



CBP 101

We take the complexity of the Canadian market out of your go to market strategy

Third Generation Family Business,
2020 marked our 75th Anniversary

Annual in Market Sales of over \$165 MM

We are a full service distribution partner
covering all regions, all channels –
serviced through strategically placed DCs
(Calgary/Toronto)

We are also a full service Industrial and
Foodservice distributor partner covering all
of Canada

Our Vision : *To make a difference in our community by delivering food Canadians love from around the world while providing the best experience & service for each of our clients, retailer partners and employees.*

Our Mission : *Through superior service and client partnerships, to distribute foods through a team built on communication, accountability, family values, and integrity.*



Our Culture

Team work : Encouraging open communication, successfully collaborating and leveraging the strengths of team members and supporting one another. we approach every business relationship, client and customer as a partnership and work collaboratively with each other to meet our goals.

People : To continue to foster the family business traditions and heritage established by our founder and create an environment that **empowers** our team to **lead by example** in everything we do.

Courage : Inspiring courage, forward thinking, problem solving, innovation and the capability of **constantly challenging the status quo**.

Integrity : Fostering a culture where we take **ownership** and **accountability** through transparency, honesty, timely communication, conducting ourselves in an ethical way with everyone we do business with.

Balance : Believing that good quality work starts at home, we stress the importance of a good work/life balance, and take intentional time to have fun together as a team.

Results :We constantly aim to deliver both superior client service and results

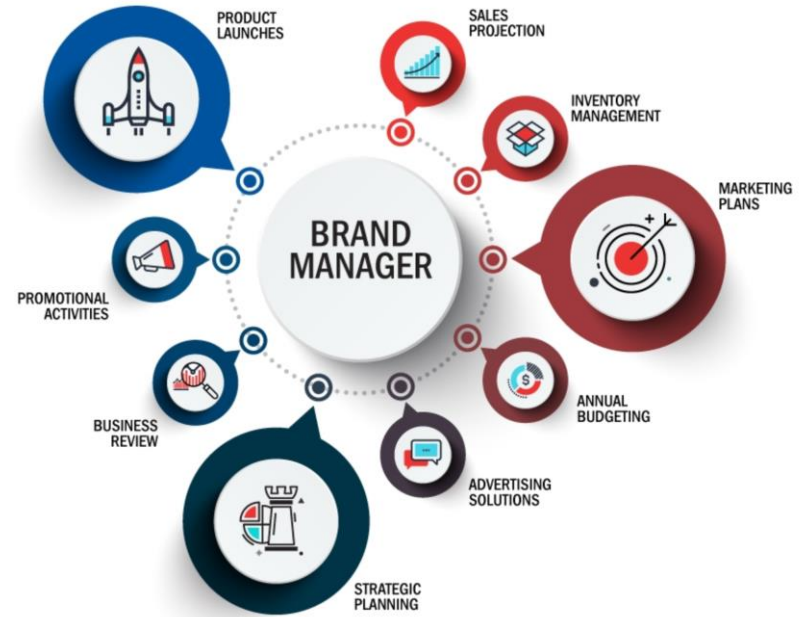
Learning : Fostering a culture that **Learns** together, **Wins** together and **Grows** together as a team.

For 75 years we have developed the right model and team for your business Nationally

Complete Supply Chain Management

Full Business Management & Marketing Team

National Sales Team (Key Account Management)



Why Partner with CBP

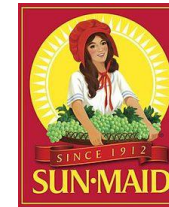
1. Our Culture – Our team works on your business as if it were our own, we become your “Canadian Division”
2. Transparency - where no decisions are made without collaboration, thus allowing Hormel to not only have input in the direction of their brands but also ensures decisions fit within their overall corporate strategy
3. Full Dedicated Team – from logistics to administration, sales to marketing, analytics and trade fund management & sales support staff
4. We deliver a Go To Market solution that customizes **YOUR** requirements and builds ***your brands*** in the Canadian Market
5. Our Cost To Serve approach presents one of the best values in the Canadian marketplace

Portfolio



Portfolio

Industrial + Food Service





**Your "TURN KEY"
Solution to Accessing
the Canadian Packaged
Goods Marketplace**

*Putting all the pieces together to
allow easy efficient access to the
Canadian Market Place*



OUR OBJECTIVE

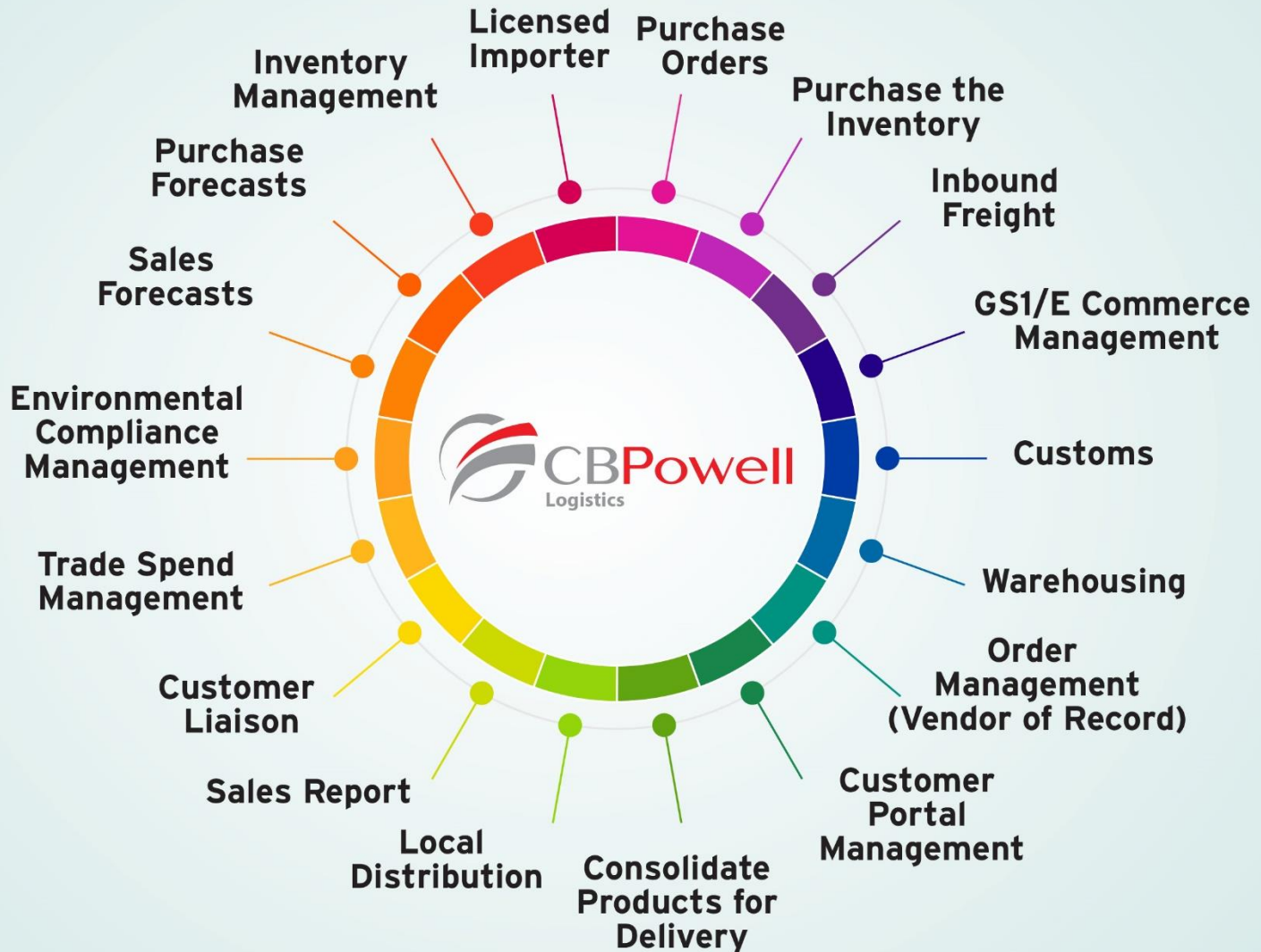
Provide customers with the

- Right product,
- Right quantity,
- Right place,
- Right time,
- Right condition/quality

at the

'Lowest possible optimal cost'.





Vice President Logistics

- Inventory and Transportation Management
- Logistics Costs Management
- Government Interface – CFIA, CBSA, Environmental Laws, etc.
- Contact for Logistics' Principals

Customer Service Coordinators

- Customer Liaison
- Order Entry
- Invoicing
- Monitor all 'Checks & Balances' in the Order Cycle Process



Transportation / Data Integrity Coordinator

- Carrier Management
- Item Master Maintenance
- GS1 / Retail Link/ Customer Portals/etc.
- EDI / AS2
- Monitor On-Time Delivery

Logistics Manager

- Warehouse Management
- Product Replenishment
- Inventory Accuracy
- Maintain all Import Records

Automated

- Product Traceability
- Product Rotation



Eastern and Western Warehouses

- Providing National Distribution Coverage

Customs Clearance

- Importer of Record
- Regulatory Compliance
- CUSMA Compliance
- Licensed Importer

Purchase Product at any FOB Point

- Currency Exchange Management
- Buy / Sell Service

Warehousing

- East / West
- Dry / Frozen

Customer Service

- Order Management
- Invoicing
- Collections
- GS1 / E-commerce Management

Customer Delivery

- Customer Warehouse Delivery
- Direct Store Delivery (DSD)
- Food Service

Reporting

- In Market Sales
- Product Replenishment
- Trade Fund Management

Arrange the Importation of Product

- Ocean Container
- Truck Loads TL / LTL
- Rail
- Air Freight

Product Repacking

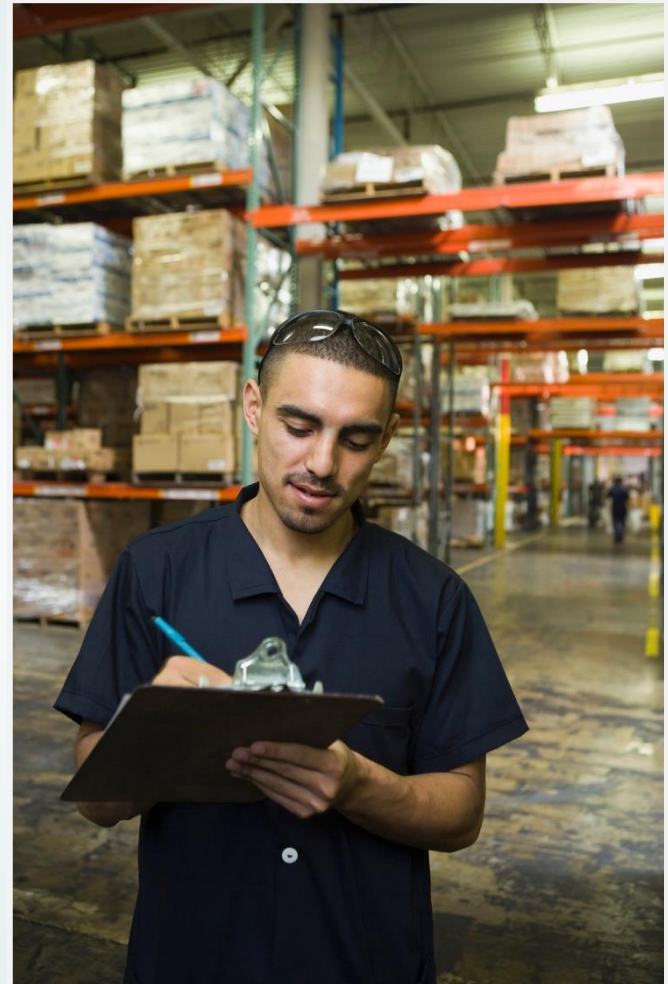
- Club Packs
- Promotional Displays

Label Development

- Translation Services
- CFIA Compliance
- Design
- Nutritional Analysis



- ✓ Carrier Delivery Status
- ✓ On-Time Shipment Exception
- ✓ Inventory Status
- ✓ Inventory Issues
- ✓ Inventory Week's Coverage
- ✓ Inventory Accuracy and Adjustments
- ✓ Truckload / Container Utilization - Freight In / Out & Transfers
- ✓ Warehouse and Carrier Performance
- ✓ Customer Issues
- ✓ Inter Warehouse Transfers
- ✓ KPI's



VENDOR FILL RATE RANKINGS

Week 42



FRESH FOOD	
Ferme J Ouimet Inc	100%
Weston Bakery	100%
No Nuts Baking Co.	100%
Keybrand Foods Inc.	100%
Gouw Quality Onions Ltd.	100%
Summer Fresh Salads	100%
Bright Cheese House	100%
Fiera Foods Inc.	100%
Bertagni	100%
Castle Rock Vineyards	100%

GROCERY	
Champion Ice Cream	100%
Emira Pet Products	100%
Leahy Orchards Inc.	100%
Trans Herbe Inc.	100%
C B Powell Ltd.	100%
Grain Millers Canada Corp.	100%
Sparks Farm Egg Supplies	100%
North Oufs Inc.	100%
Sky Blue Water Inc.	100%
Prairie West Ice Cream Inc.	100%

GENERAL MERCHANDISE	
Always Home Properties Ltd.	100%
Bernardin of Canada Ltd.	100%
K + S Windsor Salt Ltd.	100%
Goodtimes Brand Inc.	100%
Quality Home Products	100%
Handi Foil Corp	100%
Luxware Enterprise Co.	100%
Entertainment One Non-SBT	100%
Qingdao Kingking A C Co. Ltd	100%
Hisense Canada Co. Ltd.	100%



CB Powell

Case Fill
= **98.6%**

On-Time Delivery
= **97.6%**

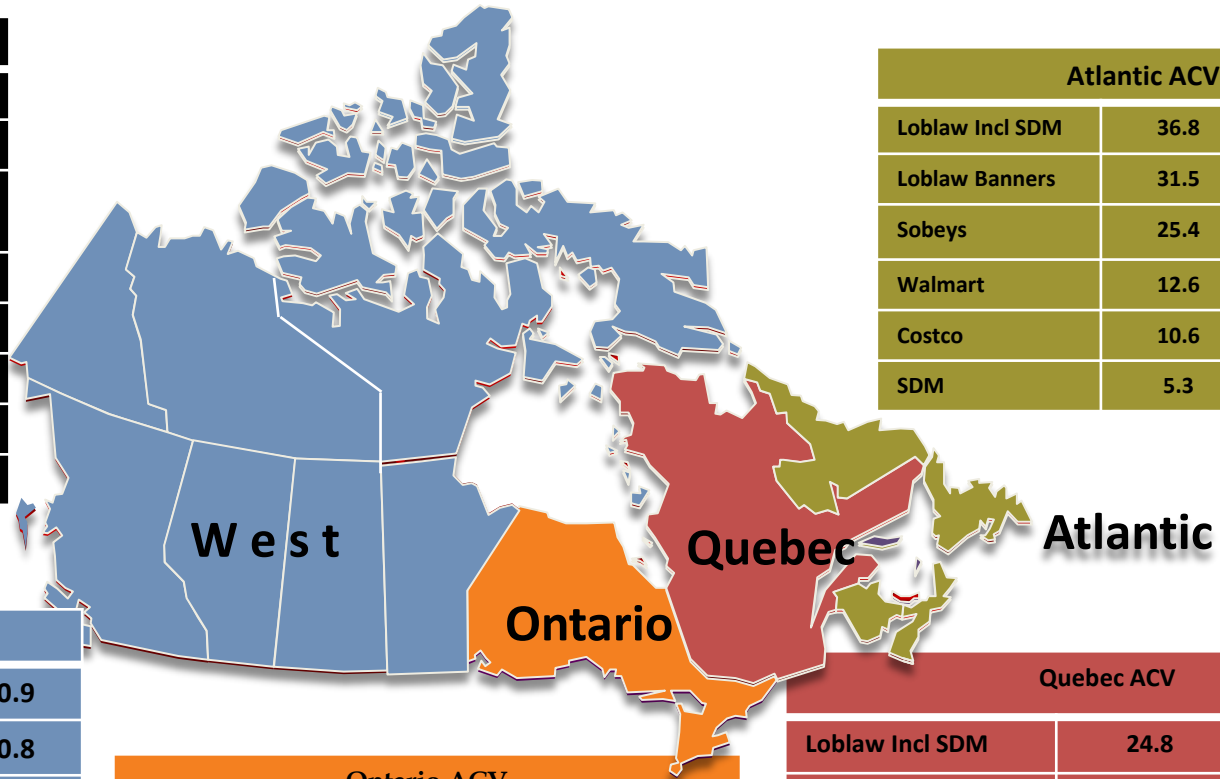
CBP is VoR at over 90% ACV within the Canadian Grocery Channel





Canadian Retail Overview

Canadian Retail Trade



National ACV		
Loblaw Incl SDM	33.0	0.8
Loblaw National	28.7	0.7
Sobeys including Safeway	14.1	0.3
Costco	12.8	-0.4
Walmart	12.0	-0.6
Metro	10.9	+0.1
Save On Foods	3.1	+0.2
Federated Co-op	1.5	-0.1

Atlantic ACV		
Loblaw Incl SDM	36.8	+4.6
Loblaw Banners	31.5	+4.7
Sobeys	25.4	-1.1
Walmart	12.6	-0.7
Costco	10.6	-1.4
SDM	5.3	-0.1

West ACV		
Loblaw Incl SDM	30.1	+0.9
Loblaw Banners	26.4	+0.8
Costco	14.4	+0.0
Sobeys Incl Safeway	13.7	+0.4
Walmart	13.1	-0.9
Save On Foods	9.7	+0.4
Federated Co-op	4.6	-0.5
SDM	3.8	+0.1

Ontario ACV		
Loblaw Incl SDM	40.4	+0.2
Loblaw Banners	34.3	+0.3
Walmart	13.4	-0.6
Metro	12.5	+0.2
Costco	12.1	-0.4
Sobeys	9.1	+0.6
SDM	6.1	-0.1

Quebec ACV		
Loblaw Incl SDM	24.8	+0.3
Loblaw Banners	22.9	+0.2
Metro	20.7	+0.5
Sobeys	19.4	-0.2
Costco	12.3	-0.6
Walmart	8.4	-0.2
SDM	1.9	+0.1

Key Account Profile: Loblaw Company Ltd.

- LCL: Largest Grocery retailer in Canada with 33% share and 1,006 stores Nationally
- 24 banners Nationally covering complete spectrum of grocery retail: Superstores, conventional supermarkets, discount units, convenience and club stores.
- Strategic advantage vs competitors with the success of private label brands – “*President’s Choice*”, “*No Name*”, “*Blue Menu*” – over 5,200 P/L products.
- Investment of \$700MM in store improvements in the last 2 years at 200 retail units – increase floor space, for produce, seafood and meals to go.
- With the Asian population growth (est. 5 Million Canadians), - success with acquisition of T&T Supermarkets – 23 stores primarily in BC and Ontario.
- Additional presence in Drug through ownership of Shoppers Drug Mart (1,255 stores)
- National Listing Fee Ask: Substantial, but negotiable by category & solid ROI opportunity.



Key Account Profile: Sobeys Inc.

- #2 Retailer behind LCL, with 14.1% share and 1,836 locations across Canada (incl C-Store)
- Sobeys undergoing a reorg (Project Sunrise) – harmonization of business moving from Regional to National approach.
- \$5.8B deal to acquire Canada Safeway giving Sobeys huge presence in Western Canada with purchase of 213 retail grocery outlets
- Operations include both traditional supermarket (Sobeys, Safeway, IGA (Quebec only) and discount grocery through their Freshco banner – direct competitor with No Frills.
- Announced plans to roll the Freshco banner to Western Canada – converting 60 underperforming Sobeys and Safeway stores.
- Key Private Label Brand: “*Compliments*” anchor brand as a direct competitor to LCL
- As of 2021 – No Listing Fee, replaced with a CBP VoR 0.97% of net sales on all items sold to Sobeys



Key Account Profile: Costco Wholesale

- Canada: Costco's biggest market outside US, currently holds 12.8 share with 100 warehouses
- Key Grocery P/L Brands: Kirkland and Kirkland Signature
- Focus on offering quality wellness items as point of difference.
- Two divisions in Canada that operate independently from each other: Western Canadian Division located in Vancouver and Eastern Canadian Division located in Ottawa
- Relies on sampling of food items to generate food sales – focus purchasers on specific and unique products.
- Additional focus through Business Centre model – 80% of Bus Centre items are distinct from other Costco locations
- No listing fees required however unique club formats with best cost is required



Key Account Profile: Walmart Canada Inc.

- Canada's largest Mass Merchandiser holding 12.0% share with 410 stores
- For the past 10 years Walmart has focussed on rolling out the Supercentre concept, helping bolster their retail grocery sales (300+ stores)
- Growth in grocery to continue through improving supply chain and marketing to enhance fresh food credibility – focus to win the weekly consumer stock-up trip.
- Also big bets on becoming online grocery leader (biggest competition to Amazon).
- Announced they will be testing grocery home delivery and pick-up services in the Toronto
- Continue to pressure suppliers for lower prices through EDLP programs and Roll-backs
- Private Label : *Great Value* expanding into *Great Value Organic* and *Your Fresh Market*
- No listing fee requirement for Walmart Canada



Key Account Profile: Metro Inc.

- Metro accounts for 10.9% of all retail grocery sales; operates in Ontario and Quebec only
- Grocery banner is “Metro” but operate discount banners : Food Basics & Super C
- Store Counts: Metro (365), Food Basics (119) and Super C (72)
- Private label brands:
 - *Irresistible and Selection*: over 2500 products. “Delivers great value – national-brand quality at affordable prices”.
- Pharmacy stores: Brunet, The Pharmacy and Drug Basics
- Nov 2017: announced will purchase Quebec Pharmacy chain Jean Coutu for \$4.5B, making it the 2nd largest pharmacy operator in Quebec. (SDM/Pharmaprix #1)
- Listing fee requirement is 1% of net sales on all items sold to Metro



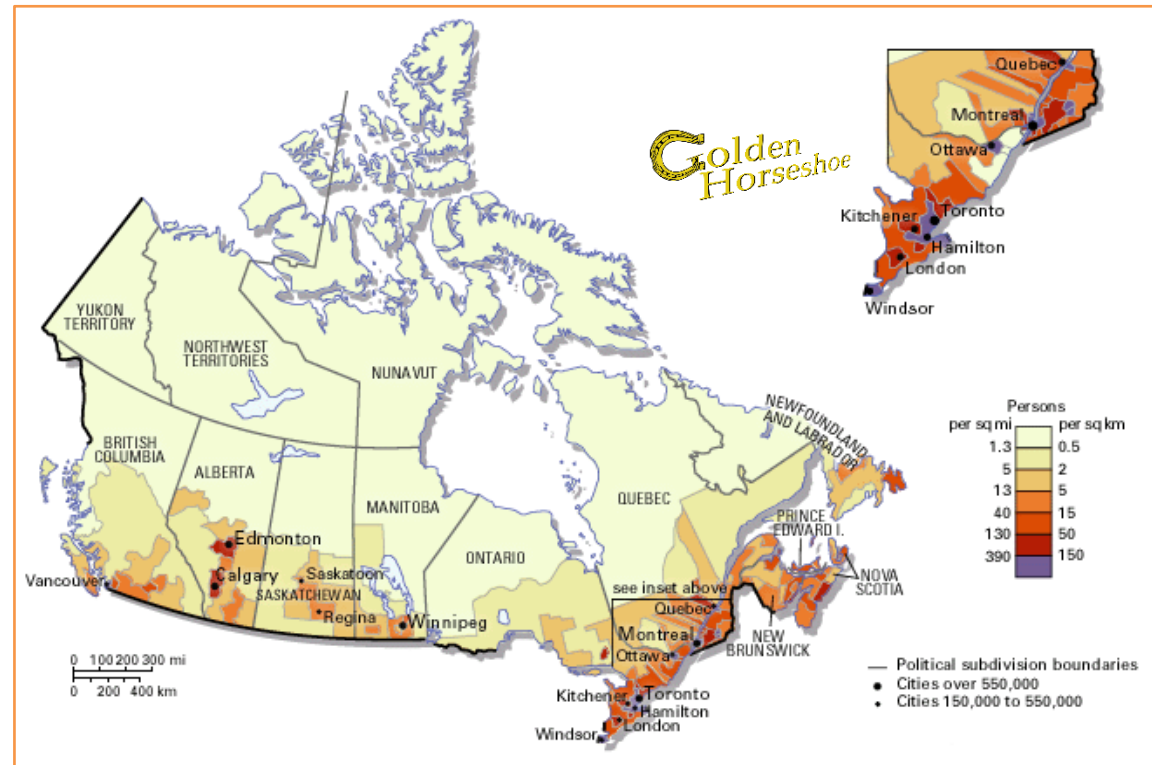
Key Account Profile: Save On Foods

- Largest Western-based food store chain, accounting for 3.1% share Nationally and 9.8% share in Western Canada operating in 180 locations
- Save on Foods also services Georgia Main (30 stores) and Calgary Co-op (23 stores)
- Owned by Jim Pattison Group (sales of \$7.1B and 33,000 employees)
- Variety of Food Retailing and Wholesaling interests exclusively in Western Canada
- Banners: Save on foods (Primary Supermarket Banner), Overwaitea (smaller town in BC), PriceSmart Foods (ethnic focus), Urban Fare (urban high-end/upmarket), Bulkley Valley Wholesale (grocery and food service, Northwest BC).
- Listing Fee Ask: 1% of net sales on all items sold to SoF + Case FREE FILL per location



Canadian Shopper Profile

- Aging Population: 40% of pop is 45+
 - Expected to be 48% by 2026
- Household Size – 3 people per household (was 4 in 1970)
 - Greater number of single person HH than ever before.
- Working Women with children under 16: 73% (+34% since 1976)
 - Women however still remain primary decision makers in grocery purchases.
- Ethnic Diversity – has helped to boost overall population. Chinese, Filipino, and South Asia are largest ethnic groups.
 - Statistics Canada: by 2031, ethnic shoppers will represent 31% of Canadian Consumers.
 - AC Nielsen – this segment is worth C\$5B in grocery sales.



- Largest Population density occurs in urban centres within a short drive of the Canada/US border
- Highest density in “The Golden Horseshoe” – Southern Ontario surrounding the Western end of Lake Ontario
- Toronto/Hamilton/London/Windsor –large urban centres