

Case Study | Confectionery | Mars Wrigley

M&M's holds 10% of chocolate space across Europe. **At its home airport, it had less than 4%.**



A Shelftrak audit benchmarked Mars Wrigley's share of confectionery and chocolate space at Amsterdam Schiphol against total Europe and six other hubs — and found the home hub at the bottom of every table.

CLIENT	CATEGORY	SCOPE	DATA
MARS WRIGLEY	CONFECTIONERY	AMSTERDAM SCHIPHOL V 6 EUROPEAN HUBS	SHELFTRAK AUDIT, AUG 2024

THE BRIEF

Measure the home hub against Europe, then against every other hub.

Mars Wrigley wanted to know how its confectionery portfolio was performing at Amsterdam Schiphol, using total Europe as the benchmark. That meant measuring share of space at three levels — total confectionery, total chocolate and the M&M's brand itself — and then benchmarking facings and SKU density against Toblerone, Tony's and Lindt on the same fixture.

Shelftrak compared Amsterdam with Heathrow, Gatwick, Frankfurt, Istanbul, Paris and Copenhagen. Amsterdam came last on every measure.

WHAT THE AUDIT FOUND

30%

below the European average
share of total confectionery
space in Amsterdam

45%

below the European average
share of chocolate space in
Amsterdam

60%

below the European average
share of chocolate space for
M&M's in Amsterdam

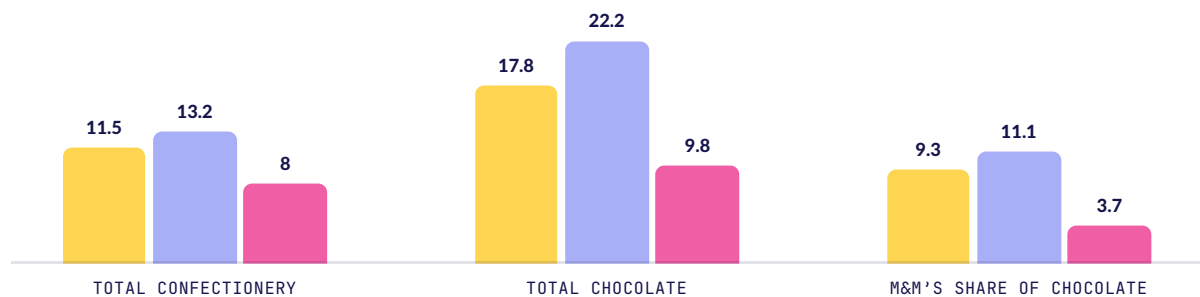
FINDING 01

The gap widens at every level of the category.

Amsterdam gives Mars Wrigley 30% less confectionery space than Europe, 45% less chocolate space, and 60% less for M&M's itself. The UK proves the portfolio can hold a fifth of the chocolate fixture. The home hub gives it under a tenth.

Share of linear space (%)

■ Total Europe ■ Total UK ■ Total Amsterdam



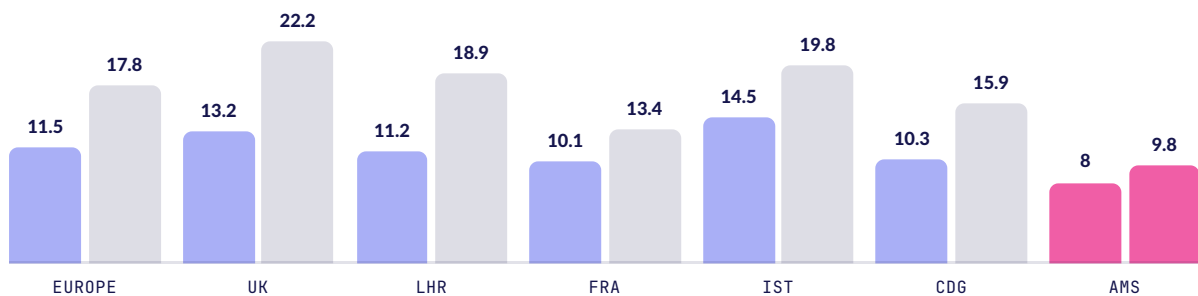
FINDING 02

Every other hub gives Mars Wrigley more chocolate space than Amsterdam.

Istanbul and the UK show the portfolio holding a fifth or more of the chocolate fixture. Frankfurt, the next-weakest hub, is still well ahead of Amsterdam on both measures.

Mars Wrigley share of linear space by hub (%)

■ Share of Confectionery ■ Share of Chocolate ■ Amsterdam



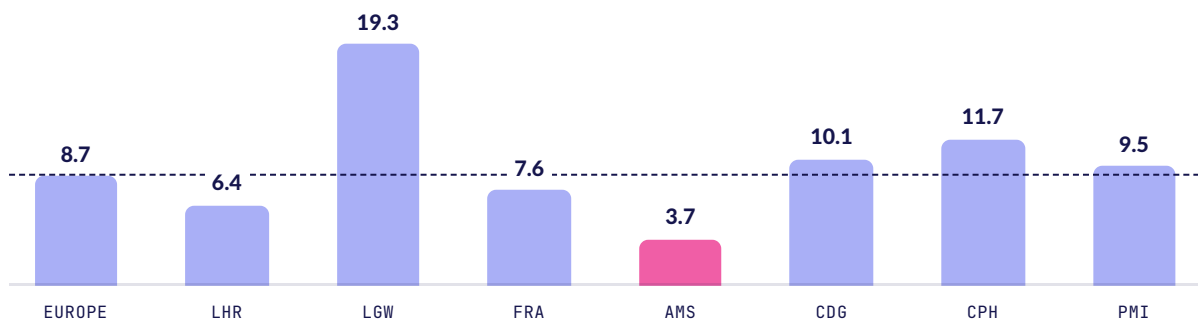
FINDING 03

M&M's in Amsterdam: the lowest share of chocolate at any major European location.

Gatwick shows what the brand can do with 19% of the chocolate fixture. Amsterdam, the 'home' hub, gives it 3.7% — less than half the European average and behind every other airport audited. This is where the audit went deeper.

M&M's share of chocolate linear space by hub (%)

----- European average 8.7%



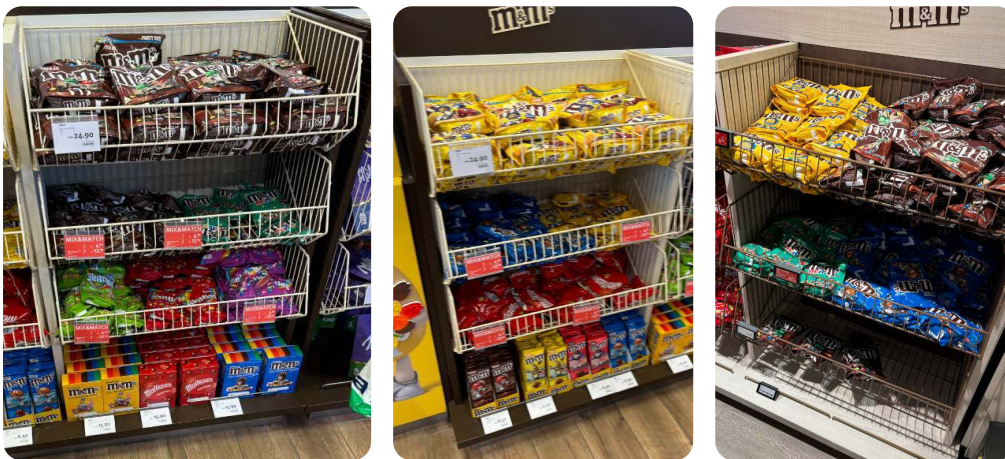
■ = AMSTERDAM, THE LOWEST SHARE AUDITED

INSIDE THE STORE — AMSTERDAM SCHIPHOL

Wire baskets, mixed brands, and a sixth of Lindt's facings.

The audit photos show M&M's in open wire baskets, sharing tiers with Skittles and Maltesers, with little branding and no standout. On the fixture, M&M's runs at 4.4 facings per SKU and Celebrations at 3.5. Toblerone gets 11.6 and Lindt Napolitains 27.

The contrast with a well-executed store is stark: in Heathrow T2 the same two Mars brands run at 16.7 and 31 facings per SKU. Amsterdam gives them a quarter and a ninth of that.



SHELFTRAK AUDIT PHOTOS — AMSTERDAM SCHIPHOL

FACINGS PER SKU

M&M'S	4.4
CELEBRATIONS	3.5
TOBLERONE	11.6
TONY'S	3.4
LINDT NAPOLITAINS	27

SKU DENSITY RATIO

M&M'S	0.63
CELEBRATIONS	0.6
TOBLERONE	2.24
TONY'S	0.46
LINDT NAPOLITAINS	2.5

SKU DENSITY RATIO = SKUS PER LINEAR METRE, AS REPORTED IN THE AUDIT · FOR COMPARISON, LHR T2: M&M'S 16.7 FACINGS PER SKU, CELEBRATIONS 31

THE RECOMMENDATIONS

What the audit told Mars Wrigley to do next

01 Close the gap to the European average

Mars Wrigley holds 17.8% of chocolate space across Europe and under 10% in Amsterdam. Moving the home hub towards the brand's own average is a significant space and assortment gain.

02 Rebuild M&M's position on the fixture

Toblerone and Lindt run at three to six times M&M's facings per SKU in the same store. The audit gives Mars Wrigley the evidence to reset its competitive position and the branding around it.

03 Lead the Chocolate category review

Amsterdam under-indexes at every level: confectionery, chocolate and brand. The data supports Mars Wrigley advising the retailer on a full chocolate category development plan.

ABOUT SHELFTRAK



Shelftrak turns a photo of any shelf, fixture or back bar into verified, SKU-level data on space, range, price and promotion — helping brands and retailers across travel retail, multi-sector retail and on-trade & hospitality see what's really happening in store. Through market tracking, bespoke audits and expert-led advisory, that data becomes a clear plan for growth.

More information and case studies can be found at shelftrak.com