

# MANAGING THE NEW NORMAL: DISTRIBUTOR SUPPLIER RELATIONSHIPS



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# DAY 270

## SINCE MY LAST OVERSEAS TRIP TO MADRID



# WHAT'S NEXT ?



# COMMERCIAL DISTANCING



# GROCERY BUSINESS REMAINS STRONG



## Strong results in Q3, largely driven by COVID-19

- Net sales were €17.8 billion, up 6.8%; up 10.1% at constant exchange rates
- U.S. and Europe comp sales growth excluding gas in Q3 was up 12.4% and 7.5%, respectively
- Net consumer online sales grew 62.6% in Q3 at constant exchange rates

## Record growth in Q3 2020 (+8.4%)

### A QUARTER MARKED BY EXCELLENT SALES MOMENTUM

- › **Brazil (+26.0% LFL): Record growth thanks to an unmatched ecosystem**
  - Carrefour Retail (+26.6% LFL) fully benefited from the repositioning initiated in 2018
  - Customers favor Atacadão (+25.8% LFL), the market's most competitive commercial model
- › **France (+3.8% LFL): Positive customer response to initiatives to improve their satisfaction**
  - The transformation is accelerating in hypermarkets (+2.5% LFL)
  - Supermarkets (+4.9%) and convenience (+5.3%) continued on a positive trajectory
- › **Spain (+6.3% LFL): Another strong performance, reflecting Carrefour's attractiveness**



Q3 2020 SALES - 28/10/2020

# FOOD OUTLOOK **POSITIVE** DURING RECESSION

## Growth of Retail Segments

### U.S. Retail Segments Recession vs. Average Growth

1993-2019 Dollar Sales CAGR and Standard Deviation in Annual Growth Rate



PPT. Δ

-1.0	-4.2	-3.0	-2.1	-6.9	-4.1	-8.6	-9.6	-7.9	-13.6	-15.6	-17.9	-11.5	-8.5
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SEGMENT SIZE (\$B)

\$781	\$778	\$717	\$356	\$270	\$78	\$786	\$138	\$98	\$382	\$118	\$1,264	\$518	\$6,284
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Health and personal care stores also less impacted

1. CAGR 2007-2009. Source: U.S. Census Retail Trade, data ending February 2020. IRI Consulting analysis





ISSUES & TRENDS > CONSUMER TRENDS

# 'Rebound, Reboot, Reinvent': What retail and CPG companies can expect in a post-coronavirus world

Source: A C Nielsen

A focus on in-store hygiene and safety is just one of the many ways retail has been affected during the coronavirus pandemic.

# MANAGING THE **NEW** NORMAL

1. **New Normal Consumer Habits**
2. **E-commerce**
3. **New Business Development**
4. **Organizational Change:  
“Less time for Travel, More Time for Thinking”**



# WORK FROM HOME, PLAY AT HOME

- Three meals per day
- What's for Breakfast ? Lunch ?
- New Chef's
- Rethink Food



# CHANGING CONSUMER HABITS



# RETHINK FOOD

Facebook  
Dinner  
Updates



Charcuterie  
Board  
Challenge



# 10 NEW RECIPES TO TRY FOR DINNER



# KRAFTHEINZ: STRATEGIZE AROUND FUTURE CONSUMER EXPERIENCES

**KraftHeinz**

**Our Reorientation**

How We Used to Think

☐	☑	☑	☑
☐	☑	☑	☑
☐	☑	☑	☑

55 Product Categories  
3 Temperature States

**Our New Paradigm**

How Consumers Think

How can I spice up my regular chicken?

How can I save time cooking dinner tonight?

What can I snack on before dinner for energy?

- **A New Approach**
- **Leveraging Our Strengths to:**
  - ✓ Derive Proprietary Consumer Insights
  - ✓ Organize More Like Consumers Think
  - ✓ Evaluate the Consumer Journey & Occasions
  - ✓ Strategize Around Future Consumer Experiences

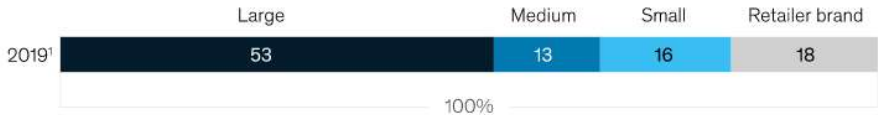
**Compelling Findings & Opportunities**



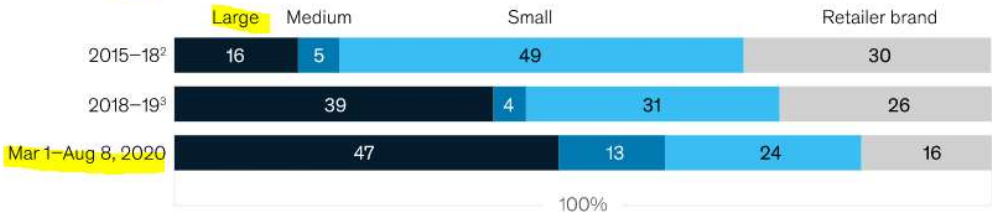
# RECORD SALES FOR LEGACY BRANDS

**Trials of new brands are changing the growth composition of the consumer-goods industry.**

**Share of sales by company type, %**



**Share of growth by company type, %**



Note: Companies sized by yearly sales (large: >\$2.5 billion; medium: \$500 million-\$2.5 billion; small: <\$500 million).  
<sup>1</sup>Share for 52 weeks ending June 15, 2019.  
<sup>2</sup>Share for 52 weeks ending June 20, 2015, through 52 weeks ending June 16, 2018.  
<sup>3</sup>Share for 52 weeks ending June 16, 2018, through 52 weeks ending June 15, 2019.

McKinsey & Company



## Ghost Kitchens: Food Delivery Amid Lockdown

Ghost kitchens, cooking facilities that produce food only for delivery with no eat-in or customer-facing areas, could create a USD\$ 1 trillion global opportunity by 2030.

Learn more by downloading our on-demand webinar, [Ghost Kitchens: Food Delivery Amid Lockdown](#).

## Ghost Kitchens: Food Delivery Amid Lockdown

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# NEW NORMAL –IMPLICATIONS

- ✓ Analyze consumer habits driving sales increases ( or decreases)
- ✓ New marketing for recipes or food pairing
- ✓ Adapt your Foodservice channel model for “take out and delivery”
- ✓ Ideas to make Menu planning easier and fun
- ✓ Partner/Co Promotion with Big Brands winning the New Normal

“New Ideas to Sell Old Brands”



NEWS > ONLINE RETAIL

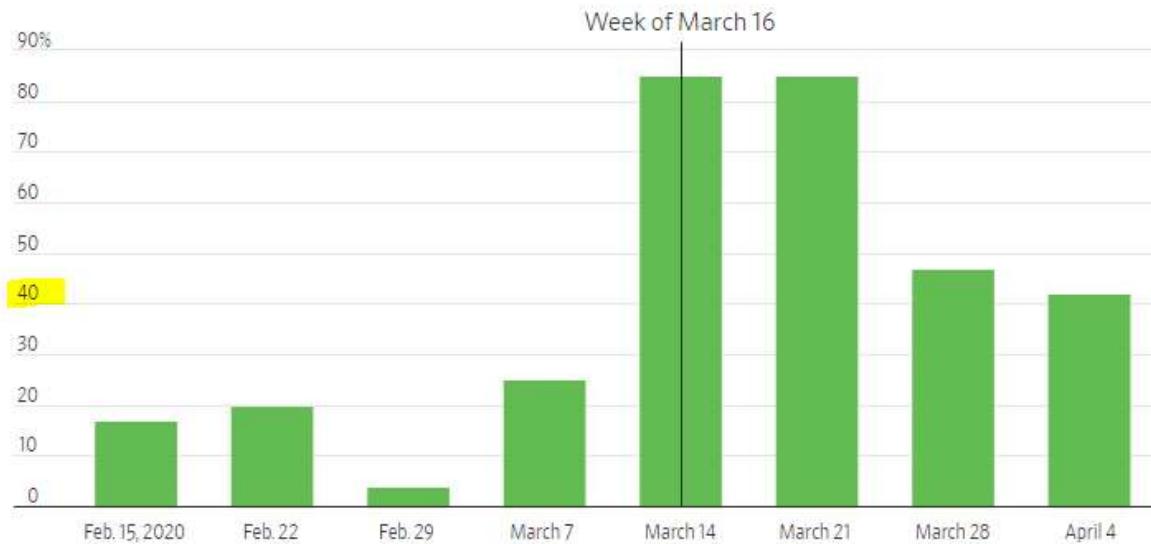
## Online grocery sales to grow 40% in 2020

Nearly half of shoppers are buying more groceries online due to COVID-19, Coresight Research finds

Almost half of shoppers said they're buying more groceries online or have started making online purchases because of COVID-19, Coresight's study revealed.

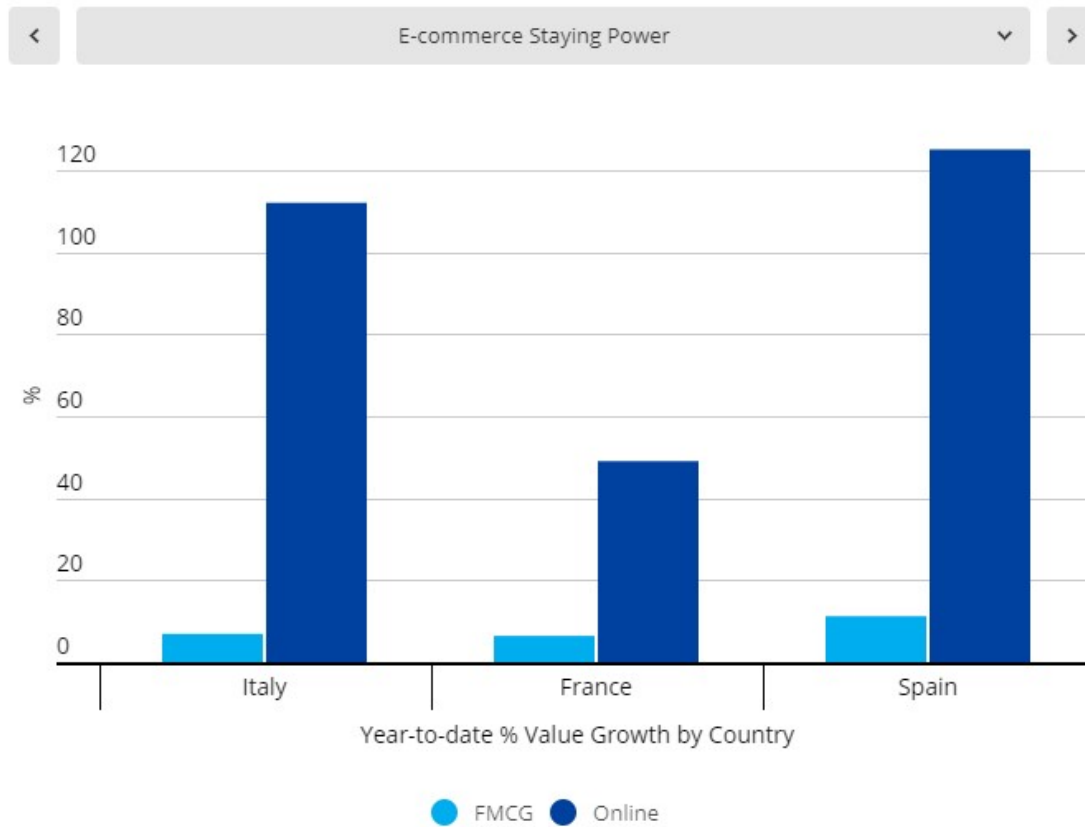
# E-COMMERCE: PIVOT POINT

Weekly online grocery sales,  
change from six months earlier



Source: Nielsen

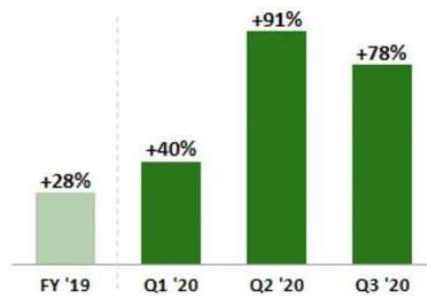
# STRONG FMCG ENGAGEMENT ONLINE AHEAD OF FESTIVE SEASON



# MONDELEZ -ECOMMERCE GROWTH

## CAPITALIZING ON ACCELERATION OF ECOMMERCE CHANNEL

eComm revenue +71% YTD; 5% total MDLZ<sup>1</sup>



% MDLZ NR<sup>1</sup>: ~3%    ~4%    ~6%    ~5%

Strategic driver of profitable growth

- Incrementality across all eComm channels
- Additive to profit with comparable margins to offline sales
- Continuing to invest in eCommerce and increase digital working media spend
  - Expanding assortment to meet channel needs
  - Recreating the impulse experience online
  - Investing in capabilities such as drop-ship
  - Exploring incremental opportunities in channels like eB2B and D2C



## Ahold Delhaize Looks Ahead to 2021

5 Nov 2020

Ahold Delhaize will continue to solidify its position as an industry-leading omnichannel retailer in 2021 and beyond, according to a Q3 earnings call. Currently, Ahold Delhaize's U.S. businesses reach approximately 90 percent of households in its markets with home delivery and Click & Collect services. In 2021, the retailer plans to **increase its online capacity** by nearly 100 percent in the U.S. and **nearly 50 percent in Europe.**

# AMAZON SMART SHELF



## Never run out

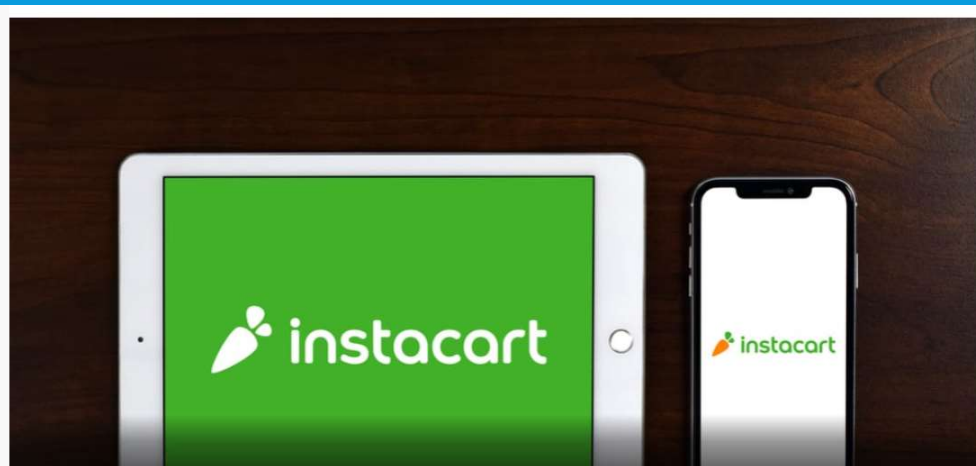
Get what you need, when you need it. Dash Smart Shelf makes it easy to stay stocked on the items that keep every day running smoothly.





# INSTACART –PERSONAL SHOPPER

## \$35 BILLION IN SALES



Unicorn delivery app **Instacart** has raised \$200 million as part of a new financing round, which upped the company's valuation to \$17.7 billion, the Silicon Valley startup **announced** on Thursday (Oct. 8). The new round of funding came from existing investors Valiant Peregrine Fund and D1 Capital Partners.

The company has raised more than \$2 billion since it was **founded** in 2012 by Apoorva Mehta, Brandon Leonardo and Max Mullen. Instacart's valuation has more than doubled since the COVID-19 pandemic caused more people to shop online and from home.

"**Instacart** has gone from a convenience to a lifeline for millions of people," the company said. "Today's investment comes as consumer demand for Instacart's service continues to grow and we continue to expand our marketplace with new and existing retail partners."

Instacart said it has **already surpassed its 2025 milestones and is tracking to exceed \$35 billion in grocery sales in 2020**, according to a Bloomberg **report**. The company partners with over 500 retailers and delivers goods from nearly 40,000 store locations across the U.S. and Canada.

## PepsiCo launches two direct-to-consumer websites for snacks and beverages to meet demand for at-home eating

By Mary Ellen Shoup [✉](#)

11-May-2020 - Last updated on 11-May-2020 at 16:55 GMT

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On PantryShop.com, consumers can order specialized bundles containing PepsiCo brands such as Quaker, Gatorade, SunChips and Tropicana, within categories such as "Rise & Shine," "Snacking," and "Workout & Recovery."

# Mondelēz Shifts Investments To Paid Media To Capture Online Orders And US Snacking

by [James Hercher](#) // Wednesday, April 29th, 2020 – 2:17 pm

Share: [Twitter](#) [Facebook](#) [LinkedIn](#) [Email](#)

Retail foot traffic and recessions be damned, people need to snack.

That fact has boosted Mondelēz, despite the coronavirus crisis and economic downturns. And, unlike in previous recessions, Mondelēz is investing to win market share, instead of cutting spend to protect the bottom line, CEO Dirk Van de Put told investors on a quarterly earnings report on Tuesday.

Some brands and investments are being hit. Mondelēz owns the gum



**Snacks On  
Snacks**

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## *Distributor E-Commerce Scorecard*

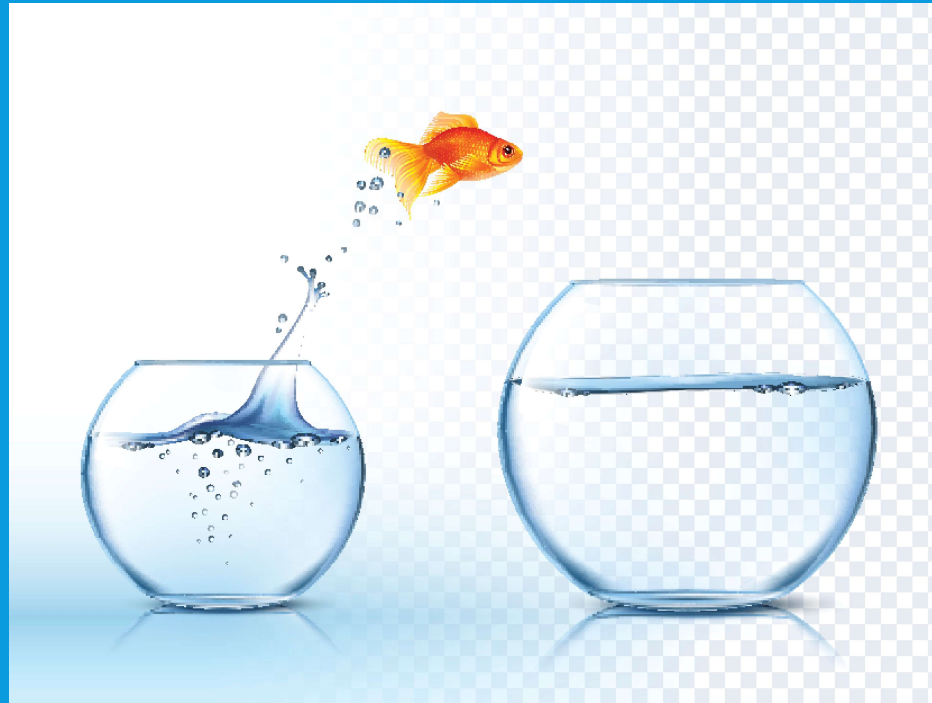
E-commerce development and digital marketing expertise is a top priority.  
International distributors must establish a plan and demonstrate patience.  
Are your distributors e-commerce leaders, performers, or laggards?

Assessment Criteria	Considerations	Rating: (10 = Best)
Distributor CEO Commitment	• Investment, engagement, and patience	
E-Commerce as Percent Total Sales	• How big is e-commerce for distributor?	
E-Commerce 2019 Growth Rate	• Results: 2020 trends? 3 year CAGR?	
2020 E-Commerce Growth Objective	• Benchmark versus overall country growth	
E-Commerce Team	• Dedicated? Experience? "A Players?"	
E-Commerce Analysts	• Dedicated or shared?	
Digital Marketing Manager	• Experience? Budget? Examples?	
Logistics: Fulfillment Capability	• Solution to deliver by unit?	
Top E-Commerce Customers	• Coverage, penetration?	
Amazon: Treated as Key Account?	• 2019 sales, trends, items listed	
# Items Sold: Your Brand	• Listed items at major retailer like Amazon	
# Items on Page 1 or 2: Your Brand	• Listed items on page 1 or page 2?	
Your Brand Share: Page 1 or 2	• Category share of items on page 1 or page 2?	
Category Sales Ranking: Your Brand	• Sales rank for key items	
# Customer Reviews: Your Brand	• Total number of reviews for your brand	
# Positive Reviews: Your Brand	• Number/percent of 4 and 5 star reviews	
Reputation Management	• Responsiveness to consumer feedback	
Percent Third Party Sales: Your Brand	• Sales trends through 3rd party merchants	
Special Packs	• Capability to create e-commerce packs	
Pricing: E-Commerce vs. Retail	• Pricing equilibrium: retail and e-commerce	

# E-COMMERCE IMPLICATIONS

- ✓ Manufacturers: How do you share Home Office E-commerce & Digital Marketing expertise with distributors ?
- ✓ Distributors: Transition E-Commerce channel from “niche” to mainstream key account.
- ✓ Hire Young People ( under 30!) to manage E-commerce and Digital Marketing
- ✓ Explore Direct to Consumer web shops
- ✓ Scorecard results ( before its too late!)

# NEW BUSINESS DEVELOPMENT 2021





# Export Passport





## Exporter Classification\*

Type	Description	Export Profile
10	<b>Multinational</b>	Strong market share everywhere across multiple categories.
9	<b>Global</b>	Multinational. Mix of leading countries and niche participation.
8	<b>Category Champion</b>	One core mass category. Strong performance globally.
7	<b>Icon</b>	Well known, niche leader. Global availability. Example: Tabasco.
6	<b>Regional Leader</b>	Strong share across one continent/region. Some export success.
5	<b>National Hero</b>	National treasure, #1 brand. Exports to homesick expats, tourists.
4	<b>Player</b>	Respectable share in home country. Opportunistic exports.
3	<b>Participant</b>	"Me too" product. Opportunistic exports. "Trader"/private label.
2	<b>Challenger</b>	Innovator. Some listings in home country. New to export.
1	<b>Start-up</b>	Trying to get traction in home country. Export "dreamer."

\*Export Solutions' classification system

## *Exporter Data Sheet*

### What Distributors want to Know about Your Company

*New Business Opportunity:* \_\_\_\_\_ (*Company Name/Country*)

Key Contact:		Telephone:	
Web Site:		Email:	
Founding Date:		Ownership:	
Annual Sales:		Total Employees:	
0-\$50 million	\$50 million - \$250 million	\$250 million- \$1 billion	\$1 billion +
% Sales International:			
0-10%	10-25%	26-50%	50% +
Exporter Classification/Description: _____ (#1-10, based upon Export Solutions' scale)			
Core Product Range:			
Unique Selling Point:			
Market Share:			
Home Country:	Country A:	Country B:	Country C:
Current Business in Distributor's Country:		Yes/No:	Size \$:
Current Customers (Distributor's Country):			
Investment Model:	Listing Fees*: Yes/No	*average \$35 per item, per store	
Trade Promotion Budget:	Dead net price:	10% of sales:	Mass:
Marketing:	Digital:	Sampling:	360 degree:
Ambition/Size of Prize:	Sales:	Market Share:	
Year 1			

## Distributor Classification\*

Stars	Title	Description	Prime Prospects
★★★★★	Champion	Massive distributor. Handles multinational/#1 brands across many categories.	Brand leaders. \$\$\$ marketing budgets. Exporter types: 6-10
★★★★	Captain	Category Captain. Handles leading brands in one segment.	Category innovators/leaders. \$\$ marketing budgets. Exporter types: 5-9
★★★	Player	Mid-size distributor. Handles #2/3 brands or niche leaders across many categories.	Differentiated, premium brands. \$-\$ marketing budgets. Exporter types: 4-7
★★	Participant	Respected local. Diversified product portfolio. Results equal to investment.	Flexible, challenger brands. \$ marketing budget. Exporter types: 2-4
★	Pioneer	Small distributor. Entrepreneurial, open to innovative new companies.	Start-up brands. "Pay as you go" marketing. Exporter types: 1-3

\*Export Solutions' classification system

## Export Express

### Online Distributor Dating: 2020 Rules

How do you sign new distributors without traveling and trade shows? The export community is rushing to virtual trade shows as a new tool. Leading distributors are already past the early novelty of online “blind dates.” What are the new rules of online distributor dating? View Export Solutions’ 10 tips for a successful “match.”

#### 1. Are You a Good Fit For Each Other?

The process of exporter and distributor linkage is frequently random, with little thought to pre-screening for prime prospect candidates. Our Export Passport system classifies exporters from level one “start-ups” to level ten multinationals. Distributors range from one star “pioneers” to five star “champions.” Exporters should focus on Prime Prospect distributors that represent a good potential fit based upon their business aspirations and investment level.

#### 2. What Distributors Want to Know

Create a one page, fact based company profile focused on “what distributors want to know.” Export managers fill distributor inboxes with offers loaded with information on product attributes, but fail to address key issues regarding brand competitiveness for a country. What is your pricing strategy relative to competition? How much will you invest in promotion and media? What is a reasonable size of the prize for the distributor?

#### 3. Brandscaping – Credentials Makeover

Your website is the first place a potential new distributor will check before confirming a web meeting. Has your site been updated to reflect Covid 19 realities? Conduct a credentials makeover of your web site, company catalog, and standard presentation. Focus on commercial facts such as your market share, social media campaigns, and launch model versus bland promises on superior performance and the claim that you export to 30 countries.

#### 4. First Date – Casual Coffee

Think of your initial web meeting with a distributor as a first date for a coffee. Do not try to overwhelm the distributor with facts and PowerPoints. Send presentations, samples, and your profile in advance. Devote the “first date” to telling your “brand story” in a personal way. Share relevant local examples while supplying a rationale why the distributor and his country represent a good match with your ambitions.

#### 5. Second Date – Working Lunch

What will the relationship look like if the brand and distributor decide to work together? Export manager can share a brief containing their objectives (size of prize), pricing, investment model, and marketing strategy. Motivated distributors will design a business plan and questions. These items should be shared in advance. The second date should be devoted to talking about the proposed plan and gaining alignment around key issues.

#### 6. Samples – Essential

A distributor will not buy your product without tasting it. Send samples in advance. Distributors will be compelled to accept the virtual meeting at the very least to share local feedback on taste preference. Include a small gift with your company logo.



#### 7. Online Category Reviews – Local Research

Many top supermarket chains feature e-commerce web shops. It's simple to conduct basic overseas category reviews from the comfort of your home office. This allows you to capture local category dynamics in advance of your call and validate distributor performance at leading retailers. Export Solutions’ retailer database tracks more than 2,500 retailers in 96 countries, with one-click links to retailers web shops as available.

#### 8. YouTube Videos Make You Stand Out

Create a fun 2-3 minute YouTube video. Show your factory, product range review, and introduce your export team. Demonstrate your creativity and what an energetic partner you will be. Balance original content with professional quality.

#### 9. Check Out Their Family

Reference checks are essential with online distributor dating. Conduct a Google map search to see the distributor’s building. Check out how many employees they have on LinkedIn. See their depth of product listings on local supermarket web shops. Check with two or three of their existing suppliers. Run a Dun and Bradstreet financial check. No company is perfect, but you must provide extra attention to the due diligence process during this period of uncertainty.

#### 10. Visit Before the Wedding

Online distributor dating (or Zoomerco) can streamline the process of new distributor screening. However, nothing replaces the intimacy of a personal visit to the distributors country. It may be possible to complete the preliminary “dating” steps online. However, it may make sense to delay the wedding ceremony until you can visit the country in person. Divorce is ugly and costly. As with many couples in love today, it may be better idea to delay the wedding to enjoy a longer honeymoon. Good luck!



## Intimacy Lessons

How do you maintain distributor intimacy without travel?

The world of export development is built upon a strong foundation of long term partnerships between great brands and committed distributors. Fortunately, many exporters dedicated years (and many late nights) to creating lasting bonds. However, it remains a challenge to nurture relationships when travel is restricted.



The Zoomer era forces us to rethink our communication practices. The frequency and type of interaction should be different. For example, in the past you might visit a distributor a few times per year and see him at a major trade show like Anuga or ISM. This may now be supplemented by monthly Zoom style meetings versus faceless telephone calls.

Positive distributor relationships are like a marriage. Both parties must work hard at communication during good times and lean years. Listed below are Export Solutions' suggestions on keeping the spark alive.

### 1. Frequency is Favored

Find a way to connect on a regular basis "beyond email." Vary the format to include Zoom meetings, a handwritten thank you note, or a personal gift of an item with your company logo on it.

### 2. Involve the Extended Family

Brand owners should extend distributor contact through periodic zoom meetings with distributor owners, supply chain, and finance managers just to touch base. Many distributor brand managers are just "messengers" versus key decision makers.

### 3. Fewer, Longer, Market Visits

The new reality may dictate fewer overseas trips. Say goodbye to a "meal and a deal" and a store check on the way to the airport. Schedule quality time with a week in a priority country. This allows you to dig deep into issues, meet many team members, and spend a full day at retail. You may even find time to get to know the country through a visit to a local tourist site or museum.

### 4. VIP Invitations to Your Corporate Headquarters

Create a tradition of an annual visit by the distributor to your head office. These trips allow you to share your product innovation pipeline, meet your senior officers and treat your distributor team as VIPs. An added benefit is that you secure 100 percent of the distributor's attention, without the distraction they face in their own country.

### 5. Respond Immediately

The best way to maintain intimacy is to respond immediately in times of crisis. Normally, distributors are reactive, serving as credible middleman between brand owners aspirations and the heavy demands from their local customers. In export markets, situations emerge due to political issues, currency fluctuations or other market disruptions. Brand owners that engage immediately are loved. "Helpers are heroes."

Leap forward with a smile to the future of international development. The essential marriages between brands and distributors will continue. Winners will embrace new tools and strategies to flourish in the Zoomer era.

Good luck!

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# NEW BUSINESS DEVELOPMENT IMPLICATIONS

- ✓ Open for Business: Manufactures & Distributors must resume normal cycle of pursuing new business partnerships.
- ✓ Time to refine strategic new business development process  
Find Brands/partners that are the Right Fit
- ✓ Follow the new rules of online Distributor dating, but be selective.
- ✓ Nothing replaces the intimacy of a personal meeting!
- ✓ Market your distributor brand



# NEW WORK- NEW NORMAL





# 2019 WORK

- Business travel – Trade fairs
- Supplier visits & Dinners
- Trade promotion management
- Meetings, Meetings, Meetings
- How do we sell more ?



# NEW FLIGHT PATTERNS



Masked passengers fill a Southwest Airlines flight from Burbank to Las Vegas on June 2, with middle seats left open. (Christopher

# 2020 WORK

- No travel- Work from home
- Web Brand Owner and Buyer Meetings
- Intense focus on Supply Chain
- Struggling to figure out E-commerce
- More time to think!



## Desktop Distributor Management

How do you motivate distributors without a personal visit?

Managers received the “gift of time” to perform “more thinking and less traveling.”

Check out Export Solutions’ 15 strategies to build your international business from the home office.

#1 Tip – Be nice, remain positive!

Strategy	Considerations
E-Commerce Development	<ul style="list-style-type: none"> <li>• Critical time to upgrade distributor capability or get left behind.</li> </ul>
Pivot to Supermarkets	<ul style="list-style-type: none"> <li>• Capture food sales shifted from Foodservice to Supermarkets.</li> </ul>
Recession Planning	<ul style="list-style-type: none"> <li>• Apply lessons learned from 2008-9 recession.</li> </ul>
Deep Dive Business Analysis	<ul style="list-style-type: none"> <li>• What’s working? What’s not? Changes for “New Normal”?</li> </ul>
Distributor CEO Contact	<ul style="list-style-type: none"> <li>• Secure input on CEO outlook and second half 2020 forecast.</li> </ul>
Distributors: Winners or Watch-outs?	<ul style="list-style-type: none"> <li>• Big brand distributors enjoying record sales. Niche product distributors suffering.</li> </ul>
Retail Sales Contest	<ul style="list-style-type: none"> <li>• Stores are open. Perfect time to generate field sales excitement.</li> </ul>
Training Webinar	<ul style="list-style-type: none"> <li>• Educate distributor teams on new products and strategies.</li> </ul>
Weekly Inventory and Sell-out Data	<ul style="list-style-type: none"> <li>• Required to keep supply chain full and detect early problems.</li> </ul>
Watch Currency and Oil Prices	<ul style="list-style-type: none"> <li>• Easy to identify future problems: oil dependent nations and countries with 20-30% currency devaluation vs. \$ USD.</li> </ul>
Research New Markets/Distributors	<ul style="list-style-type: none"> <li>• Gain head start on 2021 growth opportunities.</li> </ul>
Price Survey	<ul style="list-style-type: none"> <li>• Lots of movement. Survey now to avoid surprises later!</li> </ul>
Adjust Trade Marketing Plan	<ul style="list-style-type: none"> <li>• Consider investment shift to digital marketing and promotion.</li> </ul>
Results versus Country Conditions	<ul style="list-style-type: none"> <li>• Identify performance out of sync with overall market reports.</li> </ul>
Start Thinking About 2021!	<ul style="list-style-type: none"> <li>• Rough comparisons versus 2020!</li> </ul>

# # 1 TIP – BE NICE





# NEW WORK.....BUT OLD TEAM





# WHAT WILL THE INDUSTRY BE LIKE IN 2025 ?



# DO WE NEED TO TRAIN THE YOUNG PEOPLE OR WILL THEY TRAIN US ?



# BRANDSCAPING

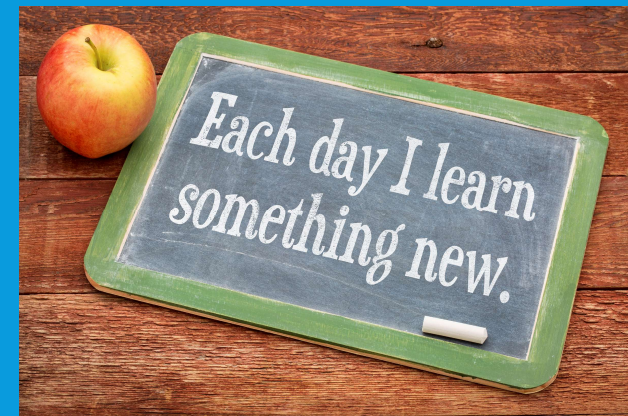


# BRANDSCAPING



# HOW WILL YOU USE THIS GIFT OF TIME ?

- What changes will you make to your strategy ?
- What did you achieve from your “wish list” ?
- Did you learn something new ?
- What is better than before ?





# 5 KEY POINTS-2021

- ✓ Rethink Food: Recipes for New Meal Habits
- ✓ Invest in E-commerce strategy and Digital marketing. Scorecard.
- ✓ Identify Strategic New Business Opportunities...”Right Fit”
- ✓ How should your organization be redesigned ? “Brandscaping”
- ✓ Emerge Stronger than Before- “Think Positive”



# BLOOM, NOT GLOOM

