



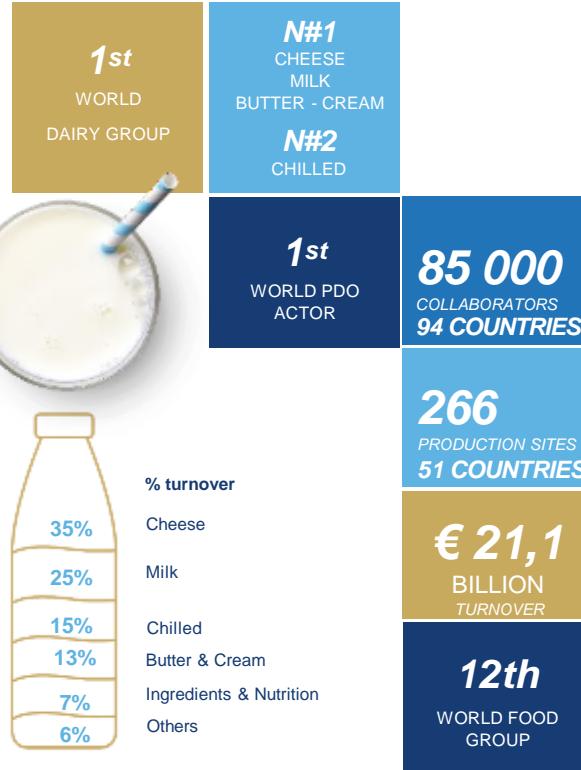
#ECRCATMANNETWORK



***THE COLLABORATIVE WAYS THAT MANUFACTURERS AND RETAILERS CAN TAKE
TO ADDRESS 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

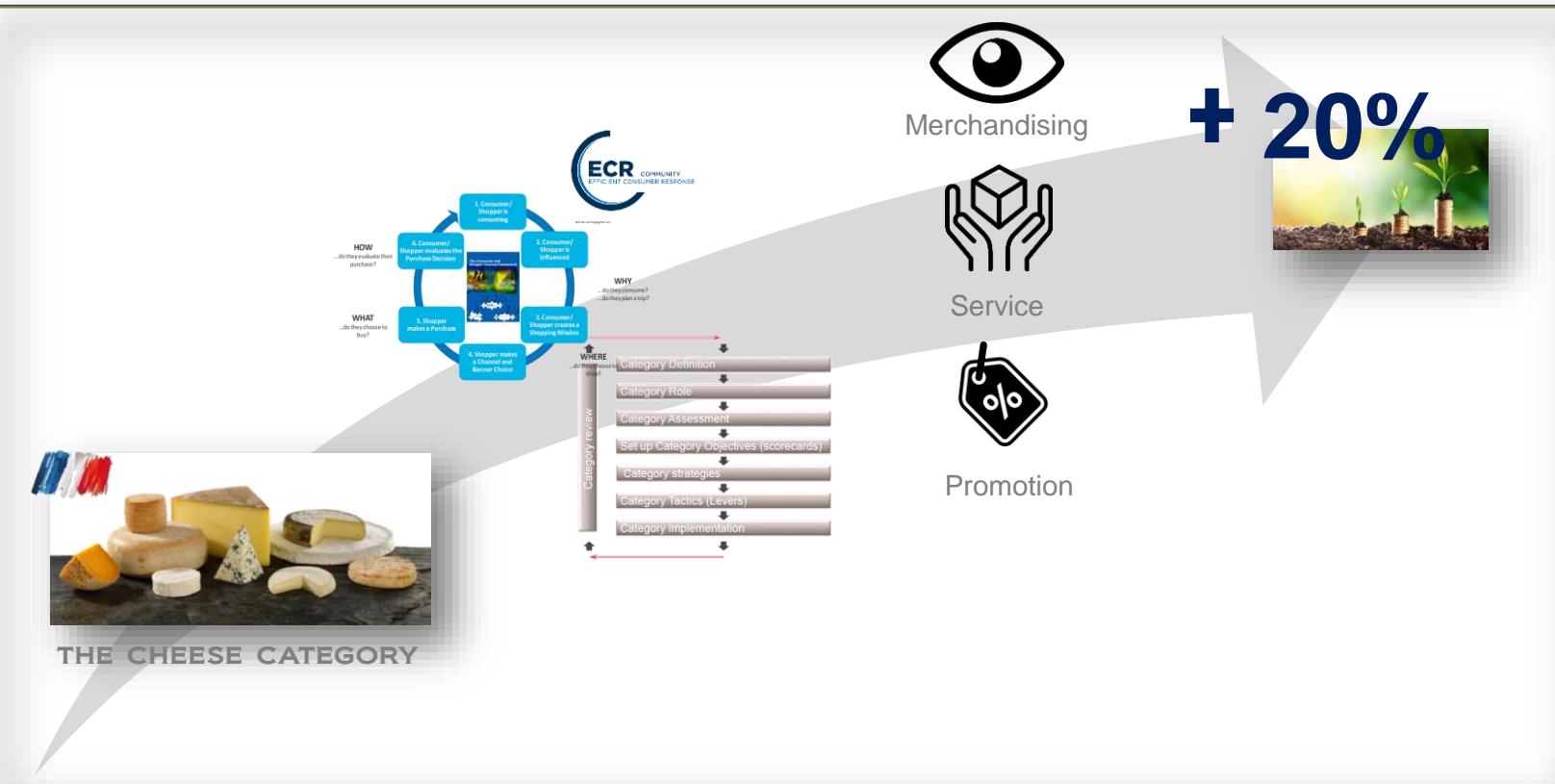
Communication and
Events around points
of difference (CSR,
ingredients, local,...)

Impulsion via Cross
merchandising

Break Unit price perception

↓
Master budget
Bulk area
Deli area

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





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



DAIRY
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

E.Leclerc

22% WD

The Gourmets

The Cooks

a long journey



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

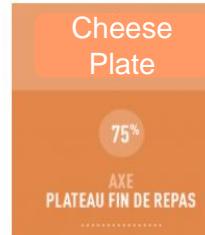
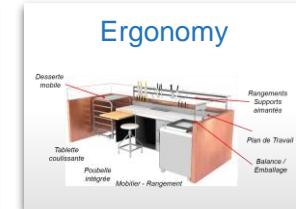
CREATE VALUE

✓ *Creation of a Deli Concept*



✓ *Segmentation by Usage*

Develop an organization which relies on 3 shopper input keys
Demonstrate offer & usages diversity



TACTICS

CREATE VALUE

✓ **Assortment Optimisation**

Focus on premiumness

Develop regional and local offer

Capitalize on brands to reassure and to guide shoppers

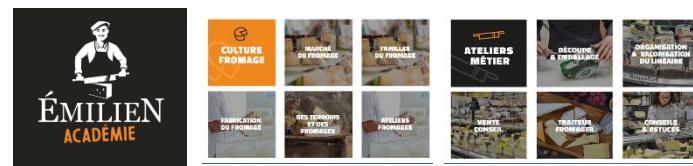
Strengthen demand on a fresh cut qualitative offer



✓ **Focus on services**

Bring services and advices

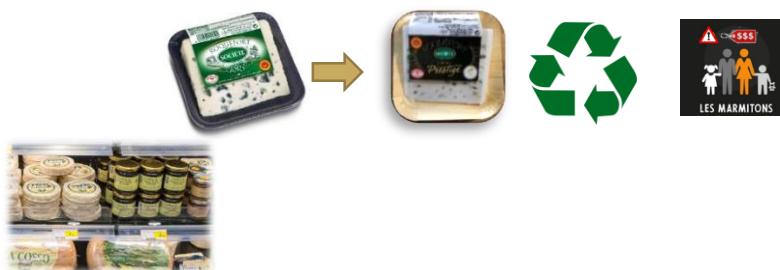
Develop expertise and knowledge of the team



✓ **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*

- Attrack 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



Carrefour



U-Intermarché



DELI EVENTS



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





CATEGORY YOURS