



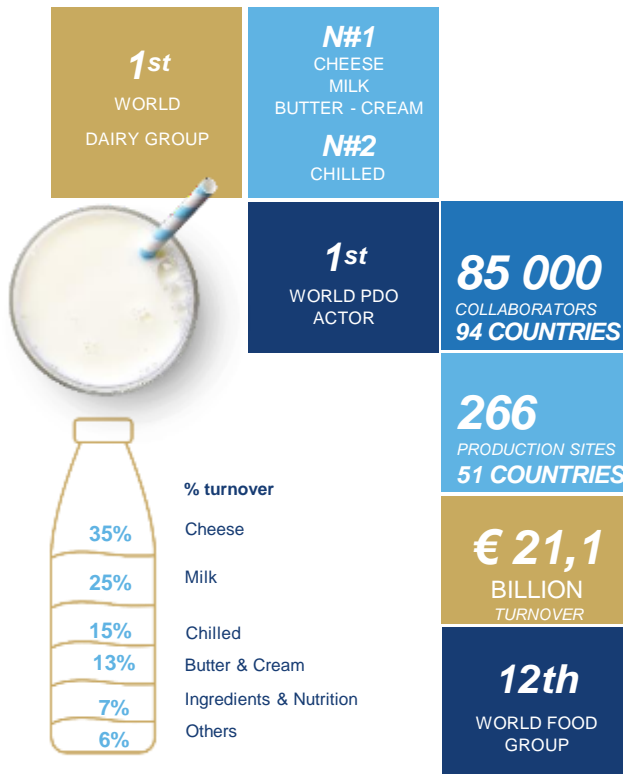
#ECRCATMANNETWORK



***THE COLLABORATIVE WAYS THAT MANUFACTURERS AND RETAILERS CAN TAKE
TO ADRESS THE CURRENT INFLATION SITUATION***



A family business that offers healthy and tasty products that bring us closer together



+350 BRANDS





Private labels
Price image retailers



Create value





NPD

New products
Downsizing

Channel Management

Price Image retailers

Range/Product Management

Product priority

All things being equal.....

Secure Turnover/Volume



Promotions

Create Value around product



Shopper benefits
Loyalty programs
Subscriptions
Contests

Services
(animations, advices,
expertise, gift,
product testing..)



In store Image
Seduction
Merchandising

Communication and
Events around points
of difference (CSR,
ingredients, local,...)

Impulsion via Cross
merchandising

Break Unit price perception



Master budget
Bulk area
Deli area



Change value
Communication on
Cost / pers.,
Cost / recipe-dish
Cost / moment-usage



THE CHEESE CATEGORY



Merchandising



Service



Promotion

+ 20%





THE CHEESE CATEGORY

8,8 Bil € category , 90% in Modern Trade

9,2% of Fmcg

1st category in **basket**

2nd FMCG category

23,7Kg / inhab

Part of the **French culture**



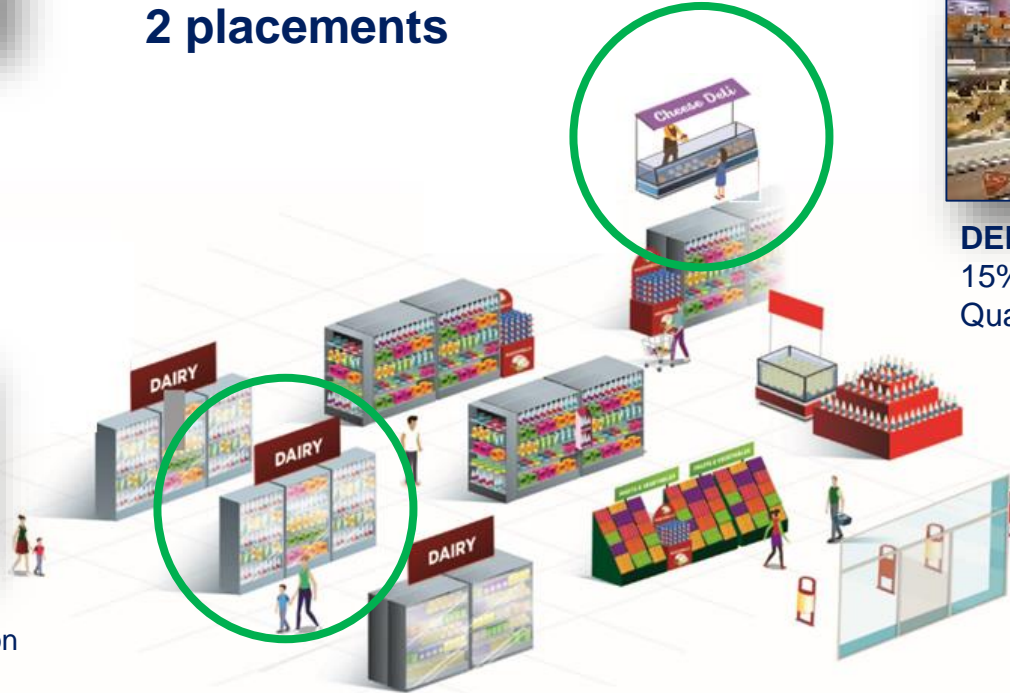


THE CHEESE CATEGORY

2 placements



DAIRY (shelf/fridge)
85% and 100% penetration
Price and Choice



DELI
15%, 1,1 Bil.€
Quality and Service



DELI CHEESE

Triggers

- => Destination category: -17% on Cheese traffic when Deli counter closing.
- => Store image & differentiation provider
- => Value: Pleasure / Healthy / Made in France / Responsible
- => Effective role of brands: Quality guarantee / Origin guarantee / Taste stability

Barriers

- => Low penetration: 10% -> 50% of Cheese shoppers
- => Price perception issue
- => Management costs

Shoppers opportunities



The Gourmets

20% of population
+50 years old
High revenue
High basket
Brand driven



The Cooks

25% of population
Young couple with children
Medium/Low revenue
High basket
Private Label driven
CSR

Retailers opportunities

Deli => Focus on Big Supermarkets

Intermarché



24% WD

The Gourmets

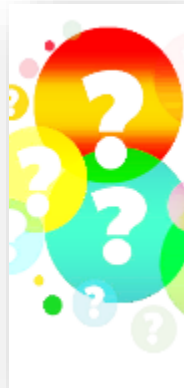
E.Leclerc

22% WD

The Cooks



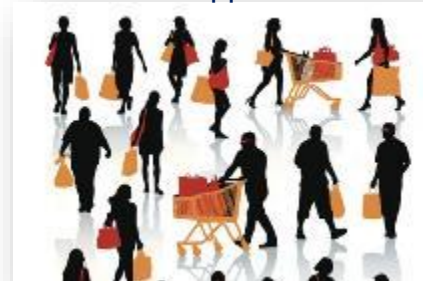
CATEGORY KNOWLEDGE



Role of the category
Purchase barriers and triggers
Best location
Best organization
Shoppers' segmentations
Shopper decision tree
Assortment
Promotional strategy



+ 3.000 shopper interviews



STRATEGY

DESTINATION Fromages



AMBITION

That the Deli Counter becomes a
DESTINATION CATEGORY

- The **best example** for the Deli Cheese category
 - **Expertise** (products, professional)
 - **Support of image and differentiation**



**Develop Traffic
in a confirmed Destination Category**

Strengthening Gourmets

Attracting Cooks

TACTICS

CREATE VALUE

✓ *Creation of a Deli Concept*



✓ *Segmentation by Usage*

Develop an organization which relies on 3 shopper input keys

Demonstrate offer & usages diversity

Space Management



Ergonomy



Showcasing the product



Organisation & Shopper flow



Design



Materials



Cheese Plate

75%

AXE
PLATEAU FIN DE REPAS

Local Cheese

10%

AXE
ANCRAGE RÉGIONAL

Catering Cooking

15%

AXE
CUISINE SNACKING

TACTICS

CREATE VALUE

✓ **Assortment Optimisation**

Focus on premiumness

Develop regional and local offer

Capitalize on brands to reinsure and to guide shoppers

Strengthen demand on a fresh cut qualitative offer



✓ **Focus on services**

Bring services and advices

Develop expertise and knowledge of the team



✓ **Being environment friendly**

Less packaging

Use recycled materials : recyclable trays, film



✓ **Impulsion with cross merchandising**



TACTICS

BREAK UNIT PRICE PERCEPTION

✓ *Communicate on budget mastering*

Cut on demand : the right quantity
Choice : portions variability
Advice on the good quantity



✓ *Development of « Sharing » offers*

Responding to new consumption moments
Develop ready-to-use solutions



TACTICS

SECURE TURNOVER – VOLUME

✓ *Promotional Event dedicated to the deli cheese*

Attract the Cooks

Generate positive assets for deli counter

Break the price barrier

Key success factors

- Visibility / Big events
- Traffic zone
- Attractive price discount
- Maintaining all deli values : choice, quality, services



IMPLEMENTATION & VALUE

DELI CONCEPT



Deli category adviser in 100% retailers
10 implemented full concept
Average +20% turnover



DELI EXPERTISE



Program deployed



DELI EVENTS



7.200 animated stores
60% of incremental volume
75% of 5 sku's / baskets





CATEGORY YOURS