Brexit
Retailer Perspective

Sharon Buckley

Musgrave

Our business





SuperValu

MUSGRAVE MarketPlace

Centra

Dialsur
TU CASH & CARRY

Daybreak

LA ROUSSE FOODS

MACE

FRANK AND HONEST
GOURMET COFFEE COMPANY

DONNYBROOK FAIR

Dialprix

CHIPMONGERS
FOR CHIP LOVERS

Musgrave

Growing *Good* Business



Musgrave

We feed 1 in 3 people across the island of Ireland every day



Musgrave Brexit priority

Minimise the impacts of Brexit on shoppers, support our retailers and foodservice partners and protect our joint business with suppliers

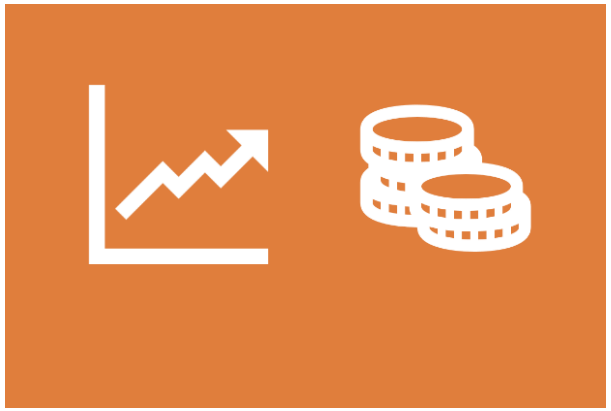
Musgrave approach



3 objectives underpin our approach

- maintain full availability
- no disruption to the offer
- minimise price inflation to the consumer

Impact of Brexit on Musgrave



Tariffs & Non Tariff Costs

Potential inflationary impact particularly for UK sourced



Supply Chain Efficiency

Brexit will drive inefficiency and cost into supply chains



Maintaining Consumer Choice

Brexit driven costs, operational inefficiencies and divergence will make some products unviable

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Tariff and non-tariff costs



- Re-source away from the UK
- Find ways to take costs out of the end-to-end supply chain

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Tariff impacts

Pre Brexit

€2.99



Post Brexit

€3.32

Tariff and non-tariff costs

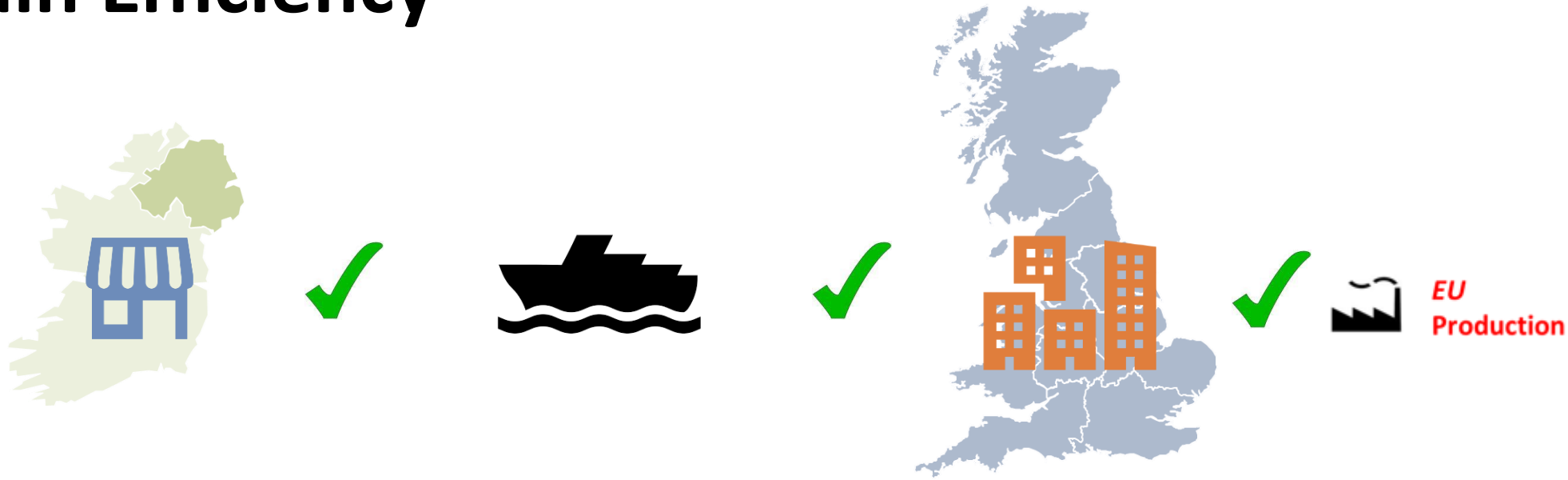


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Supply Chain Efficiency

Current efficient model

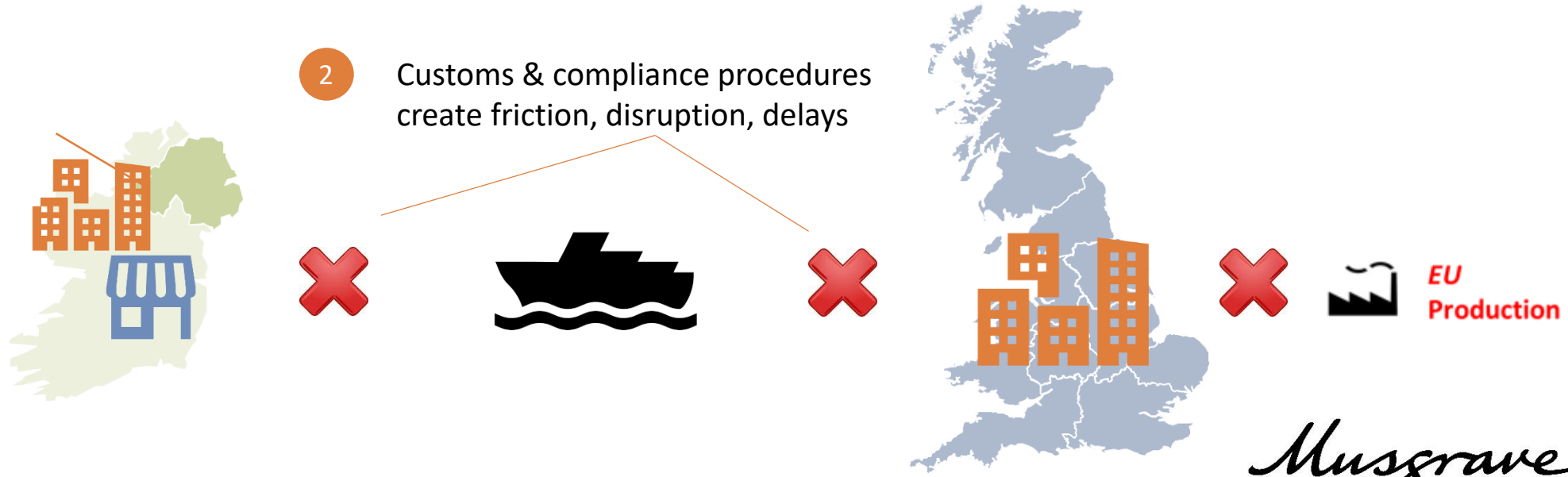


1. Suppliers and/or Musgrave need to hold stock locally

Increased lead times

Less efficient future model

2. Customs & compliance procedures create friction, disruption, delays



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Musgrave foodservice supply chain

All island supply model



- Lack of clarity on Irish border
- Prepare for the worst case scenario
- Minimise disruption and cost
- Brexit ready

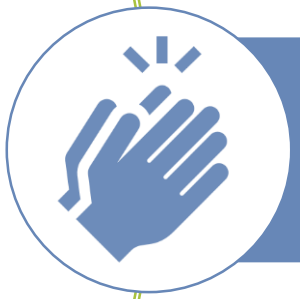
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Maintaining Consumer Choice

The Irish Consumer



•Diverging laws on labelling and food standards



•Potential reduction in branded NPD launches in Ireland

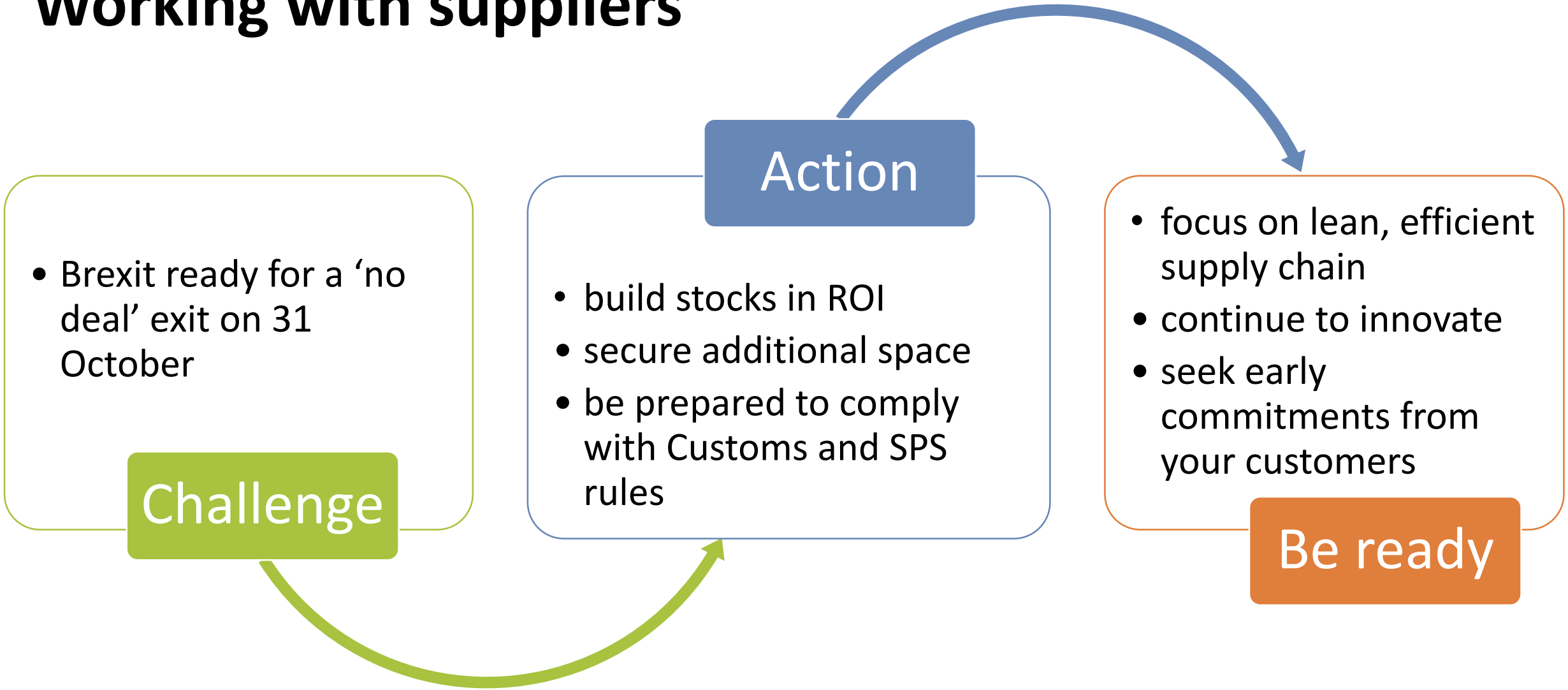


•Delays and disruption impact choice and freshness

Opportunity for Irish suppliers

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Working with suppliers



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A positive future…….



Quality Fresh & Local Food



Health & Sustainability



Convenience

Musgrave

Musgrave