

Growth Advisory Update – The Guide to Shopping at LIDL



Communicating the LIDL Experience June 2017



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LIDL – Doing Things Differently in Grocery Retailing

LIDL is anything but a traditional grocery store – they have uniquely positioned themselves in the initial markets they have entered as an alternative to traditional grocery. Their tagline is asking shoppers to “Rethink Grocery” and from initial shopper reactions from the Grand Opening to three weeks later as shoppers are settling into the LIDL experience, they are clearly disrupting the traditional grocery shopping experience.

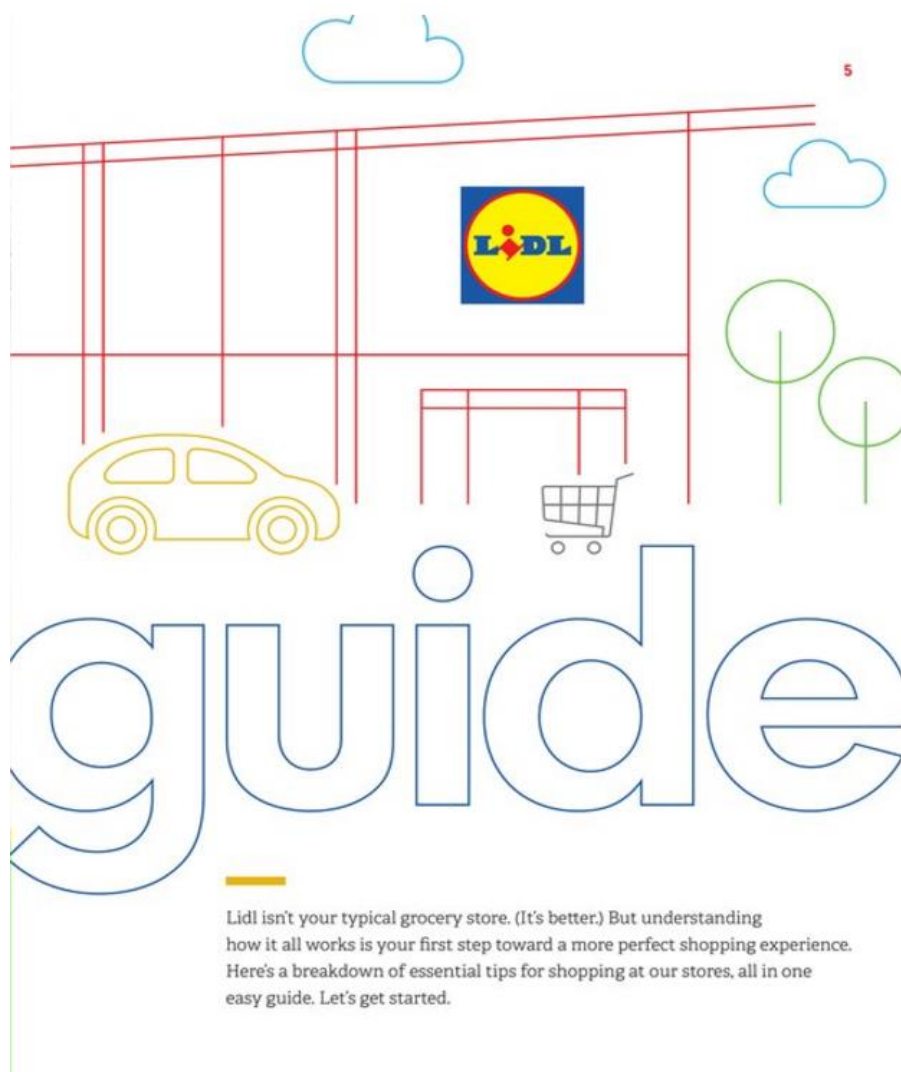
For this Growth Advisory Update, we thought we would go back to the LIDL pre-Grand Opening communication – their first issue of the quarterly LIDL Magazine – Issue 1 – June 15 – August 31. We wanted to take each of our readers through the comprehensiveness of their shopper communications strategy. Without question, the summarized following pages are going to paint a picture of a different grocery shopping experience.

Brendan Proctor, the LIDL US CEO, starts off the first issue of the LIDL magazine by recognizing the efforts of the hundreds of LIDL US employees who have made the launch of their US business a resounding success from a timing and market positioning perspective. Additionally, he clearly articulates the LIDL value creation story, in very simple terms telling every reader why LIDL is different – no hype – just simple facts to create in the shopper mind why to come and shop at LIDL.

“We do things differently at LIDL. Shoppers are going to experience less complexity, lower prices, better choices, and can shop with better confidence – this is grocery rethought.”

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“This guide is one of the best I have ever seen. I have never seen this from a traditional grocery retailer.

It told us the story of both what LIDL had to offer as well as what to expect when we went to the store.

We were not disappointed and shared this with a number of our friends”.

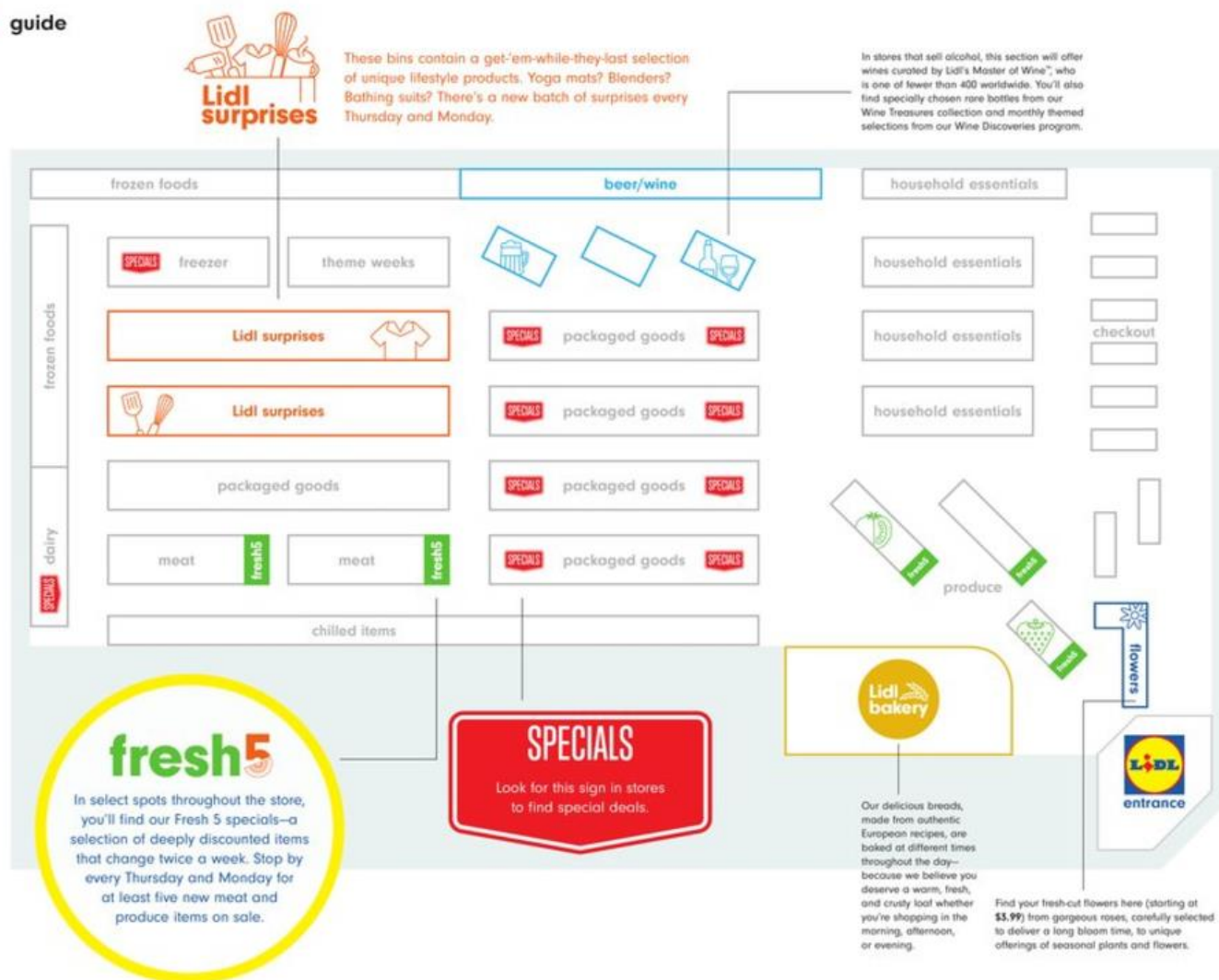
-- A Day One LIDL Shopper

In their launch, LIDL made a significant effort to inform the consumer/shopper about LIDL, helping them understand what to expect in the store, providing a simplified the in-store shopping experience through a well defined store layout, articulating clearly the LIDL product promise, and helping shoppers understand how to purchase products with increased confidence. All of these communication efforts were tightly integrated providing to the shopper a “seamless” understanding of LIDL, including the confidence of coming to try LIDL as a grocery alternative.

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SIMPLE, SIMPLE, SIMPLE. Six aisles, well understood aisle offerings, a focus on the emotional purchases – FRESH, SPECIALS, and BAKERY and FLOWERS, expert advice as demonstrated in wines, a return to shopping excitement through the “Surprise Aisles”, and theme week innovation. The LIDL message – we have the basics for the entire shopping experience plus more.

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The Grand Tour

A map of our stores' can't-miss features.

Ever notice that when you visit a grocery store that's not your usual go-to, your shopping takes double the time? You find yourself schlepping your shopping cart up and down the aisles trying to find the ketchup. Talk about frustrating! We get you. That's why all Lidl stores feature the exact same layout, which means you can easily track down that ketchup, no matter where you're shopping. And, of course—every single store features the same high-quality, low-price selection you expect from Lidl.

Your Guide to Our Promotions

At Lidl, our week starts on Thursday. That's when you'll find a new set of special products and discounts, handpicked by Lidl's Buyers. Here's a sampling of the treats and finds that might wind up in your cart.

No. 294771

kitchen week

Make over your meal prep with modern appliances in brilliant hues and specialty items like mini deep fryers, crepe makers, and juicers. Get cooking!

No. 279568

kids' week

Our children's toys are carefully chosen to encourage imaginative play. Surprise your little ones with a toy workbench, learning puzzles, or wooden train tracks and play trains.

No. 281221

fashion week

Our Lidl surprises aren't just for your home—you'll also find stylish clothing and accessories to spruce up your wardrobe. From men's leather dress shoes to trendy women's vests.

Every Thursday and Monday, we offer a selection of lifestyle products. You might see special baby products one week—possibly onesies, diaper bags, and pacifiers—and the next week, we'll have home improvement items like power washers and electric hand drills. Or we may have kitchen goods (maybe a blender or some great cooking pots) on Thursday and then sporting goods (from yoga mats to running shoes) on Monday. The most important thing: These picks are only in store for a short time. Don't miss out!

fresh 5

Every day, we offer a selection of at least three fresh fruits and vegetables and two meats at extremely low prices. We switch up the items halfway through the week, so there's always something new to discover when you visit.

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W

5 items on sale
thursday through
sunday

5 items on sale
monday through
wednesday

flavors from around the world

Our theme weeks feature get-'em-while-they-last imported foods, all picked to spotlight a specific country. Look for similar themes in your store starting each Thursday!

italian week

Indulge in bruschetta, giant pizzas, and Tuscan almond biscotti. Delicious!

greek week

Find Mediterranean specialties, like grillable halloumi cheese, authentic olive oils, and savory cheese spanakopita.

french week

Don't miss out on Parisian picks such as French macaron baking mix, silky escargot, and fatty pastries. Bon appétit!

price reductions

Each week, we handpick a selection of items to offer our shoppers at even greater savings than our already super-low prices. It could be wine, cheese, or chips—or it might be household necessities perfect for stockpiling, like paper towels and detergent. This deal starts on Thursdays, and only lasts for one week. So move fast!

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All items are purchased directly with select U.S. food producers. Prices are subject to change without notice and may vary by location. All items are sold as-is. Lidl is not responsible for any damage or injury caused by the use of any product. Lidl is not responsible for any damage or injury caused by the use of any product.

Prices of the store may vary depending on location. Some products purchased may vary from others.

THE GRAND TOUR – LIDL made a significant effort to help shoppers understand the promotional offers that LIDL brings to the market on an ongoing basis.

- **It all starts with Fresh, where LIDL features five specific fresh items in two specific week parts (Thursday – Sunday and Monday-Wednesday).**
- **LIDL features (with a very high degree of cuisine authority) flavors from around the world. When they feature a world cuisine, they own that cuisine for the week. And they keep introducing the local market to “ongoing flavor innovation”.**
- **Their “Surprise” section of the store is all about helping shoppers splurge a little with innovative lifestyle purchases using selective LIDL private brands and general merchandise.**
- **Specials – weekly hand-selected specials to further provide value to the shopper on an ongoing basis.**

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Lidl Logos to Look For

Three things we want you to know about some of our products.

NO ADDED MSG
NO CERTIFIED SYNTHETIC COLORS
PER SERVING

LIDL Love it!
Guarantee
✓ money refunded
✓ item replaced

CONSUMER TESTED

The Lidl Way

How we save you time (and money).

we call it...	what it means:	for you:	for us:
curated assortment	Our product selection is carefully curated to offer only the items we consider top quality and best value.	You'll spend less time debating which ketchup to buy. Who needs 50 types anyway? We've already done the vetting for you, so you know every pick is a great one, at a great price .	The fewer hours our employees spend restocking and organizing shelves, the more savings we can pass on to you.
line management	When our checkout lines start to get long, we'll open another cashier station.	Less time waiting in line, which means more time doing the things you enjoy .	Line management helps improve the flow of our stores, allowing for easy aisle access and a faster shopping experience.
in-case produce	Instead of stacking produce in fancy displays, we leave it in the cases it arrives in.	Less handling of your produce and lower prices. Fewer people will touch your apple (or pear, or avocado...) and you aren't paying for someone to unpack each case.	We're able to restock quickly and easily. Any employee can help, not just the ones who can make a pretty stack.
cross-trained employees	Our staff is trained to work in any and all departments.	You can ask any employee any question and spend less time waiting for someone to help you.	If we need to shuffle team members to staff busy departments, we can make it happen quickly. Streamlining our staff means more savings for you .
standard store layout	Every Lidl store uses the same aisle layout for organizing products.	No more wasting time hunting for your favorite items if you're visiting a different store. They'll be in the same place, even if you aren't.	Redesigning every store isn't efficient. Keeping our layout the same saves you and us time and effort.
data-driven tasks	We use data to schedule cumbersome tasks, such as restocking and inventory, to take place during low-traffic shopping hours.	You won't trip over employees while shopping our aisles, so you can get your shopping done quickly.	Our staff has the time to focus on achieving the task at hand as productively as possible.

*DISCLAIMER: The Lidl Love it! Guarantee does not include Lidl Signature items, alcohol, national branded items, or returns not related to product quality or customer preference. Products must be returned in original packaging. Applies to one item if multiple quantities of the same product are purchased. Exceptions may apply.

LIDL Logos to Look For – “How we save you time (and money)” – a spectacular way to communicate the importance of LIDL private label, for both the shopper as well as LIDL.

- **Curated assortment** – simplifying the choice debate – and realizing a great price
- **Checkout line management** – more time to spend on the things you want to do
- **In-case produce** – less handling, better quality, all at a lower price
- **Cross-trained employees** – people who can really answer your questions
- **Standard store layout** – no wasted “hunting time” – always in the same place
- **Data-driven tasks** – scheduling store tasks when you are not there

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The Shopping Bag 411

How to pack your shopping bags like a pro.
Fruit, cereal, eggs, milk—you've got your essentials, your extras, and then some. At Lidl, it's up to you to get those goodies from your cart into your bags, and here are a few simple tips to make loading those shopping bags easy and efficient (without any broken eggs). Here's a hint: You have to think from the bottom up.

top
Don't crack the eggs! Place lighter-weight items at the top of your bag in order to prevent runny yolks, squished bread, smashed potato chips, or other food malfunctions.

middle
Mid-size boxed products and awkwardly shaped items make the perfect filling for your shopping bag sandwich.

bottom
It starts with a solid foundation. Canned foods and heavier items make a great base layer for getting your groceries home without hiccups.

pro tips
To prevent any accidental cross-contamination, place cleaning products, meat, and fresh produce in separate bags.
Create structure by placing boxed goods, such as cereal or crackers, along the outside of the bag.
For faster bagging at checkout, group items as you place them on the checkout counter.
Wipe down reusable bags regularly to keep everything squeaky clean.

Three Great Reasons to Bring Your Own Bag

01 the savings are in the bag

There's no such thing as a free bag. We don't add the cost of "free" bags into our products, so BYO or buy one here and use it forever.

02 protect your world

According to the Environmental Protection Agency, consumers in the United States use more than 300 billion plastic bags a year. Those bags require 12 million barrels of oil to create yearly. Going reusable reduces your carbon footprint and saves precious resources. Win-win.

03 shop with confidence

Who has time to worry about an epic plastic bag fail? The extra structural integrity of Lidl's reusable shopping bags decreases the chances that an entire jar of marinara sauce will come crashing down on your spotless kitchen floor.

About Our Mobile App

Check out Lidl's app, your new shopping buddy, for tons of helpful features.

- Collaborative shopping lists that automatically sync with your family and friends
- Special access to our new recipes—tailored to your preferences
- And more
- Shopping lists that can be viewed as a list or by photo
- Check product availability
- Easy access to weekly offers

“Rethinking how to pack a shopping bag” – The simplicity of both reminding experienced shoppers how to optimize packing their shopping bags, as well as educating new shoppers on “best practices” in shopping bag packing, is part of the LIDL simplified shopping experience.

Their tag line – **“Bag Like a Pro”**.


And the LIDL mobile application – LIDL positions this application as your new shopping buddy with features such as collaborative family and friends shopping, personalized shopping lists which can be viewed as a list or photo reminders, reliable product availability in store, and seamless access to weekly offers.

Education is at the core of the LIDL experience helping shoppers make more informed, highly simplified, and cost effective decisions.

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go local


Our tomato supplier grows fresh picks just a few hours from our Virginia headquarters.

It was an easy choice to select Red Sun Farms as one of our tomato growers. Its program of sustainable growing techniques strives to produce super-fresh, nutritious, and flavorful tomatoes. At the farm's location in the southwest Virginia town of Dublin, farmer Thierry Legros (pictured above) grows an array of red vine tomatoes, cocktail tomatoes, and cherry tomatoes inside an advanced, controlled greenhouse. The greenhouse system allows Red Sun to operate using just one-fifth of the water that it takes to grow field tomatoes. Plus, the protected, closed environment enables the use of nonchemical pest control methods, such as using "bait plants" to lure pests away from the crops and releasing natural predators like ladybugs to snatch pests at the source. Red Sun values "local" as much as we do—including employing the region's bumblebees to pollinate its tomatoes and improve uniformity among the crops. The overall result? Great-tasting tomatoes that help promote a greener environment.


Our Regional Farmers
Lidl's growers supply our stores with produce ranging from cabbage to cucumbers. Here's where we get some of our fresh picks.




- 1 **Shenandoah Growers**
Potted and Kitchen Herbs
- 2 **Fresh2O Growers**
Butter Lettuce, Mixed Leaf Lettuce
- 3 **Red Sun Farms**
Cherry Tomatoes, Tomatoes on the Vine, Cocktail Tomatoes on the Vine
- 4 **Charles Gray & Sons**
Cabbage
- 5 **Perez Brothers**
Bell Peppers, Tomatoes, Eggplant
- 6 **Hispanic Women Growers**
Peppers, Tomatoes
- 7 **Beechwood**
Squash, Hot Peppers, Tomatoes
- 8 **DL&B**
Bell Peppers, Cucumbers, Squash, Eggplant
- 9 **American Blueberries**
Blueberries
- 10 **Atlantic Fresh Trading**
Broccoli



← vine tomatoes
Picked from greenhouse vines at the "breaker stage," or that exact moment when the fruit first turns from green to its signature color. Once out, tomatoes continue to ripen en route to Lidl stores, ensuring that they're at peak ripeness and flavor when they reach you. They're perfect to slice for a sandwich.



← cocktail tomatoes on the vine
Sized somewhere between a cherry tomato and a Roma tomato, cocktail tomatoes are perfect for snacking or tossing in salads and pastas. They are especially juicy and sweet.



← cherry tomatoes
Not to be confused with grape or cocktail tomatoes, cherry tomatoes are the size and shape of—surprise!—cherries. They're great for eating raw and make a tasty addition to a salad dressing or marinade.

“Go Local” – The promise of farm-to-store freshness is at the very core of the LIDL fresh promise. Inside the store, LIDL communicates its ongoing commitment to local sourcing of sustainable products.

In the store they highlight where many of their fresh products are sourced from, confirming to the shopper that they are providing the freshest produce, grown in sustainable conditions, at the lowest prices, through local farmers and growers.

Again, simple messaging on the LIDL fresh value proposition to the shopper.

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“Redefining the Meat Experience” - a LIDL strategy to differentiate in one of the most emerging competitive departments of grocery retailing.



here's a recipe for creating a grocery meat department from scratch: Start at the beginning. Research. Learn each and every detail. Look again. Improve. Commit. Repeat. Repeat. Repeat.

At least, that's how Lidl approached it. "For us, the process started with looking at the market," says Senior Purchasing Manager Matthew Flynn, who has spent more than two years developing Lidl's meat department offerings. "I think we realized very quickly that in the meat world, it's a very consolidated supply market, meaning that you don't have a lot of processors. It's the suppliers dictating to the retailers what product, at what quality, and at what price. For our mindset, it was always about disrupting that market."

So that's exactly what happened. Rather than settling for working only with the largest and most prolific processors—who typically offer a set menu of products in order to increase their production volume—Lidl's team went searching for the right partners who would help them start fresh. "Our biggest challenge was finding suppliers that see the vision from the beginning. And in every single category, we found them," says Senior Purchasing Manager Bradley Schmitt. "These suppliers range from the largest in the world to private, family-owned companies. And they've all bought into our vision. It all comes down to consistent quality, consistent value, and dependability."

To find that level of consistency, Schmitt and Flynn worked closely with the suppliers to hammer out every detail, both large and small. They flew to Germany to examine state-of-the-art equipment. They pored over the trays that the meat would be packaged in. They talked about the label designs. They learned about cattle breeds, types of feed, and dietary standards. They considered how the product would be shipped to the stores, and how the process could be modified to be more efficient. And only once all of that was determined, they figured out what cuts would be sold in stores.

True to Lidl's mission, Schmitt and Flynn wanted each and every cut to offer something of added value to the shopper, and they knew they had to adapt their approach

to get it. They had to think less like a traditional grocer and more like an artisanal butcher. "We're taking behind-the-counter, butcher-shop quality and putting it in a meat case, at a price that's incredibly low," says Flynn.

Lidl wanted to take a curatorial approach to the specific cuts that would be available, while retaining a focus on exceptional quality. To do this, the Lidl team re-examined how to package certain premium meats to increase value for shoppers—such as working directly with meat cutters to turn top sirloin steak into smaller, more manageable portions. Lidl collaborated with suppliers to develop new-to-the-US techniques for portioning standard offerings, like the pork shoulder. At Lidl stores, beef is graded as USDA Choice, a federal designation that indicates a high degree of marbling and tenderness, and our core selection is sourced from Black Angus cattle—even the ground beef.

"The Angus breed is known for its consistency and meat quality," says Flynn. "By saying we're entirely Black Angus, we can guarantee a certain standard of quality."

"For our mindset, it was always about disrupting that market."

—Matthew Flynn, Senior Purchasing Manager

While a top-quality finished product is a priority, the source of the meat also matters. Part of that includes a transparent supply chain. All of Lidl's meat suppliers submit information about their livestock, including details on how the animals were handled and assurance that all medicines and vaccines were administered and approved by on-site veterinarians. Lidl's current beef supplier for US stores exclusively sources cattle from regional, US-based ranchers with whom he has a personal relationship. Rather than the crowded, isolating crates of many industrial farms, Lidl's pigs live in group housing—a more appropriate setting for this social animal.

"How the animals are treated is important not only to many consumers, but to Lidl," says Schmitt. "A lot of modern families want transparency. They want to know what they eat. In the past, people didn't really care where it came from—they just wanted it on their plate for a good price. Now they want the quality, they want the price, they want the transparency. And Lidl is able to give that to them."

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52 **Lidl life hacks**



the best ways to store food

In the United States, about one-third of consumers' food gets thrown away. That's a lot of meals going uneaten—and a lot of wasted money. Sometimes it's because of food that spoils faster than we can eat it, and sometimes it's because of leftovers not being stored properly. We're here to help. Follow this guide to help reduce waste, improve taste, and keep all that good food you just bought, well, good.

Seafood, Poultry, and Meat Store in the original wrapping. Re-wrapping increases the risk of exposing the food to bacteria. If it didn't come in a tray, slide a plate underneath it to catch any stray drippings from spreading through your refrigerator.

Cheese Store hard cheeses in the store's original wrapping until use, then re-wrap in wax or parchment paper (topped with looser plastic wrap) to keep the cheese from drying out or picking up other flavors.

Leftovers Refrigerate leftovers within two hours of cooking to limit the growth of harmful bacteria. You can divide your cooked food into smaller, shallow containers so it cools faster, but it's not mandatory.

Fruits and Vegetables Hold off on washing produce until just before eating or cooking with it. Washing before refrigerating can leave dampness that encourages mold and rot. Keep fruits and vegetables separate and store by type: berries with berries, apples with apples, and so on. Fruits and vegetables give off different gases that can cause others to ripen faster.

prolong your produce

Easy ways to help your fruits and veggies last longer.

apples
When stored on the counter, eat apples within three weeks. Store in the refrigerator (away from strong-smelling foods) to keep crisp for up to six weeks.

avocados
Store uncut, firm avocados at room temperature for up to a week until ripe. **Ripen it up:** Place in a paper bag with a banana or apple, and the avocados should be ready to eat in a day or two.

bananas
Keep bananas at room temperature for up to a week. The cold refrigerator will turn the skins gray! **Ripen it up:** Place in a paper bag either alone or paired with an apple for even faster ripening.

berries
As one of the most fragile fruits, berries can get moldy if stored after washing. Instead, keep dry and unwashed berries in the refrigerator crisper drawer.

citrus
Store in the refrigerator crisper drawer; loose, for the longest life—citrus fruit should last for up to three weeks.

grapes
Store grapes in an open or vented bowl in the fridge for up to a week. They'll last longest if you don't wash them first. Use the grapes that have fallen from their stems first, and avoid storing them near strongly scented produce like green onions so they don't absorb odors.

leafy greens
Lettuce, spinach, kale, and other leafy greens can be refrigerated for three to seven days. If leaves aren't pre-bagged, wash and then wrap loosely in a paper towel to keep the water from rotting the leaves. Keeping lettuce whole will help prolong its shelf life.

mushrooms
Store refrigerated in packaging for up to seven days. If the mushrooms are sliced, they'll spoil faster.

peaches, pears, and plums
Store firm, unripe fruit at room temperature. Once ripe, they'll last in the fridge for another five days. **Ripen it up:** Place a hard peach, pear, or plum in a paper bag with a banana to soften.

peppers
If not used right away, refrigerate peppers for up to two weeks in the vegetable drawer. Storing them at room temperature will keep them fresh for a few days.

potatoes
Store in a cool, dark place such as a pantry or garage closet for up to a few weeks. The only exception: baby potatoes, which last for no more than 10 days.

tomatoes
Store in a cool, dry place—but not the fridge! The excessive cold renders tomatoes tasteless. Once ripe, eat within five days. **Ripen it up:** Keep at room temperature, placed stem up, to encourage ripening—most tomatoes will ripen within a day or so.

Lidl Giant Lunch Bags
No. 214363
\$1.89* (10 ct)

Lidl Gallon Zipper Bags
No. 214383
\$1.99* (40 ct)

Lidl Heavy Duty Aluminum Foil
No. 214406
\$2.69* (525 sq ft)

SOURCES: USDA, American Cheese Society, USDA, The Huffington Post
*DISCLAIMER: Supplies of select products are limited and may not be available in all stores. Prices in this magazine may vary and may be higher in some stores. Prices are subject to change and product availability, and are valid for a limited time.
SOURCES: U.S. Apple Association, Avocado Council, Coast's Harvested, California Strawberry Commission, Oregon Raspberry & Blackberry Commission, California Table Grape Commission, University of Idaho, USA Peaches, Florida Tomato Committee, UC Davis Postharvest Technology, USDA FoodKeeper App, Lidl Food & Vegetable department

“Prolonging Produce in the Refrigerator” – As indicated earlier, LIDL is all about delivering value for every dollar spent – every day, in every shopping experience.

They clearly achieve that goal in the store – with education, they are helping shoppers learn how to reduce waste at home by better managing their fresh purchases.

Their messaging is quite clear – no matter what item you purchase in fresh, we will help you keep it longer in your home, thereby getting better value from your LIDL shopping experience.

Again, simple messaging on the LIDL fresh value proposition to the shopper.

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“Every step in product quality certification makes a difference” – LIDL has and continues to use certification as a way to communicate quality at a low price.

Their certification standards are at the core of their mission statement and form the basis for how they provide transparency around their sustainability initiatives.

LIDL is attempting to clarify and simplify labeling for the shopper.



USDA Organic



Non-GMO Project



Fairtrade International



UTZ



MSC



True Source
Certified Honey



RSPO



Rainforest Alliance



ASC

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“We have shopped at our traditional grocer for almost thirty years.

After four trips to LIDL in the past three weeks, we will be using LIDL for most of our regular grocery purchases.

We basically get the same products at half the price – they are great quality –and we have not been disappointed to date”.

-- A focus group LIDL Shopper

Summarizing the LIDL Experience – Simple to shop, easy to navigate, both within the store and with their mobile application, extreme clarity around price to value relationships, simplified choices, local merchandise, solid alignment with the community, and well trained and helpful associates.

Basically – **“GROCERY RETHOUGHT”**.

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How do you compare: (Score on a scale 1-5 – 5 is best)

This short exercise helps understand how to play in a retail landscape where LIDL is a new competitor. We encourage using the assessment to help strategize and prioritize where to invest in real growth initiatives. LIDL will continue to refine their offer/shopper experience.

Shopping Experience Metric	Our Rating of LIDL	Your Rating of LIDL	Rating Your Banner
<i>Telling the story of what the banner stands for with simplicity</i>	5		
<i>Extreme clarity around price to value for the shopper</i>	5		
<i>Simplified, easy to navigate store layout and experience</i>	5		
<i>Clarity around promotions to help shoppers understand what to expect</i>	5		
<i>Educating shoppers on how to shop your stores</i>	5		
<i>Local community connection - both employee and sourcing</i>	5		
<i>Clarity in differentiating the fresh offer</i>	4		
<i>Clarity in differentiating the meat offer</i>	4		
<i>Knowledgeable and helpful associates</i>	5		
<i>Clutter-less stores during peak shopping times</i>	4		