



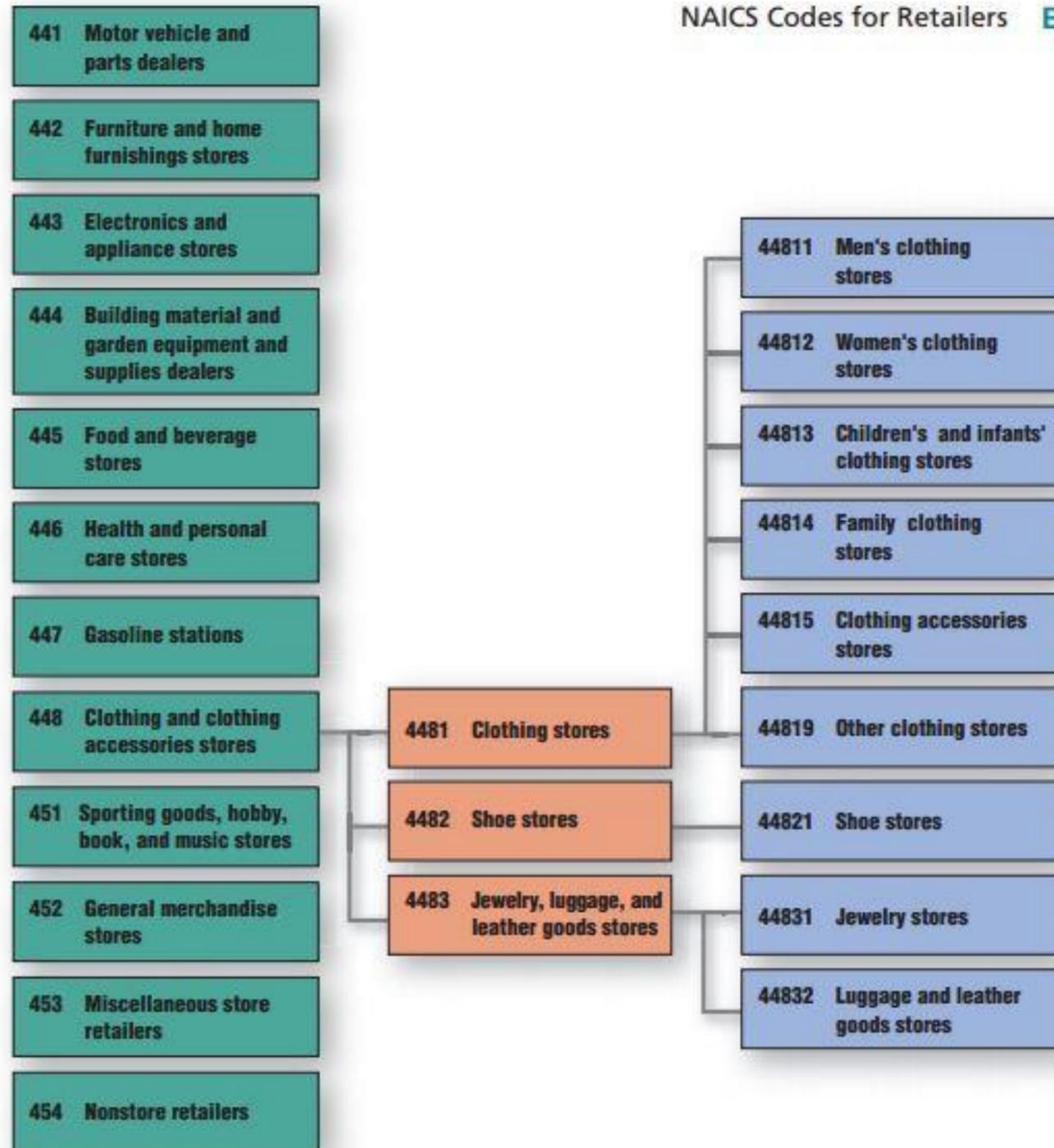
TIPE RETAILER

MANAJEMEN BISNIS RITEL
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Aryan Eka Prastya Nugraha

Type of Merchandise

NAICS Codes for Retailers EXHIBIT 2-1



Variety and Assortment of Bicycles in Different Retail Outlets

	Adult Road	Adult Hybrid	Mountain	Child
Wheelworks	Bianchi, Colnago, Peter Mooney, Serotta, Trek 150 SKUs \$419.99–\$7,999.99	Bianchi, Specialized, Trek 96 SKUs \$349.99–\$1,899.99	Salsa, Santa Cruz, Specialized, Trek 122 SKUs \$299.99–\$1,899.99	Electra, Gary Fisher, Haro, Kettler, Trek 56 SKUs \$159.99–\$429.99
Toys R Us	Mobo Triton Pro 3 SKUs \$299.99–\$359.99	—	Cycle Force, Huffy, Schwinn 4 SKUs \$79.98–\$135.99	Avigo, Cycle Force, Huffy, Mongoose, Pacific Cycle 228 SKUs \$45.99–\$499.99
Walmart	Cycle Force, Genesis, Kent, Mongoose 26 SKUs \$99.97–\$499.00	Cycle Force, Genesis, Schwinn, Tour de France 9 SKUs \$179.00–\$349.00	Havoc, Genesis, Schwinn, NEXT, Roadmaster 63 SKUs \$88.00–\$379.00	Huffy, Koxx, Micargi, Schwinn, Tour De France 195 SKUs \$28.13–\$675.00



Why do the three retailers' assortments differ from each other?

Variety is the number of merchandise categories a retailer offers.

Assortment is the number of different items offered in a merchandise category. Variety is often referred to as the breadth of merchandise, and assortment is referred to as the depth of merchandise

FOOD RETAILERS

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	Estimated Sales, 2013 (\$ millions)	Estimated Sales Growth 2008–2013 (%)
Food Retailers		
Conventional supermarkets	\$622,896	3.3
Supercenters	354,905	7.1
Warehouse clubs	159,075	6.7
Convenience stores	748,186	3.0
General Merchandise Retailers		
Department stores	73,291	–0.9
Apparel and accessory specialty stores	210,236	4.5
Jewelry stores	36,848	3.4
Shoe stores	29,606	1.8
Furniture stores	66,262	2.2
Home furnishing stores	59,465	2.8
Office supply stores	26,404	2.2
Sporting goods stores	49,717	5.3
Bookstores	19,101	2.1
Building material, hardware, and garden supply stores	393,254	3.6
Consumer electronics and appliance stores	141,800	4.4
Drugstores	250,172	4.2
Full-line discount stores	126,385	0.0
Extreme-value stores	52,454	3.1
Nonstore Retailers		
Nonstore retailing	340,421	9.0
E-commerce	282,055	15.0



The world's largest food retailer, Walmart, attains more than \$443 billion in sales of supermarket-type merchandise. On this measure, it is followed by Carrefour (France), Tesco (United Kingdom), Metro Group (Germany), Schwartz Group (Germany), and Kroger (United States).⁴ In North America specifically, the largest supermarket chains in order are Walmart, Kroger, Costco, Target, Safeway, Supervalu, Loblaw, Publix, and Ahold US.

Characteristics of Food Retailers

	Conventional Supermarket	Limited-Assortment Supermarket	Supercenter	Warehouse Club	Convenience Store
Percentage food	70–80	80–90	30–40	60	90
Size (000 sq. ft.)	35–40	7–10	160–200	100–150	3–5
SKUs (000)	30–40	1–1.5	100–150	20	2–3
Variety	Average	Narrow	Broad	Broad	Narrow
Assortment	Average	Shallow	Deep	Shallow	Shallow
Ambience	Pleasant	Minimal	Average	Minimal	Average
Service	Modest	Limited	Limited	Limited	Limited
Prices	Average	Lowest	Low	Low	High
Gross margin (%)	20–22	10–12	15–18	12–15	25–30

A conventional supermarket is a large, self-service retail food store offering groceries, meat, and produce, as well as some nonfood items, such as health and beauty aids and general merchandise.⁷ Perishables, including meat, produce, baked goods, and dairy products, account for 30 percent of supermarket sales and typically have higher margins than packaged goods.

To compete successfully against intrusions by other food retailing formats, conventional supermarkets are differentiating their offerings by (1) emphasizing fresh perishables, (2) targeting green and ethnic consumers, (3) providing better value with private-label merchandise, and (4) providing a better shopping experience



Health-conscious and environmentally conscious consumers are demanding organic and locally produced foods from food retailers.

Conventional supermarkets are offering more fair trade, natural, organic, and locally sourced foods for the growing segment of consumers who are health- and environmentally conscious

The benefits of private label brands to retailers include increased store loyalty, the ability to differentiate themselves from the competition, lower promotional costs, and higher gross margins compared with national brands.



Supercenters are large stores (160,000 to 200,000 square feet) that combine a supermarket with a full-line discount store.

Hypermarkets are also large (160,000 to 200,000 square feet), combination food (60 to 70 percent) and general merchandise (30 to 40 percent) stores. The world's second-largest retailer, Carrefour, operates hypermarkets. Hypermarkets typically stock fewer SKUs than do supercenters—between 40,000 and 60,000 items, ranging from groceries, hardware, and sports equipment to furniture and appliances to computers and electronics.



At convenience stores you can jump out of your car and pick up a Coke and some chewing gum while getting gas.

Convenience stores provide a limited variety and assortment of merchandise at a convenient location in 3,000- to 5,000-square-foot stores with speedy checkout

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Department Stores

Traditionally, department stores attracted customers by offering a pleasing ambience, attentive service, and a wide variety of merchandise under one roof. They sold both soft goods (nondurable or consumable goods), which have a shorter lifespan such as cosmetics, clothing, and bedding) and hard goods, also known as durable goods, which are manufactured items that are expected to last several years, such as appliances, furniture, and consumer electronics.

Type	Variety	Assortment	Service	Prices	Size (000 sq. ft.)	SKUs (000)	Location
Department stores	Broad	Deep to average	Average to high	Average to high	100–200	100	Regional malls
Discount stores	Broad	Average to shallow	Low	Low	60–80	30	Stand alone, power strip centers
Category specialists	Narrow	Very deep	Low to high	Low	50–100	20–40	Stand alone, power strip centers
Specialty stores	Narrow	Deep	High	High	4–12	5	Regional malls
Home improvement centers	Narrow	Very deep	Low to high	Low	80–120	20–40	Stand alone, power strip centers
Drugstores	Narrow	Very deep	Average	Average to high	3–15	10–20	Stand alone, strip centers
Off-price stores	Average	Deep but varying	Low	Low	20–30	50	Outlet malls
Extreme-value retailers	Average	Average and varying	Low	Low	7–15	3–4	Urban, strip

Category Specialists

Apparel/Shoe/Accessories Mens Wearhouse DSW	Furniture IKEA Pier 1 Sofa Express	Sporting Goods Bass Pro Shops Outdoor World Cabela's Dick's Sporting Goods L.L. Bean Golfsmith REI Sports Authority	Office Supply Office Depot Staples Office Max
Books Barnes & Noble	Home Bed Bath & Beyond The Container Store World Market		Pet Supplies PetSmart PETCO
Consumer Electronics Best Buy	Home Improvement Home Depot Lowe's	Toys Toys "R" Us	Musical Instruments Guitar Center



Category specialists, like Staples, offer a deep assortment of merchandise at low prices.

Category specialists are big-box stores that offer a narrow but deep assortment of merchandise

Specialty stores concentrate on a limited number of complementary merchandise categories and provide a high level of service.

Apparel

Abercrombie & Fitch
 Brooks Brothers
 The Buckle
 Forever 21
 The Gap
 H&M
 Indochino.com
 Ralph Lauren
 J. Crew
 Threadless
 Urban Outfitters
 Victoria's Secret
 Zara

Electronics/Software

Ascend Acoustics
 Apple
 Brookstone
 Crutchfield
 GameStop
 Newegg
 Radio Shack
 Tiger Direct

Housewares

Crate & Barrel
 Pottery Barn
 Sur la Table
 Williams Sonoma

Jewelry

Blue Nile
 Tiffany & Co.
 Zales

Optical

1-800 Contacts
 LensCrafters
 Pearle Vision
 Sunglass Hut

Health/Beauty

Aveda
 Bath & Body Works
 The Body Shop

GNC

Kiehl's
 M.A.C.
 MakeupMania.com
 Sephora

Shoes

ALDO
 Allen Edmonds
 FootLocker
 Nine West
 Steve Madden
 The Walking Company
 Zappos

Drugstores are specialty stores that concentrate on health and beauty care (HBC) products.

Many drug stores have steadily increased the space devoted to cosmetics. Prescription pharmaceuticals often represent almost 65 percent of drugstore sales.

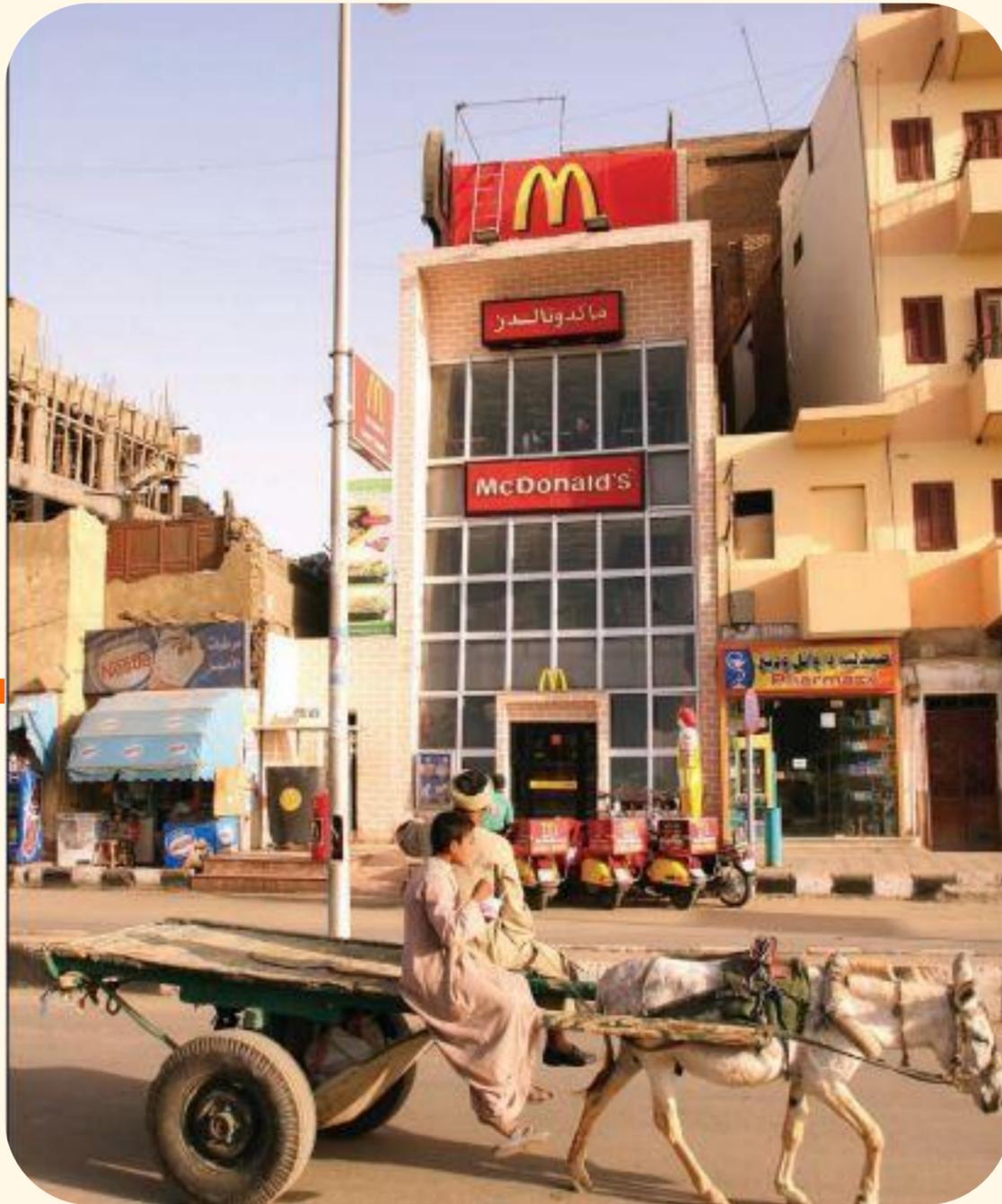
service retailers, or firms that primarily sell services rather than merchandise, are a large and growing part of the retail industry.

Type of Service	Service Retail Firms
Airlines	American, Southwest, British Airways, JetBlue
Automobile maintenance and repair	Jiffy Lube, Midas, AAMCO
Automobile rental	Hertz, Avis, Budget, Enterprise
Banks	Citi, Wachovia, Bank of America
Child care centers	Kindercare, Gymboree
Dry cleaners	Zoots
Education	Babson College, University of Florida, Princeton Review
Entertainment	Disney World, Six Flags, Chuck E. Cheese, Dave & Busters
Express package delivery	FedEx, UPS, U.S. Postal Service
Fast food	Wendy's, McDonald's, Starbucks
Financial services	Merrill Lynch, Morgan Stanley, American Express, VISA
Fitness	Jazzercise, Bally's, Gold's Gym
Health care	Humana, HCA, Kaiser
Home maintenance	Chemlawn, Mini Maid, Roto-Rooter
Hotels and motels	Hyatt, Sheraton, Marriott, Days Inn
Income tax preparation	H&R Block
Insurance	Allstate, State Farm, Geico
Internet access/electronic information	Google, Internet Explorer, Mozilla Firefox, Safari
Movie theaters	AMC, Odeon/Cineplex
QSR	Panera Bread, Red Mango, Pinkberry
Real estate	Century 21, Coldwell Banker
Restaurants	Applebees's, Cheesecake Factory
Truck rentals	U-Haul, Ryder
Weight loss	Weight Watchers, Jenny Craig, Curves
Video rental	Blockbuster
Vision centers	LensCrafters, Pearle

Independent, Single-Store Establishments

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Franchising is a contractual agreement in which the franchisor (the company) sells the rights to use its business trademark, service mark, or trade name, or another commercial symbol of the company, to the franchisee for a one-time franchise fee and an ongoing royalty fee, typically expressed as a percentage of gross monthly sales.



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- 2. Manfaat penting dari informasi penting hari ini**
- 3. Tindak lanjut yang dapat saudara lakukan**

Thank You!

Any Questions?