

A background image of a city skyline at sunset. The sky is a vibrant orange and yellow, with the sun low on the horizon, partially obscured by the silhouettes of various skyscrapers and buildings. The foreground shows dark silhouettes of trees and lower-level structures.

## Sander van der Laan

*Ahold Europe, COO*

**Broadening our offer**  
Format development

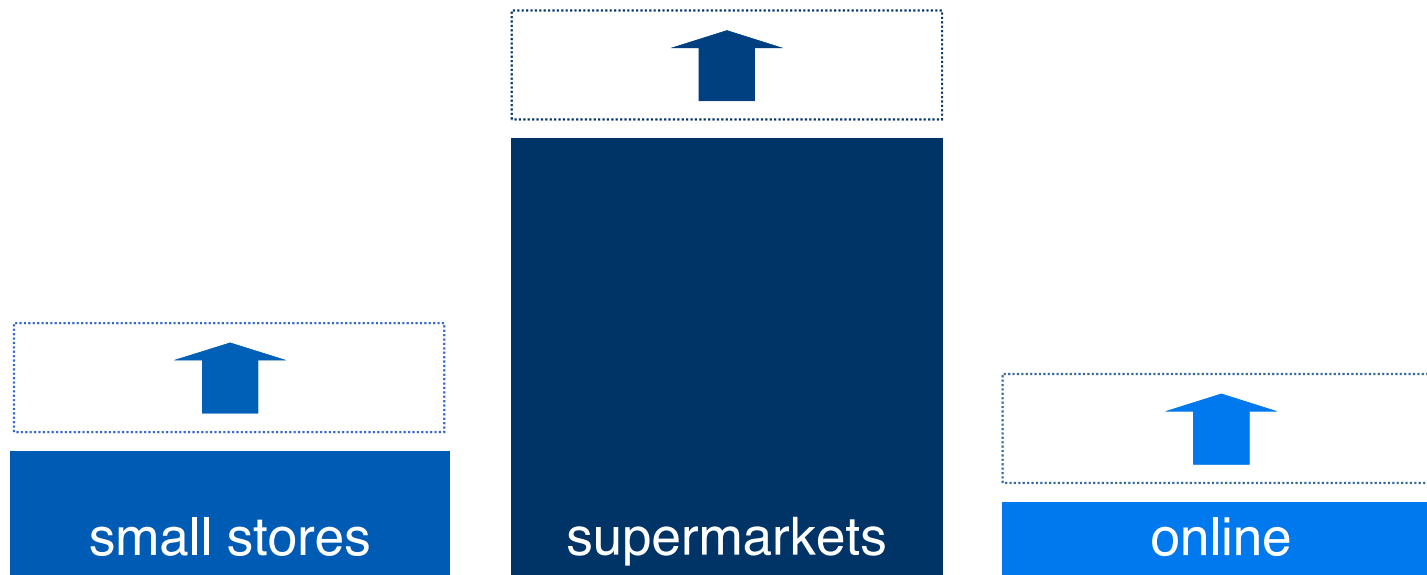
## **We believe in a multi-format strategy**

Leveraging our brand, customer relations and capabilities



# From our solid foundation, grow all segments

Utilizing market opportunities and leveraging best practices



# Within our supermarkets we differentiate as well

Adapting supermarket size and function to local characteristics



# Further strengthening our core supermarkets

1. Increase customer loyalty



2. Broaden our offering

Market-winning loyalty programs

Great customer service and shopping experience

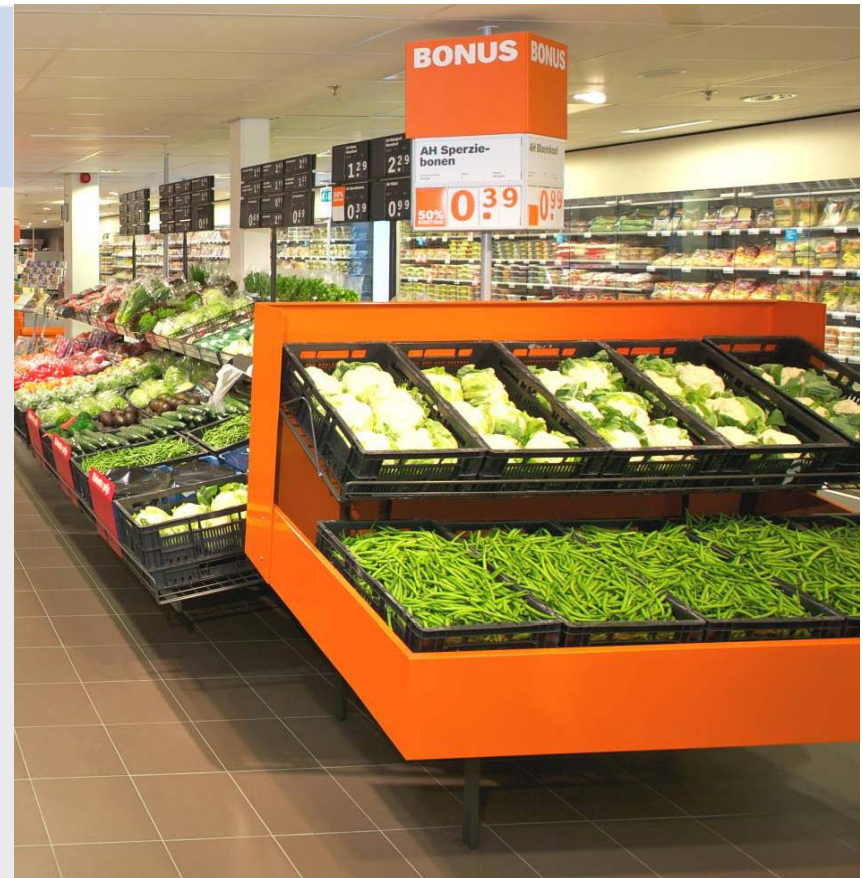
Best in Fresh

Strongest value equation (price x promo)

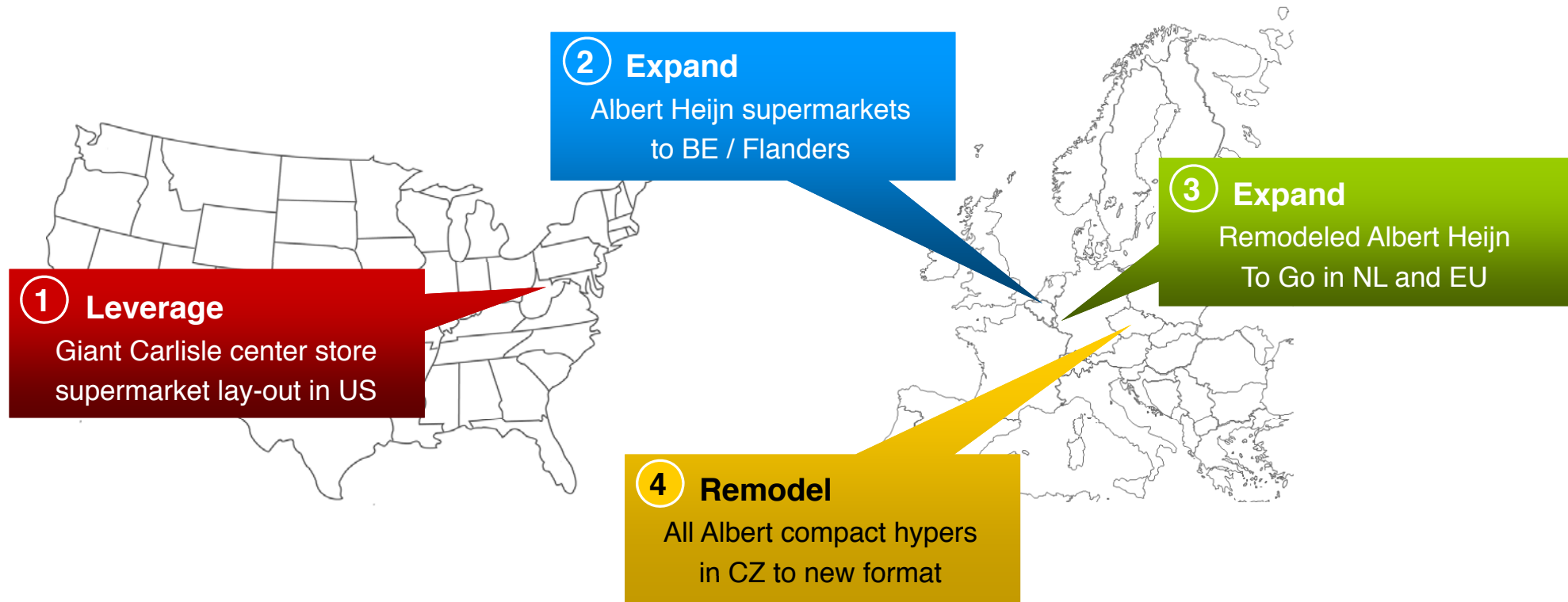
Best choice in national brands & own brands

Develop our assortment:

- Convenience
- Non food (Europe)
- Ethnic (United States)

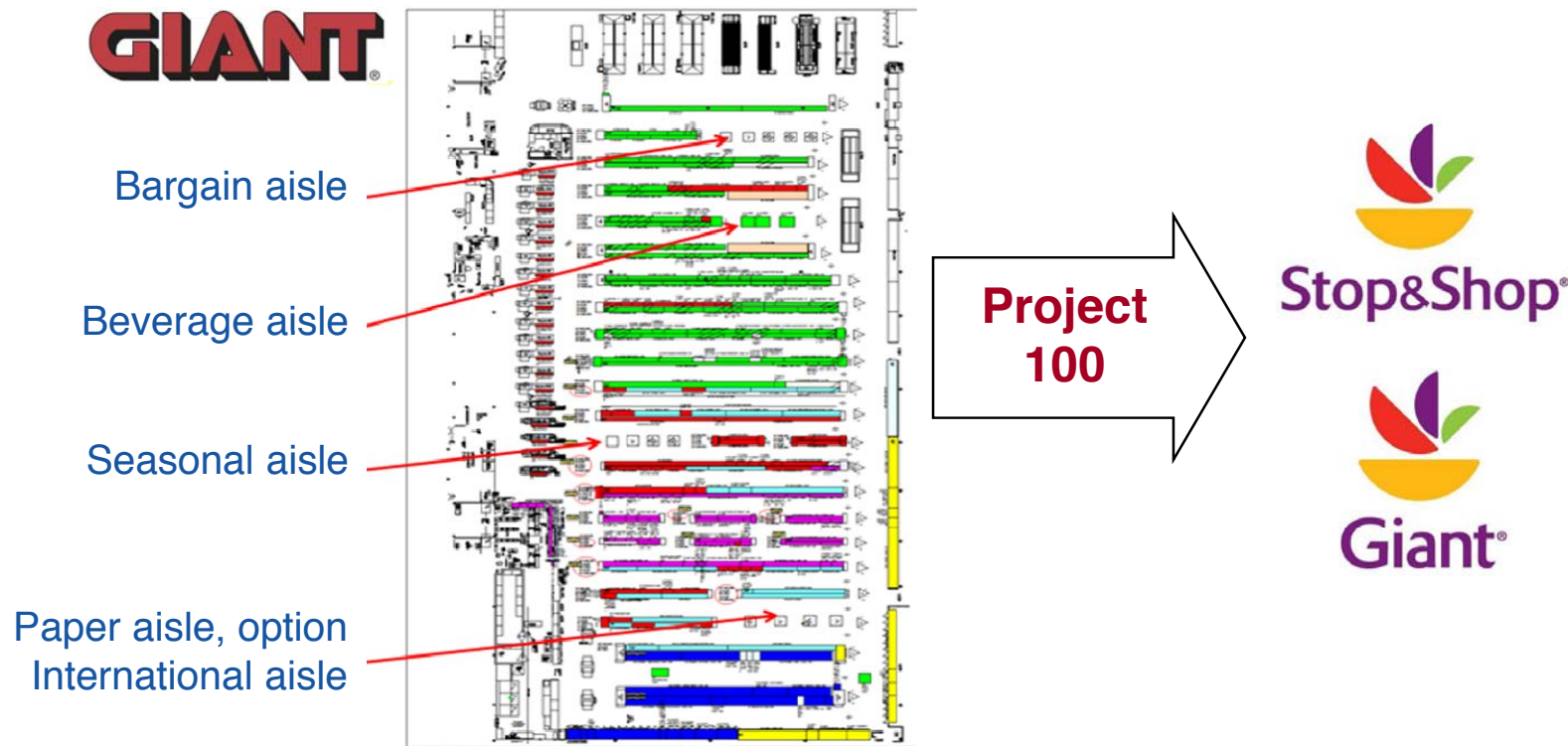


# Share four format initiatives across Ahold



# 1 USA – supermarket center store concept

Leverage best practices across the US divisions





# 1 Approach center store upgrade



Right-sizing of GM categories

More efficient product assortment and variety

Creating exciting and relevant zones with improved appearance

Correcting flow and getting customers to shop the entire store

2011 6 pilots  
2012 50 stores complete  
2013 100 stores complete

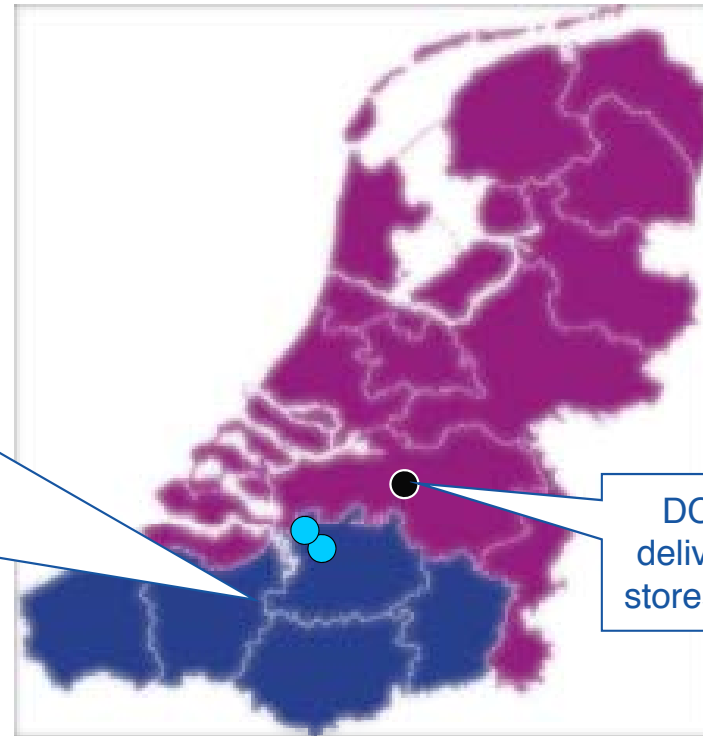


## 2 Flanders – Albert Heijn supermarkets

Adjacent expansion leveraging our NL backbone

### Opportunities Flanders

- 6.2 million inhabitants
- ~€10 billion market (1/3 of NL market)
- 90 -140km from DC Tilburg
- Dutch language
- Retail prices at higher level than in NL



● AH Belgium

## 2 Distinctive Albert Heijn proposition in Flanders



Strategy: Leverage our AH brand, supermarket format and operating model

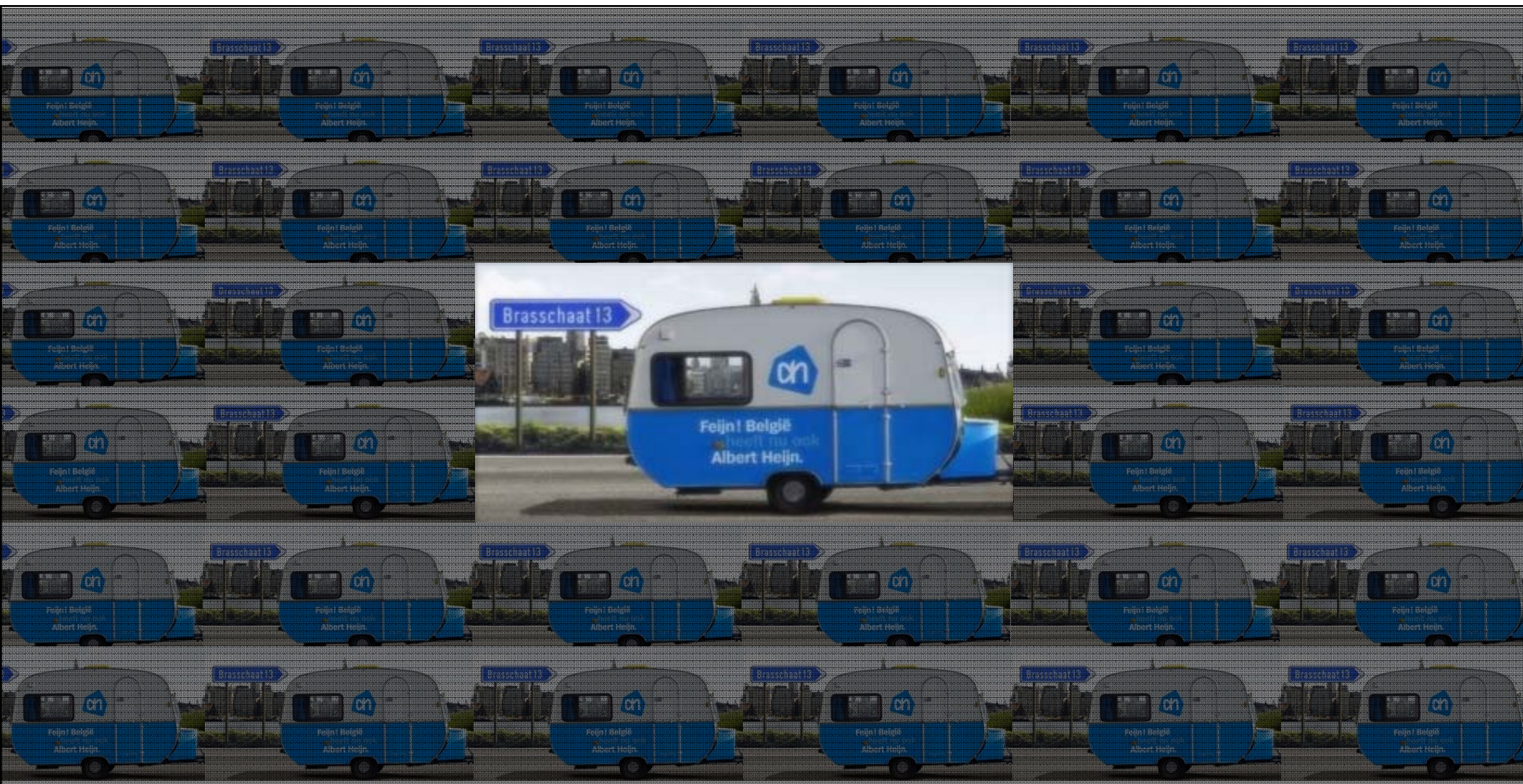
Proposition: "Personal service, Belgian quality, Dutch prices"

Albert Heijn has a very strong price position and image and competitive cost structure

Expanding through franchise and own stores

Growth targets: 2012 > 10 stores total  
2016 > 50 stores total







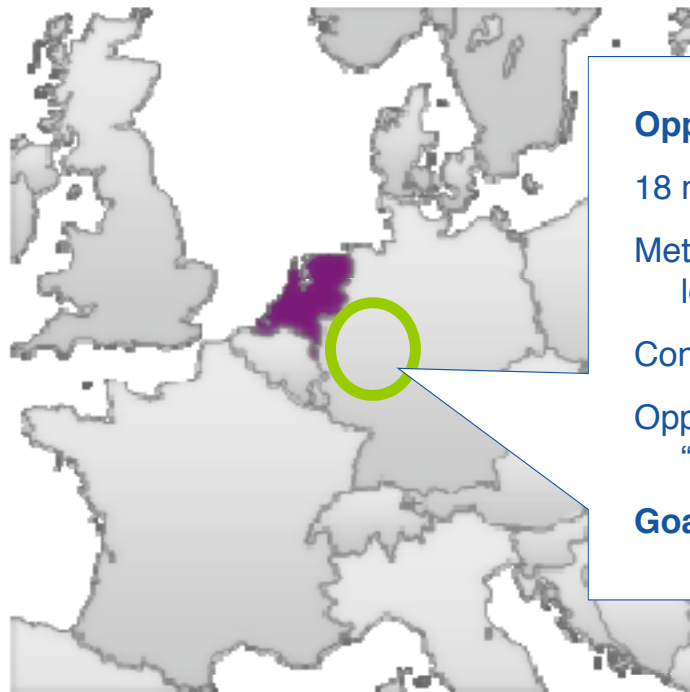
## 2 First two Flanders stores are a great success



### 3 Remodel and roll out Albert Heijn to go

Develop convenience by leveraging our NL backbone

experience  
with 53 to go's  
in NL



#### Opportunities Germany Nord Rhein Westfalen

18 million inhabitants

Metropolitan area with high density and high traffic locations

Convenience to go underdeveloped

Opportunity for a great selection of products "on the go"

**Goal: >200 stores in EU in 2016**

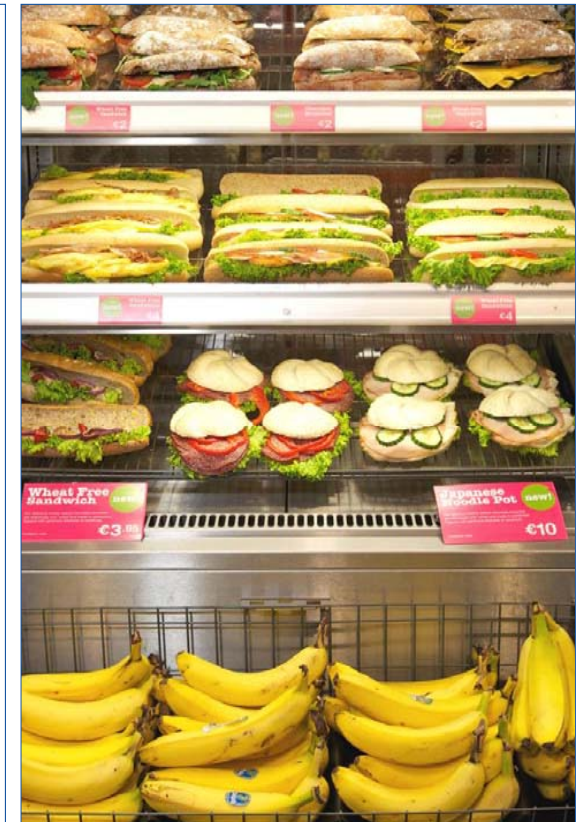
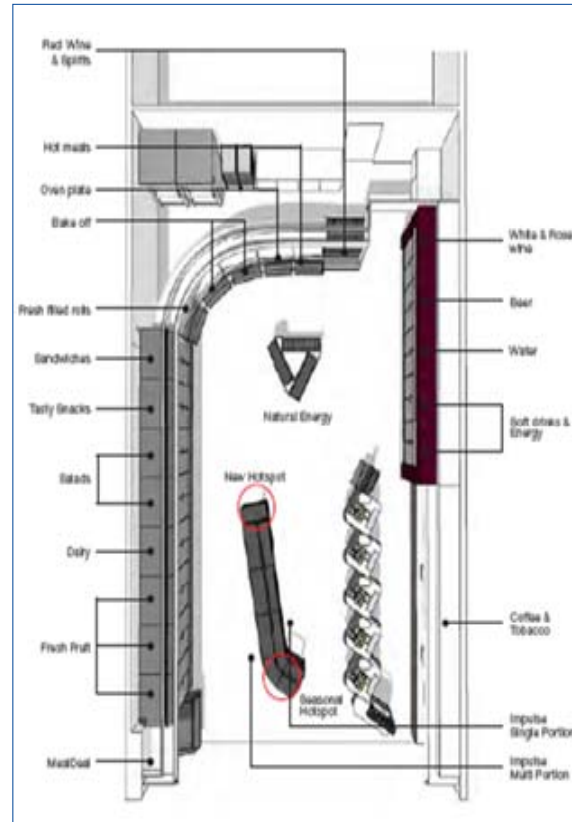


### 3 Our new Albert Heijn to go format

	Albert Heijn to go current	Albert Heijn to go new
Size in m <sup>2</sup>	40 - 200	50 - 150
Sales in €/ m <sup>2</sup>	140 - 1,350	150 - 1,500
Focus	Food for now and Food for later	Food for now
Sku's	1,200	700
Assortment	National	Trans-national



### 3 A taste of the new Albert Heijn to go



## 4 Czech – Albert compact hypers

Remodeling and strengthening our network

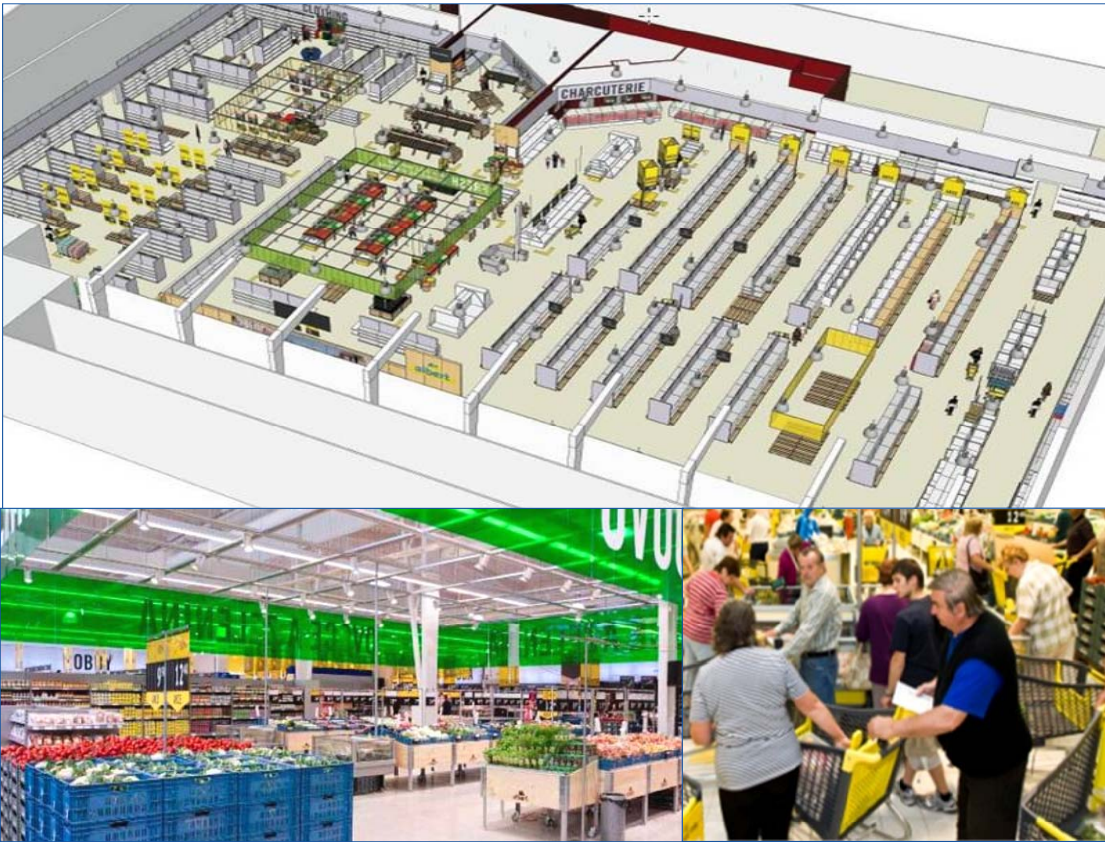


220 supermarkets  
55 compact hypers

CZ Nielsen Market	2005	2010	2020
Hypermarkets (>6,000m2)	20%	16%	11%
<b>Compact hypers (2.000-6,000m2)</b>	<b>18%</b>	<b>26%</b>	<b>30%</b>
Supermarkets	20%	20%	26%
Discount	15%	17%	21%
Traditional trade	28%	21%	12%



## 4 Approach CZ compact hyper remodeling



### Strategy

Reposition and re-establish our compact hyper format

2,500 – 5,000 m<sup>2</sup>

Food and non food

Best in fresh, great dry and non food value

### Current network

55 compact hypers

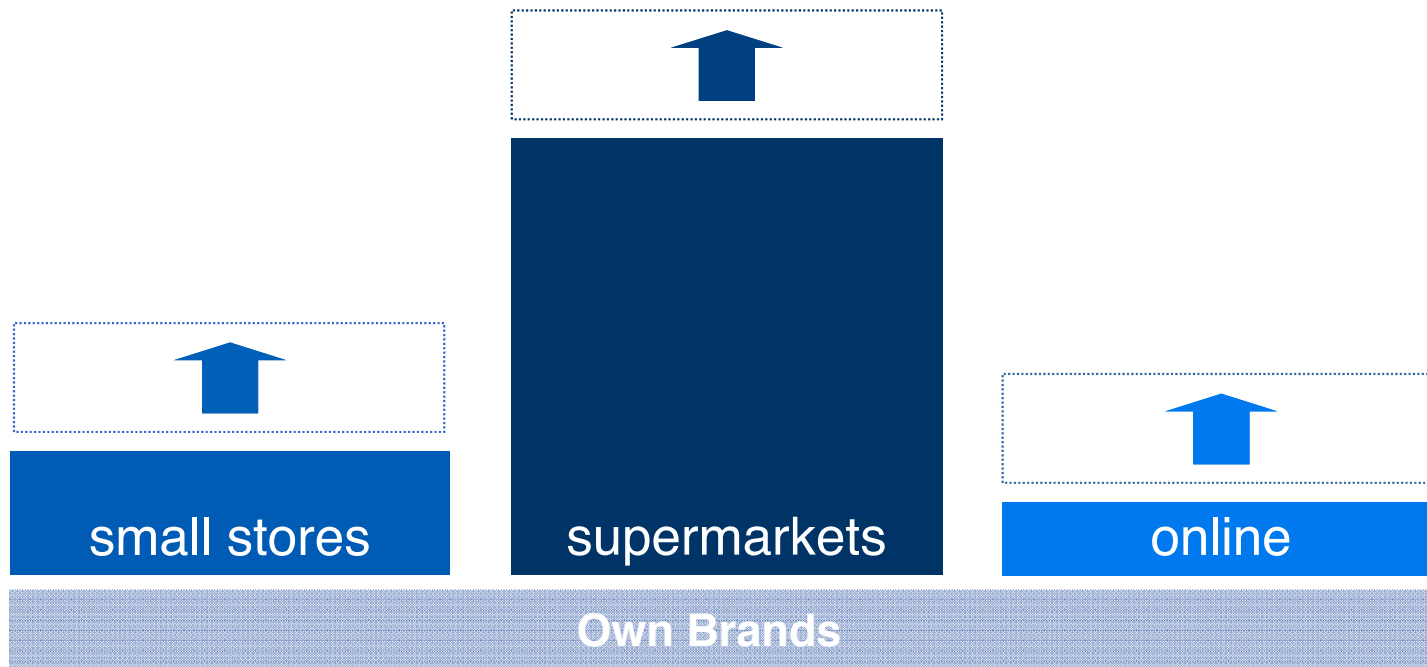
45% of total Albert sales

Average age 8 years

### Target

All 55 compacts will be remodeled by 2016

## We will strengthen our offer with our Format Development





# Safe harbor

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