Customer Brodies
Environment Grocery - Hypers & Supers
Plan Owner Sam Smith

2021 GBP

istomer Performance	
Turnover / Sales (OOH/IH/RTMkt)	259.3m
Average Number of Meals Served Per Day (OOH)	N/a
Number of Outlets (OOH/IH/RTMkt)	28
Consumer Average Spend per Visit (OOH/IH/RTMkt)	58.75
Delivery Offered? (OOH/IH)	No
Thriving or Surviving? (OOH/IH/RTMkt)	Surviving
Menu / Proposition (OOH/IH/RTMkt)	Sell the best quality goods in a great shopping environment staffed by first class assistants.
Kitchen Facilities (OOH)	(On site coffee shops serving Cakes/Patries from the in-store bakery only).
Top 5 Dishes (OOH)	N/a
Destination Categories (IH/RTMkt)	Fresh - Vegetables/Fruit/Salad, Fish, Meat counters.
Category Role of Frozen (IH/RTMkt)	Squeeze - low growth, underspaced, underperform.
Preferred RTM Provider (OOH)	N/a

Customer's Challenges (Needs)

Increasing revenue without store expansion or an eComm offer - need to turnaround declines in revenue from the past 2 years driven by a reduction in shopping frequency at Brodies. Shoppers are using other stores for mainstream items and Brodies for their fresh offer.	Growth
Turn around a loss of £6.0m to breakeven without negatively impacting on the proposition & maintaining their reputation for quality/service.	Efficiency
Increase penetration of own label from 28% to 32% as a builder of Brodies brand & to support profit recovery.	Growth
Increase footfall with the upper income family shoppers & increase spend with existing upper income family shoppers.	Growth
Retain the loyalty of older single household shoppers.	Efficiency
"Own Christmas i.e. Exploit Brodies biggest seasonal trading spike with a 5.0% like for like sales increase being targeted.	Growth
Fund and maintain the Store upgrade programme (given previous results) - 5 stores due to be redesigned in 2020/2021.	Efficiency
Reduce operational costs without a reduction in staffing levels - improvements in supply chain efficiences are being targeted.	Efficiency
Build on reputation as being good for & good to the Community (accelerate ranges/offer from local providers).	Growth

McCain Performance in the Customer

McCain Sales (NSV)	329,325	
McCain Sales (kg)	395,199	
Investment Support	31,615	In 2019, mainly used to support retail price discount (c 15-20%) promotions in line with the Customers' strategy.
Investment as % of NSV	9.6%	
Investment/kg	8.0%	
Current McCain Service Package		

McCain Products Used (OOH) / Listed (IH, RTMkt)

1	Conventional	Speciality	Differentiated	Appetizers
	Gastro Chips 700g		Crispy French Fries 900g	BrewCity Cheese Brew Bites 200g
			Chilled - Shake Salt n Black Pepper 300g	BrewCity Onion Straws 150g
			Skin on Fries 800g	Brewcity Halloumi Fries 150g
			Sweet Potato Fries 500g	

Competitor Products Used (OOH) / Listed (IH, RTMkt)

Conventional	Speciality	Differentiated	Appetizers
Brodies Own Label Straight Oven Fries 1kg		Strong Roots - Mixed Root Veg Fries 500g (G Free)	Brodies Own Label Battered Onion Rings 454g
		Strong Roots - Sweet Potato Fries 500g (G Free)	

Learnings from Last Year

McCain outperformed Brodies Frozen Category sales in 2019 and grew slightly despite Brodies decline in sales. This was mainly driven by the listing of Chilled which performs really well and has headspace for greater growth in 2020. Price reduction promotions are not delivering any significant volume uplifts so a change in mechanic neesd to be tested & activity in place to drive base sales so we get a like for like volume/value increase.

Jobs To Be Done	Jobs To Be Done	Listing Targets	Status
Conventional	Grow Existing	Gastro Chips 700g	In Progress
Speciality	Win New	Jackets x 4 &/or Roasts 700g (range gaps)	Not Started
	Win New	Smiles 454g (gap in range for a Childrens product)	Not Started
Differentiated	Grow Existing	Chilled, Skin on & Sweet Potato Fries	In Progress
	Win Again	Crispy French Fries (at risk of delist given Own Label ROS)	Not Started
Appetizers	Grow Existing	BrewCity (secure position for 12 months)	In Progress
	Win New	Crispy Dippers 650g	Not Started
Local Portfolio			

Alignment

McCain Marketing Activity Plan	Increasing revenue without store expansion or	Turn around a loss of £6.0m to breakeven with	Increase penetration of own label from 28% to	Increase footfall with the upper income famil	Retain the loyalty of older single household	"Own Christmas i.e. Exploit Brodies biggest s	Fund and maintain the Store upgrade programme	Reduce operational costs without a reduction	Build on reputation as being good for & good
Grow the core	х	х	Possible threat	X (Smiles, Roasts, Jackets)	X (Roasts/Jackets)			X (Range Review)	
Develop Appetizers through Brew City.	X					x			
Win in Breakfast.									
Win in Delivery.									
Win in Sharing Occasions.						X (Crispy Dippers)			

Opportunity Calendar

pportunity Calendar														
Top 3 Joint Opportunities	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Activity Plan	Status
Max the mix	х	х	х										Support Dobies Growth & Efficiency challenges through a Category review to make Frozen work harder and deliver at least fair share of 5% (vs. 4.0% currently i.e. an incremental £2.6m for Brodies). Review, range incl. pack size strategy vs their target Shoppers, space allocations (essisting & start macro space conversation), build role of brand so that Own Label expansion is focussed in relevant areas of Frozen. Get Customer agreement in June to lead this - start building credentials incl. understanding more about Supply Chain initiatives & factor in to the Cat Review.	Not Starte
Make the current range work harder	x	х	х	х	х	х	х	х	х	х	х	х	Develop and gain agreement to a plan that drives base sales and promotional volume across existing lines (new lines to be included after the Category review). Leverage lower cost activity (Brodies Loyalty card) on lines that over index with older shoppers, propose testing uplift on multibuys, cross promo with chilled fries & own label fish. (INCL the XMAS spike in plans).	
Uptrade the Snacks of the craft Beer drinker	х	х	х	х	х	х			х	х	х	х	Work with the monthly spotlight on "local guest beers" to identify the best BrewCity accompaniment and cross communicate in store & in the monthly Brodies Newsletter. Explore the opportunity for a roll in weekend secondary freezer to be sited next to the spotlight bay in the Beer fixture.	
Optimise the Supply Chain	TBC												Learn more about what Brodies are looking to achieve in their Supply Chain work & the implications for the Category review (& McCain).	Not Starte
Top 3 McCain Specific Opportunities	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Activity Plan	Status
Lead/own the Category Review	х	х	х										As above - the opportunity to secure at least 3 new listings & change pack architecture to be in line with Brodies target Shopper & improve McCain profitability. Improve base sales & get to fair share (based on current range that would be worth c.£80k to McCain).	Not Starte
Reduce frequency of small deliveries	TBC												Improve cost to serve & make more efficient for us and the Customer - this would improve our profitability.	Not Start
Increase volume through multi-buy promotions.	х	х	х	х	х	х	х	х	х	х	х	Х	Test to understand the impact on base sales - Buyers concern is that it reduces frequency od purchase and full price sales. Discussions underway.	

SMASH 12	Month	Objective

Comments	
Brodies share of trade is 5% but Frozen is underperforming at 4%.	
Buying Team are looking for support - the Frozen Buyer is under pressure to get back to fair share of trade but has a really small space to work with.	
No plans to expand in-store food/drink offer.	
Own Label growth is being explored in Frozen and is a risk in our category but plans are more about Veg (whch leverages Brodies reoutation for Fresh Veg).	
Aunt Bessies are constantly trying to get listings but have been unsuccessful so far because the Buyer doesn't want more suppliers to manage.	