



## **Submission title**

Cruga Biltong: Authentically African

## **Client company**

Meatsnacks Group

## **Submission date**

November 2018

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DBA DESIGN EFFECTIVENESS AWARDS 2019

**Pearlfisher.**

# EXECUTIVE SUMMARY

Pearlfisher needed to deliver an inspiring strategic and creative direction for Cruga Biltong that solidified the brand's premium position in order to dominate UK competitors. The new "Authentically African" positioning brings a true appreciation of meat boldly to the fore, and the design captures the artisanal, expert process of making biltong.

Despite a raft of new competitors that entered the market since the redesign, Cruga Biltong has achieved outstanding results against its objectives – and has almost single-handedly driven category growth.

- 🎯 **Number 1 biltong in the UK**
- ⬆️ **+22% growth to gain a massive 40.2% market share**
- 🕒 **+161% value sales growth smashes objective**
- 📦 **+173% volume sales growth also blasts objective**
- 👁️ **+74% increase in total distribution points**
- 🎯 **+55% uplift in weighted value rate of sale**

With little in the way of marketing budget or resource, and with all other influencing factors either non-existent or insignificant, we're absolutely confident that Cruga's incredible growth rests solely on the redesign.



# CASE STUDY OVERVIEW

The Meatsnacks Group is the UK's leading producer and distributor of biltong and jerky, and a major proponent of the emergent popularity of meat products as a healthy and sustaining snack.

Having risen to market dominance through acquisitions, the group's portfolio of brands had become fragmented, lacked cohesion, and risked cannibalisation. Plus the group faced the threat that fast-growing competitors based outside the UK might enter this market.

Meatsnacks Group first charged Pearlfisher to unite the entire portfolio around a powerful brand architecture strategy, to bring its brands in line with contemporary consumer needs whilst remaining true to the group's entrepreneurial core. Then Pearlfisher began a portfolio-wide visual overhaul based on that strategy. This kicked off with the rebrand of Cruga Biltong, one of the group's most successful brands and the number three biltong in the UK.

With little in the way of marketing budget or resource, Pearlfisher needed to deliver an inspiring creative direction for Cruga Biltong that solidified the brand's premium position to:

- 🎯 **Dominate competitors**
- ⬆️ **Grow market share, value sales, volume sales and weighted value rate of sale**
- 🚫 **Increase total distribution and get listings from one additional big four supermarket**



# DESCRIPTION

## Biltong

Cruga Biltong's recipe has authentic South African roots.

Biltong has a unique, sophisticated taste – it's the red wine of the dried meat world. Because it air-dries slowly at a consistent temperature, the flavour is natural yet potent. Whether seasoned or in its purest form, biltong is an experience unmatched by any other dried meat product. It's all about the highest appreciation of pure meat.

## Target audience and needs

Given biltong's particular process and taste, Cruga wanted to reach consumers that were after an alternative snacking experience, people who wanted healthier, authentic, contemporary, moreish tastes with a modern twist. Great adult flavours with a high emotional reward and inspiring snack time – savoury, guilt-free indulgence.

## Portfolio brand architecture strategy

Following a comprehensive category audit, informed by a deep-dive exploration into the future landscape of food, Pearlfisher mapped The Meatsnacks Group's portfolio on a spectrum from 'authentic' to 'adventurous'. This gave the portfolio the flexibility to remain rooted in tradition whilst embracing exciting future propositions.

## Cruga Biltong rebrand: Authentically African

At the farthest and most 'authentic' end of the portfolio spectrum is Cruga Biltong. Firmly rooted in a South African recipe and legacy, Cruga's original visual expression leaned heavily on stereotypical motifs. Though effective in communicating heritage, this also put the brand in danger of appearing contrived – and ultimately inauthentic.



# DESCRIPTION

Pearlfisher's premium positioning for Cruga brings a true appreciation of meat more boldly to the fore. A design essence of 'Slow Perfection' captures the artisanal, expert process of making biltong whilst informing an honest and rustic direction for design.

Colour and texture evolve the brand's message and aesthetic from 'African tribe' to 'African tactility'. Crucial visual equities such as the landscape and shield shape remain, but are injected with contemporary energy and a distinctly crafted appeal. The new, ownable logotype can be boldly activated in communications. Tribal patterns signal flavour instead of evoking a one-dimensional and stereotypical feeling of 'Africa' as they did before. For example, triangles take on a more of a chilli shape for that variant.



Before



After



# OVERVIEW OF MARKET

There's no denying that meat snacks is a growing category, driven by market trends including:

- 🎯 **The move towards more exotic and healthier choices**
- ⬆️ **Growing unisex product appeal and innovation targeting women**
- 🚫 **Desire for gluten free and increased protein intake**

Competitive pressure in the UK biltong market increased significantly at the time of Cruga's relaunch:

- 👁️ **Jack Links Biltong and Ember Biltong came to market midway through the post period**
- 📦 **Reds went on shelf in Asda towards the end of the re-launch period**
- 🎯 **Competitive pressure continued with new biltong offerings from Own Label (Co-op, Tesco)**
- ⬆️ **Kings extended their range with Wagyu Biltong**

In the 28 weeks post-relaunch versus 28 weeks pre-relaunch the entire UK biltong market grew by 18% in sales value, but this was driven almost entirely by Cruga Biltong, with many competitors actually losing market share, as indicated by the following market share data for key UK players:



<b>BRANDS</b>	<b>PRE-RELAUNCH</b> 28 weeks December 2017	<b>PRE-RELAUNCH</b> 28 weeks December 2017
<b>CRUGA</b>	<b>18.4%</b>	<b>40.2%</b>
<b>KINGS</b>	<b>22.2%</b>	<b>22.4%</b>
<b>OWN LABEL</b>	<b>19.5%</b>	<b>18.9%</b>
<b>COAN</b>	<b>6.2%</b>	<b>5.3%</b>
<b>UNEARTHED</b>	<b>4.4%</b>	<b>3.7%</b>
<b>JACK LINKS</b>	<b>n/a</b>	<b>2.5%</b>
<b>EMBER</b>	<b>n/a</b>	<b>3.6%</b>
<b>REDS</b>	<b>n/a</b>	<b>0.3%</b>

**Project launch date:** January 2018

**Design fees:** Redacted confidential data

# RESULTS

In the 28 weeks since its relaunch, Cruga has performed brilliantly against its objectives and the previous 28 weeks. Not only this, but the brand is almost single-handedly driving category growth. The following results are that much more impressive given there was little in the way of marketing spend beyond the brand design – and the fact that a raft of new competitors entered the market.

## **Number 1 biltong in the UK**

Cruga shifted from number 3 to number 1 based on sales value. What better sign of dominating competitors than this?

## **Massive 40.2% market share: +22% growth and +12% versus target**

As shown in the Market Overview, Cruga has almost single-handedly driven category growth since the redesign. Cruga's sales value share of the biltong market grew from 18.4% to 40.2%, whilst most competitor market shares fell or remained stagnant. This 22% growth is also +12% more than the 10% objective.



### **+161% value sales growth smashes +60% objective**

An unbelievable increase in (*redacted confidential data*) value sales of +161%! This increase completely smashes the +60% objective by more than 2.5 times.

### **+173% volume sales growth also blasts +60% objective**

Cruga increased unit sales by an incremental (*Redacted confidential data*) packs – +173% growth almost trebles the +60% objective.

### **+74% increase in total distribution points in the market: +44% versus objective**

Distribution points grew (*Redacted confidential data*). This 74% increase is way beyond all expectations versus the +30% objective.

### **Asda distribution based on new branding**

Achieving their goal for distribution at another top 4 supermarket, Asda buyers said that one of the main reasons they selected Cruga was due to the new branding.

### **+55% uplift in weighted value rate of sale**

This increase from  $x^*$  to  $x^*$  ( $x^*$  *redacted confidential data*) more than doubled the 25% goal.



# OTHER INFLUENCING FACTORS

The following influencing factors are either non-existent or insignificant, so we're absolutely confident that Cruga's incredible growth rests solely on the redesign.

## **Was it the recipe?**

No, the recipe didn't change.

## **Was it additional marketing spend?**

There was no additional marketing beyond the only in-house marketing person conducting some PR and social media – and the content of those communications was all about sharing the new design.

## **Was it the sales team or price changes?**

No changes to the sales team or prices.

## **Was it trade shows?**

In October 2017, prior to the relaunch, Cruga Biltong has a presence at the Anuga trade show in Cologne as part of the Scotland Food & Drink stand. It's highly unlikely that this had an impact on the UK result post-redesign.

## **Was it sales promotions or in-store merchandising?**

There were no sales promotions and no changes to in-store merchandising.

## **Was it market growth?**

It's true that the UK market grew by 18%, but as previously demonstrated, this growth is almost entirely due to Cruga in the 28 weeks post-redesign.

*Research/data sources*

*Meatsnacks group internal data*

*Jerky and Biltong Consumer Portrait December 2016*

*IRI: 28 weeks ending 31/12/17 (prior period)*

*versus 28 week ending 15/7/18 (post period)*

*IRI: Asda sales MAT To 16/07/17 to MAT To 15/07/18*