

Claude3 Opus Sales Report
Beverages, '18-07 vs '18-08
Prepared: 09 April 2024

This report uses charts designed according to the International Business Communication Standards (IBCS) to ensure clarity, consistency, and information density.

Key elements:

1. **Consistent chart design:** All charts follow a uniform design, making it easier for readers to understand and compare data across different visualizations. This includes consistent use of fonts, sizes, and positioning of elements.
2. **Simplified and focused content:** Charts are designed to be easily readable, with a focus on essential information. Unnecessary decorative elements are avoided to maintain clarity.
3. **Proper labeling and titling:** Each chart includes clear, descriptive titles and labels to ensure that the data is easily understood without additional context.
4. **Standardized notation:** IBCS-compliant charts use standardized notation for elements such as time periods, units, and scenarios, making the information more accessible and comparable.

The following conventions are used throughout the report:

- **Black** represents actual values for the current year
- **Grey** represents data from the previous year
- **Red** indicates negative or "bad" performance
- **Green** indicates positive or "good" performance
- **"PY"** is used to denote the previous year values
- **"AC"** refers to the actual current year values
- **Underscore "_"** is used to represent year-to-date data
- **Tilde "~"** indicates a rolling year or 12-month period

Executive summary

Index

At a glance

Sales breakdown

Data insights

Trends

Backup

Market Overview

The Eurasian beverage market is thriving, with the Drinks category leading sales, particularly in Alcohol and non-promotional offerings. Growth is driven by volume and product mix rather than pricing. Convenience is the top-performing channel, and while most chains are growing, Lidl and Aldi face declines. Walmart and Carrefour stand out, especially in Drinks. However, the market faces challenges in Food, Beer, and certain regions like France.

Sales Performance

Italy, the USA, Switzerland, and France are the top countries for beverage sales, with growth rates varying from -3.0% to 9.0%. Drinks outperform Food, and non-promotional items generate higher revenue in both categories. Alcohol and Wine have the highest unit prices and sales, while Confectionary sees high volume across channels, particularly in Maxi.

Product and Company Insights

Chocolate and Treats lead in volume, while Liquor commands premium prices and strong growth. Class A companies dominate, contributing 80% of sales despite being only 40% of the total. The market is well-distributed across regions, with Italy, the USA, Switzerland, and France as top performers. Alcohol leads in sales but ranks third in units sold, likely due to higher prices. The market shows varying relationships between unit price change and unit growth rate across brands and subcategories.

Market Performance

From July to August 2018, the market experienced a 5.2% increase in average unit price and 6.4% growth in total sales, driven by strong promoted sales growth and positive performance in the Nord, Sud, and Centro regions. Penny's sales grew an impressive 30.7%, while Convenience and Super channels showed the most significant growth among retail formats. Despite some regional and retailer-specific declines, the market's overall sales grew by 6.3%, indicating successful pricing, increased demand, and effective marketing.

Executive summary

Index

At a glance

Sales breakdown

Data insights

Trends

Backup

At a glance: The beverage market in Eurasia is thriving, with Drinks leading sales, especially in Alcohol and non-promotional offerings, and growth driven by volume and product mix rather than pricing. Convenience was the top-performing channel, and while most chains saw growth, Lidl and Aldi faced declines; Walmart and Carrefour were standouts, particularly in the Drinks department. Despite overall success, the market saw challenges in Food, Beer, and certain regions like France. Pages 8 to 15.

Sales breakdown: Italy leads in total beverage sales, followed by the USA, Switzerland, and France, with sales growth rates varying from -3.0% to 9.0% across countries. The Drinks department outperforms Food in total sales, and non-promotional items generate higher revenue in both categories. Alcohol and Wine command the highest unit prices and sales revenue, while Confectionary has high sales volume across channels, particularly in the Maxi channel. Pages 17 to 26.

Data insights: The beverage market is diverse, with Chocolate and Treats leading in volume while Liquor commands premium prices and strong growth. Class A companies dominate, contributing 80% of sales despite being only 40% of the total, and the market is well-distributed across regions, with Italy, the USA, Switzerland, and France as top performers. Alcohol leads in sales but ranks third in units sold, likely due to higher prices, while the market shows varying relationships between unit price change and unit growth rate across brands and subcategories. Pages 28 to 39.

Trends: The market saw a 5.2% increase in average unit price and 6.4% growth in total sales from July to August 2018, driven by strong promoted sales growth and positive performance in the Nord, Sud, and Centro regions. Penny's sales grew an impressive 30.7%, while the Convenience and Super channels showed the most significant growth among retail formats. Despite some regional and retailer-specific declines, the market's overall sales grew by 6.3%, indicating successful pricing, increased demand, and effective marketing. Pages 41 to 47.

Executive summary

Index

At a glance

Sales breakdown

Data insights

Trends

Backup

The beverage market in Eurasia is strong, with the Drinks department dominating sales, particularly in non-promotional offerings. Alcohol is the top category, and sales are well-distributed across countries and channels, indicating a diverse market presence (p.9). From July to August 2018, the market's sales increased, primarily due to changes in product volume and mix rather than pricing adjustments, suggesting successful marketing, shifting consumer preferences, or expanded product lines drove higher sales volumes (p.10).

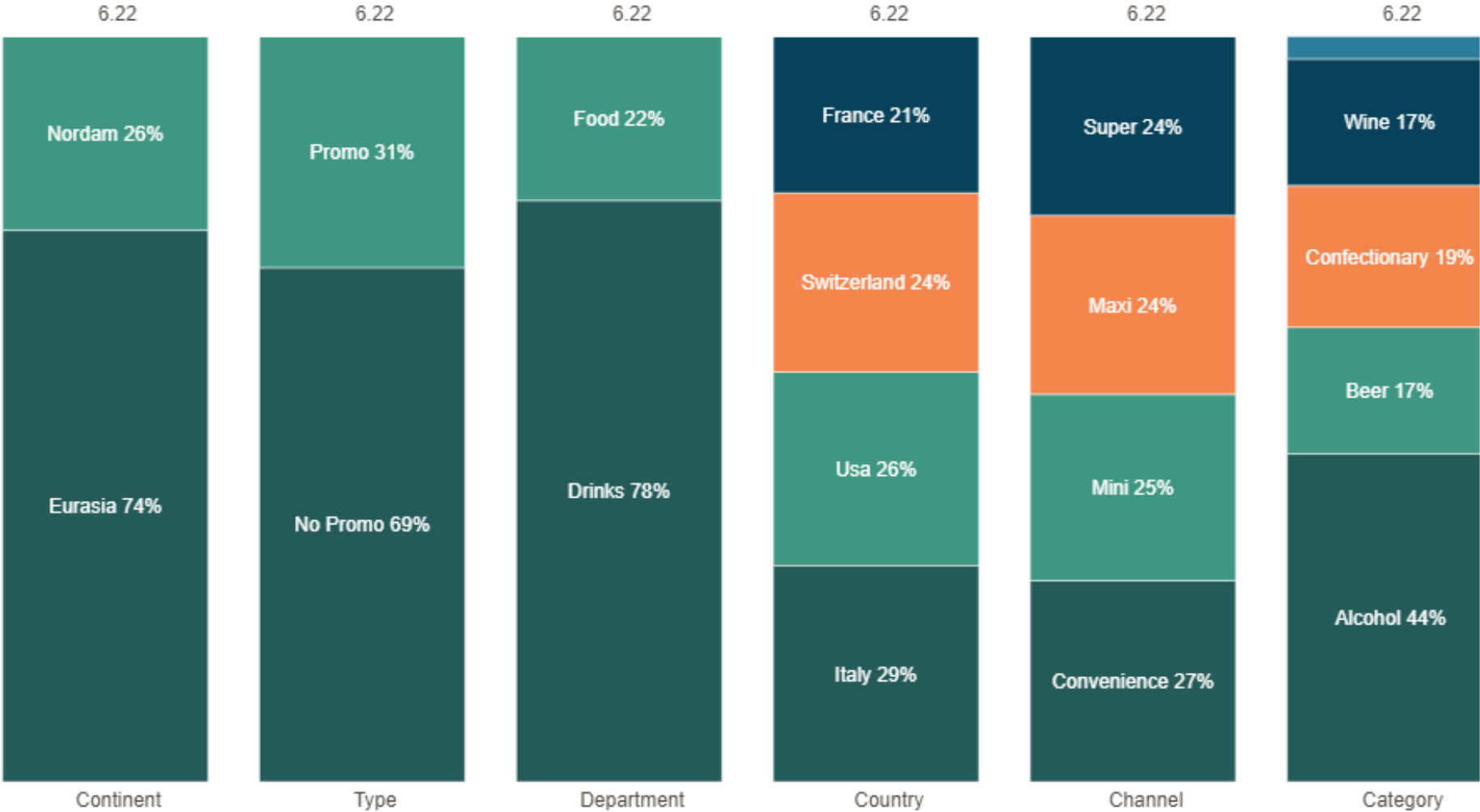
All sales channels grew during this period, with Convenience showing the highest increase in both absolute terms and percentage, driven by changes in units sold and product mix (p.11). The market's sales growth was largely attributed to strong performance in alcoholic beverages, especially those linked to Diageo and the Italian market, as well as effective promotions. However, a lack of promotions and underperformance in beer posed challenges (p.12).

The beverage market experienced significant variations from July to August 2018, with promotions, Alcohol, Diageo, and Don Julio - Tequila driving growth. The Drinks department and Convenience channel were strong, and certain regions and cities saw notable sales increases. However, Food and Beer faced challenges, as did sales in France (p.13).

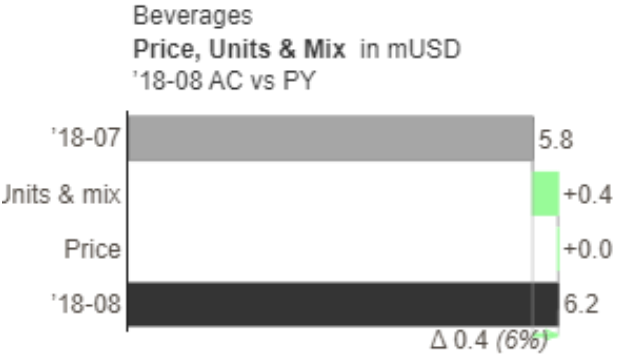
Walmart achieved the most significant growth, particularly in the 'Other rank >3' channel, consistently outperforming other chains across all sales channels along with Carrefour. Lidl and Aldi saw declines in various channels, while the 'Convenience' channel was the most competitive, with all chains except Lidl showing significant sales increases (p.14). From July to August 2018, the 'Other rank >4' chain and Carrefour saw growth in both Drinks and Food, while Walmart's Drinks department surged 22%. Lidl and Aldi experienced declines in both areas, with Drinks performance varying more across chains than Food, indicating different market dynamics (p.15).

The beverage market is strong in Eurasia. The Drinks department dominates sales, and non-promotional offerings lead. Alcohol is the top category, with nearly double the sales of Confectionary. Countries and channels have a balanced distribution, showing a diverse market presence and good distribution. Most revenue comes from regular-priced items, suggesting strong brands and quality drive purchases.

Beverages
 Sales in mUSD by dimension
 '18-08

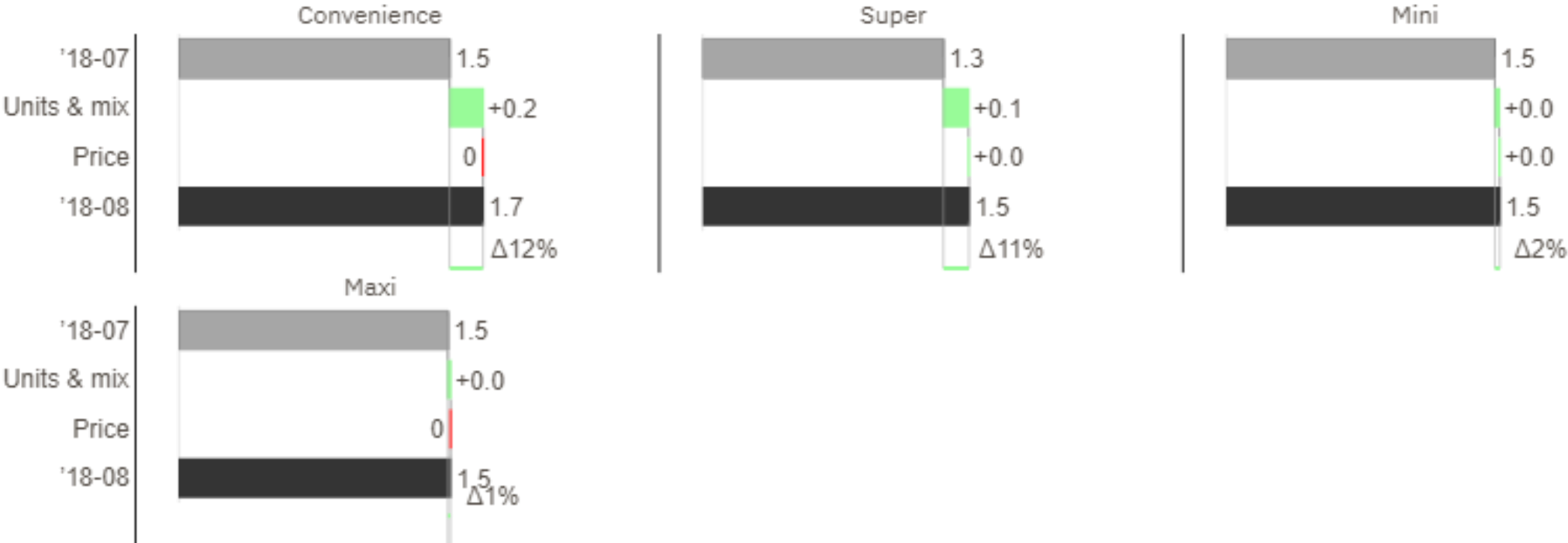


The market's sales increased from July to August 2018, mainly due to changes in product volume and mix, not pricing adjustments. This suggests successful marketing, shifting consumer preferences, or expanded product lines drove higher sales volumes. Prices had minimal impact, indicating a stable pricing strategy or a price-insensitive market.

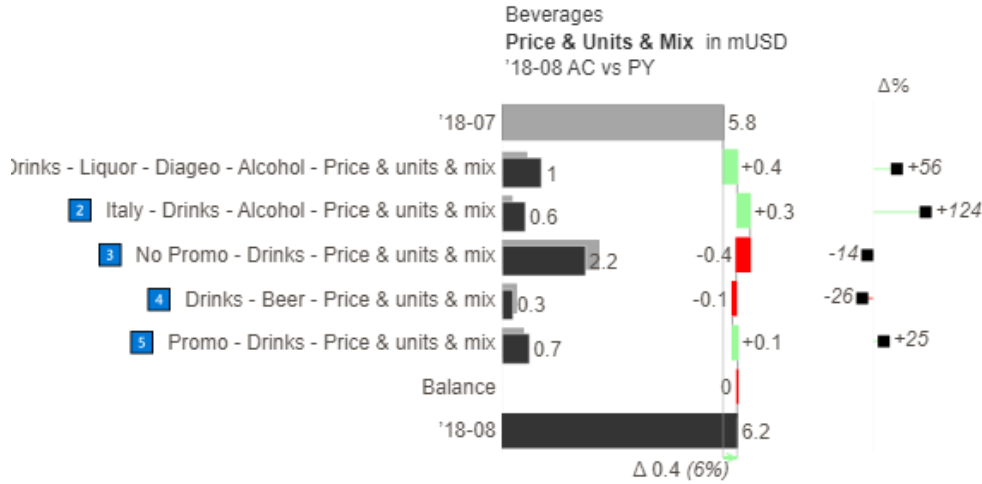


From July to August 2018, all sales channels grew, with Convenience showing the highest increase in both absolute terms and percentage. Changes in units sold and product mix primarily drove the growth, while price adjustments had a minimal effect. This suggests a healthy beverage market and the effectiveness of a diversified channel strategy, with Convenience offering the most significant returns.

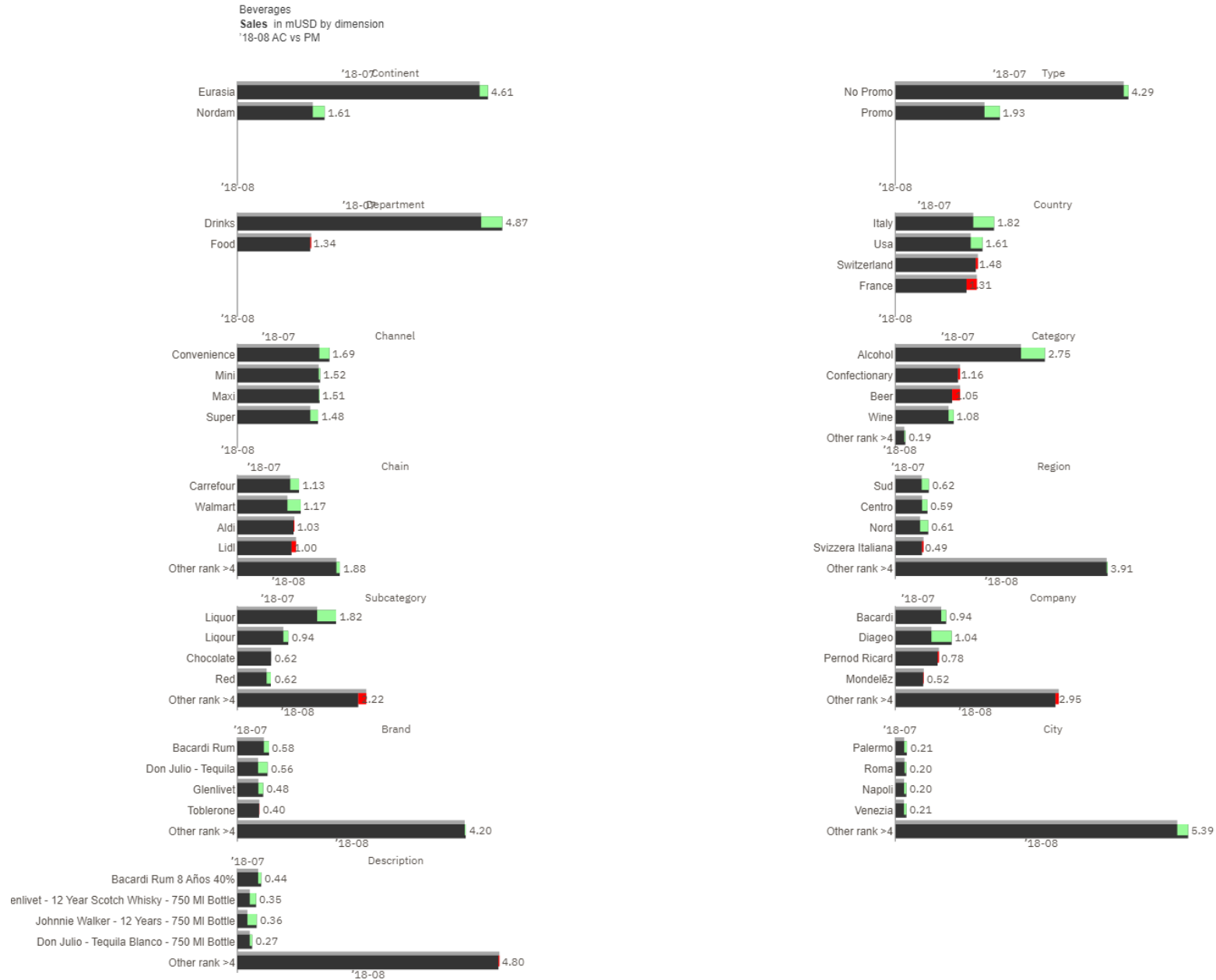
Beverages
 Price, Units & Mix in mUSD by Channel
 '18-08 AC vs PY



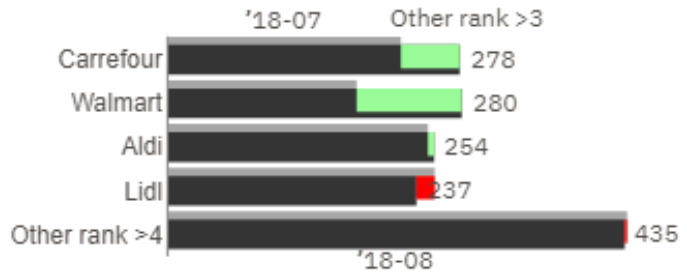
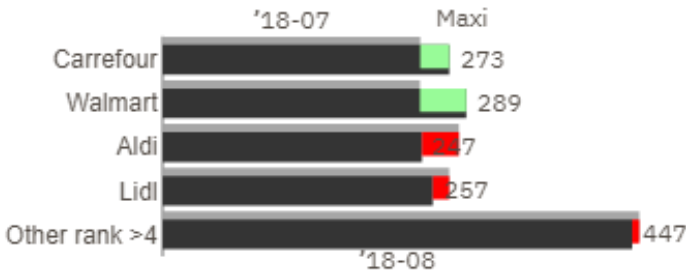
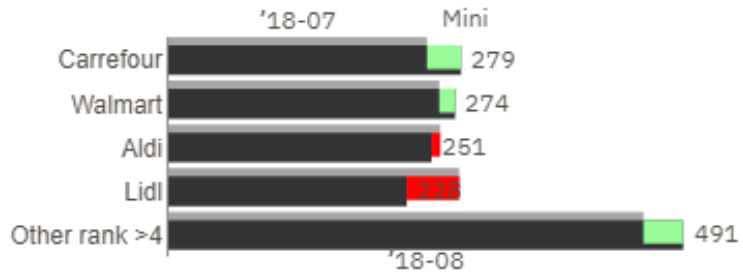
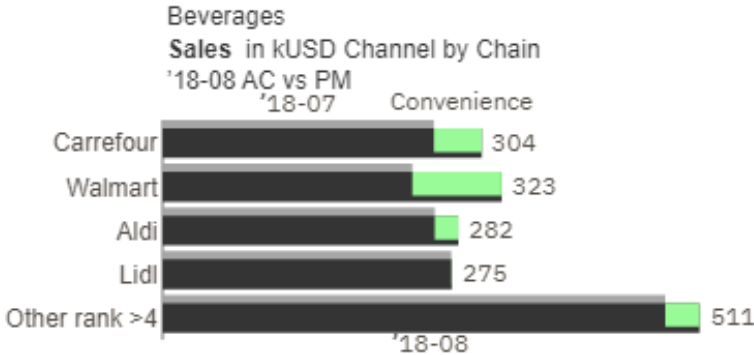
The market's sales increased from July to August 2018, driven by strong performance in alcoholic beverages, especially those linked to Diageo and the Italian market, and effective promotions. However, lack of promotions and underperformance in beer posed challenges. This highlights the need for continuous promotions and a strategic review of the beer category to sustain and boost sales.



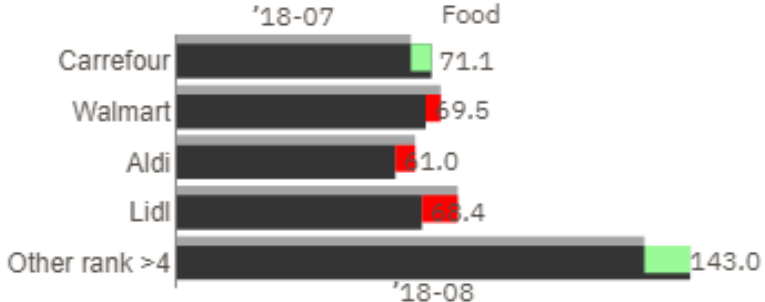
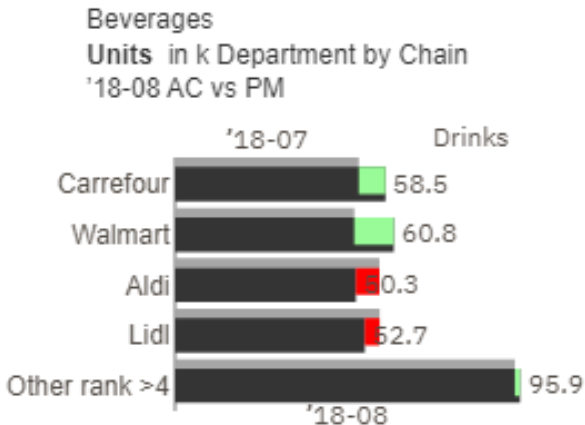
The beverage market varied significantly from July to August 2018. Promotions, Alcohol, Diageo and Don Julio - Tequila drove growth. The Drinks department and Convenience channel were strong, and certain regions and cities saw notable sales increases. However, Food and Beer faced challenges, as did sales in France. Strategic promotions, product mix, and targeted market focus are crucial to capitalize on opportunities in this dynamic industry.



Walmart achieved the most significant growth, particularly in the 'Other rank >3' channel, consistently outperforming other chains across all sales channels along with Carrefour. Lidl saw significant declines in the 'Mini' and 'Other rank >3' channels, while Aldi had a notable decrease in the 'Maxi' channel. The 'Convenience' channel was the most competitive, with all chains except Lidl showing significant sales increases. Larger chains seem to be expanding their market share across various channels, possibly at the expense of smaller or less competitive chains in certain channels.



From July to August 2018, the 'Other rank >4' chain and Carrefour saw growth in both Drinks and Food. Walmart's Drinks department surged 22%. However, Lidl and Aldi saw declines in both areas. Drinks performance varied more across chains than Food did, pointing to different market dynamics. The results show a competitive, dynamic market where chains must adapt to grow.



Executive summary

Index

At a glance

Sales breakdown

Data insights

Trends

Backup

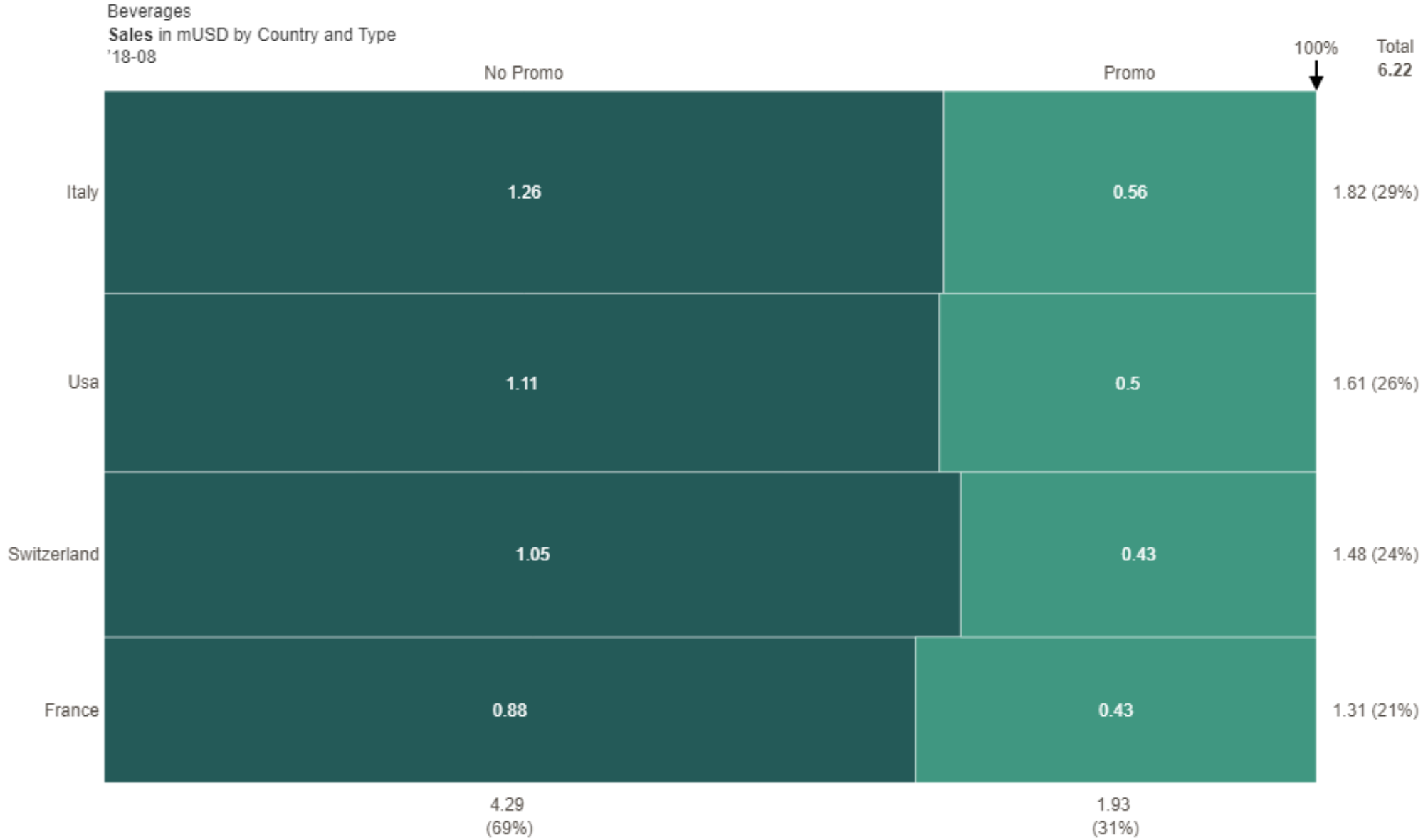
The beverage industry shows varied performance across countries, with Italy leading in total sales, followed by the USA, Switzerland, and France. Sales without promotions significantly outweigh promotional sales, indicating strong base demand (p.18). The Drinks department outperforms Food in total sales, with Italy and the USA as key markets. Promotions contribute to nearly a third of Drinks sales and slightly less in Food (p.19).

The average sales growth rate across countries is 1.0%, but Italy and Switzerland show declines of -3.0%, while France has a modest 2.0% increase and the USA demonstrates significant growth at 9.0% (p.20). These varied rates highlight the dynamic nature of the beverage market (p.21). Italy's Drinks department grew by 14%, while France's declined by 7%. The USA had a healthy 7% growth in drinks, and Switzerland saw a slight 2% decline (p.22).

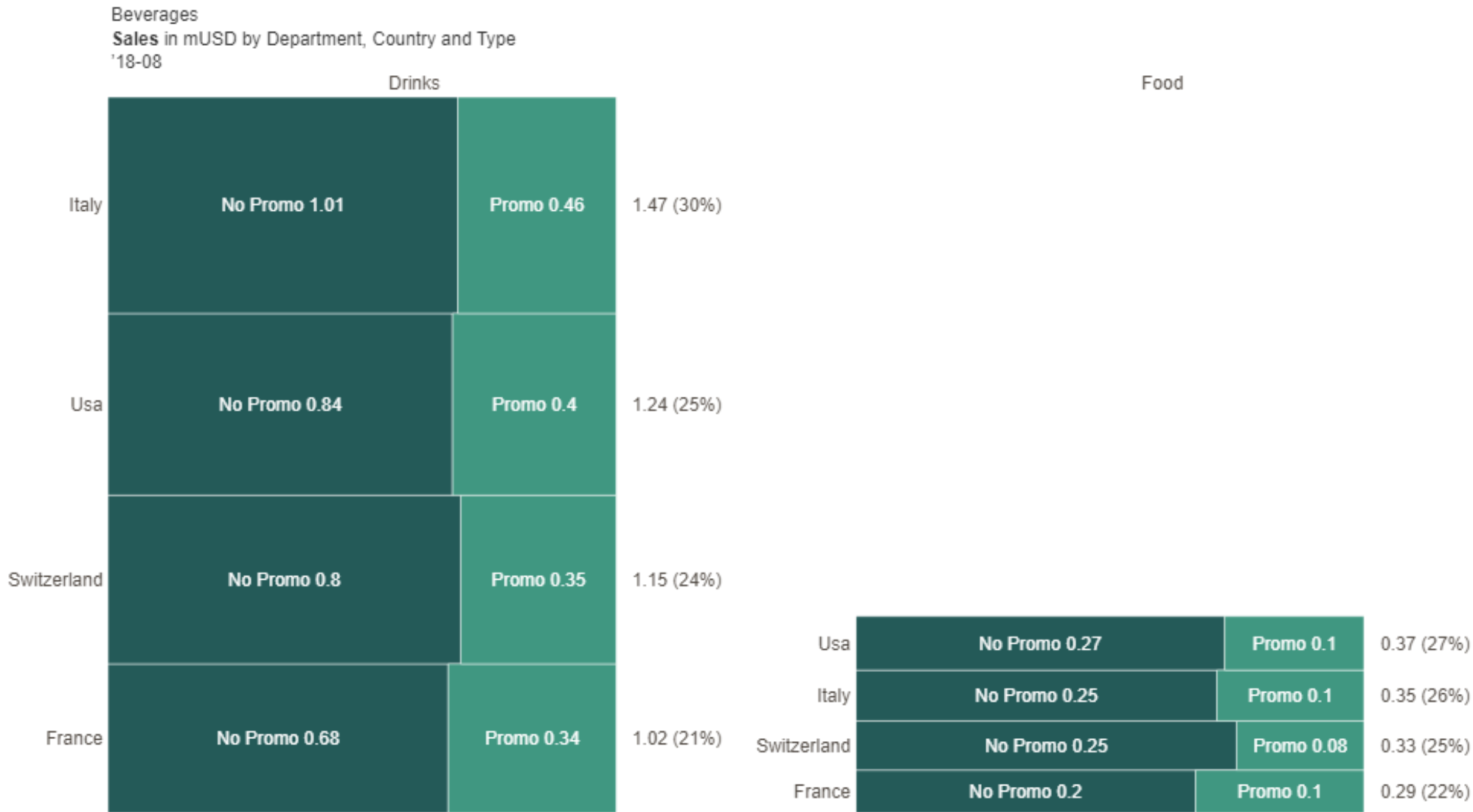
Both Drinks and Food departments have higher sales for non-promotional items, with Food outselling Drinks in both promotional categories (p.23). This trend is consistent across Eurasia and Nordam, with Eurasia having substantially higher sales than Nordam for both Drinks and Food (p.24).

Alcohol generates the highest sales revenue despite not having the highest units sold, suggesting high product value and profit margin. Confectionary has high sales volume, translating to substantial revenue (p.25). Alcohol and Wine command higher unit prices across channels, while Confectionary and Pasta And Rice are positioned at lower price points. Convenience channel customers prefer purchasing Alcohol, Wine, and Beer, while Confectionary performs best in the Maxi channel (p.26).

Italy leads in total beverage sales with 1.82 million USD, followed by the USA, Switzerland, and France. Across all countries, sales without promotion significantly outweigh those with promotions, indicating a strong base demand that doesn't rely on promotional activities. However, the consistent presence of promotional sales suggests they are an effective strategy for boosting sales, albeit to varying degrees.



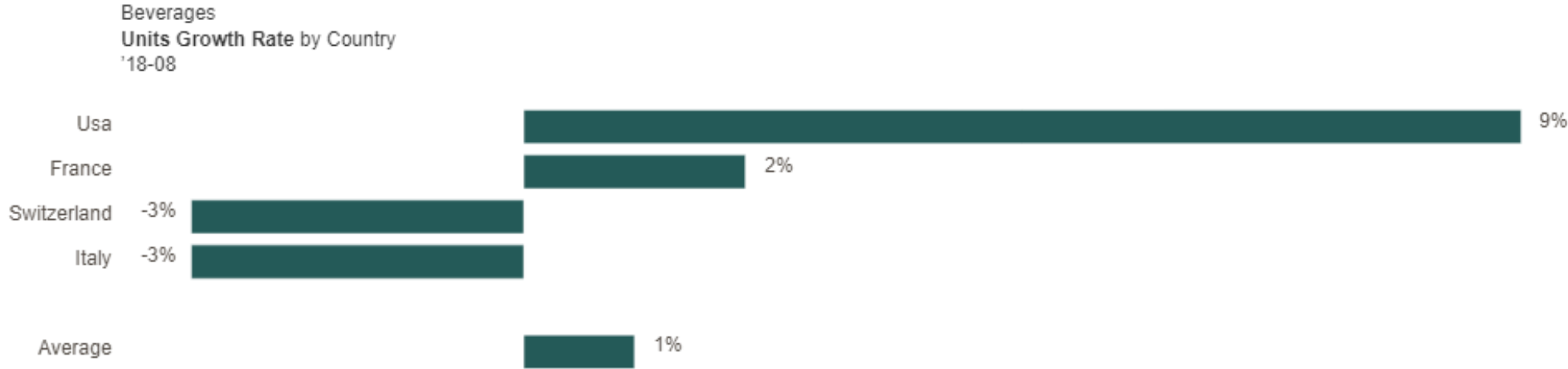
The Drinks department significantly outperforms Food in total sales, possibly due to higher consumer demand or more effective sales and marketing. Italy and the USA are key markets, leading sales in both departments. Promotions drive sales, contributing to nearly a third of Drinks sales and slightly less in Food.



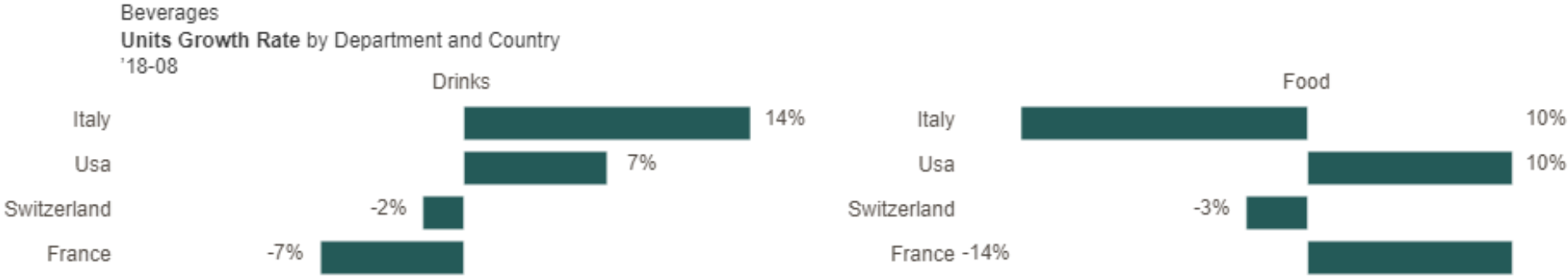
The average sales growth rate across all departments was 6%. However, Food showed a decline of -1.0%, contrasting with a 9% growth of Drinks.



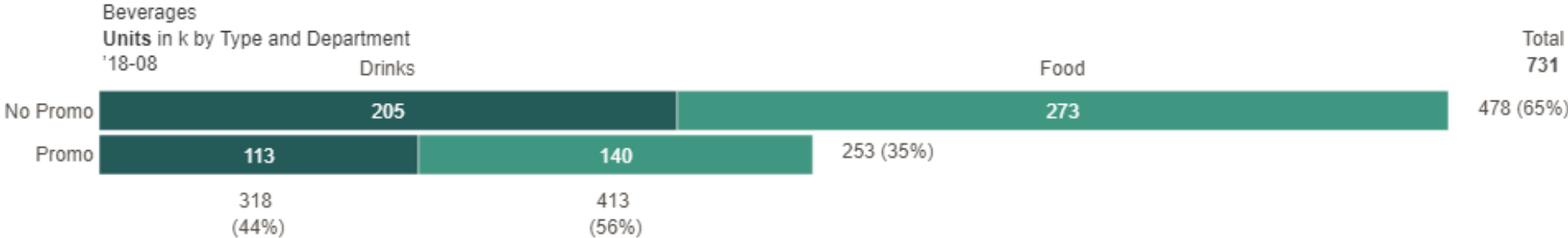
The USA leads the beverage industry with 9.0% growth, while France shows modest 2.0% gains. However, Italy and Switzerland face declines of -3.0% each. These varied growth rates highlight the dynamic nature of the beverage market, influenced by consumer preferences, economic conditions, and regulatory changes. Businesses must stay attuned to navigate effectively.



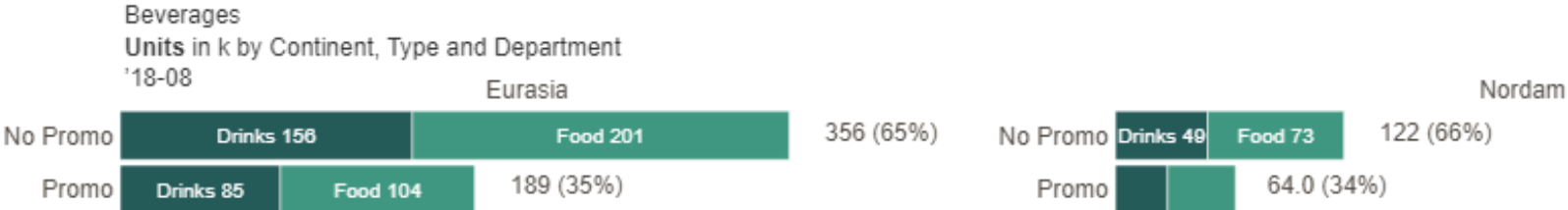
Italy's Drinks department grew substantially by 14%. In contrast, France's Drinks department declined notably by 7%. The USA had a healthy 7% growth in the drinks market, while Switzerland saw a slight 2% decline, indicating a relatively stable but slightly contracting market.



Both Drinks and Food departments have significantly higher sales for No Promo items compared to Promo items. This shows most beverage sales in these departments don't rely on promotions to drive volume. In both Promo and No Promo categories, the Food Department outsells the Drinks Department. This suggests beverages sold in the Food Department have higher demand than the Drinks Department, with or without promotions.

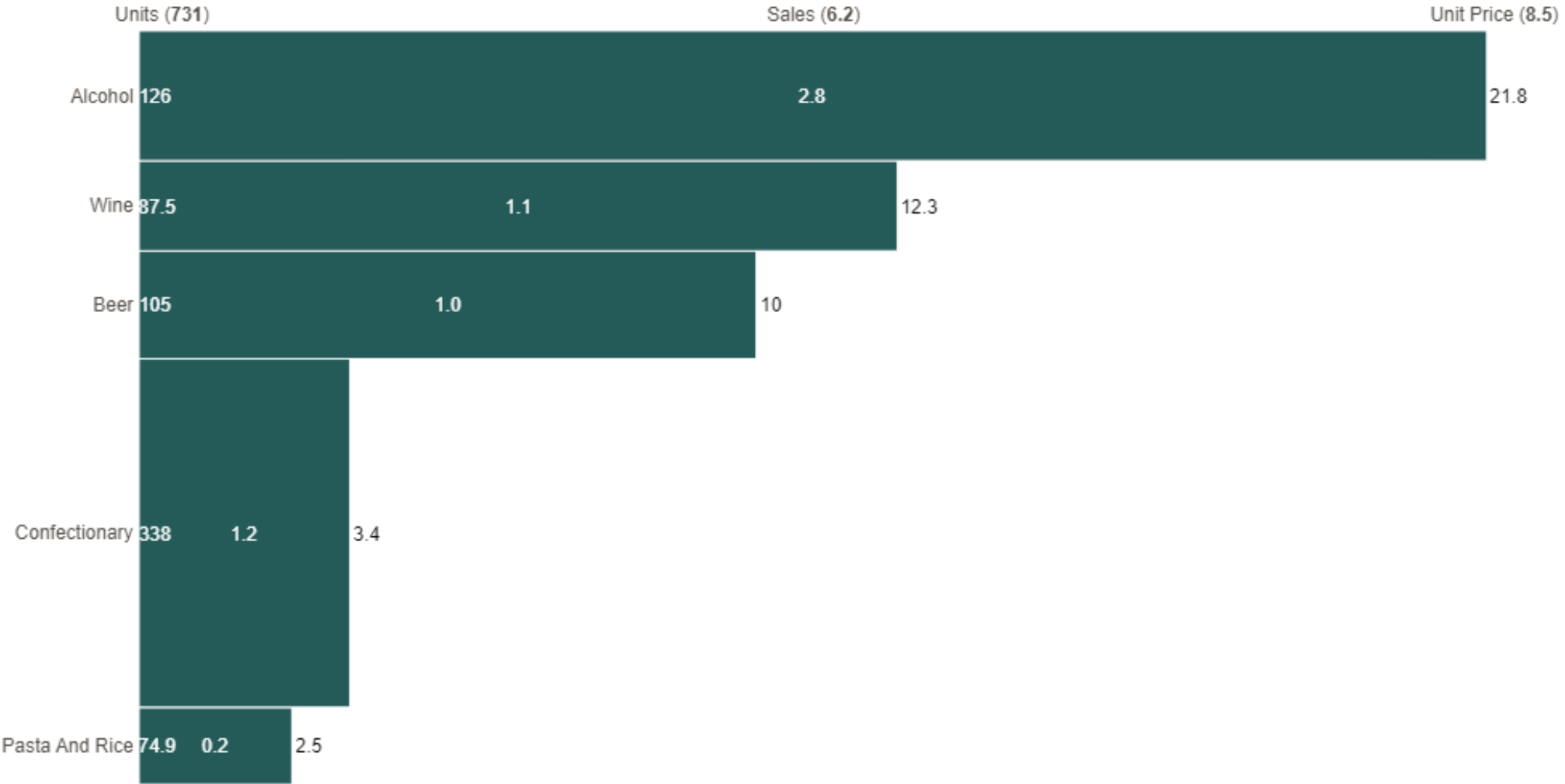


Across Eurasia and Nordam, items sold without promotions significantly outperform those sold with promotions in terms of units sold. This trend is consistent for both Drinks and Food departments. Food items outsell Drinks in both promotional categories and across both continents, indicating higher demand or preference for Food over Drinks. Eurasia has substantially higher sales than Nordam for both Drinks and Food, regardless of promotion status, suggesting a larger market size or higher consumer demand in Eurasia.

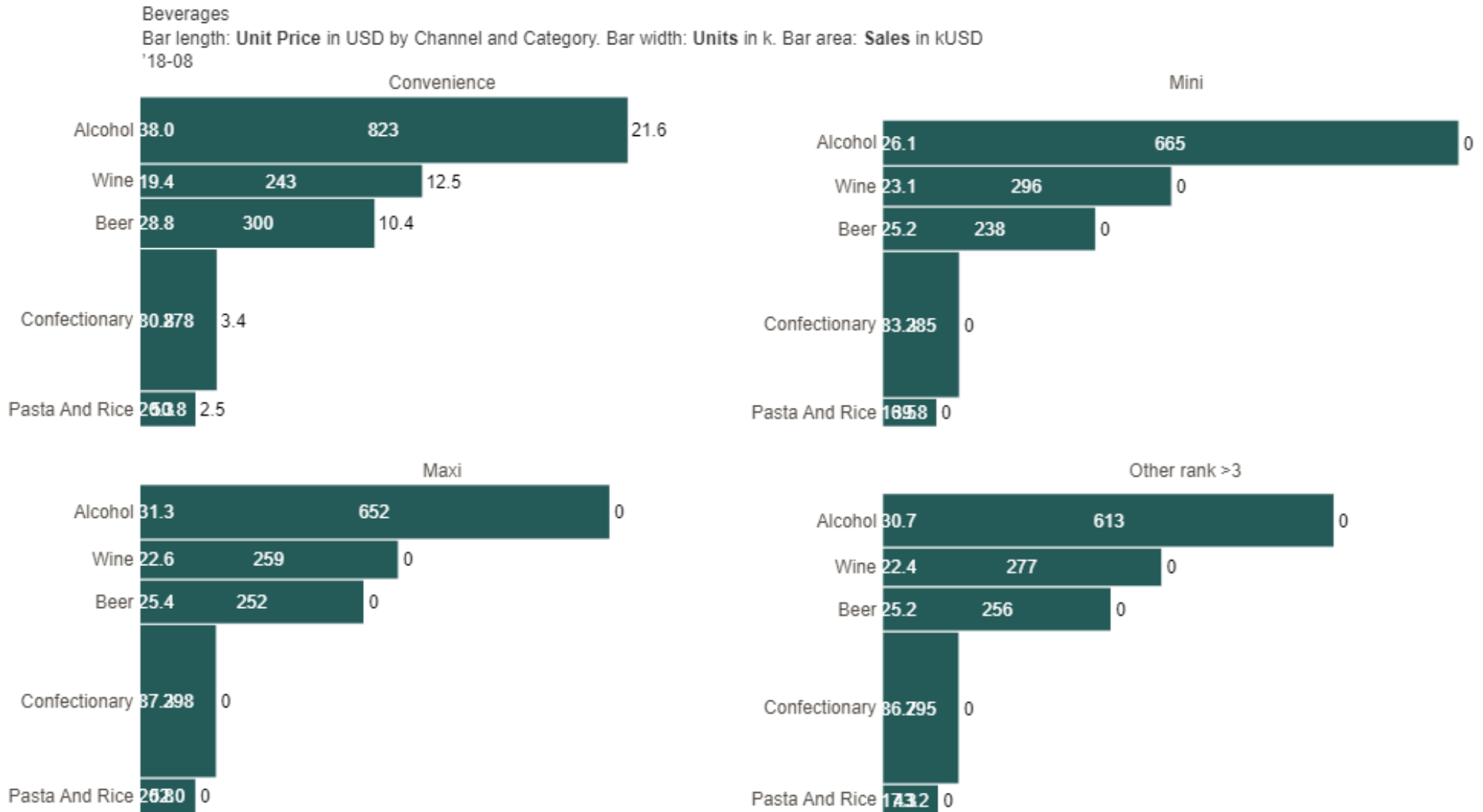


Alcohol generates the highest sales revenue among all beverage categories, significantly outpacing the others despite not having the highest units sold. This suggests a high product value and profit margin. Confectionary has a high sales volume, which translates to substantial sales revenue, second only to Alcohol. Lower-priced items can still generate significant revenue through high volume sales. There is a clear correlation between unit price and sales revenue across categories - those with higher unit prices like Alcohol and Wine tend to generate more revenue, indicating that customers are willing to pay more for these products.

Beverages
 Bar length: Unit Price in USD by Category. Bar width: Units in k. Bar area: Sales in mUSD
 '18-08



Alcohol and Wine command higher unit prices across channels, likely due to perceived value or brand positioning. Confectionary and Pasta And Rice are positioned at lower price points, possibly due to market competition or lower production costs. Convenience channel customers prefer purchasing Alcohol, Wine, and Beer, indicating a trend towards impulse or convenience buying for these categories. Confectionary performs best in the Maxi channel, suggesting these items are more frequently bought in bulk or as part of larger shopping trips.



Executive summary

Index

At a glance

Sales breakdown

Data insights

Trends

Backup

The beverage market is diverse, with Chocolate and Treats leading in volume at low prices, while Liquor and Liquor command premium prices with strong growth (p.29). Drinks have higher prices and more sales growth variability than Food, with Liquor leading in units sold and growth (p.30). Premium brands like Bacardi Rum, Don Julio Tequila, and Johnnie Walker show strong sales, while Toblerone has high volume but lower revenue (p.31). The market has a wide price range, allowing for targeting different consumer segments (p.29).

Class A companies dominate the beverage market, contributing 80% of sales despite being only 40% of the total, suggesting higher prices or margins (p.32). The market has a well-distributed sales and units strategy across various regions, with smaller regions grouped under "Other Rank >7" making a notable contribution (p.33). Italy leads in sales, followed by the USA, Switzerland, and France, with France performing strongly in units sold (p.34).

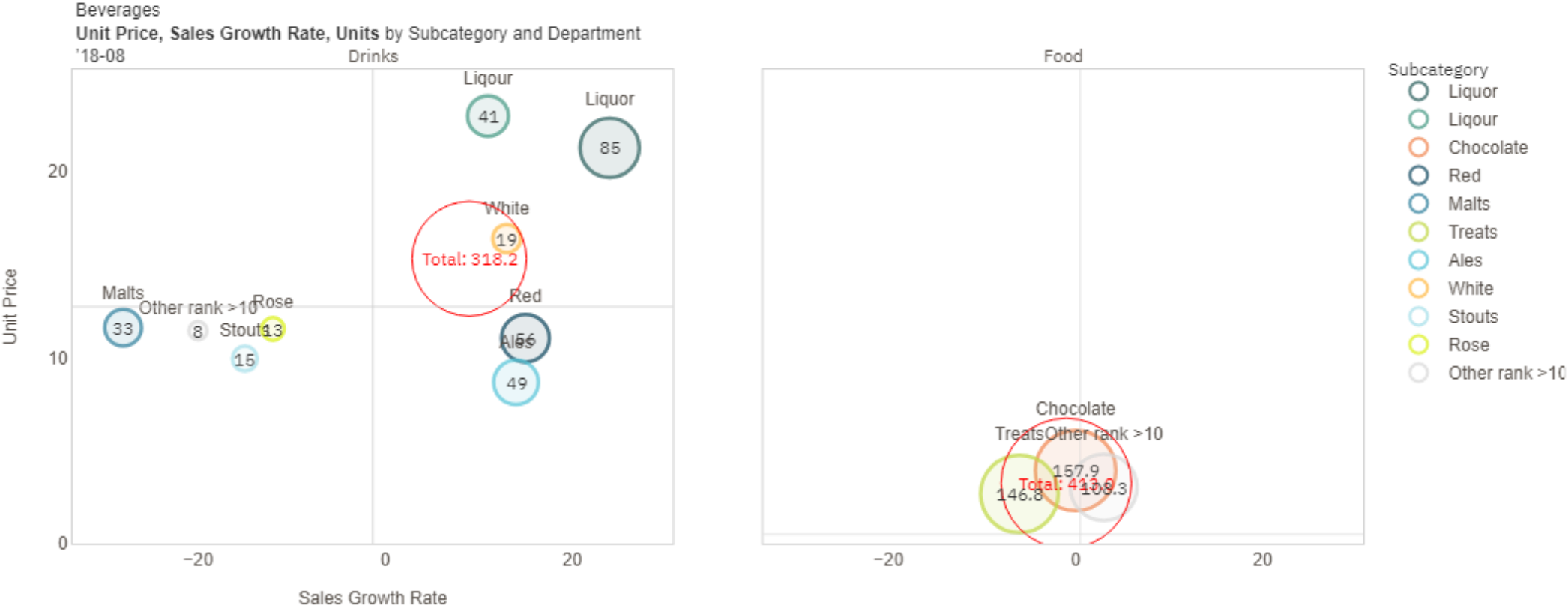
Alcohol leads in sales but ranks third in units sold, likely due to higher prices or margins, while Confectionary has the most units sold but lower sales (p.35). The market shows varying relationships between unit price change and unit growth rate across brands, with Reserve Gallo standing out for high unit growth despite a slight price decrease (p.36). Liquor shows a much higher Sales Growth Rate than other Beverages subcategories, while Beer and Wine have moderate to low sales growth (p.37).

The beverage market has a 'weak' Sales concentration, with fewer than 15 Brands contributing to 79% of total Sales, and a slightly higher Units concentration (p.38). France and Switzerland have significant brand overlap, suggesting similar preferences or market dynamics, while Italy has comparatively small overlaps with Switzerland and the USA (p.39).

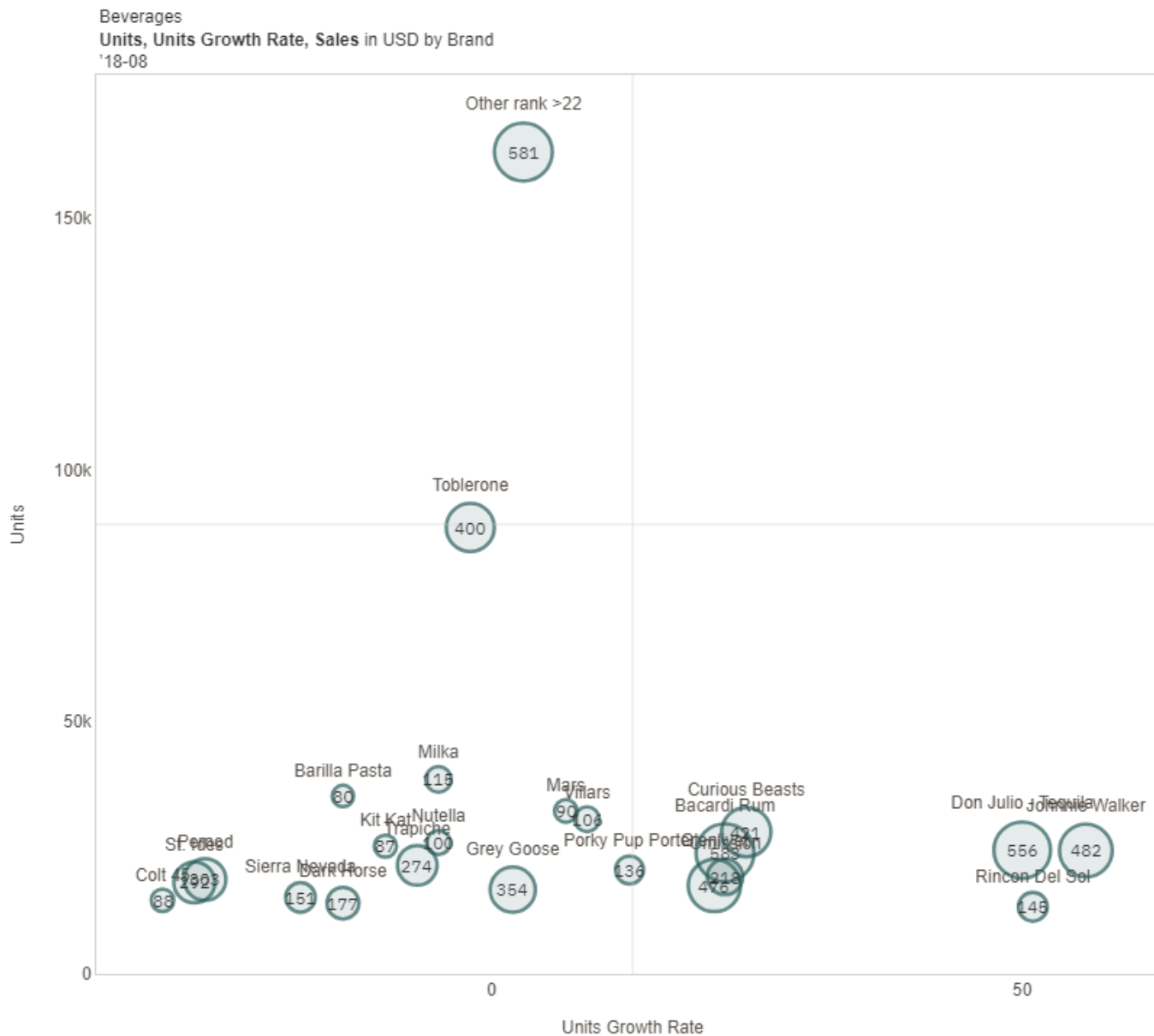
The beverage market is a mixed bag. Chocolate and Treats are the volume leaders, going for high volume at low prices. Liquor and Liquor, on the other hand, command premium prices and are growing strongly. Several subcategories are struggling with negative growth, hinting at changing consumer tastes. There's room to grow in subcategories on the upswing, and the wide price range means different consumer segments can be targeted.



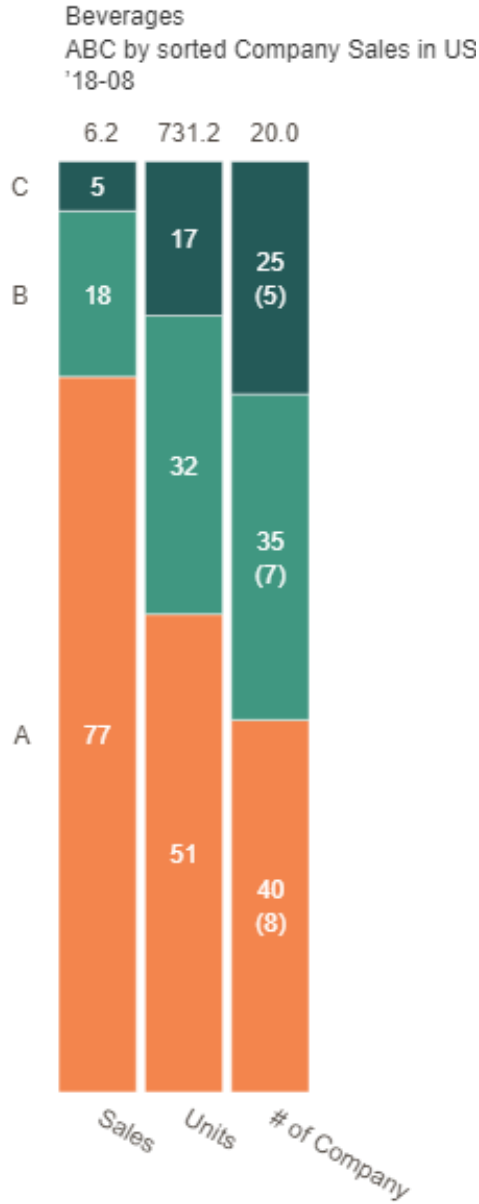
Drinks have higher prices and more sales growth variability than Food. Liquor tops alcohol in units sold and growth, but several subcategories face declining interest. In Food, Chocolate has steady demand with high volume and stable growth. The combined Other rank >10 category suggests niche products are growing, offsetting declines elsewhere.



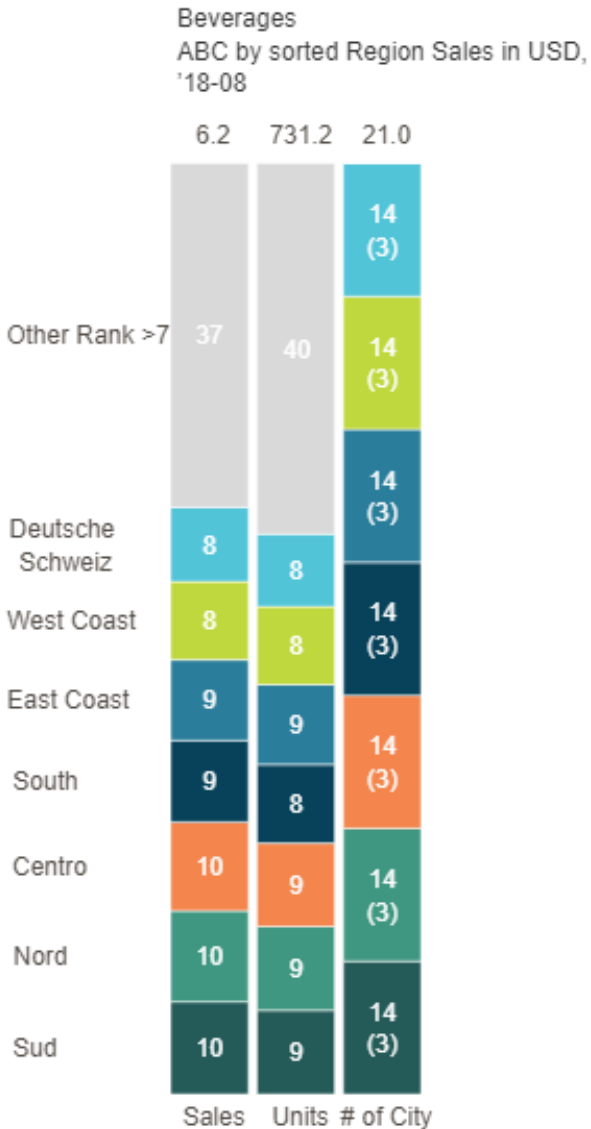
Bacardi Rum, Don Julio Tequila, and Johnnie Walker show strong sales, suggesting a trend towards premium beverages. Toblerone has high volume but lower revenue, needing more volume to match premium brands. Growth rates vary significantly, with some brands rapidly expanding while others decline, requiring a review of market strategies.



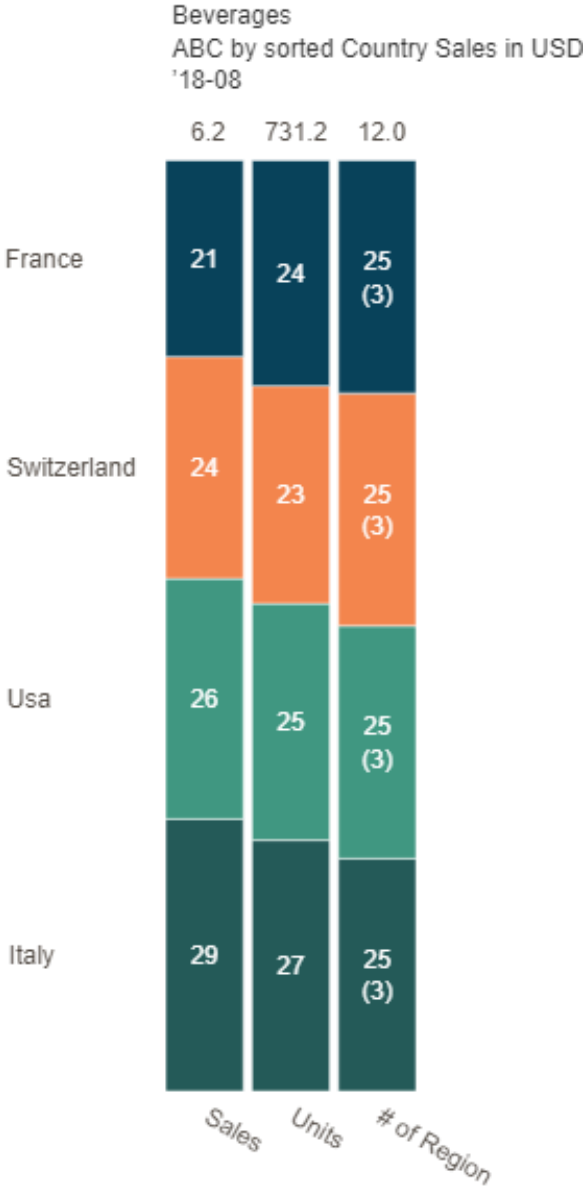
Class A companies dominate the beverage market, contributing 80% of sales despite being only 40% of the total. This concentration is considered 'weak' as it's spread across 40 companies. Class A accounts for a higher percentage of sales than units, suggesting higher prices or margins. The market has a diverse price range and a balanced industry structure in terms of company count.



The beverage market has a well-distributed sales and units strategy across various regions. Smaller regions, grouped under "Other Rank >7," make a notable contribution. Key regions have a balanced contribution to sales and units, with minor variations. The regions have a uniform number of cities, suggesting a deliberate distribution strategy to maintain a diverse geographical presence.



Italy leads the beverage market in sales, with the USA, Switzerland, and France following closely behind. France performs strongly in units sold, hinting at effective strategies or unique consumer preferences. The even regional distribution suggests a strategic approach to market presence. The sales and units data highlight areas of strength and opportunity across these markets.

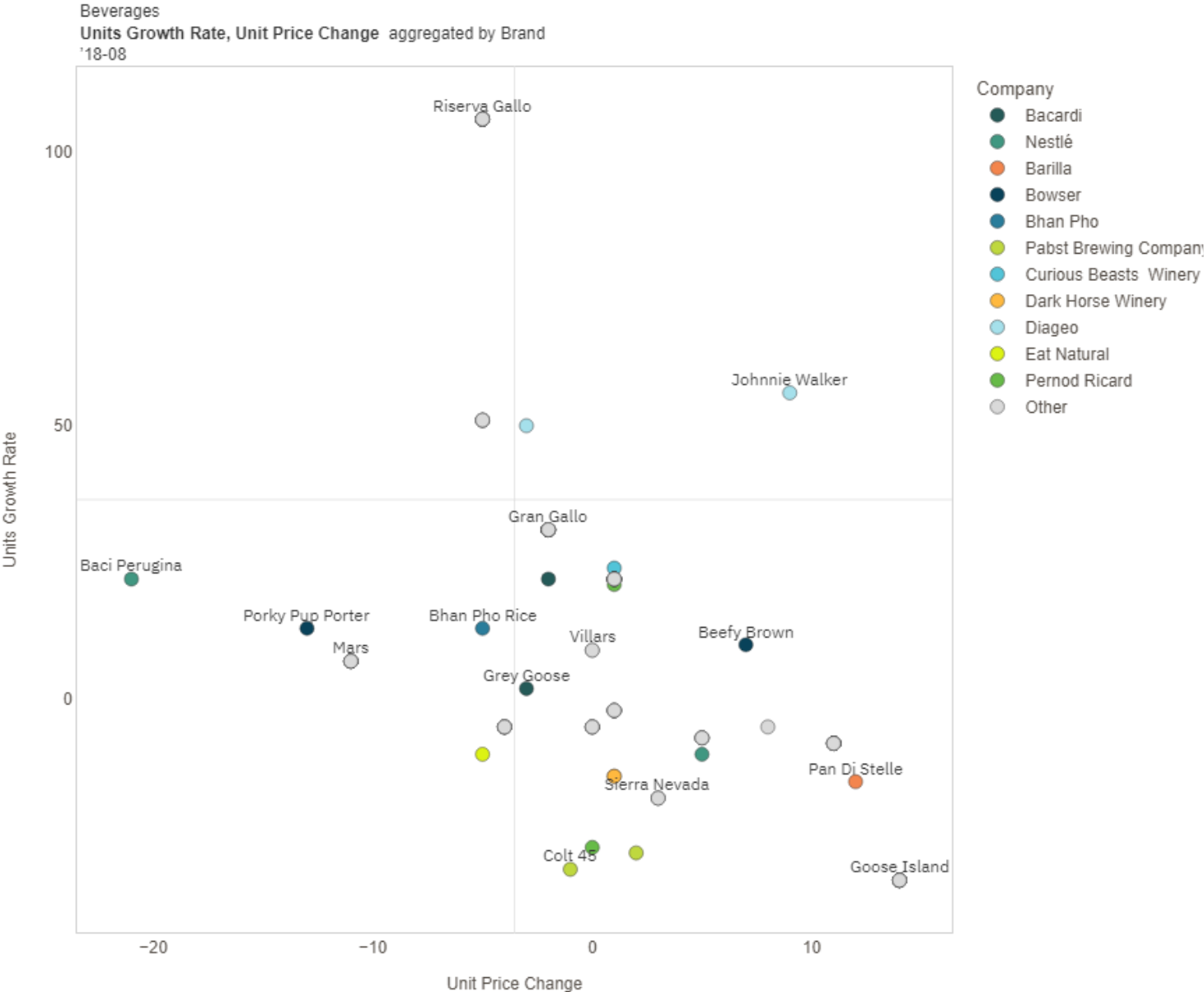


Alcohol leads in sales but ranks third in units sold, likely due to higher prices or margins. Confectionary has the most units sold but lower sales, needing higher volume for revenue. Beer performs well, with the most subcategories. Pasta and rice contribute least to sales despite reasonable units, suggesting the lowest prices. Each category's market position varies based on sales, units, and subcategories.

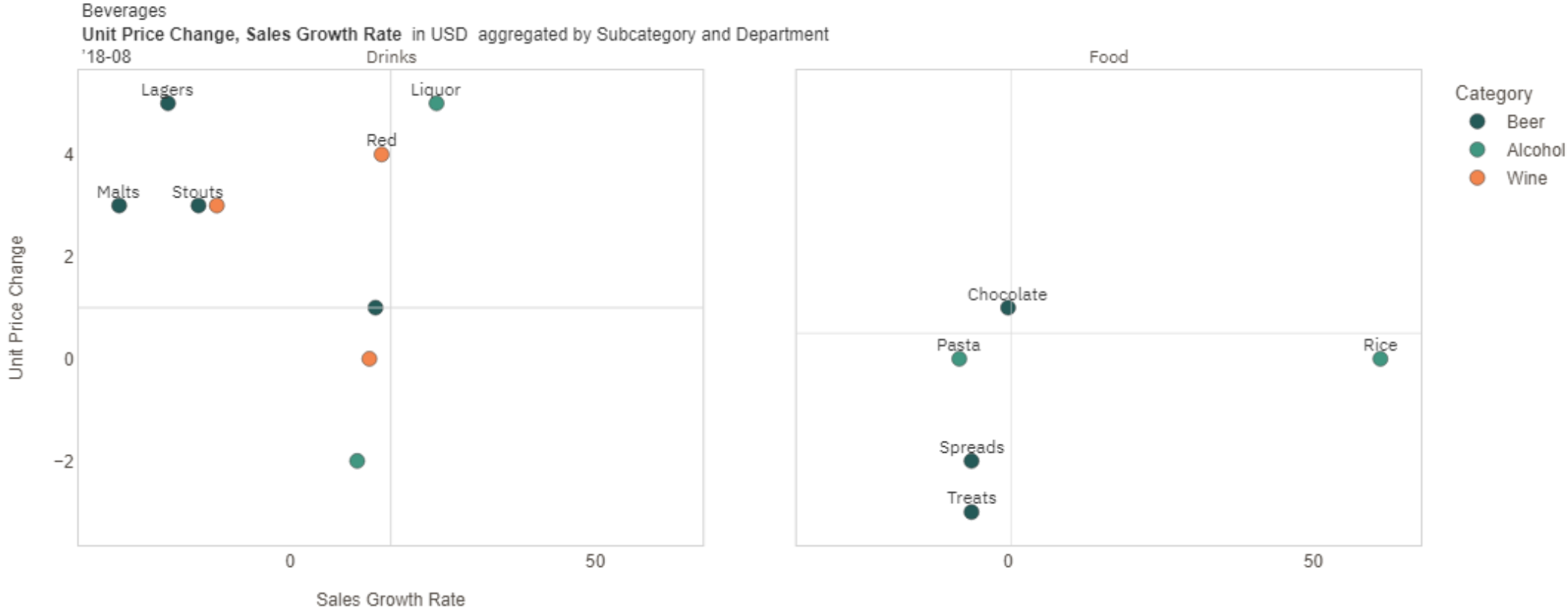
Beverages
 ABC by sorted Category Sales in USD, count by Subca
 '18-08



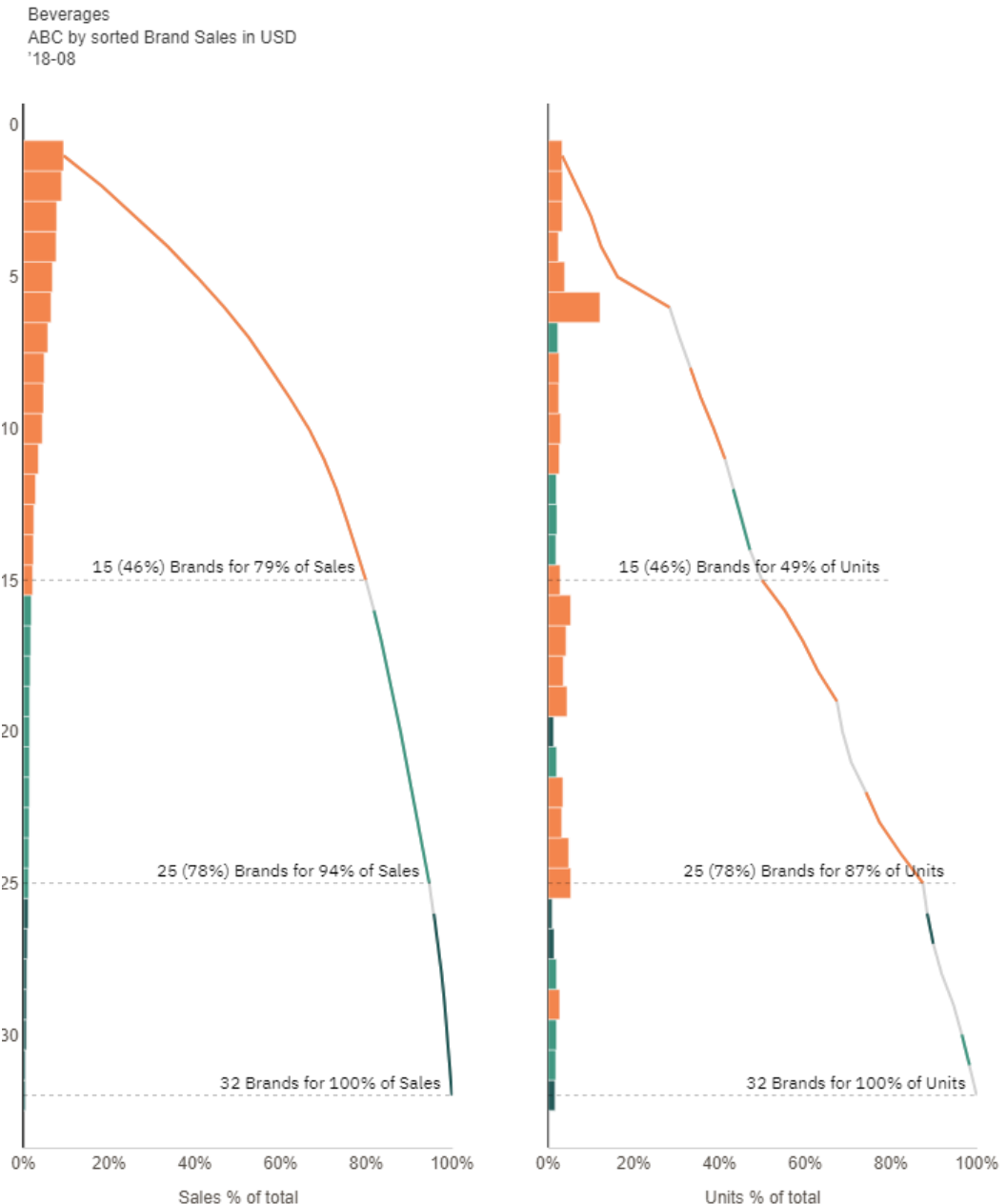
The beverage market shows varying relationships between unit price change and unit growth rate across brands. Reserve Gallo stands out with high unit growth despite a slight price decrease, suggesting strong demand or effective promotions. Stable brands like Grey Goose and Bacardi show little change in price and growth. Baci Perugina decreased prices and achieved slightly positive growth, potentially using pricing strategies to gain market share. No brands have both high growth and significant price increases, suggesting a competitive market landscape.



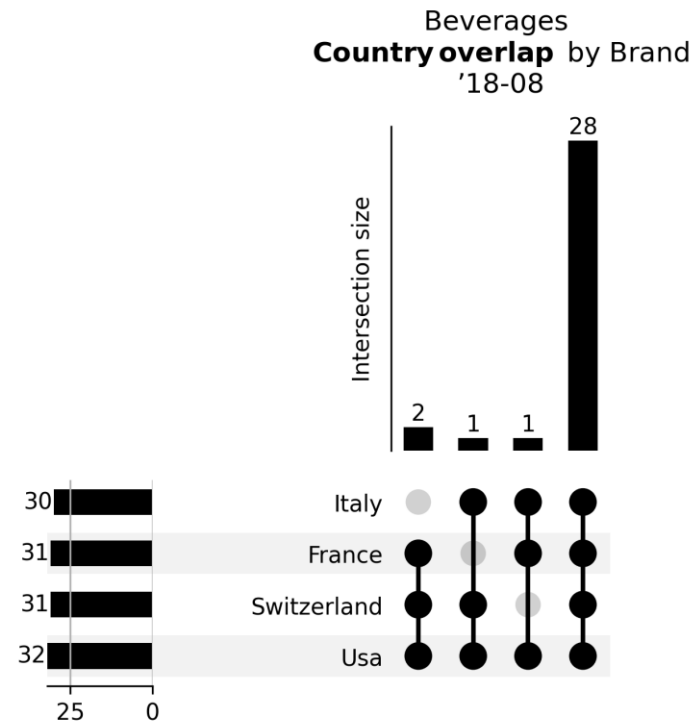
Liquor shows a much higher Sales Growth Rate than other Beverages subcategories, suggesting strong market performance. Beer and Wine have moderate to low sales growth, with fairly consistent Unit Price increases. In Food, Rice has high Sales Growth Rate, indicating rising demand without major price changes. Chocolate, Pasta, and Spreads show stagnant sales growth and unit prices, potentially pointing to stable but saturated market segments.



The beverage market has a 'weak' Sales concentration. Fewer than 15 Brands contribute to 79% of total Sales. The Units concentration is slightly higher, with the top 15 Brands constituting 49% of total Units. Some Brands have similar Sales but very different Units, as shown by the jagged pattern and mixed color segments in the Units line graph.



France and Switzerland have significant brand overlap in the beverage market, suggesting similar preferences or market dynamics. Italy has comparatively small overlaps with Switzerland and the USA. No brands are common to either France & USA or Switzerland & USA. This information is useful for understanding market similarities and differences and for strategic planning in the beverage industry.



Executive summary

Index

At a glance

Sales breakdown

Data insights

Trends

Backup

The market experienced a 5.2% increase in average unit price and a 6.4% growth in total sales from July to August 2018, suggesting inelastic demand for the product(s) (p.42). This led to a significant revenue increase, indicating positive business health and successful pricing, increased demand, or effective marketing (p.43).

Promotions played a crucial role in driving sales growth, with promoted sales growing at a CMGR of 17.3%, significantly higher than the 2.1% for non-promoted sales (p.44). Despite mixed performance across regions, overall sales grew by 6.3%, with the Nord, Sud, and Centro regions showing significant momentum, while Deutsche Schweiz remained flat, and Suisse Romande and Svizzera Italiana declined (p.45).

Among supermarket chains, Penny's sales grew an impressive 30.7%, surpassing Tesco and nearing Aldi and Lidl by August 2018. Carrefour and Walmart also showed strong growth, while Tesco and Lidl saw significant declines (p.46). The Convenience and Super channels demonstrated the most significant sales growth, with CMGRs of 12.4% and 10.6% respectively, suggesting stronger consumer preference or better market conditions for these retail formats. In contrast, the Maxi and Mini channels had relatively stagnant growth (p.47).

The average unit price increased by 5.2%, from \$8.1 to \$8.5, while total sales grew by 6.4%, from \$5.9 million to \$6.2 million from July to August 2018. This suggests the demand for the product(s) might be inelastic within this period, meaning the price increase did not deter customers from purchasing.

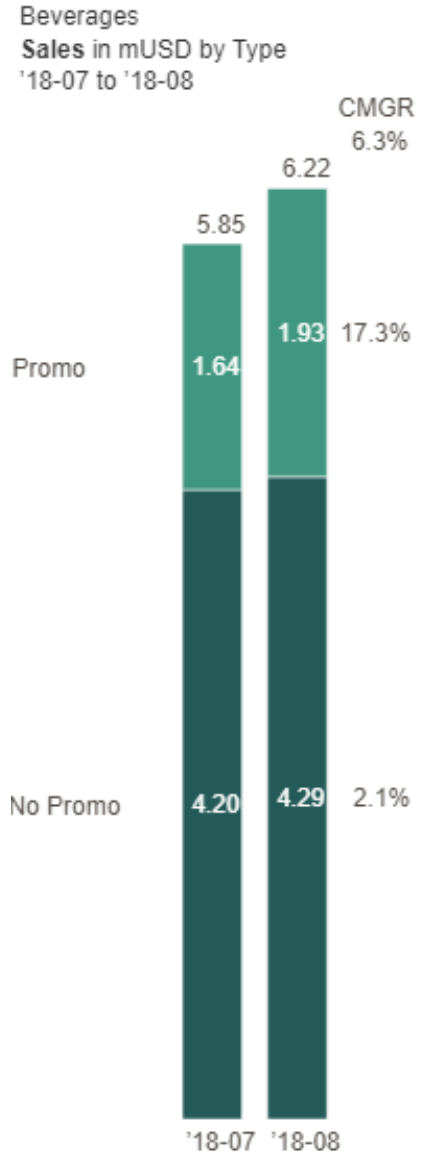
Beverages
Bars: Unit Price in USD. Line: Sales in mUS
'18-07 to '18-08



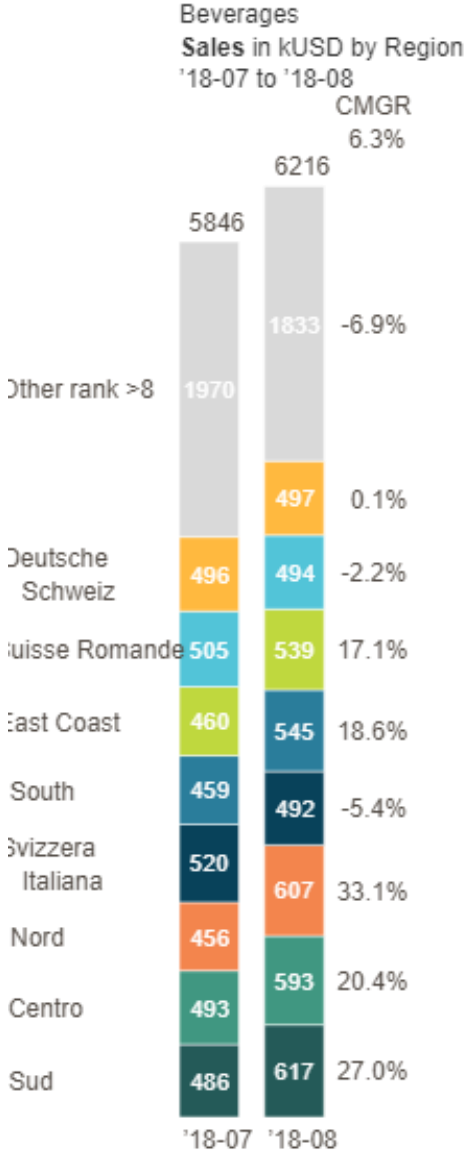
The unit price and total sales growth led to a significant revenue increase from July to August 2018. This positively indicates business health and could suggest successful pricing, increased demand, or effective marketing.



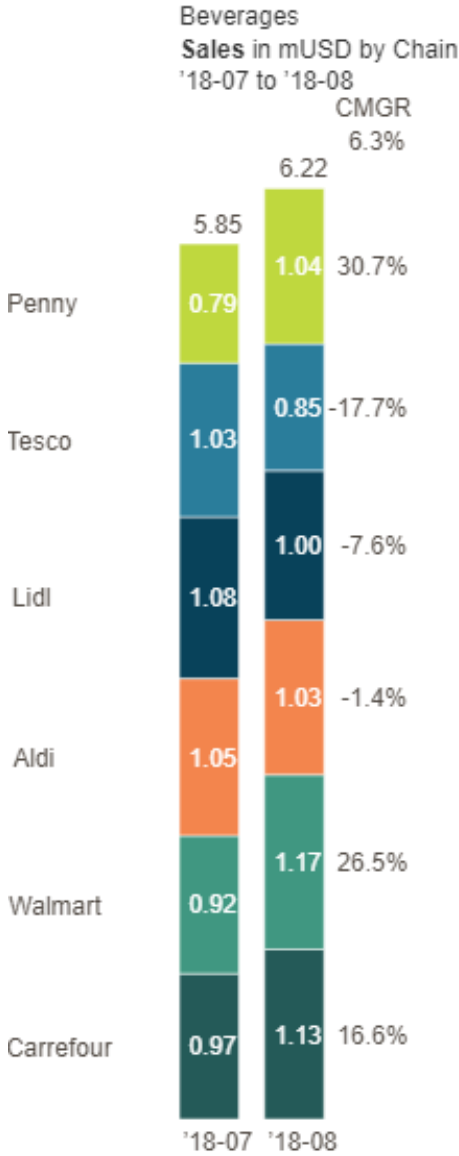
Promotions significantly impacted sales growth, with a CMGR of 17.3% for promoted sales, much higher than the 2.1% for non-promoted sales. Promoted sales increased by \$283.8k from July to August 2018, while non-promoted sales saw a modest \$86.7k increase, highlighting the effectiveness of promotions in driving short-term sales growth.



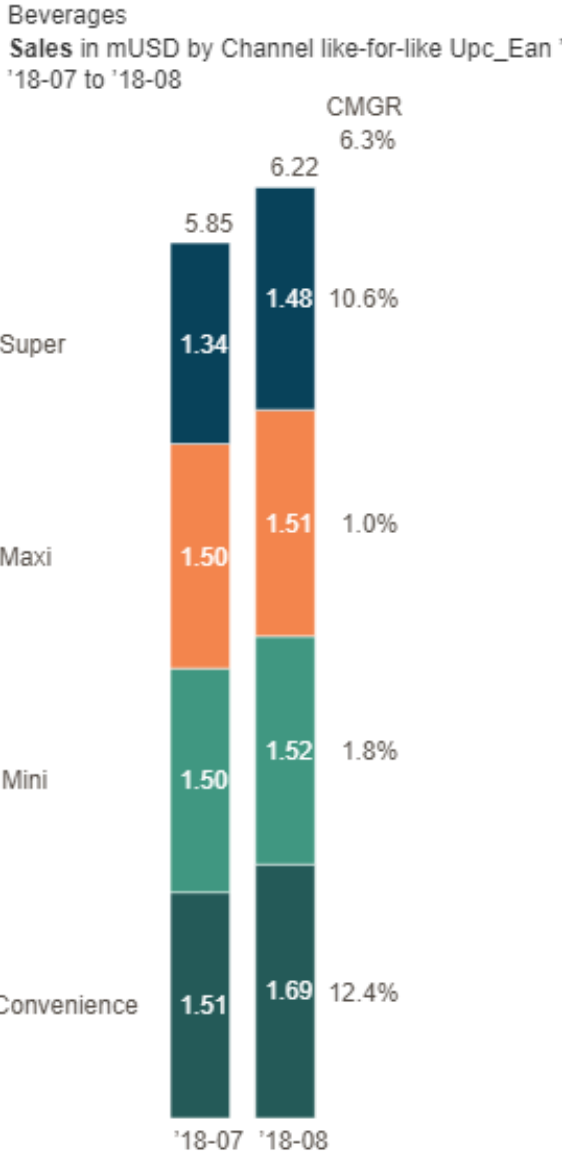
Despite the mixed performance across regions, overall sales grew at 6.3%. The Nord region had the highest growth at 33.1%, followed by Sud at 27.0% and Centro at 20.4%. These regions showed significant momentum. On the other hand, Deutsche Schweiz was almost flat at 0.1%, while Suisse Romande and Svizzera Italiana declined at -2.2% and -5.4% respectively.



Penny's sales grew an impressive 30.7%, the highest among supermarket chains, surpassing Tesco and nearing Aldi and Lidl by August 2018. Carrefour and Walmart also showed strong growth, at 16.6% and 26.5% respectively. However, Tesco and Lidl saw significant declines, at -17.7% and -7.6%.

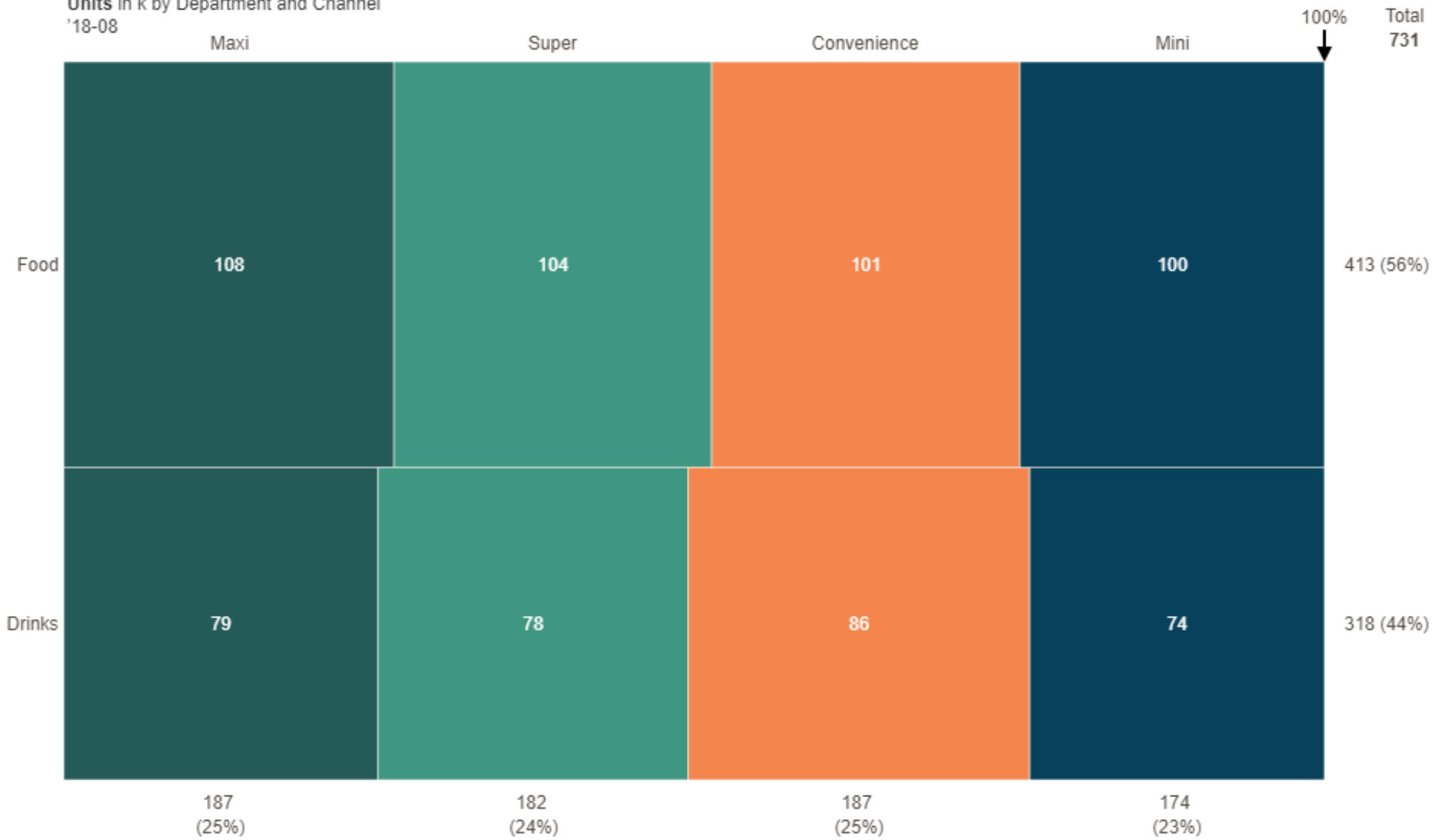


The Convenience and Super channels showed the most significant sales growth, with CMGRs of 12.4% and 10.6% respectively, suggesting stronger consumer preference or better market conditions for these retail formats. In contrast, the Maxi and Mini channels had relatively stagnant growth, with CMGRs of just 1.0% and 1.8%, indicating potential challenges or less favorable conditions.



Executive summary
Index
At a glance
Sales breakdown
Data insights
Trends
Backup

Beverages
Units in k by Department and Channel
'18-08



Beverages

Units in k by Type, Department and Channel
'18-08

No Promo

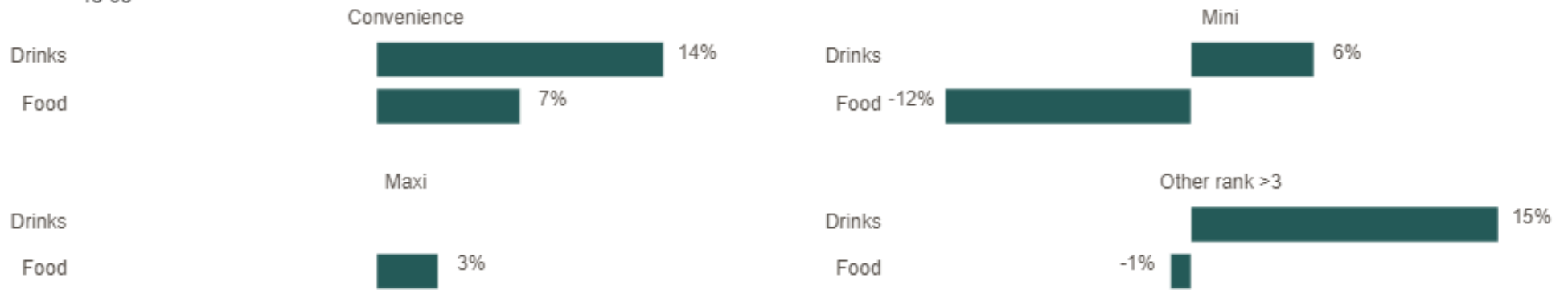


Promo



Beverages

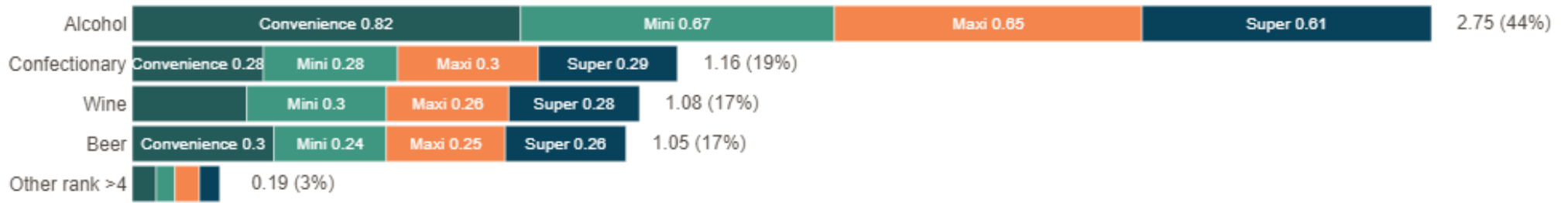
Sales Growth Rate in USD by Channel and Department
'18-08



Beverages

Sales in mUSD by Category and Channel
'18-08

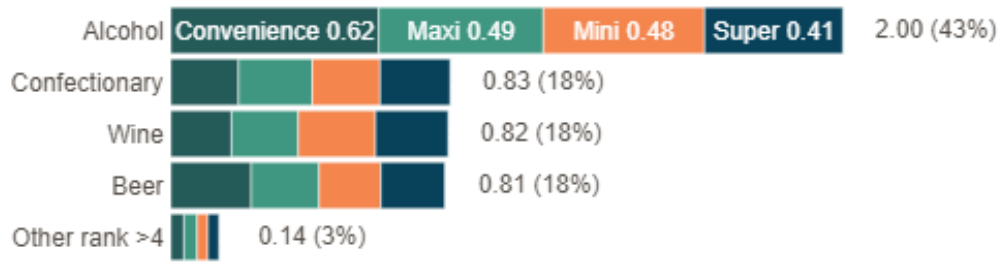
Total
6.22



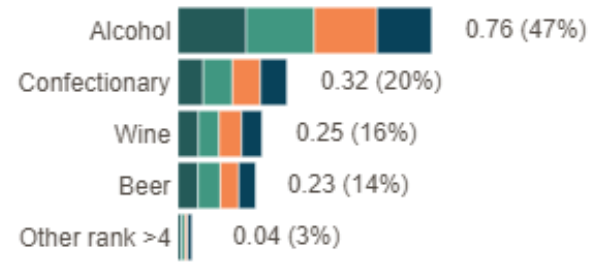
Beverages

Sales in mUSD by Continent, Category and Channel
'18-08

Eurasia



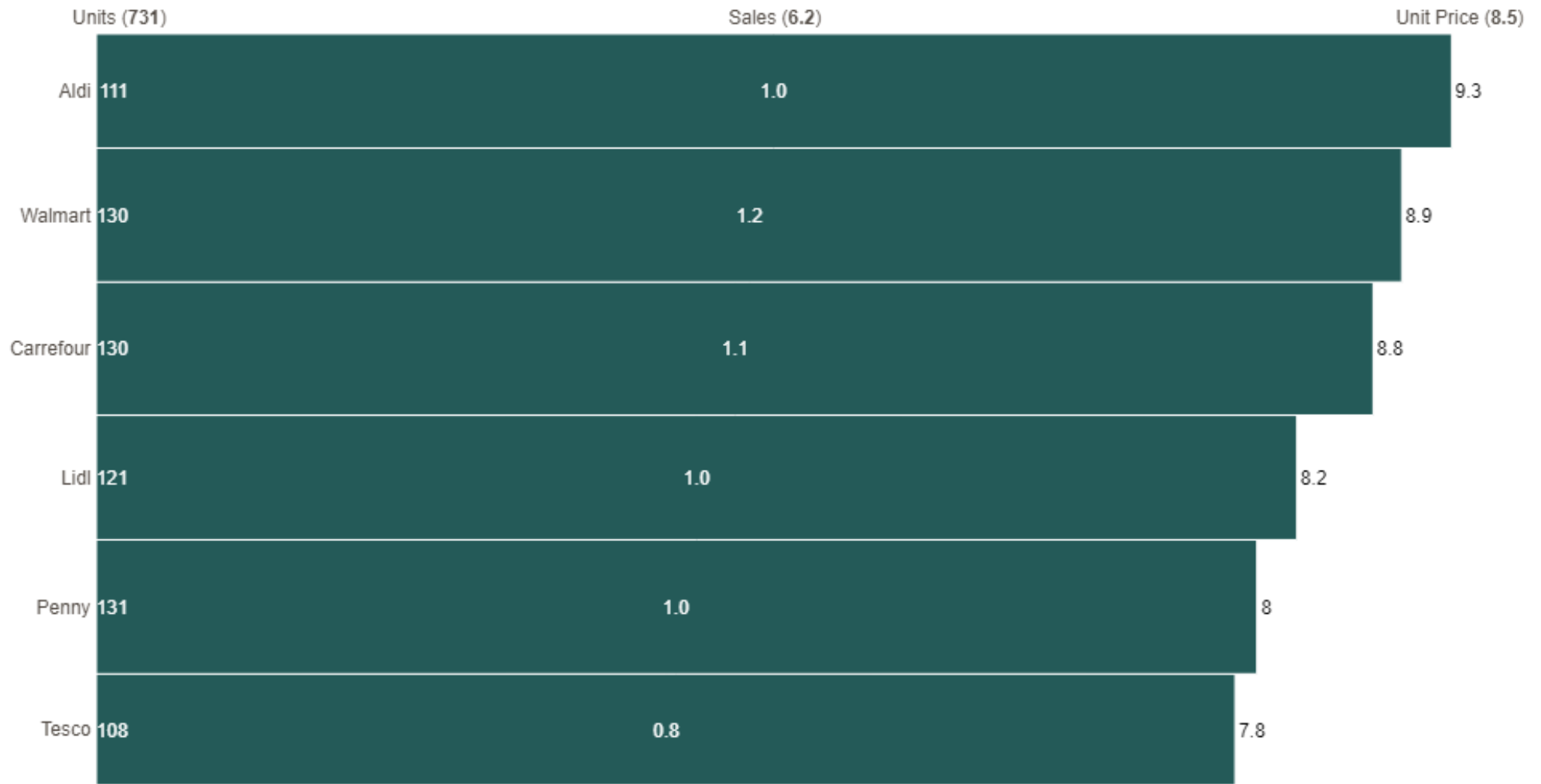
Nordam



Beverages

Bar length: Unit Price in USD by Chain. Bar width: Units in k. Bar area: Sales in mUSD

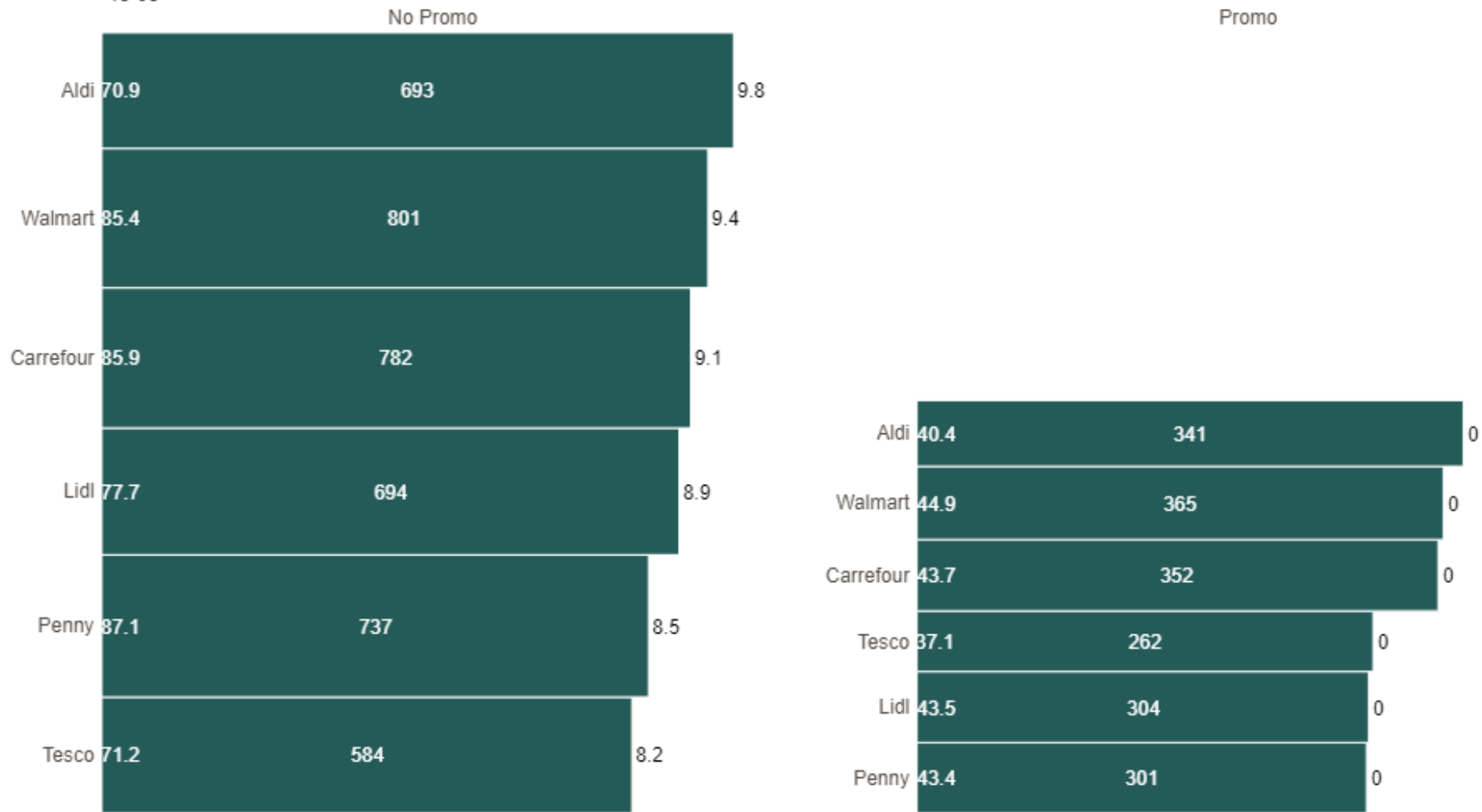
'18-08



Beverages

Bar length: Unit Price in USD by Type and Chain. Bar width: Units in k. Bar area: Sales in kUSD

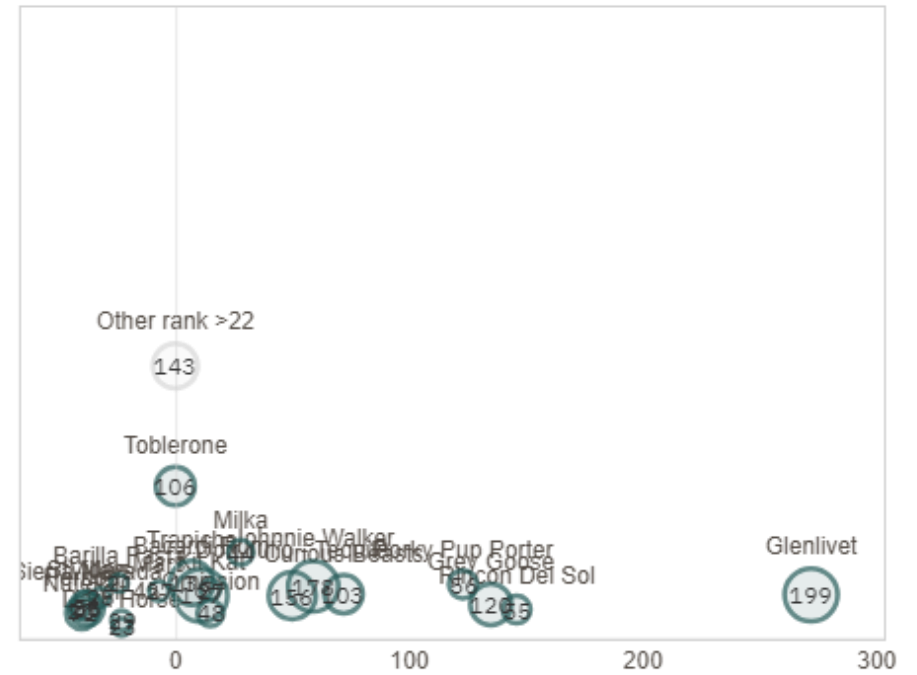
'18-08



Beverages
 Units, Units Growth Rate, Sales in USD by Brand and Type
 '18-08 No Promo



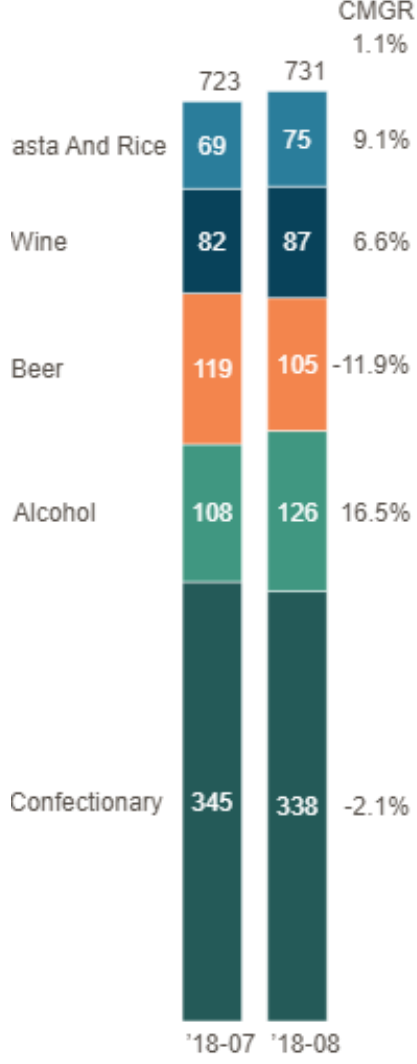
Promo



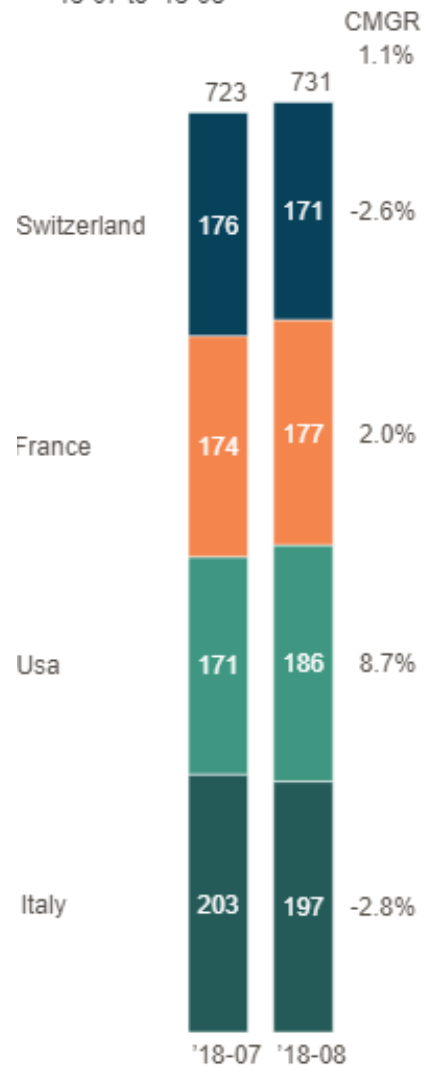
Beverages
Bars: Sales in mUSD. Line: Units in
'18-07 to '18-08
CMGR
6.3%



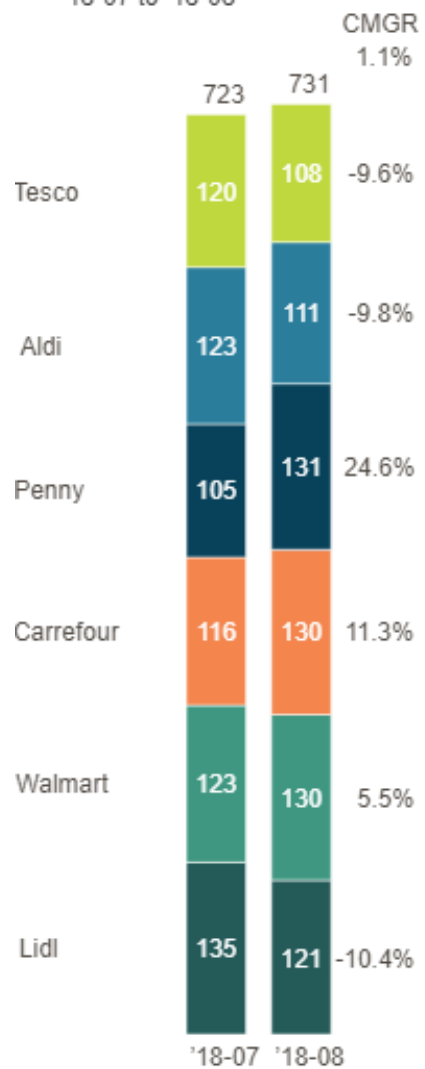
Beverages
 Units in k by Category like-for-like Channel '18-07
 '18-07 to '18-08



Beverages
Units in k by Country
'18-07 to '18-08



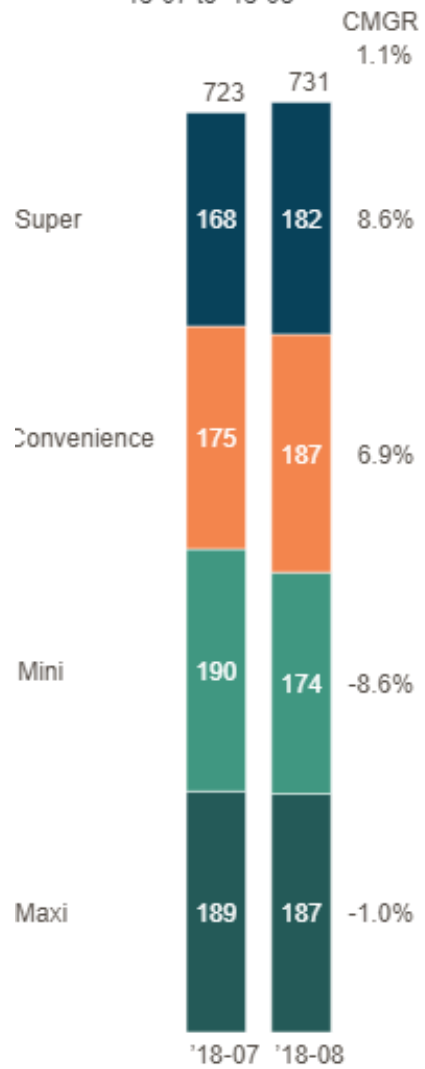
Beverages
Units in k by Chain
'18-07 to '18-08



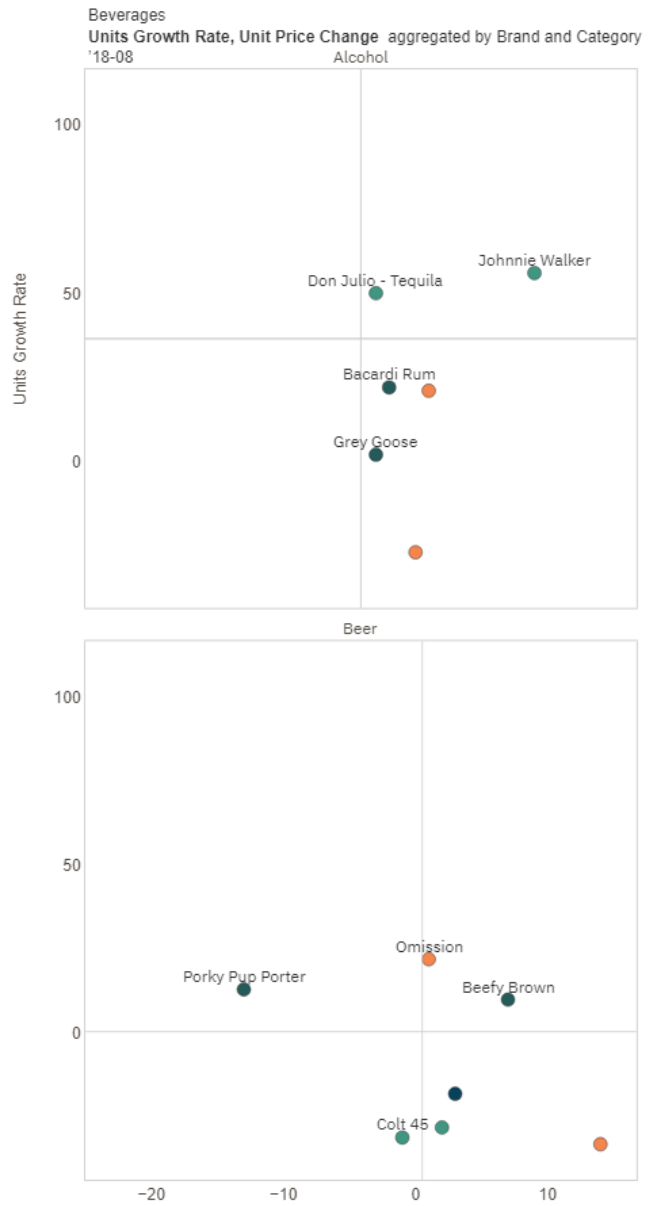
Beverages
Units by Upc_Ean in k
'18-07 to '18-08
CMGR
1.1%



Beverages
Units in k by Channel
'18-07 to '18-08



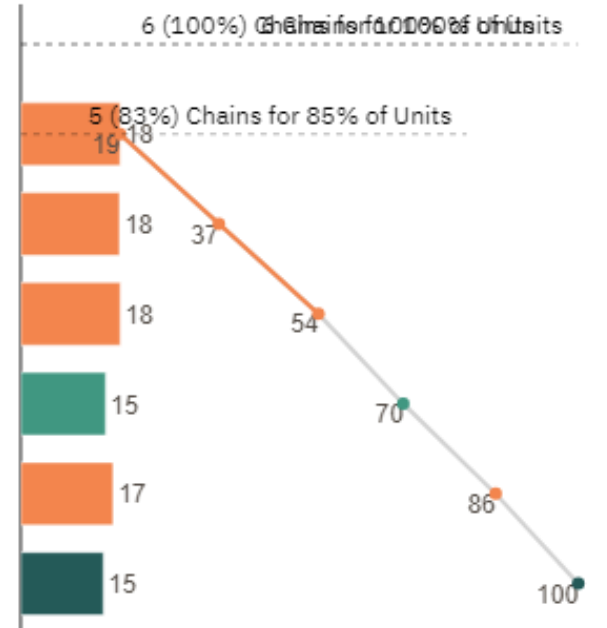
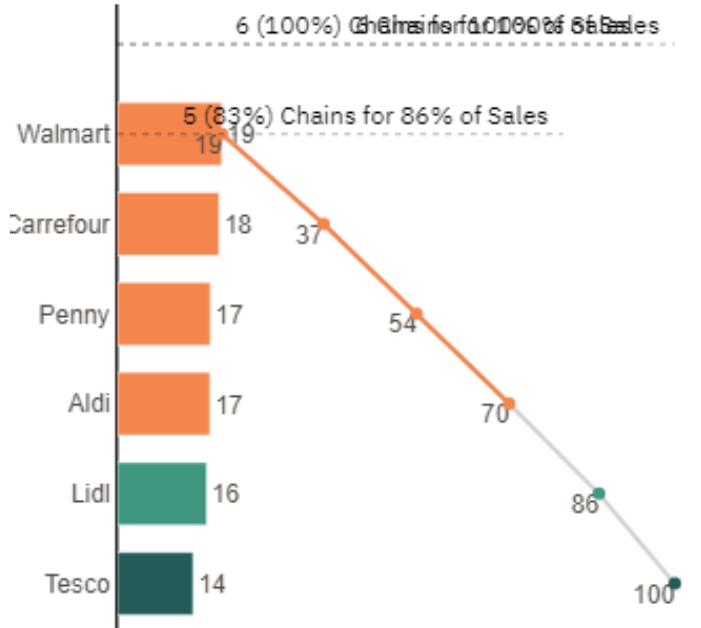
Unit Price Change



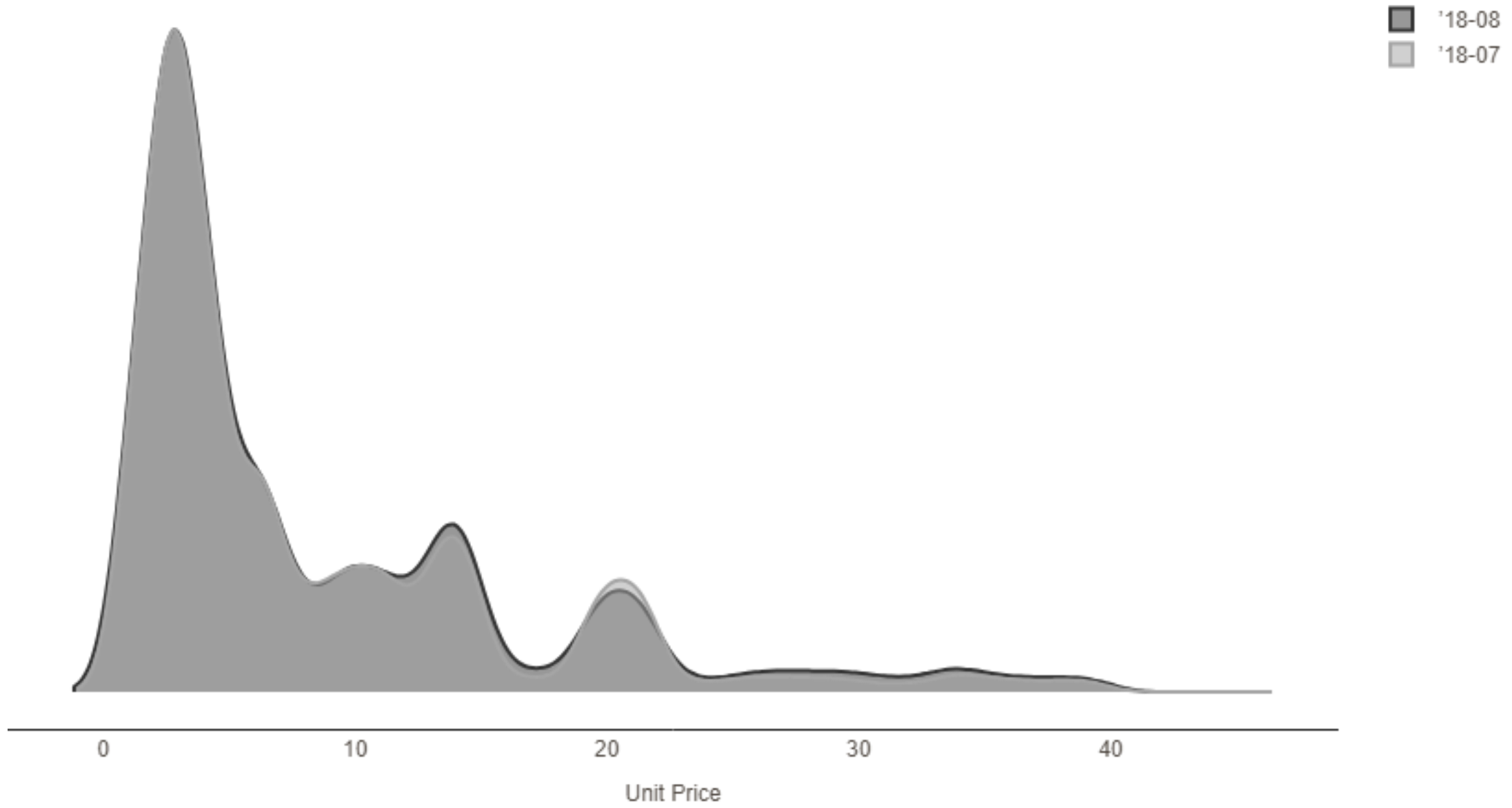
Sales % of total

Units % of total

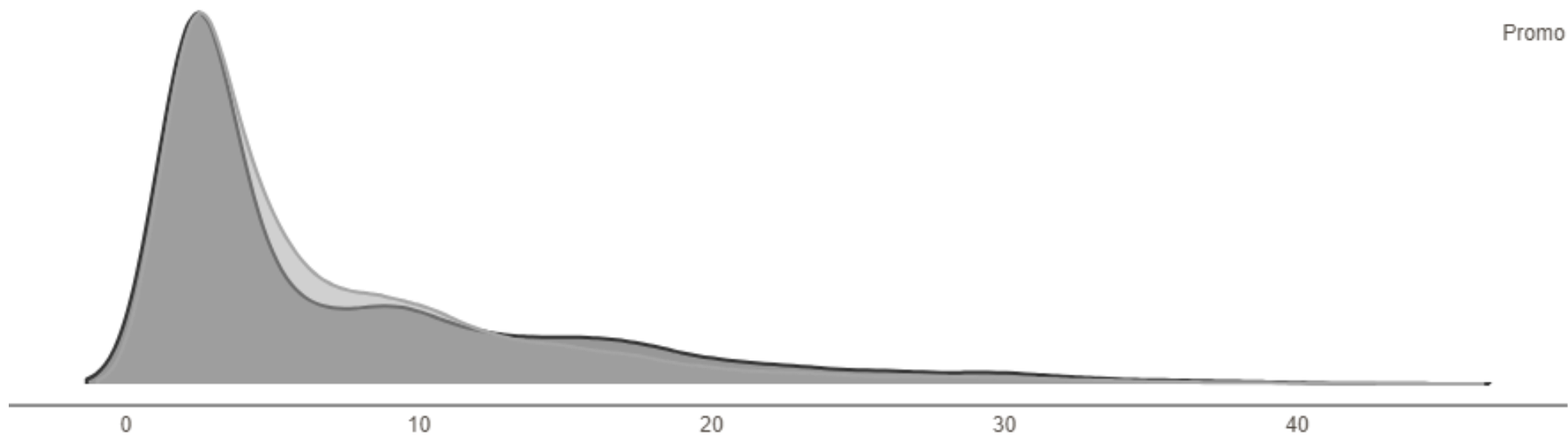
Beverages
 ABC by sorted Chain Sales in USD
 '18-08



Beverages
Unit Price in USD, by observation
'18-07 vs '18-08

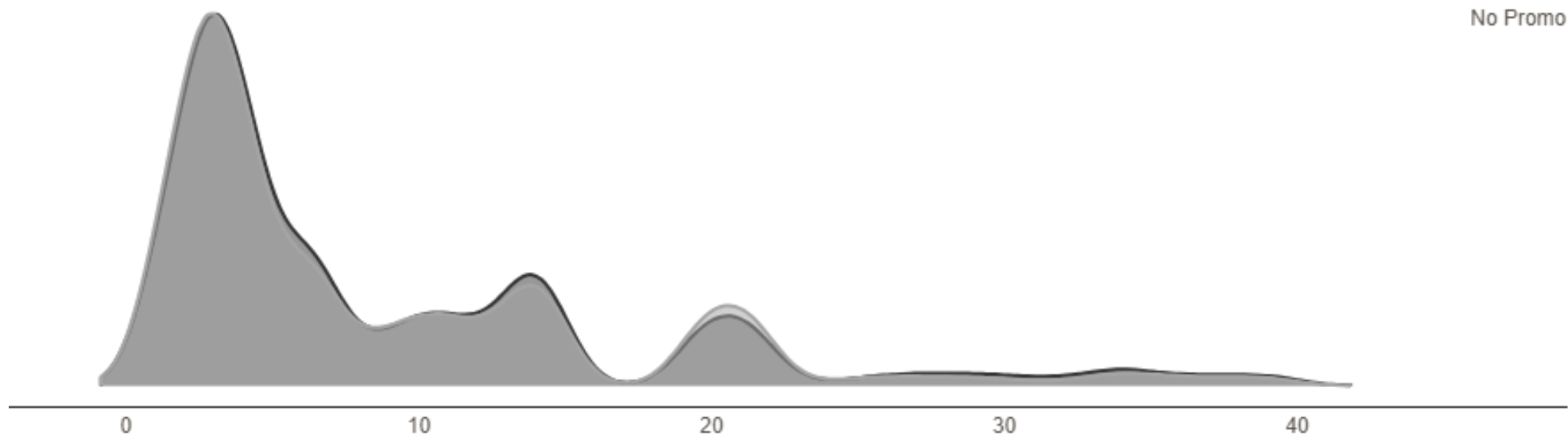


Beverages
Unit Price in USD, by observation by Type
'18-07 vs '18-08



Promo

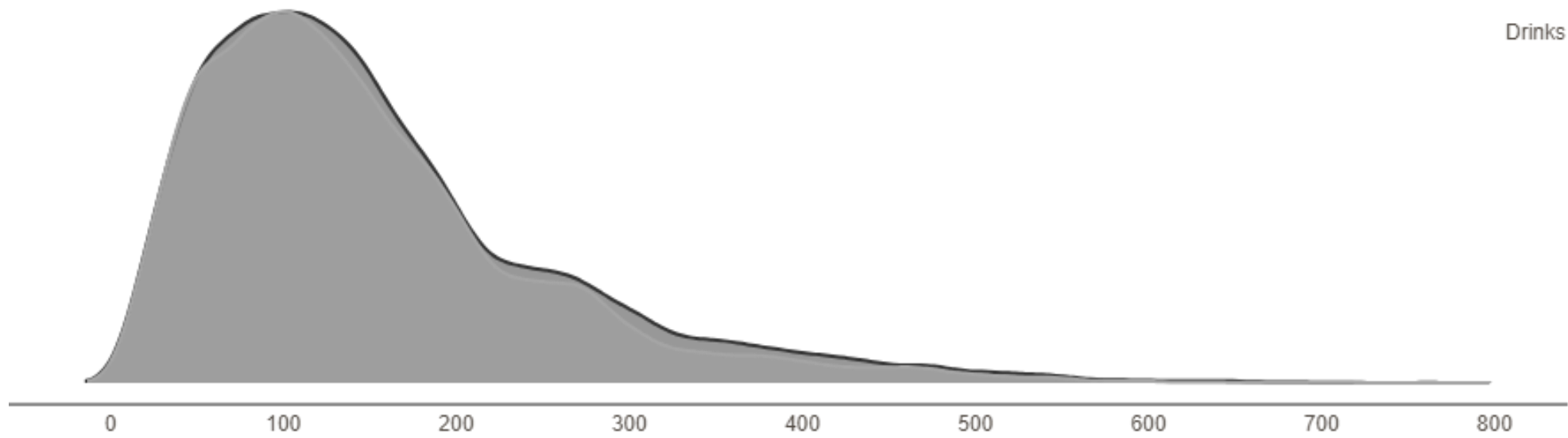
- '18-08
- '18-07



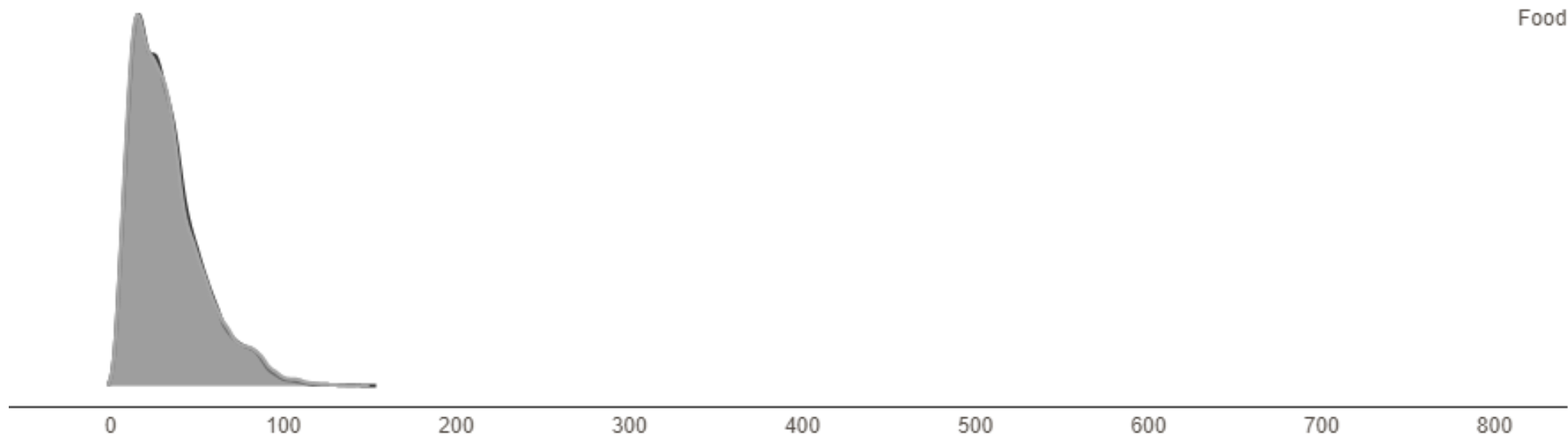
No Promo

Unit Price

Beverages
Sales in USD, by observation by Department
'18-07 vs '18-08



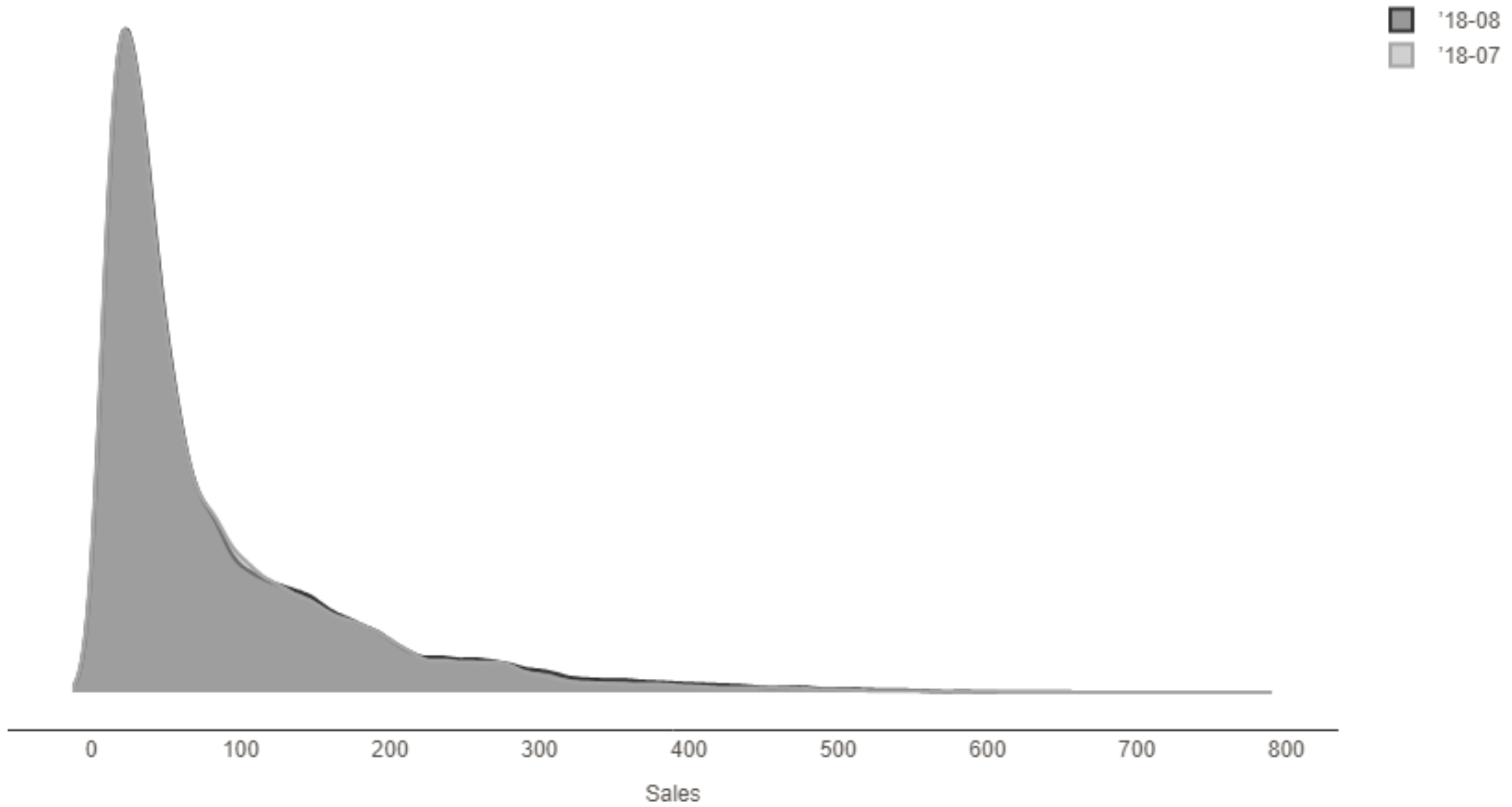
Drinks
■ '18-08
■ '18-07



Food

Sales

Beverages
Sales in USD, by observation
'18-07 vs '18-08



Beverages

Type overlap by Brand

'18-08

