Trading Review and Action Plan

[Client name] · [Store address]

Prepared by Richard Shorney, Genesis Retail

Six months of trading, 1 March to 31 August 2026, read alongside photographs of the chilled estate taken at the end of the period.

Demonstration copy

This is a sample of a Genesis Retail trading review. The client name, store location, dairy, bakery and symbol group have all been replaced with placeholders, and the store photographs have been removed. The trading figures and the analysis are unchanged from the original report.

How this report is put together

The first half tells you where your money comes from today. The second half is the plan, in the order I would do it, with the reasoning and the steps behind each one. Everything is in cash — pounds of gross profit a year — because percentages do not pay bills. Where a figure is not from your own till, it says so.

Before you start

Thank you for taking the time to send me your sales data and the photographs. It makes a real difference to what I can tell you.

This has been put together remotely, so I have not stood in your shop. If I have read anything wrongly, tell me and I will change it — you know the place and I do not.

You are on a reasonably busy through road with somewhere to pull in, which is worth a great deal and shapes most of what follows.

Your figures show soft drinks as your clear strength. Around 296 a day, and the best cash earner in the shop by a distance. Everything I am suggesting is built on that, because those customers are already through your door with their money out.

> **I think there is a real opportunity in three connected things: a wider chilled food range, hot food to go, and a branded coffee offer. You already have the cabinet and you already have a machine. What is missing is the range behind them and a name on the cup.**

If you decide to go down that road, it will mean refining and fine-tuning some of your current ranges to make room for the new lines. That is not a problem — the space is there, and section 4 goes through where it comes from and what I would put in it. Genesis Retail would be glad to help with any of it.

Richard Shorney

Genesis Retail

1. Where your cash comes from

Your till took £683,081 over the six months. Take out VAT, and take out the money that passes straight through you on PayPoint, the lottery and the Post Office counter, and you traded £383,148.

That trade earned £97,869 of gross profit. About £195,739 a year.

This is sorted by cash, not by sales and not by percentage. It is the only ranking that tells you where an hour of your time is worth the most.

Department	Cash GP a year	Sales, 6 months	Margin	Running total
Drinks	£50,746	£69,440	36.5%	26%
Alcohol	£30,289	£62,972	24.0%	41%
Alternative Smoking	£23,508	£25,154	46.7%	53%
Chiller	£19,178	£36,068	26.6%	63%
Confectionery	£14,328	£25,724	27.8%	71%
Tobacco	£11,397	£86,839	6.6%	76%
Groceries	£11,094	£19,312	28.7%	82%
Snacks	£10,852	£16,163	33.6%	88%
News/Mags	£6,772	£16,852	20.1%	91%
Frozen	£6,530	£9,296	35.1%	94%
Household	£4,277	£6,385	33.5%	97%
Tobacco Sundr	£1,984	£1,980	50.1%	98%
Pet	£1,948	£3,346	29.1%	99%
Hot Food	£1,085	£1,253	43.3%	99%
Miscellaneous	£1,056	£1,607	32.9%	100%
Electronic Goods	£423	£413	51.3%	100%
Stationery	£109	£120	45.2%	100%
Domestic Fuel	£69	£74	46.2%	100%
Unclassified	£57	£109	26.3%	100%
Sports and Recreation	£18	£20	44.4%	100%
Hardware	£15	£17	42.3%	100%
Clothing	£3	£3	41.8%	100%

> **Three departments out of 22 earn half your cash: Drinks, Alcohol and Alternative Smoking.**

2. The lines that pay your bills

Same question, one level down. These twelve lines earn most of your money.

Line	Cash GP a year	Margin	Units, 6 months
Drinks PM	£40,126	34.5%	46,229
Alternative Smoking	£23,508	46.7%	118,593
Chiller	£10,847	25.2%	12,204
Tobacco Cigs	£8,521	5.9%	5,866
Snacks PM	£8,198	32.1%	12,157
Drinks	£7,484	45.1%	5,825
Alcohol Beer	£7,035	21.6%	2,797
Alcohol Beer PM	£7,033	28.9%	2,601
Confectionery Choc PM	£5,745	25.5%	10,975
News/Mags News	£5,196	19.0%	7,801
Chiller PM	£5,179	29.9%	6,226
Alcohol Spirit PM	£4,242	18.1%	1,157

Drinks PM and Alternative Smoking together earn £63,634 a year. A third of everything you make, from two fixtures.

What this means in practice

Availability on those two is worth more than every other idea in this report put together. A gap on the energy fixture is not a missed sale — it is a customer who came in specifically for that and walked out with nothing.

Three things worth building into the routine:

1. Walk the energy and vape fixtures last thing before you close and first thing after the delivery lands. Those are the two moments worth checking.
2. Keep your top ten sellers on a written list behind the counter, not in your head. Whoever is on shift can check it without knowing the shop the way you do.
3. When a line is out at the wholesaler, put a face of something else in the space the same day. It keeps the fixture working while you wait for it.

3. What each line earns for the room it takes

Your chilled estate is five multi-door cabinets and every one of them is drinks. Drinks work — that is not in question. The question is whether every door is pulling the same weight.

The test below is cash gross profit a year for every line you stock. A line takes up space whether it sells or not, so this is the fairest way to compare a wine with a bottle of pop.

Fixture / line group	Lines stocked	Cash GP a year	Per line, a year	Margin
Chiller Non-Barcoded	3	£3,152	£1,051	26.6%
Drinks Non-Barcoded	3	£3,137	£1,046	53.3%
Alcohol Beer PM	40	£7,033	£176	28.9%
Drinks PM	337	£40,126	£119	34.5%
Alcohol Beer	73	£7,035	£96	21.6%
Chiller	115	£10,847	£94	25.2%
Alcohol Cider	30	£2,204	£73	25.0%
Drinks	107	£7,484	£70	45.1%
Alcohol Spirit PM	63	£4,242	£67	18.1%
Alternative Smoking	373	£23,508	£63	46.7%
Chiller PM	109	£5,179	£48	29.9%
Frozen Ice Cream	35	£1,323	£38	36.6%
Alcohol Pop	48	£1,666	£35	30.1%
Alcohol Wine	85	£2,947	£35	26.5%
Alcohol Spirit	61	£1,815	£30	23.2%

Slush and the counter chiller earn over £1,000 a line a year. Chilled wine earns £35.

Two things fall out of that. The lines doing the work are the ones where somebody walks in wanting that thing today. The lines at the bottom are ones you carry in case somebody asks.

One honest caveat before you move a single facing

This table does not know what brings people through the door. A line can earn almost nothing and still be worth stocking because the person who buys it also buys twenty pounds of other shopping. You know which those are and this report does not. Read the next section as a starting list for your judgement, not a set of instructions.

4. Rationalising the range to make room

[Photographs removed for this demonstration copy — chilled wine, three doors, 85 lines · the energy fixture]

	Lines	Units, 6 months	Cash GP a year	Per line, a year
Chilled wine	85	893	£2,947	£35
Bakery food to go	17	4,194	£4,970	£292
Slush machine	3	2,372	£3,154	£1,051

Eighty-five wines sold 893 bottles in six months. That is one bottle, per line, every two and a half weeks. Seventeen bakery food-to-go lines sold 4,194 units over the same period.

How I would work through it

1. Pull a sales report on the wine fixture alone, ranked by units. You will almost certainly find twenty lines doing the vast majority of it.
2. Mark anything that has sold fewer than a dozen bottles in six months, so you can see the shape of what is actually working.
3. Run each of those past two questions before deciding: is it somebody's regular, and is it on a supplier deal worth having? Anything that passes either stays.
4. Give the survivors proper facings and pull the shelf heights in. Twenty wines merchandised well look like a range and usually sell more than eighty-five spread thin.
5. Release the space in stages. Take one door back, fill it with chilled food, and see how the wine trades from the tighter range for a month before you take the second.

The same applies to spirits and Alcohol Pop

Spirits carry 124 lines between the two sub-departments for £6,057 a year. Alcohol Pop is 48 lines for £1,666. Both are worth keeping — neither needs the depth it currently has.

Worth noting on spirits: your price-marked spirits run at 18.1%, which is below the plain spirit lines at 23.2%. That is unusual — normally the price mark is the better earner, and it is on your beer. Worth a look at what you are paying for those.

What goes into the space

Chilled food. You already sell 4,194 bakery food-to-go items in six months — 23 a day — without a fixture built for it. Those seventeen lines earn £292 a line a year against £35 for a wine.

New chilled lines worth bringing in

A wider chilled range is the other half of the hot food and coffee offer. These are the areas I would look at, in rough order of how safely they fit what you already sell:

1. More sandwich fillings. You are selling a lot of sandwiches from a short range. Three or four more at the same price point is the lowest-risk addition on this list.
2. Breakfast to go. Bacon and sausage baps, made up chilled and heated to order once a hot unit is in. Morning trade on a through road is trade you are not taking today.
3. Wraps and a chilled salad or pasta pot. One or two lines, not a section. They catch the customer who wants lunch but not a pie.
4. Chilled snacking singles. Scotch eggs, individual pork pies, cheese and pickle pots, snack pots. These sell to the same person buying the drink, which is the whole argument in section 5.
5. Single-serve ready meals. In a village where a lot of people are eating alone, a small range of one-portion meals saves a trip to town.
6. A chilled dessert or two. Trifles, cheesecake slices, yoghurt pots. Small, but they add to a basket that already has a main item in it.

Start with six to eight new lines rather than thirty. Give them a fortnight, see what moved and build from there. Your symbol group account manager will have a chilled food-to-go range list, and that is the cheapest place to start because the ordering, the shelf life and the point of sale all come with it.

5. The biggest opportunity: chilled food and snacking

This is where the money is, and it is not close. Everything in sections 6 and 7 is a way of getting at it.

> **You sell around 296 soft drinks a day. Every one of those is somebody standing at your counter with their money already out.**

What they buy	Units a day	Cash GP a year	Margin
Soft drinks	296	£50,746	36.5%
Snacks	82	£10,852	33.6%
Chilled food to go	23	£4,970	24.6%
Hot drinks	6	£1,085	43.3%

For every three or four drinks that go across your counter, one bag of crisps goes with it. For every nine, one item of food. For every fifty, one hot drink.

Nobody needs to walk through your door who is not already walking through it. The whole opportunity is the second item.

Why snacking matters more than it looks

Snacks earn you 33.6% — better than drinks, better than chilled, better than beer, and a long way better than your blended 25.5%. It is £10,852 a year from 15,045 units and it is almost all price-marked, which is exactly right for your village.

Your top sellers there are Quavers, Hula Hoops, Doritos, McCoys, Skips — all at £1.35, plus the 85p and 69p bags underneath. That is a well-judged range for the money in that village. It is just not being sold alongside anything.

Where the chilled space is going

Chilled, excluding milk	Lines	Units, 6 months	Sales a week
Bakery food to go	17	4,194	£389
Everything else chilled	186	9,607	£584

Seventeen bakery lines do £389 a week. The other 186 chilled lines do £584 a week between them — about £3 a line, a week. Cheestrings, Peperami, Rustlers and the bacon are doing a job; a great deal of the rest is not.

That is the shape of a chiller that has been filled rather than ranged. Broad and shallow. The fix is not more chilled space — it is fewer lines, more facings on the ones that move, and the room that frees given to food to go.

What I would do

1. Pull a unit report on the chiller alone so you can see which lines are earning their place.
2. Start with anything perishable turning under a unit a week. Those cost you twice — the shelf space and the waste — so that is where rationalising pays fastest.
3. Take the facings you free and give them to the lines already selling: the sandwiches, the pies, the Rustlers, the Peperami and Cheestrings. Two facings of something that sells beats one facing each of two things that do not.
4. Move the snacks next to the food and the drinks, or at least in sight of them. At 82 bags a day against 296 drinks, the attach is there to be had and costs nothing to try.
5. Put the crisps at the height a working man reaches without thinking — chest to eye. The £1.35 price-marks should be the first thing seen, not the bottom shelf.

What this is worth

Snacks and chilled food together earn £30,030 a year today. They are your third and fourth best margin categories of any size. Every extra bag of crisps on a drink sale is around 36p of gross profit; every extra sandwich is around 59p. On 296 drink sales a day, a small shift in attach rate is worth more than anything else in this report.

6. What you already have, and what is missing from it

Two of the three things in this report are already in your shop. That changes the job from buying equipment to filling it properly.

[Photographs removed for this demonstration copy — chilled cabinet at the counter · bean-to-cup machine with unbranded cups]

The chilled cabinet

Good cabinet, good position — right at the till where somebody queueing has to look at it. The local suppliers livery is the right message for your village.

Rolls on the top, pies in foil, sausage rolls and bakes below. There is room in it for more than it is carrying, and the bottom shelf in particular has space to work with.

The figures say the same thing. Chilled outside milk is 203 lines doing £973 a week, and £389 of that comes from just 17 food-to-go lines. Those few lines are doing the heavy lifting, which is exactly why widening them is the opportunity.

What I would put in it

1. Use the bottom shelf. It is the one with room in it, and a cabinet that reads as full sells more than the same stock spread thin.
2. Widen the sandwich range. You sell 1,862 sandwiches in six months from a very short range. Three or four more fillings at the same price point is the cheapest sales increase available.
3. Add a chilled snacking block — cheese and pickle pots, snack pots, scotch eggs, pork pies in singles. Those sell to the same person buying the drink, not to a different one.
4. Keep the local supplier story visible. In a village that name is worth more than a price cut.
5. Face it up mid-morning and again mid-afternoon. Chilled food sells on looking fresh more than on anything else.

The coffee machine

You have the machine and you have the cups. What you do not have is a brand on either.

Hot drinks are 6 cups a day, earning £1,085 a year. For a machine sitting on the counter in a village where the same people come in every morning, that is a long way below what it should be doing.

The reason is almost certainly that nobody knows it is there. An unbranded machine with a plain cup does not tell anybody anything. A branded cup does the selling for you before a word is said — it says this is proper coffee, not a vending machine.

What I would do

1. Talk to your symbol group account manager first. Most of the symbol groups have a coffee-to-go programme with branded cups, lids, a machine wrap and point of sale, and it usually comes with the supply agreement rather than a separate bill.
2. Ask what the minimum weekly cup count is on any deal before you sign. That is the number that decides whether the arrangement suits you or them.
3. Get the branding on the machine, the cups and the lids. A branded cup walking down the road is the cheapest advertising you will ever buy.
4. Put a price on the front of the machine big enough to read from the door, and a sign outside if you are allowed one. On a through road with a pull-in, the sign is doing the work.
5. Site the cups and lids so a customer can serve themselves without asking. Anything that needs a question halves the sales.

And the one thing you do not have

There is no hot food. The cabinet is chilled, and every pie, pasty, sausage roll and bake in it is sold cold.

In a village like yours, on a road with a pull-in, in winter — that is the gap. A hot cabinet beside the coffee, selling the same stock you already buy from the same supplier, is the single biggest thing in this report. Section 7 goes through it step by step.

Why these three belong together

Hot food, branded coffee and a fuller chilled range are one offer, not three. A driver pulling in wants a coffee and something to eat with it. A man on his way to work wants a bacon bap and a cup. Put them together at the counter and each one sells the other. Separately they are three small lines; together they are a reason to stop.

7. Hot food to go

You have already built most of this without meaning to.

What you sell a day	Units
Soft drinks	296
Bakery food to go	23
Hot drinks	6

Seventeen bakery lines — sandwiches, steak and gravy, mince and onion, sausage rolls, corned beef pasties, pork pies. 4,194 units in six months, around 23 a day. That is a lunch trade. Nobody built it; the village did.

Every one of them is sold cold, and your entire hot offer is three buttons on a drinks machine doing 6 a day.

Why the hot cabinet is worth pricing

It is the same stock you already buy, from the same supplier, on the same delivery. Hot food sells at a higher price than the identical item cold, and it sells at a different time of day — you pick up the morning trade and the mid-morning break trade that currently walks past.

You also already have the proof that a machine-based food offer works here. Your slush machine earns 53% on 2,372 units — your best margin in the shop, from a piece of equipment that sits there and does its job.

Step by step

1. Ask your bakery supplier what they do for hot, and speak to two of the national food-to-go suppliers alongside them. They all run hot food-to-go programmes with a merchandising unit, a range list and a recommended retail structure, and any of them may part-fund the cabinet against a volume commitment. Always worth asking all three before you price one yourself.
2. Get two quotes: a heated multi-deck and a smaller counter-top unit. The counter-top is a fraction of the price and tells you whether the demand is there before you commit to a cabinet.
3. Work out your electricity cost and your wastage allowance before you set a price. Hot food has a short life and unsold stock at the end of the day is the thing that kills the margin.
4. Start with four lines, not twelve. The sausage rolls, the steak and gravy pie, the mince and onion, and one pasty — those are your four biggest bakery sellers cold, so they are the safest hot.
5. Site it where the queue already forms, not on the back wall. Hot food is an impulse buy made while somebody is standing still.
6. Run it for six weeks, then pull the sales and the wastage together. If it is not covering the electricity and the waste, you have lost very little and learned something.

8. A meal deal

You already stock every part of one. A sandwich, a soft drink, a bag of crisps. What you do not have is anything joining them up.

Step by step

1. Pick the price first, not the products. It needs to be a number people remember and it needs to beat buying the three separately by enough to notice.
2. Check the maths on your worst case — the most expensive sandwich with the most expensive drink. If that combination still leaves you a sensible margin, the deal is safe.
3. Limit it to the lines you want to move. Your own-label and your bakery range, not the premium drinks.

4. One sign at the food, one at the drinks fixture. Both sides of the deal need to know it exists.
5. Train whoever is on the till to mention it. On a deal like this the till prompt is worth more than the poster.

What these three have in common

None of them ask you to find a new customer. Every one of them puts a second or third item into a basket that is already at your counter. With 296 people a day buying a soft drink, that is the cheapest sale available to you.

9. Two fixes that cost nothing

[Photographs removed for this demonstration copy — milk on the bottom shelves, energy at eye level · the beer multipack door]

Lift the milk

Milk is on the bottom two shelves with energy above it, and the DAIRY header runs over a bay of energy and juice. Your local dairy is doing real work for you — a name in a village that knows it — and it is at ankle height.

Milk is not a profit line and should not be judged as one. It is the reason somebody comes in three times a week. Somebody who cannot see it from the door may not come in at all.

Protect the energy fixture above everything

Drinks PM earns £40,126 a year across 337 lines. It is the fixture most of your customers came in for, so availability there is worth more than any range change in this report. A quick look last thing and first thing after the delivery is all it takes.

A bigger milk pack — worth a phone call this week

Milk is doing real work for you. Around 50 units a day, and your dairy is a name this village knows. But look at the pack sizes you carry.

Your milk range	Units, 6 months
Local dairy semi, 2 litre	1,232
Fresh whole milk	1,205
Fresh semi skimmed	902
Local dairy whole, 2 litre	785
Local dairy whole, 1 litre	638
Local dairy, 500ml	382
Local dairy, 1 pint	352

Your biggest pack is two litres. Below that it is one litre, 500ml and a pint. There is nothing larger anywhere in the range.

Why that costs you more than it looks

Two litres is about three and a half pints. A family gets through that in a day or two. So a household that needs milk for the week cannot get it from you — they have to go elsewhere for it.

And once somebody is standing in a supermarket in the next town, they are not just buying milk. They are doing the shop. Bread, eggs, chilled, the lot. You do not lose the milk sale. You lose the whole basket, and you lose it every week.

What to ask for

1. Ring your dairy and ask what they can do in a three or four litre pack, and what it does to your margin at a price you could actually sell it at.
2. They are already your dairy, already on the delivery, and the name means something locally. This is not a new supplier or a new relationship — it is one line added to an order you are placing anyway.

3. If they cannot do it, ask your symbol group account manager what is available in a four or six pint. A national brand in a bigger pack still does the job.
4. Price it to be worth the trip. It does not need to beat the supermarket — it needs to be close enough that walking down the road beats driving into town.
5. Site it with the rest of the milk, at eye level, once the milk has been lifted off the bottom shelf.

Leave your small lines alone

You have 32 sub-departments doing under £2,000 each. Between them they earn £13,918 a year at 34.9%, better than your core range. Cutting them would free about £2,000 of stock money once and cost you that £13,918 every year after. Leave them where they are.

10. The order I would do it in

	What	Why this order	Cost
This week	Lift milk to eye level	Your footfall driver is on the floor. One hour.	Nothing
This month	Put a meal deal on	You stock all three parts already. Two signs.	Nothing
This month	Move snacks in sight of the drinks	82 bags a day against 296 drinks. The attach is there.	Nothing
This month	Increase chilled foods, snacking and sandwiches	The biggest opportunity in the shop, and the cabinet is already there.	Stock only
This month	Ask your symbol group about branded coffee	You have the machine. It needs a name on the cup.	A phone call
This month	Ask three bakery suppliers about hot	Same stock, same delivery, hot. Get two or three quotes before you commit.	A phone call
This month	Ask your dairy for a 3 or 4 litre pack	Your biggest is 2 litres. You lose the whole weekly basket, not just the milk.	A phone call
Next quarter	Rationalise wine to around twenty lines	Releases a door at the front for chilled food.	Time only
Next quarter	Price a branded coffee offer	Second item in a basket you already have.	Depends on the deal

The first three cost nothing but time and can be done before the end of the month. The three phone calls cost nothing either, and they tell you whether the bigger ideas are worth pursuing. Nothing on this list asks you to spend money before you know what it returns.

Not checked from your data

All sales, gross profit, margin, unit and line-count figures come from your own till export for 1 March to 31 August 2026, exclusive of VAT. Annual figures are the six-month figure doubled — scale, not a forecast. Shelf and door counts are read from your photographs; nothing was measured on site. Hot food and coffee margins are trade figures, not yours — a quote will settle those. No wastage figures were supplied, and the milk pack and meal deal are judgement based on your own attach rates. This export covers one six-month period, so nothing here shows what is already growing or falling. A second export covering the same months last year would add that, and it is the most useful thing you could send next time.