



Llywodraeth Cymru
Welsh Government

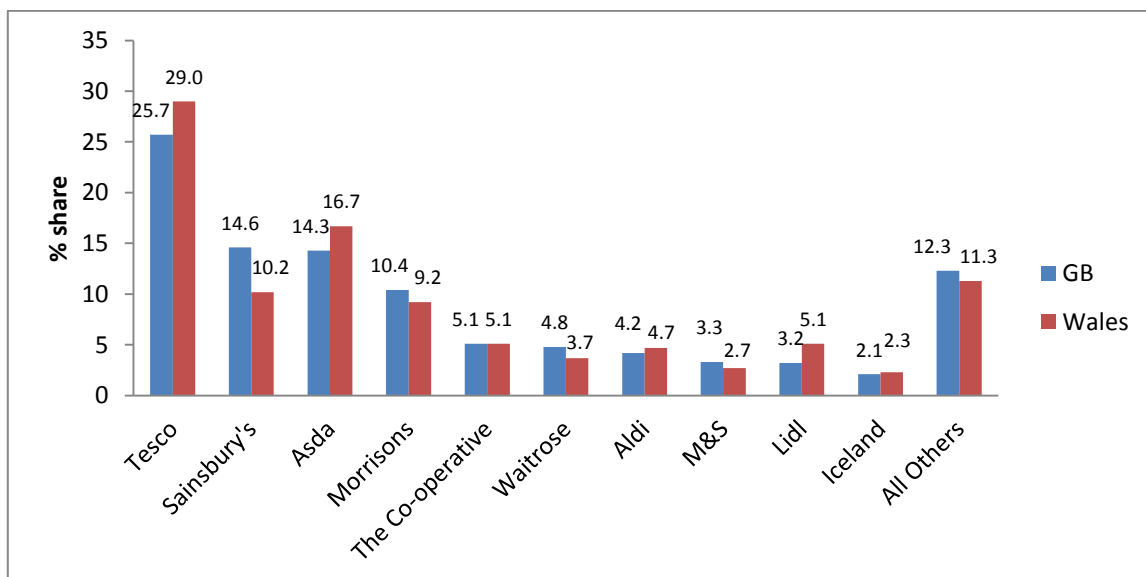
Multiple Retailer Profiles July 2015

The UK Retail Market Overview:

The UK Food and Grocery Market was valued at £105bn for the year to 24th May 2015, up by 0.3% on 2014. The market remains heavily concentrated, dominated by Tesco, Sainsbury's, Asda and Morrisons who between them have 65% share of the market, however all four have experienced sales decline during the year. Price remains a key area of competition in the market, with the major retailers engaged in price activity in an attempt to regain share from the Discounters who have performed so strongly in recent years.

In addition to the discounters, growth has also come from the convenience and online channels with shoppers using a combination of these to shop little and often. The major retailers are utilising multi-channel strategies in response, investing in Online Shopping/Home delivery and Click & Collect solutions and in the case of Sainsbury's, investing in the discount channel by virtue its joint venture with Netto.

Retailer Market Share GB vs Wales, May 2015:



Source: Kantar Worldpanel 52 w/e 24th May 2015

Multiple retailers dominate food and drink sales in Wales as in the total GB, with the top ten retailers accounting for 88.7% and 87.7% share respectively. Tesco, Asda, Aldi, Lidl, Iceland and Bargain Stores have a higher market share in Wales than in total GB and as such are important outlets for Welsh food and drink producers. In contrast, Sainsbury's, Morrisons, Waitrose and M&S under-trade in Wales vs total GB. Sainsbury's and Waitrose's shares in Wales are particularly low in comparison to their overall share due to the low number of stores in Wales, just 30 for Sainsbury's and 9 for Waitrose (June 2015). The Co-operative is an important retailer within Wales, serving many smaller towns and villages where there is no other multiple retailer presence, however it under-trades vs the UK overall.



Contact Details:

Head Office Address	New Tesco House, Delamare Road, Cheshunt, Hertfordshire, EN8 9SL
Head Office Contact Number	01992 632222
Website	www.tesco.com
CEO	Dave Lewis

Market Share and Store Information:

	Tesco	Ranking
*UK Market Share (% Value)	25.7	1 st
*Wales and the West Market Share (% Value)	29.0	1 st
Over/Under Trade in Wales (Index 100)	113	
Total Number of UK Stores	2669	
Number of Welsh Stores	119	
Wales as a % of Store Portfolio	4.5	

*Source: Kantar Worldpanel 52 w/e 24th May 2015

Store Formats:

Formats	Total UK		Wales	
	No. of stores	% of Portfolio	No. of stores	% of Portfolio
Express	1735	65.0	59	49.6
Metro	191	7.2	7	5.9
Superstore	487	18.2	34	28.6
Extra	250	9.4	19	16.0
Dotcom-only	6	0.2	0	0.0

Corporate Overview and Performance:

Tesco's core UK business comprises over 310,000 employees and over 3,500 stores, including their One Stop fascia. Over 60% of Tesco group sales and profits come from its UK business. Tesco's core focus has returned to its core UK food business, follows many years of global expansion and developing the non-food offer. This shift in focus is demonstrated by the sales of Blinkbox and Tesco Broadband, the closure of the Homeplus format with the final 6 stores to close during June 2015, which follows the decision to close 43 unprofitable stores across the estate earlier in the year. Tesco are also looking to sell Dunhumby, their "customer science" business that underpins generates insights from Tesco's Clubcard data.

Tesco continue to offer a wide range of Welsh food and drink, and have a higher market share in Wales than in GB as a whole, therefore offering a major volume opportunity for Welsh suppliers. However, it will be important for existing and potential suppliers to be aware of the current corporate strategy of Tesco, as it will have implications for them.

In 2014, Tesco's financial situation became suddenly critical in 2014 after it was found to have overstated earnings by £263m. In April 2015 Tesco announced pre-tax losses of £6.4bn, the biggest annual loss in its history. Value sales fell by 2.4% over the year to 26th April 2015. In terms of category performance, have lost share to competitors in all areas of grocery, including household and alcohol. The key priority for Tesco going forward is on restoring trust through a focus on customer service, availability and delivering value for customers.

Strategy:

Tesco have stated their aim is to regain their focus on serving customers, by refocusing the business under the following three operational headlines:

- Listening to, understanding and reaching out to customers to create the best possible offer
- Working with growers and suppliers to make great products, and helping to deliver the best value to customers
- Working across different channels to get those products to customers in the most convenient way

Core Priorities:

- Customers
 - To focus on the delivery of an offer with real value in all areas of price, quality, range and service.
 - More than 4,600 additional customer service roles have been created since September 2014.
- Product
 - To work with suppliers to source the best possible range of quality products which meet and anticipate customers' needs. A process of reviewing partnerships with suppliers is ongoing (this is taking place under what Tesco call their Category Reset Process).
 - More space has been given over to the top 1,000 lines in each store to increase availability.
 - In turn ranges are anticipated to be cut by around 30% over the next 18 months in order to simplify the offer in each category.
- Channels
 - To bring the best products to customers easily through a range of channels. Through a range of store formats, online, 24 hour shopping and click and collect.

Pricing and Promotional Strategy:

As part of the refocused strategy Tesco are reviewing and streamlining their ranges. In January 2015 Tesco launched a campaign promising price cuts on popular brands, beginning with a 25% cut in prices on over 300 brands. The campaign is part of a move away from the widespread price promotion of the past, towards lower everyday prices in order to fight back against the discounters who have attracted shoppers through their value offers. However, price promotion is still a key part of Tesco's offer to consumers – visit <http://www.tesco.com/groceries/specialoffers/default.aspx> where a complete suite of promotional offers is still being used in addition to price cuts. The main mechanics being utilised are Half Price and Multibuy promotions, plus some £1 offers and a just limited number of BOGOFs. Multibuy offers are offered across a range of products in order to allow shoppers to save money across their shop rather than encourage overbuying and hence wastage as BOGOF promotions had been criticised for.

Corporate Social Responsibility

Tesco's CSR policy encompasses the following 3 ambitions.

- To lead in **reducing food waste** globally.
 - Working with suppliers:
 - To minimise defects in the field
 - To use small or misshapen produce in Everyday Value or Goodness ranges
 - To extend code on products such as bread

- In store
 - Baking less bread more often in store to reduce wastage
 - Diverting surplus food to charity FareShare
- Helping Customers to Reduce Waste
 - Packaging redesigns for key products including food waste hints and tips
 - Replacing 'buy one, get one free' promotions on produce with price reductions and multi-buy offers across a range of products
- To **improve health** and through this help to tackle the global obesity crisis.
 - Making checkouts healthier through the removal of sweets, to allow customers to make healthier choices
 - Offering free cookery courses for children in partnership with the Children's Food Trust
 - Working with health charities such as Diabetes UK and the British Heart Foundation
- To **create new opportunities** for millions of young people around the world.
 - At Tesco:
 - Enable young people to build careers at Tesco through entry level programmes and leadership training.
 - In our communities:
 - Helping young people to develop employability skills through the Tesco Youth Academy
 - Out of work:
 - Providing employability training, work experience and where possible jobs to young people trapped in unemployment.

Regional Sourcing Policy:

Tesco source regional products through a number of local sourcing offices, including an office for Wales and the South West. Tesco list the most comprehensive range of Welsh food and drink products of all the major multiple retailers, comprising over 583 different products. Tesco offer their supply base the flexibility to supply directly into individual stores, groups of stores or into their RDC's.

The current range rationalisation programme (Category Reset Process) may impact upon Welsh brands as Tesco's focus moves towards delivering its core priorities. As part of the range reviews, leading Welsh dairy producer Rachel's yogurt range has already been delisted. Welsh suppliers therefore need to ensure now more than ever that they are offering a compelling proposition to the consumer in order to justify their position on shelf.

Tesco are the leading major multiple for Welsh products stocking 583 lines in June 2015, in part due to the larger store size vs competitors. Despite the Category Reset Process, the retailer has increased the number of Welsh SKUs by c10%, with 55 new products introduced (528 in September 2014).

During the same period Tesco have increased their Welsh supply base to 76 companies, up from 74.

Categories which outperformed in terms of listings growth include:

- Milk – increases in Welsh milk listings and Calon Wen's range has also increased in store
- Bakery – Just Love Food increased their range of cakes
- Beers, Wine & Spirits – due to new launches from SA Brains and Penderyn
- Hot Beverages – Welsh Brew have launched their coffee range

Welsh Depots:

Avonmouth
Widnes



J Sainsbury plc

Contact Details:

Head Office Address	33 Holborn, London, EC1N 2HT
Head Office Contact Number	0207 695 6000
Website	www.j-sainsbury.co.uk
CEO	Mike Coupe

Market Share and Store Information:

	Sainsbury's	Ranking
*GB Market Share (% Value)	14.6	2 nd
*Wales and West Market Share (% Value)	10.2	3 rd
Over/Under Trade in Wales (Index 100)	70	
Total Number of GB Stores	1200+	
Number of Welsh Stores	30	
Wales as a % of Store Portfolio	2.5	

*Source: Kantar Worldpanel 52 w/e 24th May 2015

Store Formats:

Formats	Total UK		Wales	
	No. of stores	% of Portfolio	No. of stores	% of Portfolio
Local	707	59	15	50
Superstore	Approx. 500	41	15	50

Corporate Overview and Performance:

Sainsbury's is the UK's second largest grocery retailer with 14.6% market share. The retailer has weathered the recession better than key rivals Tesco, Asda and Morrisons, although some share has been lost (0.4% May 2015). Sainsbury's focus on quality has helped in retaining their core older and more affluent shoppers, whilst the other 3 top multiple retailers have been hit harder by the growth of the discounters.

In addition Sainsbury's strong focus on their convenience and online operations is in line with changing consumer shopping behaviours around smaller basket sizes and convenience. The retailer now operates in excess of 700 Local outlets, with new store openings to continue at one to two per week in the coming year. In addition new formats are to be trialled, offering ranges and layouts to meet changing shopping behaviour.

In order to take advantage of the growth in the discount channel Sainsbury's have entered into a joint venture with Danish discount chain Netto, launching the first of 15 stores in November 2014, with the potential for the format to be rolled out across the country. The move is a return to the UK for Netto, having sold its UK store portfolio to Asda in 2010. The new Netto stores are based initially in the north of England where Sainsbury's underperforms, reducing the risk of undercutting the retailer's own stores.

There is also to be investment in the online channel, including Click and Collects and the retailer's first dark store in East London.

Strategy:

- Great products and services at fair prices
 - Quality leader
 - Strong value proposition
 - Growth opportunities in non-food and services
- There for our customers
 - A competitively advantaged supermarket portfolio
 - Convenience store network growth
 - Developing our groceries online channel
- Colleagues making the difference
 - Delivering great customer service

Core Priorities:

1. Great products and services at fair prices:

- **Quality leader**
 - Sainsbury's state their core purpose as providing great food and offering great quality is the key tactic in winning customer loyalty. Currently the retailer is undertaking a programme to improve the quality of 3,000 own-brand products, investing in key product areas.
 - Own-brand is still a major focus for Sainsbury's, although share has fallen to 49 per cent of their food sales. Taste the Difference however outperformed the total UK premium market in the last year, delivering sales growth of almost five per cent and annualised sales of £1.1 billion. Over 95 per cent of our Sainsbury's shoppers buy from the "By Sainsbury's" range.
- **Strong value proposition**
 - Sainsbury's are investing in lowering the prices of the everyday products that matter to our customers.
- **Growth opportunities in non-food and services**
 - Clothing, general merchandise and financial services remain profitable and continue to show good growth.

2. There for our customers:

- A competitively advantaged supermarket portfolio
 - Under-utilised space will be used to expand the clothing and general merchandise offer and working with concession partners to give more choice to customers.
 - A reduction in the store opening programme was announced, with new openings going forward predominantly focused on convenience stores.
- Convenience store network growth
 - Tesco has enjoyed 16% growth in sales through their convenience stores in the last year, as the trend towards frequent, local top-up shopping continues.
 - Convenience stores openings are to continue at one to two per week. 98 new convenience stores opening during the year, reaching a total of 707 stores.
 - Trialling different convenience formats to cater for varying shopping missions such as 'food to go' and both smaller and larger format convenience stores.
- Developing groceries online
 - Making online shopping easier across mobiles, tablets etc. and rolling out the Click & Collect service nationwide.

3. Colleagues making a difference:

- **Delivering great customer service**

- Opened a training college in Brixton in March 2014 and have run 360 courses in management skills, coaching and operations attended by over 3,600 colleagues.
- Since opening their seven Food Colleges, over 33,000 colleagues working on fresh food counters and in bakeries and cafés have received City & Guilds-accredited training.
- Announced a restructuring programme in stores in April 2015 to improve efficiency and customer service, anticipated to result in around 800 fewer roles.

Pricing and Promotional Strategy:

Sainsbury's continues to focus on private label and is making improvements to the quality of 3,000 private label products. £150m is being invested in price in the first half of 2015/16 in order to remain competitive with the other major multiple retailers.

Brand Match continues to be used to reinforce value credentials and reassure customers that their branded shop will be good value, having been matched against Asda's prices, including promotions.

Key offers are highlighted online at <http://www.sainsburys.co.uk/shop/gb/groceries/great-offers> where a range of promotional strategies can be seen, including Multibuys, Half Price and Price Reductions, plus Meal Deals.

Corporate Social Responsibility:

In Sainsbury's First Quarter Corporate Responsibility & Society Update in June 2015, the retailers stated the five following highlights.

- Healthier baskets:
 - Launched a number of products to inspire customers with new ways to eat fruit and vegetables, including a convenient platter containing five different portions of 5-a-day produce.
- Supplier training:
 - A group of South African growers came to the UK as part of a training and skills programme to explore the value chain from port to store.
- Energy efficiency:
 - Trialling an aerofoil technology on fridge systems to reduce the amount of cool air that escapes from fridge units and reduce the energy used to keep the fridge units cool.
- Charitable donations:
 - During 2014/15 a total of £52 million was donated to charities and other good causes both nationally and locally.
- Mentoring:
 - A second cohort of colleagues are participating in Race for Opportunity's cross-organisational Mentoring Circles, which promotes diverse representation and progression in the workplace.

Regional Sourcing Policy:

A focus on quality, provenance and sustainability is still stated by Sainsbury's as a point of difference from their competitors. All fresh, breaded and cooked chicken is sourced from the UK, as is fresh pork and fresh lamb in the main season, whilst fresh and frozen beef is British or Irish. Sainsbury's continue to work with long-standing Development Groups of farmers and growers to share best practice and develop more efficient and sustainable ways of working

British sourcing is a priority for Sainsbury's, with a target of doubling sales by 2020. The retailer is actively looking to source additional local/regional products – under their "Local First for Fresh"

scheme over 50 stores now take delivery from local suppliers of some fresh produce lines on the day they are harvested.

In 2015, Sainsbury's changed their regional buying policy for Wales. There is no longer a buying manager with responsibility for Wales, and instead all buying decisions regarding Welsh food & drink products and suppliers will be taken by category buyers at Sainsbury Head Office in London. In contrast to their stance on Wales, Sainsburys retain a regional buying resource in Scotland and Northern Ireland.

Sainsbury's have the third largest range of Welsh products amongst the multiple retailers, offering 292 SKUs, up from 273 in September 2014. Their Welsh supplier base has increased from 43 to 47 during this period despite there being limited regional sourcing activity by the retailer. There have not been any significant increases in individual categories but additional products have been added across the range.

Categories which outperformed in terms of listings growth include:

- Pies & Pastries – Peter's have extended their range
- Ready Meals – Both Authentic Curry and Welsh Pantry have launched products in store

Welsh Depots:

Bristol
Haydock



Contact Details:

Head Office Address	Asda House, South Bank, Great Wilson Street, Leeds, LS11 5AD
Head Office Contact Number	0113 243 5435
Website	www.asda.com
CEO	Andy Clarke

Market Share and Store Information:

	Asda	Ranking
*GB Market Share (% Value)	14.3	3 rd
*Wales and West Market Share (% Value)	16.7	2 nd
Over/Under Trade in Wales (Index 100)	116	
Total Number of GB Stores	600+	
Number of Welsh Stores	35	
Wales as a % of Store Portfolio	5.8	

*Source: Kantar Worldpanel 52 w/e 24th May 2015

Store Formats:

Formats	Wales	
	No. of stores	% of Portfolio
Supermarket	13	37.1
Superstore	19	54.3
Supercentre	3	9.7

Corporate Overview and Performance:

Asda is the number three grocery retailer in the UK (number two for total till roll e.g. non-food, general merchandise, electrical etc. behind Tesco). Sales growth in the last year has been below the market average, resulting in a fall in grocery share from 14.5% to 14.3%. Asda is owned by US retailer Walmart, the largest retailer in the world. Following their acquisition of Netto in 2010, Asda now have a store portfolio of over 600 stores and plan to focus new store openings in London and the South East of the country where the business is under represented. Asda is opening 11 new stores in the greater London region during Summer 2015, with plans for a further 150 by 2018. This is a move into 'High Street' stores for Asda. The move is a response to the growth within the convenience stores, which Tesco and Sainsbury's are successfully exploiting.

The business is currently implementing a five year £1bn+ investment plan to drive sales growth:-

- £200m in price cuts
- £750m in stores
- £250m in quality of own label products

Strategy:

- Improve the core business
 - Market leading value proposition
 - Low cost operating model
 - Stores for the future
- Increase access and reach
 - Leading online
 - Expand physical reach
- Expand into new markets
 - Extend the brand

Core priorities:

1. Improve the core business
 - Market leading value proposition
 - £1bn investment in lowering price over the next five years. Continuing Asda' long standing commitment to EDLP and fighting back against the discounters.
 - Low cost operating model
 - Savings to be funded through the "We Operate For Less" programme. Increasing the number of products in the Price Lock initiative, to deliver value on core products.
 - Stores for the future
 - £250m to be invested in "quality, style and design" by 2018.
2. Increase access and reach
 - Leading online
 - £750m investment in new stores, store extension and refurbishment in 2014
 - Expanding physical reach
 - Aiming to grow share in London and the South East through a focus on smaller store formats.
 - Developing online business by increasing Click and Collect to over 1,000 locations over the coming 5 years.
3. Expand into new markets
 - Extend the brand
 - Increasing the number of standalone filling stations to 100. Developing non-food sales through a focus on remodelling larger stores during 2015.

Pricing and Promotional Strategy:

Asda led the way before the rise of the discounters with their EDLP (everyday low price), volume driven strategy, with promotions taking the form of Roll Backs. Asda operates a simple and transparent approach to low pricing and is therefore simpler for consumers to understand when compared with the more confused offerings of the other 3 main retailers. Asda's current offers can be seen online at <http://groceries.asda.com/special-offers/top-offers>, where Roll Backs are seen alongside multibuy promotions across ranges in order to deliver value across a shop.

Corporate Social Responsibility:

Asda projects such as the Sustain and Save Exchange scheme, Asda Active Fun Days and charity schemes such as Tickled Pink for Breast Cancer are part of their CSR strategy. The overall aims of which are treating colleagues and suppliers more fairly, cutting down on energy use in stores, and helping people find healthy, affordable products.

Asda have been working with parent company Walmart since 2005 to reduce the company's impact on the environment in the three key areas of products, energy and waste.

Community Life

The Community Life scheme aims to make the communities around stores and depots better places to live and work for both colleagues and customers.

- Local Life
 - Engaging with local communities and supporting families through volunteering, fundraising, building relationships and giving time.
- Working Life
 - Focused on improving job prospects for local communities by providing the skills, knowledge and awareness needed to succeed in the workforce.
- Healthier Life
 - Making the lives of children healthier through family activities such as walking clubs, health awareness events and providing health checks in-store.
- Greener Life
 - Spreading awareness, building excitement and creating new ways to get involved in providing cleaner, safer environments for families.

Regional Sourcing Policy:

Local sourcing continues to be a focus for Asda, with customers telling the retailer that they want local food on shelves. Asda have a dedicated local sourcing and buying team whose sole aim is to identify local products and work with small suppliers to enable their products to reach our stores.

Asda acknowledge that local products often come from very small suppliers and have introduced measure to ensure that it is as cheap, easy and risk-free as possible for these suppliers to do business with Asda.

- Promise to support local products, doing everything they can to ensure they sell
- No costly technology needed – unlike other suppliers, local vendors don't need to have an electronic information system that processes and receives orders and payments, all they need is an internet connection.
- Reduced payment terms – to help ease cash flow problems
- Flexible delivering - a supplier can deliver direct to store, into our depots or via our unique local hub network.
- Local/small supplier packs – packs are given to all new local vendors which explain how to source barcodes; how to receive orders; how to generate invoices; what to do in the event of a product recall and who at ASDA can be contacted out of hours
- Access to Customer Planning colleagues who can assist with marketing, packaging and PR to help drive sales.

In March 2015 Asda appointed Matt Trigg as Sourcing and Events Manager for Wales, with the aim of increasing the amount of Welsh produce in its stores. Matt is responsible for obtaining Welsh products from local suppliers to sell in Asda's 34 Welsh stores as well as its cafés and canteens. Having worked in in-store managerial roles he was offered the newly created position after arranging for Welsh suppliers to showcase produce at Asda's Cardiff store in 2014. Matt has stated Asda's commitment to enhancing their local offer in Wales and their welcoming of support from the Welsh Government.

Asda have been one of the most active retailers in terms of Welsh sourcing since 2012. The retailer has the second largest range of Welsh products amongst the multiple retailers, at 457 SKUS, up from 424 at September 2014. In 2015 their range increased by 7.8% - Asda added resource to their buying team in Wales in 2014 which is likely to have contributed to this positive result.

Welsh Depots:

Skelmersdale / Chepstow
Bristol



Contact Details:

Head Office Address	Hilmore House, Gain Lane, Bradford, BD3 7DL
Head Office Contact Number	0845 611 5000
Website	www.morrisons.co.uk
CEO	David Potts

Market Share and Store Information:

	Morrisons	Ranking
*GB Market Share (% Value)	10.4	4 th
*Wales and West Market Share (% Value)	9.2	4 th
Over/Under Trade in Wales (Index 100)	88	
Total Number of GB Stores	666	
Number of Welsh Stores	33	
Wales as a % of Store Portfolio	5.0	

*Source: Kantar Worldpanel 52 w/e 24th May 2015

Store Formats:

Formats	Total UK		Wales	
	No. of stores	% of Portfolio	No. of stores	% of Portfolio
Local	153	23.0	3	9.1
Supermarket	513	77.0	30	90.9

Corporate Overview and Performance:

Morrisons is the UK's fourth largest food retailer and now operate over 660 stores. Overall share has fallen from 10.6% to 10.4% over the last year. Sales showed a decline of 1.2% compared to overall market growth of 0.3% in the last year - in line with the other top retailers, share is being lost to the discounters. In March 2014 the retailer announced plans to address this through cost savings of £1bn over 3 years, together with store layout improvements. In order to develop the business in line changing shopping behaviour the retailer has belatedly developed their online format (with Ocado), which is now available to almost half of the UK, and has also focused on developing the convenience store offering, with the number of M Local stores having passed 150. It has also launched its own loyalty card, called Match and More.

David Potts replaced Dalton Phillips as CEO in March 2015, making major changes immediately, with five senior directors being removed from his management board in a bid to make the business more 'lean'.

Of all the UK retailers, Morrisons retain a point of difference in terms of their higher degree of vertical integration e.g. in major categories such as meat where this strategy enables it to sell 100% British own brand fresh meat.

Pricing and Promotional Activity:

In August 2014 Morrisons launched the “I’m Cheaper” campaign, reducing prices on core products in order to reinforce the value message as part of the battle with the discounters. Ranges have been rationalised in the past year, with a 10% reduction in SKUs. Suppliers therefore need to work harder than ever to justify their position with the Morrisons range.

Promotional offers are highlighted at groceries.morrisons.com/webshop/getOffers where the price reductions can be observed under their New Low Price symbol, plus Multibuy promotions including mix and match offers on a range of fruit and veg or meat.

Strategy:

- Invest
 - Morrisons plan to invest £1bn over three years through:
 - Lowering prices on a permanent basis
 - Offering fewer but more impactful promotions
 - Making Morrisons own brand a competitive advantage
 - Continuing to improve quality and range
 - Making our stores easier and more pleasant places to shop
 - Rewarding customers through Match & More
 - Delivering focused, consistent customer communication
 - During 2014-15 the following progress was made:
 - Almost 200 awards achieved for Morrisons products
 - Cut the price of 1,200 products in the “I’m Cheaper” campaign
 - Launched Match and More
 - Invested £20m in chill chain to improve products quality
 - Improved customer experience in-store – removed trolley locks, extended opening hours
- Save
 - Saving £1bn over three years in order to invest in the value proposition:
 - £300m improving our end-to-end supply operations
 - £200m indirect procurement and loss prevention
 - £500m promotional investment and sourcing
 - During 2014-15 the following progress was made:
 - £50m saved on improved systems and focused on reducing shrinkage, waste and mark down costs and indirect procurement
 - Items on promotion reduced in second half of the year by 10.6%
 - 1st phase of store restructure completed
 - Range reduction – SKU count reduced by 10%
 - Productivity savings of £70m delivered through vertical integration, including transferring beef cutting and packing from stores to production sites
- Grow the Core Business and Accelerate Presence in New Channels
 - During 2014-15 the following progress was made:
 - Developed the online proposition to reach almost 50% of UK households
 - 57 M local stores opened
- Generate Cash
 - Generate £2bn of free cash flow over three years by adhering to strong financial principles
 - During 2014-15 the following progress was made:
 - Reduced capital expenditure to £520M
 - Improvement in working capital £206M
 - Property disposals generated proceeds of £448M

Corporate Social Responsibility:

1. Responsible buying

- Taking responsibility for supply chains
- Sourcing with care
 - 100% British own brand fresh meat sold in stores
 - 100% UK wild caught and landed seafood is required to be sourced from RFS vessels
 - Own brand suppliers that are Sedex members 100%

2. Healthy lifestyles

- Promoting health and wellbeing
- Providing choices to customers and colleagues
 - Change 4 Life partner
 - 1bn calories removed from Morrisons own brand Italian range
 - 26 pledges signed in the Government's Public Health Responsibility Deal

3. Our People

- Supporting colleagues to develop and grow
- Engaged colleagues provide better customer service
 - Colleague stability 90.4%
 - 75% Colleague Engagement Index: How engaged are colleagues?
 - Over 780,000+ training days delivered

4. Environmental management

- Protecting resources
- Effective cost management
 - 40% reduction in refrigeration gas emissions
 - 25.8% absolute reduction in carbon emissions (2005 baseline)
 - 98% store waste diverted from being sent direct to landfill

5. Supporting communities

- Contributing to community spirit
- Talking to customers about local issues that matter to them
 - £2.2m raised for charity partner Sue Ryder Incredible Hospice Care
 - Providing food waste tips via social media to 0.5m followers
 - 200,000 hours given to local community activity through our in-store Community Champions

Regional Sourcing Policy:

Morrisons do not currently have a regional sourcing team. All contact for regional producers is directed to the main buying team. Morrisons' long standing position as a fresh food retailer is supported by their commitment to British farm sourcing. Unlike other major multiples Morrisons work directly with farm suppliers supporting British producers and in turn, protect their supply.

- All Morrisons-branded fresh meat and counter meat is 100% British. Deal directly with farmers and are the only retailer in Britain to operate their own abattoirs.

- The majority of the vegetables sold throughout the year are British. When in season 100% British for strawberries, carrots, broccoli, swede, cauliflower, peas, cabbage, onions, potatoes, parsnips and sprouts.

Morrisons have increased their Welsh range by 6.4% to 199 SKUs, but they still have the lowest number of Welsh SKUs amongst the main multiples, highlighting the lack of development within their Welsh range.

Categories which outperformed in terms of listings growth include:

- Beers, Wines & Spirits has been their main area of focus with an additional 10 lines listed in this category where Conwy Brewery and SA Brains have mostly benefited. Welsh Government presented insight on this category to Morrisons in June 2014 which has contributed to Morrisons activity in this category.

Welsh Depots:

Middlewich - Cheshire

Bridgewater – Somerset

Contact Details:

Head Office Address	1 Angel Square, Manchester, M60 0AG
Head Office Contact Number	0161 834 1212
Website	www.co-operativefood.co.uk
CEO	Steve Murrells, Chief Executive Co-operative Food

Market Share and Store Information:

	The Co-operative	Ranking
*GB Market Share (% Value)	5.1	5 th
*Wales and West Market Share (% Value)	5.1	Joint 5 th
Over/Under Trade in Wales (Index 100)	100	
Total Number of GB Stores	2800+	
Number of Welsh Stores	152	
Wales as a % of Store Portfolio	5.4	

*Source: Kantar Worldpanel 52 w/e 24th May 2015

Corporate Overview and Performance:

The Co-operative is the 5th largest retailer in terms of market share and has a very strong presence across the UK, with over 2800 stores, making it the number one retailer in terms of store numbers. The Co-operative showed a decline in sales over the last year, with sales falling by 2.6, against overall market growth of 0.3%. Growth in convenience, top up shopping should benefit the Co-operative stores, but currently this is not the case and increased competition from the likes of Tesco and Sainsbury's with their high street formats is proving a challenge to the business.

Strategy:

The True North strategy was introduced in March 2013 and focuses on:

- Growing the Food business' core convenience estate
- Upgrading store formats
- Improving the product range
- Improving getting availability throughout the day
- Ensuring that prices are competitive
- Improving customer service

The Co-operative acquired 82 new convenience stores in 2014, taking the total convenience estate to 2,079 sites at year end, and sold 37 larger stores during the year, leaving 717 large stores in the business. This reflects a continued move towards the convenience channel, with the disposal of further larger stores likely and a target of doubling the small store estate. In June 2015 seven stores, including one in Chepstow, were sold to M&S, which will open as Simply Food stores later this year.

In terms of store upgrades, 336 stores had Generation 2 format refits during 2014, with positive sales uplifts. The Generation 2 format is focused on shopper mission and the fresh offer, aiming to meet the changing needs of shoppers. Plus the retailer's cost saving programme cut £93m from annual costs.

There will be continued investment in the own label range, with a commitment from The Co-operative to relaunch 3,800 own label lines.

In 2014 the Co-operative Group sold both its Farming Business and its Pharmacies.

Pricing and Promotional Activity:

The Co-operative continue to use the strap line “Here for You for Life” across the group. The Food business has been promoted through a series of television and press advertising, with an overall message to consumers aiming to convey the group’s credentials of value, quality and ethical trading. Advertising for the food business continues to focus on the message of convenience, such as top up shopping missions.

Corporate Social Responsibility:

Since 2009, The Co-operative have benchmarked their operations against the Corporate Responsibility Index (CRI) operated by Business in the Community (BitC). This is the foremost UK corporate responsibility benchmark and assesses management practice in a range of environmental and social impact areas, including:

- Community
- Environment
- Marketplace
- Workplace.

In 2014 ‘Platinum Big Tick’ status was retained with a score of 97%.

Regional Sourcing Policy:

The Co-operative offer 100% British own label fresh beef, chicken, milk, yogurt, block buyer and cheddar. The Truly Irresistible fresh lamb range is produced from native breeds by the Cambrian Lamb Group, made up of 21 producers who are part of the Cambrian Mountain Initiative.

All sourcing is done centrally through the category buyers at The Co-operative head office. Despite the lack of a regional buyer there is a clear commitment to regional ranging with the number of Welsh lines listed now standing at 265, up from 243 last year.

Categories which outperformed in terms of listings growth include:

- Bakery – Henllan have extended their cake range significantly in North Wales stores
- Beers, Wines & Spirits – SA Brain have extended their range of ales
- Pies & Pastries – Village Bakery have increased their range of pies and pasties in North Wales stores

The Co-op do not currently have a regional buying resource for Wales and it is understood the only area where they do have such a resource is in Scotland. In 2014,

Welsh Depots:

Halesowen – Frozen
St Helens – North Wales
Avonmouth – South Wales



Waitrose

Contact Details:

Head Office Address	Doncastle Road, Southern Industrial Area, Bracknell, Berkshire, RG12 8YA
Head Office Contact Number	01344 424 680
Website	www.waitrose.com
Managing Director	Mark Price

Market Share and Store Information:

	Waitrose	Ranking
*GB Market Share (% Value)	4.8	6 th
*Wales and West Market Share (% Value)	3.7	8 th
Over/Under Trade in Wales (Index 100)	77	
Total Number of GB Stores	338	
Number of Welsh Stores	9	
Wales as a % of Store Portfolio	2.7	

*Source: Kantar Worldpanel 52 w/e 24th May 2015

Store Formats:

Formats	Total UK		Wales	
	No. of stores	% of Portfolio	No. of stores	% of Portfolio
Little Waitrose	62	18.3	0	0
Supermarket	274	81.1	9	100
Dark Stores	2	0.6	0	0

Corporate Overview and Performance:

Waitrose is the 6th largest retailer in the UK and the 8th largest in Wales. Waitrose is part of the John Lewis Partnership, having been bought by the partnership in 1937. The retailer continues to demonstrate strong sales growth, with a strong increase of 4.5% in the last year, compared to overall market growth of just 0.3%.

During 2015 Waitrose plan to open 14 new stores, 7 being supermarkets and 7 little Waitrose stores largely outside London. The retailer also plans to invest in creating in-store excitement, such as initiatives introduced last year including grazing areas and new layouts for wine departments.

Waitrose' first national distribution centre is set to open at Magna Park, Milton Keynes in Summer 2015 and will handle the distribution of around 25,000 nationally available grocery and Home department lines found in Waitrose branches and in Waitrose.com.

The focus on developing the online channel is also seen by the opening in June 2015 of a second "dark store", offering online fulfilment to increase capacity in London.

Strategy:

Waitrose key values are encompassed within the 'Waitrose Way':

- Championing British produce
- Treading lightly on the environment and supporting responsible sourcing
- Treating people fairly
- Living well

In 2015 Waitrose aims to extend its store presence whilst improving price perceptions. The retailer is opening 14 shops across the UK this year, including seven new supermarkets and seven new little Waitrose convenience shops. Online has also been a key growth area for the business and Waitrose will continue to build capacity in this area.

Pricing and Promotional Activity:

Waitrose are to strengthen to focus on value through its 'Brand Price Match' against Tesco, offering 1,000 promotions a week, and more attention on own label pricing. This strategy is set to continue alongside the retailer's long term focus on quality.

The my Waitrose loyalty scheme launched in 2011 and extended in 2013 to offer savings on selected lines in store, is to be further utilised to build loyalty through value offers. In June 2015 Waitrose introduced Pick Your Own Offers for loyalty card holders, allowing them to pick 10 products from hundreds available and save 20% on them every time they shop. Waitrose sales jumped 6.2% to £132.2m in the week ending 5th July 2015 as the new loyalty scheme started to show its effects.

Corporate Social Responsibility:

John Lewis operate a CSR strategy across the whole group, which reflects fundamental changes in customer attitudes towards value, service and trust.

- Value for money
 - Customers are demanding better value for money with no compromise on quality and innovation
 - Essential Waitrose
 - Brand Price Match
 - Developing better value products of excellent quality through product innovation
- Service and convenience
 - Technological innovation is driving demand for flexible shopping according to customer lifestyles
 - Omni-channel services: online and on the move
 - New retail formats and service offerings
 - Enhanced network of Click & collect locations
 - Improved in-store experience
 - Greater online distribution capacity
 - Investment in supply chain and IT
- Trust
 - Customers are increasingly demanding that companies operate ethically and keep their promises
 - Improving supply chain practices
 - Increasing the product range from certified sustainable sources
 - Supporting UK supply

Regional Sourcing Policy:

Waitrose have a dedicated regional sourcing team, who buy local products for stores throughout GB - the two buyers are Oliver O'Mara and Tracey Marshall. Many small suppliers supply only one or a handful of Waitrose branches, and predominantly deliver direct to store. Waitrose define a product as 'local' if it is made within a 30-mile radius of the Waitrose branch where it is sold but there is some flex in this geographical definition. Local and regional produce is clearly labelled so customers can easily spot the provenance. Waitrose have a Small Producers' Charter which is guided by the following requirements:

1. Quality - Waitrose looks for suppliers who offer quality ingredients combined with very high standards of preparation and cooking skills.
2. Provenance and integrity - ingredients should be simple, recognisable and, where possible, sourced from the local region.
3. Presentation - check your product has visual appeal and appropriate packaging.
4. Offer point of difference - innovative products are most likely to complement the existing Waitrose offer.

Waitrose are long term supporters of local sourcing within Wales. Their range which comprises 249 skus has only increased by +1.2% over the last year though, which is the lowest of the main multiples. This is however unsurprising as they only actively source new suppliers/products if there are new stores opening in Wales. There have been no major changes in the number of Welsh products in any of their categories.

Contact Details:

Head Office Address	Waterside House, 35 North Wharf Road, London, W2 1NW
Head Office Contact Number	020 7935 4422
Website	www.marksandspencer.com
Directors Food	Steve Rowe Executive Director Food

Market Share and Store Information:

	M&S	Ranking
*GB Market Share (% Value)	3.3	8 th
*Wales and West Market Share (% Value)	2.7	9 th
Over/Under Trade in Wales (Index 100)	82	
Total Number of GB Stores	852	
Number of Welsh Stores	23	
Wales as a % of Store Portfolio	2.9	

*Source: Kantar Worldpanel 52 w/e 24th May 2015

Store Formats:

Formats	Total UK		Wales	
	No. of stores	% of Portfolio	No. of stores	% of Portfolio
Simply Food	504	59.2	5	21.7
Department Store/ Retail Park	297	34.9	15	65.2
Outlet	51	6.0	3	13.0

Corporate Overview and Performance:

At May 2015 Marks and Spencer was the 8th largest food retailer in GB, having been overtaken last year by Aldi and with Lidl close on its heels in 9th position. Whilst the retailer continues to struggle overall with declining clothing sales, the food side of the business continues to grow with sales up 3.1% in the last year, and share up from 3.2% to 3.3%. The Food division has recorded 22 consecutive quarters of like-for-like sales growth.

M&S invested £150m in a new website platform at the beginning of 2014, replacing the previous platform provided by Amazon since 2007. The relaunch was part of the group's £2.3bn three year strategy to develop M&S into an international, "multi-channel" retailer, connecting with customers through stores, the internet and mobile devices. The new site was developed to provide customers with a better browsing experience and an improved buying process.

In 2010 M&S announced a strategy to be more of a specialist in Food in order to differentiate the food business from the competition. Innovation is key to M&S's food offer, with 1,700 new products having been launched over the last year. Their "Adventures In" advertising campaign launched in September 2014, used new filming techniques and focused on the stories behind the food, successfully conveying innovation and food quality to shoppers.

Traditionally a 100% own brand retailer, branded lines were introduced for the first time in November 2009 and the branded range continues to expand, with M&S actively seeking to list more "Guest Branded" ambient lines in 2015 to differentiate their offer. In addition to this international brands have been introduced as part of the enhancement of the speciality offer.

Convenience is being addressed by changes in the main stores and development of the Simply Food format. Convenience is being delivered through tactics such as increased availability and ranging across stores, segmentation to ensure offers meet local demographics. The continued focus on the Simply Food fascia has meant that outlet numbers have now reached 504 including the 200 through M&S's partnership with BP. M&S bought seven stores from The Co-operative in June 2015, including one in Chepstow, which will be opened under the Simply Food fascia later in 2015.

Strategy:

M&S state their core values as:

- Fresh
- Speciality
- Convenience

Pricing and Promotional Activity:

In May 2012 introduced the Simply M&S range of 800 products in order to compete with Waitrose Essentials range, both offering quality at a reasonable price.

It has recently been reported by Reuters that M&S are investigating the launch of a loyalty card, which it is suggested is provisionally called 'Sparks' and could be launched in Autumn 2015. The card is proposed to reward food and general merchandise purchasers with benefits and offers.

Corporate Social Responsibility:

Marks & Spencer are now in the third phase of their Plan A Corporate Social Responsibility strategy, having launched Plan A 2020 in June 2014. The retailer recently announced progress for the first year, including rolling Plan A out internationally and developing the eco or ethical properties of its products. 64% of M&S products now have an eco or ethical quality over the market norm, including all palm oil used being covered by Roundtable for Sustainable Palm Oil.

Targets for the year June 2015 – June 2016:

- A Plan A customer campaign
- Improved transparency
- Scaling up projects such as Shwopping (donating an old item of clothing when buying something new)
- Rolling out Plan A on a localised basis
- Working with the Consumer Goods Forum and the World Economic Forum

M&S has some of the strictest criteria for suppliers both in terms of factory standards but also the sourcing of raw ingredients and ethical codes of practice. It is these standards that have ensured that M&S has maintained its reputation for excellent quality. As part of the current strategy for the food business, M&S has been working with suppliers, as the business recognises the benefits for longer term supplier collaboration.

Regional Sourcing Policy:

Part of the Plan A strategy is the M&S Farming for the Future programme. This programme includes a commitment to provide seasonal British lamb all year round. The range includes Brecknock Hill Cheviot lamb (available in M&S stores from September to February) that is reared in the Brecon Beacons. Pembrokeshire based Capestone Organic Poultry have also been working with the retailer since 1999, now supplying organic chicken, poussin and free range bronze turkeys at Christmas time.

In April 2015 M&S launched a range of Summer food under the sub-brand Tastes Of The British Isles. Products included recipes that date back centuries, such as Shropshire Fidget Pork Pie, and dishes that are a twist on British classics such as Ploughmans-inspired Cheese & Pickle Burger. The range is supported by an advertising campaign named "Adventure in Britishness", as part of the overall "Adventures In" advertising strategy launched last year.

More recently, M&S have embarked on a regional sourcing initiative which has focused on artisan British "guest brands". Guest brands must offer M&S absolutes in terms of offering special and different products, and suppliers/brands must demonstrate they are authoritative experts in their field and not be available elsewhere. Finally, they must be absolutely delicious and the branding must be beautiful and in keeping with the look and feel of their food halls. Several Welsh suppliers have been listed under this initiative this year, including Eboni ac Eifori, Hilltop Honey, Bacheldre Water Mill and there is currently a Meet the Buyer process underway which paves the way for other suppliers to be considered.

As an additional strand to their regional strategy, M&S are seeking to highlight the British regionality of their current food offering sourced from regional manufacturers and sold through their own brand. This may present some opportunities for Welsh manufacturers already supplying M&S to benefit from any PR generated.

Recent audits have found 36 Welsh SKUs within M&S Welsh stores. As would be expected for the own label focused retailer, the majority of SKUs are M&S brand, including milk, beef and lamb, cheese and M&S label Conwy Brewery ale. Branded SKUs identified were Eboni ac Eifori Taffi Sauce, Halen Mon Sea Salt and 2 cheddars from Llandyrnog Creamery.



Contact Details:

Head Office Address	Holly Lane, Atherstone, Warwickshire, CV9 2SQ
Head Office Contact Number	0844 406 8800
Website	www.aldi.co.uk
Joint Managing Directors UK	Dan Ronald and Giles Hurley

Market Share and Store Information:

	Aldi	Ranking
*GB Market Share (% Value)	4.2	7 th
*Wales and West Market Share (% Value)	4.7	7 th
Over/Under Trade in Wales (Index 100)	112	
Total Number of GB Stores	550+	
Number of Welsh Stores	36	
Wales as a % of Store Portfolio	6.5	

*Source: Kantar Worldpanel 52 w/e 24th May 2015

Corporate Overview and Performance:

Aldi is now the 7th largest retailer in UK, having continued to grow over the last year with sales up 22.9%. Share is even higher within Wales, at 4.7% compared to 4.2% in total GB. Aldi have successfully attracted new shoppers through campaigns such as 'Like Brands' promoting the quality of their products, 'Swap and Save', "Super 6" offers on fruit and veg, all highlighting the value of their offer.

In May 2015 Aldi UK appointed 2 new managing directors, replacing Roman Heini and Matthew Barnes. Both new managing directors, Dan Ronald and Giles Hurley, have been with Aldi since graduating from university. Previous joint MD Matthew Barnes has taken the position of CEO.

Strategy:

- Continued rapid expansion, at 50-65 stores per year, with a target of 1,000 stores by 2021
- In-store bakeries being trialled to compete with Lidl
- Convenience store openings to continue following the successful trial in Kilburn, London
- Continued focus on British origin for fresh food (meat, fruit/veg)
- Whilst remaining own label focused, introduction on more branded lines
- Advertising campaign conveying value and quality messages

Suppliers approaching Aldi need to be aware of the focus on price and quality. Aldi undertakes rigorous benchmarking tests against the products they consider to be best in class for a given price point. One of the main reasons why the discounters can offer quality at such competitive prices is that they take a lower margin on the selling price compared to the other multiples.

9 new stores are set to open in the London area this year. Aldi are also reported to be planning a move into the online channel.

Regional Sourcing Policy:

Whilst Aldi do not have a buyer directly responsible for Welsh sourcing, they state their commitment to building strong relationships with local suppliers and that they source, wherever possible, the very freshest produce from the very best local suppliers. In contrast to Wales, Aldi does have a regional buying resource in Scotland.

Recent store audits have identified 37 Welsh SKUs within Welsh Aldi stores, including own label milk and cheese, bakery lines from Braces and Popty Cae Groes, SA Brain Ale and Edwards of Conwy Sausages.

Due to the current level of Aldi's growth and future growth estimates, Aldi's strategy is to recruit more suppliers for all food and drink categories to supply their own label ranges. This will create additional opportunities for Welsh Food & Drink suppliers and Welsh Government have run Introduction to Aldi programmes in recent years to enable interested Welsh suppliers to be considered by Aldi when tenders emerge.

Welsh Depots:

Neston, Wirral – North Wales
Swindon – South Wales
(Cardiff depot to open in 2017)



Contact Details:

Head Office Address	19 Worples Road, Wimbledon, London, SW19 4JS
Head Office Contact Number	0370 444 1234
Website	www.lidl.co.uk
Managing Director UK	Ronny Gottschlich

Market Share and Store Information:

	Lidl	Ranking
*GB Market Share (% Value)	3.2	9 th
*Wales and West Market Share (% Value)	5.1	Joint 5 th
Over/Under Trade in Wales (Index 100)	159	
Total Number of GB Stores	608	
Number of Welsh Stores	52	
Wales as a % of Store Portfolio	8.6	

*Source: Kantar Worldpanel 52 w/e 24th May 2015

Corporate Overview and Performance:

Lidl enjoy continued strong growth, with value sales having grown 14.9% in the year to May 2015, and share up from 2.8% to 3.2% across the UK as a whole. Share is however higher than average within Wales due to the high proportion of stores located within Wales.

The retailer has focused on conveying a quality message through the “Surprises” advertising campaign, which shows consumers trying food before discovering it is from Lidl. In line with Aldi, the discounter is aiming to widen the appeal to include more upmarket shoppers. As part of the focus on food quality Lidl have appointment Michelin Star chef Kevin Love as Executive Consultant Chef.

Strategy:

- Lidl have strengthened their fresh ranges by introducing in-store bakeries and expanding their fruit and vegetable ranges
- Wine departments have been enhanced, with new fixtures and information to make the category easier to shop
- Investment in supply chain to improve efficiency

Corporate Social Responsibility:

Some of the local and nationwide initiatives and charities supported by Lidl include:

- CLIC Sargent
 - £358,900 already raised, aim to raise £1m over three years.
- STV Appeal
 - Working with six major charities to change the lives of Scotland’s most vulnerable young people.
- Pride of Britain Awards
 - Sponsor of the Pride of Britain Awards.

- Health Factor Programme
 - The Lidl Health Factor Programme launched in September 2013 and is designed to be a fun way of getting across the benefits of exercise and healthy eating to Primary School children across Scotland.
- Environmentally Friendly Practices
 - UK stores collectively recycle around 40,000 tonnes of cardboard and plastic a year. Applying a small fee to plastic shopping bags encourages customers to re-use bags. Store warehouses, staff areas and office buildings have intelligent lighting systems that only turn on when they are needed. Working on implementing a ground breaking system that harnesses the heat caused by refrigeration units and channels it into store heating system.
- Marine Stewardship Council (MSC)
 - Offer customers a wide selection of MSC-certified products from deep frozen, refrigerated and tinned goods.
- Fairglobe
 - Fairglobe is a brand devised by Lidl to support the Fairtrade movement, helping to improve the quality of life in less developed countries such as Ethiopia, Honduras and Papua New Guinea.

Regional Sourcing Policy:

Lidl have offered a number of Taste Of promotions, featuring Taste of Greece earlier in 2015 and currently offering Taste of the South West.

Lidl currently offer 29 Welsh SKUs within their Welsh stores, including Welsh milk, Braces bread, SA Brain Ale, Castle Dairies butter and Pembrokeshire Cheese.

Welsh Depots:

Bridgend – South Wales
 Runcorn Cheshire – North Wales

Contact Details:

Head Office Address	Second Ave, Sealand, Deeside, Flintshire CH5 2NW
Head Office Contact Number	01244 830100
Website	www.iceland.co.uk
Chief Executive	Malcolm Walker

Market Share and Store Information:

	Iceland	Ranking
*GB Market Share (% Value)	2.1	10 th
*Wales and West Market Share (% Value)	2.3	10 th
Over/Under Trade in Wales (Index 100)	110	
Total Number of GB Stores	850+	
Number of Welsh Stores	52	
Wales as a % of Store Portfolio	6.1	

*Source: Kantar Worldpanel 52 w/e 24th May 2015

Store Formats:

Formats	Total UK		Wales	
	No. of stores	% of Portfolio	No. of stores	% of Portfolio
Freezer Centre	846+	99.3	50	96.2
Food Warehouse	6	0.7	2	3.8

Corporate Overview and Performance:

Iceland has suffered a fall in value sales over the year to May 2015. Sales are down 0.2% against total market growth of 0.3%. However share remains static at 2.1% of the total UK grocery market. Share is higher than average in Wales due to the relatively high proportion of stores in comparison to the Welsh population.

Strategy:

Having launched the larger Food Warehouse format in September 2014, the number of stores is set to increase rapidly from the current 6 to a medium term target of 50. Richard Walker has been appointed as Managing Director for the format.

The retailer offers a very high proportion of own label SKUs and is investing in innovation within the range in order to drive the frozen food market.

Due to changes in shopping behaviour, Iceland introduced Click & Collect in April 2014, allowing shoppers to order online and collect from 540 of their stores.

Pricing and Promotional Strategy:

Iceland's core strategy has been founded on their value offer, with round pound pricing and price promotions across the range.

Having focused on the value message for many years, the retailer's marketing strategy is moving towards a focus on quality and innovation. The current multimedia campaign #PowerofFrozen aims to educate consumers about the benefits of frozen in retaining nutrients, and Iceland's product innovation plans.

Regional Sourcing Policy:

Iceland offer only a limited number of Welsh products. Just 16 SKUs are currently offered across the bakery, pies & pastries and water categories. The brands recorded in recent Welsh Government audits were Braces, Peter's, Brecon Carreg and Trederwen Essence.



Contact Details:

Head Office Address	Farmfoods Freezer Centres, 1507 Coventry Road, Yardley, Birmingham, B25 8LW
Head Office Contact Number	0121 700 7160
Website	www.farmfoods.co.uk
Managing Director	Eric Herd

Store Information:

	Farmfoods
Total Number of GB Stores	300+
Number of Welsh Stores	22
Wales as a % of Store Portfolio	7.3

Corporate Overview and Performance:

Farmfoods have taken advantage of changing shopping habits and the popularity of discounters, recording turnover of £852m in 2014, a rise of 18%, with pre-tax profits up a huge 38% to £21m. Industry data also showed that Farmfoods was the fastest growing food retailer in Britain at one stage in 2014. The retailer is well represented in Wales, with a high proportion of store located in Wales.

Strategy:

- Branded Offer
 - Farmfoods continue to introduce more national brands in order to attract new shoppers to their stores.
- Investment in Efficiency
 - Streamlining of processes both in-store and through the supply chain will continue in order to further grow operating profits.
- Value Proposition
 - Farmfoods are faced with both opportunities and threats from the growth in the discount sector, with increased interest from consumers, but also increased competition.
- Range Development
 - As a frozen food specialist, reviewing the frozen range will remain important, whilst developing the fresh offer as Iceland have done in recent years.
- Portfolio Expansion
 - New store openings to be focused on the South of England in order to expand their presence.

Regional Sourcing Policy:

Audits of Farmfoods range have not recorded any Welsh products to currently be available within their range.



Contact Details:

Head Office Address	Hygeia Building, 66-68 College Road Harrow, Middlesex, HA1 1BE
Head Office Contact Number	020 8426 3700
Website	www.spar.co.uk
Managing Director	Debbie Robinson

Corporate Overview and Performance:

As the world's largest Symbol group, Spar is the most prevalent food retailer in the UK, with more than 2,400 Spar outlets across the country.

As well as many independently owned Spar stores in Wales, Blakemore Retail, the retail arm of A.F. Blakemore & Son Ltd, operate stores in Wales with a total of 295 Spar stores located across England and Wales.

AF Blakemore Strategy:

AF Blakemore Strategy – The Blakemore Way:

- Maximise staff potential and their contribution to the company's success
- Give great service to all our customers and add value to our trade partners
- Make a significant, positive contribution to the community
- Attain excellence in everything we do
- Behave with honesty and integrity in all our relationships

Regional Sourcing Policy:

Spar has the largest range of Welsh products amongst all the retailers. Spar benefit from locally owned stores which place a strong emphasis on offering Welsh produced products. Spar's range has increased by 3.7% over the last year which represents good growth levels considering the number of Welsh products which were already available in store.

There are a number of key categories which have outperformed in terms of listings growth as suppliers increase their range in store; the following categories have performed well due to new product launches:

- Beers, Wine & Spirits – Cwrw Cader (Based in Snowdonia) have achieved a listing for five ales
- Condiments – Dangerous Food Company launched a range of chilli jams
- Cooked Meat – Steve Griffiths Quality Foods have launched a range of cooked meats

Owner of three Eurospar and Spar stores in Dolgellau, Blaenau Ffestiniog and Pwllheli, Conrad Davies was responsible for launching Welsh Food and Drink Fortnight in the stores three years ago. The Davies family are passionate about Welsh food and drink and feature over 70 local producers. Last year 100 Spar stores across Wales joined together to celebrate Spar Welsh Food and Drink Fortnight from August 22nd to September 7th 2014. 19 independent stores and 81 Spar stores run by Blakemore Retail joined the celebration of Welsh food and drink products. Thirty Welsh food and drink producers have also signed up to take part in special in-store promotions, product sampling and a host of other activities during the fortnight.

**Contact Details:**

Head Office Address	Titan Court, 3 Bishop Square, Hatfield Business Park, Hatfield, AL10 9NE
Head Office Contact Number	01707 227 800
Website	www.ocado.com
CEO	Rose Price / Kevin Hancock

Corporate Overview and Performance:

Ocado is the world's largest dedicated online grocery retailer, however it operates currently only in the UK where it is the 4th largest online grocery retailer. Their presence online only has allowed them to be focused on this key channel as consumers choose to shop online. The company became a PLC in July 2010.

Alongside its continued arrangement with Waitrose to supply Waitrose products to its customers, Ocado now also has a growing own label range as it seeks to reduce its dependence on Waitrose. It also operates Morrisons' online delivery service after the companies agreed a deal in 2013. The deal led Ocado to its first ever profit, at £7.2million pre-tax profit for the year ending November 2014, following a loss of £12.4million in the previous financial year. In the last financial year revenue was up 19.8% and gross retail sales were up 15.3%. The online retailer also had a very strong Christmas 2014, with sales up 14.8% year-on-year.

Ocado moved into Click & Collect in September 2014, offering the service as a trial close to their head office in Hatfield.

In June 2015 it was reported that Ocado is close to signing a deal with an international retailer that will allow the online grocer to expand outside the UK for the first time. Earlier this year Ocado reported that it had developed a system that allows it to sell its technology to overseas retailers. Ocado has in the past been linked with deals with Carrefour of France and Safeway of the US.

Strategy:

- Range Expansion
 - Further increasing the number of SKUs offered is a priority for Ocado, with the range having already increased from 34,000 SKUs in 2013 to 43,000 in 2015.
- Value Proposition
 - The retailer is offering price matching against branded lines on Tesco.com.
- Improving Customer Service
 - Improving delivery reliability, product availability and freshness, and ease of ordering.
- Increasing Capacity
 - Opening a third and fourth Customer Fulfilment Centre by mid-2017.
- Morrisons Partnership
 - Embarked on a joint venture with Morrisons in January 2014, supporting the bricks and mortar retailer's move into the online channel.

Regional Sourcing Policy:

Ocado launched their Welsh "Shop Within a Shop" in time for St David's Day 2015. The project brought together existing Welsh products and also listed new brands in order to enhance the Welsh offer. The activity as part of the Welsh Government's Meet the Buyer process significantly increased the number of Welsh SKUs offered on Ocado's website. Ocado has approximately 140 Welsh skus in its portfolio.



Contact Details:

Head Office Address	Patriot Court, 1-9 The Grove, Slough, Berkshire, SL1 1QP
Head Office Contact Number	020 8636 9200
Website	www.amazon.co.uk
Managing Director UK	Christopher North

Corporate Overview and Performance:

Amazon UK currently offer ambient grocery products through the Grocery department of their website. Industry reports suggest that the AmazonFresh concept will be launched in the UK within the next 2 years, following the introduction of the service across a number of US cities and the imminent introduction in Germany. The AmazonFresh service would extend the food range to include a full range of fresh and frozen foods. In the US, shoppers who place an order by 10am get a delivery from an Amazon van in time for dinner. Delivery is free for those spending more than \$35 (£22), but customers must be members of Amazon Prime, which comes with an annual fee of \$300 (£190). Amazon, however face stiff competition from the already established players in the UK online grocery channel.

Amazon's food offer is fulfilled both direct from Amazon and via third party sellers, including gift and hamper companies or the direct from the manufacturer. Amazon looks likely to expand its own brand elements into food, according to reports in the press in May 2015. The brand was used unsuccessfully for nappies at the end of 2014, but industry experts suggest that further FMCG lines may be introduced.

The online retail giant is now pushing into everyday food and drink products such as milk and cereal.

Regional Sourcing Policy:

Amazon currently offer around 100 Welsh SKUs from the following brands: Bachelldre Watermill, Calon Lan, Daioni, Gwynnedd Confectioners, Halen Mon, Hilltop Honey, Parsons Pickles, Patchwork Pate, Penderyn, Welsh Hills and Welsh Lady.

Welsh Depots:

Swansea

Rugeley, Staffordshire



Contact Details:

Head Office Address	The Vault, Dakota Drive, Estuary Commerce Park, Speke, Liverpool, L24 8RJ
Head Office Contact Number	0151 728 5400
Website	www.bmstores.co.uk
CEO	Simon Arora
Trading Director	Bobby Arora

Store Information:

	B&M
Total Number of GB Stores	450+
Number of Welsh Stores	29
Wales as a % of Store Portfolio	6.4

Store Formats:

Formats	Wales	
	No. of stores	% of Portfolio
Bargains Store	24	82.8
Home Store	4	13.8
Home Store with Garden Centre	1	3.4

Corporate Overview and Performance:

B&M was formed in 1978 and is now one of the leading variety retailers in the UK. The business has grown from the first store in Blackpool, to a portfolio of more than 450 stores, employing around 20,000 people. B&M offer a wide range FMCG brands and non-grocery products at low prices.

B&M's revenue increased by 29.5% in the financial year ending 28th March 2015, reaching £1.65bn. Pre-tax profits increased by 55.7% to £135.0m. The Arora brothers, CEO Simon and Trading Director Bobby, sold 60% of the company to US investor Clayton, Dubilier & Rice in late 2012. The business debuted on the London Stock Exchange at a value of £2.7bn in 2014. Sir Terry Leahy joined the B&M board as Chairman in December 2012. 54 new stores opened in the latest financial year, 4 of which were within Wales.

Strategy:

B&M boss Simon Arora announced in May 2014 the business' plans to continue to open stores at a rate of 40 a year, with a target of around 800 stores. B&M's growth strategy is modelled on that of Dollar General, the biggest retailer in terms of number of outlets in the US. Last year Kathleen Guion joined the B&M board, having previously held roles as division president and executive vice president of Dollar General from 2003 to 2011.

Corporate Social Responsibility:

B&M state Corporate Social Responsibility as a key part of the B&M business, due to its importance to their reputation in the market place, customers and colleagues.

They key areas of focus are:

- Suppliers
 - Ensure that suppliers in the Far East comply with local health and safety legislation that respect employee rights. Supplier relationships often date back well over 10 years.
- Health and Safety
 - Committed to ensuring that the business has appropriate health and safety standards across the store portfolio and warehouses.
- Environment
 - Stores send all their waste back to the retailer's Recycling Centre where all paper, cardboard, plastic material, wood and metal is recycled. Upgrading the HGV fleet, with tractor units having been upgraded to the latest fuel efficient engines, and investment in a fleet of Double-Deck trailers to minimise road miles. Ongoing investment in-store in more efficient HF lighting, to reduce carbon footprint and fuel costs. Also participate in the national Electrical Appliance and Battery Recycling schemes.
- Colleagues
 - In addition to an aim to make B&M a fun place to work, stores regularly have charity fundraising events and are keen to engage with the local community.

Regional Sourcing Policy:

B&M currently offer a limited number of Welsh products, with just 10 SKUs found in audits in June 2015. These products were predominantly water SKUs under the Trederwen Essence and Celtic Spring brands, 2 Parsons Pickles lines and 1 SA Brain ale.



Contact Details:

Head Office Address	T.J. Morris Limited, Portal Way, Liverpool, L11 0JA
Head Office Contact Number	0151 530 2920
Website	www.homebargains.co.uk
Managing Director	Tom Morris

Store Information:

	Home Bargains
Total Number of GB Stores	370+
Number of Welsh Stores	43
Wales as a % of Store Portfolio	11.6

Corporate Overview and Performance:

Home Bargains is the trading name of TJ Morris Ltd. Home Bargains are a leading variety discounter, offering “top brands at bottom prices”. The business remains family-owned and run, having been founded by Managing Director Tom Morris over 30 years ago. Since opening the first store in Liverpool, the business has grown to become one of the biggest privately owned companies in the UK. The company now operate over 370 stores and employ more than 10,000 staff.

Strategy:

The business operates on the key principle of selling branded goods at the lowest prices possible. The company intends to continue its rapid growth and has ambitious expansion plans. Over the next five years, TJ Morris plans to grow to 700 stores, employing over 20,000 staff. TJ Morris' purpose-built £35million warehouse and distribution was completed in 2010 at the company's headquarters in Gillmoss, Liverpool, to facilitate its rapid expansion. The distribution centre currently services all of the Home Bargains stores across the UK.

Corporate Social Responsibility:

Home Bargains support a range of community organisations and projects including:

- Business On the Move
 - An innovative and fun educational board game designed to excite young people about business and the UK's supply chain.
- Young Enterprise NW Final
 - The company support Young Enterprise in schools and universities across the North West and supported the running, preparation and coordination of this year's North West Start Up Programme Final.
- Alder Hey Children's Hospital
 - Alder Hey Children's charity Christmas cards have been sold in Home Bargains stores for the past six years. Last year £21,562.50 was raised following a competition for Primary School children to submit their designs for the cards.
- Tranmere Rovers Sponsorship
 - Home Bargains will be the new shirt sponsor for Tranmere Rovers FC from next season onwards.
- 10 year Commitment to supporting the NSPCC
 - Home Bargains have sponsored the NSPCC for the last 3 years, and will continue to do so for the next 7 years.

- Other causes supported include:
 - St Andrew's Hospice, Variety Children's Charity, Alheimers Society, Cystic Fibrosis, Merseyside Children's Holiday fund, Marina Dalglish Appeal for cancer treatment, Lord Mayors Appeal – Futures for kids worldwide, Knutsford Heritage Centre, Macmillan Nurses, The Sheffield Children's Hospital Charity
- Reducing Energy Consumption by up to 30%
 - Investing in the latest low energy lighting, automatic sensing and A/C controls, has resulted in a reduction in electricity consumption of more than 30%.

Regional Sourcing Policy:

Home Bargains offer a very limited number of Welsh products within their Welsh stores. Audits in June 2015 found only 5 SKUs, featuring the brands Parsons Pickles, Trederwen Essence and SA Brain.

All buying is done centrally through the Liverpool head office and products are delivered to a single drop-off point at the Liverpool distribution centre. Home Bargains operate an open buying policy, with no need to make an appointment. They commit to always see suppliers if they visit their head office and give a decision there and then.

Welsh Depots:

Liverpool (1 national depot)



Contact Details:

Head Office Address	Wellmans Road, Willenhall West Midlands, WV13 2QT
Head Office Contact Number	0121 568 7000
Website	www.poundland.co.uk
CEO	Jim McCarthy

Store Information:

	Poundland
Total Number of GB Stores	575
Number of Welsh Stores	28
Wales as a % of Store Portfolio	4.9

Corporate Overview and Performance:

Poundland are the UK's largest single price retailer. The retailer's key proposition is offering their promise of 'Amazing Value' through supply chain efficiency and the 1,000 'top brands' within a range of 3,000 food and non-food SKUs.

The business became a PLC in March 2014 debuting on the London Stock Exchange at a value of £750 million. Poundland's agreed to pay £55m for rivals 99p Stores in February 2015, however the deal is now under investigation by the Competition and Markets Authority (CMA) over potential issues with 92 stores, more than a third of 99p Stores's portfolio.

Strategy:

- Strengthen position as Britain's biggest single price retailer
 - With over 3,000 SKUs in-store across 17 categories including food and non-food, Poundland is continuing to expand its offer
 - Demonstrate "amazing value" through driving supply chain efficiency, flexibility of approach and positioning as a "low cost to serve" operator
- Accelerating growth of food and moving into new areas
 - Food is of increasing importance to Poundland, despite having a proportionally lower share of SKUs
 - The majority of stores now feature chiller cabinets allowing for the further expansion of ranges. FMCG categories account for over 50% of sales
- Retaining flexibility of ranges
 - Getting the right combination of newness, quality and value is key to Poundland's success
- Growing importance of brands
 - 1,000 products are 'top brands'. These drive footfall and have a halo effect by increasing consumer confidence in other products
- Driving growth through portfolio expansion
 - Poundland is targeting a minimum of 50 store openings per year and plans to take its Dealz fascia to Europe in 2015 following success in Ireland

Corporate Social Responsibility:

Poundland's CSR strategy is focus on the following 3 key areas:

- Environment
 - Packaging – working towards reducing packaging, recyclable where possible, encouraging supplier to use best practice.
 - Electricity and Gas – focused on lowering emissions across the business
 - Waste Initiatives – including battery collection in all stores
 - Recycling and Waste – ongoing reduction in waste through recycling
- Social Responsibility
 - Sourcing – strengthened the supplier code of conduct, 70% of products sourced through UK companies
 - Charity – support Macmillan Cancer Care
- Employee Responsibility
 - Our People – offer incentives, child care vouchers and healthcare
 - Local Community Support – work with local job centre and the DWP in helping the unemployed to improve employability

Regional Sourcing Policy:

Currently, the only Welsh brand offered within their Welsh stores is Trederwen Essence, however the retailer has showed a recent interest in meeting with Welsh suppliers in order to source further products to be sold in their 28 Welsh stores. This follows a similar successful initiative in Ireland which took place in their Dealz fascia.

Appendices

Tesco Stores in Wales:

Express	Cardiff St Marys Exp	26/27 St Marys Street, Cardiff	CF10 1AB
Express	Cardiff Tredegar St Exp	78-79, Tredegar Street, St Davids Shopping Centre, Cardiff	CF10 1EF
Express	Cardiff St Davids House Exp	St Davids House 14-16, Cardiff	CF10 1QD
Express	Mermaid Quay Cardiff Exp	Unit 17 Mermaid Quay, Cardiff Bay, Cardiff	CF10 5BZ
Express	Corporation Rd Cardiff Exp	2A Corporation Road, Grangetown, Cardiff	CF11 7AT
Express	Cardiff North Rd Exp	Units 2-3 Parkfield, 149 North Road, Cardiff	CF14 3AL
Express	Maes Y Coed Cardiff Exp	Unit 2, Maes Y Coed, Cardiff	CF14 4TT
Express	Tyn Y Parc Cardiff Exp	Ty'N-Y-Parc Road, Cardiff	CF14 6BN
Express	Whitchurch Exp	2-4 Park Road, Whitchurch, Cardiff	CF14 7BQ
Express	Cardiff Cregiau Exp	1 Cardiff Road, Cregiau, Cardiff	CF15 9NL
Express	Cardiff Clifton Exp	31 & 32 Clifton Street, Splott, Cardiff	CF24 1LR
Express	Cardiff City Rd Exp	134-142 City Road, Cardiff	CF24 3DR
Express	Cardiff Wellfield Exp	29-33 Wellfield Road, Cardiff	CF24 3PJ
Express	Salisbury Rd Cardiff Exp	Salisbury Road, Cardiff	CF24 4AD
Express	Cathays Terrace Exp	Cathays Terrace, Cathays, Cardiff	CF24 4HZ
Express	Cardiff Countisbury Exp	Countisbury Avenue, Llanrumney, Cardiff	CF3 5SQ
Express	Gentle Way Bridgend Exp	Unit 4 Gentle Way, Broadlands, Bridgend	CF31 5EJ
Express	Pencoed Exp	Coychurch Road, Pencoed	CF35 5NG
Express	Treforest Express	Unit 3 The Broadway Rd, Treforest, Pontypridd	CF37 1BT
Express	Pontypridd Taff St Exp	Taff Street, Pontypridd	CF37 4UY
Express	Church Village Exp	15 Main Rd, Tonteg, Church Village, Rhondda Cynon Taff	CF38 1PW
Express	Llantwit Fardre Exp	Llantrisant Road, Llantwit Fardre	CF38 2LT
Express	Whitchurch Cardiff Exp	2-4 Park Road, Whitchurch, Cardiff	CF14 7BQ
Express	Canton Express	425-427 Cowbridge Rd, Cardiff	CF5 1JG
Express	Ely Cardiff Exp	225-229 Cowbridge Road, Cardiff	CF5 5TD
Express	Rhose Exp	Fontygary Road, Rhose, Vale Of Glamorgan	CF62 3DT
Express	Barry Road Exp	Barry Road Main Street, Barry	CF63 1BA
Express	Barry Holton Rd Exp	57 Holton Road, Barry	CF63 4SU
Express	Penarth Exp	Herbert Terrace, Penarth	CF64 2AF
Express	Dinas Powys Castle Exp	Castle Drive, Dinas Powys	CF64 4NR
Express	Cowbridge Express	44 High Street, Vale Of Glamorgan, Cowbridge	CF71 7AG
Express	Pontyclun Exp	Unit 1 Cowbridge Road, Pontyclun	CF72 9EE
Express	Caerphilly Express	1 & 2 Castleview, Nantgarw Road, Caerphilly	CF83 2NG
Express	Caerphilly Brynhyfryd Rd Exp	Brynhyfryd Road, Caerphilly	CF83 2RD
Express	Riverbank Court Exp	Unit Number, Riverbank Court, Newport Rd, Trethomas	CF83 8BY
Express	Flint Express	22/28 Chester Street, Flint	CH6 5HR
Express	Bethesda High St Exp	High Street, Bethesda	LL57 3NS
Express	Benllech Anglesey Exp	Amlwch Rd, Benllech	LL748SR
Express	Rogerstone Newport Exp	108 Cefn Road, Rogerstone	NP10 9EX
Express	Blackwood Newport Exp	Unit C, Highfields Way, Blackwood	NP12 1SL
Express	Chepstow Old Farm Exp	2 Old Farm Shopping Centre, Denbigh Drive, Bulwark Chepstow	NP16 5TY

Express	Caerleon Rd Newport Exp	20-22 Caerleon Road, Newport	NP19 7BX
Express	Newport Chepstow Rd Exp	Chepstow Road, Newport	NP19 9EZ
Express	Newport Cambrian Exp	14, Cambrian Road, Newport	NP20 4AB
Express	Clytha Pk Newport Exp	Clytha Park Road, Newport	NP20 4NZ
Express	Malpas Rd Newport Exp	391 Malpas Road, Newport	NP20 6WB
Express	Cwmbran Exp	Golden Harvest Ph, Ty Gwyn Rd, Cwmbran	NP44 4LF
Express	Swansea St Helens Rd Exp	24/27 St Helens Road, Swansea	SA1 1ZH
Express	De La Beche Swansea Exp	De La Beche Street, Swansea	SA1 3EZ
Express	Swansea Langdon Rd Exp	Langdon Road, Swansea	SA1 8QY
Express	Wauanceirch Exp	Dwr-Y-Felin Road, Wauanceirch	SA10 7SS
Express	Briton Ferry Exp	Neath Road, Briton Ferry, Port Talbot	SA11 2AX
Express	Glyn Neath Exp	Neath Road, Glyn Neath	SA11 5EW
Express	Swansea Upland Crescent Exp	Upland Crescent, Swansea	SA2 0EY
Express	Sketty Gower Rd Exp	37 Gower Road, Sketty, Swansea	SA2 9BX
Express	Gowerton Express	62 Bryn-Y-Mor Road, Gowerton, Swansea	SA4 3EZ
Express	Goodwick Express	Harbour Garage, The Parrog Goodwick, Fishguard	SA64 0DE
Express	Saundersfoot Exp	Brewery Terrace, Saundersfoot	SA69 9HG
Express	Tenby Exp	46 High Street, Tenby	SA70 7AB
Metro	Cardiff Capitol Metro	Units 7/9 Capitol Shopping Centre, Cardiff	CF10 2HQ
Metro	Cardiff Canton Metro	255 Cowbridge Rd East, Cardiff	CF11 9AN
Metro	Cardiff Roath Metro	11-17 Albany Road, Cardiff	CF24 3LH
Metro	Caerphilly	20 Cardiff Road, Caerphilly	CF83 1JN
Metro	Abertillery	Castle Street, Abertillery	NP13 1UR
Metro	Abergavenny Metro	26 Frogmore Street, Abergavenny	NP7 5AH
Metro	Neath	Water Street, Neath	SA11 3ET
Superstores	St Mellons	Crickhowell Road, St Mellons, Cardiff	CF3 0EF
Superstores	Bridgend 1	Brewery Lane, Bridgend	CF31 4AP
Superstores	Maesteg	Castle Street, Maesteg	CF34 9EB
Superstores	Aberdare	Depot Road, Aberdare	CF44 8DL
Superstores	Barry	Stirling Road Shopping Precinct, Barry	CF62 8NX
Superstores	Penarth	Western Road, Penarth	CF64 1SA
Superstores	Ystrad Mynach	New Road, Ystrad Mynach, Hengoed	CF82 7DP
Superstores	Caerphilly Crossways	Parc Ponypandy, Crossways Retail Park, Caerphilly	CF83 3NL
Superstores	Mold	Ponterwyl, Mold	CH7 1UB
Superstores	Holywell	Strand Walk, Bank Place, Holywell	CH8 7AN
Superstores	Llandrindod Wells	Waterloo Road, Llandrindod Wells, Powys	LD1 6BG
Superstores	Cefn Mawr	Plas Kynaston Lane, Off Wells Street, Wrexham	LL14 3AT
Superstores	Ruthin	Lon Parcwr, Ruthin	LL15 1BB
Superstores	Prestatyn	Prestatyn Shopping Parade, Nant Hall Road, Prestatyn	LL19 9BJ
Superstores	Abergele	Market Street, Abergele	LL22 7AA
Superstores	Llandudno Junction	6G Road, Llandudno Junction, Llandudno	LL31 9XY
Superstores	Porthmadog	High Street, Porthmadog	LL49 9NU
Superstores	Caernarfon South Road	South Road, Caernarfon	LL55 2YG
Superstores	Abertillery	Castle St, Abertillery, Blaenau Gwent	NP13 1UR

Superstores	Chepstow	Station Road, Chepstow	NP16 5PB
Superstores	Ebbw Vale	North West Approach, Ebbw Vale	NP23 6TS
Superstores	Pontypool	Top Carpark, Lower Bridge Street, Pontypool	NP4 6JU
Superstores	Swansea Marina	Albert Row, Oystermouth Road, Swansea	SA1 3RA
Superstores	Neath Abbey	Neath Abbey Road, Neath	SA10 7FE
Superstores	Port Talbot East Bank	Heilborn Way/Prior St, Port Talbot	SA13 1YA
Superstores	Ammanford	Park Street, Ammanford	SA18 2LR
Superstores	Pontarddulais	Tidal Reach, Pontarddulais, Swansea	SA4 8TB
Superstores	Cardigan	Aberystwyth Road, Cardigan	SA43 1NA
Superstores	Pembroke Dock	London Road, Bierspool, Pembroke Dock, Dyfed	SA72 6DS
Superstores	Milford Haven	Havens Head Park, The Docks, Milford Haven	SA73 3AU
Superstores	Pontardawe	Gwyn's Drift, Pontardawe, Neath	SA8 3AZ
Superstores	Ystradgynlais Wind Ro	Wind Road, Ystradgynlais	SA9 1AD
Superstores	Newtown	Pool Road, Newtown	SY16 1DW
Superstores	Welshpool	Smithfield Road, Welshpool	SY21 7BL
Extra	Cardiff Extra	Excelsior Estate, Excelsior Road, Cardiff	CF14 3AT
Extra	Cardiff Pengam Extra	Rover Way, Pengam Green, Cardiff	CF24 2HP
Extra	Bridgend Extra	Cowbridge Road, Bridgend	CF31 3SQ
Extra	Pontypridd Extra	Gelli-Hirion Ind Estate, Pontypridd	CF37 5SN
Extra	Merthyr Tydfil Station Yard Ext	Beacons Place, Station Yard, Tramroad Side	CF47 0AP
Extra	Culverhouse Cross Ext	Culverhouse Cross, Cardiff	CF5 6XQ
Extra	Talbot Green Extra	Green Park Talbot Green, Pontyclun	CF72 8RB
Extra	Broughton Chester Extra	Broughton Retail Park, Chester Rd, Broughton, Flintshire	CH4 0DR
Extra	Wrexham Extra	Crescent Road, Wrexham	LL13 8HF
Extra	Bangor Extra	Caernarfon Road, Bangor	LL57 4SU
Extra	Holyhead Extra	Penrhos Indust Estate, Penrhos, Holyhead	LL65 2UH
Extra	Risca Extra	Commercial Steet, Newport	NP11 6NP
Extra	Newport Spytty Extra	Spytty Road, Newport	NP19 4TX
Extra	Newport Gwent Extra	Harlech Retail Park, Cardiff Road, Newport	NP20 3BA
Extra	Llanelli Extra	Parc Trostre, Llanelli, Dyfed	SA14 9UY
Extra	Carmarthen Extra	Morfa Lane, Carmarthen	SA31 3AX
Extra	Swansea Cadle Extra	Pontardulias Road, Cadle, Swansea	SA5 4BA
Extra	Haverfordwest Extra	Fenton Trading Estate, Portfield, Haverfordwest	SA61 1BU
Extra	Swansea Llansamlet Ext	Nantyffin Road, Llansamlet, Swansea	SA7 9RD

Sainsbury's Stores in Wales:

Local	St Mary Street	114 St. Mary St, Cardiff, South Glamorgan	CF10 1DY
Local	Bute Street	Bute Street, Bay, Cardiff	CF10 5AB
Local	Whitchurch Rd	116-120 Whitchurch Rd, Cardiff	CF14 3LZ
Local	Cardiff Rhiwbina	Heol Llanishen Fach, Rhiwbina, Cardiff	CF14 6RG
Local	Albany Road	97-99 Albany Road, Cardiff	CF24 3RS
Local	Woodville Road	123-127 Woodville Road, Cardiff	CF24 4DZ
Local	Rumney Newport Road	751 Newport Road, Cardiff	CF3 4AJ
Local	Barry	39-40 Park Crescent, Barry, South Glamorgan	CF62 6HE
Local	Penarth	28-30, Windsor Rd, Penarth, South Glamorgan	CF64 1JH
Local	Mold Mynydd Isa	1 Mercia Drive, Mynydd Isa, Flintshire	CH7 6UY
Local	Llanduddno	113-117 Mostyn Street, Llandudno, Gwynedd	LL30 2LW
Local	Caerleon Mill St	Caerleon, Goldcroft Common, Newport	NP18 1BE
Local	Newport John Frost Square	Unit 35, Sovereign Arcade, Newpoort	NP20 1ED
Local	Swansea Uplands Crescent	41 Uplands Crescent, Swansea	SA2 0NP
Local	Gower Road	102 Gower Road, Uplands, Swansea	SA2 9BZ
Superstore	Cardiff	133-139 Queen St, Cardiff	CF10 2BJ
Superstore	Thornhill	Excalibur Drive, Thornhill, Cardiff	CF14 9BB
Superstore	Colchester Avenue	Colchester Avenue, Roath, Cardiff, South Glamorgan	CF23 9XN
Superstore	Bridgend	The Derwen, Bridgend, Mid Glamorgan	CF32 9ST
Superstore	Lampeter	Market St, Lampeter, Ceredigion	SA48 7DS
Superstore	Pontypridd	Ynysangharad Road, Pontypridd, Mid Glamorgan	CF37 4DA
Superstore	Flint	Holywell Road, Flint, Flintshire	CH6 5GB
Superstore	Wrexham	Plas Coch Rd, Wrexham	LL11 2BW
Superstore	Rhyl	Rhyl Rd, Rhyl, Flintshire	LL18 2TP
Superstore	Pontllanfraith	Newbridge Rd Ind Est, Pontllanfraith, Blackwood	NP12 2AN
Superstore	Newport	Albany Street, Newport	NP20 5NJ
Superstore	Cwmbran	Llewellyn Rd, Cwmbran, Gwent	NP44 1UL
Superstore	Swansea	Quay Parade, Swansea, West Glamorgan	SA1 8JA
Superstore	Gorseinon	14 Alexandra Rd, Gorseinon, Swansea	SA4 4NW
Superstore	Welshpool	Brook Street, Welshpool, Powys	SY21 7NJ

Asda Stores in Wales:

Supermarkets	Pyle	Pyle Industrial Estate, Pyle, Bridgend	CF33 6BU
Supermarkets	Maesteg	Castle Street, Maesteg	CF34 9UN
Supermarkets	Saltney	River Lane, Saltney	CH4 8RH
Supermarkets	Flint	Holywell Road, Flintshire Retail Park, Flint	CH6 5BG
Supermarkets	Llandudno Junction	Conway Road, Llandudno	LL31 9LU
Supermarkets	Pwllheli	Sand Street, Pwllheli	LL53 5RT
Supermarkets	Caernarfon	Bangor Road, Caernarfon	LL55 1AT
Supermarkets	Bangor Farrar Road	Farrar Road, Bangor	LL57 1LJ
Supermarkets	Holyhead	Kingsland Road, Holyhead	LL65 2RN
Supermarkets	Llangefni	Ffordd Cae Sel, Llangefni	LL77 7DW
Supermarkets	Caldicot	Woodstock Way, Caldicot	NP26 5DB
Supermarkets	Pembroke Dock	Gordon Street, Pembroke Dock	SA72 6DA
Supermarkets	Ystalyfera	Glanyrafon, Godrergraig	SA9 2DE
Superstore	Leckwith Road	Capital Retail Park, Leckwith Road, Cardiff	CF11 8OZ
Superstore	Cardiff Bay	Ferry Road Retail Park, Cardiff	CF11 OJR
Superstore	Pentwyn	8 Dering Road, Pontprennau	CF23 8NL
Superstore	Bridgend	Coychurch Road, Bridgend	CF31 3AG
Superstore	Tonypandy	Colliers Way, Tonypandy	CF40 2YQ
Superstore	Aberdare	Riverside Retail Park, Aberdare	CF44 0AH
Superstore	Merthyr Tydfil	Dowlais Top, Merthyr Tydfil	CF48 2YF
Superstore	Barry	Ffordd Y Mileniwm, Barry	CF62 5AT
Superstore	Caerphilly	Pontywindy Road, Caerphilly	CF83 3SX
Superstore	Wrexham	Island Green Shopping Park, Hill Street, Wrexham	LL13 8HL
Superstore	Rhyl	St Asaph Avenue North, Kimnel Bay, Rhyl	LL18 5EQ
Superstore	Llandudno	Conway Road, Llandudno	LL30 1PJ
Superstore	Newport	Pencarn Way, Coedkernew, Newport	NP10 8XL
Superstore	Blackwood	High Street, Blackwood, Gwent	NP12 ONT
Superstore	Newport Pillgwenlly	Lower Dock Street, Newport	NP20 2BH
Superstore	Brynmawr	Lakeside Retail Park, Nantyglo, Ebbw Vale	NP23 4SL
Superstore	Cwmbran	Llewelyn, Cwmbran	NP44 1UL
Superstore	Gorseinon	Heol y Mynydd, Gorseinon, Swansea	SA4 4BZ
Superstore	Swansea	Upper Forest Way, Swansea	SA6 8PS
Supercentre	Cardiff Coryton	Longwood Drive, Cardiff	CF14 7EW
Supercentre	Queensferry	Aston Road, Queensferry	CH5 1UZ
Supercentre	Llanelli	Murray Street, Llanelli	SA15 1BX

Morrisons Stores in Wales:

Local	Cardiff Pentwyn	Morrisons M local, 113 Brynheulog, Pentwyn, Cardiff	CF23 7JD
Local	Cardiff Cowbridge Road East	Morrisons M local, 516 Cowbridge Road East, Cardiff	CF5 1BL
Local	Rhyl, Coast Road	Morrisons M local, Coast Road, Rhyl	LL18 3PP
Supermarket	Cardiff International Sports Village	International Sports Village, Cardiff Bay, Cardiff	CF11 0JP
Supermarket	Cardiff Tyglas	Ty Glas Road, Cardiff	CF14 5EB
Supermarket	Cardiff Newport Road	507 Newport Road, Penylan, Cardiff	CF23 9YG
Supermarket	Porth	Pontypridd Road, South Wales, Porth	CF39 9BA
Supermarket	Barry	Penny Way, Barry	CF63 4BA
Supermarket	Bargoed	Bargoed Gateway, Bargoed	CF81 8QT
Supermarket	Caerphilly	Castle Court, Caerphilly	CF83 1NU
Supermarket	Saltney	High Street, Saltney, Saltney, Chester	CH4 8RU
Supermarket	Connahs Quay	Ffordd Llanarth, Connah's Quay, Connahs Quay, Deeside	CH5 4WL
Supermarket	Brecon	Free Street, Brecon	LD3 7SE
Supermarket	Wrexham	Ruthin Road, Wrexham	LL13 7TU
Supermarket	Denbigh	Smithfield Road, Denbigh	LL16 3RQ
Supermarket	Rhyl	Marsh Road, Rhyl	LL18 2DF
Supermarket	Colwyn Bay	Sea View Road, Seaview Road, Colwyn Bay	LL29 8DG
Supermarket	Caernarfon	North Road, Caernarfon	LL55 1BE
Supermarket	Bangor	Holyhead Road, Bangor	LL57 2EE
Supermarket	Holyhead	Penrhos, Holyhead	LL65 2UQ
Supermarket	Rogerstone	Azalea Road, Rogerstone, Rogerstone, Newport	NP10 9SA
Supermarket	Newport	Orb Drive, Newport	NP19 0RA
Supermarket	Ebbw Vale	Beaufort Road, Ebbw Vale	NP23 5WS
Supermarket	Cwmbran	Grange Road, Cwmbran	NP44 3XU
Supermarket	Swansea	Pentre-Chwyth, Swansea	SA1 7DF
Supermarket	Neath	Angel Street, Neath	SA11 1RS
Supermarket	Baglan	Christchurch Road, Baglan Industrial Park, Baglan, Port Talbot	SA12 7BZ
Supermarket	Llanelli	Pemberton Retail Park, Trostre Roundabout, Llanelli	SA14 9DR
Supermarket	Carmarthen	Parc Pensarn, Carmarthen	SA31 2NF
Supermarket	Haverfordwest	Bridge Meadow Lane, Haverfordwest	SA61 2EX
Supermarket	Newtown	Pool Road, Newtown	SY16 3AH
Supermarket	Welshpool	Berriew Street, Welshpool	SY21 7SQ
Supermarket	Aberystwyth	Parcydolau, Llanbadarn Fawr, Aberystwyth	SY23 3RN

The Co-operative Stores in Wales:

Cardiff, Pierhead Street	Pierhead Street, Cardiff	CF10 4QP
Cardiff, Kings Road	Kings Road, Pontcanna, Cardiff	CF11 9DF
Cardiff, Whitchurch	34 - 40 Merthyr Road, Whitchurch	CF14 1DH
Cardiff, Llandaff	143 Station Road, Llandaff North	CF14 2FF
Cardiff, Whitchurch Road	25/27 Whitchurch Road, Heath, Cardiff	CF14 3JN
Cardiff, Largs	Unit 2 Promenade, Largs, Cardiff	CF14 4QD
Cardiff, Station Road	46/48 Station Road, Llanishen, Cardiff	CF14 5LU
Cardiff, Rhiwbina	8a-8b Heol Y Deri, Rhiwbina, Cardiff	CF14 6HF
Cardiff, Taffs Well	30 Cardiff Road, Taffs Well, Cardiff	CF15 7RF
Cardiff, Caerphilly Rd	122 Caerphilly Rd, Cardiff	CF23 6RZ
Cardiff, Pentwyn	9 Glyncoed Road, Pentwyn, Cardiff	CF23 7DX
Cardiff, Splott Road	40-42 Splott Road, Splott, Cardiff	CF24 2DA
Cardiff, Crwys Road	Crwys Road, Roath, Cardiff	CF24 4NE
Cardiff, Countisbury Avenue	40/46 Countisbury Avenue, Llanrumney, Cardiff	CF3 5SL
Bridgend, The Triangle	The Triangle, 10 Canolfan, Brackla, Bridgend	CF31 2LL
Bridgend, Victoria Street	Victoria Street, Pontycymmer, Bridgend	CF32 8NW
Pyle, Main Road	Main Road, Pyle	CF33 6HR
Pencoed	Penybont Road, Pencoed, Bridgend	CF35 5NP
Porthcawl	Lias Road, Porthcawl	CF36 3AH
Ynysybwl	45 Robert Street, Ynysybwl, Near Pontypridd	CF37 3DY
Pontypridd, The Precinct	The Precinct, Church Village, Pontypridd	CF38 1SB
Pontypridd, Commercial Street	Commercial Street, Tynant, Beddau, Pontypridd	CF38 2DB
Tonyrefail	Penrhiwfer Road, Tonyrefail	CF39 8EY
Rhondda	Cambrain Avenue, Garden Village, Rhondda	CF39 8TB
Penygraig	75 Tylacelyn Road, Penygraig	CF40 1LA
Treorchy	Station Road, Treorchy	CF42 6UA
Ferndale	60 High Street, Ferndale	CF43 4RR
Aberdare	62A Tramway Road, Hirwaun, Aberdare	CF44 9PA
Mountain Ash	12/14 Penrhiwceiber Road, Penrhiwceiber, Mountain Ash	CF45 3SP
Treharris	35 Fox Street, Treharris	CF46 5HE
Caerphilly, Commercial Street	Commercial Street, Nelson, Caerphilly	CF46 6NF
Nelson	Mabon Road, Caerphilly, Nelson	CF46 6PE
Merthyr Tydfil	Brown Street, Pentrebach, Merthyr Tydfil	CF48 4BG
Cardiff, Cowbridge Road	327 Cowbridge Road, East Canton	CF5 1JD
Cardiff, Llantrisant Road	Llantrisant Road, Radyr Court	CF5 2PW
Cardiff, Radyr Court	Radyr Court Shopping Centre, Danes Court Way, Llandaff	CF5 2QF
Cardiff, Fairwater Green	10-12 Fairwater Green, Cardiff	CF5 3BA
Llantwit Major	Boverton Road, Llantwit Major	CF61 1XA
Cwm Talwg	Port Road, Cwm Talwg	CF62 7LT
Barry	1 Colcot Road, Barry	CF62 8HJ
Penarth, Windsor Road	26 Windsor Road, Penarth	CF64 1JH
Cowbridge	57 High St, Cowbridge	CF71 7AF

Llantrisant	6 Southgate Avenue, Llantrisant	CF72 8DQ
Pontyclun	3-7 Cowbridge Road, Pontyclun	CF72 9BS
Bedwas	51-53 Church Street, Bedwas	CF83 8ED
Broughton	7 Broughton Hall Road, Broughton, Chester	CH4 0QR
Aston	21-23 Central Drive, Aston, Deeside	CH5 1LR
Queensferry	Chester Road, Queensferry, Deeside	CH5 2DT
Ewloe	Chester Road, Ewloe	CH5 3DN
St Davids Park, Ewloe	St. Davids Park, Ewloe, Deeside	CH5 3XN
Mold, Ambrose Lloyd Centre	Ambrose Lloyd Centre, Mold	CH7 1NH
Buckley	Brunswick Road, Buckley	CH7 2EG
Mold, Queen Street	Queen Street, Leeswood, Mold	CH7 4RQ
Llandrindod Wells	Middleton Street, Llandrindod Wells	LD1 5YG
Builth Wells, Brecon Rd	Brecon Rd, Builth Wells	LD2 3ED
Builth Wells, Station Rd	Llanelwed, Station Road, Builth Wells	LD2 3SS
Talgarth	The Square, Talgarth	LD3 0BW
Brecon	Lion Street, Brecon	LD3 7HY
Wrexham, Lord Street	5 Lord Street, Wrexham	LL11 1LG
Wrexham, High Street	High Street, Coedpoeth, Wrexham	LL11 3UF
Llay, Shones Lane	Shones Lane, Llay, Wrexham	LL12 0PL
Llay, Market Square	Market Square, Fifth Ave, Llay, Wrexham	LL12 0SA
Wrexham, Boras Park	Borras Park Road, Borras Park, Wrexham	LL12 7TH
Wrexham, Garden Village	175 Chester Road, Garden Village, Wrexham	LL12 8DW
Wrexham, Cross Lanes	Cross Lanes, Wrexham, North Wales	LL13 0TR
Wrexham, Poplar Road	21 Poplar Road, Wrexham	LL13 7DG
Wrexham, Queens Park	1-3 Prince Charles Road, Queens Park, Wrexham	LL13 8YB
Rhos	Market Street, Rhos, North Wales	LL14 1AF
Rhostyllen	50 Wrexham Road, Rhostyllen, Wrexham	LL14 4DH
Chirk	Holyhead Road, Chirk, Wrexham	LL14 5NA
Johnstown	Ruabon Road, Johnstown, Wrexham	LL14 6PU
Ruthin, Station Road	Station Road, Ruthin	LL15 1BP
Ruthin, Denbigh Road	Porth Y Dre Stores, Denbigh Road, Ruthin	LL15 1PB
Denbigh	High Street, Denbigh	LL16 3RY
St Asaph	Lower Denbigh Road, St. Asaph	LL17 0ED
Rhyl, High Street	97 High Street, Rhyl	LL18 1TR
Rhuddlan	Rhyl Road, Rhuddlan, Clywd	LL18 2TS
Rhyl, Ffordd Elan	45 Ffordd Elan, Rhyl	LL18 4HZ
Prestatyn	20 Meldien Road, Prestatyn	LL19 9RT
Llangollen	Regent Street, Llangollen	LL20 8HN
Bala	78-86 Stryd Fawr, Bala	LL23 7AD
Llanrwst	Plough Street, Conwy, Llanrwst	LL26 0AG
Rhos on Sea	10 Penrhyn Avenue, Rhos On Sea, Colwyn Bay	LL28 4RD
Conwy	Cefn Road, Old Colwyn, Conwy	LL29 9PN
Old Colwyn	Colwyn Service Station, Abergale Road, Old Colwyn, Colwyn Bay	LL29 9YG
Llandudno, Dunphrys Corner	Dunphrys Corner, 31-33 Mostyn Avenue, Craig Y Don, Llandudno	LL30 1YS
Llandudno, Penrhyn Bay	Glan-Y-Mor Road, Penrhyn Bay, Llandudno	LL30 3NL

Llandudno Junction	157 Conway Road, Llandudno Junction, Gwynedd	LL31 9EG
Deganwy	Junction of Pentwyn and Park Rd, Deganwy	LL31 9TH
Llanfairfechen	Village Road, Llanfairfechen, Gwynedd	LL33 0NH
Tywyn	Old Station Yard, Tywyn, Gwynedd	LL36 9AH
Dolgellau	Arran Road, Dolgellau, Gwynedd	LL40 1HR
Blaenau Ffestiniog	High Street, Blaenau Ffestiniog, Gwynedd	LL41 3AG
Barmouth	Station Road, Barmouth, Gwynedd	LL42 1PH
Pwllheli	Lower Cardiff Rd, Pwllheli	LL53 5NF
Pen Y Groes	Water Street, Pen Y Groes, Gwynedd	LL54 6LR
Llanfair	Llanfair P G, Holyhead Road, Anglesey	LL61 5YX
Holyhead	45/49 Market Street, Holyhead, Gwynedd	LL65 1UL
Amlwch	Lon Goch, Gwynedd, Amlwch	LL68 9AL
Benllech	Amlwch Road, Benllech	LL74 8TF
Rogerstone, Highcross Road	Highcross Road, Rogerstone	NP10 9AE
Rogerstone, St John's Crescent	33 - 35, St. John's Crescent, Rogerstone, Newport	NP10 9EY
Newbridge	Station Buildings, Newbridge	NP11 4EZ
Blackwood	1-3 Central Buildings, Central Avenue, Oakdale, Blackwood	NP12 0JU
Blaina	53 High Street, Blaina	NP13 3XB
Usk	51 Bridge St, Usk	NP15 1BQ
Chepstow	Thomas Street, Chepstow	NP16 5DH
Newport	Cromwell Road, Newport	NP19 0HT
Monmouth	10 Oldway Centre, Monnow Street, Monmouth	NP25 3PS
Magor	The Cross, Newport Rd, Magor	NP26 3EG
Caldicot	West End Shopping Centre, Newport Road, Caldicot	NP26 4AA
Pontypool	5 Windsor Road, Griffithstown, Pontypool	NP4 5HY
Pontypool	Stanley Road, Garndiffaith, Pontypool	NP4 7LH
Blaenavon	Ivor Street, Blaenavon	NP4 9NA
Cwmbran, North Road	26-28 North Road, Cwmbran	NP44 2EN
Cwmbran, Llantarnam Road	Llantarnam Road, Cwmbran	NP44 3BB
Swansea Marina	Meridian Quay, Trawler Rd, Swansea Marina	SA1 1LB
Swansea, Plymouth Street	Plymouth Street, Swansea	SA1 3QF
Glynneath	High Street, Glynneath, Port Talbot	SA11 5AL
Cwmavon	Heol Jiwbill, Cwmavon, Neath, Port Talbot	SA12 9NR
Margam	278 Tollgate Road, Margam, Neath, Port Talbot	SA13 2DD
Cross Hands	Llandeilo Road, Cross Hands, Llanelli	SA14 6RD
Felinfoel	Glanlliedi, Felinfoel, Llanelli	SA14 8BB
Llangennech	Afton Road, Llangennech	SA14 8TS
Burry Port	68 Station Road, Burry Port	SA16 0LW
Kidwelly	Monksford Street, Kidwelly	SA17 4TW
Ammanford	College Street, Ammanford	SA18 3AB
Llandybie	The Former Red Cow Inn, High St, Llandybie	SA18 3JA
Llandeilo	Rhosmaen Street, Llandeilo	SA19 6LU
Killay, Gower Road	434 Gower Road, Killay, Swansea	SA2 7AJ
Killay, The Precinct	Unit 6 The Precinct, Killay, Swansea	SA2 7BA
Llandovery	High Street, Llandovery	SA20 0RA

Swansea, Bishopston Rd	Bishopston Rd, Swansea	SA3 3EN
Swansea, Mumbles	512 Mumbles Road, Mumbles, Swansea	SA3 4BU
Mumbles Road	Mumbles Road, Mumbles, Swansea	SA3 4DN
Carmarthen	46 King Street, Carmarthen	SA31 1BH
St Clears	Old Station Yard, Station Road, St Clears	SA33 4DG
Whitland	North Road, Whitland	SA34 0AE
Newcastle Emlyn	4C Sycamore Street, Newcastle Emlyn	SA38 9AP
Cardigan	Lower Mwldan, Cardigan	SA43 1HR
Lampeter	Lower Bridge Street, Lampeter	SA48 7AF
Brynhyfryd	460 Llangyfelach Road, Brynhyfryd, Swansea	SA5 9LR
Clydach	High Street, Clydach, Swansea	SA6 5LJ
Fishguard	32 High Street, Fishguard	SA65 9AR
Kilgetty	Carmarthen Road, Kilgetty	SA68 0YA
Pembroke, Main Street	6/10 Main Street, Pembroke	SA71 4NP
Neyland	44 High Street, Neyland	SA73 1TF
Pontardawe	72 Herbert Street, Pontardawe, Swansea	SA8 4EB
Llanidloes	Llangurig Road, Llanidloes	SY18 6ES
Machynlleth	80-88 Maengwyn Street, Machynlleth	SY20 8EE
Park Avenue	Park Avenue	SY23 1PB
Aberystwyth	Penparcau Road, Penparcau, Aberystwyth	SY23 1RU

Waitrose Stores in Wales:

Queens Street, Cardiff	Unit 4 Queens West, 15 Queen Street, Cardiff, Cardiff	CF10 2AQ
Pontprennau	Croescadarn Close, Pontprennau, Pontprennau	CF23 8AN
Cardiff M4	M4 Motorway,Junction 30, Cardiff, Cardiff	CF23 8RA
Barry	Palmerston Road, Barry, Barry	CF63 2PE
Cowbridge	Birds Lane, Cowbridge	CF71 7AG
Menai Bridge	Mona Road, Menai Bridge, Anglesey	LL59 5EA
Monmouth	110-114 Monnow Street, Monmouth, Monmouthshire	NP25 3EQ
Caldicot	43 Newport Rd, Caldicot	NP26 4UX
Abergavenny	Merthyr Road, Abergavenny, Abergavenny	NP7 9LL

M&S Stores in Wales:

Department Store	Swansea	270 Oxford Street, Swansea	SA1 3BB
Department Store	Cardiff	72 Queen Street, Cardiff	CF10 4XG
Department Store	Cardiff - Culverhouse Cross	Cophthorne Way, Culverhouse Cross, Cardiff	CF5 6YZ
Department Store	Wrexham	33 Eagles Meadow, Wrexham	LL13 8DG
Department Store	Prestatyn	Unit 1 Prestatyn Retail Park, Nants Hall Road, Prestatyn	LL19 9BJ
Department Store	Llandudno	61 Mostyn Street, Llandudno	LL30 2NW
Department Store	Cwmbran	24 South Walk, Cwmbran	NP44 1YD
Department Store	Neath	Green Street, Neath	SA11 1DH
Department Store	Carmarthen	14 Red Street Carmarthen Dyfed	SA31 1RS
Department Store	Haverfordwest	Unit 1 Withybush Retail Park Fishguard Road HAVERFORDWEST	SA61 2PY
Outlet	Bridgend Outlet	Units 50-52 MGD Outlet Centre The Derwen Bridgend	CF32 9SU
Outlet	Pontypridd Food Outlet	100 Taff Street, Pontypridd	CF37 4SL
Outlet	Festival Park Ebbw Vale	Units 19 to 25 Festival Park Outlet Centre EBBW VALE	NP23 8FP
Retail Park	Cardiff Capital RP	Capital Retail Park, Leckwith Road, Cardiff	CF11 8EG
Retail Park	Talbot Green	Unit 7, Talbot Green Retail Park, Talbot Green	CF72 8RB
Retail Park	NEWPORT RP	Units 17-18 Newport Retail Park, Central Av, Newport, Gwent	NP19 4QQ
Retail Park	Llanelli Parc Trostre RP	Unit 2C and 3 Parc Trostre Llanelli	SA14 9UY
Retail Park	Fforestfach Forestfach Retail Park	Pontardulais Road, Swansea	SA5 4BB
Simply Food	Menai Bangor SF	Garth Road, Bangor	LL57 2RG
Simply Food	Cardiff Rail Simply Food	Cardiff Central Station, Cardiff	CF10 1EP
Simply Food	Llanishen Simply Food	Ty Glas Road, Llanishen	CF14 5YP
Simply Food	Cardiff Avenue RP	Unit 4. Avenue Retail Park, Newport Road, Cardiff	CF23 9AF
Simply Food	Pontarddulais Simply Food	Unit 7 Pontardulais Retail Prk, Pontardulais Road, FforestFach	SA5 4BA

Aldi Stores in Wales:

Cardiff, Ferry Road	Ferry Road, Cardiff	CF11 0JR
Cardiff, Dartington Drive	Dartington Drive, Cardiff	CF23 8SQ
Bridgend	Brackla Street, Bridgend	CF31 1BZ
Maesteg	Llynfi Road, Maesteg	CF34 9DS
Pontypridd	Unit 2, Midway Retail Park, Pontypridd	CF37 3EE
Merthyr Tydfil	Plymouth Street, Merthyr Tydfil	CF47 0TP
Cardiff, Treseder Way	Treseder Way, Cardiff	CF5 5NU
Llantrisant	Unit 3 Glamorgan Vale Retail Park, Llantrisant	CF72 8RP
Tir-Y-Berth	New Road, Tir-Y-Berth	CF82 8AU
Flint	Chester Street, Flint	CH6 5DH
Mold	Chester Street, Mold	CH7 1LA
Llandrindod Wells	Station Crescent, Llandrindod Wells	LD1 5BB
Brecon	The Watton, Rich Way, Brecon	LD3 7ED
Wrexham	Plas Coch Ret Park, Wrexham	LL11 2BA
Rhyl	Wellington Road, Rhyl	LL18 1LR
Prestatyn	Meliden Road, Prestatyn	LL19 9RT
Old Colwyn	394 Abergele Road, Old Colwyn	LL29 9LU
Llandudno	Llandudno Retail Prk	LL30 1RY
Porthmadog	Ffordd Penamser, Porthmadog	LL49 9NY
Bangor	Garth Road, Bangor	LL57 2RW
Llangefni	Mill Street, Llangefni	LL77 7JA
Risca	Interchange, Risca	NP11 6 NR
Blackwood	High Street, Blackwood	NP12 1BE
Newport, Barrack Hill	Barrack Hill Unit B, Newport	NP20 5GN
Ebbw Vale	The Walk, Ebbw Vale	NP23 6AY
Cwmbran	Woodside Road, Cwmbran	NP44 3EW
Abergavenny	Monmouth Road, Abergavenny	NP7 5HF
Newport, Spytty Road	Spytty Road, Newport	NP19 4TX
Port Talbot	32/38 Commercial Road, Port Talbot	SA13 1LG
Cross Hands	Llandeilo Road, Cross Hands	SA14 6RD
Llanelli	Swanfield Place, Llanelli	SA15 3PW
Carmarthen	16 Stephens Way, Carmarthen	SA31 2BG
Gorseinon	Millers Drive, Gorseinon	SA4 4QN
Cardigan	Aberystwyth Road, Cardigan	SA43 1NA
Swansea	Unit 1 Carmarthen Road, Swansea	SA5 8LL
Haverfordwest	Salutation Square, Haverfordwest	SA61 2LG

Lidl Stores in Wales:

Wrexham	Salop Road 50/52, Wrexham	LL13 7AF
Gwersyllt	Old Mold Road, Gwersyllt	LL11 4AP
Mold	Denbigh Road, Mold	CH7 1BL
Queensferry	Chester Road East, Queensferry	CH5 1JJ
Denbigh	Vale Street 89, Denbigh	LL16 3AU
Holywell	Coleshill Street, Holywell	CH8 7UP
Colwyn Bay	Conway Road, Colwyn Bay	LL29 7LP
Bangor	High Street 20, Bangor	LL57 1DQ
Holyhead	Llanfawr Road, Holyhead	LL65 2PL
Llangefni	Industrial Estate Road, Llangefni	LL77 7JH
Pwllheli	Cardiff Road, Pwllheli	LL53 5NU
Porthmadog	Penamser Road, Porthmadog	LL49 9NY
Newtown	Llanidloes Road, Newtown	SY16 1ET
Aberystwyth	4, Rheidol Ret Pk, Alexandra Road 4, Aberystwyth	SY23 1LL
Carmarthen	Priory Street, Carmarthen	SA31 1LS
Haverfordwest	Perrots Road, Haverfordwest	SA61 2HD
Milford Haven	Great North Road, Milford Haven	SA73 2NA
Pembroke Dock	Pier Road, Pembroke Dock	SA72 6TR
Swansea	Unit 2 Parc Tawe North, Swansea	SA1 2AA
Penlan	Pentregethin Road, Swansea	SA5 8AB
Trallwn	Trallwn Road, Swansea	SA7 9WL
Morriston	Sway Road, Swansea	SA6 6JA
Gorseinon	Gorseinon Road, Gorseinon	SA4 9GE
Port Talbot	Baglan Bay Retail Park, Afan Way, Port Talbot	SA12 7BZ
Briton Ferry	Briton Ferry Road, Neath	SA11 1AS
Neath	Vale of Neath Ret Pk Cadoxton Rd 2, Neath	SA10 7AY
Pontardawe	Ffordd Parc Ynysderw, Pontardawe	SA8 4AG
Llanelli	The Avenue, Llanelli	SA15 2DP
Ammanford	Foundry Road, Ammanford	SA18 2LS
Merthyr Tydfil	Penygarnddu Ind Estate, Dowlais Top, Merthyr Tydfil	CF48 2TA
Tredegar	Gelli Road, Tredegar	NP22 3RF
Aberdare	Gadlys Road, Aberdare	CF44 8AD
Treorchy	High Street, Treorchy	CF42 6EJ
Tylorstown	East Street, Ferndale	CF43 3HJ
Ystrad Mynach	Ystrad Mynach, Hengoed	CF82 8AA
Porth	Cymmer Road, Porth	CF39 9BL
Cwmbran	Woodside Road, Cwmbran	NP44 3EW
Ely	Cowbridge Road West, Cardiff	CF5 5TD
Leckwith Road	Leckwith Road, Leckwith	CF11 8AZ
Llanishen	Maes-y-Coed Road, Cardiff	CF14 4HH
Cardiff	Maindy Road, Cardiff	CF24 4HQ
Splott	East Tyndall Street, Cardiff	CF24 5EH
Roath	Colchester Avenue, Penylan, Cardiff	CF23 9AN
Barry	Cennin Pedr, Pencoedtre Village, Barry	CF63 1BP
Caerphilly	Beddau Way, off Nantgarw Road 5, Caerphilly	CF83 2AX

Risca	Commercial Street, Risca	NP11 6AW
Tondu	Broadview, Off Maesteg Road, Bridgend	CF32 9DF
Bridgend	Unit 1, Bridgend Retail Park, Bridgend	CF31 3LG
Newport	Granville Street, Off Usk Way, Newport	NP20 2AE
Mendalgief	Unit 5, West Retail Park, Docks Way, Newport	NP20 2NZ
Chepstow	Bulwark Road, Chepstow	NP16 5JW
Monmouth	Redbrook Road, Monmouth	NP25 3LY

Iceland Stores in Wales:

Wrexham Food Warehouse	Unit 12 Island Green Shopping Centre, Wrexham	LL13 7LW
Wrexham	11/13 Rhos Ddu Road, Wrexham	LL11 1AT
Gwersyllt	Kwik Save Precinct, Dodds Lane, Gwersyllt	LL11 4NT
Buckley	Unit 22 Central Parade, Brunswick Road, Buckley	CH7 2EF
Mold	28/44 New Street, Mold	CH7 1NZ
Rhyl	The White Rose Centre, Rhyl	LL18 1EW
Prestatyn 2	72/78 High Street, Prestatyn	LL19 9BE
Holywell	20/22 High Street, Holywell	CH8 7LH
Flint	23/25 Church Street, Flint	CH6 5AD
Colwyn Bay	Unit b 1 Bayview Road, Colwyn Bay	LL29 8DG
Llandudno Junction	Conway Road, Llandudno Junction, Gwynedd	LL31 9LU
Llandudno	Mostyn Champney Retail Park, Llandudno, Gwynedd	LL30 1RY
Caernarfon	Poolside, Bridge Street, Caernarfon	LL55 1NN
Bangor	Unit 3 Deiniol Centre, Bangor, Gwynedd	LL57 1NW
Llangefni	Bridge Street, Llangefni, Anglesey	LL77 7PN
Pwllheli	Y Maes, Pwllheli, Gwynedd	LL53 5NF
Holyhead	Cyftir Lane, Erw Crossroads, Holyhead	LL65 2PU
Barmouth	Unit 1 Station Road, Barmouth, Gwynedd	LL42 1LU
Welshpool	Puzzle Square, Welshpool, Powys	SY21 7LE
Newtown	High Street, Bank Lane, Newtown	SY16 2NX
Aberystwyth	Rheidol Retail Park, Station Road Off Alexandra Road, Aberystwyth	SY23 1LL
Ammanford	12/14 Quay Street, Ammanford	SA18 3DB
Llanelli	12/14 Park Street, Llanelli, Dyfed	SA15 3YE
Morrison	34/35 Woodfield Street, Morrison	SA6 8AB
Haverfordwest	6/10 Picton Place, Haverfordwest, Dyfed	SA61 2LX
Cwmdu Swansea	Unit 2 Parc Cwmdu, Carmarthen Road, Swansea	SA5 8LJ
Neath	Old Market Street, Neath, Mid Glamorgan	SA11 3NA
Port Talbot	Store D Aberfan Centre, Port Talbot, W. Glamorgan	SA13 1PB
Swansea Phoenix	Unit 3, Phoenix Retail Park, SA7 9EG	SA7 9EG
Maesteg	Llynfi Road, Maesteg, Mid Glamorgan	CF34 9DS
Swansea	Shop 1a, St. David's Square, Swansea	SA1 3LG
Bridgend	Bracklea Street Shopping Centre, Bridgend, Mid Glamorgan	CF31 1DD
Tonypandy	106/108 Dunraven Street, Tonypandy	CF40 1AR
Treorchy	205 High Street, Rhondda Cynon Taff	CF42 6AS
Albany Road	23/27 Albany Road, Roath Park, Cardiff	CF24 3LH
Cardiff	Merthyr Road, Whitchurch, Cardiff	CF14 1DH
Canton Cardiff	194b Cowbridge Road East, Canton, Cardiff	CF5 1GW
Llanrumney	4/6 Countisbury Avenue, Llanrumney	CF3 5SJ
Caerphilly	6/12 Cardiff Road, Caerphilly, Mid Glamorgan	CF83 1JN
Barry	143 Holton Road, Barry, South Glamorgan	CF63 4HP
Midway Food Warehouse	Unit 4B Midway Retail Park, Pontypridd	CF37 5BL
Newport Spytty	Newport Retail Park, Spytty Rd, Newport	NP19 4QQ
Newport Clarence Place	3/7 Clarence Place, Newport, Gwent	NP19 7AA

Newport Commercial	161/163 Commercial Street, Newport	NP20 1JQ
Cwmbran	18 Monmouth Square, Cwmbran, Gwent	NP44 1XG
Monmouth	24 Agincourt Square, Monmouth	NP25 3DY
Abergavenny	8 Cibi Walk, Frogmore Street, Abergavenny	NP7 5AJ
Pontypool	Crown Buildings, George Street	NP4 6LR
Ebbw Vale	Unit 1The Walk, Ebbw Vale Retail Pk	NP23 6DL
Merthyr Tydfil	15 Graham Way, Merthyr Tydfil, Mid Glamorgan	CF47 8EG
Merthyr Pentrebach	Unit 2B Triangle Business Park, Pentrebach, Merthyr	CF48 4TQ
Aberdare	9/10 Commercial Street, Aberdare, Mid Glamorgan	CF44 7RW

Farmfoods Stores in Wales:

Aberdare	Riverside Retail Park, Aberdare	CF44 0AH
Blackwood	Unit 2A, Cliff Rd, Blackwood Retail Park, Blackwood	NP12 0NT
Bridgend	Unit 19 Brackla Street Centre, Bridgend	CF31 1DD
Brynmawr	Unit 1A, Lakeside Retail Park, Brynmawr	NP23 4SL
Caernarfon	38-40 Pool Street, Caernarfon	LL55 2AB
Carmarthen	Stephens Way, Pensarn, Carmarthen	SA31 2NG
Cardiff Ely	Treseder Way, Ely, Cardiff	CF5 5NU
Cardiff Pentwyn	Unit 1, Pentwyn Road, Pentwyn, Cardiff	CF23 7XH
Cross Hands	Unit 1 Heol Stanllyd, Cross Hands Retail Park, Cross Hands, Carmarthenshire	SA14 6RB
Flint	Unit D2, Flintshire Retail Park, Holywell Road	CH6 5GB
Gorseinon	Unit 3 Gorseinon Road, Gorseinon, Swansea	SA4 4DQ
Holyhead	Unit 3 Penrhos Retail Park, Holyhead	LL65 2UH
Llanelli	Swansea Road, Llanelli	SA15 3EQ
Merthyr Tydfil	Court Street, Merthyr Tydfil, Mid Glamorgan	CF47 8DU
Mold	Lead Mills Road, Mold	CH7 1UD
Pontardawe	Pontardawe Retail Park, Ffordd Parc Ynysderw, Pontardawe	SA8 4EG
Pontypool	Unit 4 Crane Street, Pontypool	NP4 6LR
Porth	Cymmer Road, Porth	CF39 9BL
Saltney	Unit 2 St Davids Retail Park, High St, Saltney	CH4 8SN
Swansea	Unit 6F Lion Way, Swansea Enterprise Park, Swansea	SA7 9EH
Tredegar	13-15 Gwent Shopping Centre, Tredegar	NP22 3EJ
Wrexham	95 Kingsmills Road, Wrexham	LL13 8NN

B&M Stores in Wales:

Bargain Store	Wrexham	LL11 1RY
Bargain Store	Mold	CH7 1AU
Bargain Store	Ruthin	LL15 1BP
Bargain Store	Flint	CH6 5GB
Bargain Store	Rhyl	LL18 3AD
Bargain Store	St Davids - Bangor	LL57 4TJ
Bargain Store	Aberystwyth	SY23 3TL
Bargain Store	Carmarthen	SA31 1PH
Bargain Store	Swansea	SA7 9RG
Bargain Store	Port Talbot	SA13 1PB
Bargain Store	Llanelli	SA14 9UZ
Bargain Store	Porthcawl	CF36 3AR
Bargain Store	Bridgend	CF31 3XX
Bargain Store	Aberdare	CF44 7RW
Bargain Store	Merthyr Tydfil	CF47 8DH
Bargain Store	Ebbw Vale	NP23 6HQ
Bargain Store	Abergavenny	NP7 5RU
Bargain Store	Blackwood	NP12 0NT
Bargain Store	Pontypridd	CF37 4SS
Bargain Store	Newport - Kingsway	NP20 1ED
Bargain Store	Newport	NP20 2NS
Bargain Store	Pentwyn	CF23 7XH
Bargain Store	Cardiff – Rover Way	CF24 1RQ
Bargain Store	Caerphilly	CF83 3AX
Home Store	Queensferry	CH5 1SA
Home Store	Gendros - Swansea	SA5 8JF
Home Store	Merthyr Tydfil - Dowlais Top Retail Park	CF48 2TA
Home Store	Cardiff Bay	CF11 0JR
Home Store with Garden Centre	Cwmbran	NP44 3PH

Home Bargains Stores in Wales:

Ammanford	30 Quay Street, Ammanford	SA18 3BS
Bangor	Caernarfon Road, Bangor	LL57 4SG
Barry	Thompson Street, Barry	CF63 4JN
Blackwood	Blackwood Gate Retail Par, Blackwood	NP12 2FS
Market Street Bridgend	1 Market Street, Bridgend	CF31 1LL
Picton Court Retail Park Bridgend	Picton Court Retail Park, Waterton, Bridgend	CF31 3XX
Ebbw Vale	Lakeside Retail Park, Nantyglo, Ebbw Vale	NP23 4SL
Caernarfon	Bangor Street, Caernarfon	LL55 1AR
Caerphilly	Pontygwindy Road, Caerphilly	CF83 3HF
Cowbridge Road West - Cardiff	Cowbridge Road West, Cardiff	CF5 5TD
Aberdare	Cardiff Road, Aberaman, Aberdare	CF44 6DX
Tomypanyd	Llwynypia Road, Tonympanyd	CF40 2EL
Newport Rd – Cardiff	Unit 5, Avenue Retail Park, Newport Road, Cardiff	CF23 9AE
Albanny Rd - Cardiff	51-57 Albany Road, Cardiff	CF24 3LL
Cowbridge Road East - Cardiff	165 Cowbridge Road East, Cardiff	CF11 9AH
Carmarthen	Stephens Way, Carmarthen	SA31 2BG
Colwyn Bay	Unit 2, Bay View Shopping Centre, Colwyn Bay	LL29 8DG
Connah's Quay	Quay Shopping Centre, Connah's Quay, Deeside	CH5 4WL
Crosshands Ind. Est. - Llanelli	Crosshands Business Park, Heol Stanllyd, Crosshands Industrial Est, Llanelli	SA14 6RB
Cwmbran	Gwent Square, Cwmbran	NP44 1PW
Flint	Flintshire Retail Park, Holywell Road, Flint	CH6 5GB
Holywell	North Road, Holywell, Flintshire	CH8 7TQ
Llandudno	Mostyn Champneys Retail Park, Llandudno	LL30 1RT
Vaughan St - Llanelli	9 Vaughan Street, Llanelli	SA15 3UA
Station Rd – Llanelli	Station Road, Llanelli	SA15 1AW
Bridge St – Llanelli	Bridge Street, Llangefni	LL77 7PP
Merthyr Tydfil	Unit C3, Pentrebach Retail Park, Pentrebach Road, Merthyr Tydfil	CF48 4TQ
Milford Haven	Unit 1a, Havens Head Retail Park, Milford Haven	SA73 3AU
Ebbw Vale	14-19 James Street, Ebbw Vale	NP23 6JG
Newport West Retail Park	Newport West Retail Park, Docks Way, Newport	NP20 2NS
Pontardawe	Unit 4, Pontardawe Retail Park, Pontardawe	SA8 4EG
Pontypridd	Midway Park, Upper Boat, Pontypridd	CF37 5BL
Prestatyn	86 High Street, Prestatyn	LL19 9BG
Pwllheli	New Street, Pwllheli	LL53 5HG
Rhyl	Marsh Road, Rhyl	LL18 2DF
Gorseinon – Swansea	Gorseinon Retail Park, High Street, Gorseinon, Swansea	SA4 4DJ
Parc Tawe North - Swansea	Parc Tawe North, Swansea	SA1 2AL
Phoenix Retail Park – Swansea	Unit 5, Phoenix Retail Park, Phoenix Way, Swansea	SA7 9EG
Parc Cwmdu – Swansea	Parc Cwmdu, Carmarthen Road, Cwmdu Retail Park, Swansea	SA5 8LJ

Tredegar	Gwent Shopping Centre, Tredegar	NP22 3EJ
Port Talbot	Aberafan Centre, Port Talbot	SA13 1NG
Wrexham	Unit 1, Holt Road, Wrexham	LL13 8DH
Ystradgynlais - Swansea	Gurnos Road, Ystradgynlais, Swansea	SA9 2JP