

## Mapping analysis of the food retail market in East Asia: findings from a business database analysis

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# Background

**Aim: To provide an overview of the food retail sector in selected countries the East-Asia region and identify key food retail trends.**

China, Indonesia, Malaysia, Philippines, Thailand and Vietnam

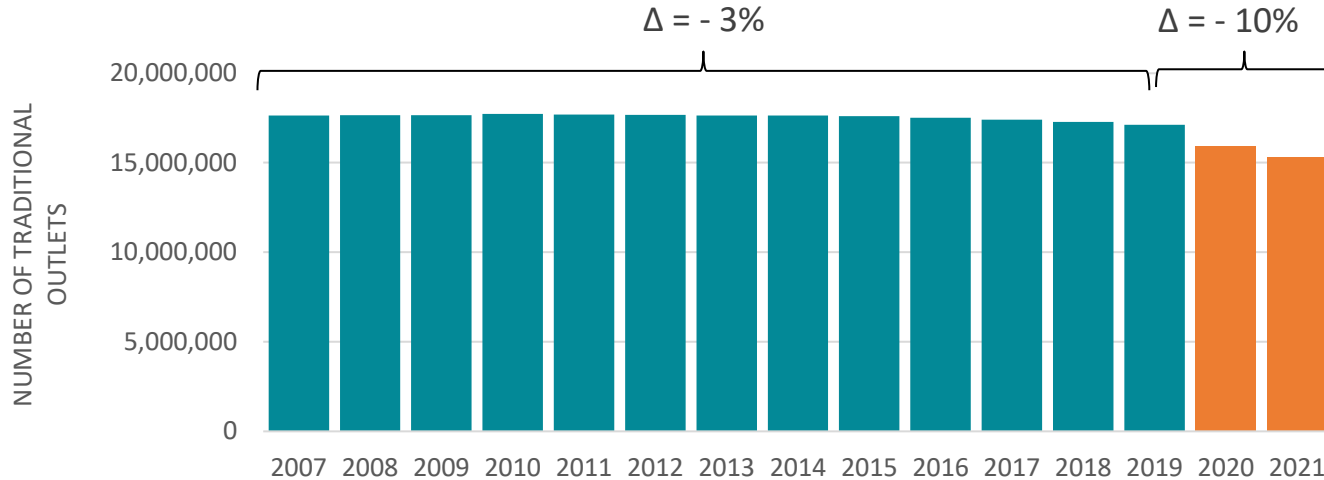
**Data from the past 14 years (2007-2021)**



# Trends in the grocery sector

## Less traditional retailers and more “modern” retailers

Continuous shrinkage on the number of outlets, selling space and revenue of individual/family-owned food stores.



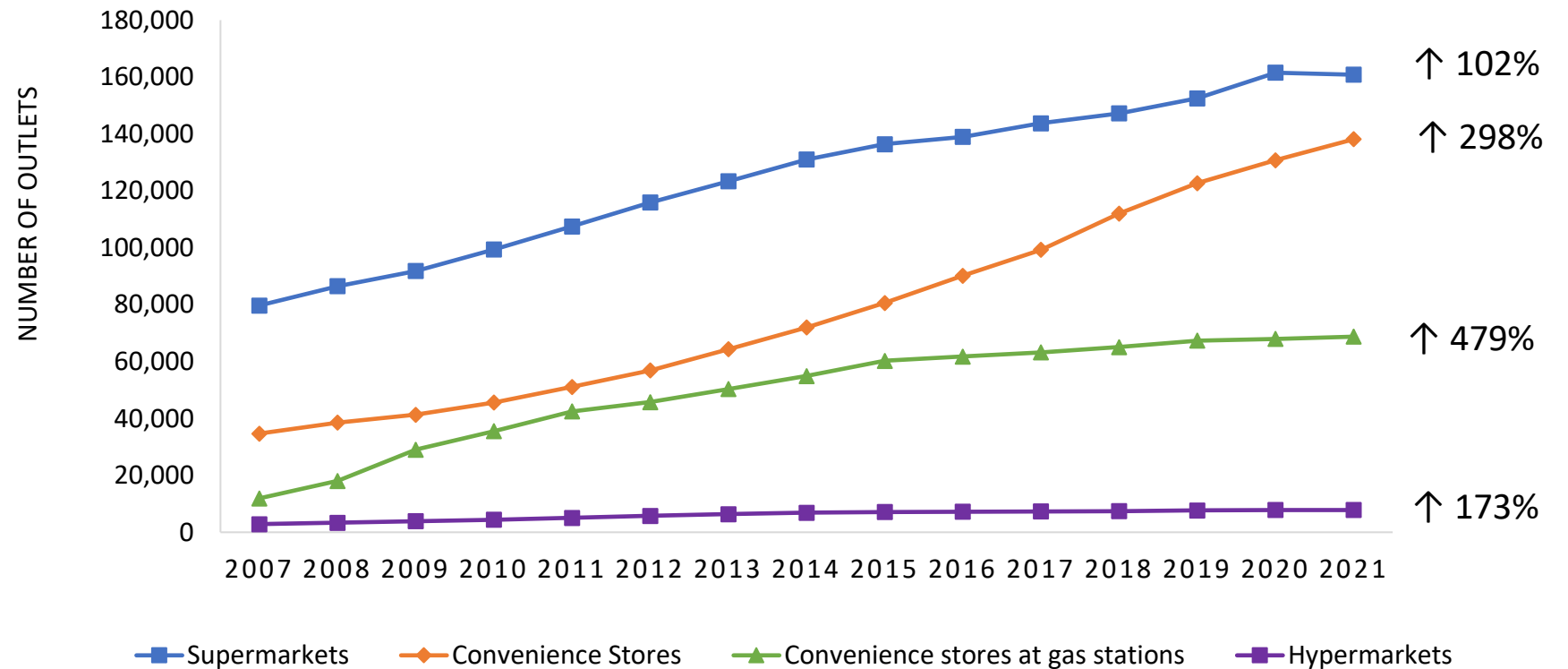
COVID-19: More than 1 million TRADITIONAL outlets ended their business between 2020-2021

# Trends in the grocery sector

## Less traditional retailers and more “modern” retailers

In the past fourteen years, the overall number of **convenience stores** and **supermarkets** increased by around **300%** and **100%**, respectively in these selected countries

### Growth on modern retail outlets







# Trends in the grocery sector

## Highly concentrated market

In many countries, a **few local players** hold a **significant share** of the **convenience store** market.

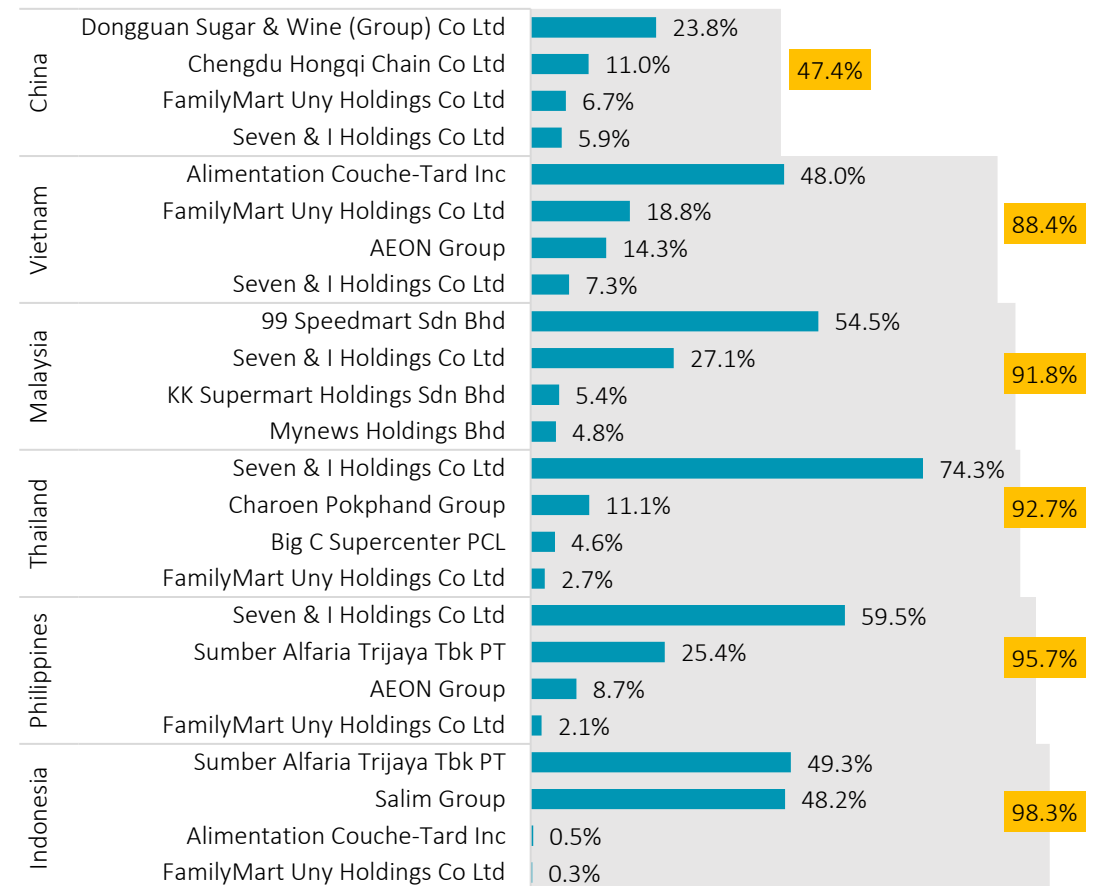
Leading food retail companies have the **power to shape** food systems.

**Large chains** have significant potential to **create healthy changes** impacting huge numbers of people



Major players should be the focus on actions to promote changes towards healthier retail food environments

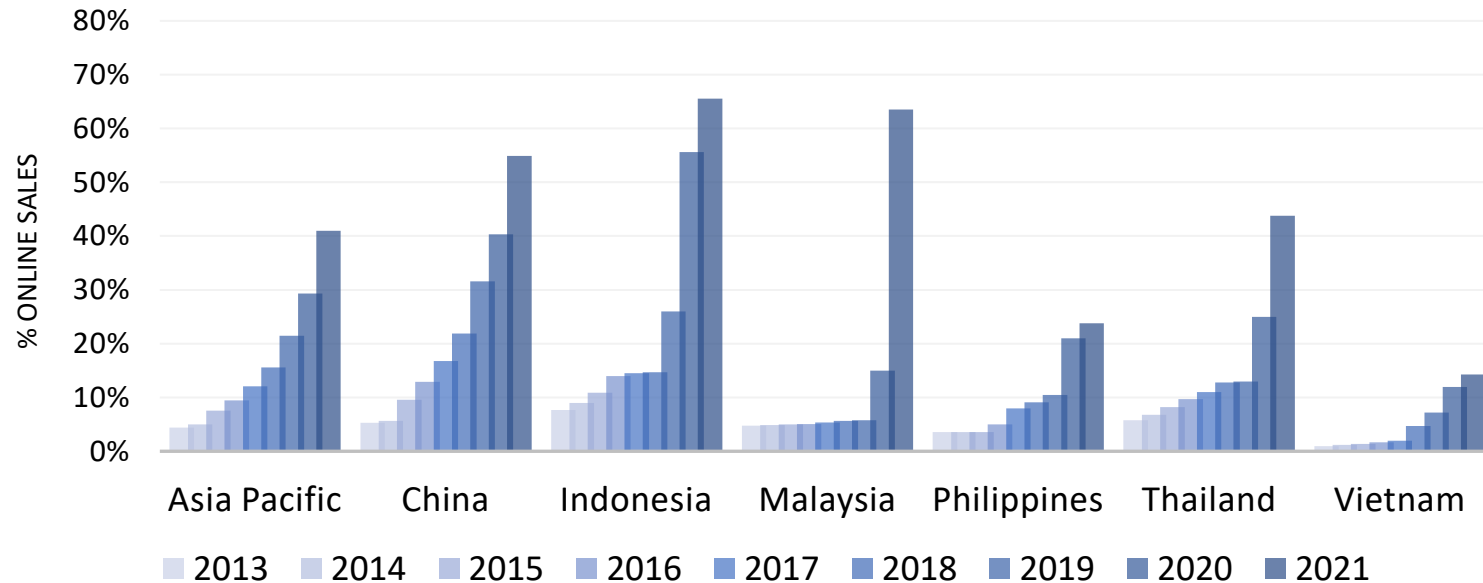
## Top four leading retail companies for convenience stores, % of their market share in 2021 and concentration ratio



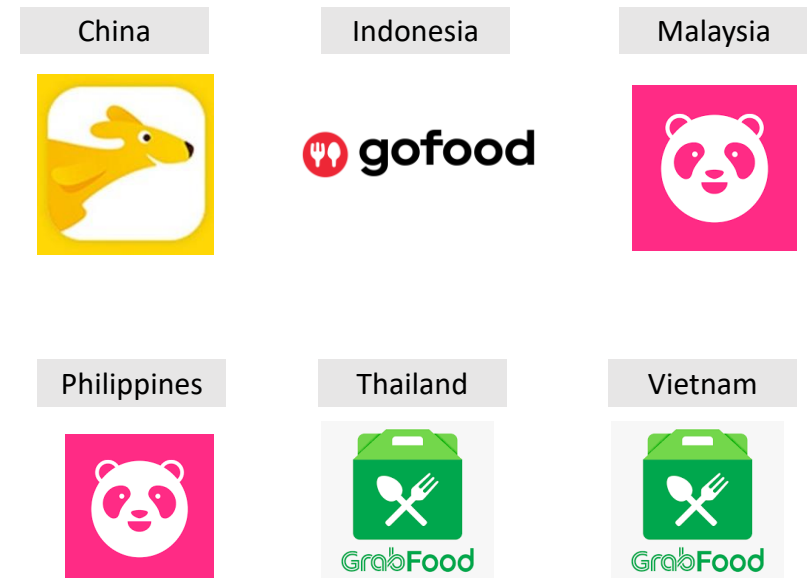
# Trends in the grocery sector

## The rise of food delivery apps is changing the way people access fast-food meals

In 2013, only 6% of sales from fast food and takeaway restaurants were on-line. By 2021, on-line sales of these items had risen to 41% and some countries saw even greater increases.



### Most used food delivery apps used in 2021



# Conclusions

- The food retail sector in East Asia is continuing to rapidly change.
- Analysis of datasets monitoring trends in the sector is critical to understand implications for the healthiness of children's diets.
- **Timely** opportunity to guide the development of healthy food retail in EAP.





# Thank you

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