



# **Bringing Innovation & Standardization to the Indian Restaurant Sector**

**(McCain Case Study)**

**27<sup>th</sup> August , 2012**



# Restaurant Landscape



## 1) Large & Growing

- 75000 Cr & Growing organised
- 22,500 Cr

## 2) Big Opportunity for all Segments

- QSR's : 7500 Cr
- Casual Dining : 5500 Cr
- Fine Dining : 3200 Cr
- Bakery : 2000 Cr
- Food Courts : 1700 Cr
- Cafes/ Kiosks/Parlours : 1450 Cr
- Pubs & Bar : 1000 Cr





## 2 Core Success Factors



- 1) **Meet Demanding Consumer Expectation**
- 2) **Hygiene & Efficient Supply Chain & Store Operations**





## Meet Demanding Consumer Expectation



- 1) **New Taste Experiences , Indulgence ( Can't get at home )**
- 2) **Hygiene , Good Quality Food and Environment**
- 3) **Speed of Service . Time from Order to Delivery**
- 4) **Ambience & Décor for Socialising**
- 5) **Hot Fresh Taste at delivery & consumption**
- 6) **Variety for the full Family / Group**





## Hygiene & Efficient Supply Chain & Store Operation



- 1) **Order to Serve time Compression : Better Asset Utilization**
- 2) **Consistency of output (Quality , Taste , Appearance)**
- 3) **Minimize Wastage , Storage , Spoilage , Non Value add labor**
- 4) **Quality & Reliability of Input Supplier**
- 5) **Predictability of pricing of Input Costs**





# Snacks are an indispensable option on the menu for operators.....



## Operator's perspective

## Customer's perspective

## Expressions

Menus have become synonymous with the establishment

Repeat demand from regular customers for the 'specialty items' on the menu

*"Every time they come, they ask for snack items such honey chilly potatoes, which they love at our restaurant"*

Part of an all day ala carte menu and also a puller for buffets

Fills in the gap till the main course arrives  
Convenient bite- quick, non- messy and hence, ideal for buffets

*"They ask for snacks first as they take less time, so that they have something to munch on"*

Emphasis laid on delivering customers' expectations through snacks

To customers (operators feel), snacks are an indicator of the overall quality of food served

*"See, these days, people don't have time for heavy meals. So, snacks make the most impression"*

Room for safe experimentation before inclusion in the main course. Eg new Mexican cuisine

Customers value variety on the menu and enjoy the option of choosing from an array of items/cuisines

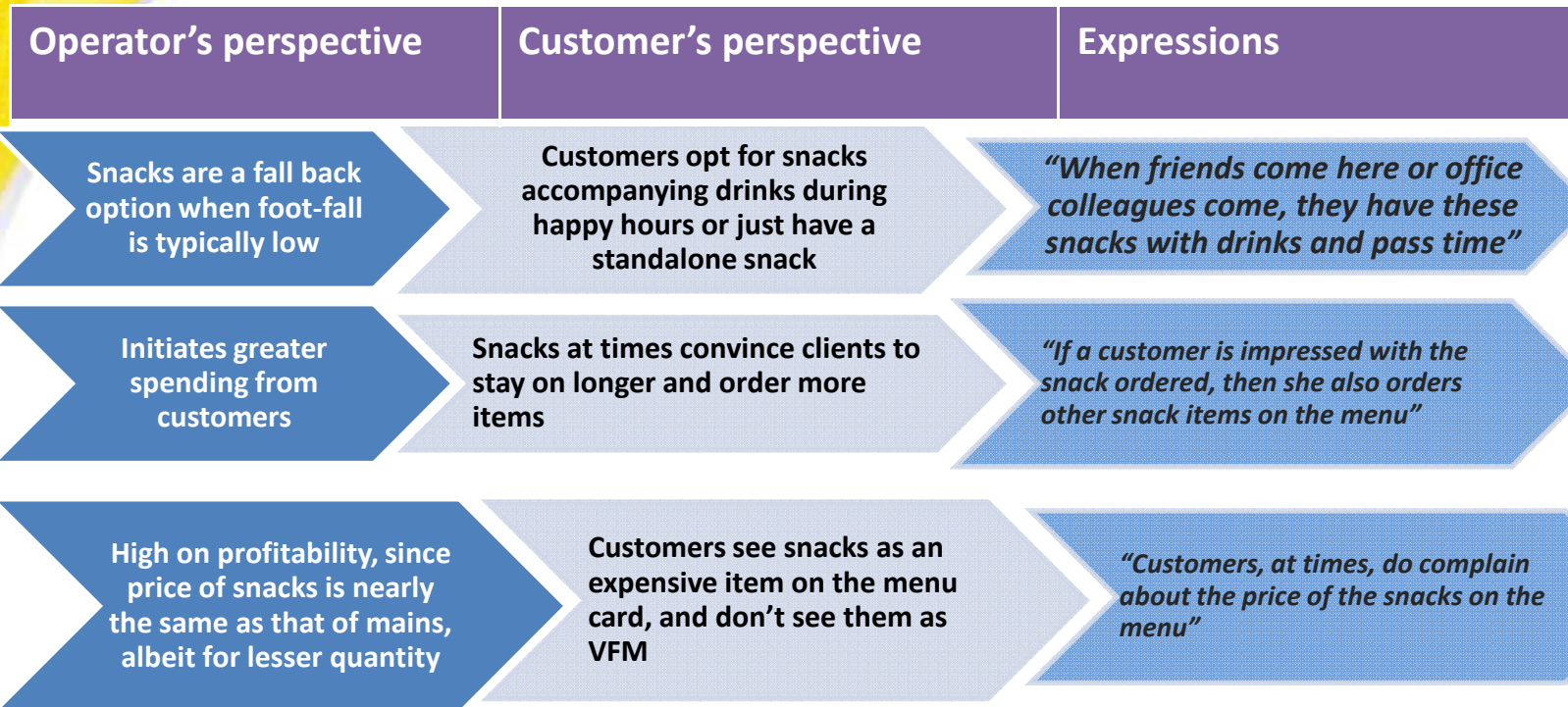
*"Customers have become modern now. They don't want the same pakodas and samosas. So, we introduce specialties"*





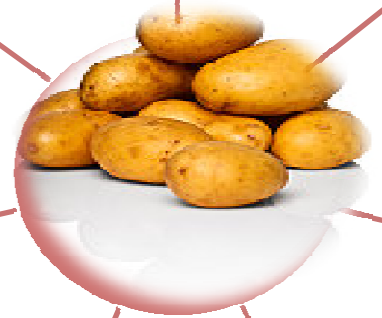


# ...they are also very lucrative for operators





# Potato seen as the 'heart of the kitchen', driven by its high profitability and versatility



Higher profit margins. Cheaper v/s other veg. (eg. Paneer, mushrooms)

Available all year

*"When our customers ask for French Fries, we can serve it in 10 minutes as it takes no time"- Rest Multi-cuisine*

Easy and quick to prepare

*"At conferences, clients ask for finger chips and french fries as they know that after these, they will not need require gravy dishes"- Hotel*

Seen as a quick filler

Liked by customers across age and social classes

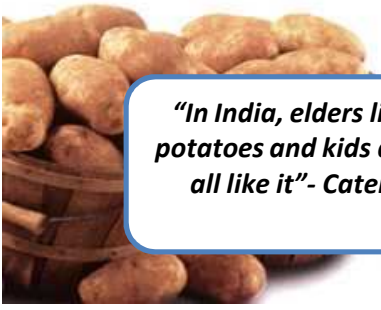
Adds volume to certain dishes as stuffing

Versatile- Standalone, accompaniment, and as an ingredient

*"Potato has so many uses..It can be added to the gravy to extend it for staff here or we mash and add it in parathas"- Restaurant, North Indian*

*"It is like the heart of our kitchen. We use it in so many ways"- Restaurant North Indian*

*"In India, elders like the taste of potatoes and kids also enjoy.. they all like it"- Caterers, Outdoor*







**Potatoes are key in both snacks and main course**



*French Fries are the most common frozen potato. Most other potato dishes are made from fresh.*

Snacks	Main Course
French Fries/ wedges	Sabzi Aloo
Potato cutlet/ tikki	Stews
Rolls	Aloo Dum
Seekh Kababs	Mashed Potato
<b>Tandoori Aloo</b>	Tari Aloo
Aloo tikki	Dosa
Chilli Potato	Gobhi aloo
Aloo chaat	Aloo peanut corn (mashed potato)
Hash Browns/ mashed potatoes	Aloo palak
Roast Potatoes	Aloo mutter
Rosemary/Oregano/Basil Potato	Aloo jhol
Pakoda/ bread pakoda	Aloo bharta
Samosa	Mixed vegetable korma
Rosti	Sambhar
Aloo achari/ aloo jeera	Chhole aloo
Prisley and pomps	Aloo lehsuni
Jacket potatoes	gravy thickener
Sabudana vada	
Ragda pattice	
Veg galauti kebab	
Hara bhara kebab	
Cheese balls	
Veg sandwich	
Roasted Aloo tikka	



## .. But Issues with Using Fresh Potatoes



- Key issues in using fresh potatoes:
  - Operation slow down due to long prep (peeling etc)
  - Lack of uniformity in quality, taste, appearance
  - More waste than frozen
  - Requires a lot of storage space – easy, but must be big, dry and pest free
  - Early prep for large quantities – can spoil
  - Must purchase frequently/daily
  - Labour Intensive





## Key benefits of frozen potatoes\* are speed of preparation and standardization of end product



- Key Benefits of Frozen potatoes:
  - Fast and easy to prepare – simply fry
  - Time saving
  - Consistency in size and appearance ensuring visual appeal of end product
  - Same quality year round
  - Easy to store- no concerns about dry area/pest free
  - No waste
  - Hygienic
  - Goes with many dishes or serve alone (fries)
  - Assured Availability year round at predictable price

Consistency seems to be a bigger concern in India than other countries





**Perceived cost and lack of information regarding supply/availability are current barriers to frozen**





## Frozen potato Snacking Solutions fulfill the various snacking expectation of the customers



Expectations	Importance as a snack	Potato based snacks
One bite, convenient... on the move	√ √ √	Cheese Balls, French Fries, Samosas, veg. cutlets
Crispy and Crunchy	√ √	Twisters, French Fries
Healthy	√ √	Potato salads, Tandoor Aloos, baked potatoes
Less Oily	√	Potato Salads, Tandoori Aloos
Trendy and experimental	√√	Smileys, Twisters, Hashbrowns, American/ Szechwan Potatoes, Mustard glazed potatoes
Versatile (stand alone and as an accompaniment with the mains)	√	Honey Potato/ Honey Chilli Potato, American/ Szechwan Potatoes, Mustard glazed potatoes, Potato based salad
Visually appealing	√√	Honey Chili Potato, Mustard glazed potatoes, veg. Burgers, Shahakari Shammi Kababs, Veg Seekh kababs, Cheese Balls





## Frozen Potato Snacking Solutions meet operator needs



Channel	Insights/Needs	Implications
Outdoor Caterers – large events (700+); live counters/stalls;	<ul style="list-style-type: none"><li>•Variety of potato items (including finger foods and mains) to be prepared easily in large quantity.</li><li>•Much labour required – scarce</li><li>•Low awareness frozen – perceived cost a barrier</li></ul>	<ul style="list-style-type: none"><li>•Labour/ time saving benefits for satisfying large volume requirements</li></ul>
Pubs/Bars – younger consumers; snacking	<ul style="list-style-type: none"><li>•Variety of snacking items to complement drinks that can be easily and quickly prepared</li></ul>	<ul style="list-style-type: none"><li>•Focus on snacks</li><li>•Speed, ease of prep, variety of consumer appealing snacks.</li></ul>
Office caterers – 50-100 people; Weekday lunch buffets, snacks for chai time	<ul style="list-style-type: none"><li>• variety, easy and quick to prepare, economical</li></ul>	<ul style="list-style-type: none"><li>•Prepared snacks entry point</li><li>•Highlight speed, ease of prep and value vs scratch.</li></ul>



## Frozen Potato Snacking Solutions meet operator needs



Channel	Insights/Needs	Implications
North Indian Restaurant – traditional dishes	<ul style="list-style-type: none"><li>•Exclusive fresh, but pressure on prep (Peeling,chopping) in peak times</li><li>•Potato as ingredient a key use</li></ul>	<ul style="list-style-type: none"><li>•Exclusive fresh users likely not a near in target – quantitative study to validate.</li><li>•Possible trial as “backup”</li></ul>
Multi Cuisine Restaurants	<ul style="list-style-type: none"><li>•Versatility of potatoes to go with many dishes a key benefit</li><li>•Low awareness of FS frozen potatoes beyond snacks</li><li>•Dual users: frozen for snacks, fresh for remainder.</li></ul>	<ul style="list-style-type: none"><li>•Leverage positive experience with frozen snacks to gain trial of alternatives such as ingredient or prepared mash.</li></ul>





## McCain Pioneer of driving Frozen Penetration Globally & in India



1. Global Frozen Food Company
2. Head quarter in Canada with sales of over \$6bn
3. 50 processing plants across 6 continents with sales in over 150 countries
4. Specializes in frozen food ranging from prepared meals to appetizers for example, French fries, potato specialties, appetizers, pizzas, vegetables, ready meals, desserts
5. In India since 1998
6. India focus is on Snacks





## Serving India for last 12 years



1998 : First sale of McCain French fries to Wimpy's

1998 : Agriculture Development Programme (Seed development and Field trials)

2001 : Initiated purchase of contract farmed potatoes

2004 : Agriculture programme achieves commercial success

2005 : McCain Board approves investment to build plant in India

2007 : State of the art potato processing plant in Mehsana district of Gujarat commissioned

2008 : Launched the first Indian innovation Aloo Tikki

2011 : Expands Plant capacity

2011 : McCain commenced Brand Advertising

2012 : Launch of McCain Idli Sambar Combo





# McCain Impact



Large number of Customers . Approx 10,000 buying but still low across all segments .

## List of Segments :

Segment	% outlet (2012)
Hotels	19
Caterers	7
Cinema	3
Bakery	7
Vending	3
Restaurants	52
Miscl..	9
Total	100



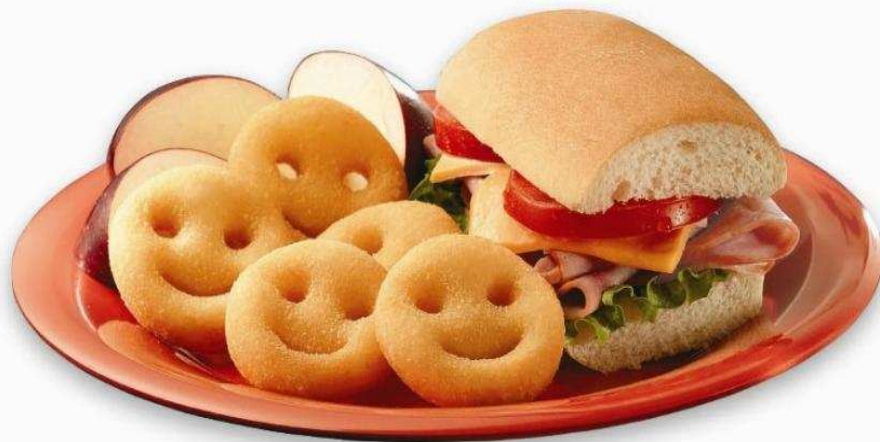




# How are these Customers benefitting



- Range of International Frozen Snacks: McCain Smiles, French fries, Seasoned Wedges, Hashbrowns, Cheese appetizers





# How are these Customers benefitting



- Range of Indian Snacks through localized R&D efforts. McCain Aloo Tikki, Veggie Burger Patty, Chilli Garlic Potato Bites, Veg Nuggets , Idli Sambhar







**Range of “Signature” dishes  
that Chefs can create**





McCain 3-minute Idlis are super convenient to prepare.  
 Just microwave for 3 min and soft & fresh idlis are ready to serve.

**Multiple COOKING options**



**Multiple SERVING options**



*Idli with Sambar*



*Idli with Coconut Chutney*



*In a cup (vending)*



**Masala Idli Recipe**

- BENEFITS:**
- Just heat & serve in 3 minutes (in microwave)
  - Consistent shape and piece weight
  - All natural. No preservatives
  - Zero waste, perfect cost control

- Cut 6 pcs of Idlis into quarters, deep fry and keep aside.
- Heat 2 tsp of oil in a kadhai & fry 1 tsp of chopped garlic, ¼ cup of chopped onions until golden.
- Add 1 cup of chopped tomatoes, ½ tsp chilli powder, ¼ tsp turmeric powder, ½ tsp garam masala and continue sauting.
- Now add fried Idlis, ½ cup chopped coriander, salt to taste and mix well. Serve hot.



**Case Pack: 12 bags x 1kg = 12 kg, Piece wt: 35g, Pieces/kg: 28**

McCain Foods India Pvt Ltd, C-5, SDA Commercial Complex, New Delhi - 110 016, India  
 Tel: 91-11-2652 7181, 91-11-4669 9000, Fax: 91-11-2652 7196, Website: www.mccainindia.com  
 Email: customerserviceindia@mccain.com or call on Toll Free No. 1800117181







### Super Vege Burger

Premium breaded burger patty made from mashed potatoes, diced vegetables like peas, carrots and seasoned with spices and herbs. Excellent hold time.

Frozen Patty Wt. - 80g      Diameter - 95mm      Suitable Bun size - 4"

### Popular Vege Burger

Frozen Patty Wt. - 60g      Diameter - 85mm      Suitable Bun size - 3.5"



### Herb Chilli Potato Patty

Crunchy burger patty made from shredded potatoes, chilli flakes, spices and herbs. Economy burger option.

Frozen Patty Wt. - 55g      Diameter - 80mm      Suitable Bun size - 3.5"

### Benefits from McCain Vege Burgers

- Choice of '3' for Premium, Regular and Economy Burgers
- Zero Wastage ← → Perfect Cost Control
- Create Signature Burgers by adding your choice of Sauces and Toppings
- Consistent Quality Burgers Anytime!



### Tips for making the perfect burger:

- Keep all the ingredients ready in advance.
  - Fry, Bake or Grill the Vege Burger Patty
- Toast the buns to **caramelize sugar** (this prevents the buns from becoming soggy on application of mayo)
  - Begin burger build up with the crown upside down
- Dress the crown with **mayo** and add **onion & tomato slices** for extra crunch
  - Place the hot patty and cover with the heel
- Wrap in wax paper & bring the burger to an upright position
  - Serve hot with **McCain French fries** or **Savoury Wedges**
  - To create a **Cheese Variant** just add a slice of cheese

Product Details	Case Pack	Net Wt.	Pieces/Bag
Super Vege Burger	12 bags X 1.2kg	14.4kg	15
Popular Vege Burger	12 bags X 1.2kg	14.4kg	20
Herb Chilli Potato Patty	8 bags X 1.5kg	12kg	27

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McCain brings you the perfect party snack. An irresistible combination of potatoes, capsicum, onion, carrots & bold Tandoori seasoning, finely coated in crispy golden bread crumbs. Add a hint of festivity to all occasions or spice up your appetizer menu with McCain Tandoori Vege Nuggets.

### MULTIPLE SERVING OPTIONS



Sell by number of sticks



Combos



Banquets, Parties, Cocktails



Sell by portion



Meal Combo or Meal Buffets

Suitable for Take-Away and Home Delivery

### BENEFITS

- Unique taste and flavour
- Ready-in-minutes Fry or Bake
- Cook → Hold → Reheat → Serve
- Excellent hold time - upto 30 min under heat lamps
- Perfect portion control
- Zero waste, perfect cost control



Case Pack : 1kg X 12 = 12kg, Pieces/Kg : 72

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# MULTIPLE SERVING OPTIONS



**Parties, Cocktails**



**Banquet**



**Sell by portion**

## BENEFITS

- Extra Crunchy & Unique taste
- High Piece Count
- Just Fry or Bake
- Zero waste, perfect portion control



**Case Pack : 8bags x 1.5kg = 12kg; Pieces/kg: 130**

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## Multiple Cooking Options



## Multiple Menu Options



*Aloo Tikki Chaat*



*As snack with chutney or sauce*



*Bun Tikki*



*Ragda Patty  
(Tikki with Chole)*



*Aloo Tikki Roll*



*Suitable with  
Traditional Indian Thali  
& Meal Buffets*



*Aloo Tikki Sandwich*

**Case Pack : 8 x 1.5 kg = 12 kg Pieces/kg : 24**

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McCain International Inc., Middle East Regional Office, Jebel Ali Free Zone, LOB. 16, 4th Floor, Office # 16412, Jebel Ali, Dubai, UAE, Tel: 971-4-8815309, Fax: 971-4-8816473







**McCain**  
**Creative Menu Solutions**  
**to Drive Business**



**HONEY CHILLI POTATOES**  
 with McCain French Fries



Prep Time: 10 min Serves: 2

Ingredients: 1/2 pack McCain French Fries,  
 1/2 tsp each Red Chilli Sauce, Vinegar, Soya Sauce  
 & Honey, 1 tsp Corn Flour mixed in 1tbsp water,  
 1/4 tsp Salt & Pepper, Oil for frying

Cooking Direction: Deep fry French Fries for 3 min or  
 until golden yellow and keep aside. In a pan, combine  
 all ingredients for the sauce and cook until it thickens.  
 Remove sauce from heat. Toss together French Fries & sauce in  
 the pan until combined. Serve immediately.



**MUMBAI CHAAT**

with McCain Chilli Garlic Potato Bites



Prep Time: 10 min Serves: 2

Ingredients: 1/3 pack McCain Chilli Garlic Potato Bites,  
 2 tsp Tomato Ketchup, 1 tsp Tamarind Sauce,  
 1 each Fresh Red Chilli, Onion, Tomato chopped,  
 Few leaves of Coriander, 1/4 tsp each Salt, White Pepper,  
 Chilli Powder, 1 tsp lemon juice, Oil for frying

Cooking Method: Deep fry McCain Potato Bites for  
 3 min or until golden brown and keep aside. In a  
 separate bowl mix together all other ingredients except lemon juice. Toss in McCain Potato Bites  
 into the sauce and mix. Squeeze lemon juice on top. Serve Immediately.







### McCain SMILES SUB

Prep Time: 10 min Serves: 2

**Ingredients:**

For Tomato Sauce: ½ cup Tomato Puree,  
4tbsp Tomato Ketchup, 1 tsp crushed garlic,  
¼ tsp Red Chilli Powder, Salt & Pepper to taste

For Sandwich: 7-8 McCain Smiles, 1 Garlic Bread  
Loaf, Butter, 100gm Mozzarella Cheese, 1 Onion,  
Capsicum, Tomato cut in to rings, Oil for frying

**Cooking Method:** Deep fry McCain Smiles for 3 min or until golden yellow and keep aside. Slice the loaf lengthwise into two and spread butter evenly onto each slice. Next spread some tomato sauce followed by onion, capsicum and tomato rings. Next arrange smiles onto the vegetables. Top with grated cheese and oregano. Grill in an OTG for few minutes or until cheese melts. Serve hot.



### McCain SMILES CANOPY

Prep Time: 10 min Serves: 2

**Ingredients:** 8 pcs. McCain Smiles, 1 Tomato chopped,  
Chilli Mayo Dip, Few lettuce leaves, Oil for frying

**Cooking Method:** Deep fry McCain Smiles for 3 min or until golden yellow and keep aside. Create a sandwich using two McCain Smiles in between which we add a piece of lettuce leaf, some tomato slices and top with a dollop of chilli mayo dip. Arrange on a platter and serve immediately.







# Frozen Food



Freezing offers quick and convenient access to premium quality, healthy, nutritious meals and ingredients and is perfect for any busy kitchen

No need to add preservatives which are often found in chilled, ambient or 'fresh' foods so frozen is often closer to our perception of 'natural' food





## What makes Frozen Foods Unique



Freezing is the most natural method of food preservation without the use of any preservatives

- ✓ Foods stored at -18 degrees prevents microbial growth
- ✓ Advanced 'Quick Freeze' technology locks freshness and nutrition
- ✓ Convenience of storage, ease of preparation and multiple reconstitution options





## McCain Expertise



Frozen Foods is a specialized area that  
needs expertise

Four key areas of McCain expertise

1. Potato Agronomy : growing process quality potatoes, contract farming, potato storage
2. Manufacturing : capital intensive with state of art technology
3. Research & Development
4. Cold Storage & Supply chain





# Agronomy



Partnering with Gujarat Farmers for world-class produce







# Agronomy Programme in Gujarat



- ✓ Seed Programme
- ✓ Irrigation Systems
- ✓ New Planting Technique
- ✓ Fertilizer & Pesticide Application
- ✓ Potato Storage





## What have we achieved



Working with over 1200 farmers in Gujarat

Introduced potatoes in non-traditional belts

Cultivating potatoes in over 3500 acres of land





# World's Highest Seed Multiplication Program



**Lahaul valley –  
Himalayan Range  
(Northern India)**

**Alt.: 13,000 ft**



**Shepody Seed Crop**





## What have we achieved



**Seeds disease resistant**

**Seeds result in higher tuber size**

**Higher yields**







# Manufacturing Facility



**Success of agronomy program saw McCain investing in a modern potato processing plant with an investment of Rs. 140crore**

**Capacity to process 40,000 tonnes of potatoes per year**



**McCain India has been ranked amongst top 20 exporters (processed vegetables) by APEDA for the period 2010-2011**



## Food Safety Nutrition & Hygiene



- World class technology and processes to maintain quality and integrity
- Fully automated manufacturing facility and high speed equipment that immediately packs products in a food safe environment
- HACCP and ISO 14001 certified
- All ingredients and products are tested in certified laboratories
- Ingredient and Nutritional information declared on packaging as per FSSAI guidelines







Vision Moving Forward



World over Frozen Penetration “HIGH”= 50% +  
but India Penetration is Low  $\sim$  5%

**Big Potential for Growth**





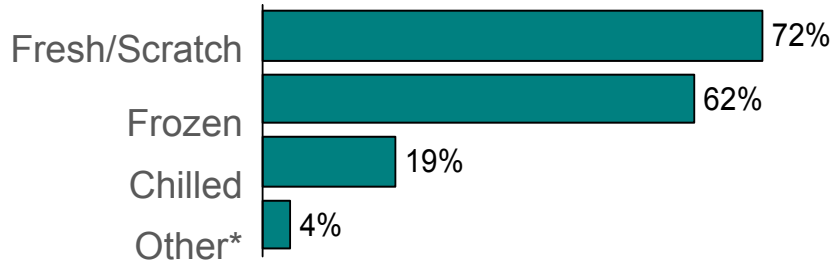










Conversion from fresh remains the #1 opportunity globally. Potato side dishes are most often made from fresh potatoes.



### All Forms Of Potatoes Used

**Question:** Thinking about the potato side dishes you offer, in which of the following forms are they prepared? You may select as many as apply.



	Canada  %	US  %	UK  %	SA  %	Italy  %	Brazil  %	Australia  %	Mexico  %
Fresh/Scratch	73	66	87	64	86	54	84	63
Frozen	66	70	47	50	85	56	64	58
Chilled	29	27	25	9	16	16	13	17
Other*	8	7	1	1	NA	3	4	5



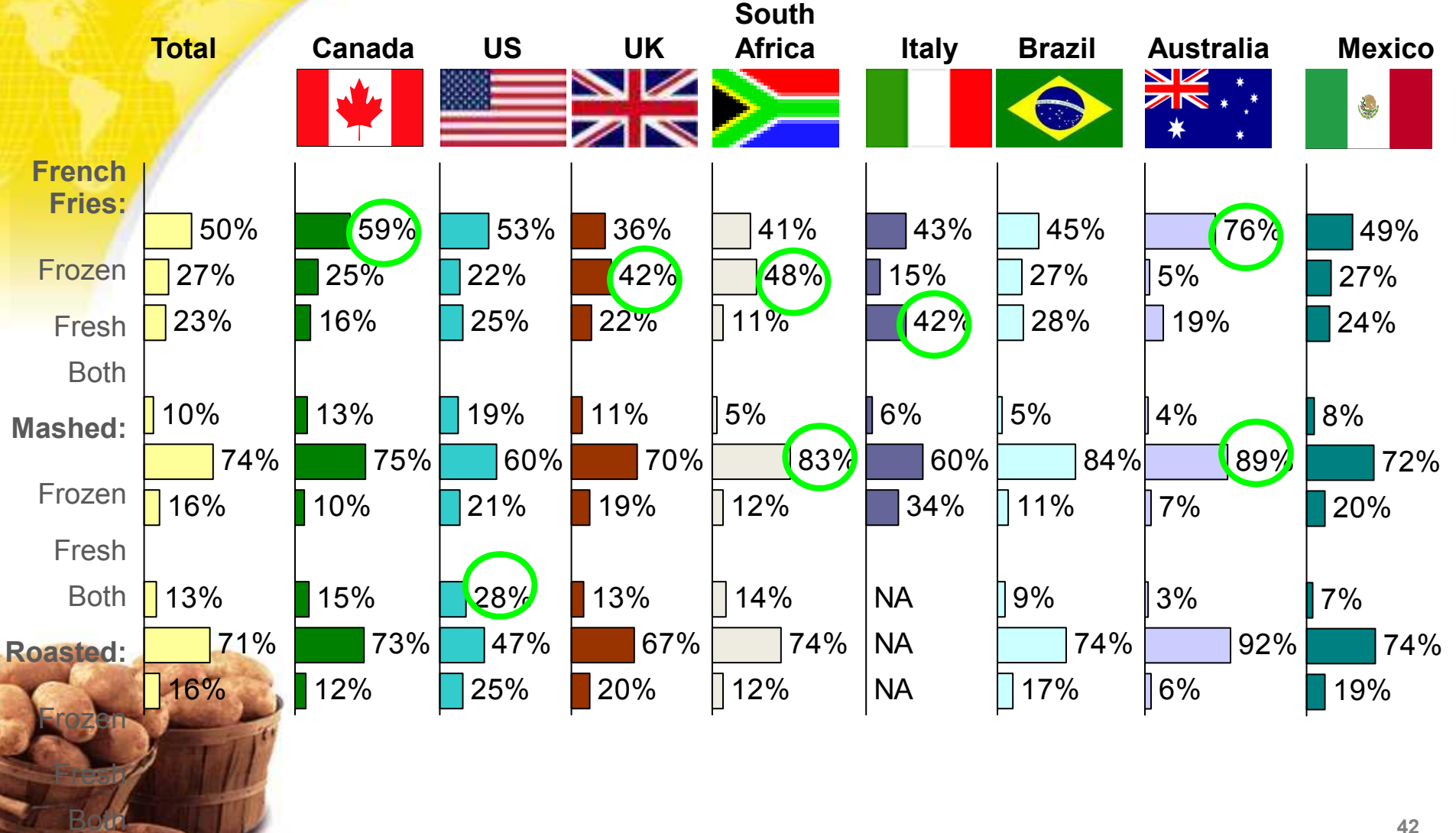
\* Not asked in Italy.



Frozen Fries are important across the world .  
Conversion from fresh is a massive opportunity  
for mashed and roasted potatoes.



### Formats Used Among Type





**French Fries are the most popular potato item globally on menus.**



**Ways Potatoes Served In Restaurant**

	TOTAL	Canada	US	UK	South Africa	Italy	Brazil	Australia	Mexico
French Fries	89	85	91	87	97	92	88	86	85
Mashed	60	73	63	68	39	45	60	72	55
Baked	50	55	63	62	31	80	9	58	41
Roasted	42	52	51	62	35	NA	39	67	30
Wedges	37	36	38	38	30	46	25	66	24
Hash Browns	20	48	29	23	10	NA	NA	37	13
Formed Potatoes	14	9	15	8	4	53	8	NA	8
Palha	NA	NA	NA	NA	NA	NA	35	NA	NA
Potato Salad	NA	NA	NA	NA	NA	NA	16	NA	NA
Saute's	NA	NA	NA	NA	6	NA	NA	NA	NA
Rosti	NA	NA	NA	NA	6	NA	NA	NA	NA
Potato Cakes	NA	NA	NA	NA	3	NA	NA	NA	NA
Other	7	13	*	8	1	1	NA	28	7
Average	<b>3.3</b>	<b>3.7</b>	<b>3.5</b>	<b>3.6</b>	<b>2.6</b>	<b>3.2</b>	<b>2.8</b>	<b>4.1</b>	<b>2.6</b>















**McCain enjoys a very positive profile overall**



**In almost every country, significant advantages are evident versus competitors. In Mexico, low awareness of the McCain brand results in lower scores compared to other regions. Australia has the strongest regional competitive situation.**









	Total	Total Agree							
		Canada 	US 	UK 	SA 	Italy 	Brazil 	Australia 	Mexico 
	%	%	%	%	%	%	%	%	%
Is A Company I Trust									
McCain	58	67	63	54	81	85	55	63	38
Competitor 1	NA	23	47	34	36	8	29	62	19
Competitor 2	NA	43	42	40	10	15	26	41	22
Has New & Innovative Products									
McCain	51	55	64	50	77	80	47	46	34
Competitor 1	NA	19	49	35	36	8	28	47	18
Competitor 2	NA	29	41	37	14	11	23	31	21
Has Quality Products									
McCain	60	69	69	57	79	85	60	64	45
Competitor 1	NA	26	56	35	37	9	31	64	23
Competitor 2	NA	44	47	42	14	15	25	40	24





**Overall, McCain demonstrates strength across all important equity measures.**



	Total %	Total Agree							
		Canada  %	US  %	UK  %	SA  %	Italy  %	Brazil  %	Australia  %	Mexico  %
<b>Products Are Consistent From Case to Case</b>									
McCain	56	65	63	50	76	83	57	63	34
Competitor 1	NA	25	49	34	36	10	30	64	25
Competitor 2	NA	41	41	37	14	15	25	39	22
<b>Products Offer The Best Total Value For What You Pay</b>									
McCain	52	58	64	49	75	72	54	46	38
Competitor 1	NA	21	49	30	36	6	28	49	20
Competitor 2	NA	34	41	34	14	13	24	32	23
<b>Provides Excellent Customer Service</b>									
McCain	45	53	58	38	74	69	42	33	35
Competitor 1	NA	18	48	27	35	6	28	38	20
Competitor 2	NA	30	38	30	15	8	24	25	23





# Cooking equipment is similar around



## Equipment Used

	TOTAL	Canada	US	UK	South Africa	Italy	Brazil	Australia	Mexico
Freezer	79	97	92	86	93	N/A	91	97	81
Grill/Cook-top	76	84	85	60	87	91	40	91	75
Microwave	75	91	79	69	89	44	70	94	71
Conventional Oven	70	77	71	85	47	68	69	84	59
Stove Top	64	82	45	66	69	N/A	84	90	79
Open Top Oil Fryer	62	79	68	70	78	N/A	56	86	66
Broiler	55	52	59	76	18	82	20	63	70
Steamer	51	48	76	64	27	37	44	55	52
Convection Oven	38	59	37	33	25	25	18	67	35
Other Ovens	30	33	35	35	16	18	42	40	20







## Vision Moving Forward



# Be the preferred destination for Snacking Solutions

Ambition to Double Frozen Penetration Every Year

### Three Growth Drivers :

- 1) Operator Awareness and Trial ! Overcome barriers on lack of information regarding cost , supply & availability.
- 2) Widen product portfolio
- 3) Supply Chain Design that reaches out to the full Sector





Thank You