



CONFLICTING STRATEGIES FOR PROFITABLE GROWTH

UNDERSTANDING THE STRATEGIC DILEMMAS

30TH NOVEMBER & 1ST DECEMBER 2004 • LONDON, UNITED KINGDOM

The CIES Marketing Forum 2004

The Global Food Retail Marketing Forum

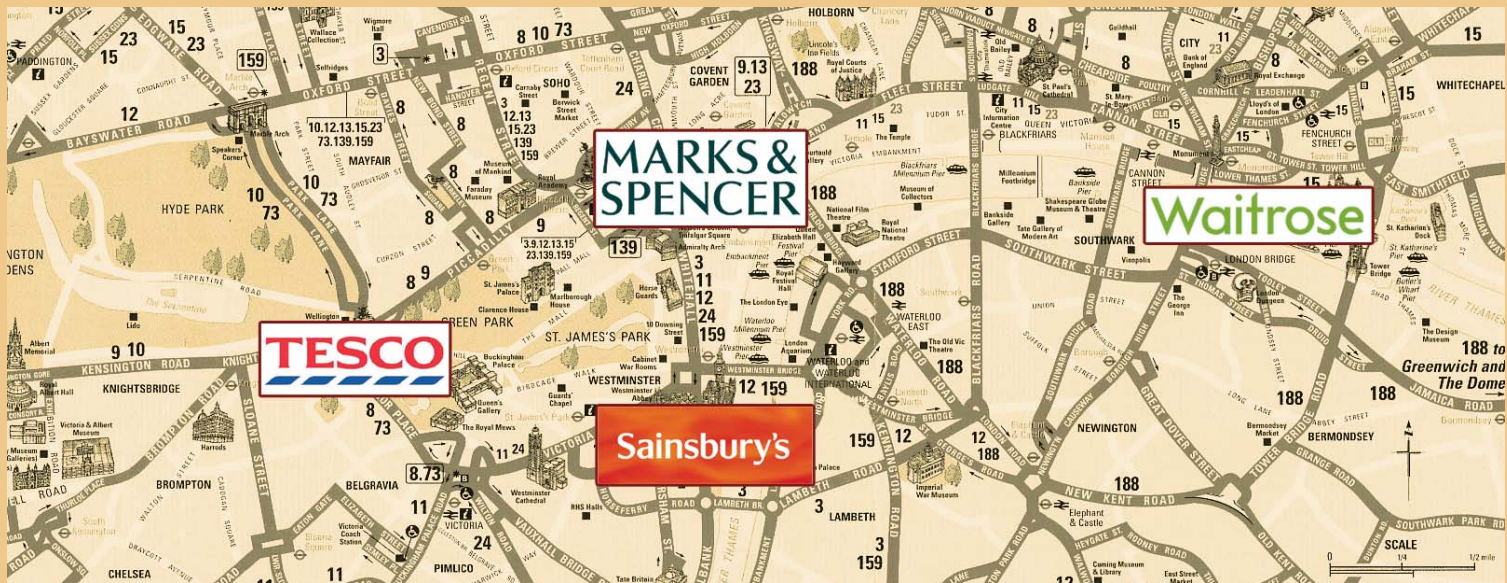


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MONDAY 29th NOVEMBER 2004

13.00-19.00 DISCOVERY OF THE BRITISH RETAIL SCENE

London has a wide variety of new store formats, innovative products, competitive price offerings, envied private label products and a wide range of non-food assortments. Take part in the CIES store tour programme and find out how the British retailers are satisfying their consumers. Meet with the store managers of Marks & Spencer, Sainsbury's, Tesco and Waitrose to learn how they distinguish themselves in this highly competitive market. The tour is optional and offered at an additional fee.



TUESDAY 30th NOVEMBER 2004

9.00-9.15 Welcome to the CIES Marketing Forum

Mark Price, Director of Selling and Marketing, **Waitrose**, United Kingdom & Chairman of CIES International Committee on Marketing

9.15-9.30

Introduction to Conflicting Strategies for Profitable Growth by Conference Chairman

Charles Waldman, Senior Affiliate Professor of Marketing, **INSEAD**, France

OPENING KEYNOTE ADDRESS

9.30-10.00

Profit or Profitability - creating a sustainable business

Sir Stuart Hampson, Chairman, **The John Lewis Partnership**, United Kingdom

The John Lewis Partnership is one of the UK's top ten retail businesses with 26 John Lewis department stores and more than 168 Waitrose supermarkets. It is also the country's largest employee cooperative with over 60,000 staff. Each member of staff is a Partner in the company and profits are shared each year.

INTERPRETING CONSUMER TRENDS & DEVELOPMENTS

10.00-10.30

The Schizophrenic Shopper Reality

A growing number of shoppers are surfing the fragmentation of the retail offer and display behaviors that go against all marketing logic.

Jean-Jacques Vandenheede, Vice President Europe Retailer Services, **ACNielsen**, Belgium

10.30-11.15

Coffee Break

CIES Marketing Forum 2

FOR PROFITABLE GROWTH • UNDERSTANDING

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- 11.15 - 11.45 **How Can Retailers Use Consumer Information?**
Clive Humby, Chairman and Co-founder, **dunnhumby**, United Kingdom
- 11.45 - 12.15 **Leveraging Customer Insights – The CIES Marketing Study**
Armelle Carminati, Managing Partner, Retail Europe, **Accenture**, France
Bridget Jackson, Partner, **Accenture**, United Kingdom
- 12.15-12.30 **Debate Session on Interpreting Consumer Trends & Developments**
- 12.30-14.00 **Lunch with topic tables**

THE RETAILER'S VIEW - BETTER RECIPES FOR GENERATING GROWTH

- 14.00-14.30 **Winning Strategies in a Local Market**
How a local player resists the international giant.
Xavier Alomar, Marketing Director, **Caprabo**, Spain
The Caprabo Group is a family-owned company operating primarily in the region of Catalonia with more than 40 years of experience in the food business.
- 14.30-15.00 **Pick 'n Pay's Recipe for Generating Growth**
Sean Summers, CEO, **Pick 'n Pay Retailers**, South Africa
Pick 'n Pay is one of the leading South African food retailers with a strong commitment to social responsibility.
- 15.00-15.40 **Corporate-owned vs. franchisee-owned - What are Benefits and Trade-offs?**
Paulo Goelzer Ph. D., President IGA Institute, CLO,VP International, **IGA, Inc.**, USA
IGA is the world's largest voluntary supermarket network with sales of more than \$21 billion annually worldwide, and over 4,000 Hometown Proud Supermarkets in 48 U.S. states and 40 countries.
Willy Van Daele, Vice President Wholesale, **Delhaize Benelux**, Belgium
The Delhaize Group was founded in Belgium in 1867 and operates food supermarkets in North America, Europe and Southeast Asia.
- 15.40-16.00 **Debate Session on the Retailer's View – Better Recipes for Generating Growth**
- 16.00-16.45 **Coffee Break**

THE IDEAL MIX BETWEEN STORE BRANDS AND NATIONAL BRANDS?

- 16.45 - 17.05 **The Store Brands Recipe**
Are sophisticated brands the solution for conflicting strategies for profitable growth?
Steve Kneepkens, Director of Business Development, Sainsbury's Account, **Daymon Associates**, United Kingdom
Daymon Worldwide is an international company specialising in the sales and marketing of Private Label consumer products.
- 17.05- 17.35 **The National Brands View**
Changing Channel Dynamics - Is there room for all of us?
Guest Speaker
- 17.35- 17.55 **Debate Session on the Ideal mix between Store Brands and National Brands**
- 17.55 - 18.15 **Wrap up by Conference Chairman**

19.00 **FLIGHT ON THE LONDON EYE FERRIS WHEEL AND DINNER CRUISE ON THE THAMES**

An evening of fun and networking with fellow CIES members.
Join us for a unique London entertainment experience. Begin the flight with canapés and Champagne served within your private capsule as you soar above the city on the London Eye Ferris Wheel. The higher the wheel soars, the more celebratory the experience becomes, and you will enjoy the breathtaking views from the heart of the city. Your flight will be followed by a dinner cruise on board the Silver Fleet vessel. Enjoy the sights of London by night while cruising down the river Thames.



2004

THE STRATEGIC DILEMMAS



WEDNESDAY 1st DECEMBER 2004

PEOPLE & SERVICE - THE DILEMMAS WE FACE

9.00 - 9.15 **Welcome by Conference Chairman**

9.15 - 9.45 **Pride in People**
How to emotionally connect with your people.

Philip Williamson, Chief Executive, **Nationwide Building Society**, United Kingdom
Nationwide Building Society offers a range of retail financial services. Unlike banks it has no shareholders and the members are effectively its owners.

9.45 - 10.15 **Managing People the Innocent Way**
Meet the firm where hugs and kisses are a reward practice and £2000 baby bonus shows it's not afraid to stand out from the crowd.

Adam Balon, Co-founder & Commercial Director, **Innocent Drinks**, United Kingdom
Innocent Drinks sells over 30,000 all-natural smoothies per day and supplies 4,000 retailers in the UK and Ireland.

10.15 - 11.00 **Coffee Break**

11.00 - 11.30 **Retail is a People Business**

Guest Speaker

11.30 - 11.50 **Debate session on People and Service – The Dilemmas We Face**

CONFLICTING STRATEGIES IN ADVERTISING

11.50 - 12.30 **Advertising in Food Retailing – A Panorama of Strategies and Tactics**

Steve Hastings, Planning Partner, **Isobel Advertising Company**, United Kingdom

12.30 - 14.00 **Lunch with topic tables**

BRAND TRANSFORMATION

14.00 - 14.40 **Have Retailers succeeded in becoming a brand of their own in order to win the battle for the consumer?**

Guest Speaker

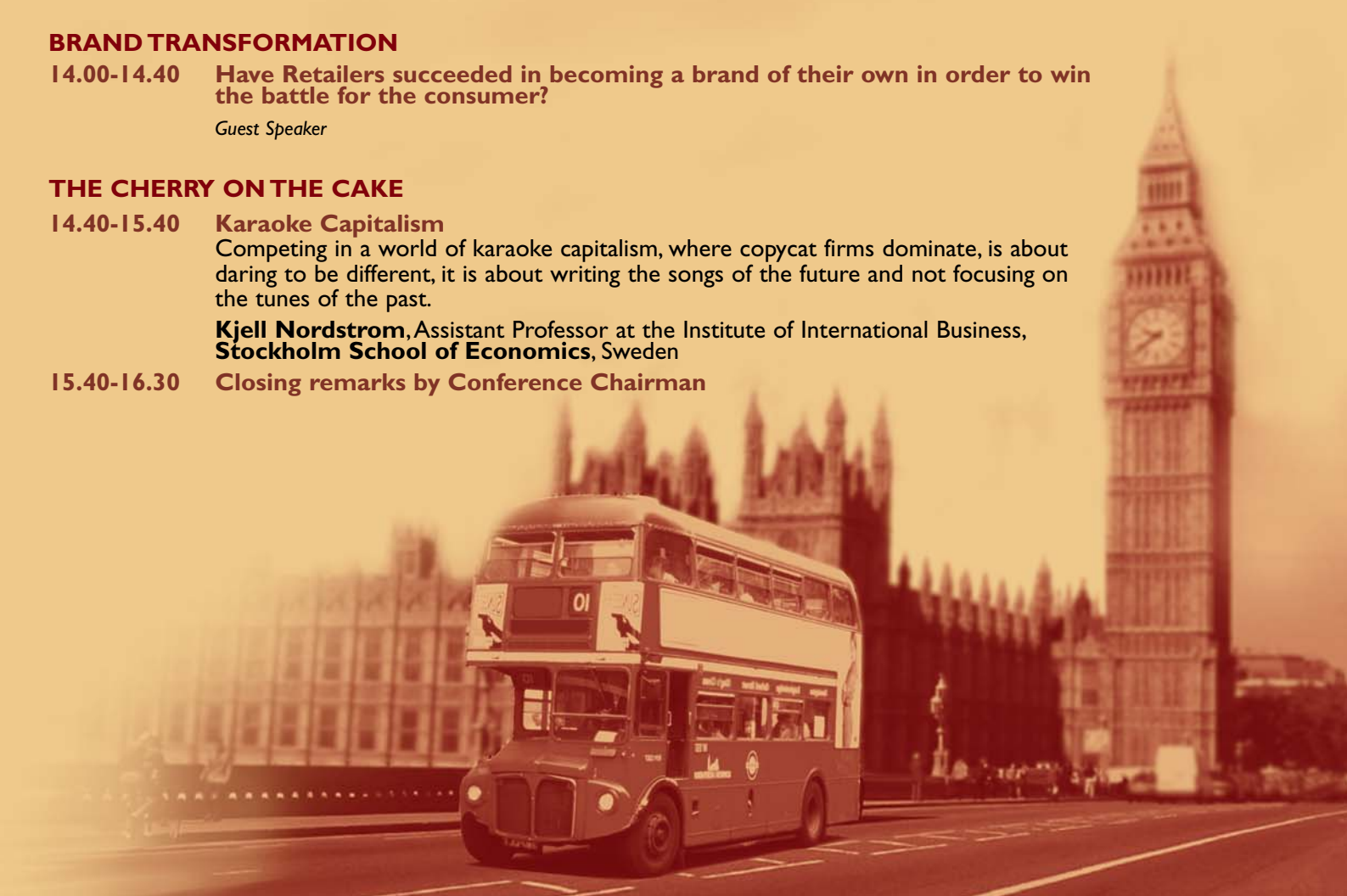
THE CHERRY ON THE CAKE

14.40 - 15.40 **Karaoke Capitalism**

Competing in a world of karaoke capitalism, where copycat firms dominate, is about daring to be different, it is about writing the songs of the future and not focusing on the tunes of the past.

Kjell Nordstrom, Assistant Professor at the Institute of International Business, **Stockholm School of Economics**, Sweden

15.40 - 16.30 **Closing remarks by Conference Chairman**





CIES CONFERENCE HIGHLIGHTS

The annual CIES Marketing Forum is a must for senior marketers in the food retail sector.

Your experience at the Marketing Forum will be rewarding, thought-provoking and challenging. Our comprehensive programme offers you added-value in a number of areas:

- **Forum of Debate on Top-of-Mind Issues** - This year's event will look at the question of "Conflicting strategies for profitable growth". What are the dilemmas faced in food retailing today? What are the trade-offs that we have to make? Our debate sessions will enable you to exchange views on these issues. The case studies presented give you insight into dilemmas faced by others in the industry. Pragmatic retailer case studies are the trademark of CIES.

- **Networking Opportunities** - *This forum is one of a kind!* It is the meeting place for marketers and is the only global food retail marketing forum. By joining us in London you will become part of a unique club of Marketing Executives.

- **Discovery of the British Market and Local Business Practices** - The StoreTour Programme is a fantastic opportunity to discover the UK retail scene and see the challenges that UK retailers face today. The sheer diversity of offer in London makes the British consumer more and more demanding. Talk to some of the UK's leading retailers to see how they make their consumers shopping experience unique. The programme includes visits to Marks & Spencer, Sainsbury's, Tesco and Waitrose.

- **CIES Excellence** is a result of 50 years of bringing together retailers and suppliers to discuss top of mind issues in retailing. Our experience offers you a guarantee of quality. CIES is neutral - our programmes are developed by CIES members for CIES members.

The CIES Marketing Forum 2003 in Amsterdam was attended by senior marketers from over 30 countries. Here is what they had to say about their experience:

- *"I had a very interesting and inspiring two days, so thank you and CIES for that!"*
- *"Thank you very much for the invitation to attend your forum. I was very impressed at every turn and felt fortunate to have been invited."*
- *"I was pleasantly surprised with the presentations. They were full of real data, both of the industry in general and of the specific case studies."*
- *"Great variety of styles, high quality speakers."*
- *"Excellent forum to network and learn."*
- *"Yes it was a good conference with relevant topics to the industry at the moment."*
- *"Very well organised. Very high-level event. Good ambiance."*

WHAT IS CIES - THE FOOD BUSINESS FORUM ?

CIES - The Food Business Forum is the only independent global food business network. It serves the CEOs and senior management of 175 retailer and 175 supplier member companies, and their subsidiaries, in over 150 countries by:

- **Providing a neutral platform for knowledge-exchange, thought-leadership and networking.** CIES services are channelled through international conferences, benchmarking studies, publications and tailor-made member services. Current programmes include the Global CEO Forum, the World Food Business Summit, Future Leaders Programme and the functional areas of Marketing, Information Technology and Supply Chain Management.

- **Orchestrating positions and developing tools on key strategic and practical issues affecting the food business.** These top-of-mind issues are identified by our ten retailer-led committees and taskforces. Priority projects include the Global Food Safety Initiative and the Food Business in Society Initiative.

CIES - The Food Business Forum has been growing with the food business for over 50 years. Its strength lies in the active commitment of its member companies and its privileged access to key industry players. CIES retailer members alone generate over \$2,000 billion, employ 4.5 million people and operate close to 600,000 stores representing a total sales area of 160 million square metres.

For more information about CIES, please visit our website www.ciesnet.com

CIES - THE FOOD BUSINESS FORUM

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This conference targets those interested in learning about best practices in food retail marketing. The Marketing Forum is created for Senior Managers in Marketing, Sales, Merchandising, Customer Management, Strategic Planning, and Business Development. This programme has been developed for you by the members of the CIES INTERNATIONAL COMMITTEE ON MARKETING. The members of the committee are:

Chairman:

MARK PRICE, Director of Selling & Marketing, **WAITROSE LTD.**, U.K.

JONATHAN ACKERMAN, Marketing Director,

PICK'N PAY RETAILERS, South Africa

PHILIPPE BRUNELLI, Senior Vice President Marketing & Technical,

DELHAIZE LE LION, Belgium

ART DROGUE, Senior Vice President, Sales & Customer

Development, **UNILEVER BESTFOODS**, USA

ARNE ERIKSEN, Director, Research & Development,

NORGESGRUPPEN-MENY AS, Norway

PAULO GOELZER Ph. D., President IGA Institute, CLO, VP

International, **IGA, INC.**, USA

JOE GRIESHABER, Group VP, Perishables Merchandising &

Procurement, **THE KROGER COMPANY**, USA

PASCAL HOUSSIN, Senior Vice President, Sales and Customer Development, **KRAFT FOODS INTERNATIONAL**, U.K.

SHARON JESKE, Director, Specialised Management Programmes, **CIES-THE FOOD BUSINESS FORUM**

JULIE LYLE, Vice President, Corporate Marketing, **WAL-MART**, USA

HARVEY MC COY, Senior Vice President of Merchandising Services,

H.E. BUTT GROCERY COMPANY, USA

PAULA MURPHY, Commercial Manager, **SUPERQUINN**, Ireland

ANDRÉ TORDJMAN, Marketing Director, **AUCHAN**, France

JEAN-JACQUES VANDENHEEDE, Vice President Europe Retailer

Services, **ACNIELSEN**, Belgium

SANDER VAN DER LAAN, Executive Vice President Marketing &

Merchandising, **ALBERT HEIJN BV**, The Netherlands

CIES would like to thank the following companies for their generous support:

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For all information concerning registration and accommodation please contact, **LSO/CIES MARKETING FORUM LONDON 2004 Secretariat**
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For further enquires regarding the conference programme, please contact **Sharon Bligh** at **CIES - The Food Business Forum**
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For programme updates, practical information and on-line registration visit our conference website
<http://ciesmarketingforum2004.iso-intl.com>