Driving growth in Canada continues to get more challenging. Shoppers are demanding greater value and convenience, retailers are consolidating, and commerce is being disrupted by new technology. Revising plans to account for this evolving environment is necessary to avoid leaving money on the table. However, these changes also create opportunities for growth.

Join Kantar Retail to help you understand:

• The underlying trends impacting the Canadian retail and shopper landscape today
• The global and national macro-economic factors that will affect shoppers spending and our retail plans in the year ahead
• The current strategies, positioning, and growth outlook of Canada’s market leaders (Loblaw, Walmart), and disruptors (Costco and Amazon)

You’ll walk away from this Workshop with:

• Perspective to redeploy resources, using examples from across the market
• Understanding of rising opportunities align with key retailers (Loblaw, Walmart, Costco, Amazon)
• The five-year growth outlook for key retailers and channels

Kantar Retail Presenters:

Dave Marcotte  
SVP

Sara Al-Tukhaim  
Director

Robin Sherk  
Director

Doug Hermanson  
Principal Economist

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The analysis and conclusions presented by Kantar Retail represent the opinions of Kantar Retail. The views expressed do not necessarily reflect those of the retailers under discussion, nor are they endorsed or otherwise supported by the management of the retailer.
Canadian Retailing Forum
REdeploying REsources to Drive Retail Growth in Canada

9 a.m. to 10 a.m.

**Five Global Retail Trends Reshaping Retail Today**
*David Marcotte, Senior Vice President, Kantar Retail*

Retail reconfiguration, changing demography, and new technology are fundamentally changing how suppliers can and will connect with shoppers. In this session, we will examine the following underlying shifts in the global marketplace and their projected impact for Canada:

- The unfolding impact of retailer buying power consolidation
- Where urbanization and suburbanization will drive up customer engagement costs
- How globalization reflected in merchandising and marketing is giving rise to new conversations
- How format reconfiguration is moving beyond hypermarkets and diversifying across channels
- Smart device and Internet ubiquity giving perpetual shopping reach and new store experiences

**BREAK**

10:10 a.m. to 10:40 a.m.

**Macro Planning Considerations for Canada**
*Doug Hermanson, Senior Economist, Kantar Retail*

Canada’s retail environment has become more challenging amid varying global effects. As conditions remain volatile, Canadian suppliers will need to become more agile to capitalize on pockets of strong growth and cushion themselves from weakness in lagging markets and shopper segments. In this session, we will:

- Examine Canada’s market trajectory to help suppliers better calibrate their plans
- Identify areas of consumer strength to watch

**BREAK**

11 a.m. to 11:55 a.m.

**Loblaw’s Pressure in the Grocery Landscape**
*Robin Sherk, Director, Kantar Retail*

Loblaw’s overarching strategy is staying consistent, even as the dynamics surrounding the retailer are shifting. As management looks to drive growth and optimize profit, it continues to pressure suppliers for support. In this session, we will:

- Consider Loblaw’s positioning within the grocery channel
- Assess the retailer’s performance and projected sales growth through 2021
- Understand the retailer’s pressures and consider ways to respond

**LUNCH**

1 p.m. to 1:45 p.m.

**Walmart Canada’s Growth and Direction**
*David Marcotte, Senior Vice President, Kantar Retail*

Following two years of increasing growth, Walmart Canada is feeling emboldened to further drive leverage and sales growth. With a new chief executive at the helm and a recent reshuffling in Walmart International’s leadership, management will bring new influences and direction to the table. Understanding this context will help suppliers better anticipate the shifts to come. In this session, we will cover:

- The broader shifts at Walmart International that may impact Canada
- Walmart Canada’s stance and growth outlook in the marketplace
- Emerging opportunities for alignment
1:45 p.m. to 2:35 p.m.
**Costco Canada: The Evolution**
*Sara Al-Tukhaim, Director, Kantar Retail*
With a keen eye on retaining Canadian shoppers, Costco has made strides over the past year to drive member relevance by evolving and adapting its model in Canada and globally. Specifically, Costco is strengthening its strategic focus on unique value through product and service innovation, health and wellness integration, and new growth platforms such as online and small business. While these efforts increase opportunities for supplier alignment, they also pose new pressures on top of the longer-standing challenges inherent in selling to Costco. In this presentation, we will address:

- How Costco is doing in Canada and beyond, and what it means for Canadian operations
- Costco’s strategic direction and the implications for suppliers
- Emerging growth platforms for Costco in Canada and how suppliers should think about them

**BREAK**

2:55 p.m. to 3:40 p.m.
**Amazon’s Growing Reach**
*Robin Sherk, Director, Kantar Retail*
Amazon continues to drive greater reach, disrupting shoppers’ habits and routines and impacting how store-based retailers sell. Now that Amazon is on track to become the second-largest retailer globally by the end of 2017, its scale allows it to disrupt the market at an ever-increasing level. In this session, we will:

- Identify Amazon’s shopper reach and growth outlook in Canada
- Consider the retailer’s positioning internationally to anticipate what’s on the horizon
- Discuss online merchandising trends and approaches to effectively reach shoppers online

3:40 p.m. to 4 p.m.
**REdeploying RESources to Maximize Growth**
*Robin Sherk, Director, Kantar Retail*
Given ongoing market disruption, suppliers must adapt how they design and deploy their go-to market plans to capture today’s market opportunities. This closing discussion will review:

- The day’s key themes and consider the planning implications for 2017 and beyond
- Key skills and capabilities needed to succeed in today’s retail environment