

**SUCCESSFULLY ENTERING THE DUTCH RETAIL MARKET**  
***AN UNDERSTANDING OF PRICE MARGINS AND VALUE CHAIN MECHANICS***



*May 2010*

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# 1 Preface

Each market has its own specifics and characteristics and The Netherlands are not different in this. Fortunately, there is a certain harmonization taking place on demands and requirements, both within the European Union and amongst international retailers. Still, differences between markets exist and can complicate trading internationally.

In many aspects, The Netherlands are an easy market to enter. Short geographical distances, transparency in trading, very well organized logistics and a concentrated retail scene are in favour of the Netherlands in comparison to its neighbouring countries.

This report enables the (soon to be) exporter to familiarize himself with all the specific demands and requirements that apply to trading with Dutch retailers. You just get one go at a retailer, so the first pitch for business should be successful in all aspects. This report clearly explains all these aspects, from bottom to top and enables the exporter to successfully make this first pitch.

Green Seed The Netherlands

From a small seed  
a mighty trunk may grow.

Aeschylus

## 2 Methodology

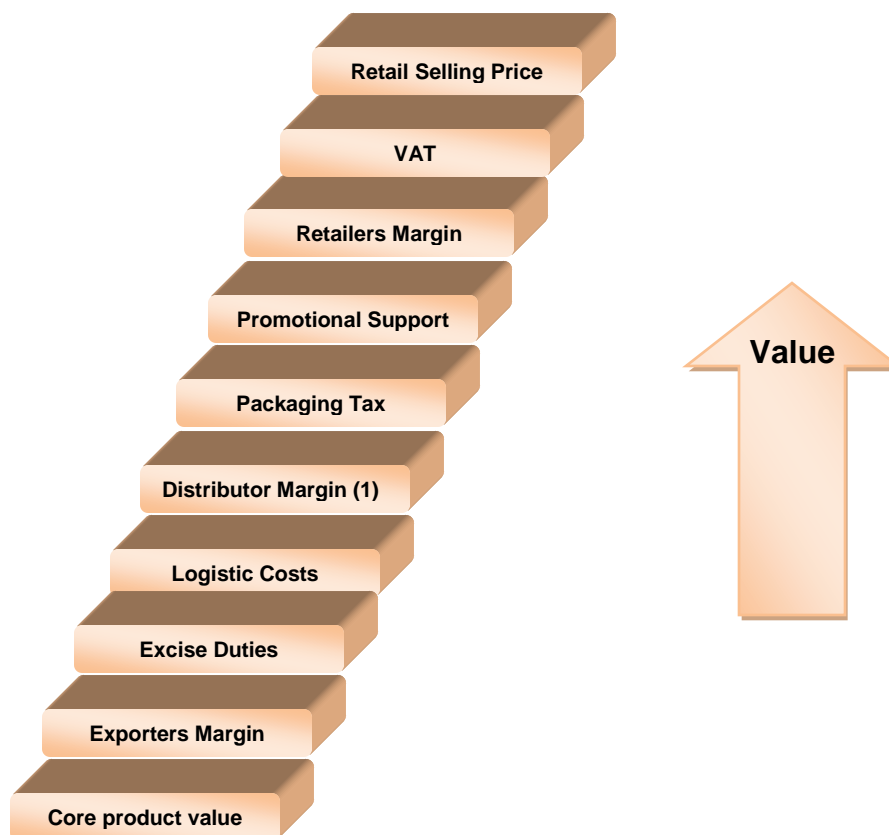
For the purpose of this report, the *value chain* is followed from the manufacturer towards the end-user. All requirements of each layer are described, enabling the exporter to examine the requirements to successfully enter the Dutch market.

The input for this report originates from the expertise and experience Green Seed The Netherlands have in assisting food and drink manufacturers in establishing listings in Supermarket retail.

Input is provided by the retailers themselves, through manuals, documents or other publications they provide to (potential) suppliers.

External resources are utilized in the case of specific information concerning tax regulations, packaging requirements and legal aspects. In the case of very complex detail, a referral is made towards the source of information, enabling the reader to gain further knowledge.

The value build-up;



<sup>1</sup> If applicable

### 3 Value chain mechanics

In this chapter, all *value chain layers* are explained and *cost indications* are stated. Some of the mechanics are specific to the Dutch market, others will be recognized as familiar as they will apply for the European Union in general or are initiated by international retail trade organizations.

#### 3.1 Consumer research

When preparing to enter the Dutch supermarket retail market with a non commodity proposition, investments in *qualitative* and *quantitative consumer research* are helpful in ensuring that product concepts are in line with consumer needs and requirements. Consumer preferences differ per geographic market; to be able to understand this and to determine the level of difference from domestic market preferences, these, sometimes slight *differences*, will have to be recognized and dealt with. Research used to be an activity carried out by branded suppliers, nowadays also own label propositions are researched, enabling a successful pitch for business.

When carried out in a proper manner, a second benefit is that the research findings will *contribute to convincing a retailer* that his customers are willing to buy the specific product proposition. Thirdly, it shows long term *commitment* to potential retail partners and confirms a strategic approach.

In many occasions, just qualitative research will be sufficient before seeking commitment from potential retail partners. In some occasions, as a second phase, the more expensive quantitative research (taste panel) is recommended, following a first sense check with retailers.

Depending on the proposition, *qualitative research* by means of 4 focus groups is a *minimal requirement*. In these groups, amongst others, the competitive field, usages and attitudes, price levels and usp's will be explored. Costs of 4 groups of 6-8 respondents vary between 20.000 and 24.000 Euro.



Blind taste test

Qualitative and quantitative consumer research in order to prepare for an introduction is often looked at as a high and risk full upfront investment with no guarantee on return. Research is *not mandatory* but highly recommended; it will prevent expensive mismatches and increase the probability of success.

In the case of *own label propositions*, certain retailers will carry out panel research themselves to ensure customer acceptance. This takes place after negotiating and accepting all commercials and trading terms and conditions.

In addition to the above, it is recommended to invest in *scanning data* to understand *the category dynamics*. This way, an analysis can be made to establish potential (total market and per retailer), market leaders and followers, strong and weak competitors, distribution levels, etc. In order to break into a certain category, *data analysis* is crucial in preparing a business offer to a retailer. When listed, a periodic purchase of scanning data is recommended to follow performance and category developments. Top line Nielsen scanning data starts at a rate of Euro 2.500 and increases when more in-depth data is required.

For details on Dutch research organizations, see chapter 6.1

## 3.2 Taxes and duties

### 3.2.1 VAT

In the Netherlands Value Added Tax applies to all products and services sold in supermarket retail. *2 different tariffs* apply;

- 6 percent is the lowered tariff and is charged on all food items
- 19 percent is the standard tariff and is charged on all non-food items, alcoholic beverages and services

All layers in the value chain that add value have to specify VAT (in Dutch BTW) *separately* on the invoice and will have to keep a *VAT administration*. Except the end user (retailer's customers) all layers pay and receive VAT. The balance of

	Code	Bedrag
	H €	90,00
	H €	90,00
Totaal (excl. BTW) €		180,00
BTW €		34,20
Te betalen totaal (incl. BTW) €		214,20

this will have to paid to (or will be received from) the Dutch tax authorities.

For exporters to the Netherlands the following applies;

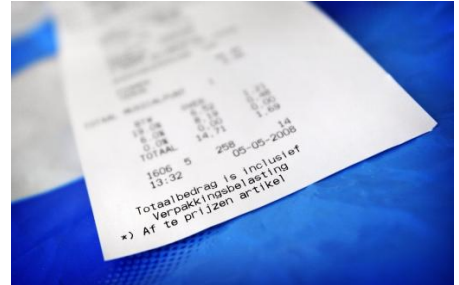
Code	BTW %	Totaal (excl.)	Totaal BTW	Totaal (incl.)
H	19,00	€ 180,00	€ 34,20	€ 214,20

In the case of exporting food from an EU country to the Netherlands, adding value will start at the *first chain operator* in The Netherlands.

Invoices to this first chain operator do not include (Dutch) VAT.

Standard tariff of 19

- When supplying directly to a *retailers depot*, the retailer is the first chain operator and will charge VAT to the customer (end user) and look after VAT administration.
- When supplying to a 3<sup>rd</sup>. party like a distributor, this is considered the first layer that adds value and will charge VAT to the next chain (retailer) and the retailer will charge VAT to the customer (end user). Both, the 3<sup>rd</sup>. party and the retailer will look after their own VAT administration.
- When setting up an *in market branch*, it is mandatory to register at the Dutch tax authorities and apply for a Dutch VAT number. The branch will be the first operator in the value chain and is responsible for VAT administration



Some retailers state “packaging tax is included” on the receipt

In most cases, especially when starting up export to the Netherlands, the first 2 bullet points will apply. It is highly recommended to consult a tax specialist on VAT issues after having a launch agreement.

In discussing or negotiating prices with retailers or other chain operators, reference to prices are always VAT excluded.

Example calculation taking out the lower tariff VAT (6 %) on a Retailer Selling Price;

RSP	Euro 2,00
VAT	Euro 0.113 –
RSP-VAT	Euro, 1,887 (Euro 2,00 / 1,06 )

Example calculation adding lower tariff VAT (6 %) on a Manufacturers Selling Price

MSP	Euro 2,00
VAT	Euro 0,12
MSP+VAT	Euro 2,12 (Euro 2,00 x 1,06)

### 3.2.2 Packaging Tax

The Dutch government enforces *minimization of packaging* use by charging a packaging tax on food & drink products.

The tax rate is depends on the *weight* and the *type of packaging materials* used for a particular product. Per category of packaging, the weight and type of

packaging material needs to be specified at SKU-level. Based on the tariffs per kg for these packaging types, the packaging tax per SKU is calculated. Less environmental friendly packaging types have higher rates per kg

The following categories of packaging do exist:

- Primary (i.e. the product pack material)
- Secondary (i.e. the material of the outer case or tray)
- Tertiary (i.e. the material of the pallet e.g. wood, shrink wrap etc)

In case of imported products, the *first chain operator* in the value chain is responsible for the administration and payment of the packaging tax.

In case of products supplied by a NL-registered company or branch, this company or branch is responsible for *administration or payment*. In the end, the consumer pays for the packaging tax, as this is integrated in the MSP. When calculating an offer for a retailer, packaging tax needs to be taken into consideration. For further information, please (see *appendix A*) on tariffs and calculation spreadsheet. Packaging tax ranges from 0,5 euro cent to 2 eurocent per product .

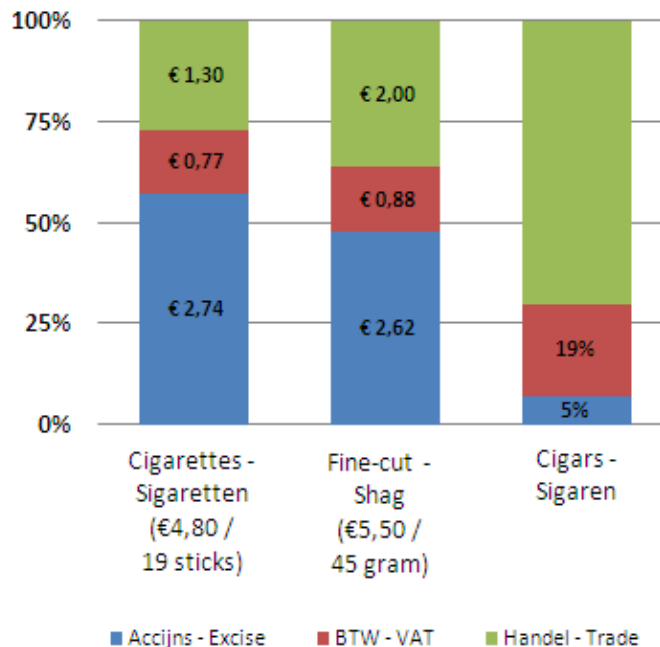
### 3.2.3 Excise duties

Within groceries in the European Union, excise duties apply to tobacco, soft-drinks and alcoholic products. Rates however differ per country. *Excise rates* apply at the moment that products have *customs clearance* in the destination market and have a large impact on the actual RSP level. Excise duties are levied by the *Dutch customs organization*. <http://www.douane.nl/english>

For alcoholic drinks other tariffs apply, and rates differ depending on the alcohol content percentage. Rates differ from Euro 5, 50 per hectoliter for beer under 7 percent alcohol to Euro 17,50 per hectoliter per alcohol percentage. For exact details please check <http://www.douane.nl/english>

Within tobacco, the following breakdown applies;

#### Prijsopbouw - Price breakdown



Bron: Wet op de accijns - Source: Excise law, March 1st 2010

### 3.2.4 Consumer tax

Consumer tax is similar to excise duties, but is named differently as it applies to products that offer no health risk. Within the food industry, consumer tax *applies to soft drinks*, and the following rates apply per hectoliter at a temperature of 20° degrees Celsius;

- Fruit and vegetable juices and mineral water, Euro 4,13 per hectoliter
- Lemonades and soft drinks containing fruit Euro 5,50 per hectoliter

Unlike excise duties, consumer tax does not have any EU legislative background and applies to the NL market only. Calculation, administration and payments are similar as excise duties.



GS1 labels (EAN 13) on consumer packaging is mandatory and subject to specific regulations concerning size, color, contrast etc. EAN codes are currently referred to as *GTIN's* (Global Trade Identification Number)

Further details on this subject are stated in *chapter 3.5* on electronic data exchange.

### 3.3.2 Packaging

Packaging directly in contact with food items are subject to specific *EU regulations*. Packaging requirements and regulations are initiated for *food safety* and *environmental* purposes and monitored by the Food and Consumer Product Safety Authority, a body from the Dutch department of agriculture.

Shelf space in The Netherlands is very limited. Retailers prefer packaging that is as efficient as possible to utilize shelf space in the best possible way. As example, packaging facing the front in *portrait* format is preferred over *landscape* format.



Correct version



Incorrect version

Limited shelf space also has an impact on *outer cases*. Most products just have one facing, end therefore limited in-store stockholding. This requires a very strict *replenishment system* and small outer cases. On outer cases, please also check *chapter 3.4* on logistics.

### 3.4 Logistics

Logistics are of vital importance in developing exports to the Netherlands and options should be evaluated *prior to approaching* potential retail customers. Logistic costs have a large impact on the actual offer and determine if a proposition is feasible or not.

In general, for frozen, chilled and ambient, retailers will not keep stock and still require a *high service level*, up to delivery to depots 6 times a week for fast rotating chilled products with a short shelf life. In other cases, 1 or 2 deliveries are sufficient when supplying longer shelf life products



CBL 23 Crate

A 3<sup>rd</sup>. party in the Netherlands can be of value and enables the exporter to meet these requirements.

For chilled products, there is an additional benefit for using a 3<sup>rd</sup>. party. Retailers in The Netherlands require chilled products to be delivered in *CBL crates and CBL rollys*. (See also *appendix B*). Although CBL can be integrated in the own dispatch operation, there are distribution benefits if de-boxing and CBL crating is done in market.

In some occasions retailers will suggest a suitable 3<sup>rd</sup>. parties who already supply this specific retailer. This can be *logistic service supplier* or a distributor \ manufacturer. In the last case, this distributor\manufacturer will be the customer and invoice the retailer. A direct relationship with the retailer will still maintain.

To integrate logistic cost in a cost calculation, *optimal pallet loads* needs to be determined, in Chep pallets or in Europallets. Hauliers with access to retailers depots will quote shipments costs per pallet from the manufacturers site to the retailers depot, based on expected volumes.

In the case of a supplying in CBL crates and rollys, the same applies; the optimum crate-size and roly load needs to be determined to be able to retrieve shipment costs from hauliers.

Some retailers request ex-works and delivery depot prices to be able to determine *if back-hauling* would result to a lower buy-in price.

Further information on logistic requirement are specified in the retailers section of this report (*see chapter 4*)

### 3.5 Electronic Data exchange requirements

More and more, retailers are using the internet and automated systems to *exchange information*. Taking part in these systems is *mandatory* if a company wants to supply (directly) to retailer. The extent of detail in which these systems are utilized differs per retailer. In general, retailer Albert Heijn is leading in this in the Netherlands.

Please note that even though these systems are set-up to be uniform for all (international) retailers, *slight differences* do exist per retailer or even per market causing systems not to be entirely *compatible*. It is recommended to allow sufficient *specialist time* to meet these requirements once a listing is agreed. Below a full description for the systems that are in place in The Netherlands.

#### 3.5.1 EDI

EDI is defined as: The automated electronic *exchange of data* between the information systems of different organizations according to a predefined structure. EDI aims to significantly *simplify* administrative operations and to improve the quality and speed of information and data exchange. This enables retailers and its suppliers to *manage the logistical flow* in a better way.

EDI standardizes the electronic data communication between parties. Retailers in The Netherlands have selected subsets of the internationally recognized standard EANCOM. These subsets are managed by GS1 The Netherlands.

Within the Netherlands the following activities are exchanged and communicated by EDI;

- Ordering
- Delivery
- Stock management
- Invoicing
- Payment

Each message consists of sub-messages on the status of each activity.

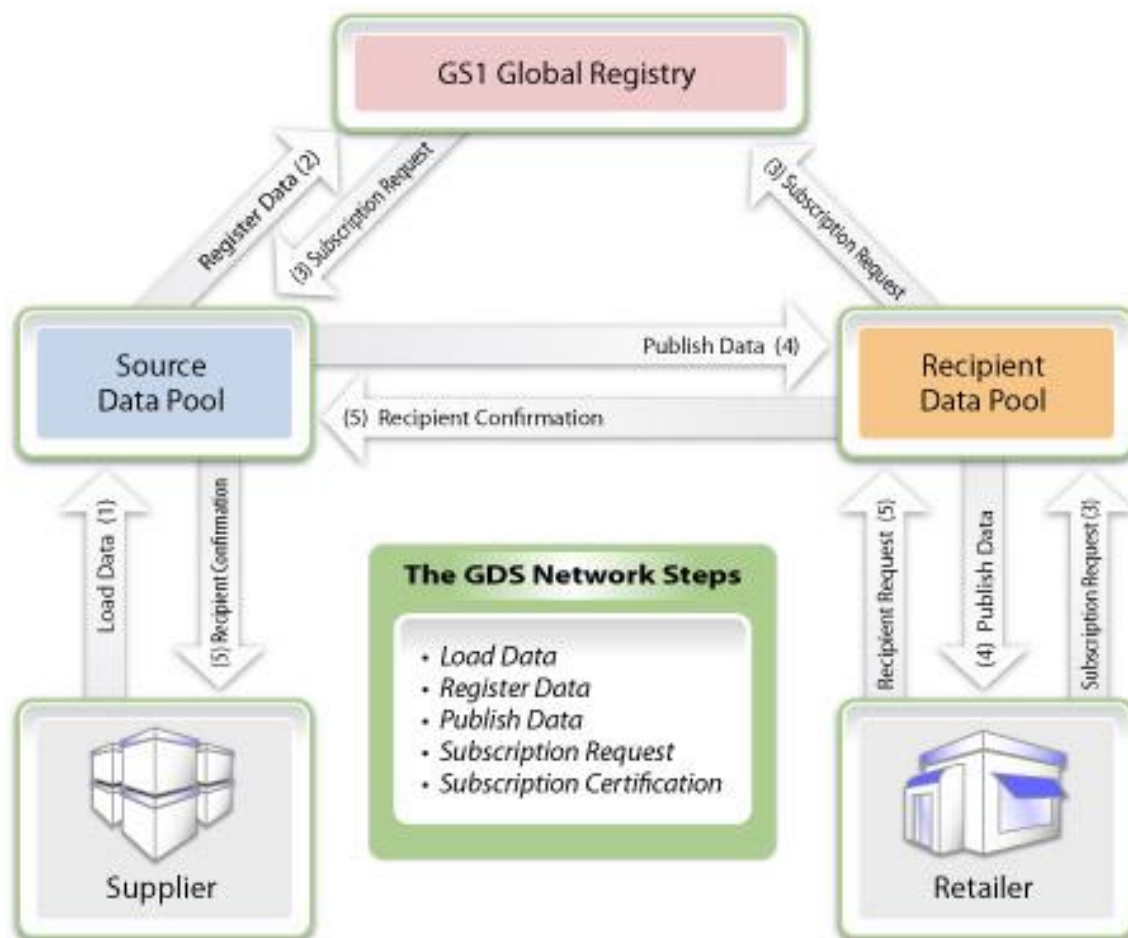
All parties involved are identified by GLN (Global Location Number). Product-related information is communicated by GTIN's (Global Trade Identification Number). For example, the GLN of Albert Heijn is: 8710400000006.

To send EDI messages to retailer's the supplier has to be in possession of a valid *EDI certificate*. This certificate demonstrates that the supplier has sufficient

knowledge and experience of sending specific EDI messages. The certificate can be obtained by contacting GS1. The lead time for the entire certification process is approximately six months, depending on experience. Suppliers who are using Web-EDI by a VAN provider are not required to obtain a valid certificate.

### 3.5.2 GDSN

In order to be able to *synchronize data* of supplier and buyer, the Global Data Synchronization Network (GDSN) has been introduced as an international *data pool* in which suppliers feed information and retailers extract (selected) information. The Global Data Synchronization Network is based on a global standard. As a result, item master-data entered in one place in a GDSN-certified data pool can be passed on to authorized buyers worldwide.



To become a certified member;

- Supplier becomes a member of a GDSN certified data pool.
- Supplier certifies for the data pool and fills the data pool with article data
- Exchange of data is tested and approved
- Data pool is activated and data will be exchanged

In the Netherlands *pricing and commercials* are not yet exchanged via GDSN but through separate documents.

Both, EDI and GDSN are managed and certified by GS1. For the details on the local GS1 organization please contact GS1. (See *chapter 6.5*)

### **3.6 Accreditations and certifications**

Retailers in the Netherlands are not more demanding with regard to audits and accreditations in comparing to other markets. For own label products, some, but very little (unannounced) audits take place.



#### **3.6.1 Organic**

In 2010 a European organic logo was launched by the European Union, as an alternative for all different national trademarks for organic food products. To be able to trade organic products in the Netherlands and use the EU logo, certification of the product and

manufacturing process by EU approved organizations is mandatory. Each market has a (number of) certification bodies that carry out audits and certify food manufacturing processes. Certification takes place in the country of manufacturing, or, in the case co-packing by a 3<sup>rd</sup>. party in the destination market.

#### **3.6.2 Global Food Safety Initiative (GFSI)**

GFSI accreditation as a food safety standard is mandatory for all Albert Heijn suppliers, and other retailers are expected to follow this standard in due course.

GFSI exists of multiple standards of which BRC and HACCP are well known.

Certification and auditing takes place in the country of production and will be carried out by private organizations that have audit accreditation by the BRC organization. Different levels of BRC accreditation apply.



BRC accreditation submitted by Det Norske Veritas (DNV)

### 3.6.3 GlobalGap Certification

Global Gap Certification applies to growers of fresh produce. The GLOBALGAP standard is primarily designed to reassure consumers about how food is produced on the farm by minimizing detrimental environmental impacts of farming operations, reducing the use of chemical inputs and ensuring a responsible approach to worker health and safety as well as animal welfare. This standard is mandatory for Albert Heijn suppliers, and other retailers are expected to follow.

Consumer Groups have a strong influence in the Netherlands and have caused already many changes in retailers operations concerning animal welfare. NGO's heighten awareness of animal welfare issues and pressurize retailers in making changes in their product offering.

## 4 Retailers

In terms of sales growth, supermarkets in The Netherlands were extremely successful in the first decade of the 21st century. In the past ten years, supermarket *turnover increased* with 38%. The combined supermarket turnover has increased from € 22,5 billion to € 32 billion (*Source: ING Economic Bureau*). The Netherlands now counts 4800 supermarkets nationwide, with an average turnover of € 7,928 per m<sup>2</sup>. Comparable to 2009, when the sales growth was 1,6%, supermarkets (and drugstores) are expected to be the only industries to realise sales growth in 2010. This growth, however, will not be substantial. Due to *high price and promotion pressure*, in combination with consumers that are expected to remain cautious, it is not expected that the sales growth will exceed 1% in 2010 (*Source: Distrifood*).

Dutch retailers;

Market share 2009 (*Source Nielsen 2010*)

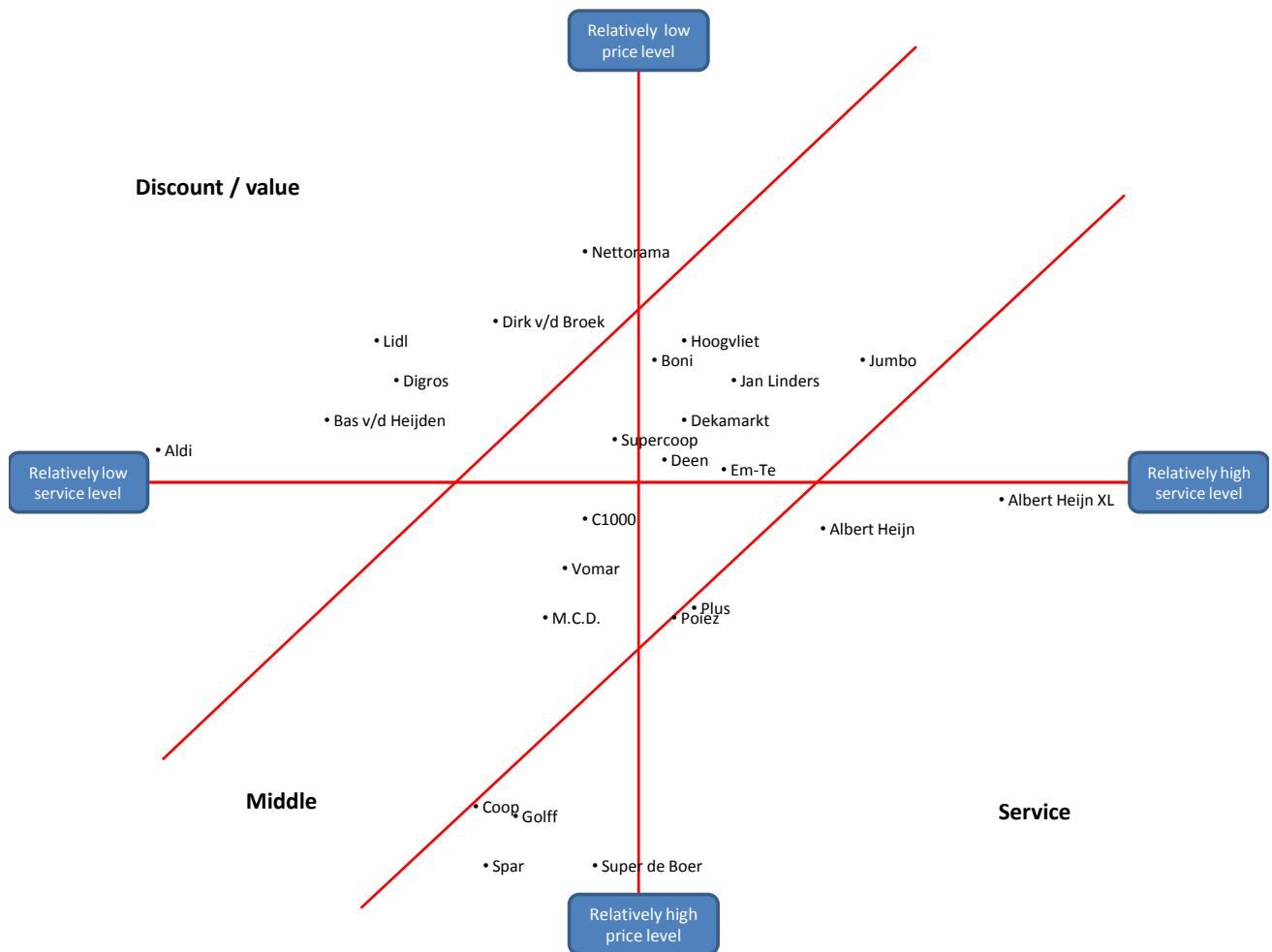
• Albert Heijn	32.8 %
• Bijeen buying group	23.1 %
◦ Jumbo Supermarkets	11.4 %
◦ C1000	11.7 %
• Superunie buying group	29.6 %
• Discounters	
◦ Aldi	8.3 %
◦ Lidl	5.4 %

*KPI's* (Key performance indicators) are not different in the Netherlands in retail in comparison to other markets. Weight can slightly differ per KPI in relation to other markets; mostly due to the fact the supermarkets in the Netherlands are relatively small in size, next to increased emphasis on price.

Most important KPI's are;

- Margin percentage
- Nominal net margin contribution (per cm<sup>2</sup> shelf space)
- Rotation in combination with weighted distribution
- Wastage
- Service level of deliveries to depots

*Open book pricing* is used more often in PL propositions where retailers buyers utilize internal knowledge on ingredient price levels and price fluctuations as well as logistic costs to break down prices of added value products. In case of unexplainable differences, the manufacturer is prompted to explain.



Supermarket positioning grid Price vs. Service, Source GFK panel services June 2010

Note that the *positioning grid* is the situation in retail The Netherlands in the first 6 months of 2010. Given the dynamic nature of developments in supermarket retail in the Netherlands, this is permanent subject to change.

Over the last 5 years, retailers have put more emphasis on *pricing*, due to increased concentration and the desire of retailers to position formats favourable against the competition from a pricing perspective. Part of pressure has been absorbed by retailers themselves, most of it has been pushed down the value chain.

When referring to *retailer's margin percentages*, retailer Albert Heijn utilizes a *different method* in comparison to other retailers in the Netherlands (and the international standard)

Calculation examples on VAT (in this example the lowered tariff) are as follows;

Calculation of VAT and margin on a Retail selling price; (Albert Heijn method)

RSP:	Euro 2,29	
<u>VAT (6%)</u>	<u>Euro 0,13 -</u>	
RSP-VAT	Euro 2,16	(Euro 2,29/1,06)
<u>Margin</u>	<u>Euro 0,86-</u>	(37,8 % over 2,29)
MSP	Euro 1,30	

Calculation of VAT and margin on Retail selling price excluding VAT;

RSP	Euro 2,29	
<u>VAT (6%)</u>	<u>Euro 0,13 -</u>	
RSP-VAT	Euro 2,16	(Euro 2,29/1,06)
<u>Margin</u>	<u>Euro 0,86-</u>	(39,8 % over 2,16)
MSP	Euro 1,30	

Each retailer (except the discounters) invites its suppliers for a year end meeting in which the previous year is reviewed and in which commercials are discussed for the next year.

*Promotional pressure* has increased over the last years, up to nearly 15 percent of total sales value. Branded product manufacturers have seen a promotional value increase to 19 % and expectations are that promotional sales will grow even further. Both, the number of promotions and the promotional discounts are causing this increase. The fact that there is *limited shelf space* available, retailers take a certain risk in delisting a product that they already know and replace it by a product for which they have no experience in performance. Promotional tools, especially during the launch phase are used to take away that risk.

In the last years, retailers have moved to special *theme promotions*, trying to beat each other in creativity and resourcefulness. Branded suppliers are urged to participate and invest heavily in these theme promotions. These theme promotions are only shared shortly before launch and kept secret as long as possible.





C1000 GOGO theme campaign generated enormous uplift in 2009 and was re-launched for the football World championships in 2010

exceptions like Jumbo and some Superunie members. Slots for promotions are in demand. Often suppliers have the desire to promote more often, but just will not get the opportunity from the retailer.

#### 4.1 Albert Heijn



Albert Heijn is a subsidiary of the Ahold group, one of the leading food retailers in The Netherlands as well as one of the country's most recognizable brands. At the end of 2009, there were 826 stores nationwide, operating four main formats; the neighborhood grocery store, the larger Albert Heijn XL supermarket, AH To Go convenience stores, and the AH internet grocer. In 2009 Albert Heijn was responsible for an annual turnover of € 9 billion and counts a market share of 33% in 2010. It *positions* itself as an affordable everyday grocery store where special products are also available. A strong *focus* is placed on fresh products and it has a wide and deep assortment range (12.000 SKU's). Customers are generally highly educated, one or two person households, and young families with children in social class A and/or B.

Albert Heijn has 2 large range change windows, around week 16 and week 36 for ambient and chilled. Frozen range changes take place in week 10 for summer ranges. Smaller changes/ adjustments will take place year round.

##### 4.1.1 Albert Heijn pricing policy

As a full service supermarket, pricing within Albert Heijn is (slightly) *above average* within retail in the Netherlands. Still Albert Heijn is monitoring the competition and will not accept any strong differences within key A brands in destination products.

Albert Heijn distinguishes 3 private label tiers, premium, regular and value own label. Next to this, Albert Heijn also differentiates it' sustainable/organic offering

via Puur en Eerlijk label (translated pure and honest) Value own label (Euro shopper) is sourced through buying organizations AMS. (See chapter 6.6)

Premium label

Regular label

Organic/fairtrade label

Value label

*Margin requirements* with Albert Heijn for own label products differ per category and range from nearly 45 % for chilled and frozen products to 35 % for high rotating ambient products. Please note that Albert Heijn uses a different calculation method. (See *previous information in this chapter*)

#### 4.1.2 Albert Heijn promotional requirements and demands

Albert Heijn has proven fixed tools that are offered to both, branded and own labels suppliers. These tools (see *appendix C*) have a fixed price and running period, and next to negotiating prices, also support mechanics are part of commercial proposition and should be integrated in a commercial offer. Alternative tools are refused as a rule. As a branded supplier, integrating an Allerhande add (see *appendix C*) is mandatory, and can almost be considered as a *listing fee* as, in general, this investment does not provide a similar uplift as other tools do.

The annual value of promotional support ranges between 8 and 10 percent of nett invoiced value for own label propositions and go up to 15 percent for branded products.

#### 4.1.3 Albert Heijn logistic structure

Logistics (and replenishment) within Albert Heijn is very well organized and certainly ahead of the competition in the Netherlands. Albert Heijn utilizes 4 regional depots, 1 slow mover depot and one chilled hub for slow moving chilled products.



Suppliers are asked to supply *directly* to the regional depots. In the case of low rotation or low distribution, or in a launch situation, the slow mover (and chilled) hub will be the *single delivery depot*.



Albert Heijn operates an *automated replenishment system* that feeds orders down the value chain. This system takes different variables into consideration, including weather, time of year, season etc. Suppliers also receive *forecasts* from this replenishment system.

Albert Heijn logistics and replenishment systems are considered ahead of the competition within NL supermarket retail

Albert Heijn depots are very *strict* and goods will have to be submitted in agreed timeslots and according to the agreed terms and quality specifications. If these are not met, the depot will *not accept* the shipment.

Supplying to Albert Heijn requires a very well organized *production and distribution system*. Albert Heijn demands a strong performance with regard to *service levels* and requires a lead time sometimes shorter than 24 hours.

In some occasions, Albert Heijn suggests a familiar 3<sup>rd</sup>. party to meet the requirements as mentioned above.

Office in Zaandam

#### 4.1.4 Albert Heijn, from introduction to launch



After carrying out the analysis as recommended in the previous chapters, Albert Heijn can *be approached*. First contact is the category manager of the specific product group, or the buying department for commodity type products.

Both, buyers and category managers are very *time conscious* and will only allow an one hour timeslot if they are convinced that this is worth the investment. Providing well developed information, preferably by e-mail, will help them responding positively towards agreeing to a meeting. This *pre-information* should include company background as well as some clarity towards the ambitions and the proposition.

When in a meeting and pitching for business, most time should be spent on the *actual proposition* and the *potential* it offers to Albert Heijn. If successful, a second (or 3<sup>rd</sup>.) meeting will take place in which the final negotiations will take place on investments and returns.

After having agreed a listing, a set of *activities* will be triggered to go through all the specifics as mentioned in previous chapters (logistics, packaging, labeling, promotional activities, etc.) This period takes at least 2 months and generates a lot of specific information exchanges.

During the *launch*, Albert Heijn will carefully monitor rotations and promotional uplifts and discuss adjustment of promotional tools if required. After 3 months, an *evaluation meeting* will take place to match actual sales with targets.

## 4.2 Bijeen buying group



Bijeen was officially formed on 4 January 2010 and is the buying group for Jumbo and C1000 supermarkets. This new organization forms approximately 23% of the Dutch market. Bijeen is considered a strong challenger to Albert Heijn.

A new office has been set-up from which all buying activities will take place, utilizing economies of scale. Still, both C1000 and Jumbo will remain different formats using different own labels.

### 4.2.1 Jumbo Supermarkets

In October 2009, Jumbo Supermarkets acquired the Super de Boer group. Due to this, the number of Jumbo supermarkets will grow significantly to some 275 stores at the end of 2011. Jumbo will however not take over all 300 Super de Boer stores; approximately 80 of these will be sold to C1000. Jumbo's market share in 2010 is 11,2%, more than double since the acquisition of Super de Boer. Annual turnover in 2009 amounted to € 1.57 billion and the target is to realize an annual turnover of € 3 billion in 2010. Jumbo Supermarkets are unique in their positioning: they *combine a high service level with discount prices*. Due to their focus on lowest prices, best service, good quality and the largest range, customer profiles are diverse. A large percentage however are families with children. Jumbo exists of partly franchise and partly company owned outlets.

#### 4.2.1.1 Jumbo pricing policy

Jumbo aims to be the *cheapest retailer* in the Netherlands besides discounters as Aldi and Lidl, and monitors A-brand pricing very carefully. Unconfirmed objective is to have around 5 – 10 percent price difference in comparison to full service retailers.

Jumbo's private label is launched, but still in development, premium, regular and value.

Jumbo is changing from regional retailer into a national retailer and this change also causes changes in *margin requirements*. Own label propositions require 35-40 percent margin, whereas branded products require 30-35 percent.

#### 4.2.1.2 Jumbo promotional requirements and demands

Jumbo has *proven fixed tools* that are offered to both, branded and own labels suppliers. These tools have recently been launched (*see appendix D*) and have a fixed price and running period, and next to negotiating prices, also support mechanics are part of commercial proposition and should be integrated in a commercial offer. Displays or other alternatives are accepted.



Jumbo operates double deck trailers to optimize logistics

The annual value of promotional support ranges between 8 and 10 percent of nett invoiced value for own label propositions and go up to 15 percent for branded products. Jumbo promotional support level is slightly higher in relation to invoice value in comparison to Albert Heijn

#### 4.2.1.3 Jumbo logistic structure

Jumbo operates 1 single depot for chilled ambient and frozen. As part of the acquisition of Super de Boer, 2 other depots will be integrated in the Jumbo operation. Ordering and replenishment systems are fairly simple through EDI, and e-mail.

#### 4.2.1.4 Jumbo, from introduction to launch

Commodities, own label propositions and high volume a brands are sourced by the Bijeen buying organization. Added value propositions and new concepts are discussed and agreed with category management, the first port of call. For this, a similar approach is required as stated chapter 4.1.4. Unlike Albert Heijn, Jumbo has more range change moments, and less rigid systems so could act faster once a listing decision has been made.

#### **4.2.2 C1000**



C1000 joined the Bijeen buying group together with Jumbo Supermarkets. Their mission remains unchanged: help the customer save money, time and trouble during daily shopping in a pleasant manner. C1000 is a market follower, as well as a full service supermarket with a wide and undeeep product range. They are in

the process of upgrading, which would lead to more quality, more fresh produce and innovation. Customers are generally families with children, but one and two person households are not excluded. Both are categorized in social class C and D. In 2009, C1000 recorded an annual turnover of € 3.8 billion. Counting more than 370 supermarkets, C1000 is the second largest single format supermarket chain in The Netherlands. In 2010, C1000 has a market share of 14,8%. C1000 is a franchise operated organization.

#### 4.2.2.1 C1000 pricing policy

C1000 as a format offers a smaller range of products, but at good value. A brands are similarly positioned as Jumbo supermarkets, slightly below average prices. C1000 features 2 different own labels, regular and value. Own label propositions require 35-40 percent margin, whereas branded products require 30-35 percent.

**C1000 Selectie**

C1000 regular label



C1000 value label

#### 4.2.2.2 C1000 promotional requirements and demands

Similar as earlier mentioned retailers, C1000 offers a “participation tool list” to its suppliers (see *appendix E*) from which promotional tools can be selected. Some 10 percent of the nett invoiced value is expected to be invested in promotional support. These tools have a fixed fee and running period and are negotiated together with the prices.

#### 4.2.2.3 C1000 Heijn logistic structure

C1000 operates 6 distribution centers. For chilled products, the Breda depot can be used as a hub for delivery to other regional depots. For all other propositions, each regional depot has to be delivered separately. Ordering and replenishment systems are fairly simple through EDI, and e-mail. Order callers are based at C1000 headoffice and are integrated in the category team.

#### 4.2.2.4 C1000, from introduction to launch

Commodities, own label propositions and high volume a brands are sourced by the Bijeen buying organization. Added value propositions and new concepts are

discussed and agreed with category management, the first port of call. For this, a similar approach is required as stated chapter 4.1.4.



### **4.3 Superunie buying group**

Superunie is a buying group that represents 14 independent retailers in The Netherlands. The organization covers the market with more than 1,800 stores and has a market share of 29.6 % in 2010. Superunie's strength can be



explained with the commercial strength of its members in their various local markets. Stores include full service supermarkets and discounters. Many members are leaders in the areas where they are located and are able to compete with powerful national supermarket chains. For an overview of the individual members, please (see *appendix F*)

Due to the nature of Superunie as a buying group, there is added complexity in relation to previously described retailers.

Superunie takes part in the international buying coalition EMD. (see *chapter 5.6*)

Superunie does not avoid long and heavy battles with multinationals, including Coca Cola for an own label dispute

#### **4.3.1 Superunie pricing policy**

Due to the fact that Superunie is a buying group, there is no strict pricing policy from RSP level. Each member is free to determine its price-level and therefore its margin level. The difference in format (from discount to full service) also causes a different pricing positioning. Superunie members have 4 different own labels, which are tendered out just before a contract period is finished. Superunie request a nett-nett price based on the specific terms and specifications as indicated in this contract.

#### **4.3.2 Superunie promotional requirements and demands**

Superunie as a buying group has a fixed set of promotions (see *appendix G*) that will be agreed centrally. After this, still, a promotional program has to be

suggested and agreed with each individual member. This causes a high promotional spend in relation to the nett invoiced sales.

### 4.3.3 Superunie logistic structure

For own label products, Superunie has a central depot in cooperation with a logistic service supplier that acts as a hub for each individual member. This applies to chilled frozen and ambient products.

For the remaining assortment each member has its own depot, ordering and delivery system.

### 4.3.4 Superunie, from introduction to launch

Pitching for business at Superunie is somewhat complicated. Superunie buyers are in constant dialogue with the member buyers on new products, exclusivity agreements and assortment strategy.

Private label business is tendered, and becoming shortlisted for tendering requires first contact by phone or e-mail, without even meeting the buying department. If shortlisted, a tender document will be submitted, and needs to be returned together with samples within a certain timeframe. Volumes, logistics, specifications, etc. are stated in this document. When the price offer is sufficiently competitive, the potential supplier is invited for a first presentation.

For branded products, companies (officially) have to get permission from Superunie to address the members. The buyer will discuss the proposition with the members first and agrees a buy in price and general promotion fee with the potential supplier. Setting up a lobby to members to promote the proposition can be very helpful. Following the approval, each individual member needs to be approached, in which a presentation is made and local promotions are discussed. A member always decides to list the product or not, and for this purpose, the proposition to the member is of equal importance as it is towards the buying group.

## 4.4 Discounters

### 4.4.1 Aldi



At the end of 2010, Aldi counts a market share of 8,3% and 473 stores in The Netherlands. The customer profile includes consumers in social classes C and D as well as “fun” shoppers. It is a subsidiary of Aldi North. Aldi is positioned as a hard discounter with a small and undep assortment with many fancy labels (approx. 800 - 850 SKU's).

#### 4.4.1.1 Aldi pricing policy



Aldi pricing policy is utilizing its international economies of scale and its low cost operation to offer low prices to its customer's. Margins differ strongly per product group and vary from 20 to 35 percent. Quotations to Aldi are always nett-nett and based on specifications as stated in tender documents.

**Strong emphasis Aldi on non food**

#### 4.4.1.2 Aldi promotional requirements and demands

Aldi advertises once a week in national newspapers using non food offers as triggers to generate traffic. No involvement required for suppliers.

#### 4.4.1.3 Aldi logistic structure

Aldi The Netherlands operates regional 9 depots that have to be delivered when in full distribution. Ordering (and all other communication) is done by fax.

#### 4.4.1.4 Aldi, from introduction to launch

Aldi tenders all products and buyers hardly have any dialogue with suppliers. In some cases, a trading relation exists, without even having met the buyer at all. First approach is by telephone to assistant buyers who filter potential suppliers. When shortlisted, potential suppliers are requested to tender for a specific product or product range.

In the case of a new product, a region (linked to a depot) will be selected to test the product. From that point onwards, most contact will be with the depot manager until a national (permanent or in-out) listing is agreed.

Existing suppliers in other markets have easier access.

#### 4.4.2 Lidl



Lidl holds 4,8% of the Dutch market share in 2010 with 328 stores and positions itself as the largest discounter network in Europe. The product range is small and undeeep but they try to follow a “value for money” strategy; customers are generally classified in social class C and D.

##### 4.4.2.1 Lidl pricing policy

Similar as Aldi, Lidl pricing policy is utilizing its international economies of scale and its low cost operation to offer low prices to its customers. Margins differ strongly per product group and vary from 20 to 35 percent. Quotations to Lidl are always nett-nett and based on specifications as stated in tender documents

##### 4.4.2.2 Lidl promotional requirements and demands

Lidl advertises once a week in national newspapers using non food offers as triggers to generate traffic. No involvement required for suppliers.

##### 4.4.2.3 Lidl logistic structure

Lidl operates 5 regional depots in The Netherlands. No inter-depot shuttle so each depot has to be delivered.

##### 4.4.2.4 Lidl, from introduction to launch

Lidl is more approachable then Aldi. Potential suppliers from other markets then the Netherlands need to contact their local Lidl organization (Lidl Ireland) and discuss export potential.

## 5 Additional sources of information and references

### 5.1 Research

#### Nielsen The Netherlands

Diemerhof 2  
1112 XL Diemen  
Tel. +31 20 398 8777  
[www.nielsen.nl](http://www.nielsen.nl)



#### GfK Panel Services Benelux

Middelaan 25  
5102 PB Dongen  
Tel. +31 162 384 117  
[www.gfk.nl](http://www.gfk.nl)



#### Foodstep (out of home)

Hesselink van Suchtelenweg 6  
Wageningen  
+31317 450205  
[www.foodstep.com](http://www.foodstep.com)



#### Synovate (concept food testing, qualitative and quantitative research)

Berghaus Plaza  
Koningin Wilhelminaplein 2-4  
Amsterdam  
+31 20 60 70 707  
[www.synovate.nl](http://www.synovate.nl)



### 5.2 Taxes and duties

#### Dutch Customs Authority

Lan op Zuid 45  
3072 DB Rotterdam  
Tel. +31 10 290 47 47  
[www.douane.nl](http://www.douane.nl)



#### Dutch tax authority

Tel: 31 45 574 30 31  
[www.belastingdienst.nl/english](http://www.belastingdienst.nl/english)



### **5.3 Packaging and labelling**

#### **Foodscore**

Everdenberg 99  
4902 TT Oosterhout  
Tel: +31 16 249 28 22  
[www.foodscore.nl](http://www.foodscore.nl)



#### **Food Authority**

Voedsel en waren-authoriteit  
CentreCourt  
Prinses Beatrixlaan 2  
2595 AL Den Haag  
Tel: +31 70 448 48 48  
[www.vwa.nl](http://www.vwa.nl)



### **5.4 Logistics**

Container Centralen Nederland  
Siriusdreef 2 2  
132 WT Hoofddorp  
+31 235 544020  
[www.container-centralen.nl](http://www.container-centralen.nl)



### **5.5 Electronic Data Exchange**

#### **GS1 Ireland**

The Nutley Building  
Merrion Road  
4 Dublin

Phone: + 353 1 208 0660  
Fax: + 353 1 208 0670

Website: <http://www.gs1ie.org>

Email: [info@gs1ie.org](mailto:info@gs1ie.org)

For the Netherlands please contact;



#### **GS1 The Netherlands**

Visitors; Tourniairestraat 3  
1065 KK Amsterdam

Mail; Postbox 90445  
1006 BK Amsterdam



Phone: +31 20 511 3888

Fax: +31 20 511 38230

Website: <http://www.gs1.nl>

## 5.6 Retailers

### Albert Heijn BV

Provincialeweg 11

1505 MA Zaandam

Tel: +31 75 659 91 11

[www.ah.nl](http://www.ah.nl)



### AMS Sourcing

WTC Schiphol airport D-5

Schipholboulevard 245

1118 BH Schiphol Airport

Tel: +31 20 406 70 58

[www.ams-sourcing.com](http://www.ams-sourcing.com)



### C1000

Databankweg26

3821 AL Amersfoort

Tel: +31 33 453 33 14

[www.c1000.nl](http://www.c1000.nl)



### Jumbo Supermarketen

Rijksweg 15

5462 CE VEGHEL

Tel: +31 413 - 380 200

[www.jumbosupermarkten.nl](http://www.jumbosupermarkten.nl)



### C.I.V. Superunie B.A.

Industrieweg 22-b

4153 ZH Beesd

+31 345 686 622

[www.superunie.nl](http://www.superunie.nl)



### EMD European Marketing Distribution

Churerstrasse 166

CH 8808 Pfaffikon

Switzerland



Tel: +41 55 415 3939  
[www.emd-ag.com](http://www.emd-ag.com)

**Aldi Nederland**

Pascalweg 21  
4104 BE Culemborg  
Tel: +31 345 478 701  
Fax: +31 345 519 383  
[www.aldi.nl](http://www.aldi.nl)



**Lidl Nederland**

Huizermaatweg 45  
1273 NA Huizen  
Tel: +31 35 528 7420  
[www.lidl.nl](http://www.lidl.nl)



## Appendix A Packaging tax calculation model and example

Packaging material	Rate per KG in Eurocents	Grams unit	Grams outercase	Grams outercase per unit	Grams load carriers	Grams load carrier per unit	Tax due per unit
Glass	0,0622	0,00	0,00	0,00	0,00	0,0000	€ 0,0000000
Aluminum or Aluminum alloys	0,8766	2,00	0,00	0,00	0,00	0,0000	€ 0,0017532
Other metals	0,1461	0,00	0,00	0,00	0,00	0,0000	€ 0,0000000
Synthetic material	0,4339	0,05	0,00	0,00	0,00	0,0000	€ 0,0000217
Organic synthetic material	0,0733	0,00	0,00	0,00	0,00	0,0000	€ 0,0000000
Paper and cardboard	0,0733	5,00	250,00	41,60	0,00	0,0000	€ 0,0034158
Wood	0,0194	0,00	0,00	0,00	0,00	0,0000	€ 0,0000000
Other materials	0,1619	0,00	0,00	0,00	0,00	0,0000	€ 0,0000000
General rate (non itemized material)	0,5000	0,00	0,00	0,00	0,00	0,0000	€ 0,0000000
Total:							€ 0,0052



Cheesecake example, packed 6 in cardboard outercase;

- Aluminium tray: 1 gram
- Cardbox sleeve 5 gram
- Plastic film 0,05 gram
- Cardbox outercase 250 grams
- Plastic pallet from pallet pool

## ***Appendix B Crates and Rolly's***



CBL crates in different sizes



CBL Rolly



### ***Appendix C Albert Heijn SL Tariffs 2010***



Demonstrations and samples in the store	2010 rates	Duration	Comments
• Demo in XL (30 stores)	1,500	1 day	Excl. costs for the hosting agency
• Demo in Neighbourhood store (50 stores)	1,500	1 day	Excl. costs for the hosting agency
<b>Online</b>	<b>2010 rates</b>	<b>Duration</b>	<b>Comments</b>
Ah.nl	7,500	2 wks	
• Personalised offers (EDM)			
<b>Web shop promotion</b>			
• Cross-sell module	4,500	4 wks	
• Product shot homepage	4,000	2 wks	
• Product shot category page	2,500	2 wks	
• Checkout buy	2,000	1 wk	
• Web shop sampling (16,000 pieces)	10,000	1 wk	Private customers, inc. listing on the homepage & in the newsletter
• Web shop sampling (22,000 pieces)	12,500	1 wk	Private and business customers

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## AH SL rates 2010



Bonus offers	2010 rates	Duration	Comments
<b>Bonus offers booklet</b>			
• Full page + TV tag-on	144,000	1 wk	
• Full page	99,000	1 wk	
• Half page	69,000	1 wk	2nd placing bijl > 400 stores
	44,000	1 wk	2nd placing bijl < 400 stores
• Product shot	52,000	1 wk	
	33,000	1 wk	2nd placing bijl > 400 stores
			2nd placing bijl < 400 stores
• Radio tag-on	+30,000	1 wk	Additional
• Increased rate	+5,000	1 wk	During theme periods (bv Hamsteren & Feesttoppers)
<b>In-store promotion INS and XL</b>			
• Promotion with special display	33,750	1 wk	2nd placing bijl > 400 stores
• Promotion with special display	21,750	1 wk	2nd placing bijl < 400 stores
• Shelf promotion from 11 SKUs	17,750	1 wk	
• Shelf promotion up to 10 SKUs	12,000	1 wk	
• Bancarella shelf or impulse purchase basket	17,750	1 wk	
<b>In-store promotion XL</b>			
• XL promotion + 2nd placement	6,750	1 wk	
• XL shelf promotion	2,800	1 wk	
<b>In-store promotion AH to go</b>			
• AH to go promotion with display and window poster	11,000	1 wk	
• AH to go promotion with display	7,500	1 wk	

Sources of Inspiration	2010 rates	Duration	Comments
<b>Allehande adverts</b>			
Rates for numbers 1, 2, 4, 5, 6, 8, 9, 10			
• 1/1 page	36,500	n/a	
• 1/2 page	24,750	n/a	
• Premium brand inserts	95,250	n/a	Supply printed material Includes recipe and layout from Allehande editorial team
• Sponsored recipes 1/1 page	40,000	n/a	
Rates for numbers 3, 7, 11, 12			
• 1/1 page	40,000	n/a	
• 1/2 page	27,250	n/a	
• Premium brand inserts	105,750	n/a	Supply printed material Includes recipe and layout from Allehande editorial team
• Sponsored recipes 1/1 page	43,500	n/a	
<b>AH receptikaarten</b>			
• Receptikaarten + web	13,125	2 wks	Including store promotion (1 SKU)

Further information available at [www.ah.nl/samenwerking](http://www.ah.nl/samenwerking)

## Appendix D Jumbo promotional tariffs

### PROMOTIEMOGELIJKHEDEN EN TARIEVEN VOOR 2010

**WEEKTOPPERS IN DAGKLAPPERS** *→ Jumbo*

Met Weektoppers ontdekt de klant elke keer weer nieuw voordeel bij Jumbo. We creëren een 'voordeelmarktgevoel' voor brood, gebak, kaas (verpakt en uitsnij), vleeswaren (verpakt en uitsnij), vis, convenience, AGF, vlees, bloemen & planten, zuivel, diepvries, koek en snoep. Een mooie kans om vooral de impulsopers te raken. De Weektoppers krijgen flink de aandacht in de winkels.

- packshot op vernieuwde website
- aandacht in digitale nieuwsbrief
- 1 week second placing
- 1 week extra aandacht op het schap
- algemene aandacht voor Weektoppers in Mijn Jumbo

**Totaalpakket: € 12.500**

Wat eten we vandaag? Jumbo's groenteman biedt boodschappers een aantrekkelijk geprijsde keuze die van dag tot dag kan verschillen: de Dagklapper. Dagklappers zijn uitsluitend bedoeld voor AGF. U kunt kiezen uit een looptijd van een, twee of drie dagen.

- packshot op vernieuwde website
- algemene aandacht voor Dagklappers in digitale nieuwsbrief
- 1, 2 of 3 dag(en) second placing

**Totaalpakket: € 2.500 per dag**

**DEMO'S** *→ Bureau Boek*

Ons demoteam gaat aan de slag met uw product en nodigt klanten uit het te proberen. Dankzij de probeerprijs of het gratis sample legt u een uitstekende basis voor de markterovering van uw (nieuw) product.

- aandacht op vernieuwde website
- aandacht in digitale nieuwsbrief
- presentatie in unieke stand

Prijs nader te bepalen, afhankelijk van de invulling

**PROEVEN**

Uniforme proeven die uw producten een week lang over de tong laten gaan bij klanten. Bovendien maken wij klanten lekker voor uw product via onze digitale kanalen. Proeven zijn in te zetten voor kaas, vleeswaren, brood, AGF, vlees, vis en vegetarisch.

- aankondiging op vernieuwde website
- aandacht in digitale nieuwsbrief
- professionele instore proeverij

**Totaalpakket: € 1.500 (exclusief verbruikte artikelen)**

**LOCAL MARKETING: BOODSCHAPPENDOOS**

Klanten van Jumbo willen we gaan verwennen met een goed gevulde boodschappendoos. Voor 2010 verwachten we 200.000 dozen in te zetten bij nieuwe openingen en andere local marketingactiviteiten. Bovendien wordt uw product vermeld in de folder.

*over 4,5 mln te bereiken S&B winkels*

- participatie middels gratis product

**LOCAL MARKETING: KRASACTIE**

Deze speciale local marketingactiviteit heeft een looptijd van 1 week en vindt twee maal per jaar plaats (voorjaar en najaar). De kraskaart wordt huis-aan-huis verspreid en biedt de consument een winkans van 1 op 3 op uw product. Uw product en logo worden vermeld op de kraskaart en het winkelmateriaal.

*ALTIJD PRIJS!*  
*2 miljoen GRATIS winkels*  
*KRAS IE PAKJE!*  
*Jumbo always geeft 10% GRATIS*  
*Kras's pakje open en win!*

- participatie middels gratis product

### PROMOTIEMOGELIJKHEDEN EN TARIEVEN VOOR 2010

**JUMBODEALS! (4 WEKELIJKS)**

Als bewijs dat Jumbo voor de dagelijkse boodschappen echt elke dag goedkoop is, zetten we JumboDeals! in. Met afprijzingen als 2x gratis en ronde prijzen (op hele, halve of kwart euro) trekken we klanten die uit zijn op een superdeal. Ook hier zijn mogelijkheden voor uw commerciële creativiteit, wij staan open voor uw ideeën! Extra instore acties met producten in de grootste winkels met afwijkende (groot)verpakkingen zijn mogelijk.

- Duidelijke vermelding en afbeelding in Mijn Jumbo
- 1 week second placing
- vermelding op vernieuwde website
- aandacht in digitale nieuwsbrief
- winkelmateriaal

**Totaalpakket: € 30.000**  
**Rond pasen en kerstmis: € 35.000**

**NIEUW!**

Bij een groot assortiment hoort 'n snelle opname van producten. Door de nieuwe inkoopcombinatie BIJEN hebben we daar de mogelijkheden voor. Daarom krijgt NIEUW! een belangrijke plaats binnen Jumbo.

- packshot in Mijn Jumbo
- 4 weken lang markeringskaart
- opvallende markeringschap
- aandacht op vernieuwde website
- aandacht in digitale nieuwsbrief

**Totaalpakket € 15.000**

**Bovenstaand pakket + 4 weken op second placing in Nieuwmetre in de grootste winkels**

**Totaalpakket € 25.000**

*Start 60 weken → vol door nu geleidelijk toe nemen*

**MIJN JUMBO (4 WEKELIJKS)**

Uit onderzoek van GfK blijkt dat ons magazine Mijn Jumbo bijzonder goed gewaardeerd wordt. De huidige oplage van zo'n twee miljoen exemplaren wordt de komende jaren met vrijwel elke nieuwe winkelopening verhoogd, en u weet dat er heel wat openingen op stapel staan. Nu het blad Boodschappen is weggevallen kan Mijn Jumbo op nog meer geïnteresseerde lezers rekenen.

• 2/1 pagina advertentie:	€ 55.000	• packshots los:	€ 7.500
kerst- of paaseditie:	€ 65.000	• trial coupon (uitsluitend in combinatie 1/1 advertentie):	€ 60.000
• 1/1 pagina advertentie:	€ 30.000	• insert boekje Mijn Jumbo vanaf:	€ 150.000
kerst- of paaseditie:	€ 35.000		
• 1/2 pagina advertentie:	€ 17.500		
kerst- of paaseditie:	€ 20.000		
• 1/1 pagina advertorial:	€ 32.500		
• 1/1 pagina gemaksrubriek:	€ 30.000		

**INSPIRERENDE THEMA'S (4 WEKELIJKS)**

Samen gaan we consumenten verrassen met wisselende, overkoepelende thema's per 4 wekelijkse periode. De thema's voor zowel DKW als vers zijn nog niet vastgesteld, maar denk aan bijvoorbeeld schoonheidsweken (innerlijk en uiterlijk), picknick, ontbijt of ferig van vakantie. Denk mee en draag binnen het thema activiteiten aan die bij uw producten passen. Een gedifferentieerde aanpak voor grote en kleine winkels behoort tot de mogelijkheden. Onze grote landelijke thema-acties bieden uw product een spetterend podium. We verleiden consumenten om nieuwe producten te proberen, nemen ze mee in ons verhaal en brengen opnieuw de 7 Dagelijkse Zekerheden onder de aandacht. Binnen het elke vier weken wisselende thema. Denk mee en draag uw ideeën aan!

- participatie in themapagina's of speciale themacoupons in Mijn Jumbo
- vermelding op vernieuwde website
- aandacht in digitale nieuwsbrief
- opvallend winkelmateriaal

**Totaalpakket: € 40.000**

**advertentiepagina Mijn Jumbo in combinatie met trial coupon**

**Totaalpakket: € 60.000**

## Appendix E C1000 promotional tariffs

## Appendix F Superunie members



**Boni-Markten B.V.**  
Edisonstraat 2  
3861 NE Nijkerk  
Postbus 1093  
3860 BB Nijkerk  
Tel: 033-2473131  
Fax: 033-2473141  
[www.bonisupermarkt.nl](http://www.bonisupermarkt.nl)



**Boon Beheer B.V.**  
Marisstraat 2  
3364 AZ Slidrecht  
Postbus 235  
3364 AE Slidrecht  
Tel: 0184-418500  
Fax: 0184-412159  
[www.mcd-supermarkt.nl/](http://www.mcd-supermarkt.nl/)



**Coop Holding B.V.**  
Markweg 8  
6883 JM Velp  
Postbus 87  
6880 AB Velp  
Tel: 026-7999666  
Fax: 026-7999600  
[www.coop.nl/](http://www.coop.nl/)



**Deen Supermarkten B.V.**  
Kernweg 4  
1627 LC Hoorn  
Postbus 139  
1620 AC Hoorn  
Tel: 0229-252100  
Fax: 0229-252102  
[www.deen.nl/](http://www.deen.nl/)



**Detailresult Groep N.V.**  
Olieweg 6  
1951 NH Velzen-Noord  
Postbus 86  
1940 AB Beverwijk  
Tel: 0251-276600  
Fax: 0251-276680  
[www.detailresult.nl](http://www.detailresult.nl)





**Hoogvliet Super B.V.**

Eikenlaan 265  
2404 BP Alphen a/d Rijn  
Postbus 434  
2400 AK Alphen a/d Rijn  
Tel: 0172-418218  
Fax: 0172-421074  
Fax: 0172-422593 (inkoop)  
[www.hoogvliet.com/](http://www.hoogvliet.com/)



**Jan Linders B.V.**

De Flammert 1211  
5854 NC Bergen (L)  
Postbus 72  
5854 ZH Bergen (L)  
Tel: 0485-349911  
Fax: 0485-342284  
[www.janlinders.nl/](http://www.janlinders.nl/)



**B.V. Nettorama Distributie**

Wilhelminakanaal Zuid 120  
4903 RA Oosterhout  
Postbus 182  
4900 AD Oosterhout  
Tel: 0162-455950  
Fax: 0162-456520  
[www.nettorama.nl/](http://www.nettorama.nl/)



**Poiesz Supermarkt B.V.**

Edisonstraat 3  
Industrieterrein Houkesloot  
8606 JH Sneek  
Tel: 0515-428800  
Fax: 0515-428801  
[www.poiesz-supermarkten.nl/](http://www.poiesz-supermarkten.nl/)



**Sanders Supermarkt B.V.**

Ir. Hanlostraat 15  
7547 RD Enschede  
Tel: 053-4848500  
Fax: 053-4848501  
[www.sanders-supermarkt.nl/](http://www.sanders-supermarkt.nl/)





**Sligro Food Group Nederland B.V.**

Corridor 11  
5466 RB Veghel  
Postbus 47  
5466 RB Veghel  
Tel: 0413-343500  
Fax: 0413-341520  
[www.sligro.nl/](http://www.sligro.nl/)



**Spar Holding B.V.**

Tradeboulevard 2G  
4761 RL Zevenbergen  
Postbus 147  
4760 AC Zevenbergen  
Tel: 0168-357900  
Fax: 0168-357999  
[www.spar.nl/](http://www.spar.nl/)



**B.V. Sperwer Holding**

Utrechtseweg 340  
3731 GD De Bilt  
Postbus 21  
3730 AA De Bilt  
Tel: 030-2219211  
Fax: 030-2202074  
Fax: 030-2204794 (comm.)  
[www.plus.nl/](http://www.plus.nl/)



**Vomar Holding B.V.**

Opaalstraat 15  
1812 RH Alkmaar  
Postbus 1100  
1810 KC Alkmaar  
Tel: 072-7502200  
Fax: 072-7502400  
[www.vomar.nl/](http://www.vomar.nl/)



## Appendix G Superunie promotional tariffs

### Thema's Boodschappen 2010

nr.	thema
1	Back to basic
2	Verlangen naar de zon
3	Culinaire lentekriebels
4	Vorstelijk voorjaar!
5	Nieuwe oogst
6	Buiten eten
7	De koele keuken
8	Culinair gemak
9	Lekker weer thuis
10	Landelijk genieten
11	Smakelijke surprises...
12	Kerst: samen genieten

### Algemene gegevens

**Titel:** Boodschappen

**Jaargang:** 2010

**Uitgever:** C.I.V. Superunie B.A.  
Postbus 80  
4153 ZH Beesd  
(0345) 68 66 66

**Telefoon:** Mikel Trommelen  
trommelen@superunie.nl

**E-mail:** C.I.V. Superunie B.A.  
12 x per jaar

**Oplage:** HOI 2008:  
Totaal verspreide oplage:  
2.233.516 exemplaren  
Voor meer informatie  
zie HOI (www.HOI-online.nl)

**Distributie:**

Boni-Markten B.V.  
Boon B.V.  
Boon B.V. (MCD)  
CoopCade Holding B.V.  
(Coop, SuperCade, CoopCompact)  
Deen Supermarkten B.V.  
Hoogvliet Super B.V.  
Jan Linders B.V.  
Kijkrijp DeMaakt N.V.  
B.V. Nettonoma Distributie  
Ponsz Supermarkt B.V.  
Sander Supermarkt B.V.  
Sligo Food Group Nederland B.V.  
(Giffi, EM-TE)  
Spar Holding B.V. (Spar, Attent)  
B.V. Sparwink Holding (Fusa)  
Vomar Holding B.V.

### Technische gegevens

**Drukproceede:** cover : full colour / rotatiecylind  
binnenwerk : full colour / diepdruk

**Papier:** cover : 115 grams h/mc  
binnenwerk : 60 grams h/mc

**Afwerking:** gebrocheerd met 2 rietjes

**Ontvang:** gemiddeld 88 pagina's

**Formaten:** 1/1 pagina : 222 x 285 mm (afspanel)  
1/2 pagina : 111 x 142 mm (afspanel)  
1/4 pagina : 55 x 71 mm (afspanel)  
1/8 pagina : 27 x 35 mm (afspanel)

- Afopende pagina's aanleveren met rondom 5 mm overfill.  
- Advertoria's in overige maten en inserts in overleg.  
- Alleen 1/1 pagina's kunnen afopend worden geplaatst.

**Advertentiemateriaal:**  
Aanleveren van advertenties volgens de standaard Certified  
PDF 600 dpi, CMYK, conform ISO standaard PDFX-1a:2001  
inclusief kleurproof met diepdruk specificatie.

Voor de juiste specificaties van de profielen verwijzen  
wij u door naar de website van eci: [www.eci.org](http://www.eci.org)

**Certified PDF + lowres PDF naar:**  
[naadaverbeek@mcp.nl](mailto:naadaverbeek@mcp.nl)

**Kleurproof per post naar:**  
MCP Bv, t.a.v. Nanda Verbeek  
Postbus 631, 7000 AP Doetinchem  
Telefoon: (0314) 32 75 23

**Voorwaarden**  
Alle producten die in een advertentie genoemd en/of afgebeeld  
worden moeten verkrijgbaar zijn bij 70% van de leden die  
Boodschappen verspreiden. Indien niet aan deze voorwaarde  
wordt voldaan zal Superunie een eerder aangeleverde advertentie  
opnieuw plaatsen en het afgesproken bedrag bij u in rekening  
brengen. Indien er geen afgesproken bedrag is, wordt het bedrag  
dat u heeft betaald voor de afgeleverde advertentie zonder plaatsing in rekening  
gebracht worden.

Een advertentie kan tot uiterlijk 10 dagen voor plaatsing  
schriftelijk worden geannuleerd. Indien opzegging niet als  
bovenstaand geschiedt, wordt 10% van de advertentieprijs in  
rekening gebracht. Indien de annulering na de aangegeven  
sluitingsdatum geschiedt, wordt 100% van de advertentieprijs  
in rekening gebracht.

Tarieven zijn gebaseerd op de thans geldende papierenprijs.  
Indien de oplage wijzigt, zal het advertentietarief evenredig door-  
belast worden. Papersoorten en formaten zijn onder voorbehoud.

## ***Appendix H Used abbreviations***

BTW	Belasting Toegevoegde Waarde, Dutch Translation for VAT, (see also VAT)
BRC	British Retail Consortium, trade organization for the UK retail industry
CBL	Centraal Bureau Levensmiddelen, trade organization for the Dutch supermarket retail industry
CHEP	Commonwealth Handling Equipment Pool
EAN	European Article Numbering,( see also GTIN)
EANCOM	EAN Communication
EDI	Electronic Data Interchange
EU	European Union
GDSN	Global Data Synchronization Network
GFSI	Global Food Safety Initiative
GLN	Global Location Number
GLOBALGAP	Global Good Agricultural Practice
GTIN	Global Trade Identification Number, formerly known as EAN, (see also EAN)
HACCP	Hazzard Analysis of Critical Control Points
KPI	Key Performance Indicators
MSP	Manufacturers Selling Price
NGO	Non Governmental Organization
RSP	Retailers Selling Price
SKU	Store Keeping Unit
THT	Tenminste Houdbaar Tot, Dutch translation for Use By Date
VAT	Valua Added Tax, English translations for BTW, (see also BTW)
VWA	Voedsel en Waren Autoriteit, Dutch equivalent for the Food safety authority