



Department
of Energy &
Climate Change

DECC Non - domestic building energy use project phase I

Annex 4: Profile of Large Retail Chains

June 2013

Profile of Large Retail Chains

Table 1 below summarises how large retailers are split between activity sectors:

Table 1: Number of Stores Operated by Large Chain Retailers with 100+ Outlets, Split by Activity Sector

Activity Sector	Definition – Thompson Categories	Number of stores operated by large chain retailers with 100+ sites
Butchers	Butchers	0
Bakers	Bakers	1,474
Supermarkets	Supermarkets	9,349
Freezer centres	Freezer centres	148 ¹
Newsagents	Newsagents	886
Other mixed food retail	Confectionary retailers, corner shops, delicatessens, farm shops, fishmongers, general stores, greengrocers, grocers, health food products, herbs and spices, organic food, shell fish	7,222
Total		18,265

While developing the methodology and during the comparison stage of the project we identified that some of the convenience and supermarket stores belonging to what we thought were chain

¹ Not including Iceland which didn't appear in the sample based on Thompson codes, but does appear in Supermarkets rather than Freezer Centres. The quantity of stores has since been added to Supermarkets.

retailers are actually a special type of franchise called a ‘symbol’ group². Within these retailers the energy management of the store remains in the control of the store owner; they retain their independence, with no dictation on behaviours from a central source. We had previously decided that because these stores would operate similarly to other independent stores they should be excluded from our sample of large retailers, but during the main stage of the project we identified others and opted to extend this approach.

Excluding symbol groups³ (some of which will have emerged and been interviewed within the small / medium chains quotas⁴), we were aware of a number of food and mixed retailers operating more than 100 premises in the UK:

Table 2: Stores Operated by Individual Large Chain Retailers with 100+ Outlets

Company name
Aldi Stores Ltd
Asda Stores Ltd
Bp Express Shopping Ltd
Coopland & Son Bakers (Scarborough) Ltd
Greggs Plc
Heron Frozen Foods Ltd
Holland & Barrett Retail Ltd

² Such as Londis and Costcutter. A form of franchise, symbol groups do not own or operate stores, but act instead as suppliers to independent grocers and small supermarkets, producing pseudo-chain stores which trade under a common banner. Symbol groups provide fascias, branding and business support to individual convenience store retailers for an annual fee. Unlike other forms of franchise, symbol groups have developed primarily by selling their services to existing stores, rather than by actively developing new retail outlets.

³ Still including retailers like Spar who operate some stores centrally and some as franchises.

⁴ The symbol group stores appear to behave like independent and small / medium chain retailers of the same type

Company name
Ipswich & Norwich Cooperative Society Ltd ⁵
Lidl UK GMBH
Martin McColl Ltd
Oxford Swindon And Gloucester Co-Operative Society Ltd
Sainsburys Supermarkets Ltd
Smith News
Southern Co-Operatives Ltd
Spar
Tesco Stores Ltd
Thorntons Plc
Waitrose Ltd
WM Morrison Supermarkets Plc

Source: Experian

In addition to the food and mixed retailers in the table above, we also identified other large chain food retailers that weren't captured based on their Experian pH ID⁶. After confirming these were within the scope of the work, we proceeded to include them in our sample.

⁵ Co-operative societies only appeared in the pH large retailer data if they had more than 100 stores within that regional society, with other regional societies not appearing here. For the purposes of this project all Cooperative Food outlets were treated as a single entity, covering all 3,300 food retail stores they operate collectively.

⁶ Such as frozen food retailers like Iceland and Farmfoods, and sandwich retailers.

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