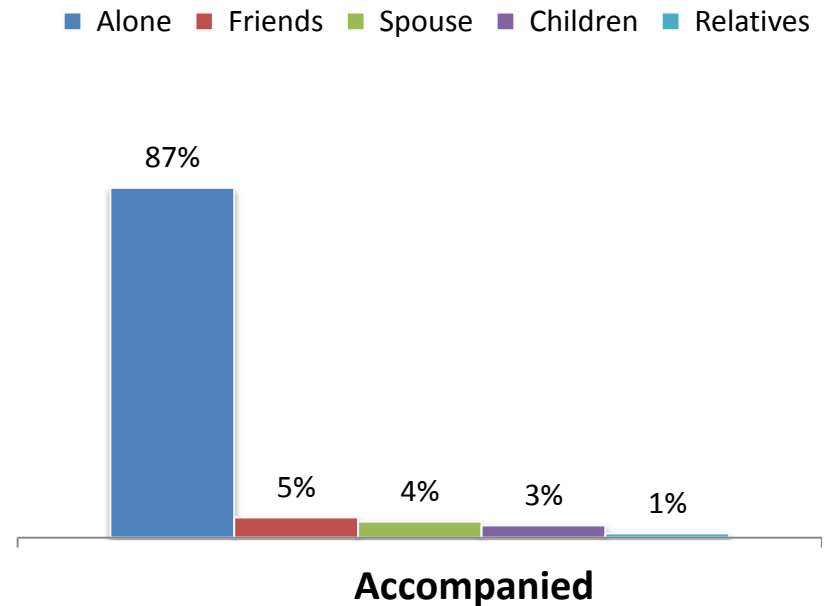
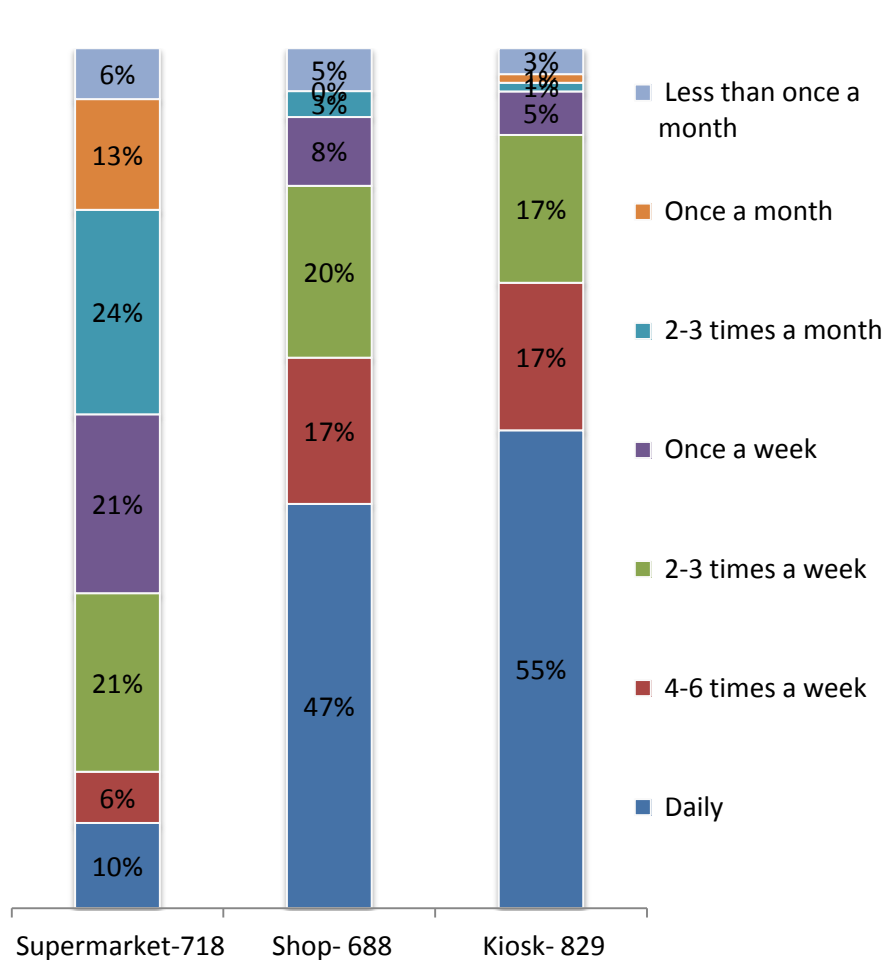
■ Below 25 ■ 25-44 yrs ■ Above 45 yrs



# Cash Wins, Debit & Credit Card Growing 10% from 6.7%, Mobile Money growing



# Kiosks for everyday needs; supermarket for occasional treats



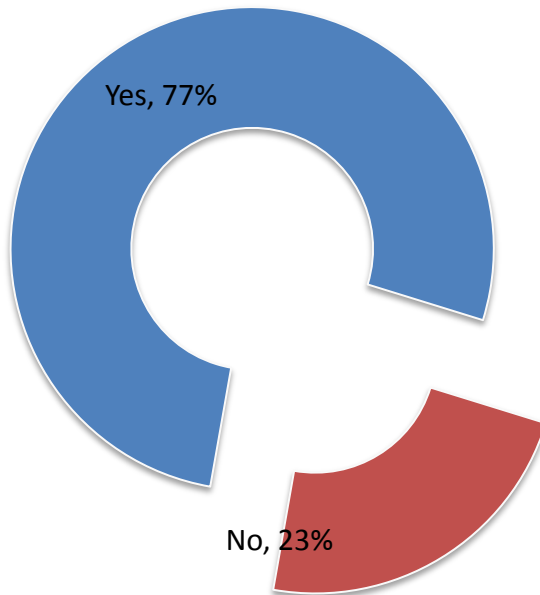
Female - 15%  
Supermarket - 23%



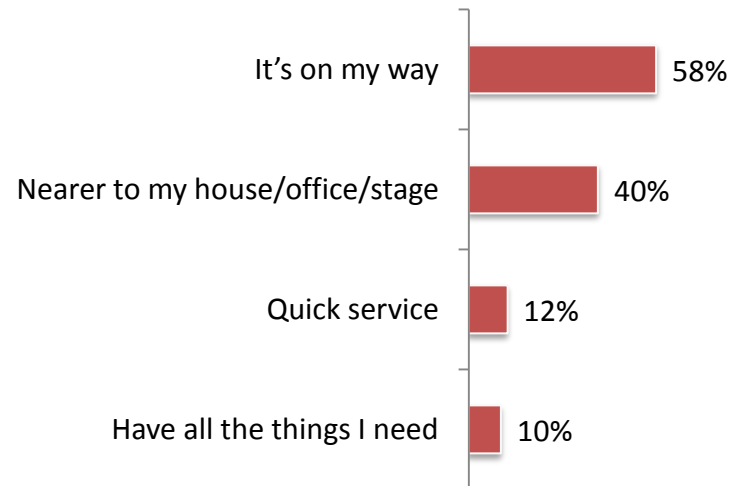
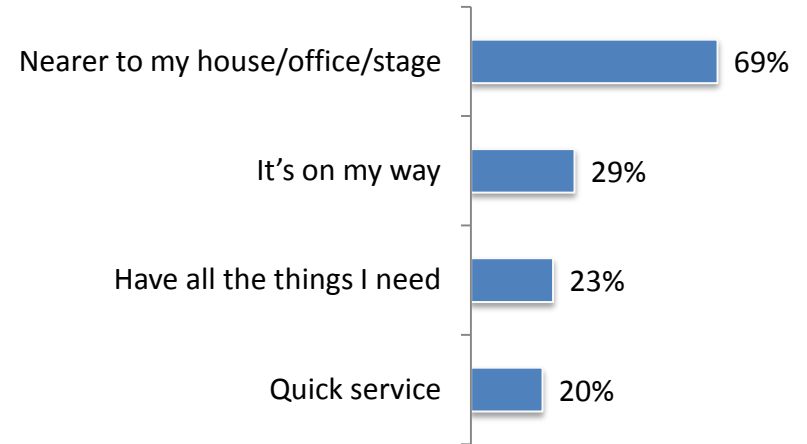


# Service the next competitive battlefront

## Incidence



**Outlet loyalty**  
Supermarkets  
81%



# No matter the economic class customers shop across for common brands

	SUPERMARKET	SHOP SKEW	KIOSK
<b>PRODUCT BOUGHT</b>			
Sugar			
Bread			
Milk			
Maize flour			
Air time			
Bar soap			
Rice			
Detergent			
Cooking oil			
Food additives			
Tissue paper			
Soda			
Juice			
Baking flour			
Tooth paste			
Lotion			
Confectionery			
Tea leaves			
Bathing soap			
Cooking fat			

# rival online markets – Jumia seems to be eating electronics market share

