



profilingpartners

the executive search advisors who really care

**Industry Survey
on Senior Executive Talent
in Swiss FMCG**

2011



**Major FMCG Industry Trends,
resulting Profiles of Senior Executive Talents
and current Talent Search Strategies**

ABOUT PROFILING PARTNERS

Profiling Partners is a specialized executive search firm of first choice to entrepreneurial multinational, family-owned and start-up companies, offering **executive search services as a systematic approach**, with industry knowledge and true dedication.

Profiling Partners is the leading Swiss provider of **executive search for entrepreneurs, by entrepreneurs**. Our clients are owner-operated smaller and medium-sized businesses (SMEs), elected entrepreneurial business areas of international corporations and start-ups.

With Profiling Partners - **the executive search advisors who really care** - you have **one partner to look after you personally** and profit from an entrepreneurial result driven and cost conscious way of executive search. Our true added-value in your talent acquisition reflects in getting the right candidate for your specific entrepreneurial challenge.

Our Partners specialize in industries, functional areas and specific talent markets. They have gained their experience and knowledge working as executives in the industry they serve. Commitment to quality and prompt results fit seamlessly with absolute confidentiality and true dedication.

Our Specialisation on the Swiss market

Specialised in board level appointments and other senior functional positions in general management, sales, marketing, finance, HR, operations and IT, we focus on:

Consumer & Retail – Financial Services – **FMCG** – Life Science & Health Care / OTC – Luxury – Media / Entertainment / Leisure – Professional Services – Sports – Technology – Sales & Marketing – Board Searches – Female Executives – Latin American Executives – Start-up & Ventures

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FOREWORD



Daniela Wyss
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Financial crisis by the end of 2009 accelerated the **structural change in Swiss FMCG**. The pricing spiral whirling faster and faster, trade concentration, new international retailers or new EC legislation influencing marketing claims are just a few examples for current challenges to the Swiss FMCG industry.

To better serve our clients and create added-value for Swiss FMCG, Profiling Partners tried to identify the **impact of these industry specific challenges on Senior Executive Talent Profiles**.

As a Partner specializing in Consumer & Retail from the end of 2009 until the beginning of 2011 I personally interviewed two dozen **CEOs and Board Delegates** as well as **Commercial and HR Directors managing producers, marketing & sales subsidiaries, retailers and distributors in FMCG mass market or B2B all over Switzerland**.

In the course of these **one-on-one interviews** these industry experts attempted to answer questions, such as: what are your main business challenges? How do they affect the profiles of your Senior Executive Talents? How fit are your current talents for these new challenges? Where do you encounter difficulties in onboarding such Senior Executive Talents and do you think salaries in Swiss FMCG industry might be affected? How do you identify and attract your talent? And most important: do they actually exist these talents in Swiss FMCG and what characterizes them exactly?

We would like to thank all participants for their valuable contribution to this Talent Study in Swiss FMCG industry. This series of surveys demonstrate Profiling Partners' commitment to understand in depth FMCG industry challenges and Senior Executive Talent, shaping the Top Management's aspiration to onboard real talent in Switzerland.

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SELECTED QUOTATIONS OF SWISS FMCG EXPERTS OUT OF MORE THAN 30 HOURS PERSONAL INTERVIEWS

Selected quotations on Swiss FMCG challenges

- „FMCG in Switzerland is getting faster.“ Koen Burghouts, Managing Director Danone (Schweiz) AG
- „Die Herausforderung für FMCG Unternehmen auf dem Schweizer Markt liegt darin, die richtigen Talente zu finden, die das Gefüge von traditionellen Schweizer Werten und stark intensiviertem europäischen Wettbewerb in Chancen umzusetzen wissen.“ Corinna Ortner, General Manager Switzerland & Austria Evian-Volvic Suisse S.A.
- „Es müssen immer schneller, immer mehr Aufgaben bewältigt werden und das mit zunehmend beschränkten Ressourcen aufgrund des weiter ansteigenden Kostendrucks.“ Christof Schibli, Managing Director Haecky Fine Food AG
- „In den letzten 10 Jahren haben im Schweizer Detailhandel dramatische Veränderungen stattgefunden. Kunden wie Waro, Jumbo / Carrefour, ABM, Epa, Pick Pay oder Primo/Visavis sind einfach verschwunden. Es ist schlichtweg lächerlich, was die WEKO hier geboten hat.“ Toni Lötscher, Geschäftsführer Halter Bonbons AG
- „Zweifel hat die Trumpfkarte innovative Leistungen für Kunden und Konsumenten konsequent und erfolgreich ausgespielt.“ Dr. Mathias Adank, Delegierter des Verwaltungsrats & CEO Zweifel Pomy Chips

Selected quotations on Senior Executive Talent in Swiss FMCG

- “Wir stellen Top-Leute ein, die uns herausfordern!” Remo Barile, Managing Director Barilla
- „Marketing ist keine exakte Wissenschaft. Man muss es im Blut haben. Wir suchen keine klassischen Marketers, sondern „Guerilla Botschafter“, die eine klare Affinität für unsere Marken haben.“ Peter Schmid, Managing Director Campari
- „Ein echtes Talent kann Menschen führen, weil es Menschen mag, weil es versteht, sich in die Menschen hineinzusetzen. Das spürt auch der Kunde. Ein Talent muss aber in ein Umfeld eingebettet sein, in dem es sich entfalten kann.“ Dr. Jean Villot, CEO - Delegierter des Verwaltungsrates Hügli Holding AG
- „Wir suchen Talente, die in den Bus einsteigen, weil sie sehen wer drin sitzt und nicht fragen, wo er hinfährt.“ Dr. Felix Obrist, Geschäftsführer Oswald Nahrungsmittel GmbH“

„Es gibt nicht so viele Distributoren in der Schweiz. Umso schwieriger ist es, Talente zu finden, die pragmatische Macher sind und konzeptionelle Stärke beweisen...im Sandwich die Bedürfnisse des Principals und der Handelspartner befriedigen. Diesen hohen Erwartungen gerecht zu werden, ist eine echte Herausforderung für einen Distributor.“ Alex Minder, CEO Valora Trade

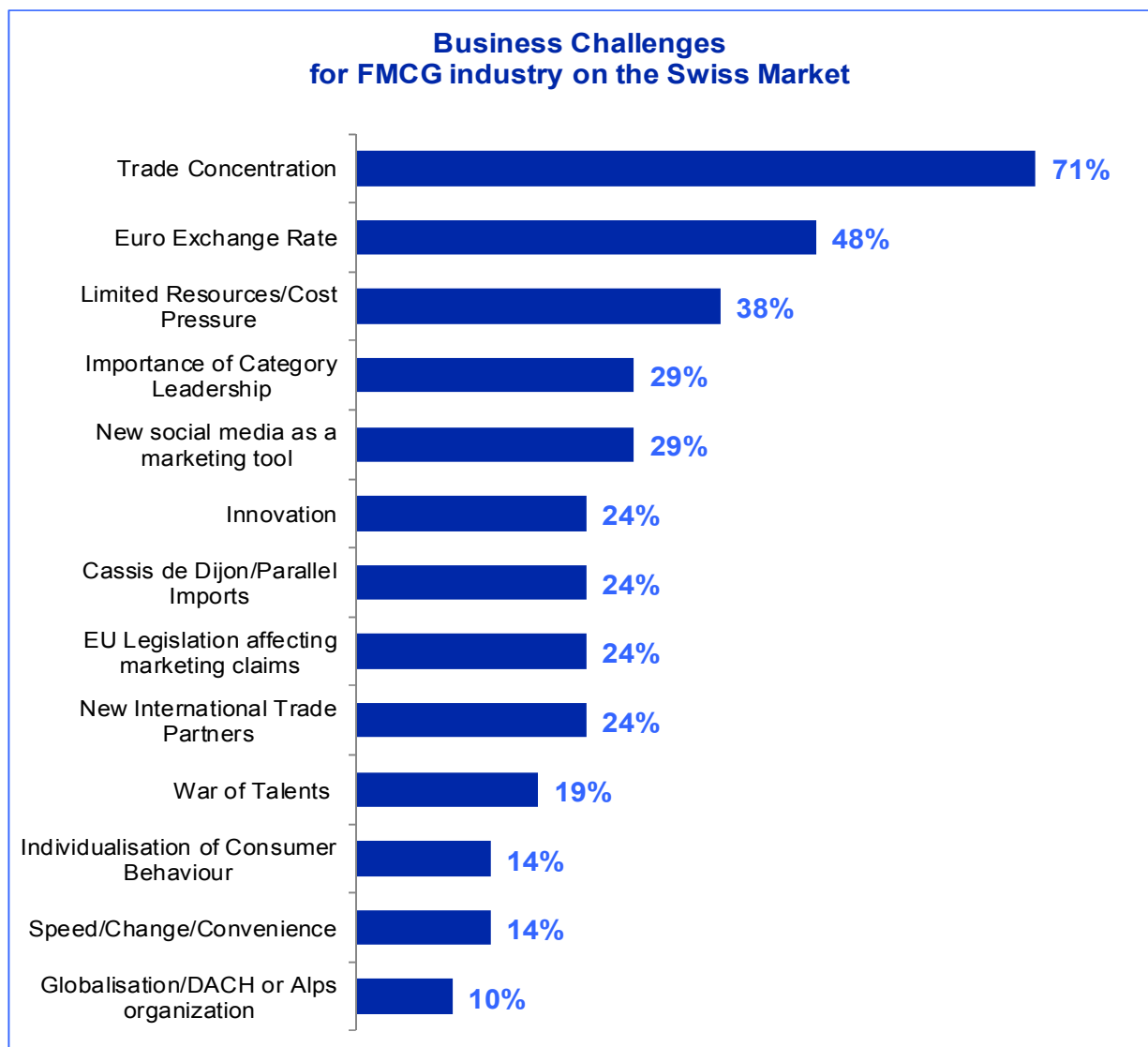
Selected quotations on talent lack in Swiss FMCG

- „Es ist schwierig, an Schweizer Talente zu kommen.“ Flavio Calligaris-Maibach, Geschäftsführer Schweiz Coca-Cola GmbH
- „Im Key Account Management verändert sich das Anforderungsprofil weg vom klassischen Beziehungsverkäufer hin zum eigentlichen Berater, der bereichsübergreifend denkt und handelt und über starke konzeptionelle Fähigkeiten verfügt.“ Marc Heim, Head of Sales Emmi Gruppe
- “In der Schweiz finden sich vor allem Talente in Branchen, die traditionelle Schweizer Werte wie Präzision, Sicherheit, Kontinuität oder Verlässlichkeit verkörpern - wie etwa Pharma oder Financial Services. Für FMCG stellt sich also die Frage: sind die Schweizer "fast"?" Dr. Kiyan Nouchirvani, Senior Vice President Corporate Services Hero Gruppe
- „Wir brauchen Talente mit dem richtigen Rucksack. Je mehr Produktionsunternehmen auf dem Schweizer Markt eingehen, desto schwieriger gestaltet sich die Suche nach Kandidaten mit diesem ganzheitlichen Profil.“ Barbara Hösli, Bereichspersonalleiterin Lindt & Sprüngli (Schweiz) AG, Schokoladefabrik
- „Wir suchen Leute, die auch gegen oben „challengen“ und sich getrauen, anders zu sein.“ Christian Bennefeld, Commercial Director L'Oréal Suisse S.A.
- „Die grösste Herausforderung für das Executive Search ist es, das Unternehmen zu verstehen, seine Kultur einzusatmen.“ Sandro Vetterli, General Manager Switzerland & Austria Reckitt Benckiser
- "In der Schweiz war die Grundstimmung zwischen Industrie und Handel bisher primär konsensorientiert. Durch Firmenzusammenschlüsse und internationale Kooperationen verschärft sich aber das Klima in den Jahresgesprächen zunehmend. Daher ist es z.B. auf Stufe Key Account Manager relativ schwierig, gute Leute zu finden, welche dem zunehmenden Druck gewachsen sind.“ Daniel Kallay, General Manager, Delegierter des Verwaltungsrates Red Bull AG

WHAT ARE THE KEY INDUSTRY DRIVERS, THE MAIN CHALLENGES, THREATS AND OPPORTUNITIES IN SWISS FMCG INDUSTRY IMPACTING ON SENIOR EXECUTIVE TALENT PROFILE?

The major industry trend in Swiss FMCG remains **trade concentration** further triggering **cost pressure and limiting resources** of every third survey participant.

Consumer prices in Switzerland are tumbling but few consumers realize that this price reductions in Swiss retail trade result in a need for lower cost for the industry too. Cost pressure forces Swiss FMCG industry to centralise functions in DACH or Alps organizations or outsource production out of Switzerland. Switzerland seems to be a market which is losing priority in an international context due to minor market size and higher complexity.



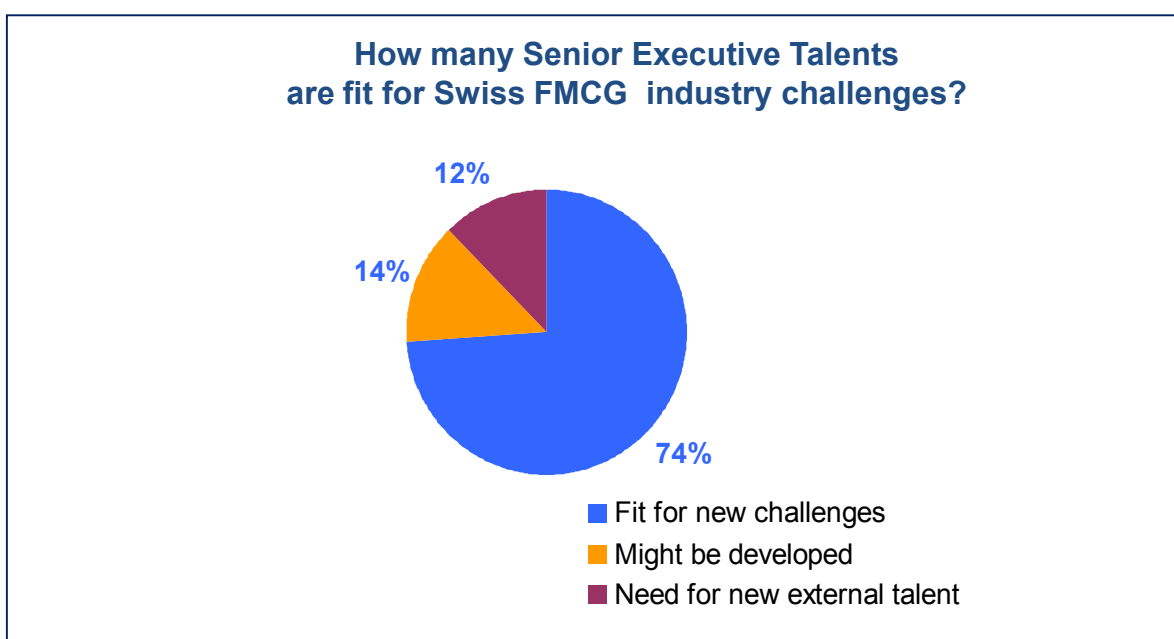
With increasing trade negotiation power ultimately trade is deciding on innovation and new product launch. Shelf space with fewer trade partners gets even more precious and there is no space left for brand number 3 or 4. Competition is tough and the need for differentiation in Swiss FMCG is constantly increasing. **Category leadership, innovation** or 1 to 1 communication to consumers via **new social media** get vital for almost every third of interviewed FMCG experts to secure growth in the saturated Swiss market.

Industry internationalisation is clearly accelerating. Subsequently **European issues like EC legislation and Euro exchange rate** gain importance.

But are Senior Executive Talents in Swiss FMCG ready to face this accelerating world? Has industry change already led to specific talent lacks? And, what exactly characterizes Senior Executives Talents who are fast enough for Swiss FMCG?

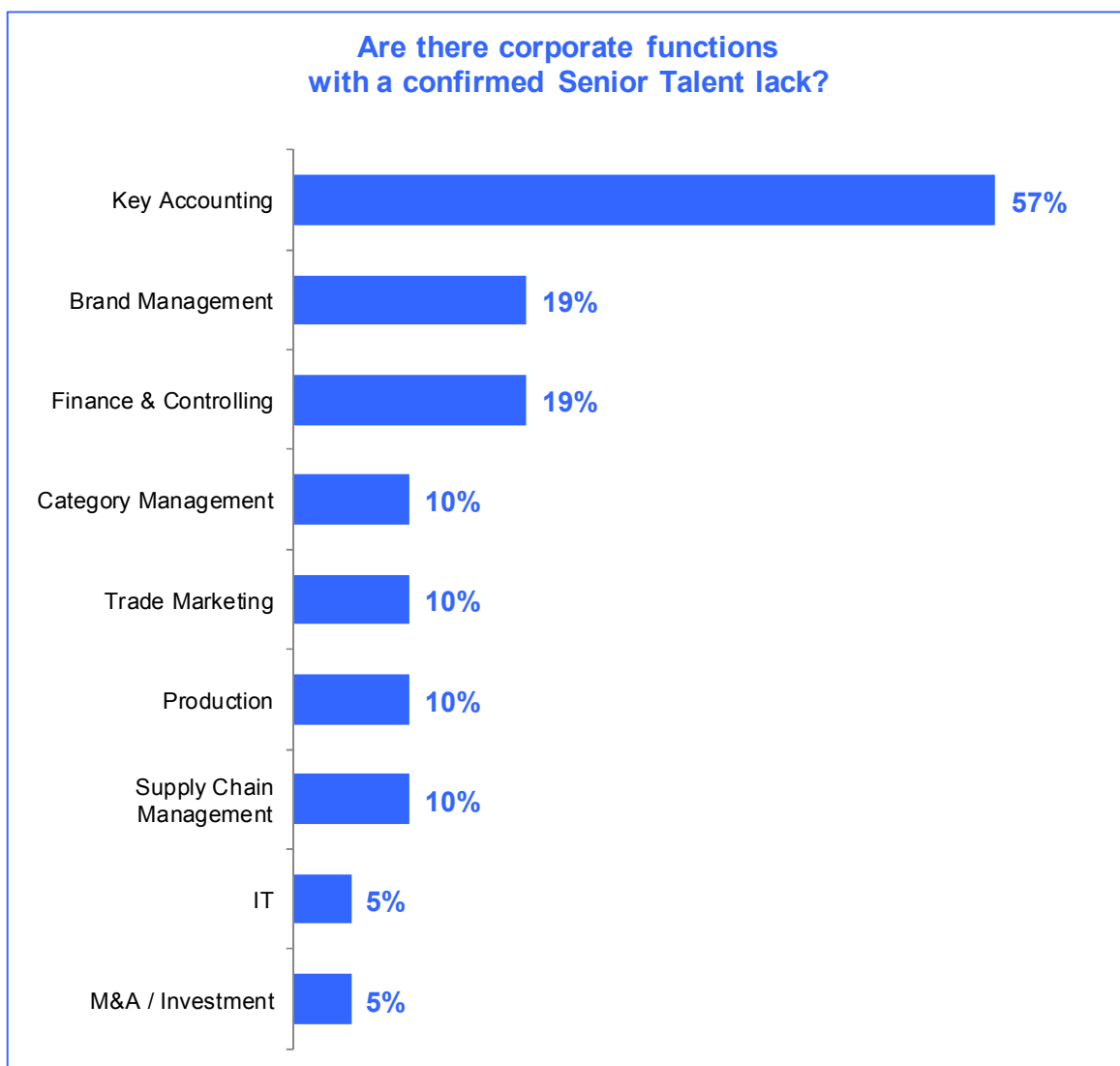
EVERY FOURTH SENIOR EXECUTIVE IS NOT FIT ENOUGH FOR THIS FAST MOVING ENVIRONMENT

Senior Executive Talents in Swiss FMCG are primarily lacking soft skills like **passion or entrepreneurship** to tackle the multiple challenges in a real fast moving highly international environment with more and more limited resources. These soft skills according to FMCG experts are clearly genetical and hard to train or develop.



SALES TALENT IS SCARCE IN SWISS FMCG

Every second interview partner experiences a sore **lack of Key Account Management talent**. Some say it is the changing negotiation culture with the further concentrating and internationalizing Swiss Trade which discourages sales talent attraction. Others explain it with the supremacy of marketing in their FMCG company. And although this lack of outstanding Key Account Managers during the last years intensified, others assume it to stop in the near future and they dream of international KAM teams when internationalisation of sourcing within trade partners has been completed.

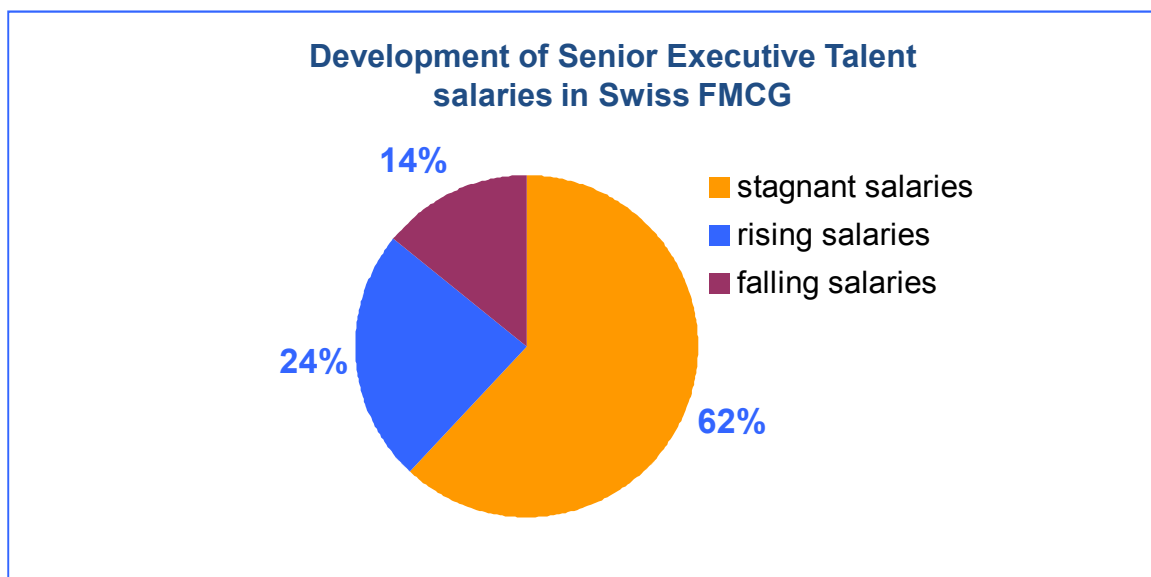


Adding up the specialised marketing functions BM, TM and CM, again every second survey participant encounters a **lack of marketing talent - in the marketing driven FMCG**. Some shortages are easier to explain as more and more production facility is outsourced of Switzerland only few marketing talents master the entire marketing mix, including product development. But offer for international marketing talent familiar with the Swiss consumer is short too, as more and more employers go for DACH or Alps (Switzerland & Austria) organizations asking for multi consumer know-how on brand portfolios on more than the Swiss market only. International marketing talent with true international mobility, multilingual and multimarket/multichannel functioning is more and more wanted.

The lack of industry appreciation of FMCG might be responsible that the **Finance & Controlling talents** due to moderate salary incentives in Swiss FMCG are rather attracted to the in Switzerland highly esteemed Financial Services or Life Science & Health Care industries.

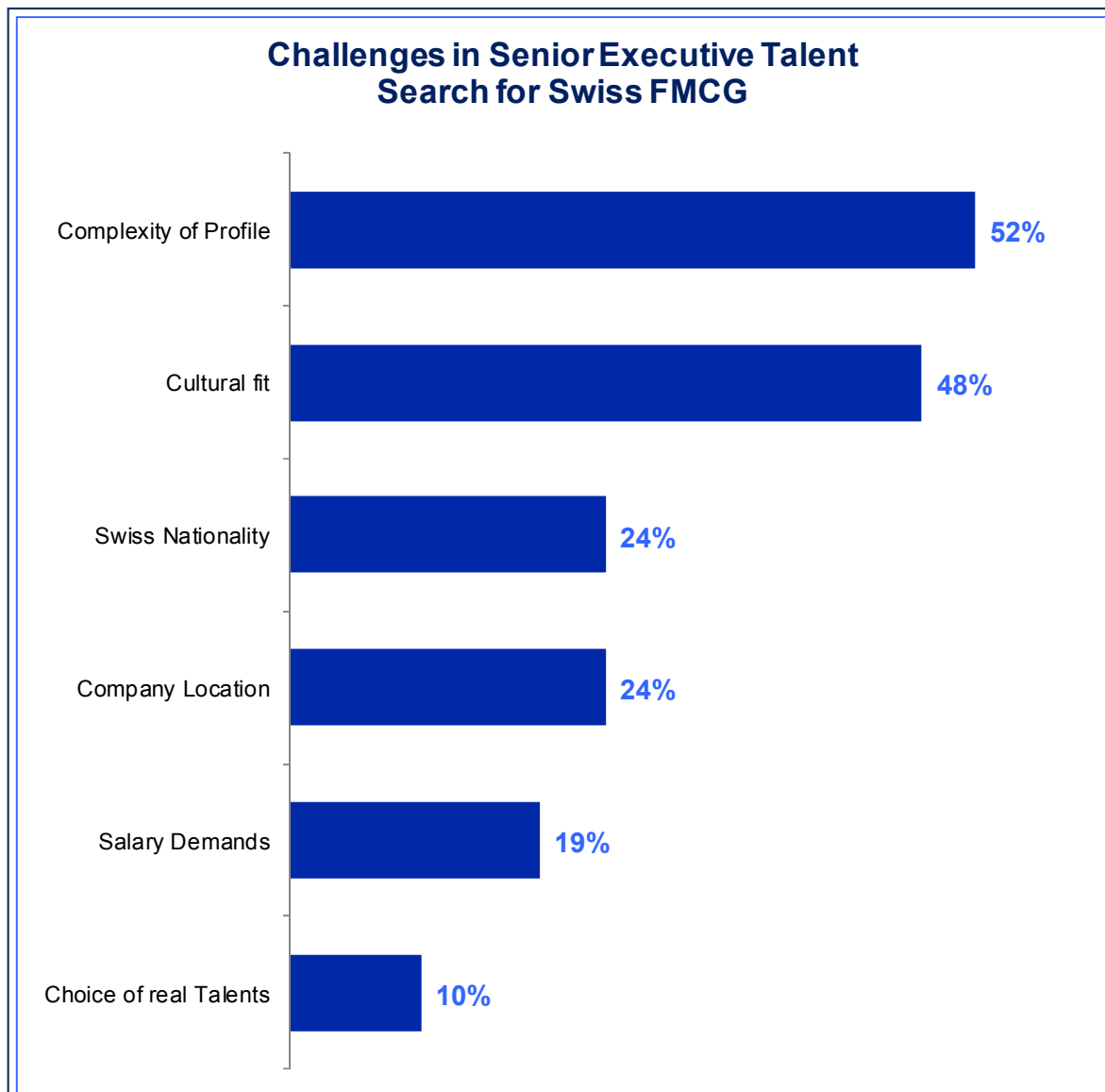
HOW MIGHT COMPENSATION REACT ON RISING REQUIREMENTS AND PUNCTUAL LACK OF TALENT?

Due to increasingly high cost pressure **salaries are seen to be stagnant**. Every forth industry expert hopes for rising salaries to help Swiss FMCG to attract the right talent for the ongoing acceleration in Swiss FMCG. Some think that other factors like the internationalisation of the external labour market and the continuous stream of non-Swiss company-internal talents might even prompt salaries to fall.



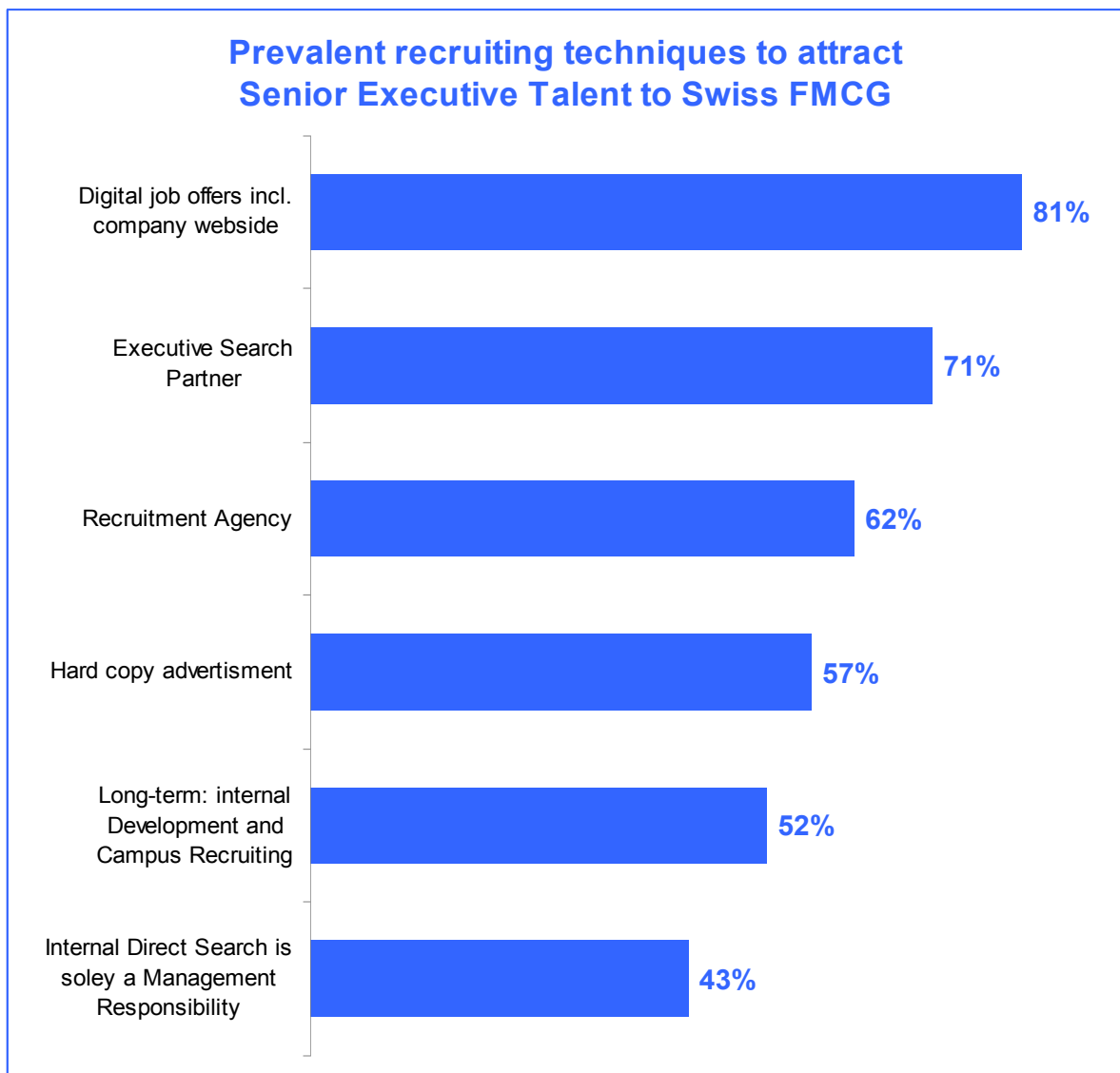
THE MAIN CHALLENGES IN ATTRACTING SENIOR EXECUTIVE TALENTS FOR SWISS FMCG ARE THE INCREASING COMPLEXITY OF PROFILE AND THE CULTURAL FIT.

With increasing complexity of internal and external systems candidate profile gets more and more complex too. Cost pressure and functional centralisation ask for ever more engagement of every Senior Executive Talent. Subsequently every second interview partner thought the **cultural fit (feu sacré) and the complex role the most difficult to resolve in Senior FMCG Executive Talent search.**



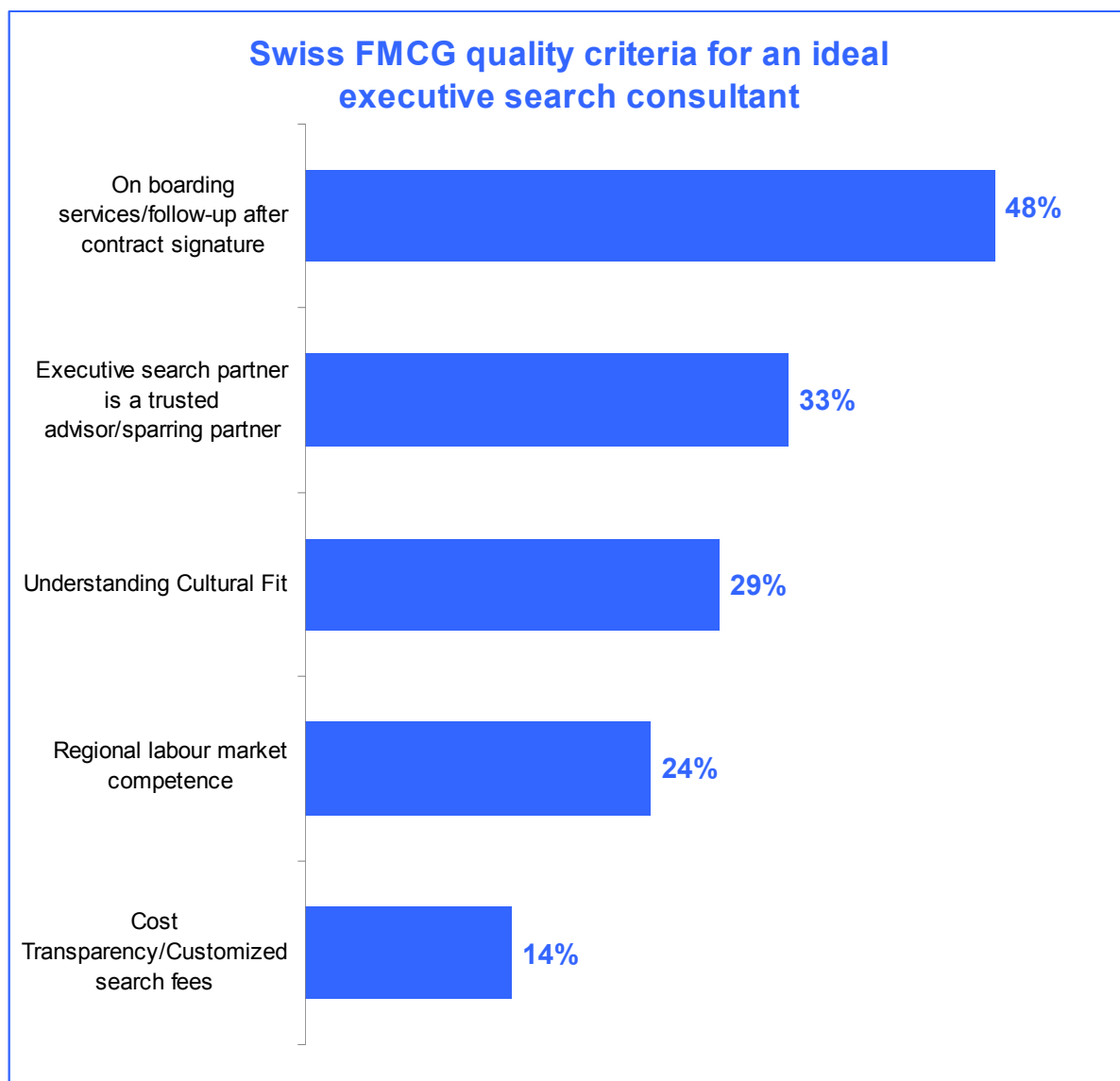
SWISS FMCG COUNTS ON „MAKE AND BUY“ IN ATTRACTING EXCEPTIONAL SENIOR EXECUTIVE TALENT

The majority of industry experts counts on the **digital labour market** to effectively attract Senior Executive Talent. Every third employer partners with an **executive search consultant** to directly search, **identify and successfully attract their senior talents**. Some FMCG employers rely only on their own (limited) corporate and personal network to source for external Senior Executive Talent.



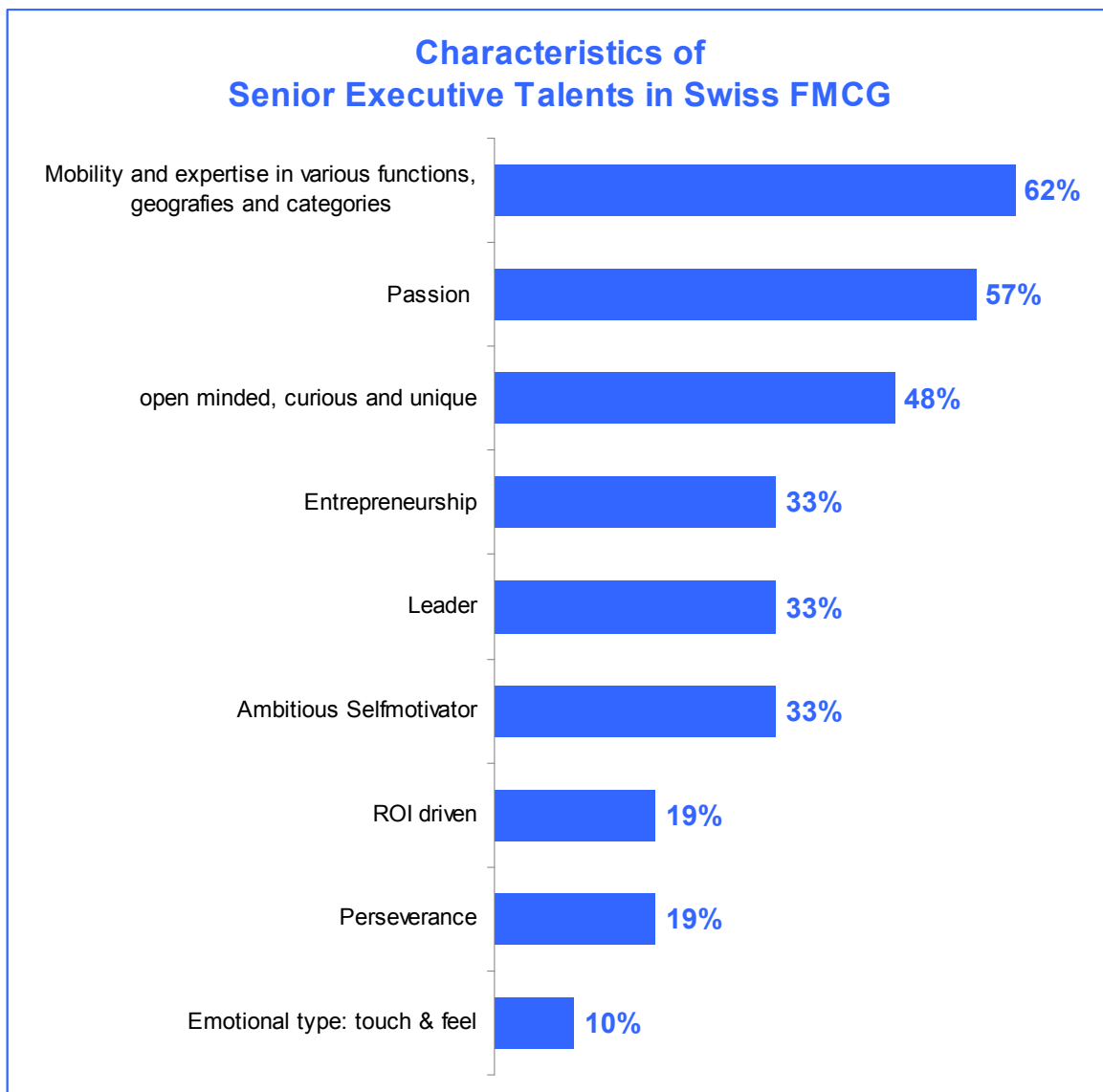
SWISS FMCG IS EVER MORE DEMANDING FOR EXECUTIVE SEARCH CONSULTANTS

According to every second interview partner **an ideal executive search consultant acts as a trusted advisor** in identifying and successfully on-boarding Senior Executive Talent for FMCG clients. Swiss FMCG companies look for an in-depth industry expertise, conceptual capabilities to understand client strategy, structure and culture and an exquisite FMCG network into the Swiss and the international talent pool.



WHAT CHARACTERIZES REAL SENIOR EXECUTIVE TALENT IN SWISS FMCG?

Swiss FMCG getting faster and faster is looking for senior talent **perfectly mobile** in geographical markets, corporate functions and industry categories. The most wanted Senior Executive Talents in Swiss FMCG are **open minded (curious and international) entrepreneurs with a true passion** for their company and their brands.



**HOW TO FIND PROFILING PARTNERS
THE LEADING SWISS EXECUTIVE SEARCH PARTNER
FOR ENTREPRENEURS, BY ENTREPRENEURS**



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