

THE INGREDIENTS *of success*

How a fresh dough brand
regained strength at
home and beyond



CLIENT **DANEROLLES**

INDUSTRY SECTOR **FOOD**

DESIGN CONSULTANCY **DESIGN BRIDGE**

SUBMISSION DATE **OCTOBER 2019**

DesignBridgeTM

FOR PUBLICATION

KEY RESULTS

- [xx%- redacted]
Sales volume in BENELUX,
MORE THAN DOUBLE
the original goal (Sept 2019 YTD)
- Brand expansion to
3 NEW MARKETS
in 2018/2019 with 3 additional markets in progress for 2020
- [xx%- redacted]
Sales volume in THE NORDICS,
MORE THAN TRIPLE
the original goal (Sept 2019 YTD)
- **DOUBLED**
DISTRUBUTION
of niche SKUs (3) at Dutch retailers
(from 35%- 75% store penetration) in 2017-2018
- **ALL TIME HIGH**
BRAND AWARENESS
in the Netherlands (10% increase)
- **5,3% INCREASE**
IN MAT (MOVING ANNUAL TOTAL)
value market share 2019 YTD vs. 2016 in the Netherlands
- **COMPLAINTS**
about purchasing the wrong product went from 5% in 2016 to **<1%**
in 2019

BEFORE



AFTER

“

With this progressive redesign by Design Bridge we have managed to turn the tide and grow structurally again. The cans are again noticeable and relevant for consumers, not only in our home markets but now also in new markets. The redesign allowed us to shift from a croissant brand to a brand offering several meal solutions for the weekend and differentiating us even more from private labels.”

**Piet Decuyper, CEO,
Danerolles BV.**

EXECUTIVE SUMMARY

In 2016, Danerolles was a beloved but outdated fresh dough brand, struggling to maintain share and relevance amidst copy-cat private label competitors and the allure of the in-store bakery. Previously owned by Danone, the brand was sold to a private investor in 2012 and now operates in the BENELUX, Finland and Denmark markets. In Danerolles' home and largest market, the Netherlands, the fresh dough market had been stagnant for 15 years. The sub-segment “fresh dough for croissants” started to decline from 2012 by 5% volume each year and, due to market share dominance, Danerolles was losing substantial sales.

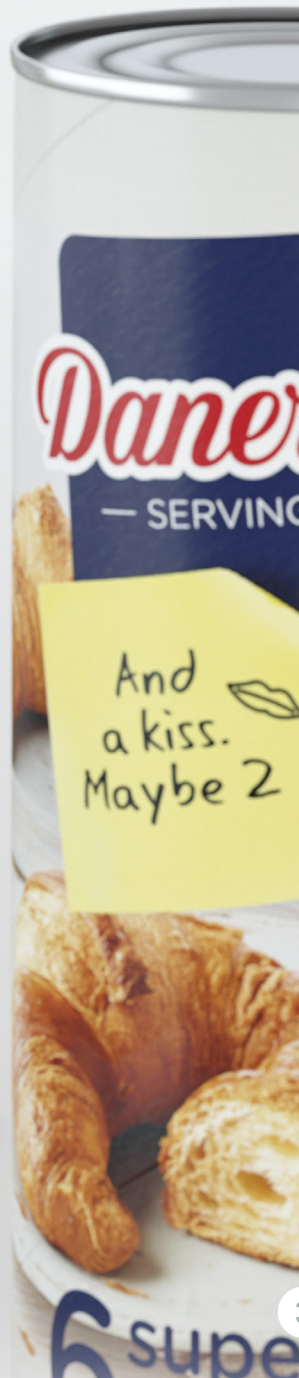
Danerolles looked generic and cold and was easily missed on the refrigerator shelf. There was little awareness of the range of products beyond croissants. We were briefed to redesign Danerolles with the goal of stabilising market share, seeing volume turnaround and driving new distribution through export.

The new design was a bold step. A revamped identity drives 360° impact and the new colours and unique product illustrations make range navigation easy. Results have been bold too, helping Danerolles and the category to bounce back and opening doors to wider distribution.

Brand awareness is at an all-time high, Danerolles is growing value market share year on year, has doubled distribution of niche SKUs, and has expanded to 3 new markets with 3 more in progress. Annual volume growth targets of [xx% - redacted] have been far exceeded with [xx% - redacted] 2019 YTD volume growth in BENELUX, without extra marketing spend.



(Previous Design)



BACKGROUND & MARKET CONTEXT

Danerolles canned fresh dough launched in BENELUX markets in **1974** when traditional bakery dough wasn't accessible to consumers. Thanks to this new product **innovation**, making freshly baked bread and croissants at home became a novel **luxury**.

Over time, however, the growth of in-store bakeries meant people were presented with a more convenient option as soon as they walked into the store: the sight and smell of fresh bread, right away. The novelty of baking at home began to wear off. For 15 years, the dough category lost volume and flattened until, by 2012, it was declining by 5% year on year in Danerolles' largest market, The Netherlands.

At the same time, private labels had crowded the market with similar French-inspired red, white and blue coloured packs. Danerolles lost market share, dropping from a previous high of [xx% - redacted] value market share in 2014 to [xx% - redacted] share in 2016 in the Netherlands, a 11% drop.

Danerolles looked dated and had weak shelf presence. Brand awareness was waning, and consumers were only aware of their croissants, even though they had 3 other products available. Without much differentiation between SKUs, people often bought the wrong product, mistaking white bread for croissants and resulting in consumer complaints.

Brand perception needed improvement as well. Consumers stated they did not see Danerolles as an innovative brand according to previous packaging research. Furthermore, they only saw Danerolles as a brand for occasional use.

BUT DANEROLLES KNEW THERE WAS SOMETHING **SATISFYING** AND **MAGICAL** ABOUT A HOME FILLED WITH THE AROMA OF **FRESHLY BAKED BREAD OR CROISSANTS...**

a nostalgic, sensorial experience that triggers shared moments. With bread being a daily staple in Europe, Danerolles needed a design revolution that tapped into this universal truth that goes across homes and borders.

OUTLINE OF PROJECT BRIEF

DANEROLLES NEEDED *A bold look & feel* THAT WOULD HELP IT RISE FROM DECLINE *AND become the* *leader* OF THE FRESH DOUGH CATEGORY.

Our challenge was to develop a revolutionary and impactful design, enhance quality perceptions, improve navigation within the range and bring to life the brand values and strategy. The open fridge in the supermarket – where Danerolles can be found – is functional, cold and distant and far from the emotional aspiration of the brand. It is also difficult to stand out if the retailer takes on just 2 variants of the range.

The previous platform “Serving Love” was too generic and only focused on the serving moment rather than the whole product experience. Danerolles wanted to inspire ‘DOUGH CREATIVITY’, encouraging people to **CREATE, IMPRESS AND ENJOY** whenever they wanted. The new design needed to bring to life this new brand platform.

Unique and recognisable brand elements had to be developed. The wordmark was friendly and approachable but was not consistently used. The red, white and blue colours met category codes, but lacked ownability and did little to help the brand stand out at shelf. The brand also lacked any sort of photographic or illustrative style – everything felt cold and staged, lacking quality and taste appeal.

There were also technical challenges related to print and production mandatories. The very specific diagonal die-cut, the single cut production, the rotogravure printing technique and the metallic base material (necessary to keep the dough fresh) meant photography details often became pale and not well defined.

KEY FACTS

LAUNCH DATE: 2017

CLIENT BUDGET: €54,600

LAUNCH MARKETS: NL, Belgium, Denmark, Finland and Sweden



Scope of work:

- Brand & corporate identity
- Packaging redesign for 6 SKUs
- Brand guidelines for online and offline channels

Danerolles' business objectives were to:

- Grow by [xx% - redacted] sales volume in Netherlands, Belgium, Denmark, Finland, Sweden.
- Stabilise market share drop in the Netherlands by stopping decline and maintaining 50% share at minimum.
- Improve navigation at shelf (reduce incorrect product purchases) and overall awareness of the full range, increasing distribution of 3 of the smallest niche SKUs from 35% to a minimum of 50% store penetration.
- Reduce dependence on the Netherlands by extending into at least 3 new markets (between Baltics, Poland, Russia, Eastern Europe), experiencing positive growth in 2018-2019.

Their brand challenges were to:

- Create a distinctive, ownable visual identity to stand Danerolles apart from private labels and bring to life the new brand strategy.
- Emphasise the creativity of baking with fresh dough at home - beyond breakfast.



DESCRIPTION OF DESIGN SOLUTION

THE DESIGN SOLUTION
ALLOWED THE BRAND
TO *flex existing
assets* AND
INTRODUCED NEW
ASSETS TO DIFFERENTIATE
AND *stand apart*
FROM PRIVATE LABEL AND
OTHER COMPETITORS

NEW BRAND IDEA

We introduced a new brand idea - “**Ingredients
for a delicious life**” which more closely
aligned with the brand’s sociability and
enthusiasm for food enjoyment.



DESCRIPTION OF DESIGN SOLUTION CONTINUED

REVAMPED WORDMARK

To aid shelf recognition, a new diagonal wordmark was designed, inspired by Danerolles' most distinctive asset - the unique twisting, unfurling experience of opening the pack.

The old, static wordmark was updated with small details to give a more continuous, unrolling dough like feeling. And, it wraps around the cylinder, providing 360-degree brand visibility, regardless of placement on shelf.





make-your-own
CROISSANTS
PARTY MINI'S

FRESH DOUGH
--SINCE 1974--

Danerolles

make-your-own
CROISSANTS
EXTRA

EXTRA
WHITE

Danerolles

make-your-own
6x CROISSANTS
CLASSIC

FRESH DOUGH
--SINCE 1974--

Danerolles

make-your-own
4x CROISSANTS
LACTOSE FREE

FRESH DOUGH
--SINCE 1974--

A BOLD COLOUR PALETTE

Bold colours stand out in the cold refrigerator, bringing warm, nostalgic cues and improving shelf power and navigation. A unique colour for each variant improves visibility of the entire range, drawing attention to SKUs that were easily missed before. Colours were chosen to trigger familiar category codes, for example, purple for chocolate and white for lactose-free croissants.



CUSTOM ILLUSTRATIONS

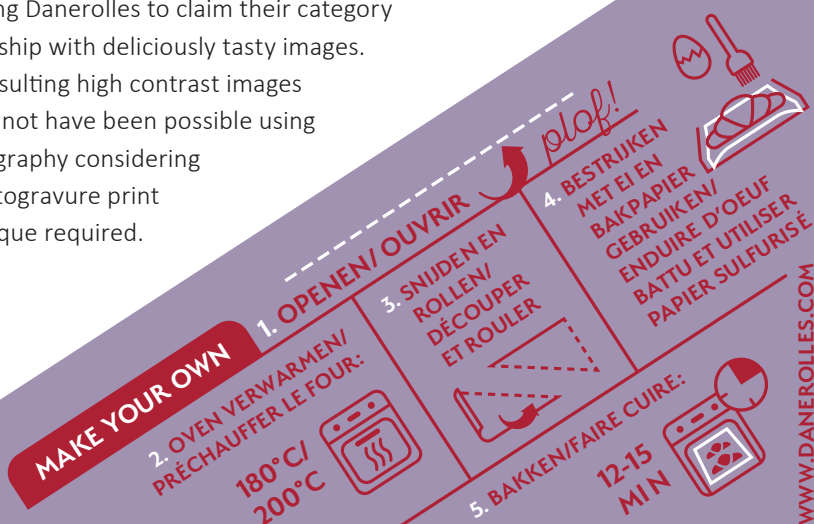
Custom illustrations were created by Elena Bulay to emphasise the down-to-earth authenticity of the products. Sweet and savoury ingredients alongside the product inspire creativity and plant the idea that anyone can put their own spin on freshly baked bread.

The hand drawn illustration style is unique and ownable, allowing Danerolles to claim their category leadership with deliciously tasty images.

The resulting high contrast images would not have been possible using photography considering the rotogravure print technique required.

SIMPLE ICONOGRAPHY

Easy to understand iconography provides **step-by-step baking instructions** without text, avoiding the proliferation of languages needed in new markets.





RESULTS

The redesign far exceeded the original objectives and helped meet the overall business challenges. Not only have sales increased, but the brand is expanding into new markets and has been able to successfully launch new products.

OBJECTIVE: GROW VOLUME by [xx% - redacted] IN NETHERLANDS, BELGIUM, DENMARK, FINLAND & SWEDEN

The brand has experienced [xx% - redacted] YTD volume growth in BENELUX and [xx% - redacted] in the Nordics, more than double and triple the original growth goals respectively.

OBJECTIVE: IMPROVE NAVIGATION AT SHELF AND AWARENESS OF THE FULL RANGE

The colour-coded SKUs were now more visible, and clearer to consumers. Before launch, in 2016, 5% of all complaints came from incorrect product purchases and today that figure is less than 1%.

Not only were people now buying the right product, but they also were discovering new ones. Following the redesign, sales of previously niche SKUs began to increase. People were now able to see the full range of products in the Danerolles portfolio, and they were buying more than just croissants. This impressive growth and shelf presence helped Danerolles regain retailer trust which allowed massive distribution gains for 3 previously niche SKUs at Netherlands retailers, from 35% to 75% store penetration in 2017-2018.

OBJECTIVE: REGAIN SHARE FROM PRIVATE LABEL BRANDS & STABILISE MARKET SHARE IN NETHERLANDS

The bold new identity has helped the brand stand apart from private label offerings as a higher quality option. In the key Netherlands home market, market share has increased year on year since 2016 with a MAT value share 2019 YTD of [xx% - redacted] vs. [xx% - redacted] in 2016, (a 5.3% increase).

OBJECTIVE: EXTEND INTO NEW MARKETS (POLAND, RUSSIA, EASTERN EUROPE) TO REDUCE DEPENDENCE ON THE HOME MARKET (THE NETHERLANDS)

Due to its retail success, Danerolles was able to expand into 3 new markets in 2018/2019 (Estonia, Hungary, Norway) with 3 more markets in progress for 2020 (Romania, Poland, Russia). The Netherlands accounted for [xx% - redacted] of total volume in 2011, and now accounts for [xx% - redacted] of total volume. The larger footprint has reduced dependence on one key market.

RESULTS CONTINUED

ADDITIONAL EFFECTS FOLLOWING THE REDESIGN:

ALL-TIME HIGH BRAND AWARENESS

The bold new look of Danerolles has created saliency in people's minds and the brand is experiencing all time high brand awareness in its home market, from [xx% - redacted] in 2016 to [xx% - redacted] in 2019 (a 10% increase).

REINVIGORATED PRODUCT DEVELOPMENT

By igniting growth and clear market leadership, the new design has allowed the brand, in 2019, to launch new product innovation to a now more receptive set of retailers, such as pizza dough and cinnamon rolls, with more to come.

“

The revival and the strong mind position of our iconic can after the redesign convinced us to attack the other (internationally much bigger) segment of the fresh dough category: the launch of pizza dough. So Danerolles is moving from a breakfast proposition towards an all occasion proposition for the weekend.

Piet Decuyper, CEO,
Danerolles BV.

”



Influencing Factors

- Every year the brand spends +/-€250k in consumer communication and a similar amount in brand shopper communication (shelf talkers, stickers) across mature markets (BENELUX). This amount has been stable for many years, including the redesign launch year, prior and subsequent years.
- The brand did not reduce prices before, during or after launch.
- Additionally, there was no change in product formula or ingredients used.

SOURCE OF DATA

Nielsen Quarterly MAT reporting, July 2019
IRI, 2014

Burat Qualitative research, May 2016

Ruigrok NetPanel Research, July 2016

Sprint research, September 2019

Internal Consumer and Careline Services data

