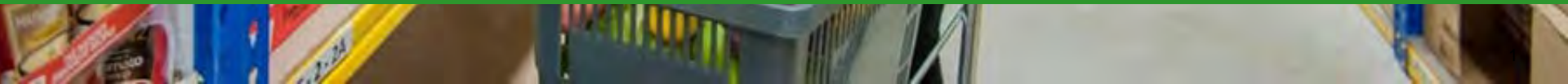




Anytime, Anywhere Retail

Oct, 2021

Ronald Roda

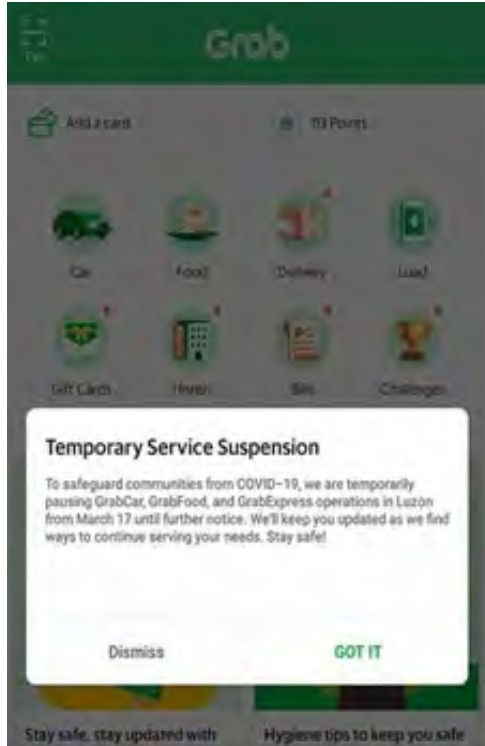


Topic for discussion today

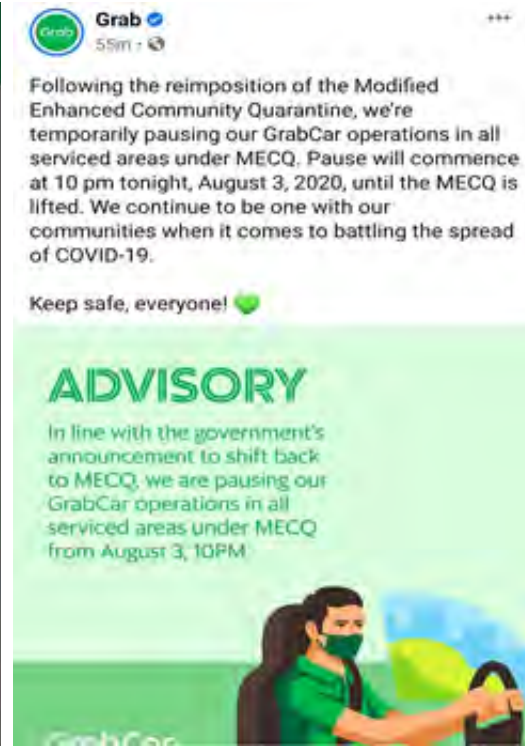
- **Aytime, Anywhere Digital Retail**
 - Learnings at GrabPH
 - **Opportunities** in retail to target
 - Harnessing your **Ecosystem** e.g. driver entrepreneurs

In March, 2020 the Covid crisis came and impacted our transport business negatively for the balance of the year...

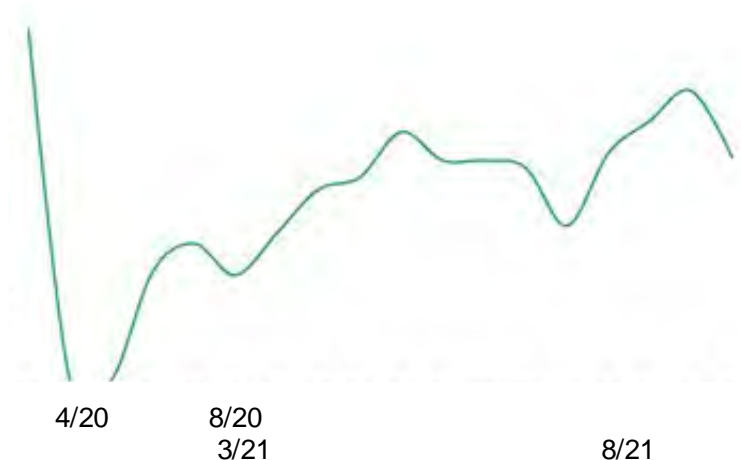
March, 2020



Aug, 2020



PH Grabcar impacted by lockdowns



Illustrative Graph Only

Fast forward 1+ years, and we are now a far bigger, more resilient business, and fundamentally different from what we were

GrabShare

GrabForGood

GrabTaxi

GrabTrike

GrabRewards

GrabCar

GrabExpress

GrabFood

GrabMart

GrabPay

GrabFresh

GrabGifts

GrabAds

GrabKitchen

GrabforBusiness



How did we transform from GrabPH?

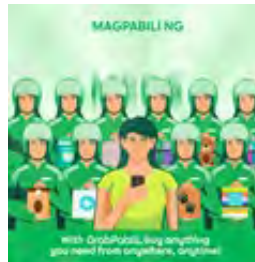
We redefined “mobility” and went into “anything, anytime, any reason delivery”

2013 -18: Transport Centric



“ Delivering people safely and conveniently from A to B”

2018-2020: Deliveries+ Centric



“ Delivering Food fast and convenient from resto to your home”

2021: Retail Centric?



“ Anything, anytime, any reason delivery”

Resilience: GrabMart (marketplace) was launched in the middle of - and in reaction to, the pandemic in 2020

Any thing, any time, any reason GrabMart is there for you

Big Box: More stores, more SKUs



- Onboarded aggregator-exclusive retailers: **SM, Robinsons, Metro, and Ever**
- Consistently growing number of branches and expanding SKU portfolio with current partners

CVS: More hours for you to shop



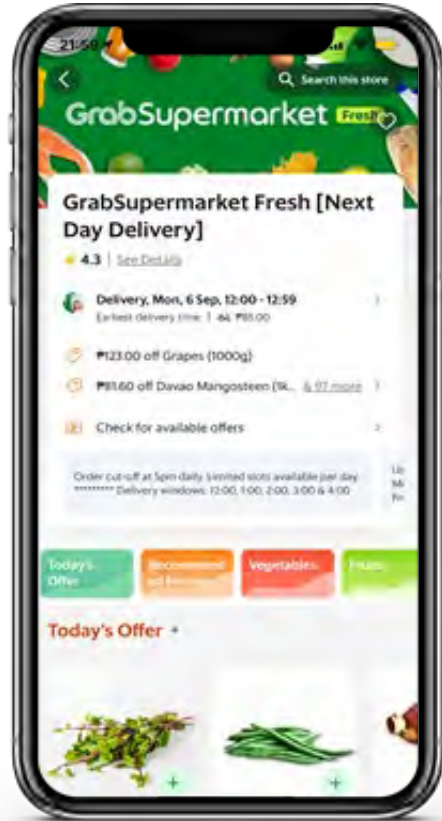
- Separating out the Convenience Store use case (i.e. odd hours, lower basket size) to highlight “Any” promise
- 24/7 Campaign managed to drive growth to stagnating CVS segment

Specialty: More choices/categories

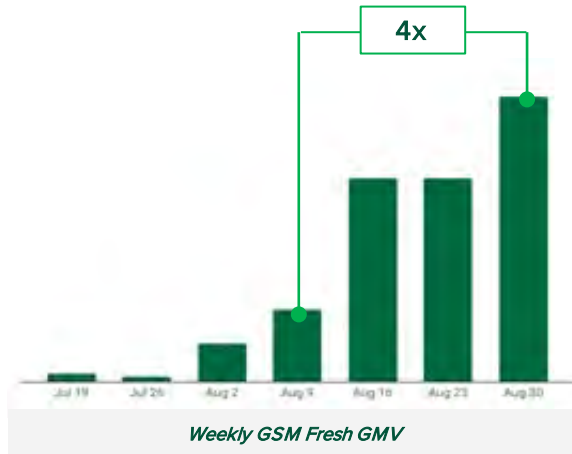


- (Coming Soon) Expanding category coverage of GrabMart to include popular gift and holiday items for the upcoming Xmas Season in the Philippines

Opportunity: Aggregating entrepreneur farmers & suppliers, providing the ability of greater reach with Grab infrastructure



4x GMV growth since GSM Fresh soft launch



Successful Grab Supermarket Fresh (GSM Fresh) Pilot in July 2021

Just-in-time Fresh Supermarket Model

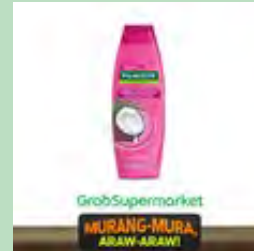
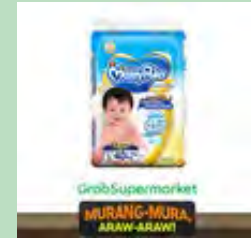
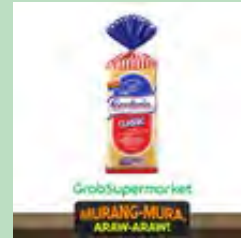


Key Enablers: Warehouse Facility, Purchasing and Category Operations, Warehouse Operations (3PL), Inventory Management System

Opportunity: Serve thousands of our delivery partners with affordable groceries



6000+ SKUs



From 350+ FRESH SKUs to “Anything Everything” 6,000+ SKUs in Q4
FREE DELIVERY EVERYDAY

My learnings on retail

Organization and Workflows

Infrastructure

Maximizing Resources

- Rechanneling existing Business Development, Marketing, Marketplace teams, Customer support
- Reused flows for customer service, and driver allocations

- Delivery Tech: Batching and scheduled orders
- SMS & Telesales automation
- Existing driver center meeting rooms converted to grocery facilities

Building Resources

- New team: Category management, Sourcing, Warehousing operations
- Processes: Just in time purchasing and inventory processes

- Opening dispatch centers
- Cold storage handling
- Inventory Management System
- Picking and packing automation

Some Key takeaways

- **Be resilient**: Challenges and crisis will always come
- **Opportunities** are borne out of difficulties
- **Keep your stakeholders in mind** e.g. *driver entrepreneurs*
- Your **impact** is bigger than what you think e.g. *farmer entrepreneurs*

If you have any ideas on helping entrepreneurs, pls sync up with us: Ronald.Roda@grab.com