

Claude3 Opus Sales Report
Food, 2012 vs 2013
Prepared: 18 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

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Market Overview

In 2013, the company's food sales in the Middle East region reached an impressive \$28.1 billion. The UAE led the market with a 35% share, while Chocolates dominated the category sales at 33%. Despite challenges in the UAE market for Milk Powder (Tin) and Baby Nutrition categories, the company experienced a \$32.4 million sales increase from 2012 to 2013, driven by positive growth across all regions, particularly in Oman, Qatar, Kuwait, and Saudi Arabia.

Product Performance

Chocolates, Milk Powder, and Baby Nutrition were the top-selling categories in the Middle East, with the 'Category' entity outperforming Nestlé Middle East in sales growth. Sharing and Countlines subcategories exhibited strong growth across all markets, while Infant Formula & Gum faced difficulties. The UAE served as a regional distribution hub with diverse sales, leading in both units sold and total sales, while Oman generated higher sales despite lower unit prices compared to KSA and Bahrain.

Regional Insights

Oman and Qatar showed remarkable Food sales growth in 2013, with Al Bur and an unknown city in the 'Other rank >3' market leading the way. Most outlets experienced positive unit growth, but geo-market variations were evident. The UAE and Oman displayed stable pricing and minimal unit growth, while Qatar outlets showed a range of price adjustments. The top 20 outlets contributed 79% of total units and sales, and regions outside the top 5 collectively represented a substantial opportunity.

Growth Strategy

To sustain growth, it's crucial to address the UAE's sales decline while capitalizing on the success of high-growth markets like Kuwait, Qatar, and KSA, as well as top-performing product categories. By focusing on these key areas and adapting to regional market dynamics, the company can continue to drive impressive results in the Middle East food sales sector.

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At a glance: The company's food sales in the Middle East region reached \$28.1 billion in 2013, with the UAE leading at 35% of market share, and Chocolates dominating at 33% of category sales. From 2012 to 2013, sales increased by \$32.4 million, driven by positive growth across all regions, especially in Oman, Qatar, Kuwait, and Saudi Arabia, despite challenges in the UAE market for Milk Powder (Tin) and Baby Nutrition categories. Sharing and Countlines subcategories exhibited strong growth across all markets, while Infant Formula & Gum faced difficulties, and specific cities and outlets like Doha, Gharafa, Lulu Hyper in Doha, and Bousher demonstrated robust performance. Pages 8 to 14.

Sales breakdown: The 2013 sales data highlights strong market preferences for Chocolates, Milk Powder, and Baby Nutrition across the Middle East, with the 'Category' entity outperforming Nestlé Middle East in sales growth. Sales are concentrated in Saudi Arabia, Qatar, and Oman, while the UAE serves as a regional distribution hub with diverse sales. The UAE leads in both units sold and total sales, and Oman generates higher sales despite lower unit prices than KSA and Bahrain. Pages 16 to 24.

Data insights: Oman and Qatar showed strong Food sales growth in 2013, with Al Bur and an unknown city in the 'Other rank >3' market leading the way, while the UAE had mixed results despite high sales volumes. Most outlets saw positive unit growth, but geo-market variations were evident, with UAE and Oman showing stable pricing and minimal unit growth, while Qatar outlets displayed a range of price adjustments. The top 20 outlets contributed 79% of total units and sales, and while Qatar emerged as a dominant single market, regions outside the top 5 collectively represented a substantial opportunity. Pages 26 to 32.

Trends: The business experienced strong overall growth from 2012 to 2013, with impressive performance in specific product categories and geographic markets like Kuwait, Qatar, and KSA. However, the UAE market saw a sales decline despite being the largest, contrasting the positive trends in other regions. To sustain growth, it's crucial to address the UAE's decline while capitalizing on the success of high-growth markets and products. Pages 34 to 39.

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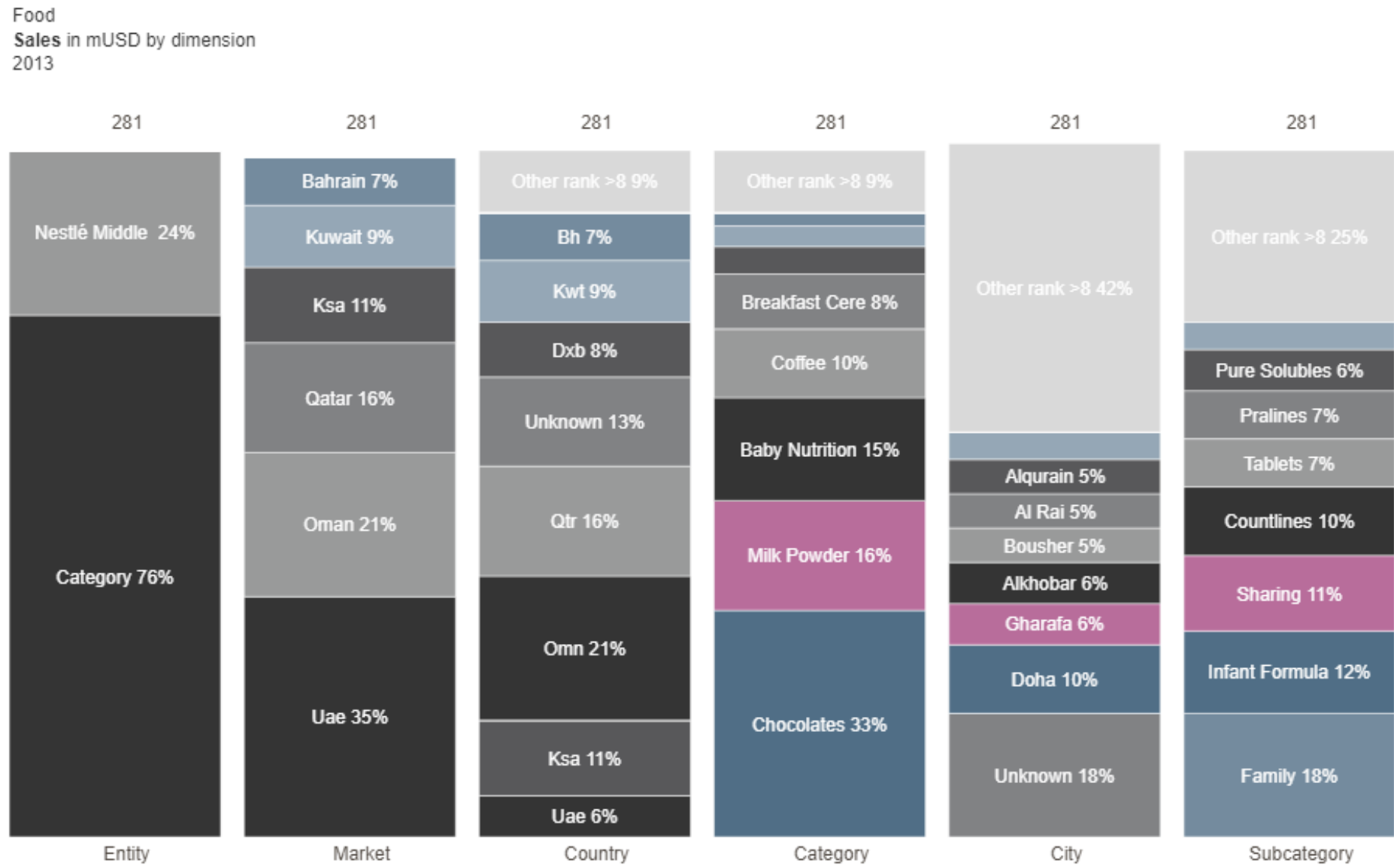
Backup

The company's food sales in the Middle East region reached \$28.1 billion in 2013, with the UAE leading at 35% of market sales, followed by Oman and Qatar. Chocolates dominate at 33% of category sales, with Milk Powder and Baby Nutrition also being significant contributors (p.9). From 2012 to 2013, the company's sales increased by \$32.4 million, driven by a positive variance in Units & Mix of \$38.1 million, partially offset by a negative variance in Price of \$5.8 million (p.10). Each country saw higher total sales during this period, with positive growth across all regions, primarily driven by Units & Mix, especially in Oman, Qatar, Kuwait, and Saudi Arabia (p.11).

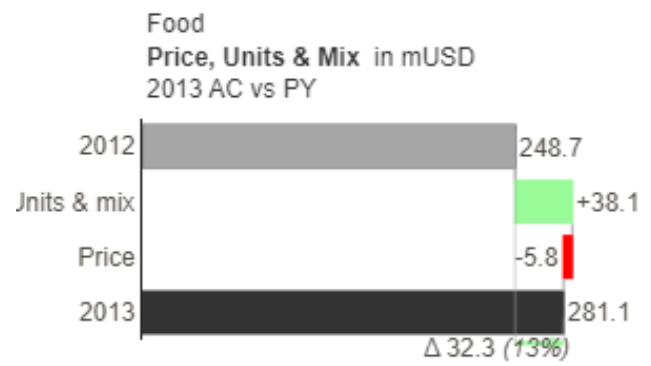
A variance analysis reveals that the overall sales increase was largely attributed to strong performances in Qatar, Oman, Kuwait, and Saudi Arabia. However, the UAE market faced a notable setback in the Milk Powder (Tin) segment, emphasizing the need for tailored regional strategies and product offerings based on local market conditions and consumer preferences (p.12). The company's food sales from 2012 to 2013 showed positive trends in most markets and product categories, with Saudi Arabia, Qatar, and Oman experiencing notable growth. Chocolates, Coffee, and Milk Powder performed well, while the UAE and Baby Nutrition category saw declines. Specific cities and outlets, such as Doha, Gharafa, Lulu Hyper in Doha, and Bousher, demonstrated strong growth, and the Minis and Pouch segments grew robustly (p.13).

Sharing and Countlines subcategories exhibited strong growth across all markets from 2012 to 2013, indicating a consumer trend. However, Infant Formula & Gum faced challenges, declining or barely growing in most markets, possibly due to saturation or competition. The UAE experienced a mixed performance, with significant drops in areas like Family products, while Oman and Qatar showed growth in almost every subcategory (p.14).

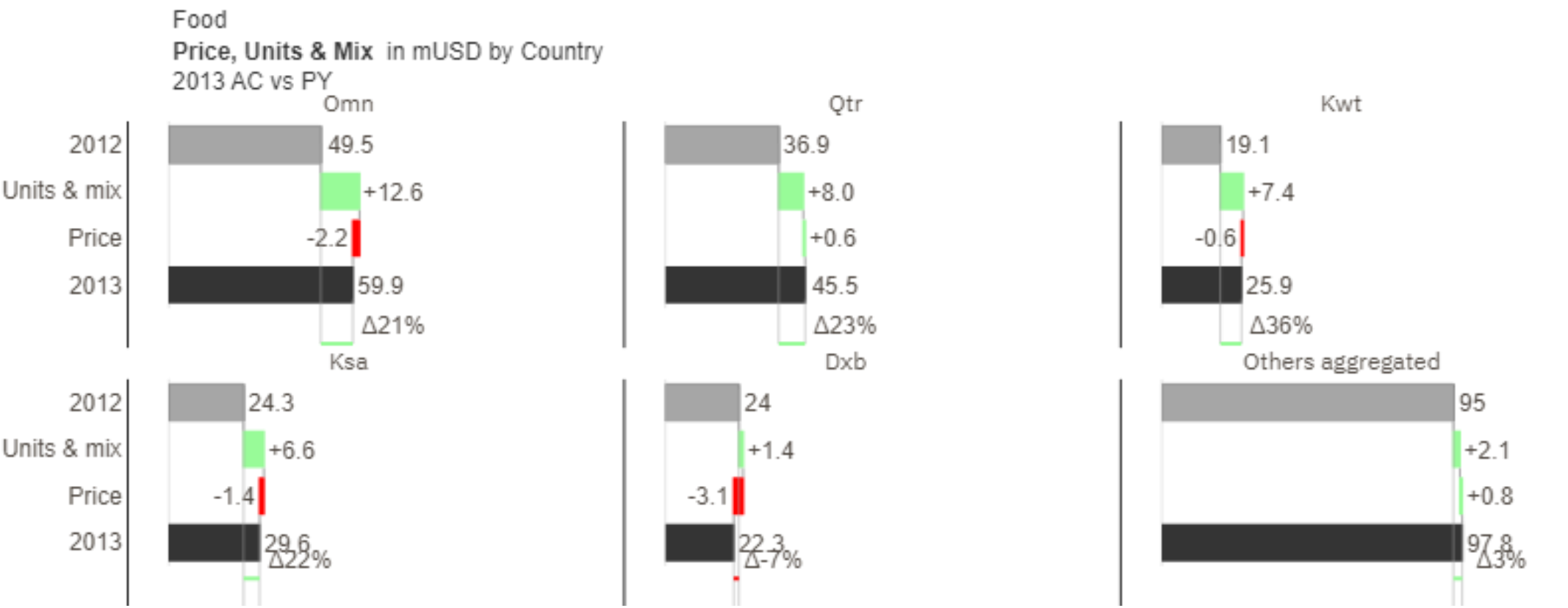
The company's food sales in the Middle East region hit \$28.1 billion in 2013. The UAE leads with 35% of market sales, followed by Oman and Qatar. Chocolates dominate at 33% of category sales, with Milk Powder and Baby Nutrition also being significant contributors. Sales are concentrated in specific countries, with Oman, Qatar, and Saudi Arabia leading.



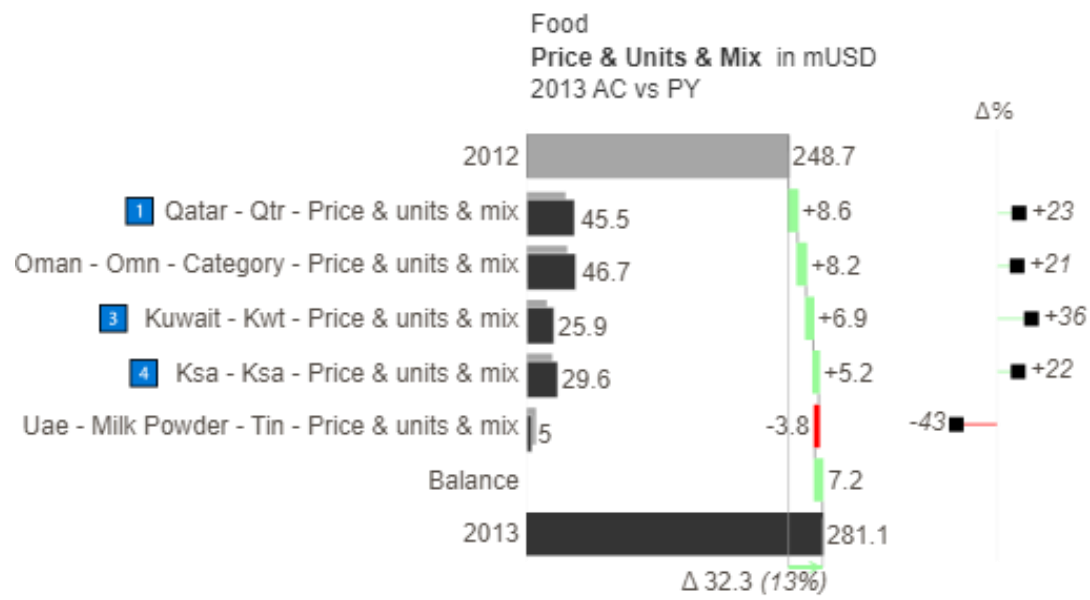
From 2012 to 2013, the company's sales increased by \$32.4 million. This growth was driven by a positive variance in Units & Mix of \$38.1 million, partially offset by a negative variance in Price of \$5.8 million.



Each country saw higher total sales from 2012 to 2013, with positive growth across all regions. Units & Mix drove the growth, especially in Oman, Qatar, Kuwait, and Saudi Arabia. Price changes had a mixed impact, hurting sales in Oman, Kuwait, and Dubai, but slightly helping in Qatar and the 'Others' category.

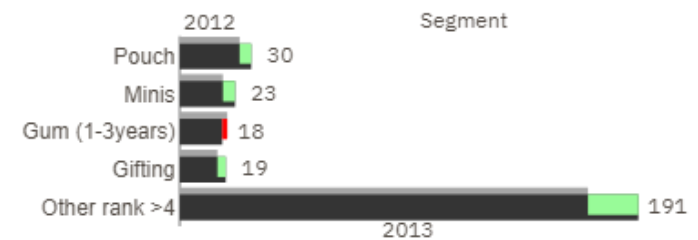
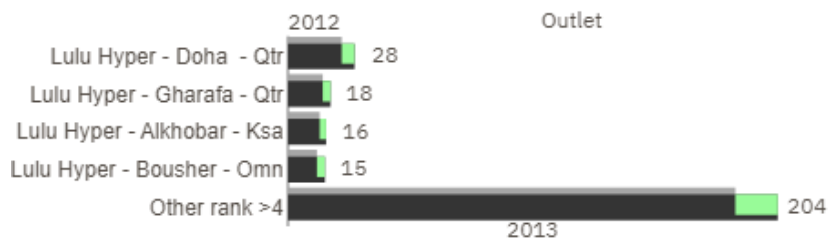
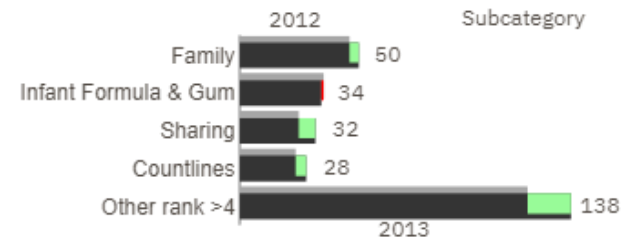
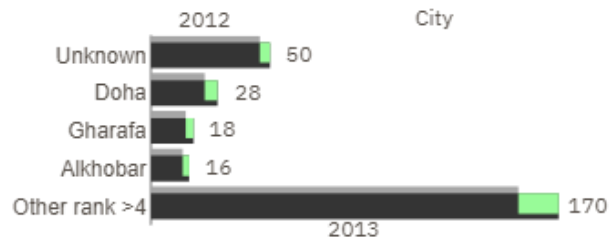
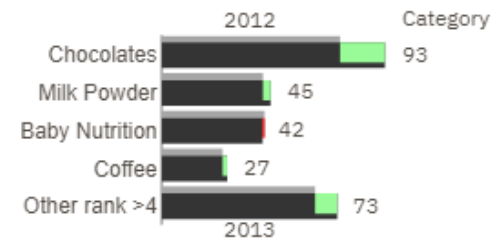
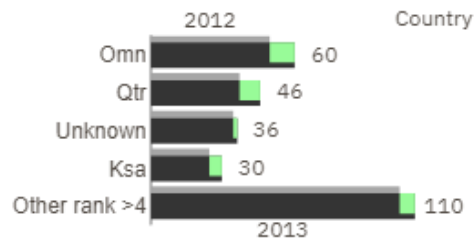
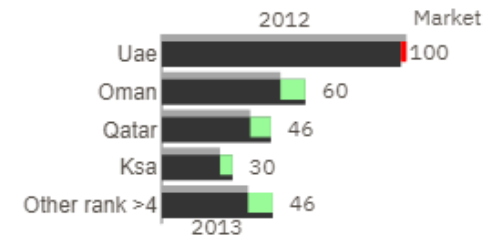
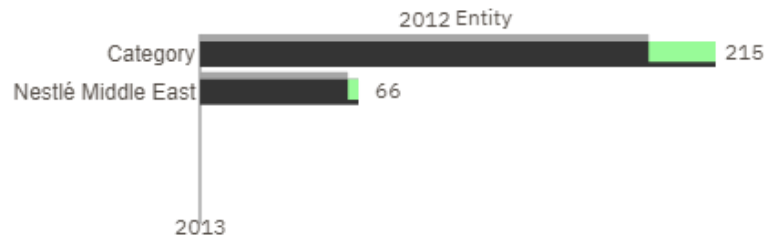


A variance analysis of the company's sales from 2012 to 2013 shows the overall sales increase was largely driven by strong performances in Qatar, Oman, Kuwait, and Saudi Arabia. However, the UAE market had a notable setback in the Milk Powder (Tin) segment. Regional strategies and product offerings should be tailored to local market conditions and consumer preferences. Product-specific challenges, like those faced in the UAE Milk Powder (Tin) segment, can significantly impact overall sales performance.

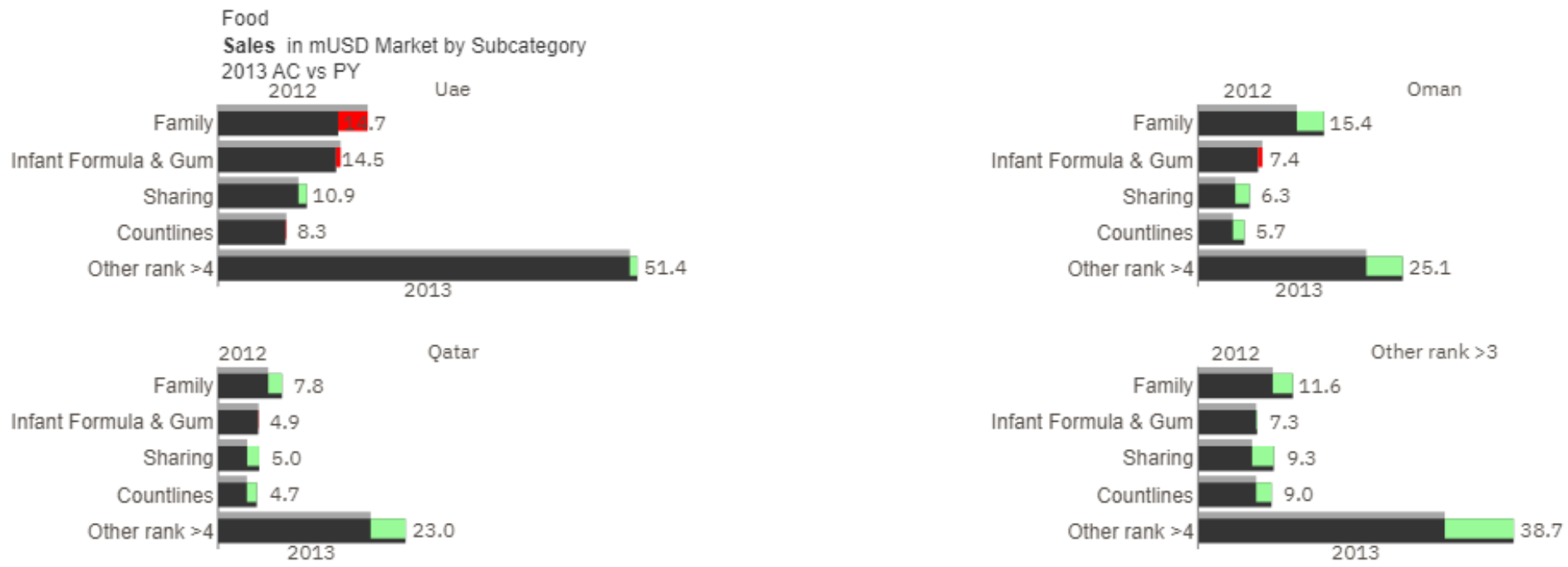


The company's food sales from 2012 to 2013 showed positive trends in most markets and product categories. Saudi Arabia, Qatar, and Oman saw notable growth. Chocolates, Coffee, and Milk Powder performed well. However, sales declined in the UAE and Baby Nutrition category. Cities like Doha and Gharafa, and outlets like Lulu Hyper in Doha and Bousher showed strong growth. Minis and Pouch segments grew robustly, while Gum (1-3years) declined significantly.

Food
Sales in mUSD by dimension
2013 AC vs PY



Sharing and Countlines subcategories showed strong growth across all markets from 2012 to 2013, hinting at a consumer trend. But Infant Formula & Gum faced challenges, declining or barely growing in most markets, likely due to saturation or competition. UAE had a mixed bag, with big drops in areas like Family products. Oman and Qatar? They killed it, growing in almost every subcategory.



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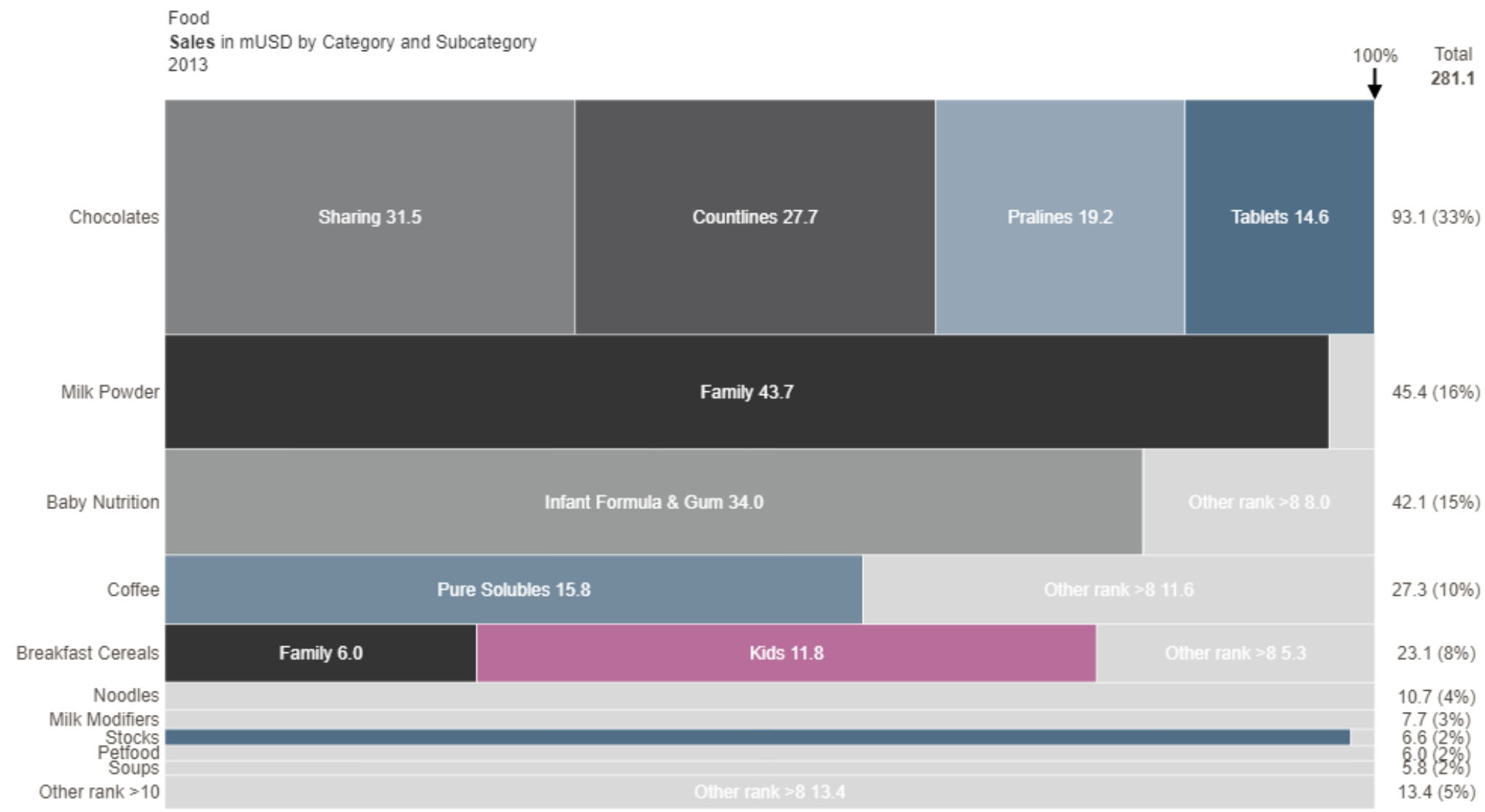
The sales data reveals strong market preferences for Chocolates, Milk Powder, and Baby Nutrition in 2013, with Sharing chocolates and Family milk powder dominating their categories (p.17). The 'Other rank >8' subcategory captures the majority of sales across UAE, Oman, Qatar, and other markets, while the 'Family' subcategory significantly contributes to Milk Powder sales, particularly in UAE, Oman, and Qatar (p.18).

In 2013, the 'Category' entity outperformed the average sales growth rate and Nestlé Middle East (p.19). Nestlé Middle East experienced negative growth in the UAE but positive growth in Oman, Qatar, and other markets. However, the 'Category' consistently outperforms Nestlé Middle East in sales growth across all markets (p.20).

Sales are highly concentrated in Saudi Arabia, Qatar, and Oman, with each country showing sales entirely from within their borders. The UAE has a more diverse sales distribution, suggesting a more varied market or its role as a regional distribution hub (p.21). The 'Category' has higher sales than 'Nestlé Middle East' in the same markets, likely due to a broader product range or stronger market penetration (p.22).

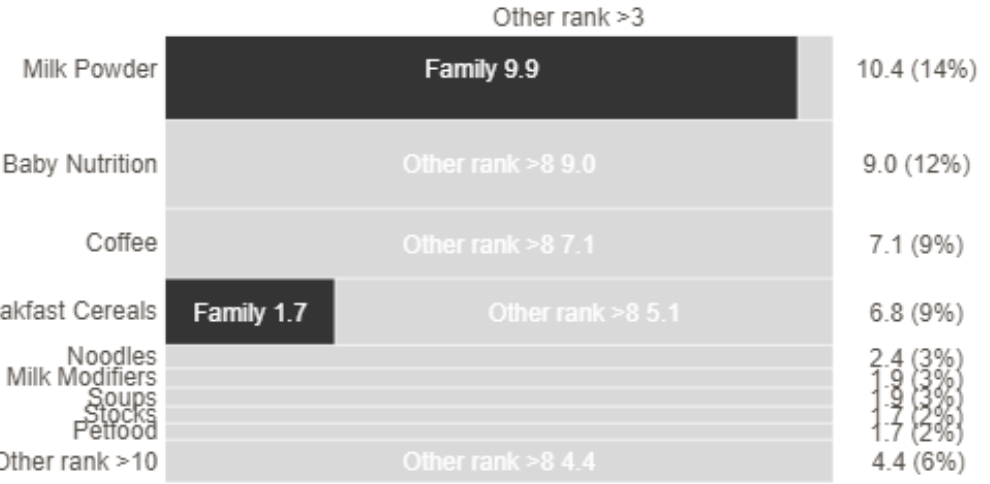
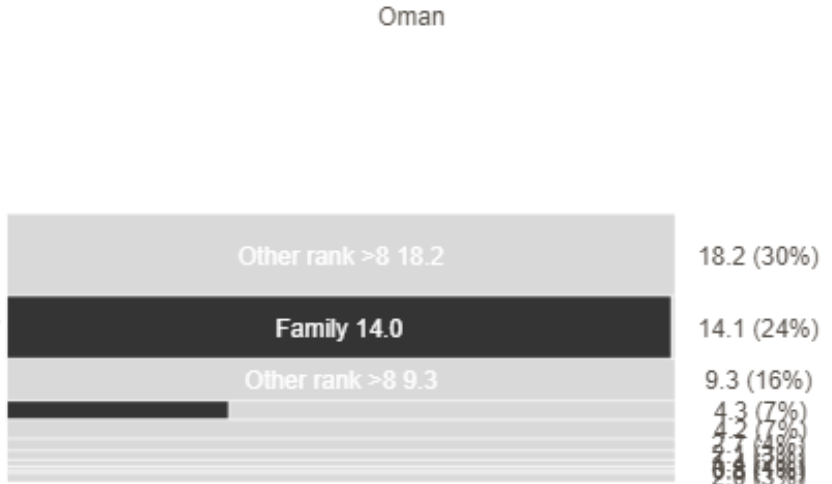
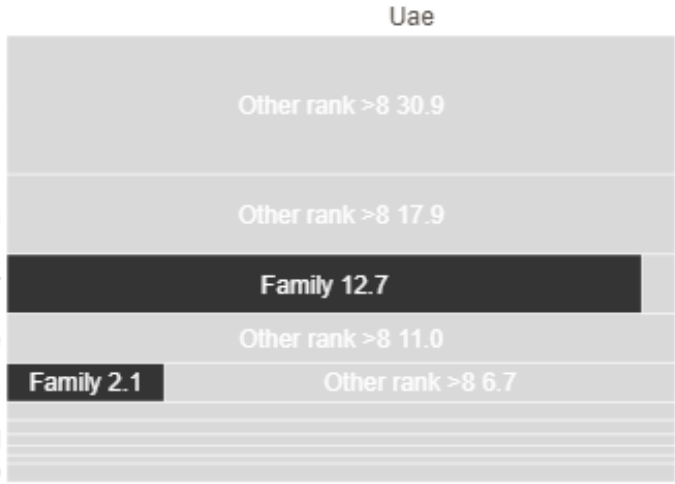
UAE leads in both units sold and total sales, indicating strong demand and market size. Oman generates significantly higher sales despite a slightly lower unit price than KSA and Bahrain, suggesting effective sales conversion (p.23). UAE is the most significant market for both 'Category' and 'Nestlé Middle East', with the highest units sold and sales figures. Across all markets, 'Category' consistently shows higher units sold and sales than 'Nestlé Middle East', indicating stronger market penetration or a broader product portfolio (p.24).

Chocolates, Milk Powder, and Baby Nutrition were the top three categories in the business's 2013 sales data, showing strong market preferences. Sharing chocolates and Family milk powder dominated their categories, suggesting targeted consumer preferences. Infant Formula & Gum in Baby Nutrition and Family Milk Powder showed high specialization, indicating focused consumer needs and possibly less competition in these niches.



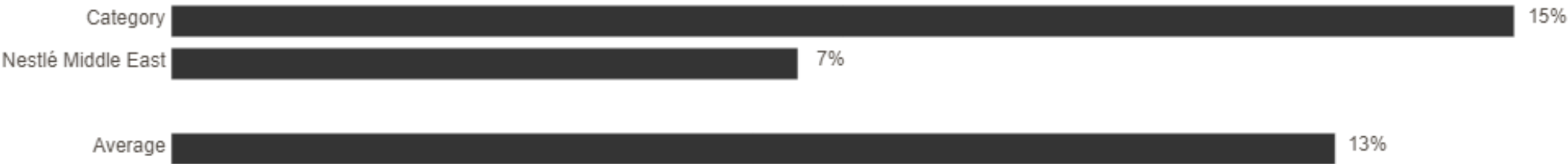
Across UAE, Oman, Qatar, and other markets, most sales come from the 'Other rank >8' subcategory, which captures a broader range of products. The 'Family' subcategory significantly contributes to Milk Powder sales, especially in UAE, Oman, and Qatar, suggesting a strong brand or product preference among families in this category.

Food
Sales in mUSD by Market, Category and Subcategory
2013

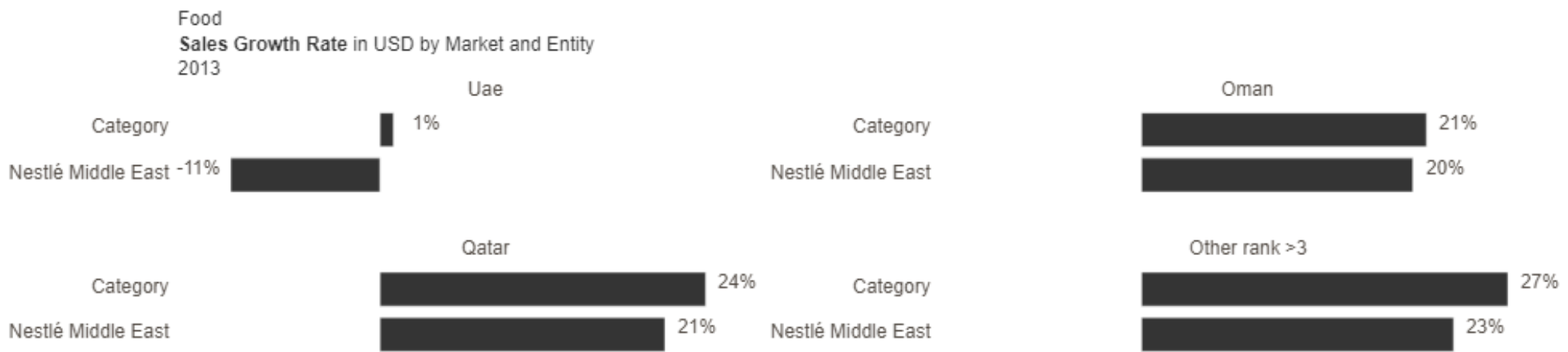


In 2013, the 'Category' entity grew 15.0%, outperforming the average sales growth rate of 13.0%. Meanwhile, Nestlé Middle East underperformed at 7.0%.

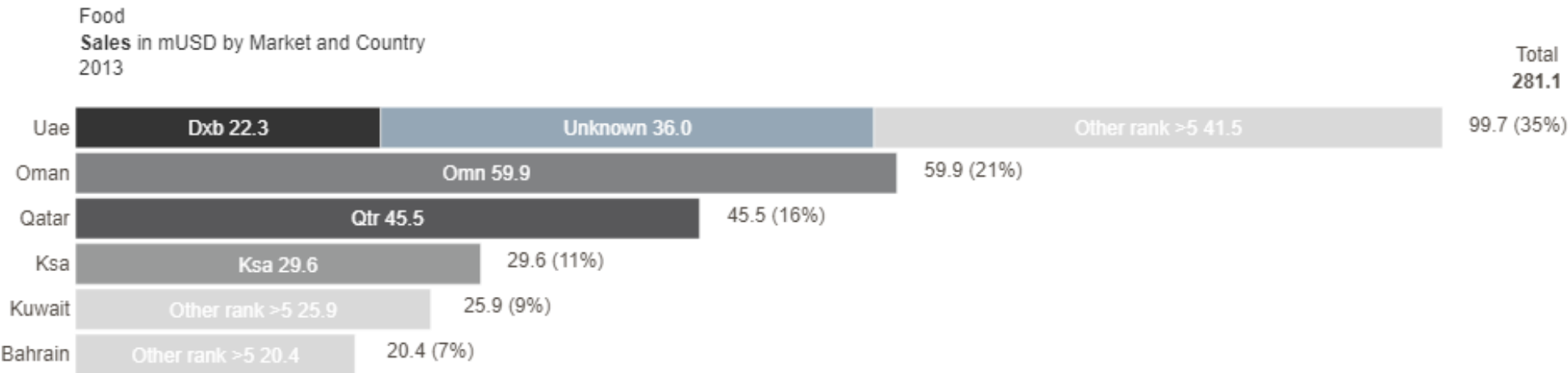
Food
Sales Growth Rate in USD by Entity
2013



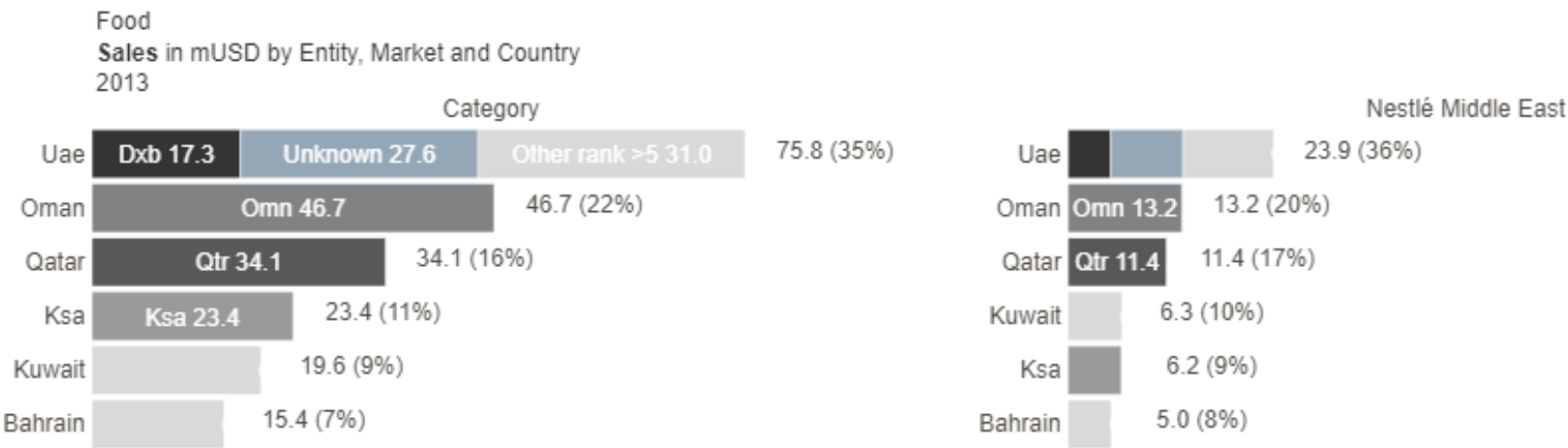
Nestlé Middle East saw a -11.0% growth rate in the UAE, contrasting with positive growth in Oman, Qatar, and other markets. Across all markets, the 'Category' consistently outperforms Nestlé Middle East in sales growth, suggesting that while Nestlé Middle East is growing, the overall category is growing faster.



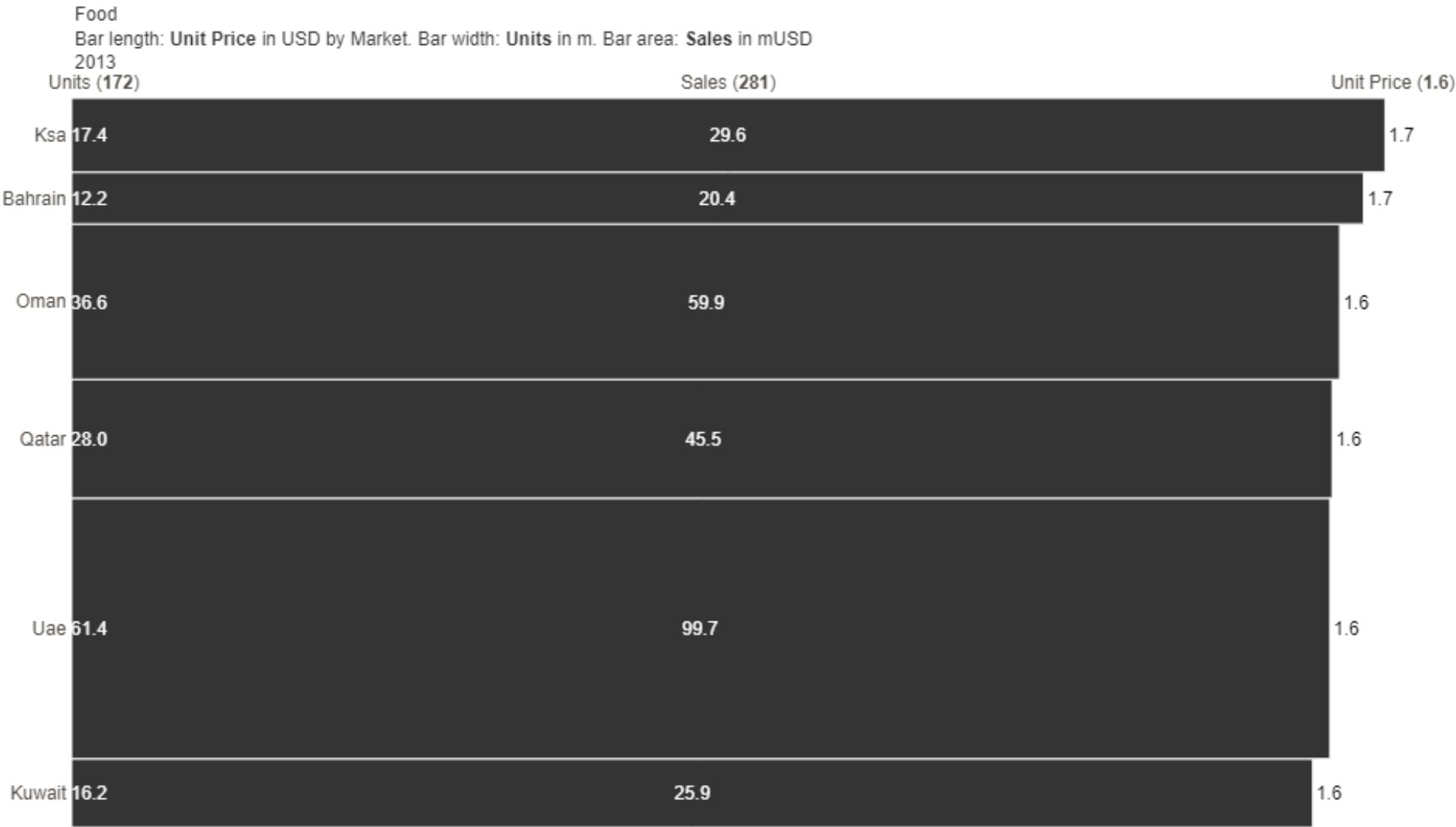
Sales are highly concentrated in Saudi Arabia, Qatar, and Oman, with each country showing sales entirely from within their borders. This suggests a strong local market presence or possibly exclusive distribution rights. The UAE has a more diverse sales distribution, with Dubai, an "Unknown" category, and other smaller items making up the total. This points to a more varied market or the UAE serving as a hub for both local and regional distribution.



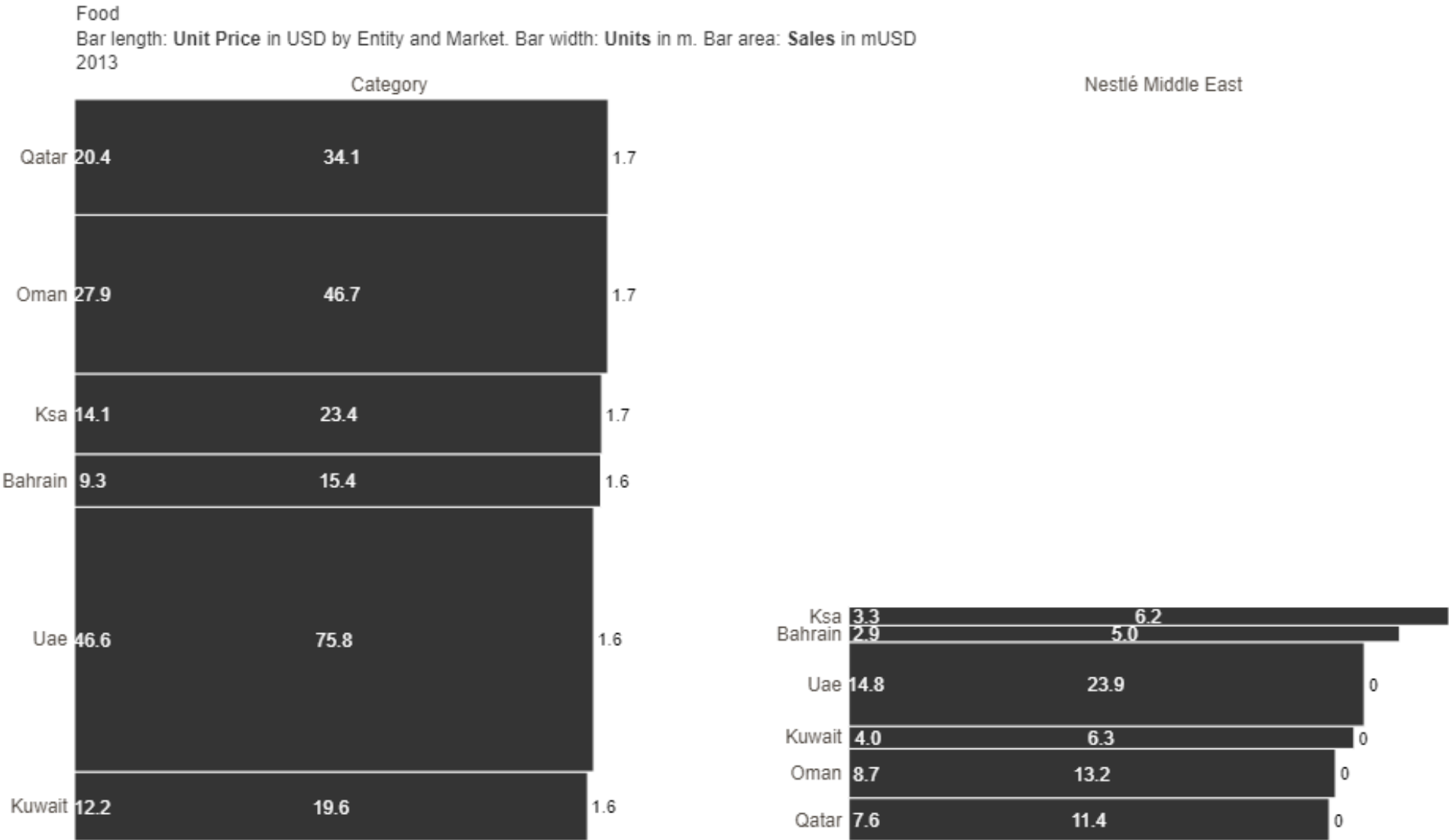
The 'Category' has higher sales than 'Nestlé Middle East' in the same markets, likely due to a broader product range or stronger market penetration. Oman shows significant sales for both, while Qatar and UAE also have substantial figures.



UAE leads in both units sold and total sales, suggesting strong demand and market size. Despite a slightly lower unit price than KSA and Bahrain, Oman generates significantly higher sales, indicating effective sales conversion.



UAE is the most significant market for both 'Category' and 'Nestlé Middle East', with the highest units sold and sales figures. This indicates a strong market presence and possibly higher consumer demand compared to other regions. Across all markets, 'Category' consistently shows higher units sold and sales than 'Nestlé Middle East', suggesting stronger market penetration or a broader product portfolio.



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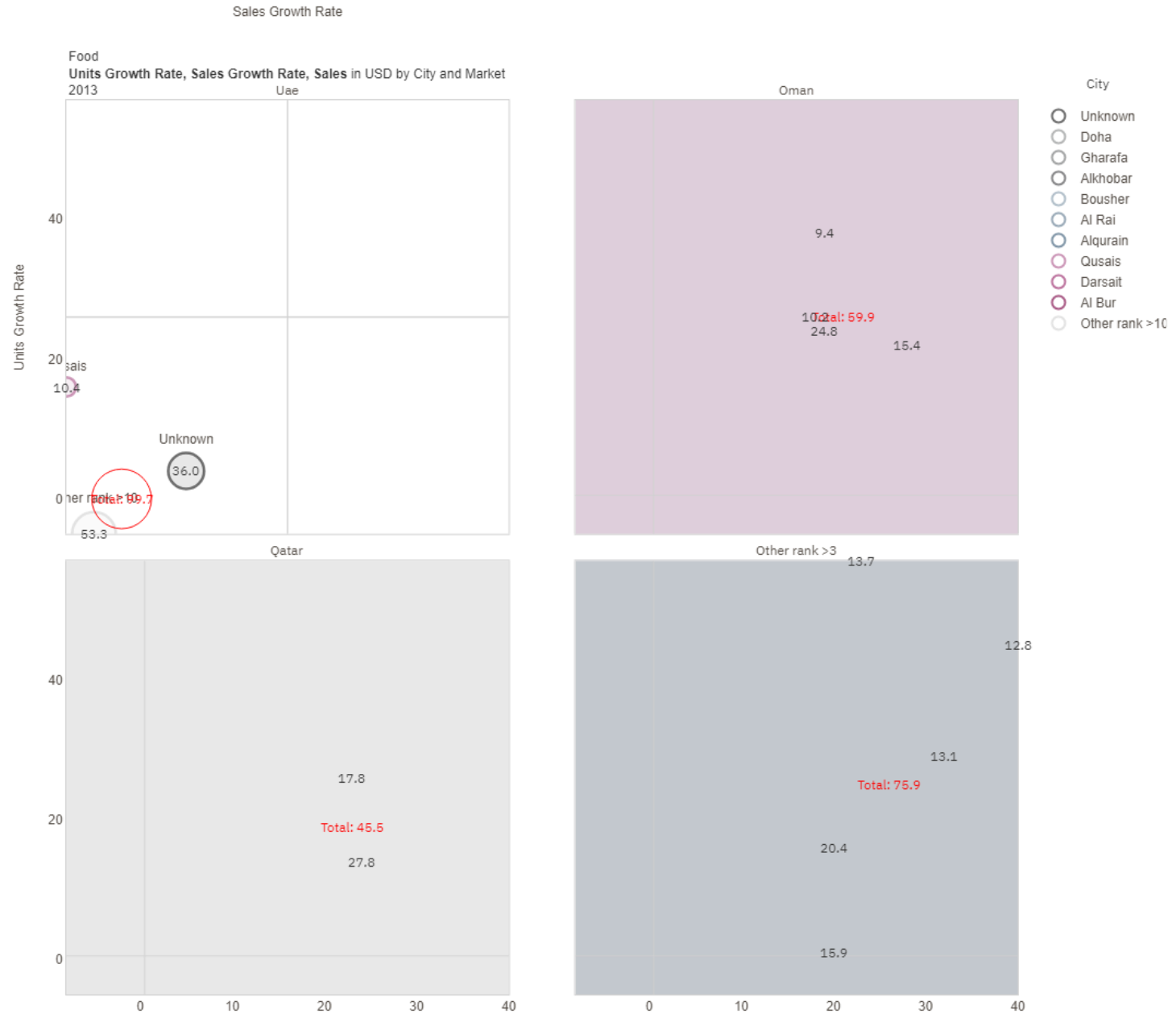
Backup

The Food sales data from 2013 shows strong growth in Oman and Qatar, with Al Bur in Oman and an unknown city in the 'Other rank >3' market performing particularly well. However, the UAE market had mixed results, with some cities experiencing declining growth rates despite high sales volumes, indicating potential market saturation or competitive pressures (p.27). Omn is the top market for Food ABC in terms of sales, units, and number of outlets, but some regions like Unknown have a higher percentage of outlets compared to their sales contribution. The 'Other Rank >7' category, representing smaller regions, also holds a significant portion of sales and units, highlighting the collective importance of these markets (p.28).

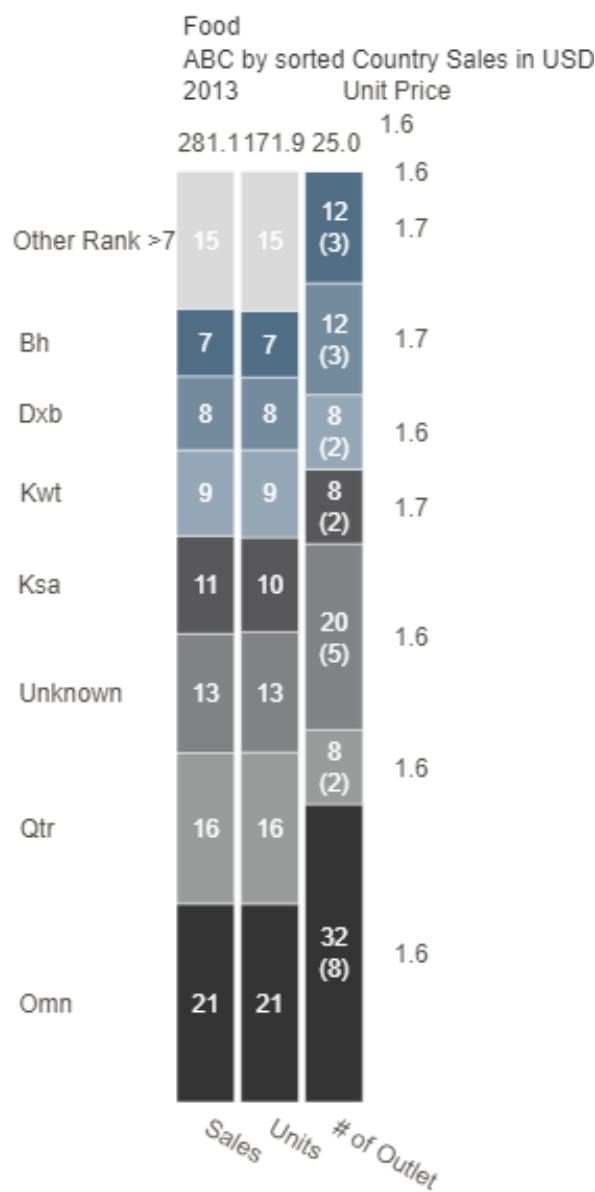
The scatter chart reveals that each outlet performed differently, likely due to local market conditions, competition, and business strategies. Most outlets saw positive unit growth, suggesting healthy markets or effective sales tactics, despite varying price changes (p.29). The small multiples scatter plot analysis emphasizes geo-market variations, with UAE and Oman markets showing stable pricing and minimal unit growth, indicating mature or saturated markets. Qatar outlets display a range of price adjustments, possibly suggesting different strategic responses. Clusters near the origin in most plots indicate potential opportunities for increasing profitability through pricing or sales volume adjustments (p.30).

The top 20 outlets (Class A) contribute 79% of total units and sales, with a consistent distribution suggesting standardized pricing or similar revenue strategies across most outlets. The weak concentration of units and sales indicates a fairly diffuse spread, with relevant contributions from outlets beyond Class A (p.31). Qatar emerges as a dominant single market for Nestlé in the Middle East, while the minimal overlap across all regions suggests distinct market segmentation or tailored strategies by city. Regions outside the top 5 collectively represent a substantial opportunity, underlining the potential of smaller markets that may be under-recognized (p.32).

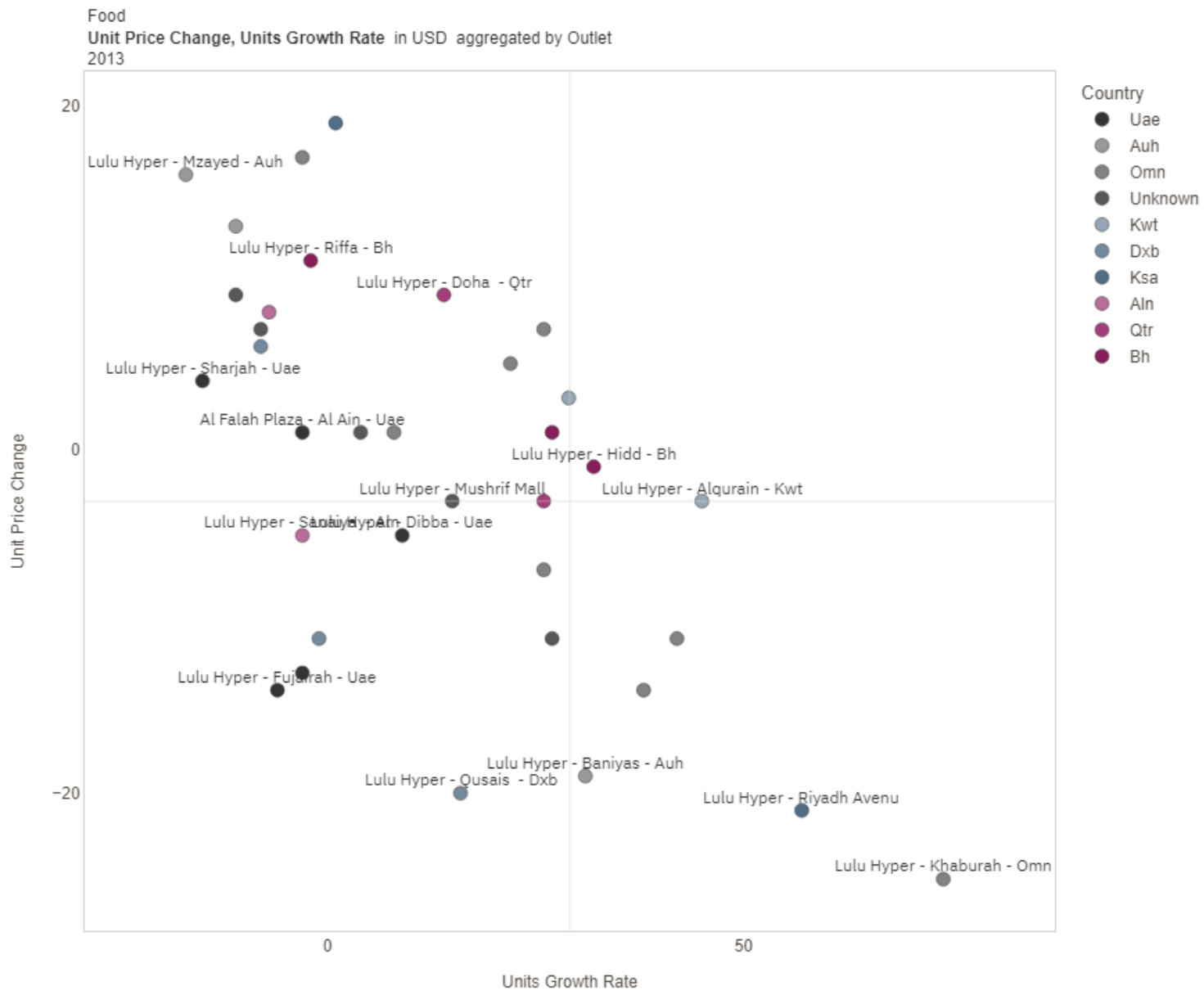
Food sales data from 2013 shows robust growth in Oman and Qatar. Al Bur in Oman and an unknown city in the 'Other rank >3' market had particularly strong sales and units growth rates. However, the UAE market had mixed performance. Qusais and 'Other rank >10' cities saw declining growth rates despite high sales volumes, suggesting potential market saturation or competitive pressures.



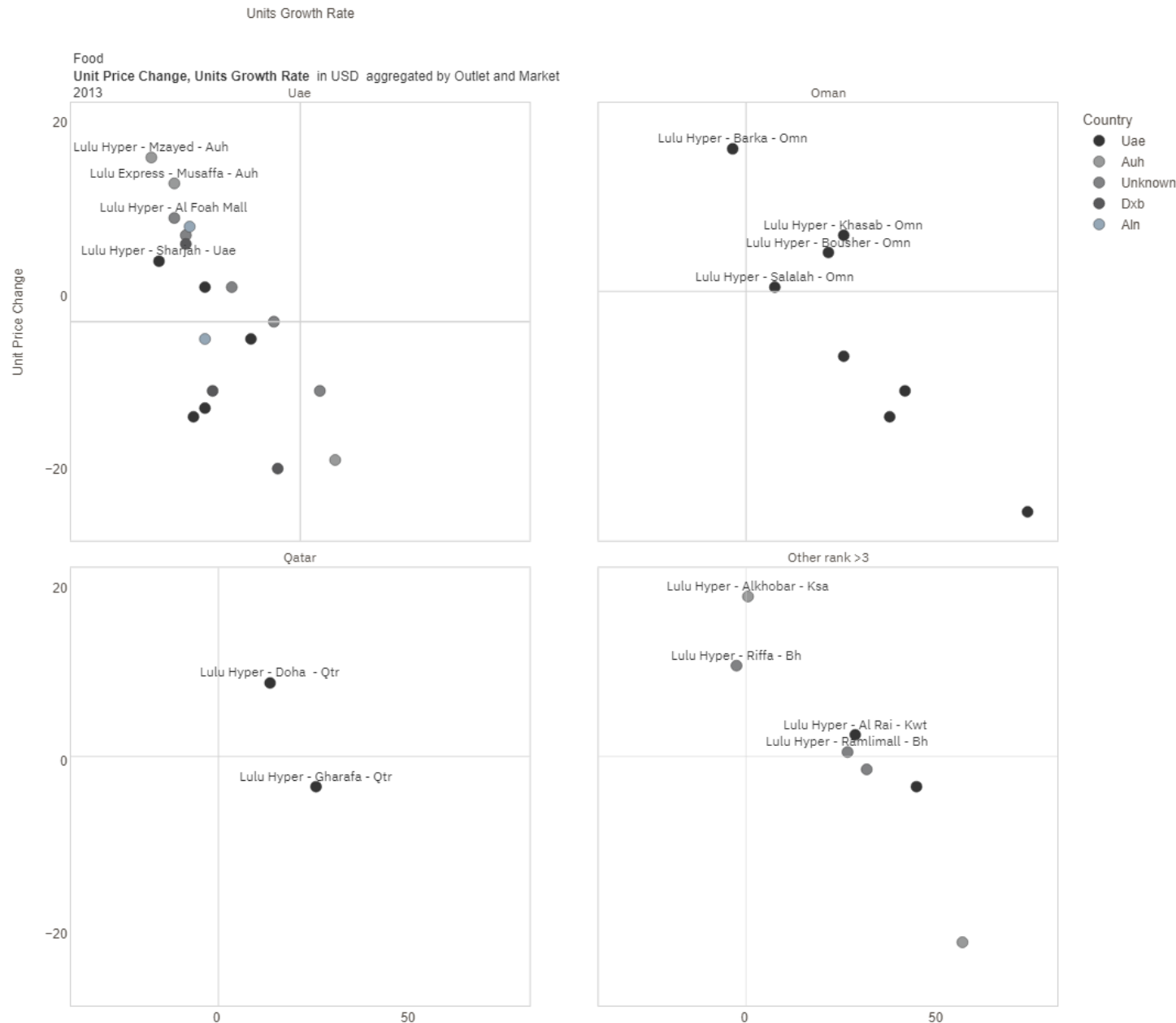
Omn is the top market for Food ABC in sales, units, and number of outlets. However, some regions like Unknown have a higher percentage of outlets compared to their sales contribution. The 'Other Rank >7' category, representing smaller regions, also holds a significant portion of sales and units, showing the collective importance of these markets.



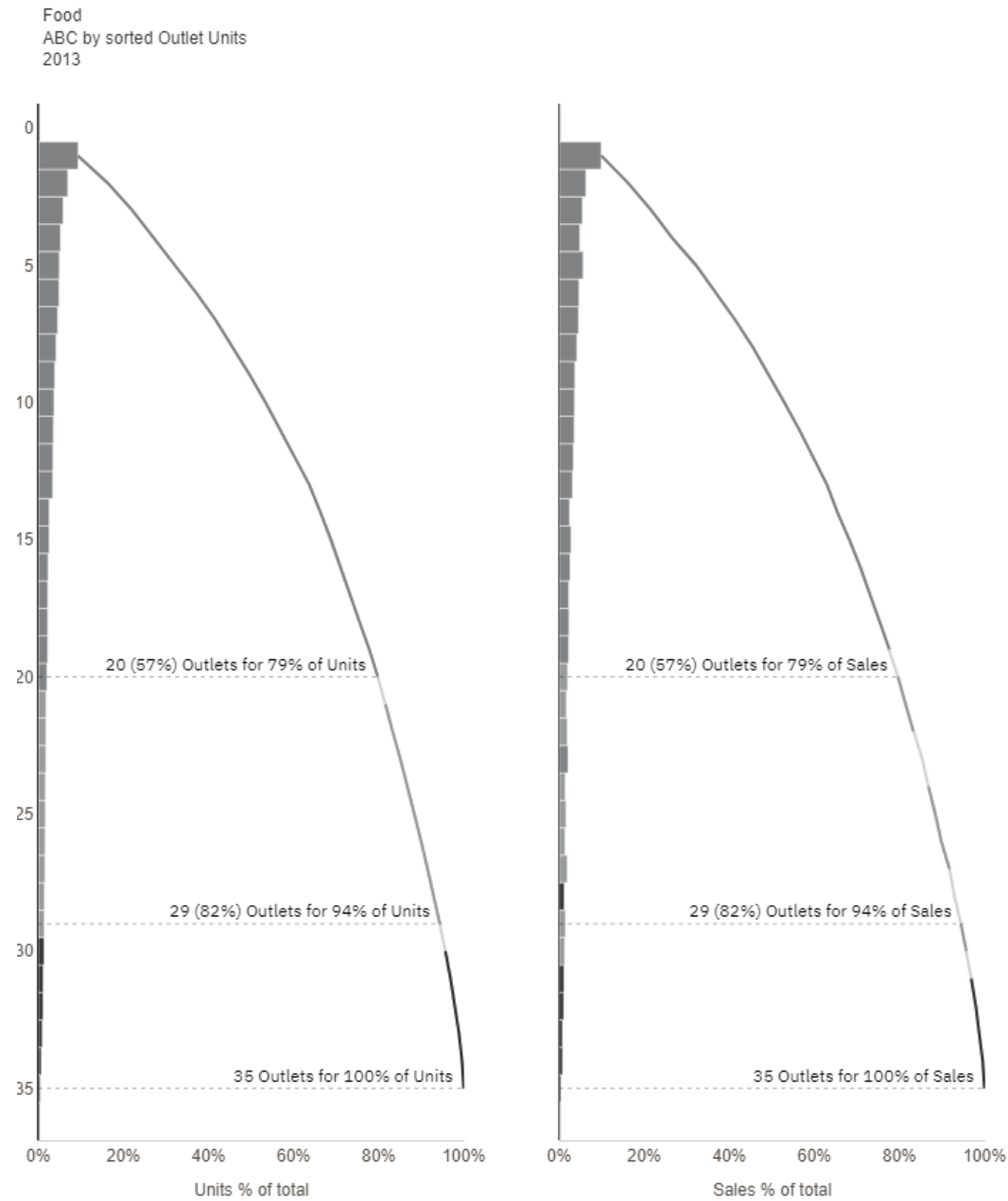
The scatter chart shows each outlet performed differently, likely due to local market conditions, competition, and business strategies. Price changes varied widely, but most outlets saw positive unit growth, suggesting healthy markets or effective sales tactics.



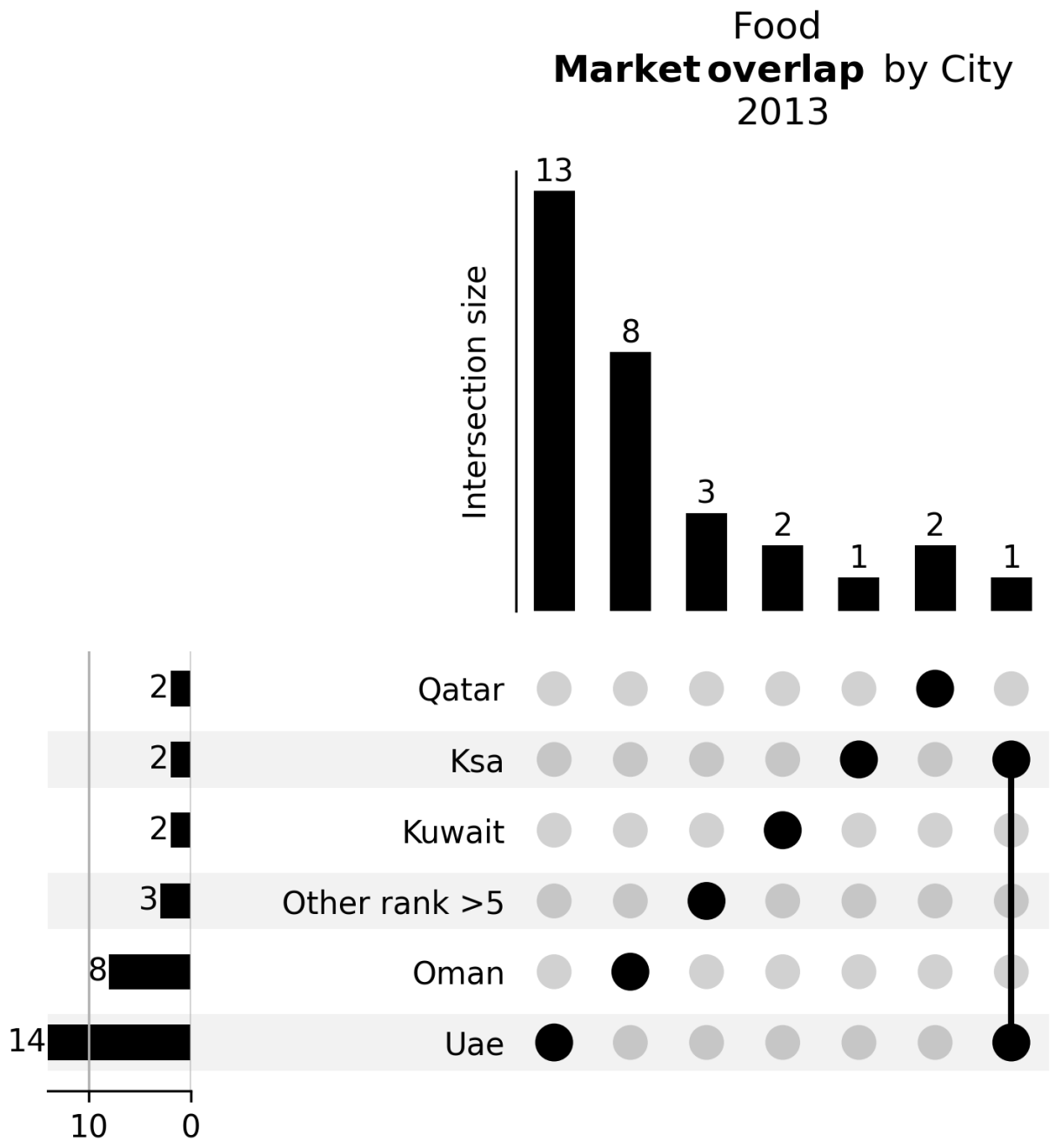
The small multiples scatter plot analysis highlights geo-market variations. UAE and Oman markets show stable pricing with minimal unit growth, suggesting mature or saturated markets. Qatar outlets display a range of price adjustments, possibly indicating different strategic responses. Clusters near the origin in most plots suggest potential opportunities for increasing profitability through pricing or sales volume adjustments.



The top 20 outlets (Class A) contribute 79% of total units and sales. The consistent distribution suggests standardized pricing or similar revenue strategies across most outlets. The weak concentration of units and sales indicates a fairly diffuse spread, with relevant contributions from outlets beyond Class A.



Qatar emerges as a dominant single market for Nestlé in the Middle East. The minimal overlap across all regions suggests distinct market segmentation or tailored strategies by city. Regions outside the top 5 collectively represent a substantial opportunity, highlighting the potential of smaller markets that may be under recognized



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The business experienced strong growth from 2012 to 2013, with units sold increasing by 14.1% and sales revenue also growing (p.35). This growth was driven by strong performance in specific product categories, such as Chocolates (25.2% increase) and niche 'Other rank >8' products (19% growth). Coffee, Milk Powder, and Noodles showed moderate growth, while Baby Nutrition declined by 1.9% (p.36).

Geographically, Kuwait, Qatar, and KSA markets demonstrated impressive growth, with CAGRs of 36%, 23.3%, and 21.6% respectively. Oman and Bahrain also experienced significant growth. However, the UAE, despite being the largest market, saw a 2.2% sales decline, contrasting the growth in other markets (p.37).

The outlets recorded a substantial sales increase of \$924.0k from 2012 to 2013, representing a strong 13% CAGR. This suggests positive performance, effective strategies, expansion, or improved market conditions (p.38).

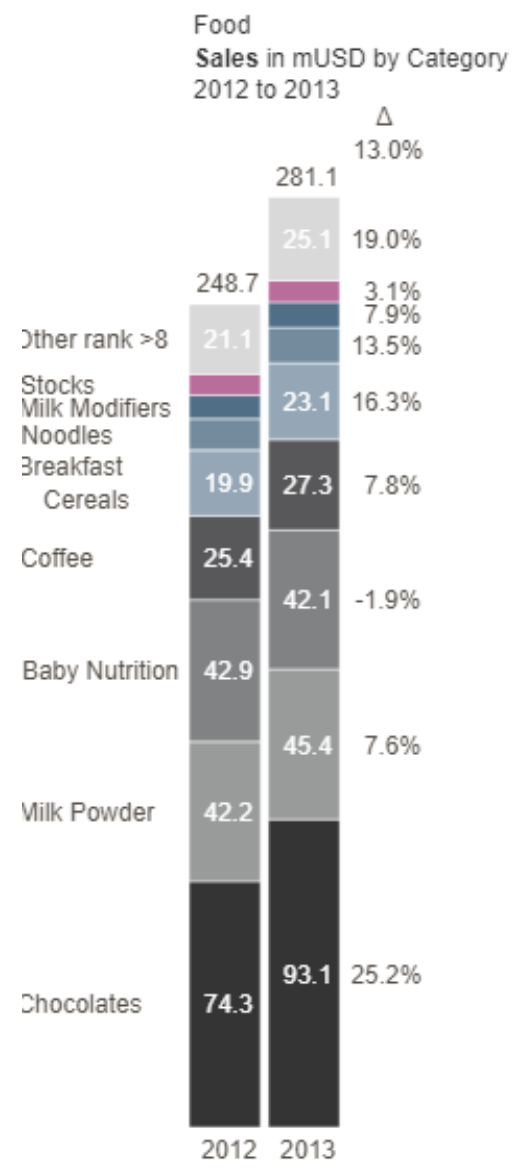
Among the Middle Eastern markets, Kuwait had the highest like-for-like outlet sales growth at 36%, followed by Qatar at 23.3% and KSA at 21.6%. Although the UAE experienced a -2.2% growth rate, it still maintained the highest overall sales, indicating a larger market size. The region's overall CAGR of 13% points to positive trends and investment potential, particularly in high-growth markets (p.39).

To ensure sustained regional growth, it is crucial to address the sales decline in the UAE market while capitalizing on the strong performance in other markets and product categories. Further analysis of the factors contributing to the UAE's decline and the success of high-growth markets could provide valuable insights for optimizing future strategies and results (p.37, p.38, p.39).

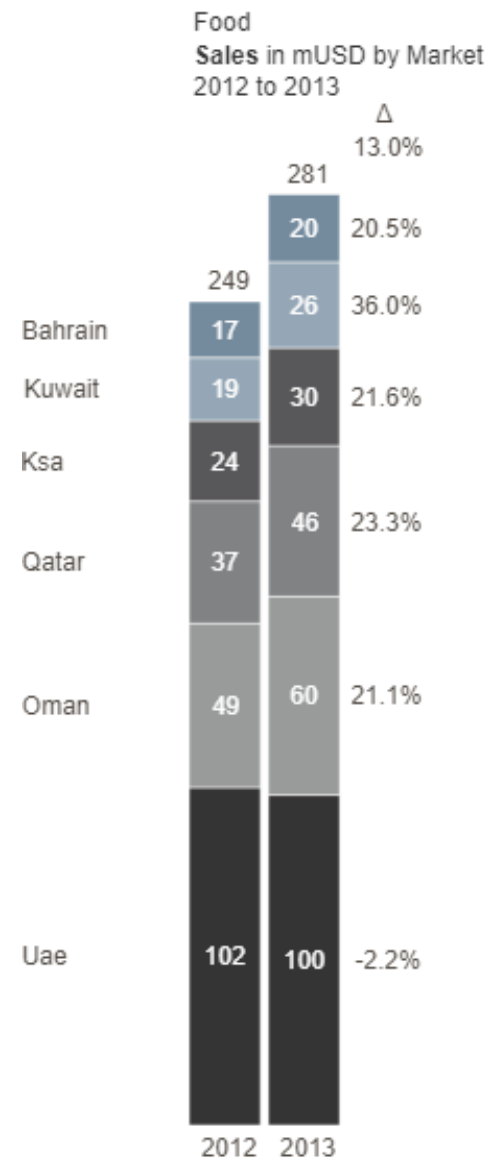
The business saw strong growth from 2012 to 2013. Units sold rose 14.1% and sales revenue grew too. Higher sales volumes are translating into higher revenue, suggesting a positive market response and effective sales strategies.



Chocolates saw a 25.2% increase, while niche 'Other rank >8' products grew by 19%. Coffee, Milk Powder, and Noodles showed moderate growth. However, Baby Nutrition declined by 1.9%.



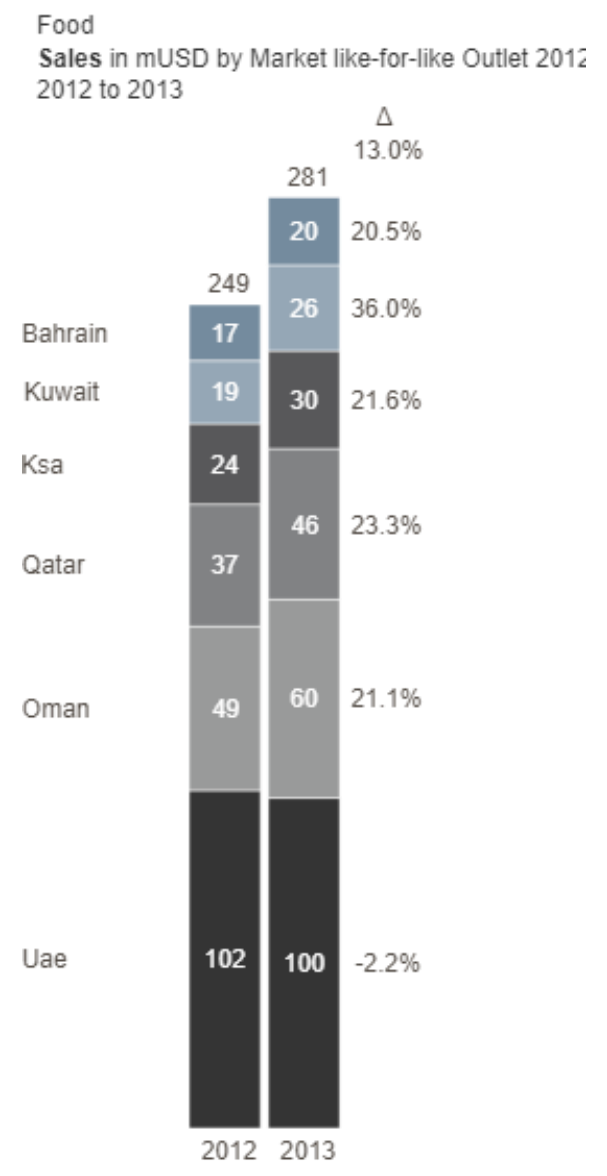
Kuwait, Qatar, and KSA markets saw strong growth with 36%, 23.3%, and 21.6% CAGRs respectively. Oman and Bahrain also grew significantly. However, UAE, the largest market, saw a 2.2% sales decline, contrasting other markets' growth. This decline needs addressing to ensure sustained regional growth.



The outlets saw sales increase by \$924.0k from 2012 to 2013, a strong 13% CAGR. This suggests positive performance, effective strategies, expansion, or improved conditions. Further analysis could enhance future results.



Kuwait had the highest like-for-like outlet sales growth in the Middle East at 36%, followed by Qatar at 23.3% and KSA at 21.6%. Despite a -2.2% growth rate, UAE still had the highest overall sales, suggesting a larger market. The region's CAGR was a healthy 13%, indicating positive trends and investment potential, especially in high-growth markets, while addressing UAE challenges.



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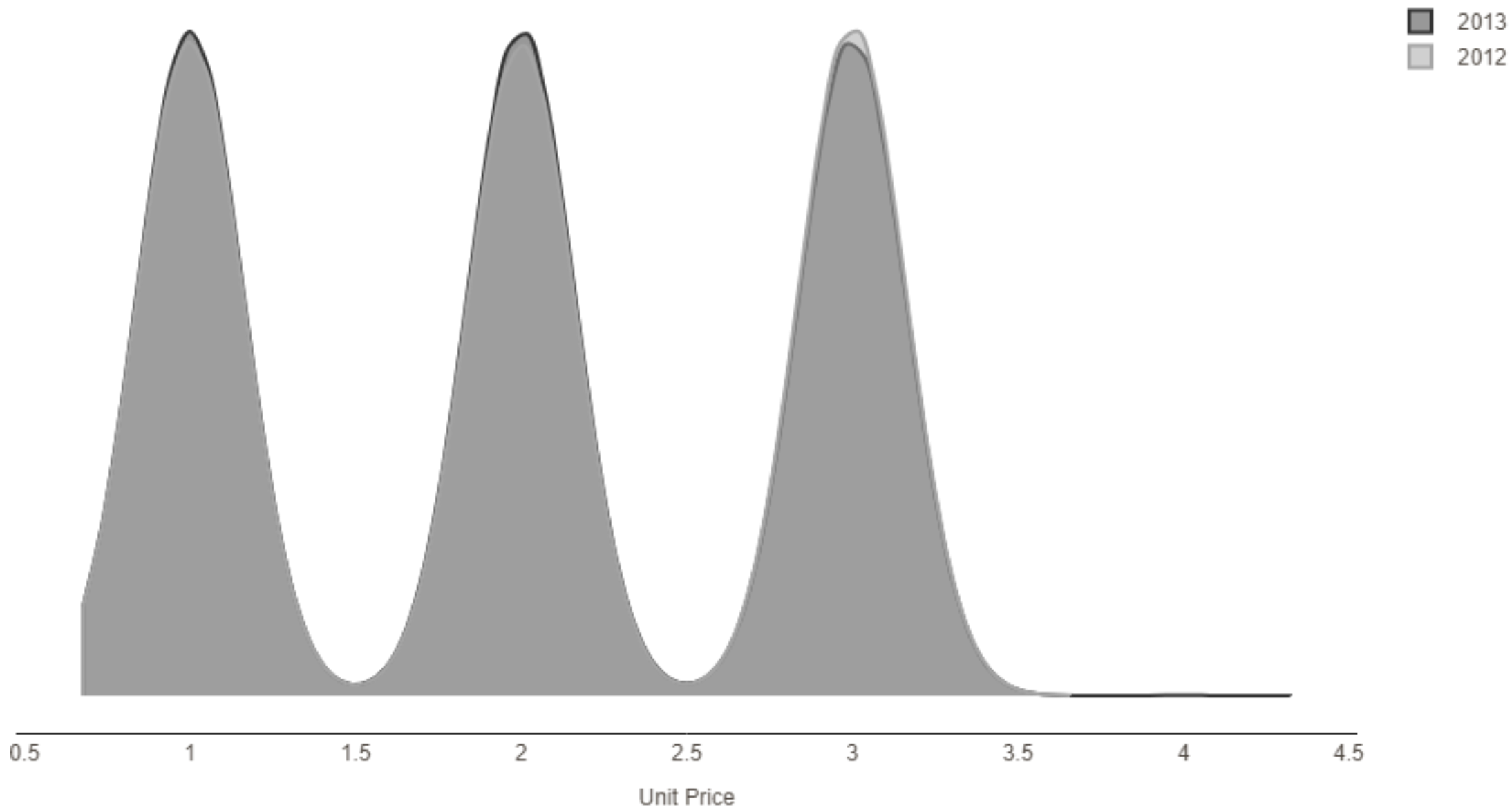
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Food
Unit Price in USD, by observation
2012 vs 2013



Food
Unit Price in USD, by observation by Market
2012 vs 2013

