



**How to better
understand
consumers and build
action plans for
profitable growth.**

**insight
summit**
2025

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Introducing



Julien Loire
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FrieslandCampina at a glance



12.9 billion
euros revenue



Branches in
30 countries



19,576
employees



14,183
member
dairy farmers



-9,8%

GHG emissions
2023-2024

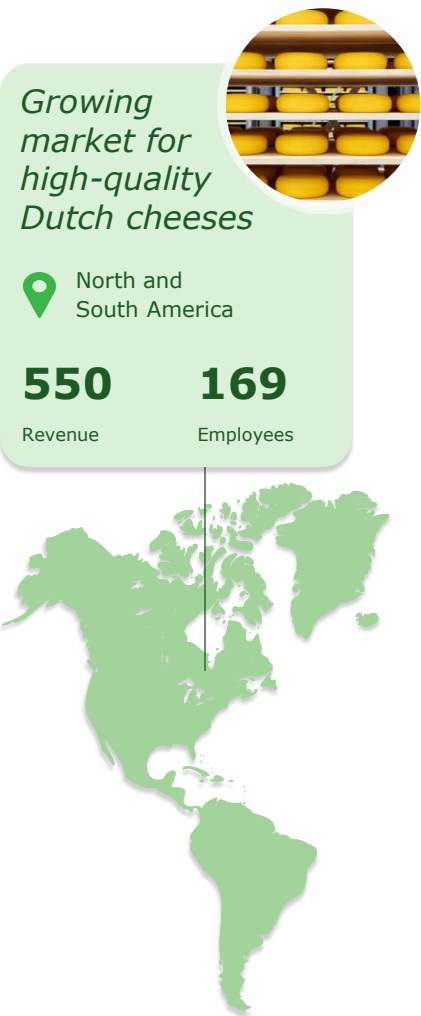


Export to
>100 countries



Every day
millions
of consumers

FrieslandCampina worldwide



Passion

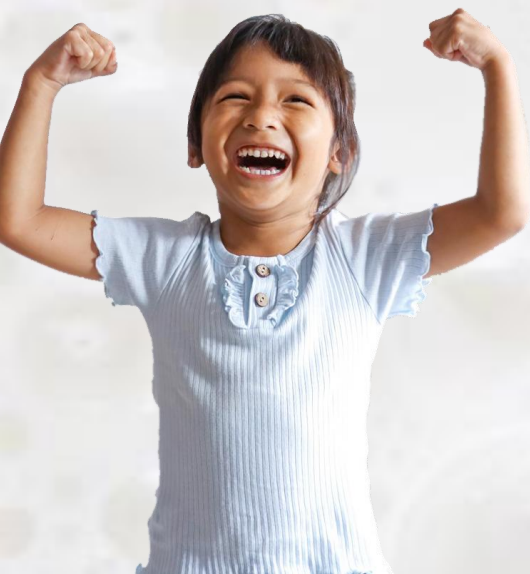
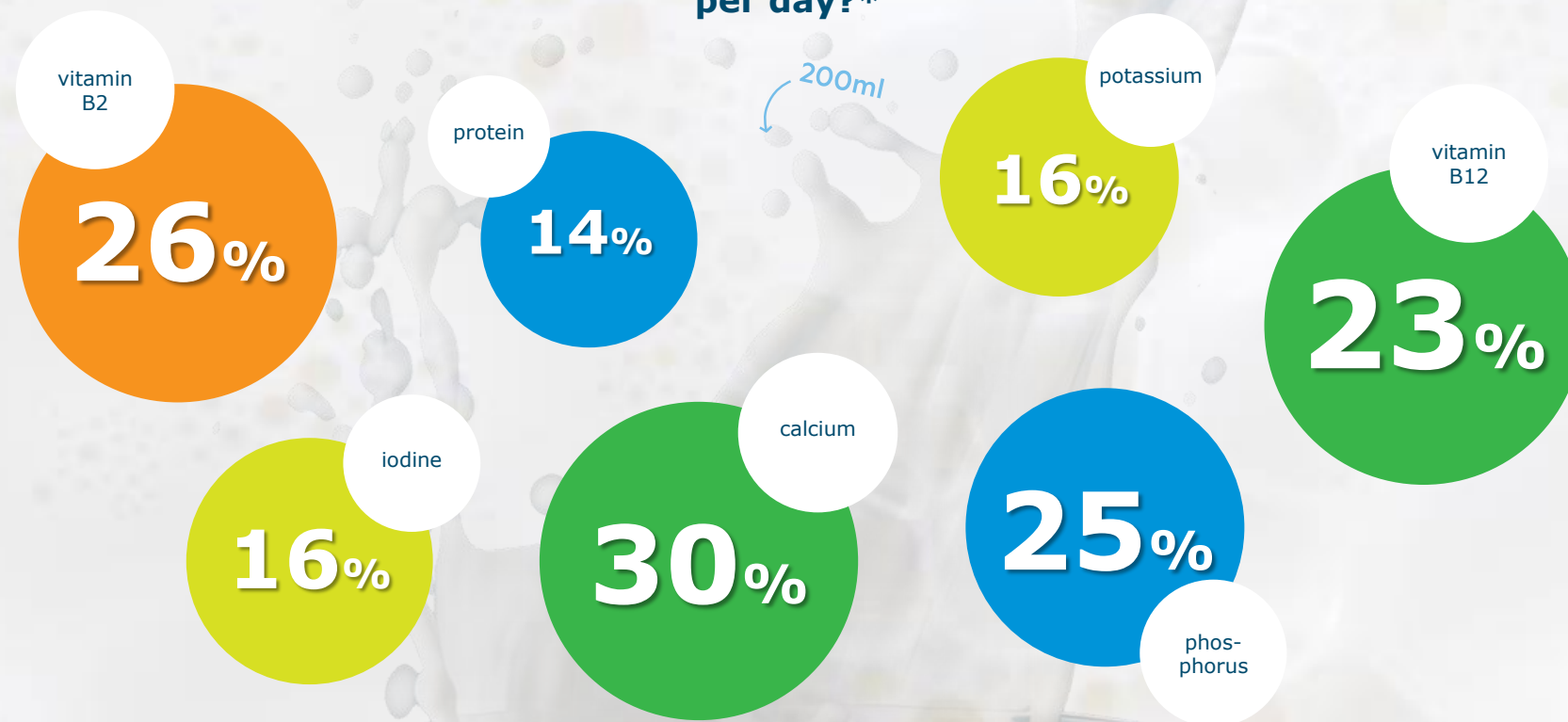
for nutrition



A strong global brand portfolio

Using milk as a basis for good health

How much does a glass of milk contribute to what you need per day?*



Challenges in Dairy



Declining numbers of Dairy Farms



Global Competition & Trade Barriers



Legal and Environmental uncertainty



Sustainability & Environmental Impact



Thin margins



Consumption patterns are shifting

Thin Margins are asking for strategic pricing models

Tight profit margins due to rising input costs and hard negotiation with customers

Traditional cost-plus pricing models are no longer sufficient to protect profitability

Need for strategic pricing models



Consumer Demands need to be understood

Understanding trends and shifts in milk consumption.

Identifying **Growth Opportunities** though deeper understanding of consumers relationship and habits with beverages and other liquid intakes throughout a day.



How do you find **your next**?

NIQ *Strategic Analytics & Insights*

What people want + **Why** they want it + **How** they want it



Where will Strategic Analytics & Insights focus?

Four key core use cases



Unexpected channel

Big location

Winning pricing strategy

Killer product

Customer segment

Your next...

Competitive promotion

Thriving partnership

Geo expansion

Risk hedge

Strategic move

**Consumer
Behaviour &
Insights**

**Innovation
powered by
BASES**

**Brand
and Media**

**Analytics
and
Activation**

*Growth starts
with your consumer,
so should your
growth strategy.*

“The #1 thing that has made
us successful by far was our
obsessive-compulsive focus
on the consumer”

Jeff Bezos



A close-up photograph of a hand pouring milk from a metal pitcher into a glass cup of coffee. The coffee has a latte art design on top. The hand is holding the cup, and the milk is being poured into the center of the design. The background is dark and out of focus.

*Understand and segment
consumer behavior in the
ambient milk (white &
flavored) market to drive
strategic growth and
enhance brand positioning.*

The Solution – Usage & Attitude + Liquid intake

- Collaborative insight journey
- Intensional, comprehensive and meaningful landscaping and segmentation of occasions
- Framework to select and sequence target opportunities
- Output driving action



We now have more insights about

- **Daily** consumption penetration of milk and adjacent categories
- **Children's** consumption behavior
- Consumption **moments**
- **Daily milk penetration** by age
- ...



Where will Strategic Analytics & Insights focus?

Four key core use cases



**Consumer
Behaviour &
Insights**

**Innovation
powered by
BASES**

**Brand
and Media**

**Analytics
and
Activation**

Manufacturers and retailers have many concerns

How do we maximize impact of promotions?

How do we optimize trade to drive sustainable growth?

What are the optimal price points, packs, and channels?

How can use analytics and insights for competitive advantage?

How to grow the category for the long term?

How to win with winners and avoid margin dilution?



Key insights & measurements we provide to embed in your RGM plans

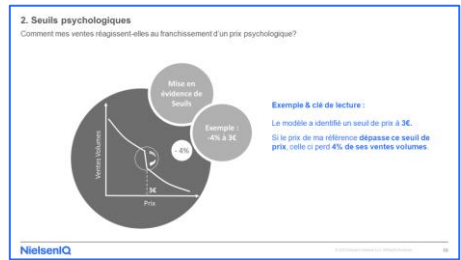
1 Elasticity

What is the price elasticity of my SKU and **how is it composed** across other market players?



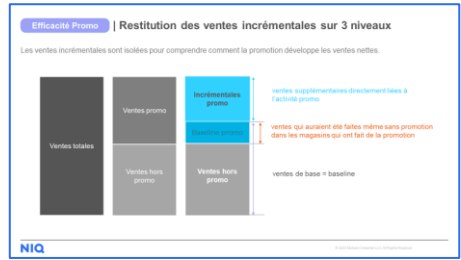
2 Thresholds

Are there **price gaps** or **price points** not to overpass for my products (psycho price)



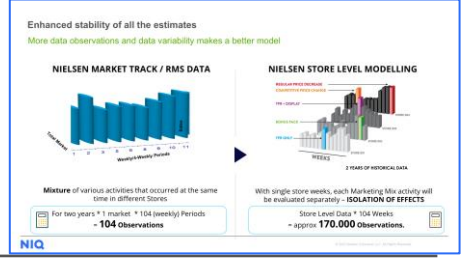
3 Incrementality

What is the **incremental impact** of our promo activity on our sales & profit?
What are the **incremental sales & profit** achieved by each of our SKUs?



4 Data quality

Store Level information benefits



Optimizing Commercial Levers to Drive Sustainable Category Growth

How to
win



Pricing

Optimal price positioning vs competitive set

Revenue and volume simulations based on price elasticity



Promotion

Improve promo ROI

Review different promo mechanisms

Review category promo landscape



Assortment and Mix

Drive profitable growth through:

- Brand mix
- Customer mix
- Category mix

Define Hero SKUs, profit drivers and traffic builders



Trade Terms

Optimize profit pools for customer and RFC

From cost based pricing to value based pricing



How we Translated insights into action





Anybody who doesn't
know this one??



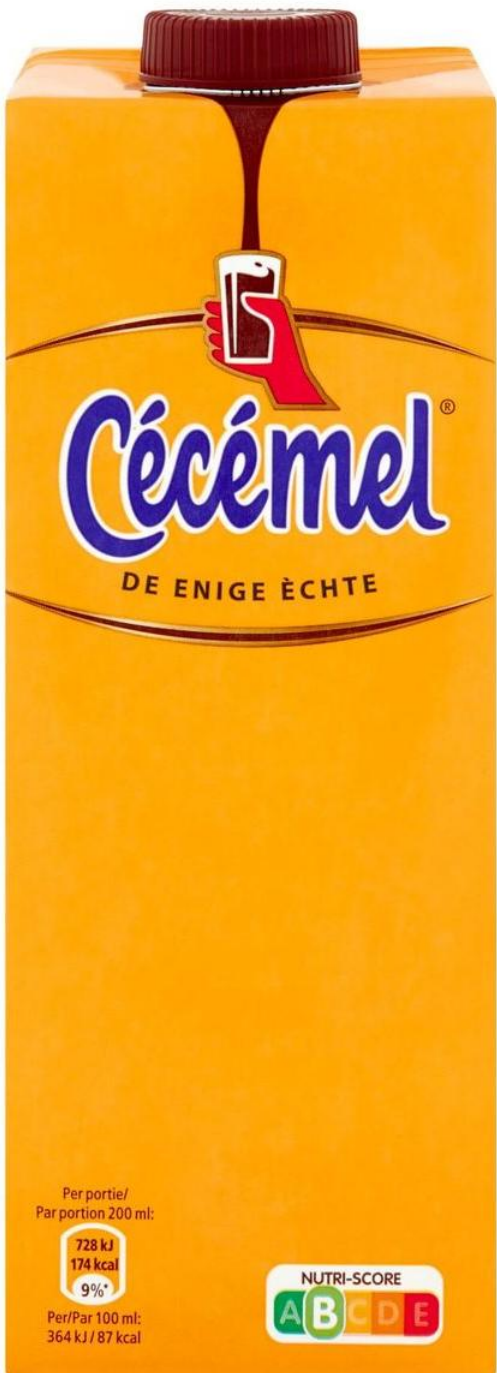


1²⁹
/st

**This SKU is being
sold under rsp***

**Retailers retain full discretion over final consumer pricing. All recommendations or insights shared are intended to support category growth and shopper value, and do not constitute pricing mandates.*

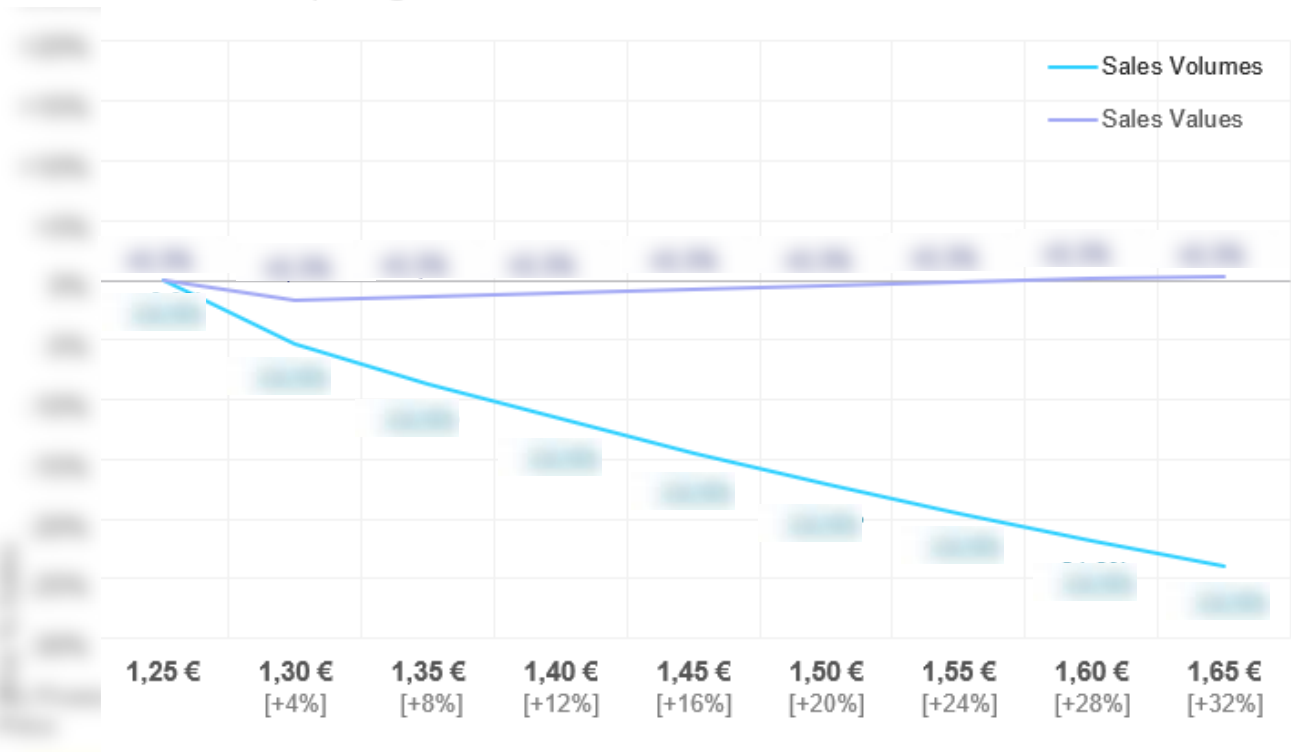
RSP = recommended selling price



Moderate reactive to price variations
Price increase impact on volume can be covered by additional value generated



Price Increase impact*
Cécémel 1L DEE | Belgium excl. Aldi Lidl



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PROMOS



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RSP = recommended selling price





Folder with display or even display only are generating significant higher incremental volume and value sales



Advice a rsp – drive smart promo strategy



Pricing

Moderate reactive to price variations
Price increase impact on volume can be covered by additional value generated

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Promotion

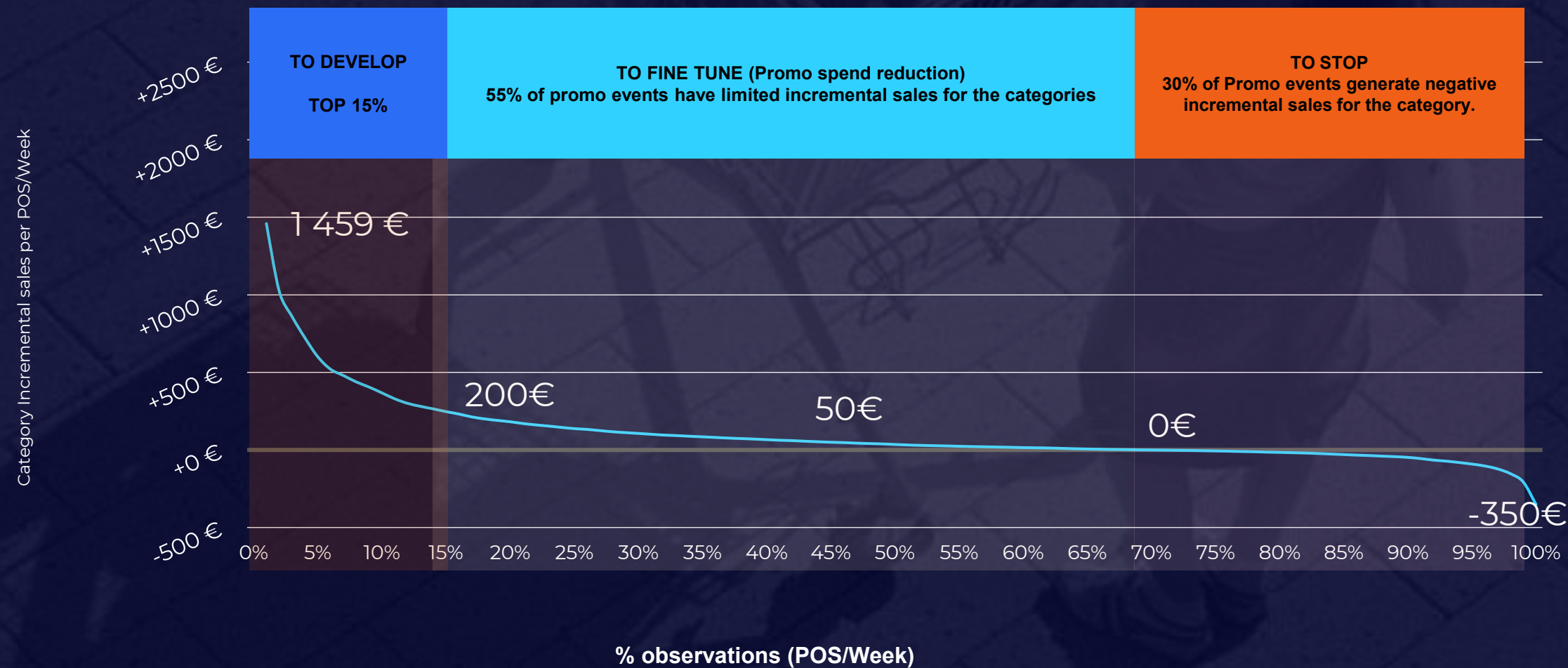
Reduce promo pressure of Cécémel 1L

- Less frequent promotions
- Change promo mechanism
- Drive second placement sales without promo
- Shift promo intensity to more profitable SKUs

Optimize promo plan to reduce loss in regular sales

Only 15% of promo activations generate incremental sales at category level

Promo clustering based on incremental sales measurement at category level in HM channel





Thank you!

*Please do not hesitate to contact
us with any comments or
questions.*