



iplc |

international private label consult

The Retailer Brand Specialists

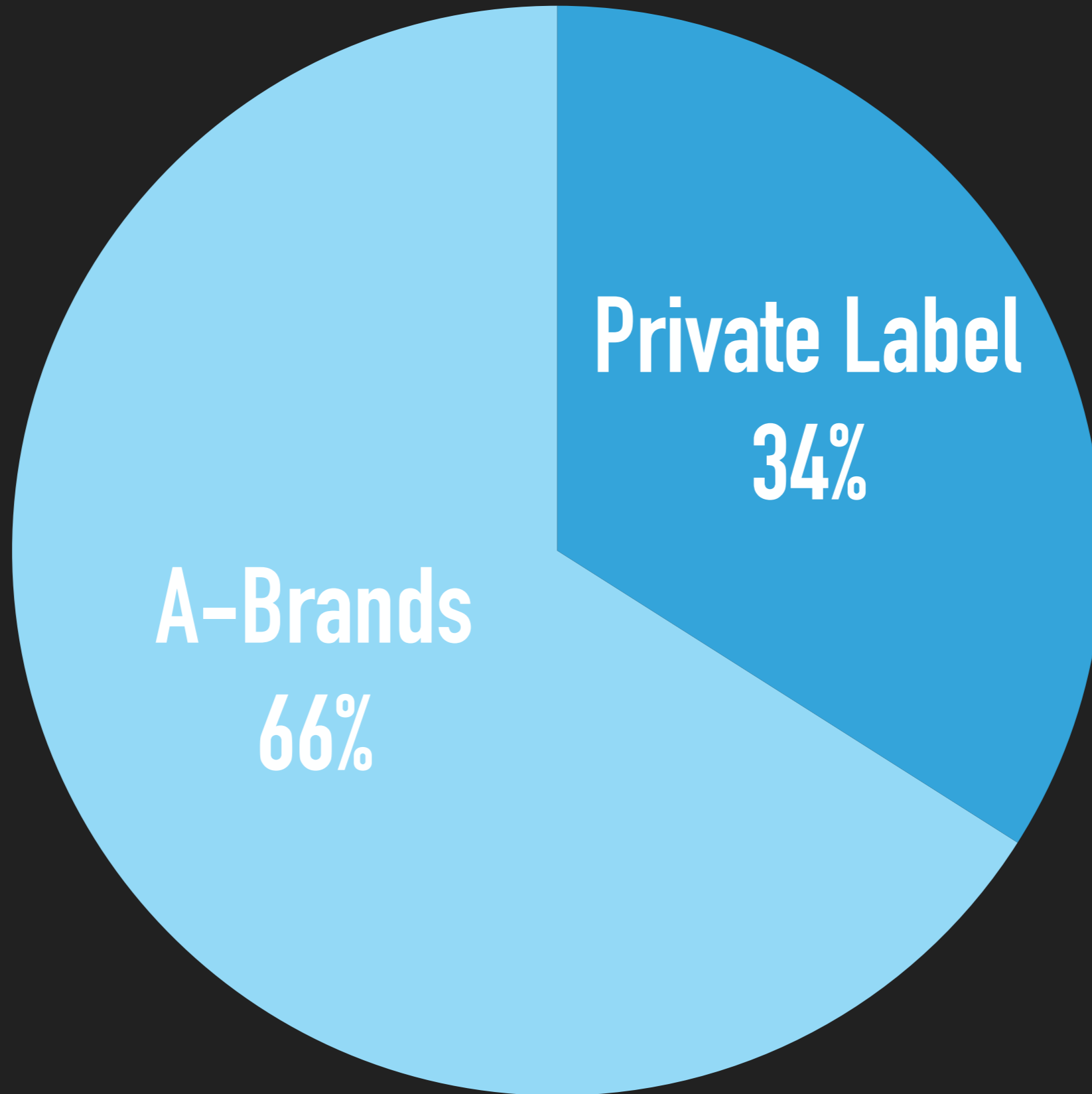
CROSSING THE BORDERS THROUGH

PREMIUMISATION



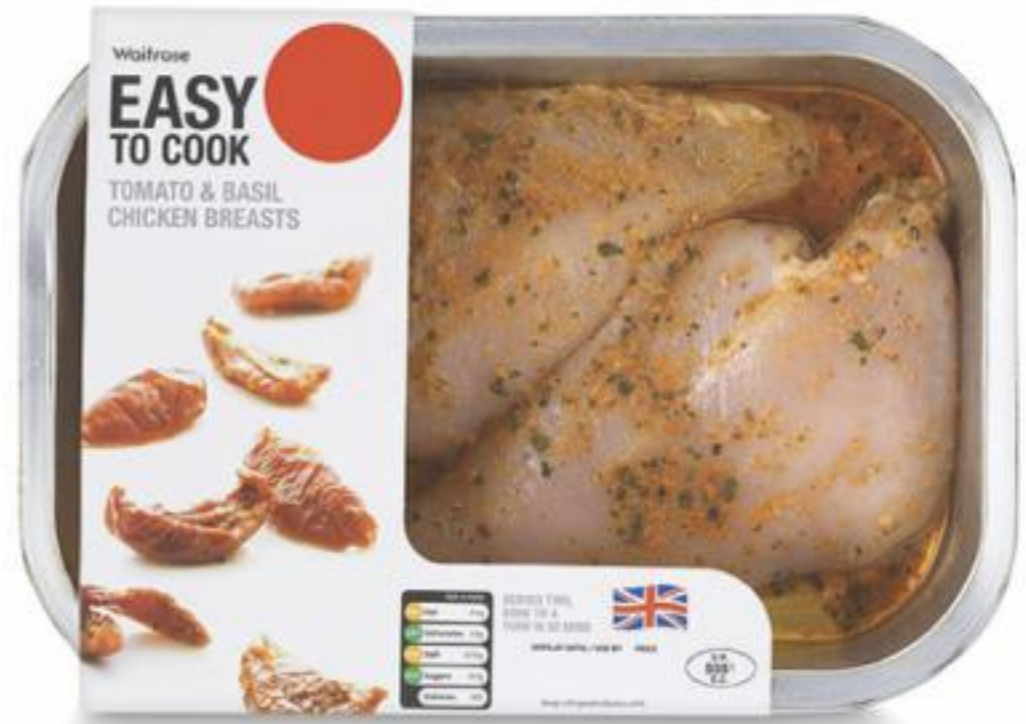
FROM PRIVATE LABEL
TO PRIVATE

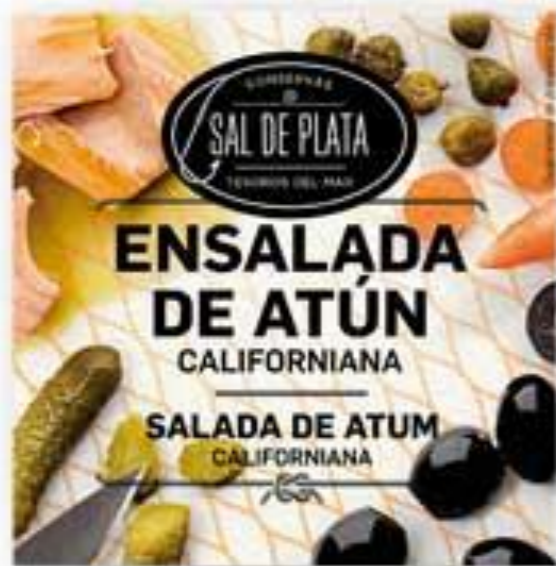
BRAND



**I DON'T LIKE TALKING IN TERMS
OF MARKET SHARE. I DON'T WANT
TO SHARE MY MARKET WITH
ANYONE.**

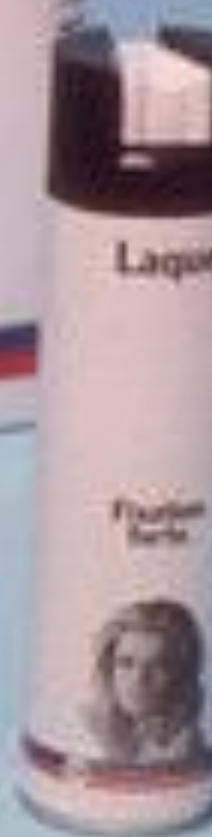
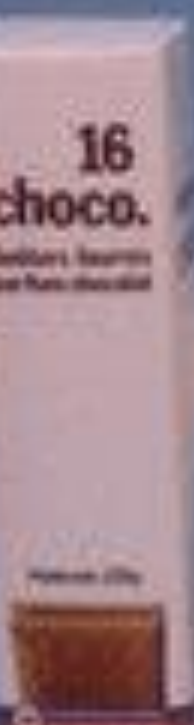
Larry Light , former CMO MacDonald's

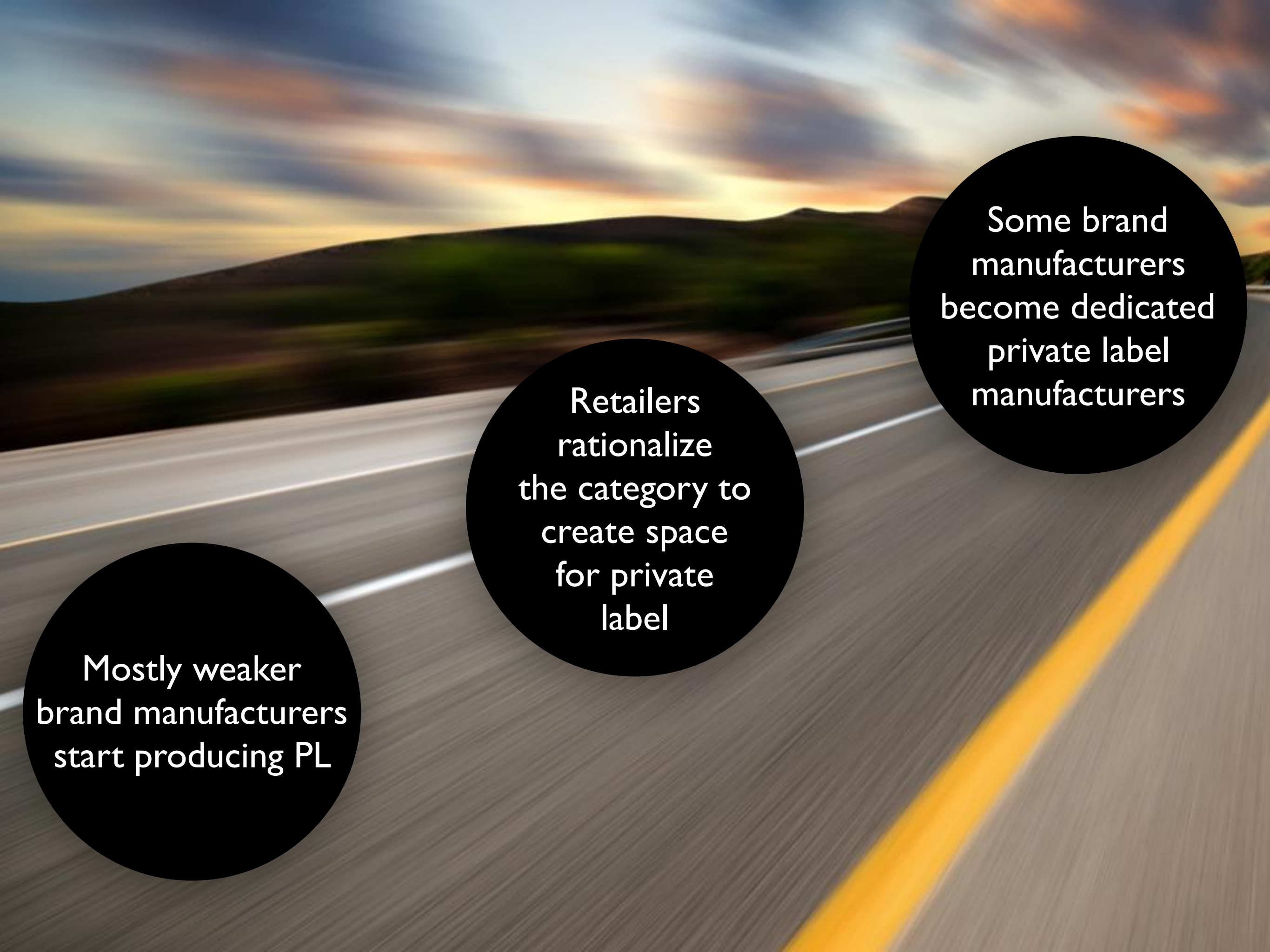






BUT PRIVATE LABEL CAME A LONG WAY





Mostly weaker
brand manufacturers
start producing PL

Retailers
rationalize
the category to
create space
for private
label

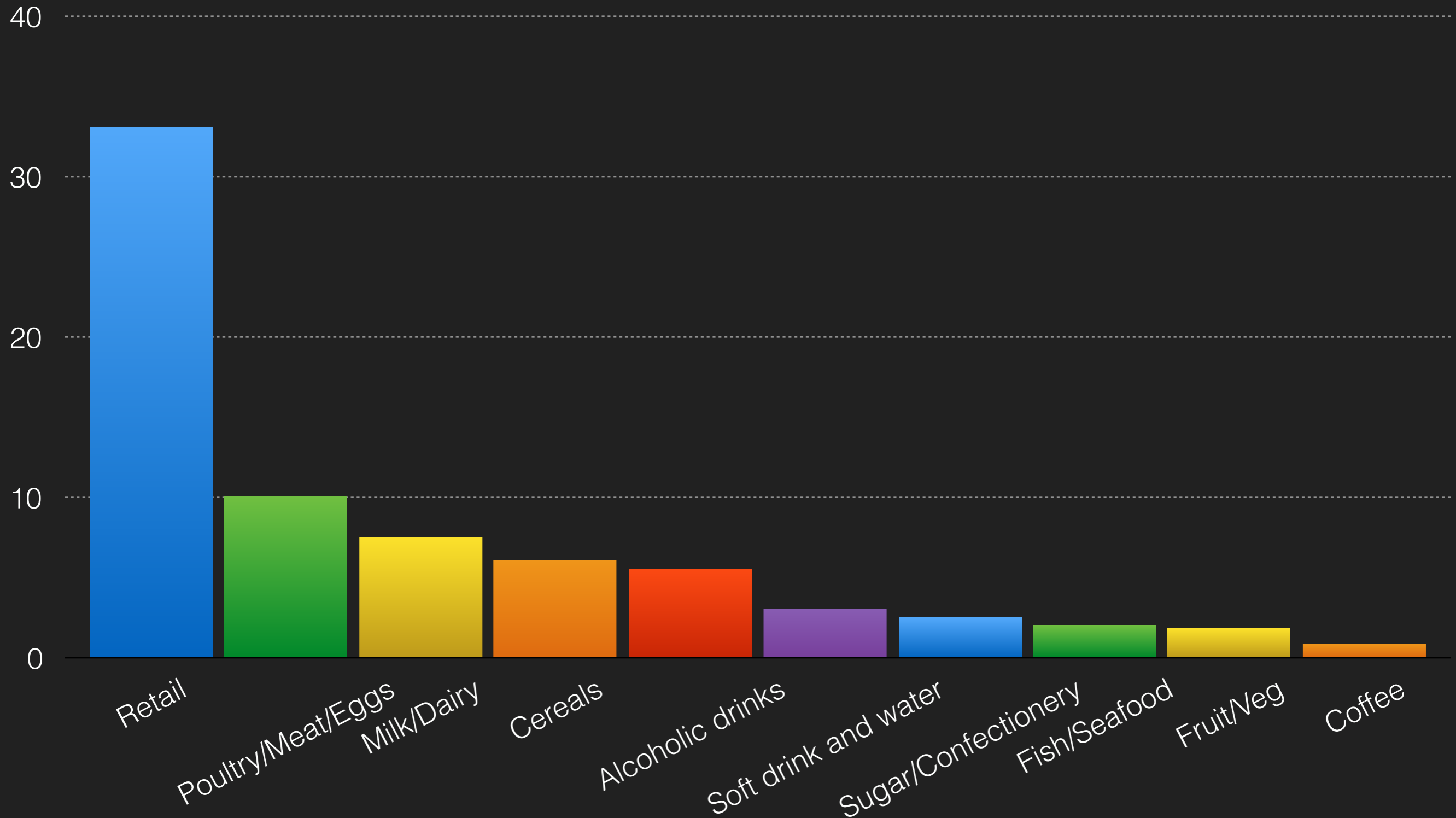
Some brand
manufacturers
become dedicated
private label
manufacturers



PRIVATE LABEL

THE RETAIL
PERSPECTIVE

CONCENTRATION: TOTAL MERGERS IN % DIVIDED PER SECTORS 2004-2012



source: Report on competition law enforcement and market monitoring activities ECN 2012

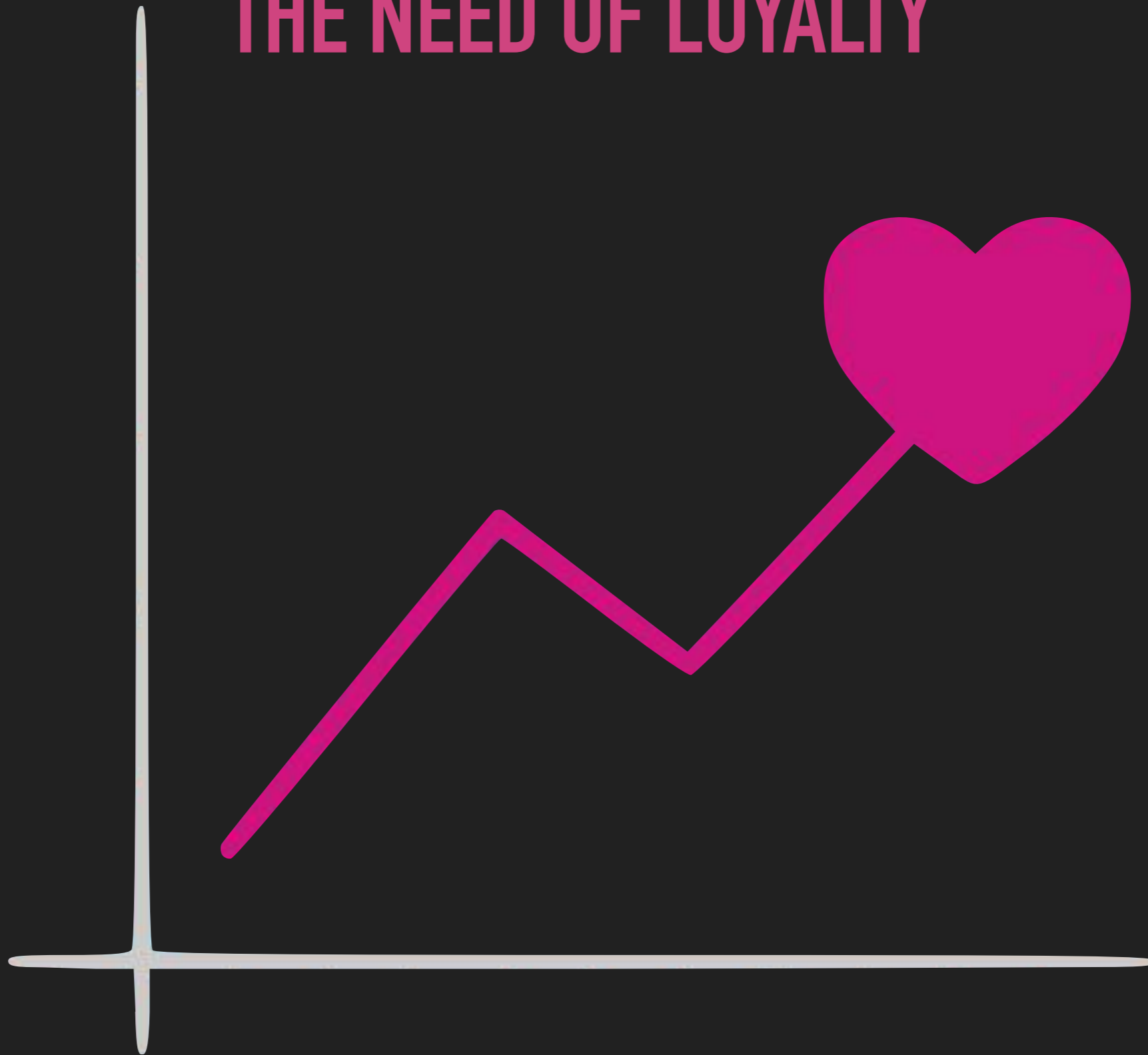
WE NEED PRIVATE LABEL



A background of a grid of white spheres, with one sphere in the foreground being orange. The text "THE NEED OF DIFFERENTIATION" is overlaid in orange.

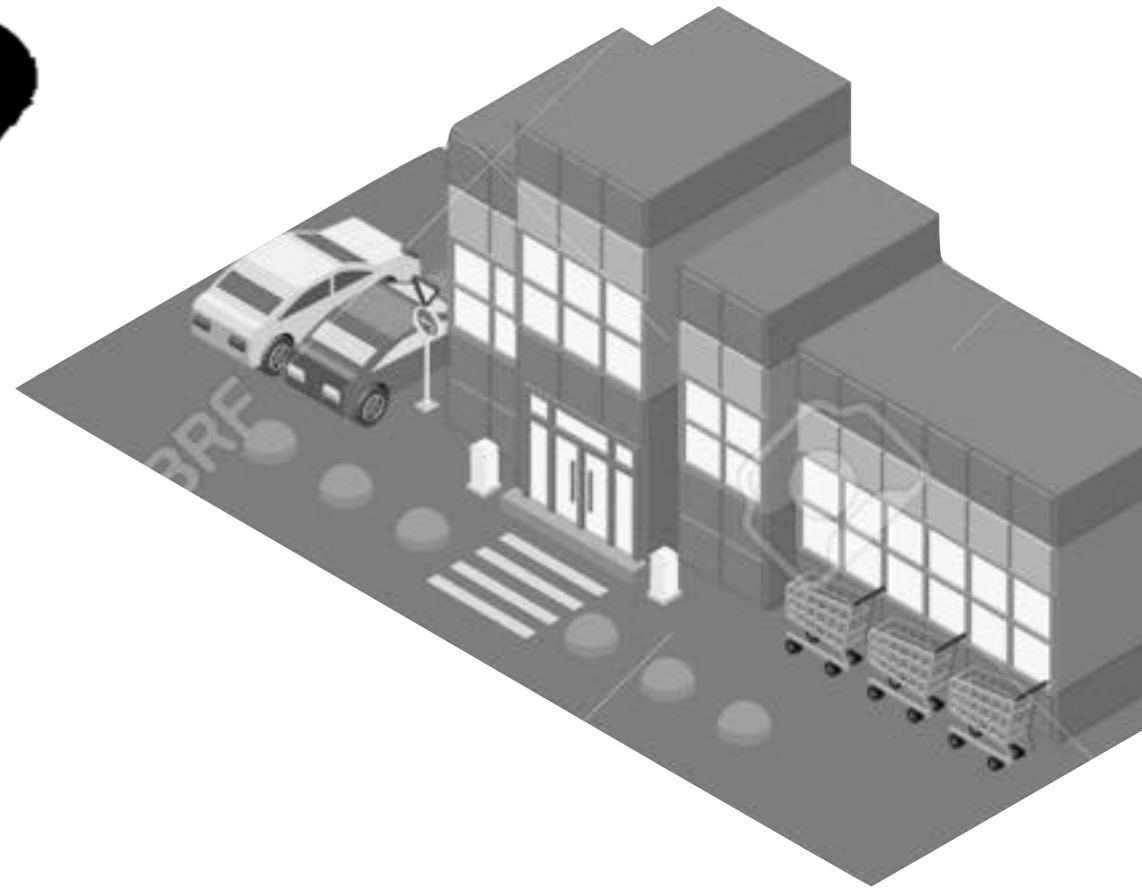
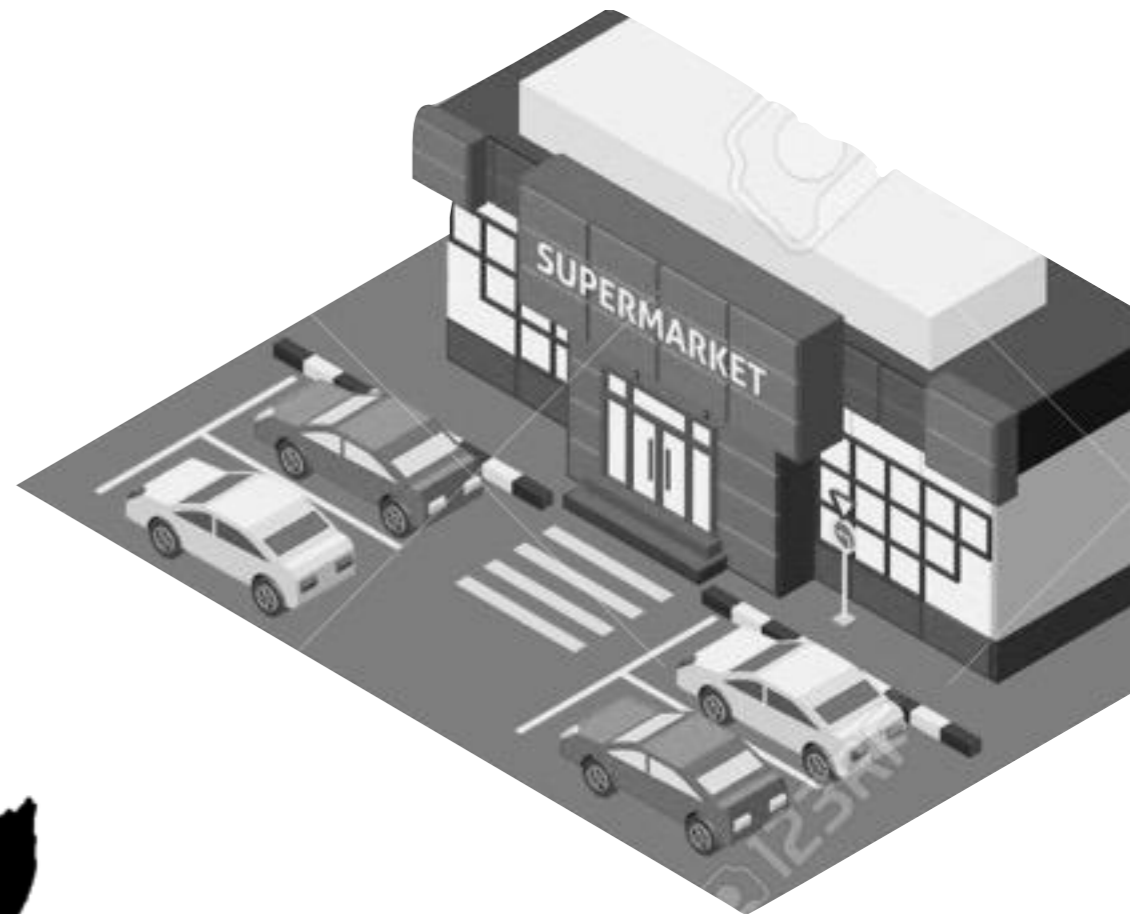
THE NEED OF DIFFERENTIATION

THE NEED OF LOYALTY





vs



THE NEED OF MARGIN

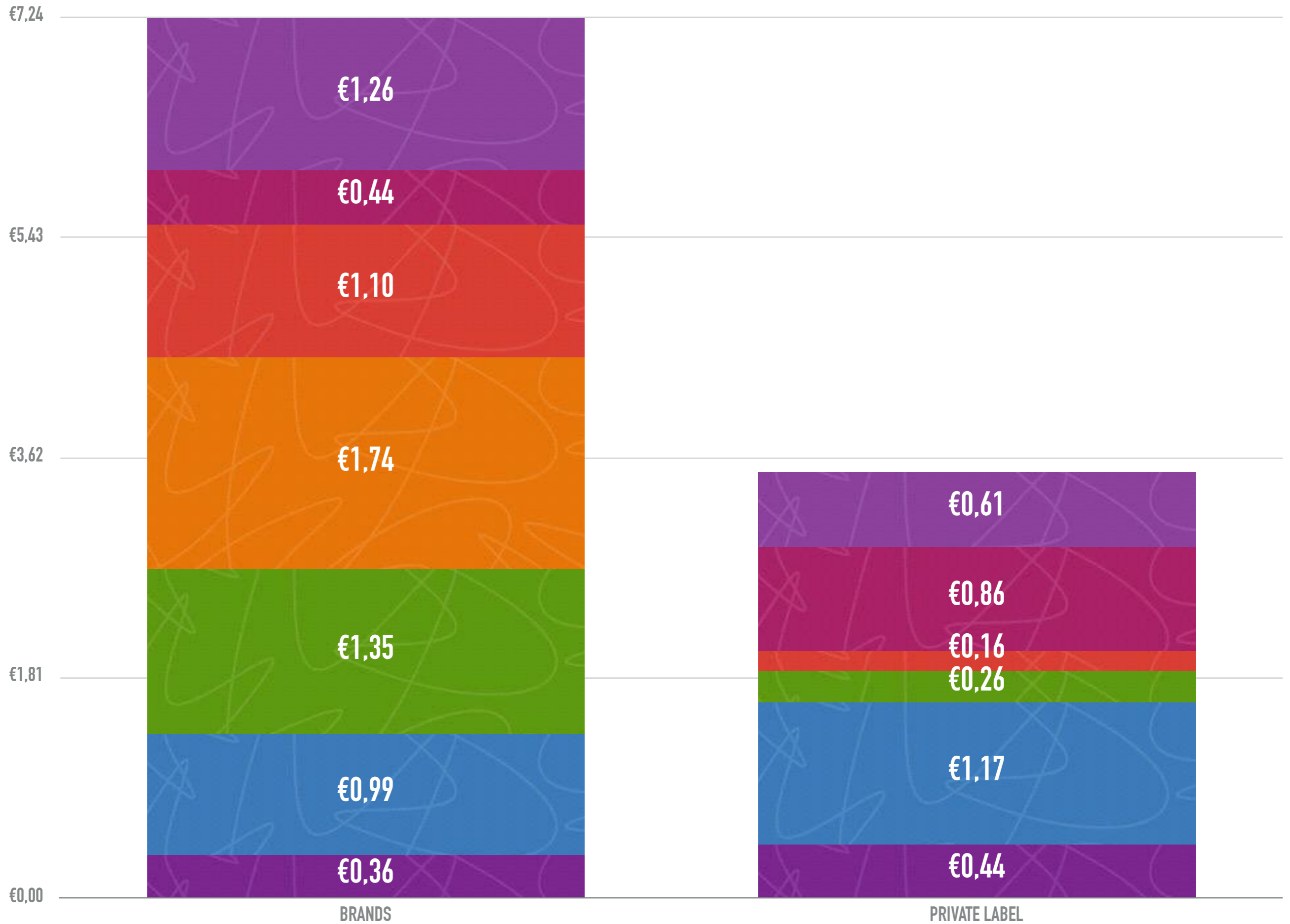


7,25€



3,50€





BRANDS

PRIVATE LABEL





THE NEED TO DRIVE INNOVATION

A close-up photograph of water splashing, with bright green highlights and white foam, set against a dark background.

63% LIKE NEW

A landscape photograph featuring a single, large, leafy green tree standing in the center of a dirt path that splits into two directions. The path is flanked by fields of purple flowers under a cloudy sky.

56% SWITCH

A background of various white social media icons on a green field, including question marks, speech bubbles, musical notes, and thumbs up. A person's face is visible at the bottom, looking upwards.

49% TELL OTHERS

THE NEED OF NICHE MARKETING













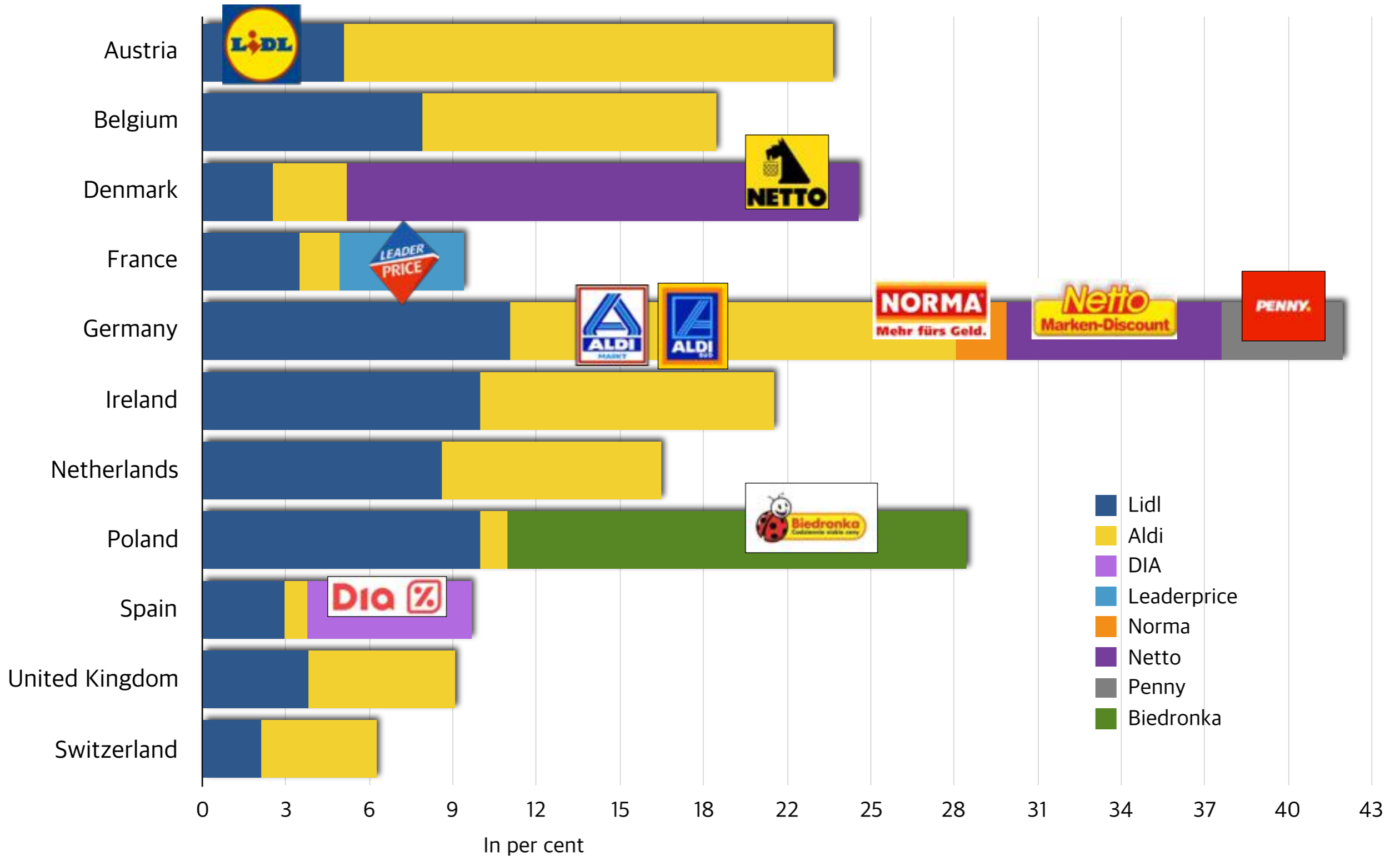


PREMIUM STRATEGY

HARD

DISCOUNTERS

MARKET SHARE OF DISCOUNT RETAILERS IN EUROPE





63 BN €

66 BN €

18 BN €



AVERAGE 1500 SKU'S



**FROM 3000 TO
40 000 SKU'S**

MORE PRODUCTS IS BETTER CHOICE

LESS PRODUCTS IS MORE SATISFACTION







60% SHOPPERS

3% CONVERSION

24 vs 6



40% SHOPPERS

30% CONVERSION



**“ TOO MUCH FREEDOM
INHIBITS CHOICE.
CONSTRUCTIVE
NARROWNESS
CLARIFIES CHOICE. ”**

Walter Darby Bannard

**SOMETIMES YOU NEED TO CHANGE THE OUTSIDE
TO GET PEOPLE TO DISCOVER THE INSIDE**

A black illuminated sign for 'Deluxe Restaurant'. The sign features a light fixture at the top center. The word 'Deluxe' is written in a large, white, cursive script font. Below it, the word 'RESTAURANT' is written in a smaller, white, sans-serif, all-caps font. The background is dark, and the sign is illuminated from within, creating a bright glow around the text and the light fixture. The background shows a blurred building facade with windows and some greenery at the bottom.

Deluxe

RESTAURANT

Call 020 777 5419



Source: Kantar WorldPanel - 12 weeks 2016



Source: Kantar WorldPanel - 12 weeks 2016

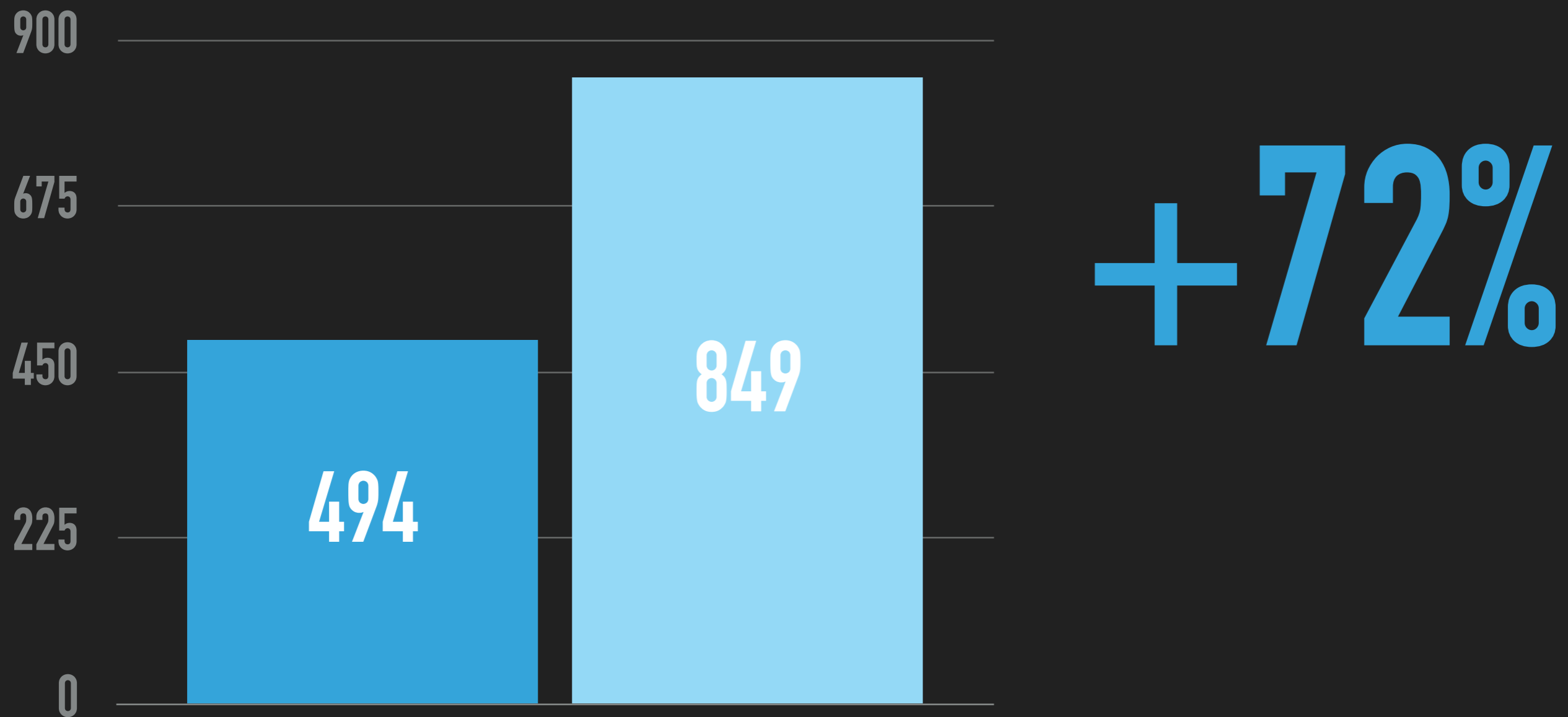


WHY AND HOW

GO PREMIUM

NUMBER OF PEOPLE WITH ANNUAL INCOME > US\$28'000 GLOBALLY

■ 2005 ■ 2015



Source: UNIDO, WIDER, World Bank, Nestlé F&C

LARGER PERCENTAGE OF POPULATION:

BETTER EDUCATED

MORE SOPHISTICATED

MORE DISCERNING

MORE TRAVELLED

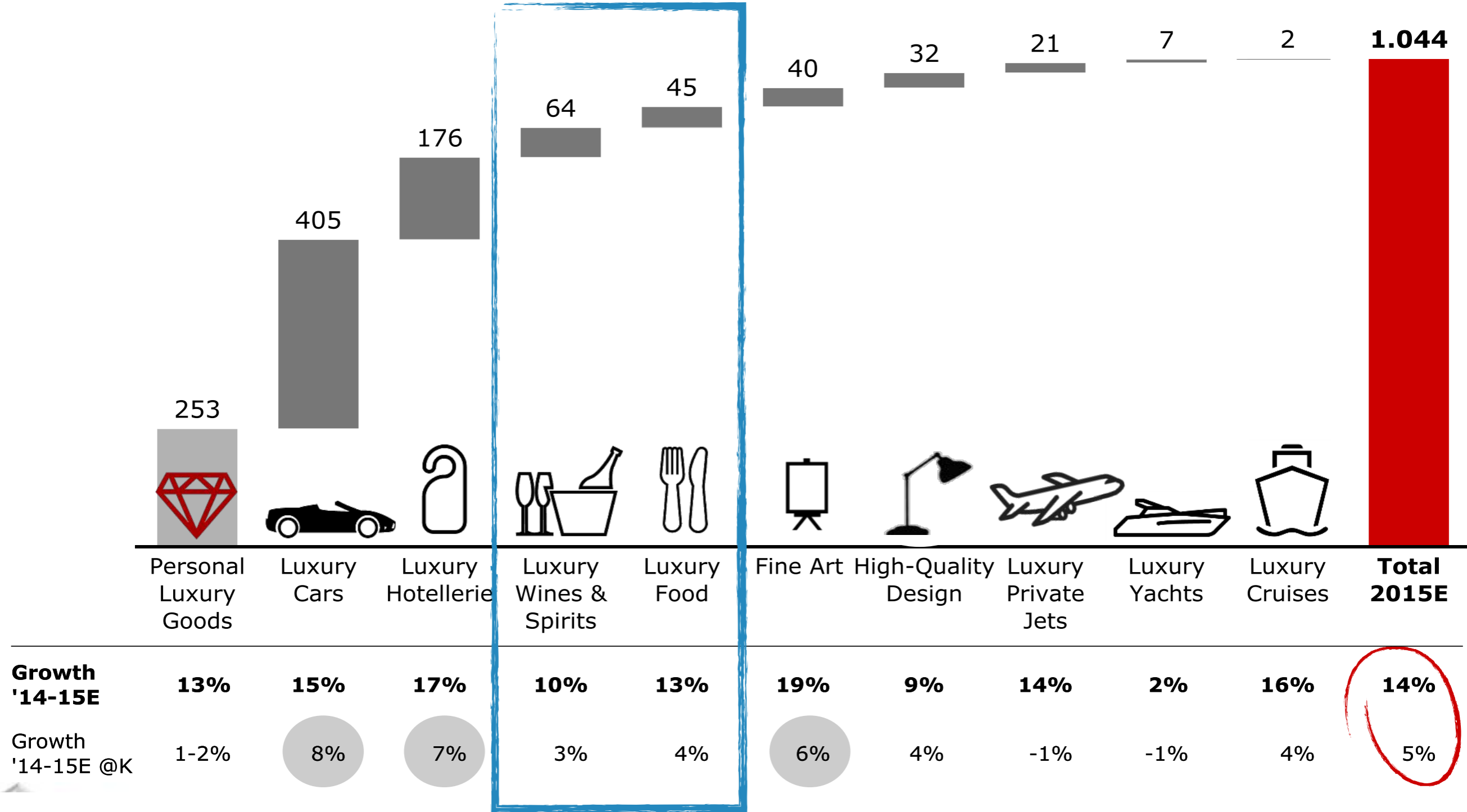


PREMIUMISATION
BETTER IS BETTER



ECONOMISATION
GOOD IS ENOUGH

WORLDWIDE LUXURY “MARKET OF THE MARKETS” (2015E|€B)



Source: Bain and Company 2015 World wide market monitor



EMOTIONAL

FUNCTIONAL

TECHNICAL

THE SEVEN KEYS AREA

1

**SPECIALIST
PRODUCTION**

2

**SPECIALIST
BENEFITS**

3

**SENSORY
APPEAL**

4

**FORMAT AND
SHAPE**

5

SUSTAINABILITY

6

UNIQUENESS

7

**OCCASION AND
RITUAL**



PHOTOGRAPHY BY KEVIN WATSON

IT'S RELATIVE











IT'S ALL CONNECTED

ACROSS THE WORLD

ACROSS THE STORES

WITHIN THE STORE



ALDI NEW CONCEPT KIRCHSEEON



Kasse 4

COFFEE 
TO GO

Coffee hoch³
Aroma zum Mitnehmen





EDEKA NEW CONCEPT HIEBER





vegan

- Garnussplattchen 24,90 €
- Curry Joghurt 24,90 €
- mus versch. Sorten 18,90 €
- ganz Bällchen 0,29 Stk
- ganz Hamburger 1,19 Stk

bar

vegan
Hamburger
1,19 €



veggie bar

LA GRANDE EPICERIE PARIS







LA GRANDE EPICERIE PARIS
LE VINAIGRE
DE VIN ROUGE
VIEILLI 12 MOIS
EN FUTS DE CHÊNE
250ML

LA GRANDE EPICERIE PARIS
LE VINAIGRE
DE VIN ROUGE
VIEILLI 12 MOIS
EN FUTS DE CHÊNE
250ML

LA GRANDE EPICERIE PARIS
L'HUILE D'OLIVE VIERGE EXTRA
500ML

LA GRANDE EPICERIE PARIS
L'HUILE D'OLIVE VIERGE EXTRA
500ML

LA GRANDE EPICERIE PARIS
L'HUILE D'OLIVE VIERGE EXTRA
500ML

LA GRANDE EPICERIE PARIS
LA MAYONNAISE
À LA TRUFFE NOIRE
180G

LA GRANDE EPICERIE PARIS
LA MAYONNAISE
À LA TRUFFE NOIRE
180G

LA GRANDE EPICERIE PARIS
LA MAYONNAISE
À LA TRUFFE NOIRE
180G

LES TRONNETTES DE LA MORT
450G

LE MÉLANGE FOUGESTIER
500G

LES GIBOLLES
550G

LES SANDINES
1200G

LE MIEL
1200G

LA VINAIGRETTA
À LA TRUFFE
300ML

L'HUILE D'OLIVE
VIERGE
À LA TRUFFE
100ML

LE VINAIGRE
DE VIN
NOIR À LA TRUFFE
300ML

L'HUILE
D'OLIVE
VIERGE
EXTRA
250ML

L'HUILE
D'OLIVE
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LES TRONNETTES DE LA MORT
450G

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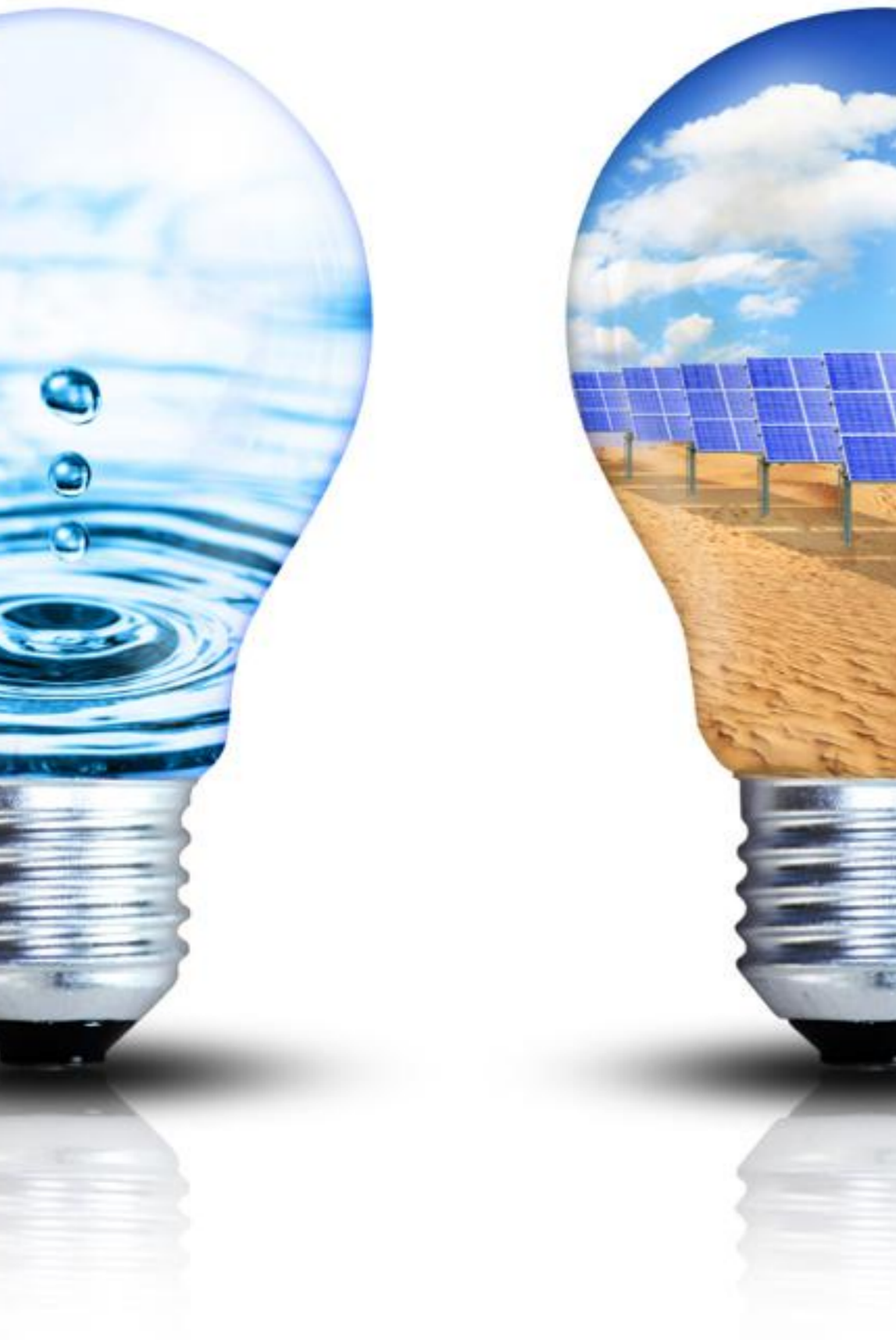
LES TRONNETTES DE LA MORT
450G

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450G



OUR ADVISES TO

CROSS THE BORDERS
WITH PRIVATE LABEL

THINK LONG TERM





CONTINUE TO DO THE BASICS

BUT DO THEM WELL!

A person's hands are shown holding a glowing digital interface. The interface is composed of various icons and data visualizations, including person silhouettes, bar charts, a globe, and search icons. The background is dark and slightly blurred, showing the person's face and hands. The overall aesthetic is futuristic and data-driven.

SHAPE THE FUTURE

BEFORE IT SHAPES YOU

Managing Private Labels

iplc

international private label consult

The Retailer Brand Specialists

REMY MEDINA

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THANKS