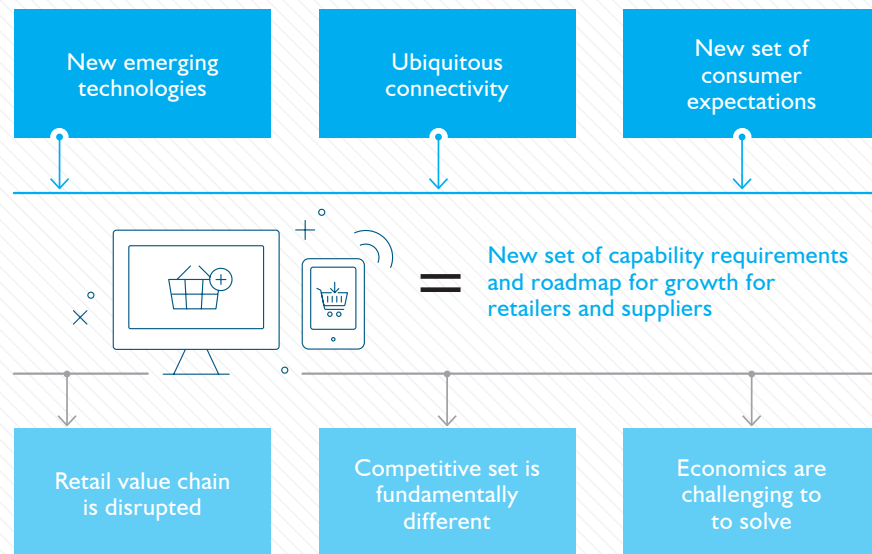


eCOMMERCE, DIGITAL ECOSYSTEMS AND RETAIL

ECOMMERCE AND DIGITAL ECOSYSTEMS ARE DISRUPTING GLOBAL RETAIL FASTER THAN EVER BEFORE.

This shift towards eCommerce is disrupting the retail value chain, dramatically altering the role of the physical store, retailers, brands, distributors and wholesalers.



SHIFTING COMPETITOR LANDSCAPE IN RETAIL

By 2022, Alibaba's B2C operations will overtake Walmart as the world's largest retail business, a position Walmart has held for over 15 years.

TOP 10 GLOBAL RETAILERS 2017 (USD bn)

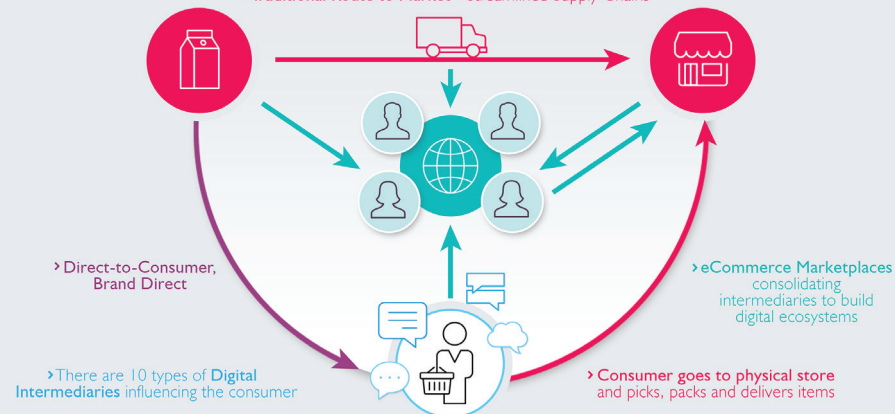


TOP 10 GLOBAL RETAILERS 2022e (USD bn)



Reference: Planet Retail: Winning Strategies_ECommerce

> Traditional Route to Market - Streamlined Supply Chains



Reference: Planet Retail

A DRAMATICALLY DIFFERENT FUTURE RETAIL VALUE CHAIN

Streamlined supply chains are being disrupted by new business models and routes to market. eCommerce marketplaces are providing new platforms where retailer and brands transact, fragmenting shopper destinations and fulfillment requirements.

This, coupled with digital intermediaries such as social platforms, delivery networks and payment platforms, are further complicating the value chain by influencing how consumers research, purchase and receive products.

I WANT US TO STOP TALKING ABOUT
DIGITAL AND PHYSICAL RETAIL

— AS IF THEY'RE TWO —
SEPARATE THINGS.
THE CUSTOMER DOESN'T
THINK OF IT THAT WAY,
AND WE CAN'T EITHER.

Doug McMillon | Walmart CEO

eCOMMERCE

FAST FACTS

> **\$1,900,000,000,000**

Size of current global eCommerce market

> **\$4,000,000,000,000**

Expected market size by 2020

> **R11,000,000,000**

Size of the South African eCommerce market

> eCommerce market relative to traditional retail (% of retail sales)

1.2% SA | **18%** Global

> **<5%** vs **>20%**

Growth: Retail vs. eCommerce

> **71%**

Annual growth in number of manufacturers selling direct to consumer



SMOLLAN eCOMMERCE

Increasing online availability, visibility and shopper engagement.

	SALES MANAGEMENT	SHOPPER MARKETING & PLATFORM MANAGEMENT	SUPPORT SERVICES
	PRE-SCREEN	ON-SCREEN	OFF-SCREEN
eCOMMERCE	<ul style="list-style-type: none"> • Key Account Management 	<ul style="list-style-type: none"> • Strategic traffic generation <ul style="list-style-type: none"> - SEO - Digital advertising - Social media management - Activation • Content creation • Digital merchandising • Content audits & Reporting • Review management 	<ul style="list-style-type: none"> • B2B Sales • Warehousing • Shopper fulfillment • Retailer fulfillment
MOBILE and DTC		<ul style="list-style-type: none"> • Brand sites • Applications 	<ul style="list-style-type: none"> • Warehousing • Fulfillment

TO FIND OUT MORE ABOUT OUR eCOMMERCE OFFERING, [CLICK HERE](#) OR CONTACT [Rudi Nienaber](#).

Follow us on social media and our website to view and support Smollan eCommerce.



@SmollanGroup



@SmollanGroup



@Smollan1931



SmollanGroup



www.smollan.com/news