



Future Leaders Annual Congress 2004



Smart Shopping

What do customers really value?

PROGRAMME

24-26 October 2004

Marriott Hotel, Prague, Czech Republic

FLP Committee

Chairman:

Stephen QUINN

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Richard FLINT

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ALBERT HEIJN BV, The Netherlands

CIES - THE FOOD BUSINESS FORUM

CARREFOUR, France

DAYMON WORLDWIDE INC., Japan

DELVITA, Czech Republic

COCA-COLA HBC, Ireland

SPAR INTERNATIONAL, The Netherlands

What is the CIES Future Leaders Programme?

This programme represents a universe of young managers drawn from CIES member companies, who represent the future leaders of the food business. Participants come from areas spanning the whole business. The programme is designed to help them further develop their potential to become part of senior management and to enhance their personal contribution to the business.

The Congress includes strategic, operational and leadership modules, all of which are characterised by spirited debate. **Many companies use the CIES future leaders programme as a core development tool for their future generation of managers and as such the event is valued as an investment in the future of their company.**

What are the benefits of attending the Future Leaders Congress in Prague?

- **Store Visits** Discover first hand new and adapted store concepts in Prague
- **Store Analysis** Participate in structured store analysis and feedback sessions
- **Thought Leadership** Gain insights from thought-leaders both within and outside the food business
- **Debate** Participate in debates on both *Leadership* and *Smart Shopping*
- **Networking** Develop an international network of professional contacts that will *benefit both the delegate and the management of their company in the future*

Companies

Many CIES member companies include FLP participation as an integral part of the education of their future top management.

Examples include:

Ahold, Asda, Bahlsen, Carrefour, Coca-Cola, Danone, Delhaize, Dohle Handelsgruppe, Hormel, Kesko, KPMG, Marks & Spencer, Marsh, Metro, Mestdagh, Nestlé, Norgesgruppen, Pepsi, Pick'n Pay, Procter & Gamble, Sainsbury, Sobeys, Superquinn, Unilever-Bestfoods, Wal-Mart.



Delegates' Registration

08.00

Marriott Hotel, Prague

Morning

Stephen Quinn

Business Development Manager, Superquinn & Chairman of the FLP Committee

Ira Kalish

Global Director – Consumer Business, Deloitte Research, USA

Mark Price

Director of Selling & Marketing, Waitrose Ltd, UK

Jürgen Elfers

Financial Analyst and Head of European Retail Research, Commerzbank, Germany

Afternoon

Perry Seelert

Vice President, Product Strategy, Daymon Worldwide, Inc.

Guest Speaker

10.00

Session Moderator, Stephen Quinn

Welcome to the CIES Future Leaders Programme

10.10

SETTING THE SCENE

Smart Shopping. What do customers really value?

A definition of Smart Shopping and the implications of its growth.

Deloitte Research identifies, analyses, and explains the major issues driving today's business dynamics and shaping tomorrow's global marketplace.

11.00

The Waitrose brand strategy - a case study in adding value through quality

Differentiation through quality and expertise in the highly competitive UK market.

Waitrose is a privately owned UK supermarket chain and is part of the John Lewis Partnership. Waitrose operates 168 stores, primarily in the south of England. The John Lewis Partnership has a unique working structure. Each member of staff is a Partner in the company and profits are shared each year.

11.45

Smart Discounting - offering shoppers more than price

Are discounters more than price? A view behind the price tag of the discounter to explore the brand, category management and other strategies used to attract the smart shopper.

Commerzbank is a German private sector bank with total assets of approximately 390 billion euros. The bank's 32,500 employees serve approximately 6 million customers worldwide.

12.30

Lunch

14.00

Reinventing categories and "owning" them in consumers' minds

Developing an experience around a category as a strategy to secure the smart shopper.

Daymon Worldwide is an international company specialising in the sales and marketing of Private Brand consumer products.

14.40

The power of innovation

How innovative companies and products change the way we define value.

15.30

Refreshment Break

Jürgen Elfers

Financial Analyst and Head of European Retail Research, Commerzbank

Luciano Catoni & Petr Leidl

McKinsey & Co.

Guest Speaker

16.00

The Czech & Central European retail scene

A comprehensive examination of the Czech and Central European retail markets and a profile of the region's key players.

16.45

Store Visits logistics briefing

A presentation of Monday's store visits programme and briefing on the missions which are the basis for the delegates' analysis and feedback session.

McKinsey is a management consulting firm advising companies and institutions on issues of strategy, organisation, technology and operations.

17.15

The Czech story

Why history matters to the Czech consumer. The effect of change on the people of the Czech Republic as they have journeyed through communism, a "Velvet Revolution" and EU integration.

18.00

End of Session

Evening

19.30

Welcome dinner

Monday 25th
October 2004

Morning

OPERATIONAL SESSION

7.30

The FLP Store Visits Programme

Our store visits programme will include in-depth visits to the following leading operators:

• **Carrefour**

Carrefour is Europe's largest and the world's second-largest food retailer. The French company has over 10,000 outlets in around 30 countries. In the Czech Republic, Carrefour has a network of nine hypermarkets and is the fifth-largest hypermarket operator by sales, with estimated gross sales of EUR288 million in 2003.

• **Delvita**

Delvita is part of the Belgian-based Delhaize Group. Delhaize generates most of its sales in the US but also has operations in several countries in Europe and Asia. In the Czech Republic, Delvita operates 93 supermarkets and two convenience stores (Delvita City). It is the country's second-largest supermarket operator, with estimated gross sales of EUR339 million in 2003.

• **Globus**

German retailer Globus operates hypermarkets, DIY and electrical stores. In addition to its home market, Globus has operated in the Czech Republic since 1996. The family-run retailer has developed a network of 10 Globus hypermarkets and six DIY stores under the same name. Gross sales in the Czech Republic last year totalled EUR565 million, with 58% of sales generated through grocery items. Among hypermarket and supermarket operators, Globus ranks as the number three player behind Schwarz Group's Kaufland stores and Ahold's Hypernova.

• **Tesco**

UK-based Tesco is the world's sixth-largest grocer with over 2,500 food stores spread across the UK and Ireland, Central & Eastern Europe and Asia. In the Czech Republic, the retailer runs a network of 18 hypermarkets, one superstore and six department stores, all under the Tesco name. Tesco is the country's fifth largest grocer in the country, with sales of EUR643 million in 2003.

A light lunch will be provided during the store visits.

Complementary information on other stores of interest in the Prague area will be posted on the FLP Prague Congress website in advance of the event. Access via www.ciesnet.com



Afternoon

Luciano Catoni & Petr Leidl
McKinsey & Co.

Store visits feedback

14.30

Session Moderators

Store Visits Group Meeting

Participants will carry out structured store analysis based on a specific consumer profile and shopping tasks. They will review the results of their mission and lead their team to a conclusion.

16.00

Refreshment Break

16.30

Store Visits Feedback Session

Luciano Catoni & Petr Leidl will summarise the delegates' store analysis. This will be followed by a second task in which delegates will take on the role of either a commercial property developer or a retailer seeking a specific retail site. This will be a highly interactive and lively session.

18.00

End of Session

Evening

19.30

Delegate dinner

Tuesday 26th
October 2004

LEADERSHIP SESSION

CIES brings you this leadership session thanks to the sponsorship of *The Coca-Cola Company*

Morning

Building the future of the food business

What our times require from businesses and their leaders.

Benoît Cornu
Director of Corporate Communication,
Casino Group & Chairman
of The CIES Food Business in Society Task Force

09.00

The Leadership of the Sector

Communicating the value for the food business.

Did you know that your business opens markets for small enterprises, creates jobs and careers and helps keep the lid on inflation? So why does public opinion think the contrary? How to talk about leadership in a sector whose achievements are misrepresented.

Adam Morgan
Founder, eatbigfish

09.45

The Pirate Inside: building a challenger brand culture in our organisations and ourselves

Every organisation needs a little "Constructive Piracy": how to drive brave new thinking through large, relatively conservative companies. Adam Morgan is author of "Eating the Big Fish" and "The Pirate Inside". He left the advertising business to launch an international consultancy advising challenger companies on how to take on brand leaders.

René Carayol
Business guru, Broadcaster and Author

10.30

Refreshment Break

11.00

Managing a little less... Leading a little more

Many company strategies are about not wanting to lose. But the strategies of real leaders are about winning. Clear and easily implemented tips for moving from management to leadership. René Carayol spent 15 years in retailing. He is author of "Corporate Voodoo", and expert witness on the BBC television series "The Mind of a Millionaire". Today he advises some of the world's leading businesses.

Dr. Kjell Nordström
Institute of International Business,
Stockholm School of Economics

11.50

"Karaoke Capitalism" or institutionalised imitation

Why it is better to be a first rate version of yourself, rather than a second class copy of someone else. Dr. Kjell A. Nordström is co-author of "Funky Business" and "Karaoke Capitalism" and an advisor to and board member of several companies.

Stephen Quinn

12.40

Closing remarks by FLP Committee Chairman & Introduction of new Chairman

13.00

Close of FLP 2004 Annual Congress



Congress Sponsors

Coffee Breaks



Leadership Session



What is CIES - The Food Business Forum?

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

- Providing a **neutral platform for knowledge-exchange, thought-leadership and networking**. CIES services are channelled through international conferences, benchmarking studies, publications and tailor-made member services. Current activities include the Global CEO Forum, The World Food Business Summit, the Future Leaders Programme and the functional areas of Marketing, Information Technology and Supply Chain Management.
- **Orchestrating positions and developing tools on key strategic and practical issues affecting the food business**. These top-of-mind issues are identified by our ten retailer-led committees and taskforces. Priority projects include the Global Food Safety Initiative and the Food Business in Society Initiative.

CIES - The Food Business Forum has been growing with the food business for over 50 years. Its strength lies in the active commitment of its member companies and its privileged access to key industry players.

CIES retailer members alone generate over \$2,000 billion, employ 4.5 million people and operate close to 600,000 stores representing a total sales area of 160 million square metres.

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*To book, please see
registration &
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Any Questions?

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