



The Future of Retail

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Learning about trends

- Work with 16 companies, from seed to retail
- Working extensively with our clients
- Learning culture within our company
- Forward-thinking meetings



Trend #1 - The Millennial Consumer

- Food curious
- Transparency
- Clean labels
- Fresh food
- Eco-friendly options



The Millennial Disruption

- Where they buy
- What they buy
- How they buy



Trend #2 – Direct to Consumer/Online Shopping

By 2025, 20% of all food by will be purchased online.

- Click and collect/Home delivery
- Phone, tablets or laptops
- Produce is winning
- Meat/Protein is winning



Disruption of Direct-to-Consumer

Less Impact:

- Display
- Signage
- People
- Demos
- In-store marketing



More:

- Geotargeted digital
- Event marketing
- Retailer online ecosystem

Trend #3 – Food consumed at home will be purchased in more places than ever

meal kits
direct from farmer
supermarkets drugstores
garden
supercenters
specialty store
community garden
discount stores
farmers markets
convenient stores
online
co-op



Trend #4 – Format Disruption

Who will win:

- Box stores will gain share (Lidl/Aldi)
- Regional players (HEB/Wegmans)
- Niche Players (Trader Joes)

Who will lose:

- Middle market
- Undifferentiated

*Massive store closings



Trend #5 – Retail Technology

- Customization & personalization
- Cashless checkout
- Automatically replenished
- Amazon Echo
- Seamless shopping



Retail Technology Opportunities

More:

- Personalization
- Service
- Sharing
- Knowledge
- Education
- Transparency
- Solutions



Trend #6 – Health & Wellness

Intersection personalized medicine and deep nutrition

We will shop by affliction

- High blood pressure, cognitive issues, special diets, heart health, diabetes

Growth in organics



Health & Wellness Opportunity

Address holistically

- Easier to shop
- Knowledgeable people
- Clean labels
- Credible information sources



Trend #7 – Urban Agriculture

- Greenhouse technology
- Aquaponics
- Hydroponics
- Converted warehouses



Urban Ag - New Products

- Tomatoes
- Peppers
- Lettuces
- Salad Greens
- Cooking Greens
- Berries
- Melons
- Eggplant



Disruption of Urban Ag

- Land values and Salinas
- Inflow of private equity funds
- Localization of fresh produce
- A shift in power of produce



Thank You!

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