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December 2022

Celebrating RETAIL EXCELLENCE



WHAT'S DRIVING
RETAIL FORWARD

PEOPLE

DATA

TECHNOLOGY

INNOVATION

EMOTION

EXPERIENCE

EVOLUTION

CHANGE

SUSTAINABILITY

WEB3/METaverse



#HappyAtLuLu

We at Lulu have always been trying to widen our network, expand our range, innovate our promotions and improve our service so that more than **1.6 million** shoppers who come to our **244 stores** across the region daily, get exactly what they want,

Happiness!

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Where the world comes to shop,
safely!

“ We envision a 100-store operation before the end of 2024 ”

Old-style brick and mortar F&B will never “die”

One of LA's favourite fast-casual restaurant chains Dave's Hot Chicken, specialising in Nashville-style hot chicken, recently entered the Middle East. Operated by Lavoya Restaurant Group in the region the brand has extensive regional expansion plans. The aim is to open a total of 31 Dave's Hot Chicken in 6 countries in the region with Riyadh, Saudi Arabia to follow in Q1 2023 after the UAE and Qatar.

On the sidelines of the brand's expansion Walid Hajj, Co-Founder & CEO of Lavoya Restaurant Group spoke about how the food and beverage (F&B) landscape has transformed over the past few years.

“I think the industry has witnessed nothing short of a revolution during the past 4-5 years helped and expedited by Covid,” Hajj stated. “Technology took over and delivery became an important part of the business supported by solid delivery aggregators. This has transformed the financial model and the big question around – how to make money – in this business in a substantial way.”

Having said that the “experience” part of casual dining has bounced back in a big way after Covid, Hajj stressed. If this is anything to go by, the old-style brick and mortar F&B will never “die”, even as delivery continues to be an important complementary channel rather than an independent sector. “I strongly believe the idea of creating an F&B brand in the dark is a losing battle in the long-term,” Hajj observed.

The big question, therefore, is how can F&B businesses adjust their overall model to take advantage of these trends and continue to build solid brands?





We plan to take the company **public** in the next **two years**



Floward continues to flourish

In an exclusive Q&A **Abdulaziz B. Al Loughani, Chairman & CEO of Floward** shares the brand's evolution and future growth strategy.

Founded by Abdulaziz B. Al Loughani and Mohammed Al Arifi Floward is an online flowers and gifting destination. In 2017 Floward was born in Kuwait and soon expanded to cover all the GCC countries and the UK. The brand guarantees same-day delivery across the board through its own refrigerated fleet to ensure arrangements arrive fresh to customers. Floward sources its flowers daily from growers and farmers around the world and partners with local and international brands to offer a wide range of gifts. With an aim to further strengthen its position as a quick commerce gifting platform Floward recently acquired a Kuwait based fragrance brand Mubkhar with presence in Qatar, Saudi Arabia and Bahrain specialising in fragrances and essential oils.

What was the main inspiration behind setting up Floward?

Five years ago, the fresh-cut flowers industry in the GCC was estimated at \$1.5 billion with less than 0.5% of it being online. The industry was dominated by traditional brick and mortar stores with no clear leader offline and online. With that in mind we decided to establish Floward following the pure play e-commerce business model. What that means is we buy our own flowers and arrange it in-house at our fulfilment centres across all our locations. Once an order is placed, we prepare it and manage last mile delivery to our customers.

We use our size and scale as a force for good to accelerate towards decarbonisation.



Amazon “obsessed” about quick fulfilment all-year round

As mega shopping event Black Friday coincided with mega sporting event FIFA World Cup 2022 in Qatar shoppers are expected to contribute \$8.5 billion to the MENA e-tailing market, estimates RedSeer. Interestingly, the end-of-year holiday shopping cycle in the MENA region begins at least a couple of months before Singles Day (November 11) and Black Friday celebrated on the Friday after Thanksgiving (November 25 this year). If anything, all fingers point towards MENA shoppers being excited to maximise their opportunity to avail the most attractive deals on ‘White Friday’ – the equivalent of Black Friday for the Arab world. Like every year Amazon MENA ran its ‘White Friday Sale’ from November 21-28, 2022.

As shoppers demand quick fulfilment even during peak sale periods during an exclusive Q&A with *Prashant Saran, Director of Operations, Amazon MENA* we discussed how Amazon keeps pace.

How is Amazon ensuring quick fulfilment of orders especially during peak periods such as White Friday?

We are obsessed with our customers and this obsession continues even during White Friday. We always put the customer first and ask ourselves what will delight them and then work backwards to figure out how to innovate on their behalf. Planning for peak periods such as White Friday is ongoing throughout the year at Amazon. We build capacity, hire additional resources as needed and conduct several stress tests to ensure we can reach more customers across the region, faster and with a wider selection of products. This year we’ve increased our storage capacity by over 50% in the UAE and 80% in Saudi Arabia to store millions of products for customers and seller partners, therein enabling us to scale for the White Friday sale.

We continue to strengthen the last-mile delivery network with our world-class technology and global processes and programmes to speed up delivery time for customers. One such programme is the Delivery Service Partner Program. Launched in Saudi Arabia, it empowers local entrepreneurs to set up and manage their own logistics business delivering Amazon packages, while increasing the capacity of our delivery network. In the UAE, we opened our largest delivery station in Abu Dhabi in June 2022. The 4,700 sqm state-of-the-art delivery station is the second largest in the country and provides same-day and one-day deliveries to customers across the city.

Could you highlight some mega trends for this holiday season?

On the operations side of the business one of the trends we’ve been seeing over the past couple of years is the need for



Situated on the northern western tip of Jeddah the **Red Sea Mall** welcomes over **14 million visitors** every year.



Red Sea Mall: KSA's foremost shopping destination



Situated on the northern western tip of Saudi Arabia's Jeddah the Red Sea Mall is an iconic location and one of the leading retail and entertainment destinations.

The mall is strategically located at a walking distance from the Jeddah Corniche Circuit, which hosts the Saudi Arabian Formula One Grand Prix every year. In addition, the Red Sea Mall is right next to one of the plots that hosts the annual Jeddah Seasons events and related activities. Moreover, the mall is a short 15-minute drive from the new King Abdulaziz International Airport.

A formidable tenant mix

With a built-up area of 242,200 square metres and a gross leasable area (GLA) of 165,000 square meters Red Sea Mall welcomes over 14 million visitors every year. The mall boasts a strong tenant mix with more than 600 retail outlets

including anchor department stores and a hypermarket.

Tenants include a formidable mix of multinational brands, regional names as well as local up-and-coming concepts. What's more numerous multinational brands continue to choose the Red Sea Mall for their flagship and/or exclusive location in Jeddah.

The Red Sea Mall also houses an exciting range of leisure and entertainment offerings which include a 12-screen state-of-the-art movie theatre, five large entertainment centres and more than 73 restaurants and cafés. Moreover, the Red Sea Mall is home to a five-star hotel. The Red Sea Mall development also includes a commercial tower for corporate offices.

In addition, to make the shopping experience delightful and convenient Red Sea Mall offers 5,000 parking spots (outdoor and covered) for visitors.

Red Sea Mall: At a glance

Built-up area: **242,200 sqm**

GLA: **165,000 sqm.**

Annual footfall: **14 million**

Retail outlets: **600+**

F&B offerings: **More than 73 restaurants and cafés**

Leisure, entertainment & hospitality offerings: **12-screen state-of-the-art movie theatre, 5 large entertainment centres, 5-star hotel, plus more**



Unfolding Retail Stories

Over 300 retail industry experts from 120+ companies including more than 80 speakers congregated at the recently concluded 11th Middle East Retail Forum (MRF) 2022 to discuss trends, share learnings and deliberate on key elements/trends that will drive the billion-dollar regional retail industry forward.

In what has evolved into a seminal retail intelligence platform MRF once again brought together industry leaders, innovators and trailblazers who passionately discussed changes, challenges and opportunities for the industry.

Under the theme 'Unfolding Retail Stories' MRF 2022 offered a glimpse of the transformation of the UAE and the GCC retail landscape from a quaint trading centre to a global retail hub. If anything, there is an air of optimism as the industry boosted by multiple factors is expected to be on a growth trajectory despite challenges.

In this **MRF 2022 post-show report Part 1** we have focused on **10 key takeaways** that will continue to drive retail forward:

Many factors are working in tandem pushing the **billion-dollar regional retail industry** forward

Tech-driven transformation is non-negotiable to stay relevant and resilient

Even as **data is powering retail** in an ever-changing world

People continue to be the **real differentiator**

The **power of emotion and experience** is a gamechanger

While **innovation** remains a key ingredient

Evolution and change are the winning formula

Meanwhile the **sustainability agenda** is getting serious

Amid an air of optimism, the **focus on 'now' and the 'future'** is crucial

So, what's the **next frontier for retail** – is it **Web3**, is it **metaverse**...

Red on to know more.

Do look out for more insightful takeaways in the MRF 2022 post-show report Part 2 that will be published in our January edition.

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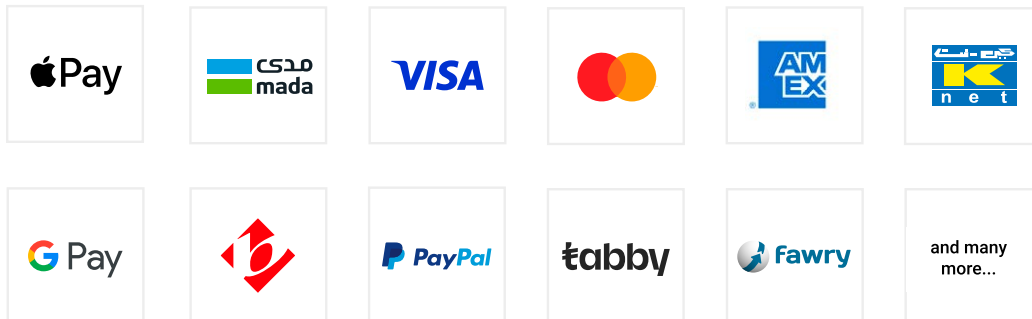
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The RetailME Awards 2022 Jury

Images RetailME Awards 2022: Celebrating Retail Excellence

The 12th Images RetailME Awards held alongside the Middle East Retail Forum was a night that celebrated retail excellence – practices, processes and people.

The Awards recognised achievements of retailers from the region who have had the courage to think out-of-the-box to bring innovative retail concepts and experiences driven by emerging technologies, fuelled by data and facilitated by people. In all 41 awards were given away during the ceremony.

Process of adjudication

After receiving over 135 nominations across 21 categories from retailers in the GCC in the form of comprehensive presentations the jury consisting of experts from the government, retail real estate business, technology conglomerate and solution companies deliberated carefully considering factors including but not limited to agility demonstrated, innovations introduced and results achieved, where evidence of overall success, profitable expansion and growth were reviewed. The final scores were then submitted to KPMG, who audited the scores and concluded on the awardees.



Laila Mohammed Suhail
CEO
Strategic Alliances & Partnership Sector, DET



deVere Forster
Chief Operating Officer
Dubai CommerCity



Mohammad Alawi
Chairman of the Executive Committee
Red Sea Markets Company



Mark Thomson
Retail Director EMEA
Zebra Technologies



Anurag Bajpai
Head of Consumer & Retail
KPMG Lower Gulf



Mohamed Galal
Chairman & MD
TSM AlSanad



Amitabh Taneja
Chairman & MD
Images Group



Beni Heiden
Executive Creative Director & Head of Sales
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Justina Eitzinger
Chief Operating Officer
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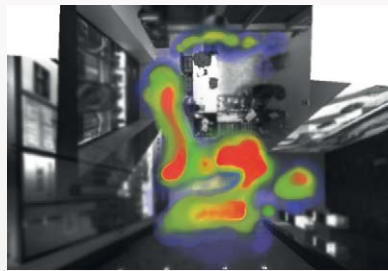
Empowering Retail with Technology

Vemco Group specializes in people counting and retail analytics, serving customers globally. Our data-driven solution assists retailers in better understanding their customers to create attractive spaces that improve the customer journey and experience.



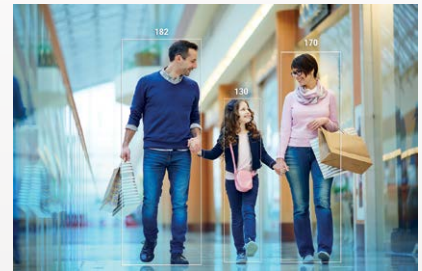
Visitor Counts & Analysis

Know your visitors to get a wide range of metrics & insights on the store's performance.



Heatmaps

Optimize your store layout & product placement by knowing which zones & entrances your customers prefer.



Demographics, Adult-Child Filtration & Group Count

Capture demographics of your visitors to target them with right products, advertising & displays.



Customizable
Dashboard



Tailor-Made
Reports



Real-Time
Data



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Compliant



Easy POS, BI,
& ERP Integration



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Inside

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SOFTWARE, TECHNOLOGIES AND EXPERTISE

to help traditional retailers and marketplaces transition from brick-and-mortar business model to online trade

WE PROVIDE UNIVERSAL SET OF TOOLS TO BREAK ONLINE

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Client App

Web

Surge

DELIVERY



Courier App

Dispatch

Rover delivery
(3rd party)

FULFILMENT



WMS¹

Picker App

FOUNDATIONS & BEST PRACTICES



Live BI²
reports



CMS³



ML⁴ Auto
order



ERP⁵



Support

¹ Warehouse Management System ² Business Intelligence (analytics) ³ Content management system ⁴ Machine learning ⁵ Commercial enterprise resource planning

OUR TECH STACK HELPS

Q-Commerce

To enhance unit economics, raising profitability and efficiency

Retail

To transform from offline into online, developing E-Grocery and Q-Commerce

Marketplace

To advance your current model, launching Q-Commerce

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Waste Management
Quality | Maintenance



Inventory Management
RFID | Stock Take
Reliability and Accuracy



CUSTOMER ENGAGEMENT
CRM|Clienteling|Loyalty
Appointment Management
Marketing automation



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Allocation & Replenishment
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Promotions & Pricing

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Frequentiel

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booxi

Appointment Management

netmera

Integrated engagement platform

Customer Engagement and Marketing Automation

DATASCAN

Inventory reliability via
stock take management

analyticalways

Stock Optimisation



In 2023 we will target further brick and mortar expansion in **Saudi Arabia, Kuwait and Qatar** while rolling out shipping in all the GCC countries through **Sandro.ae**.



2022: A significant year of growth and development for Sandro

Earlier this year (in July to be specific) French brand Sandro announced the opening of its relocated flagship store in The Dubai Mall. With hybrid retailing being the order of the day, along with its flagship store the brand also launched its website Sandro.ae in August. In addition, the brand is also eyeing brick and mortar expansion in the Kingdom of Saudi Arabia (KSA), Kuwait and Qatar.

For Sandro Middle East “2022 has been a significant year of growth and development through multiple channels,” shared Sandro CEO Isabelle Allouch.

Elaborating on the brand’s hybrid initiatives Allouch said, “From a global point of view, we have worked on the desirability of the brand. This includes in-depth work on the desirability of the collections and a better adaptation to our key markets where our items are sold. The route we are taking involves amplifying the brand, expressing our uniqueness and creating a new customer journey.”

“Our implementation of this was through developing our customer experience in brick and mortar with the deployment of new concepts and the opening of flagship stores (Champs

Elysée’s flagship store which opened in September). In addition, we are currently redesigning our website that will offer a more innovative and immersive experience.”

Hybrid is the way ahead

To begin with Sandro.ae allows customers to shop the same range that they have access to in stores, but with the option to either have items delivered at home or pick up from store. “Our store and online teams work together to ensure that customers are always aware that they can shop both online

“ **CDP** will enable us to engage the said customer in the preferred channel at the right time and in a meaningful manner. ”



Why is CDP appealing to retailers?

As the name suggests a Customer Data Platform (CDP) is a synthesis of three factors: customers, their data and software under which various smaller applications can run.

According to a study by the Customer Data Platform Institute the CDP industry reached a valuation of \$2 billion in 2022, up 25% year-over-year. Owing to the meteoric growth the industry is expected to reach \$20.5 billion by 2027. Interestingly, the same study revealed that in-process deployments are highest in Europe, the Middle East and Africa (EMEA).

That begs the question: Why is CDP, a nascent industry, primed for growth in the Middle East? The retail sector, where CDP adoption is particularly evident, offers a few answers. The broad consensus is that the retail sector's customer-centricity prompts the adoption of enabling technologies. So, CDP is seemingly appealing to retailers hoping to synchronise heightened consumer awareness, digital transformation and business outcomes while keeping customer experience or CX at the core.

If a few studies are anything to go by, CDP is the go-to solution to optimise routine retail tasks – such as loyalty offerings and brand messaging – that impact CX. A survey found that 43% of CDP adopters are geared towards developing loyalty programmes that ascribe incentives to more than just purchases.

In this exclusive Q&A Shehbaz Shaikh, Chief Retail Officer at REDTAG, a leading value fashion and homeware brand, laid out his perspectives on CDP and its drivers.

What is the foremost driver of CDP in the Middle East?

The foremost driver is most definitely the proliferation of data. In the Middle East, due to the world-leading internet penetration rate, the impact of Big Data has been immense and immediate. So, customer-centric sectors such as retail had to revisit the tools of



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