



PLYMOUTH COMPETITIVE AUDIT

04.19.16

states of matter

PROJECT GOALS:

- Give Plymouth a new look that employees can be proud of
- Position Plymouth as the go-to meat company on the West Coast
- Rally the organization around future goals

TODAY'S GOALS:

- Review and understand the competitive landscape
- Discuss the interview findings
- Identify areas of strength, weakness, opportunity and threat

PURPOSE:

Understand the competitive landscape and pinpoint what we own

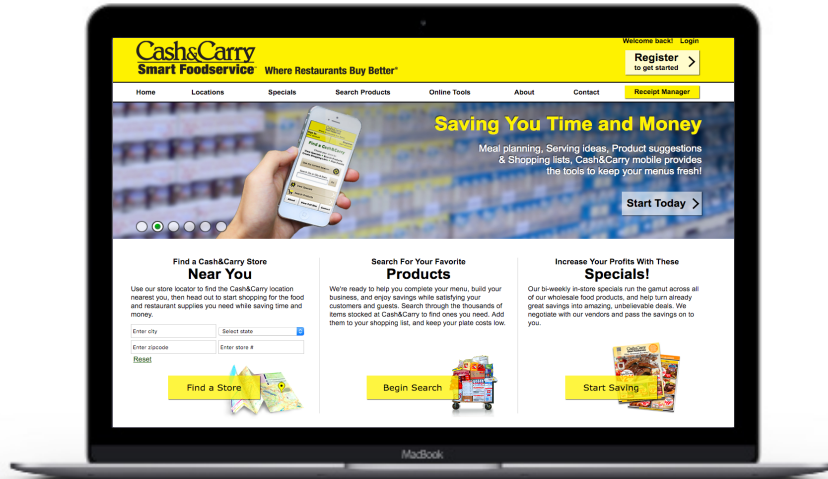
WHAT WE LOOKED AT:

- Brand Positioning
- Key Messages
- Tone & Personality
- Points of Interest or Distinction

IMPLICATIONS:

- **Positioning:** Identify uncharted territory and ruts we can avoid
- **Messaging:** Identify and evaluate industry conventions we should be aware of
- **Brand Identity:** Opportunities to stand apart but still meet expectations

PLYMOUTH
COMPETITIVE AUDIT
 HOMEPAGES



Cash & Carry



Pacific Foods

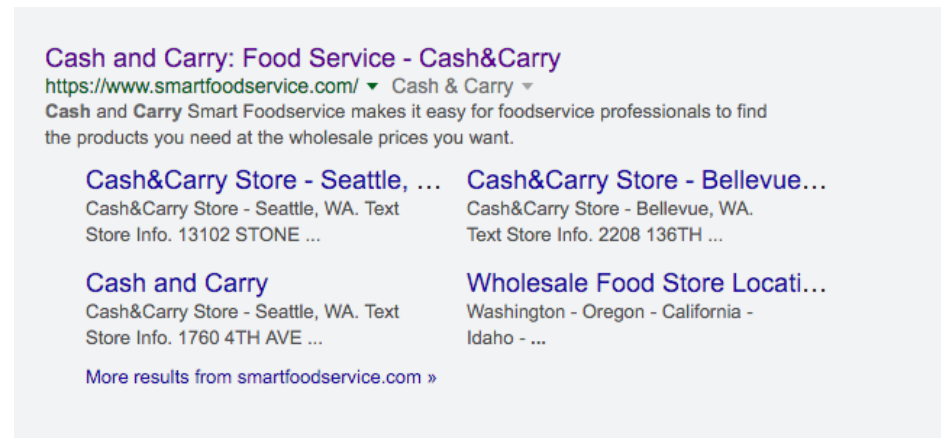
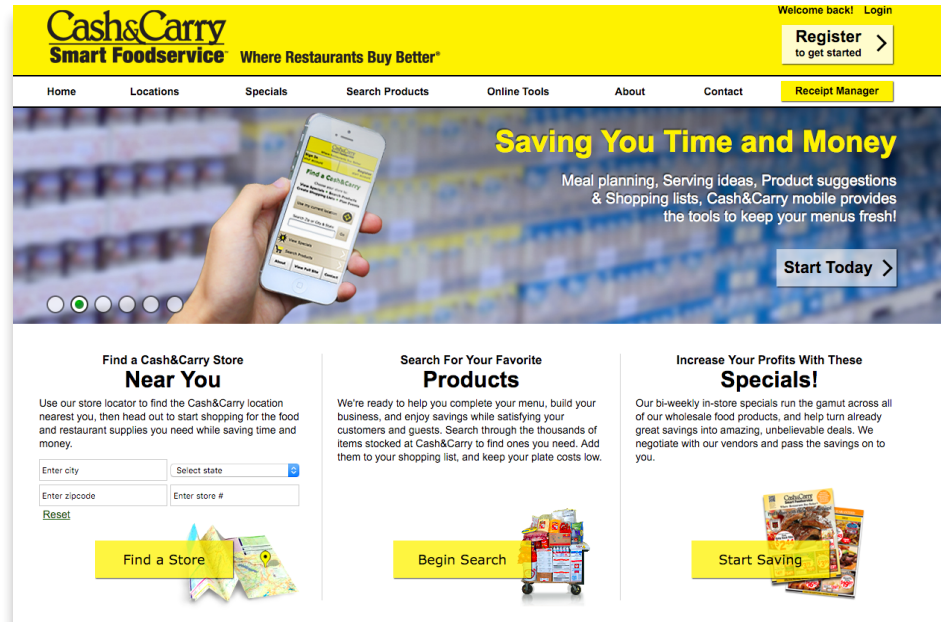


Restaurant Depot



Western Boxed

PLYMOUTH
COMPETITIVE AUDIT
CASH & CARRY



POSITIONING: The cheapest do-it-yourself option for restaurants

KEY IMPRESSIONS

- The use of bright yellow is distinct and memorable
- They are the low-cost option
- The brand has a do-it-yourself vibe

VALUE PROPOSITIONS

- Where restaurants buy better
- Provide the right products at the right prices, 7-days a week
- Built on convenience, low prices and ease of shopping

MEMORABLE MOMENTS

- Online Shopping Lists: our shopping list remembers which items you add, so you can build your list over time, then print out when you're ready to come in and purchase
- Online Newsletter: Bi-weekly specials, industry news, consumer insights, and new marketing concepts
- 55 locations across California, Idaho, Nevada, Oregon and Washington displayed prominently

PLYMOUTH
COMPETITIVE AUDIT
 CASH & CARRY

**Built on Convenience, Low Prices and Ease of Shopping
 About Us**

BUILT ON CONVENIENCE, LOW PRICES AND EASE OF SHOPPING

Headquartered in the Greater Portland, Oregon area, Cash&Carry Smart Foodservice has been operating throughout the Northwest for more than 60 years. As a wholesale food distributor and food service warehouse, we help you shop for a wide range of quality food products, chef supplies, wholesale restaurant supplies, and catering supplies in a way that saves you time and money. Our goal is to help you grow your business and satisfy your diners, customers and guests.

OUR MISSION: Provide the Right Products at the Right Prices 7-Days a Week.

Over the years, our focus has been on helping small, independent operators keep their costs low without sacrificing the quality of their food products. We choose the products we carry carefully in order to ensure quality and consistency throughout our stores. In so doing, we maintain low prices, and offer weekly, bi-weekly and monthly specials that help busy restaurant owners, chefs, caterers, deli owners, coffee shop proprietors and event planners control their costs and budgets.

We have more than 10,000 products available at each of our 55 wholesale locations. With stores in Washington, Oregon, California, Idaho and Nevada, Cash&Carry is ready to help you shop, stock up, and save big.

Visit the Cash&Carry nearest you, and start saving with convenience and ease.

 Service	Meet customer needs and exceed expectations	▲
We work hard to maintain a level of service that exceeds expectations, and helps businesses grow and succeed.		
 Teamwork	Work together to achieve common goals	▲
Customers are not just part of our business, but the reason for it. We take pride in helping businesses grow and creating lasting partnerships along the way.		
 Integrity	Do the right thing every day	▲
Our customers are busy. We work diligently to offer the best solutions and earn the continued trust of our business partners.		
 Loyalty	Grow lasting partnerships with associates, customers and suppliers	▲
We've built solid relationships based on years of trust and success. We're here to help.		
 Dependability	Be there	▲
Businesses depend on us to supply key ingredients—and we'll be here when customers need us most. We value our role in our partners' success, and we take this responsibility seriously.		

THIS WEEK




Choice Angus Boneless Beef Tenderloin

\$10.95

per lb unit/case
 9 lb avg
 #13029

Our best grilling steak!
Prices Effective: 4/11/16 - 4/17/16

Open 7 days a week • Great Service • Large Selection • Quality Products • Low Prices • 100% Satisfaction Guaranteed

     **While Supplies Last**

Where Restaurants Buy Better
 www.smartfoodservice.com



POSITIONING: The complete distribution solution

KEY IMPRESSIONS

- Higher quality, product-focused photography
- Northwest color palette
- Use of words like 'dynamic' and 'master' makes Pacific feel comprehensive and trustworthy

VALUE PROPOSITIONS

- Our goal is to be your one-stop shop for all of your food distributing needs
- Wide selection
- Master food service distribution company
- With over 150 years of combined experience...


MEMORABLE MOMENTS

- Their generic name makes them difficult to find in search results
- Product centered photography offers a unique point of view
- Priority shown to weekly and monthly price lists
- Utilize location tabs to highlight their reach
- Menu navigation doesn't show up until you scroll past the header

Pacific Food Distributors | Your first choice for quality food ...

pacfoods.com/ ▼


Pacific Food Distributors is a Master Food Service Distribution Company, otherwise known as a redistributor. We are located in Clackamas, Oregon, and provide ...




PACIFIC FOOD DISTRIBUTORS IS A MASTER FOOD SERVICE DISTRIBUTION COMPANY.

We're commonly referred to as a Re-D, because we distribute to other distributors. Our goal is to be one-stop shopping for all of your food service distributing needs!


HOW TO BUY FROM PACFOODS



We're here to take your calls from 6:00am-4:00pm, Monday - Friday. We are closed on major holidays. Our phone number is 503-607-1000.



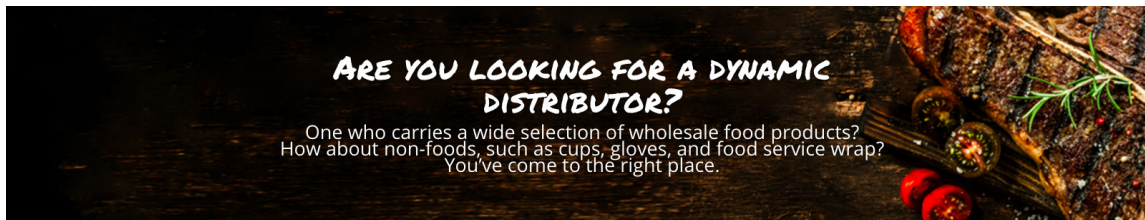
If you're a potential new customer, please download our credit application here. Once we have received it and you're approved for purchasing, a sales person will contact you.



A reminder: We do not sell directly to restaurants or the public. We only sell to other wholesalers, distributors & retailers.

ARE YOU LOOKING FOR A DYNAMIC DISTRIBUTOR?

One who carries a wide selection of wholesale food products? How about non-foods, such as cups, gloves, and food service wrap? You've come to the right place.




Pacific Food Distributors
 Food & Beverage Service & Distribution

Call Now Like Message ...

Timeline About Photos Reviews More ▾

Short Description	Your Pacific Northwest Choice for Quality Food Distribution! www.pacfoods.com
Company Overview	Pacific Food Distributors and Fazzio Fruit & Produce are Master Food Service Distribution Companies, otherwise known as redistributors. We are located in Clackamas, Oregon, and provide quality products to meat markets, supermarkets, and food distributors in Oregon, Washington, Idaho, California, and Alaska.

OUR PRODUCTS & PRICING

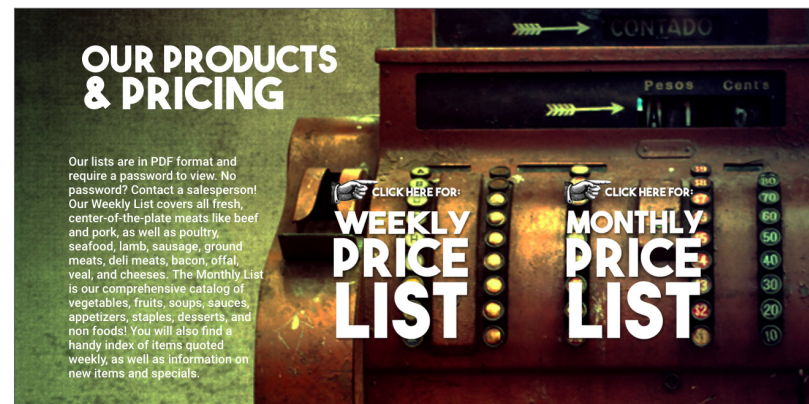
Our lists are in PDF format and require a password to view. No password? Contact a salesperson! Our Weekly List covers all fresh, center-of-the-plate meats like beef and pork, as well as poultry, seafood, lamb, sausage, ground meats, deli meats, bacon, offal, veal, and cheeses. The Monthly List is our comprehensive catalog of vegetables, fruits, soups, sauces, appetizers, staples, desserts, and non foods! You will also find a handy index of items quoted weekly, as well as information on new items and specials.

CLICK HERE FOR:

WEEKLY PRICE LIST

CLICK HERE FOR:

MONTHLY PRICE LIST



COMPETITIVE AUDIT

EJ FOODS & J&D REFRIGERATED SERVICES (OWNED BY PACIFIC FOODS)



E.J. Foods Ltd

www.ej-foods.com/

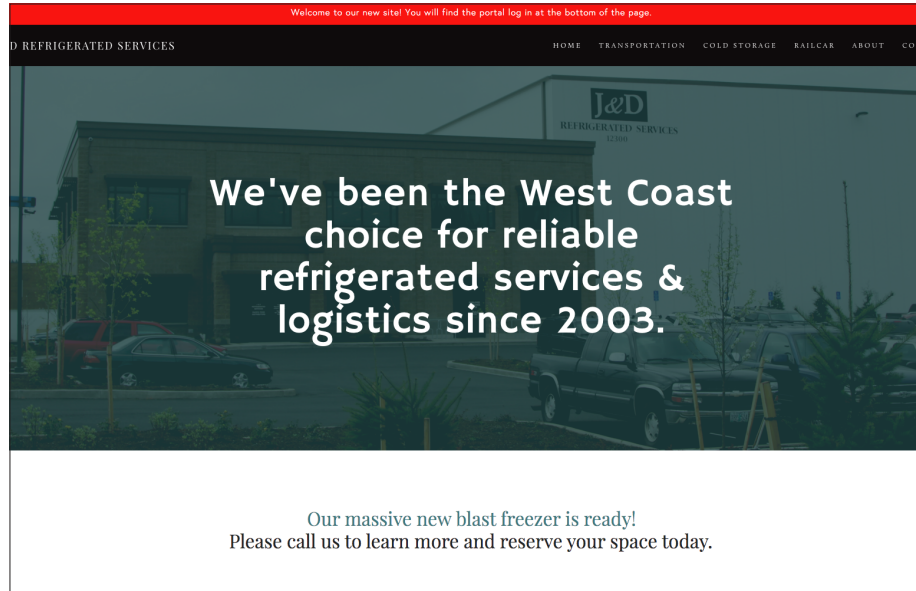
E.J. Foods Ltd specializes in selling Polish grocery products and licorms. Our company has been operating on the British market from 2007, cooperating with ...

Contact - New Products - Work - About us

Welcome to EJ Foods NW

www.ejfoodsnw.com/

... Products · Contact Us · Welcome · Products · Contact Us · Welcome to EJ Foods NW. 2307 Inter Avenue Puyallup, WA, 98372. 1-800-848-2841. 0 items. 0.



J&D Refrigerated Services

www.jdrefrigerated.com/

We've been the West Coast choice for reliable refrigerated services & logistics since 2003.

Contact

Our physical address is: 12300 SE Carpenter Drive Clackamas, OR ...

Cold Storage

Our new blast freezer is ready for your product. 80 pallets. -35 ...

Transportation

J&D Refrigerated is your best source in the Pacific Northwest ...

[More results from jdrefrigerated.com »](#)

About

Our growth was made possible by our great customers.

Railcar

J&D provides a level of customer service and communication that ...

Log in

Log in(active tab) · Request new password. Username *. Enter ...



You can now view your inventory & all transactions online! Don't have a password? Contact karen@jdrefrigerated.com

PLYMOUTH
COMPETITIVE AUDIT
 RESTAURANT DEPOT

Welcome to Restaurant Depot
 Where Restaurants Shop For... Savings, Selection & Service, Seven Days a Week

Member Portal Login

ABOUT US | LOCATIONS | MEMBERSHIP | WINE & SPIRITS | EVENTS & NEWS | KEEP IT KOOL | BUY EQUIPMENT | SERVICE PARTNERS | CAREERS | CONTACT US

STAY CONNECTED!
 LIKE US ON facebook
 Subscribe to us on YouTube
 Follow us on Instagram

BECOME A MEMBER SIGN-UP
 CLICK HERE TO LEARN MORE

ALREADY A MEMBER?
 Discover Your Online Member Benefits Here
 Search Products | View Shopping History | And More...
 ACTIVATE YOUR ONLINE BENEFITS

Wholesale Cash and Carry Foodservice Supplier

Restaurant Depot is a wholesale cash and carry foodservice supplier where you'll find quality products at low prices. We sell a broad selection of products for independent restaurants, caterers and non-profits:

- Fresh meat, poultry & seafood
- Fresh produce
- Dairy
- Provisions
- Groceries
- Frozen food
- Beverages
- Bakery supplies
- Bar supplies
- Catering supplies
- Coffee supplies
- Cleaning supplies
- Disposables
- Foodservice Equipment

PURCHASE EQUIPMENT AND SUPPLIES HERE:
The RDstore.com
FINANCING AVAILABLE
BUY NOW 90 DAYS PAY LATER
 TAX DEDUCTIBLE - 90 SECOND APPLICATION - APPLY TODAY!

Restaurant Depot
www.restaurantdepot.com/

Restaurant Depot offers one-stop shopping for food, equipment, and supplies at convenient locations across the country.

<p>Location If no location appears close to you, check again soon as our ...</p> <p>Membership SIGN UP FOR MEMBERSHIP. Join Restaurant Depot now for FREE ...</p> <p>Flyers Subscribe to receive flyers by email: For all of your Equipment ...</p>	<p>Employment Welcome to our employment page - we're glad you decided to stop ...</p> <p>Keep it Kool Solutions for Every Order Size. Keep it Kool!® Guide - Keep it ...</p> <p>About About Us. Members-Only Wholesale Cash & Carry ...</p>
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POSITIONING: The one-stop shop

KEY IMPRESSIONS

- Extremely cluttered user experience
- Broad use of colors creates visual confusion
- They sell advertising space on their website

VALUE PROPOSITIONS

- Where restaurants shop
- Savings, selection and service, seven days a week
- To be your one stop **warehouse**

MEMORABLE MOMENTS

- 360-degree virtual warehouse tours, powered by Google Maps

PLYMOUTH
COMPETITIVE AUDIT
 RESTAURANT DEPOT



"To be your One Stop Warehouse for Savings, Selection and Service, Seven Days a Week"

PLYMOUTH
COMPETITIVE AUDIT
WESTERN BOXED MEAT



POSITIONING: Wide array of packaged protein products

KEY IMPRESSIONS

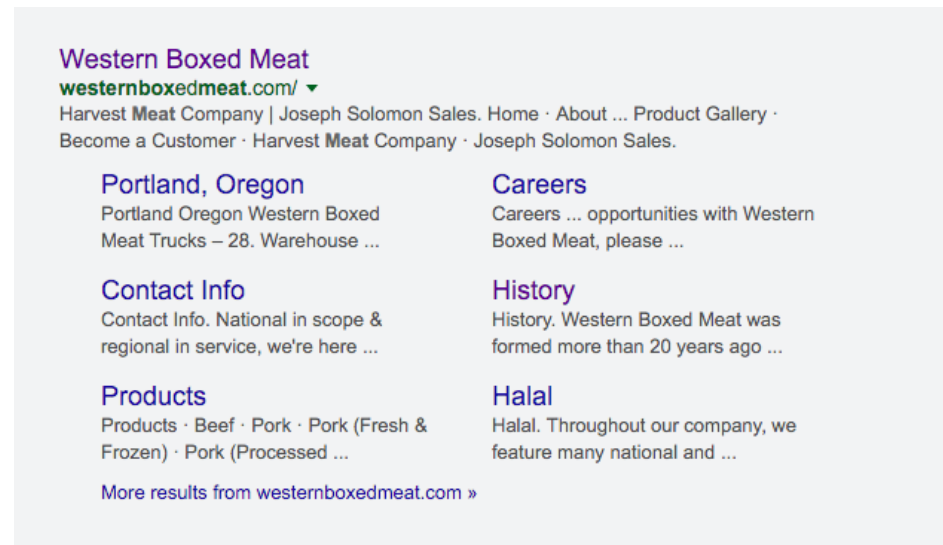
- No meta description
- Same exact site used for Harvest Food Distributors
- Bold pictures of raw meat make it clear what they sell

VALUE PROPOSITIONS

- Purveyors and distributors of a wide array of packaged protein products
- Tap into our buying power and vast distribution network without sacrificing quality customer service
- Our tested and true simple business philosophy - “growth”

MEMORABLE MOMENTS

- The red bull horns are hard to erase from your mind
- En Espanol prominently displayed in multiple places
- Beef, pork and chicken visual cutting guides



PLYMOUTH
COMPETITIVE AUDIT
WESTERN BOXED MEAT



*Purveyors and distributors of
a wide array of packaged protein products*

RECOMMENDATIONS FOR DIFFERENTIATION

POSITIONING

- Own a position
- Make it direct & consistent
- Make it actionable

RECOMMENDATIONS

- In this market, it's extremely difficult to stand out on product selection, price, quality or service
- There is an opportunity to be the trusted-advisor. This is a component of service not being own by your competitors.
- Tactically, use high-quality product photography with a unique perspective
- Say less and keep the focus on what the customer wants from your site (requirements TBD for current customers, future customers and potential employees)

EXECUTIVES INTERVIEWED

1. Kim Hunter - General Manager
2. Steve Russell - Senior Sales Representative
3. Scott Wallawine - Beef Buyer, GM of Vanguard
4. Sean Michael Bryant - Distribution Manager

KEY FINDINGS

- **We identified two key buying preferences within your customer segments:**
 1. **Price Sensitive** (price, service, product, terms): “There are certain customers who will buy on price first and they don’t care what the product is.”
 2. **Product First** (product, price, service, terms): “If you don’t have the right product in the specific thing they want, I guess you could say price doesn’t matter.”
- **New market growth will most likely happen outside of Washington and can be fueled by focusing on the Hispanic demographic:** Washington is a saturated market. The largest opportunity for future growth is in the other West Coast states, using the strategy of focusing on your best performing demographic, “The Hispanic business has been a big part of growth.”
- **A new facility would add strength and credibility to your expanding market reputation:** While an added expense and risk, multiple people mentioned high quality facilities when talking about your competitors. “I want my customer base to know that we’re cutting edge. We are industry leaders on facilities and buying.”
- **There’s an opportunity to own the role of trusted advisor and “first call”:** Further empowering customers with buying advice, based on the markets, and being willing to take a position can help Plymouth earn the role of trusted advisor - potentially leading to increased loyalty.
- **A relevant analogy came when describing your competitor:** “He’s in his fifties and he has a lot of good years left, but he also has that maturity and wisdom. He garners respect and brings people up alongside him.”

STRENGTHS

Showcasing employee longevity is another way to establish credibility with customers:

- “Because of the long-term employment of most all our employees, people see that as a value and as a place that must be doing something right.”

The buyers and the drivers play incredibly important roles:

- “Drivers are the face of the company.”
- “Huge service touch point.”
- “On the sale and buyer’s side, we’re not seeing our customer all the time, but our drivers are.”
- “Buying is the heart of our company.”
- “All comes down to our buyers.”
- “They’re [the buyers] helping formulate the opinions of what the market is going to do.”

Follow-thru is a core area of competitive advantage:

- Service and follow-thru can be the x-factor in customer buying decisions.
- Team is the “best of the best in the industry.”
- New markets have unreliable distributors.
- Desired perception in the industry – “these guys are great on price and will work with you on price, but they deliver what they say they’re going to deliver.”
- “There’s a lot of people down there talking to them (customer accounts in California), and not delivering what their promise is.”

The importance of an ownership mentality:

- “Our buyers can make decisions. They don’t have to get my approval. We don’t have to get the owner’s approval. People have the autonomy to do what they need to do, and make decisions, whether it’s working with the supplier or a customer.”
- When describing Pacific Foods’ competitive advantage, “Owner who is actively involved, who is doing a lot of the buying himself, and so he’s willing to take some risks.”
- “We have a tendency to give people more responsibility, and not have some of these extra positions, and then the theory is we can be more profitable and share the profits with the employees.”

Helping customers and employees reach their full potential is a driving motivator:

- “I was able to figure it out with him. This is what’s going to make you work and succeed and he became the best guy...I went from wanting to get rid of the guy to he was one of the top guys.”
- “I think everyone at Plymouth has a story of how Plymouth has helped them in a way that people know or don’t know. I have a ton of these stories.”
- “I help mentor some of the less experienced sales people.”
- “Seeing something you’ve been working on that actually comes together...you can check it off the list. Let’s move on to the next thing.”
- “Proud of their work and what they do.”
- “Our ultimate goal is to help them [our customers] be the best they can be...helping them get where they need to get.”

WEAKNESSES

Lack of necessary talent to fuel future growth:

- There's a gap between the top staff and the next level within the organization.
- Because of the culture of hiring from within, many employees have no other work experience to draw from.
- This creates the need for outside talent or an investment in extensive employee training and development.

Lack of a new facility which would add strength and credibility to your expanding market reputation:

- Multiple people mentioned high quality facilities when talking about competitors Pacific Foods and Western Box.
- How do you want Plymouth to be perceived? "In a perfect world, we would have a nice new facility."
- "When I get down there, I want my customer base to know that we're cutting edge. We are industry leaders on facilities and buying. I don't want to look so much like a mom and pop when I get down to California. I want to look like the guys that are moving and shaking and making changes or being leaders, rather than just some company that's out there knocking on doors."

OPPORTUNITIES

Hispanic retailers and distributors are a key target audience and an area of focus for new market penetration:

- “The Hispanic business has been a big part of growth.”
- “The Hispanic market buys beef as their number one protein, and the shelf life gives you more flexibility.”
- “Hispanic has grown huge. That’s probably our biggest growing category.”

Washington is a saturated market. Growth will most likely happen in other West Coast states:

- The reason future growth is not in Washington is, “we’re saturated here, we’re just so saturated.”
- “Like I said, up here, it’s pretty saturated.”
- “Oregon, California, Nevada, Arizona, Texas...”

Being able to distribute weekly buying advice could strengthen customer relationships and spur new account growth:

- “We have a weekly sales meeting every Wednesday, and the buyers give an update on their category. They also hand out a sheet that lets the sales people know on every item, is it going up or down, or flat for the next week, and approximately what is that change? We call it a pricing index. On a scale of 1-10, what does this price represent right now? This allows our sales people to talk more intelligently to our customers.”

- “Should I wait and order just a little bit to get me through the week? Or can I order heavy next week to take advantage of those market variances?”
- “If you can build a credible relationship with your customer, they rely on us for some of that speculation.”
- “They call us up and say, ‘why is this beef market doing what it’s doing?’”

There’s an opportunity to own the role of trusted advisor and first call:

- “They’ll listen to us as far as what we think is going on in the industry, market, in meats.”
- “Being willing to take a position.” (this demonstrates a high level of expertise and a sophisticated organization)
- Customers know the items they want but not the trends of the market. In certain cases, customers trust Plymouth so much they call with an open mind on items to order based on market advice.
- This may be an area which could increase customer loyalty.

THREATS

Pacific Foods was the most admired competitor because of both how they approach business and their founding story:

- “I’m not sure if you know the history there...”
- “He took all his best people,” “Got to build from the ground up.”
- Don’t discount the role of story in memorability

Consolidation, both on the buying and selling side, is an important industry trend:

- “There’s far fewer chicken, turkey, pork companies. It makes it tough for us because we used to partner up with another small company, but a lot of those packers have been purchased.”
- “The Washington market has very few independent retailers anymore.”
- “Our business with QFC is just a fraction of what it was five years ago because they’ve been bought by Kroger.”
- “There’ll still be a need for fresh items, but we end up losing a lot of the frozen business.”

The team views the direct-to-supplier relationship as the most dangerous threat to your business:

- “If they’re going to continually go around us to our manufacturers, do we need to protect ourselves and start selling to some of those end users?”
- To protect the relationship with large vendors, “it really is a partnership with them, rather than just a customer/buyer/seller deal.”

KEY ATTRIBUTES

- **Agile:** Able to respond to market trends and adjust quickly to meet customer needs. Everyone in organization empowered to make things right.
- **Stable:** Established, long tenure, strong buying power, dependable for delivery and product need, admirable reputation for new markets
- **Entrepreneurial:** Ownership mentality, constantly improving, new technology, buying methods, services lines, whatever it takes to meet customer needs.

TO DISCUSS:

- **Agreement on the key findings**
- **Who is the core customer for regional expansion?
And how does Vanguard fit into this?**
- **Is it realistic to purchase a new facility? Can we have
more context on this situation?**
- **Our recommendation on the new name**