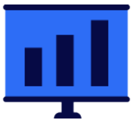
Using Market At A Glance (M@AG) reports

Overview

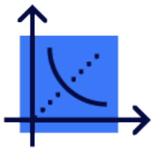
Use Market at a Glance Reports to better understand your market, the NIQ product design and your retailers in a selected country and category. From a product design perspective, you can use the Industry Design Coverage and covered versus non-covered channels to clarify your NIQ data scope. To better understand your market, view the information on macroeconomic stability, geographic coverage and country comparisons. Finally, access the information on the retail market structure, top five retailers and non-cooperating retailers for more insight on the retail composition.

Key features

Reports available for 82 countries and 30 categories



Coverage Walk shows Industry Design Coverage with covered and non-covered channels



Cross-country comparison for 50+ countries

Raw data extraction options (Available only in NIS webpage)

Open to all global clients

Who should use the reports, and how often?

All Retail Measurement Service (RMS) users can use the information in the M@AG Reports to understand market and retail dynamics with details related to market population, retailer participation and coverage values.

How often you'll use the reports will depend on your business, but here are a few use cases:

- The total retail universe in markets of your interest and industry coverage by NIQ
- Covered and non-covered channels
- Top retailers in your markets and categories
- The non-cooperating retailers in your markets and categories
- The comparison across markets on retail growth, modern trade, GDP or even population
- The NIQ Design Coverage for different categories across markets

Using Market At A Glance (M@AG) reports

Navigating the reports

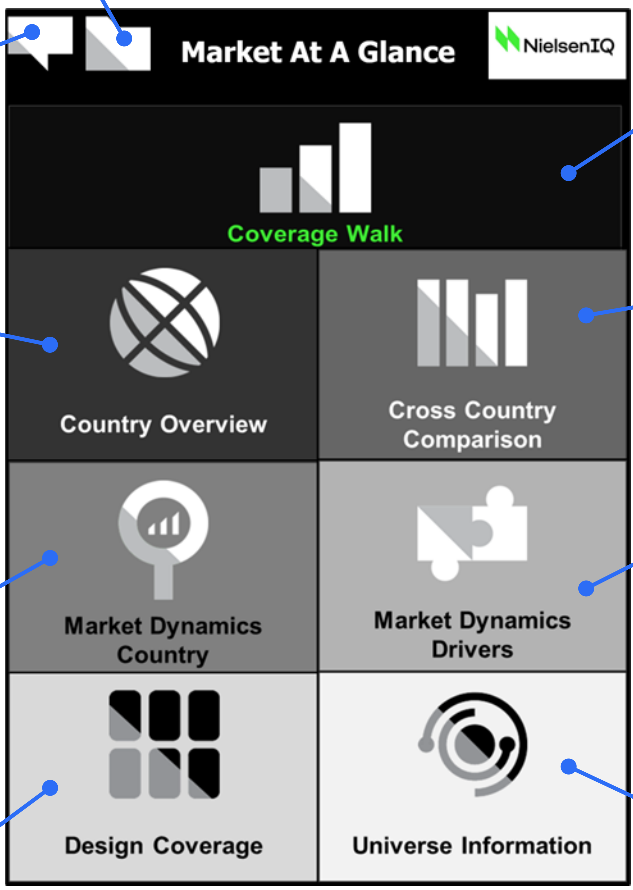
Glossary - All definitions and variables used in the reports

Contact - Information for M@AG support team

Country overview (page 4-5) - RMS overview with top retailers, non-cooperators, market indicators and service overview

Market dynamics country (page 7) - Quantifies the market factors that impact the ability to measure markets consistently over time

Design coverage (page 9) - Covered channel information for 50+ countries in one chart

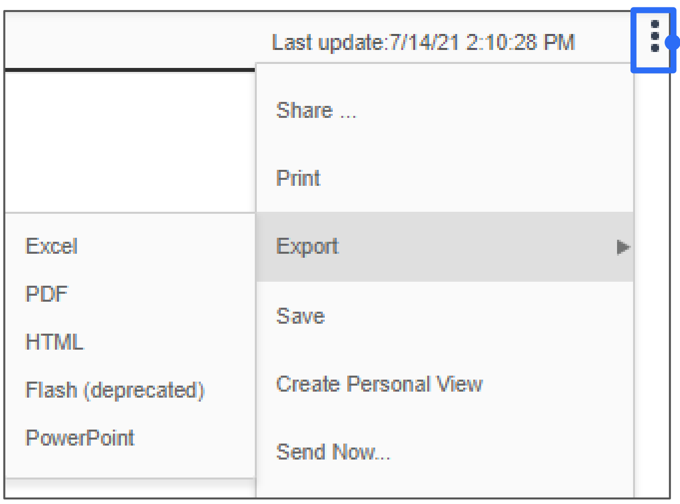


Coverage walk (page 3) - Also known as the Industry Coverage Matrix (ICM); Shows Industry Design Coverage and covered and non-covered channels for 30+ categories

Cross country comparison (page 6) - Charts can be populated for 50+ countries at a time

Market dynamics retail & macro drivers (page 8) - Retail and macro environment drivers causing volatility or stability in a country

Universe information (page 10) - Retail universe information at channel, store and trade type for 74 markets



More options - Share a link to your report, print, export to different file formats or send via email.

Using Market At A Glance (M@AG) reports

Coverage walk

What it shows

Identify the most relevant non-covered channels for potential coverage investments and opportunities of category expansion using the Coverage Walk. These charts estimate the size and composition by channels for different retail categories in a given country. The most useful information on this report is the non-covered channels

Business questions answered

- What channels does NIQ measure for different categories?
- How does this differ in different countries?
- In the country of my interest, how are local channels mapped to the global channels?
- Where can I see expansion potential in channels that I don't subscribe to?
- Do we need to change our NIQ channel measurement scope?

Category level coverage: Review the category level coverage by channel(s) in a given country.

Channel contribution (%): Overall percentage of channel distribution between covered and non-covered channels.

Charts: Displays all covered (top) and non-covered (bottom) channels, in order of importance, relative to the market in terms of sales value.

Global vs local store types

Year	Country	Global Store Type	Local Store Type
2019	Thailand	Bars/Pubs/Cafes	Restaurants
2019	Thailand	Convenc. Str.	Convenience Stores
2019	Thailand	Drugstores	Licensed Pharmacies
2019	Thailand	Ecom.	e-Retailers + Online sales of traditional Retailers (i.e. Tesco, Big C, etc)
2019	Thailand	Hypermrkts	HyperMarket
2019	Thailand	Large Supermrkts	Supermarket
2019	Thailand	Oth.Groc.Str.	Other FMCG
2019	Thailand	Pharmacies	Licensed Pharmacies
2019	Thailand	Restaurants/Hotels	Restaurants
2019	Thailand	Small Supermrkts	Supermarket
2019	Thailand	Superettes	Supermarket
2019	Thailand	Trad. Grocery Str.	Provision Stores (Open Trade)
2019	Thailand	Wholesalers	Wholesalers

Select Region
SEANAP

Select Countries
(All)
Australia
Indonesia
Malaysia
New Zealand
Philippines
Singapore
South Korea
Thailand
Vietnam

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Using Market At A Glance (M@AG) reports

Country overview

What it shows

A handy RMS overview that describes:

- What geographies and outlets NIQ covers in every country.
- Core Service Factors, like how many retail stores exist in the country, the Fast Moving Consumer Goods (FMCG) growth rates and the population percentage represented by the NIQ service.
- Key cooperators and non-cooperators.

Business questions answered

- What are the geographic details for my coverage?
- How much of NIQ historical data is available?
- Which outlets are covered? Not covered?
- What are the economic and population details of the market?
- Who are the most important retailers?
- Do any retailers not share data with NIQ?

MARKET AT A GLANCE Publication Year 2019

NORTH AMERICA | USA

Retail Measurement Service Overview:

- All of United States of America is covered except Alaska & Hawaii
- 5 years of historical data available
- Outlets Covered: Supermarkets, Drugstr., Mass Merchandisers, Club str., Dollar str., Military Commissaries, Convenience str. , Liquor str.
- Outlets Not Covered: Small Food & Drug str., Coscto, Toy, Home Improvement, E-commerce

Top Five Retailers:

COSTCO, KROGER CO/HQ, TARGET CORP, WALGREENS, WALMART INC

Non-Cooperators:

ALDI, All Other Non Coops, COSTCO, TRADER JOES

Market Indicators	
Total Population*	332,639,102
Population Growth Rate*	0.7%
GDP Official Exchange Rate*	19,490.0
GDP Purchasing Power Parity*	19,490.0
GDP Growth Rate*	2.2%
GINI Index*	45.0

Core Service Factors	
Retail Universe Store Count**	213,137
3 Year CAGR (Total ACV/PCV)	2.4%
Modern Trade Contribution**	100.0%
3 Year CAGR (MT ACV/PCV)	2.4%
Market Population Represented	99.0%
% Non-cooperators	10.0%

*Source: The World Bank (www.data.worldbank.org)
**Based on Total Grocery Stores, Convenience Stores, Drug Stores (Excluding Pharmacy and Perfumery)
Data on this page is updated on annual basis. So interim changes in the market are not reflected.

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Using Market At A Glance (M@AG) reports

Country overview (continued)

Market indicators	Definition
Total Population	Total number of people living in the selected country
Population Growth Rate	Compares the average annual percent change in populations
GDP Official Exchange Rate	Home-currency denominated annual GDP figure divided by the bilateral average US exchange rate with that country in that year
GDP Purchasing Power Parity	Sum value of all goods and services produced in the selected country valued at prices prevailing in the US in the year selected
GDP Growth Rate	How fast the selected country is growing
GINI Index	Measures the distribution of the selected country's income or wealth

Core service factors	Definition
Retail Universe Store Count	Number of stores that exist in the selected country
3 Yr CAGR (Total ACV/PCV)	3 Year CAGR calculated based on 4 Years of Total data (Modern Trade (MT), Traditional Trade (TT) and Mixed Trade (Mix TR)
Modern Trade Contribution	Percent of total sales volume accounted for by stores in Modern Trade
3 Yr CAGR (Total MT ACV/PCV)	3 Year CAGR calculated based on 4 Years of Total Modern Trade
Market Population Represented	Percentage of total category and country volume sales captured by NIQ RMS
% Non-cooperators	Estimated percentage of total category and country volume sales from non-cooperating retailers

Using Market At A Glance (M@AG) reports

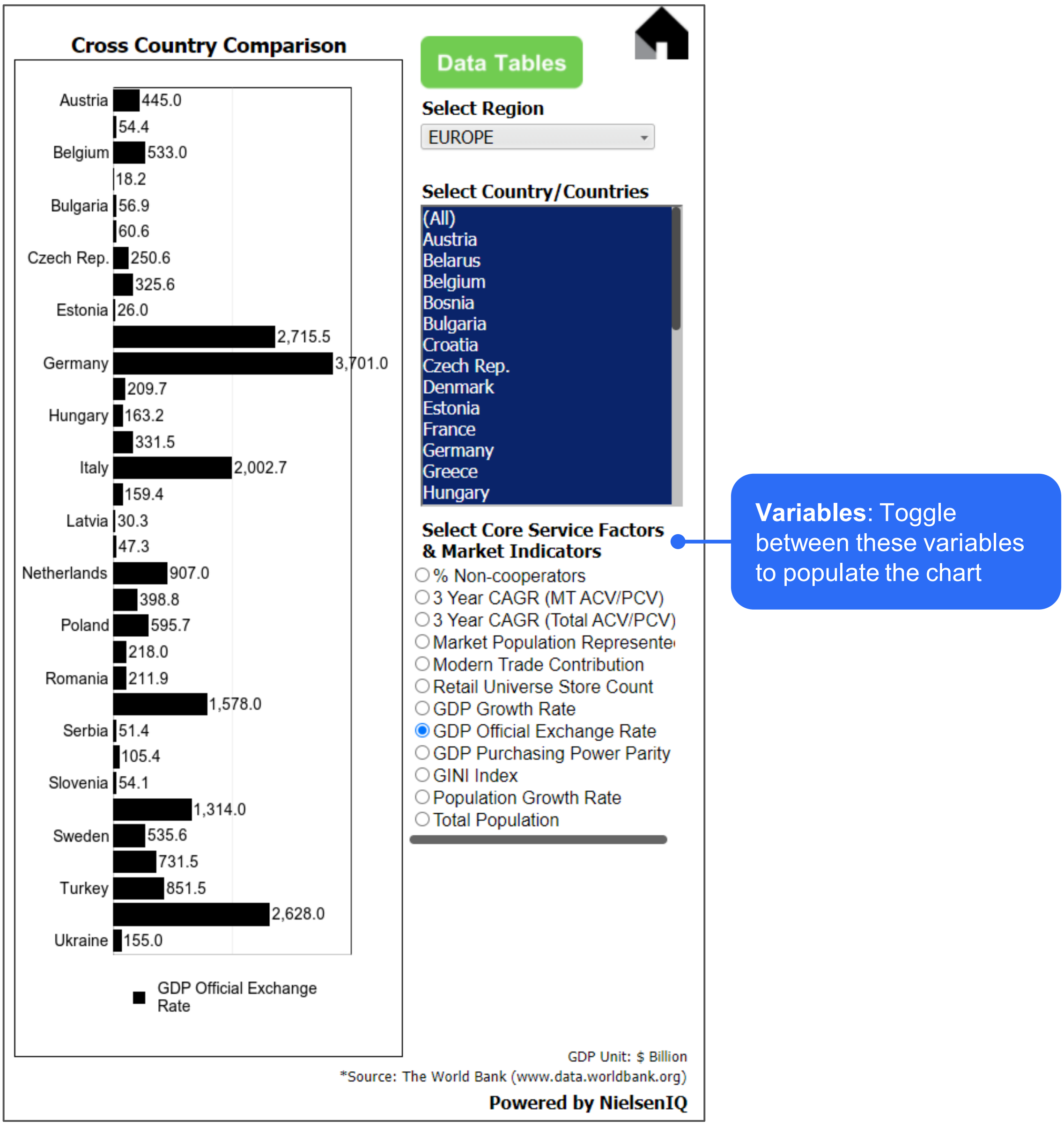
Cross country comparison

What it shows

See how you can capitalize on cross-country opportunities in this report. You can even compare up to 50 countries at one time.

Business questions answered

- Is there a way to compare countries of my choice on Market Indicators, such as population, GDP, etc.?
- Is there a way to compare countries of my choice on Core Service Factors, such as Retail Universe, Store Count, Non-cooperation percentage, etc.?
- Which countries have a higher modern trade contribution?



Using Market At A Glance (M@AG) reports

Market dynamics country

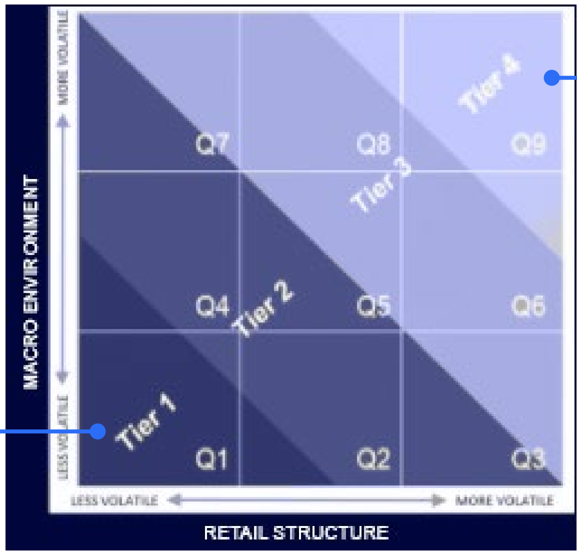
What it shows

The Market Dynamic Index quantifies the factors that could potentially impact market measurement, i.e., retail trade and macro environmental changes in a country.

Business questions answered

- What is the overall volatility of a country in terms of both retail and macro environment factors?
- Which factors lead to the volatility in a country?
- What is the NIQ Tier for a country and how can I incorporate it to compare data from different countries?

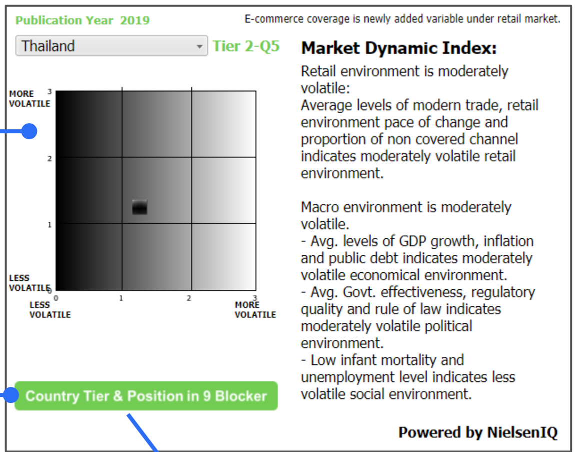
Tier 4: Tier 4 countries, like Egypt and Bangladesh, have volatile macro and retail dynamics.



Tier 1: Tier 1 countries - like the US, UK and Germany - have stable macro and retail dynamics.

Volatility level: Find detailed descriptions around volatility level, including which macro/retail variables are responsible for high/low volatility within the country.

Tier & position: Find a complete list of each country's tier and position in a 9 blocker.



Country	Tier Quadrant	Position
Algeria	Tier 4-Q8	Moderately volatile retail - More volatile macro
Argentina	Tier 3-Q6	More volatile retail - Moderately volatile macro
Australia	Tier 1-Q2	Moderately volatile retail - Less volatile macro

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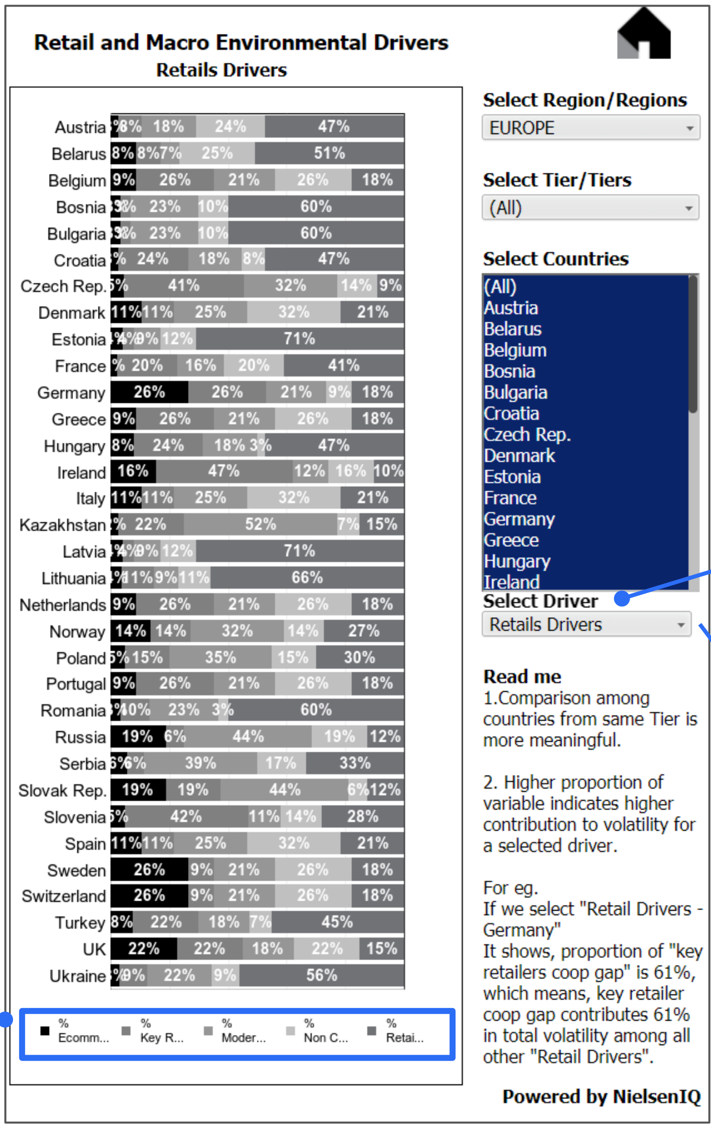
Market dynamics retail & macro drivers

What it shows

Once you know the status of a country by tier within the 9 blocker, you can go to this report and find details around retail, macro, political, social and economical drivers that can potentially affect market measurement.

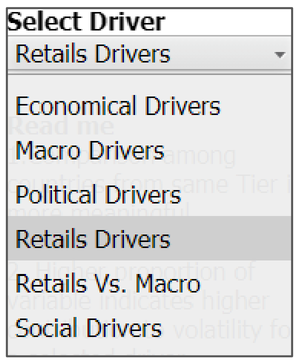
Business questions answered

- What are the Macro Drivers affecting the quality of data in a given set of countries?
- What are the Retail Drivers affecting the quality of data in a given set of countries?



Variables: The key changes depending on which driver you're viewing.

Driver: Compare multiple countries for selected variable and know which factors are causing more volatility.



Using Market At A Glance (M@AG) reports

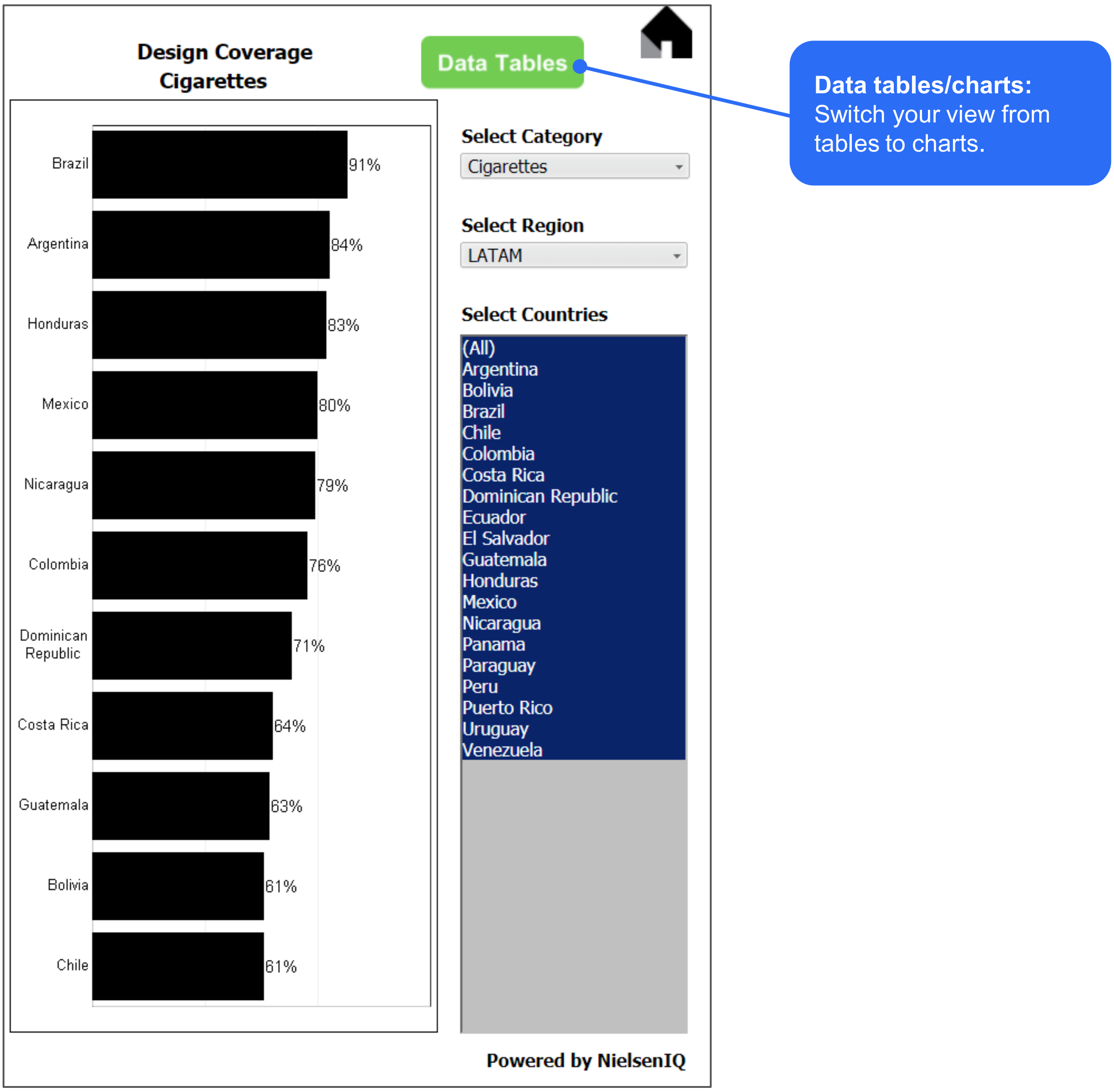
Design coverage

What it shows

The Design Coverage report provides the Industry Design Coverage according to the NIQ RMS service. This report shows information for **covered** channels—outlets and geographies—only.

Business questions answered

- Where can I compare countries on the basis of channels NIQ covers?
- Where can I see the design coverage by category across multiple countries?



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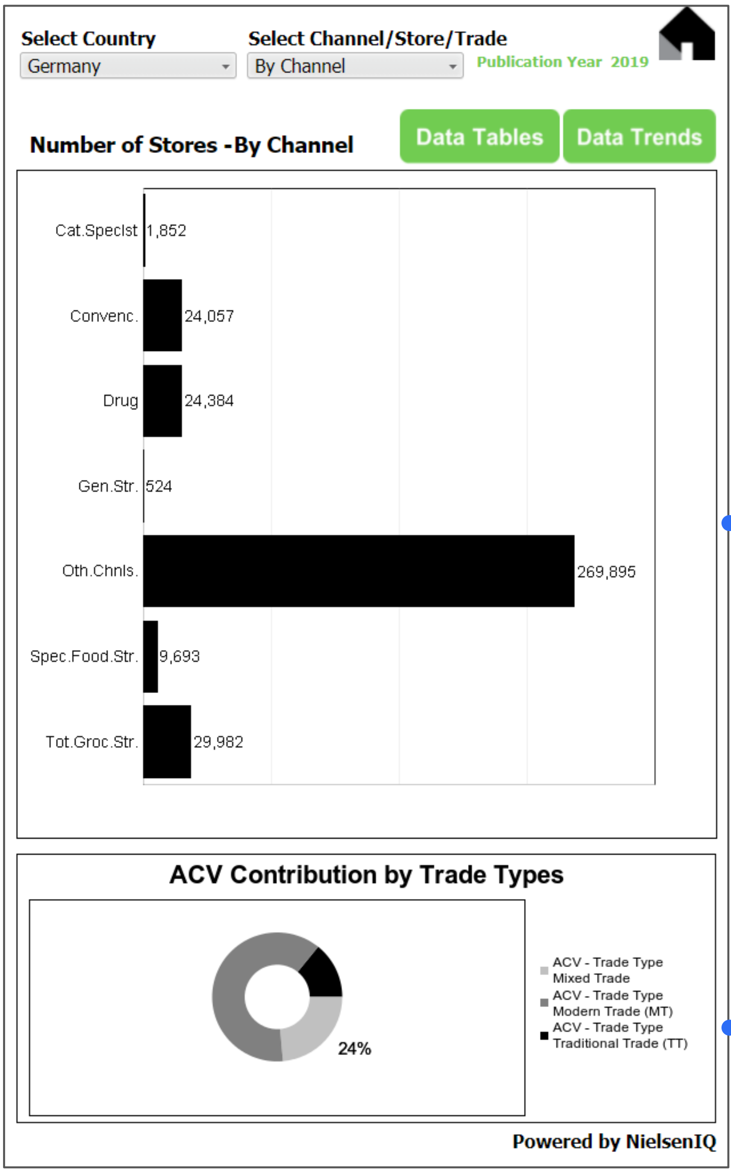
Universe information

What it shows

This report represents NIQ's estimate for each country's overall retail trade universe. Simply put, the total number of stores in a country by channel, store type or trade type.

Business questions answered

- Where can I get accurate information about the evolution of retail trade in a market?
- Where can I get total number of stores by channel, store type or trade type?
- Which channel or store type is the most popular in the selected country?
- Where can I see modern trade versus traditional trade contribution in a country?



Store counts: Refers to estimated universe of stores, for the channels covered by NIQ.

All Commodity Value (ACV) by trade type: Shows the contribution of modern, traditional or mixed trade to total sales in the country.