



# Chill Chain Distribution

The Food Club

Wembley

Thursday 3<sup>rd</sup> April 2003



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SHOPS & CATERING SERVICE



# Graeme Bower

- Wholesale Controller
- Married 2 children - Live Battle in East Sussex
- Worked for Unigate/Dairy Crest since 1988 in various operational and Sales roles



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# Agenda

- The Company picture
- Size of Business & Serving Area
- Wholesale Department
- Service proposition & Market Trends
- Major Accounts and Brands
- Issues



# The Company



Following the acquisition of Unigate in July 2000, Dairy Crest is the largest dairy company in the UK with leadership positions in all sectors of the dairy market.



Dairy Crest is the UK's largest purchaser of milk



Cathedral City and Davidstow are two brands which make Dairy Crest the leading supplier of mature Cheddar in the UK



Clover is the brand leader in the dairy spreads sector



Frijj is the brand leader in the fresh flavoured milk drinks sector.



Dairy Crest has developed its presence in fresh dairy products through the Yoplait Dairy Crest joint venture



The No.1 British producer of dairy ingredients.



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# The Company Picture

- Chill Chain – Direct secondary delivery to shops and caterers
- Liquids – Direct central deliveries (mainly multiples)
- Foodservice – Direct central deliveries to RDCs via Nuneaton
- Separate business units for Cheese and Spreads give an added focus on key brands



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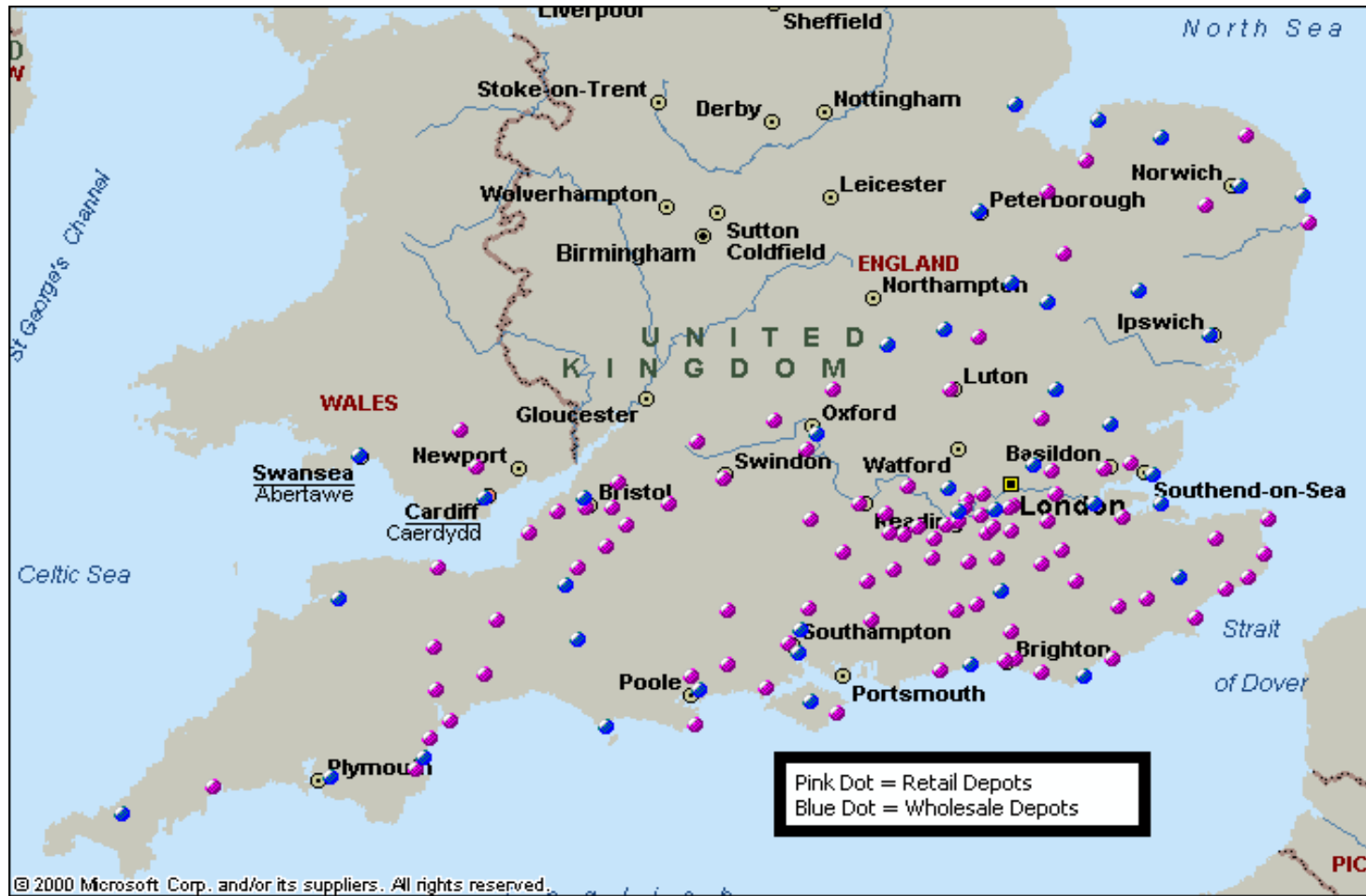


# Chill Chain Key Statistics

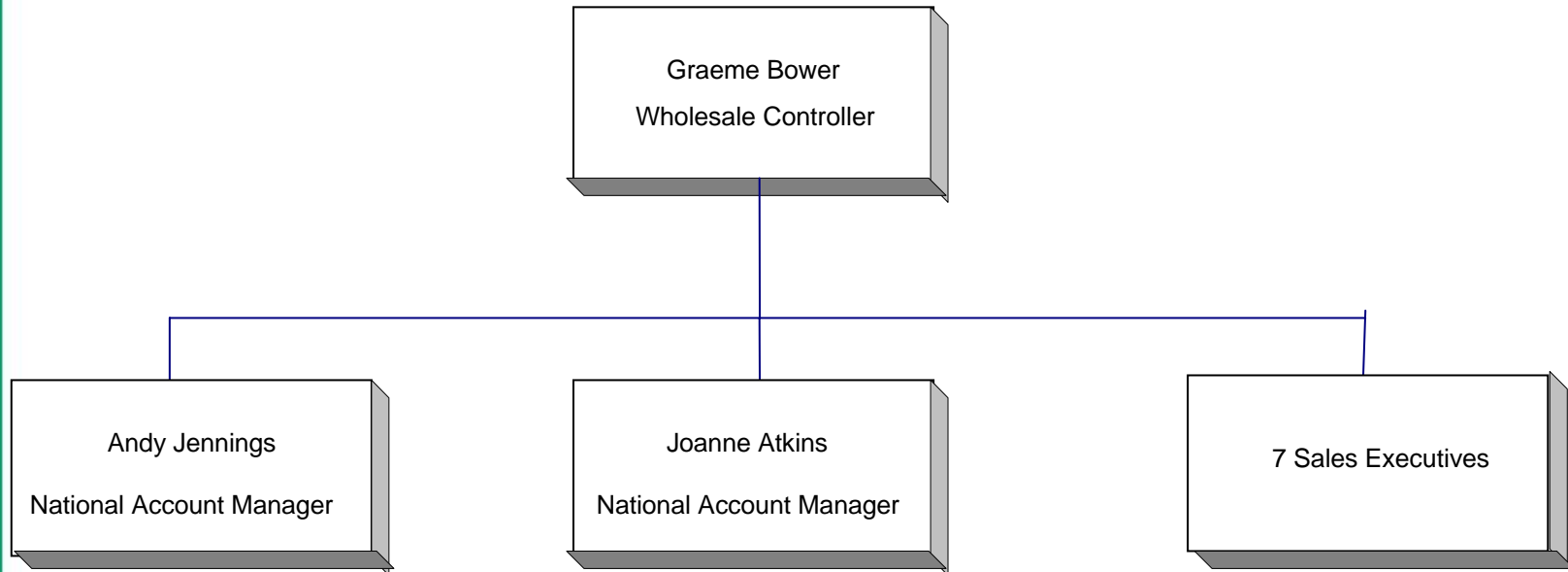
- 83m turnover
- 28m gallons milk pa
- 23m product sales pa
- 21,000 customers (shops & caterers)
- 273 refrigerated rounds
- Operated from 40 locations across the South
- Support network of account executives



# Geographical Serving Area



# The Team



- Martin Padgett - London East/Central London
- Lorna Conyard - East Anglia
- Dave Hayward - Hants/Dorset/I.O.W
- Ray Parrett - Kent/Sussex
- Bill Bridges - London West/Central
- Gareth Jones - Wales/Bristol/Oxford
- Martin Bartlett - Devon/Cornwall/Somerset

# The Service Proposition

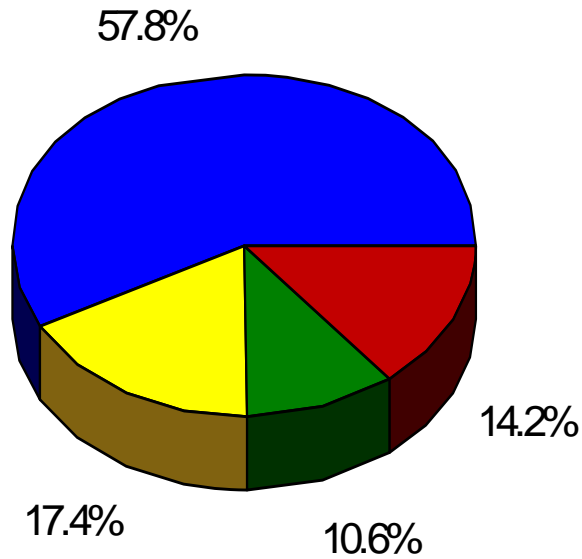
- Branded Fresh Milk in a variety of containers
- A wide range of branded chilled and ambient products
- Temperature controlled vehicles ensuring chill chain integrity
- The highest standards of production and distribution with some of the most advanced production sites in Europe - ISO 9002 accredited
- Six day per week distribution
- Handheld computers delivering added security and integrity
- Strategically located delivery depots throughout South of England
- Regional sales support executives to assist with ordering and delivery requirements
- Radiophone connected in 160 vehicles assisting the provision of excellent service



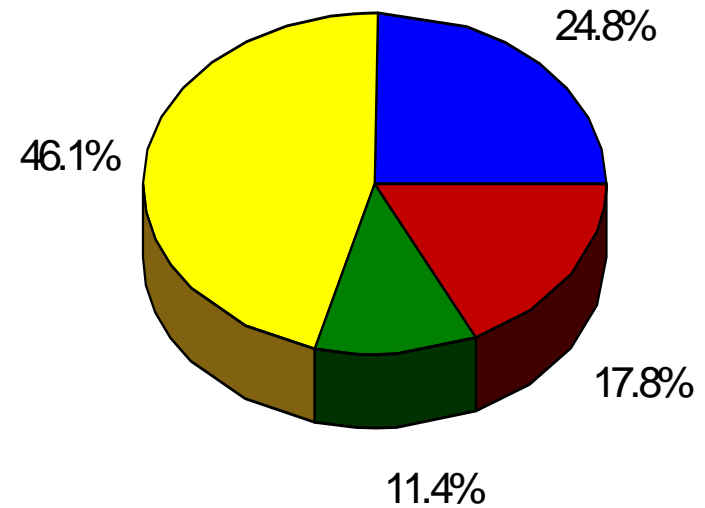
# MILK BY MARKET SECTOR

## Liquid Milk market trends

Total Milk - GB Litres (Million)



1990



1999

■ Doorstep ■ Multiples ■ Other Retail ■ Foodservice



# Dairy Crest Customers





# Milk



- Dairy Crest is dedicated to bringing you the best quality branded milk available
- Available in all pack formats for retail and catering sectors
- Tetra-top cartons, Polybottles, Pergal packs and milk portions
- Whole, Semi-Skimmed, Skimmed and Organic
- Packed at strategic ISO9002 dedicated processing sites



# Cheese



## ✓ The Brands



Cathedral City



Davidstow



St. Ivel



The Cheeses of Hartington



Fruit and Herb Co.



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# Yellow Fats

## ✓ The Brands



Clover



Utterly Butterly



Willow



St. Ivel



Country Life



Moonraker



Shirgar



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✓ Frijj



**FRIJJ**



**Uk's No.1 Fresh Flavoured Milk**



**Made from Fresh Milk**



**Advertised on TV**



**“How can something so tasty be so thick?”**



**Strawberry, Chocolate & Banana +Limited Edition flavour in 6x500ml, and 1x1L - This quarter “Custard Pie”**



**Frijj Extreme – the extra thick shake in 6x500ml**



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## ✓ Cream



- St. Ivel brand
- Single, Whipping, Double, Clotted, Seasonal, Soured
- All standard catering and retail pack sizes available
- Single, Whipping & Double Cream in 142ml, 12x284ml, 6x568ml and 1L
- Soured Cream 6x142ml cuplets
- Clotted Cream in 6x113g cuplets



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## ✓ The Brands



Petit Filous



Best There Is



Frubes



Wildlife



Weight Watchers



Yop



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# Issues

- The congestion charge
- Tachograph legislation



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