A retrospective: Then and now

This retrospective infographic looks at how the Top 250 has changed over the last 15 years

Finding growth has been a challenge

9.1% 5.4% 4.8%

FY2006 FY2011 FY2016

Top 250, 5-year retail revenue CAGR

28.7% 22.1% 20.9%

FY2006 FY2011 FY2016

Fastest 50, 5-year retail revenue CAGR

The average annual rate of growth, on a currency-adjusted basis, for the Top 250 in FY2016 is about half what it was 10 years ago.

Even the Fastest 50 retailers are not growing as quickly as the group once did.

A markedly different looking Top 10

FY2001

1. Wal-Mart
2. Carrefour
3. Ahold
4. Home Depot
5. Kroger
6. Metro
7. Target
8. Albertson's
9. Kmart
10. Sears

FY2016

1. Wal-Mart
2. Costco
3. Kroger
4. Schwarz Group
5. Walgreens Boots Alliance
6. Amazon
7. Home Depot
8. Aldi Group
9. Carrrefour
10. CVS Health

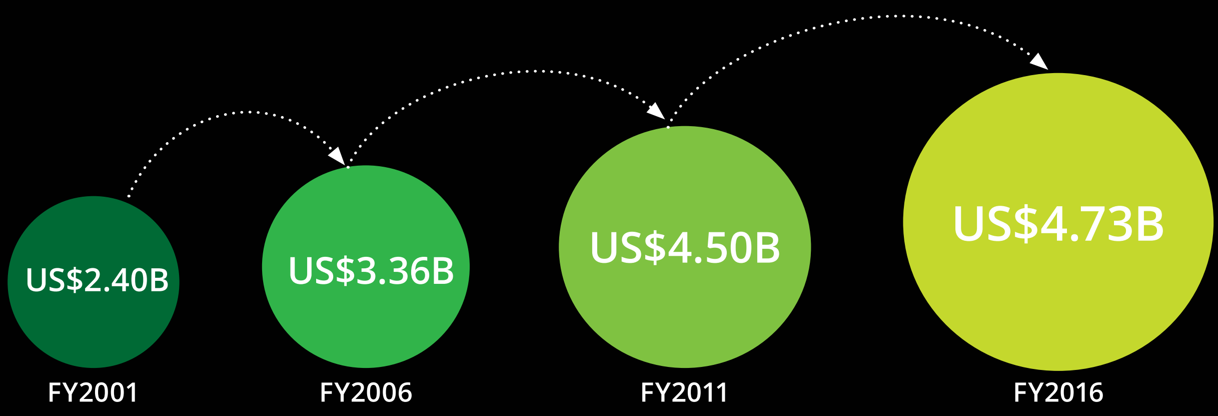
Wal-Mart has retained its pole position at the top of the retailer leader board for over 20 years.

Only 4 of the Top 10 retailers in FY2016 were on the Top 10 list in FY2001.

Amazon has skyrocketed from No. 157 in FY2001 to No. 6 in FY2016 as its retail revenue approaches US$100B.

Source: Deloitte Touche Tohmatsu Limited. Global Powers of Retailing 2003 (for FY2001 data), 2008 (FY2006 data), 2013 (FY2011 data) and 2018 (FY2016 data).

The minimum retail revenue required to be among the Top 200* has increased steadily over the years



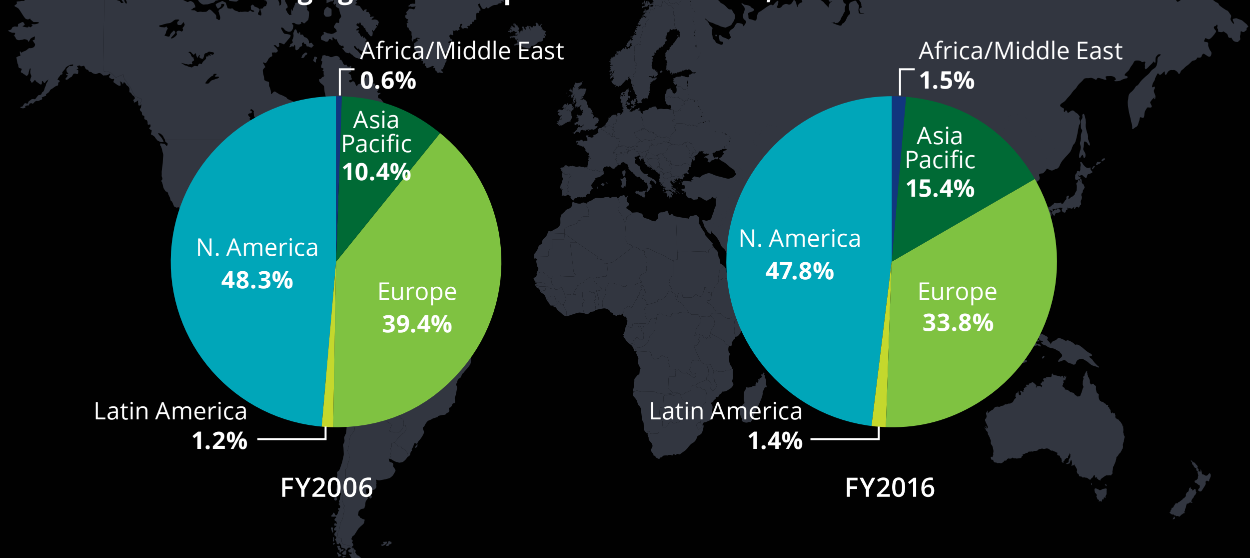
* Top 200 used for comparison as the FY2001 list was for the Top 200

Europe loses ground to Asia Pacific and some emerging markets

Struggling European economies, Brexit and weak performances by some big European-based retailers in recent years, including the grocery sector—caused Europe's share of Top 250 revenues to drop from 39.4% to 33.8% in just 10 years.

Retailers from China, Japan and the rest of Asia Pacific are gaining ground, along with some players from emerging markets in Africa and the Middle East.

Changing share of Top 250 retail revenue, FY2006 to FY2016



Source: Deloitte Touche Tohmatsu Limited. Global Powers of Retailing 2003 (for FY2001 data), 2008 (FY2006 data), 2013 (FY2011 data) and 2018 (FY2016 data).