



Noel Keeley  
Managing Director  
Musgrave Wholesale Partners

# Musgrave Group

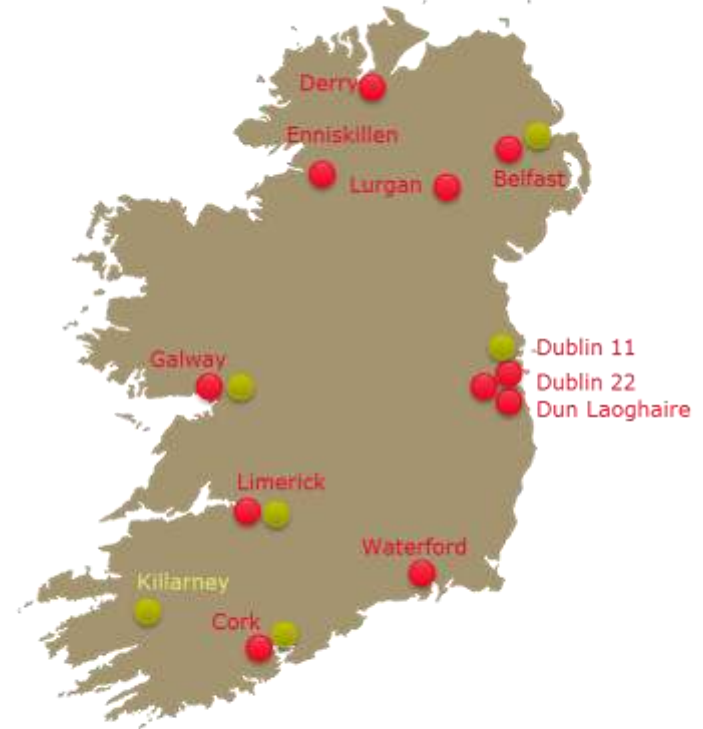
MUSGRAVE  
WHOLESALE PARTNERS

ESTD 1876  
**MUSGRAVE**  
GROUP

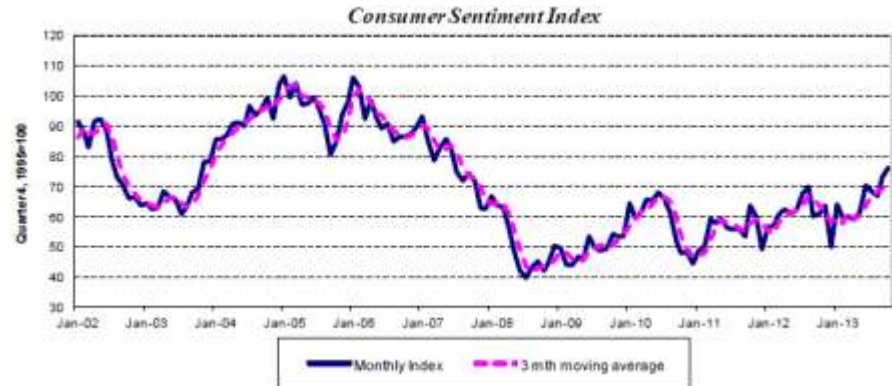
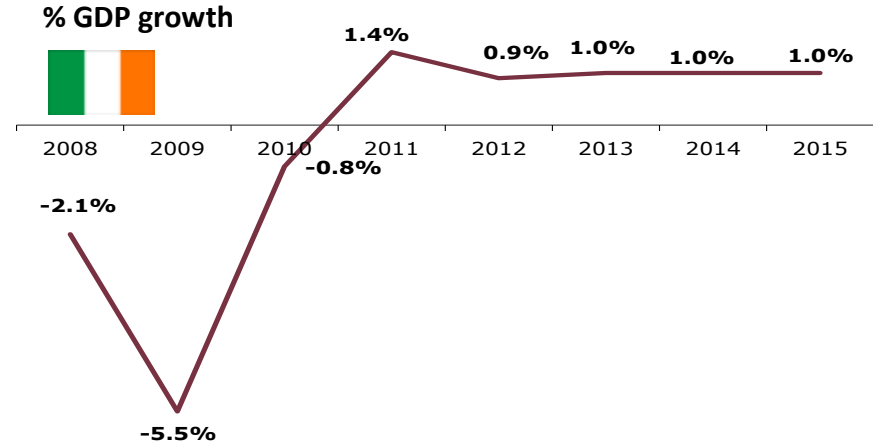
€4.9bn Turnover

**MUSGRAVE**  
WHOLESALE PARTNERS

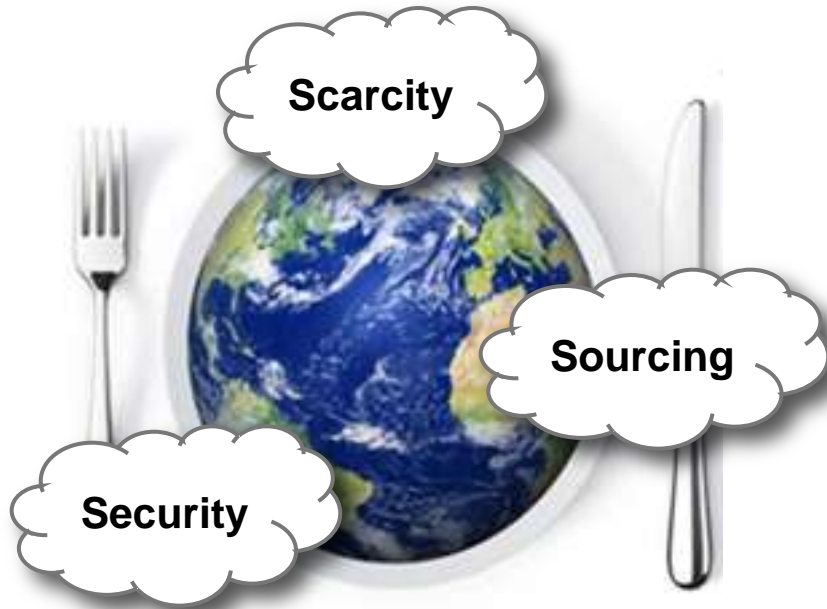
€600m Turnover



# Working in the New World



# Global Challenges – Local Trends



# Winning in the New World 2013



# Musgrave Wholesale Partners in the Past



***Daybreak***

MUSGRAVE  
**Food**Services

MUSGRAVE  
**Market**Place



# Our Vision

To be the  
**leading** wholesale brand in the  
markets in which we compete,  
the **brand of choice** for  
independent **Retail and  
Foodservice** businesses,  
recognised as being different &  
better and easy to do  
business with.

# Musgrave Wholesale Partners Today

**MUSGRAVE**  
WHOLESALE PARTNERS

## In Branch



## Online



## Delivered





# Musgrave Wholesale Partners Today



Growing at 5%  
ahead of the  
market



Strong sales growth

55,000 customers

Nationwide Presence

# Musgrave Wholesale Partners Today

MUSGRAVE  
WHOLESALE PARTNERS



11 Branches & 2 CDC's



+300 Symbol Stores



Over 29,000  
Foodservice Customers



Selling Over  
12,000 Products



>100 Sales & Customer  
Service Teams



Dedicated Wholesale  
Trading Team

# Focused on Growth

## Core Target Customers...



Hotels



Casual Dining



Nursing Homes



Food to GO



Fastfood



Asian



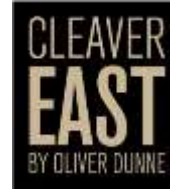
Pubs



Mid Tier  
Restaurants



Café's



# Our Success in Foodservice

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WHOLESALE PARTNERS



>10% IOI Foodservice  
Market Share and growing



+10% Customer Growth  
+7% Footfall Growth



+17%  
Own Brand Growth

# Winning in the New World 2013



# Working Together to Win

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WHOLESALE PARTNERS

Increase  
Chilled &  
Frozen  
customer  
loyalty



Customer  
Participation Growth  
**+7.8%**  
Driven by Beef, Seafood,  
Fruit & Veg and Dairy

Increase  
sales of  
Alcohol and  
Non Food



Customer  
Participation Growth  
**+8.5%**  
Driven by Pubs,  
Restaurants & Hotels

# Working together to win – MarketPlace Waterford

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WHOLESALE PARTNERS

- Opened Oct '12
- Key Growth Drivers
  - Regional approach
  - Liquor & Chill/Freeze Range Extension
  - Increased Loyalty from Existing Customers
  - Increased Sales Expertise



Sales +22%



# Working together to win – VFI

MUSGRAVE  
WHOLESALE PARTNERS

- 4,000 members
- Key Growth Drivers
  - Liquor, Food & Non-Food Focus
  - Flexibility of Cash & Carry Model
    - Buy as you need
    - No minimum Order Quantities
    - Splits versus Case Quantities
  - Menu Development & Expertise



Sales +11%

# Musgrave MarketPlace Brand Vision

MUSGRAVE  
WHOLESALE PARTNERS



Deliver Strong  
Topline Growth  
Annually  
through organic  
growth,  
geographic  
expansion &  
acquisition



# First for Value



*Offering the best overall VFM within the market*

- Everyday low prices
- 8 week promotional cycle
- KVI bestsellers price matched or cheaper
- WOW Sales
- Save when you buy in bulk
- Switch & Save





# First for Choice

*The One-Stop-Shop for all our customers' wholesale needs*

- Over 14k products
- 1500 chilled and frozen
- Market leading on ambient
- Develop meat, liquor, FTG & bakery
- 500+ Own Brand products



# First for Service

*On time & in full, every time is what our customers need*

- Voice Pick implemented
- Order Fill Rates 99.6%
- In bound service level 95.5%
- Wholesale Excellence
- Comprehensive customer support



# Omni Channel



*Ensuring our customers have a seamless brand experience at every interaction*

- Full omnichannel capability:
  - Collect
  - Nationwide tri-temp delivery
  - Online webshop
- Richer customer data
- Weekly e-mail to 35k customers
- Mobile, Superscan, Click & Collect



# In Summary

- Large family owned Irish business
- Difficult economic climate
- Easier to do business with us
- Focus on the basics – value, choice & service
- Continued growth
- Working together
- Winning through omni channel & innovation