Bonduelle Bienvenue : the All-Vegetable Showcase Store: A new outlet for the vegetable consumer

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I. Context and Issue

The French food industry is facing a particularly complex situation: market maturity; intensity of competitive confrontation; erosion of consumer confidence in the wake of successive food crises, etc. In addition, in a world that is increasingly more concerned with nutrition, Bonduelle, a French company specialising in the industrial processing of vegetables and the leader in the ready-to-eat vegetables, would like to become “the world reference in well-being in vegetables”, which means that Bonduelle’s business activities will be extended. Therefore, Bonduelle is currently testing a creative concept The All-Vegetable Showcase Store near its headquarters in Villeneuve d’Ascq (North of France). Christened Bonduelle Bienvenue, this multifaceted commercial space, is unique in the world (as it is entirely dedicated to canned vegetables) and is positioned as a response to changes in the consumer society. For Bonduelle, the idea is to design a complete brand experience and to create direct contact with the consumer via:

- **A Bargain Zone** (clearance products or discounted items), which corresponds to stagnant or declining consumer purchasing power;
- **A Products Zone**, dedicated to almost all products (French and foreign products) sold by the group in their four techniques (canned, frozen products, delicatessen and 4th range packaged salads\(^1\)). This space is for vegetable lovers who wish to discover the largest range of vegetable products not offered in retail outlets, and hence, enables the consumers to enrich their relationship with the brand due to the choice available;
- **An Information Zone**, which communicates on the Group’s values, the agri-business process, the nutritional benefits of vegetables, the Louis Bonduelle Foundation, etc. and also offers a unique, sensory and emotional consumer experience.

At the beginning of 2013, after two years of existence and initial promising results, Pierre Masse – Project Director at Bonduelle – and Sandrine Debreyne – Bonduelle Bienvenue Store Manager – would like to give new momentum to this new concept, which is 100% dedicated to Bonduelle vegetables and which is hybrid in nature, both a factory shop and a showcase store. To offer the consumers a complete brand experience by integrating the product and the place of distribution, is rich both in perspectives and in opportunities.

Therefore, they would like your help to develop the strategy they need to employ to ensure that their objective has the maximum meaning and content possible.

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\(^1\) This term designates ready-to-eat salads, i.e. washed, peeled and packaged in a plastic bag. Cf. Appendix 3.
II. Reflection and Assignment

To understand the multiple dimensions of the consumers and offer a shopping experience that allows a move from a simple “Place to Buy” to a “Place to Be”, Pierre Masse and Sandrine Debreyne would like you to consider how to establish a new link with the customer in order to strengthen brand relationship. Your experience constitutes a lever of strategic action.

How can the Bonduelle Bienvenue prototype be transformed into a new experiential space for the consumer and enrich the relationship with the Bonduelle brand?

What differentiating added value, either functional or emotional, would enable this concept to stand out from the traditional market sector? How can an atmosphere be built around the brand? How can the vegetable become less anonymous (raise public awareness of vegetables) and be made a more everyday product?

You have just been recruited as a marketing intern at Bonduelle. Your first mission consists in working on enriching the social experience offered by the Bonduelle brand to its customers through Bonduelle Bienvenue. In order to do so, you have been asked:

1. To reflect on the different missions of the store and the added value of Bonduelle Bienvenue;

2. To identify the preferred strategy to stage the Bonduelle brand and elaborate an action plan by making Bonduelle Bienvenue a unique brand experience. More specifically, you are asked:
   - How to make Bonduelle part of the consumer’s life and enrich the brand experience by encouraging interaction between consumers and community relationship?
   - Which decor should be proposed to dramatise the brand in line with its positioning and to encourage greater purchase?
   - Which story should be built around the brand to intrigue consumers and make them want to share its values?

You should answer the questions using specific and structured arguments in order to convince the company that your project is the one they should select.

Please Note: it is important to keep in mind that the objective of this concept is not to compete with the commercial sector and substitute Bonduelle’s existing distribution network, or even to hinder it, but to complement it by providing brand visibility and enabling an increase in Bonduelle’s market share within households.
III. Bonduelle: The regional cans have gone global

(Source: La Saga des Marques – La Voix du Nord – Hors Série May 2012)

A family business founded in 1853\(^2\), Bonduelle has risen in recent decades to become the world’s largest processed vegetable company (cf. Appendix 1: The Vegetable Market). In 2010-2011, its turnover reached €1.7 billion. In 2012-2013, for its 160 anniversary, this figure reached 7.3\% (i.e. €1.8 billion). For the fiscal year 2013-2014, Bonduelle expects a growth of 3\% to 5\% and expects a turnover of €3.5 billion by 2025.

Thanks to the expansion of its operations through internal and external growth (Cassegrain, Aliments Carrière - Artic Gardens brand -, France Champignon, Globus, etc.), it has become – with one single product, the vegetable – the only multi-technology food group in canning, frozen and specialised fresh products, which includes catering and 4th range salads (cf. Appendix 3: Bonduelle’s activities).

Mainly located in Western Europe, where it generates nearly 70\% of its turnover, it has gradually expanded its presence to markets with high growth potential such as Central and Eastern Europe (via the acquisition of factories in Hungary and Russia) and South America (opening a production site in Brazil).

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\(^2\) Cf. Appendix 2: Key Dates – From the Family Farm to the Global Group.
Bonduelle

Main Brands

22%

25%

% of turnover:

€327.7 m

€432.0 m

2010/11:

2010/11:

Turnover

Turnover

(No. 1 in France, Canada)

(No. 1 in Europe)

Bonduelle, Cassgrain

Main Brands

53%

% of turnover:

€915.9 m

€432.0 m

2010/11:

2010/11:

Turnover

Turnover

(No. 1 in France, Russia, Canada & Europe)

(No. 1 in France, Canada, N. 3 in Europe)

Bonduelle, Artic Gardens

Main Brands

22%

% of turnover:

€327.7 m

€432.0 m

2010/11:

2010/11:

Turnover

Turnover

(Delicatesse or 4th Range)

Fresh Produce

Frozen Vegetables

Canned Vegetables

Turnover on 30 June 2011: €1,726 m (+10.7%)
At the same time, the group consolidated its position in North America by acquiring four more factories in the USA in spring 2012.

A. Group Strategy

Bonduelle’s strategy can be summed up as follows: “The vegetable, all vegetables, only the vegetable”. The Group wants to make vegetables the future of food and become the reference of food well-being by processing vegetables in all its forms (canned, frozen, fresh, and prepared vegetables) in order to occupy the most retail shelf space possible. In order to become the nutritional partner of consumers, their mission is to make the vegetable available in terms of:

- **Availability**: like most brands, Bonduelle is facing the problem of ranking: no large or medium commercial outlet has the entire range of vegetables on its shelves due to lack of space; therefore, it is difficult for the consumer to visualise the breadth and depth of the offer of the four different product categories (canned, frozen products, delicatessen products and 4th range packaged salads) and moreover, mixing with competing brands (other national brands, private label products, discount brands, etc.). Purchased by two thirds of French households in only 1.7 shelf displays out of 4 on average, Bonduelle wants to enable consumers to access all of its products;

- **Price**: like fruits and vegetables, processed vegetables have the image of being expensive products, while their average selling prices is €1 or €1.30. Bonduelle’s objective is to feed the greatest number of people economically: “You do not feed the planet and its 9 billion inhabitants with organic food, what is more, organic food is a question of means and not of results” (Source: Interview with Christophe Bonduelle – Eco 121, n° 22 June 2012). This explains why organic food is not a central strategic issue even if the company produces organic food to satisfy consumer expectations. However, this does not mean that Bonduelle does not care about marketing healthy products: the company is even avant-garde concerning sustainable development and practice with the cultivation of its products with ecologically intensive agriculture.

- **Culinary Know-how**: the culinary knowledge of the French is diminishing; however, there are a lot of things one can do with good produce and a bit of training in order to transform a standard product into an appetizing one. Bonduelle wants to insight people to cook vegetables in all their various forms and help the consumer enjoy preparing and consuming vegetables. This requires education by teaching the consumer how to cook vegetables.

The desire to offer healthy vegetables has driven Bonduelle to commit itself to improve its quality standard. A nutritional charter was elaborated, the objective being to communicate clearly on the nutritional commitment of the brand in a transversal way. The technical aspects, nutritional claims and tables have all been standardised.

**Quality and creativity** are the two criteria employed to deploy their differentiation strategy on a highly competitive market. In fact, extensive agronomic knowledge and a high level of innovation enable the group to conserve its leadership position (cf. Appendix 4: 60 years of Innovation).

B. Brands

Bonduelle is a nominative brand. According to Christophe Château, Director of Communication of the Group, certain members of the family were against the use of their name as a brand name as they did not want their name binned after consumption. However, the sceptics were not listened to and the Bonduelle name appeared on the first cans in 1947. With hindsight, this well-rounded name, with the feminine –elle in the end has been very lucky; lucky also as it contains the adjective in French ‘bon’ (=good)...

Bonduelle has a reduced number of brands: Bonduelle, Cassegrain (premium products in France packaged in the famous rectangular can and represented by the emblematic personality of the rabbit character) and Arctic Gardens (vegetables processed in Canada). The Royal Champignon (France) brand was abandoned to give greater visibility to the main brand, Bonduelle, available in almost all varieties of vegetables and in all four categories.
Another brand is Bonduelle Food Service, dedicated to the catering sector.

The Bonduelle brand is recognised by 98% of French people and almost as many Europeans.

Bonduelle is also a major actor in distributor’s brand name vegetables. This double positioning – own brand/distributor’s brand – enables the group to ensure production volumes during crises and economic expansion.

C. Outlets / Customers

The main outlet for Bonduelle is the retail channel: mass distribution and local stores. In 2010-2011, the group made 74% of its turnover in this market.

However, at the beginning of the 2000s, the group started to diversify its consumer markets and launched itself in the ‘food service’, in other terms the supply of vegetables to the professional market, i.e. catering sector (cafeterias, hotel chains, fast food, restaurants, etc.) via its dedicated subsidiary: Bonduelle Food Service. Bonduelle has become number 1 in this channel in Europe.

Since 2005 Bonduelle has also supplied vegetables to the food industry, essentially processed products for the producers of prepared foods. In 2010-2011, the group made 7% of its turnover in this market.

Bonduelle’s turnover by distribution channel
D. Promotion

At the beginning of the 1950s, the brand started to promote its products first of all in its region. “Eat to become strong... but preferably Bonduelle’s quality canned food” could be read on blotting paper, exercise-book covers or team jerseys in the villages. A host of vans painted with the brand’s colours criss-crossed the region during the 4 Day Dunkerque Festival (since June 1993, the brand has travelled France with the Tour de France). “You always need a can of peas in the cupboard” recommended the TV commercial at the beginning of the 1960s.

Thanks to the chips in a can, Bonduelle first appeared on French television in 1973. And in 1985, the famous slogan “Quand c'est bon, c'est Bonduelle - When it is good, it is Bonduelle” was launched. In 2008, this slogan evolved to become “Quand les légumes sont bons, c'est Bonduelle – When the vegetables are good, it is Bonduelle”, which reinforced the appropriation of the brand to its territory: vegetables even if they are canned, frozen or packaged salads, can be of a superior quality.

The same year, anxious to communicate clearly on nutrition, the brand evolved its visual identity by capitalising on its values: nature, excellence and the protection of life and joie de vivre. Being more modern, bright and associated with well being, the brand expression became more visible. The mission of the Bonduelle brand was to become the new nutritional partner of the consumer.

A new advertising campaign aimed at changing Bonduelle’s brand image will be launched in 2014. “We are seen as a serious and honest brand but one that lacks imagination. We will showcase a new positioning in order to become a brand that inspires the desire for vegetables on a daily
basis”, explains Emmanuelle Cousy, Marketing Director of frozen products at Bonduelle. The TV advert will present a lifestyle that shows people cooking together.

The website http://www.bonduelle.fr offers:

- Menu Creator which enables you to programme up to a week of balanced meals; dinners with friends, TV dinners, family meal, and picnics;

- Super Mum, a column that offers tips on how to make your vegetables more beautiful, fun and adapted to your children’s tastes.

Moreover, the group seeks to promote the use of vegetables by chefs via their operation “Vegetable Day” initiated by the Louis Bonduelle Foundation in 2005. Every Tuesday, several vegetable recipes for entrees, main courses and desserts are offered on the dedicated internet site (www.fondation-louisbonduelle.org).
IV. Birth of a New Concept: The All-Vegetable Showcase Store

A. Genesis of the Project

In order to meet the strategic objectives of the group (make vegetables more accessible, cf. above) and following the experience of direct sales to staff and the development of factory outlets in France, Bonduelle innovated and created an original direct sales concept for the general public: Bonduelle Bienvenue – the all-vegetable showcase store.

The 3rd December 2010, a 100m² pilot store opened in Villeneuve d’Ascq, in the North of France, right beside the Group headquarters.

Villeneuve d’Ascq is nicknamed the “Green Technology Park” based on its activities both:
- academic (Universities of Lille 1 and Lille 3 and several Engineering Schools with a strong research centres);
- and economic (several companies as well as multinationals such as Bonduelle, Cofidis and Oxylane- have their headquarters there).

If the launch proves successful, other outlets may be deployed to other manufacturing locations of the group and eventually, near the head offices (i.e. a potential 15 stores). In other words, the aim is not to open stores in town, but to keep the concept of the showcase store with the objective of extending factory know-how in close collaboration with the consumers within a particular geographical area.

B. Concept

The first store structured into different zones with the Bonduelle colours is all of the below:
- A *factory shop*. A bargain zone (clearance products that are no longer sold in classic channels), represented by the orange colour, offer quality processed vegetables with a "short expiry date", which are discounted and end of line products (discontinued products or products that have changed format).

- A *showcase store*. Product display zone, with its green colour, occupying 3/4 of the store which aims to:
  
  - Discover the extent of the range in the four different Bonduelle categories (canned, frozen products, delicatessen products and 4th range packaged salads):
    - i.e. more than 300 references available in one place (in the Bonduelle and Cassegrain brand)\(^3\);
    - Including products sold abroad, world vegetables, German, Spanish and Polish products, etc.

  There have never been so many vegetables per square meter as in this sales zone.

  - Offer a bonus: whether it is Bonduelle’s novelties (e.g. Bonduelle steam range) or elaborated products (Délidômes);
  
  - Provide private individuals with access to an extensive range of products that were previously only reserved for professionals (catering market) i.e. the Food Service range.

- A *museum shop with a pedagogical dimension* - An information zone, in yellow colour, enables Bonduelle to:

  - Present the history of the Group, its culture, manufacturing processes, and the nutritional qualities of its vegetables;
  
  - To speak to and welcome groups (e.g. school children) for:
    - Conferences on nutrition, sustainable development, etc.,
    - Training on vegetable preparation: cooking lessons and other diverse activities.

  In addition, food tasting and simple recipe sheets for everyday use and for the whole family are offered upon entering the store in order to help the consumer get the best out of Bonduelle processed vegetables.

- A *pilot marketing store* – This is a test marketing store that can test out new packaging and recipes on customers.

\(^3\) There is no Bonduelle Bienvenue range of products.
Cf. Appendix 5 to visualise the store interior and the different “zones”.

A five-person team, brand spokespeople, are there to listen to customers and provide advice.

The objective of this store is not to enter into a power struggle with supermarkets, which is Bonduelle’s main retail outlet (three quarters of Bonduelle sales are in supermarkets), nor to cannibalize Bonduelle sales and its satellite brand (Cassegrain) between the two retail formats (which, incidentally, is unlikely as the concept is not intended for city centre or local shopping centres). The goal is to position itself as a complimentary outlet to increase Bonduelle’s market share in households by enabling them to have access to and (re)discover the entire range, especially frozen vegetables, which are monopolized in most super and hypermarkets by private labels, and enjoy the pleasure of delicatessen products, hitherto only reserved for professionals. Therefore, Bonduelle’s ambition is to generate sales and make the vegetable the dish to consume in order to win market share from competing products such as pasta and other starchy products or at least to ensure that the customers consume vegetables to accompany other dishes (pasta with vegetable, pizzas with vegetables, etc.).

C. Target

This store targets vegetable lovers, fans of good vegetables, aficionados, addicts of the Bonduelle/Cassegrain brand but also families concerned by the nutritional value of vegetables and those who wish to discover “fun food” not to mention, of course, traditional customers of factory shops, on the lookout for good bargains on quality products.

This “vegetarian” paradise also seduces local consumers: midday snacking and rushed evening shopping (those living nearby, students, etc.).

The group also seeks to conquer new targets not covered by traditional retailers such as very small restaurants for example, works councils and various associations, who do not have access to major food wholesalers. (cf. Appendix 6: Offers to Works Councils and Associations).
D. Name

On purpose, the store was not called Bonduelle Shop or Bonduelle Store or ... but Bonduelle Bienvenue! An original name that expresses welcome (the consumer comes to Bonduelle headquarters, who welcomes them, hence “Bienvenue – Welcome”) but also locality and conviviality with the promise of simplicity, gaiety, warmth and complicity. The name also initiates dialogue via the willingness of Bonduelle to “unveil” its profession, its values, and present the depth of its offer as well as share recipes.

The brand wants to become a real « Guest House » where the consumer feels “expected, welcome, and recognised”. Together with their consumption expectations, today’s consumer also have a more subject desire, that of being recognised.

E. Price

The global reference in vegetable well-being is above all selling a new retail space concept. The objective, therefore, is not to display a selling price that is lower than in supermarkets but to offer reductions all year long on quality products.

With the exception of the Bargain zone (Orange colour) where prices are halved or tripled, inside the product zone (Green colour), the products are sold at prices equivalent to the average regional price. However, the consumer can benefit from attractive prices with permanent discounts based on volume: Bargains all year long based on customer choice.

Instead of having X amount of promotions during the week, there is a permanent promotion: buy two, get one free, with the advantage of choosing between any of the four categories (which supermarkets cannot do as the only offer promotions on the same type of products). In order to simplify things, in terms of marketing, the policy is as follows: buy €15 of products, get 15% discount and buy €30, get 30%.

On your receipt, the discount is not listed next to each product but is deducted from the overall purchase, and hence, is an overall discount shown at the bottom of the receipt.

F. Distribution

Bonduelle Bienvenue, the showcase store, is open from Monday to Friday, 11am to 7pm and on Saturdays from 10am to 6pm.

The consumer can also order online in advance via (www.bonduellebienvenue.fr). The products are available three hours after ordering and for 48h at the store.
G. Promotion

The 3rd December 2010, Bonduelle Bienvenue opened. For one and a half years, the store worked via word of mouth.

Then in March 2012, a major promotional campaign was launched to recruit more consumers:

- A street marketing operation with the distribution of flyers in the Lille area;
- Game "Win your weight in peas" from 1st March until 30 April 2012;
- 1,000 €10 vouchers were sold in one day (offering €20 in the store) on Groupon;
- Sponsorship activities;
- etc.

This promotion campaign was successful in that customers almost doubled: Up until March 2012, the store had 1,200 customers per month; after the campaign, the store had 2,000 customers per month.

Bonduelle Bienvenue did not try to employ the same promotional activities as the traditional distribution. Since March 2012, a monthly newsletter has been addressed to all customers so that they can follow the news about the store and discover the operations and activities offered. The brand also created a Facebook page in May 2012. Progressively, the customer base is being built.

(Cf. Appendix 7: Promotional Activities).
H. Encouraging Initial Results

1. Sales

Sales per unit:

- The Bargain Zone represents 25% of sales
- The Canned Food Zone represents 45% of sales (excluding the Bargains)
- The Frozen Zone represents 20% of sales
- Fresh Products Zone – mainly snack products – represents 10% of sales

2. Customers and Purchasing Habits

Customer Typology – Average basket

- Customers with an average basket of less than €5: Snacking Customers constitute 35% of the clientele and are mainly interested in snack products: mainly customers who work locally and come to buy their lunch (salad, etc.); the snacking customer spends little in-store (average basket €3).
- Customers with an average basket of less than €30: They represent 15% to 20% of the clientele. They do not benefit from the -30% offer due to their lack of storage space in their homes or the number of people they shop for.
- These customers benefit from the 15% discount and spend generally between €12 and €21 (average basket €16).
- Customers with an average basket greater than €30: This is 40% of the clientele; mainly mothers focused on nutrition.

These customers benefit from the 30% discount with an average basket of €34 (30 to 35% buy more than €30).

Main types of shopping frequency:

- Low frequency and high basket price ➔ long distance shoppers
- High frequency and low basket price ➔ local shoppers

The re-purchasing rate is 40%. However, as there are many new customers, this rate does not reflect the real in-store return customer rate.

In 2013, Bonduelle Bienvenue had more than 10,000 customers (excluding Bonduelle staff).
3. Customer Satisfaction and Expectation

A roundtable discussion was conducted with 10 consumers in 2012. The analysis of the interviews showed the following:

- **The Consumers appreciate:**
  - The low price (the bargains);
  - The extent of the offer in-store, especially concerning the frozen products (as the offer is reduced in supermarkets);
  - The “delicatessen” products of the Food Service range;
  - The pricing offer: Buy €15 of assorted products = get 15% reduction; €30 = 30%;
  - The availability of the sales team who advise on preparing the vegetables.

- **Customers have the impression of spending 5 minutes in-store when in reality they spend 10 – 15 minutes.**

- **3/4 of customers purchase products in both channels.**

As regards expectations, by shopping for vegetables at Bonduelle Bienvenue, customers are looking for bargains, are discovering new products, and are experiencing something else in a fun atmosphere, acquiring a status, satisfying a need for individualisation, for some, or to adhere to a group, for others.

4. Which deployment Strategy for Bonduelle Bienvenue?

After two years in existence and promising initial results, Pierre Masse, Bonduelle’s Project Director, and Sandrine Debreyne, Bonduelle Bienvenue Store Manager, would like to give a new momentum to this new concept that is 100% dedicated to Bonduelle vegetables and a hybrid between a factory shop and a showcase store.

Up until now, the objective was mainly to focus on the store as a retail outlet. The main advantages were:

- As a PRIORITY ➔ Enjoy price “deals” on over-stocked products to offer deals on quality products;
- And SECONDLY ➔ In one space, to discover and gain access to the largest offer of processed vegetables in the world.

Beyond the sale of products and customer benefits that do not exist elsewhere, it is now time to further promote the company’s values and to focus on the production of experiences around the brand. Pierre Masse and Sandrine Debreyne are aware that it is by offering an experience that the brand can really differentiate itself and establish a more emotional connection with the consumers. But the deployment of this objective requires careful consideration.
V. Appendix 1: The Vegetable Market

Since the 1990s, the share of vegetable food expenditure increased by 0.2 points in Europe and by 1.9 points in North America. In fact, vegetables have benefited from the positive health effects by households, touted by many public health campaigns.

The vegetable offer is segmented into several ranges. 5 Levels can be distinguished:

- 1st range = fresh products
- 2nd range = sterilized products
- 3rd range= frozen products
- 4th range = pre-cut fresh products ("fresh-cut")
- 5th range = vacuum cooked products (pasteurised and kept cold)

A. The processed vegetable market

Bonduelle intervenes solely in the processed vegetable market. Processed vegetables represent only 40% of vegetables consumed in France as opposed to 50% in the United States.

Growth potential in Europe (Poland, Italy and France) compared to USA

(Source: Food for Thought 2010; 2009 Market)
In France, including all channels:

Canned and frozen products share 1st place in the processed vegetable market;

The 4th range and delicatessen products have the highest growth rate.

The vegetable market in France (Unit: share in % of turnover)

1. Dynamics and perspectives of the sector

The vegetable market has developed three successive evolutions, which reflect the transformation in consumption habits. Canning, a technique which appeared at the beginning of the 20th century, remains at the heart of the market but it has been mature for the past 30 years. Freezing, developed in the 1970s has experienced strong growth and is now beginning to show signs of maturity. The latest food technology, freshly pre-prepared food (salads in sachets) dates from 1990 and is developing and gaining market share. Fruit and vegetable consumption differs enormously depending on the consumer’s standard of living. However, most European countries consider the increase in daily consumption of fruit and vegetables to be a public health issue. The consumption of processed products (canned or frozen foods excluding prepared meals) is still growing but remains minimal.

A trendy yet untapped market

- Strong communication around the vegetable through PNNS (French National Nutrition and Health Programme): 75% of those interviewed know that they must eat at least 5 fruits and vegetables a day

- But communication can be improved: Abundance of messages + nutritional cacophony + guilt-ridden messages

- Therefore, a very high consumption potential:
  
  only 25% of adults and 7% of children consume 5 fruits and vegetables a day

  versus 2003: more small portions(<3.5 portions) – average portions (between 3.5 et 5) stability of large portions (>5)

Barriers to Vegetable Consumption

- Need to cook them to give them taste (68%)
- Price or quality/price ratio (36%)
- Preparation time/long cooking time (28%)
The Processed Vegetable, a lever to remove the barriers

- Ready to use, already cooked products
- Stable annual selling price and often cheaper than fresh products
- Ready made products in portions

Confusion between Fresh vegetables and processed vegetables

A food that was previously considered to be tacky, today, the vegetable is at the heart of all public health concerns. For many consumers, the ideal is to eat fresh vegetables from the garden. It is true that for certain foods, freshness is paramount. However, immediately after being harvested, vegetables begin to lose their vitamins. Therefore, vegetables bought on the market and stocked in the refrigerator or in a pantry for a few days inevitably lose their nutritional properties. In addition, exposure to the air, to temperature, to light, etc., are all supplementary factors that contribute to the loss of vitamins, not to mention the vegetable preparation process (washing, peeling, cooking). Therefore, to maximise the nutritional value of vegetables is a real race against time.

The processing time for a vegetable after harvesting is a contingency that is dear to Bonduelle’s heart. The processing factories are located near the vegetable fields and this enables them to optimise the preservation of taste and nutritional quality. Frozen or canned vegetables are after all just vegetables, even if they are further elaborated or ready-to-eat; often they are richer in vitamins than fresh vegetables.

2. Main Competitors:

In the canned vegetable sector, Bonduelle’s main competitor in France is the co-operative group Cebab, with 54% of their business from the brand D’Aucy.

In the catering sector, Bonduelle is in competition with Martinet.

Concerning the 4th range packaged salad; Bonduelle’s competitors are Florette and Crudettes.

In the frozen vegetable sector, Bonduelle is in competition with BirdsEye, Iglo and Findus on the European market.

VI. Appendix 2 : Key Dates

A. From the Family Farm to the Global Group

(Extracted from: http://fr.wikipedia.org/wiki/Bonduelle)

1853 – Two friends, Louis-Antoine Bonduelle-Dalle and Louis Lesaffre-Roussel founded a grain and juniper berry distillery in Marquette-lez-Lille (59) and in 1862 they bought a farm in Renescure (59).

1901 – 7 factories of the Group are shared between three family businesses: Bonduelle, Lesaffre and Lemaitre.

1926 – The two brothers, Pierre and Benoît Bonduelle, set up a pea canning business on their farm in Renescure.

1947 - Creation of the Bonduelle brand.
1957 - Bonduelle invents a combination of peas and carrots.

1963 - Construction of a factory in Estrées-Mons in the Somme, which became the largest canning plant in the world.


1973 - Bonduelle makes 50% of its turnover on exports.

1989 - The Group acquires its main competitor, Cassegrain, from Saupiquet. Start of the expansion eastwards.

1992 – Acquisition of the Hungarian factory Nagykőrösis, which becomes the largest sweet corn canning installation in the world.

1997 - Bonduelle enters the “freshly processed” business with the acquisition of Salade Minute and becomes European Leader.

1998 – Stock Exchange Quotation. The family retains 52% of shares.

1999 – The group sponsors Jean Le Cam multihull in the round-the-world single-handed yacht race, the Vendée Globe. This sponsorship ceases in 2005.

2001 - Christophe Bonduelle becomes Chairman of the Board and implements his strategy "vegetables in all their forms".

2003 – Creation of the subsidiary Bonduelle Traiteur after the acquisition of the Breton company Michel Caugant, specialists in delicatessen vegetable products.

2004 – Opening of the Russian factory Krasnodar, near the Black Sea.

2005 – Creation of the Louis-Bonduelle Fondation, to encourage vegetable consumption in the world.

2007 – Takeover of Aliments Carrière (Artic Gardens brand), the Canadian leader in canned and frozen vegetables. This enables the group to gain access to 39,500 hectares of farmland.

2010 - Acquisition of France Champignon. For Bonduelle, mushrooms become the second most popular vegetable after sweet corn.

2012 - Acquisition of three processing plants and a packaging plant for frozen vegetables in the United States, on the one hand, and assets of the industrial food and sales of the French cooperative group Cecab in Russia and in the countries of the Commonwealth of the Independent States (CIS), on the other hand.
Appendix 3: Bonduelle’s activities

(Extracted from: http://www.bonduelle.com)

A. Canned vegetables, Bonduelle’s historical business

The canned vegetables business remains Bonduelle’s main activity and represents 53% of its turnover (Financial year 2010-2011).

Present on the consumer market and the out-of-home catering market under its own brands (Bonduelle, Cassegrain) but also in many consumer brands.

In addition, Bonduelle has become the largest European producer of canned sweet corn.

The European market leader with 30% of market share, Bonduelle is n°1 in France and in Europe and Leader in Canada with 70% market share.

B. Bonduelle, specialist in frozen vegetables

The Bonduelle Group devotes a major part of its investments to developing elaborated frozen vegetables that are at the forefront of innovation.
In just three decades, Bonduelle has managed to establish itself in Europe. Number 2 on the market, today it has 12% of market share (n°1 in France, Spain and in Brazil; n°2 in The Netherlands, Belgium, Germany and Portugal).

Since the acquisition of Canadien Carrière, Bonduelle has become the leader of this business in Canada and is present in the USA.

Their latest innovation: pre-cooked, steamed frozen products (cf. appendix 4: 60 years of innovation).

C. Bonduelle, specialist in fresh vegetables

The fresh vegetable market represents 22% of turnover for the group and is divided into two main businesses:

- Green salads and raw vegetables without seasoning in sachets (4th range);
- seasoned delicatessen products.

Green salads and raw vegetables without seasoning in sachets (4th range)

The acquisition of Vita, the German leader in the 4th range salad market, enabled Bonduelle to strengthen its position in Europe: it is now number 1 with 20% of the market.

In packaged produce (4th range), Bonduelle offers many innovative and varied products: lettuce, arugula, oak leaf, mixed green salad, corn salad, curly salad, etc.

Seasoned delicatessen products

After the acquisition of Michel Caugant in 2003, the subsidiary, Bonduelle Traiteur, which was totally dedicated to this sector, was created. It is the leader on the French market.

Bonduelle’s seasoned delicatessen products are available to consumers (tabouleh, carrots, etc.) and on the catering market, where they are marketed by the Bonduelle Food Service subsidiary.

VIII. Appendix 4: 60 years of innovation

Even if the vegetable is possibly as old as the world, Bonduelle has a well-developed innovative gene when it comes to vegetables. The company devotes 1% of its turnover to R&D, much more than the food industry average (0.4%), in order to innovate its products, packaging, and processes and continually improve its quality and service.

Initially with canning invented in 1957, the combination of peas and carrots is the first ever mixed vegetables offered on the market; it even became part of French culinary heritage. The supermarket shelves progressively filled up with French beans, haricot beans and many other vegetables, the objective being to stand out from their competitors and to offer the widest range possible.

In the 1960s, marked by changes in society such as the continuous rise in the standard of living and the birth of supermarkets, the brand adapted and innovated. In 1968, the brand was the first to launch frozen vegetables starting with peas.

The third brand innovation is canned French fries at the end of the 1990s. In 1998 Bonduelle offered packaged green salads and launched seasoned delicatessen products in a container that can be opened and closed easily.

Some flops

**Canned French** fries were way too soft, and as a result, were a resounding failure. Launched in 1973, processing is stopped a few months later. Today, in collaboration with McDonalds, Bonduelle is testing breaded vegetable fries.

**Bonduelle Cassoulet (sausage and bean hotpot).**
Sold in 1956, and stopped in 1963. The price of the meat is too high. William Saurin remains the leader in the sector.

In 2010, the group innovates with a concept of steamed vegetables which are then canned or frozen.
In 2013, after 10 years of development, Bonduelle in partnership with Ardagh, created a new generation of canning. A new design – threadbare moulding, smooth surface and especially a greener and more sustainable packaging based on techniques linked to nitrogen quantities, which is similar to the beverage industry and generates a significant savings of material. You should also note the extra freshness acquired by the "pschitt" sound when air enters the can upon opening.
IX. Appendix 5: The Different “Zones” of Bonduelle Bienvenue

For a guided store visit: http://www.youtube.com/watch?v=PsPruTO9cT8

Back of the Store

Entrance
View when entering in the store
(backdrop - back of the store)

View when leaving the store
(backdrop: windows with view of car park)

Discovery Zone at the entrance of the store
Products Zone, in green, on the right when you enter the store, behind the Discovery Zone
Bargain Zone, in orange,
on the left when you enter the store,
behind the Discovery Zone

Fresh Delicatessen& Frozen Zone, in green, on the right when you enter the store
Premium Brand near the check-out

before entering the Information Zone

Information / Meeting Zone, in yellow, a closed-off space on the left when you enter the store
X. Appendix 6: Offers for Works Councils and Associations

DÉCOUVREZ L'ENSEMBLE DE LA GAMME BONDUELLE ET PROFitez DE NOS BONNES AFFAIRES !

NOTRE OFFRE CE & ASSOCIATIONS

En devenant partenaire de Bonduelle Bienvenue, nous vous proposons de :
- Organiser des ventes dans vos locaux ou dans notre magasin pour vos salariés ou adhérents.
- Présenter notre offre « gros conditionnements » pour vos repas d’association ou d’entreprise.
- Et surtout de vous faire profiter d’un partenariat exclusif et d’animations privées !

DES PRIX
-15% sur
-30% sur

DU CHOIX

Découvrez l’ensemble des gammes Bonduelle, en un seul point de vente : surgelés, conserves, salades en sachet et traiteur.

DU CONSEIL

Profitez des conseils et de l’expertise de nos vendeurs pour organiser des animations autour du légumes !

POUR EN PROFITER, rendez-vous dans votre magasin Bonduelle Bienvenue au confiseur Sandrine DESBREYNE au 03 20 43 79 19
sd@desbreyne.com

MAGASIN CLERMONT-GUASTO
Route du confiseur
54 774 Távora
Tél. : 03 20 42 79 19

MAGASIN BONNEVAL
Route du confiseur
54 774 Távora
Tél. : 03 20 42 79 19

MAGASIN SAGNAC
Route du confiseur
54 774 Távora
Tél. : 03 20 42 79 19

www.bonduelleBienvenue.fr

XI. Appendix 7 : Promotional Activities

Street marketing campaign with the distribution of fliers

Game «Win your weight in peas!»
Groupon Sale

**Coupon**

Bon d’achat valable sur le magasin de Villeneuve d’Ascq

Valeur du bon : 20,00 €

**Code du bon**

Valable du 13.03.2012 au 30.03.2012

REF : 389

**Code de sécurité**

Le partenaire : Bonduelle
81 rue Édouard Redon, 09603 Villeneuve d’Ascq

Les conditions

Valide jusqu’au 30 juin 2012. Offre non remboursable. Offre non cumulable. 1 bon par transaction. Imprimez votre bon et présentez-le en cas de doute au moment de votre achat. Du lundi au vendredi de 11h à 19h, les samedis de 9h à 18h. Voir les conditions générales.

**Comment ça marche ?**

- Imprimez votre bon Groupon
- Réservons votre panier
- Apportez votre bon Groupon
- Profitez de notre Deal !

Avez-vous des questions ? Envoyez à groupon : http://contact.groupon.fr, Usage ID 1377146

**Sponsorship Activities**

**Bonduelle Bienvenue**

Faites découvrir le magasin Bonduelle Bienvenue et en même temps les prix

1. Renseignez vos coordonnées "partenaires"
2. Vous serez contacté par un membre de notre équipe
3. Votre équipe sera présente le jour des dégustations et des ventes

Chers Clients,

Je suis très heureuse de vous adresser aujourd'hui notre première newsletter qui vous permettra de suivre l'actualité de votre magasin Bonduelle Bienvenue : bonnes affaires, nouveautés, animations, idées recette...

Le légume n'aura jamais été aussi proche de vous !

Découvrez aussi notre nouvelle site internet www.bonduellebienvenue.fr : vos légumes en direct et en quelques clics !

A très bientôt !

Sandrine Debreyne,
Responsable du rayon Bonduelle Bienvenue.

NOUVEAU

www.bonduellebienvenue.fr
RAPIDE, SÛR ET TELLEMENT PRATIQUE, VOS COURSES EN QUELQUES CLIQUES

1. Choisissez vos produits, placez-les dans votre panier
2. Payez en ligne et utilisez votre levier
3. Vous recevez vos produits à votre domicile

Vos produits sont disponibles 3h après votre commande et pendant 48h au magasin.

À DÉCOUVRIR

LES NUITS DE MANGER CHEZ SOI COMME AU RESTAURANT

Une gamme de produits cuits et pressqués !

Recette rôtie quiche antioxidante au recette aux légumes verts
Prêt en 4 min seulement !

Convert Split bien aux utilisateurs de la traditionnelle conserve à ceux du monde sans.

IDÉE RECETTE

OMELETTE AUX CHAMPIGNONS DE PARIS

Végétarien / 4 personnes - Plat ( Facile )

Ingrédients :
- 6 œufs
- 1 boîte de champignons émondés
- 2 cuillères à soupe de lait écrémé
- 1 gousse d'ail
- 1 bouquet de persil
- Sel, poivre

Faites fondre une cuillère de beurre dans une poêle, ajoutez-y les champignons à revenir quelques minutes.

Épluchez le persil, hachez les œufs, ajoutez 2 cuillères de lait, poivrez.

Assaisonnez les champignons de la poêle et réservez-les au chaud. Verser les œufs brûlés dans ce même récipient et mélangez vivement au centre, à la spatule, afin de faciliter l'oeuf de la coagulation.

Bonduelle Bienvenue - 51 rue Etoile de France, 92500 Vélizy-Villacoublay
Magasin ouvert du lundi au vendredi de 8h à 19h, le samedi de 9h à 19h.
Chers Clients,

Ce mois-ci dans votre magasin Bonduelle Bienvenue, venez découvrir notre opération Développement Durable !

Retrouvez une sélection de produits à prix découvrent, respectant cette politique de développement durable que l'ensemble du groupe Bonduelle s'efforce à mettre en œuvre au quotidien. Profitez également de nos animations pour petits et grands : conférence, ateliers, bus info iri...

À très bientôt !

Sandrine Debreyne,
responsable du magasin Bonduelle Bienvenue

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**AGENDA DES ANIMATIONS**

**LE VENDREDI**
20 AVRIL
ET LE SAMEDI
28 AVRIL
TOUTE LA JOURNÉE

Animation pour adultes
"Apprendre à mieux consommer"

**BUS INFOS TRI**
18 AVRIL
DE 11H À 13H

Expositions itinérantes tout public

**20 AVRIL**
DE 11H À 12H30

(SUR INSCRIPTION
AU BÂTON MAGASIN
OU PAR TÉLÉPHONE
POUR 25 PERSONNES)

Conférence de Monsieur J B Bonduelle
"Le développement durable au sein du Groupe Bonduelle"

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**BONNES AFFAIRES**

ARRÊT FORMAT PROMO
OFFRE LIMITÉE À 1000 PIÈCES

- POLE LE Tous en FORME MCRCIOLIS, COURGETTES ET RIZ
  Le sachet - 540G
  1,50€ SEULEMENT !

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**À DÉCOUVRIR**

**COURGETTES CUISINÉES À LA PROVENÇALE**

À la fois ferme et fondante, les courgettes sélectionnées par Cassagne vous révèlent toute leur saveur dans cette recette aux sublimes notes anisses.

**CONFIT D'AUBERGINES**

La chair fine de l'aubergine exige les attentions les plus délicates. Elle est ici cuite en dessous, corsée avec des petits oignons et des tomates gorgées de soleil, sans oublier le pointe de basilic qui vient délicatement relever cette recette.
Activities

“GROS CONDITIONNEMENTS”
09 MAI AU 30 JUIN 2012
Grâce à Bonduelle, réalisez un
BUFFET FACILE,
pour un événement réussi !

AGENDA DES ANIMATIONS
25 MAI
13 JUIN
Bonduelle vous apprendra à réaliser
un buffet réussi !

DU 4 JUILLET AU 18 AOÛT 2012
Légumes d’été,
en toute simplicité,
vos invités vont adorer !

DU 17 OCTOBRE AU 17 NOVEMBRE 2012
En auTOMNE les
CHAMPIGNONS
vous étonnent !

DU 18 NOVEMBRE AU 31 DÉCEMBRE 2012
Légumes en FÊTE !

Bonduelle
BIENVENUE :
FOIRE A LA CONSERVE
Du 25/08/12 au 15/09/12

Bonduelle
BIENVENUE :
LECONSEILS PERSONNALISÉS
Du 9 MAI AU 30 JUIN 2012

Facebook Page