



*The product is the*  
**EXPERIENCE**



2021



Collaboration

2022



New Economies

2023



Uniqueness

2024



Power of Marketing





# SHARE OF LIFE

COMO SE TORNAR PARTE  
E AMPLIAR A PARTICIPAÇÃO NA  
VIDA DO CONSUMIDOR



 **ABRAS'25** *food retail  
future*

21 A 24 DE SETEMBRO // CAMPINAS SP



# The Go to Market Evolution

## Share of Market: R\$ 523 Annually



**GPA:** Opening stores on every corner



**Extra:** Hypermarket boom



**Assaí:** Bulk wholesale for price leadership

*More locations, lower prices, bigger stores*

## Share of Wallet: R\$ 1,745 Annually



**Assaí:**  
From wholesale to categories + services + credit



**GPA:** Multi-format strategy capturing different occasions



**Carrefour:** Banking, insurance, expanding wallet capture

*Categories, services, loyalty, payment solutions*

# The Share of Life R\$ 4,920 year per shopper

## GLOBAL PIONEERS:



### Kroger:

Health clinics + Banking + Fuel =  
Life infrastructure



### 7-Eleven Japan:

Bills + Government docs + Concert  
tickets



**Tesco:** Mortgages + Mobile + Insurance  
+ Banking

## BRAZILIAN OPPORTUNITY:

### Your Store:

PIX hub + WhatsApp concierge + Community  
center

### Services:

Health workshops + Kids' homework clubs +  
Business centers

### Purpose:

From feeding bodies to enabling dreams









# 4,680

*Retail = Highest frequency touchpoints in consumer life*

*"CX is the living connection between you and your customers"*



# Common Wisdom

Pre-2022 Reality: Weekly Touchpoints • Push Model • Trust Unmeasured

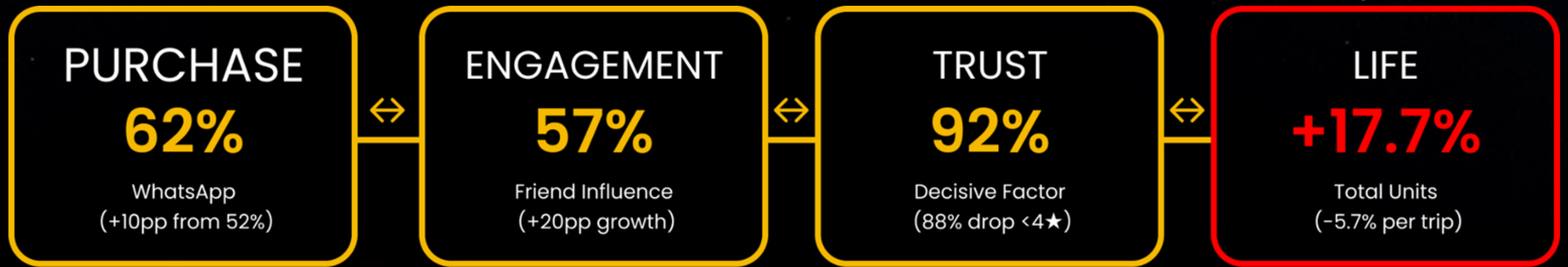


**The Push Era:** One-way flow • Weekly rhythm • Company decides, Consumer receives  
Missing: Daily touchpoints • Trust measurement • Micro-trip behavior • Social multiplication



# The New Reality

2024 Reality: Daily Touchpoints • Customer-Led • Trust Measured





# Brazilian Grocery Market

28 Million Families • 2.5 Billion Shopping Trips Per Year

## SHOPPERS

28 Million Families

WhatsApp Users

61%

Check daily

Only 8% buy through it

Download Apps

75%

Have the app

Only 19% use it daily

Shop Online

41%

Try it monthly

18% do it weekly

Plan Shopping Like Self-Checkout

61%

Make a list

39% buy on impulse

61%

Say they like it

Only 12% use it

## LEGEND

● Shopper

● Store

● Supplier

— Trust Flow

--- Money Flow

— New for 2025



# Brazilian Grocery Market

28 Million Families • 2.5 Billion Shopping Trips Per Year

## SHOPPERS

28 Million Families

### WhatsApp Users

61%

Check daily

Only 8% buy through it

### Download Apps

75%

Have the app

Only 19% use it daily

### Shop Online

41%

Try it monthly

18% do it weekly

### Plan Shopping

61%

Make a list

39% buy on impulse

### Like Self-Checkout

61%

Say they like it

Only 12% use it

## STORES

424,000 Locations

### Pix Payments

8%

Growing +193%

### Credit Cards

31%

Most popular

### Cash

17%

Still strong

### Trust Our Tech

66%

Say they trust it

But avoid using it

### Happy Staff

80%

Creates loyalty

## LEGEND

● Shopper

● Store

● Supplier

— Trust Flow

- - - Money Flow

— New for 2025



# Brazilian Grocery Market

28 Million Families • 2.5 Billion Shopping Trips Per Year

## SHOPPERS

28 Million Families

### WhatsApp Users

61%

Check daily

Only 8% buy through it

### Download Apps

75%

Have the app

Only 19% use it daily

### Shop Online

41%

Try it monthly

18% do it weekly

### Plan Shopping

61%

Make a list

39% buy on impulse

### Like Self-Checkout

61%

Say they like it

Only 12% use it

### Store Brands

34%

Families buy them

### Shelf Decisions

70%

Final choice here

## SUPPLIERS

R\$720M Trust Capital

4,680

90 per year

Lifetime Visits

### Payday Boost

+35%

First 10 days

### Impulse Buys

39%

Not planned

## STORES

424,000 Locations

### Pix Payments

8%

Growing +193%

### Credit Cards

31%

Most popular

### Cash

17%

Still strong

### Trust Our Tech

66%

Say they trust it

But avoid using it

### Happy Staff

80%

Creates loyalty

## LEGEND

● Shopper

● Store

● Supplier

— Trust Flow

- - - Money Flow

— New for 2025



# R\$245M Waiting at the Shelf

**SHOPPERS**  
28 Million Families

**61% make lists → 70% decide at shelf:**  
Planning meets opportunity

**STORES**  
424,000 Locations

## LEGEND

- Shopper
- Store
- Supplier
- Trust Flow
- Money Flow
- New for 2025



**34% buy store brands despite 90 visits each year:**  
90 chances per year to choose store brand, but 66% never do

**70% shelf decisions + 80% want helpful staff:**  
Staff should be where decisions happen



# R\$170M Waiting to be spent

## SHOPPERS

28 Million Families

**61% daily WhatsApp:**

Add payments where shoppers focus their attention

**+35% payday surge:**

Stock shelves when wallets are full

## STORES

424,000 Locations

Credit Cards

**31%**

Most popular

Cash

**17%**

Still strong

Store Brands

**34%**

Families buy them

Shelf Decisions

**70%**

Final choice here

Still tiny share

Impulse Buys

**39%**

Not planned

Payday Boost

**+35%**

First 10 days

**80% want helpful staff:**

Competent employees = longer visits

## LEGEND

● Shopper

● Store

● Supplier

— Trust Flow

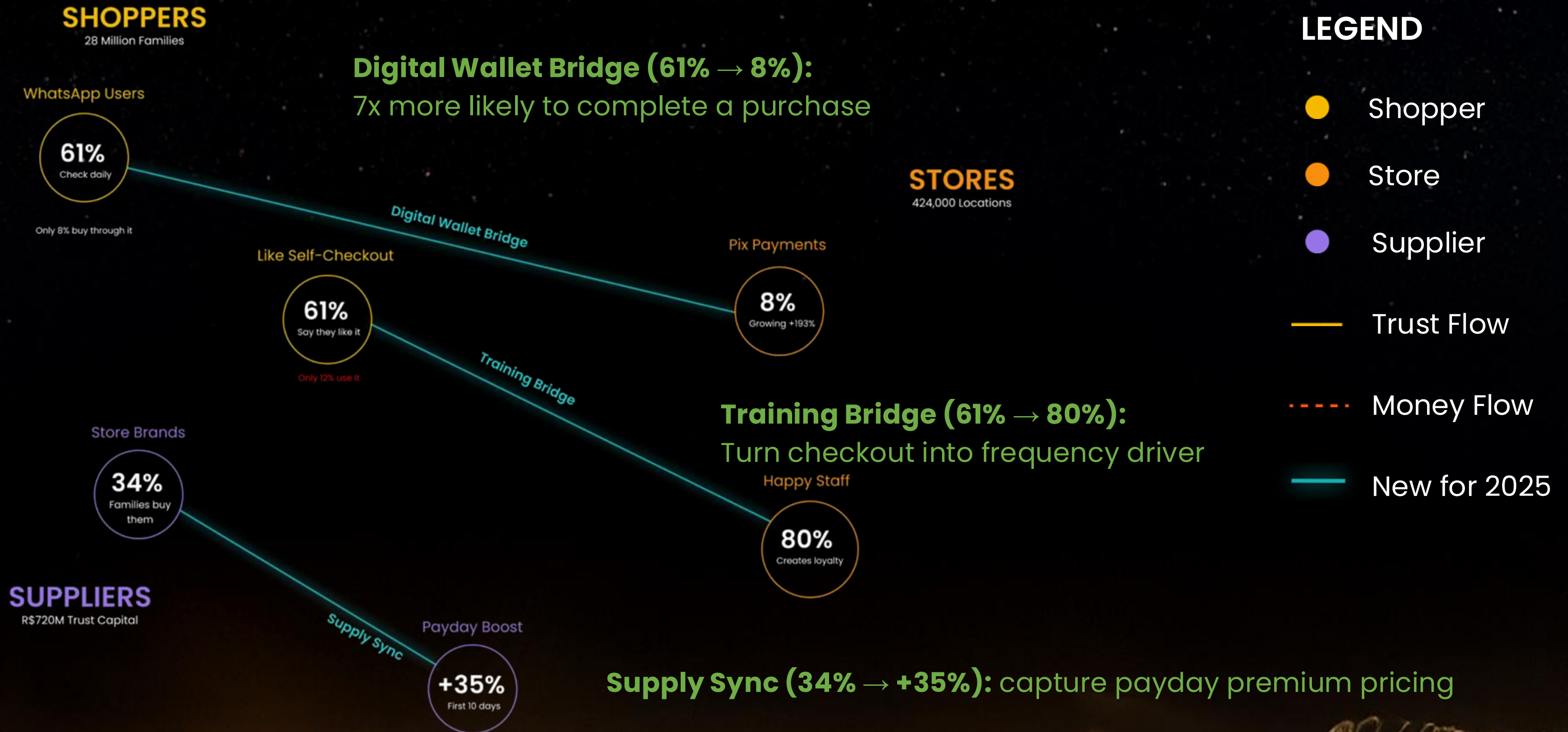
- - - Money Flow

## SUPPLIERS

R\$720M Trust Capital



# Three Revenue Multipliers









**Products Are Forgotten. Experiences Become Memories.**



**Memories create lifetime value.**

## GLOBAL



**Starbucks:**

Not coffee → "My morning ritual"



**Amazon:**

Not delivery → "They read my mind"

## BRAZIL



**iFood:**

Not delivery → "Part of every celebration"



**Magalu:**

Not retail → "Lu helped me choose"



# From a place I have to go to a place I want to go.



## **FREQUENCY:**

Morning rituals = Daily vs weekly



## **TIME:**

Community spaces = 20 min to 2 hours



## **WALLET:**

Trust = Whole basket vs items



## **MIND:**

Memories = Top-of-mind always



## **HEART:**

Belonging = Emotional Relationship



## Services That Multiply Share of Life



### TIME GIVERS

- Order ahead
- Quick pickup
- Meal solutions



### LIFE SIMPLIFIERS

- Recipe cards
- Kids' hour
- Senior mornings



### COMMUNITY BUILDERS

- Tastings
- Cooking classes
- Local producers

*"Small services, exponential returns"*



**Time**

**SHOPPER**

5% → 19%  
Conversion Potential

**STORE**

**Money**

**CX**

27% returning  
customers

4x Faster  
Inventory Turns

**SUPPLIER**

**Trust**







# Continue Your Journey



Chat with Camila and Dennis



Download the Book



Connect with **Camila** and **Dennis** on LinkedIn



Dennis Wakabayashi



Camila Ferreira





# Download the Book





Camila Ferreira

Dennis  
Wakabayashi

*The product is the*  
**EXPERIENCE**