

**| ACT FAST!**

WANZL solutions for success in quick commerce



# | WITH TOMORROW IN MIND

Detect megatrends – discern the future

■ **Urbanisation and regionalisation, digitalisation and automation:** these are development trends that link our present with the future. Other key topics: the individual's need to stand out from the crowd while also merging into it. And, of course: convenience as a life principle!

Amid these developments, major cities and metropolises – as the preferred living environments – are driving the trend towards small shop units and online purchases.

This is due to the typical characteristics of conurbations: lack of space and the constant threat of traffic gridlocks. Digitalisation and automation provide the necessary hardware and software to ensure the speeds required for processing transactions. At the same time, they act as drivers for new sales concepts and channels, thus revealing the infrastructures of the future.

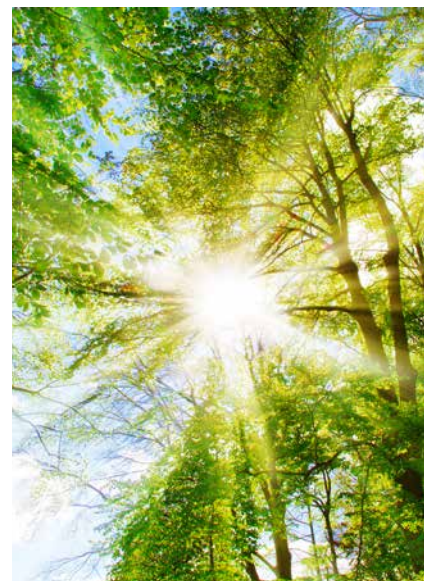
→ **IN THE FAST-MOVING RETAIL SECTOR** megatrends can provide orientation. The same applies here: Life punishes those who delay.

↓ **THE INTERFACES** between the physical and digital world dominate: this can make all the difference in online retail.





↓ **MEGATRENDS**  
determine the business models of tomorrow.



↑ **CONVENIENCE:**  
find the right products for the distribution channel

↑↑ **SUSTAINABILITY MEGATREND:**  
for our earth's sake

← **URBANISATION MEGATREND:**  
conurbations as a key challenge



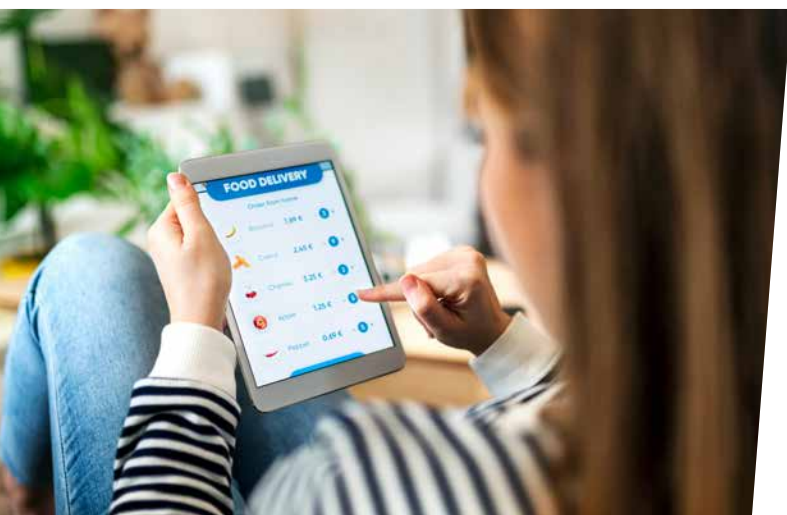
*// Shoppers make quick commerce purchases mainly to save time and because it is convenient. Spontaneity also plays a major role //*

## | FASTER PRESENCE

### Quick commerce as a trendsetter

■ **Where the development of sales in the online food retail** was only modest before the 2020s, the consequences of the coronavirus pandemic have recently boosted sales considerably. In 2021, consumers in Germany spent more than 3.9 billion euros online on their foodshopping requirements – almost fifty percent more than in the previous year!

As an alternative to shopping baskets piled high for the weekly shop, more and more providers in the quick commerce sector are emerging on the market. Their advantage over “traditional” online retail: they deliver your goods within a few minutes to a few hours from the time of order. Shoppers make quick commerce purchases mainly to save time and because it is convenient. Spontaneity also plays a major role. For example, missing vital cooking or baking ingredients can be ordered from the comfort of your kitchen.





## Development of food delivery services in selected countries

### Sales in online food retail

Billion euros

DE *	EN **	FR ***
3.92	24.63	9.9

### Growth rate of online food retail compared to the previous year

DE	EN	FR
+47%	+6.2%	+46.5%

### Share of online food retail in total online sales of goods

DE	EN	FR
4%	13%	7.8%

### People who have ordered food online once before

DE	EN	FR
36%	30%	41.4%

### Share of online food retail in total food sales

DE	EN	FR
1.95%	13%	10%

\* KPMG: Retail Sales Monitor 1/2022 Developments in German retail. Focus: quick commerce

\*\* Savills, UK: Spotlight - Aug 2021: UK Retail Outlook Report, statista.com: Key Figures of E-Commerce

\*\*\* Fevad.com | Nielsen | Plus vite, plus haut : la livraison alimentaire à domicile se renforce encore en 2022

# | FOCUS ON E-FOOD

## Micro-hubs for quick commerce

■ **Studies have shown** that many consumers see quick commerce as a trendsetter – especially when it comes to buying fresh goods and products from a limited range.

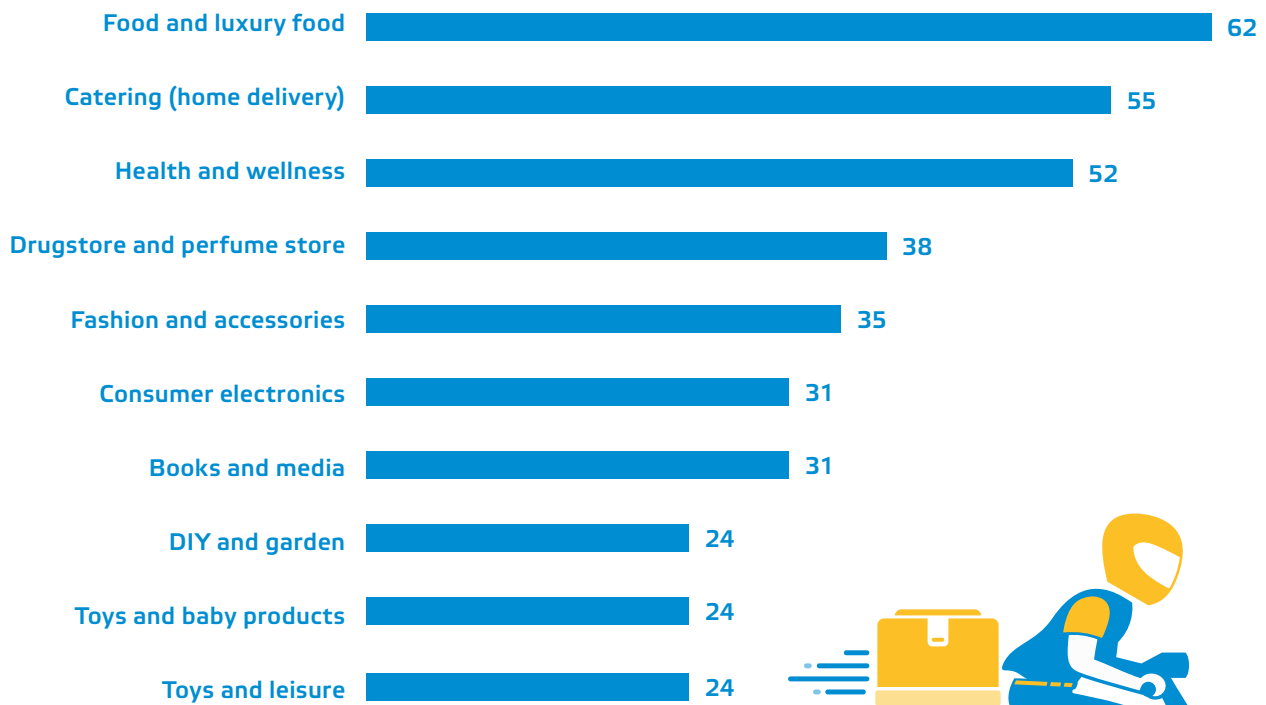
They believe that the food and luxury food sector and the catering sector have particular development potential. According to the interviewees, products from the health and wellness sector also have development potential.

Everyday change in food retail: in addition to traditional sales, three generations of e-food concepts have now

established themselves in parallel. The starting point for the first two concepts is the broad supermarket range, which is usually delivered to customers from a central warehouse in a transporter with delivery times of 1–3 days as an alternative to the weekly shop.

In line with increasing customer needs for speed & convenience, the quick commerce concept differs from this in key aspects in that mainly fresh and niche goods are supplied. Instead of central storage facilities, local logistics units, so-called micro-hubs, are used to deliver to (single) households, preferably on two wheels.

## Suitability of different product ranges for quick commerce\*



Shares as a percentage

\* EHI white paper 2022: Quick Commerce – micro-hubs as last-mile game changers?

# Overview of changed requirements and needs in food retail\*

Traditional food retail > 1st generation E-FOOD > 2nd generation E-FOOD > 3rd generation QUICKCOMMERCE



Self service



Delivery within 2-3 days



Delivery on the same or following day



Delivery in less than an hour



Unrestricted product selection



Supermarket range



Supermarket range  
Focus on organic & regional products



Small range,  
less than an hour



Own transport



Delivery via transporter



Delivery via transporter



Delivery by bike or scooter



Megastore/hypermarket/self-service department store



Central warehouse



Central warehouse with Hub & Spoke or regional warehouse



Local warehouses or stores



Weekly shop for family household



Single household



Focus on price



Focus on speed and convenience

\* KPMG: Retail Sales Monitor 1/2022 Developments in German retail. Focus: quick commerce

# WANZL – EQUIPMENT PARTNER PAR EXCELLENCE

The micro-hub as the dominant storage unit in quick commerce

Mobile office units



Smart wearables



Order picking trolleys



Cooling systems



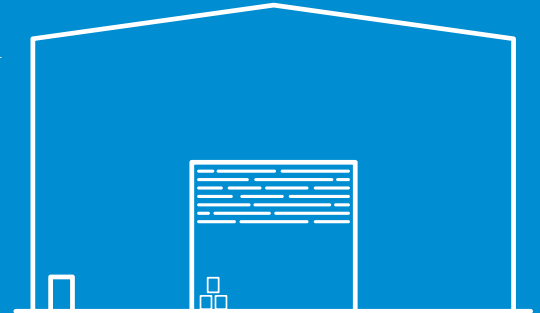
Shelving systems



- 2D and 3D planning
- Project management
- Optionally also as general contractor



- Supplier management
- Bundling of goods/collective delivery



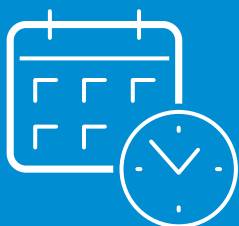
- Inventory management
- Logistics (packaging and delivery)

and more . . .

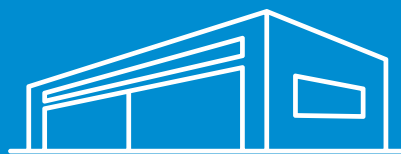


■ **Modular** cooling, shelving and trolley transport systems, plus mobile terminals for comprehensive digital connections to goods transport: WANZL offers you a full range of equipment for your micro-hub.

We will be pleased to share our many years of experience and expertise with you! Together we will discuss the technical and spatial, economic and environmental details with you and translate all these aspects into a functionally and cost-efficient overall solution.



Appointments for rental and opening of a MICRO-HUB based on customer specifications



MICRO-HUB 1

*Your benefits – at a glance*

- Comprehensive equipment of your micro-hub
- From planning to assembly
- Module-based systems
- Provision of services and maintenance



Assembly  
· Maintenance and services



MICRO-HUB 2



MICRO-HUB 3



MICRO-HUB 1

# MAKE IT EASY!

WANZL creates new time and space

■ **The use of state-of-the-art micro-hubs positioned close to the customer** is a necessary prerequisite for successful quick commerce operations. This is because what applies to customer traffic patterns in the store also applies in many cases to the operation of micro-hubs: best possible overview and easy-to-find stored products, combined with fast, unhindered access to goods and largely digital delivery processing.



#### ↑ TRANSPORT SOLUTIONS

The MultiPick trolley from WANZL is ideal for use in small spaces. Its design makes it possible to execute up to six orders per load. In particular, it impresses with its manoeuvrability, which allows users to turn it 360° on the spot.

#### → COOLING SYSTEMS

WANZL cooling systems provide quick commerce providers with flexible solutions tailored to the space available in their micro-hubs. Thanks to their integrated refrigeration circuit, the furniture elements can be flexibly configured, are quickly implemented and operated in a thoroughly economical and climate-friendly manner.



// Your benefits – at a glance //

- Tailored quick commerce solutions
- Mobile products
- Digital connection to other devices
- Applications that save time and effort

→ ROLL CAGES

WANZL roll cages are needed when high-volume and heavy (up to 500 kg) individual orders have to be moved.



↑ SMART WEARABLES

In quick commerce in particular, any speed gains are worth their weight in gold. Wearables with integrated barcode scanners transfer data to end terminals without the user having to intervene!

← MOBILE OFFICE UNITS

Hardware set up in fixed places ties staff to these places thus increasing walking distances. With WANZL's mobile offices, work can be carried out anywhere in the warehouse. This saves valuable time.

↓ SHELVING SOLUTIONS

WANZL offers shelving solutions that are specifically tailored to the needs of micro-hub operators. Simple and flexibly assembled wire constructions provide users with the best possible transparency at all times and also offer excellent fire protection.







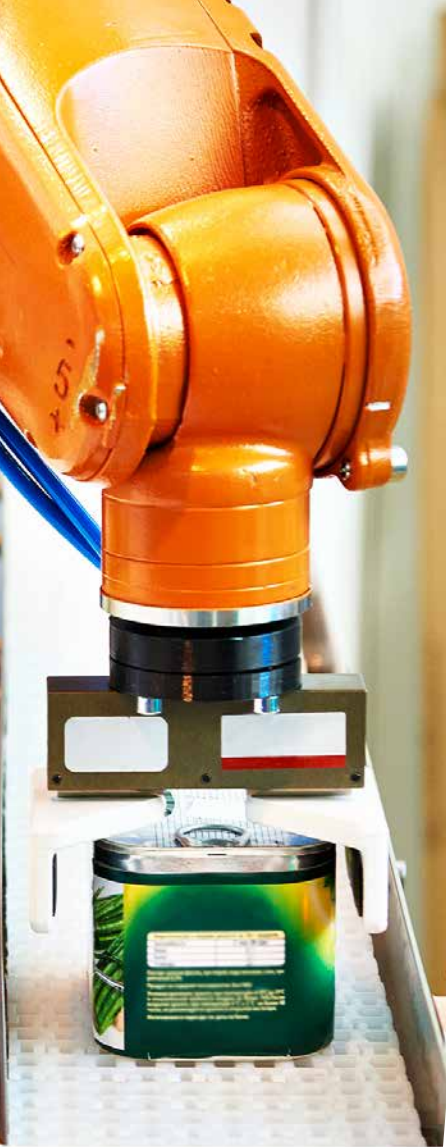
*// Automation wherever possible is the motto of every quick commerce operator //*

## | AUTOMATIC PLEASE!

Save on staff and speed up processes with WANZL.

■ **“Automation wherever possible”** – is the indisputable motto of every quick commerce operator. Only by reducing or maximising the speed of process steps can the margins for long-term successful “turbo retail” be achieved. WANZL has put together a whole range of measures to achieve this goal. This allows semi-automated picking, dispensing and payment solutions to be easily integrated into a micro-hub. In addition, the use of micro-hubs as collection stations or for click & collect services can generate additional revenue – without the need for staff to pick goods!

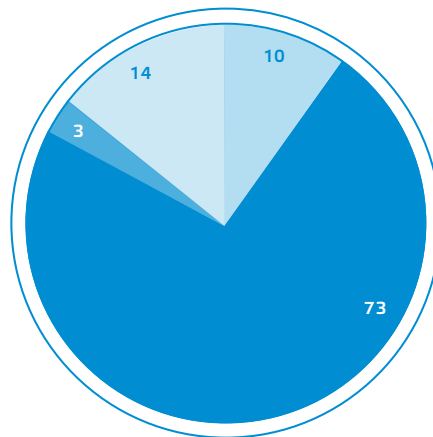




← **QUICK COMMERCE:**  
Automation as the driver –  
driven by automation

↑ **DRIVERLESS DELIVERIES:**  
Still pie in the sky, but perhaps already  
tomorrow's solution.

## Automation of micro-hubs in the future\*



- The throughput of goods in the micro-hub is crucial
- No, micro-hubs are generally too small for this
- Hubs that are large enough for automation are usually outside of cities
- Miscellaneous

Shares as a percentage

\* 2022 EHI White Paper: Quick Commerce – micro-hubs as last-mile game changers?



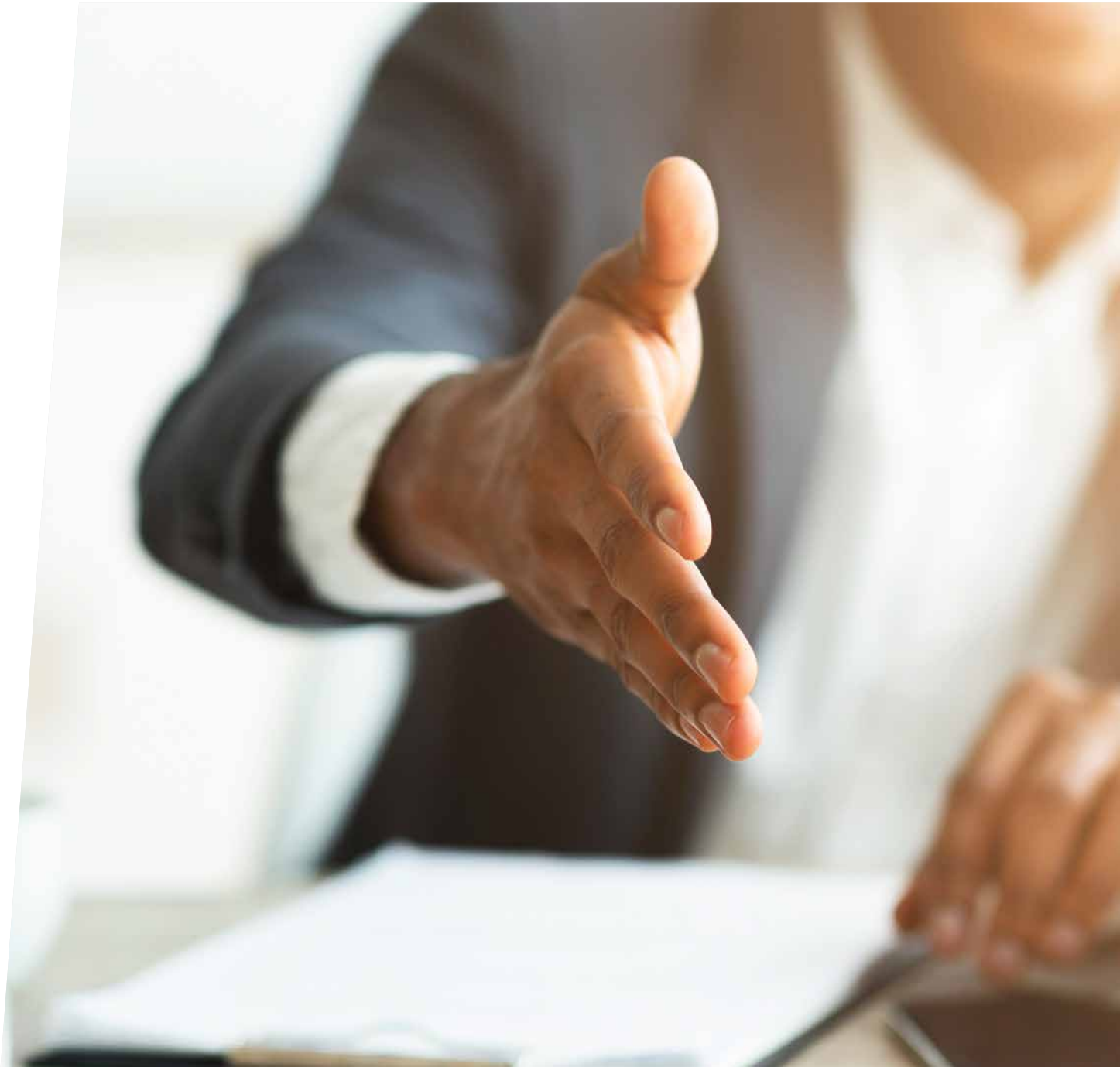
### ← **MICRO-HUBS AS COLLECTION POINTS:**

smart automation solutions assist employees in order picking processes. At the same time, the micro-hub is available to customers 24/7 as a collection point for spontaneous purchases.

### ←← **THE MICRO-HUB AS A COLLECTION POINT FOR CLICK & COLLECT SERVICES:**

current touchscreen displays save staff time and offer customers quick access to the goods they want.





## | OUR DRIVE – YOUR ENGINE!

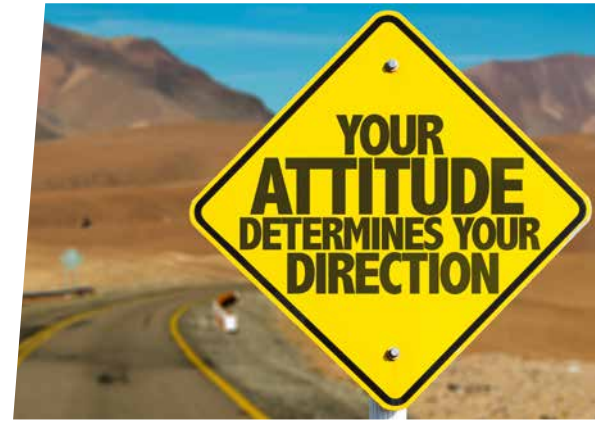
No “quick commerce” without “quick”

■ **In retail, continuous change** has always been the only reliable factor. This change has been further boosted by the online revolution in retail since the beginning of the 2000s and has gained enormous momentum in the recent past. As a technology leader and provider of complete solutions for shop fitting, we at WANZL not only want to be able to understand or accompany such trends – above

all, we want to play an active role in shaping them! In order to successfully support our customers in this, we are today developing the concepts for tomorrow’s retail trade.

Our solutions in the field of quick commerce encapsulate this willingness to take risks and the courage to look into the future. The highest demands are placed on process and handling speed here, because without “quick”





*// As a technology leader and provider of complete solutions, we want to play an active role in shaping trends //*



↑ **INCREASE PERFORMANCE** to sprint speed in marathons

→ **THE PATH FROM THE MICRO-HUB TO THE FRONT DOOR:** we make it as short as possible.

there is no “quick commerce”. In order to help customers reach top speed as quickly as possible, we have tested all our products and services for their usability for quick commerce, optimised them and, if necessary, equipped them with new components. This applies not only to the automation and digitalisation solutions that we offer as process accelerators in the direct vicinity of micro-hubs, but also to the design of our warehouse furnishings, which, in addition to quick planning and assembly, enable

quick access due to the best possible overview, and transport solutions that are geared to the most efficient processing of orders.

**This allows you to increase your performance to sprint speed even in marathons!**

# wanzl

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