



## Emmi Investor Day

Highway to hell – or to heaven?

Thomas Morf  
Chief Marketing Officer  
Emmi Group

Lucerne, 7 November 2018



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## **We live in a VUCA world**

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Focus on global brands

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A new way to approach innovation

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The digital marketing revolution

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A new global marketing model @ Emmi

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Let's summarise

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## We live in a VUCA world



1. Consumer and food trends
2. Our market position(s)
3. Marketing capabilities

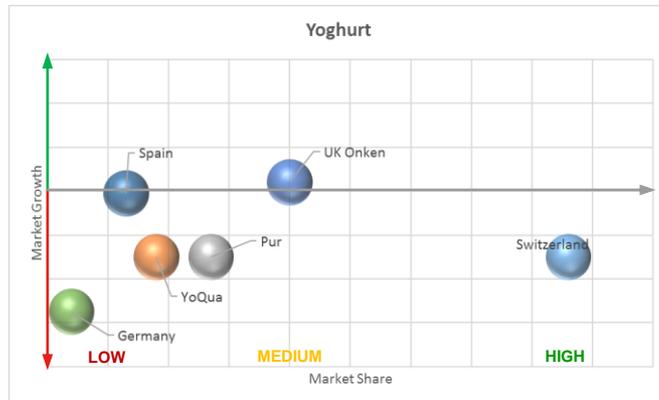
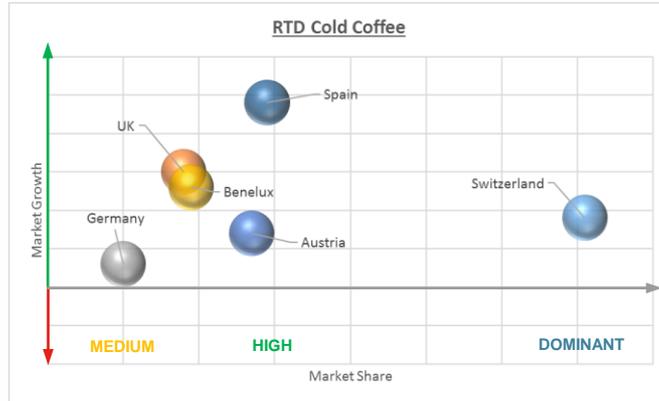
# 1. 10 Consumer and food trends



## 2. Market positions of Emmi's brands



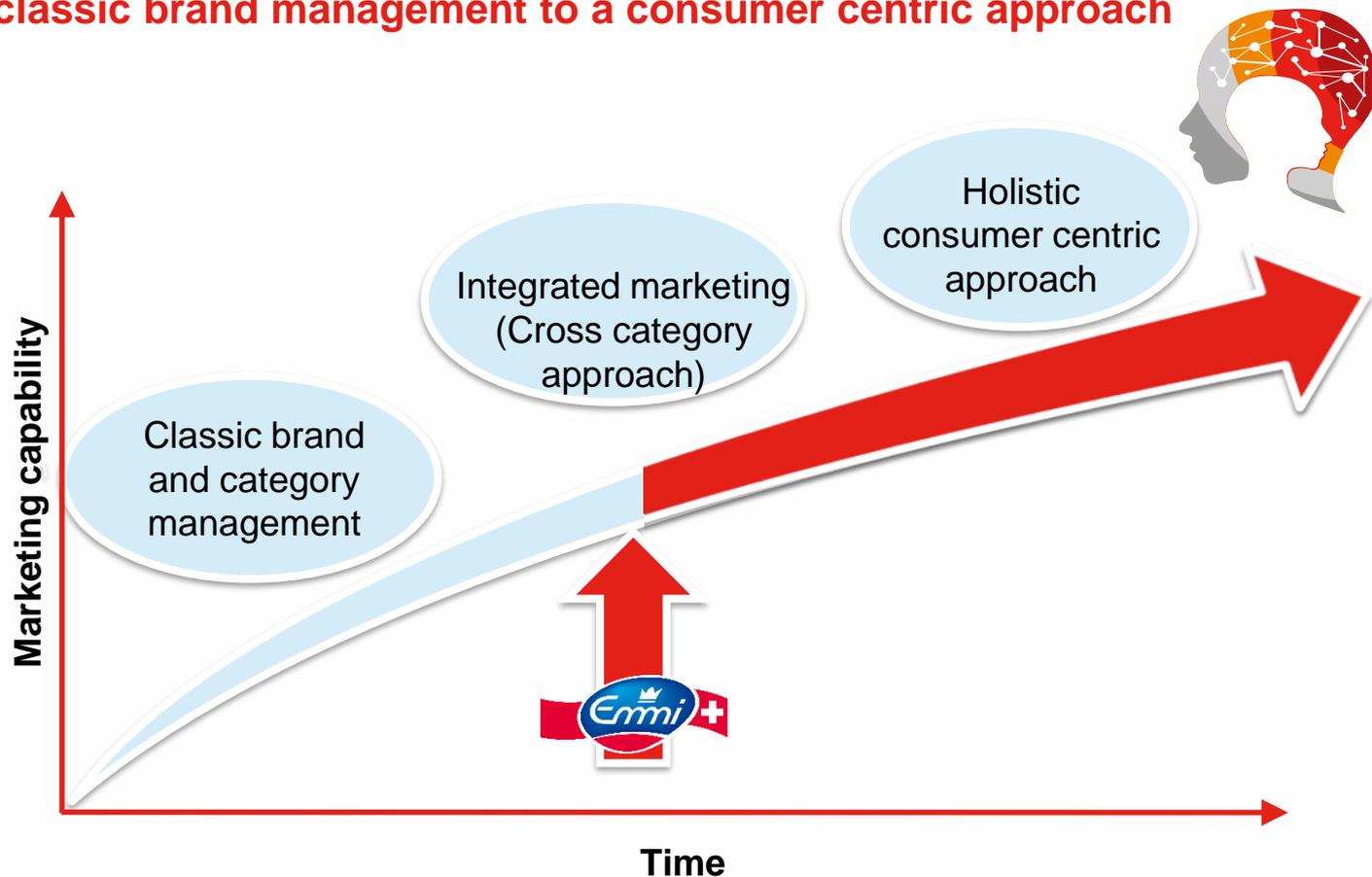
### Dominant on ECL and solid positions on yoghurt, cheese and desserts



### 3. Emmi marketing capabilities



## From a classic brand management to a consumer centric approach





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## What is my responsibility @ CMO Emmi

-  The driver of the Emmi portfolio shift towards branded business
-  The strategic guide for all Emmi brands
-  The leader of the global marketing team and our global brands
-  The enabler of Emmi's marketing capabilities
-  The finger on the pulse of time, the market and society for Emmi
-  The voice of the consumer in the Emmi board
-  The ROMI challenger



WHY

we are the **growth catalyst** and the **guardian**  
of Emmi's **brand moments**.  
connected to **life, people** and the **future**

WHAT

01



**Global  
brands**

02



**Cross-category  
innovation**

03



**Digital  
marketing**

HOW

**Emmi Marketing 40**



## The Best Dairy Moments are Emmi Moments

Best Coffee Experience	Refining the Best	Daily Best	The Best Dairy from Switzerland	Tastiest Reward	Optimised Self	Better World
 <b>CAFFÈ LATTE</b>		   	 <b>FONDÜ</b>  <b>Raclette</b>	<b>Rachelli</b>   	   	<b>GLÄSERNE MOLKEREI</b>  
 <b>CAFFÈ LATTE</b>	 	 	   <b>SWISS PREMIUM YOGURT</b>	  <b>Moments</b>	  	    <b>GreenValley CREAMERY</b>  <b>BEGETAL</b> <small>BEHEALTHY. BEHAPPY.</small>



WICHTIG IST,  
WAS DRIN IST.

## Actually, it's cold...

Donnerstag, 04.08.2016

### FINANZ und WIRTSCHAFT

Preis und Vertrieb: Löss  
9503 Zürich  
Tel. 043 28 00  
www.nzz.ch

Verantwortl. Red.: Peter Brühmann  
Redaktionschef: Peter Brühmann  
Zürcherstrasse 24, 8001 Zürich  
Tel. 043 28 00

Seite 3  
Preis: 2.04 CHF inkl. MwSt.

Anfang: 09:00 Uhr  
Themen: 382.050

Referenz: 11042810  
Abdruck: Seite 1-5

#### Kaffeehersteller wachsen in die Breite

INTERNATIONAL. Ungerer Origin, Propaganda, Cold Brew – Nordic, Starbucks und hier auch Coca-Cola übergreifen Wachstum und Margen durch Diversifizierung.

Mit Blue Bottle Coffee hat sich Nestlé Fachwissen und Erfahrung im Premium-Segment eingekauft.



Coca-Cola buys Costa Coffee  
Whitbread for £3.9bn

7,1 MILLIARDS CHF

Nestlé Starbucks COFFEE

GASPARD KÜHN  
RTS INFO CHEF RUBRIQUE ECONOMIQUE



'Other suitors weren't wearing the right suit or driving the right car' - Alison Brittain

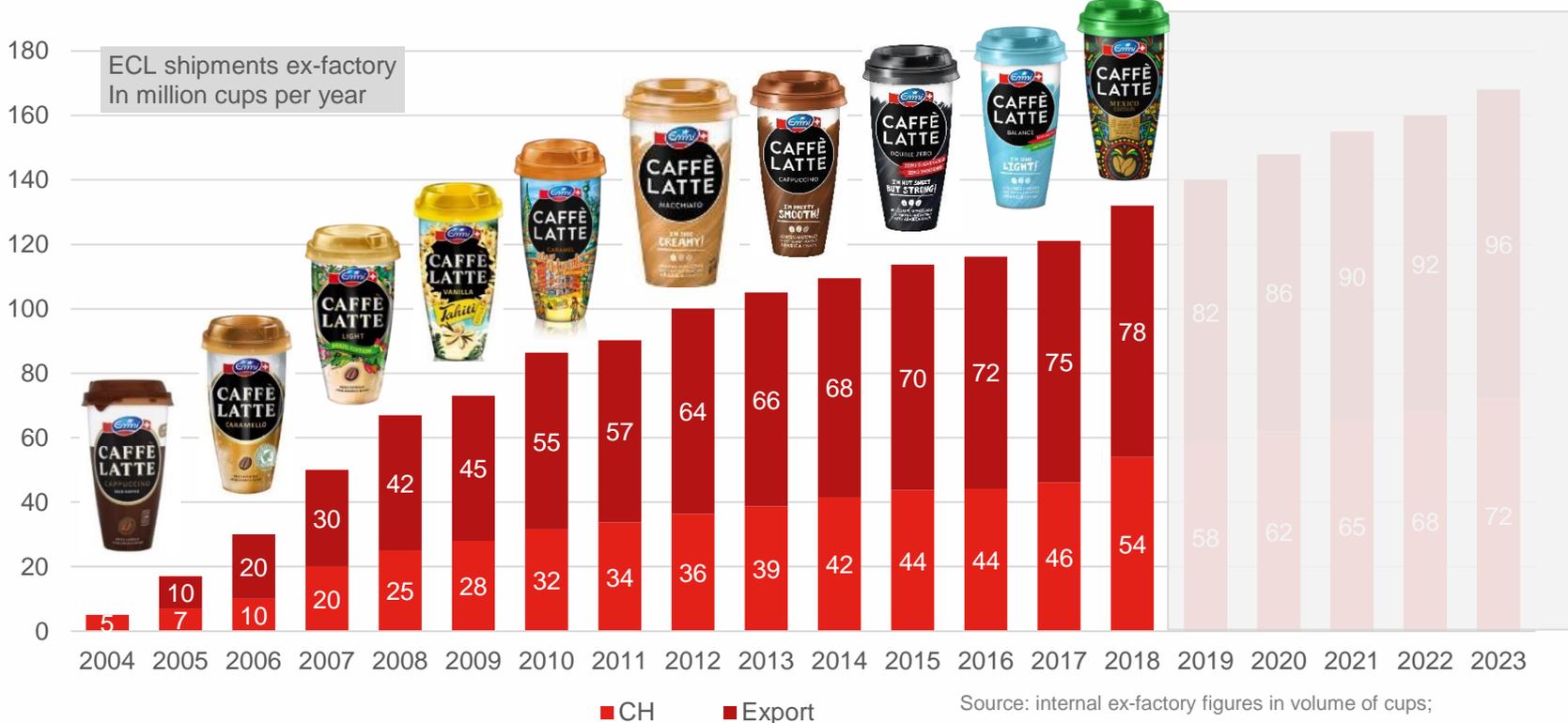


# DER KAFFEE-KRIEG

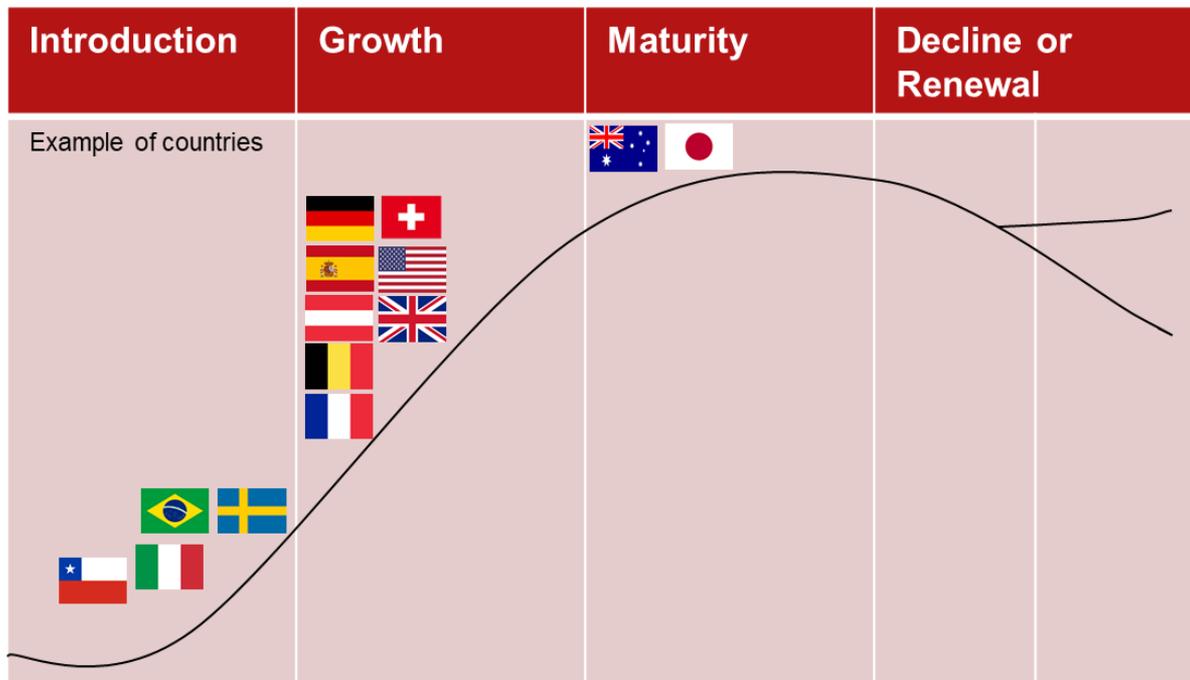
Nestlé Der Kaffee-Platzhirsch kämpft neuerdings mit potenter Konkurrenz. Denn hier winken heisse Renditen.

— DER ARBEITSMANN

## ECL: more than 130 million cups sold in 2018



## There is still major potential in the RTD coffee market

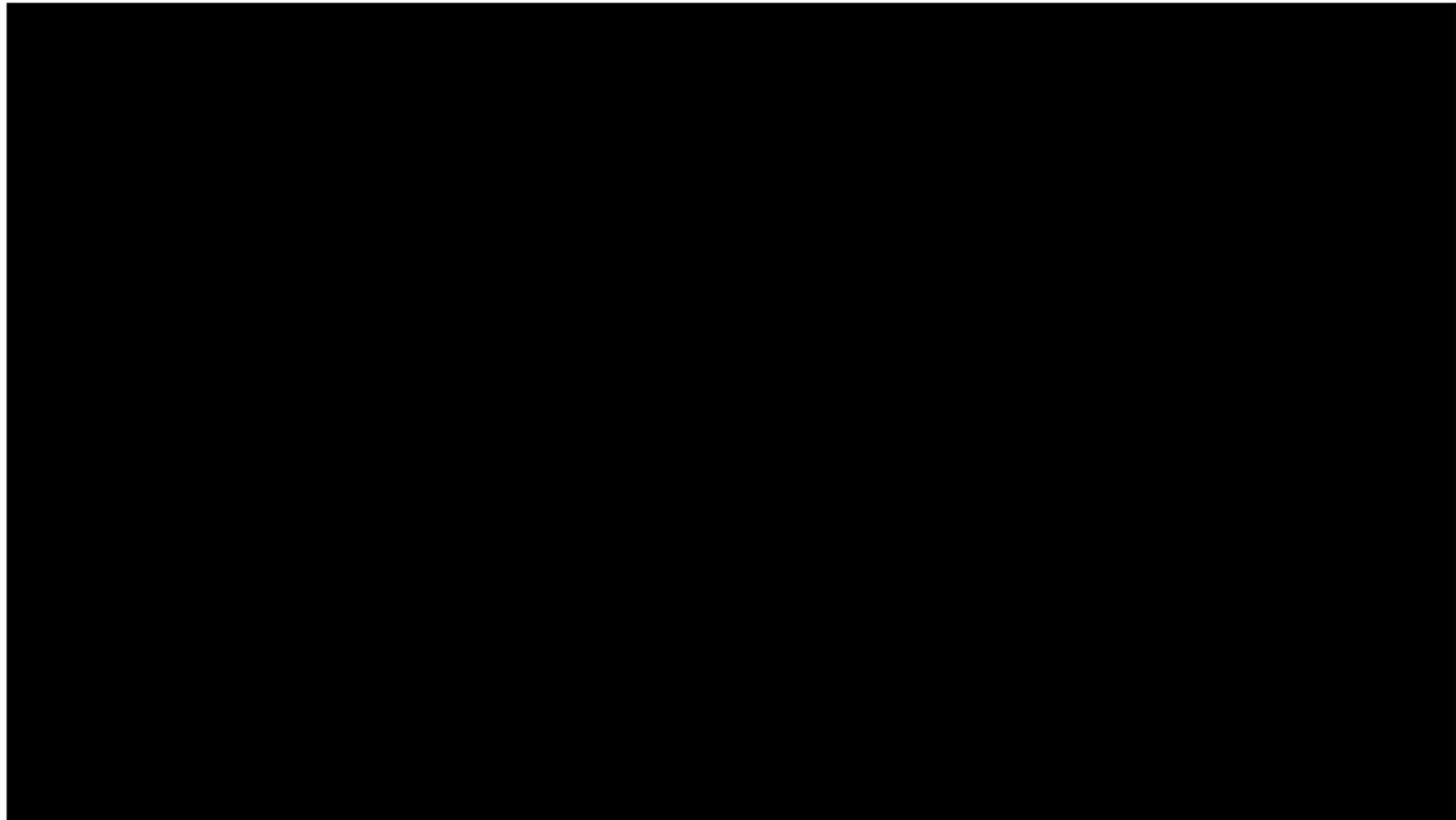


Per-capita consumption in litres (p.a.)	Hot coffee 	RTD Iced Coffee 
Germany	90	2
Switzerland	71	4
USA	68	2
Spain	41	0.4
UK	28	0.2
Japan	18	22 (sic!)

Source: Euromonitor // Brewing up the Future: RTD Coffee in 2017 ; PCC Hot Coffee in Cups → Calculated to Litres <https://qz.com/166983/where-the-worlds-biggest-coffee-drinkers-live/>

## Our ECL journey: From a lifestyle focus to a quality experience



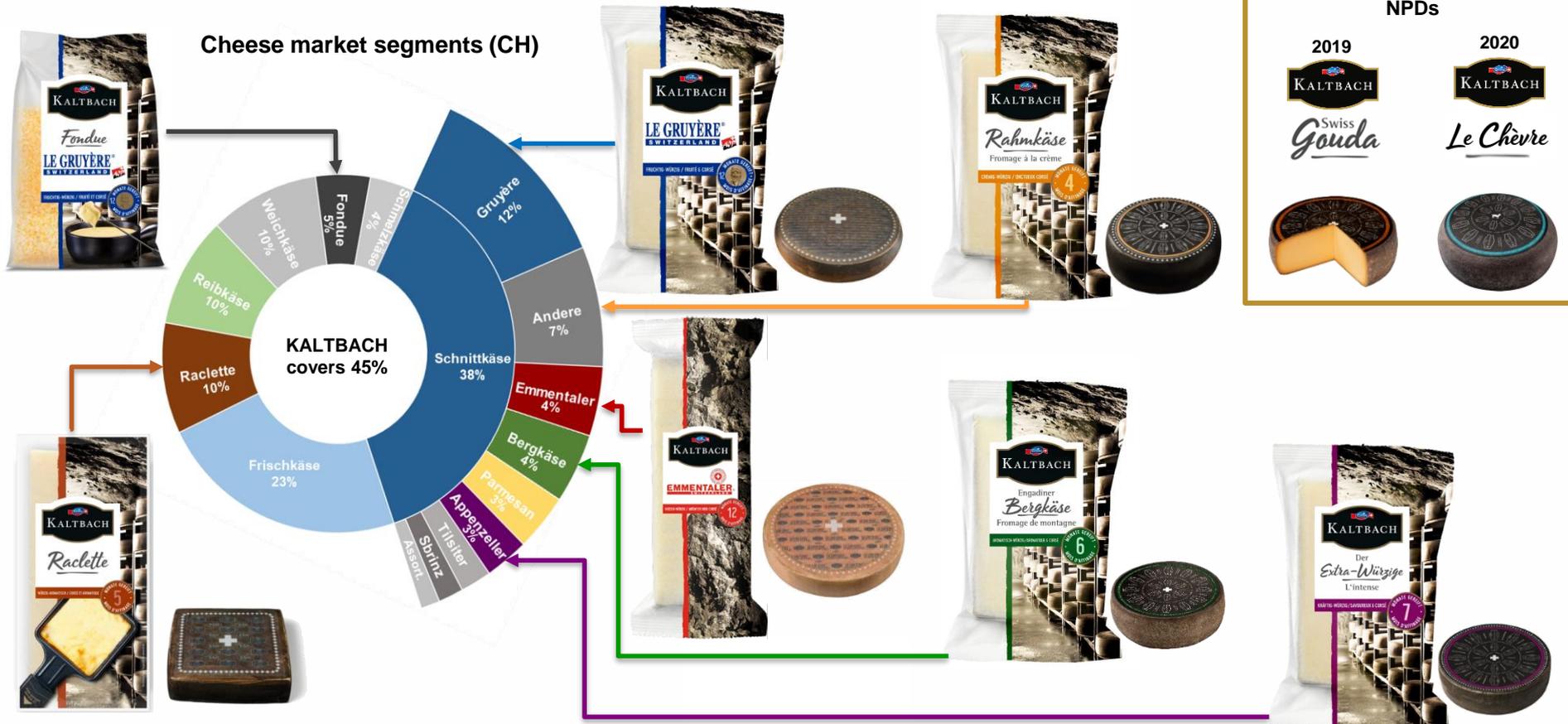




# Best cheese selection out of most important segments



Cheese market segments (CH)



NPDs

2019	2020
 Swiss Gouda	 Le Chèvre

The Maîtres of KALTBACH and the unique cave refine the best cheese into a masterpiece



## Maîtres of KALTBACH

The master craftsmen are in charge of strict selection, dedicated care and refinement

Veredelt von  
Höhle und Meister.

## KALTBACH cave

A wonder of nature provides the ideal natural climate to refine a world-class cheese

## KALTBACH cheese

Only the best quality cheese gets into the cave to get an excellent, distinctive taste

## New look & feel:

### FROM



Mysterious, idyllic, stylized

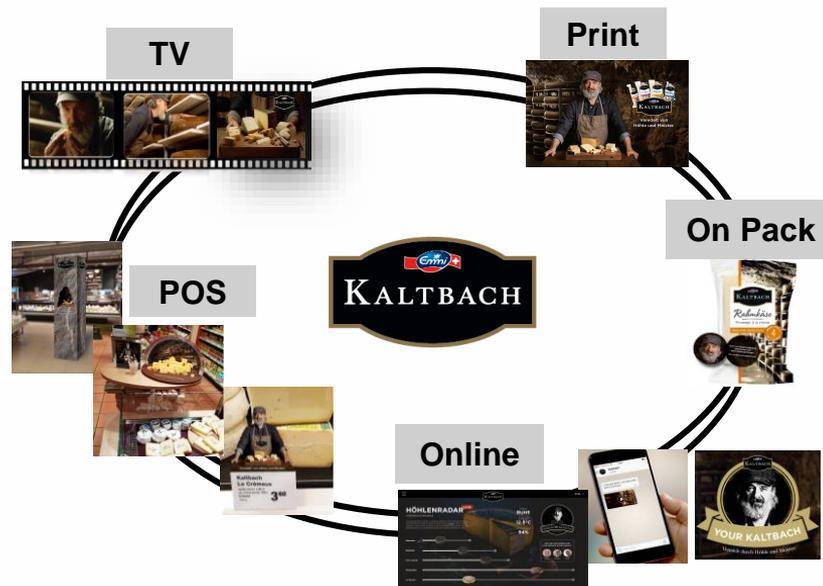
### TO

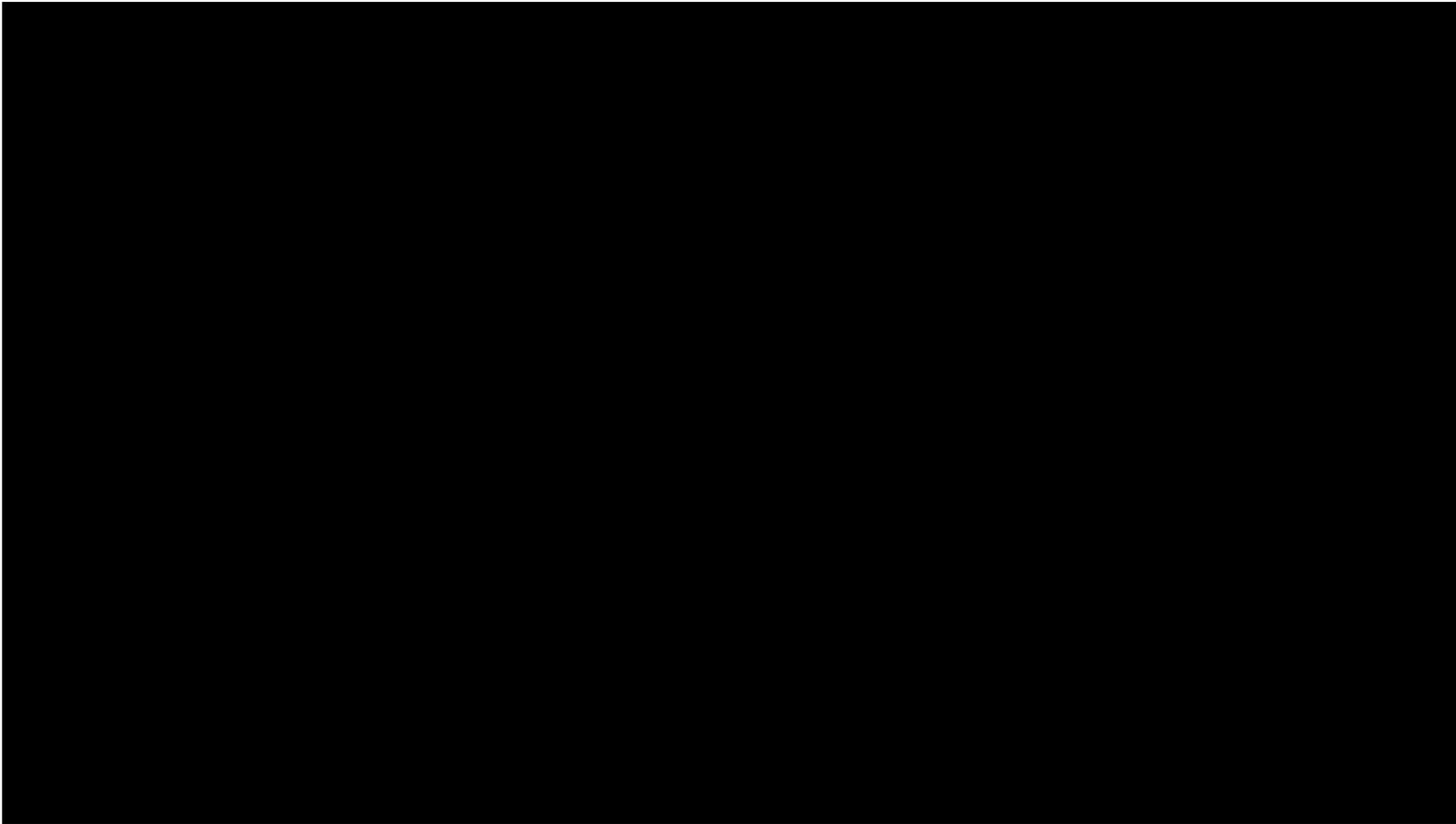


Modern, authentic, natural with stronger focus on craftsmanship



## 360° Campaign:







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## A consumer centric approach is crucial for generating sustainable concepts

From  
“overall food”  
to  
“category”  
to  
concept”

**Understanding of  
fundamental needs,  
drivers & barriers of the  
consumer leads to ideas  
and further to concepts.**



# We identified seven key growth fields for the future



Each growth field refers to a mega trend in the food sector



**THE NEW COFFEE  
EXPERIENCE**



**CASUAL FOOD**



**NEW  
FUNCTIONAL**



**FOOD AS IT  
SHOULD BE**



**INDULGENT ME  
TIME**



**PLANT BASED**



**PERSONALIZED  
FOOD  
SOLUTIONS**



## Our innovations along the growth fields



THE NEW COFFEE EXPERIENCE



CASUAL FOOD



NEW FUNCTIONAL



FOOD AS IT SHOULD BE



INDULGENT ME TIME



PLANT BASED



PERSONALIZED FOOD SOLUTIONS





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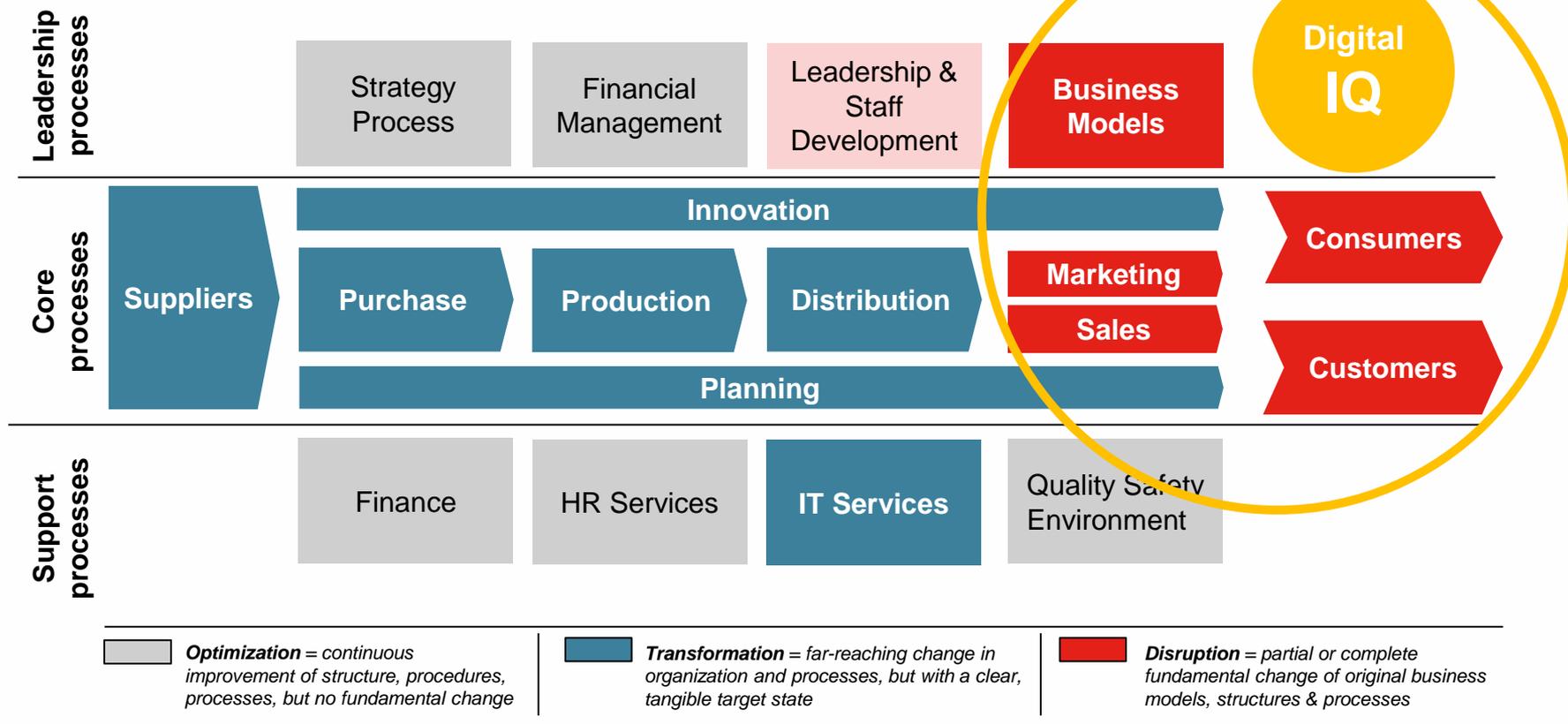
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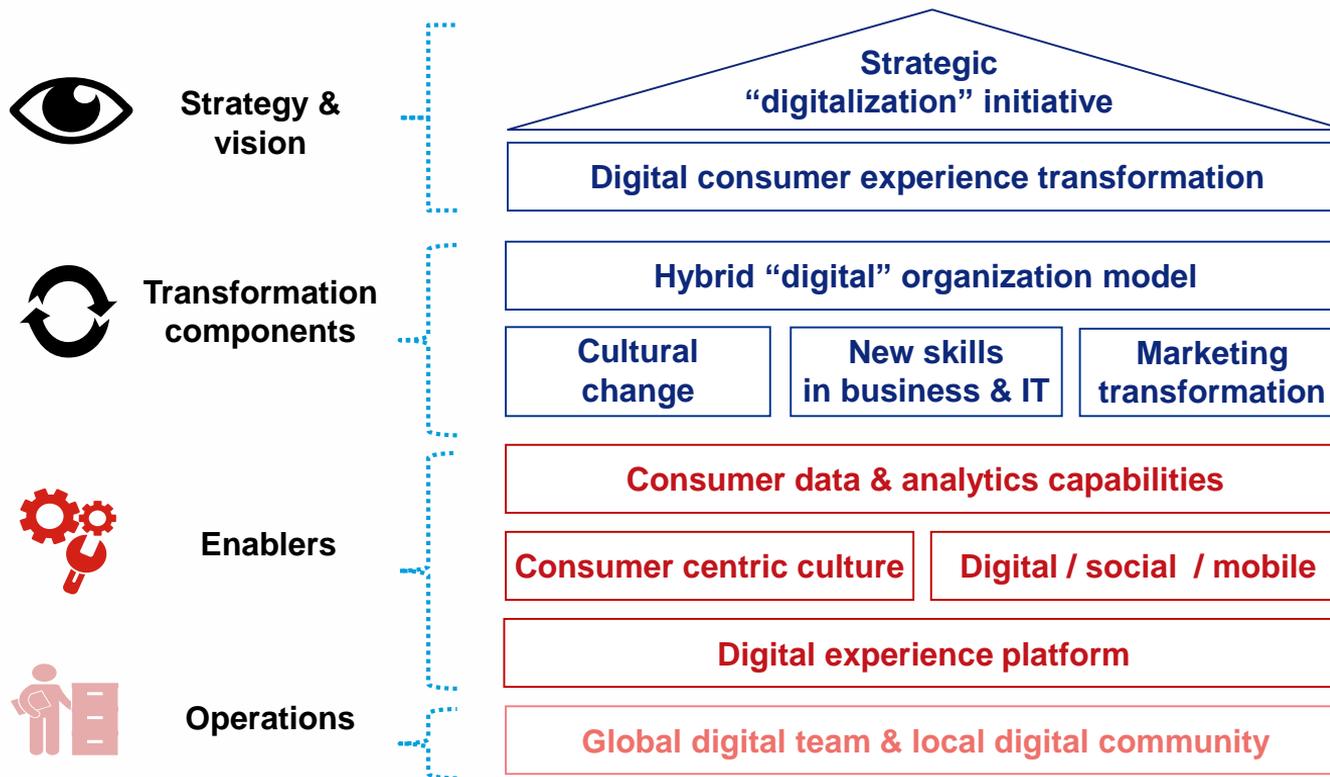
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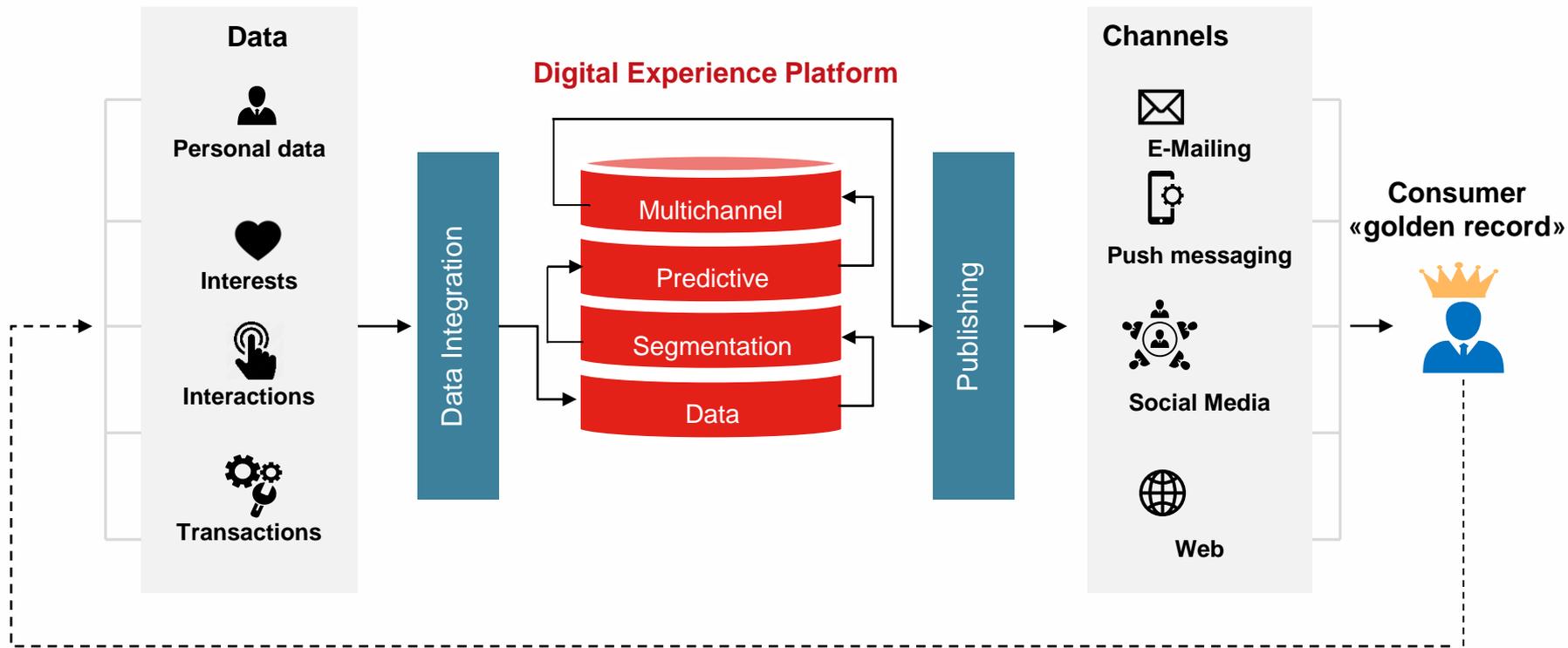
## In marketing, for sure!



## Current status & challenges



## The areas in which we want to improve



Source: [Emailvendorselection.com](http://Emailvendorselection.com)

# CONTACT PROFILE



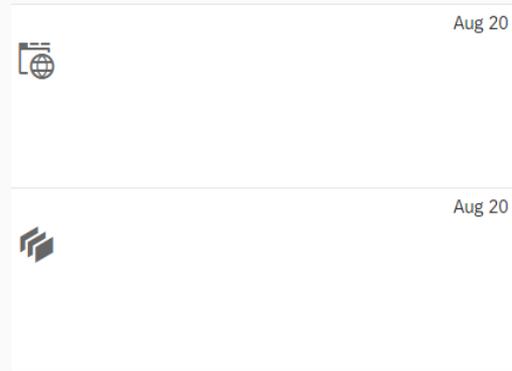
**Marcel Hürtlein**

6005 Luzern  
Switzerland

Reset Filters



## August 2018



## July 2018



Age: 41  
Gender: Male  
Marital Status: Unknown  
Latest Activity: Recent  
Sentiment Score: No Valuation  
Engagement Score: 90



Loyalty: 0	Sales: 0	Landingpage: 14	Lead: 0	Opportunity: 0	Activity: 0
Commerce: 0	Trade Fair: 0	Phone: 0	Event: 0	E-Mail: 33	Web: 18
Social Media: 0					



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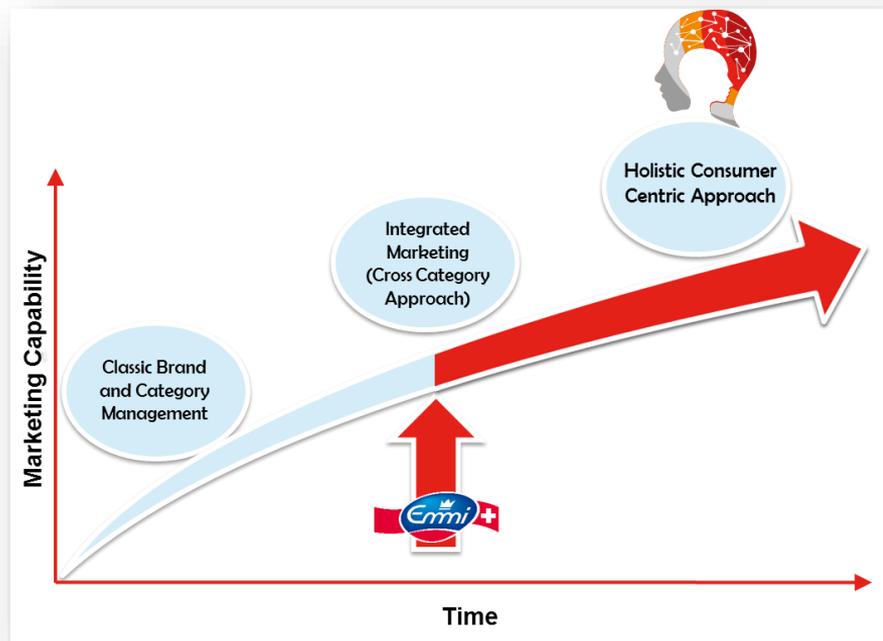
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## How we will evolve marketing @ Emmi



### Today

- Strategic Marketing is embraced
- Marketing capabilities are somewhat heterogeneous across the Emmi Group
- Some silo/category thinking
- Digital at industry par

### Tomorrow

- Consumer centric approach: From “Overall Food” to “Category” to “Concept”
- Digitally fully native
- Common Emmi Marketing Model which is reflected in an Organization Model



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## My key messages today

WHAT'S  
**New**  
WHAT'S  
**Next**

### Our context

- # The world is increasingly complex and digital and we are adapting to it

### Our strategy

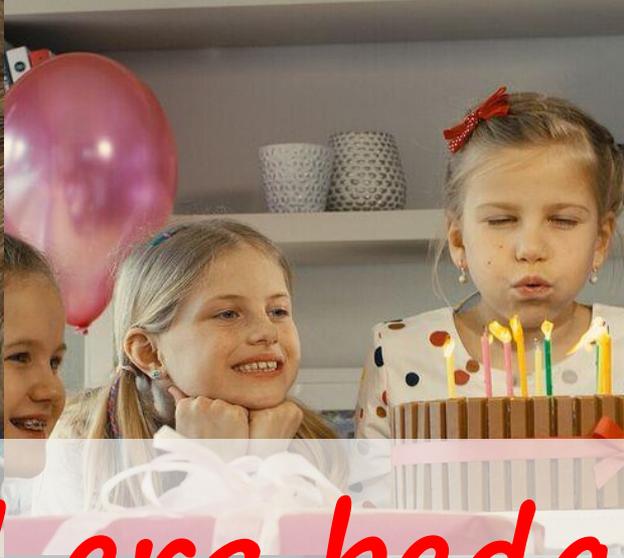
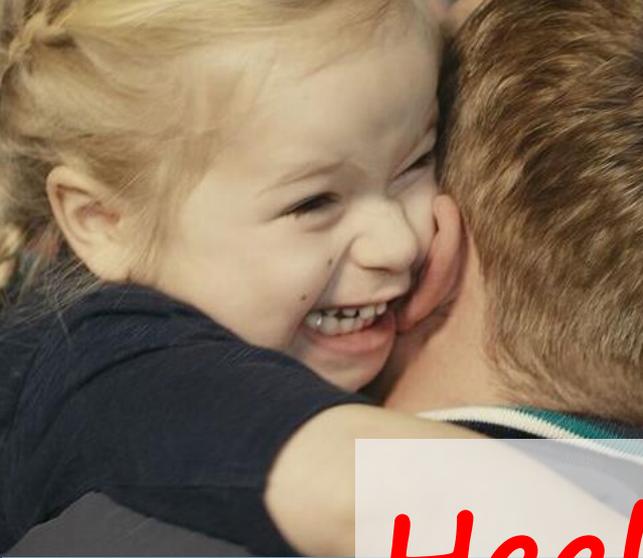
- # We focus on branded business and on our strongest (Global) positions and brands
- # We are evolving our marketing model and approach to match the challenges and are accelerating digital marketing with strategic intent

### Our global brands

- # The potential of RTD coffee remains significant and we are well positioned to reap that potential
- # With KB, we have a Global cheese jewel in our portfolio

### Our innovations

- # Innovation is strategic for Emmi and we have put in place the necessary approach and resources to continue being highly innovative



**THE BEST  
DAIRY MOMENTS  
— ARE EMMI —  
MOMENTS**

*Heel erg bedankt*

