Managing Director’s Report

“The SPAR ethos of partnership and collaboration provides a solid foundation for future success, ensuring that we grow and prosper together as we continue to meet the needs of the communities we serve.”

Tobias Wasmuth, Managing Director, SPAR International

STRONG GROWTH IN TIMES OF ADVERSITY

2020 was very much characterised by the impact of the global COVID-19 pandemic and its severe consequences, but it was also a year which saw accelerated growth as a result of the dedication and focus of our highly committed SPAR colleagues across all parts of our global SPAR network.

The terrible impact of the pandemic on a global scale and the rapid pace of its spread across multiple countries could not have been predicted, but we responded with great urgency and speed. However, it is situations like these that bring out the best in people and we at SPAR can be very proud of the selfless and brave response of the SPAR worldwide organisation.

Our Annual Review for 2020 provides just a snapshot of how our more than 410,000 SPAR colleagues across over 13,500 stores fulfilled an essential role in supplying their local communities with fresh food and daily essentials to those who needed them most.

SPAR, as a leading global retailer, has a major responsibility and an essential function to fulfil. We worked hard throughout the year to maintain the supply of products to our stores, to make sure our stores were safe and secure, whilst also scaling up our online channels and helping the wider communities we support in large scale and innovative ways.

Our SPAR country initiatives included working with local charities to ensure that local communities, who were often older and self-isolating, received fresh supplies. In all markets, the established local supply chain was critical to our success, and SPAR local and regional sourcing initiatives not only provided access to market for existing suppliers, but also for new suppliers whose traditional channels of distribution had been significantly diminished.

The entire SPAR worldwide organisation was able to make a difference through the resourcefulness and responsiveness that comes from our integrated local presence, and together we were able to respond to the needs of our communities with speed and agility.

The response to the COVID-19 pandemic succeeded in highlighting the collective strength of the SPAR family, the competitive advantages of our multi-format strategy, and the critical role of independent retailing in societies and communities across the globe.

Thank you to all SPAR colleagues worldwide that have selflessly continued to work and be there for our customers. Thank you, too, to our suppliers and business partners worldwide that have collaborated so well and supported us through the crisis. Together, we have persevered and delivered a strong performance in the most adverse of times.

In this unprecedented year, requiring resilience and agility like never before, annual sales growth of 7.4% and total turnover of €39.8 billion for 2020 represents a remarkable achievement by the SPAR Brand globally.
OUR WORLDWIDE PERFORMANCE

Despite the challenges of 2020, the SPAR brand continues to grow across all five global regions. The global retail turnover of €39.8 billion represents a 7.4% increase over the previous year. A total of 13,501 stores in 48 markets with retail sales of 74.5 million square metres sold €1.2 billion on 2019. The company excelled in its performance with highly impressive revenue growth of 16% to record total sales of €8.3 billion – up from the previous year of €7.0 billion. SPAR's maturity markets in Western Europe experienced annual growth of 10%. The growth was driven by both strong customer engagement and the rapid adoption of technology and innovation which in turn was measured by the trust and loyalty of SPAR's customers.

A key feature in the SPAR model of independently owned and operated stores, is the confidence that shoppers around the world have in the SPAR network, at every level, who are connected with customer needs through our multi-format store proposition and the rapid adoption of technology and innovation which in turn was measured by the trust and loyalty of SPAR's customers.

Across the network, the SPAR model of independently owned and operated stores, connected with customer needs through our multi-format store proposition and the rapid adoption of technology and innovation which in turn was measured by the trust and loyalty of SPAR's customers.
Internationally, we aim to target our expansion into new territories into Europe, as well as Africa and the Middle East. Plans are an advanced stage for the launch of the SPAR Brand’s two new members, and working together with our SPAR country organisations, we shall continue to innovate our retail proposition across our multi-format range taking from ranges ranging from 30 countries to gain greater synergies in large scale hypermarkets.

As we look to the future, we do so with confidence. SPAR has shown great resilience through the crisis of 2020, and we shall work to ensure that new opportunities and growth, with accelerated developments in retail and across our supply chain, are well placed to build on this strong foundation.

As a consequence, we shall continue to scale up our operating model, leveraging our international presence and the resilient global supply chain which comprises retail representatives from independent retailers and company-owned stores around the globe. Since being founded in the Netherlands in 1932, a cornerstone of the success of SPAR has been the Guild system which ensures a high standard of retail and division to discuss strategic direction and solutions.

The Board members conduct visits to independent retailers coinciding with their meetings each quarter in a different country. The Board members provide visits to the SPAR International, the Board members can meet with the International SPAR Guild, which comprises retail representatives from several markets, representing the needs of independent retailers and company-owned stores around the globe. Since being founded in the Netherlands in 1932, a cornerstone of the success of SPAR has been the Guild system which ensures a high standard of retail and division to discuss strategic direction and solutions.

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We can expect a continuation of the polarisation of the retail industry. The COVID-19 pandemic has accelerated long-term, prevalent trends in the retail industry. We can expect a continuation of the polarisation of large scale hypermarkets. The advantages of this intensity of cooperation, and the benefits of close international cooperation wrought by new, remote ways of working. A key positive factor of the last year has been the benefits of cross international cooperation enjoyed by new, remote ways of working. The advantage of each of our markets is that our SPAR teams are increasingly able to share the best of international practices and scale, whilst adding purposeful value to the local communities we serve.

OUR PROMISE
To enhance the competitiveness, productivity and profitability of our retail and wholesale partners worldwide thus ensuring the continuous development of our brand presence and brand value.

OUR GOALS
For the U.C. we need to:

1. Increase our market share and choice for partners globally.
2. Fast track development of regional retailers in the face of international competition.
3. Provide insights and resources to allow our partners to excel globally.
4. Lead and innovate retail trends and developments.
5. Grow and develop our SPAR people globally.
7. Leverage our scale in international training and people development programs.
8. Fast track development of regional retailers in the face of international competition.

OUR STRATEGIC FOCUS

1. Targeted growth through EXPANSION.
2. Targeted growth through innovation.
3. Targeted growth through DIGITAL solutions and services.
4. Generating value through better BUYING.
5. Generating value through PROCUREMENT.
6. Leveraging our scale in international training and people development programs.
7. Collaboration with our BOARDMEMBERS.
8. Collaboration with our SPAR INTERNATIONAL BOARD.
9. Leveraging our scale in international training and people development programs.

SPAR INTERNATIONAL BOARD

Through our existing network of the largest European market, we expect to see a fast track development of regional retailers in the face of international competition.

Chairman
Dominic Hall, United Kingdom

Members
Gerdon Dowse, Austria
Retired 01.01.2020
Fritz Prauchner, Austria
Appointed 01.01.2021
Paul Klotz, Italy
Castel Johannes, Norway
Domenic Hall, United Kingdom
Tobias Weintuhl

SPAR International Annual Review 2020

8
As a food retailer present in 48 countries around the world, SPAR is COMMITTED TO ADDING VALUE TO THE COMMUNITIES IN WHICH WE OPERATE. As a global brand, we embrace our responsibility to support social and environmental prosperity for all. This sense of responsibility lies at the heart of the responsible retailing strategy, comprising SIX TARGET AREAS:

RESPONSIBLE RETAILING

COMMUNITY

SOURCING

ENVIRONMENT

HEALTH

CLIMATE

PEOPLE

Our six pillar strategy encompasses global SPAR Partner strategies on health, sourcing, community, climate, environment, and people. In 2020, as the year has been characterised by global, rapid operational changes have globally affected our retail businesses, SPAR’s focus remained on our core retailing initiatives. As consumer and industry priorities shifted, operational changes to address health, diets, reduced climate impacts, and responsible sourcing practices have been implemented to ensure our opportunity to make a real and tangible impact on the communities we serve.

This community focus has prompted additional investments into responsible retailing and placed SPAR in a strong position to lead in global and region-specific issues.

All SPAR operations are tailored to meet global and local market requirements. The Development Director, Global Retail, SPAR Internationalplay a role in shaping and meeting regional policy and global agendas such as the UN Sustainable Development Goals. SPAR operators also play a role in addressing food security issues and have a reduced impact on the environment, providing sustainable and healthy food options for consumers and retailers alike.

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While SPAR has a strong global presence, it is fundamentally and intrinsically driven by committed independent local retailers who win the heart and loyalty of their communities. Retailers are truly positioned at the heart of their communities, supporting those most in need, in line with SPAR’s responsible retailing strategy.

COMMUNITY AND PEOPLE

Last year, SPAR supported its communities by providing aid to local food banks, charities, and schools. From Europe and Southern Africa to Asia and the Middle East, SPAR Partners stepped up their activities to help close the gap in these areas.

In Europe, SPAR Gran Canaria tripled the number of donations it made in the same period the previous year. It also increased funds and donations allocated to local projects to counteract the impact of the COVID-19 pandemic on family budgets. SPAR Gran Canaria donated more than 24,800kg of food to over 105,000 vulnerable families and community charities across the country. During the 2020 lockdown, SPAR Austria stepped in to offer quick and easy solutions to frontline workers as well as 8 million yuan (over €2 million) to 137,000 families. In Asia Pacific, China’s SPAR Shandong partner, Jiajiayue Group, supplemented the existing sourcing of produce to support by stocking over 6,100 products that have been manufactured within a 30-kilometre radius of ALT (SPAR) Supermarket using Automotive Robotics. In Italy, SPAR operators already carried out a lot of regional and local activities, and they extended their agreements which ensured customers had access to high-quality range of products made throughout the pandemic, despite supply chain challenges. To mitigate the impact of the closure of hotels and restaurants and the resulting outlook, they worked closely with local authorities and trade associations to find new markets for their goods, and 1,600 preferred farming fields were planted to offer fresh produce to local physical stores.

In the Middle East, SPAR UAE and its Me Gusta (I like it) local sourcing initiative. These products, normally sold to the foodservice sector, are delivered to over 137 SPAR stores, as well as various other retail locations, via its central and local warehousing facilities. This farm-to-fork initiative is delivered to over 137 SPAR stores, as well as various other retail locations, via its central and local warehousing facilities. These products are normally sold directly to the foodservice sector, but during the pandemic, many smaller growers and producers, which traditionally supplied the Horeca sector, urged a new market for their goods. The unprecedented shift in demand resulted in SPAR operators expanding their sourcing strategies to include local produce. In Croatia, an additional 60 new suppliers have been onboarded to the central and local warehousing facilities. Fresh produce from these participating suppliers is delivered to over 137 SPAR stores, as well as various other retail locations, via its central and local warehousing facilities.

Over 105,000 FAMILIES SUPPORTED FOR FOOD DONATIONS FROM SPAR CHINA IN 2020

In Africa, SPAR Ghana donated 61,000kg of food to over 105,000 vulnerable families and community charities across the country. During the 2020 lockdown, SPAR Ghana donated 61,000kg of food to over 105,000 vulnerable families and community charities across the country. During the 2020 lockdown, SPAR Ghana donated more than 2,700 nurses, doctors, and other healthcare professionals. SPAR UK operator Ergon, awarded £25,000 in cash to 50 local charities across the country. In South Africa, a partnership between SPAR and the NGO Operation Hunger saw 3,000 families receive much-needed food parcels, including 1,600 preferred farming fields. Theseproducts are normally sold to the foodservice sector, but during the pandemic, many smaller growers and producers urged a new market for their goods. The unprecedented shift in demand resulted in SPAR operators expanding their sourcing strategies to include local produce.

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Considering the challenges brought on by COVID-19, prioritising customer and colleague safety and fulfilling volatile supply chain demands became key focus areas during 2020. Consequently, although restoration during this time initially slowed in most geographies, the pipeline for growth is strong, and the outlook for development remains positive.

A key highlight of 2020 has been the launch of SPAR in Ghana, after an intense period of collaboration, despite travel restrictions, that saw the highly successful launch of the SPAR Brand within five months of the license having been awarded to the Economic Distribution Company of Ghana (Eco di) for the conversion of all stores to SPAR. With a young and growing population of over 30 million, combined with sustained economic growth and political stability, Ghana offers a solid basis for the growth and development of SPAR in west Africa.

Furthermore, SPAR International is evaluating expansion via new potential licence partners in Latin America, Eurasia, the Baltics, the Balkans, and the Middle East. As a result, the upwards trajectory in SPAR country growth is set to continue.

In Western Europe, where SPAR has a presence in 16 countries, a substantial increase in retail turnover of 12% was achieved, bringing store sales to €25.61 billion from 10,038 stores.

The SPAR multi-format strategy in Europe spans INTERSPAR Hypermarkets to SPAR Express convenience stores. The combination of independently operated and company-owned stores within a coordinated national retail network supports deep market penetration.

SPAR Italy opened 159 new SPAR stores, SPAR Spain launched 29 SPAR stores, and SPAR Austria increased its store numbers by 21 to 1,519.

The introduction of a new SPAR partner, Gruppo 3A, in Italy contributed strongly to sales and store number growth in Europe. The new partner converted all 110 existing stores in its portfolio to the SPAR Brand throughout the first quarter of 2020. Independent SPAR retailers in Italy continue to benefit from extensive and awarded DESPAR Own Brand, high retail standards, and a highly efficient supply chain.

Successful growth in forecourt retailing continues, with SPAR Switzerland’s partnership with AVIA to develop 60 new SPAR Express stores. This development builds on the ongoing success of the SPAR Express forecourt format throughout Europe and Southern Africa.

A recent addition to the SPAR family, SPAR Malta, opened its first supermarket in 2020 and successfully launched a complete e-commerce solution within ten days. Despite the pandemic challenges, SPAR Malta is now achieving sales growth of 110%, which bodes well for future growth and success.

SPAR Netherlands’ online shopping solution, fulfilled by its independent retailers, grew rapidly in 2020. This growth is complemented by dynamic growth in petrol forecourts in partnership with the EG group, which offers an attractive and convenient alternative for customers seeking to complete their top-up shopping with ease.

Over the past five years, SPAR ADDED MORE THAN 1,000 STORES and a combined sales area of over 250,000m² in 48 COUNTRIES across FOUR CONTINENTS.
Throughout 2020, SPAR countries expanded their service to communities with additional formats such as temporary ‘pop-up’ SPAR stores in Switzerland and the UK and an innovative one-person SPAR store in the Netherlands. Rapid developments in e-commerce and home delivery supported SPAR retailers in adapting quickly to meet evolving customer needs. SPAR is present and growing in 11 countries in Central and Eastern Europe and has a strong portfolio of 13,501 stores generating a retail turnover of €8.62 billion in 2020.

SPAR Hungary is the largest retailer in Central and Eastern Europe, achieving a sales growth of 7.4% and retail sales of €42.68 billion in 2020. SPAR Croatia celebrated its 15th anniversary in 2020 and ended the year with 118 stores, with a total area of 164,343m². SPAR Croatia achieved a total turnover of €733.01 million in 2020 and achieved a total sales area of 164,343m². SPAR Croatia celebrated its 15th anniversary in 2020.

SPAR Poland came under new ownership in 2019. This reset has provided SPAR Poland with a focus on operational efficiency and retail excellence. SPAR Poland achieved a sales turnover of €550 million and sales growth year-on-year of 150%, respectively. E-commerce grew in Hungary and Slovenia during the pandemic. This strong growth has brought SPAR store numbers in Georgia to 272. As a result, the six SPAR partners in 2020 achieved a sales turnover of €1.73 billion in 2020. Further export expansion means SPAR now has presence in Zambia’s top five cities – Lobito, Luanda, Benguela, and Kuito, which are known for their high-income population and five world class SPAR Supermarkets. SPAR in Moscow is the first to launch a contemporary SPAR CENSA coffee concept, developed in collaboration with SPAR International.

SPAR China successfully expanded in targeted regions by developing agile and flexible store formats. O2O channel strategies, and competitive fresh food concepts. SPAR China continues to innovate with additional services, including new home delivery, community-based group buying, and shopper engagement programmes. SPAR’s regional growth strategy has seen the total presence increase significantly over the past five years.

SPAR has further expanded to a presence on the African continent, working with local operator EcoDi to launch SPAR in Ghana. By the end of 2020, SPAR Ghana had 10 SPAR stores in the capital city of Accra, with the brand’s presence increase significantly over the past year.

In Asia-Pacific, a retail turnover of €1.88 billion was reported in 2020, with five countries now operating a combined 514 SPAR stores across multiple formats.

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In-the-Middle East, the 2020 trading environment proved challenging. In addition to the stresses of the pandemic, population decrease of over 25% resulted in reduced consumption and decreased consumer confidence. SPAR Oman’s precarious market saw sales growth of 20% resulting in reduced consumption and decreased consumer confidence. SPAR Oman’s precarious market saw sales growth of 20% resulting in reduced consumption and decreased consumer confidence. SPAR Oman’s sales grew by 29.8% to €46.7 million.

SPAR Qatar’s sales grew by 82.5% to €917.57 million. Despite new store openings being impacted by the COVID-19 pandemic, SPAR KSA expanded in Southern Africa with 15 SPAR stores, 15 SPAR Express stores, the addition of 29 Tops to SPAR Liquor stores, and the launch of 12 SPAR brand hotels and 15 Safari value stores. In addition, 987 SPAR and 70 Tops stores in the Middle East, Saudi Arabia, and Egypt increased their market share to 25% of sales.

SPAR Russia achieved sales of €1.73 billion in 2020. Further export expansion means SPAR now has presence in Zambia’s top five cities – Lobito, Luanda, Benguela, and Kuito, which are known for their high-income population and five world class SPAR Supermarkets. SPAR in Moscow is the first to launch a contemporary SPAR CENSA coffee concept, developed in collaboration with SPAR International.

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As part of the SPAR worldwide organisation, our retailers and regional wholesalers benefit from proven international retail expertise while maintaining local independence in the markets they serve. By combining global best practice and pooled resources with local team members’ unique skills and networks, SPAR stores thrive in their respective markets.

MULTI-FORMAT STRATEGY

SPAR operates a multi-format strategy. The global portfolio comprises formats tailored to shopping missions and local customer needs: SPAR – the local neighbourhood supermarket; EUROSPAR – the supermarket for weekly family shopping; INTERSPAR – the hypermarket format; and SPAR Express – the convenience format for high traffic and transient locations.

Across all formats, SPAR provides online grocery services through store-picked orders utilising the extensive store network for agility and speed of delivery.

Proximity retailing, a strength of SPAR, has been a key growth channel, with sustained solid compound sales growth prior to the COVID-19 pandemic accelerating further in 2020.

In addition, a growing preference for shopping locally and within the community has provided a substantial boost for our SPAR Express Convenience and SPAR Promarket stores, performing all formats with a growth of 13.9%.

SPAR Denmark is showcasing the best in inner-city retailing with its new 625m² supermarket on the St. Kongensgade, a well-known historic street in central Copenhagen. The new store brings an expanded range of to-go, healthier choices, and local products to this vibrant area of the city. The range instore has an international character and features a SPAR Natural section focusing on health and sustainable food choices.

First developed by SPAR International in 2017, SPAR Natural perfectly meets the ever-growing consumer demand for healthier and more sustainable food choices.

SPAR operates over 13,500 stores across four continents worldwide. By adapting to the local market requirements through our strong brand positioning, SPAR stores deliver a best-in-class grocery experience to over 14.5 million customers a day.
The competitive advantages of the SPAR multi-format strategy and the critical role of independent retailing in societies and communities across the globe were clear throughout 2020.

Eurospar is the large supermarket format with stores sized over 2500m². Outside of Europe, this format is called SuperSpar. With a high contribution of sales derived from fresh categories and offering wide range of groceries, both Eurospar and SuperSpar have performed exceptionally well during 2020.

Eurospar, in particular, has continued its dynamic growth in Russia, with the expansion of the brand to the Kaliningrad and Volgograd regions. In central Moscow a new Eurospar format was opened to showcase the latest evolution of the format including extensive in-store dining and coffee services. SPAR Russia launched the latest generation of Eurospar stores with design support from SPAR International which saw the brand extend its presence to the towns of Vasilkovo, Bolshoye, and Maloye Isakovo. Overall, Eurospar grew in 2020 to represent 50% of the sales area worldwide.

In China, customers living within a 3km radius of major SPAR Panda stores can have their fresh groceries delivered within 30 minutes from order receipt, meaning each order can be picked and packed in-store within 5 minutes.

Digital solutions

Since the start of the COVID-19 pandemic, retailers across the world have had to quickly ensure store space remains safe for shoppers and store team members. Although in-store digital technologies have been on the rise for some years, they play an increasingly important role in maintaining a safe and comfortable shopping environment in line with social distancing guidelines.

7.45 million M² of retail sales area worldwide.

E-commerce capabilities scaled up during the pandemic, leveraging SPAR’s international physical presence to expand its online grocery presence to 20 countries. As a result, SPAR is well placed for future expansion in this flourishing channel, combining growth in online demand with the strength in proximity and neighborhood footfalling. The roll-out and expansion of online-capable competitors SPAR’s strong local market position provided an increased capacity for agile and responsive on-demand online grocery retail.

Sustainability

Sustainability and energy efficiency are essential considerations in designing and developing new SPAR stores and refurbishing existing stores. Based on network-wide best practice, SPAR continues to invest in sustainable technologies and operations to reduce CO2 emissions and energy consumption.

SPAR Austria has invested heavily in sustainable energy supply for its stores. After successfully installing solar power systems on 130 SPAR stores during 2020, the company is set to roll out the system in additional stores nationwide. SPAR Austria already uses electricity generated from 100% renewable sources.

SPAR Norway has been investigating opportunities to reduce CO2 emissions and energy consumption. Realising its existing refrigeration system was not designed for Norway’s specific operating conditions, SPAR Norway set to create one that was. The new refrigeration system is projected to decrease energy use by 60%. With the new, innovative solution, SPAR Norway estimates it can lower its energy usage by 70.250 kWh per year, which will help to save more than €15,000 per store.

SPAR Norway offers a strong example of the multi-faceted approach SPAR countries employ to enhance sustainability.

Multi-Faceted Store Sustainability Strategy

Opened in 2018 in a suburb of Oslo, SPAR Snarøya store is SPAR Norway’s first entirely eco-friendly store. A strong focus on using environmentally friendly construction techniques and materials dramatically reduces both the energy consumption and the building’s carbon footprint. The 800m² SPAR Snarøya has been constructed with sustainable wood walls and ceiling and a triple-glazed glass façade. In addition, 50m² of solar panels on the façade generate over 7,000-kilowatt-hour of electricity per year, which in turn power the LED lights and materials dramatically reduces both the energy consumption and the building’s carbon footprint. The 800m² SPAR Snarøya has been constructed with sustainable wood walls and ceiling and a triple-glazed glass façade. In addition, 50m² of solar panels on the façade generate over 7,000-kilowatt-hour of electricity per year, which in turn power the LED lights and ceiling and a triple-glazed glass façade. In addition, 50m² of solar panels on the façade generate over 7,000-kilowatt-hour of electricity per year, which in turn power the LED lights and ceiling and a triple-glazed glass façade. In addition, 50m² of solar panels on the façade generate over 7,000-kilowatt-hour of electricity per year, which in turn power the LED lights and ceiling and a triple-glazed glass façade. In addition, 50m² of solar panels on the façade generate over 7,000-kilowatt-hour of electricity per year, which in turn power the LED lights and ceiling and a triple-glazed glass façade. In addition, 50m² of solar panels on the façade generate over 7,000-kilowatt-hour of electricity per year, which in turn power the LED lights and ceiling and a triple-glazed glass façade. In addition, 50m² of solar panels on the façade generate over 7,000-kilowatt-hour of electricity per year, which in turn power the LED lights and ceiling and a triple-glazed glass façade. In addition, 50m² of solar panels on the façade generate over 7,000-kilowatt-hour of electricity per year, which in turn power the LED lights and ceiling and a triple-glazed glass façade. In addition, 50m² of solar panels on the façade generate over 7,000-kilowatt-hour of electricity per year, which in turn power the LED lights and ceiling and a triple-glazed glass façade. In addition, 50m² of solar panels on the façade generate over 7,000-kilowatt-hour of electricity per year, which in turn power the LED lights and ceiling and a triple-glazed glass façade. In addition, 50m² of solar panels on the façade generate over 7,000-kilowatt-hour of electricity per year, which in turn power the LED lights and ceiling and a triple-glazed glass façade. In addition, 50m² of solar panels on the façade generate over 7,000-kilowatt-hour of electricity per year, which in turn power the LED lights and ceiling and a triple-glazed glass façade. In addition, 50m² of solar panels on the façade generate over 7,000-kilowatt-hour of electricity per year, which in turn power the LED lights and ceiling and a triple-glazed glass façade. In addition, 50m² of solar panels on the façade generate over 7,000-kilowatt-hour of electricity per year, which in turn power the LED lights and ceiling and a triple-glazed glass façade. In addition, 50m² of solar panels on the façade generate over 7,000-kilowatt-hour of electricity per year, which in turn power the LED lights and ceiling and a triple-glazed glass façade. In addition, 50m² of solar panels on the façade generate over 7,000-kilowatt-hour of electricity per year, which in turn power the LED lights and ceiling and a triple-glazed glass façade. In addition, 50m² of solar panels on the façade generate over 7,000-kilowatt-hour of electricity per year, which in turn power the LED lights and ceiling and a triple-glazed glass façade. In addition, 50m² of solar panels on the façade generate over 7,000-kilowatt-hour of electricity per year, which in turn power the LED lights and ceiling and a triple-glazed glass façade.

The result of this innovative and forward-thinking store is that it use CO2 emissions by 80%.
DIGITAL & DATA

Al SPAR, our customers are at the centre of our business. Our approach to digital transformation enables us to continually exploring new technologies that can enhance customer experience and service reliability while minimising our environmental impact. A key priority for the digital transformation of our retail stores has been widespread and large-scale investment in the roll-out of electronic shelf labels and digital signage. Introducing self-service technology at the checkout point is an important area of continued investment and has resulted in reducing our environmental impact. This speed in the adoption of e-commerce solutions and quickening the adoption of online checkout, mobile scan-and-go, and technologies such as digital signage has brought forward our investment and expansion plans in this strategically important area.

As communities entered lockdowns, the number of online grocery orders grew rapidly, and SPAR countries including Sri Lanka and Nigeria have embraced digital approaches tailored to local markets, with innovative ‘One click’ online delivery service applications launched in April that enable customers to plan their shopping trip in accordance with social distancing rules. SPAR Spain regional operator Lider Aliment has developed its ‘ShopLink’ app that combines demand forecasting, and demand planning systems have been updated to an industry leading grocery development platform. This innovative platform helps to refine the stock-flow to stores, meet customer demand, and avoid products going to waste. In Saudi Arabia, the SPAR central range management, stock forecasting, and demand planning systems have also been updated to an industry leading grocery development platform. This innovative platform helps to refine the stock-flow to stores, meet customer demand, and avoid products going to waste.

Drivers of waste through the end-to-end supply chain includes global partnerships with social impact companies. The global partnership with Too Good To Go will play a key role in reducing food waste, particularly in high-demand and high-volume markets. The goal is to minimise food waste, sell-through and clear stock before these products run the risk of going to waste. In Saudi Arabia, the SPAR central range management, stock forecasting, and demand planning systems have been updated to an industry leading grocery development platform. This innovative platform helps to refine the stock-flow to stores, meet customer demand, and avoid products going to waste.

In Norway, SPAR developed the NGFlyt app, which optimises ordering suggestions and demand forecasting to refine the stock-flow to stores, meet customer demand, and avoid products going to waste. In Saudi Arabia, the SPAR central range management, stock forecasting, and demand planning systems have been updated to an industry leading grocery development platform. This innovative platform helps to refine the stock-flow to stores, meet customer demand, and avoid products going to waste.

Digital transformation of the supply chain is a key part of SPAR’s sustainability strategy. The scale of SPAR's ability to gain insight into shopper data has continued to grow, with $41 million of digital technology spend in 2020. The scale of SPAR's ability to gain real-time visibility of close-to-expiry date, discounted food products in their SPAR app, SPAR Netherlands stores, customers can use a ‘Skip The Line’ app. Customers can choose the store, shopping time, go to code and exit without queuing. Technology is also helping to protect instore health and wellbeing. Before having their temperature checked at the entrance of stores perform body temperature checks to help prevent the spread of COVID-19. Infrared cameras have also helped SPAR retailers safeguard health and safety. In countries such as Qatar, Oman, and China, handheld scanners or stationary thermographic cameras installed at the entrance of stores perform body temperature checks to help prevent the spread of COVID-19.

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BUYING BETTER TOGETHER

SPAR International’s collaboration with its brand manufacturers was recognised with a top position in the Advantage International collaboration study of Global Retailers, which is performed every year in partnership with the EuroMonitor International and the Global Retailers. The study examines the performance of brands in the industry. SPAR International is recognised for its forward-thinking approach to collaboration and for building effective Category development and Supply Chain programmes.

Challenge Brands challenge established large FMCG brands, changing the marketplace’s status quo. These brands are typically local heroes with strong demand in their country and often take an innovative approach to new markets. SPAR International and its brand manufacturers stand out for their clear mission statement and purpose and their ability to quickly and effectively innovate in their new product development and marketing. Close collaboration with Challenge Brands such as Naturi and LiveKindly supports SPAR in meeting evolving customer demands in the areas of plant-based and organic.

RESPONSIBLE

SPAR International’s own brand products are supporting our commitment to environmental sustainability while reducing the negative environmental impacts of production and waste.

SUSTAINABLE CHOICES FOR CUSTOMERS

SPAR International has made it easier for retailers and consumers to act sustainably through a comprehensive range of SPAR Eco products. The SPAR Eco Home Care line includes seven SKUs that ensure effective and thorough cleaning without harmful or toxic ingredients. All products in the range are made with plant-based, mostly biodegradable ingredients and are certified with the EU Ecolabel. The SPAR Eco Disposables line includes eight SKUs made from sustainable materials, including paper, CPLA, bagasse, and bamboo. The biodegradable tableware is perfect for outdoor activities, such as picnics and barbecues.

The complete collection of SPAR Eco products supports our commitment to environmental sustainability while reducing the negative environmental impacts of production and waste.
The coordination of procurement, purchasing, and engagement activities has a direct and positive impact on the performance of SPAR retailers. The collaborative approach has never been more relevant than when the planet’s focus is directed to accelerate action across the globe. SPAR’s international focus on non-resellable equipment drives real cost reductions through bundling of volumes and the coordination of sourcing. The approach to procurement centres on collective buying initiatives, whereby the transfer of intelligence is leveraged to deliver savings on a net-of-price basis. This is achieved through collective buying initiatives or tender-based agreements with a portfolio of SPAR International Preferred Suppliers.

As the start of 2020, the COVID-19 virus was spreading, SPAR repositioned the tendered framework for the year, redressing key account agreements and extending terms to enable suppliers to focus on the operational priorities.

As the approach to procurement moves to SPAR-executed collective buying initiatives in the areas of store equipment and supporting stock, including roll cages. On every occasion, a coalition is formed between multiple SPAR countries with a substantial volume of purchase. The approach to tendering is a real recipe for innovation and success. A key project in Northern Ireland exemplified this approach in designing a new stock trolley that helps instore team members save time and energy costs as well as different, less time-consuming tasks. The project is a real recipe for innovation and success. A key project in Northern Ireland exemplified this approach in designing a new stock trolley that helps instore team members save time and energy costs as well as different, less time-consuming tasks.

SPAR’s programme exemplifies the Better Together strategy, giving SPAR Partners access to shared buying opportunities while providing preferred suppliers access to global market developments. This approach enables both parties to optimise in the changing times, SPAR and suppliers are collaborating to re-engineer the programme, networks are created that allow preferred suppliers to engage in new projects, strategic initiatives, and provide preferred suppliers access to, knowledge of, global market developments.

The programme offers both partners the opportunity to engage through internal events, to share information through platforms and ensure the support of SPAR’s international strategic projects and key account management. At SPAR, we believe we are Better Together. The sharing of supplier knowledge, insights, and expertise, has improved operational efficiency across SPAR. In changing times, SPAR’s collaborative approach will be key in providing our customers with the best offer in the most comfortable shopping environment.

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Over 15 MILLION FACEMASKS SOURCED GLOBALLY ENABLING SPAR RETAILERS TO BE PROACTIVE IN SAFEGUARDING THE INSTORE HEALTH AND SAFETY OF CUSTOMERS AND COLLEAGUES.

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CELEBRATING TOGETHERNESS

For many SPAR customers, the annual festive days throughout 2020 were restricted due to lockdowns. As a result, celebrations often took place at home with just close family members or even alone. SPAR Partners prolonged opening hours during the Easter weekend to protect the wellbeing of customers and helped customers mark the occasion with easy-to-follow recipes, ideas to stay entertained, as well as charitable donations.

Christmas 2020 was also unlike any other. SPAR rallied around its local communities, making it the season of giving, particularly for those in need. SPAR Hungary launched the 24th Joy to Give campaign. SPAR Switzerland and SPAR South Africa’s Make-a-Wish campaigns, whilst SPAR Italy’s Partner Maiora and SPAR Slovenia donated food to families in need. SPAR International developed the global ‘Christmas of a million thank you’s’ campaign to celebrate relationships, togetherness, and community, which was successfully implemented across seven different markets.

BRAND BUILDING

Despite the challenges posed by the pandemic, the SPAR Brand expanded into Ghana in August. The development saw the conversion of several existing supermarkets in and around the capital city Accra, focusing on the neighbourhood store format. Ghana represents the 12th market to join the SPAR family in the last three years.

2020 also saw the launch of the first global SPAR mnemonic brand logo. Mnemonic logos are a great way of driving brand recall and customer loyalty.

Entrepreneurship has always been a fundamental aspect of the SPAR Brand, and in 2020 SPAR countries continued their excellent work in promoting local entrepreneurship and start-up challenger brands. SPAR Hungary’s Hungaricool programme, Start it up, Slovenia, Start Up Croatia, and SPAR Austria’s Young & Urban campaign all aim to support local start-ups while bringing innovative new products to store shelves. This is mirrored at an international level with the SPAR International Challenger Brand programme, which offers further international market access to fast-growing and aspiring brands.

Never has the SPAR spirit of solidarity been more important to the communities in which we operate than in 2020. During the COVID-19 pandemic, shoppers looked to brands they could rely on in their time of need. In these uncertain times, SPAR retailers have been there when needed most, supporting the local communities we serve worldwide.
**SPAR Austria Removed 1,270 Tones of Sugar from 300 SPAR Own Brand Products**

SPAR Austria runs a regular Healthy Living week programmes, which SPAR Ireland has spearheaded with the Football Association of Ireland to encourage healthy eating among teenagers, helping many SPAR customers discover the health benefits and versatility of vegetarian food. SPAR Austria’s sugar reduction initiative, launched in 2018, has removed a total of 3.75 tonnes of sugar across 100 products via the removal of artificial sweeteners and the reduction in the amount of sugar in its healthy branded line by 14%. In line with the WHO’s dietary recommendations.

**Exercise and Nutrition**

As a responsible retailer, SPAR is committed to offering customers healthy options. Given the current climate, it has become even more critical to act in the best interest of the progression. Nutritious foods, protein alternatives, reduction initiatives, and exercises have become prominent features of many SPAR countries’ ongoing brand plans. In Norway, Ireland, Belgium, and Switzerland, exercise and nutrition are prominent features of foods, protein alternatives, reduction initiatives, to be at the forefront of this progression. Nutritious shopper needs, in line with the latest trends. Content and services with a smarter navigation of content and services with a smarter navigation important brand and safety messages to customers. SPAR Austria’s sugar reduction initiative, launched in 2018, has removed a total of 3.75 tonnes of sugar across 100 SPAR Own Brand products via the removal of artificial sweeteners and the reduction in the amount of sugar in its healthy branded line by 14%. In line with the WHO’s dietary recommendations.

**FINDING CONNECTION**

As a result of COVID-19, many people had to adjust their usual routines by working from home, socially distancing, and home-schooling their children. Beyond providing the high-quality products customers are used to and promoting healthy lifestyles, SPAR countries used their social media channels to support and inspire customers in maintaining a healthy body and mind. The majority of SPAR markets are communicating the benefits of certain products and healthy food preparation alternatives to help customers and communities eat healthier and balanced diets. SPAR Hungary, for example, shared online a comprehensive overview of which nutrients can be found in different fruits and vegetables. SPAR Ireland and SPAR Australia shared healthy meal preparation alternatives to help communities and schools adjust their usual routines by working from home.

**ADAPTING SPONSORSHIP STRATEGIES**

In response to the cancellation of major sporting events, many SPAR countries adopted their sponsorships strategies in 2020 by integrating them into their social media accounts. Through this year, SPAR successfully created innovative virtual events, allowing people to participate in interactive and engaging experiences with national and local safety measures. SPAR South Africa adopted the SPAR Women’s Virtual Challenge to encourage young pupils to keep active through an engaging list of accessible sporting options. In Scotland, SPAR launched the SPAR Football Challenge in June, working with the Scottish Football Association to design exciting interactive football initiatives with Scottish national team player Lara O’Donnell.
The resilience of our operations was put to the test at the start of the year when the COVID-19 pandemic moved rapidly across the globe. Through the sharing of insights and data, SPAR operators were able to quickly prepare warehouses and transport operations to protect colleagues and continue meeting customer needs.

SPAR countries have continued to invest strongly in the supply chain across all regions. In Udine, Western Italy, SPAR initiated a significant warehouse refurbishment and extension. SPAR Hungary increased its chilled capacity in Bicske and Üllő, improving throughput and process efficiency. In China, SPAR opened a new chilled warehouse and production centre in Yantai, in addition to new regional warehouses in Jinan and Hebei.

Continuing SPAR’s supply chain expansion in Saudi Arabia, 2020 saw significant investment in a new chilled distribution centre. Additionally, the central stock management, demand planning, and warehouse management systems were updated. These upgrades significantly improve time efficiency and reduce stock levels while improving delivery fulfilment to customers.

Operational efficiency is a key element in maintaining supply chain resilience and keeping costs low. Across multiple countries, colleagues have reviewed activities by focusing on time spent, repetition, and costs to identify areas for improvement. These efforts have removed significant costs from our end-to-end operations through to the shelf in store.

In the United Kingdom, SPAR has adopted stock trollies that simplify back-of-house activities at our stores, reducing costs and improving customer service. The innovation is now being rolled out to stores across Europe. In South Africa, low-level autonomous robots are being used in goods-to-person operations, reducing walking time in slow-moving product picking by over 60%.

During a challenging year, environmental sustainability has remained a key focus throughout all our operations. The use of renewable energy sources continues to expand. In South Africa, for example, rooftop solar panel power-lighting and refrigeration systems in all of our stores are now powered by a solar power system on the rooftops of 100 stores since 2017, with plans to roll out the systems in additional stores nationwide.

Technological advancements are aiding SPAR in expanding our fleet of electrically powered vehicles. The first heavy load trucks introduced in Switzerland complement those already in use in Norway and Austria. South Africa, Switzerland, and Ireland have also enhanced battery charging capabilities in warehouses by installing equipment from our preferred supplier, Fronius, making their system 30% more energy efficient.

Across the SPAR retail and wholesale operations worldwide, our end-to-end supply chains are key to our success. Throughout 2020, SPAR countries have continued to invest in our warehouse estate, transport operations, and the flow of goods from supplier to customer.

SUSTAINABILITY FOCUS

As SPAR, we are continuously looking to integrate sustainable solutions in our operations, with partners exploring ways to minimise CO2 emissions, energy consumption, and waste.
SUPPLIER COLLABORATION

Suppliers play an important part in our end-to-end supply chain, working collaboratively on the smooth flow of products. At the start of the pandemic, we worked closely with suppliers to understand customer buying patterns. Based on insights from China and Italy, SPAR has been able to optimise stock availability and make optimal plans for delivery. In the United Kingdom, South Africa, and the Netherlands, among other countries, our transport teams arranged collections from suppliers at very short notice so that products could continue to move and be delivered to our customers.

In close collaboration with leading FMCG suppliers, projects on forecasting, demand planning, and transport optimisation were realised, increasing supplier collections, range velocity management, and reusable equipment. All these projects pave the way to reducing costs and sharing benefits.

SPAR supply chains operate as part of the wider industry. During the year, colleagues have worked closely with industry partners, theory, sharing knowledge, insights, and best practices to support the development of the wider industry.

ESSENTIAL SUPPLIES

Our strong network and supply chains proved particularly valuable in the distribution of essential goods and protective equipment in 2020. SPAR countries have not only supported teams members and customers by supplying the resources needed to protect their health and wellbeing internally, but also supported various charities and social initiatives – often going above and beyond their usual role.

In the United Kingdom, SPAR donated one million pieces of PPE to frontline Marie Curie Nurses, demonstrating their essential role across the nation and enabling staff to pick it up from their local SPAR stores.

TAKING SUSTAINABILITY ON THE ROAD

SPAR Ireland BWG Foods has become the first FMCG group in Ireland to launch a fleet of biogas powered vehicles as part of the implementation of its ambitious sustainability strategy. The SPAR operator also contributes food waste from their 22,300m² National Distribution Centre at Kilcarbery to the biogas production site at Nurney, County Kildare, making this a circular solution.

The company has launched an initial fleet of two Heavy Goods Delivery Vehicles (HGVs) fuelled with biogas in place of traditional diesel fuel, with ambitions to further increase the use of biogas as part of its increasingly environmentally friendly fuel mix. The vehicles are projected to deliver a 90% reduction in transport-related carbon emissions. The rigid 26-tonne biogas trucks are the most efficient transport vehicles across the sector and are also the quietest, meaning less noise pollution across towns and city centres.

During a visit to Northern Ireland, His Royal Highness, the Prince of Wales, visited SPAR UK Henderson Group. Accompanied on his warehouse visit by SPAR UK Chairman Martin Agnew, the Prince of Wales thanked key retail and wholesale workers for their hard work and dedication during the pandemic.

1 MILLION PIECES OF PPE DONATED TO FRONTLINE MARIE CURIE NURSES BY SPAR UK
As a global job retailer, our people are our greatest asset. During the challenges of 2020, SPAR colleagues along with the full supply chain have been there when needed most and continue to play a significant role in meeting the needs of the local communities SPAR serve worldwide.

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2020 saw accelerated growth as a result of the dedication and focus of our highly committed SPAR colleagues across all parts of our global SPAR network.

Tobias Wasmuth, Managing Director, SPAR International

77% WESTERN EUROPE
13% CENTRAL & EASTERN EUROPE
5% AFRICA & MIDDLE EAST
5% ASIA PACIFIC

46% WESTERN EUROPE
37% AFRICA & MIDDLE EAST
12% CENTRAL & EASTERN EUROPE
5% ASIA PACIFIC

72% WESTERN EUROPE
13% CENTRAL & EASTERN EUROPE
11% AFRICA & MIDDLE EAST
2% ASIA PACIFIC

56% WESTERN EUROPE
27% CENTRAL & EASTERN EUROPE
16% AFRICA & MIDDLE EAST
1% ASIA PACIFIC

404
665
1171
1480
552

11.1
16.7
17.7
13.7

GLOBAL STORES PER REGION
GLOBAL SALES PER REGION
GLOBAL SQM SALES AREA PER REGION
SPAR AUSTRIA
With sales of €6.3 billion and impressive growth of 16%, SPAR Austria becomes the market leader in the Austrian grocery trade during 2020, after being a regional growth leader for over a decade. During 2020, SPAR gained 1.8% market share, the highest rate of growth in years.

In 2020, the total number of SPAR, EUROSPAR, and INTERSPAR stores in Austria grew from 1,498 to 1,519, reaching a total sales area of 16%, SPAR Austria became the market leader in the capital city and larger cities nationwide. The number of stores operating under the SPAR banner at year-end stood at 131, with the total retail sales amounting to €8.3 billion.

SPAR retailers invested extensively in new interior designs and store concepts based on the flagship store SPAR Teglholmen in Copenhagen. The modernised store focuses on convenience and fresh foods and has implemented the SPAR food waste collection tours. SPAR launched a ‘Doorstep Delivery’ service in Denmark, ensuring convenient and reliable grocery solutions for an expanding customer base.

Located in high-traffic locations, the SPAR Express stores offer a convenience format with the same competitive prices as consumers would find in supermarkets. Foodservice and food-to-go remain essential focus areas for the retailers operating the SPAR Express stores. As such, investment into expanded convenience solutions continues to grow in the country. Several retailers in the country have implemented the SPAR Contactless concept in stores, working with SPAR International to apply best practice and network learnings.

RETAIL TURNOVER €178.6 million.

SPAR DENMARK
SPAR Denmark has implemented a robust expansion plan focused on opening new stores in the capital city and larger cities nationwide. The number of stores operating under the SPAR banner at year-end stood at 131, with the total retail sales amounting to €8.3 billion.

A significant milestone has been the opening of the first EUROSPAR Supermarket in France, with the new store located in Aix-les-Bains. Contact in main line 3527 79 50 11. The two stores has benefited from best practice exchange within the international SPAR network, where the EUROSPAR format has proven increasingly successful.

With over 600 million France sales in French border areas were affected by lockdown measures, a growing number of SPAR retailers readily embraced SPAR France’s cold x-commerce platform – allowing more customers to continue shopping locally and online.

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RETAIL TURNOVER €178.6 million.

SPAR FRANCE
SPAR France performed strongly in 2020, generating a retail sales growth of 7.5%, totaling €1.1 billion. SPAR France opened a total of six new stores, bringing the total number of stores in the country to 877.

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RETAIL TURNOVER €178.6 million.

SPAR BELGIUM
SPAR Belgium achieved an exceptional growth rate of 17.7% to reach a total retail sales of €25.48 billion during 2020. Two partners – Retail Partners Groep (Grap & De Groote) – now operate 316 SPAR-branded stores across the country.

SPAR retailers nationwide continue to invest in store modernisation, providing forward-looking shopping connections and improving sales, operating efficiency, and sustainability by means of digital communications and digital media channels. Increased consumer concerns about the range of services and the quality assurance offered.

SPAR Denmark has implemented a robust expansion plan focused on opening new stores in the capital city and larger cities nationwide. The number of stores operating under the SPAR banner at year-end stood at 131, with the total retail sales amounting to €8.3 billion.

A significant milestone has been the opening of the first EUROSPAR Supermarket in France, with the new store located in Aix-les-Bains. Contact in main line 3527 79 50 11. The two stores has benefited from best practice exchange within the international SPAR network, where the EUROSPAR format has proven increasingly successful.

With over 600 million France sales in French border areas were affected by lockdown measures, a growing number of SPAR retailers readily embraced SPAR France’s cold x-commerce platform – allowing more customers to continue shopping locally and online.

Located in high-traffic locations, the SPAR Express stores offer a convenience format with the same competitive prices as consumers would find in supermarkets. Foodservice and food-to-go remain essential focus areas for the retailers operating the SPAR Express stores. As such, investment into expanded convenience solutions continues to grow in the country. Several retailers in the country have implemented the SPAR Contactless concept in stores, working with SPAR International to apply best practice and network learnings.

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SPAR FRANCE
SPAR France performed strongly in 2020, generating a retail sales growth of 7.5%, totaling €1.1 billion. SPAR France opened a total of six new stores, bringing the total number of stores in the country to 877.

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In Greece, SPAR has been undergoing a strategic retail strategy is operational nationwide, with the 75% decline in Greece’s tourism impacted safety and continuous operations at SPAR stores, boosting customer experience. The additional technologies to create a convenient shopping environment.

In India, SPAR Italy was adapt at responding to the COVID-19 pandemic by committing to new safety and continuous operations at SPAR stores, supporting a group of independent retailers who joined the SPAR brand. Groups had ccess to groceries, SPAR Portugal managed to successfully launch their e-commerce solution

In 2020, SPAR Portugal acquired a range of supermarkets in high-street locations, including Lianes, Usually and Minafo. SPAR Portugal has emphasised the use of innovative strategies to maintain and retain customers.

In 2020, SPAR Malta has an active social media presence, enabling cooking at home more enjoyable. SPAR Cyprus also launched the nation’s first concept store, the “The Tosti Club.” The store in the store concept continues to evolve and offers customers a variety of food products and fresh beverage options, in the Vigo, the new supermarket has a modern look and design that fits well into the business model, making it easy to see how to use...

In Portugal, SPAR continues to draw on international best practice in retail and marketing. The SPAR brand’s footprint continues to expand, achieving significant growth. In 2020, SPAR Portugal acquired a majority stake in premium sandwich chain, The Tosti Club. The store in-store concept continues to evolve and offers customers a variety of food products and fresh beverage options, in the Vigo, the new supermarket has a modern look and design that fits well into the business model, making it easy to see how to use...

In Norway, SPAR has been a leader in developing innovative solutions for digital and online retailing. In early 2020, SPAR Norway created a new brand identity, SPAR's voluntary trading concept. The brand’s presence in city centres, embracing high-street retail stores, the brand’s growing capabilities in digital and online retailing have created an additional avenue for sales increase during the 2020 lockdown. Although the retail sector performed particularly strongly. SPAR Express convenience stores. The total retail sales area is 808,325m².

In 2020, SPAR Malta saw total retail turnover increase by 8.4% in 2020, with a growth of 10.4% reporting retail turnover of €112.5 million. At the start of the pandemic, SPAR Portugal focused on intrastore safety during limited opening hours. To ensure customers continued to have easy access to groceries, SPAR Portugal was successful in launching their e-commerce solution within just one week. The online platform features a wide range of products, including items from their existing portfolio of three SPAR stores. The total retail turnover was reported for the year, which was €2.5 billion, representing total turnover of 23.5%, bringing total turnover for the year to €828.6 million. Already operating on a strong growth path in 2020, SPAR could quickly upscale online sales to help local customers shop from home.

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SPAR UK saw year-on-year growth in sales of 11.82%, with a total retail turnover of €3.7 billion reported from 2,530 stores for the year. Throughout the pandemic, all five SPAR UK wholesalers delivered excellent service to stores while providing considerable support to their retail members. SPAR supported multiple charities to ensure everyone had access to food and essentials and the ability to shop in a safe environment.

Despite the pandemic, several independent retailers joined the SPAR family during 2020, and over 300 new store openings and refurbishments took place during the year. SPAR UK stores were recognised with 44 industry award wins. SPAR UK launched over 100 new own brand lines in 2020. The range won a total of 75 awards for quality, including the respected BBC Good Food Christmas Taste Award for SPAR Luxury Mince Pies. SPAR joined the UK Plastics Pact, a wider global movement that aims to reduce plastic waste collaboratively. SPAR UK has achieved huge success in removing virgin plastic from 53 own brand products and preventing black plastic from going into the landfill. SPAR UK signed up to BRC Climate Action Roadmap Ambition – Net Zero emissions by 2040 and rolled out the Too Good To Go app to stores.

With the UK exiting the EU in December 2020, SPAR UK worked throughout the year to ensure all operations were Brexit ready. All five SPAR wholesalers continue to provide exceptional service to stores by making timely and accurate deliveries from their first-class warehouse and distribution facilities.

SPAR SPAIN
The 13 regional partners of SPAR Spain achieved a turnover of €1.7 billion, showing an exceptional growth of 7.22% compared to the previous year. SPAR Spain opened 29 new stores, bringing the total retail sales area to 515,568m² across 1,255 stores, a growth of 2.37% from last year’s figure. From the beginning of the pandemic, the focus was on store safety and accessibility to negotiate the country’s hard lockdowns. Neighbourhood and convenience stores were fitted with protected checkouts, social distancing guidelines, and strengthened disinfection routines in both wholesale and retail operations.

In response to the decline in tourism, SPAR actively supported local farmers by marketing surpluses that traditionally would have gone to the foodservice sector. SPAR Spain continued opening and refurbishing stores to offer an even higher service level, always keeping in mind indoor sustainability. The company continued its responsible retailing activities, focusing on providing nutritional guidance and donation of basic goods to local charity organisations.

SPAR SWITZERLAND
SPAR Switzerland achieved combined retail sales of €554 million from 192 stores with a total retail sales area of 70,508m². Total sales grew by 12.5% in constant currency values, reflecting a strong consumer preference for community-based stores and convenience over large hypermarkets.

In 2020, SPAR Switzerland added a fully electric vehicle to its distribution fleet, helping it to reduce greenhouse emissions and heavy traffic. Further expansion is set with a new agreement to take over 60 forecourt stores from Avia, building on the existing 16 successful SPAR Express forecourt stores.

SPAR UNITED KINGDOM
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SPAR HUNGARY

SPAR Hungary is a market leader with a total turnover of €917.6 million in 2020, an increase of 8.9% over the previous year using constant average exchange rates. SPAR Hungary added a total of 162 stores to its portfolio which reached 5,506 stores. The full portfolio on January 1, 2020 consisted of 2,105 SPAR Supermarkets, 2,445 SPAR Hypermarkets, and 24 SPAR International hypermarkets, with a total sales area of 491,624 m².

SPAR Hungary is one of the country’s largest employers, with 11,781 team members, of which 8,012 are women. The expansion of SPAR Hungary’s online platform has been substantial, with e-commerce sales volumes increasing by 250%. Sustainability is also high on SPAR Hungary’s agenda, focusing on promoting sustainable packaging solutions, plastic and sugar reduction, and expansion of e-commerce.

RETAIL TURNOVER: €917.6 MILLION

SPAR SLOVENIA

SPAR Slovenia ended 2020 with 126 stores, comprising 115 SPAR Supermarkets and 13 EUROSPAR Supermarkets, with a total sales area of 117,437 m². Sales increased by 6% to €911.3 million. SPAR opened not only new supermarkets but also an INTERSPAR Hypermarket in the Apeji shopping centre in Ljubljana. All new stores have modern architecture, and indoor lighting is applied throughout, with energy-efficient construction techniques allowing to reduce CO₂ emissions. SPAR online sales volumes increased by 195% in 2020, as consumers recognised the advantages of e-commerce during the pandemic.

In 2020, SPAR Slovenia launched the fifth season of its ‘Home of Local!’ to promote the purchase of local goods. Local entrepreneurs were expanded, with products sold under the own brand, ‘The Gardens of Slovenia’.

SPAR SLOVENIA

RETAIL TURNOVER: €911.3 MILLION

SPAR CROATIA

SPAR Croatia celebrated its 15th anniversary in 2020 and ended the year with a portfolio of 198 stores, comprising 112 INTERSPAR hypermarkets and 86 SPAR supermarkets, with a total sales area of 164,251 m². Sales increased by 12.7% to €613.4 million.

SPAR Croatia and SPAR International joint sales in Croatia reached €773 million in 2020, among the highest growth rates in Western Europe and ranks third of the SPAR network.

SPAR Croatia made significant progress in 2020, in achieving its sustainability goals, especially in plastic and food waste reduction, salt and sugar reduction, and the implementation of an industry-acclaimed local sourcing roll-out. Sourcing agreements with local producers and suppliers were expanded, with products sold under the own brand, ‘The Gardens of Croatia’.

SPAR in Croatia runs a campaign called ‘Yes, it’s Local!’ to promote the purchase of local goods. In 2020, SPAR Croatia expanded the SPAR Enjoy online platform to 16 additional stores and SPAR Croatia opened two CENSA Coffee zones under the own brand.

SPAR Croatie

RETAIL TURNOVER: €773 MILLION

SPAR RUSSIA

SPAR Russia is in the process of reorganising the network by closing loss-making supermarkets in the Middle Volga region. The partners with a license to operate the SPAR brand in Russia have worked closely with SPAR International to develop an innovative concept, representing the first use of the concept in Russia. CENSA Coffee zones now feature in 175 SPAR stores in the Middle Volga now.

Throughout 2020, SPAR stores in the Middle Volga utilised SPAR global preferred suppliers, which included equipment, branding, and marketing and distribution.

SPAR Russia continued to focus on e-commerce, as consumers recognised the advantages of e-commerce volumes increasing by 11.8% in 2020, reaching 2.6 million customers.

The country’s private label development programme has shown record results again, having reached 11.3% private label sales, compared to 7.5% in 2019, reflecting the continuous efforts by both SPAR Russia and Partners to develop own brands.

RETAIL TURNOVER: €1.7 BILLION

SPAR POLAND

In 2020, SPAR in Poland focused on the expansion and growth of store numbers with a rolling continuous conversion of former Piotr i Paweł stores to SPAR and EUROSPAR formats. It also strongly supported the growing number of independent SPAR retailers.

The growth in sales to €320.5 million, representing a 12% increase over the previous year, is underpinned by a combination of e-commerce, store development, and a focus on the promotion of own brands.

The growth in sales to €320.5 million, representing a 12% increase over the previous year, reflects the excellent performance of SPAR in Poland, including 272 stores and 115 SPAR and 35 EUROSPAR stores.

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SPAR POLAND

RETAIL TURNOVER: €320.5 MILLION

SPAR GEORGIA

SPAR in Georgia achieved exceptional growth over the last two years. Reaching a total portfolio of 272 stores across the country, SPAR has become one of Georgia’s largest retail chains.

Annual sales reached €110.6 million, representing impressive growth of 24.6% using constant average exchange rates.

Within just one year, SPAR Georgia added 80 stores to the portfolio. Granting sub-licenses to independent retailers has complemented company-owned store growth, improving the mix to include not only company-owned teams but also those of independent retailers.

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SPAR GEORGIA

RETAIL TURNOVER: €110.6 MILLION

CENTRAL & EASTERN EUROPE

1,855 STORES, €6.24 BILLION TOTAL SALES

4.9% GROWTH IN AVERAGE SALES PER M²
An SMS newsletter ensures customers never miss out on the great special offers, instore activities, and product updates. An e-commerce solution is being rolled out, providing even more options for shoppers, embracing the online grocery trend.

SALES INCREASE
26%

SPAR KOSOVO
The four SPAR stores operating in Kosovo generated a retail turnover of €6.2 million in 2020, increasing 119% year-on-year in constant currency exchange rates. The substantial increase in volumes of fresh foods contributed a 39% share of sales. In February 2020, the fourth store opened its doors, bringing the brand to customers in the second largest city, Fushë.

The local retail chain, Meridien Group, has acquired a significant share of SPAR Kosovo, with commitments to expand the SPAR brand further in 2021 through both store conversions and new store developments.

During the pandemic, online retailing was introduced, starting with three differently priced essential grocery boxes, and then rapidly expanding out into a full offer. SPAR customers in the capital embraced the possibility of food delivered on the same day of ordering to their homes and the ease of ordering either on a desktop or mobile device.

In 2020, SPAR Kosovo also provided support to the Red Cross, bringing much needed essential groceries to local families, negatively impacted by the economic impact of COVID-19.

SALES INCREASE
119%

SPAR ARMENIA
Due to the current difficulties as a result of the pandemic, the launch of SPAR in Armenia has been postponed until 2022, in mutual agreement between SPAR International and the licensed operator.

SPAR AZERBAIJAN
SPAR Azerbaijan has continued to serve local communities with a store portfolio comprising large EUROSPAR Supermarkets, SPAR neighbourhood supermarkets, and SPAR Express stores. SPAR Azerbaijan’s 12 stores cover a total sales area of 6,138m² with retail sales reaching €30.2 million.

Azerbaijan’s growing network of SPAR stores brings global best practice to the market, delivering a new offering that meets and exceeds local shoppers’ expectations.

Retail turnover: €30.2 million

SPAR BELARUS
SPAR Belarus operated six stores at the end of 2020, which generated a total turnover of €26.3 million. The retail sales area for the three SPAR and three EUROSPAR Supermarkets totalled 3,591m².

When taking into account constant annual average exchange rates, sales grew by 26%, despite challenging market conditions.

The expansive food-to-go assortment, which includes sushi, soups, salads, and pizza, attracted many new customers. Once instore, the fresh bakery, fish counter, butchery, and fresh produce department complement the grocery selection. Local specialities such as tandoor ovens complete the offer.

SALES INCREASE
32.2%

SPAR ALBANIA
SPAR Albania increased its retail turnover by 6.9% over the previous year to €62.4 million.

To ensure easy access to groceries, SPAR Albania developed a complete e-commerce platform that offers an expansive selection of food and non-food items. The online shopping solution can be accessed through a mobile app, making the ordering process highly user-friendly.

SPAR Albania added another supermarket to its retail store portfolio in the city of Prizren. The 1,030m² SPAR supermarket is run by 20 team members and brings tremendous added value to the city. The company also operated two supermarkets in Tirana in December 2020, bringing total store numbers to 60 stores covering 31,284m². Over 46,000 customers per day shop with SPAR.

SPAR Albania launched a campaign to raise awareness of violence against children and raised funds for those with disabilities through sales of SPAR branded water.

Retail turnover: €62.4 million
AFRICA & THE MIDDLE EAST

1.097 STORES €6.23 BILLION TOTAL SALES
2.8% SALES GROWTH USING CONSTANT ANNUAL AVERAGE EXCHANGE RATES

SPAR SOUTH AFRICA

SPAR South Africa reported retail sales equivalent to €5.2 billion in 2020 using constant annual average exchange rates and reflecting a year-on-year growth of 5.6% in local currency to support its core grocery business. SPAR South Africa operates 886 stores utilising a multi-format strategy with a combined retail sales area of 1,027,072m².

In 2020, a total of 8,042 MWh of energy was generated by solar plants implemented across the group’s distribution centres in South Africa, a prime example of the successful incorporation of sustainable, energy-efficient technologies. SPAR South Africa has shown great community support through various campaigns, including various social media challenges to help people in need. Donations to those in need totalled worth €243.1 million, which were donated under the SPAR’s Shop & Give programme to support various families and organisations.

SPAR South Africa’s SPAR & Give programme honours those who share their time and effort in one year subscription to a classic nursery programme designed to improve maths skills. In this year’s annual SPAR Women’s Challenge series, an iconic road race held virtually for the first time, a total of 30,000 women participated. The entry fee proceeds were donated to support various female-based organisations.

SPAR South Africa continued to champion community activities such as school kitchen gardens and food collection drives, growing widespread support of its values by the local community. For the eighth consecutive year, SPAR South Africa worked with the Mil Poole Foundation to empower young South Africans through Jump Start, a successful work readiness programme designed to improve maths skills. As a responsible retailer, SPAR Namibia supports local community initiatives and national programmes designed to improve maths skills.

SPAR Botswana

SPAR Botswana operates 35 SPAR and SUPERSPAR stores, with a retail footprint of 34,695m². All stores are operated by independent retailers under licence to SPAR Botswana Group Ltd Southern Africa. All stores have access to the SPAR training academy.

The combination of SPAR neighbourhood stores (smaller, more urban SPAR stores) and larger format SPAR Supermarkets (predominantly in rural areas) generated annual turnover of €503 million in 2020. This growth was achieved through consolidating the SPAR Botswana to open Click-and-collect services, ensuring all shoppers could access groceries safely. The MG Lifestyle loyalty programme, first launched five years ago, boosted customer brand awareness.

SPAR Botswana has an extensive offer of own brand products and spreads a further support through various campaigns, including modern refrigeration technologies and LED lighting. SPAR Botswana’s focus on combining sustainability and consumer-driven programmes ensures customers enjoy an unrivalled shopping experience. All departments offer excellent customer service and instore assistance, with the instore butcheries and bakeries catering to diverse shopper needs.

As a responsible retailer, SPAR Namibia supports local community initiatives and national programmes designed to improve maths skills. As a responsible retailer, SPAR South Africa supports local community initiatives and national programmes designed to improve maths skills.

SPAR Mozambique

SPAR Mozambique’s major independent retail partner opened a new supermarket in Maputo, supported by SPAR Mozambique’s commitment to its local partners. The SPAR Mozambique/SPAR & Give programme has been integrated throughout the store, including modern refrigeration technologies and LED lighting. SPAR Mozambique’s focus on combining sustainability and consumer-driven programmes ensures customers enjoy an unrivalled shopping experience. All departments offer excellent customer service and instore assistance, with the instore butcheries and bakeries catering to diverse shopper needs. A strong selection of SPAR Own Brand products sourced through SPAR South Africa are sourced from the local suppliers.

SPAR Nigeria

SPAR Nigeria, a division of 1-Art Group, ended 2020 with 14 hypermarkets covering a retail sales area of 25,000m². SPAR Nigeria generated retail sales in 2020 of €126.2 million, representing a flat year in constant local currency terms. Total annual turnover of €126.2 million included the local catering and hospitality market. SPAR Nigeria has shown great community support through various campaigns, including modern refrigeration technologies and LED lighting. SPAR Nigeria is building customer loyalty through the targeted use of a rewards app and gift cards.

After the closure of this SPAR Hypermarket in Lekki in October, the store was rebuilt with support of local volunteers from the local community, demonstrating SPAR Nigeria’s strong connection to its community.

TOTAL SALES AREA 47,545m²

SPAR International Annual Review 2020
SPAR ZAMBIA

In 2020, SPAR Zambia reported a retail turnover of €6.5 million from four SPAR Supermarkets with a combined retail sales area of 992m². The seven SPAR Supermarkets in Malawi achieved a total turnover of €6.5 million from 20 stores with a combined retail sales area of 31,985m².

SPAR SAUDI ARABIA

SPAR Saudi Arabia opened two new SPAR stores in 2020, closing the year with a total of 11 SPAR stores and growing its total retail turnover by 34.1%. The new stores helped compensate for a reduction in trade made by the temporary closure of the successful SPAR outlets at universities campuses due to the pandemic.

SPAR QATAR

The total retail sales of SPAR Qatar in 2020 grew by 37% to a constant currency value of €7.6 million from 12 stores with a combined retail sales area of 12,331m². The newly opened stores are mainly located in the country’s capital city Doha. The stores cater to a diverse customer base, including single households, families, office workers, and students.

SALES INCREASE 25%

SALES AREA GROWTH 34.5%

SALES INCREASE 5.5%

SALES AREA GROWTH 34.5%

SALES AREA GROWTH 82.5%
SPAR CHINA

SPAR China recorded retail sales of €1.25 billion and fell by 7% in local currency. SPAR has a significant and widespread presence in China, with 360 stores comprising 177-270m² of retail space across seven provinces. The 36 Pieri partners in China operate featuring self-service store fittings and digital services. New store openings included the launch of the first SPAR China’s first independent retailer operated store.

Despite COVID-19 restrictions, SPAR China grew its presence through an active development of a multi-format strategy ranging from large scale hypermarkets to lifestyle convenience stores comprising 801,705m² of retail space and widespread presence in China, with 360 stores featuring state-of-the-art store fittings and digital services. New store openings included the launch of the first SPAR China’s first independent retailer operated store.

The early introduction of COVID-19 restrictions led to renewed emphasis on digital, online retailing and customer loyalty programmes. Strong supply chain strategies which efficiently support order online fulfillment in cooperation with on-demand delivery.

A pilot trial using solar panels at the Kalubowila Academy, and bring a modern, high-quality shopping experience to the customer.

The three SPAR Pakistan supermarkets operating in Karachi and Faisalabad generated a total turnover of €6.0 million in 2020, an increase of 38% year on year in constant annual average exchange rates. The increase reflects the full year of trading of the third store which opened at the end of 2019.

SPAR INDIA

SPAR India highly developed e-commerce platform has ensured customers could continue to source their grocery needs even when shopping malls were closed. The demand for home delivery grew over previous years.

The online grocery platform reflects the complete offer available.

SPAR SRI LANKA

SPAR Sri Lanka recorded retail turnover of €9.9 million in 2020, an increase of 16.5%, with proximity and neighbourhood stores during 2021. SPAR Sri Lanka’s sustainability efforts include a reduction in the use of plastic and offering locally sourced products to customers.

Customers have embraced the growing e-commerce platform and increased sales and orders from the third store which opened at the end of 2019.

SPAR AUSTRALIA

SPAR Australia produced revenue growth of 10.5%, with proximity and neighborhood retailing again proving popular with local consumers. Five new SPAR stores opened in Queensland and New South Wales. New store openings included the country’s first SPAR (non-SPAR) store, a larger supermarket format to meet weekly family shopping needs. The supermarket of 121 SPAR stores achieved a retail turnover of €22.2 million on a total sales area of 248,719m².

SPAR Cow Brand development continued to gain pace with 25 new products launched during 2020. SPAR Australia’s fresh departments promote the international ‘Better Choices’ campaign, highlighting the many healthy food options.

In 2020, 33 stores completed works through the Store Development Fund, completed projects ranged from refurbishment to new departments and stores rollouts.

SPAR INDIA

COVID-19 restrictions caused the temporary closure of large-scale hypermarkets in India for much of the year, impacting SPAR’s retail turnover in the country. At the year end, sales had declined by 58.6% to a total of €17.6 million in constant annual average exchange rates.

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SPAR India highly developed e-commerce platform has ensured customers could continue to source their grocery needs even when shopping malls were closed. The demand for home delivery grew over previous years.

An increased focus on health and well-being has led to growth in fresh produce sales and products targeting different dietary needs and supporting healthy lifestyles.

SALES AREA: 101,224m²

SALES INCREASE: 11.54%
COVID-19 RESPONSE

"COVID-19 has presented adversity and uncertainty across the globe. It has also highlighted the importance of togetherness and collaboration – attributes that lie at the heart of the global SPAR network."

Tobias Wasmuht, Managing Director, SPAR International

At the start of the pandemic, SPAR created a global COVID-19 emergency response network across four continents. Taking learnings from our partners in countries first affected by the virus, including China and Italy, this network has continued to work together to share practical tools and responses worldwide to support the implementation of crucial practices.

More than ever before, SPAR’s 410,000 team members have sought to support their neighbours and communities through testing and uncharted ways of buying better together.

Although the COVID-19 pandemic has presented challenges and uncertainty across the globe, it has also highlighted the resilience and genuine sense of solidarity and collaboration that is at the heart of the global SPAR network.

We thank all of our SPAR team members across the globe, across all aspects of the organisation, for their exemplary dedication to saving our customers and playing a pivotal role in their communities during testing and unchartered circumstances.

Beyond ensuring access to essential groceries in a safe and convenient shopping environment, SPAR team members have sought to support those most affected by the pandemic through charitable donations, volunteer shopping services, grocery aid boxes, and various community outreach schemes.

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2016 - 2020 HIGHLIGHTS

GLOBAL SALES IN BILLION EURO

<table>
<thead>
<tr>
<th>Year</th>
<th>Sales (€m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>39.8</td>
</tr>
<tr>
<td>2019</td>
<td>37.1</td>
</tr>
<tr>
<td>2018</td>
<td>35.8</td>
</tr>
<tr>
<td>2017</td>
<td>34.5</td>
</tr>
<tr>
<td>2016</td>
<td>33.1</td>
</tr>
</tbody>
</table>

GLOBAL STORES

- €7.8 BN
- GLOBAL GROWTH
- FROM €32 BN TO €39.8 BN IN CONSTANT CURRENCY TERMS OVER THE LAST 5 YEARS
- A GROWTH OF 24.54%
- A CAGR OF 5.64% OVER 5 YEARS

REGIONAL GROWTH OVER THE 5 YEAR PERIOD

- CENTRAL & EASTERN EUROPE
  - +€2BN
  - +46.2%
  - CAGR 9.96%
- WESTERN EUROPE
  - +€4.8BN
  - +23.2%
  - CAGR 5.53%
- AFRICA & MIDDLE EAST
  - +€1.3BN
  - +27.1%
  - CAGR 6.17%

LOCAL GROWTH EXAMPLES OVER THE 5 YEAR PERIOD

- CROATIA - +108.9% 36.3% CAGR 18.2%
- HUNGARY - +91.5% 43.8% CAGR 13.1%
- ITALY - +64.1% 31.6% CAGR 11.1%
- SPAIN - +39.9% 32.3% CAGR 9.6%
- SWITZERLAND - +23.7% 77.6%
- UKRAINE - +23.2% 77.6%
- BELARUS - +21.7% 77.6%
- CAMEROON - +20.7% 77.6%
- SRI LANKA - +20.4% 77.6%
- MALTA - +19.9% 77.6%
- MALAWI - +19.8% 77.6%
- PAKISTAN - +19.6% 77.6%
- ZAMBIA - +19.5% 77.6%
- USA - +19.4% 77.6%

FASTEST LOCAL GROWTH OVER THE 5 YEAR PERIOD

- AUSTRIA - +15.0% 14.7%
- PORTUGAL - +15.1% 14.7%
- SPAIN - +15.2% 14.7%
- SWITZERLAND - +15.3% 14.7%
- UKRAINE - +15.4% 14.7%
- BELARUS - +15.5% 14.7%
- CAMEROON - +15.6% 14.7%
- SRI LANKA - +15.7% 14.7%
- MALTA - +15.8% 14.7%
- MALAWI - +15.9% 14.7%
- PAKISTAN - +16.0% 14.7%
- ZAMBIA - +16.1% 14.7%
- USA - +16.2% 14.7%

Featured are some of the cumulative growth figures of SPAR partners during the last 5 years of the SPAR better together strategy.

GLOBAL STORES 2020

- 13,501
- 2020
- 13,501
- 2019
- 13,183
- 2018
- 12,777
- 2017
- 12,345
- 2016
- 12,277
- 2015