

# SYSCO-US FOODS MERGER

navigating a new foodservice supply chain

The Sysco and US Foods merger promises to impart long term change to the foodservice supply chain. Restaurant operators will be at the center of these changes as the distribution channel looks to drive efficiencies while increasing culinary innovation and strengthening their value proposition. To help guide you through these interesting times, The Hale Group and Datassential have teamed to develop a series of reports and strategic analyses regarding the impending merger. This series of three reports is focused on how the merger will impact operators' purchase decisions... who do they buy from, what do they buy and why do they buy.

These reports leverage The Hale Group's unique and in-depth knowledge of the foodservice supply chain, including their foundational report, Foodservice 2020, and Datassential's deep understanding of operator behavior fueled by thousands of proprietary studies and the industry's largest foodservice operator panel.

The initial **Situation Analysis** and second **Category Details** reports are priced together at \$12,000 for both. The optional third **Lasting Impacts** report is priced at \$5,500. A complete package of all three reports, giving you a detailed and comprehensive look at the merger's impact, is available for a bundled price of \$14,500.

## 3 waves of insights

### SITUATION ANALYSIS

May 2014      500 operators

**SHIFT.** How will operators alter their sourcing behavior?

**PROFILE.** Which operators will be impacted most? Segments, sizes, GPOs, and more.

**FACTORS.** Which attributes matter most in source selection, and how are those perceived to be impacted?

**FLOW.** To what extent do operators plan to consolidate with the new company versus spreading purchases out further?

### CATEGORY DETAILS

Sep 2014      1,000 operators

**PRODUCTS.** Which categories are most impacted, and how so?

**LOYALTY.** In which categories will operators be most loyal, and what will be their propensity to switch under various scenarios?

**BRANDS.** How will the role of distributor brands and national brands evolve?

**CATEGORY MGT.** What can companies do to promote category leadership as brand dynamics change?

### LASTING IMPACTS

May 2015      500 operators

**CHANGES.** To what extent has purchasing behavior shifted following the merger?

**CONSEQUENCES.** How well are operators working with the new combined entity? What are their experiences – what's been good, and where do they want to see improvement?

**OPPORTUNITIES.** How could go-to-market strategies and trade investment change? What other adjustments should be made?

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