



Presentatie Circana

Irene Hendriksen

- Wie zijn de winnaars in het bierschap in de toekomst?



IRI and NPD have
come together
to form



We transform complexity into clarity with the
most complete view of the consumer, inspiring
actions that unlock business growth.





Film

About us

Experience

Transition
and
credentials

Investment

Contact





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About us

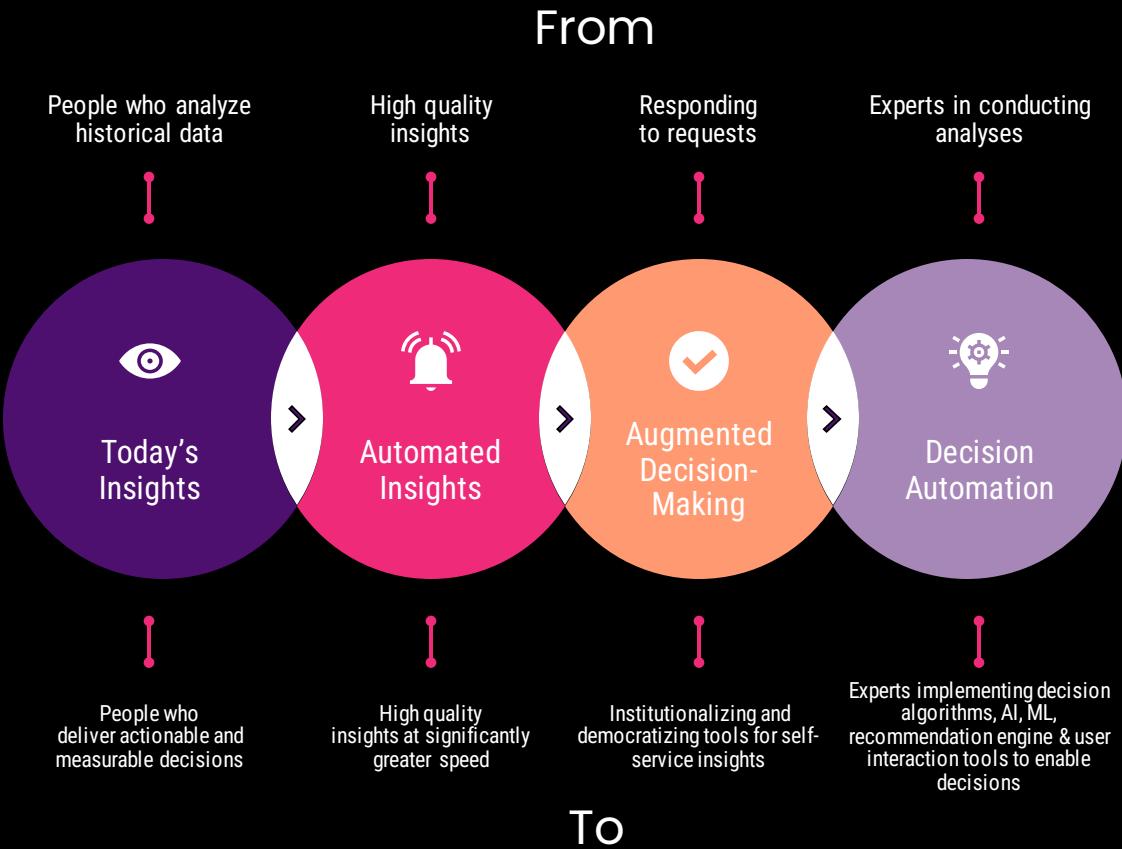
Circana Netherlands

The future of market research
is focused on automating and
democratising insights and
decision-making platforms.



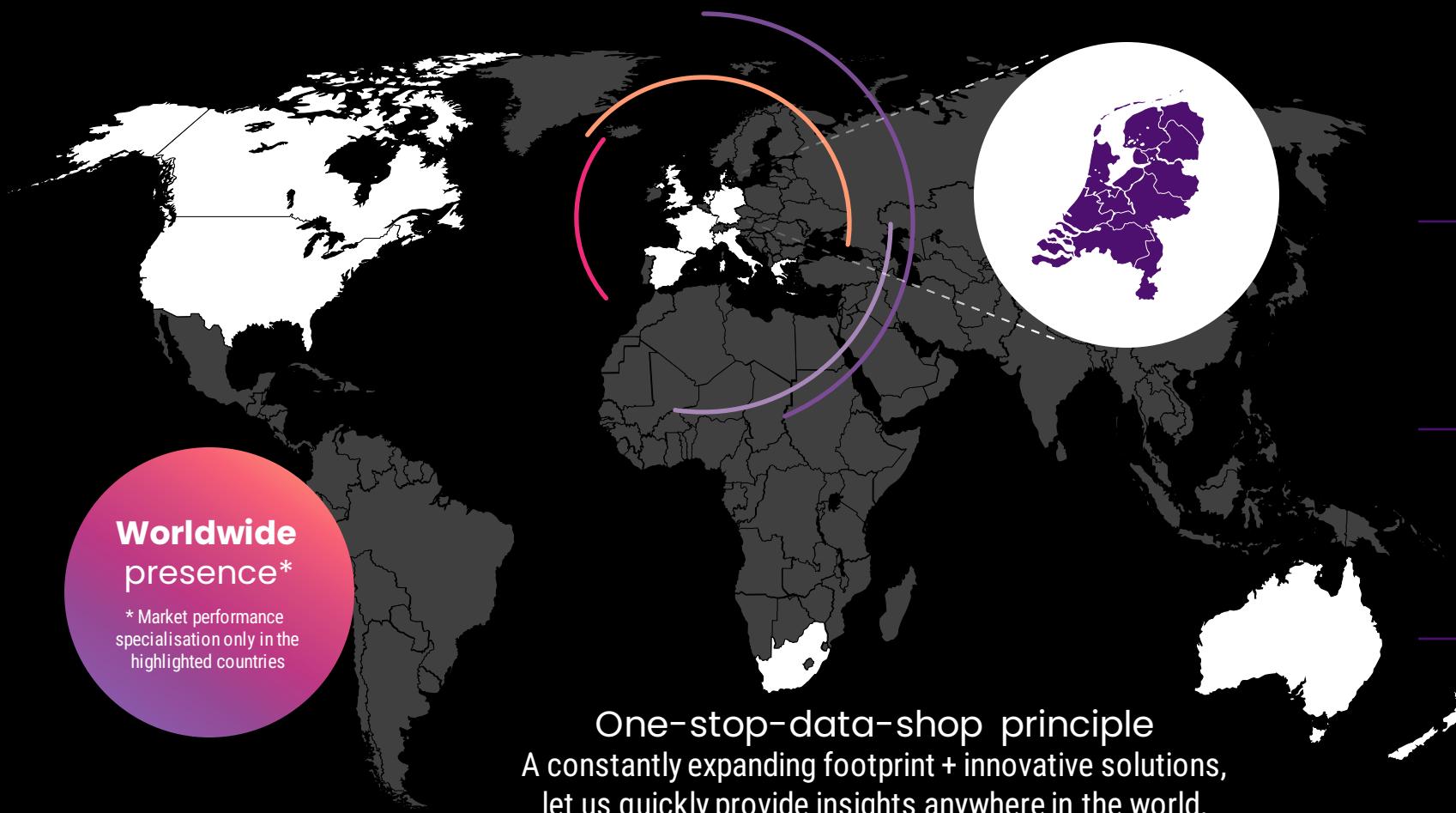


About us





Today's Circana



Market performance & strategy

- ▶ Market Measurement
- Audit
- Strategy
- Innovation

Consumer & shopper intelligence

- Insights
- Segmentation
- Innovation
- Shopper Targeting & Activation

Analytics & in-market execution

- Price & Promo Optimization
- Assortment Management
- Gateways
- Supply Chain

Media

- Planning
- Media Targeting & Activation
- Measurement
- Optimization



Film

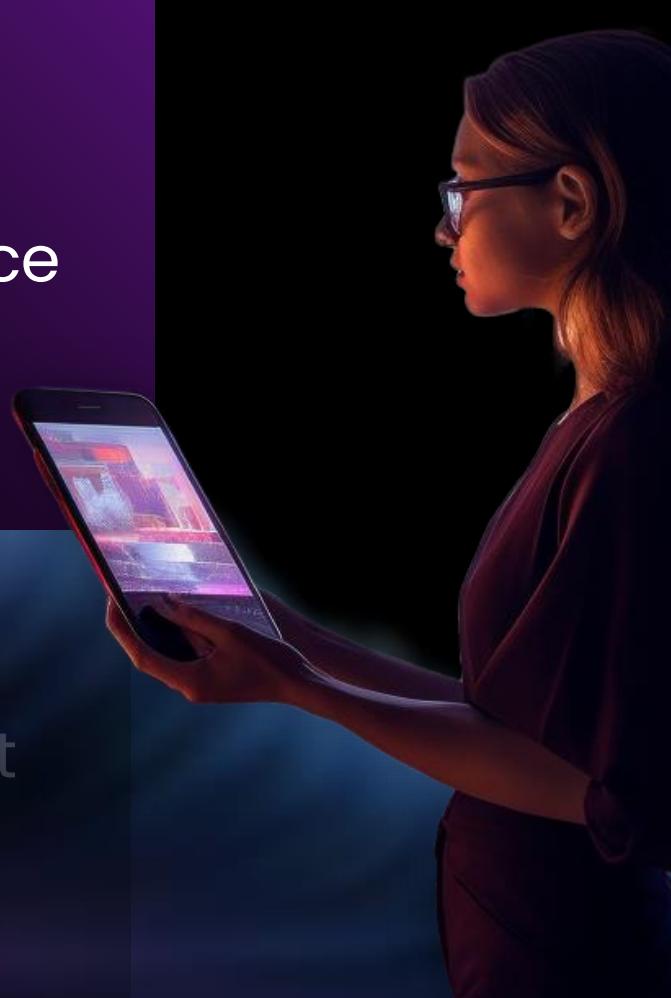
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The core of Circana

We distinguish ourselves by enriching raw retail measurement data to an ultimate level – in order to offer maximum flexibility

January

S	M	T	W	T	F	S
31				1	2	
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

February

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
	28					

March

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
	28	29	30	31		

April

S	M	T	W	T	F	S
			1	2	3	
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

May

S	M	T	W	T	F	S
30	31					1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

June

S	M	T	W	T	F	S
	1	2	3	4	5	6
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

July

S	M	T	W	T	F	S
	1	2	3	4	5	6
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

August

S	M	T	W	T	F	S
	1	2	3	4	5	6
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

September

S	M	T	W	T	F	S
		2	3	4	5	6
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

October

S	M	T	W	T	F	S
31				1	2	
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

November

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

December

S	M	T	W	T	F	S
	1	2	3	4	5	6
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

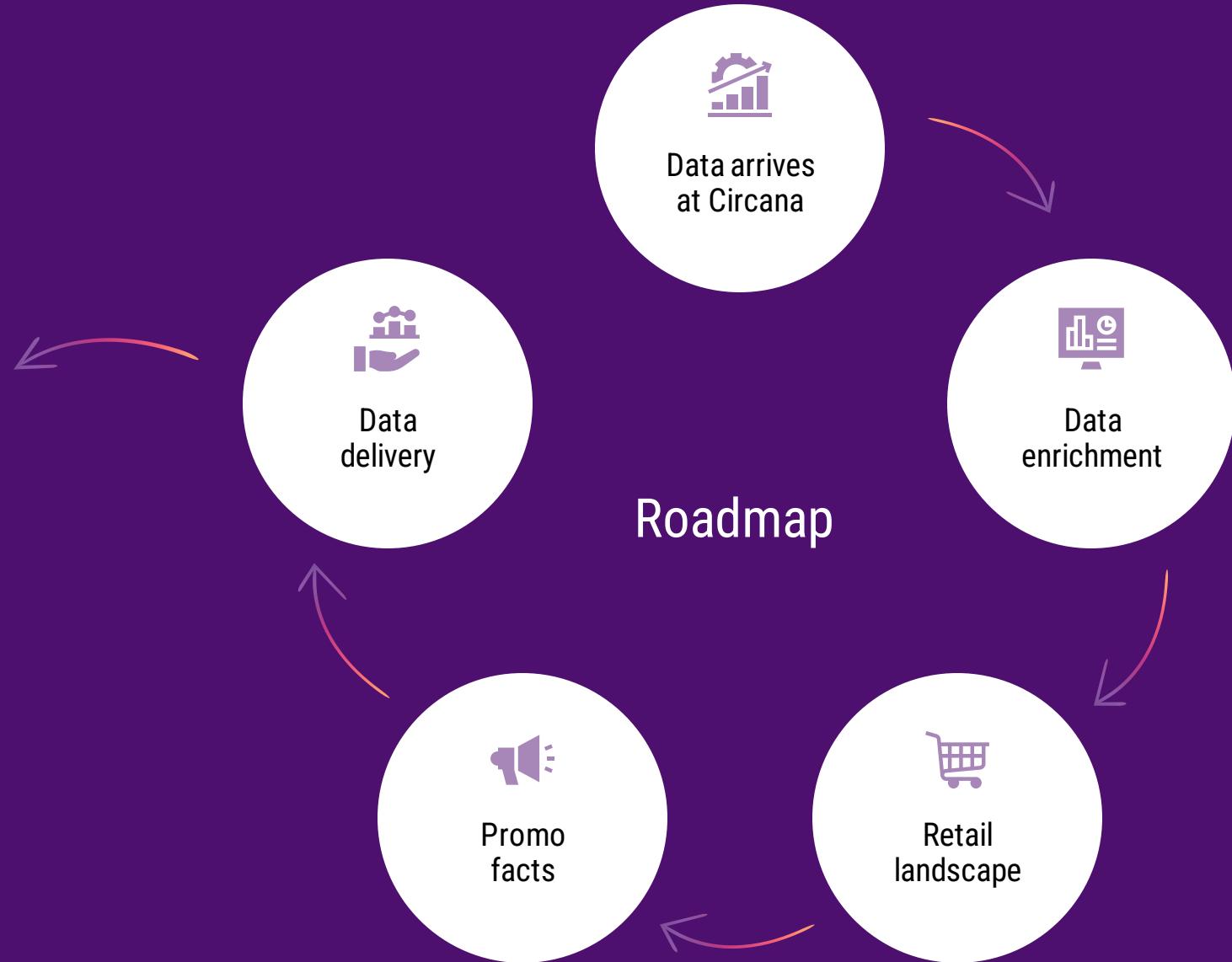


January

S	M	T	W	T	F	S
31				1	2	
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

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Roadmap

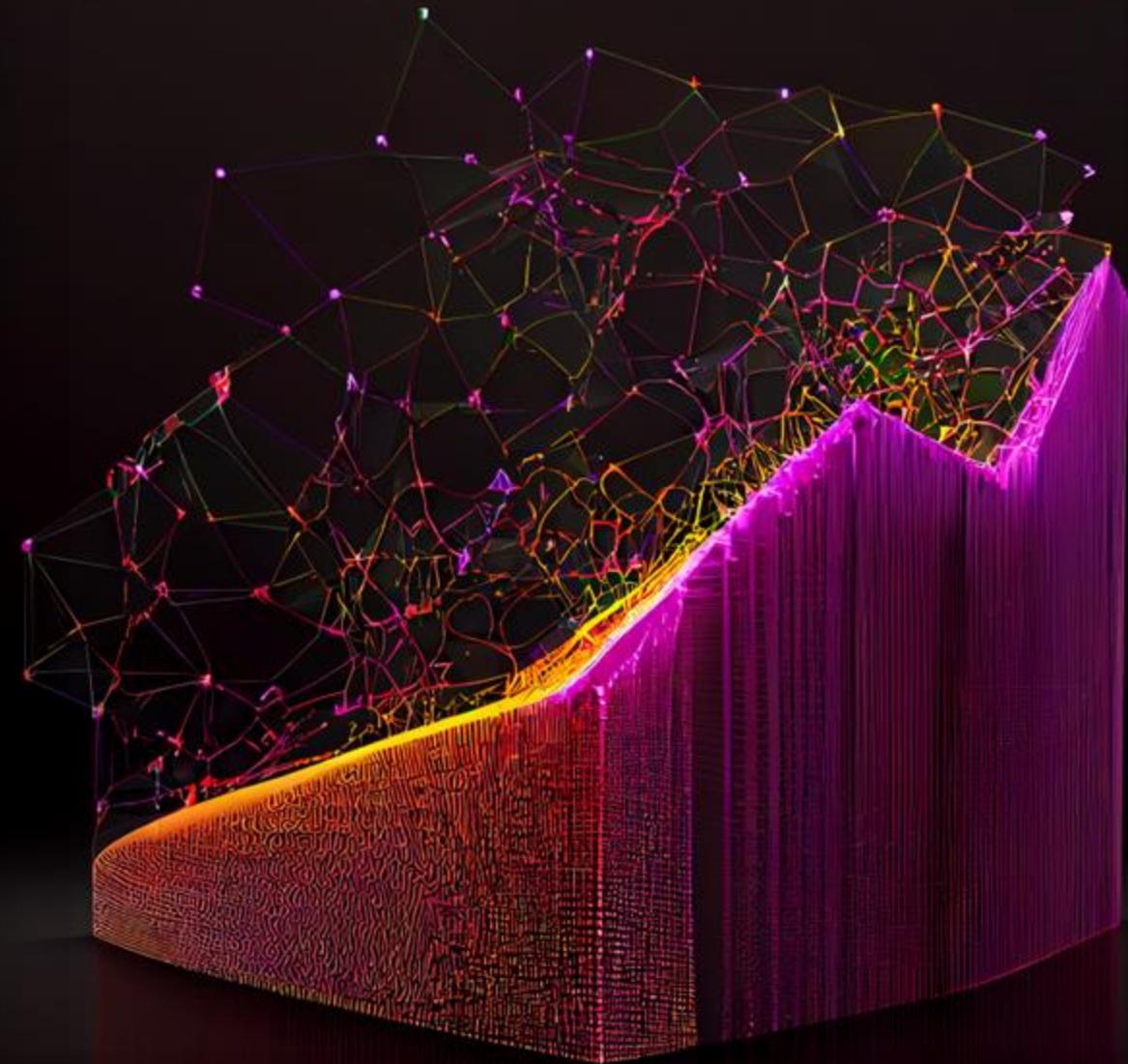




Latest techniques



A combination of 'Machine-Learning', 'Best-Match-Coding' and 'Onshore-Expert-Review' guarantee consistency and quality



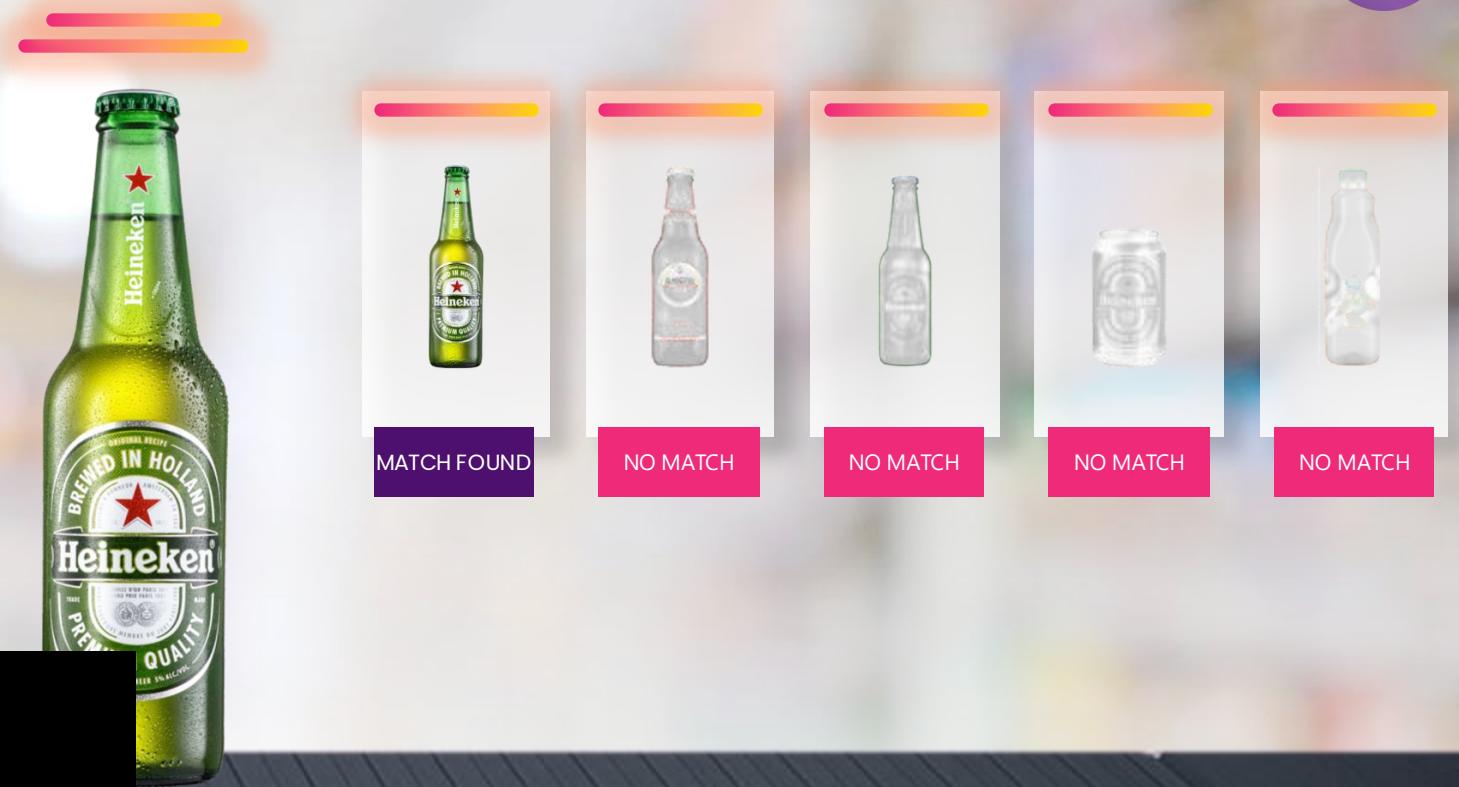
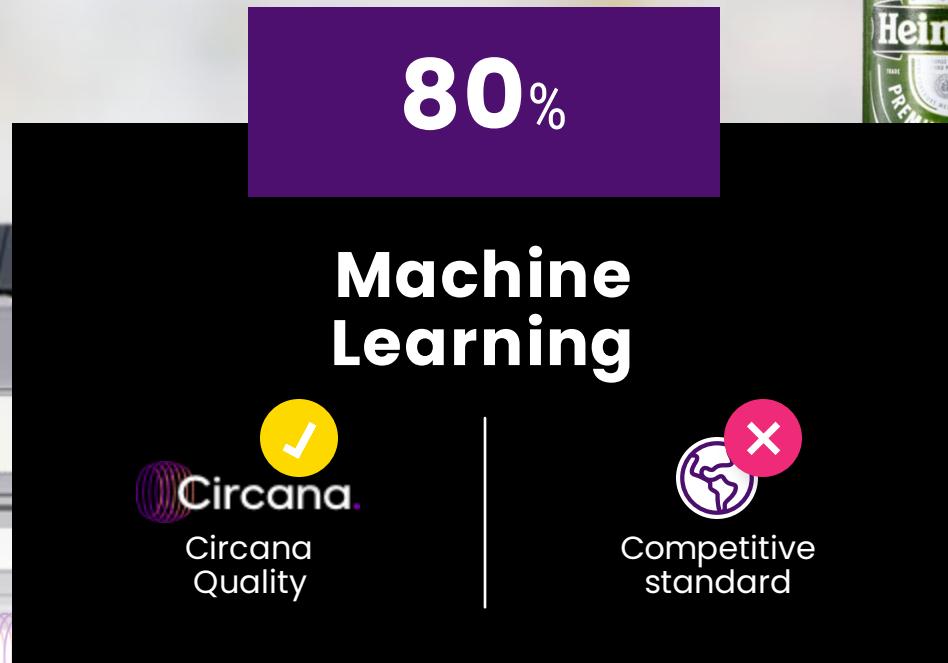


We make use
of the latest
techniques





We make use of the latest techniques





We make use of the latest techniques



Heineken

MATCH
FOUND

Heiniken

NO MATCH

heineken_bier

NO MATCH

Heinekenm;

NO MATCH

90%

Best Match Coding



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Quality

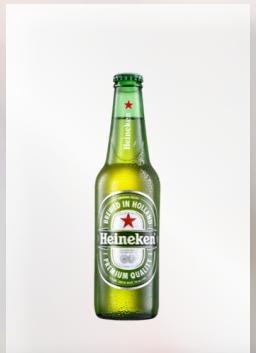


Competitive
standard

 Circana.



We make use of the latest techniques



Heineken

Heineken	
Alcohol percentage	5,4%
Calories:	23,2
Segment:	Beer
Promo active:	No

100%

Onshore
Expert Review



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Circana
Quality



Competitive
standard



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We make use
of the latest
techniques

Heineken

Heineken	
Alcohol percentage	5,4%
Calories:	23,2
Segment:	Beer
Promo active:	No

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99,5%
COVERAGE
WITH CIRCANA

100%
AMBITION CIRCANA



ONLY 97,5%
COVERAGE WITH
COMPETITOR

Beer coverage

Customer – beer category



Royal Swinkels
family brewers



Other customers (snapshot)

KraftHeinz



kao



HG



BACARD

dayes[®]
EVERYDAY ESSENTIALS

PERFETTI



united
soft drinks

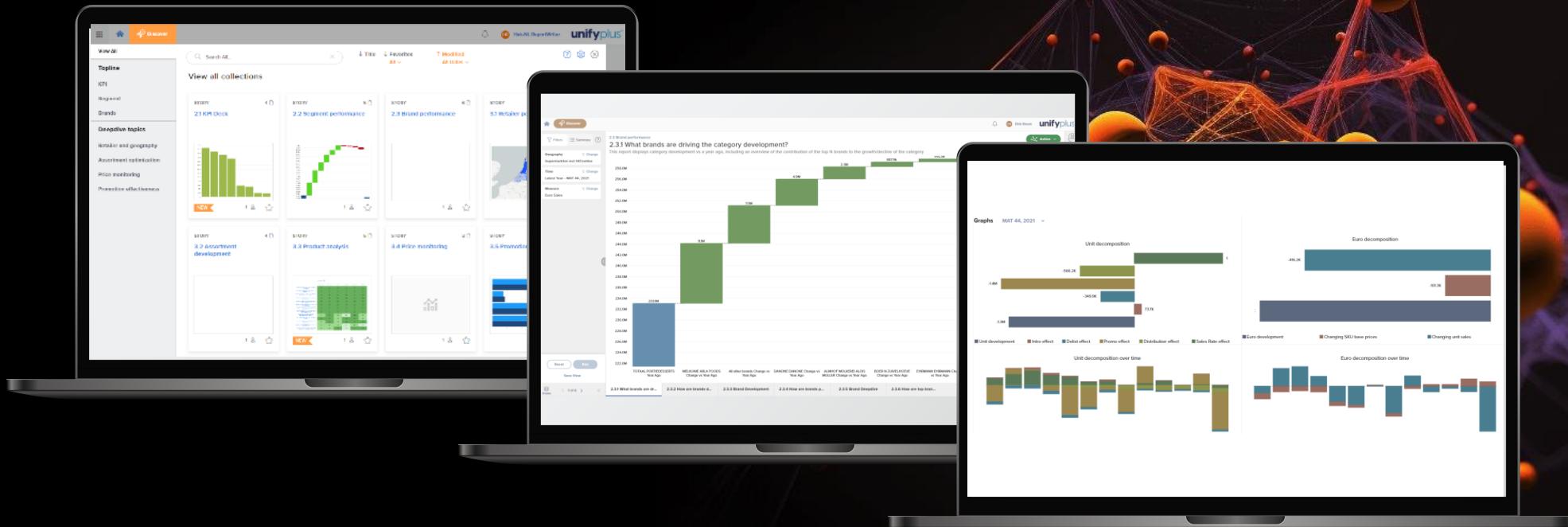
LambWeston[®]
SEEING POSSIBILITIES IN POTATOES

MAXXIUM
NEDERLAND



The Unify Insights stories

Set of reports for all your business questions!





EAN X has a distribution chance “based on rotation of +5% at Albert Heijn”

Competitor brand Y has increased promo pressure, your volumes will decrease



Opportunity Alerts:
Automates the insight discovery process and proactively surfaces alerts based on user defined criteria

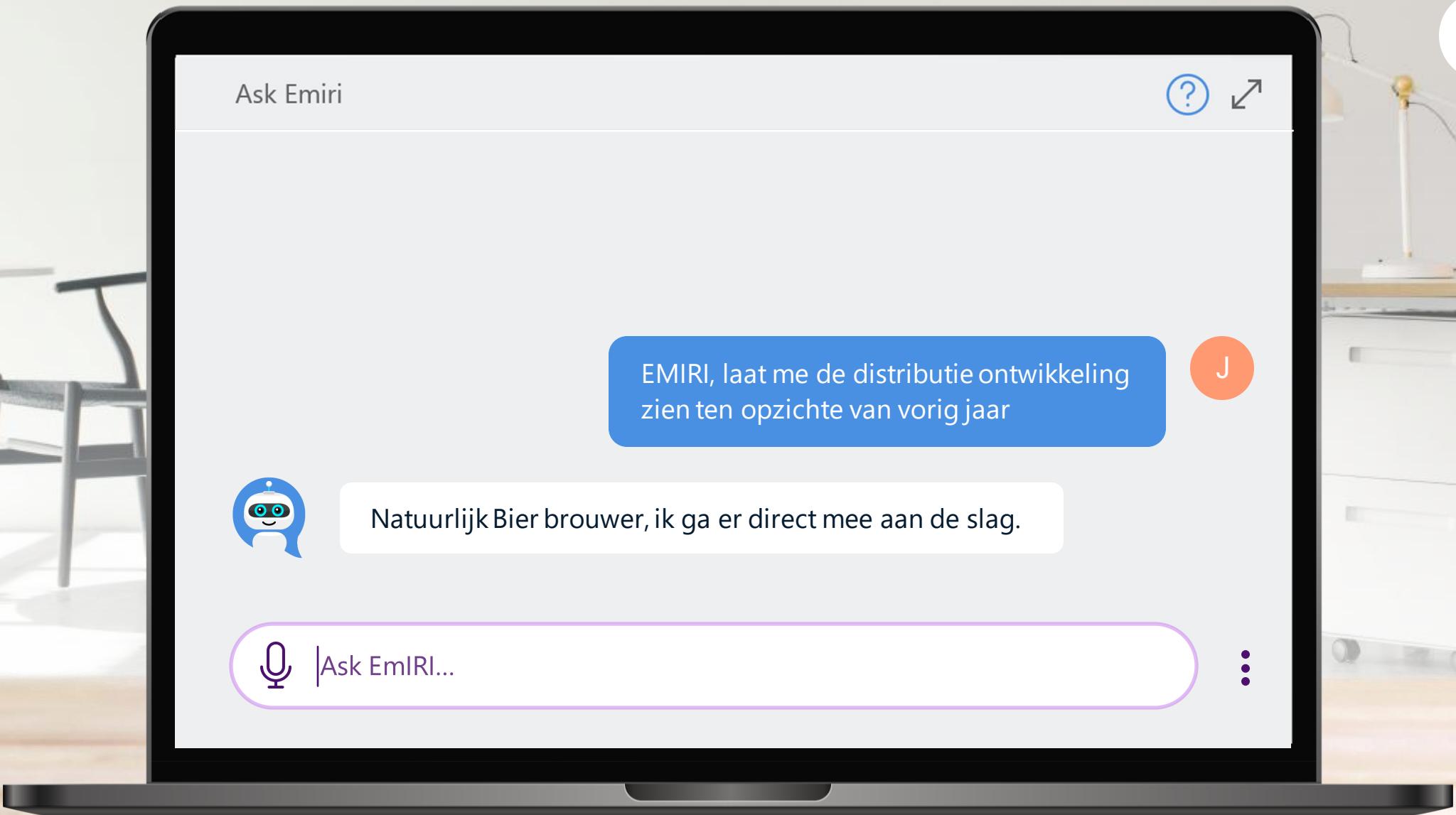
Opportunity Predictors:
Applies additional algorithms and analytic models to quantify the value of an opportunity and provide prioritized recommendations.

Adapt your price of EAN X to keep your volumes

These 25 EAN's has a higher index than the average in similar segment, please check this

Marketshare of Brand X is behind in region 1,2,3. Focus on these regions with your sales colleagues.







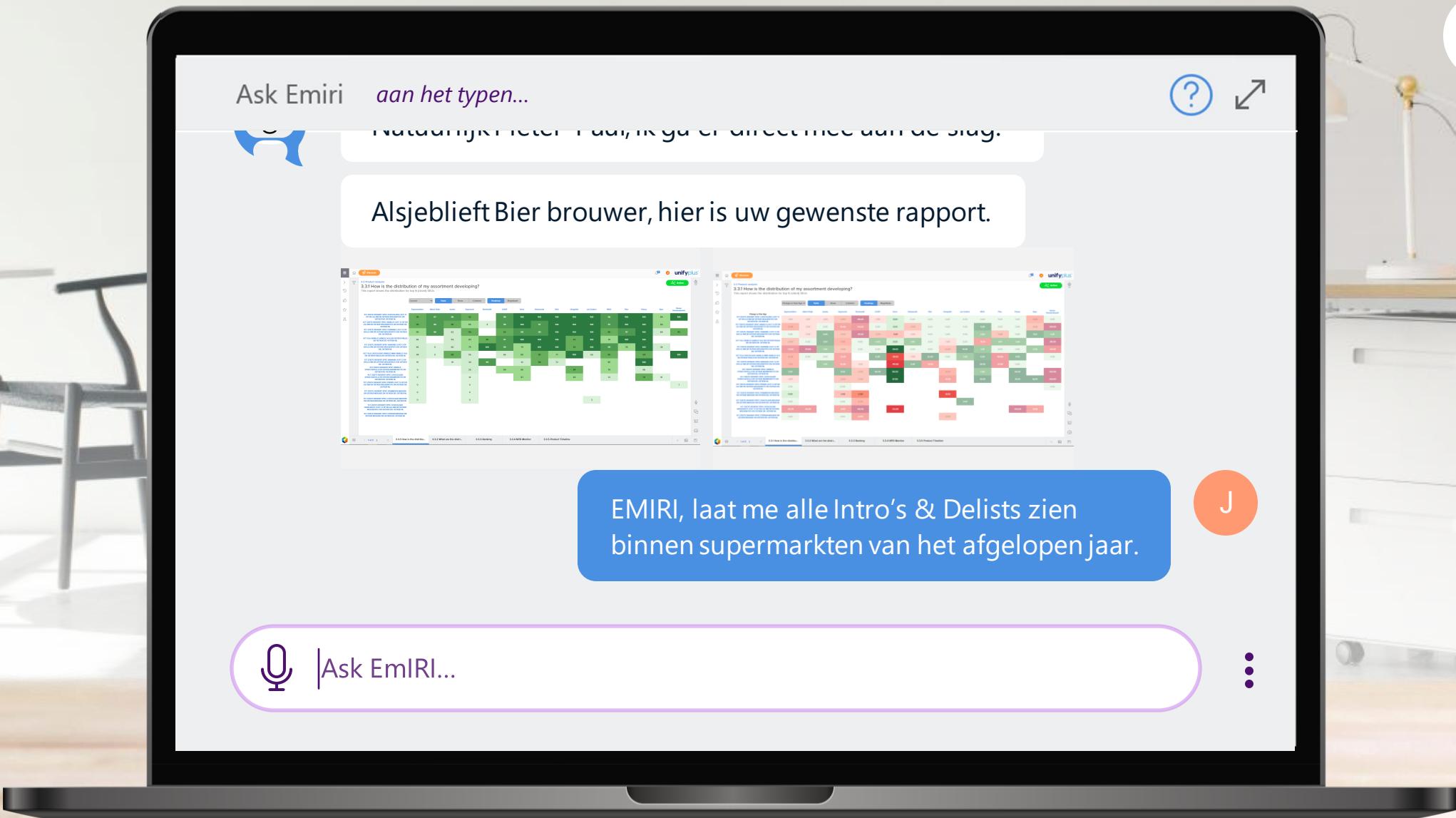
Ask Emiri

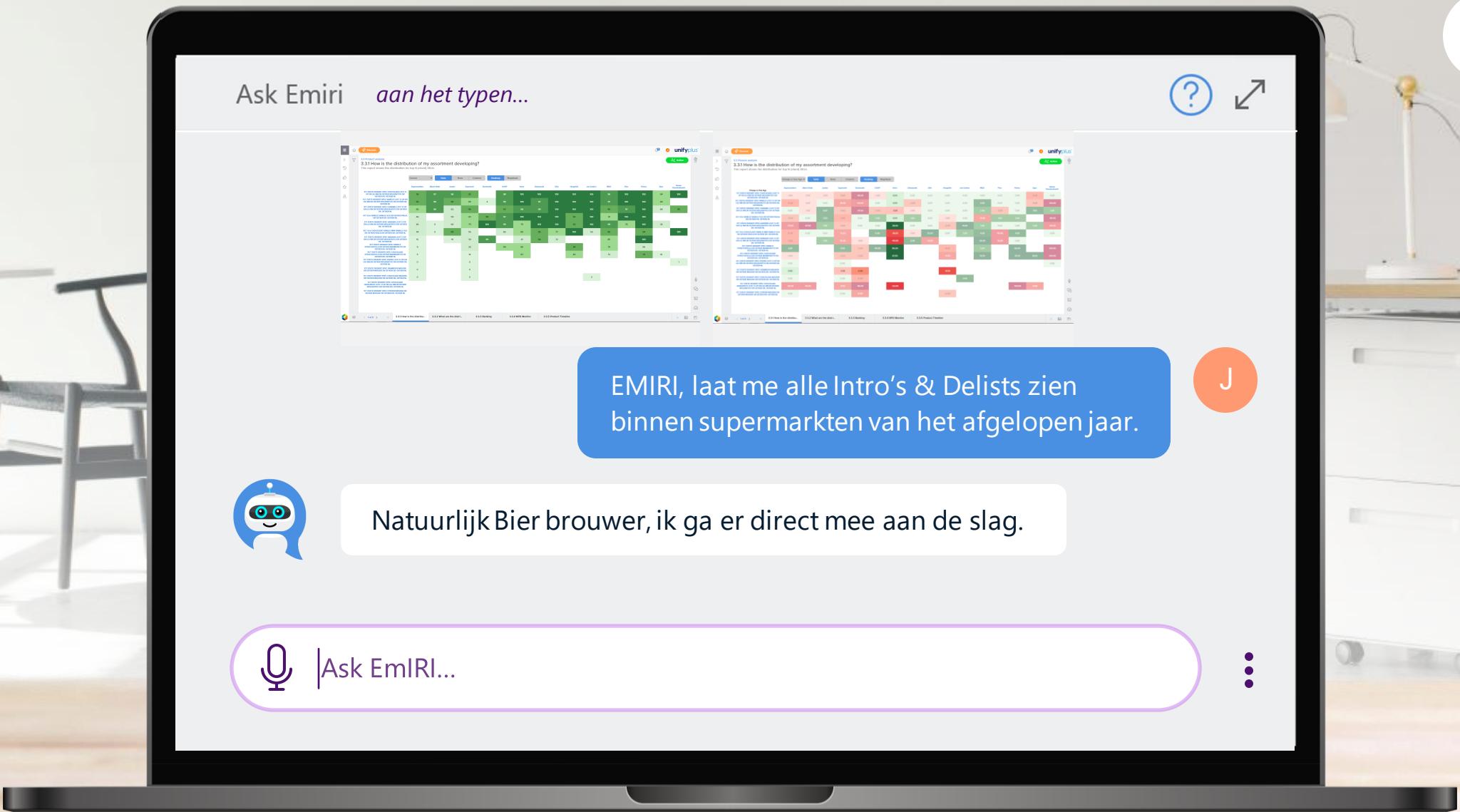
EMIRI, laat me de cijfers serie ontwikkeling zien ten opzichte van vorig jaar

Natuurlijk Bier brouwer, ik ga er direct mee aan de slag.

Alsjeblieft Bier brouwer, hier is uw gewenste rapport.

EMIRI, laat me alle Intro's & Delists zien binnen supermarkten van het afgelopen jaar.





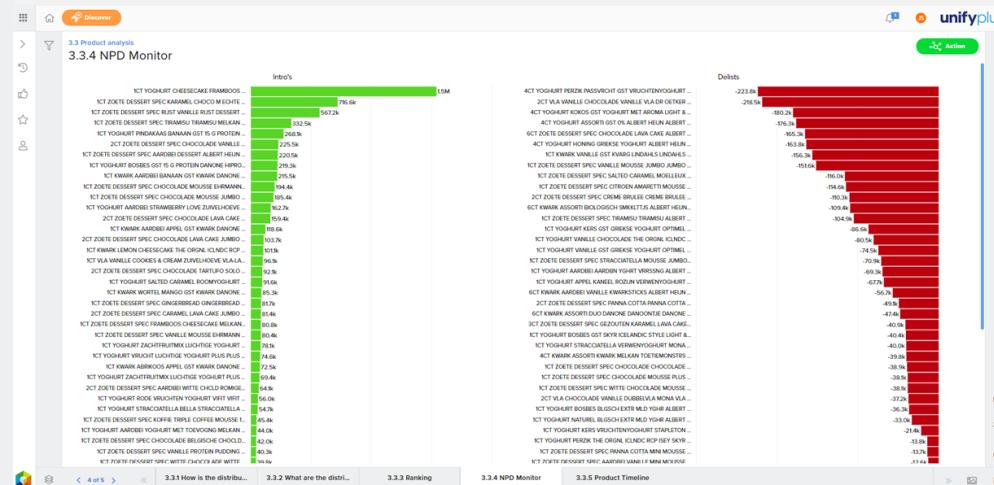


Ask Emiri

aan het typen...



Alsjeblieft Bier brouwer, hier is uw gewenste rapport.



Emiri houdt me de KPI's zien van de beste introductie.



Ask Emiri aan het typen...

3.3 Product analysis

3.3.4 NPD Monitor

Intro's

Product	Value
ICT ZOETE DESSERT SPEC CHEESECAKE FRUITSOUD...	15M
ICT ZOETE DESSERT SPEC CHOCOLADE CROISSANT...	790.6K
ICT ZWART KAWAKI YOGHURT VLAIS CHOCOLADE DRIED...	597.2K
ICT ZOETE DESSERT SPEC BLAUW VANILLE & RIEST DESERT...	332.5K
ICT YOGHURT PINDAKAAT BANANA IST G PROTEIN...	245.8K
2CT ZOETE DESSERT SPEC CHOCOLADE LAVA CAKE ALBERT...	225.5K
ICT ZWART KAWAKI YOGHURT VLAIS CHOCOLADE DRIED...	220.5K
ICT YOGHURT BOSSES IST G PROTEIN VANILLE HAMPO...	219.2K
ICT KWAKI KAWAKI BANANA IST KWAKI DANOENE...	215.5K
ICT ZOETE DESSERT SPEC CHOCOLADE MOUSSE EHONNA...	194.4K
ICT ZWART KAWAKI YOGHURT VLAIS CHOCOLADE DRIED...	187.8K
ICT YOGHURT AMBODI STRAWBERRY LOVE ZUIGEN HOVS...	162.7K
2CT ZOETE DESSERT SPEC CHOCOLADE LAVA CAKE...	109.4K
ICT KWAKI AMERIKAS JAPES IST KWAKI DANOENE...	108.0K
2CT ZWART KAWAKI YOGHURT VLAIS CHOCOLADE DRIED...	102.3K
ICT KWAKI LEMON CHEESECAKE THE ORGANIC CLINT SC...	91.8K
ICT VLA VANILLE COOKIES & CREAM ZUVELDJOEVE VLA...	90.5K
2CT ZOETE DESSERT SPEC CHOCOLADE TARTUFO SOLO...	92.9K
ICT YOGHURT VLAIS CHOCOLADE DRIED...	87.6K
ICT KWAKI WORTEL MANGO IST KWAKI DANOENE...	85.3K
1CT ZOETE DESSERT SPEC GINGERSNABBLED GINGERBREAD...	81.7K
2CT ZOETE DESSERT SPEC CARMEL LAVA CAKE AMBO...	81.4K
ICT ZWART KAWAKI YOGHURT VLAIS CHOCOLADE DRIED...	80.8K
ICT ZOETE DESSERT SPEC VANILLE MOUSSE GUIMMANS...	79.8K
ICT YOGHURT ZACHTERLUTIGHEID LUCHTIGE YOGHURT...	79.4K
ICT YOGHURT WICH LUCHTIGE YOGHURT PLUS...	72.5K
ICT YOGHURT ZACHTERLUTIGHEID LUCHTIGE YOGHURT PLUS...	72.5K
2CT ZOETE DESSERT SPEC AMBODI WITTE CHOC ROMPI...	64.8K
ICT YOGHURT RODE VECHTLICHT YOGHURT VET VET...	55.0K
ICT YOGHURT ZACHTERLUTIGHEID LUCHTIGE YOGHURT...	53.7K
ICT ZOETE DESSERT SPEC KOKOS TRIPLE COCONUT MOUSSE L...	42.4K
ICT KWAKI AMERIKAS YOGHURT MET TOVOVING MELKJAN...	44.0K
ICT ZOETE DESSERT SPEC CHOCOLADE BELGISCHE CHOCOL...	42.0K
ICT ZOETE DESSERT SPEC VANILLE PROTEN PLUMPU...	40.3K
ICT ZWART KAWAKI YOGHURT VLAIS CHOCOLADE DRIED...	39.8K

Delsits

Product	Value
ACT YOGHURT FRESH PASSIONFRUIT GEGARNEERD YOGHURT...	-223.8K
2CT VLA VANILLE CHOCOLADE VLAIS CHOCOLADE DRIED...	-218.5K
ACT YOGHURT KOKOS IST YOGHURT MET AROMA LAMP...	-188.2K
ACT YOGHURT ASSORTI IST ALBERT HEIJN ALBERT...	-176.2K
GCT ZOETE DESSERT SPEC CHOCOLADE LAVA CAKE ALBERT...	-165.2K
ACT YOGHURT BOSSES YOGHURT VLAIS CHOCOLADE DRIED...	-163.0K
ICT YOGHURT VLAIS CHOCOLADE DRIED...	-155.6K
ACT YOGHURT FRESH PASSIONFRUIT GEGARNEERD YOGHURT...	-155.6K
NCT ZOETE DESSERT SPEC SALTED CARAMEL MOUSSE...	-150.0K
ICT ZOETE DESSERT SPEC CITROEN AMBETTE MOUSSE...	-134.6K
2CT VLA CHOCOLADE VLAIS CHOCOLADE DRIED...	-130.0K
GCT KWAKI ASSORTI BLOEDORCHOG SMOOTHIE ALBERT HEIJN...	-109.4K
ACT ZOETE DESSERT SPEC TRAMUO TRAMUO ALBERT...	-108.0K
ICT YOGHURT KERS YOGHURT OPTIMAAL...	-105.0K
ICT YOGHURT VLAIS CHOCOLADE DRIED...	-102.0K
ICT YOGHURT VANILLE IST GRIEKSE YOGHURT OPTIMAAL...	-95.6K
ICT ZOETE DESSERT SPEC STRACATELLA MOUSSE AMBO...	-93.0K
ICT KWAKI AMERIKAS YOGHURT VLAIS CHOCOLADE DRIED...	-91.0K
ICT YOGHURT VLAIS CHOCOLADE DRIED...	-89.0K
GCT KWAKI AMERIKAS VANILLE LEMONADES ALBERT HEIJN...	-87.7K
2CT ZOETE DESSERT SPEC PANNA COTTA PANNA COTTA...	-87.0K
GCT KWAKI ASSORTI DUO CHOCOLADE DANOONE DANOONE...	-85.0K
ICT YOGHURT VLAIS CHOCOLADE DRIED...	-84.0K
ICT YOGHURT BOSSES IST SKYR KELLOGS STYLE LIGHT A...	-82.0K
ICT YOGHURT VLAIS CHOCOLADE DRIED...	-80.0K
GCT KWAKI STRACATELLA VERNAMEN YOGHURT MONA...	-79.0K
ICT YOGHURT VLAIS CHOCOLADE DRIED...	-78.0K
ICT ZOETE DESSERT SPEC CHOCOLADE MOUSSE PLUS...	-75.0K
ICT ZOETE DESSERT SPEC CHOCOLADE VLAIS...	-73.0K
ICT ZOETE DESSERT SPEC WITTE CHOCOLADE MOUSSE...	-70.0K
2CT VLA CHOCOLADE VANILLE CHOCOLADE VLA MONA VLA...	-67.0K
ICT YOGHURT VLAIS CHOCOLADE DRIED...	-65.0K
ICT YOGHURT NATURALS BLOEDORCHOG MELK YOGHURT...	-63.0K
ICT YOGHURT KERS YOGHURTEN YOGHURT STAPLET...	-59.4K
ICT YOGHURT FRESH THE ORGANIC KLEINZOPP ROP ICE SKYS...	-53.0K
ICT ZOETE DESSERT SPEC PANNA COTTA MINI MOUSSE...	-53.0K
ICT ZWART KAWAKI YOGHURT VLAIS CHOCOLADE DRIED...	-51.4K

EMIRI, laat me de KPI's zien van de beste introductie.

?

↗

J

🎙

Ask EmIRI...

⋮

Circana.



Ask Emiri aan het typen...

ICT ZOUTE DESSERT SPEC CHOCOLADE MUSSIE KIWIWA - 194.46
ICT YOGHURT ASSORTI KIWIWA VRIJHEID DREAM - 193.46
2CT ZOUTE DESSERT SPEC CHOCOLADE LAVA CAKE - 192.76
ICT KWARK AMBROED APPLES GST KWARK DANONE - 190.46
ICT ZOUTE DESSERT SPEC CHOCOLADE LAVA CAKE JAMBO - 190.33
ICT KWARK ASSORTI KIWIWA VRIJHEID DREAM - 190.33
ICT KWARK ASSORTI KIWIWA VRIJHEID DREAM - 190.33
ICT VLA VANILLE COOKIES & CREAM ZUWE KEKSE VLA LA - 190.36
2CT ZOUTE DESSERT SPEC CHOCOLADE TARTUFO SOLO - 192.36
ICT YOGHURT SALTED CARAMEL ROOMYOGURT - 194.36
ICT YOGHURT ASSORTI KIWIWA VRIJHEID DREAM - 194.36
2CT ZOUTE DESSERT SPEC CHOCOLADE DUNGEONHEAD - 197.36
2CT ZOUTE DESSERT SPEC CARMEL LAVA CAKE JAMBO - 194.16
ICT ZOUTE DESSERT SPEC FRAMBOOS CHEESECAKE MELKWA - 193.96
ICT KWARK ASSORTI KIWIWA VRIJHEID DREAM - 193.96
ICT YOGHURT ZACHTERLUMPE LUCHTIGE YOGHURT - 193.96
ICT YOGHURT VLUCHT LUCHTIGE YOGHURT PLUS PLUS - 194.06
ICT KWARK ASSORTI APPLES GST KWARK DANONE - 194.06
ICT KWARK ASSORTI KIWIWA VRIJHEID DREAM - 194.06
2CT ZOUTE DESSERT SPEC AMBROSIA WITTE CHOCO ROMIGE - 194.06
ICT YOGHURT RODE VLUCHTEN YOGHURT VRTI VRTI - 194.06
ICT YOGHURT STRACCATELLA BELLA STRACCATELLA - 194.76
ICT YOGHURT ASSORTI KIWIWA VRIJHEID DREAM - 194.76
ICT YOGHURT AMBROED YOGHURT MET TOEVOEGING MELKWA - 194.86
ICT ZOUTE DESSERT SPEC CHOCOLADE BELGISCHE CHOCOL. - 192.06
ICT ZOUTE DESSERT SPEC VANILLE RICOTTA PUDDING - 191.96
ICT YOGHURT DRIFFY YOGHURT VRTI VRTI VANIL - 191.96

ICT ZOUTE DESSERT SPEC CHOCOLADE MUSSIE KIWIWA - 194.46
2CT ZOUTE DESSERT SPEC CHOCOLADE BRONZE CRÈME BRÛLÉE - 193.46
ICT YOGHURT ASSORTI KIWIWA VRIJHEID DREAM - 193.46
2CT ZOUTE DESSERT SPEC TRAMISU TRAMISU ALBERT - 193.46
ICT YOGHURT KERS GST DRIFFY YOGAART OPTIMEL - 193.46
ICT YOGHURT VANILLE CHOCOLADE THE ORION IONIC - 193.46
ICT YOGHURT ASSORTI KIWIWA VRIJHEID DREAM - 193.46
ICT ZOUTE DESSERT SPEC STRACCATELLA MOUSSE JAMBO - 193.46
ICT YOGHURT ASSORTI KIWIWA VRIJHEID DREAM - 193.46
ICT YOGHURT APPEL KANDE BOLLYWOOD YOGHURT - 193.46
ICT YOGHURT ASSORTI KIWIWA VRIJHEID DREAM - 193.46
2CT ZOUTE DESSERT SPEC PANNA COTTA RAVNA COSTA - 193.46
ICT KWARK ASSORTI DUO DANONE DANONIE DANONE - 193.46
3CT ZOUTE DESSERT SPEC GEZOETEN KARAMEL LAVA CAKE - 193.46
ICT YOGHURT ASSORTI KIWIWA VRIJHEID DREAM - 193.46
ICT YOGHURT STRACCATELLA VERNENYOGHURT MONA - 193.46
ICT KWARK ASSORTI KWAK MELKWA TOT MONSTERS - 193.46
3CT ZOUTE DESSERT SPEC CHOCOLADE CHOCOLADE - 193.46
ICT YOGHURT ASSORTI KIWIWA VRIJHEID DREAM - 193.46
2CT ZOUTE DESSERT SPEC WITTE CHOCOLADE MOUSSE - 193.46
2CT VLA CHOCOLADE VANILLE DUBBELVLA MONA VLA - 193.46
ICT YOGHURT BOSSES BLOED EKSTRA MUD YOGHURT ALBERT - 193.46
ICT YOGHURT ASSORTI KIWIWA VRIJHEID DREAM - 193.46
ICT YOGHURT KERS VLUCHTENYOGHURT STANLTON - 193.46
ICT YOGHURT FRESH THE ORION IONIC ROP SEY SKYS - 193.46
ICT ZOUTE DESSERT SPEC PANNA COTTA MINI MOUSSE - 193.46
ICT YOGHURT DRIFFY YOGHURT VRTI VRTI VANIL - 193.46

EMIRI, laat me de KPI's zien van de beste introductie.

Natuurlijk Bier brouwer, ik ga er direct mee aan de slag.

Ask EmIRI...



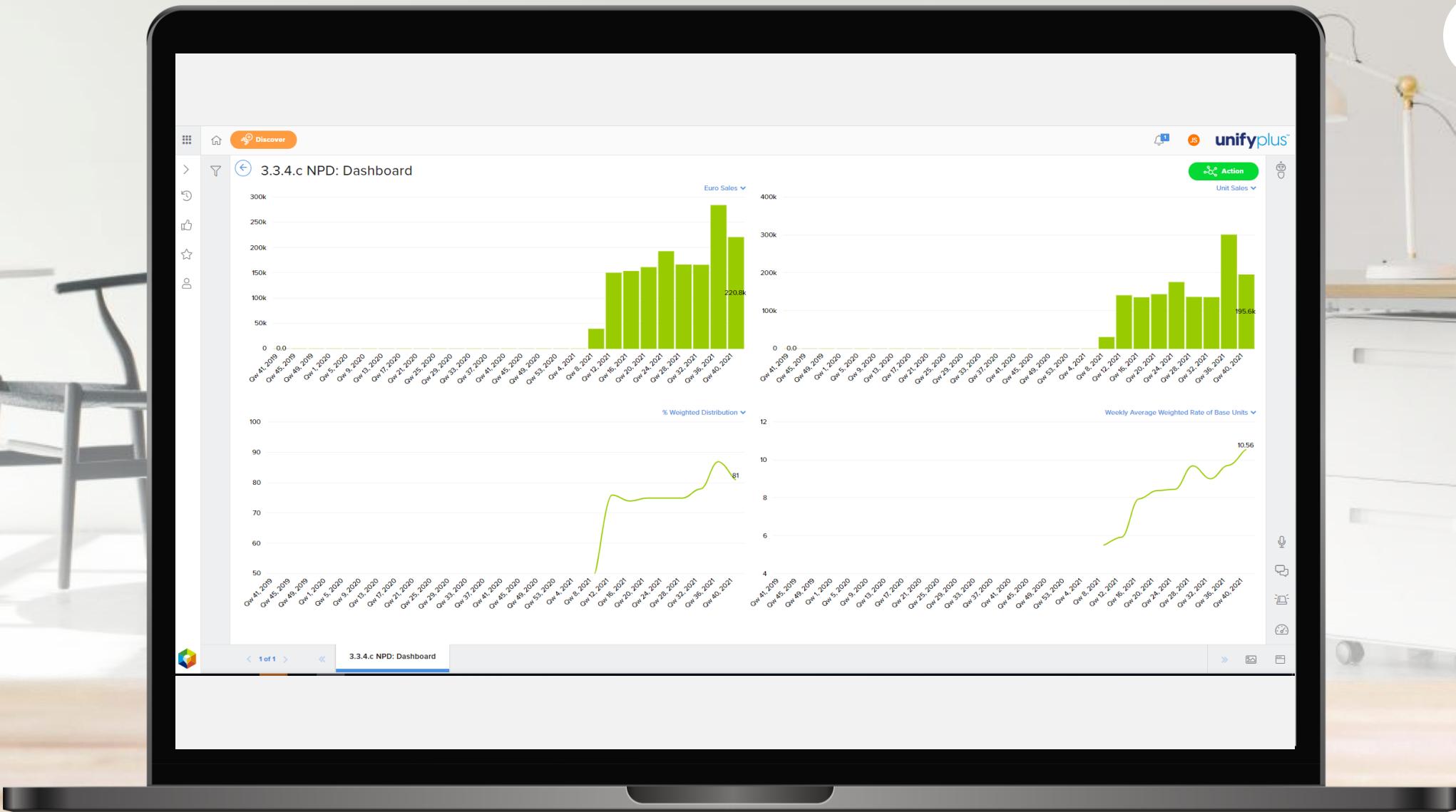
Ask Emiri aan het typen...

Alsjeblieft Bier brouwer, hier is uw gewenste rapport.

The dashboard displays three data series:

- Euro Sales:** A bar chart showing sales volume across time periods. The highest peak is approximately 350k.
- % Weighted Distribution:** A bar chart showing the percentage of weighted distribution. The highest peak is approximately 12%.
- Weekly Average Weighted Ratio of Base Units:** A line chart showing the weekly average weighted ratio of base units. The highest peak is approximately 10.56.

Below the dashboard is a text input field with a microphone icon and placeholder text: "Ask EmIRI...".







Dutch food retail





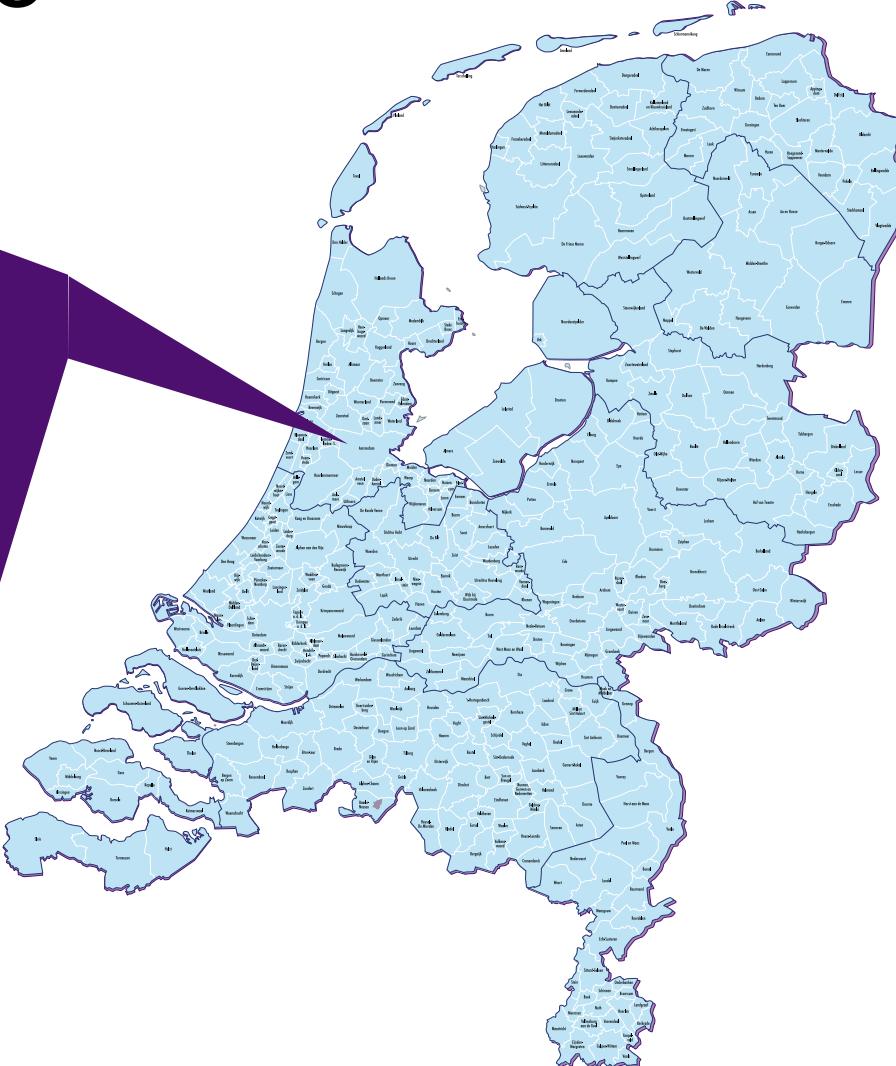
Database view

	Supermarkets incl. HD	Drug stores	Petrol Stations	Liquor Stores	Pure E-Com	Convenience Stores	New
Brick and mortar	 	 	 		 	 	
On-line		 					





Geography coverage





Geography coverage

We're a dedicated partner for all major food retailers – characterized by the most granular and most robust data.

45
Supermarkets

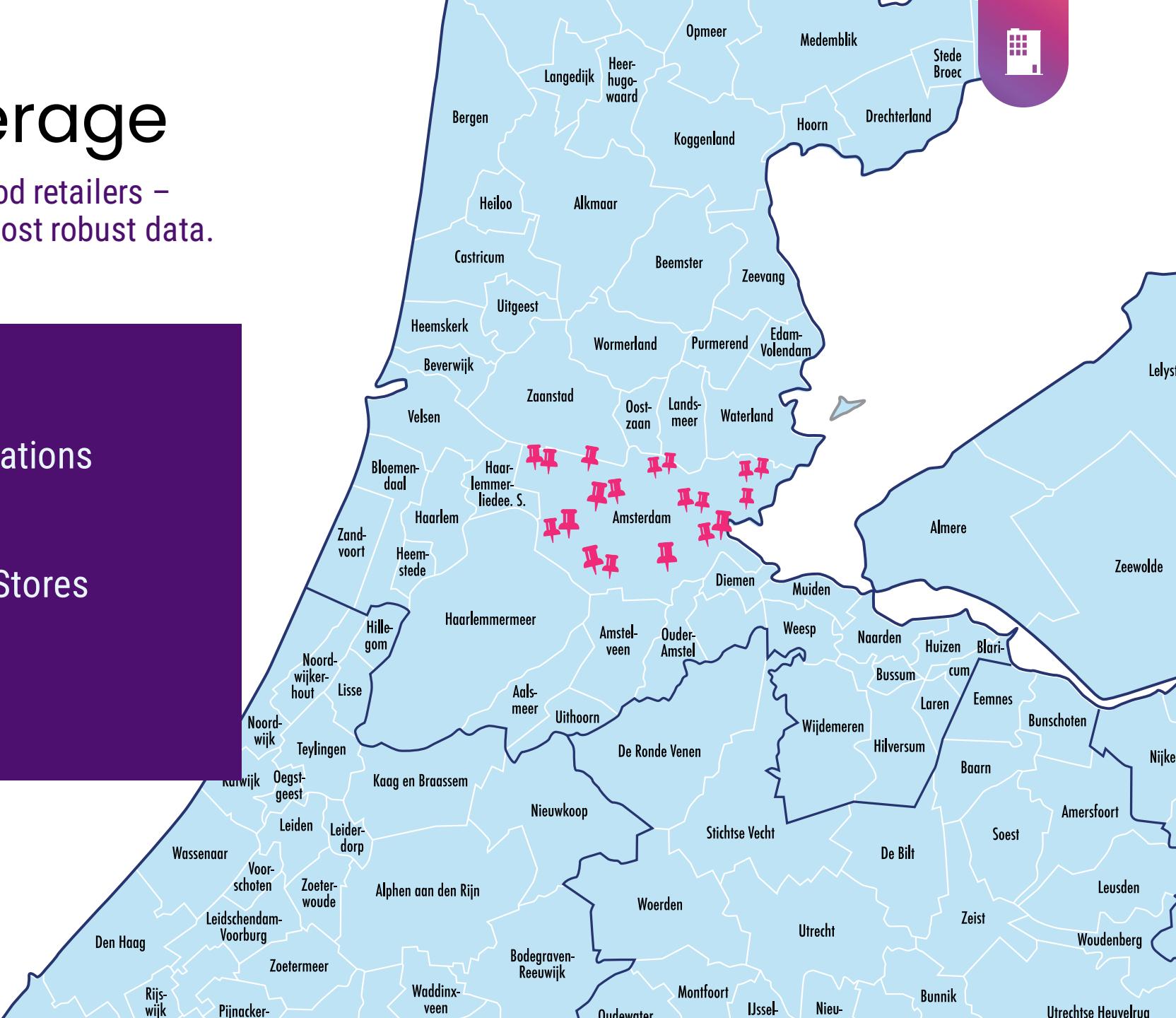
32
Hard discounters

15
Drug stores

7
Petrol Stations

12
Liquor Stores

5
Tabacco



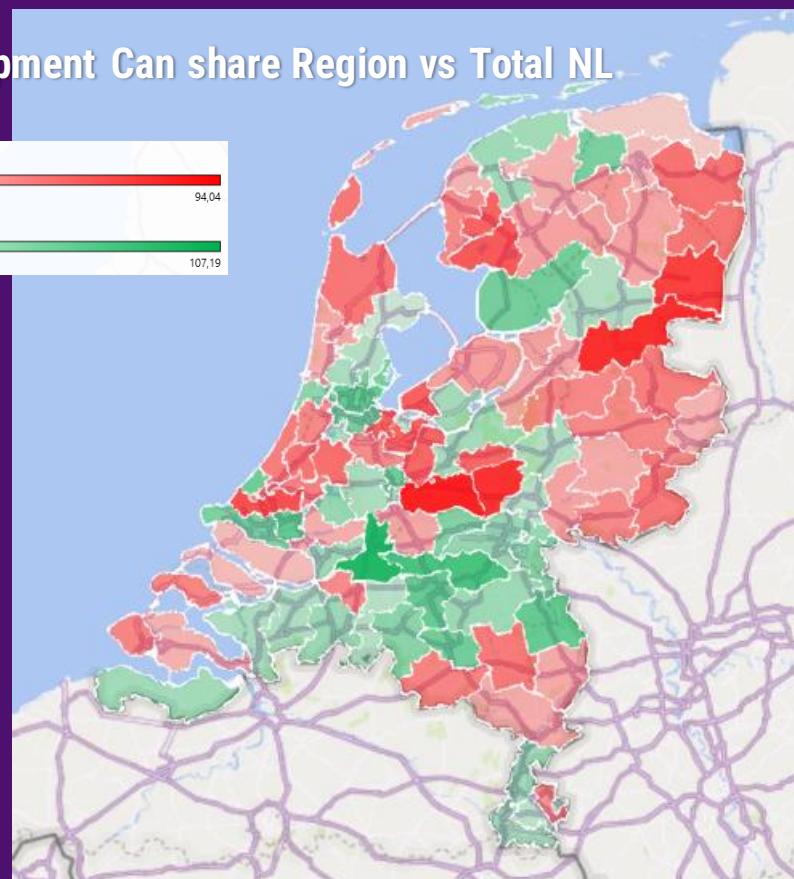
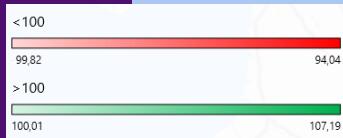
Zipcode data



The Challenge

Total retail data of the Netherlands does not show specific areas and there opportunities.

Development Can share Region vs Total NL



The Solution

Circana's zipcode databases give the opportunity to investigate zipcode level 2 data for more detailed analyses.

2014



MAT 40, 2023



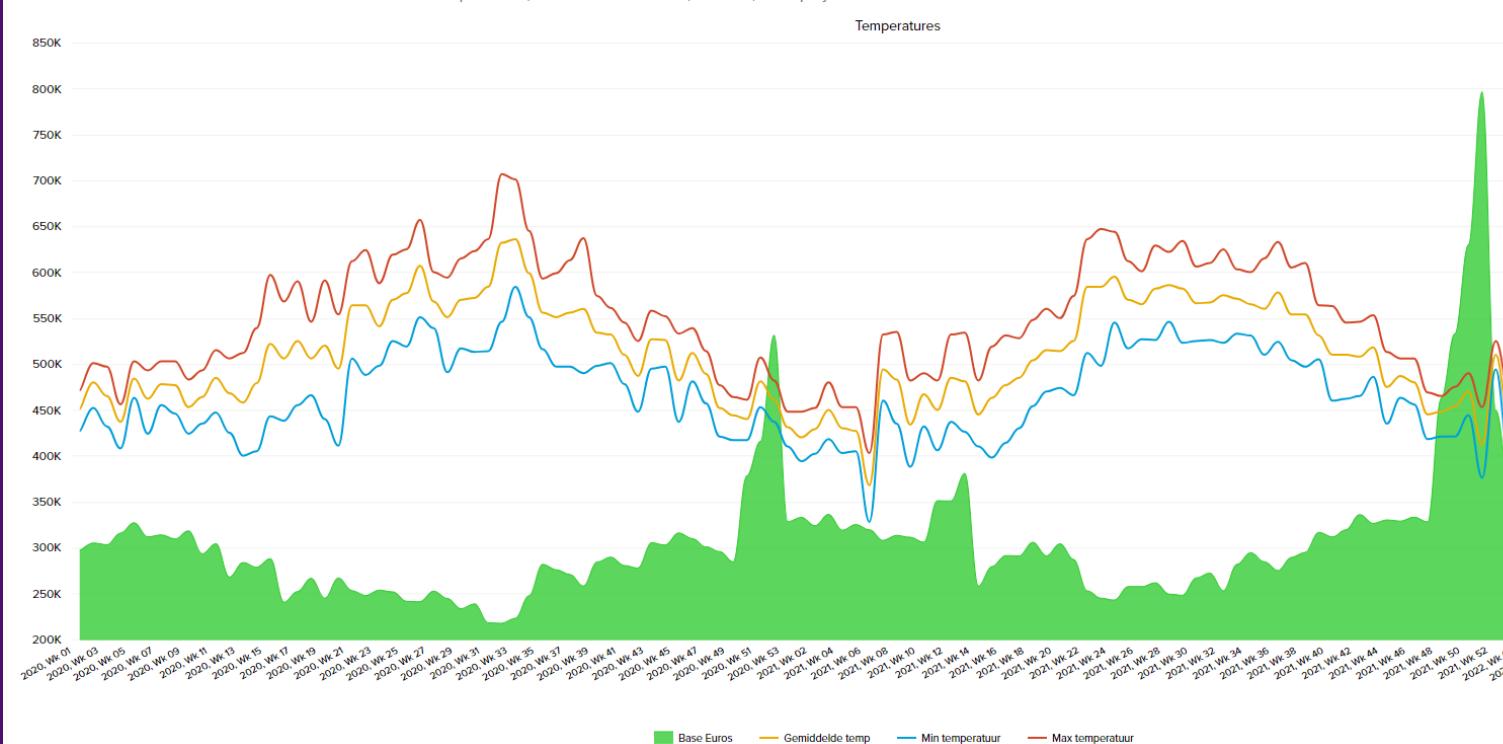
Weather data



Unify model containing weather data provided by [KNMI](#).
Provides the ability to plot this data next to Circana data.

The Challenge

External causal data can provide a comprehensive explanation for data trends but is often scattered across many different sources.



The Solution

Circana's Intelligence Suite allows external data to be integrated into the Unify platform. Utilizing this toolset, weather data can help getting quick insights to support confident decision making.

Time	Gemiddelde temp	Min temperatuur	Max temperatuur
2022, Wk 01	4.0	-0.2	7.2
2022, Wk 02	4.2	2.0	6.0
2022, Wk 03	4.5	1.5	6.7
2022, Wk 04	5.9	4.1	7.9
2022, Wk 05	7.2	4.5	9.1
2022, Wk 06	6.7	2.9	9.7
2022, Wk 07	8.1	5.6	10.6
2022, Wk 08	5.3	0.7	9.7
2022, Wk 09	3.9	-1.4	9.4
2022, Wk 10	8.8	3.3	14.0
2022, Wk 11	7.6	0.4	13.4
2022, Wk 12	9.6	1.7	17.4
2022, Wk 13	4.4	0.1	8.5
2022, Wk 14	7.9	3.9	11.3
2022, Wk 15	11.7	5.9	17.4
2022, Wk 16	12.1	6.5	17.1
2022, Wk 17	8.9	1.6	14.5
2022, Wk 18	12.4	5.5	19.0
2022, Wk 19	16.3	10.2	22.0
2022, Wk 20	16.2	9.4	22.0

5 measures available:

- Average temperature
- Minimum temperature
- Maximum temperature
- Evaporation
- Precipitation



Circana's own view



 Circana.

Manufacturer
View

Retail
view

Circana
View



Customer Care



Our local customer care team is on stand-by should you need help or have any questions





Customer care

Our local customer care team is on stand-by
should you need help or have any questions



Heleen van Waes
Business Consultant Sr.



Cecile Sporenberg
Insights Analyst



Lisanne Seegers
Client Service Executive



Thank you

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Stay in touch!

