

# ESPOSITO PASTA

Original & authentic



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# I. Presentation of our company (speech)

## 1. Canada : Metro Inc (annexe 1)

“Hello Ms Lavoie, thank you for welcoming me to Metro Inc. today. I am delighted to be able to present ESPOSITO PASTA, our company, our expertise and how our offering can fit into your strategy for developing premium and international products.

Founded in 1926, ESPOSITO PASTA is a French family business with nearly a century of expertise in traditional pasta production. Located in Tarbes, in the south of France, our 35-strong team has managed to retain a human-scale agility while developing an industrial capacity capable of meeting the demanding standards of international mass distribution. This longevity is the foundation of our identity: it guarantees our partners absolute control over manufacturing processes and consistency in production, two essential pillars for supporting the growth of a group such as Metro Inc.

Our positioning is resolutely premium, based on an uncompromising selection of durum wheat semolina and total traceability, from raw material to finished product. While our products are now highly sought after in Europe's finest delicatessens, they have also proven successful in supermarkets, particularly in the 'World Foods' section. This versatility proves our ability to satisfy customers looking for authenticity without sacrificing volume and deadline requirements.

To respond to new consumer habits, we have expanded our traditional range to include ready-to-use sauces and dishes, such as our flagship spaghetti bolognese and linguine arrabiata. These products combine the convenience expected by modern consumers with the distinctive flavour of an artisanal product. Thanks to our solid experience in exporting (Europe, Asia, Latin America), we offer proven logistical expertise, capable of managing complex flows and the most stringent international health standards.

ESPOSITO PASTA is a leading strategic partner in the development of your premium ranges, particularly through the 'Irresistibles' brand and your 'Gourmet Corner' concepts. We can support you through our own brand, a guarantee of French prestige, or as a supplier for your private labels. Our ambition is to contribute to the differentiation of Metro Inc.'s offering in Canada by providing a high-quality, authentic response to consumers' growing enthusiasm for European haute cuisine.”

## 2) Mexico : Grupo Herdez (annexe 2)

“Hello Ms. Gutierrez, thank you for visiting us today. I am delighted to welcome you to ESPOSITO PASTA and to introduce you to our company, our expertise and how our products can meet the expectations of your high-end customers in Mexico City.

Founded in 1926, ESPOSITO PASTA is a French family business that has been cultivating the art of traditional pasta for nearly a century. Now based in Tarbes, in the south of France, our small-scale structure (35 employees) allows us to combine Provençal authenticity with modern industrial requirements. Our production is based on a rigorous selection of durum wheat semolina and total traceability, guaranteeing a finished product of impeccable quality, already recognised by the best delicatessens in Europe.

Beyond our long-standing expertise in pasta, we have developed a range of traditional ready-to-use sauces (such as our Bolognese and Arrabbiata recipes). These products have been specifically designed to meet the challenges faced by chefs in high-end restaurants:

Operational efficiency : valuable time savings in the kitchen without compromising on quality.

Consistency : The guarantee of a consistent taste, essential for prestigious establishments.

Differentiation: The addition of a touch of ‘French gastronomy’ in a highly competitive Mexican market.

With solid international experience, particularly in Latin America (Argentina) and Asia, ESPOSITO PASTA has a thorough understanding of the logistical and health constraints associated with large-scale export. We understand the challenges facing GRUPO HERDEZ: enriching your catalogue for premium restaurants in Mexico City with exclusive products.

Our ambition is to become your strategic partner by offering you products that embody the alliance between French artisanal tradition and industrial reliability, in order to strengthen your positioning in the high-end segment in Mexico.”

## 3) South Africa : Woolworths (annexe 3)

“Hello Ms Botha, thank you for welcoming us today to Woolworths South Africa's headquarters. I am delighted to be able to present ESPOSITO PASTA, our expertise and how our offering can fit into your strategy for developing premium international dishes.

ESPOSITO PASTA, a French family business founded in 1926, embodies a century of expertise in the art of making traditional Mediterranean pasta and sauces. Based in Tarbes, in the south of France, our company has maintained a human-scale structure with 35 employees, a strategic choice that allows us to combine rigorous quality control with operational agility in response to the specific demands of our international partners. Our resolutely premium positioning is based on the use of excellent raw materials and total traceability, criteria that have enabled our products to establish a lasting presence in the most demanding delicatessens in Europe.

To precisely meet Woolworths South Africa's strategy of expanding its range of Italian-inspired ready-to-eat meals, we have developed a range of authentic recipes, such as our spaghetti bolognese and linguine arrabbiata, which combine modern convenience with traditional flavours. These culinary solutions are designed to satisfy an urban and sophisticated clientele looking for healthy, tasty and easy-to-prepare products. With solid experience in the Asian and Latin American markets, we have mastered all the logistical and health constraints associated with large-scale export, thus guaranteeing reliable delivery and full compliance with South African standards. By choosing ESPOSITO PASTA, Woolworths is securing a long-term partnership with a supplier capable of offering real differentiation in the high-end ready-to-eat segment, while capitalising on a strong brand image synonymous with tradition and culinary innovation.”

## II. Presentation our prospects

### 1. Metro Inc - Canada

Metro Inc. is a leading Canadian company operating primarily in the food distribution and pharmacy sectors. Headquartered in Montreal, Quebec, the company was founded in 1947 and has grown to achieve an annual revenue of over 22 billion CAD, supported by a workforce of more than 97,000 employees.

Metro Inc. operates across two main business sectors: food distribution (including grocery stores and supermarkets) and pharmacies. Its extensive store network consists of 1,000

food stores under various banners, such as Metro, Metro Plus, Super C, Food Basics, Adonis, Première Moisson, Marché Richelieu, Marché Ami, and Les 5 Saisons.

In terms of sales channels, 70% of sales occur in-store, while 30% are generated online through e-commerce and "click & collect" services. Notably, online sales grew by 19.8% in 2025, reflecting the company's increasing digital presence.

Financially, Metro Inc. maintains a gross margin of 20% of revenue. For 2026, the company has planned significant investments, including the opening of 12 new stores and a capital expenditure budget of 550 million CAD. Additionally, Metro Inc. is investing nearly 1 billion CAD in supply chain transformation, a project initiated in 2024.

The company's strategy focuses on several key areas : strengthening private labels such as *Irresistibles* and *Selection Merit*, expanding its store network through new openings and renovations, and driving product innovation with launches like eco-designed shredded cheeses and free-run eggs. Metro Inc. is also committed to corporate responsibility, with a 2022-2026 plan emphasizing sustainability, inclusion, and food waste reduction.

Metro Inc. offers a diverse range of products under its private labels, including *Irresistibles* (a premium range currently undergoing rebranding), *Selection Merit* (quality everyday products), and *My Healthy Plate (Mieux-être)*(organic and free-run eggs). The company also distributes food and pharmaceutical products from national and international brands.

Recent innovations include eco-designed packaging for shredded cheeses (2026) and the introduction of organic, gluten-free, and plant-based product lines.

The company is deeply committed to corporate social responsibility (CSR), focusing on reducing food waste and obtaining "Responsibly Sourced Product" certification for its private labels. It is also recognized for its diversity and inclusion efforts, ranking among Montreal's best employers and top employers for young graduates in 2025.

## 2. Grupo Herdez - Mexico

Grupo Herdez is a long-standing player in the Mexican agri-food industry, having been founded in 1914. With its headquarters in Mexico City, the company has grown to become one of the leaders in the processed food sector in Mexico and the United States, achieving a

turnover of \$1.9 billion in 2025. Grupo Herdez employs over 10,000 people and operates 10 factories and 9 distribution centers, ensuring a robust production and logistics infrastructure.

The company boasts an extensive product portfolio of over 600 products, spanning categories such as sauces, condiments (mayonnaise, ketchup), pasta, canned vegetables, ice cream, and organic products. Its iconic brands include Herdez, Barilla, McCormick, La Victoria, and Chi-Chi's.

Grupo Herdez distributes its products through multiple channels, including supermarkets, wholesalers, and the foodservice sector, particularly upscale restaurants in Mexico City such as El Jardín Secreto, La Table de France, and Casa de Campo. There is a strong demand for French products, which are perceived as synonymous with haute cuisine, especially in the sauces and condiments categories.

The company's market reach extends across Mexico and the United States, with distribution also facilitated through supermarkets, wholesalers, and exports. Grupo Herdez currently faces challenges such as standing out in a highly competitive market and finding high-end international suppliers, particularly from France, to enrich its product offerings and meet the expectations of its restaurant customers.

Grupo Herdez is involved in the manufacture and distribution of over 1,500 products, including sauces, condiments, pasta, canned vegetables, ice cream, and organic products. Its presence is significant: 90% of Mexican households consume its products, and it holds a leading market position in Mexico in categories such as tomato puree (70% market share), spices (10% market share), and mayonnaise (70% market share). Additionally, it is the leader in Central America for canned vegetables and is present in more than 20 countries outside Mexico.

As a family-owned company with over a century of history, Grupo Herdez has built a global presence in more than 20 countries, with a strong foothold in the United States and Central America. The company is known for its widerange of products, including sauces, pasta, ice cream, vegetables, and spices, as well as its commitment to innovation, regularly launching new products such as hummus and flavored tomatoes.

Grupo Herdez's solid infrastructure includes 10 factories and 9 distribution centers, enabling it to serve both the Mexican and international markets effectively. The company's core values revolve around people, community, and the planet.

Its main brands include Herdez (sauces, condiments, and traditional Mexican products), Barilla (pasta), and McCormick (spices and seasonings). Additionally, Grupo Herdez distributes international brands through partnerships, such as Betty Crocker, Cinnamon Toast Crunch, and Häagen-Dazs.

### 3. Woolworths – South Africa

Woolworths South Africa (WSA), established in 1931 and headquartered in Cape Town, is a prominent name in the South African retail landscape. Known for its premium positioning, the company has built a reputation akin to that of Marks & Spencer, catering primarily to affluent consumers with upper-middle to high incomes. For the 2025 financial year, Woolworths South Africa recorded an impressive annual turnover of 93.6 billion South African rands (ZAR), which translates to approximately €4.96 billion. The brand's core values—premium quality, freshness, innovation, and sustainability—are at the heart of its operations and customer appeal.

Woolworths South Africa boasts a robust network of 436 stores spread across the country, complemented by 161 Food Stops located at Engen service stations, making its products easily accessible to a wide range of customers. The company has been at the forefront of innovation, recently introducing initiatives that enhance the shopping experience. Among these is the Woolworths Food Emporium, a new premium store format launched in 2025, designed to offer an elevated retail experience. Another notable innovation is Woolies After Dark, a service that allows customers to order deliveries via Uber Eats until midnight, catering to those seeking convenience at all hours. Additionally, Woolworths has expanded its range of ready-to-eat meals, drawing inspiration from international cuisines, particularly Italian, to meet the evolving tastes of its discerning clientele.

Strategically, Woolworths South Africa is focused on diversifying its international suppliers to enrich its ready-to-eat meal offerings, with a particular emphasis on Italian and locally inspired flavors. The company is also dedicated to enhancing its "Gourmet Corner" range by introducing authentic, high-end products that align with its premium positioning. Woolworths' strengths lie in its commitment to product innovation, offering a variety of fresh, organic, halal, and vegetarian meals, as well

as its exceptional customer experience, supported by premium store environments, extensive delivery services, and strategic partnerships with brands like Uber Eats and Engen.

Sustainability is a cornerstone of Woolworths South Africa's operations. The company is actively engaged in initiatives aimed at reducing its environmental impact, such as the use of eco-friendly packaging and maintaining an ethical supply chain. Looking ahead, Woolworths has outlined its Vision 2025+, which prioritizes environmental stewardship, inclusion, and product traceability, ensuring that the brand continues to lead by example in the retail industry.

### III. Intercultural differences (Gapsmoov in Annex)

1) Canada:

France - Canada

|             | France  | Canada  | Advices from us   |
|-------------|---|---|---|
| INTERACTION | <ul style="list-style-type: none"> <li>- Direct relationships, seeking quick proximity</li> <li>- Personal and convivial bond prioritized before collaboration</li> <li>- Liking for debate and intense verbal exchange</li> </ul>                                | <ul style="list-style-type: none"> <li>- More reserved relationships, with an emphasis on professional distance</li> <li>- More transactional relationship, focused on efficiency and professional trust</li> <li>- More measured communication, valuing listening and silence</li> </ul> | <ul style="list-style-type: none"> <li>- Maintain professional distance</li> <li>- Avoid overly heated debates, prioritize listening</li> <li>- Communicate clearly, efficiently, and with a results-oriented focus</li> <li>- Build trust based on professionalism, not friendliness</li> <li>- They demonstrate attentiveness and thoughtfulness</li> </ul> |
| ARGUE       | <ul style="list-style-type: none"> <li>- Preference for oral and direct exchanges</li> <li>- More pronounced expression of emotions</li> <li>- Tendency toward implicit messages and nuances</li> </ul>   | <ul style="list-style-type: none"> <li>- Preference for written, more formalized communication</li> <li>- Strong self-control, measured and calm tone.</li> <li>- Clear, direct, and explicit communication</li> </ul>  | <ul style="list-style-type: none"> <li>- Formalize exchanges and decisions</li> <li>- avoid overly visible emotions</li> <li>- State things clearly, without hints or implications</li> <li>- Be logical, clear, and professional.</li> <li>- Politeness and precision are highly valued</li> </ul>   |
| NEGOTIATE   | <ul style="list-style-type: none"> <li>- Negotiation is sometimes characterized by debate or confrontation</li> <li>- Tendency toward improvisation, flexible in exchanges</li> <li>- More opportunistic approach, adapting according to the situation</li> </ul> | <ul style="list-style-type: none"> <li>- Seeking partnership and consensus</li> <li>- Thorough preparation and planning before negotiation</li> <li>- Legalistic approach, strict respect for procedures and agreements</li> </ul>  | <ul style="list-style-type: none"> <li>- Avoid confrontation, seek common agreement</li> <li>- Present well-structured arguments and documents</li> <li>- Follow established rules without improvisation</li> <li>- Demonstrate rigor and respect for commitments</li> </ul>  |
| DECIDE      | <ul style="list-style-type: none"> <li>- More centralized, hierarchical tendency</li> <li>- Exchange meetings, sometimes without immediate decisions</li> <li>- Preference for reflection, theory, and conceptualization</li> </ul>                               | <ul style="list-style-type: none"> <li>- Shared decision-making, empowering teams</li> <li>- Meetings focused on decision-making and action</li> <li>- Pragmatic orientation, seeking concrete and quick solutions</li> </ul>   | <ul style="list-style-type: none"> <li>- Involve teams in decision-making</li> <li>- Aim for concrete decisions and clear actions</li> <li>- Favor practical solutions over theory</li> <li>- Trust and delegate responsibilities</li> <li>- Demonstrate a results-oriented rather than conceptual approach</li> </ul>  |

## 2) Mexico :

|            |  |   |  |
|------------|--|---|--|
| COORDINATE | <ul style="list-style-type: none"> <li>- Importance of individual contribution</li> <li>- More flexible approach, time perceived as elastic</li> <li>- Evolving, adaptable plans and structures</li> </ul>             | <ul style="list-style-type: none"> <li>- Priority given to teamwork and cross-functional cooperation</li> <li>- Rigorous management, strict adherence to deadlines</li> <li>- Clear and structured planning from the outset</li> </ul>  | <ul style="list-style-type: none"> <li>- Promote teamwork and cooperation between departments</li> <li>- Strictly respect deadlines and organize time precisely</li> <li>- Plan projects from the outset with a clear structure</li> </ul>   |
| MOTIVATE   | <ul style="list-style-type: none"> <li>- Engagement is linked to the mission and sense of work</li> <li>- High standards, pursuit of perfection</li> <li>- Proactivity valued, taking initiative encouraged</li> </ul> | <ul style="list-style-type: none"> <li>- Motivation is more linked to duty and responsibility</li> <li>- More balanced approach, aiming for satisfactory results</li> <li>- Proactivity valued, taking initiative encouraged</li> </ul> | <ul style="list-style-type: none"> <li>- Promote teamwork and cooperation between departments</li> <li>- Strictly respect deadlines and organize time precisely</li> <li>- Communicate regularly on progress and share responsibilities</li> <li>- Aim for satisfactory results rather than absolute perfection</li> </ul> |

In conclusion, the cultural differences between France and Canada in the workplace highlight the need to adapt communication, decision-making, and management styles. In France, interactions are more oral, emotional, and individual-focused, while in Canada, the approach is structured, collaborative, and efficiency-driven. Successful collaboration requires respecting these differences and promoting clear, professional, and results-oriented communication.

**France - Mexico**

|                            | France  | Mexico  | Advices from us  |
|----------------------------|---|---|--|
| Coordination and structure | <ul style="list-style-type: none"> <li>- Structured meeting, straight to the point</li> <li>- Effectiveness and argumentative logic</li> <li>- Direct, frontal communication</li> </ul>                     | <ul style="list-style-type: none"> <li>- More flexible, possibility of adaptation</li> <li>- Respect for forms and mutual harmony</li> <li>- Indirect communication, avoid confrontation</li> </ul>                             | <ul style="list-style-type: none"> <li>- Do not get formal about a meeting format, adapt to their criteria while keeping a common thread in order to remain structured.</li> </ul>   |
| Decision making            | <ul style="list-style-type: none"> <li>- Centralized but important concrete opinions (expert, analyses)</li> <li>- Fast after analysis</li> </ul>   | <ul style="list-style-type: none"> <li>- strong hierarchical system: decision of the superior</li> <li>- Slower decision (personal relationship that influences - factual than France)</li> </ul>                               | <ul style="list-style-type: none"> <li>- If the decision takes time to arrive, do not restart things will happen but take longer</li> </ul>  |
| Relationships / proximity  | <ul style="list-style-type: none"> <li>- Separate professional and personal life (formal relationships)</li> <li>- Social distancing</li> <li>- Valorization of the skill and the content itself</li> </ul> | <ul style="list-style-type: none"> <li>- Essential person for business</li> <li>- Emotions at the heart of the negotiation. Lots of small talk.</li> <li>- Valuing the person and the relationship before competence</li> </ul> | <ul style="list-style-type: none"> <li>- Think about preparing small talks to build rapport, ask questions about personal life, don't be in a hurry to refocus the debate on negotiation</li> </ul>                          |
| Report on time             | <ul style="list-style-type: none"> <li>- Punctuality valued, respect for deadlines</li> <li>- Speed of execution</li> </ul>   | <ul style="list-style-type: none"> <li>- Flexible hours</li> <li>- More decision-making time</li> </ul>   | <ul style="list-style-type: none"> <li>- Stay on time as a matter of principle but do not be indignant if the other person is late.</li> </ul>   |
| Hierarchy and status       | <ul style="list-style-type: none"> <li>- Peer discussion</li> <li>- Challenge your interlocutor</li> </ul>  | <ul style="list-style-type: none"> <li>- Very marked hierarchy (seniority, title, status)</li> <li>- No questioning of the superior's word</li> </ul>   | <ul style="list-style-type: none"> <li>- Know before our arrival what the hierarchical status of each interlocutor is in order to know how to address each person and ask the right questions to the right people</li> </ul> |

- In conclusion, the differences between France and Canada mainly revolve around communication style, hierarchy, and collaboration. While the French often favor structured discussions, analytical reasoning, and clear debate, Canadians tend to value consensus, politeness, and open dialogue where everyone's opinion is considered. The professional environment in Canada encourages teamwork, inclusivity, and respect for individual contributions rather than rigid hierarchy. Adapting to this approach—by promoting collaboration, showing flexibility, and maintaining a respectful and positive tone—helps build trust and ensures more effective and harmonious professional relationships between the two countries.

**3) South Africa :**

France - South Africa

|              | France   | South Africa   | Advises from us  |
|--------------|--|--|--|
| Interact     | Proximity is present but always remains professional / Ease with words and verbal expression | Slightly more distance (especially between men and women), showing a polite, respectful, and trustworthy attitude / Ability to express oneself with words but also to master silence | Maintain professionalism and respect: adapt your communication style by observing how much personal space and formality are expected; avoid being too direct at first, and build trust gradually |
| To argue     | More comfortable in written form   | More comfortable in oral communication   | Prepare oral presentations and discussions carefully; use clear, structured arguments and avoid overloading with written documents; show confidence and clarity when speaking                    |
| To negotiate | Often uses power dynamics to assert oneself / More improvisational                           | Seeks to create collaboration between both parties so that each complements the other  | Favor a cooperative and inclusive negotiation approach; focus on long-term relationships rather than immediate results; listen actively and value the partner's contribution                     |
| To decide    | Tendency to pretend to deliberate while the decision is already made                         | Decision-making based on team discussion and action planning   | Be transparent in decision-making: involve partners in defining the plan of action; respect the collective aspect and ensure everyone feels included before concluding.                          |
| Coordinate   | Mix of individual contribution and teamwork / emphasis on planning                           | Stronger focus on teamwork and preparation of a clear plan   | Encourage collaboration and shared responsibility; clarify roles and objectives; make sure all team members agree on the plan before execution.  |
| To motivate  | Between perfectionism and satisfaction   | Slightly more on the side of contentment   | Recognize achievements and encourage motivation through positive reinforcement; avoid excessive criticism; highlight team spirit and the impact of collective success.                           |

- In conclusion, the differences between France and South Africa lie mainly in communication style, hierarchy, and teamwork: while the French tend to value logic, structure, and verbal spontaneity, South Africans place greater importance on respect, listening, and collaboration. Understanding and adapting to these cultural nuances helps build trust, promote smooth communication, and strengthen professional effectiveness between the two countries.

## IV. Market research

### 1) Canada :

| Elements                                 | Key Data   | Implication for PastaBox   |
|--|--|--|
| <b>Market size and Growth</b>            | Canadian sauce pasta market valued at ~3.05 B USD in 2024 and expected to grow steadily (CAGR ~2.9–3.4%) through 2030+ with both dried and fresh segments expanding. | Large, stable market with continued <b>growth</b> — opportunity for a premium imported product                             |
| <b>Consumption trend</b>                 | Canadians are increasingly seeking healthier, <b>convenient, and gourmet PastaBox offerings</b> (organic, whole-grain, plant-based).                                 | Align Pasta Box with trends (premium ingredients, health-oriented, convenience).   |
| <b>Import and competitive landscapes</b> | Imports of PastaBox products such as dried and stuffed sauces are sizable, with various origin countries and opportunities in value-added formats.                   | Imported PastaBox is already part of the market — premium European brands can differentiate with quality and storytelling. |
| <b>Consume preferences</b>               | Rise of culinary diversity, gourmet tastes, pasta appreciation, and demand for clean label products.   | Canadians like premium, diverse, and innovative sauces options (artisanal).  |
| <b>Distribution channels</b>             | Supermarkets, specialty retailers, and e-commerce are key channels. Retailers allocate shelf space for premium and innovative products                               | Focus on modern retail and online channels for premium pasta and sauce positioning.  |
| <b>Premium products opportunities</b>    | Fresh pasta and sauce seen as higher quality; growth of premium and specialty varieties  | Opportunity for premium pasta variants (special recipes, premium sauces, clean labels) to stand out.                       |
| <b>Price sensitivity</b>                 | While standard pasta is affordable, premium sauce commands higher prices among quality-seekers in urban/upper-income segments.                                       | A premium pricing strategy can work with clear value messaging.  |

## 2) Mexico :

| <u>Element</u>                | <u>Key Data</u>   | <u>Implications for Sauce for pasta</u>  |
|-------------------------------|---|--|
| <b>Market Size</b>            | 2,5 USD (2024), projected 3,25 USD in 2030                                | Growing market, opportunity for a differentiated product                             |
| <b>Per Capita Consumption</b> | 10,9kg/ year  | Mature market but openness to premium products                                       |
| <b>High-Growth Segments</b>   | Ready-to –eat, instant, premium/ organic sauce                            | Position sauce as convenient, premium and gourmet                                    |
| <b>Competition</b>            | Strong local competition, imports rising (+43%)                           | Need to highlight added value (French origin, unique recipes and packaging)          |
| <b>Distribution</b>           | Supermarkets, speciality stores or e-commerce                             | Opportunity to enter via e-commerce and urban distributors                           |
| <b>Consumer Trends</b>        | Convenience, speed, premium or artisanal products                         | Adapt recipes and packaging to local tastes, emphasize French image                  |
| <b>Market pricing</b>         | Local products: very affordable (0,48USD) BUT 1,5-2 USD (margin possible) | “Affordable premium” at 0,96 USD unit is attractive if value is clearly communicated |

|                      |   |   |
|----------------------|---|---|
| <b>Opportunities</b> | High- quality imported products, convenient packaging, European recipes | Create a storytelling: Made in France, practical, gourmet, eco friendly |
|----------------------|---|---|

KEY POINTS :

- Growing market: Mexican consumers are increasingly eating pasta and sauce, especially convenient and ready-to-eat options.
- Premium positioning: Your product stands out thanks to French origin and innovative packaging.
- Urban & digital segment: Focus on e-commerce and specialty stores in major cities.
- Adaptability: Possibility to develop flavors tailored to Mexican tastes to attract local consumers.
- Price justification: Emphasize quality, convenience, and French gourmet image to justify 0.96 €/unit.

3) South Africa :

| <u>Element</u>                | <u>Key Data</u>  | <u>Implications for PastaBox</u>   |
|-------------------------------|--|--|
| <b>Market Size</b>            | South Africa is one of the largest pasta markets in Africa and shows steady consumption growth as part of broader African trends where pasta consumption has increased 3.4% in 2024. South Africa is a significant importer among African countries. | A growing market with import demand offers space for a premium imported pasta product.                           |
| <b>Per Capita Consumption</b> | Average pasta consumption is 1.9 kg per person, lower than European levels but growing as urbanisation and convenience increase.   | Lower per capita consumption today suggests growth potential, especially in urban / middle-high income segments. |
| <b>High-Growth Segments</b>   | Ready-to-eat, instant, premium/ organic pasta  | Position PastaBox as convenient, premium and gourmet   |
| <b>Competition</b>            | South Africa has domestic pasta manufacturing, but imports and international brands are visible in retail. Competitive pricing from local brands exists, but imported premium products are visible on shelves.                                       | Differentiation will depend on quality, packaging, premium storytelling and positioning.                         |

|                        |  |  |
|------------------------|--|--|
| <b>Distribution</b>    | Supermarkets, specialty food retail, food service, and e-commerce channels are active. Imported European products are present in modern trade. | Leverage modern retail and e-commerce to position PastaBox as a premium European brand.                                  |
| <b>Consumer Trends</b> | Convenience, speed, premium or artisanal products  | Adapt recipes and packaging to local tastes, emphasize French image  |
| <b>Market pricing</b>  | The overall market includes lower-priced local brands and imports; premium segments are emerging as consumers become more quality-oriented     | Premium positioning with clear value messaging (quality, French origin, gourmet experience) can justify higher pricing.  |
| <b>Opportunities</b>   | Rising imports, urban consumers, middle class growth, interest in premium food   | Emphasize quality, convenience, unique recipe offerings, and strong brand story to gain share with a leader distributor. |

## V. Study of competitors

### 1) Mexico : Grupo Herdez

1 MXN ≈ 0,052 €

#### 1. Sigma Alimentos

Sigma is a large multinational food company with a strong presence in Mexico and international markets, reporting revenues of around €6.35 billion (approximately 121 billion MXN) in 2021, which makes it considerably larger than Grupo Herdez. Its most recent annual reports consistently show revenues in the multi-billion range, reflecting the company's scale and diversified geographic footprint. Sigma's core business is centered on refrigerated and frozen food products, including lunch meats, cheeses, yogurts, ready-to-eat and prepared meals, as well as selected beverages. This product mix positions Sigma strongly in categories that rely on cold-chain logistics, brand recognition, and frequent consumer purchases. From a market-positioning perspective, Sigma operates as a large-scale processor and distributor, competing through breadth of portfolio, manufacturing scale, and extensive distribution networks across supermarkets and convenience channels, both domestically and abroad. This contrasts with Grupo Herdez's more focused strength in shelf-stable categories such as canned goods, sauces, and condiments. In terms of pricing, Sigma's pasta and prepared meal offerings are generally positioned in the mid-range of supermarket pricing: they are typically comparable to, or slightly higher than, standard mass-market alternatives, reflecting added convenience and brand value. Retail prices usually fall in the range of approximately 80 – 150 MXN per dish, equivalent to about €4.2 – 7.8, making them accessible to a broad consumer base while still supporting margin through scale and brand differentiation.

## 2. Grupo Bimbo (Food Division)

Grupo Bimbo is one of the largest food companies in the world and the dominant player in the Mexican food industry, reporting revenues of approximately 348.9 billion MXN in 2021, equivalent to around €18.1 billion, which places it far above Grupo Herdez in terms of scale. The company is a global bakery leader, best known for its extensive portfolio of bread, pastries, snacks, and other baked goods, while also participating in the distribution of selected convenience food products in Mexico through its vast logistics network. From a market-positioning standpoint, Bimbo is recognized as the largest baked-goods company globally, benefiting from unmatched brand penetration, manufacturing capacity, and one of the most extensive distribution systems in the food sector. Unlike Herdez, pasta and ready meals are not a strategic focus for Bimbo; its involvement in these categories is indirect and typically limited to adjacent convenience foods or distribution partnerships rather than direct competition in pasta. In terms of pricing, Bimbo's products are generally positioned in the low-to-mid price range, particularly within its core bread and bakery categories, with typical retail prices ranging from approximately 20–60 MXN per item (around €1.0 – 3.1), reinforcing its mass-market appeal and everyday consumption positioning.

### 3. La Costeña (Food / Canned Foods)

La Costeña is a long-established Mexican food company, founded in 1923, that competes strongly in the canned and processed food segments, although it does not disclose revenue figures in the same transparent way as larger multinational groups. Despite this, it holds a significant position in Mexico's packaged food market, particularly in categories that often overlap directly with Grupo Herdez, such as sauces, vegetables, and other shelf-stable products. La Costeña's core portfolio includes canned chilis, beans, vegetables, sauces, and a wide range of processed everyday staples that are deeply embedded in Mexican household consumption. In terms of market positioning, the brand is widely recognized as a traditional and reliable player, with strong national distribution and a reputation for offering good value for money, often appealing to price-sensitive consumers. While La Costeña does not produce fresh or dry pasta, it plays an important complementary role in pasta and prepared meal consumption through its extensive range of sauces and canned accompaniments. These prepared sauces are typically positioned in the affordable to mid-range segment, with retail prices frequently falling between approximately 40 – 80 MXN, or about €2.1 – 4.2, making them accessible for everyday use and competitive against similar offerings from Herdez.

#### Ranking :

| RANK | COMPANY         | REVENUE (CAD)  | REVENUE (EUR) |
|------|-----------------|----------------|---------------|
| 1    | Grupo Bimbo     | ~348,887 M MXN | ~18,142 M €   |
| 2    | Sigma Alimentos | ~138,314 M MXN | ~7,192 M €    |
| 3    | La Costeña      | ~18,112 M MXN  | ~ 941 M €     |
| 4    | Grupo Herdez    | ~36,213 M MXN  | ~1,881 M €    |

#### 2) Canada : Metro Inc

1 CAD ≈ 0,61 EUR

#### 1. Loblaw Companies Limited

Loblaw Companies Limited is Canada's largest grocery retailer and one of the most influential players in the North American food retail sector, with reported revenues of

approximately 61 billion CAD, equivalent to around €37.2 billion. This scale gives Loblaw significant bargaining power with suppliers and a strong ability to shape consumer trends through pricing, promotion, and private-label development. The company operates an extensive network of retail banners across Canada, including Loblaws, Real Canadian Superstore, No Frills, and T&T Supermarket, each targeting different consumer segments, from price-sensitive shoppers to more premium and multicultural markets.

Strategically, Loblaw positions itself around breadth and flexibility, offering a wide assortment of products that ranges from basic everyday staples to higher-end and specialty items. A central pillar of this strategy is its strong private-label portfolio, particularly brands such as President's Choice, which emphasizes quality and innovation at accessible prices, and No Name, which targets the discount segment with simple, low-cost offerings. This multi-tier approach allows Loblaw to compete effectively across economic cycles while capturing a large share of household food spending.

In the prepared pasta and ready-meal category, Loblaw does not act as a producer in the traditional sense but exerts considerable influence through its private labels and in-store prepared food programs. Ready-made pastadishes and chilled or frozen meals sold under its store brands are typically positioned in the mid-range price segment, offering a balance between convenience, quality, and affordability. Retail prices generally range from around 8 to 12 CAD per unit, or approximately €5 – 7.3, depending on the banner and product positioning. These offerings compete directly with branded manufacturers by leveraging Loblaw's scale, shelf visibility, and strong consumer trust in its private labels, reinforcing its role as a key gatekeeper in the prepared meals market.

## 2. Empire Company Limited (Sobeys and affiliates)

Empire Company Limited, the parent company of Sobeys, is the second-largest supermarket group in Canada, reporting revenues of approximately 30.7 billion CAD, equivalent to around €18.7 billion. The company operates a diverse portfolio of retail banners, including Sobeys, Safeway, FreshCo, Foodland, and IGA, which allows it to address multiple consumer segments, from discount-oriented shoppers to more service- and quality-focused customers.

In terms of positioning, Empire emphasizes a balanced mix of fresh produce, strong private-label offerings, and competitive pricing, with a particular focus on fresh foods and in-store experience as key differentiators. Its private labels, such as Compliments and Panache, play an important role in reinforcing value and quality perceptions while supporting margin control. Although Empire is not a manufacturer, it significantly influences the

prepared meals and pasta category through its store brands and in-store ready-to-eat solutions.

Prepared pasta dishes and ready meals sold across Empire’s banners are generally positioned in the affordable to mid-range segment, reflecting the group’s value-driven yet quality-conscious strategy. Typical retail prices range from approximately 6 to 10 CAD per unit, or about €3.7 – 6.1, making these products slightly more accessible on average than those offered by Canada’s largest competitor, while still meeting consumer expectations for convenience and freshness.

### 3. Walmart Canada / Costco Canada

Walmart Canada and Costco Canada are two major players in the Canadian grocery and retail landscape, each generating an estimated revenue of around 25 billion CAD, equivalent to approximately €15.25 billion, from their Canadian operations. Although their business models differ, both exert strong competitive pressure on traditional supermarket chains through scale, pricing power, and high-volume sales.

Walmart Canada is positioned primarily as a low-price, everyday grocery and general merchandise retailer, focusing on affordability, broad assortment, and frequent shopping trips. Its grocery offering emphasizes national brands alongside value-oriented private labels, making it particularly attractive to price-sensitive consumers. In the prepared pasta and ready-meal segment, Walmart typically offers products positioned in the mid-range of the market, with prices generally around 8 – 12 CAD per unit (approximately €5 – 7.3), balancing convenience and value while remaining competitive with traditional supermarkets.

| RANK | COMPANY             | REVENUE (CAD) | REVENUE (EUR) |
|------|---------------------|---------------|---------------|
| 1    | Loblaw Companies    | ~61,000 M CAD | ~37,210 M €   |
| 2    | Empire Co. (Sobeys) | ~30,700 M CAD | ~18,727 M €   |
| 3    | Walmart Canada      | ~25,000 M CAD | ~15,250 M €   |
| 4    | Metro Inc.          | ~22,007 M CAD | ~13,424 M €   |

### 3) South Africa : Woolworths

ZAR ≈ 0.052 EUR .

### 1. Tiger Brands Limited

Tiger Brands is one of South Africa's largest and most established fast-moving consumer goods (FMCG) food producers, playing a central role in the country's packaged food market. Its portfolio spans a wide range of everyday staples, including dry pasta, sauces, grains, and ready-to-eat meals, which are designed to meet the needs of a broad consumer base. The company reported revenues of approximately 34.4 billion ZAR, equivalent to about €1.78 billion, underscoring its significant scale and influence within South Africa and selected regional markets.

From a strategic and market-positioning perspective, Tiger Brands is firmly oriented toward the mass-market segment, with a strong emphasis on value for money and affordability. The company focuses on delivering reliable, everyday food products that are accessible to middle- and lower-income households, supported by a strong national manufacturing footprint and an extensive distribution network that ensures wide availability across urban and rural areas. This positioning makes Tiger Brands a key provider of staple foods in the local market rather than a premium or niche player.

Pricing across its pasta and prepared meal categories reflects this value-driven approach. Dry pasta products are typically priced at around €1.90–2.90 per kilogram, keeping them competitive and affordable for regular household consumption. Ready-to-eat meals, which cater to convenience-oriented consumers, are usually priced between approximately €2.60 and €7.80 per dish, depending on portion size and level of preparation. Overall, Tiger Brands competes on scale, accessibility, and affordability, positioning itself as a dependable everyday food brand in South Africa's consumer goods landscape.

### 2. Pioneer Foods

Pioneer Foods (PepsiCo South Africa) is a major South African food manufacturer and a subsidiary of PepsiCo, with a strong presence in essential food categories such as pasta, grains, and convenient meal solutions. The company generates approximately 18.7 billion ZAR in revenue, equivalent to around €972 million, reflecting its significant scale within the South African food industry.

Pioneer Foods is clearly positioned in the mass-market segment, with a strategic emphasis on affordability, high volumes, and wide accessibility. Its product portfolio is designed to meet everyday consumer needs, making it particularly attractive to price-sensitive households. Distribution is a key strength, as Pioneer Foods products are widely available across major retail chains such as Shoprite and Pick n Pay, ensuring national coverage and high shelf visibility.

In the prepared and instant meals category, Pioneer Foods focuses on simple, functional, and competitively priced offerings rather than premium differentiation. Average retail prices typically range between €1.50 and €4.00 per unit, reinforcing the company's value-driven positioning and its role as a leading provider of affordable convenience foods in South Africa.

### 3. Premier FMCG

Premier FMCG is a large South African fast-moving consumer goods (FMCG) group specializing in essential food products, including pasta, flour, and other basic staples. The company generates approximately 18.6 billion ZAR in revenue, equivalent to around €967 million, highlighting its strong scale within the South African food manufacturing sector.

Premier FMCG is positioned firmly in the low-price, mass-market segment, with a strategic focus on essential, everyday food products rather than value-added or premium offerings. The company competes primarily on price competitiveness, leveraging efficient production and cost control to serve budget-conscious consumers. A key element of its strategy is its strong involvement in private-label production and budget brands, which reinforces its role as a cost leader within South African retail.

In the pasta and basic ready-meals category, Premier FMCG offers simple, functional products with limited differentiation, designed to meet basic nutritional needs at the lowest possible price. Average retail prices typically range between €1.50 and €3.10 per unit, underlining the company's positioning as a provider of affordable staple foods rather than convenience-oriented or premium solutions.

| RANK | COMPANY         | REVENUE (CAD)   | REVENUE (EUR) |
|------|-----------------|-----------------|---------------|
| 1    | Grupo Bimbo     | ~ 348,887 M MXN | ~18,142 M €   |
| 2    | Sigma Alimentos | ~138,314 M MXN  | ~7,192 M €    |
| 3    | La Costena      | ~18,112 M MXN   | ~941 M €      |
| 4    | Grupo Herdez    | ~36,213 M MXN   | ~1,881 M €    |

## VI. Recipe adaptation

### 1) Canada :

#### **Bolognese:**

**Carrot:** Carrot is commonly used in North American cuisine to add natural sweetness to sauces. Adding it to the bolognese helps soften the acidity of the tomato while enhancing the comforting and generous character of the dish. This approach matches North American preferences for rich, well-balanced, and accessible meals, often associated with home-style cooking.

#### **Arrabiata:**

**Espelette Pepper:** For the Canadian market, we chose to replace the classic chili pepper with Espelette pepper. This pepper is known for its subtle aroma and mild heat, making it more accessible to a population that is not generally accustomed to very spicy food. In addition, Espelette pepper has a premium and artisanal image, which fits well with the gourmet positioning sought in the Canadian market.

### 2) Mexico :

#### **Bolognese:**

**Jalapeño:** Mexican cuisine is traditionally spicier than European cuisine, with chili peppers used in everyday cooking. Adding jalapeño helps adapt the bolognese to local preferences

by providing a moderate but noticeable heat. Jalapeño is widely used in Mexico and offers a good balance between heat and fresh, vegetal flavor. The quantities have been carefully adjusted to enhance the sauce without overpowering the other ingredients, ensuring a balanced and accessible recipe.

#### **Arrabiata:**

**Coriander & Serrano Pepper:** Serrano pepper is a key ingredient in Mexican cuisine, hotter than jalapeño but used here in moderation. When combined with fresh coriander, which is very common in local gastronomy, it creates a contrast between heat and freshness. This pairing adds aromatic complexity to the sauce and is particularly well suited to the foodservice sector, where consumers seek new and authentic flavor experiences.

#### 3) South Africa :

#### **Bolognese:**

**Herbes de Provence & Rosemary:** South Africa has a culinary culture strongly influenced by spices, herbs, and aromatic blends, particularly through Cape Malay cuisine, which reflects European, African, and Asian influences. Adding Herbes de Provence combined with rosemary brings aromatic richness that aligns with local preferences for well-seasoned dishes while remaining accessible to a wide audience. Although rosemary is not a traditional herb in South African cuisine, it is widely recognized in international and Mediterranean cooking and perceived by consumers as a premium and familiar flavor. These herbs evoke a sunny, Mediterranean-style cuisine, often associated with quality and refinement in global ready-to-eat food markets. They enhance the complexity of the sauce without altering its core structure, making them suitable for a standardized product adapted to international consumers.

#### **Arrabiata:**

**Roscoff Onion:** Originally from France, more specifically from Brittany, Roscoff onion is known for its mild sweetness and strong flavor without being too sharp. Its use adds depth to the dish without altering its identity. Recognized for its balanced and gentle taste, Roscoff onion helps soften the natural heat of arrabiata sauce. In South Africa, consumers appreciate flavorful yet well-balanced dishes, where spices are not overly aggressive. This

choice also highlights a French-origin ingredient, reinforcing the premium and high-quality image of the exported product.

## VII. Packaging adaptation

### 1. Mexico

Aseptic flexible pouches (Bag-in-Box or professional pouch) specifically designed for Arrabbiata and Bolognese sauces, available in 1 kg formats, using a multi-layer flexible pouch, combined with aseptic or high-security pasteurized packaging.

This solution is ideal for export as it is lightweight, resistant, and optimized for transport costs, while being widely adopted in premium foodservice. It offers a long shelf life of 6 to 12 months, is hygienic and practical for professional kitchens, and is fully compatible with Made in France standards, with both processing and packaging carried out in France.

Beyond logistics and safety, this packaging is specifically chosen to preserve the original taste, texture, and aromatic profile of the sauces without any alteration. The aseptic or gentle high-security pasteurization process ensures food safety while respecting the natural thickness, color, and flavor balance of each recipe. This guarantees chefs a consistent, authentic sensory experience, comparable to freshly prepared sauces, fully aligned with the expectations of high-end and gourmet restaurants.

For the Mexican premium market, the visual identity is adapted with sober colors such as black, cream, and deep red, elegant typography avoiding an industrial look, and clear visible mentions such as “Sauce cooked in France” and “Authentic French artisanal recipe”.

### 2. South Africa

For the South African market, we recommend packaging that not only preserves the premium quality of our ready-to-eat pasta dishes (Arrabbiata and Bolognese) but also aligns with Woolworths’ strong sustainability values and consumer expectations.

The main packaging should consist of a high-quality box made from FSC-certified cardboard, ensuring the material is sourced from responsibly managed forests with full traceability throughout the supply chain. The cardboard is 100% recyclable and industrially compostable, supporting Woolworths' commitment to reducing environmental impact.

Inside the box, the product should be contained in a plant-based tray, made from materials such as cornstarch or other renewable fibers, completely avoiding plastic while maintaining the freshness, texture, and visual appeal of the pasta and sauce. The tray should be sealed with a compostable film made from PLA (polylactic acid) or cornstarch, certified "OK Compost" under European standards recognized in South Africa, ensuring the entire packaging can be composted after use.

All printing should use vegetable-based inks (e.g., soy or water-based) and solvent-free adhesives, minimizing the environmental footprint while maintaining a premium appearance.

### 3. Canada

For the Canadian market and specifically for Metro Inc, our ready-to-eat Arrabbiata and Bolognese pasta dishes are packaged in a premium, retail-ready format designed to preserve quality, freshness, and visual appeal.

The product is contained in a semi-rigid tray made from 100% recyclable PET, providing excellent protection for the pasta and sauce while maintaining taste, texture, and presentation. The tray is sealed with a transparent, hermetically sealable, compostable film, ensuring the product remains fresh, safe, and intact during transport, storage, and display in refrigerated shelves.

The tray is enclosed in an FSC-certified or recycled cardboard box, giving the product a premium look on store shelves while also being fully eco-responsible. The outer box can include a transparent window to showcase the pasta, with elegant, minimalist design and sober colors such as black, cream, and deep red.

This packaging is optimized for Metro Inc's refrigerated, ready-to-eat sections. By combining premium quality, practicality, and environmental responsibility, this

packaging ensures Canadian consumers experience authentic French pasta with confidence and satisfaction.

## VIII. Logistics

### Prices and incoterms:

#### Canada:

| Canada   |                     |                        |                   |        |        |
|--|---------------------|------------------------|-------------------|--------|--------|
| Liste des prix   |                     |                        |                   |        |        |
| Incoterms  | Quantité produits   | Quantité palettes      | Mode de transport | Prix   |        |
| EXW Tarbes   | 1200 - 4800 units   | 1-4 palettes           | Maritime          | 0,96 € | 0,96 € |
|  | 6000 - 18 000 units | 5-15 palettes          | Maritime          | 0,93 € | 0,93 € |
|  | > 24 000 units      | Full container         | Maritime          | 0,90 € | 0,90 € |
| Note: Emballage de la marchandise + remise documentaire. Acheteur 100% responsable de la marchandise |                     |                        |                   |        |        |
| FCA Port du Havre  | 750 - 3000 units    | Groupage export        | Maritime          | 1,08 € | 1,08 € |
|  | 3750 - 11250 units  | Préacheminement export | Maritime          | 1,04 € | 1,04 € |
|  | >24 000 units       | 20 - 40' container     | Maritime          | 1,00 € | 1,00 € |
| Note: Transfert de risque lors de la remise de la marchandise au transporteur                        |                     |                        |                   |        |        |
| DAP Mexico   | 750 - 3000 units    | Groupage maritime      | Maritime          | 1,49 € | 1,49 € |
|  | 3750 - 11250 units  | Maritime + camion LCL  | Maritime          | 1,37 € | 1,37 € |
|  | >24 000 units       | 40' HC                 | Maritime          | 1,29 € | 1,29 € |
| Note: Prise en charge de la responsabilité et support du coût jusqu'à l'usine acheteur               |                     |                        |                   |        |        |

#### Mexico:

| Mexique  |                    |                        |                   |        |        |
|--|--------------------|------------------------|-------------------|--------|--------|
| Liste des prix   |                    |                        |                   |        |        |
| Incoterms  | Quantité produits  | Quantité palettes      | Mode de transport | Prix   |        |
| EXW Tarbes   | 750 - 3000 units   | 1-4 palettes           | Maritime          | 2,13 € | 2,07 € |
|  | 3750 - 11250 units | 5-15 palettes          | Maritime          | 2,08 € | 2,02 € |
|  | >15 000 units      | Full container         | Maritime          | 2,02 € | 1,98 € |
| Note: Emballage de la marchandise + remise documentaire. Acheteur 100% responsable de la marchandise |                    |                        |                   |        |        |
| FCA Port du Havre  | 750 - 3000 units   | Groupage export        | Maritime          | 2,26 € | 2,20 € |
|  | 3750 - 11250 units | Préacheminement export | Maritime          | 2,21 € | 2,15 € |
|  | >15 000 units      | 20 - 40' container     | Maritime          | 2,16 € | 2,11 € |
| Note: Transfert de risque lors de la remise de la marchandise au transporteur                        |                    |                        |                   |        |        |
| DAP Mexico   | 750 - 3000 units   | Groupage maritime      | Maritime          | 2,72 € | 2,66 € |
|  | 3750 - 11250 units | Maritime + camion LCL  | Maritime          | 2,58 € | 2,62 € |
|  | >15 000 units      | 40' HC                 | Maritime          | 2,45 € | 2,54 € |
| Note: Prise en charge de la responsabilité et support du coût jusqu'à l'usine acheteur               |                    |                        |                   |        |        |

#### South Africa:

| Afrique du Sud   |                     |                        |                   |        |        |
|--|---------------------|------------------------|-------------------|--------|--------|
| Liste des prix   |                     |                        |                   |        |        |
| Incoterms  | Quantité produits   | Quantité palettes      | Mode de transport | Prix   |        |
| EXW Tarbes   | 1200 - 4800 units   | 1-4 palettes           | Maritime          | 0,96 € | 0,96 € |
|  | 6000 - 18 000 units | 5-15 palettes          | Maritime          | 0,93 € | 0,93 € |
|  | > 24 000 units      | Full container         | Maritime          | 0,90 € | 0,90 € |
| Note: Emballage de la marchandise + remise documentaire. Acheteur 100% responsable de la marchandise |                     |                        |                   |        |        |
| FCA Port du Havre  | 750 - 3000 units    | Groupage export        | Maritime          | 1,05 € | 1,05 € |
|  | 3750 - 11250 units  | Préacheminement export | Maritime          | 1,01 € | 1,01 € |
|  | >24 000 units       | 20 - 40' container     | Maritime          | 0,98 € | 0,98 € |
| Note: Transfert de risque lors de la remise de la marchandise au transporteur                        |                     |                        |                   |        |        |
| DAP Mexico   | 750 - 3000 units    | Groupage maritime      | Maritime          | 1,32 € | 1,32 € |
|  | 3750 - 11250 units  | Maritime + camion LCL  | Maritime          | 1,22 € | 1,22 € |
|  | >24 000 units       | 40' HC                 | Maritime          | 1,15 € | 1,15 € |
| Note: Prise en charge de la responsabilité et support du coût jusqu'à l'usine acheteur               |                     |                        |                   |        |        |

### Delays of delivery:

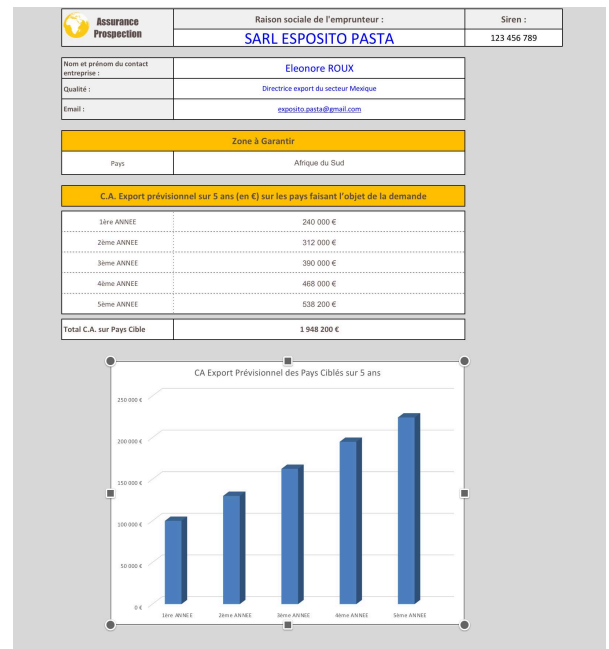
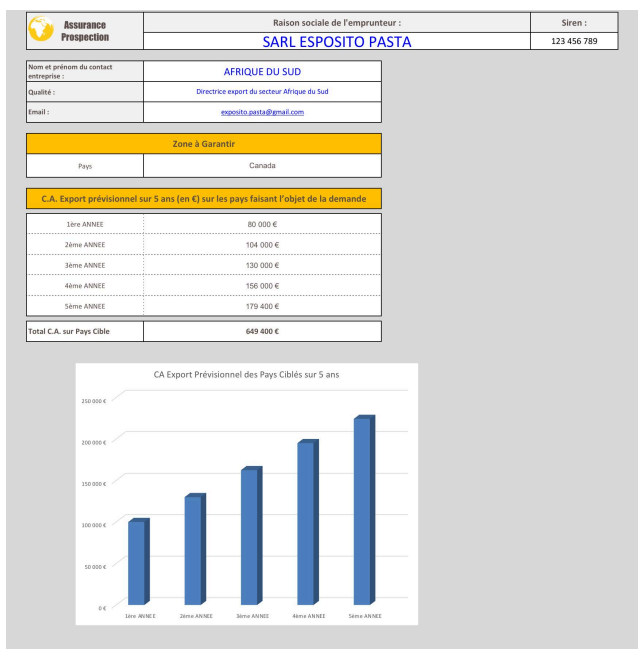
Delivery timelines vary depending on the destination country and the chosen mode of transport.


For Canada, two transport options are available. Maritime shipping takes approximately 17 to 32 days after the start of the contract and is the preferred solution for long-term partnerships due to its cost efficiency. For initial orders or small quantities such as product samples, air freight can be used, with delivery times ranging from 5 to 8 days. Express shipping is also possible for urgent shipments.

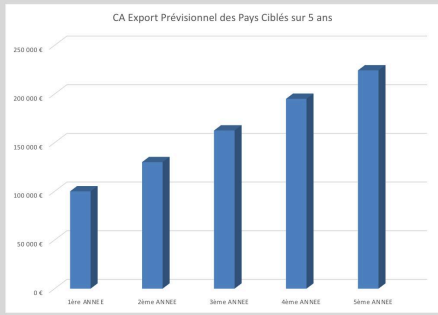
In Mexico, maritime transport requires approximately 20 to 35 days of delivery. For samples or small quantities intended for product testing or tasting, express services such as DHL can be used to ensure faster delivery.

For South Africa, maritime transport is the only viable option, as the prospective partner follows a sustainable logistics approach. Delivery times are longer, ranging from 35 to 50 days, mainly due to extensive and time-consuming documentation requirements.

## IX. Export plan



|  |  |         |
|--|--|---------|
|  <b>Assurance Prospection</b> | Raison sociale de l'emprunteur :                                       | Siren : |
|  | <b>SARL ESPOSITO PASTA</b>   |         |
| Nom et prénom du contact entreprise :  | <b>Eleonore ROUX</b>   |         |
| Qualité :  | Directrice export du secteur Mexique                                   |         |
| Email :  | <a href="mailto:esposito.pasta@gmail.com">esposito.pasta@gmail.com</a> |         |
| <b>Zone à Garantir</b>   |  |         |
| Pays   | Mexique  |         |
| <b>C.A. Export prévisionnel sur 5 ans (en €) sur les pays faisant l'objet de la demande</b>                    |  |         |
| 1ère ANNEE   | 100 000 €  |         |
| 2ème ANNEE   | 130 000 €  |         |
| 3ème ANNEE   | 162 500 €  |         |
| 4ème ANNEE   | 195 000 €  |         |
| 5ème ANNEE   | 224 250 €  |         |
| <b>Total C.A. sur Pays Cible</b>   | <b>811 750 €</b>   |         |

| Année      | CA Export Prévisionnel (€) |
|------------|----------------------------|
| 1ère ANNEE | 100 000                    |
| 2ème ANNEE | 130 000                    |
| 3ème ANNEE | 162 500                    |
| 4ème ANNEE | 195 000                    |
| 5ème ANNEE | 224 250                    |

## X. Norms and regulations

### 1) Canada :

All food imported into Canada must comply with the Safe Food for Canadians Act (SFCA) and the Safe Food for Canadians Regulations (SFCR), ensuring food safety and consumer protection. Importers must demonstrate full traceability and implement a preventive control plan. Mandatory labelling must be provided in both English and French and include the common product name, complete list of ingredients, net quantity, name and address of the Canadian seller or importer, declaration of priority allergens, Nutrition Facts table, shelf life, and country of origin. Import documentation includes a commercial invoice, packing list, certificate of origin, health certificates or attestations depending on ingredients, and import declarations with the importer's SFC licence number. Canadian buyers often require high quality standards or certifications, formulations and labelling adapted to the local market, proof of traceability, complete HACCP plans, and nutritional data presented according to Canadian standards.

## 2) Mexico :

In Mexico, compliance with labelling and mandatory information is essential for importing food products. Labels must follow NOM-050-SCFI-2004 for general commercial information and NOM-051-SCFI/SSA1-2010 for pre-packaged food products. Required elements include the product name, list of ingredients, net quantity, name and address of the responsible party or importer, country of origin, batch number, use-by date, nutritional information when health or nutritional claims are made, and specific storage instructions such as refrigeration. All information must be written in Spanish, be clearly legible, and comply with technical standards. Before importation, a “constancia de conformidad” must be obtained to certify that labelling complies with NOM-051. Mexico also requires strict food safety measures, including Good Hygiene and Manufacturing Practices, traceability, and contamination risk reduction. Grupo Herdez relies on ISO 22000 or FSSC 22000 standards to guarantee food safety, which facilitates compliance with authorities and business partners. Customs procedures require a complete commercial invoice, certificate of origin proving EU manufacture, the constancia de conformidad, and possibly technical data sheets or analyses for products with specific characteristics. Working with a local importer or representative is strongly recommended to manage COFEPRIS and customs procedures.

## 3) South Africa :

4)

In South Africa, food labelling must include the product name, a complete list of ingredients in descending order by quantity, net weight or volume in metric units, name and address of the local importer or distributor, country of origin for imported products, manufacturing date and expiry date or minimum shelf life, batch number, detailed nutritional information, and clearly identified allergens such as gluten, dairy, or eggs. Labels must be clear, not misleading, and written in English, the most commonly used commercial language for imported food products. For food safety and quality, it is strongly recommended to implement management systems such as HACCP, ISO 22000, or BRC as proof of control over the production process. Import

documentation generally includes a commercial invoice, packing list, certificate of origin, health certificates or attestations depending on the product, and any documents required by the South African Bureau of Standards or the local importer. Additional requirements often include full ingredient traceability, food safety certifications, regular supplier audits, strict compliance with local labelling regulations, and a clear policy on quality, sustainability, and transparency.

## XI. Quote

Exemple of quote for Canada (the others in the annex) :

ESPOSITO PASTA

QUOTE

24 rue du Faubourg Saint-Honoré  
65000 Tarbes  
01 40 17 46 00  
<https://www.espositopasta.com/fr>

Reference : DEV - 07699  
Date : 23/01/2026  
N° customer : 23990

Metro Inc  
Bd Maurice-Duplessis  
11555 Montréal, CANADA

Title : Bolognese and Arrabiata Pasta Box

| Quantity | Designation  | Unit price excluding tax | Total price excluding tax |
|----------|--|--------------------------|---------------------------|
|          | Bolognese Spaghetti Pasta and Sauce<br>Reference : H063761S 22 |                          |                           |
|          | Arrabiata Linguine Pasta and Sauce<br>Reference : D076490D 34  |                          |                           |
|          | Sauce Bolognese<br>Reference : G098368F 32                     |                          |                           |
|          | Sauce Arrabiata<br>Reference : G098368F 33                     |                          |                           |

**Total excluding tax (€) :**

We remain at your disposal for any additional information.  
Cordially,

If this quote suits you, please return it to us signed preceded by the mention :  
« GOOD FOR THE CORDIAL AND EXECUTION OF THE ESTIMATE »

Date :

Signature :

Validity of the quote: 3 months

Payment terms: 40% upon order, balance upon delivery  
Any amount not paid by its due date shall automatically incur late payment interest at three times the legal interest rate for the current year, as well as the payment of €40 in collection costs.

## XII. Invoice

Exemple of Invoice for Canada (the others in the annex) :

**INVOICE N°07699**

ESPOSITO PASTA  
24 rue du Faubourg Saint-Honoré  
65000 Tarbes  
SIREN 572 076 396  
01 40 17 46 00

Metro Inc  
Bd Maurice-Duplessis  
11555 Montréal, CANADA

Date of invoice : 23/01/2026  
Date of delivery : 23/02/2026  
Payment deadline : 23/02/2026

| Quantity | Designation   | Unit price excluding tax |
|----------|---|--------------------------|
|          | Bolognese Spaghetti<br>Pasta and Sauce<br>Reference : H063761S 22   |                          |
|          | Arrabiata Linguine<br>Pasta and Sauce<br>Reference :<br>D076490D 34 |                          |
|          | Sauce Bolognese<br>Reference :<br>G098368F 32                       |                          |
|          | Sauce Arrabiata<br>Reference :<br>G098368F 33                       |                          |

**Total Excluding tax :**

Additional informations (BIC, IBAN)

SOGEAGGP - FR46 5678 5432 4567 6788

In case of delay, a penalty at the annual rate of 5% will be applied, to which will be added a flat-rate compensation for collection costs of 40%.

### XIII. Missions of each :

| Liste   | Qui ?     |
|---|-----------|
| Présenter notre entreprise                        | Marie-Lou |
| Présenter notre prospect                          | Naelle    |
| Brochure  | Naelle    |
| Différence culturelles (gapsmoov)                 | Romane    |
| Infos pays + étude de marché                      | Eléonore  |
| Adapter recette                                   | Marie-Lou |
| Adapter packaging + étiquette                     | Naelle    |
| Voir transport / délai / logistique (3 incoterms) | Eléonore  |
| Préparer devis/ contrat                           | Romane    |
| Voir prix final du produit                        | Toutes    |
| Concurrents                                       | Marie-Lou |
| Normes et reglementations                         | Romane    |
| Carte de visite                                   | Marie-Lou |
| Plan export                                       | Toutes    |

## XIV. Annexes

### Presentation of our company (speech)

#### 1) Canada : Metro Inc

# ESPOSITO PASTA

## COMPANY IDENTITY

- Origin : France
- **Family-owned business**
- **Founded** : 1926
- **Nearly 100 years expertise**
- **Core values** : authenticity, consistency, premium, reliability

## HERITAGE & BRAND DNA

- Traditional recipes **passed down through generations**
- **Strong family heritage**
- **Proven mastery of production processes**
- **Long-term consistency, essential for large-scale retail partners**

## PRODUCTION SITE & STRUCTURE

- **Production site** : Tarbes (South of France)
- **Employees** : 35
- **Human-scale company**
  - Controlled production
  - Consistent quality
  - Reliable lead times
  - Ability to meet retail volume & logistics requirements

## PRODUCT OFFERING

- Pasta
- Ready-to-use sauces and ready-to-eat meals
- Key products:
  - Spaghetti Bolognese
  - Linguine Arrabbiata
- Benefits:
  - Authentic recipes
  - Convenience for consumers
  - Consistent taste at scale

## PREMIUM POSITIONING & QUALITY STANDARDS

- Premium positioning based on ingredient quality
- Carefully selected durum wheat semolina
- Full traceability
- High production standards aligned with modern retail expectations

## EXPORT EXPERTISE

- Active markets : Europe, Asia, Latin America
- Strong expertise in:
  - International logistics
  - Food safety regulations
  - Delivery timelines
  - Supply chain management for structured retail networks

## UNDERSTANDING OF METRO INC.'S STRATEGY

- Expansion of premium and international ranges
- Focus on concepts such as "Irresistibles" and "Gourmet Corner"
- Growing consumer interest in French and Italian products in Canada

## VALUE PROPOSITION FOR METRO

- Authentic French brand with premium European positioning
- Option to work as:
  - Branded supplier, or
  - Private label (MDD) partner
- Reliable volumes and consistent quality
- Strong fit with Metro's premium and gourmet strategy

## VISION & PARTENERSHIP

- Long-term collaboration
- Stable, reliable, and regular supplier
- Ability to support range development and category growth
- Contribution to Metro's premium and international differentiation

CANADA

## 2) Mexico : Grupo Herdez

# ESPOSITO PASTA

### COMPANY IDENTITY

- Origin : France
- **Family-owned business**
- **Founded** : 1926
- Nearly **100 years expertise**
- Core values : **tradition, authenticity, quality, reliability**

### HISTORY & BRAND DNA

- Traditional recipes **passed down through generation**
- **Strong family heritage**
- A true guarantee of **authenticity & craftsmanship**

### PRODUCTION SITE & COMPANY SIZE

- **Production site** : Tarbes (South of France)
- **Employees** : 35
- **Human-scale company**
  - strict quality control
  - High flexibility
  - Ability to adapt to partners' specific needs

### PRODUCT OFFERING

- **Core Expertise** : traditional pasta
- Strategic development :
  - **Ready-to-use sauces**
  - Designed for **foodservice & professional kitchens**
- Key Product : Spaghetti Bolognese, linguine Arrabiata
- Benefits :
  - time saving
  - consistent taste & quality
  - Perfect for **fine dining restaurants**

### POSITIONING & QUALITY COMMITMENT

- **Premium positioning**
- Inspired by **Provençal authenticity**
- Use of **carefully selected product**
- **Full traceability** :
  - Raw materials
  - Production process
  - Finish products
- Strong reputation in **demanding markets**

### EXPORT EXPERTISE

- Strong international experience
- Active markets:
  - Europe
  - Asia
  - Latin America (notably **Argentina**)
- Expertise in:
  - International logistics
  - Sanitary and regulatory requirements
  - Quality standards for export markets

### MARKET PRESENCE & DISTRIBUTION

- Distributed in :
  - Leading **gourmet stores** in France
  - High-end retailer across Europe
- Proof of recognition and trust

### UNDERSTANDING OF THE MEXICAN MARKET

- Highly competitive market
- Strong and positive image of **French gastronomy**
- Sauces and condiments play a **key role in fine dining**
- Growing demand for **authentic, premium European products**

### VISION & PARTENERSHIP

- Long-term partnership approach
- Ability to :
  - Adapt products to the Mexican market
  - Support the development of French gastronomy in Mexico
- A strong combinaison of : tradition, equality & export reliability

### 3) South Africa : Woolworths

## ESPOSITO PASTA

#### COMPANY IDENTITY

- Origin : France
- **Family-owned business**
- **Founded** : 1926
- **Nearly 100 years expertise**
- **Core values** : tradition, premium quality, authenticity & reliability

#### HERITAGE & BRAND DNA

- Traditional recipes **passed down through generation**
- **Strong family heritage**
- Inspired by **Mediterranean & Italian gastronomy**
- Long-standing commitment to **craftsmanship & consistency**

#### PRODUCTION SITE & STRUCTURE

- **Production site** : Tarbes (South of France)
- **Employees** : 35
- **Human-scale company**
  - Full control production
  - High responsiveness to partners
  - Flexibility to adapt products to local

#### PRODUCT OFFERING

- **Core Expertise** : traditional pasta
- Strategic development :
  - **Ready-to-eat meals**
  - **Italian & Mediterranean inspired recipes**
- **Key Product** : Spaghetti Bolognese, linguine Arrabiata
- **Benefits** :
  - Authentic flavors
  - Consistent quality
  - Convenient & ready to consume
  - Suitable for premium-meal segment

#### POSITIONING & QUALITY STANDARDS

- **Clear Premium positioning**
- Inspired by **Provençal authenticity**
- Carefully selected ingredients
- **Full traceability**
- **High quality standards aligned with premium retail chains**
- Products already distributed in :
  - Leading **gourmet stores** in France
  - High-end retailer across Europe

#### EXPORT EXPERTISE

- Strong international experience
- Active markets : Europe, Asia, Latin America
- Expertise in:
  - International logistics, food safety & local market adaptation
  - Proven fit premium international retail standards

#### SUSTAINABILITY & WASTE AWARENESS

- Optimised to limit food waste
- Consistent recipes reducing losses
- Ready-to-eat formats supporting portion control
- Openness to sustainable & optimize packaging solutions

#### STRATEGIC FIT WITH WOOLWORTHS SOUTH AFRICA

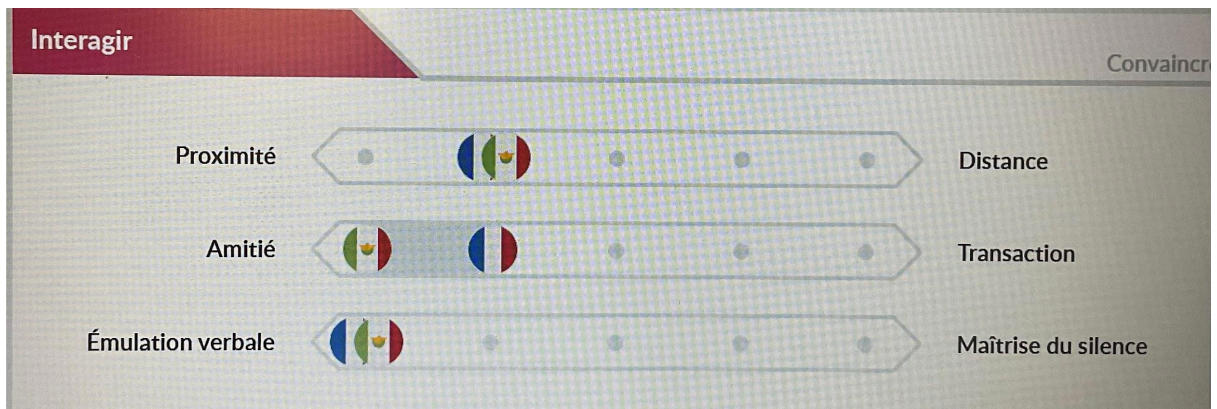
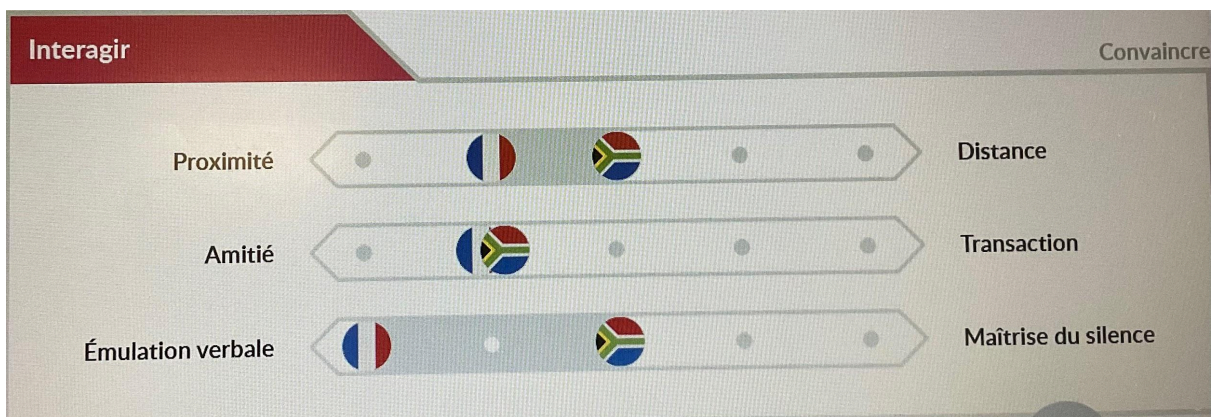
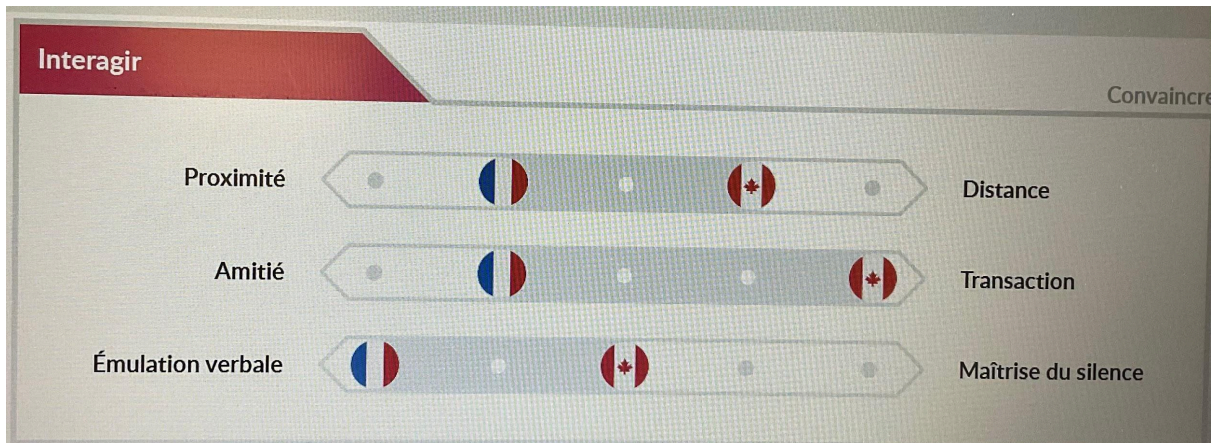
- Authentic French, Italian-inspired premium ready-to-eat products
- Strong brand heritage aligned with WSA's premium positioning
- Designed for quality-driven consumers seeking authenticity, convenience, & innovation
- Consistent quality at scale with a focus on sustainability and waste reduction

#### VISION & PARTNERSHIP

- Long-term collaboration
- Product and format adaptation for the South African market
- Reliable, premium, export-ready partner

South Africa

Gapsmoov :



## Brochure : Canada

### DELICIOUS PASTA MADE FOR CANADA

DESIGNED FOR THE CANADIAN MARKET, OUR PASTA PRODUCTS REFLECT FRENCH CRAFTSMANSHIP AND HIGH-QUALITY INGREDIENTS.

MADE ENTIRELY IN FRANCE, THEY ENSURE PREMIUM QUALITY, CONSISTENCY, AND AUTHENTIC TASTE.

OUR BOLOGNESE AND ARRABIATA PASTE OFFER A REFINED EUROPEAN TOUCH, COMBINING SIMPLICITY, FLAVOR, AND RELIABILITY TO MEET THE EXPECTATIONS OF THE CANADIAN MARKET.

### CLASSIC BOLOGNESE RECIPE



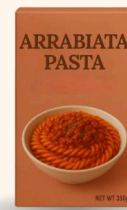
SPAGHETTI  
BOLOGNESE SAUCE  
BEEF  
SALT & PEPPER  
CAROT



### CLASSIC ARRABIATA RECIPE



LINGUINE  
ARRABIATA SAUCE  
GARLIC  
CHILI FROM ESPELETTE



FOR NEARLY A CENTURY, ESPOSITO PASTA HAS BEEN CRAFTING PREMIUM PASTA AND SAUCES INSPIRED BY **PROVENÇAL TRADITION**. A FAMILY-OWNED COMPANY WITH 35 DEDICATED ARTISANS, WE ENSURE **CONSISTENT QUALITY** AND **FULL TRACEABILITY** ACROSS OUR RANGE.

TRUSTED BY **LEADING FRENCH RETAIL CHAINS** SUCH AS CARREFOUR, E.LECLERC, INTERMARCHÉ, AND MONOPRIX, WE REPRESENTS THE **EXCELLENCE OF FRENCH CULINARY HERITAGE** THROUGH REFINED FLAVORS.

### CONTACT

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### WHERE TO FIND US ?

24 RUE DU FAUBOURG SAINT  
HONORÉ, 65000 TARBES

[WWW.ESPOSITOPASTA.COM](http://WWW.ESPOSITOPASTA.COM)



# ESPOSITO PASTA

Original & authentic

## Brochure : Mexico

### DELICIOUS SAUCES MADE FOR MEXICO

DESIGNED FOR THE MEXICAN MARKET, OUR SAUCES COMBINE FRENCH CULINARY EXPERTISE WITH RICH AND INTENSE FLAVORS.

MADE ENTIRELY IN FRANCE, THEY GUARANTEE PREMIUM QUALITY.

THE BOLOGNESE AND ARRABIATA SAUCES OFFER AUTHENTIC TASTE AND A REFINED EUROPEAN TOUCH, PERFECTLY SUITED TO THE EXPECTATIONS OF A DYNAMIC AND DEMANDING MEXICAN MARKET.

### CLASSIC BOLOGNESE RECIPE



BOLOGNESE SAUCE

BEEF

SALT & PEPPER

JALAPENOS



### CLASSIC ARRABIATA RECIPE



ARRABIATA SAUCE

GARLIC

CHILI

CILANTRO

SERRANO CHILI



FOR NEARLY A CENTURY, ESPOSITO PASTA HAS BEEN CRAFTING PREMIUM PASTA AND SAUCES, INSPIRED BY **TRADITIONAL PROVENÇAL EXPERTISE**. OUR FAMILY-OWNED BUSINESS, WITH A TEAM OF 35 PASSIONATE ARTISANS, IS DEDICATED TO CREATING PRODUCTS THAT COMBINE **AUTHENTICITY, QUALITY, AND TRADITION**.

WE ENSURE **CONSISTENT QUALITY** AND **FULL TRACEABILITY** FOR EVERY PRODUCT, WHETHER FRESH, DRIED PASTA, OR READY-TO-USE SAUCES. ESPOSITO PASTA EMBODIES **FRENCH CULINARY HERITAGE**, OFFERING REFINED FLAVORS.

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# ESPOSITO PASTA

Original & authentic

## Brochure : South Africa

### DELICIOUS PASTA MADE FOR SOUTH AFRICA

**READY-TO-EAT PASTA RECIPES**, INCLUDING SPAGHETTI BOLOGNESE AND LINGUINE ARRABIATA, MADE WITH CAREFULLY SELECTED INGREDIENTS SUCH AS BEEF, TOMATOES, OLIVE OIL, GARLIC, AND ONIONS, DELIVERING **AUTHENTIC MEDITERRANEAN FLAVOURS** ADAPTED TO SOUTH AFRICAN TASTES.

PRESENTED IN **RESPONSIBLE PACKAGING** (FSC-CERTIFIED CARDBOARD), USING **RECYCLABLE AND COMPOSTABLE MATERIALS** IN LINE WITH CURRENT ENVIRONMENTAL STANDARDS.

### CLASSIC BOLOGNESE RECIPE



SPAGHETTI  
BOLOGNESE SAUCE  
THYME  
ROSEMARY  
HERBES DE PROVENCE  
BEEF  
SALT & PEPPER



### CLASSIC ARRABIATA RECIPE



LINGUINE  
ARRABIATA SAUCE  
OLIVE OIL  
GARLIC  
CHILI  
ROSCOFF'S ONIONS



FOR NEARLY A CENTURY, ESPOSITO PASTA HAS BEEN CRAFTING PREMIUM PASTA AND SAUCES, INSPIRED BY **TRADITIONAL PROVENÇAL EXPERTISE**. OUR FAMILY-OWNED BUSINESS, WITH A TEAM OF 35 PASSIONATE ARTISANS, IS DEDICATED TO CREATING PRODUCTS THAT COMBINE **AUTHENTICITY, QUALITY, AND TRADITION**.

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